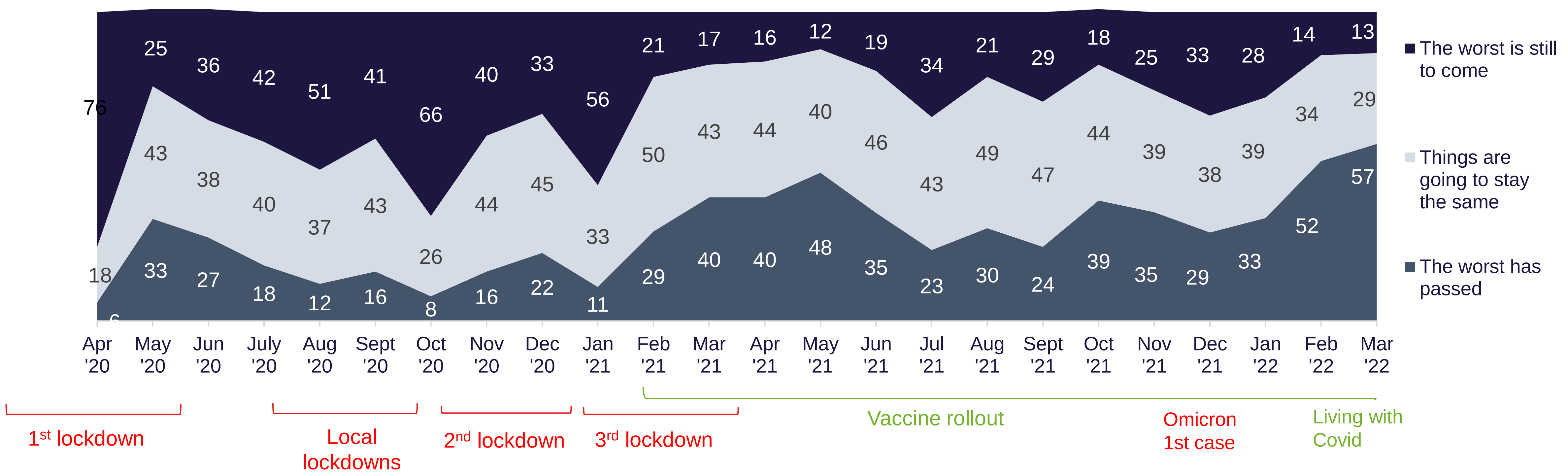
Domestic Consumer Sentiment Tracker

Perceptions of the situation relating to COVID-19

The perception of the current situation in relation to COVID-19 has improved since February 2022. The proportion of those who think 'the worst has passed' (57%) continues to rise.

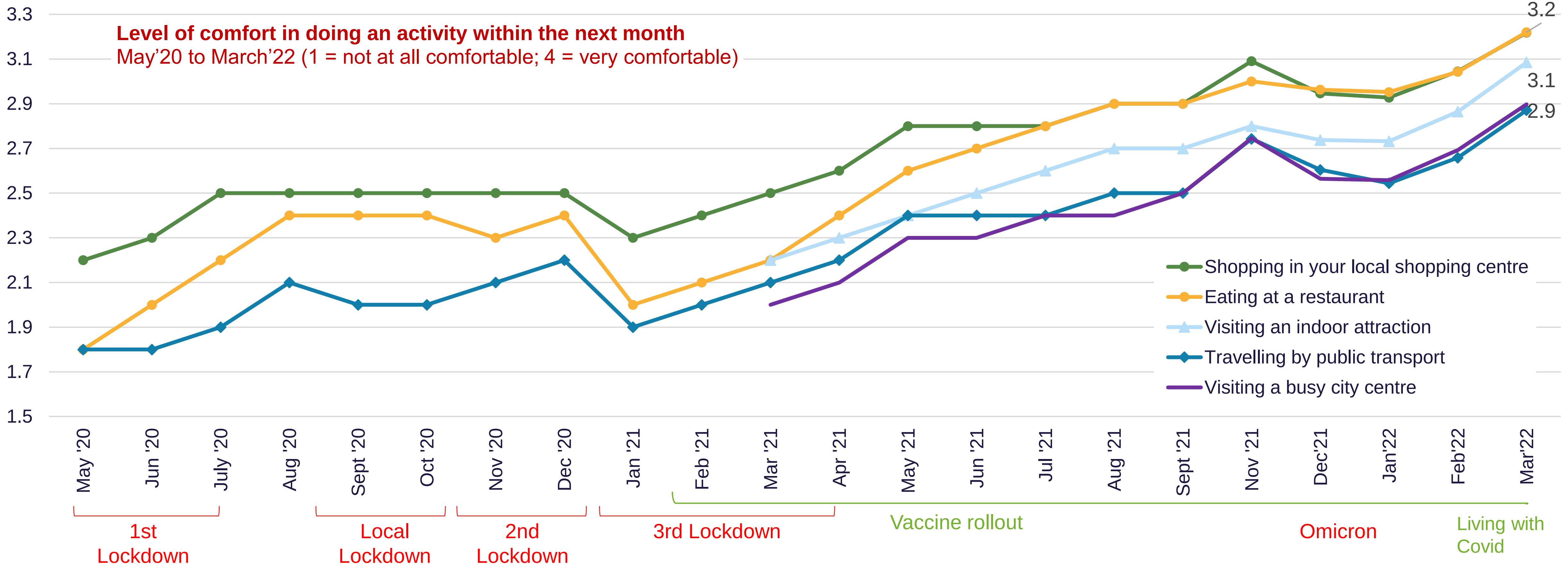
Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK



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. March 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

British comfort with tourism activities has improved

The British public has grown more comfortable with certain activities since the initial stage of Covid in Spring 2020. The movement in comfort closely corresponds to the various waves / lockdowns, vaccine rollouts and return to normality. Travelling by public transport and visiting a busy city centre are still the activities which hold the most discomfort.

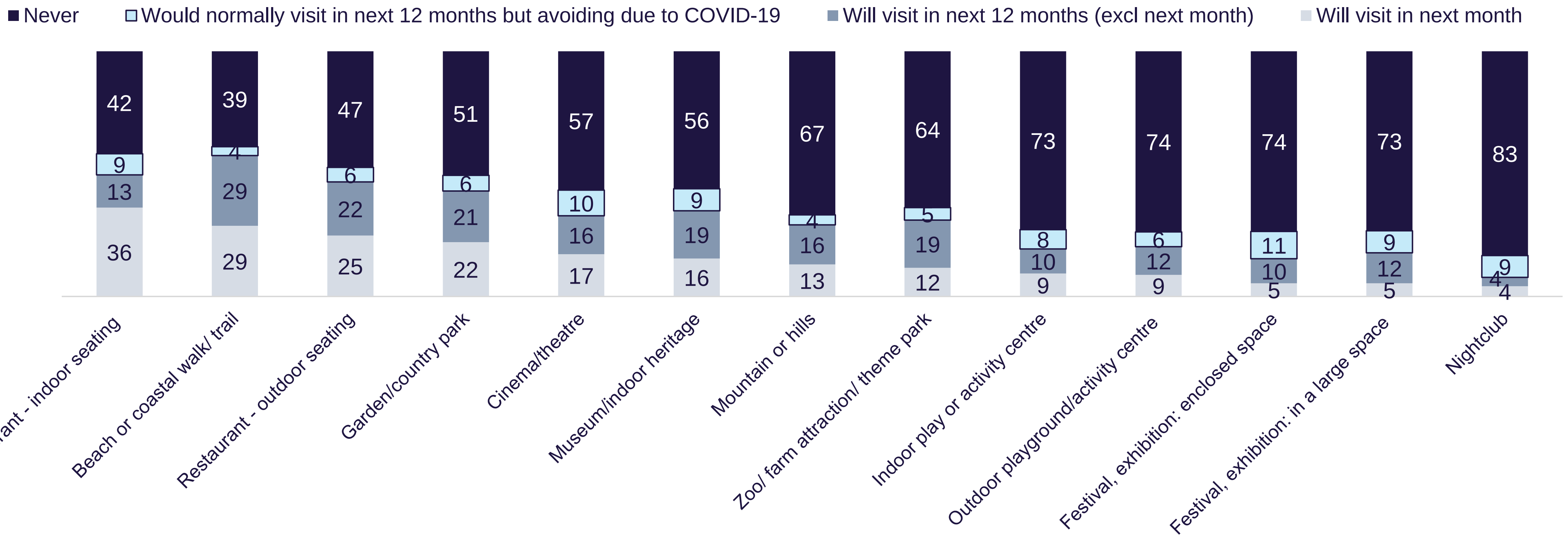


Source: Domestic Sentiment Tracker (March 2022) published by VisitEngland in partnership with BVA BDRC

Intention to visit leisure places in the UK

Out of the included places/venues, ‘restaurant with indoor seating’ is the venue most likely to be visited in the next month (36% intending to do so). ‘Cinema/theatre’ and ‘festival/exhibitions in an enclosed space’ are the venues most likely to be avoided in the next 12 months due to COVID-related reasons (10% and 11% stating this).

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

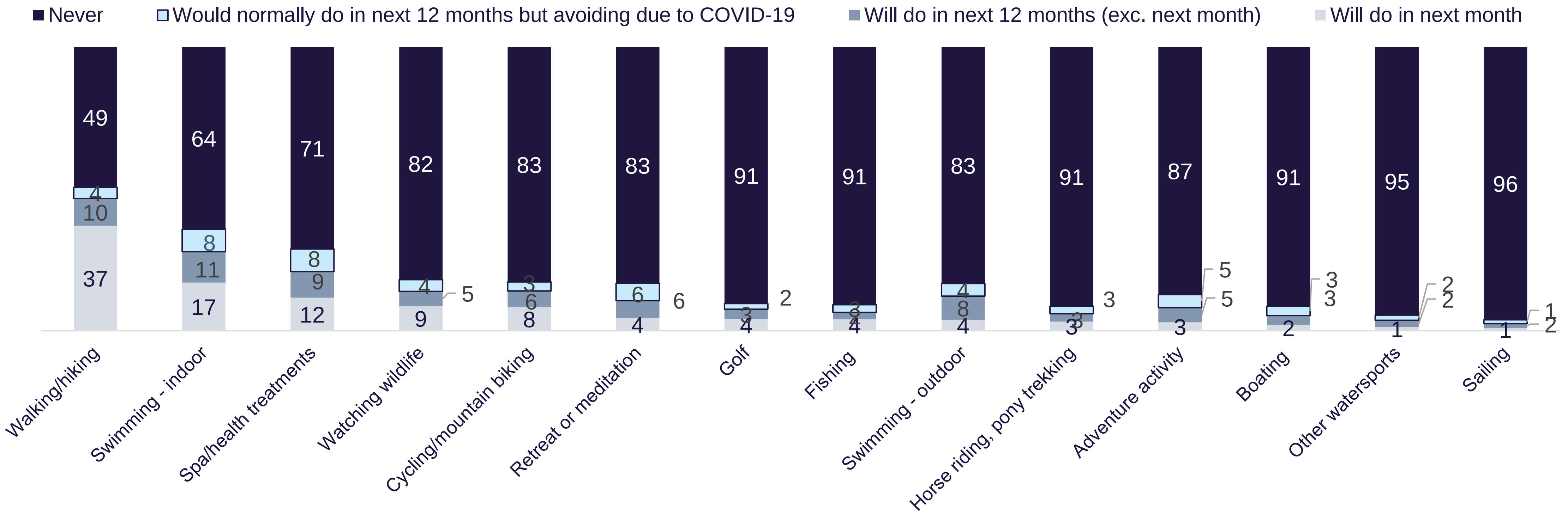


VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All respondents. March 2022 = 1,756

Intention to conduct leisure activities in the UK

Out of the activities included, ‘walking/hiking’ is the activity respondents are most likely to do in the next month (at 37%). ‘Indoor swimming’ and ‘spa/health treatments’ are the activity most likely to be avoided due to COVID-19 (8% stating this for each).

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

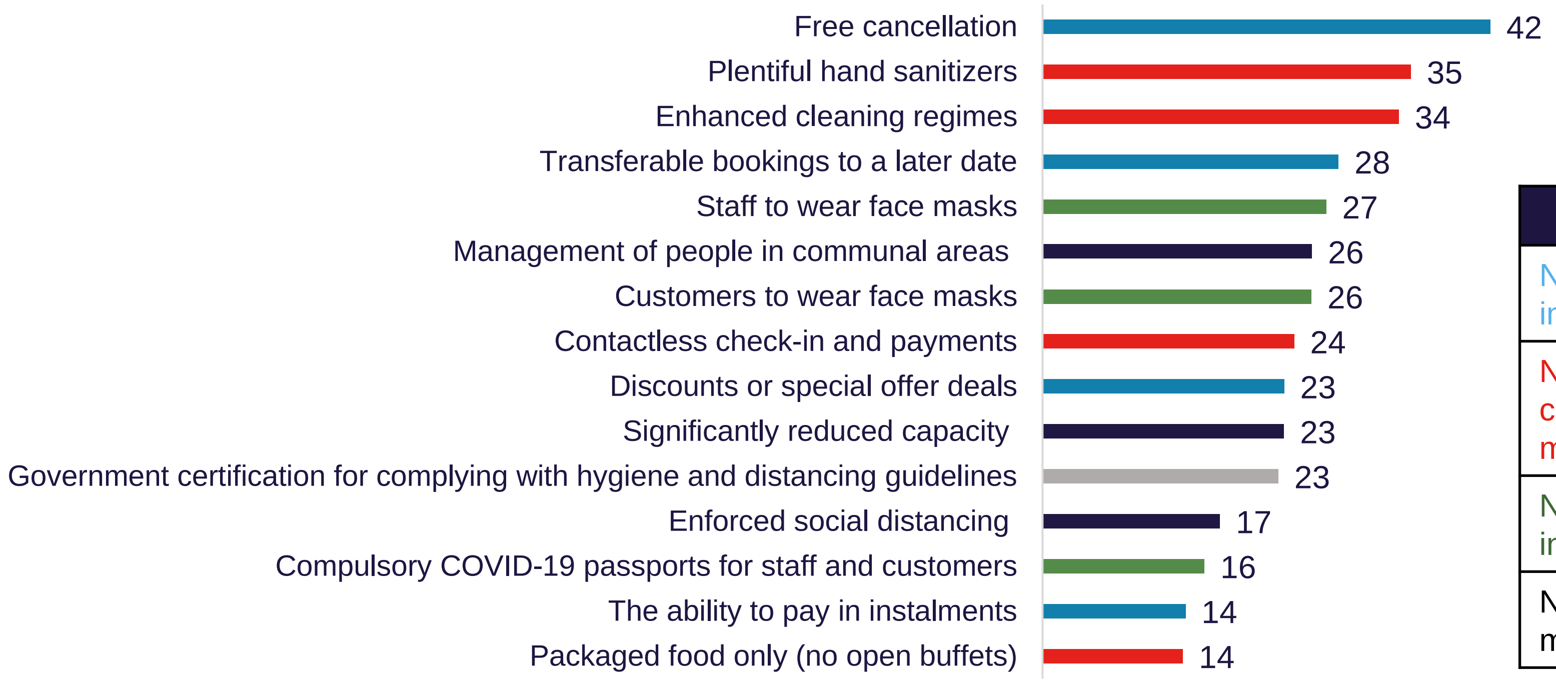


VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All respondents. March 2022 = 1,756

Required conditions for indoor leisure / tourism providers

‘Free cancellation’ is the leading condition that UK adults deem essential for indoor leisure and tourism providers to have in place to encourage a visit (42% stating this). This is followed by ‘plentiful hand sanitizers’ (35%) and ‘enhanced cleaning regimes’ (34%). Overall, the net figures have declined compared to previous months.

Figure 6. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, March 2022, UK, Full list



	Nov	Dec	Jan	Feb	Mar
Net: Financial booking incentives	64%	63%	62%	63%	58%
Net: Reduced contamination measures	61%	59%	60%	60%	53%
Net: Guest/staff interventions	54%	59%	58%	53%	41%
Net: Social distancing measures	57%	60%	57%	52%	45%

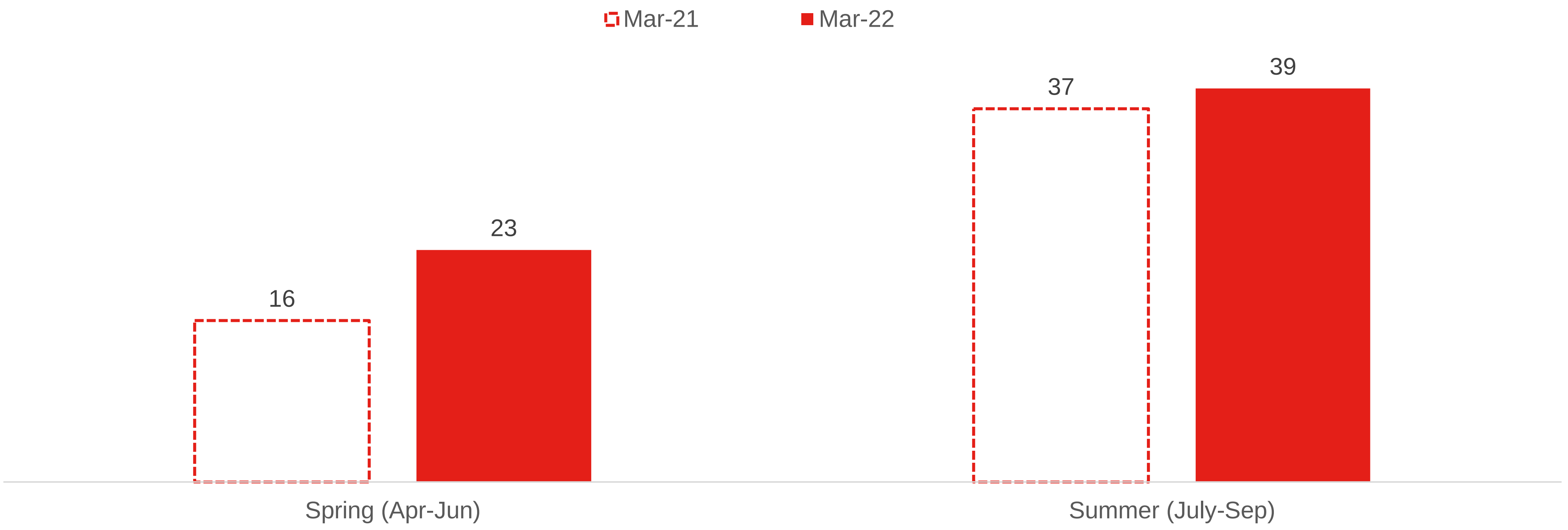
Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: All respondents. March 2022 = 1,756

Domestic holiday intent

Source: Profiling Report, January – February 2022 data

Domestic holiday intent for Spring 2022 is up on 2021 due to fewer restrictions, while Summer 2022 looks to be similar

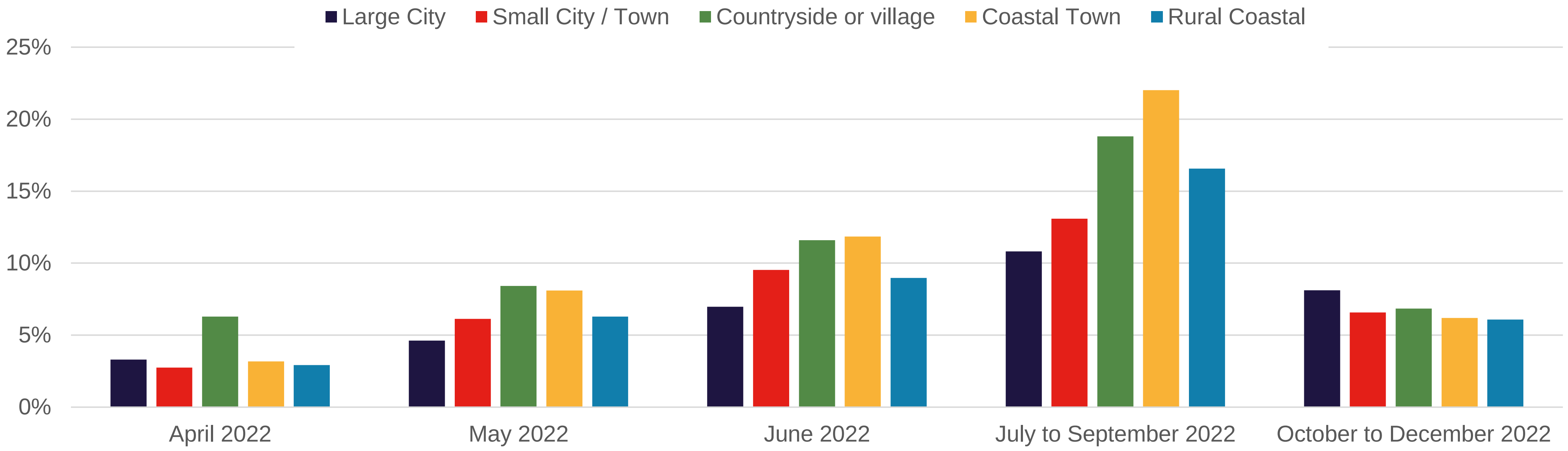
% of British public intending to take a domestic holiday in Spring and Summer
Comparing March'21 intent to March'22 intent



Source: Domestic Sentiment Tracker (March 2022) published by VisitEngland in partnership with BVA BDRC

However, the domestic intent (May to September) for cities remains low vs other destination types. As cities rely more on inbound, increased domestic intent can help close the gap.

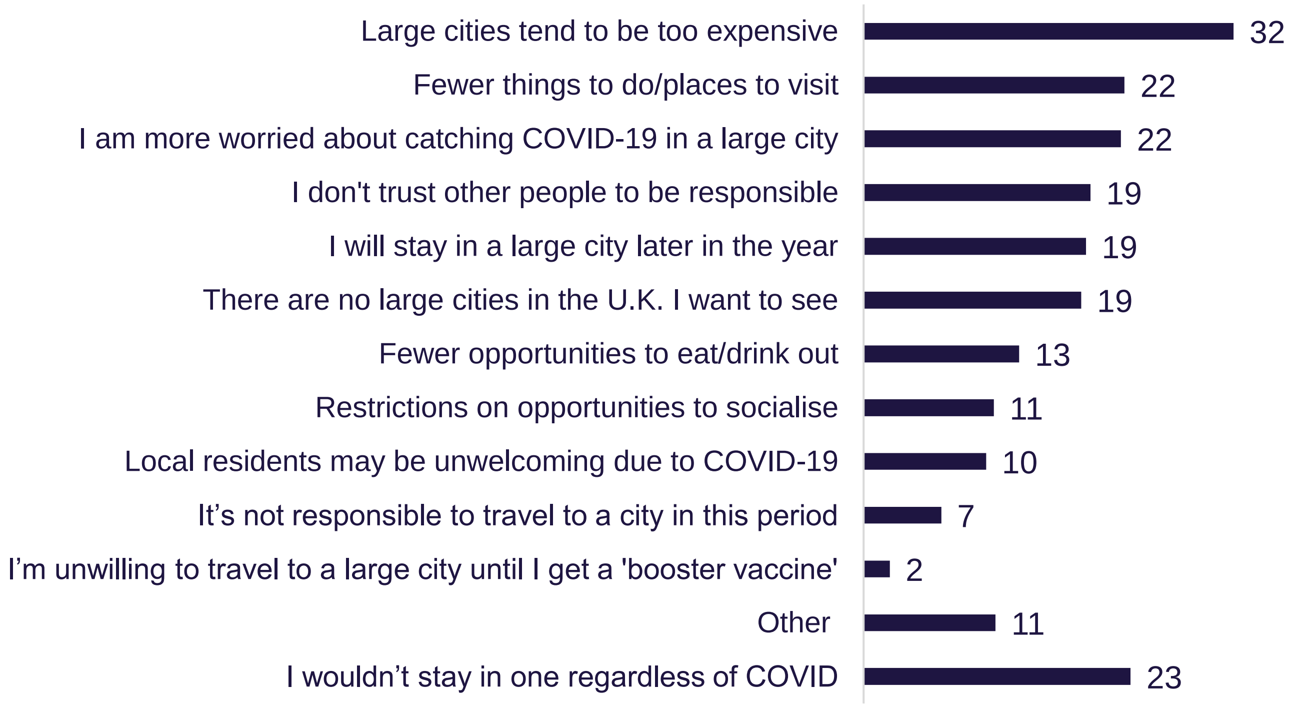
% of British public intending to take a domestic holiday by destination type



Source: Domestic Sentiment Tracker (March 2022) published by VisitEngland in partnership with BVA BDRC

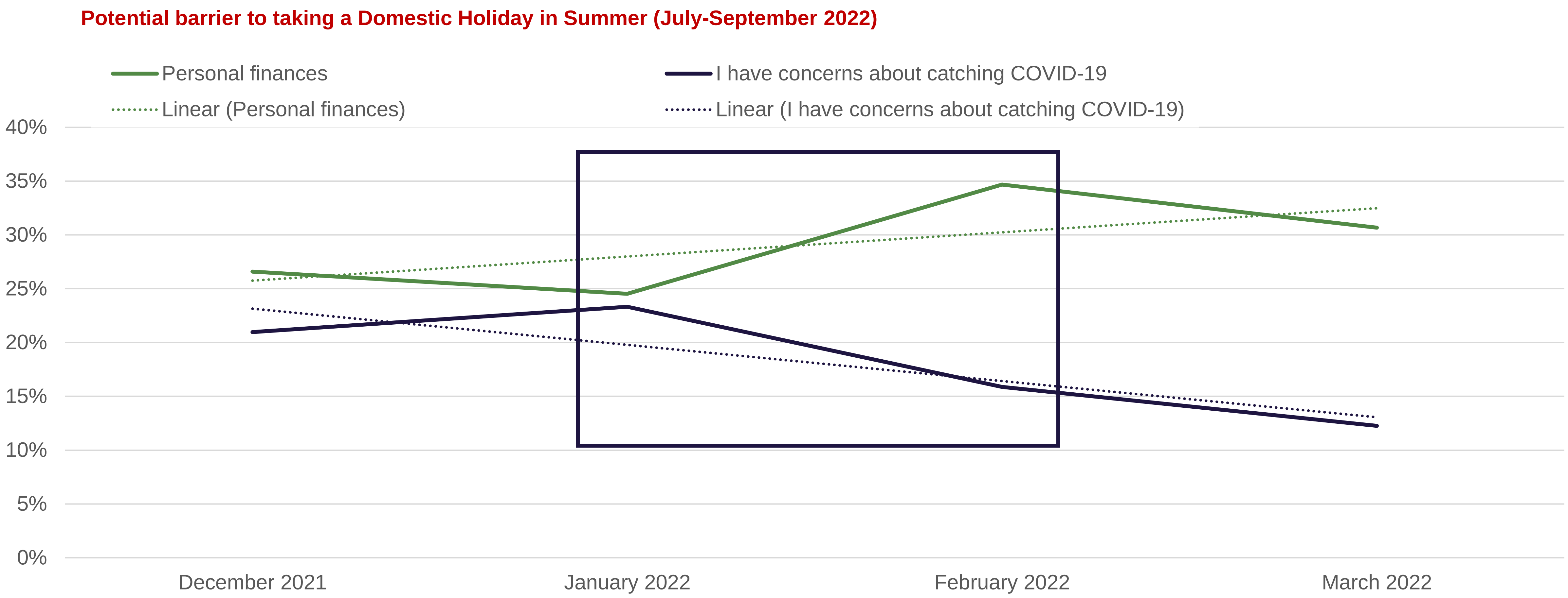
The top reasons for not staying in a city on the next UK trip is that the cities are too expensive

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



VB5b. You indicated you don’t plan on staying in a large city during your next UK holiday or short break in April to June 2022. Why is this? Base: All March 2022 respondents that don’t plan on staying in a city on their next UK trip between April and June n=304.
Multiple choice question. Totals may exceed 100%

As Covid concerns decline, the financial barriers to taking holidays come through in the top three barriers to a potential trip



Living with Covid

Source: Domestic Sentiment Tracker (March 2022) published by VisitEngland in partnership with BVA BDRC

When looking at the Jan to Feb change in finances related barriers, personal finances increase is driven mostly by Pre-Nesters and Families, while rising costs of holidays increased most for Families

Figure 11. Personal finances as a potential barrier to taking an overnight trip in the UK in Spring, Percentage, January and February, UK

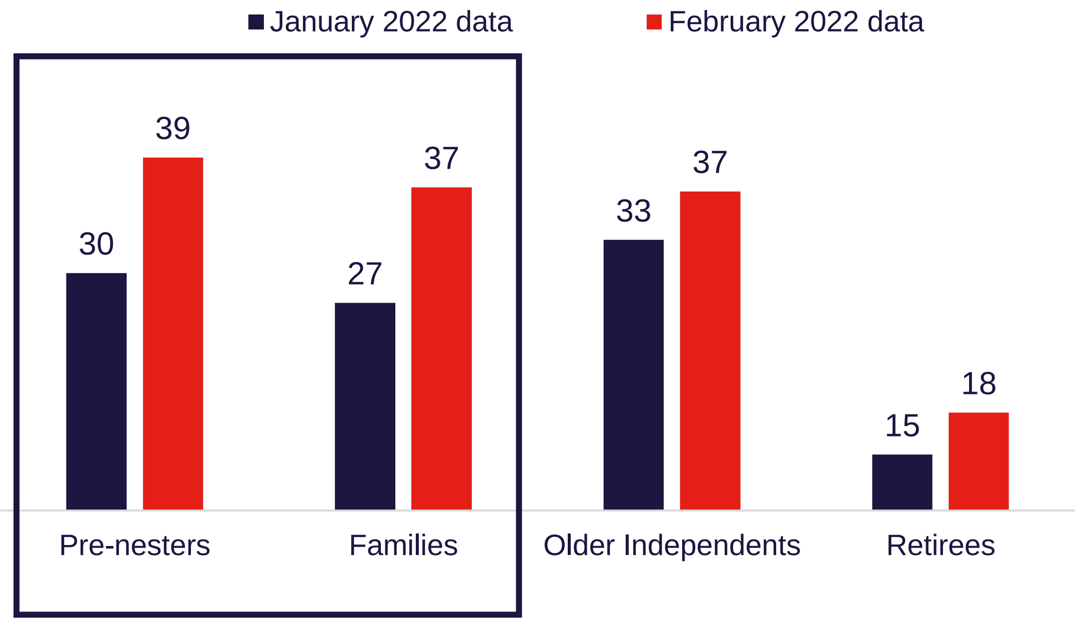
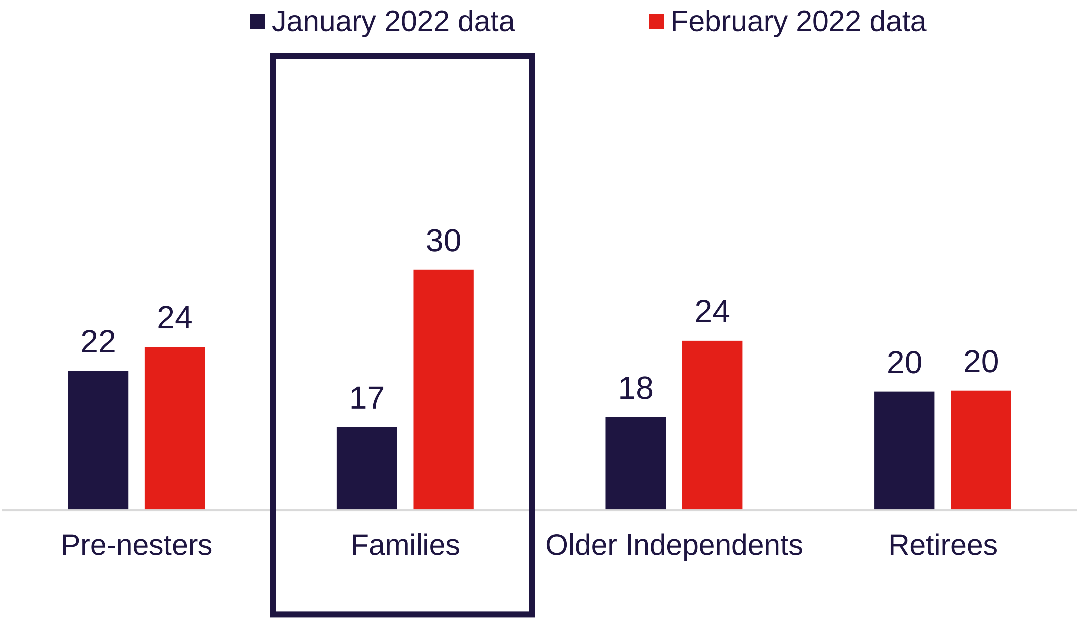


Figure 12. Rising costs of holidays/leisure as a potential barrier to taking an overnight trip in the UK in Spring, Percentage, January and February, UK

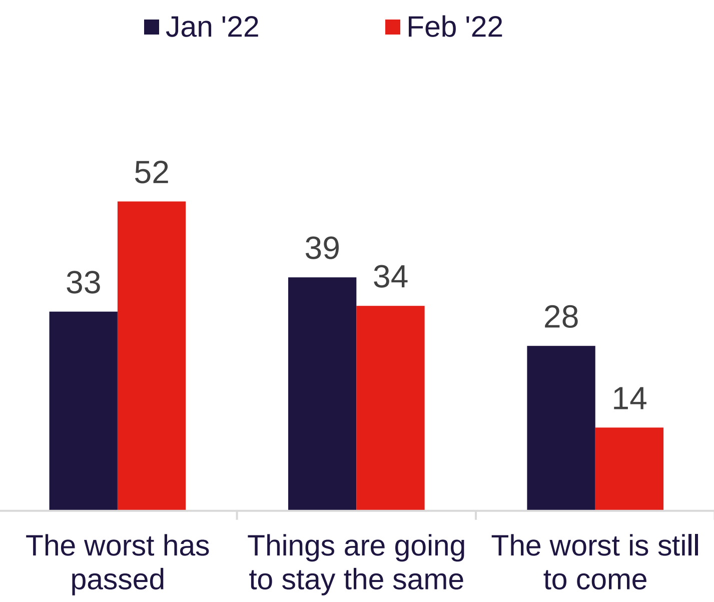


Source: Domestic Sentiment Tracker (March 2022) published by VisitEngland in partnership with BVA BDRC

Sentiment Tracker: February report

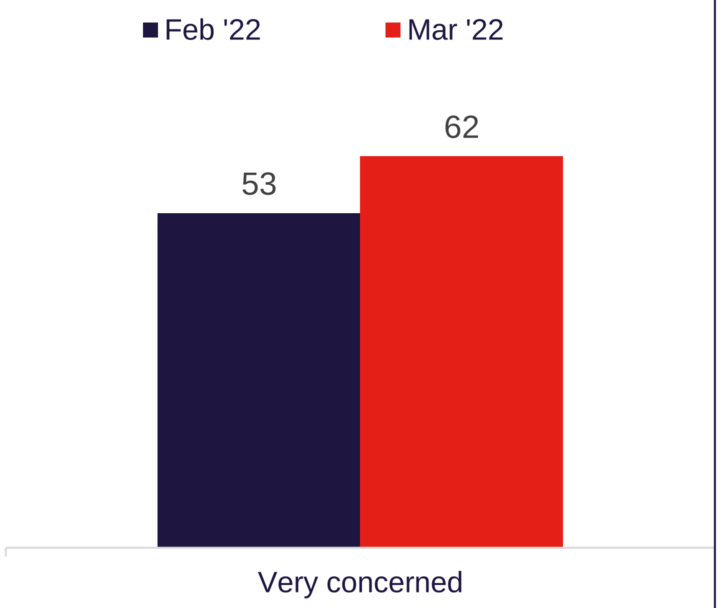
The latest Sentiment report showed a positive shift in terms of the current Covid situation, however, there was no increase in the overnight trips intentions. The reason might be related to the costs of living.

Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK



Proportion anticipating going on any overnight UK and overseas trips, <u>April-June 2022,</u> Percentage, Wave-on-wave, February 2022, UK

Concerns around rising living costs/inflation, wave-on-wave, UK



THANK YOU