

COVID-19 Consumer Weekly Tracker

Week 4

Fieldwork Period: 8-12 June 2020

U.K. Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.
- The survey addresses: the likelihood of U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.
- This tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales. The survey is repeated across a 13 week period with the first wave published on 1 June 2020.
- The results are made publicly available and updated each week at the following website:
<https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>

Week 3: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

* Represents a significant change on previous week

Key Metrics	Week 3	Week 4	Weekly Shift
National mood (average score out of 10)	6.6	6.6	+/-0.0
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	27%	31%	+4*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.33	2.33	+/-0.00
Normality score (proportion expecting normality by September)	29%	23%	-6*
The <u>main</u> reasons for not feeling confident about taking a trip between June-August (Top 2)	1. Gov't guidance on travel restrictions 2. Fewer opportunities to eat/drink out	1. Gov't guidance on travel restrictions 2. Fewer opportunities to eat/drink out	No change

Table 2. Top line Metrics – General short break and holiday intentions

Key Metrics	Week 3	Week 4	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-27	-29	-2
Anticipated number of U.K. holidays compared to normal (% net)	-30	-30	+/-0
UK near-term holiday/short break confidence (June and July-August)	16%/28%	5%/33%	NA^
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	73%	77%	NA^
Proportion going on a UK short break <i>or</i> holiday between June-Sept	23%	22%	-1
Split between <u>holiday</u> / <u>short break</u> / <u>don't know</u> for next trip between June-Sept	42%/54%/4%	40%/53%/7%	-2/-1/+3

^ Question wording changed in week 4

Week 3: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Specific short break and holiday plans

* Represents a significant change on previous week

<u>Key Metrics</u>	Week 3	Week 4	Weekly Shift
Leading England destination likely to stay in between June - Sept	South West	South West	No change
Main <i>type</i> of destination likely to stay in between June - Sept	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between June - Sept	Caravan/camping	Caravan/camping	No change

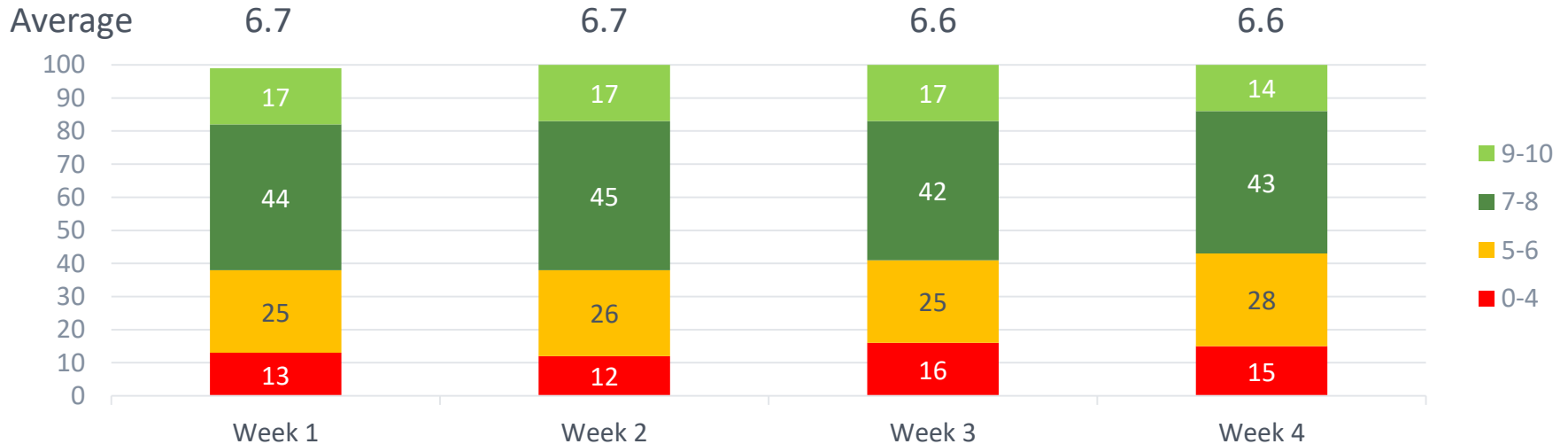
Table 4. Top line Metrics – Broader leisure activity

<u>Key Metrics</u>	Week 3	Week 4	Weekly Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

The national mood and perceptions of the situation in relation to COVID-19

- The average mood of UK residents is 6.6 out of 10, consistent with week 3, and very marginally lower than weeks 1 and 2
- Only 14% gave their mood a score of 9-10/10, which is significantly lower than in the previous three weeks of research

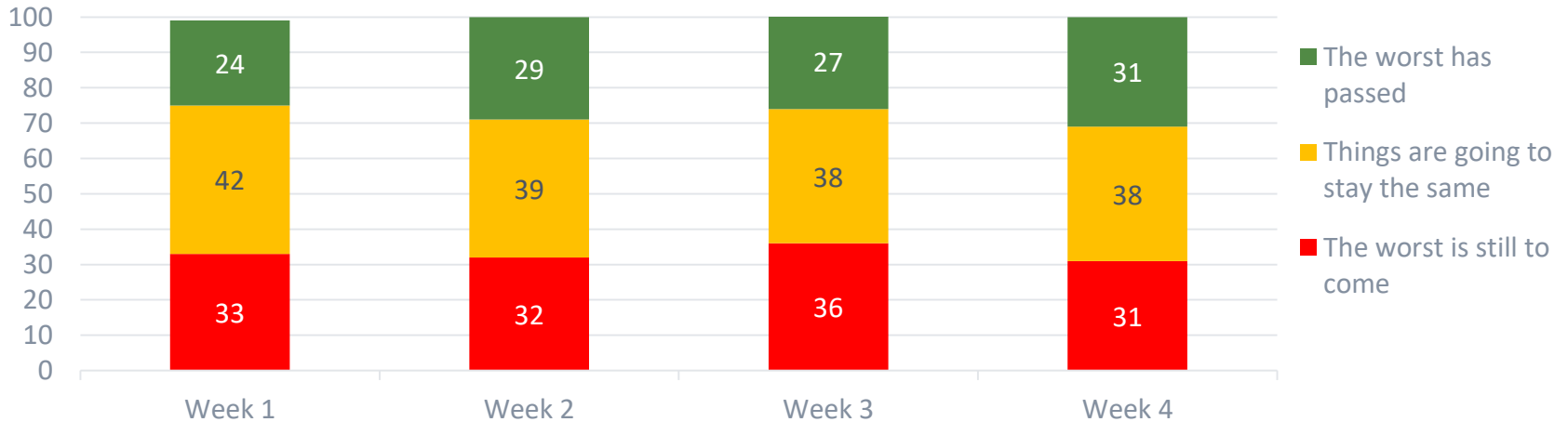
Figure 1. Current mood out of 10, Percentage week-on-week, UK



The national mood and perceptions of the situation in relation to COVID-19

- Despite a slightly lower mood than week 3, a significantly higher proportion of the U.K. population think that the worst has passed in relation to COVID-19 (31% compared to 27% in week 3) and significantly fewer think the worst is still to come (31% compared to 36%)

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



Perceptions of when things will return to 'close to normal'

- 23% of U.K. residents believe that life will return to 'something close to normal' by September. This is a significantly lower proportion than in the previous three weeks of research
- 49% think that normality will return by December, also lower than previous weeks, but not significantly so.

Figure 3. Perceptions of when things will return 'close to normal'
Percentage Week 4, UK

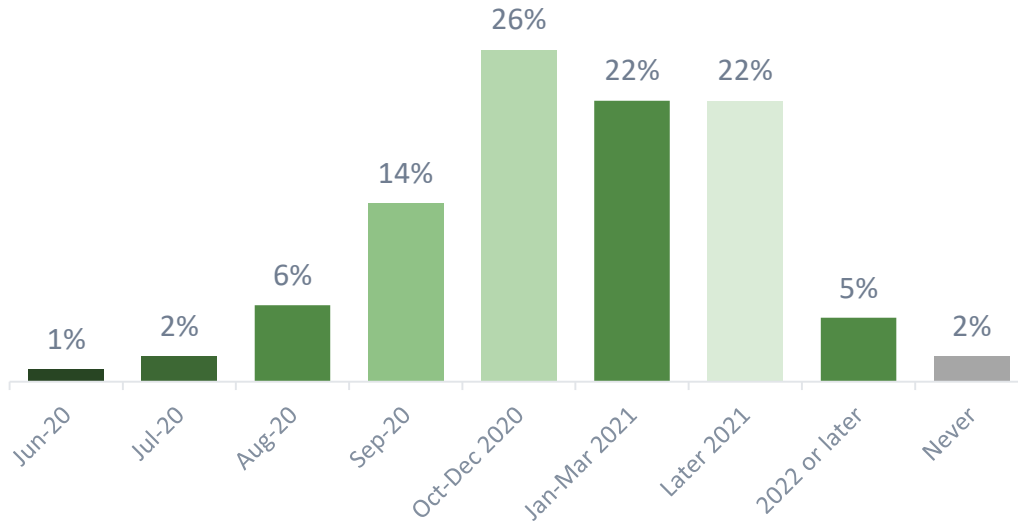


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

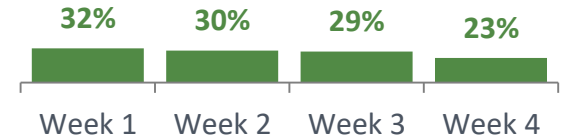
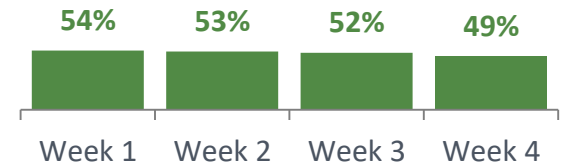


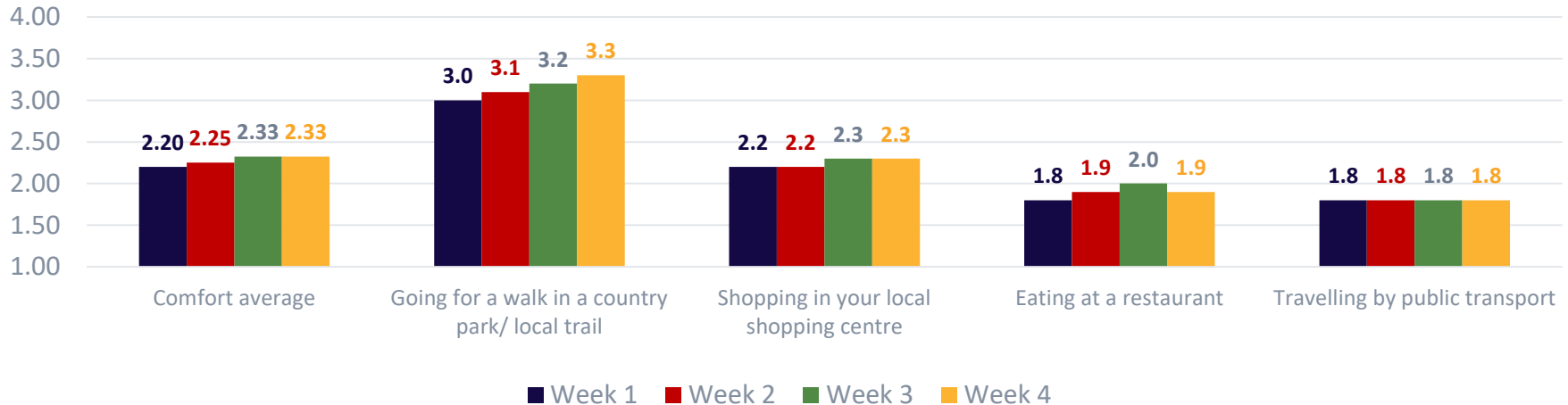
Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK



Level of comfort undertaking 'everyday' activities with a 'comfort average'

- The 'appetite for risk' score stands at 2.33 out of 4 (4 representing 'very comfortable'), identical to the figure reported in week 3 of the research
- Britons are feeling most comfortable with 'going for a walk in a country park/local trail' (3.3) - a score that has increased for the third consecutive week. Levels of comfort with 'shopping in your local shopping centre' remain at 2.3, whilst comfort with 'eating at a restaurant' has dropped marginally to 1.9. Comfort with travelling by public transport remains low and is at 1.8 for the fourth consecutive week.

Figure 6. Level of comfort conducting a range of activities separately and combined, Average Score week-on-week where 1= not at all comfortable doing activity and 4= very comfortable doing activity, UK



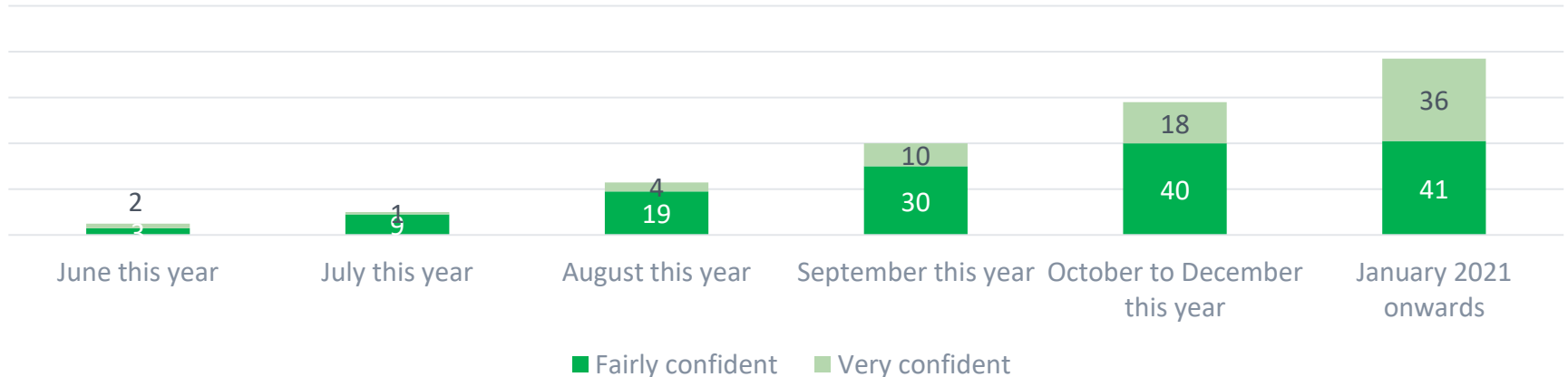
VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?

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. 'Net: comfort average' is calculated as a straight average of the four scores. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746

Confidence in the ability to take a U.K. short break or holiday

- NOTE: This question has been slightly modified compared to previous weeks. The time periods for the summer period have been broken out into single months, and an introduction added so the respondent answers from the perspective of having intent to take a short break or holiday.
- A minority of Britons are confident that they would be able to take a U.K. short break or holiday in June (5% confident) or July (10%). Confidence increases for periods later in the year - for August confidence is 23% and September, 40%.
- The majority are confident they'd be able to take a U.K. trip between October and December this year (58%) and from January 2021 onwards (77%).

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 4, UK



Reasons for not feeling confident about taking trips in the U.K. – Top 5

- ‘Restrictions on travel from government’ is the leading reason for lack of confidence in taking trips in the U.K. between June and September (52% stating this) followed by ‘fewer opportunities to eat/drink out’ (50%).
- From October onwards, concerns about catching COVID-19 is the biggest reason for lack of confidence (44%), followed by restrictions on travel from government (41%).

Figure 8. Top 5 reasons for not being confident about travelling between June to September, Percentage Week 4, UK

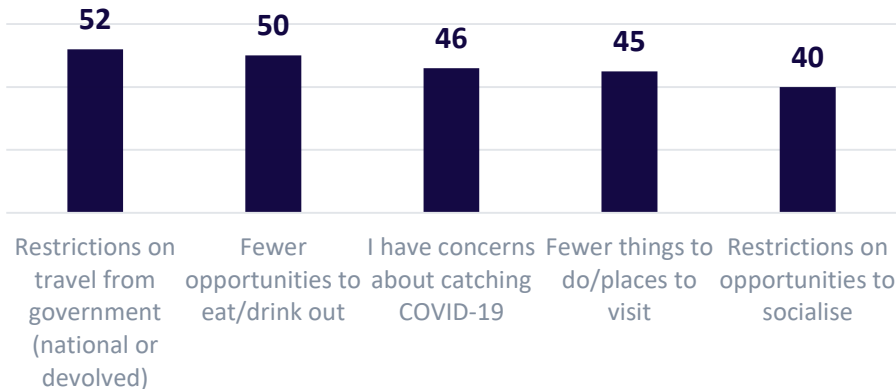
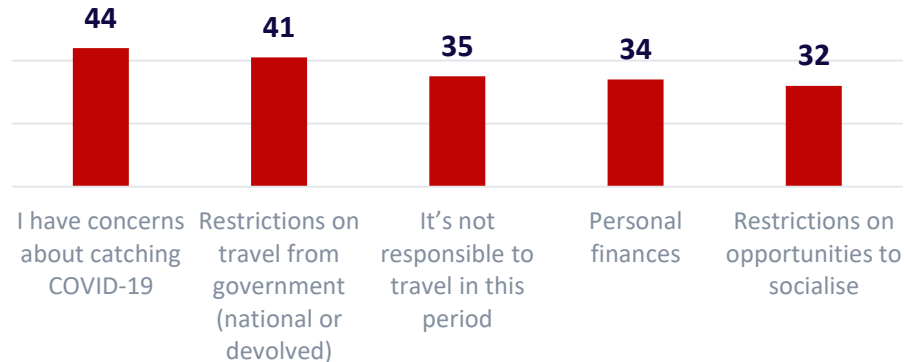


Figure 9. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 4, UK



Anticipated number of U.K. trips this year compared to normal

- Compared to normal, U.K. adults anticipate taking fewer short breaks (net -29) and holidays of 4+ nights (net -30) in the UK between now and the end of 2020.
- This proportion is virtually unchanged from previous weeks.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 4, UK

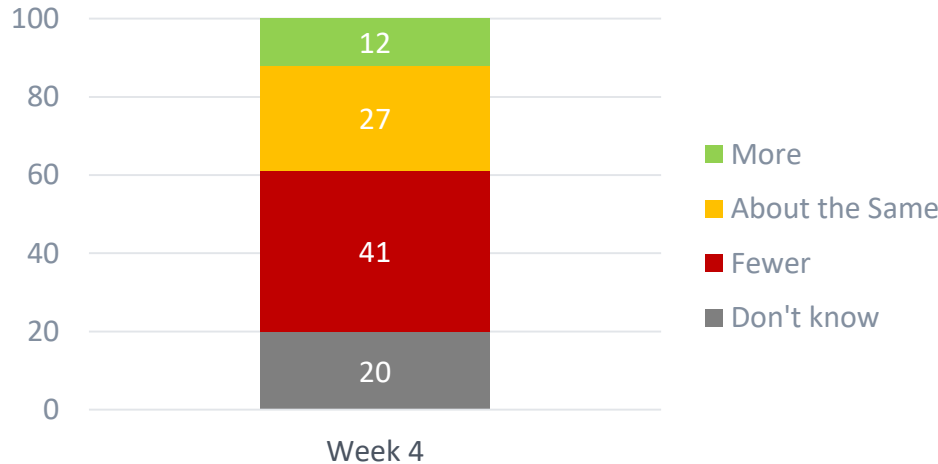
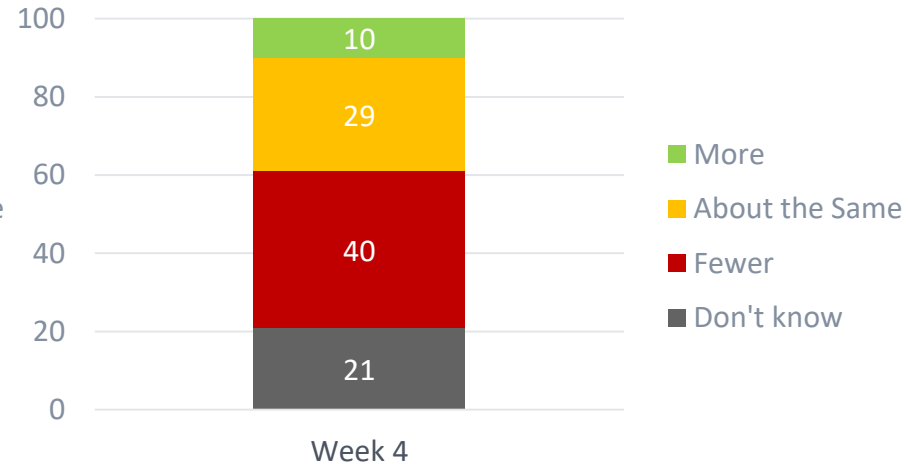


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 4, UK



Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults also anticipate taking fewer overseas short breaks (net -41) and holidays (also -41) by the end of the year compared to normal.
- Again, this is largely unchanged from the previous week, with the negative intent for overseas trips continuing to be significantly more pronounced than for domestic.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 4, UK

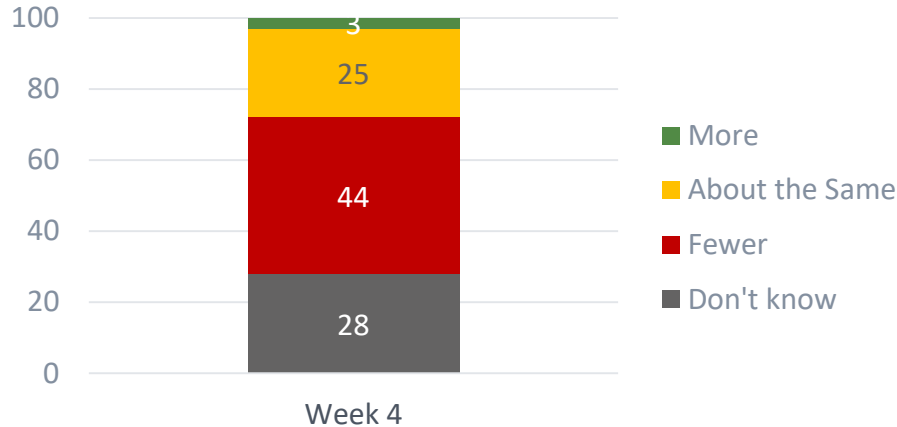
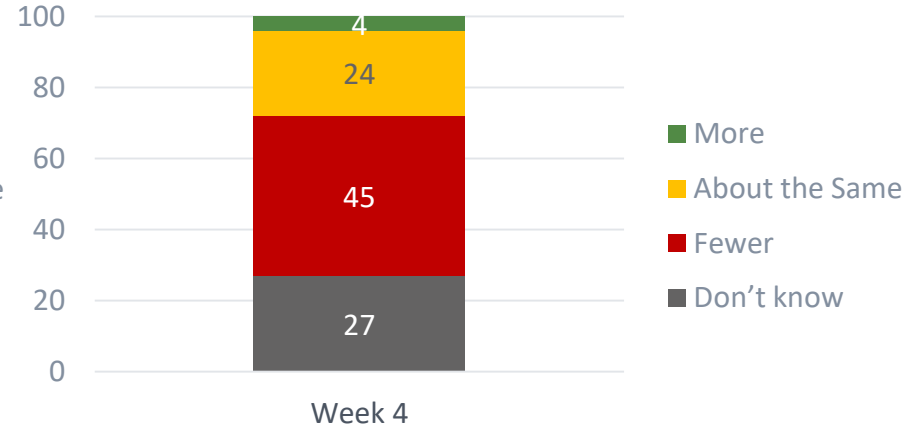


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 4, UK



When anticipating to plan and book next U.K. short break or holiday

- 43% of U.K adults say they have either already planned or intend to plan a U.K. short break or holiday by September. 36% have already booked or intend to book their trip by this time.
- These proportions are marginally up on last week (40% and 35%, respectively).

Figure 14. When anticipate PLANNING next UK holiday or short break, Percentage Week 4, UK

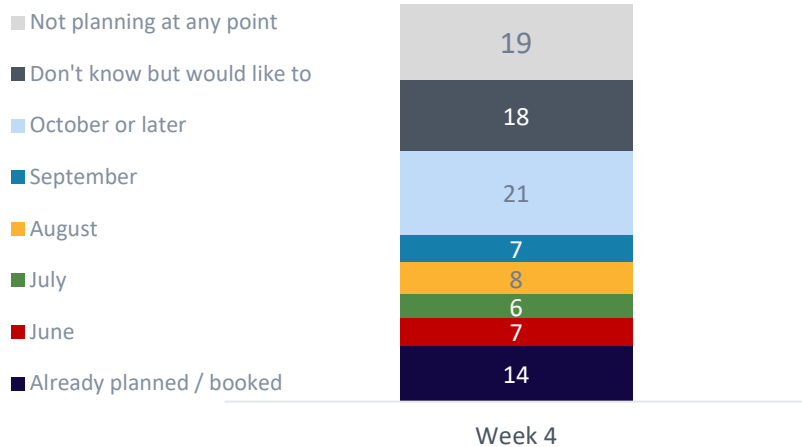
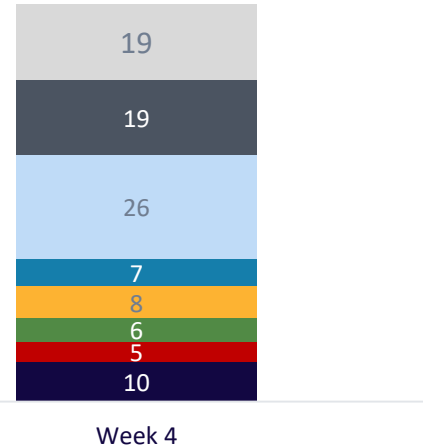


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 4, UK



When anticipating going on next U.K. short break or holiday

- 22% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, broadly consistent with the proportion intending to do so in weeks 2 and 3 of the research.
- 40% plan on taking their next UK trip in October or later (versus 36% in week 3) while 19% remain unsure when they will do so (down from 22% in week 3).

Figure 16. When anticipate GOING on next UK trip, Percentage Week 4, UK

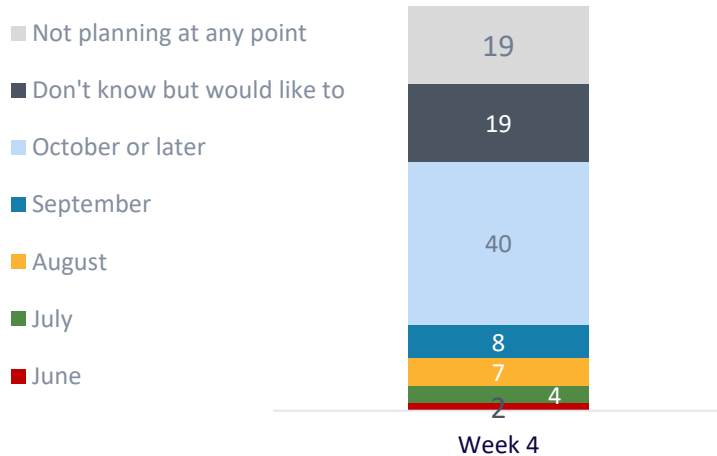
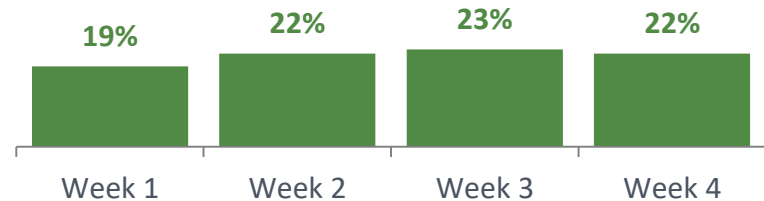


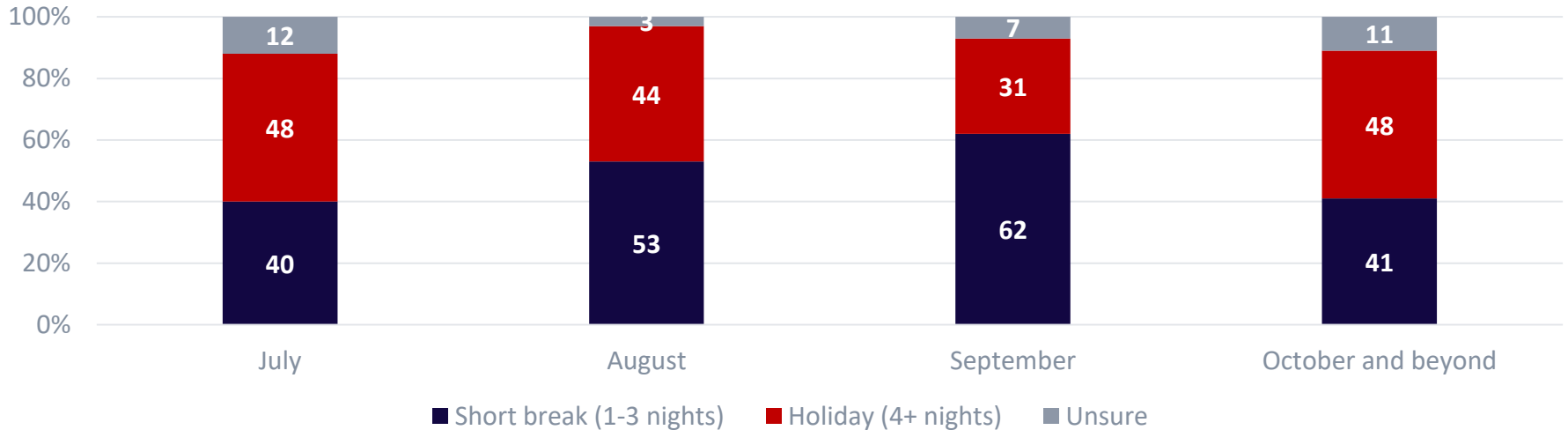
Figure 17. Proportion expecting to go on next UK trip by September, Percentage week-on-week, UK



When planning on taking next UK holiday or short break, by trip length

- Holidays of 4+ nights make up the majority of U.K. trips in July and from October onwards. In August, trips are slightly more likely to be in the form of short breaks (53%), although the difference with holidays of 4+ nights is not statistically significant.
- In September the majority of trips (62%) are likely to be short breaks, which is significantly higher than the 31% anticipating taking 4+ night holiday.

Figure 18. Length of next UK holiday or short break by time period, Percentage Week 4, UK



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

Base: All week 4 respondents intending to take next holiday in each time period July n=66, August n=121, September n=142, October and beyond n=698

June excluded due to small base sizes

Where planning on staying on next U.K. short break or holiday

- The South West is most likely to attract domestic visitors between June and September this year (19% intending to do so). This is followed by Scotland (12%), which is one of five regions and nations that have intent spanning a narrow range between 10%-12%.
- The South West and Scotland also lead for trips from October onwards, followed by London and the North West.

Figure 19. Where planning on staying on next UK overnight trip in June to September, Percentage Week 2-4 merged data, Top 10, UK

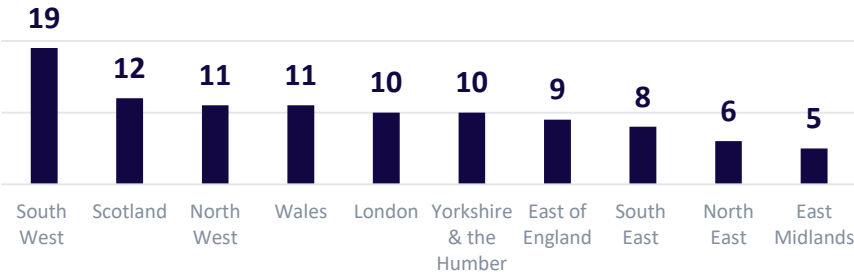
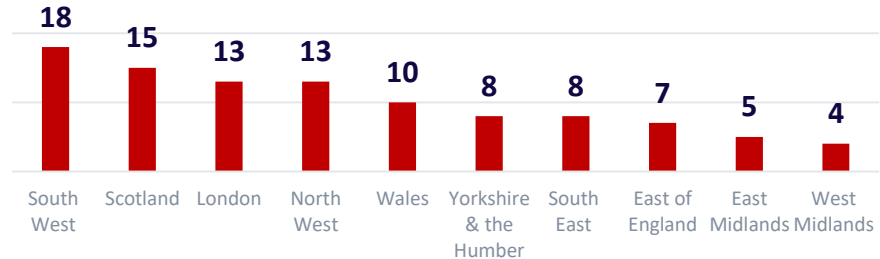


Figure 20. Where planning on staying on next UK overnight trip from October onwards, Percentage Week 2-4 merged data, Top 10, UK



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

Base: All week 2-4 respondents planning on taking a holiday or short break in the UK between June and September n=1,097 and from October onwards n=1,973. Three weeks of research merged to increase statistical reliability

Main mode of transport for next U.K. short break or holiday

- Across both time periods, 'own car' is by far the leading mode of transport – for 67% of trips between June and September, and 63% from October onwards. Train is the second most preferred mode across both periods, followed by plane.
- Anticipated use of the car is up from 56% versus week 3 (for June-Sept trips) while intent to take a train has decreased significantly.

Figure 21. Top 5 main modes of travel of destination for trip in June to September, Percentage Week 4, UK

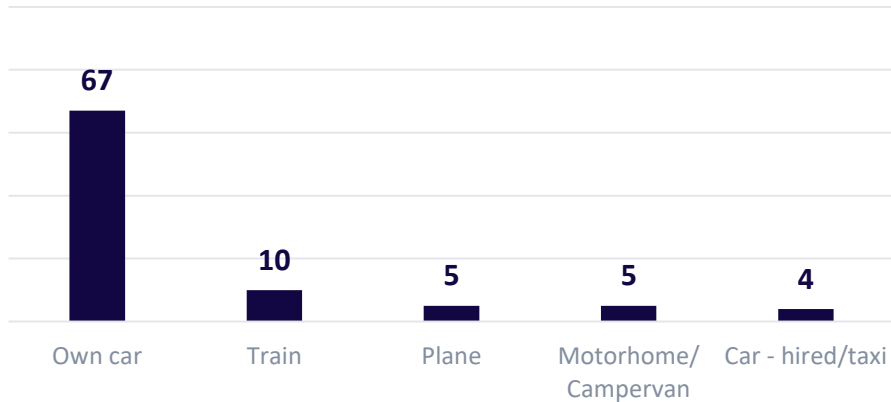
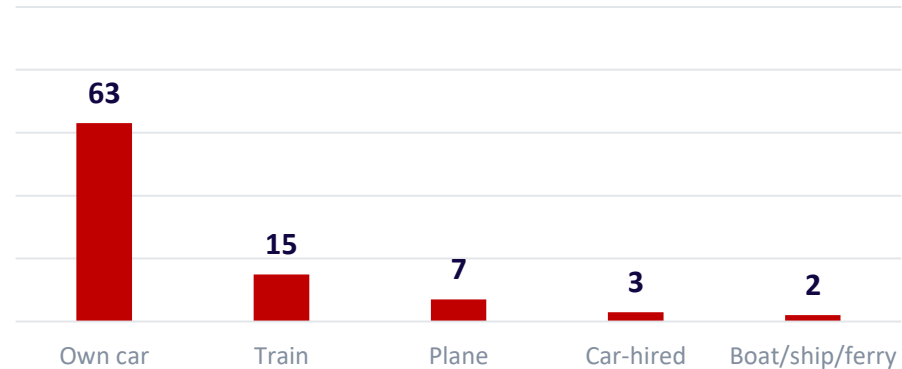


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 4, UK



Type of destination for next U.K. short break or holiday

- ‘Countryside or village’ (32%) and ‘traditional coastal/seaside town’ (30%) are the two main destination types for a trip between June and September. ‘City or large town’ (25%) and ‘rural coastline’ (23%) are the next most preferred destination types
- From October onwards, ‘city or large town’ gains favour with 30%, although it’s beaten into second place by ‘countryside or village’.

Figure 23. Main type of destination for trip in June to September, Percentage Weeks 2-4 merged data, UK

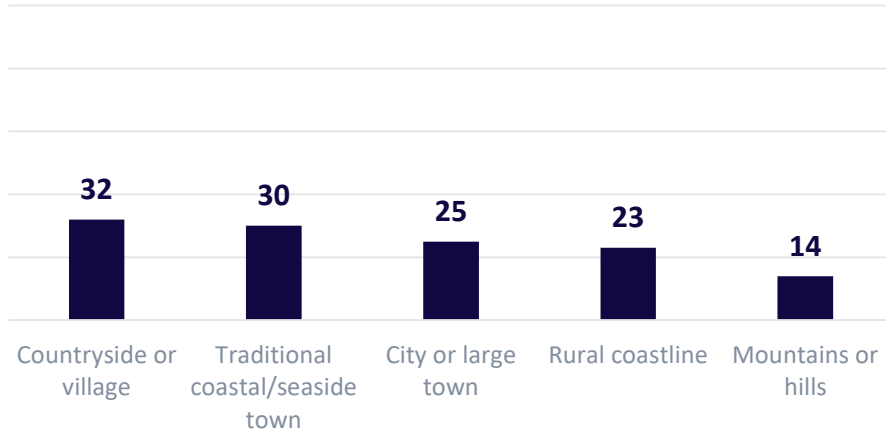
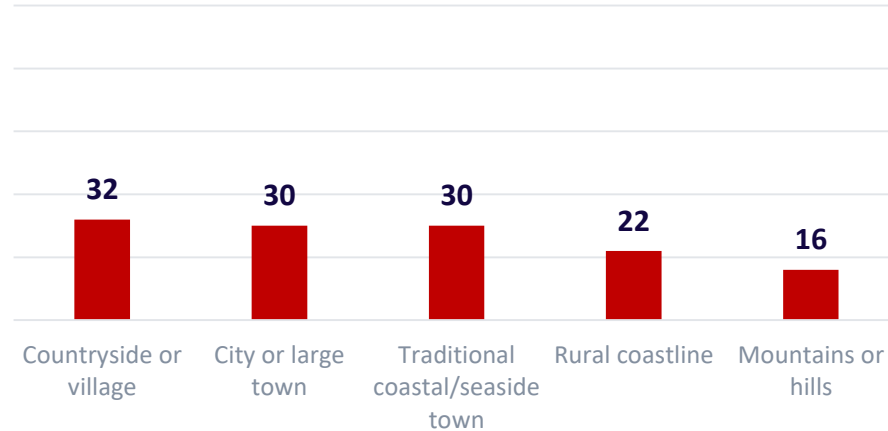


Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 2-4 merged data, UK



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

Base: All week 2-4 respondents planning on taking a holiday or short break in the UK between June and September n=1,097 and from October onwards n=1,973. Three weeks of research merged to increase statistical reliability

Type of accommodation for next U.K. short break or holiday

- There is a relatively even split in the types of accommodation people are likely to use on their trips between June and September, with ‘caravan/camping’ (35%), ‘hotel/motel/inn’ (34%), ‘private home’ (34%) and ‘commercial rental’ (32%) each generating interest from around a third.
- From October onwards, ‘hotel/motel/inn’ (46%) is significantly more likely to attract visitors than any other accommodation type. ‘Commercial rental’ (34%) and ‘private home’ (33%) are the next preferred accommodation types for trips in this period.

Figure 25. Accommodation planning on staying in on next UK overnight trip in June to September, Net percentage Weeks 2-4 merged data, UK

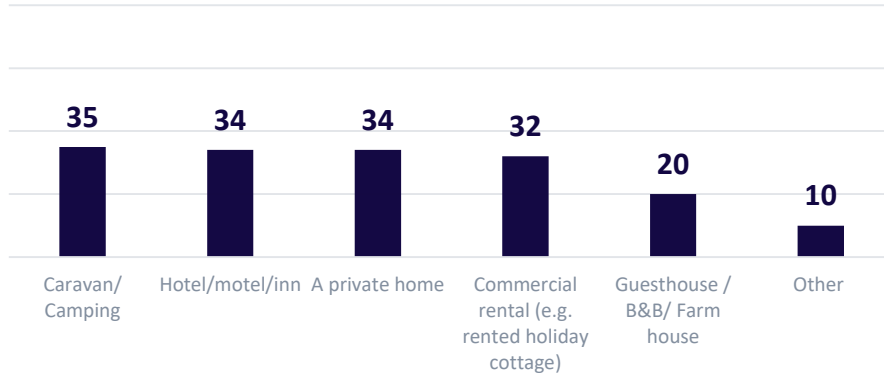
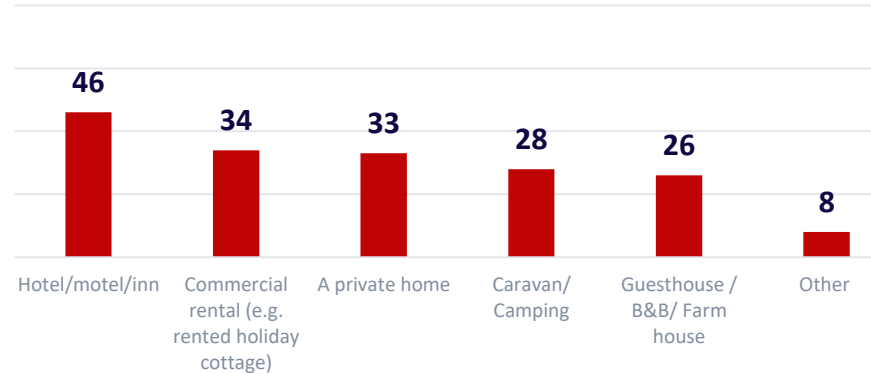


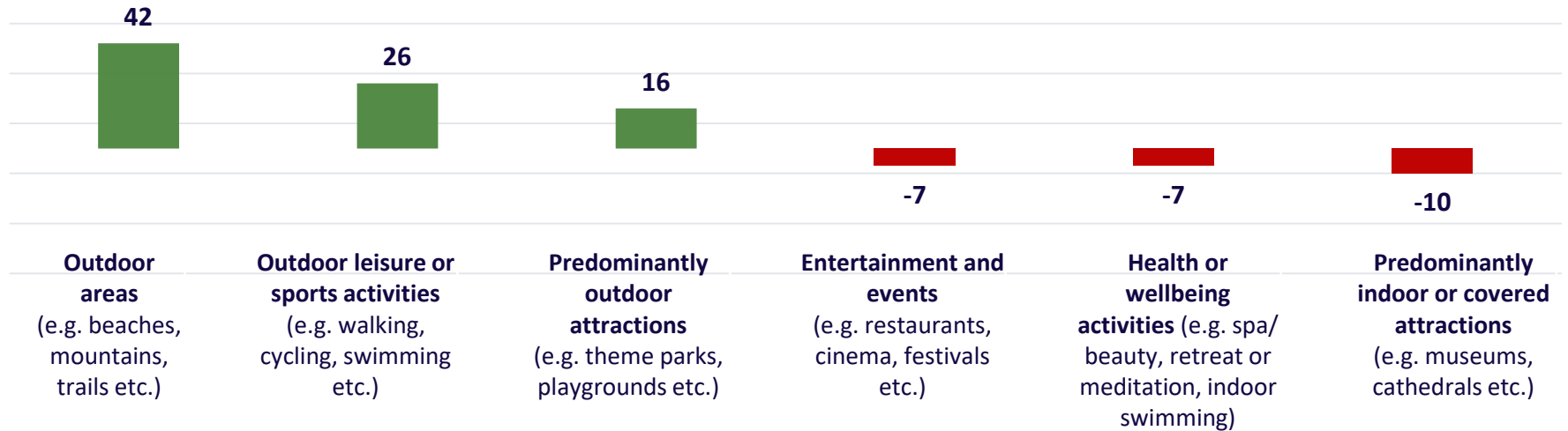
Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Weeks 2-4 merged data, UK



General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are substantially most likely to attract more visitors/engagement than normal (net +42), followed by outdoor leisure or sports activities (net +26) and outdoor attractions (net +16).
- Entertainment and events (net -7), health or wellbeing facilities (net -7) and indoor attractions (-10) are all likely to attract fewer visitors/engagement than normal once lockdown restrictions are lifted.

Figure 27. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 4, UK



Methodology

- The findings in this report are based on a weekly online survey conducted amongst a nationally representative sample of the U.K. population.
- The sample is representative of UK adults aged 16+ by gender, age, government region and social grade.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' in Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
- This report presents findings from Week 4 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 3, 2 and 1 where appropriate. Week 4 fieldwork was conducted between 8th June and 12th June 2020.

Master Data Tables

- To access the Master Data Tables, please open the 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.

