

# COVID-19 Consumer Profiling Report

## Report 10

Published: 11<sup>th</sup> January 2022

Fieldwork Period: 4<sup>th</sup> – 10<sup>th</sup> November & 1<sup>st</sup> – 7<sup>th</sup> December 2021

### UK Results



# Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a monthly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays 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: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken .

The tracker was conducted weekly for 13 consecutive weeks from May 2020 to August 2020, fortnightly from September 2020 to September 2021, and monthly from November 2021 onwards. Each wave is based on a UK nationally representative sample of c1,500 adults aged 16+, with a boost sample for Scotland and Wales.

**The findings in this report are based on aggregating data from the November 2021 and December 2021 fieldwork.** Fieldwork periods are as follows: November 2021 (4<sup>th</sup> to 10<sup>th</sup> November); December 2021 (1<sup>st</sup> to 7<sup>th</sup> December).

# Definitions used within this report (1)

The report looks at trip intenders with the following definitions:

1. **Winter Intenders:** UK adults who intend to take a domestic overnight trip between January and March 2022
2. **Winter Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between January and March 2022 but have not yet booked their trip
3. **Spring Intenders:** UK adults who intend to take a domestic overnight trip between April and June 2022
4. **Spring Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between April and June 2022 but have not yet booked their trip
5. **Non-intenders:** UK adults who don't have any domestic overnight trips planned, but would consider it

Chapter 3 looks at the profile and behaviour of Winter Intenders by destination type. Due to insufficient base sizes at an individual level, destination types have been merged to produce the following categories:

- **Rural Intenders:** UK adults planning their next overnight UK trip to a 'countryside or village' or 'mountains or hills'
- **Coastal Intenders:** UK adults planning their next overnight UK trip to a 'traditional coastal/seaside town' or 'rural coastline'
- **City or town intenders:** UK adults planning their next overnight UK trip to a 'large city' or a 'smaller city or town'

# Definitions used within this report (2)

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

- **City intenders:** Winter Intenders planning on taking an overnight trip to a 'city or large town' in the Winter period
- **City non-intenders:** Winter Intenders not planning on taking an overnight trip to a large city or town in the Winter period

Chapter 5 looks at Winter intentions by destination region. Due to insufficient base sizes at an individual region level, destinations have been merged where necessary. The following regional definitions have been used:

- **North of England:** North West, North East, Yorkshire and The Humber
- **Midlands and South of England:** West Midlands, East Midlands, East of England, South West, South East (excluding London)
- **London (as standard)**
- **Scotland (as standard)**
- **Wales (as standard)**

# Definitions used within this report (3)

Throughout the report, 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+.

# Definitions used within this report (4)

This report also includes an additional six 'COVID 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 life-style. 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



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# 1. Winter and Spring Intenders Profile

# Groups in focus

Figure 1. Proportion anticipating going on any overnight UK trips, Percentage, November and December 2021, UK

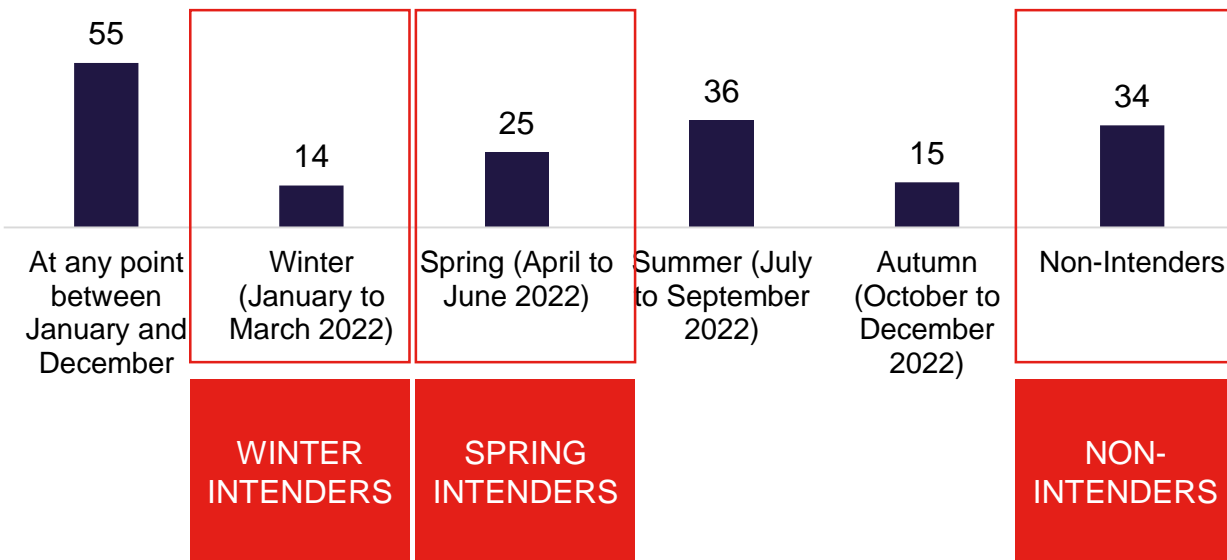
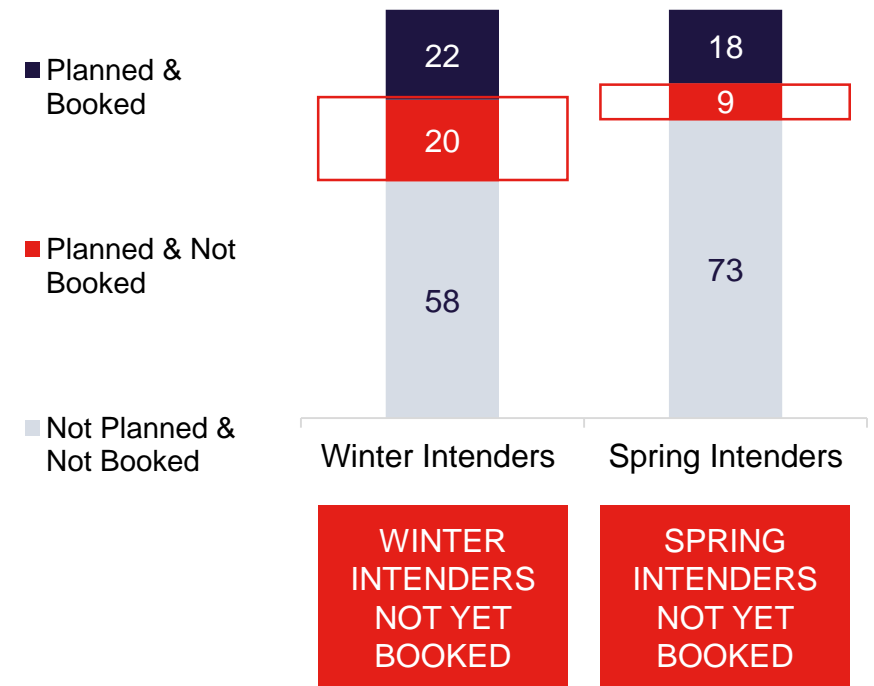


Figure 2. Proportion of Intenders that have already planned or booked their upcoming trip, Percentage, November and December 2021, UK



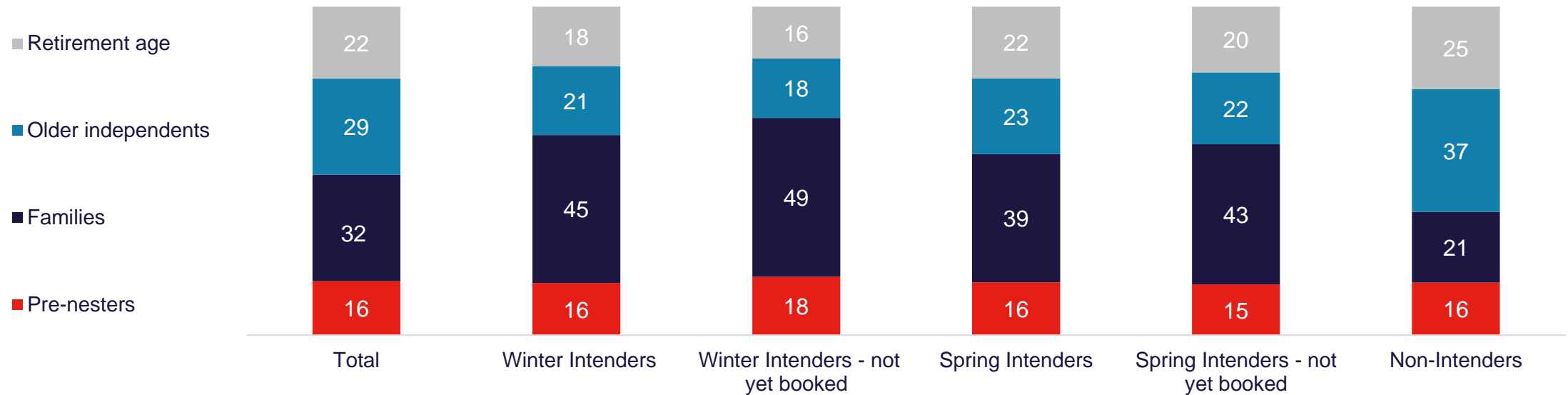
QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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. December 2021 = 1,756 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.



# Life stage by UK overnight trip intention

Compared to the total sample, Intenders have a higher proportion of Families, especially Intenders who have not booked yet. Non-Intenders over-index on Older Independents.

Figure 3. Life stage by UK overnight trip intention, Percentage, November and December, UK



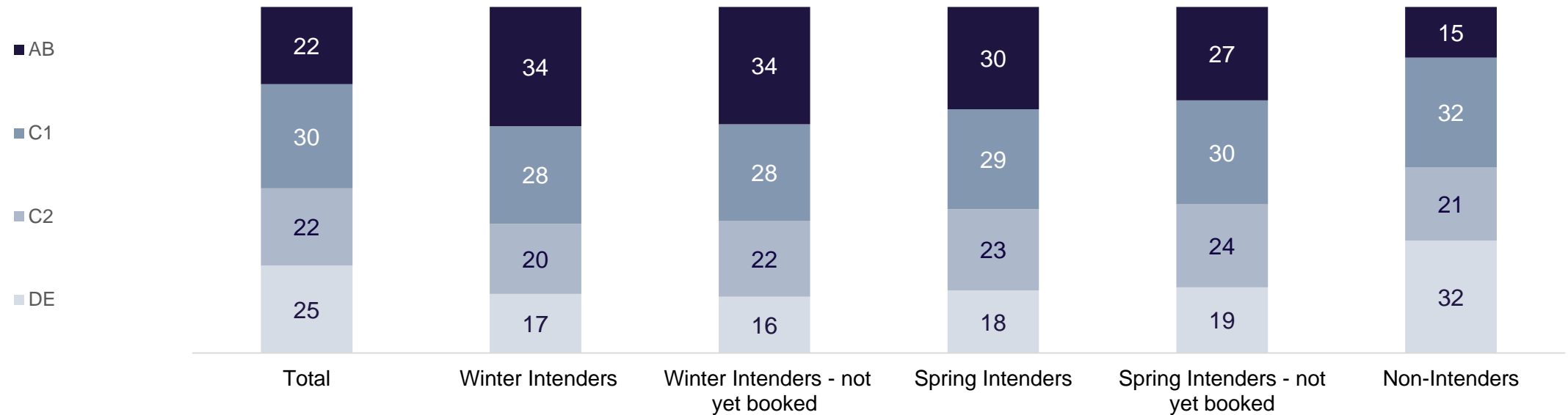
Source: Demographic questions. Life stage definitions: Pre-nesters – aged 16-34 without children in household; Families – aged 16-64 with children in household; Older independents – aged 35-64 with no children in household; Retirement age – aged 65+.

Base: Total n=3,514 Winter intenders n=507; Winter intenders – not yet booked n=330; Spring intenders n=878; Spring intenders – not yet booked n=482; non-intenders n=1,188

# Social grade by UK overnight trip intention

Both Winter and Spring Intenders are more likely than average to belong to social grades AB (34% of Winter Intenders and 30% of Spring Intenders). Non-intenders are more likely to belong to social grades DE (32% vs 25% of total).

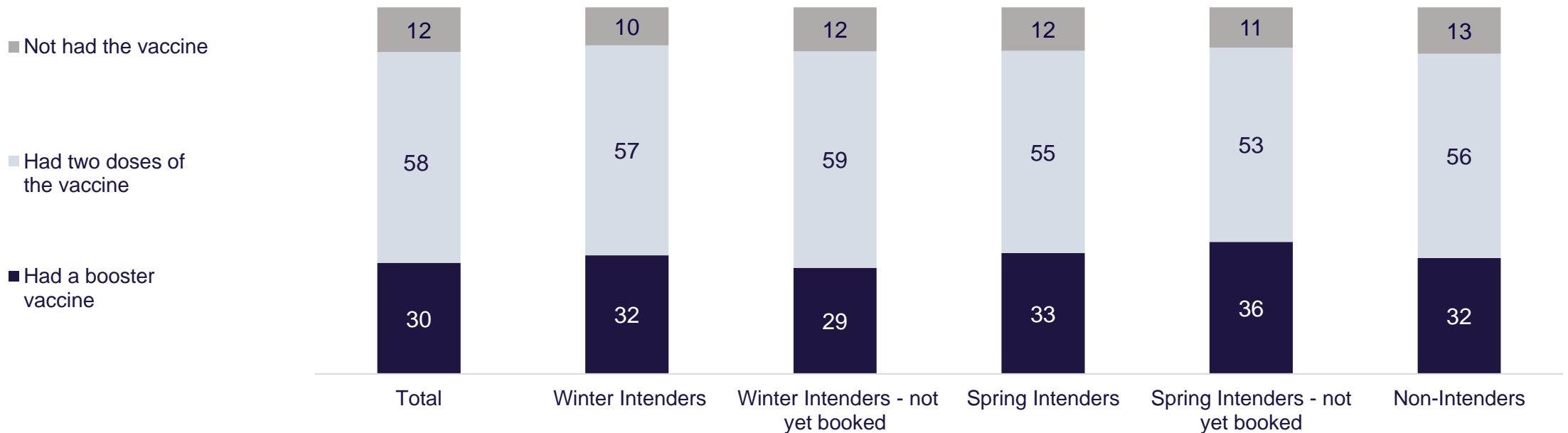
Figure 4. Social grade by UK overnight trip intention, Percentage, November and December, UK



# COVID-19 vaccination status by UK overnight trip intention

Vaccine take-up does not correlate with intention to take an overnight domestic trip – across all groups around 9 in 10 had at least two doses of the vaccine.

Figure 5. covid-19 vaccination status by UK overnight trip intention, Percentage, November and December, UK

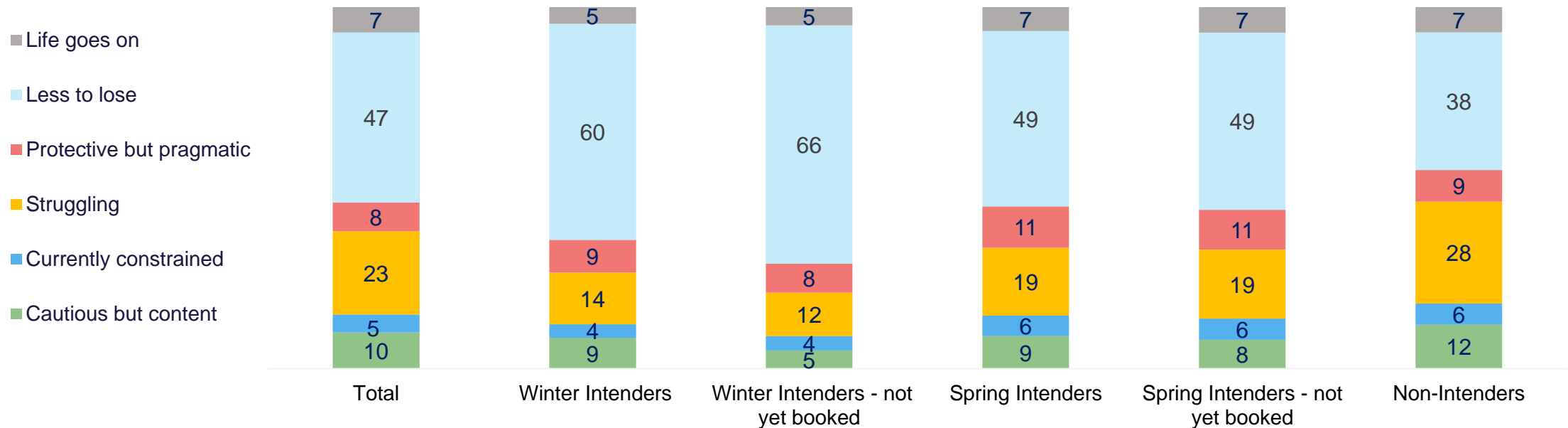


Q8a: Which of the following best describe how you feel about the COVID-19 vaccine?  
 Base: Total n=3,514 Winter intenders n=507; Winter intenders – not yet booked n=330; Spring intenders n=878; Spring intenders – not yet booked n=482; non-intenders n=1,188

# Segments by attitude to Covid-19 (see definitions page for more information)

Winter Intenders (especially those who haven't yet booked their trip) are more likely to fall into the 'Less to lose' segment – an audience that is more likely to believe people should learn to live with COVID-19.

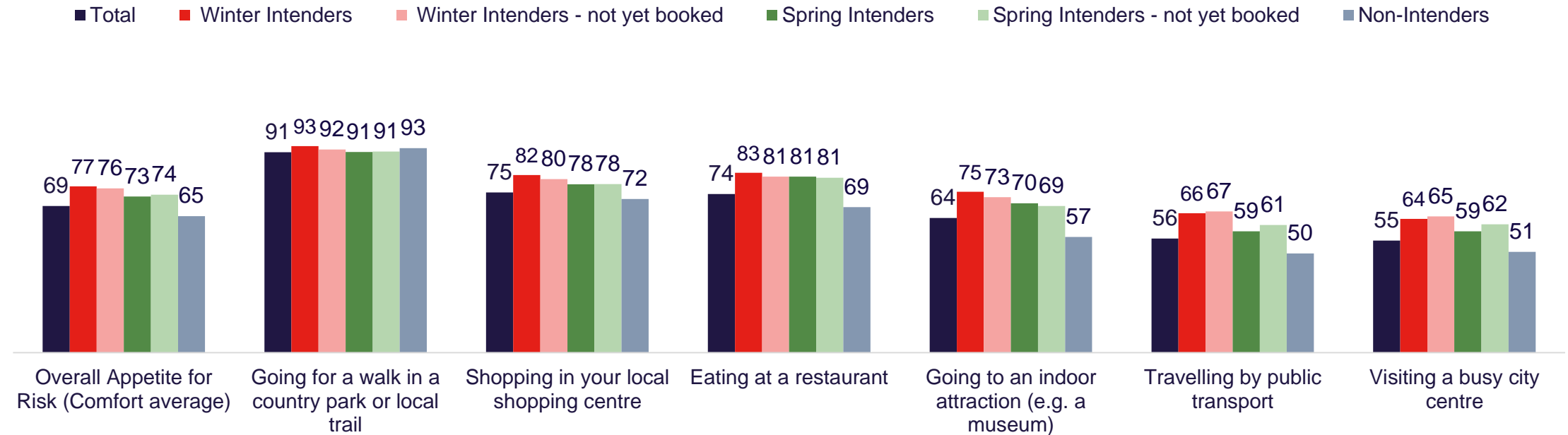
Figure 6. Segments by attitude to Covid-19 by UK overnight trip intention, Percentage, November and December, UK



# Appetite for Risk: by UK overnight trip intention

There is a strong link between level of comfort conducting everyday activities and likelihood of taking an overnight domestic trip – the overall appetite for risk score higher for Winter Intenders (77%) and Spring Intenders (74%), and lower amongst the general population (69%) and for non-intenders (65%).

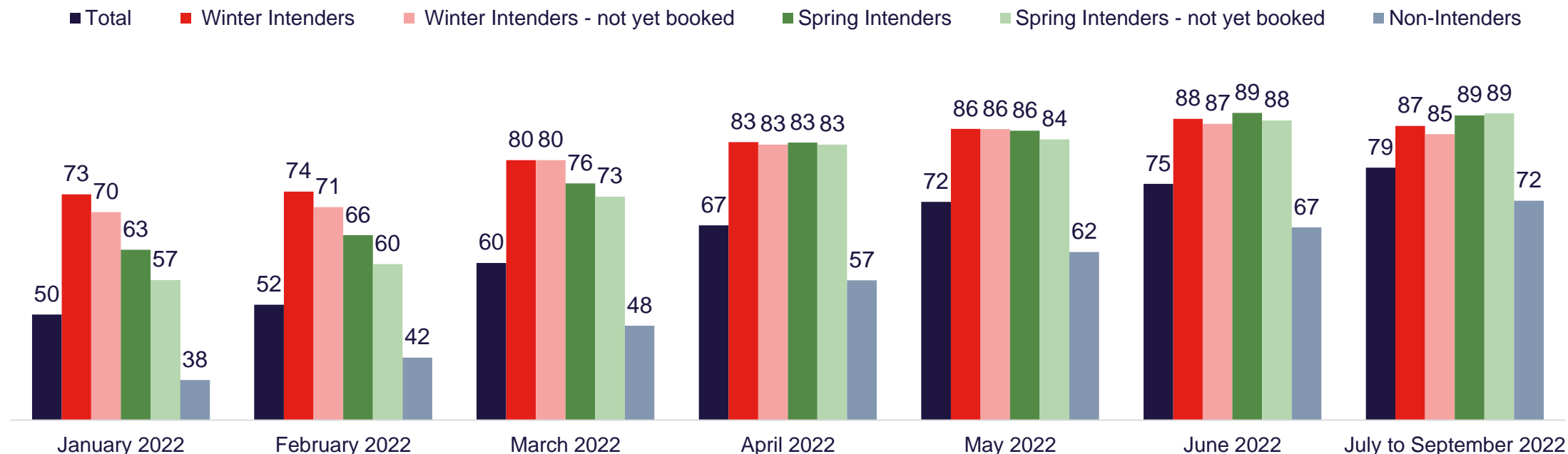
Figure 7. Level of comfort conducting a range of activities, NET very and fairly comfortable, Percentage, November and December, UK



# Confidence in the ability to take a UK short break or holiday: by UK overnight trip intention

UK intenders exhibit higher near-term confidence (January to March) that an overnight UK trip would go ahead than the general population, confidence highest amongst Winter Intenders. Intenders that have already booked their trip express more near-term confidence than intenders that are yet to book it.

**Figure 8. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, November and December, UK**

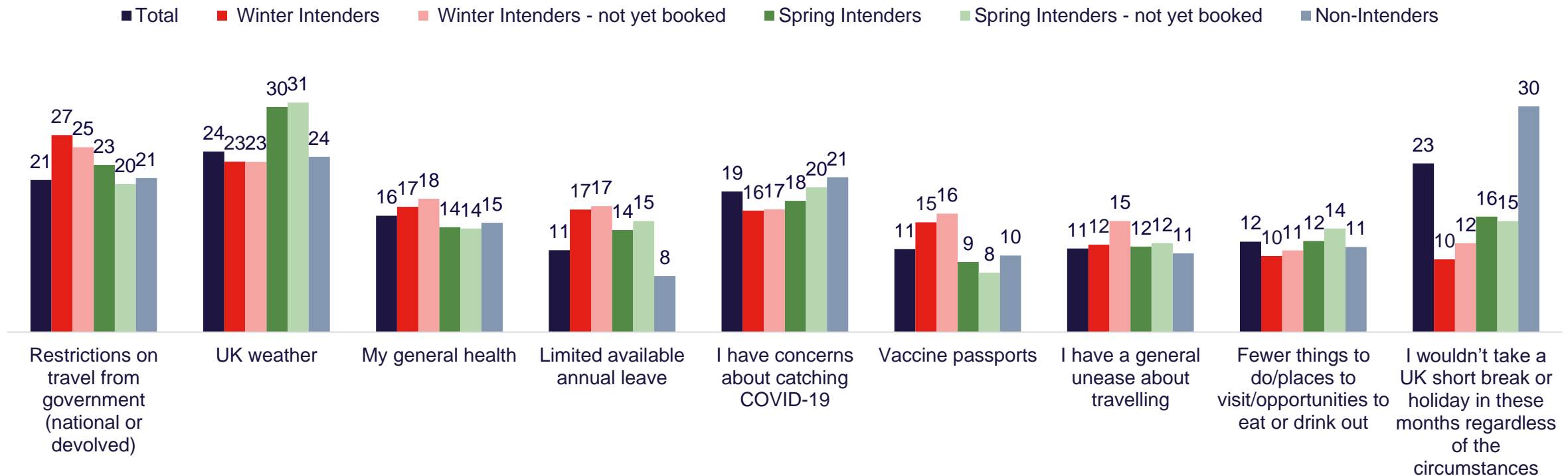


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: Total n=3,514 Winter intenders n=507; Winter intenders – not yet booked n=330; Spring intenders n=878; Spring intenders – not yet booked n=482; non-intenders n=1,188

# Perceived barriers to taking an overnight trip in the UK in Jan-Mar '22

Winter Intenders are most likely to select 'restrictions on travel from government' as a barrier to taking an overnight UK trip between January and March 2022. Spring Intenders most likely to state 'UK weather'. Concerns around catching COVID-19 is most likely to be stated by 'non-intenders'.

Figure 9. Barriers for taking an overnight UK trip in January to March 2022, Percentage, November and December 2021, UK

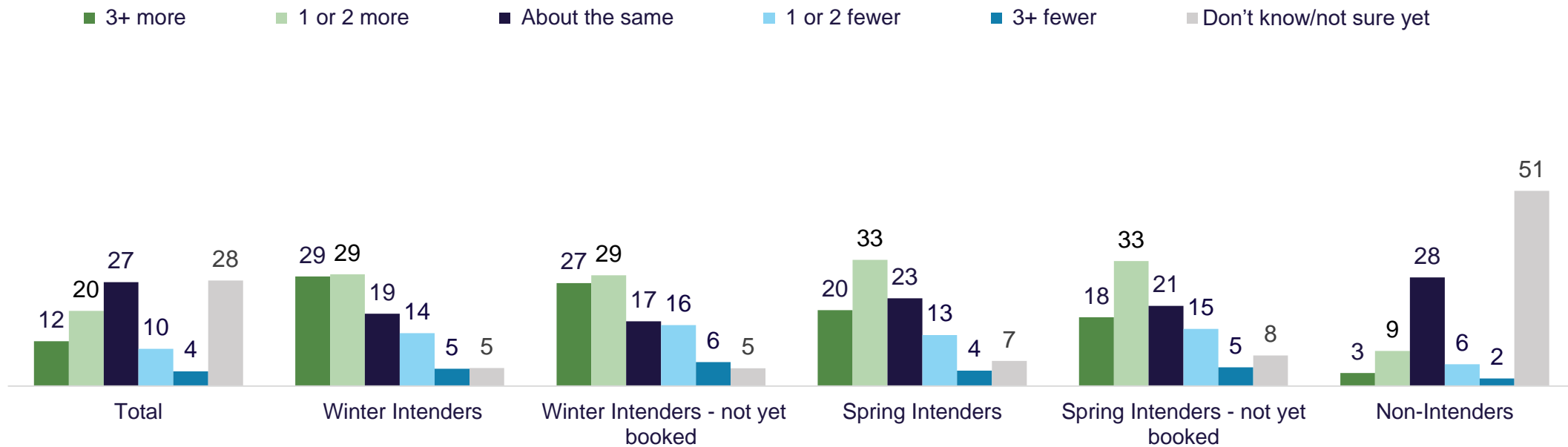


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: Total n=3,514 Winter intenders n=507; Winter intenders – not yet booked n=330; Spring intenders n=878; Spring intenders – not yet booked n=482; non-intenders n=1,188

# Relative number of UK trips in next 12 months by UK overnight trip intention

Winter Intenders and Spring Intenders are set to take more UK overnight trips in the next 12 months than they did in the past 12 months. However, Spring Intenders are slightly more cautious. Over half of 'non-intenders' (51%) are still unsure.

Figure 10. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, November and December 2021, UK







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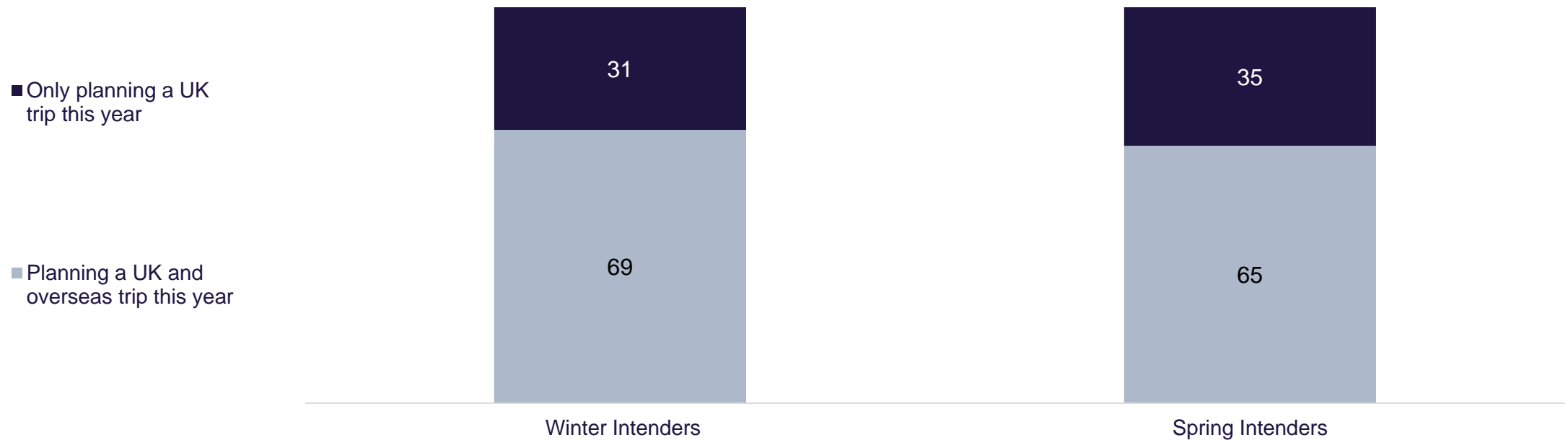
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## 2. Trip Intentions for Winter & Spring

# UK and overseas overnight trip planning

69% of UK Winter Intenders and 65% of UK Spring Intenders are also planning a trip overseas this year.

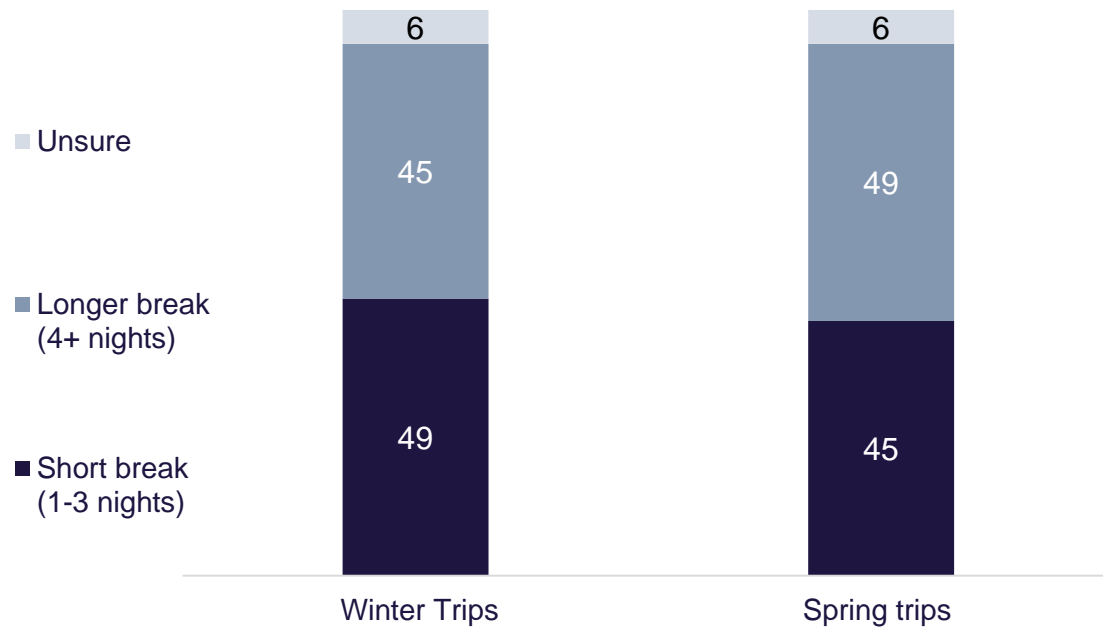
Figure 11. UK only trip intentions versus UK and overseas trip intention, November and December, Percentage, UK



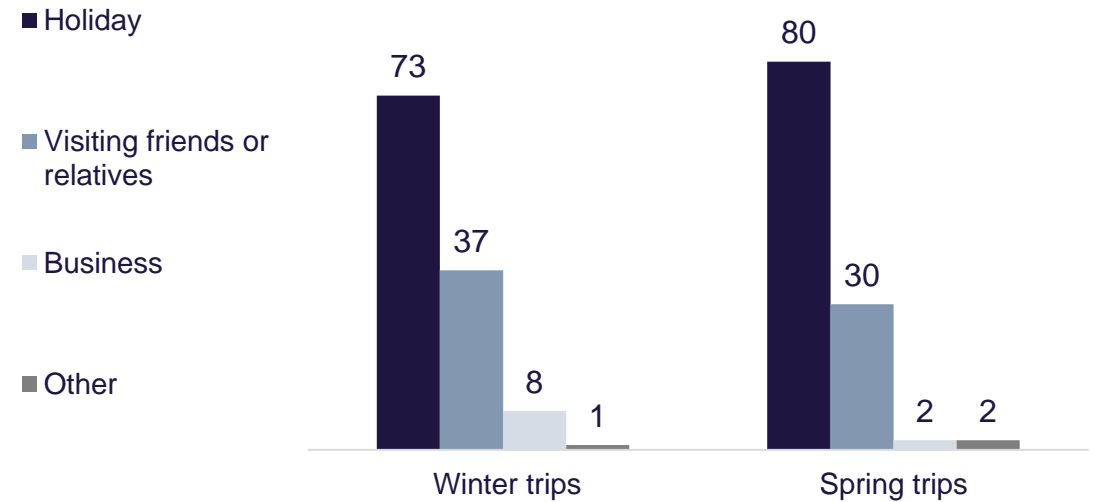
# Duration and purpose of next UK overnight trip

Both Winter and Spring trips are relatively evenly split between short breaks (of 1-3 nights) and longer breaks (of 4+ nights). Holiday is the most dominant leisure purpose, followed by visiting friends or family.

**Figure 12. Duration of next UK overnight trip, Percentage, November and December, UK**



**Figure 13. Purpose of next UK overnight trip, Percentage, November and December, UK**



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? VB6f. And which of the following best describes the purpose of this trip?

Base: Winter Intenders n=412; Spring Intenders n=585. \*This question only takes into account 'next trip' so figures in latter months do not take into account the trip plans of the minority of Winter Intenders who are also planning on taking a Spring trip

# Destination region of next UK overnight trip

London is the UK destination most likely to generate visitors amongst Winter Intenders, the South West of England the most popular amongst Spring Intenders.

Figure 14. Destination region of next UK overnight trip for Winter Intenders, Percentage, November and December, UK

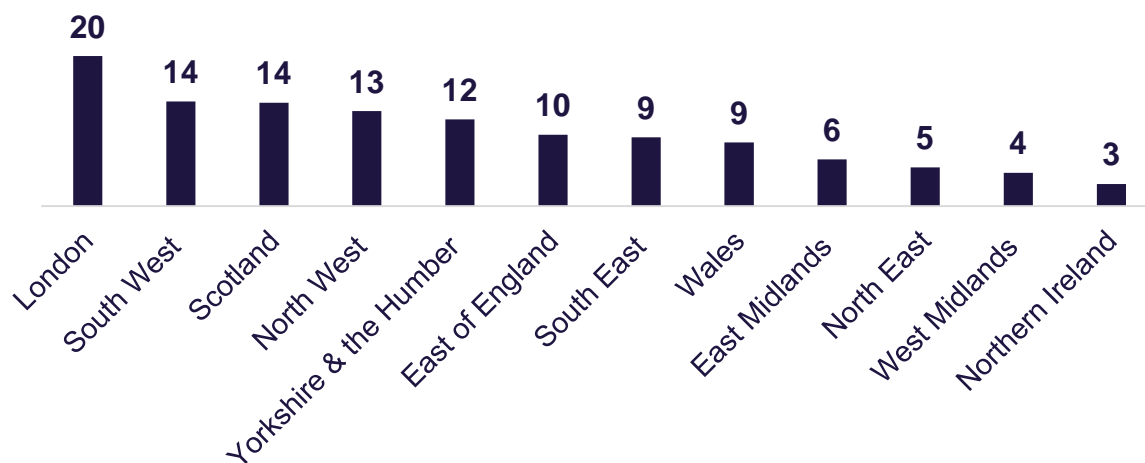
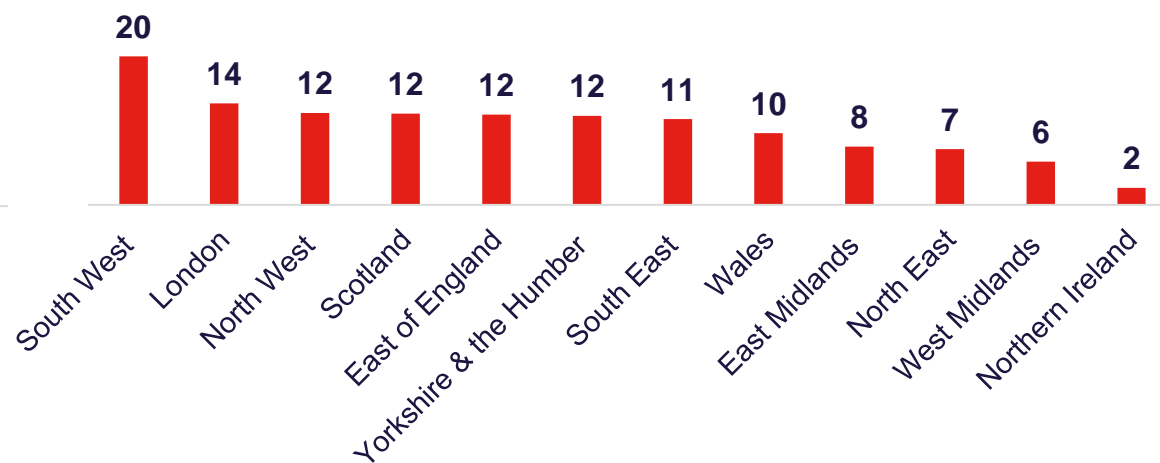


Figure 15. Destination region of next UK overnight trip for Spring Intenders, Percentage, November and December, UK



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; Winter Intenders n=412; Spring Intenders n=585

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

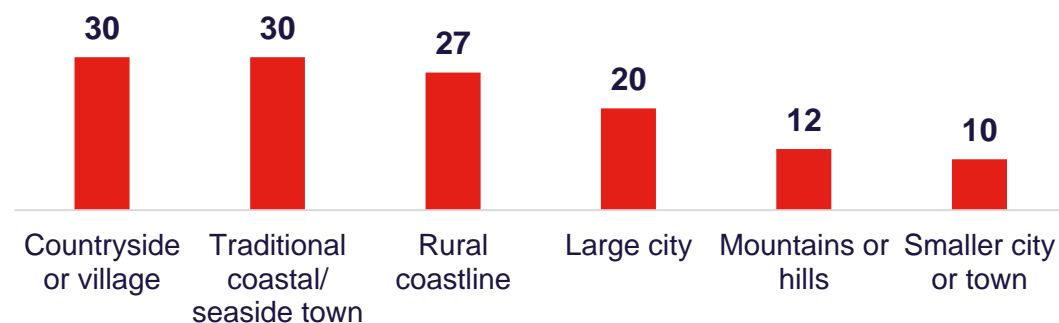
# Destination type for next UK overnight trip

For Winter Intenders, the most preferred destination is 'Countryside or village' (31%), followed by 'large city' (25%) and 'traditional coastal/seaside town' (22%). For Spring Intenders, the top destination is the same, 'Countryside or village' (30%), although equally chosen with 'traditional coastal/seaside town' (30%).

Figure 16. Main type of destination for Winter Intenders, Percentage, November, UK



Figure 17. Main type of destination for Spring Intenders, Percentage, November, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?

Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=178; Spring Intenders n=286

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

# Trip-taker party make-up for next UK overnight trip

Consistent with previous reporting in this Tracker, time of their trip is having no effect on party make-up as ranking is consistent throughout seasons, 6 in 10 are planning to go with their partner and around a third with their children.

Figure 18. Trip taker party make-up for Winter Intenders, Percentage, November and December, UK

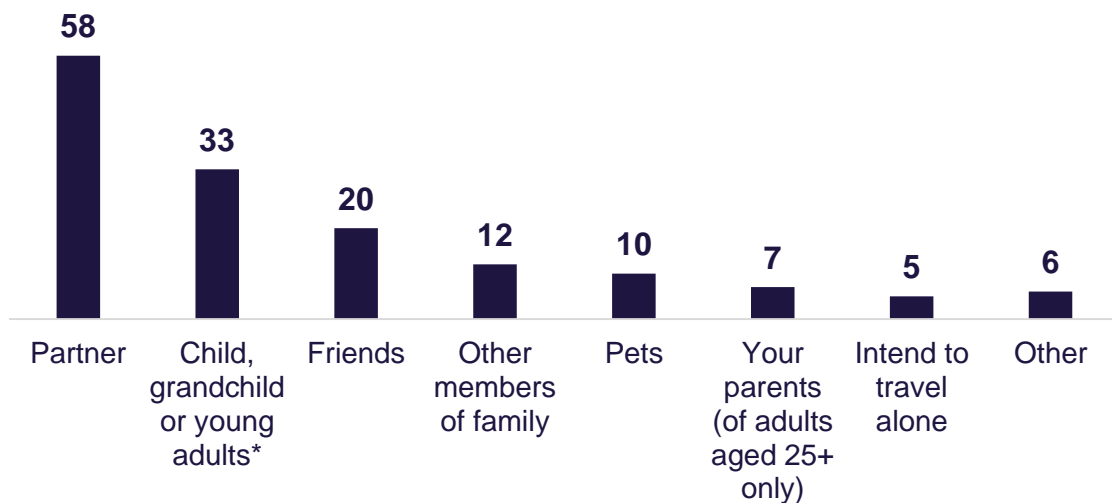
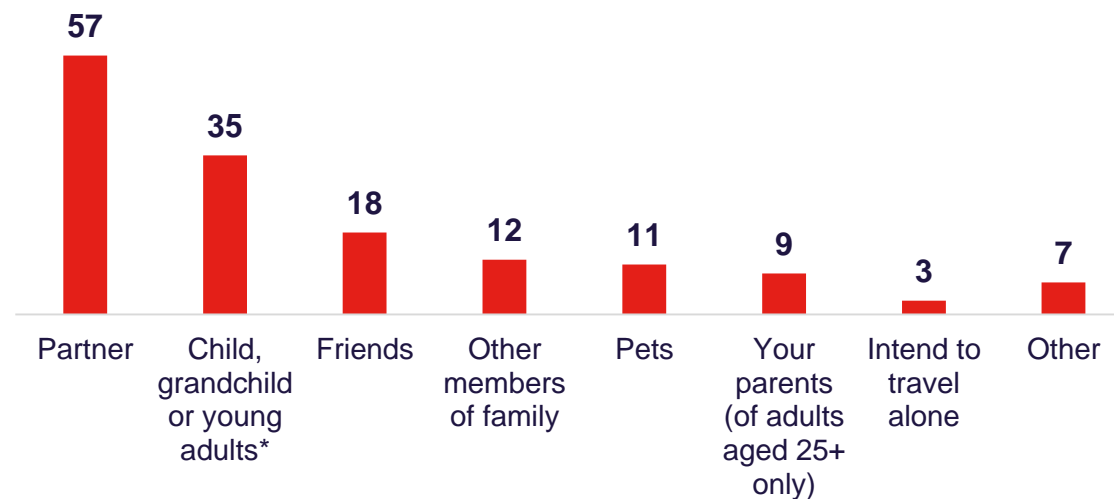


Figure 19. Trip taker party make-up for Spring Intenders, Percentage, November and December, UK



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; Winter Intenders n=412; Spring Intenders n=585

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

\*Young adults is defined as 16-24 year olds stating they are travelling with their parents

# Accommodation type for next UK overnight trip

Winter Intenders are most likely to stay in 'Commercial rental' (49%) and 'a private home' (45%). Amongst Spring Intenders, 'caravan/camping' is the leading choice (43%), followed by 'commercial rental' (41%), and 'hotel/motel/inn' (41%).

Figure 20. Accommodation type for next UK overnight trip for Winter Intenders, Net Percentage, November and December, UK

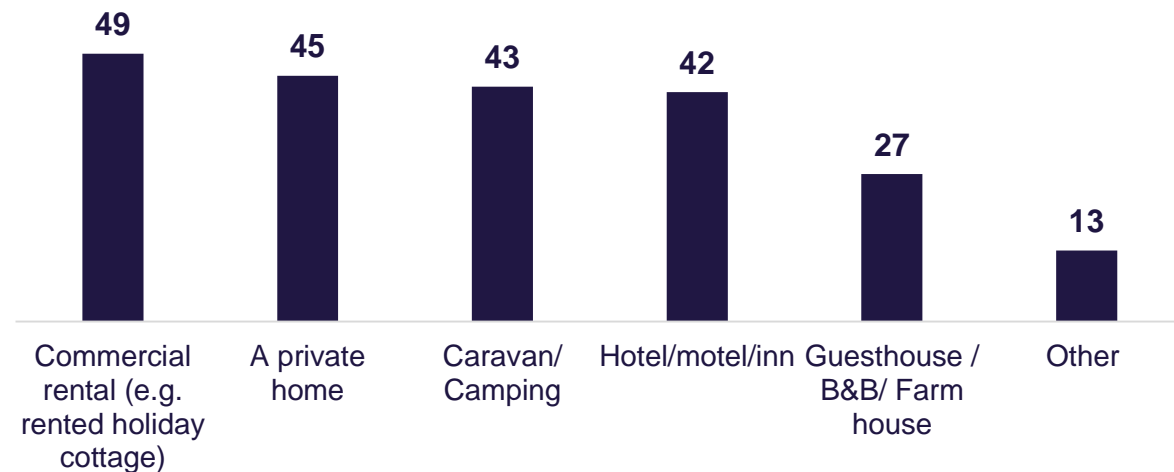
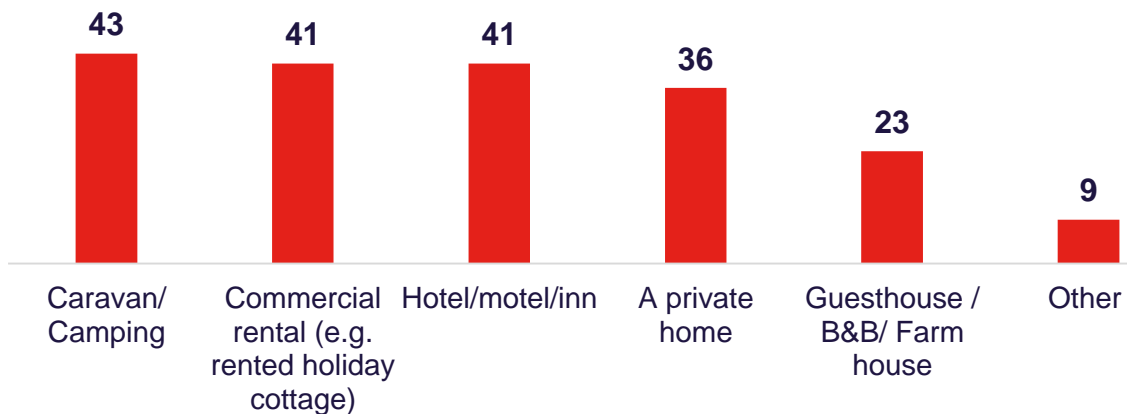


Figure 21. Accommodation type for next UK overnight trip for Spring Intenders, Net Percentage, November and December, UK



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; Winter Intenders n=412; Spring Intenders n=585

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.



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## **3. Winter Intenders**

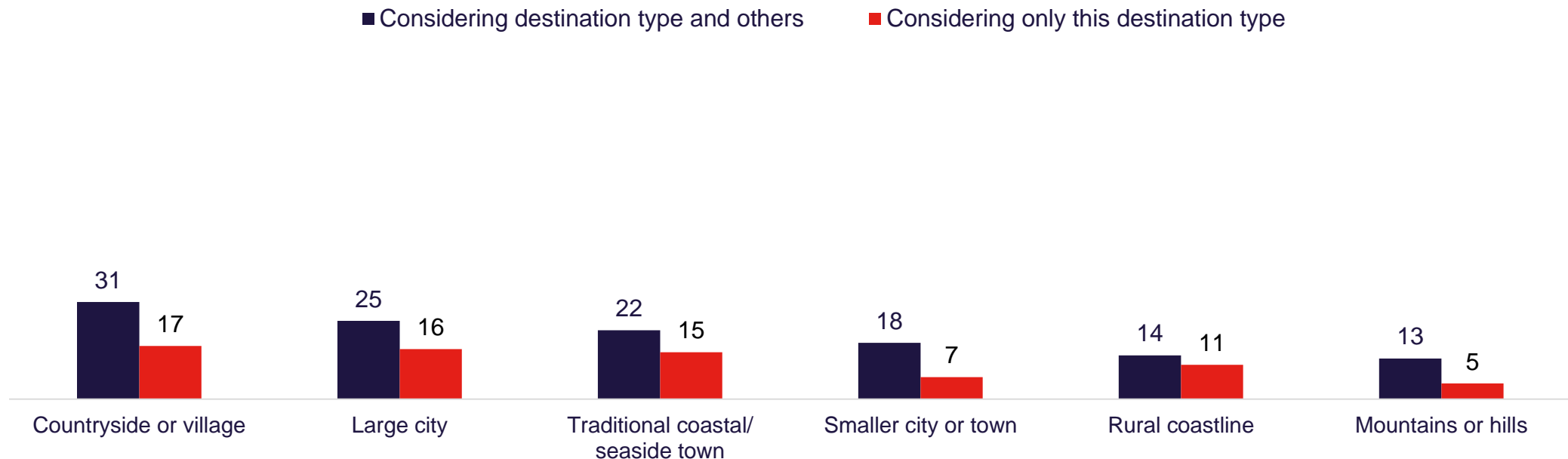
### **Profile by Destination Type**



# Destination types for next UK overnight trip(s) in Winter

Many Winter Intenders are considering more than one destination type. For example, 31% are planning to go to a countryside in Jan-Mar '22, out of which 17% planning to stay only in countryside and remaining 14% plan to stay in other destination too.

Figure 22. Main Destination Type of Intended Winter Trip, Percentage, November, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?  
Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=862 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

# Destination types for next UK overnight trip(s) in Winter

For Winter Intenders considering staying in a coastal town, rural coastline or mountains, their most common secondary destination is countryside.

**Table 1. Destination types also considered for Winter Trips, Percentage, November, UK, (Read chart vertically)**

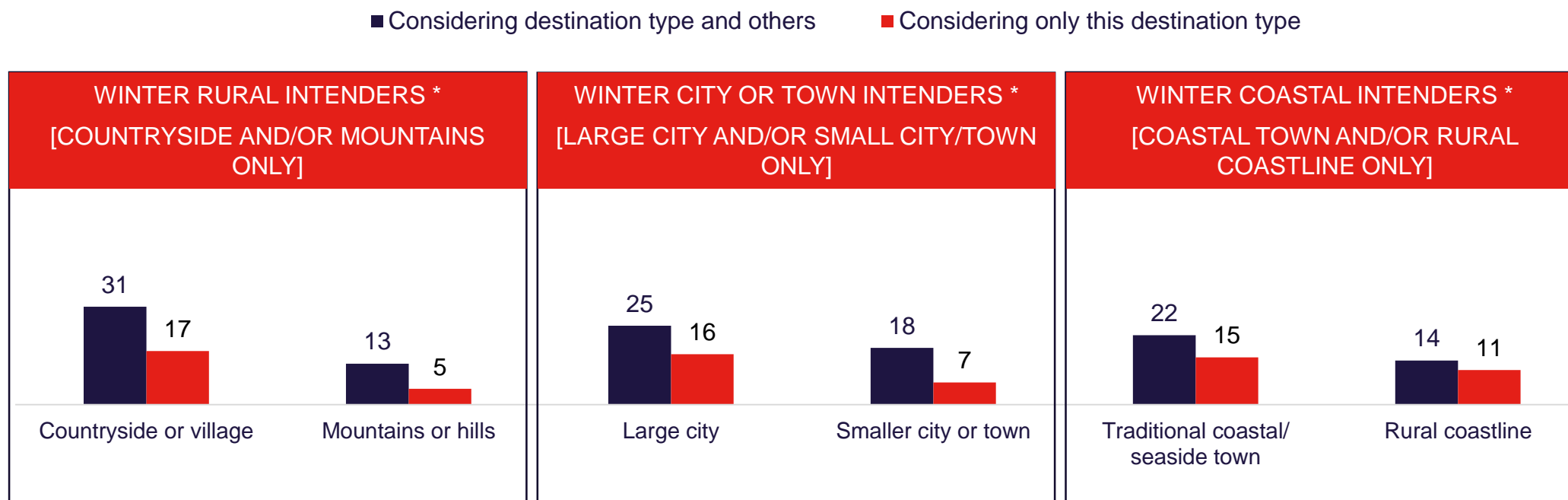
Column %	Traditional coastal/ seaside town	Country-side or village	Rural coastline	Smaller city or town	Large city	Moun-tains or hills
Traditional coastal/ seaside town		19%	29%	27%	11%	21%
Countryside or village	27%		34%	26%	10%	45%
Rural coastline	19%	16%		14%	3%	16%
Smaller city or town	23%	15%	17%		9%	11%
Large city	13%	8%	6%	12%		7%
Mountains or hills	20%	30%	23%	13%	6%	

QVB5a. Which of the following best describes the main types of destinations you are likely to stay in during your UK trip?  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=862 Note: Multiple choice question.  
 Totals may exceed 100% as some respondents anticipate to go on more than one trip and/or stay in more than one type of destination.

# Destination types for next UK overnight trip(s) in Winter

Destinations we will be looking at in this sections are: Winter Rural Intenders, Winter City or town Intenders and Winter Coastal Intenders.

Figure 22. Main Destination Type of Intended Winter Trip, Percentage, November, UK



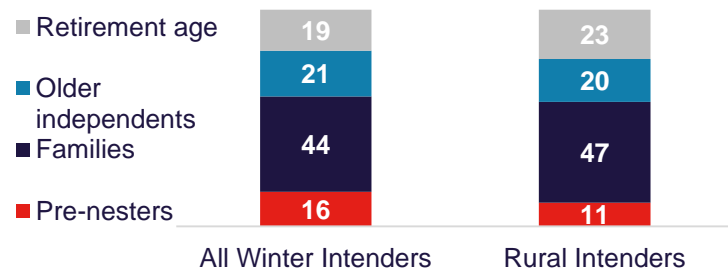
\* For further analysis, the destinations types were merged due to insufficient base sizes at an individual level.

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=862 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

# Winter Rural Intenders\* (35% share)

Winter Intenders planning a trip to rural destinations are more likely than all Winter Intenders to be retirees and to be less comfortable with everyday activities. They are significantly more likely to be planning on staying in 'commercial rental'.

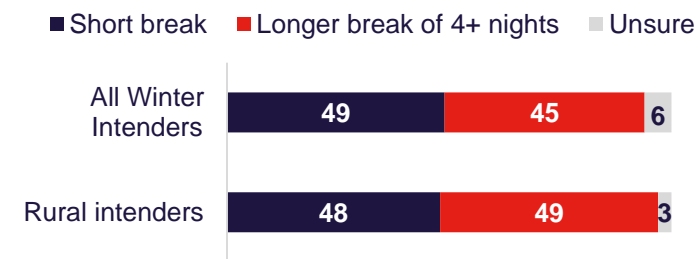
**Figure 23. Life Stage of Winter Intenders, Percentage, November and December, UK**



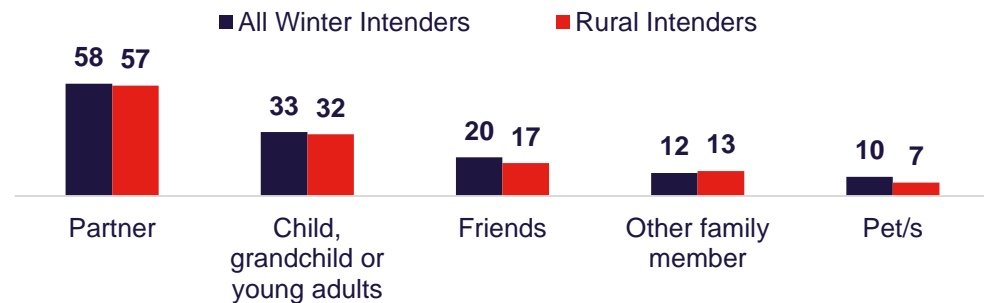
**Figure 24. Average comfort level conducting everyday activities, NET very and fairly comfortable, November and December, UK**



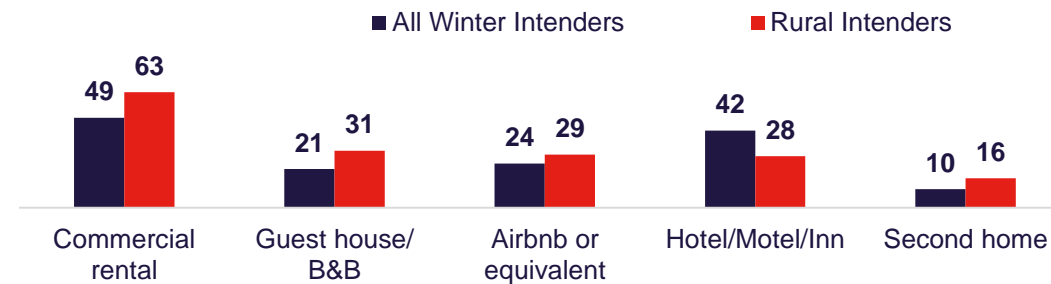
**Figure 25. Trip Duration of Intended Winter Trip, Percentage, November and December, UK**



**Figure 26. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, November and December, UK**



**Figure 27. Accommodation Type of Intended Winter Trip, Top 5, Percentage, November and December, UK**

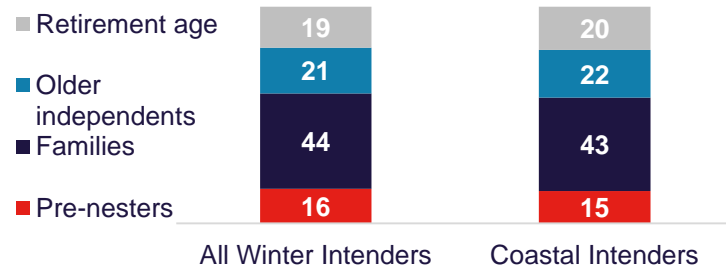


\*'Countryside or village' and 'Mountains or Hills' merged due to low base sizes  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=412; Base for life stage chart: All rural intenders (plan on an overnight trip to either a countryside or village or mountains or hills) n=147 ; Base for all other charts: Only rural intenders (only plan on an overnight trip to either a countryside or village or mountains or hills) n=123.

# Winter Coastal Intenders\* (34% share)

Winter Coastal Intenders' life stage profile is in line with all Winter Intenders. They are more likely to go on their winter coastal trip with their partner and go for a longer break of 4+ nights.

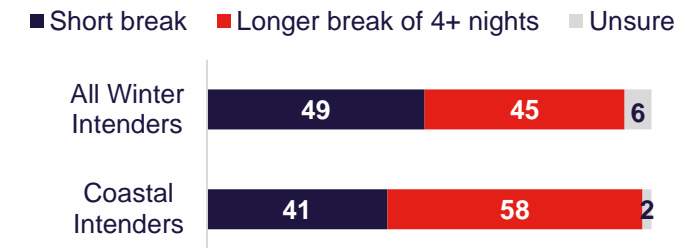
**Figure 33. Life Stage of Winter Intenders, Percentage, November and December, UK**



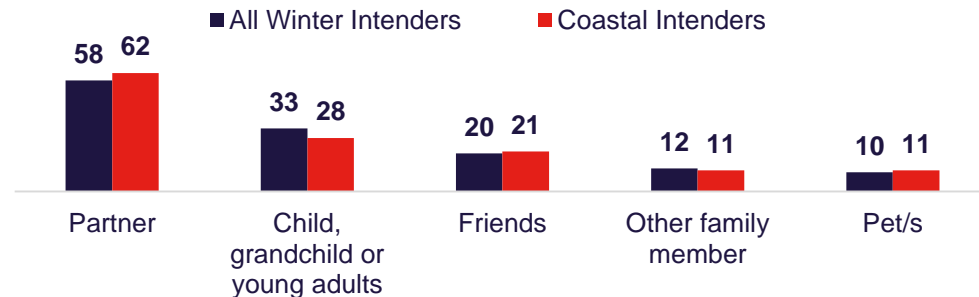
**Figure 34. Average comfort level conducting everyday activities, NET very and fairly comfortable, November and December, UK**



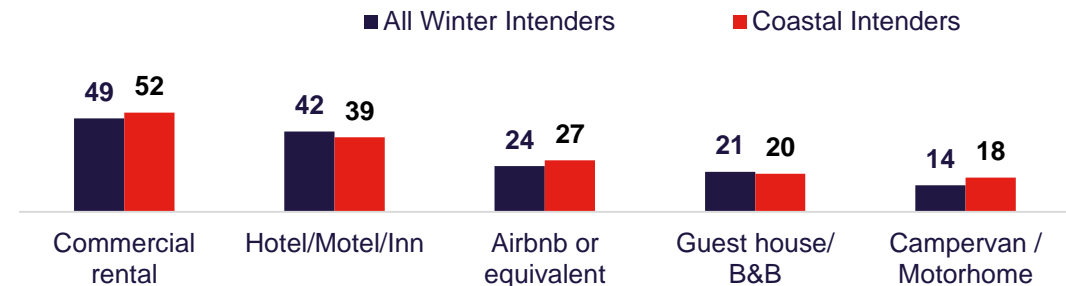
**Figure 35. Trip Durations of Intended Winter Trip, Percentage, November and December, UK**



**Figure 36. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, November and December, UK**



**Figure 37. Accommodation Type of Intended Winter Trip, Top 5, Percentage, November and December, UK**



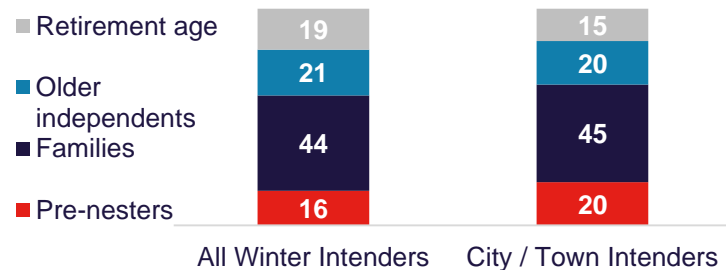
\*Traditional coastal/seaside town' or 'Rural Coastline' merged due to low base sizes

Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=412; Base for life stage chart: All coastal intenders (plan on an overnight trip to either 'Traditional coastal/seaside town' or 'Rural Coastline') n=134 ; Base for all other charts: Only coastal intenders (only plan on an overnight trip to either 'Traditional coastal/seaside town' or 'Rural Coastline' ) n=108.

# Winter City / Town Intenders\* (34% share)

Winter Intenders planning an overnight trip to a City or Large Town tend to be younger than all Winter Intenders, and are more comfortable with everyday activities. Their trips are more likely to be short breaks of 1-3 nights, and spent staying in a 'hotel/motel/inn'.

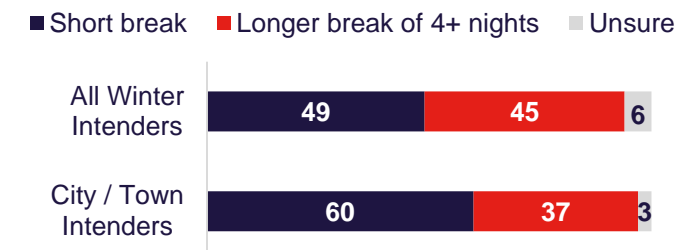
**Figure 28. Life Stage of Winter Intenders, Percentage, November and December, UK**



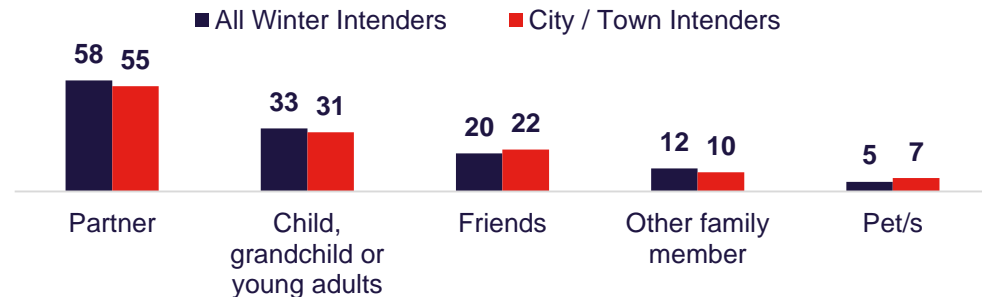
**Figure 29. Average comfort level conducting everyday activities, NET very and fairly comfortable, November and December, UK**



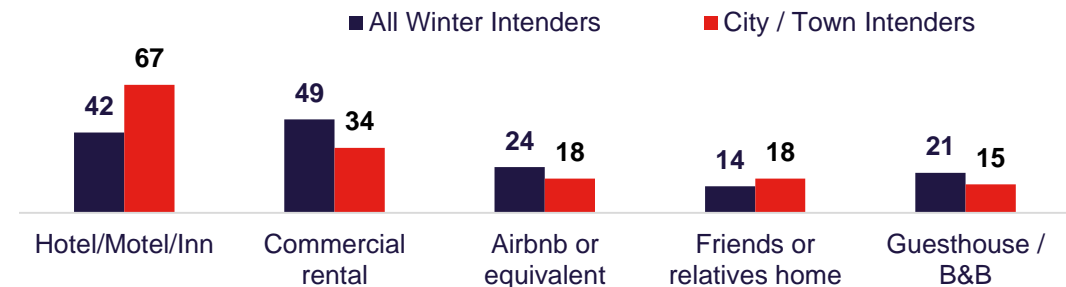
**Figure 30. Trip Duration of Intended Winter Trip, Percentage, November and December, UK**



**Figure 31. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, November and December, UK**



**Figure 32. Accommodation Type of Intended Winter Trip, Top 5, Percentage, November and December, UK**



\*'Large city' and 'Smaller city or town' merged due to low base sizes  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=412; Base for life stage chart: All City intenders (plan on an overnight trip to either 'Large city' and 'Smaller city or town') n=146 ; Base for all other charts: Only City intenders (only plan on an overnight trip to either 'Large city' and 'Smaller city or town') n=125.



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## **4. Winter Intenders**

**Focus on City intenders**

# Destination region of next UK overnight trip in a city or large town

London is the leading destination for 'city or large town' trips, followed by Scotland and the North West of England.

Figure 38. Destination region of next UK overnight trip in a city or large town for Winter Intenders, Percentage, November and December, 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; City intenders n=125

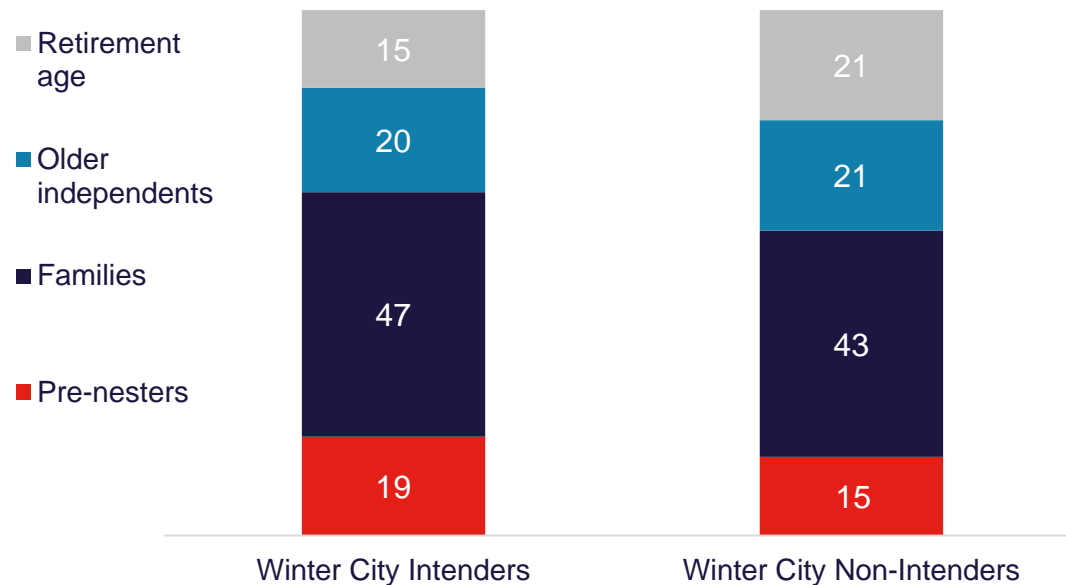
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.



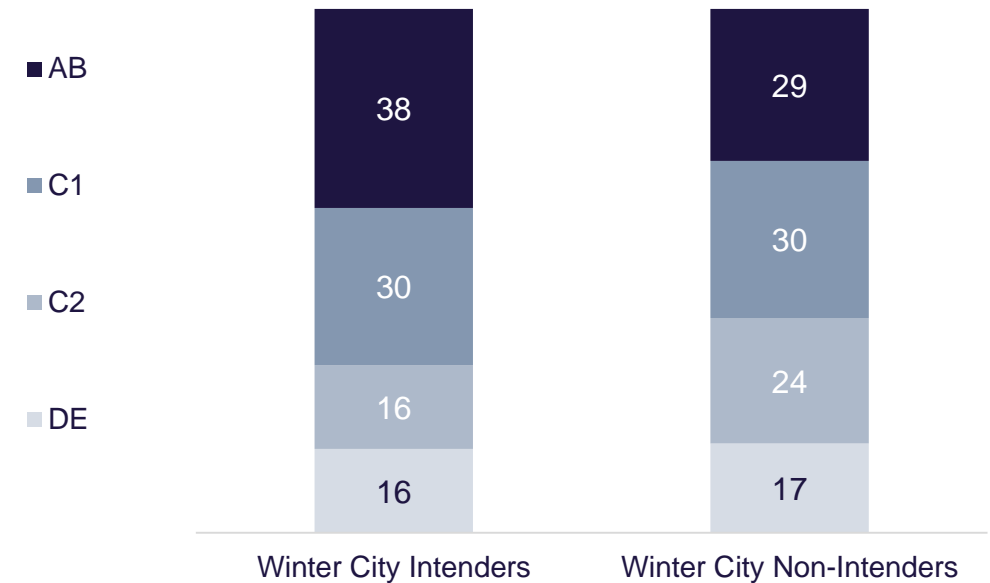
# Demographics of Winter City Intenders

Winter City Intenders have a higher proportion, than Winter City Non-Intenders, of the ‘younger’ life stages such as Pre-nesters and Families, and higher social grades.

**Figure 39. Life Stage of Winter Intenders, Percentage, November and December, UK**



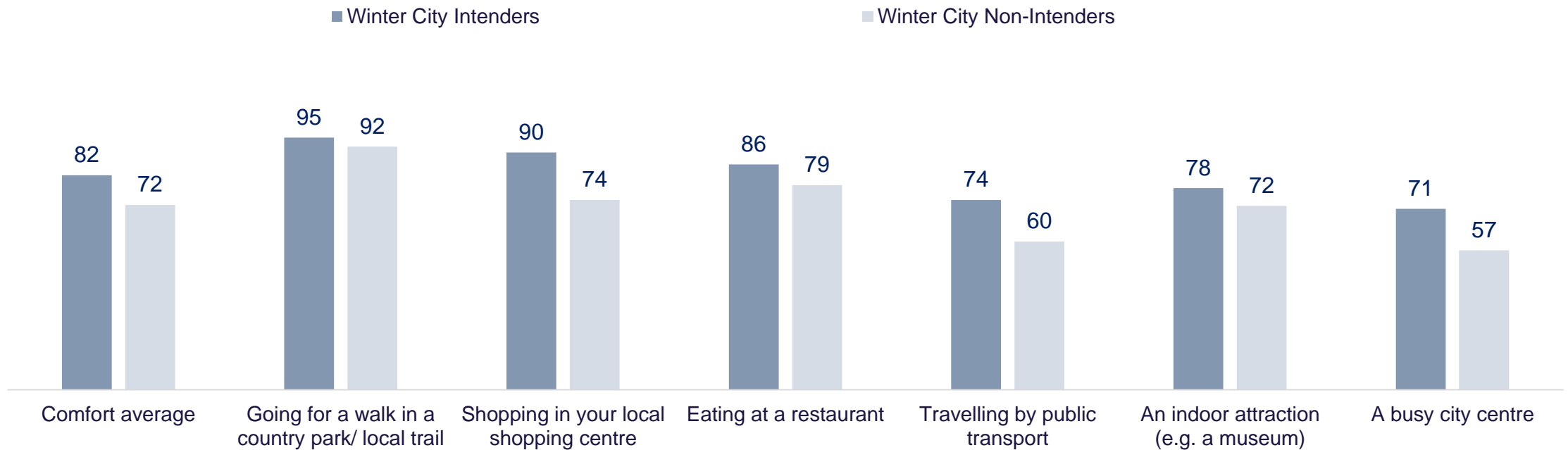
**Figure 40. Social Grade of Winter Intenders, Percentage, November and December, UK**



# Level of comfort undertaking activities of Winter City Intenders

Winter City Intenders are more comfortable with a range of everyday activities, than Winter City Non-Intenders'. In particular, with 'shopping in your local shopping centre', 'travelling by public transport' and being in 'a busy city centre'.

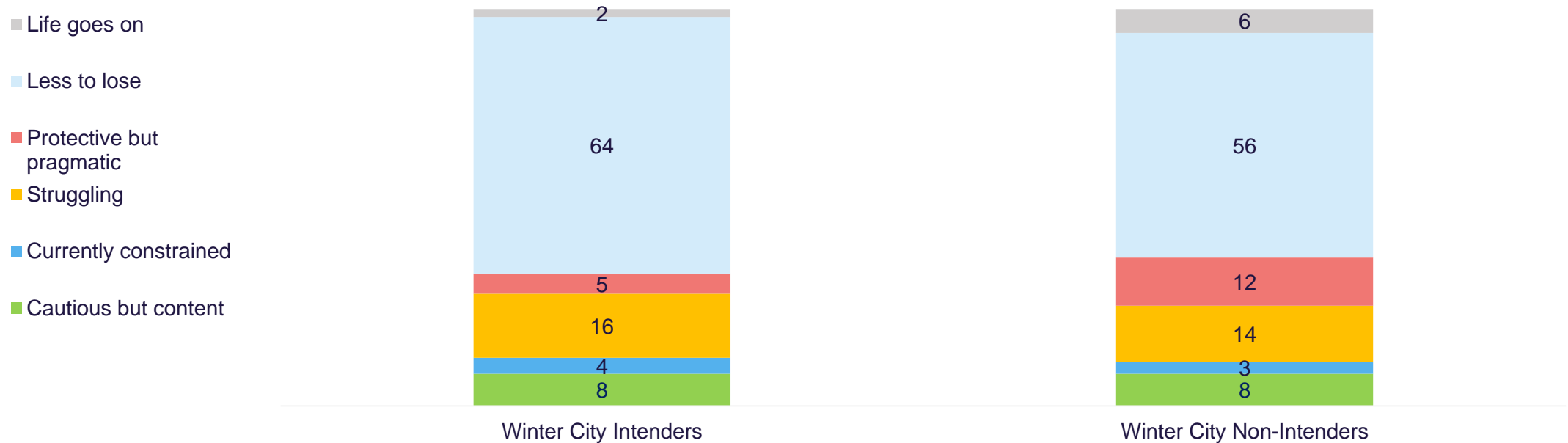
Figure 41. Level of comfort conducting activities, NET very and fairly comfortable, Percent, November and December, UK



# Segments by attitude to Covid

The more COVID-confident 'less to lose' segment has higher representation amongst Winter City Intenders than the general population and Winter City Non-Intenders.

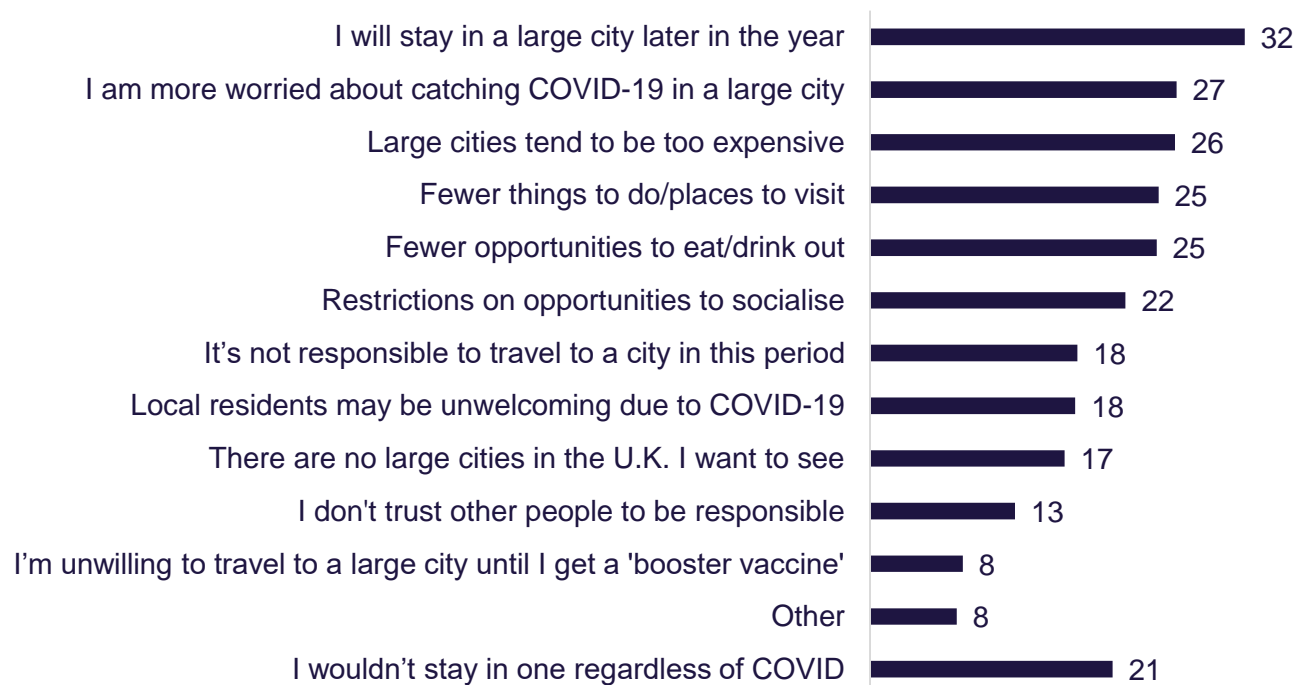
Figure 42. Breakdown of population by COVID segments by life stage, Percentage, November and December, UK



# Reasons for not taking a trip to a city in Winter

Apart from planning to stay in a city later in the year, the main reasons given for not planning on staying in a large city in winter are 'concerns around catching COVID-19' (27%) and 'large cities tend to be too expensive' (26%). The next three reasons are around limited opportunities to enjoy a city.

Figure 43b: Reasons for not staying in a large city amongst Winter Trip Intenders, Percentage, November and December, UK



# Reasons for not taking a trip to a city in Winter – by life stage

‘Concerns around catching COVID-19’ is the top barrier to visiting a city for Older Independents and Retirees. While the top two barriers for Families are limited opportunities to enjoy the city during this winter.

Tables 2-5. Top 5 Reasons for not taking a trip to a large city in Winter – by life stage, Percentage, November and December, UK

Pre-Nesters		Families		Older Independents		Retirees	
Local residents may be unwelcoming due to COVID-19	34%	Fewer opportunities to eat/drink out	38%	I am more worried about catching COVID-19 in a large city	35%	I am more worried about catching COVID-19 in a large city	30%
I will stay in a large city later in the year	33%	Fewer things to do/places to visit	37%	Restrictions on opportunities to socialise	28%	I will stay in a large city later in the year	30%
Fewer things to do/places to visit	32%	I will stay in a large city later in the year	36%	I will stay in a large city later in the year	27%	Restrictions on opportunities to socialise	28%
Large cities tend to be too expensive	31%	Large cities tend to be too expensive	32%	There are no large cities in the UK I want to see	26%	I wouldn't stay in one regardless of COVID	26%
Restrictions on opportunities to socialise	28%	It's not responsible to travel to a city in this period	32%	Large cities tend to be too expensive	22%	I don't trust other people to be responsible	25%

# Required conditions for indoor leisure/ tourism providers (how to reassure Winter City Non-Intenders)

As many 'winter city' activities are indoors, Winter City Non-Intenders need to be reassured and require indoor leisure and tourism providers to have in place mainly free cancellation, followed by a list of precautionary measures, incl. face masks, enhanced cleaning, sanitizers and distancing.

**Figure 43a. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Required by Winter City Non-Intenders, Percentage, November and December 2021**



Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: Winter City Non-Intenders n=266



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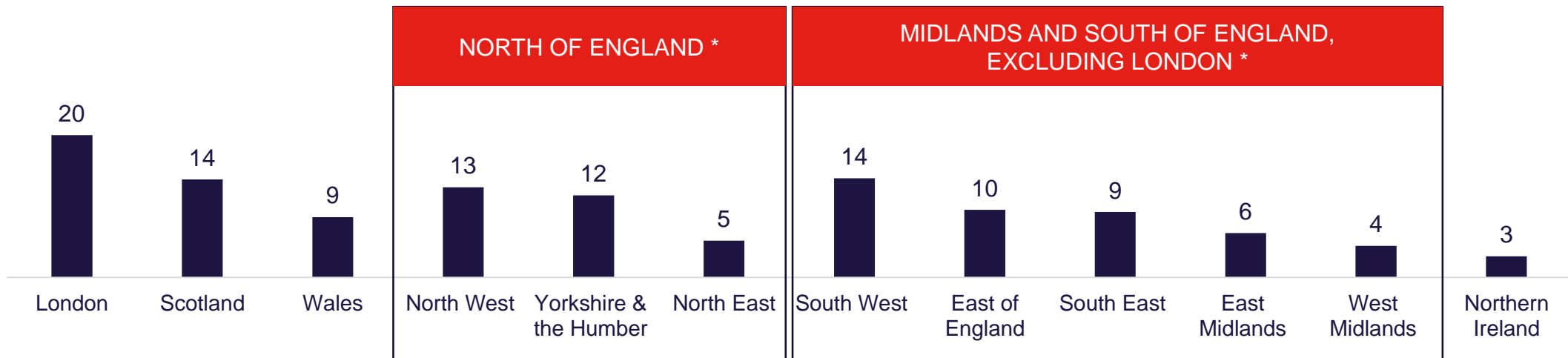
## **5. Winter Intenders**

### **Profile by Destination Region**

# Destination regions for next Winter short break or holiday

Regions, we will be looking at in this sections are: England, Scotland, Wales, North of England, Midlands & South of England (excl. London), and London.

Figure 44. Next UK overnight trip destination region for Winter Intenders, Percentage, November and December, UK



\* For further analysis, these destinations regions have been merged due to insufficient base sizes at an individual region level.

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; Winter Intenders n=383

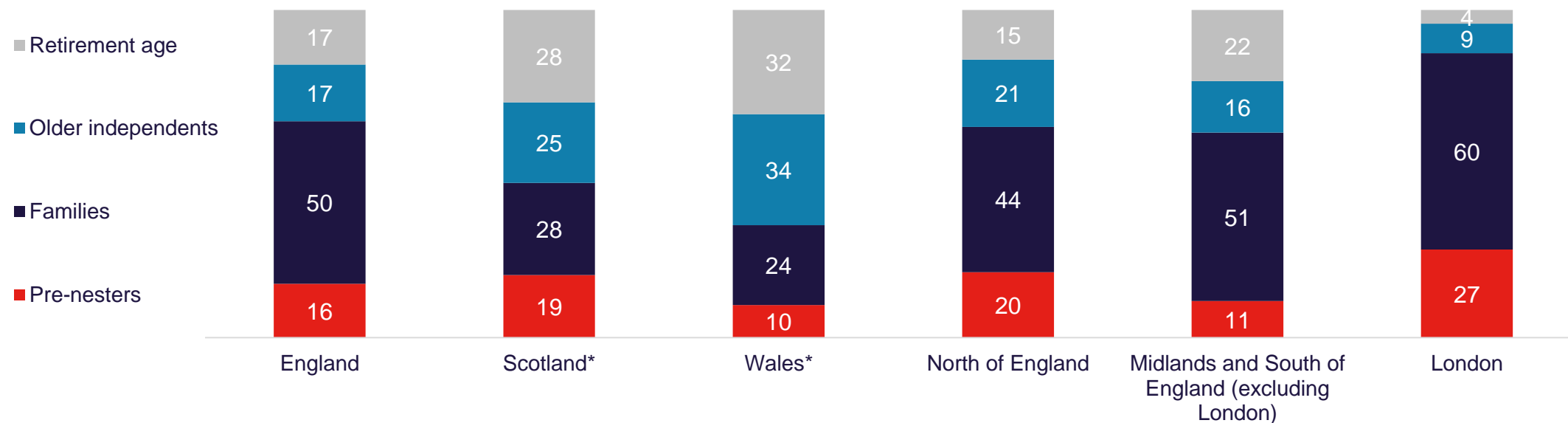
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.



# Winter Intenders' life stage - by destination region

There are some notable variations in life stage representation by destination amongst Winter Intenders – London intenders are the most likely to be ‘Pre-nesters’ and ‘Families’, Wales Intenders the most likely to be ‘Retirees’ or ‘Older independents’.

Figure 45. Life stage of Winter Intenders by destination region, Percentage, November and December, UK

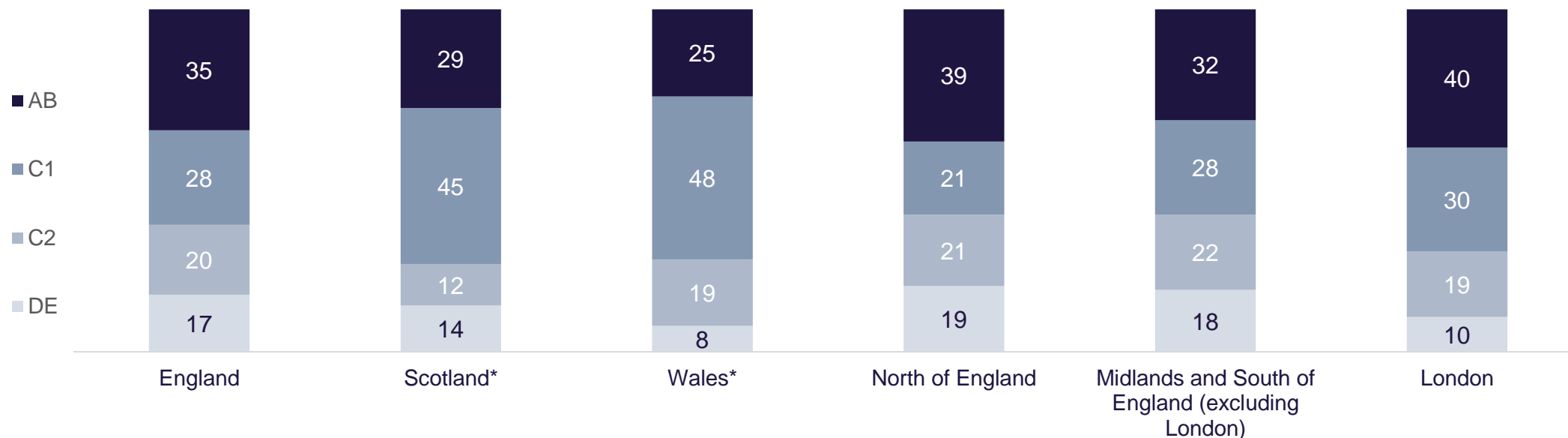


Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=298; Scotland n=63\*; Wales n=44\*; North of England n=119; Midlands and South of England (excluding London) n=152; London n=80 \*Small base size treat with caution. For region definitions see introduction.

# Winter Intenders' social grade - by destination region

London is the destination most likely to generate trips from AB social grades, followed closely by the North of England. Wales is likely to generate the highest proportion of visitors of a C1 social grade.

Figure 46. Social grade of Winter Intenders by destination region, Percentage, November and December, UK



Social grade question and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?  
 Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=298; Scotland n=63\*; Wales n=44\*; North of England n=119; Midlands and South of England (excluding London) n=152; London n=80 \*Small base size treat with caution. For region definitions see introduction.

# Winter Intenders' region of residence - by destination region

The table below illustrates the region of residence (in rows) for intenders to each destination (in columns). For example, 21% of Winter Intenders to England live in London.

**Table 6. Region of residence of Winter Intenders by destination region, Percentage, November and December, UK, (Read chart vertically)**

Region of residence [down]	England	Scotland*	Wales*	North of England	Midlands and South of England (excluding London)	London
England	90%	54%	81%	89%	90%	87%
Scotland	5%	37%	1%	7%	3%	9%
Wales	4%	5%	19%	4%	6%	4%
London	21%	10%	6%	15%	16%	45%
South East	13%	4%	13%	11%	15%	8%
North West	11%	3%	25%	19%	5%	5%
East of England	10%	8%	6%	5%	14%	4%
East Midlands	8%	3%	5%	5%	11%	6%
Yorkshire & Humberside	8%	9%	3%	12%	5%	8%
North East	7%	4%	0%	13%	4%	6%
South West	6%	2%	3%	3%	11%	1%
West Midlands	6%	10%	20%	6%	8%	5%

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 Winter England n=298; Scotland n=63\*; Wales n=44\*; North of England n=119; Midlands and South of England (excluding London) n=152; London n=80 \*Small base size treat with caution.

Column percentages may not quite equal 100% due to the omission of NI in the table. For region definitions see introduction.

# Winter Intenders' trip destination type - by destination region

Destination type tends to reflect the destination region being considered, e.g 70% of Winter London Intenders are considering a trip to a Large City.

**Table 9. Destination type of Winter trip by destination region, Percentage, November and December, UK, (Read chart vertically)**

Destination type	England	Scotland*	Wales*	North of England	Midlands and South of England (excluding London)	London*
A city or large town	37%	37%	15%	29%	30%	70%
Countryside or village	22%	27%	25%	24%	24%	15%
Traditional coastal/seaside town	21%	6%	19%	18%	26%	6%
Mountains or hills	15%	18%	20%	23%	12%	8%
Rural coastline	14%	17%	22%	8%	23%	1%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=279; Scotland n=47\*; Wales n=35\*; North of England n=71; Midlands and South of England (excluding London) n=109; London n=57\* \*Small base size treat with caution. For region definitions see introduction.

# Winter Intenders' trip taker party composition - by destination region

London is the most likely destination region to attract trip-takers with children, while Wales is most likely to generate trips with a partner, other family members and pets.

**Table 7. Trip taker party composition of Winter trip by destination region, Percentage, November and December, UK, (Read chart vertically)**

Visitor party composition	England	Scotland*	Wales*	North of England	Midlands and South of England (excluding London)	London*
Partner	57%	58%	65%	58%	56%	60%
Children or young adults (aged 16-24)	39%	13%	12%	40%	29%	46%
Friend/s	21%	17%	18%	20%	18%	26%
Other members of my family	12%	11%	24%	8%	11%	18%
Pets	10%	12%	21%	6%	11%	8%
With parents of older adults	8%	3%	15%	4%	5%	4%
Will travel alone	5%	7%	0%	1%	9%	5%
Other	8%	1%	1%	9%	4%	9%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=279; Scotland n=47\*; Wales n=35\*; North of England n=71; Midlands and South of England (excluding London) n=109; London n=57\* \*Small base size treat with caution. For region definitions see introduction.

# Winter Intenders' trip accommodation type - by destination region

In Scotland, the top choice of accommodation type is a private home, in Wales and England the top choice is commercial rental. Hotels are most chosen for overnight trips to London.

**Table 8. Accommodation type of Winter trip by destination region, Percentage, November and December, UK, (Read chart vertically)**

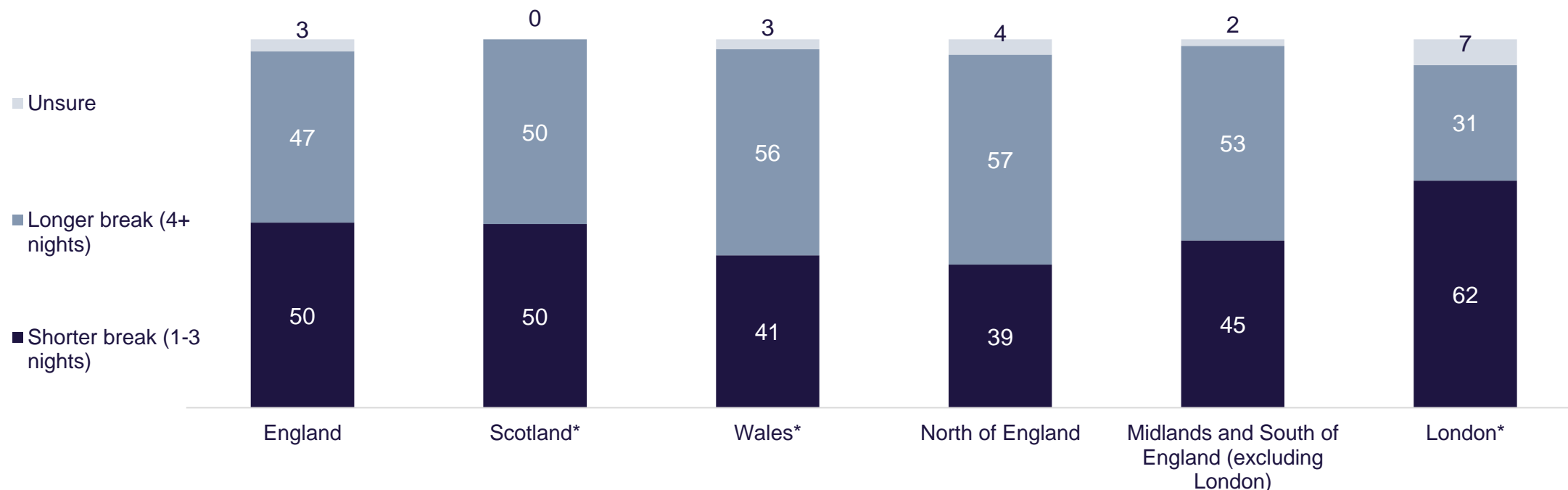
Accommodation type	England	Scotland*	Wales*	North of England	Midlands and South of England (excluding London)	London*
Commercial rental	53%	38%	48%	50%	45%	54%
Camping / caravan	48%	24%	39%	43%	38%	54%
Private home	48%	54%	18%	39%	39%	56%
Hotel / Motel / Inn	43%	40%	26%	34%	45%	54%
Guesthouse / B&B / Farmhouse	30%	26%	14%	32%	23%	28%
Other	16%	2%	12%	15%	8%	23%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=279; Scotland n=47\*; Wales n=35\*; North of England n=71; Midlands and South of England (excluding London) n=109; London n=57\* \*Small base size treat with caution. For region definitions see introduction.

# Winter Intenders' trip duration - by destination region

There is some variation in trip duration by destination. London, for example, is more likely a destination for short breaks, whereas Wales and the North of England have a higher incidence of longer breaks, compared to average.

Figure 47. Duration of Winter trip by destination region, Percentage, November and December, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=279; Scotland n=47\*; Wales n=35\*; North of England n=71; Midlands and South of England (excluding London) n=109; London n=57\* \*Small base size treat with caution. For region definitions see introduction.



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# Methodology



# Methodology

- The findings in this report are based on an online survey conducted amongst 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' in Wales and 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.

# 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.

