

COVID-19 Consumer Tracker

December 2021

Published: 15th December 2021

Fieldwork Period: 1st – 7th December 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.
- The survey addresses areas such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation of their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave's fieldwork was conducted between 1st – 7th December 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.

- **December 2021 to March 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between December 2021 and March 2022
- **April to June 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 2022

December 2021: Scorecard of Key Metrics

Key Metrics	December 2021	Change since November 2021
National mood (average score out of 10)	6.6	-0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	29%	-6%*
Appetite for risk (average score out of 4)	2.8	-0.1
Confidence in ability to take UK overnight trip in December / January / February (% NET confident)	51% / 44% / 46%	-6%* / -13%* / -13%*
Confidence in ability to take overseas overnight trip in December / January / February (% NET confident)	32% / 29% / 30%	-8%* / -8%* / -8%*
Will take more UK trips in the next 12 months than past 12 months [%]	32%	+2%
Will take more overseas trips in the next 12 months than past 12 months [%]	21%	+1%
Proportion intending a UK overnight trip in next 12 months [%]	55%	0%
Proportion intending an overseas overnight trip in next 12 months [%]	44%	+3%
Top 3 barriers to taking a UK overnight trip from December to March	1. Personal finances 2. Restrictions on travel from government 3. UK weather	Restrictions on travel from government in Top 3
Top 3 barriers to taking an overseas overnight trip from December to March	1. Restrictions on travel from government 2. The risk of quarantine 3. Personal finances	Restrictions on travel from government in Top 3

* Represents a significant change on previous wave

The impact of Omicron

While Omicron has some impact on attitudes and confidence to travel, the intention to travel remains stable

General impact on attitudes	Impact on travel intentions	Impact on confidence to travel
Perception of the situation - Increase in the number of people who believe that the worst is still to come	Intentions to take UK overnight trips in Jan-Mar'22 and in Apr-Jun'22 are stable	Confidence in the ability to take overnight UK and Overseas trips dropped, especially for Jan-Mar'22
A slight decrease in feeling comfortable with the following activities - Visiting a busy city centre - Traveling by public transport - Going to a shopping centre	Intentions to take Overseas overnight trips in Jan-Mar'22 and in Apr-Jun'22 are stable	Barrier to taking an overnight trip: 'Restrictions on travel from government' increased % for both UK and Overseas.

Chronological order of key events:

- November fieldwork dates: 3rd – 10th November 2021
- Omicron variant's first case announced on the 24th November 2021
- December fieldwork dates: 1st – 7th December 2021
- Travel restrictions announced on the 7th December 2021



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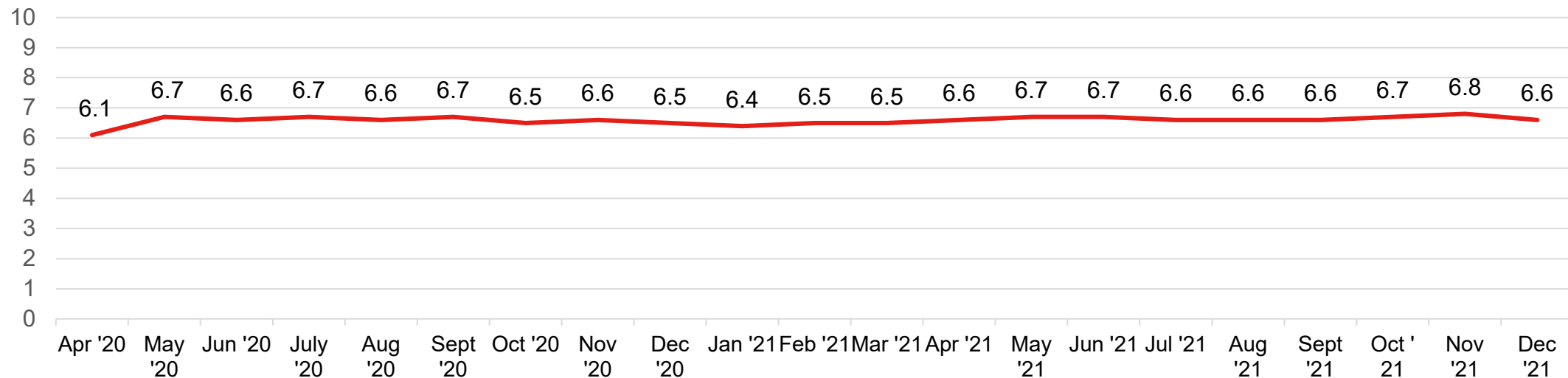
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1. Covid Impact on Attitudes to Travel

The Current Mood

Compared to November 2021, the average mood of UK adults has moved down 0.2 points to 6.6 out of 10, returning to levels reported in September 2021.

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



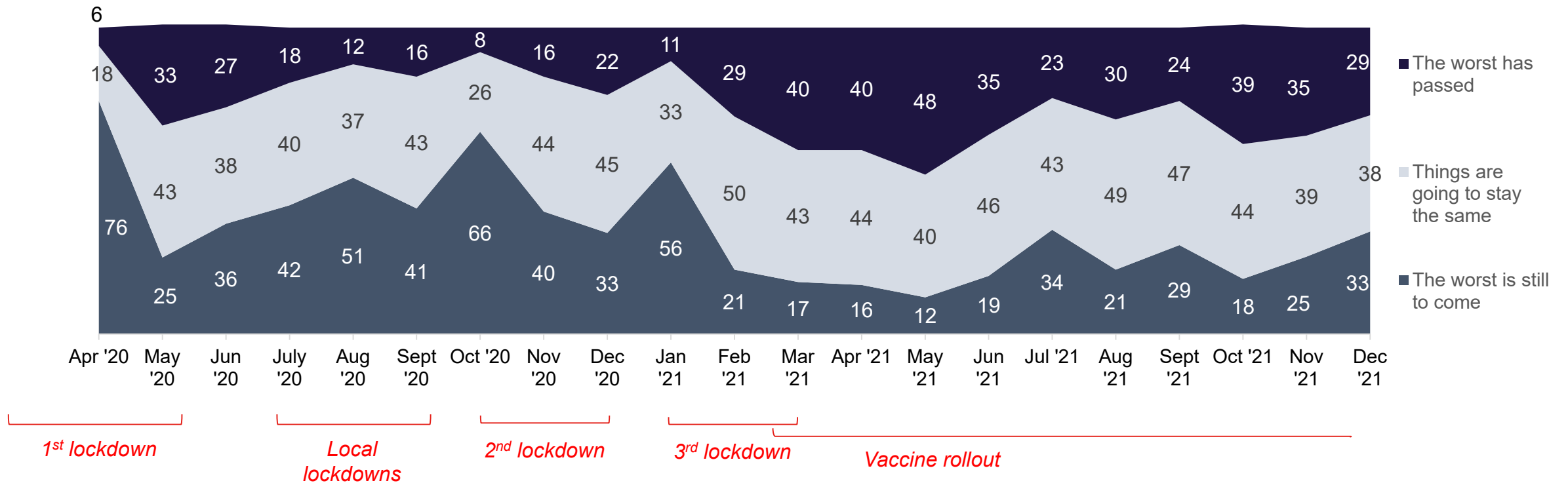
Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. December 2021 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750

Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Perceptions of the situation relating to COVID-19

Following the Omicron news, the perception of the current situation has become a bit more negative. A third of the UK public is more likely to think that 'the worst is still to come' in relation to COVID-19, compared to November 2021.

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

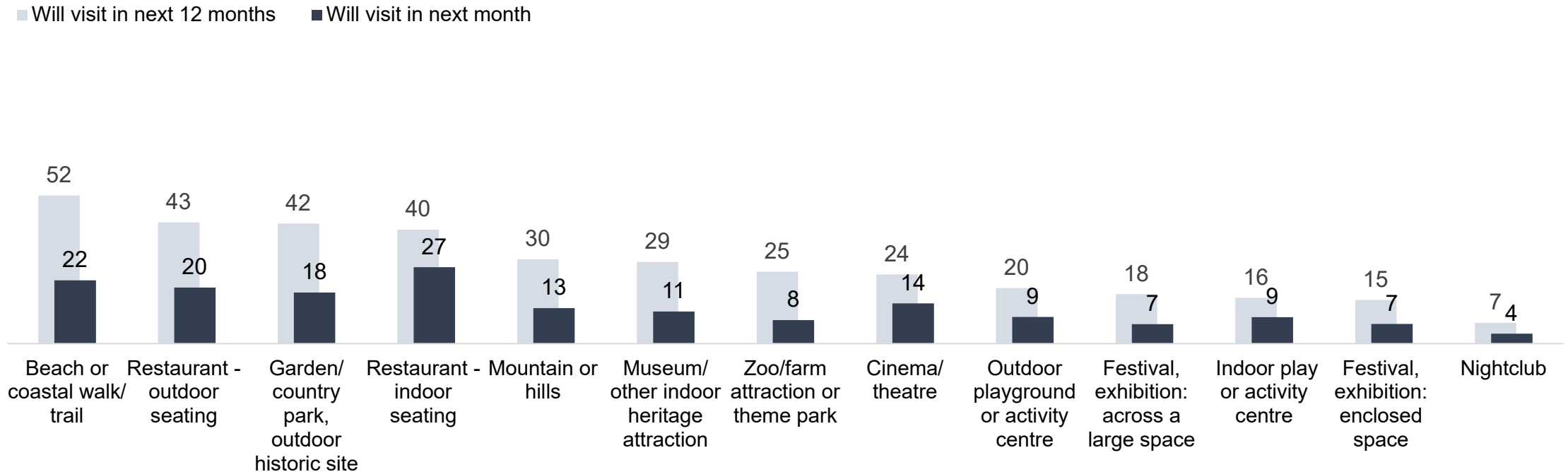


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: All respondents. December 2021 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of 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.

Intention to visit leisure places in the UK

Out of the included places, beach or coastal trail is the most likely to be visited in the next 12 months (52%). In the next month, the most likely visited place is 'restaurant with indoor seating' (27%).

Figure 3. Intention to visit leisure venues, Percentage, December 2021, UK



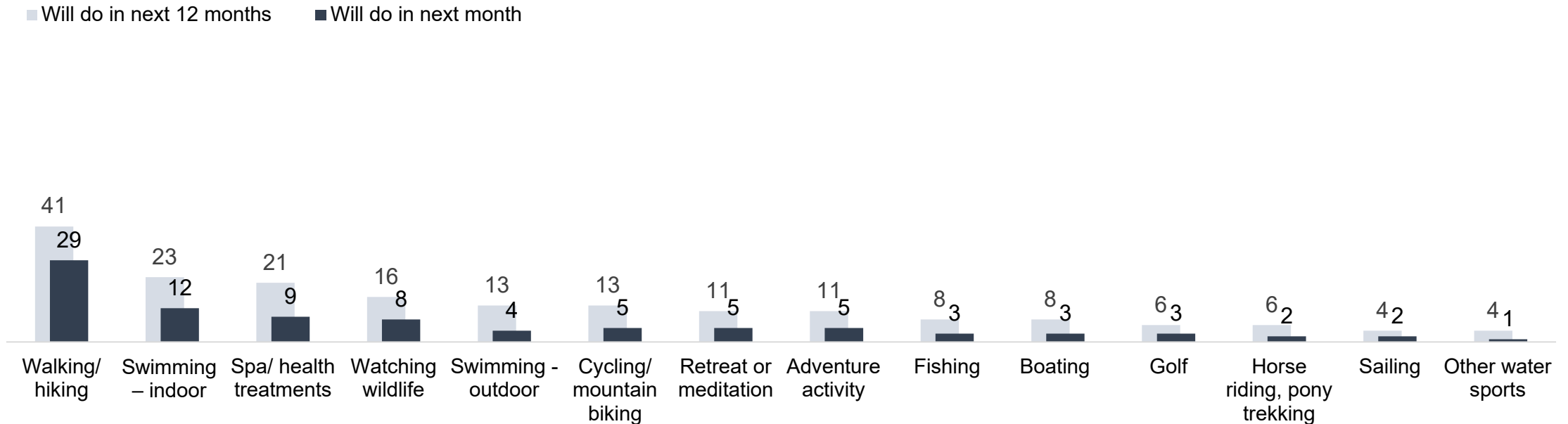
VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month?

Base: All respondents. December 2021 = 1,756

Intention to conduct leisure activities in the UK

‘Walking/hiking’ is the most likely activity in the next 12 months (41%), as well as in the next month (29%) and ‘Indoor swimming’ is the next most popular, with 23% intending to do so in the next 12 months and 12% in the next month.

Figure 4. Intention to conduct leisure activities, Percentage, December 2021, UK



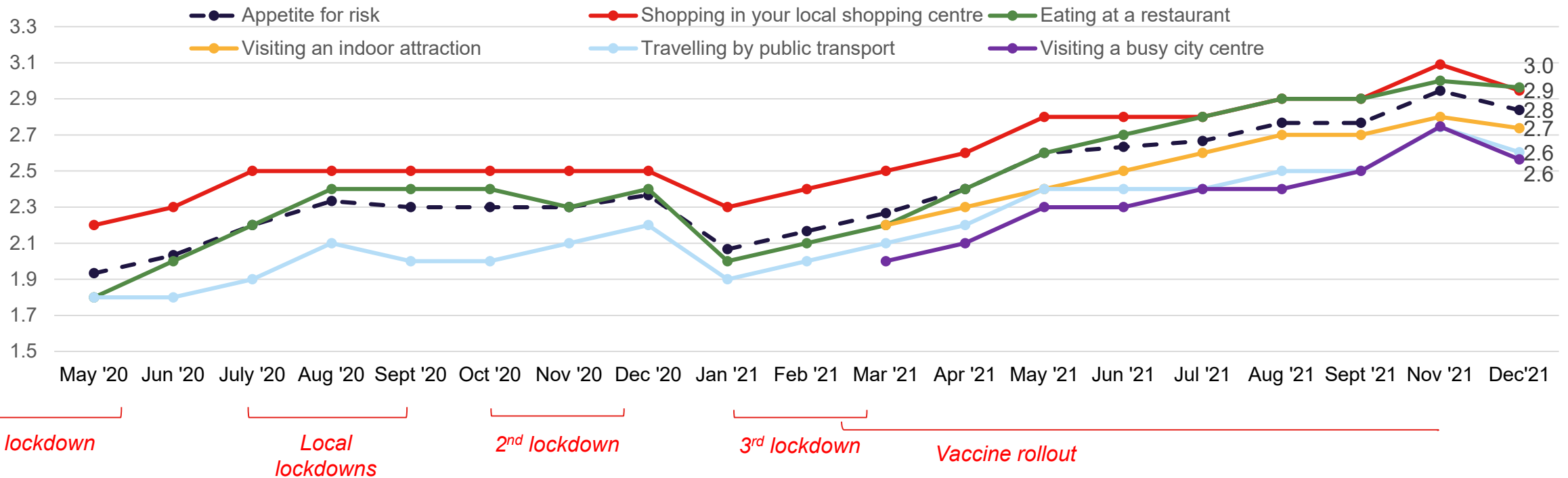
VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month?

Base: All respondents. December 2021 = 1,756

Comfort levels with everyday activities

The 'appetite for risk' score has slightly decreased this month (by 0.1 points) but remains at its second highest level (2.8 out of 4) since the research began in May 2020. As for individual activities, the largest decreases are in 'shopping in your local shopping centre', 'visiting a busy city centre' and 'travelling by public transport'.

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



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
 Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. December 2021 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
 Note: These questions were not asked in October 2021

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 (43% stating this), followed by mask wearing by both customers (42%) and staff (41%). Differences amongst the top 5 conditions are not statistically significant.

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, December 2021, UK, Full list



	Dec	Nov
Net: Financial booking incentives	63%	64%
Net: Social distancing measures	60%	57%
Net: Reduced contamination measures	59%	61%
Net: Guest/staff interventions	59%	54%



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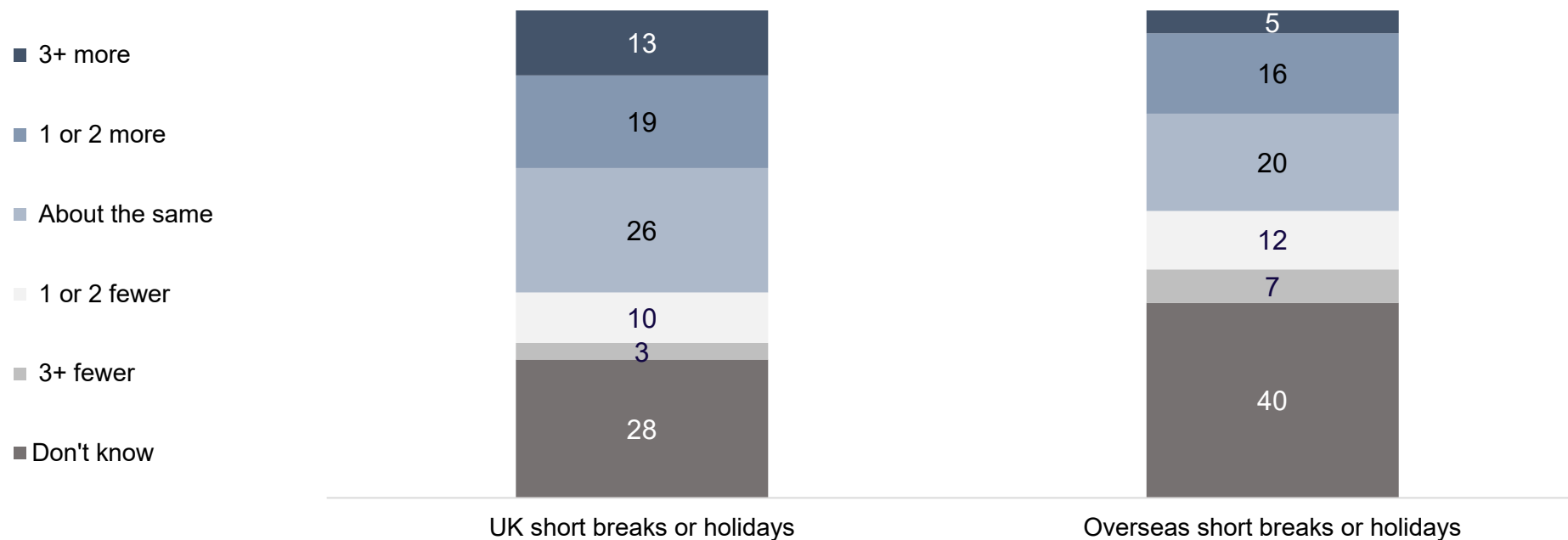
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2. Trip Intentions: UK and overseas

Anticipated number of UK and overseas trips in the next 12 months compared to the last 12 months

While there is a rather positive expectation of more UK and overseas trips in the next 12 months compared to the past 12 months, the projection is better for domestic overnight trips (32% anticipate more UK trips compared to 21% overseas).

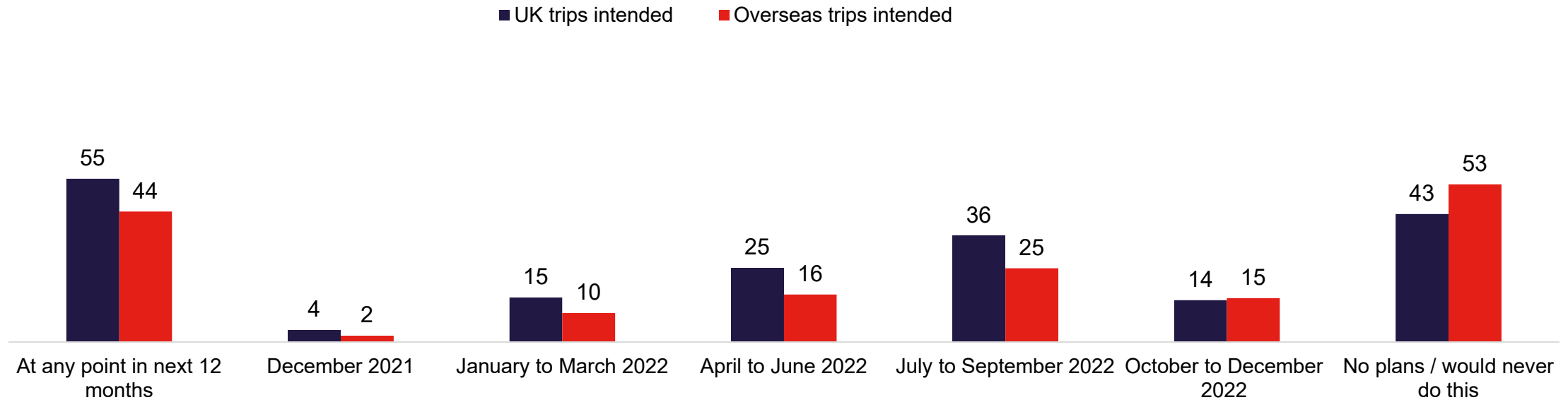
Figure 7. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, December 2021, UK



Overnight trips intentions

Over half (55%) of the UK public plan on taking an overnight domestic trip in the next 12 months (by the end of November 2022), significantly more than the 44% planning to take an overnight overseas trip in this period.

Figure 8a. Proportion anticipating going on any overnight UK and overseas trips, Percentage, December 2021, UK

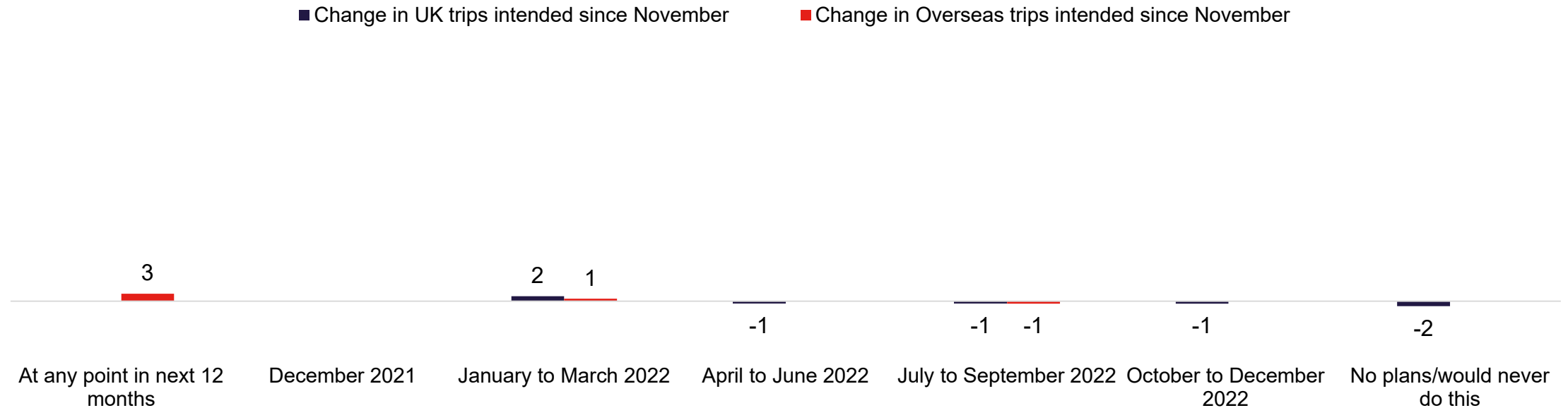


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are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

Change in overnight trip intentions – December intentions vs November intentions

Compared to November, the intentions to take overnight UK or overseas trips over the next 12 months remained more or less stable.

Figure 8b. Changes in UK and Overseas overnight trip intention – December vs November, Percentage, December 2021, UK

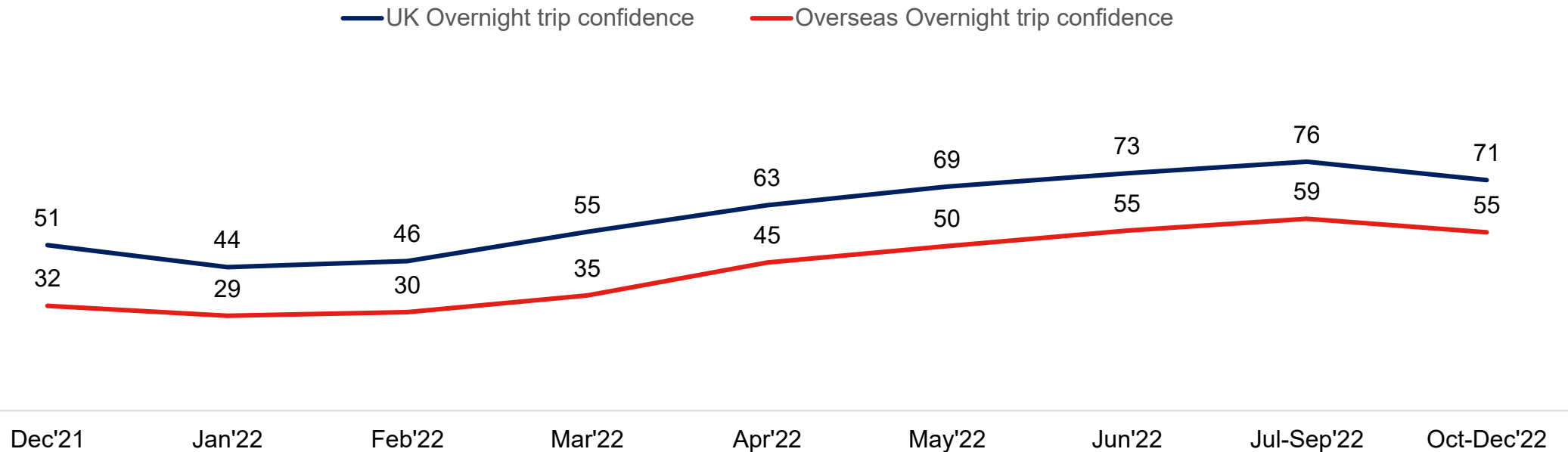


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are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

Confidence in the ability to take overnight UK and Overseas trips

Around half of the UK population are confident that any booked UK holiday or short break would go ahead in December, dropping in January and February, before picking up from March onwards. Confidence for overseas trips is lower than for UK trips, with only a third being confident in the ability to take an overnight trip abroad.

Figure 9. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, December 2021, UK



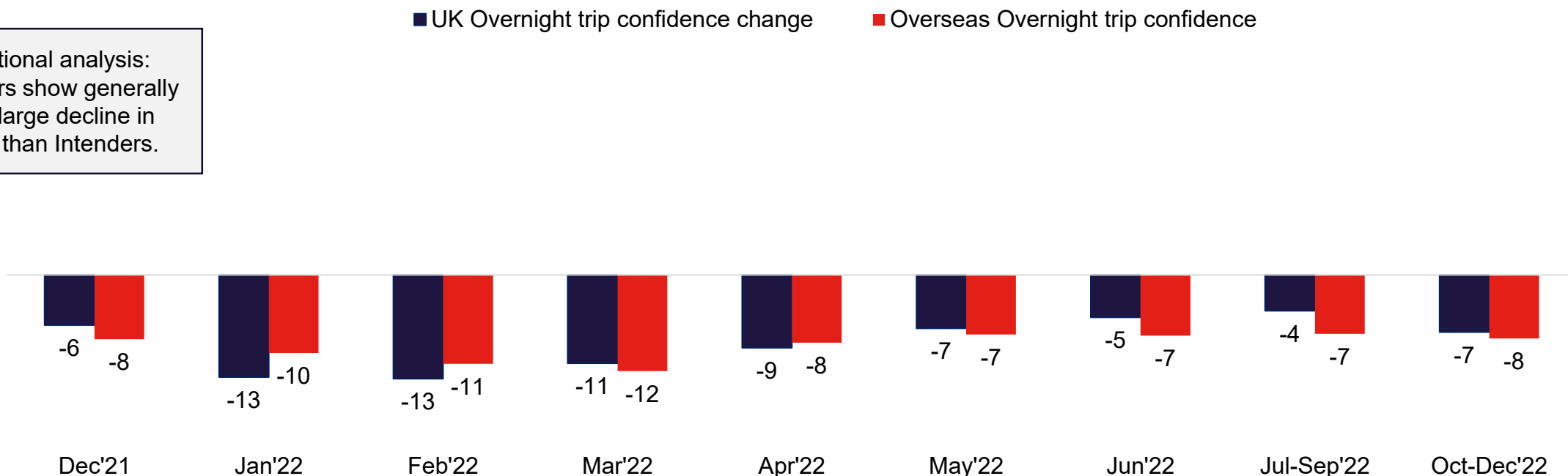
VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months? VB7d. We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?
 Base: All respondents. December 2021 = 1,756

Change in confidence in the ability to take overnight UK and Overseas trips, since November

Compared to November 2021, confidence in the ability to take UK and overseas overnight trips has now dropped for all months over the next year. The decline is greater among non-intenders than among intenders.

Figure 10. Changes in UK and Overseas overnight trip confidence since November 2021, Percentage, December 2021, UK

From additional analysis:
Non-intenders show generally
a twice as large decline in
confidence than Intenders.



VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months? VB7d. We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?

Base: All respondents. December 2021 = 1,756

Perceived barriers to taking overnight UK and Overseas trips between Dec'21 and Mar'22

The main perceived barriers to taking an overnight trip in the UK between December and March are 'personal finances' and 'restrictions on travel from government' (27% stating each). For overseas trips, 'restrictions on travel from the government' is at the top at 28% with the 'risk of quarantine' close behind (27%).

Figure 11. Barriers for taking an overnight UK trip in December 2021 to March 2022, Percentage, December 2021, UK

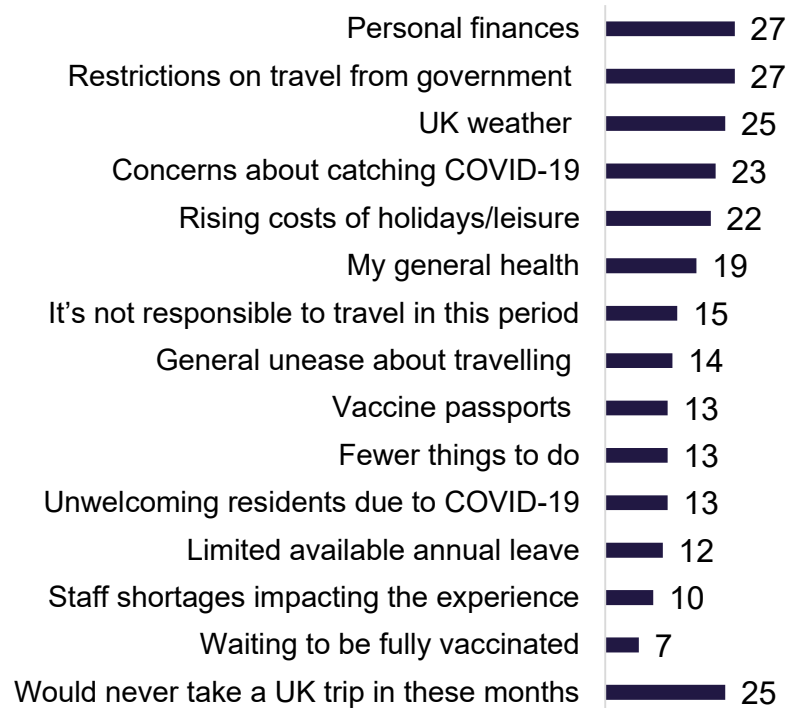
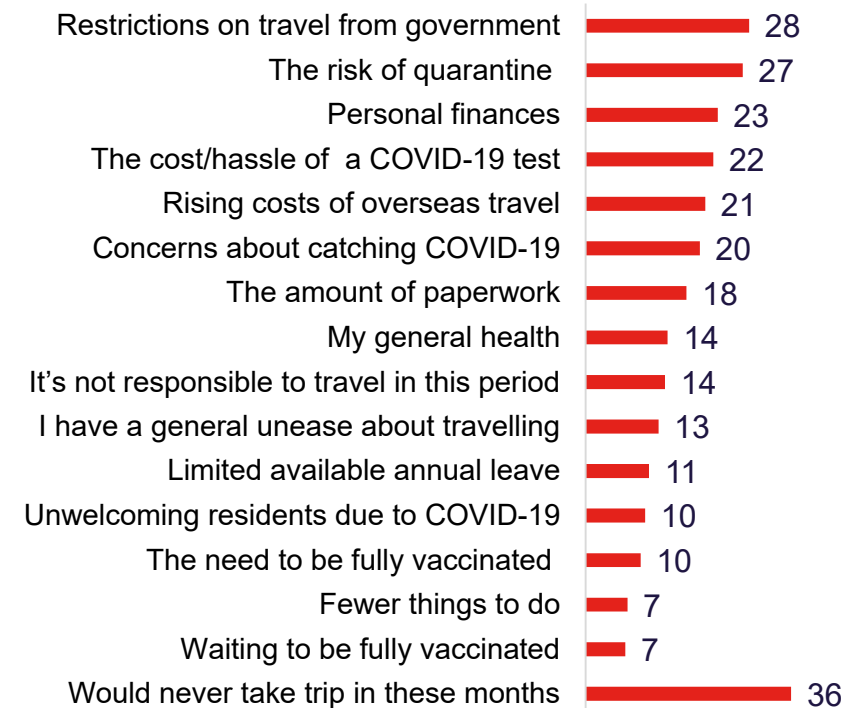


Figure 12. Barriers for taking an overnight OVERSEAS trip in December 2021 to March 2022, Percentage, December 2021, UK



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>? VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in?
Base: All asked each question Base: All asked each question. December to March n=1,471

Perceived barriers to taking overnight UK and Overseas trips between Apr'22 and Jun'22

'Personal finances' is perceived to be the biggest barrier to taking overnight UK trips between April to June, 26% stating this, followed by 'restrictions on travel' (24%). For overseas trips, the 'risk of quarantine' and 'restrictions on travel from the government' are the biggest barriers - both at 30%.

Figure 13. Barriers for taking an overnight UK trip April to June 2022. Percentage, December 2021, UK

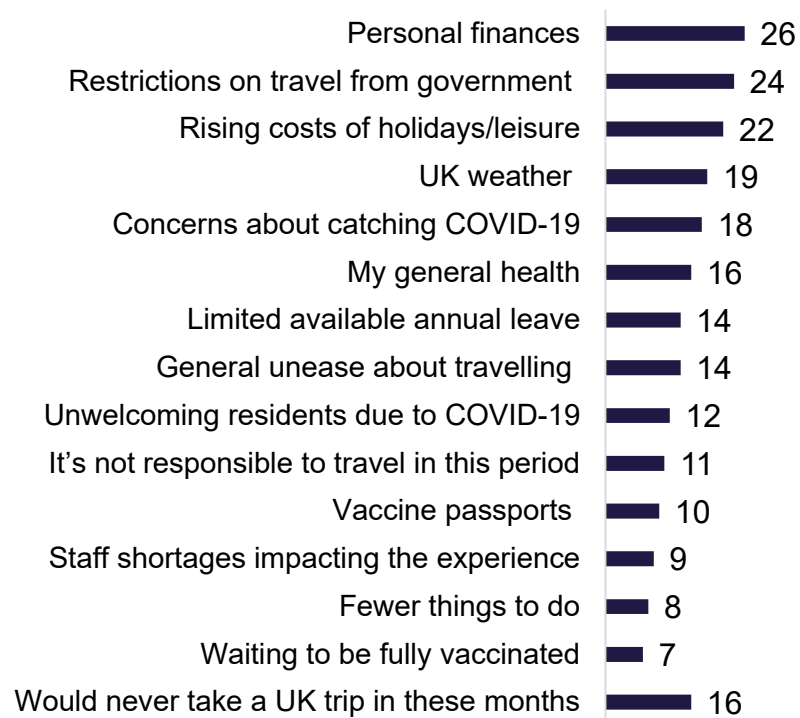
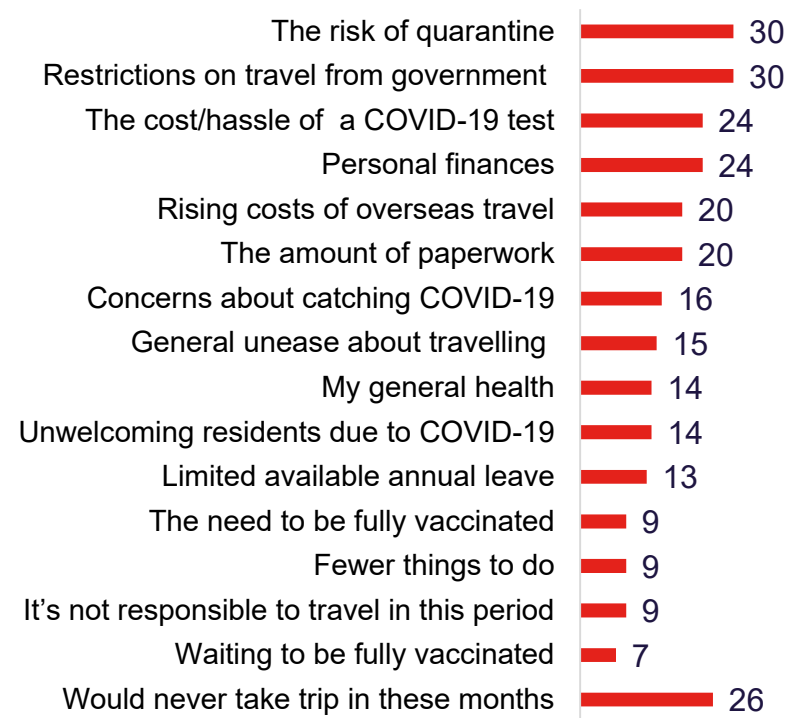


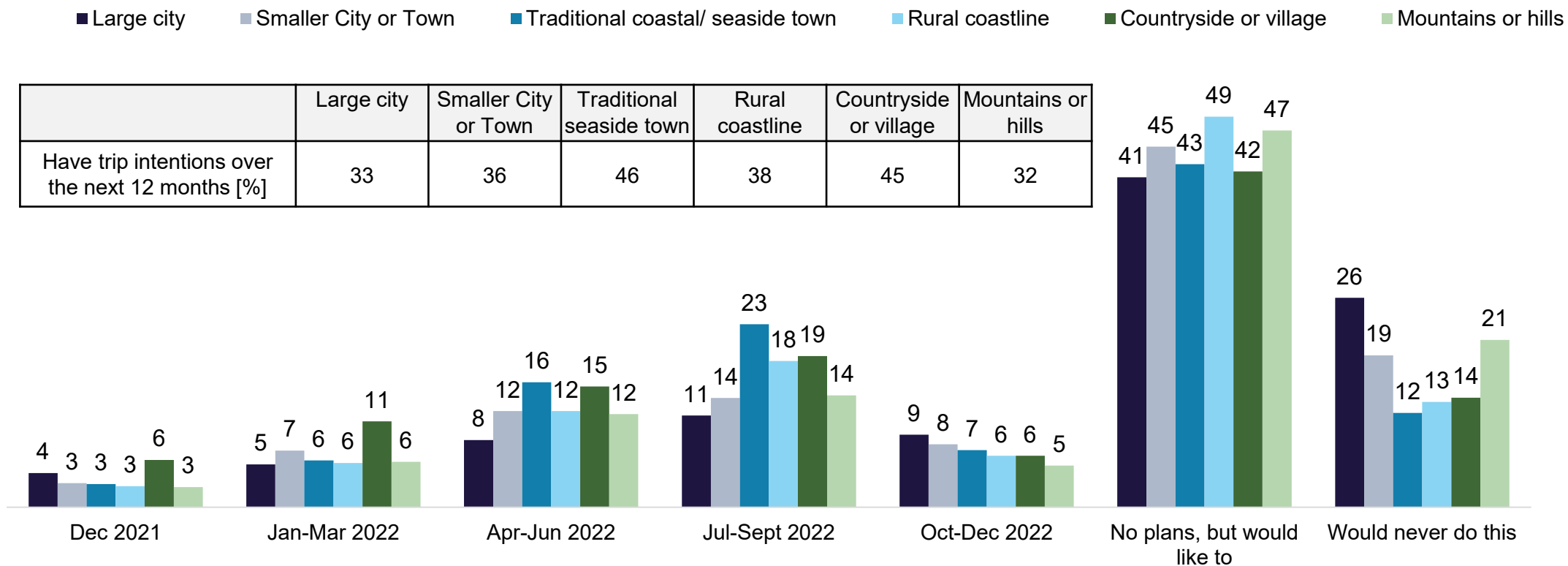
Figure 14. Barriers for taking an overnight OVERSEAS trip April to June 2022. Percentage, December 2021, UK



Overall UK overnight trips intentions by destination

Overnight domestic trip intention generally peaks in July to September 2022, particularly for destinations such as a 'traditional coastal/seaside town' and 'countryside or village' – 23% and 19% planning on taking a trip to these destination types respectively.

Figure 15. Overnight trips intentions in next year by destination type, Percentage, December 2021, UK





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3. Next Domestic Trip - Overnight and Day Trips

Planning and booking time for next UK / overseas overnight trips

The majority of January UK trips have already been *planned* with around 3 in 10 (29%) already *booked*. Generally, overseas trips are likely to be booked closer to the travel date than UK trips.

Figure 16. When anticipate **PLANNING** the next January-March 2022 UK and overseas overnight trip, Percentage of those not yet booked these trips, December 2021, UK

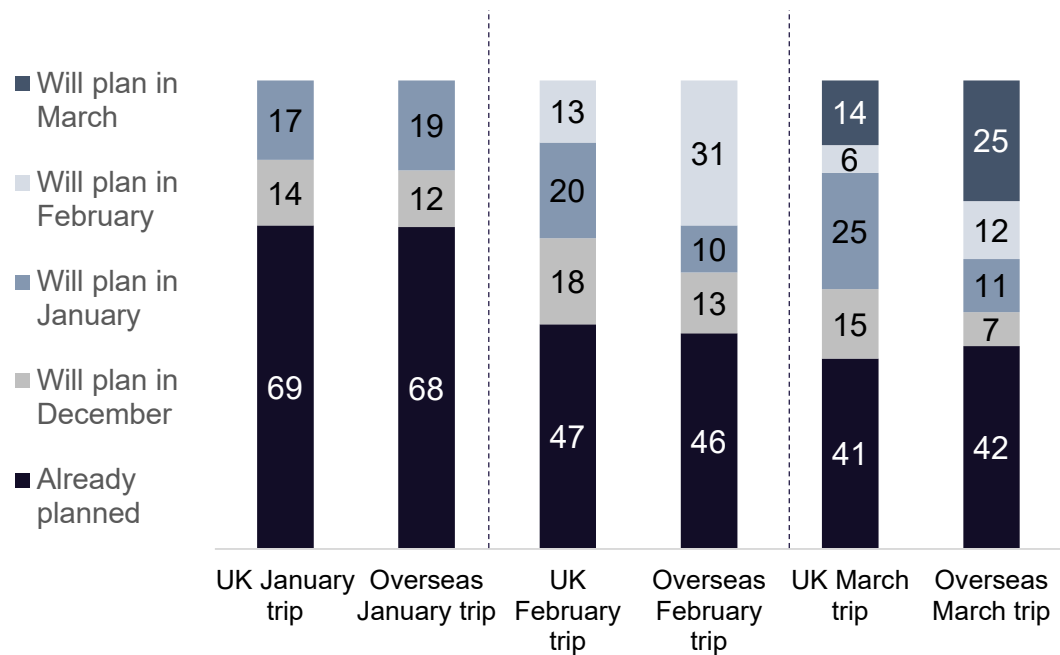
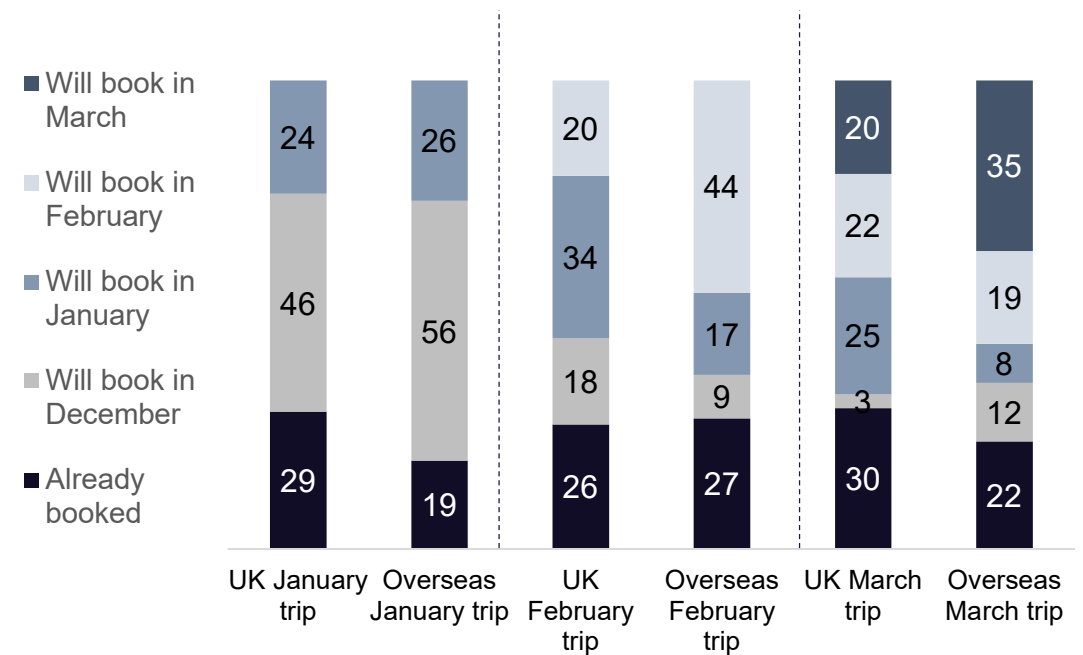


Figure 17. When anticipate **BOOKING** the next January-March 2022 UK and overseas overnight trip, Percentage of those not yet booked these trips, December 2021, UK

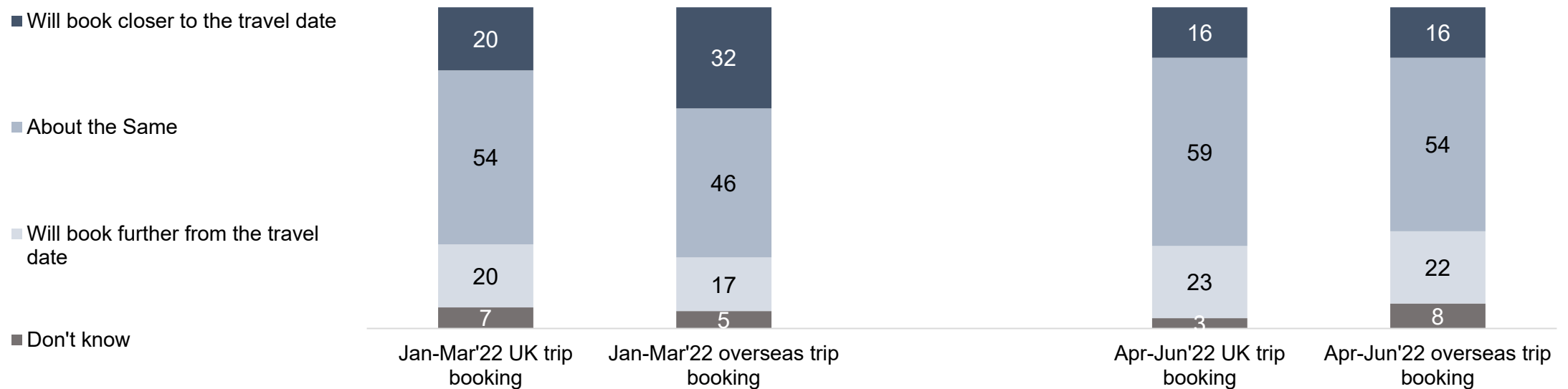


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip
 Base: January UK trips n=66, January Overseas trips n=64; February UK trips n=68, February Overseas trips n=37*; March UK trips n=100, March overseas trips n=54. *Low base size

Booking lead times for the next overnight trips, vs pre-pandemics

The next Overseas overnight Jan-Mar'22 trip is more likely (than domestic) to be booked closer to the travel date. Apr-Jun'22 trips' booking lead times show similar pattern for domestic and overseas.

Figure 18. Anticipated booking lead times for Jan-Mar'22 and Apr-Jun'22 trips compared to before the pandemic, Percentage, December 2021 UK

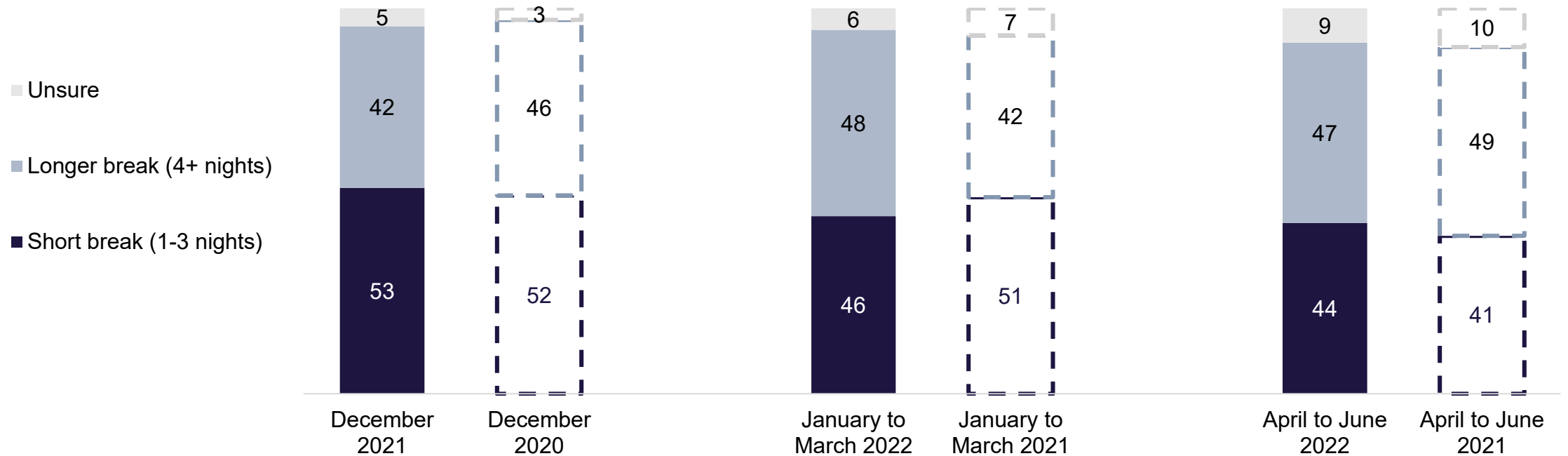


VB2f/h. Roughly how much time is there likely to be between you booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? *Lead times are based on trips that have not yet been booked
 Base Figure 11: Jan-Mar 2022 UK trip intenders n=165; Jan-Mar 2022 overseas trip intenders n=121; Apr-Jun 2022 UK trip intenders n=248; Apr-Jun 2022 overseas trip intenders n=196
 Base Figure 12: Jan-Mar 2022 UK trip intenders n=234; Jan-Mar 2022 overseas trip intenders n=155; Apr-Jun 2022 UK trip intenders n=299; Apr-Jun 2022 overseas trip intenders n=196

Duration of the next overnight trip in UK

Overnight UK trips planned for December 2021 are more likely to be short breaks than longer breaks of 4+ nights. From January to June 2022, the proportions of short and longer breaks are relatively even.

Figure 19. Length of next UK holiday or short break by time period, Percentage, December 2021, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All December 2021 respondents intending to take next holiday or short break in each time period: December 2021 n=71; January to March 2022 n=234; April to June 2022 n=299. December 2020 = 89; January to March 2021 n=200; April to June 2021 n=270

Where planning on staying on the next overnight trip in the UK

London is the preferred UK destination for overnight trips between December'21 and March'22 (20% of intenders planning a trip there), while for April to June'22, the South West of England is at the top (20% planning a trip there).

Figure 20. Where planning on staying on next UK overnight trip in December 2021 to March 2022, Percentage, November and December 2021, UK

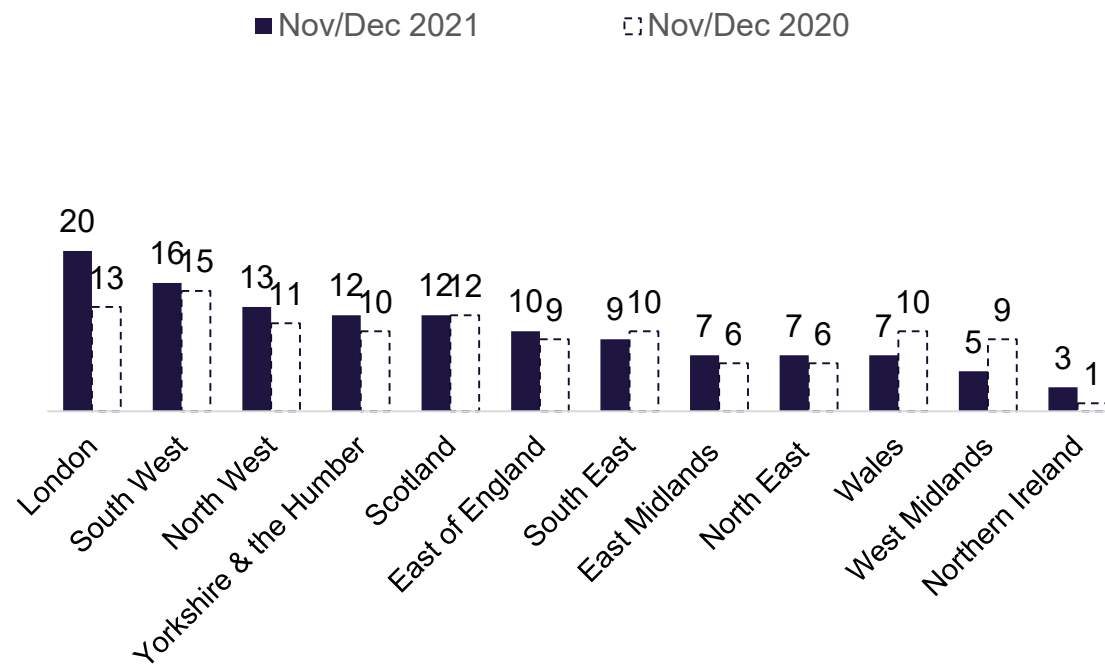
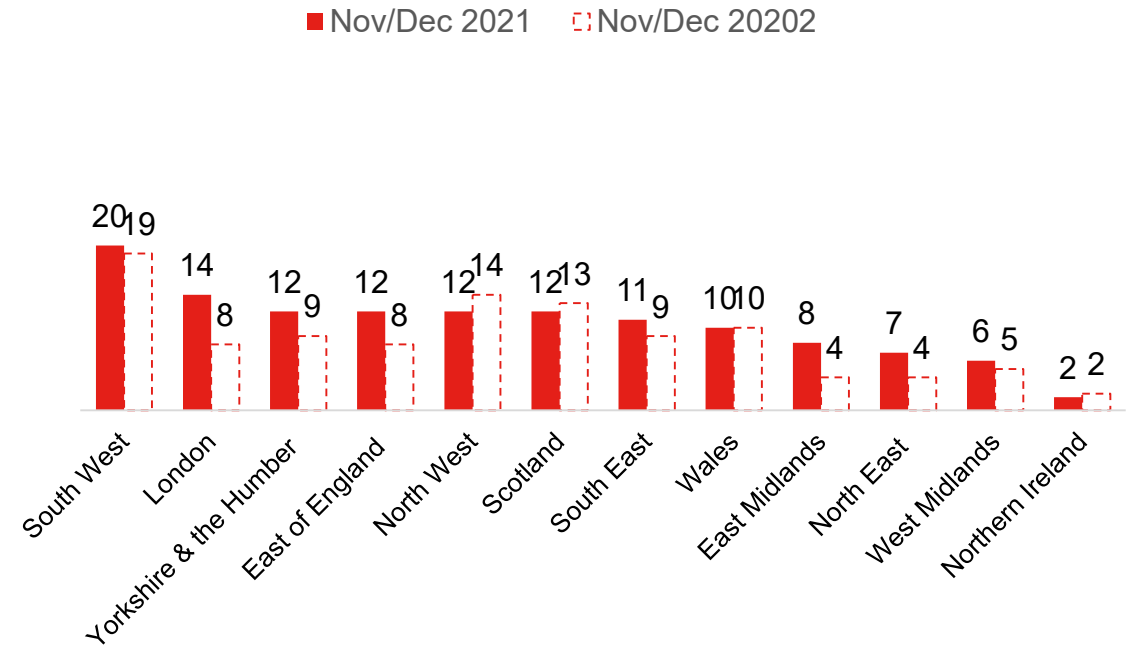


Figure 21. Where planning on staying on next UK overnight trip in April to June 2022, Percentage, November and December 2021, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All November and December 2021 respondents planning on taking a holiday or short break in the UK between December 2021 to March 2022 n=581; April to June 2022 n=585; November and December 2020 respondents: December to March 2020 n=483, April to June n=516.

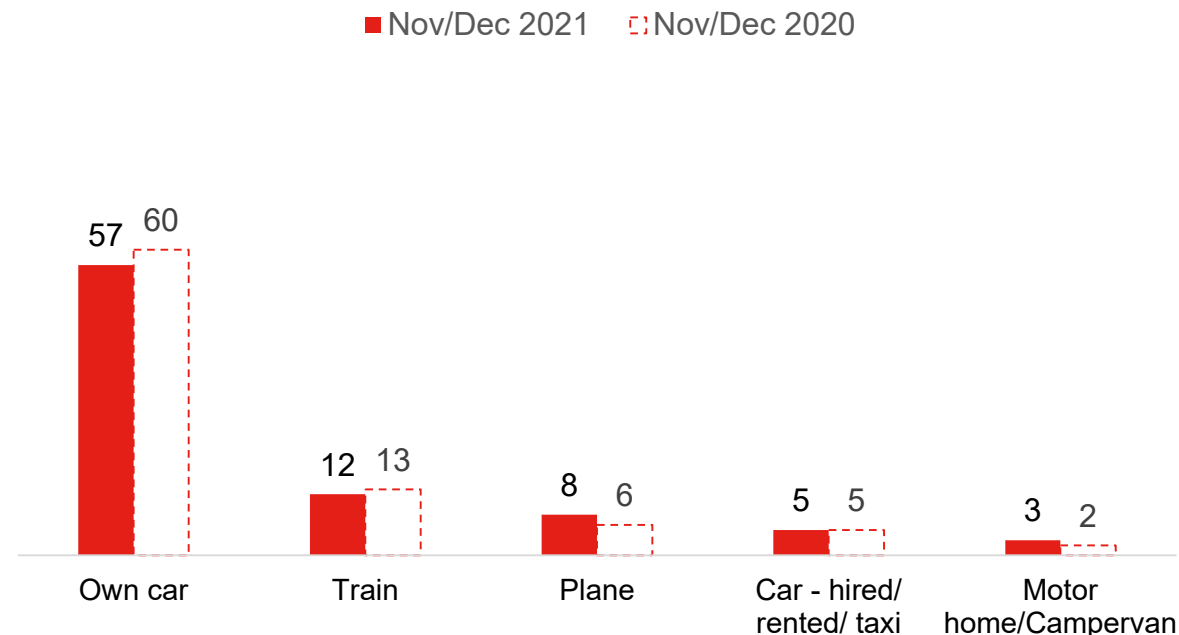
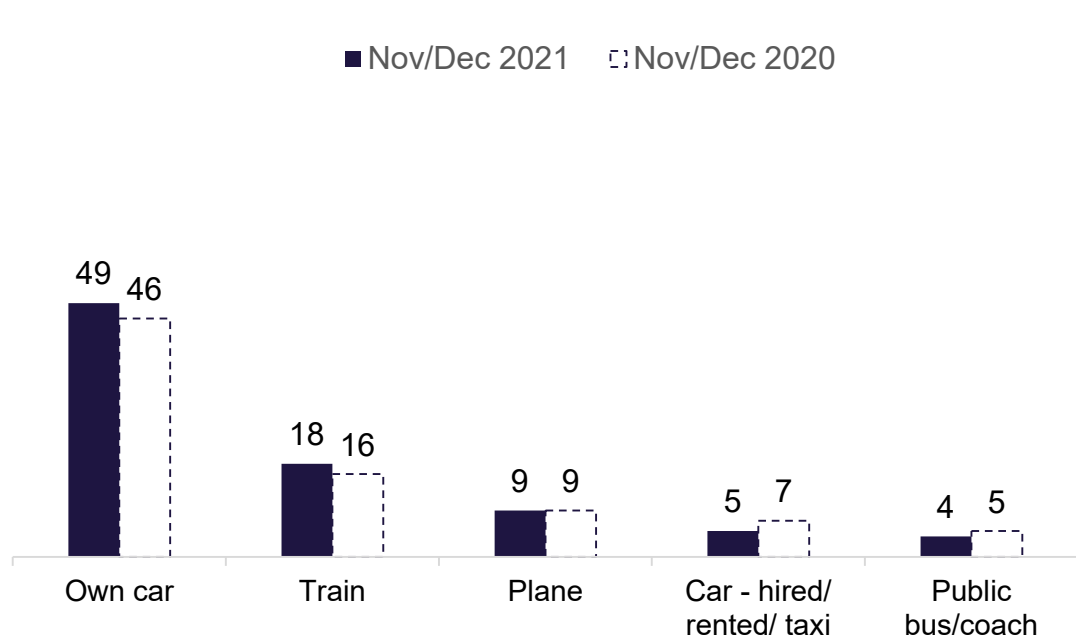
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Main mode of transport for the next overnight trip in the UK

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

Figure 22. Top 5 main modes of travel to destination for trip in December 2021 to March 2022, Percentage, November/December 2021, UK

Figure 23. Top 5 main modes of travel to destination for trip in April to June 2022, Percentage, November/December 2021, UK



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

Base: All November and December 2021 respondents planning on taking a holiday or short break in the UK between December 2021 to March 2022 n=581; April to June 2022

n=585; November and December 2020 respondents: December to March 2020 n=483, April to June n=516.

Accommodation type for the next overnight trip in the UK

'A private home' is the leading accommodation choice for December'21 to March'22 (at 47%) with 'commercial rental' close behind (45%). Between April and June'22, 'camping/caravan' is the leading accommodation choice (43%).

Figure 24. Accommodation planning on staying in on next UK overnight trip in December 2021 to March 2022, Net Percentage, November/December 2021, UK

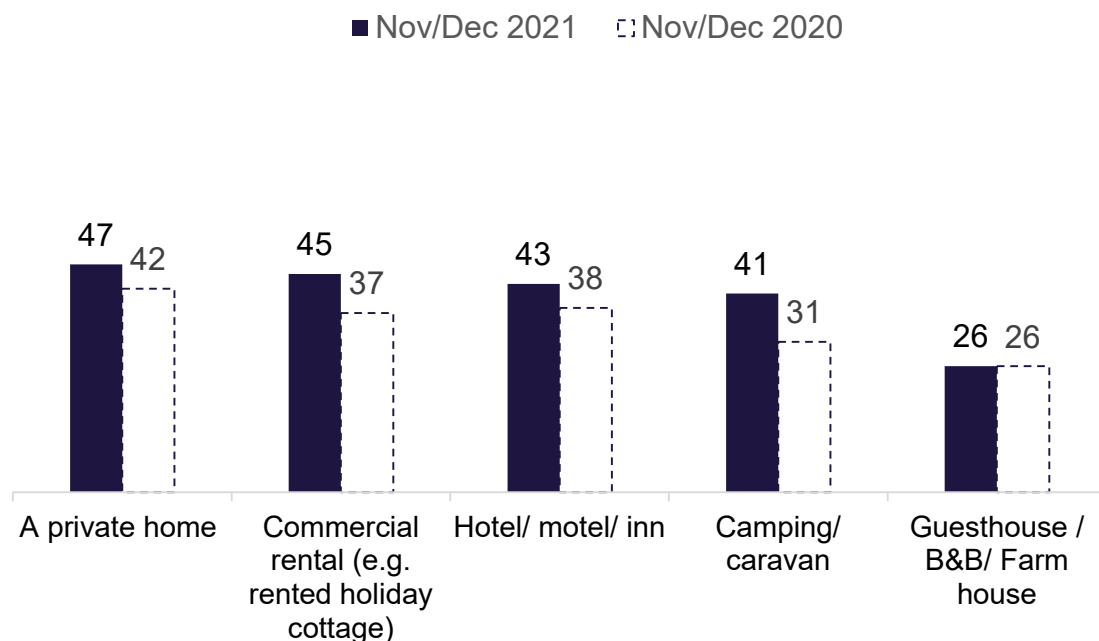
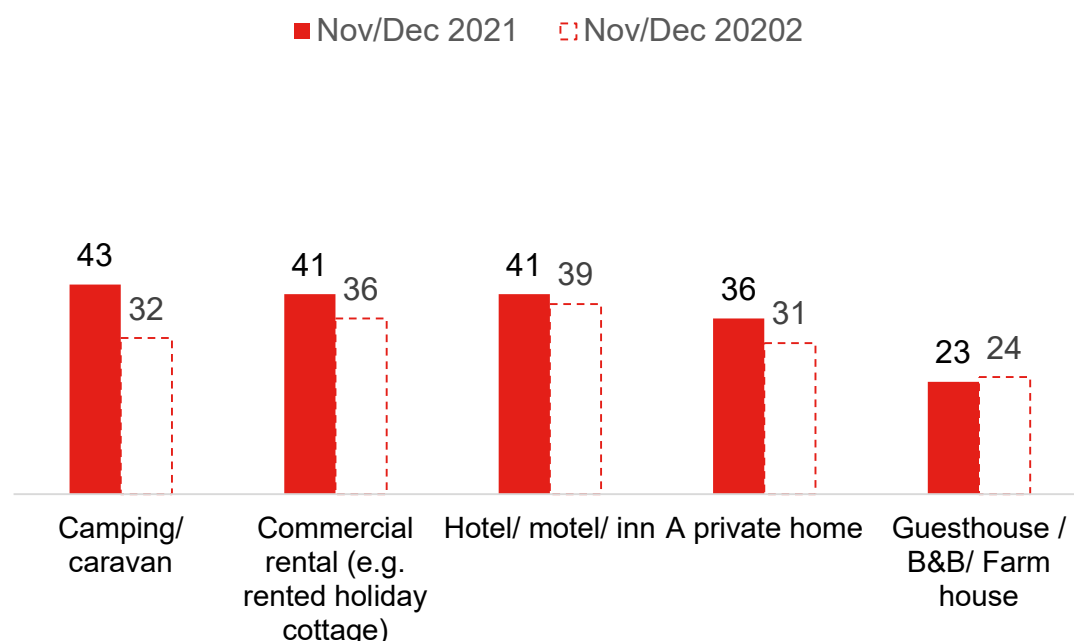


Figure 25. Accommodation planning on staying in on next UK overnight trip in April to June 2022, Net Percentage, November/December 2021, UK



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

Base: All November and December 2021 respondents planning on taking a holiday or short break in the UK between December 2021 to March 2022 n=581; April to June 2022 n=585; November and December 2020 respondents: December to March 2020 n=483, April to June n=516.

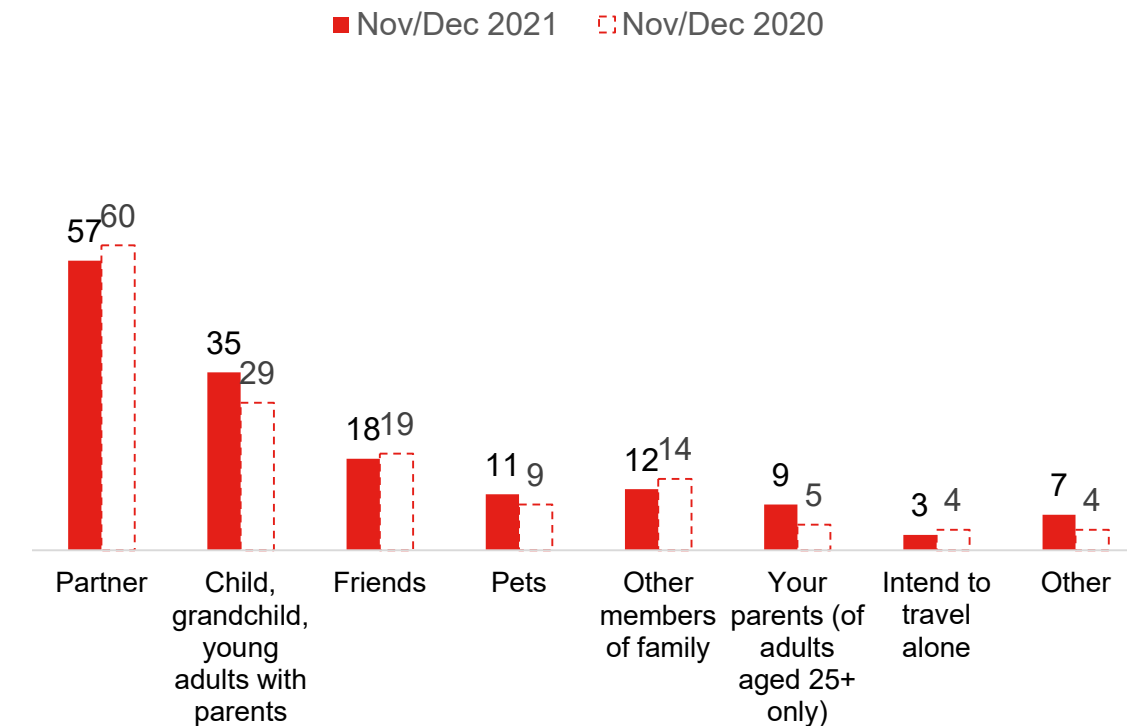
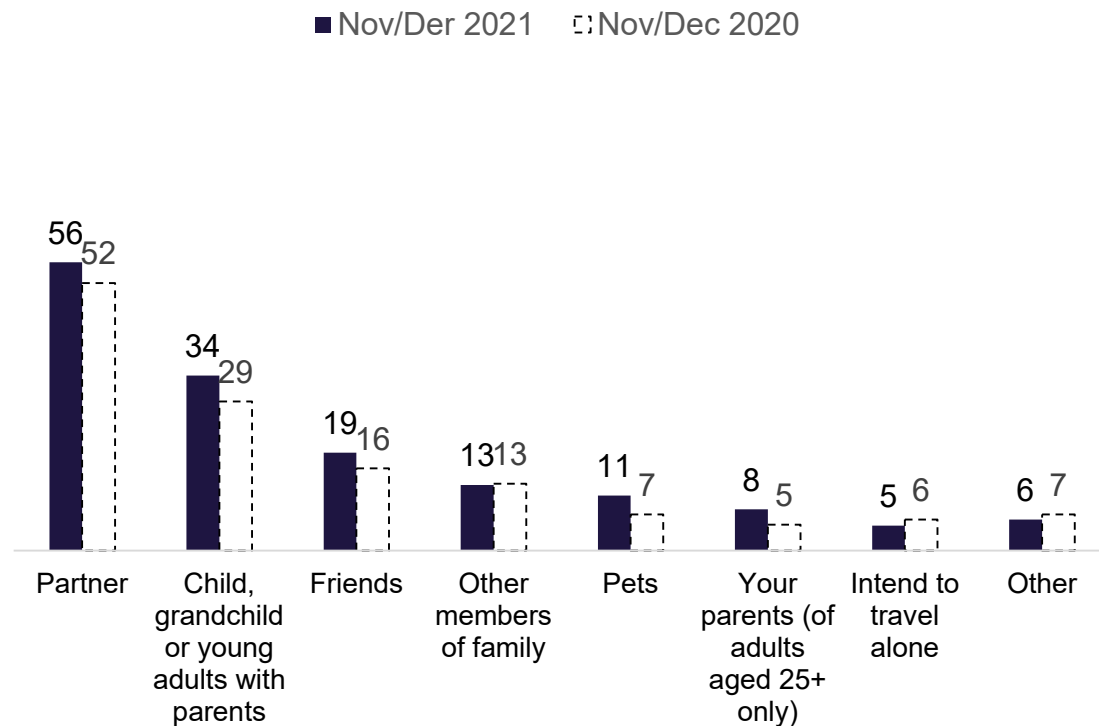
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation

Visitor party make-up for the next overnight trip in the UK

‘Partner’ is the leading visitor party member for both time periods, followed by ‘child, grandchild or young adult with parent’, and ‘friends’.

Figure 26. Visitor party make-up for trips taken from December 2021 to March 2022, Percentage, November/December 2021, UK

Figure 27. Visitor party make-up for trips taken from April to June 2022, Percentage, November/December 2021, UK



QVB4d. With whom are you likely to be spending your holiday?

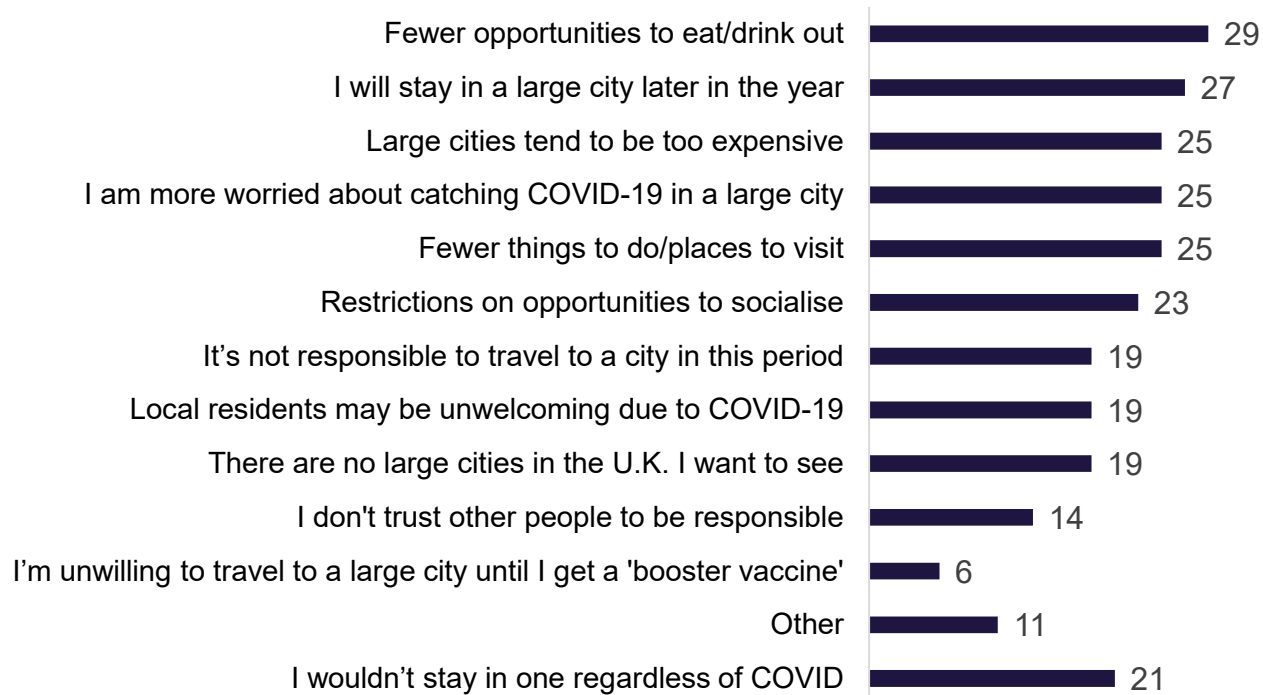
Base: All November and December 2021 respondents planning on taking a holiday or short break in the UK between December 2021 to March 2022 n=581; April to June 2022 n=585; November and December 2020 respondents: December to March 2020 n=483, April to June n=516.

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

Reasons for not staying in a city on the next UK trip

For the December to March intenders not planning on visiting a large city, the leading reasons are 'fewer opportunities to eat/drink out' and 'I will stay in a large city later in the year'.

Figure 28: Reasons for not staying in a city amongst December'21 to March'22 intenders, Percentage, December, UK



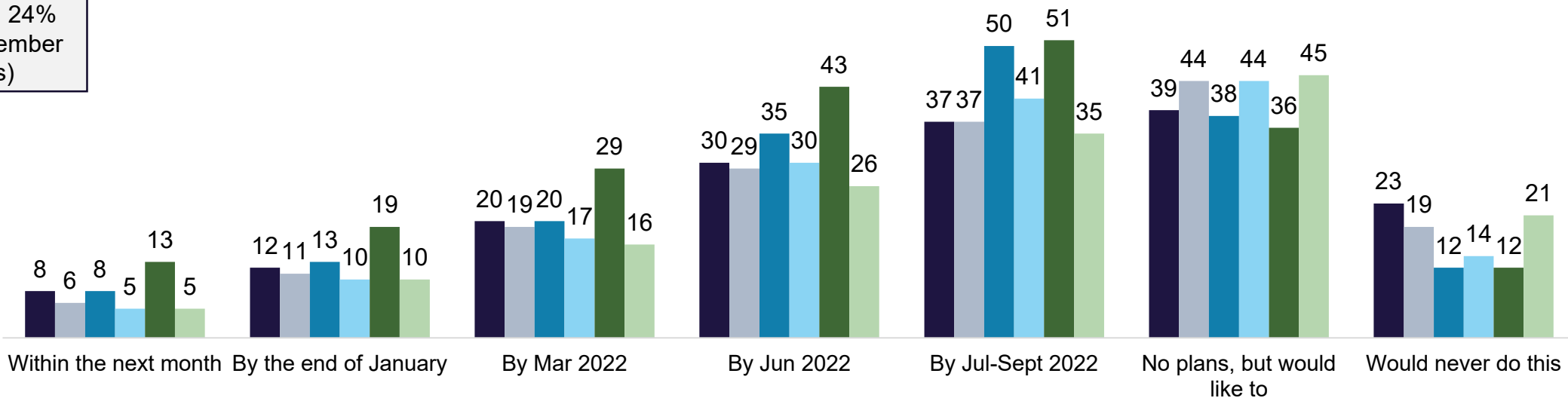
Next UK day trip intention by destination type

24% of UK adults intend to take any type of day trip by the end of the month. 'Countryside or village' is the destination type most likely to generate a day trip in all time periods. However, by summer, 'traditional coastal/ seaside town' picks up.

Figure 29. Next UK day trip intention between December 2021 and September 2022, Cumulative percentages, December 2021, UK

■ Large city ■ Smaller City or Town ■ Traditional coastal/ seaside town ■ Rural coastline ■ Countryside or village ■ Mountains or hills

Any day trip by end of the month: 24% (22% for November intentions)





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4. Overnight Business Trip Intentions

Intentions for overnight business trips in the next three months

20% of UK adults in employment plan on taking an overnight business trip in the next 3 months (up 4 percentage points on November 2021). 'Conference/conventions/congress' is the leading reason for taking one, followed by 'meeting with 6 or more people'.

Figure 30. Proportion anticipating an overnight business trip in next 3 months, Percentage, December 2021, UK adults in employment

81% of UK adults interviewed are in employment

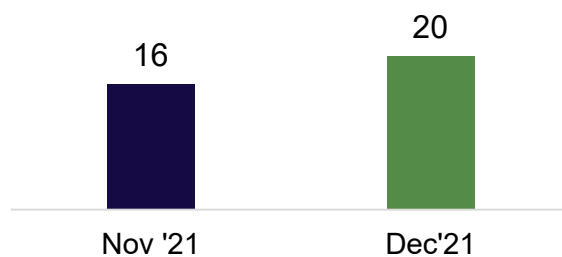
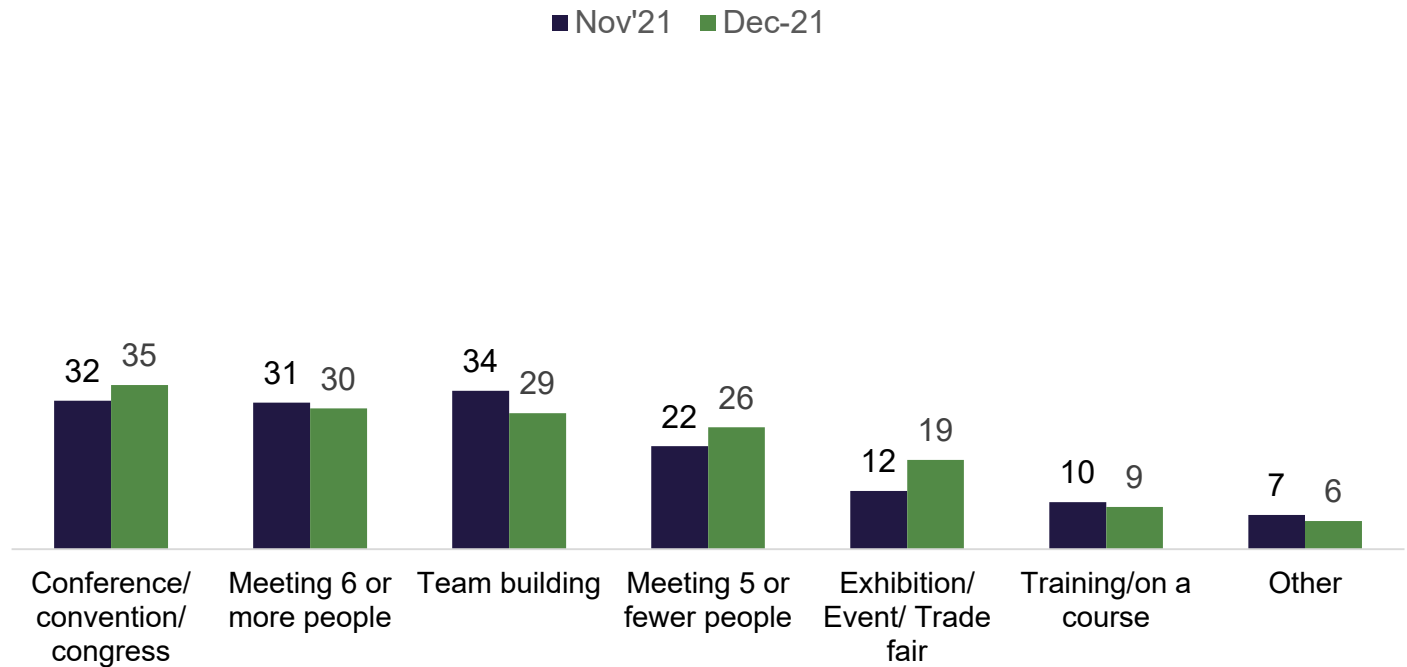


Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, December 2021, UK adults in employment planning a trip



VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer 'no'. Please also answer 'no' if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office). Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.

VB14b: What would be the main reason for this overnight business trip? Base: December respondents currently in employment n = 1281. All taking a business trip n=274



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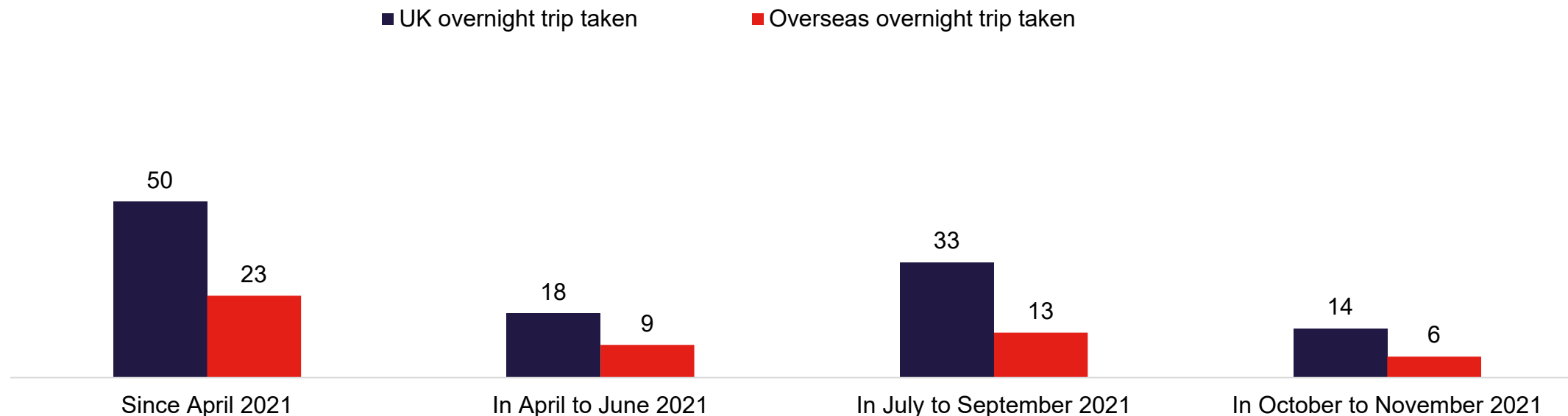
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5. Past UK vs Overseas Trips

Proportion taken a UK and overseas trip since April 2021

Half (50%) of UK adults have taken an overnight UK trip since April, more than twice as many as have taken an overseas overnight trip in that period (23%). Both types of trips are most likely to have been taken between July and September.

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, December 2021, UK



VB13a/v. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas since the start of April 2021?

VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK since the start of April 2021?

Base: All respondents. December 2021 = 1,756

Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

Where stayed and purpose of last UK overnight trip

The South West of England was the most popular destination for trips since September, 19% of trip takers having gone there. Holiday / leisure was the most stated purpose.

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

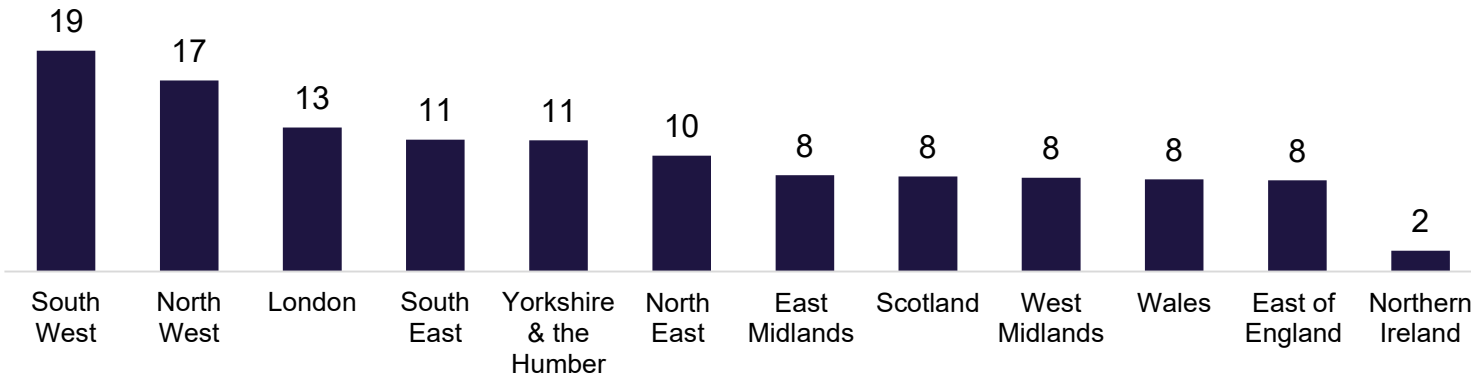
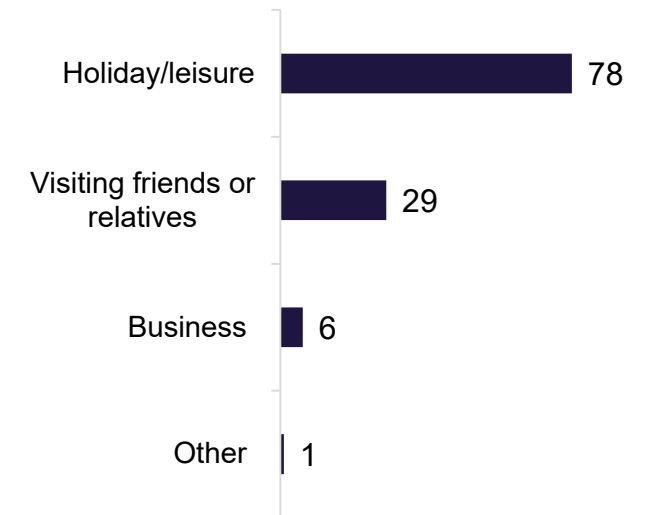


Figure 34. Purpose of overnight UK trip taken since September, Percentage, December 2021, UK



VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH >?

Base: All December 2021 respondents that took an overnight trips between July and August n=316; Since September n=358

Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose



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Methodology

Methodology

- This report presents findings from the December 2021 wave of the COVID-19 consumer sentiment tracker, with comparisons to previous months where appropriate.
- The survey is conducted online, among a sample of the UK adult population.
- In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
- December 2021 fieldwork was conducted between 1-7 December 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.