COVID-19 Consumer Weekly Tracker

Week 6

Fieldwork Period: 22 – 26 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

Fieldwork Periods

Project Period	Fieldwork Period
Week 1	18 – 22 May
Week 2	25 – 29 May
Week 3	1 – 5 June
Week 4	8 – 12 June
Week 5	15 – 19 June
Week 6	22 – 26 June
Week 7	29 June – 3 July
Week 8	6 – 10 July
Week 9	13 – 17 July
Week 10	20 – 24 July
Week 11	27 – 31 July
Week 12	3 – 7 August
Week 13	10 – 14 August

Week 6: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous week**

Key Metrics	Week 5	Week 6	Weekly Shift
National mood (average score out of 10)	6.6	6.7	+0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	30%	27%	-3
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.35	2.38	+0.03
Normality score (proportion expecting normality by September)	18%	17%	-1
The main reasons for not feeling confident about taking a trip between June-September (Top 2)	1. Fewer opportunities to eat/drink out 2. Gov't guidance on travel restrictions	1. Concerns about catching COVID-19 2. Fewer opportunities to eat/drink out	New no. 1

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

Key Metrics	Week 5	Week 6	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-26	-23	+3
Anticipated number of U.K. holidays compared to normal (% net)	-29	-26	+3
UK near-term holiday/short break confidence (June/July/August/Sept confident)	5%/11%/25%/40%	7%/14%/29%/43%	+2/+3/+4/+3
UK medium-term holiday/short break confidence (Oct-Dec confident)	54%	54%	0
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	72%	71%	-1
Proportion going on a UK short break *or* holiday between June-Sept	20%	24%	+4*
Split between holiday / short break / don't know for next trip between June-Sept	43%/53%/4%	41%/52%/6%	-2/-1/+2

Week 6: Scorecard of Key Metrics (2)

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

*** Represents a significant change on previous week**

Key Metrics	Week 5	Week 6	Weekly Shift
Leading England destination likely to stay in between June - Sept	South West	South West	No change
Main *type* 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

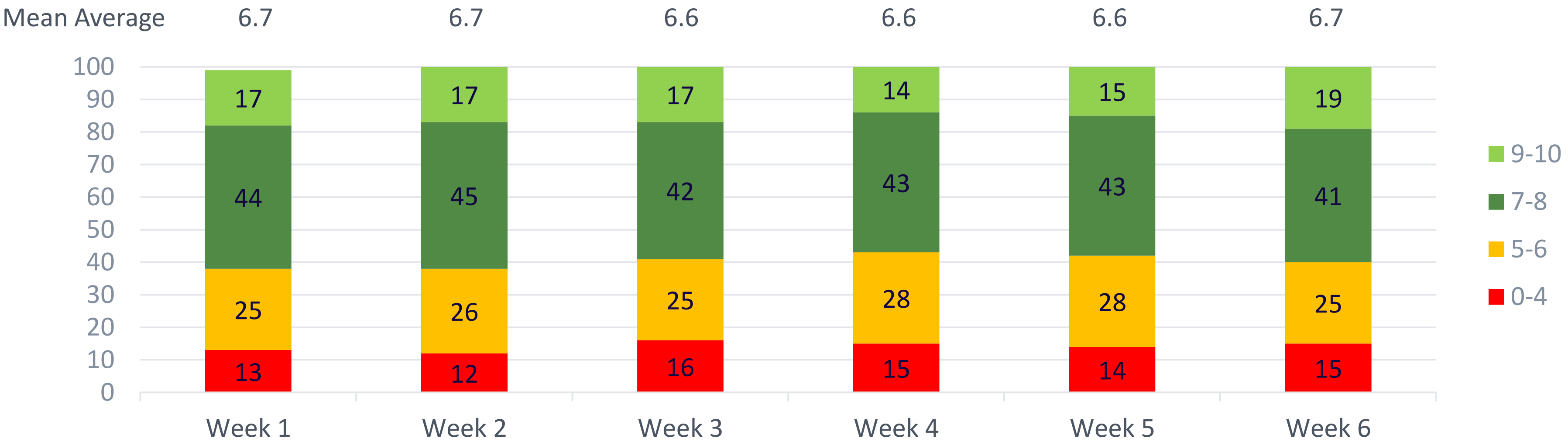
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 5	Week 6	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 6.7 out of 10, back to the same level as weeks 1 and 2, and higher than weeks 3 to 5.
- 19% described their mood as 9-10/10, significantly higher than week 5 and the highest proportion seen so far.

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

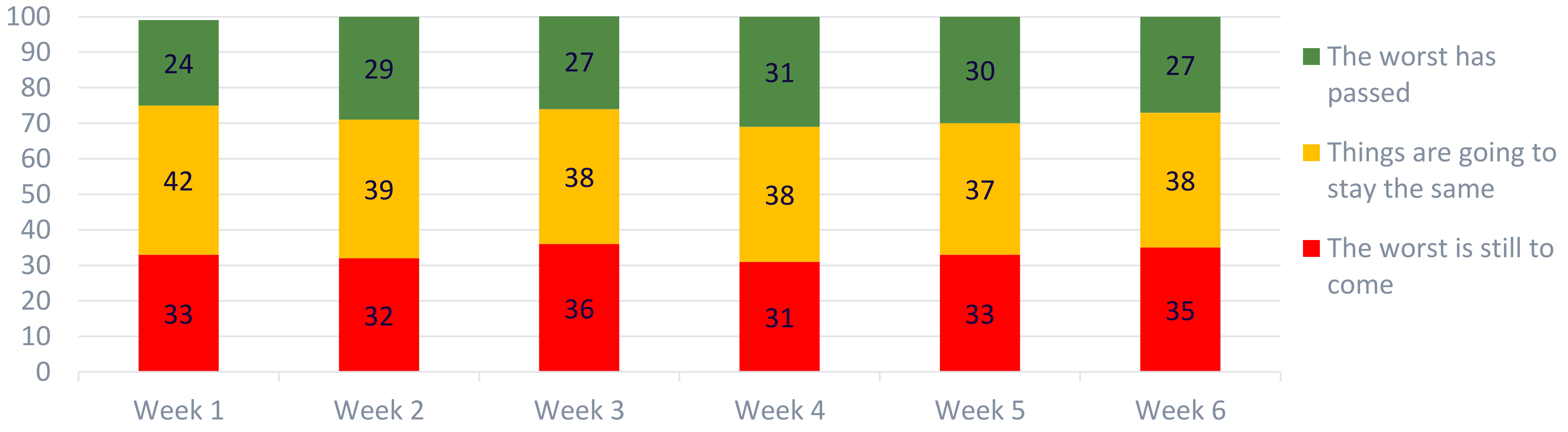


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756

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

- Dropping down to the same level as week 3, 27% of the U.K. population feel that ‘the worst has passed’ in relation to COVID-19.
- 35% think that the worst is still to come, which represents the second highest proportion recorded in this survey.

Figure 2. Perception of the situation with regards to COVID-19, Percentage week-on-week, 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. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756

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

- 17% of U.K. residents believe that life will return to 'something close to normal' by September, representing the sixth consecutive fall. 39% think that something close to normality will return by December, also steadily decreasing.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 6, UK

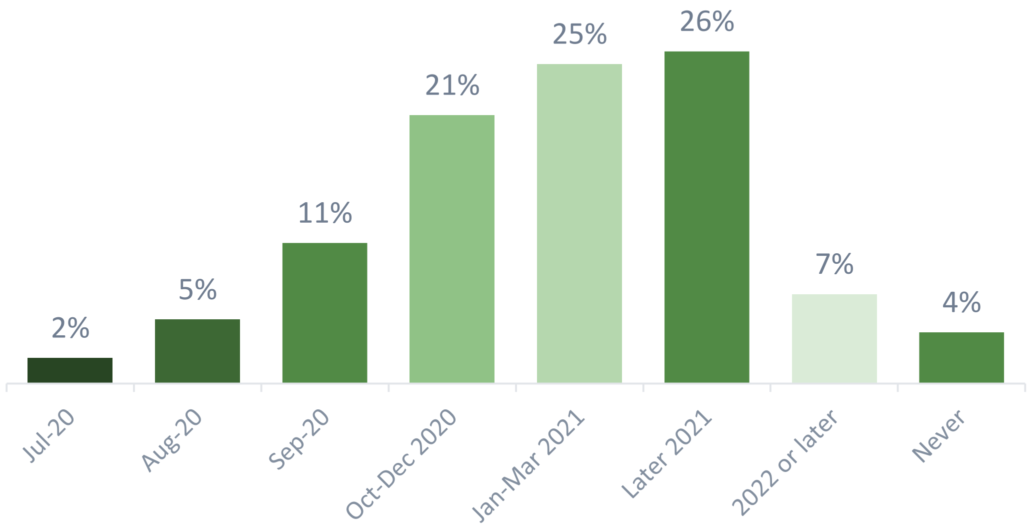


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

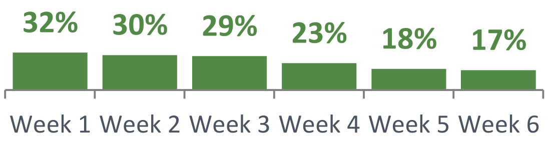
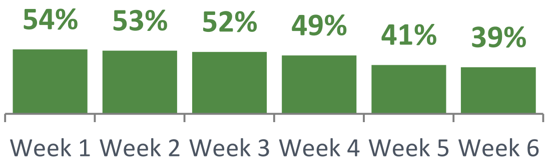


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

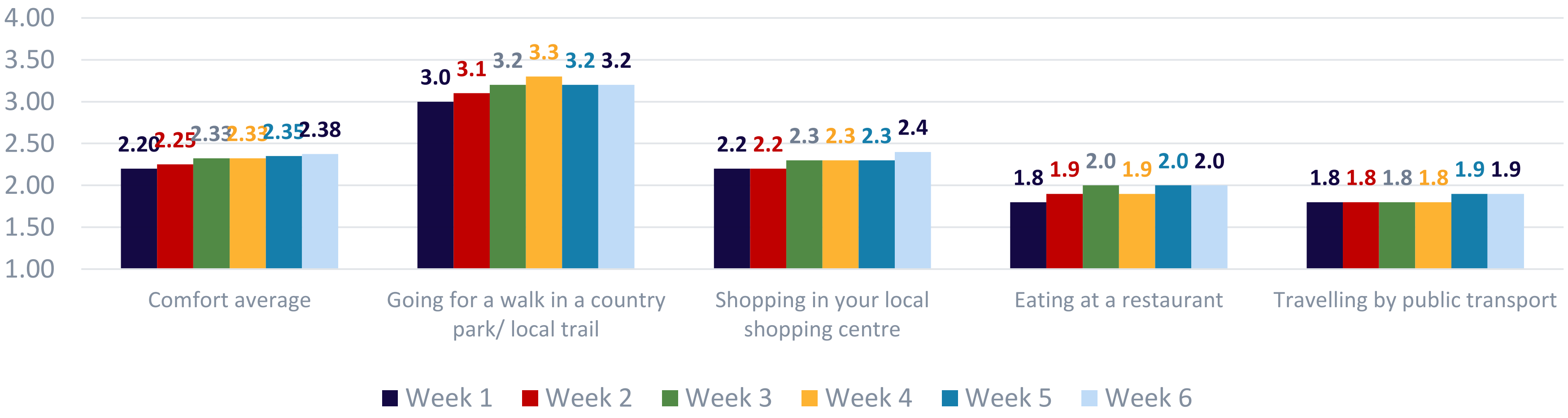


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756

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

- The 'appetite for risk' score stands at 2.38 out of 4 (4 representing 'very comfortable'), marginally higher than in week 5.
- As in previous weeks, people feel most comfortable with 'going for a walk in a country park/local trail' (3.2) followed by 'shopping in your local shopping centre' (2.4), which reaches its highest comfort level yet.

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

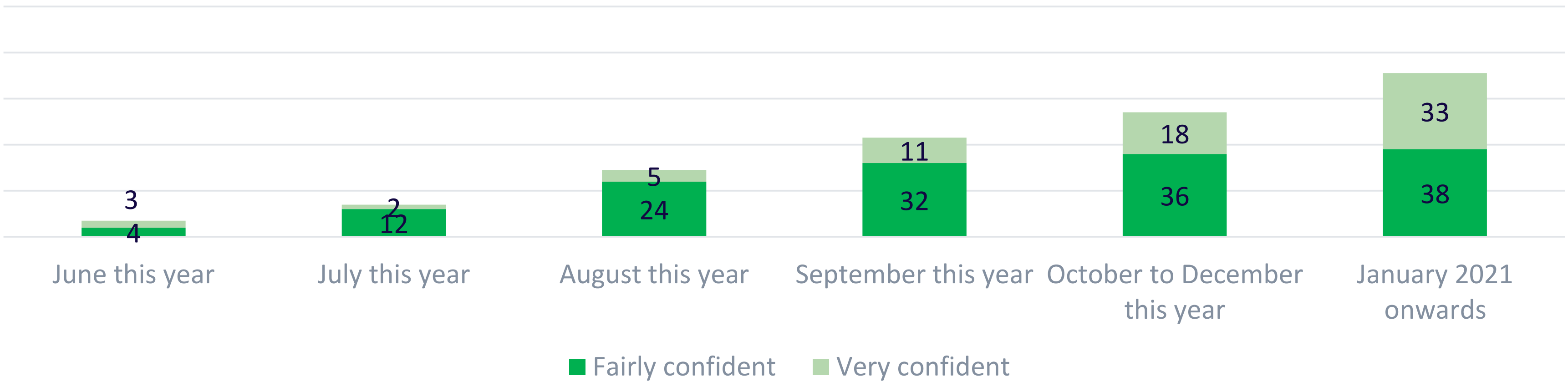


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances Mean average based on those that gave a score of 1-4. 'Net: comfort average' 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; Week 5 n=1,739; Week 6 n=1,756

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

- While confidence does appear to be slowly improving, it's still just a minority who claim they would be able to take a U.K. short break or holiday in July (14%), August (29%) or September (43%).
- The majority are confident they'd be able to take a U.K. trip between October and December this year (54%) and from January 2021 onwards it rises to 71%.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 6, 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: All Week 6 respondents n=1,756

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

- ‘Concerns about catching COVID-19’ has become the leading reason for the U.K. public not feeling confident about travelling between June and September this year (almost half, at 47% citing this), followed by ‘fewer opportunities to eat/drink out’ (44%) and ‘fewer things to do/places to visit’ (42%).
- For trips from October onwards, concerns about catching COVID-19 is the leading reason again, but by a considerably greater margin (54% versus 36% for the second ranked reason).

Figure 8. Top 5 reasons for not being confident about travelling between June to September, Percentage Week 6, UK

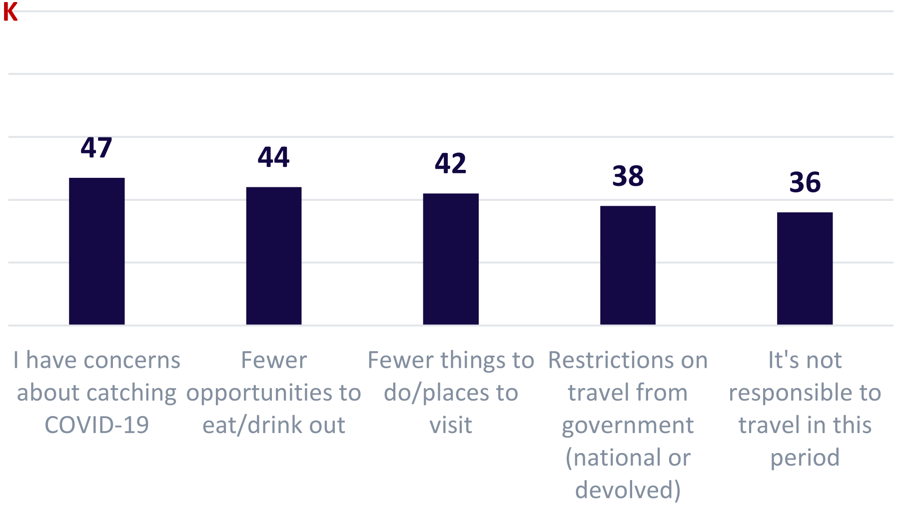
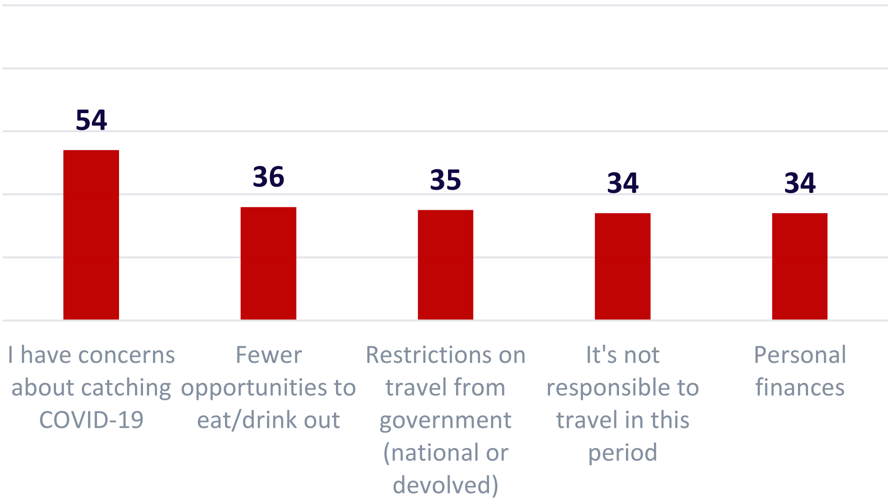


Figure 9. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 6, UK



QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Week 6 respondents not confident about taking a break between June and September n=1,171 and from October onwards n=585.

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

- Compared to normal, the public anticipates taking fewer short breaks (net -23) and holidays of 4+ nights (net -26) in the UK between now and the end of 2020. The net anticipation for both types of trip are marginally higher than in week 5.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 6, UK

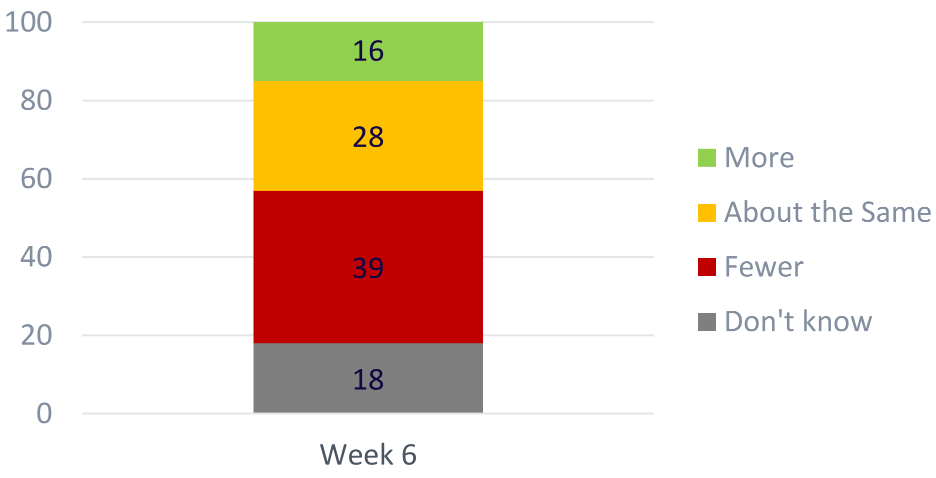
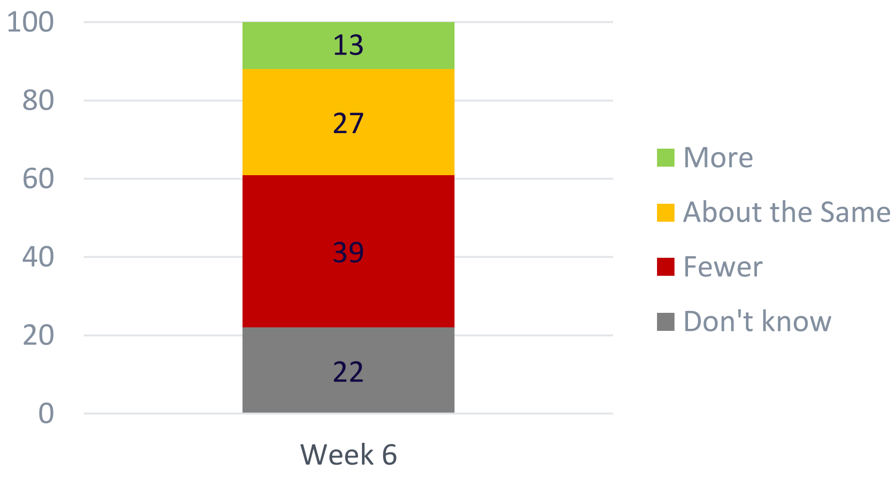


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 6, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of the year? Base: All Week 6 respondents n=1,756

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults anticipate taking fewer overseas short breaks (-42) and holidays (-40) by the end of the year compared to normal. Unlike U.K. trips, these net figures have marginally deteriorated since week 5, when they were -38 and -37 respectively.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 6, UK

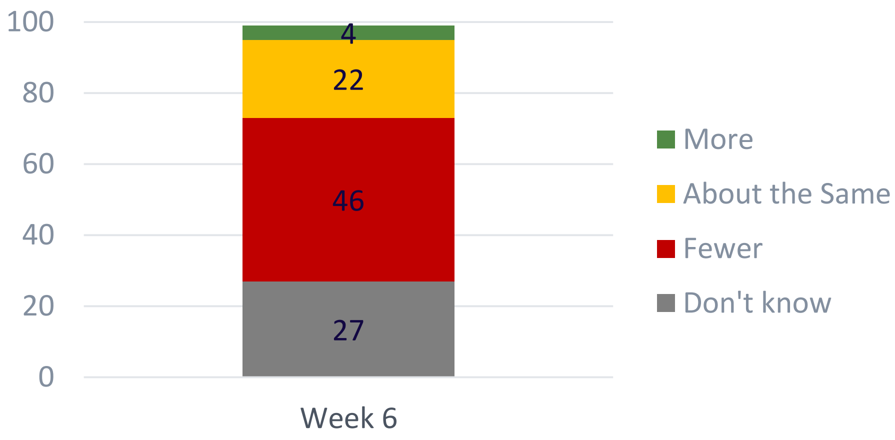
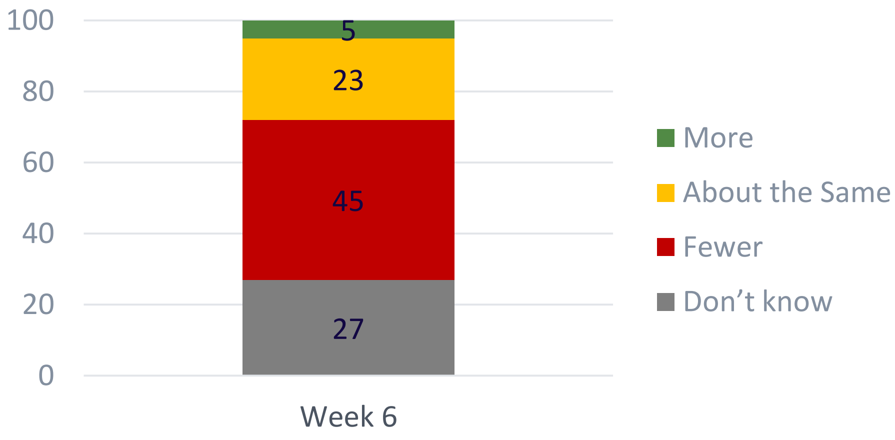


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 6, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All Week 6 respondents n=1,756

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

- 41% 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. Both figures are marginally up from week 5.

Figure 14. When anticipate PLANNING next UK holiday or short break, Percentage Week 6, UK

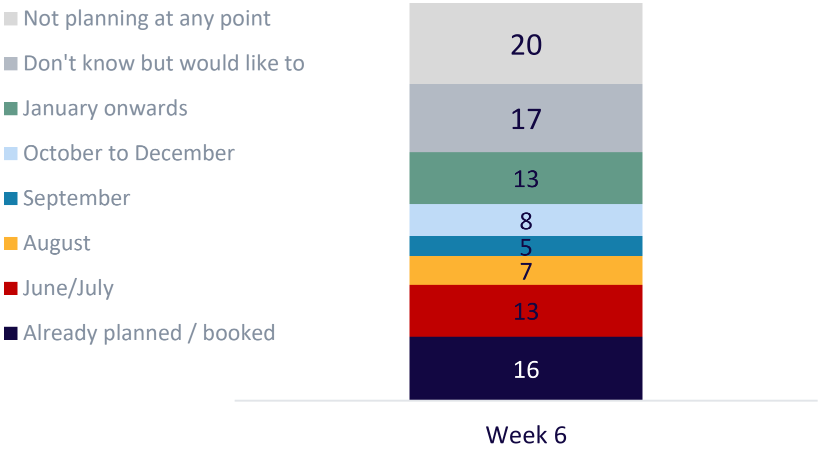
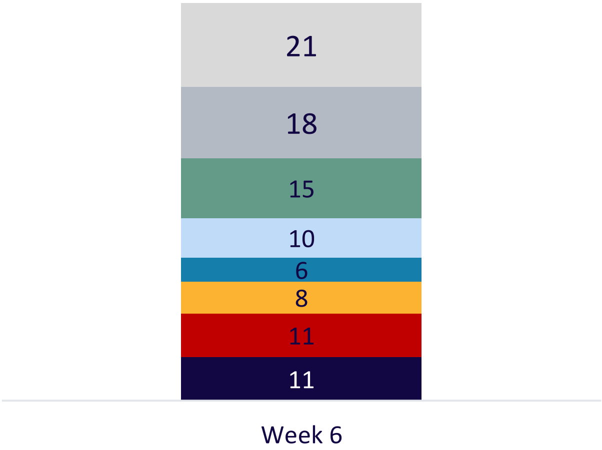


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 6, UK



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Week 6 respondents n=1,756

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

- 24% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, significantly higher than the proportion intending to do so in week 5, and the highest total seen so far.
- 40% plan on taking their next UK trip in October or later, whilst 18% would like to take a trip but are unsure when they will do so.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 6, UK

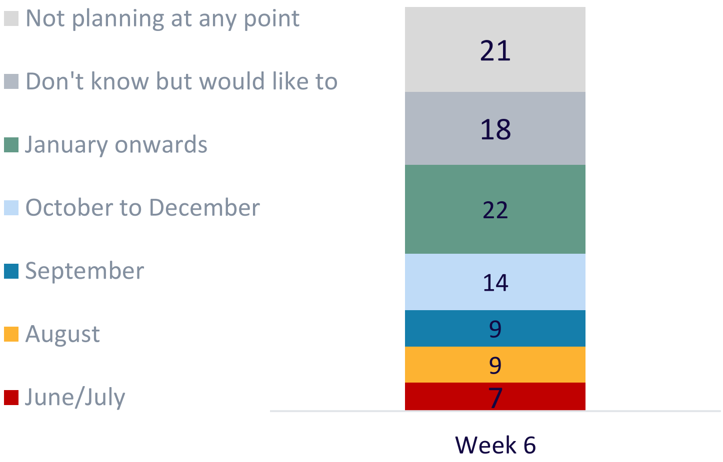
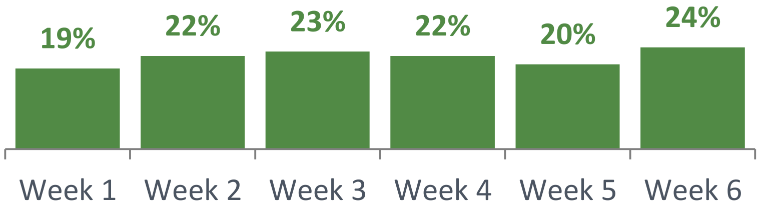


Figure 17. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK

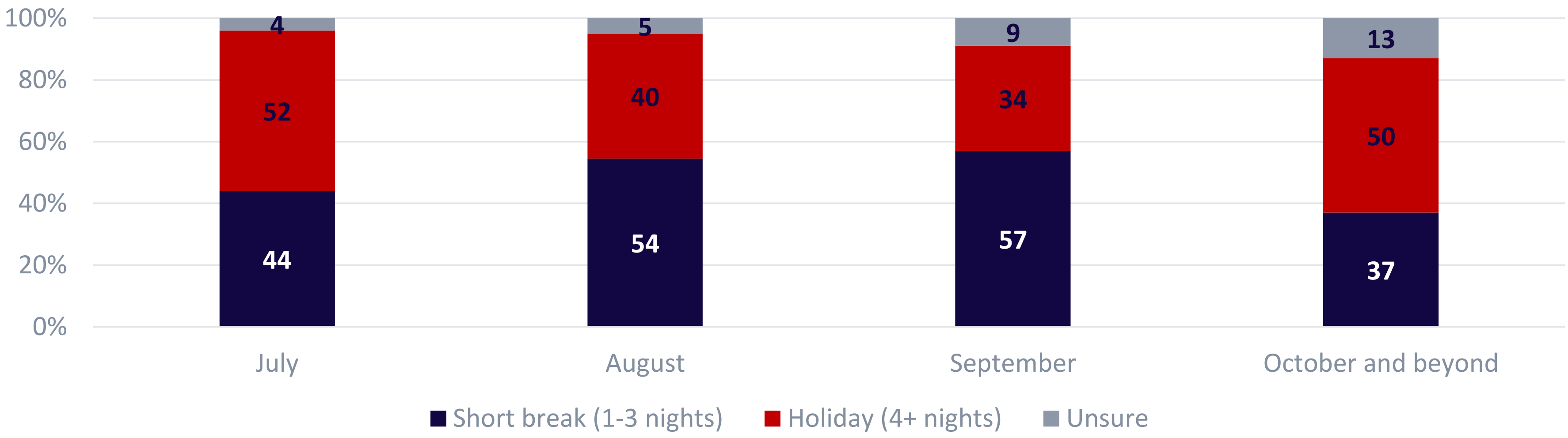


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757 Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756

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 significantly so from October onwards. In August and September, trips are significantly more likely to be short-breaks than holidays.

Figure 18. Length of next UK holiday or short break by time period, Percentage Week 6, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 6 respondents intending to take next holiday in each time period July n=109, August n=155, September n=142, October and beyond n=638

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

- The South West remains the most likely destination by a significant margin between June and September this year (20% intending to visit). This is followed by Scotland (13%) and then 5 regions that generate interest from between 9% and 11% of those planning a domestic trip in this period.
- The South West, Scotland, the North West and London are the parts of the UK most likely to be visited from October onwards.

Figure 19. Where planning on staying on next UK overnight trip in June to September, Percentage Week 4-6 merged data, Top 10, UK

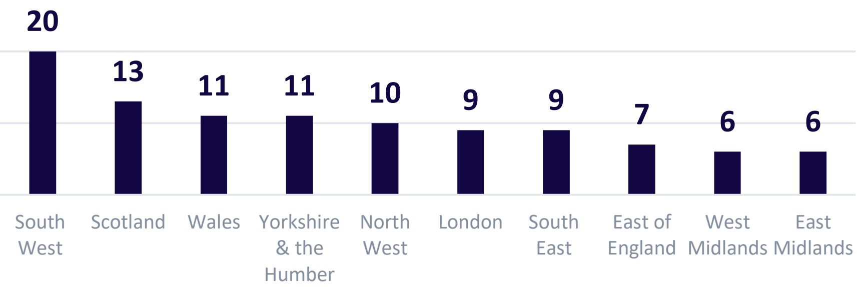
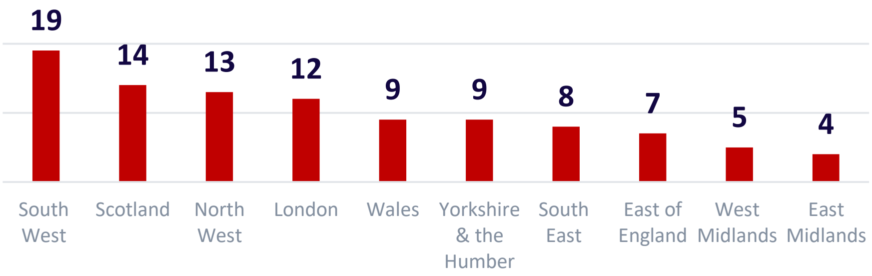


Figure 20. Where planning on staying on next UK overnight trip <u>from October onwards</u>, Percentage Week 4-6 merged data, Top 10, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 4-6 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=1,926. 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 but decreasing in both: 61% of trips between June and September (64% in week 5), and 55% from October onwards (58% in week 5). Train is the second most preferred mode across both periods, followed by plane.

Figure 21. Top 5 main modes of travel of destination for trip in June to September, Percentage Week 6, UK

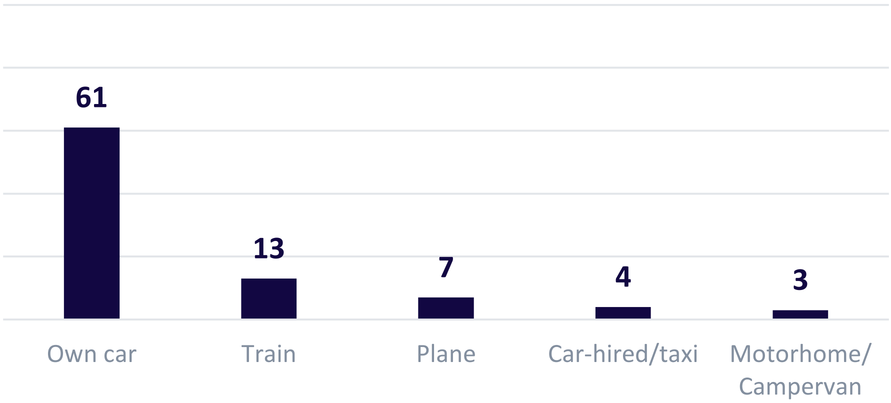
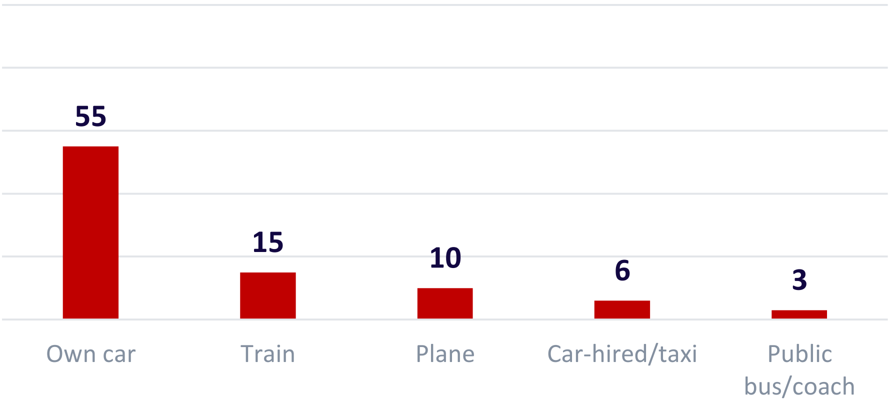


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 6, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 6 respondents planning on taking a holiday or short break in the UK between June and September n=406 and from October onwards n=638

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

- 'Countryside or village' (34%) and 'traditional coastal/seaside town' (33%) are the two main destination types for a trip between June and September. 'City or large town' (23%) and 'rural coastline' (21%) are the next most preferred destination types but significantly less preferred.
- From October onwards, 'countryside or village' (32%), 'traditional coastal/seaside town' (30%) and 'city or large town' (30%) are the three leading destination types. 'City or large town' is significantly more likely to be selected from October onwards than from June to September.

Figure 23. Main type of destination for trip in June to September, Percentage Weeks 4-6 merged data, UK

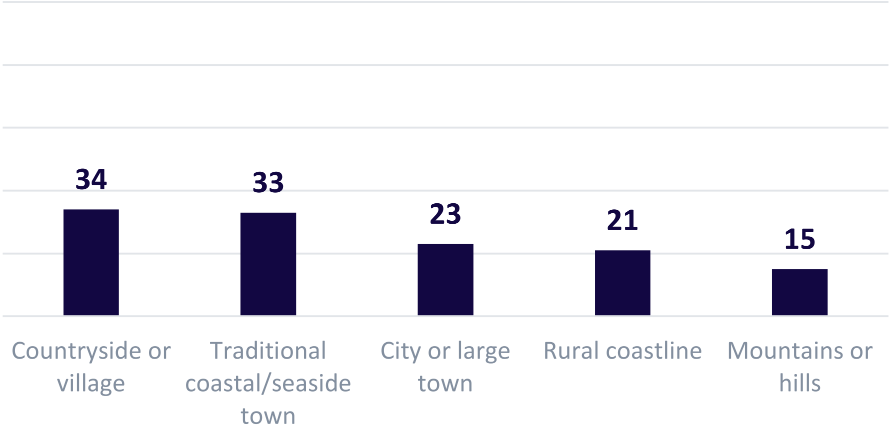
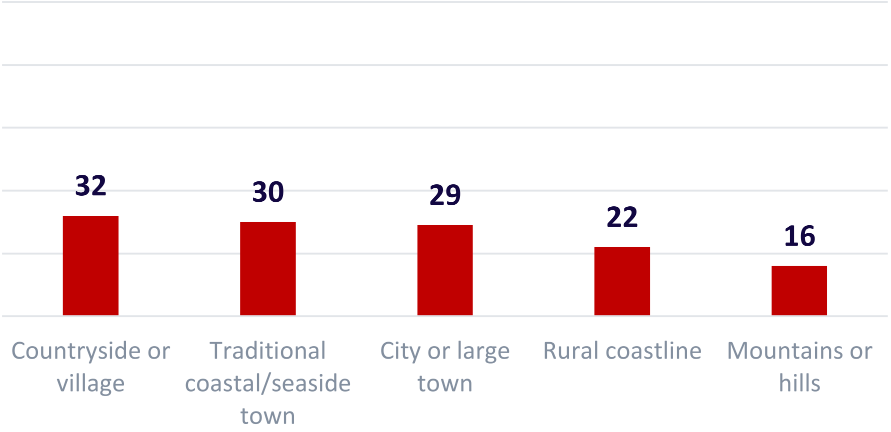


Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 4-6 merged data, UK



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 4-6 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=1,926.
Three weeks of research merged to increase statistical reliability

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

- There remains a relatively even split in the top four types of accommodation people are likely to use on their trips between June and September – ‘caravan/camping’ (35%), private home’ (35%), ‘hotel/motel/inn’ (34%), ‘and ‘commercial rental’ (33%) only separated by two percentage points.
- From October onwards, ‘hotel/motel/inn’ (41%) is more likely to attract visitors than any other accommodation type. ‘Commercial rental’ (37%) and ‘private home’ (35%) follow in second and third place for trips in this period.

Figure 25. Accommodation planning on staying in on next UK overnight trip in June to September, Net percentage Weeks 4-6 merged data, UK

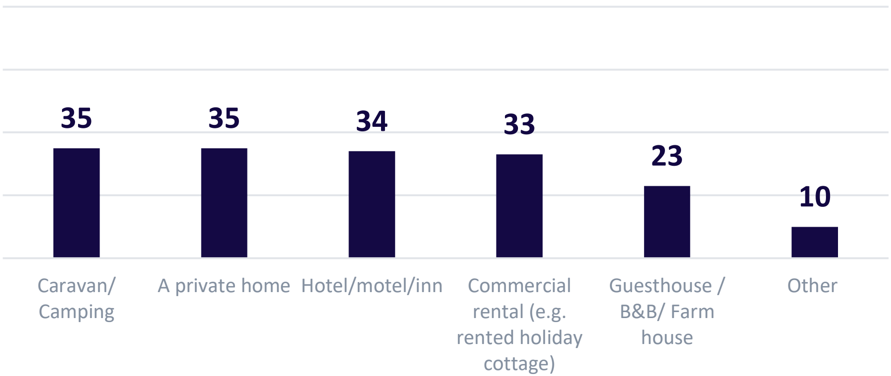
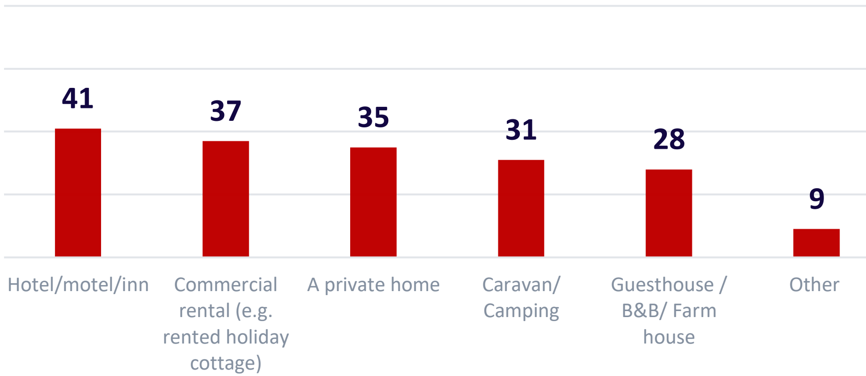


Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Weeks 4-6 merged data, UK

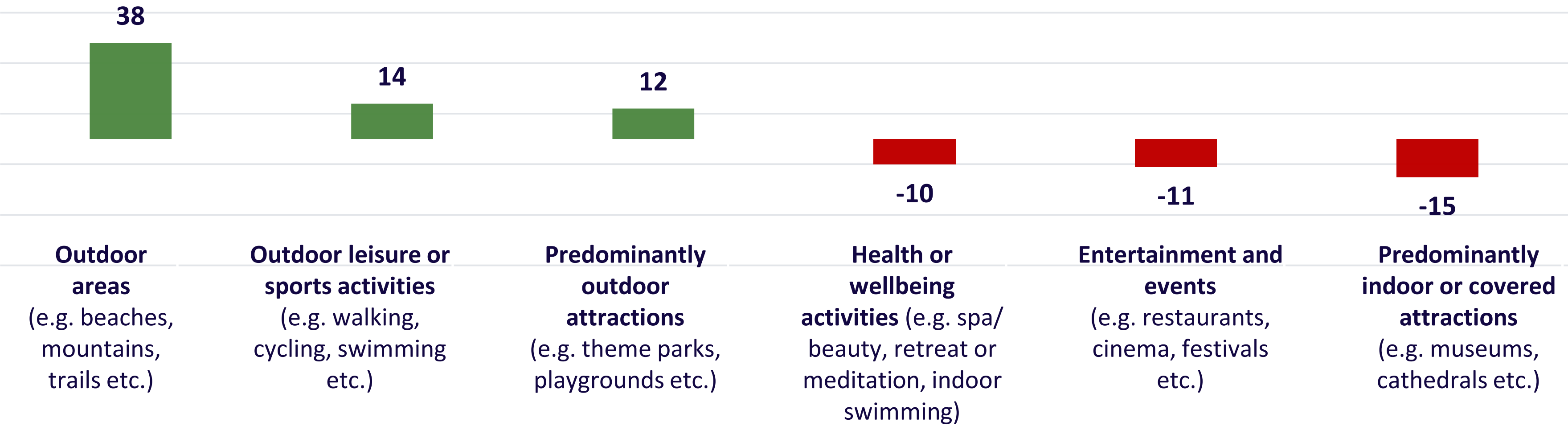


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 4-6 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=1,936. Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +38), followed by outdoor leisure or sports activities (net +14) and outdoor attractions (net +12) although all of these are down on week 5.
- Health or wellbeing facilities (net -10), entertainment and events (net -11), and indoor attractions (-15) are likely to attract fewer visitors/engagement than normal even when fully open to customers.

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 6, UK

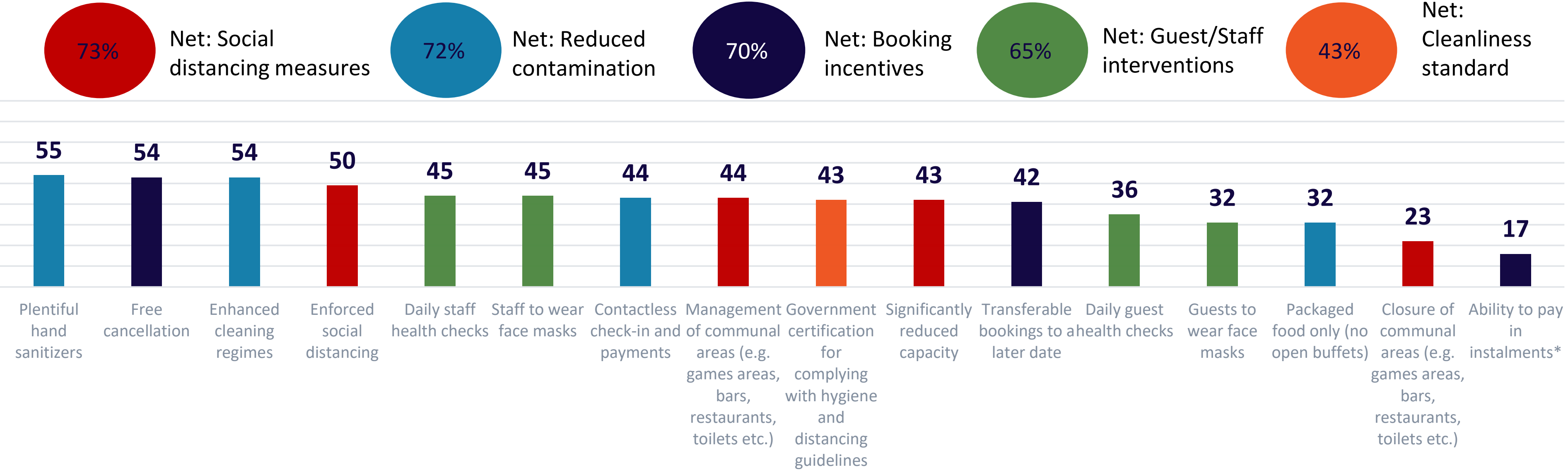


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All respondents Week 6 n=1,756

Conditions essential for people to stay in accommodation this summer

- Steps to ensure social distancing (73%), reduce cross-contamination (72%) and booking incentives (70%) are the biggest reassurances the public need when planning a stay in paid-for accommodation. ‘Guest/staff interventions’ (65%) and government cleanliness standards (43%) are important but elicit lower levels of endorsement.

Figure 28. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 6, UK



Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them this summer? Base: All respondents Week 6 n=1,756. *NEW IN WEEK 6

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 6 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 5, 4, 3, 2 and 1 where appropriate. Week 6 fieldwork was conducted between 22nd June to 26th 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.