COVID-19 Consumer Tracker

Wave 25
Fieldwork Period: 8 – 12 February

U.K. 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 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.

• This tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.

• NOTE: Fieldwork for this Wave’s results took place between 8th – 12th February.

• 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.

- **Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between [January and March 2021](#).

- **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between [April and June 2021](#).
## Fieldwork Periods

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

### Table 1. Top line Metrics – General Sentiment Scores

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Wave 24</th>
<th>Wave 25</th>
<th>Wave Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>National mood (average score out of 10)</td>
<td>6.5</td>
<td>6.5</td>
<td>No change</td>
</tr>
<tr>
<td>Perceptions of the situation regarding Covid-19 (% stating ‘worst has passed’)</td>
<td>19%</td>
<td>29%</td>
<td>+10*</td>
</tr>
<tr>
<td>Risk score: Comfort in undertaking a range of activities (1-4 comfort score)</td>
<td>2.3</td>
<td>2.5</td>
<td>+0.2</td>
</tr>
<tr>
<td>Normality score (proportion expecting normality by June)</td>
<td>18%</td>
<td>16%</td>
<td>-2</td>
</tr>
<tr>
<td>The main reasons for not feeling confident about taking a trip in Spring</td>
<td>1. Restrictions on travel from government 2. Concerns about catching Covid-19</td>
<td>1. Restrictions on travel from government 2. Not responsible to travel in this period</td>
<td>New Number 2</td>
</tr>
</tbody>
</table>

* Represents a significant change on previous wave

### Table 2. Top line Metrics – General Trip Intentions

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Wave 24</th>
<th>Wave 25</th>
<th>Wave Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated number of UK short breaks compared to normal (% more/the same)</td>
<td>32%</td>
<td>32%</td>
<td>No change</td>
</tr>
<tr>
<td>Anticipated number of UK longer breaks compared to normal (% more/the same)</td>
<td>31%</td>
<td>31%</td>
<td>No change</td>
</tr>
<tr>
<td>Near-term confidence in taking UK overnight trip (Feb/March confident)</td>
<td>6%/8%</td>
<td>7% /9%</td>
<td>+1/+1</td>
</tr>
<tr>
<td>Medium-term confidence in taking UK overnight trip (April/May confident)</td>
<td>11%/20%</td>
<td>12%/20%</td>
<td>+1/=</td>
</tr>
<tr>
<td>Proportion going on a UK overnight trip in Spring (April – June)</td>
<td>14%</td>
<td>13%</td>
<td>-1</td>
</tr>
<tr>
<td>Split between longer break / short break / don’t know for Spring trip</td>
<td>54%/39%/7%</td>
<td>50%/41%/10%</td>
<td>-4/+2/+3</td>
</tr>
</tbody>
</table>
Wave 25: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Wave 24</th>
<th>Wave 25</th>
<th>Wave Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leading UK destination likely to stay in Spring</td>
<td>South West</td>
<td>South West</td>
<td>No Change</td>
</tr>
<tr>
<td>Main type of destination likely to stay in Spring</td>
<td>Traditional coastal/seaside town</td>
<td>Traditional coastal/seaside town</td>
<td>No Change</td>
</tr>
<tr>
<td>Main accommodation type likely to stay in Spring</td>
<td>Camping/caravan</td>
<td>Camping/caravan</td>
<td>No change</td>
</tr>
</tbody>
</table>

* Represents a significant change on previous Wave

Table 4. Top line Metrics – Broader Leisure Activity

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Wave 24</th>
<th>Wave 25</th>
<th>Wave Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place/activity generating highest engagement</td>
<td>Outdoor areas</td>
<td>Outdoor areas</td>
<td>No change</td>
</tr>
<tr>
<td>compared to normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place/activity generating lowest engagement</td>
<td>Predominantly indoor or</td>
<td>Predominantly indoor or</td>
<td>No Change</td>
</tr>
<tr>
<td>compared to normal</td>
<td>covered attractions</td>
<td>covered attractions</td>
<td></td>
</tr>
</tbody>
</table>
1. The National Mood
The national mood

- The average mood of U.K. adults is unchanged on last wave and remains 6.5 out of 10.

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

<table>
<thead>
<tr>
<th></th>
<th>Wave 1 (May 2020)</th>
<th>Wave 24</th>
<th>Wave 25</th>
<th>All Wave Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>6.7</td>
<td>6.5</td>
<td>6.5</td>
<td>6.6</td>
</tr>
<tr>
<td>9-10</td>
<td>17</td>
<td>16</td>
<td>13</td>
<td>16</td>
</tr>
<tr>
<td>7-8</td>
<td>44</td>
<td>40</td>
<td>43</td>
<td>42</td>
</tr>
<tr>
<td>5-6</td>
<td>25</td>
<td>27</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>0-4</td>
<td>13</td>
<td>16</td>
<td>16</td>
<td>15</td>
</tr>
</tbody>
</table>

Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 25 n=1,760
Wave average is based on Wave 1 to Wave 24.
Perceptions of the situation in relation to COVID-19

- The proportion who consider ‘the worst has passed’ has significantly increased for the second consecutive wave to 29%.
- Accordingly, there has also been a 13 percentage point decline in the proportion stating ‘the worst is still to come’ compared to Wave 24.
- However, half of U.K. adults still feel ‘things are going to stay the same’ in the coming month.

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 25 n=1,760 Wave average is based on Wave 1 to Wave 24.
Perceptions of when things will return to ‘close to normal’

- 16% of U.K. adults anticipate life will return to something ‘close to normal’ by June this year, a slight decline on Wave 24.
- 42% expect ‘normality’ to return during the July-September period, although it’s not until we reach the final quarter of this year that the majority anticipate life will return to something ‘close to normal’ (56%).

Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 25 n=1,760

*Due to questionnaire wording changes, ‘by June’ figures pre-Wave 22 are based on expectations of normality returning ‘sometime between April and June’.
Appetite for risk

- The overall ‘appetite for risk’ score has risen by 0.2 points to 2.5
- All activities experience a rise in ‘comfort’ levels compared to Wave 24, with ‘going for a walk in a country park/local trail’, ‘shopping in your local shopping centre’ and ‘travelling by public transport’ returning to the All Wave Average.

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

Note: Winter is defined as January to March; Spring is defined as April to June
Anticipated number of U.K. trips by end of June compared to normal

- Consistent with Wave 24, almost a third of U.K. adults anticipate taking more or about the same number of domestic overnight short breaks (32%) and longer breaks (31%) compared to normal between now and the end of June.
- The proportion anticipating taking fewer trips has slightly fallen versus last wave, although more are now stating they ‘don’t know’.

Figure 6. Number of UK short breaks (1-3 nights) between now and the end of June compared to normal, Percentage
Wave 25, UK

Figure 7. Number of UK longer breaks (4+ nights) between now and the end of June compared to normal, Percentage
Wave 25, UK

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of June 2021? Base: All respondents. Wave 25 n=1,760.
Anticipated number of overseas trips by end of June compared to normal

- Around 1 in 4 of U.K. adults plan on taking more or about the same number of overseas short breaks (24%) and longer breaks (25%) compared to normal between now and the end of June.
- As with domestic trip intent, the proportion who expect to be taking fewer overseas trips declines versus Wave 24, although the proportion who ‘don’t know’ has increased.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 25, UK

<table>
<thead>
<tr>
<th>More</th>
<th>About the Same</th>
<th>Fewer</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>48</td>
<td>29</td>
<td>21</td>
</tr>
</tbody>
</table>

Wave 25

Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 25, UK

<table>
<thead>
<tr>
<th>More</th>
<th>About the Same</th>
<th>Fewer</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>47</td>
<td>28</td>
<td>21</td>
</tr>
</tbody>
</table>

Wave 25

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of June 2021? Base: All respondents. Wave 25 n=1,760.
Confidence in the ability to take a U.K. overnight trip

- Few are confident that an overnight domestic trip booked for this winter (defined as between now and the end of March) would be likely to go ahead as planned.
- Confidence in the ability to take domestic trips does begin to rise during the Spring and Summer periods, with evidence the levels are now stabilising; 32% are presently confident a June trip could proceed as planned, which is unchanged from Wave 24.
- It’s not until October onwards that confidence returns to a firm majority of UK adults (63%).

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 25, UK

Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK
Consistent with recent waves, ‘restrictions on travel from government’ remains the primary reason people do not feel confident about taking an overnight trip during either this Winter or Spring. However, concerns about catching COVID-19 is a less dominant factor than in Wave 24.

The leading five reasons for not feeling confident about taking trips this Spring are the same as Winter, although in a slightly differing rank order.

Figure 12. Top 5 reasons for not being confident about travelling in Winter*, Percentage Wave 25, UK

- Restrictions on travel from government (national or devolved)
- It’s not responsible to travel in this period
- I have concerns about catching COVID-19
- Fewer things to do/places to visit
- Fewer opportunities to eat/drink out

Figure 13. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 25, UK

- Restrictions on travel from government (national or devolved)
- It’s not responsible to travel in this period
- Fewer opportunities to eat/drink out
- I have concerns about catching COVID-19
- Fewer things to do/places to visit
When anticipating to plan and book the next U.K. overnight trip

- 11% claim to have already planned and 8% already **booked** their next domestic overnight trip, generally consistent with the previous two waves.
- 33% state they have either already planned or intend to plan their next trip by this Spring (defined as before the end of June) while 28% have already booked or intend to book their next trip by then.
- Just over a third are not intending to plan or book a trip at any point, which is slightly up on Wave 24.

**Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 25, UK**

- Not planning at any point: 34%
- Don’t know but would like to: 20%
- October 2021 onwards: 12%
- Summer: 9%
- Spring: 11%
- Winter: 6%
- Already planned / booked: 11%

**Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 25, UK**

- Not planning at any point: 35%
- Don’t know but would like to: 21%
- October 2021 onwards: 14%
- Summer: 11%
- Spring: 6%
- Winter: 8%
- Already planned / booked: 5%

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

Base: All respondents. Wave 25 n=1,760. *Winter = January to March; Spring = April to June; Summer = July to September
When anticipating going on a U.K. overnight trip

- Only 3% of U.K. adults now plan on taking a domestic overnight trip by the end of March. Some 13% anticipate taking one between April and June, which is 1 point down compared to Wave 24.
- Summer trip intent, at 27%, remains unchanged from Wave 24. Trip intent from October onwards is also stable at 20%.
- 34% are not intending to take any domestic overnight trips at all, which is up 2 percentage points on the previous wave.

Figure 16. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 25, 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 25 n=1,760.
Proportion already planned or booked their next U.K. overnight trip

- Just over half of Winter Intenders (52%) claim to have already planned their trip although just 30% have actually booked it.
- The proportion of those who have already planned or booked a Spring trip (between April – June) has risen to 44% and 31% respectively (up from 38% and 29% in Wave 24).

Figure 17. Proportion of Intenders that have already planned their trip, Percentage Wave 24-25 for Winter and Wave 25 for Spring, UK

Figure 18. Proportion of Intenders that have already booked their trip, Percentage Wave 24-25 for Winter and Wave 25 for Spring, 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 24-25 respondents planning on taking a holiday or short break in the UK in winter (January to March) n=113; All Wave 25 respondents in spring (April to June) n=209
Length of next overnight U.K. trip, by time period

- Overall, longer breaks of 4+ nights make up the majority of intended trips, but particularly those planned for the summer period (July – September).

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 24-25 respondents intending to take next holiday or short break in each time period: Winter n=128 (Jan – March); All Wave 25 respondents: Spring n=209 (Apr – June); Summer n=345 (July – Sept); October 2021 onwards n=171
Where planning on staying on next U.K. overnight trip

• Little separates the top 4 regions for an overnight stay this winter, although it should be re-iterated that only 3% of U.K. adults actually anticipate taking a trip during this period.

• The South West remains the leading destination for an overnight trip this Spring with a dominant 29% share, significantly ahead of second placed Scotland on 16%.

Figure 20. Where planning on staying on next UK overnight trip in winter, Percentage Waves 24-25, UK

Figure 21. Where planning on staying on next UK overnight trip in spring, Percentage Waves 24-25, UK

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434
Main mode of transport for next U.K. overnight trip

- Across both time periods, ‘own car’ continues to lead as the primary mode of transport for travelling to an overnight destination, with 44% anticipating using their car for winter trips, rising to 62% in spring.
- ‘Train’ is the second most likely mode of travel to an overnight destination in winter and spring, with a 17% share.

**QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?**

Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and All Wave 25 respondents from spring (April to June) n=209.
Type of destination for next U.K. overnight trip

- There is minimal separation in share between the top three destination types for Winter trips.
- ‘Traditional coastal/seaside town’ remains the lead destination type for Spring trips, followed by ‘countryside or village’.

Figure 24. Main type of destination for trip in winter, Percentage Waves 24-25, UK

Figure 25. Main type of destination for trip in spring, Percentage Waves 24-25, UK

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434
Type of accommodation for next U.K. overnight trip

- ‘Camping/caravan’, ‘a private home’, and ‘commercial rental’ remain the top 3 accommodation types for the comparatively few trips that are destined to happen this Winter.
- For Spring trips, ‘camping/caravan’, ‘hotel/motel/inn’ and ‘commercial rental’ are being considered by around 1 in 3 people respectively.

Figure 26. Accommodation planning on staying in on next UK overnight trip in winter, Net percentage Waves 24-25

Figure 27. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 24-25

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434
Method of booking accommodation for next U.K. overnight trip

- Booking directly with an accommodation provider remains the leading method of confirming accommodation across both time periods.
- An online travel website is the next most preferred booking channel for both Winter and Spring Intenders, with 22% and 24% choosing this method respectively.

**Figure 28. Accommodation booking channel for next trip in winter and spring, Percentage Wave 24-25 for Winter and Wave 25 for Spring, U.K.**

<table>
<thead>
<tr>
<th>Method of Booking</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directly with an accommodation provider</td>
<td>40%</td>
<td>24%</td>
</tr>
<tr>
<td>An online travel website</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>A Homestay website</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>A transport provider website</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>On the website of a traditional travel agent</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>A tourist information centre or tourist board office</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>A tourist board website</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>In the store of a traditional travel agent</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Other (Please write in)</td>
<td>14%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Base:** All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and All Wave 25 respondents for spring (April to June) n=209
Conditions essential to stay in accommodation this winter

• At a net level, ‘guest/staff interventions’ are the factors considered most essential for accommodation providers to have in place, driven primarily by the need for face masks to be worn by both guests and staff. ‘Booking incentives’ are close behind, with ‘free cancellations’ the most important requirement within this category.

Figure 29. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 24-25, UK

Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 24-25 Winter Intenders n=113
General leisure activity intentions as lockdown restrictions are lifted

- Consistent with Wave 24, outdoor areas are most likely to attract more visitors/engagement than normal (net +32), followed by outdoor leisure or sports activities (+16) and outdoor attractions (+9) – with outdoor attractions showing the biggest rise (+5 since Wave 24).
- ‘health or wellbeing activities’ (-13), ‘Catering, entertainment and events’ (-14) and ‘predominantly indoor attractions’ (net -19) are likely to attract fewer visitors/engagement than normal, though the net decline has improved compared to Wave 24.

Figure 30. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Wave 25, UK

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All Wave 25 respondents n=1,760
Methodology
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 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 25 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-24 where appropriate. Wave 25 fieldwork was conducted between 8\textsuperscript{th} and 12\textsuperscript{th} February 2021.
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.