COVID-19 Consumer Tracker

Wave 31

Published: 27th May 2021
Fieldwork Period: 17 – 21 May 2021

UK Results
Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.
- The survey addresses themes such as: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as destination and accommodation types, alongside the reassurances they're seeking from the sector.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.
- Fieldwork for this wave’s results took place between 17th to 21st May 2021.
- The results are made publicly available and updated each wave at the following website:
  https://www.visitbritain.org/covid-19-consumer-sentiment-tracker
Definitions used within this report

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

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

<table>
<thead>
<tr>
<th>Project Period</th>
<th>Fieldwork Period</th>
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<th>Project Period</th>
<th>Fieldwork Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>18 – 22 May</td>
<td>Wave 14</td>
<td>31 August – 4 September</td>
<td>Wave 27</td>
<td>22 – 26 March</td>
</tr>
<tr>
<td>Wave 2</td>
<td>25 – 29 May</td>
<td>Wave 15</td>
<td>14 – 18 September</td>
<td>Wave 28</td>
<td>6 – 10 April</td>
</tr>
<tr>
<td>Wave 3</td>
<td>1 – 5 June</td>
<td>Wave 16</td>
<td>28 September – 2 October</td>
<td>Wave 29</td>
<td>19 – 23 April</td>
</tr>
<tr>
<td>Wave 4</td>
<td>8 – 12 June</td>
<td>Wave 17</td>
<td>12 – 16 October</td>
<td>Wave 30</td>
<td>4 – 9 May</td>
</tr>
<tr>
<td>Wave 5</td>
<td>15 – 19 June</td>
<td>Wave 18</td>
<td>26 – 30 October</td>
<td>Wave 31</td>
<td>17 – 21 May</td>
</tr>
<tr>
<td>Wave 6</td>
<td>22 – 26 June</td>
<td>Wave 19</td>
<td>9 – 13 November</td>
<td>Wave 32</td>
<td></td>
</tr>
<tr>
<td>Wave 7</td>
<td>29 June – 3 July</td>
<td>Wave 20</td>
<td>23 – 27 November</td>
<td>Wave 33</td>
<td></td>
</tr>
<tr>
<td>Wave 8</td>
<td>6 – 10 July</td>
<td>Wave 21</td>
<td>7 – 11 December</td>
<td>Wave 34</td>
<td></td>
</tr>
<tr>
<td>Wave 9</td>
<td>13 – 17 July</td>
<td>Wave 22</td>
<td>18 – 23 December</td>
<td>Wave 35</td>
<td></td>
</tr>
<tr>
<td>Wave 10</td>
<td>20 – 24 July</td>
<td>Wave 23</td>
<td>11 – 15 January</td>
<td>Wave 36</td>
<td></td>
</tr>
<tr>
<td>Wave 11</td>
<td>27 – 31 July</td>
<td>Wave 24</td>
<td>25 – 29 January</td>
<td>Wave 37</td>
<td></td>
</tr>
<tr>
<td>Wave 12</td>
<td>3 – 7 August</td>
<td>Wave 25</td>
<td>8 – 12 February</td>
<td>Wave 38</td>
<td></td>
</tr>
<tr>
<td>Wave 13</td>
<td>10 – 14 August</td>
<td>Wave 26</td>
<td>8 – 12 March</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Wave 31: Scorecard of Key Metrics

## Key Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>Wave 30</th>
<th>Wave 31</th>
<th>Wave Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>National mood (average score out of 10)</td>
<td>6.7</td>
<td>6.7</td>
<td>No change</td>
</tr>
<tr>
<td>Perceptions of the situation regarding Covid-19 (% stating ‘worst has passed’)</td>
<td>48%</td>
<td>39%</td>
<td>-9*</td>
</tr>
<tr>
<td>Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)</td>
<td>2.65</td>
<td>2.70</td>
<td>+0.05</td>
</tr>
<tr>
<td>Normality score (proportion expecting normality by December)</td>
<td>47%</td>
<td>43%</td>
<td>-4*</td>
</tr>
<tr>
<td>Leading two reasons for not feeling confident about taking a trip in Spring (May - June)</td>
<td>1. Restrictions on travel from government 2. Fewer things to do/places to visit</td>
<td>1. Restrictions on travel from government 2. Fewer things to do/places to visit</td>
<td>No change</td>
</tr>
<tr>
<td>Near-term confidence in taking UK overnight trip (May/June confident)</td>
<td>33%/43%</td>
<td>38%/45%</td>
<td>+5%/+2</td>
</tr>
<tr>
<td>Medium-term confidence in taking UK overnight trip (July/August confident)</td>
<td>55%/61%</td>
<td>54%/60%</td>
<td>-1/-1</td>
</tr>
<tr>
<td>Anticipated number of UK short breaks compared to normal (% more/the same)</td>
<td>51%</td>
<td>52%</td>
<td>+1</td>
</tr>
<tr>
<td>Anticipated number of UK longer breaks compared to normal (% more/the same)</td>
<td>48%</td>
<td>50%</td>
<td>+2</td>
</tr>
<tr>
<td>Proportion going on a UK overnight trip in Spring (May - June)</td>
<td>14%</td>
<td>13%</td>
<td>-1</td>
</tr>
<tr>
<td>Proportion going on a UK day trip in next two weeks</td>
<td>25%</td>
<td>26%</td>
<td>+1</td>
</tr>
<tr>
<td>Leading UK overnight destination likely to stay in Spring (May - June)</td>
<td>South West</td>
<td>South West</td>
<td>No change</td>
</tr>
<tr>
<td>Main type of overnight destination likely to stay in Spring (May - June)</td>
<td>Traditional coastal/seaside town</td>
<td>Traditional coastal/seaside town</td>
<td>No change</td>
</tr>
<tr>
<td>Main overnight accommodation type likely to stay in Spring (May - June)</td>
<td>Camping/caravan</td>
<td>Camping/caravan</td>
<td>No change</td>
</tr>
<tr>
<td>Place/activity likely to attract highest engagement compared to normal, post-lockdown</td>
<td>Outdoor areas (e.g. beaches, trails etc)</td>
<td>Outdoor areas (e.g. beaches, trails etc)</td>
<td>No change</td>
</tr>
<tr>
<td>Place/activity likely to attract lowest engagement compared to normal, post-lockdown</td>
<td>Predominantly indoor or covered attractions</td>
<td>Predominantly indoor or covered attractions</td>
<td>No change</td>
</tr>
</tbody>
</table>

* Represents a significant change on previous wave
1. The National Mood
The National Mood

- The average mood of U.K. adults remains unchanged since Wave 30 and marginally above the ‘all wave average’, at 6.7 out of 10.
- Although still a minority, there has been a significant rise in the proportion rating their mood as 9-10 out of 10 since Wave 30 (from 17% to 20%).

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

<table>
<thead>
<tr>
<th>Wave</th>
<th>Average</th>
<th>9-10</th>
<th>7-8</th>
<th>5-6</th>
<th>0-4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>6.7</td>
<td>17</td>
<td>44</td>
<td>25</td>
<td>13</td>
</tr>
<tr>
<td>All Wave</td>
<td>6.6</td>
<td>16</td>
<td>42</td>
<td>27</td>
<td>15</td>
</tr>
<tr>
<td>Wave 30</td>
<td>6.7</td>
<td>17</td>
<td>43</td>
<td>27</td>
<td>13</td>
</tr>
<tr>
<td>Wave 31</td>
<td>6.7</td>
<td>20</td>
<td>42</td>
<td>25</td>
<td>13</td>
</tr>
</tbody>
</table>

Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 31 n=1,760
Wave average is based on Wave 1 to Wave 30.
Perceptions of the situation relating to COVID-19

- The proportion who believe ‘the worst has passed’ in relation to COVID-19 has dropped by a significant 9 percentage points since Wave 30 – from 48% to 39%. Around 2 in 5 (42%) believe ‘things are going to stay the same’, whilst 1 in 5 (20%) think ‘the worst is still to come’ representing a significant rise on Wave 30.

Figure 2. Perception of the situation with regards to COVID-19, percentage wave-on-wave, UK

<table>
<thead>
<tr>
<th>Wave 1 (May 2020)</th>
<th>All Wave Average</th>
<th>Wave 30</th>
<th>Wave 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>22</td>
<td>48</td>
<td>39</td>
</tr>
<tr>
<td>33</td>
<td>38</td>
<td>12</td>
<td>20</td>
</tr>
<tr>
<td>42</td>
<td>40</td>
<td>42</td>
<td></td>
</tr>
</tbody>
</table>

Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
Base: All respondents. Wave 31 n=1,760 Wave average is based on Wave 1 to Wave 30.
Perceptions of when things will ‘return close to normal’

- Only a minority expect life to return ‘something close to normal’ by this summer – 13% by July, 21% by August and 30% by September – figures that are consistent with Wave 30.
- 43% expect normality by the end of the year, a significant drop on Wave 30 (47%).

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 31, UK

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

Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 31 n=1,760
Confidence in the ability to take overnight trips in UK

• 38% of U.K. adults are currently confident that an overnight domestic trip booked for May would go ahead, representing a significant rise on Wave 30 when 33% felt this way.
• Confidence that trips would go ahead increases with each subsequent month with a majority citing confidence from July onwards.

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 31, UK

<table>
<thead>
<tr>
<th></th>
<th>Wave 27</th>
<th>Wave 28</th>
<th>Wave 29</th>
<th>Wave 30</th>
<th>Wave 31</th>
</tr>
</thead>
<tbody>
<tr>
<td>May</td>
<td>13</td>
<td>12</td>
<td>16</td>
<td>20</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>25</td>
<td>33</td>
<td>38</td>
<td>40</td>
<td>40</td>
</tr>
</tbody>
</table>

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

QVB7anew. We’d like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All respondents. Wave 31 n=1,760
Top 5 reasons for not feeling confident about taking overnight trips in the UK

- ‘Restrictions on travel from government’ is the top reason people do not feel confident about taking an overnight trip during spring, some 6 percentage points ahead of ‘fewer things to do/places to visit’.
- ‘Restrictions from government’ is also the leading reason cited by those lacking confidence in taking summer trips, with ‘concerns about catching COVID-19’ and ‘personal finances’ close behind.

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 31, UK

<table>
<thead>
<tr>
<th>Reason</th>
<th>Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restrictions on travel from government</td>
<td>40</td>
<td>34</td>
</tr>
<tr>
<td>Fewer things to do/places to visit</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>Personal finances</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Fewer opportunities to eat/drink out</td>
<td>30</td>
<td>26</td>
</tr>
<tr>
<td>Restrictions on opportunities to socialise</td>
<td>29</td>
<td>24</td>
</tr>
</tbody>
</table>

Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 31, UK

QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 31 respondents not confident about taking a break in Spring n=298 and Summer n=443. *Spring is defined as May to June, Summer is defined as July to September.
The ‘Appetite for Risk’

• This wave’s ‘appetite for risk’ score is 2.7, unchanged from last wave.
• However, there have been some increases in comfort levels for a range of activities including ‘eating at a restaurant’, ‘visiting an indoor attraction’ and ‘visiting a busy city centre’.

*Figure 9. Level of comfort conducting a range of activities separately and combined, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, UK*
2. Overnight Trip Intentions
Anticipated number of U.K. and overseas trips compared to normal

- Between now and the end of the year, around half of U.K. adults intend to take more or about the same number of domestic short breaks (52%) or longer breaks of 4+ nights (50%) compared to normal, which is broadly consistent with Wave 30.
- Also consistent with previous reporting, a significantly lower proportion anticipate taking more or about the same number of overseas trips this year compared to normal.

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 31, UK

Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 31, UK
When anticipate to plan and book the next overnight trip in UK

- 24% of U.K. adults claim to have already planned and 19% already booked their next domestic overnight trip, both of which have risen by 2 percentage points since Wave 30.
- 40% are likely to have planned a domestic overnight trip by the end of spring, with almost a third (32%) expecting to have one booked.

**Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 31, UK**

- Not planning at any point
- Don't know but would like to
- 2022 onwards
- October to December
- Summer (July to September)
- Spring (May to June)
- Already planned / booked

**Wave 31**
- 24
- 13
- 7
- 14
- 16
- 24

**Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 31, UK**

- Not planning at any point
- Don't know but would like to
- 2022 onwards
- October to December
- Summer (July to September)
- Spring (May to June)
- Already planned / booked

**Wave 31**
- 24
- 15
- 7
- 6
- 16
- 13
- 19
When anticipate taking overnight trips in the UK and impact on U.K. trip if overseas restrictions lifted

- Nearly half (49%) of U.K. adults anticipate taking an overnight domestic trip by the end of 2021. 13% plan to do so this spring, 34% in the summer and 23% between October and December. Intent is largely consistent with Wave 30.
- The vast majority would continue to take their planned U.K. trip even if all overseas travel restrictions were lifted.

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 31, UK

Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 31, UK

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. Wave 31 n=1,760
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your planned overnight trip in the UK during <<insert month>>? Base: All Wave 31 respondents planning on taking a holiday or short break in the UK in Spring (May to June) n=211; Summer (July to September) n=448
Planning and booking timeline compared to normal

- The *planning* phase of spring trips is currently occurring slightly closer to the travel date than normal (on a net score basis) while for summer trips planning is happening further in advance.
- The ‘net’ position among both spring and summer intenders is that the actual *booking* of trips is presently happening closer to the travel date than usual.

**Figure 15.** PLANNING lead times for Spring or Summer trips compared to normal, percentage Wave 31, U.K.

<table>
<thead>
<tr>
<th></th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning closer</td>
<td>29</td>
<td>20</td>
</tr>
<tr>
<td>to the travel date</td>
<td>40</td>
<td>47</td>
</tr>
<tr>
<td>than normal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>About the Same</td>
<td>23</td>
<td>27</td>
</tr>
<tr>
<td>Planning further</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>from the travel date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>than normal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net (closer minus further away)</td>
<td>+6</td>
<td>-7</td>
</tr>
</tbody>
</table>

**Figure 16.** BOOKING lead times for Spring or Summer trips compared to normal, percentage Wave 31, U.K.

<table>
<thead>
<tr>
<th></th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking closer</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>to the travel date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>than normal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>About the Same</td>
<td>52</td>
<td>48</td>
</tr>
<tr>
<td>Booking further</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>from the travel date</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>than normal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net (closer minus further away)</td>
<td>+14</td>
<td>+14</td>
</tr>
</tbody>
</table>
Proportion of trip intenders that have already planned or booked their next overnight trip in the UK

- 7 in 10 (70%) spring intenders have already planned their forthcoming trip with 60% having already booked it (versus 69% and 54% in Wave 30).
- The proportion of summer intenders that have already planned (42%) or booked (35%) their trip has also increased since Wave 30 (up from 37% and 29% respectively).
- 27% of spring and 25% of summer overnight trips are transferred bookings that were previously cancelled or postponed due to Covid.

Figure 17. Proportion of Intenders that have already planned their trip, percentage Wave 31 for Spring and Summer, UK

Figure 18. Proportion of Intenders that have already booked their trip, percentage Wave 31 for Spring and Summer, UK

Figure 19. Proportion of next trips that are transferred bookings, percentage Wave 31 for Spring and Summer, UK

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 31 respondents planning on taking a holiday or short break in the UK in Spring (May to June) n=211; Summer (July to September) n=448
Ideal method of booking accommodation for next overnight trip in UK

- ‘Directly with an accommodation provider’ remains the leading anticipated method of booking accommodation across both spring and summer. An ‘online travel website’ is the next most preferred booking channel.

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 31, UK

• Spring Intenders
• Summer intenders

Directly with an accommodation provider
An online travel website
A Homestay website
On the website of a traditional travel agent
A transport provider website
A tourist board website
The store of a traditional travel agent
A tourist information centre
I will just turn up
Other

VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip. VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?
Base: All Wave 31 respondents planning on taking a holiday or short break in the UK in Spring (May to June) n=211; Summer (July to September) n=448
Where planning on staying on next overnight trip in UK

- The South West of England remains the lead destination for an overnight domestic trip during both the spring and summer periods.
- In line with previous waves, little separates the visitor share of the subsequent five destinations.

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 30 and 31, UK

Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 30 and 31, UK

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 30 and 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=452; Summer (July to September) n=889
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.
Destination type for next overnight trip in UK

- Nearly 2 in 5 (37%) spring intenders are likely to stay in a ‘traditional coastal seaside town’, some 8 points ahead of ‘countryside or village’ (29%). The other destinations types are significantly behind with broadly similar shares.
- For summer trips, the rank order is unchanged, although rural coastlines are likely to receive a higher share of visitors.

Figure 23. Main type of destination for trip in spring, percentage
Waves 30 and 31, UK

Figure 24. Main type of destination for trip in summer, percentage
Waves 30 and 31, UK
Accommodation type for next overnight trip in UK

- Consistent with Wave 30, ‘camping/caravan’ is the leading accommodation choice amongst spring intenders, although only marginally ahead of ‘hotel/motel/inn’, with ‘a private home’ and ‘commercial rental’ also close behind.
- ‘Commercial rental’ is the leading choice amongst summer intenders, marginally ahead of ‘camping/caravan’, ‘a private home’ and ‘a hotel/motel/inn’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 30 and 31

Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 30 and 31

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

Base: All Waves 30 and 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=452; Summer (July to September) n=889

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
Duration of the next overnight trip in UK

- Overnight domestic trips planned in the spring (May and June) are relatively evenly split between short breaks and longer breaks of 4+ nights. Longer breaks are significantly more likely in July and August, with an even split in September.

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 30 and 31, UK

May*: 4\% Longer break (4+ nights), 45\% Short break (1-3 nights), 50\% Unsure
June: 4\% Longer break (4+ nights), 50\% Short break (1-3 nights), 46\% Unsure
July: 2\% Longer break (4+ nights), 55\% Short break (1-3 nights), 42\% Unsure
August: 7\% Longer break (4+ nights), 57\% Short break (1-3 nights), 36\% Unsure
September: 5\% Longer break (4+ nights), 45\% Short break (1-3 nights), 49\% Unsure

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 30 and 30 respondents intending to take next holiday or short break in each time period: May n=208, June n=244, July n=284, August n=337, September n=268
Main mode of transport for next overnight trip in UK

- Across both time periods, ‘own car’ is by far the leading main mode of transport for travelling to an overnight destination, with 68% stating this for spring trips and 65% for summer trips.
- ‘Train’ remains the second most likely mode of travel to an overnight destination in both time periods.

Figure 28. Top 5 main modes of travel to destination for trip in spring, percentage, Wave 31, UK

Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 31, UK

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=211; Summer (July to September) n=448.
Vaccine impact on domestic overnight trip intent

- U.K. adults aged over 45 and who claim to have had at least one dose of a Covid-19 vaccine exhibit a greater likelihood to take either spring or summer overnight trips than over 45s that have not been vaccinated.
- Trip intent later in the year (between October and December) is the same regardless of vaccination status among this age group.

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 31, UK

<table>
<thead>
<tr>
<th></th>
<th>Vaccinated over 45s</th>
<th>Not vaccinated over 45s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring (April to June)</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Summer (July to September)</td>
<td>35</td>
<td>27</td>
</tr>
<tr>
<td>All October to December</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Don't know but it's something I would like to do</td>
<td>14</td>
<td>21</td>
</tr>
<tr>
<td>Don't intend to take a trip</td>
<td>31</td>
<td>27</td>
</tr>
</tbody>
</table>

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

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

Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely' minus ‘less likely’, Wave 31, UK

Outdoor areas (e.g. beaches, mountains, trails etc.)
Outdoor leisure or sports activities (e.g. walking, cycling, swimming etc.)
Predominantly outdoor attractions (e.g. theme parks, playgrounds etc.)
Health or wellbeing activities (e.g. spa/beauty, retreat or meditation, indoor swimming)
Catering, entertainment and events (e.g. restaurants, cinema, festivals etc.)
Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do over the next few months? Base: All Wave 31 respondents n=1,760
3. Day Trip Intentions
Day trip intention overall

- The likelihood to take day trips continues to increase in the short term with 26% of adults anticipating doing so in the next 2 weeks.
- Medium and longer-term day trip intention remains relatively consistent with previous waves.

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

- **Within the next 2 weeks**: Wave 26 = 28%, Wave 27 = 17%, Wave 28 = 22%, Wave 29 = 24%, Wave 30 = 25%, Wave 31 = 26%.
- **By later this spring or the summer**: Wave 26 = 57, Wave 27 = 60, Wave 28 = 66, Wave 29 = 64, Wave 30 = 62, Wave 31 = 64.
- **By autumn or later**: Wave 26 = 72, Wave 27 = 75, Wave 28 = 79, Wave 29 = 77, Wave 30 = 76, Wave 31 = 76.
- **No plans to take a day trip at any point**: Wave 26 = 28, Wave 27 = 25, Wave 28 = 21, Wave 29 = 23, Wave 30 = 24, Wave 31 = 24.

QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 31 respondents n=1,760 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.

Day trips to large cities or smaller cities/towns by the autumn continue to index the lowest out of all destination types.

QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 31 respondents n=1,760

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.
Life stage of day trip intenders

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

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 31, UK

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>U.K. Population</th>
<th>All Day Trippers by Summer</th>
<th>Countryside or Village Day Trippers</th>
<th>Traditional Coastal/Seaside Town Day Trippers</th>
<th>Large City Day Trippers</th>
<th>Smaller City or Town Day Trippers</th>
<th>Rural Coastline Day Trippers</th>
<th>Mountains or Hills Day Trippers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement Age</td>
<td>22</td>
<td>16</td>
<td>15</td>
<td>14</td>
<td>8</td>
<td>13</td>
<td>17</td>
<td>16</td>
</tr>
<tr>
<td>Older Independents</td>
<td>30</td>
<td>28</td>
<td>28</td>
<td>31</td>
<td>22</td>
<td>28</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>Families</td>
<td>30</td>
<td>37</td>
<td>36</td>
<td>37</td>
<td>44</td>
<td>38</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>18</td>
<td>27</td>
<td>22</td>
<td>18</td>
<td>21</td>
</tr>
</tbody>
</table>

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 31 respondents: *All day trippers within the next 2 weeks/early spring summer n=1128; All day-trippers Countryside or village day trippers n=762; Traditional coastal/seaside town day trippers n=817 Large city day trippers n=487 Smaller city or town day trippers n=585 Rural coastline day trippers n=703 Mountains or hills day trippers n=582
Methodology

• The findings in this report are based on an online survey conducted amongst a sample of the U.K. adult population.

• In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.

• This report presents findings from Wave 31 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-30 where appropriate. Wave 31 fieldwork was conducted between 17th and 21st May 2021.