COVID-19 Consumer Weekly Tracker

Week 9

Fieldwork Period: 13 July – 17 July

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

VisitBritain BVA BDRC

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 9: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 8	Week 9	Weekly Shift
National mood (average score out of 10)	6.7	6.7	0
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	18%	20%	+2
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.48	2.50	+0.2
Normality score (proportion expecting normality by September)	11%	9%	-2
The main reasons for not feeling confident about taking a trip between July-September (Top 2)	1. Concerns about catching COVID-19 2. Fewer opportunities to eat/drink out	1. Concerns about catching COVID-19 2. Fewer opportunities to eat/drink out	No change

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

Key Metrics	Week 8	Week 9	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-18	-20	-2
Anticipated number of U.K. holidays compared to normal (% net)	-23	-27	-4*
UK near-term holiday/short break confidence (July/August/Sept. confident)	24%/34%/44%	26%/33%/43%	+2/-1/-1
UK medium-term holiday/short break confidence (Oct-Dec confident)	53%	50%	-3
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	71%	67%	-4*
Proportion going on a UK short break *or* holiday between July-Sept	26%	24%	-2
Split between holiday / short break / don't know for next trip between July-Sept	42%/56%/3%	45%/52%/2%	+3/-4/-1

Week 9: 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 8	Week 9	Weekly Shift
Leading England destination likely to stay in between July – Sept	South West	South West	No change
Main *type* of destination likely to stay in between July – Sept	Traditional coastal/seaside town	Countryside or village	Change in no.1
Main accommodation type likely to stay in between July - Sept	Caravan/camping	Caravan/camping	No change

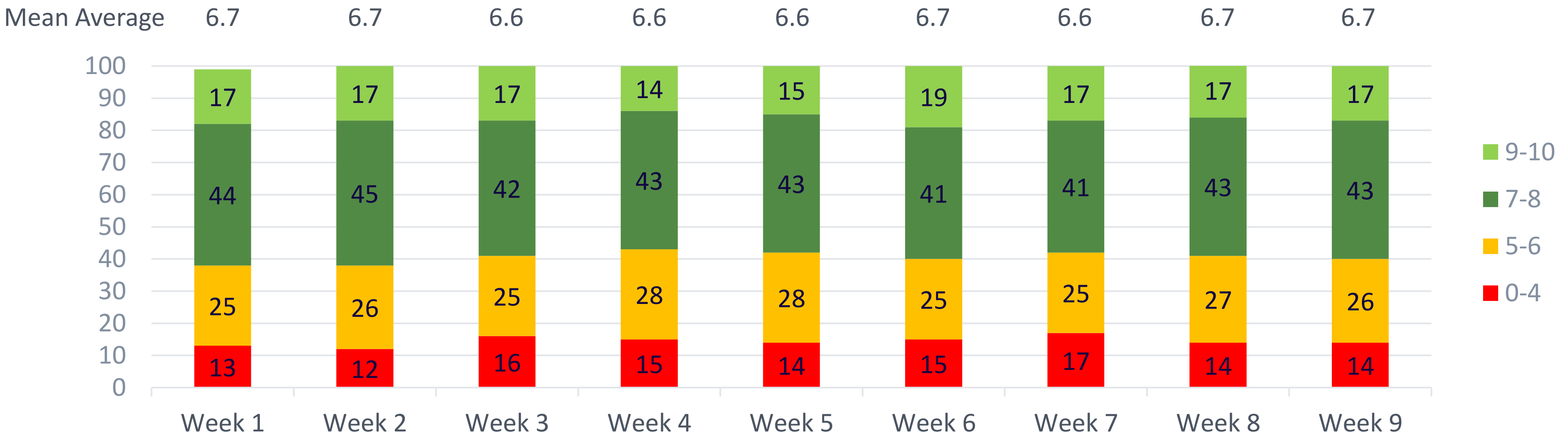
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 8	Week 9	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 adults remains 6.7 out of 10, largely consistent with the historical trend.

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

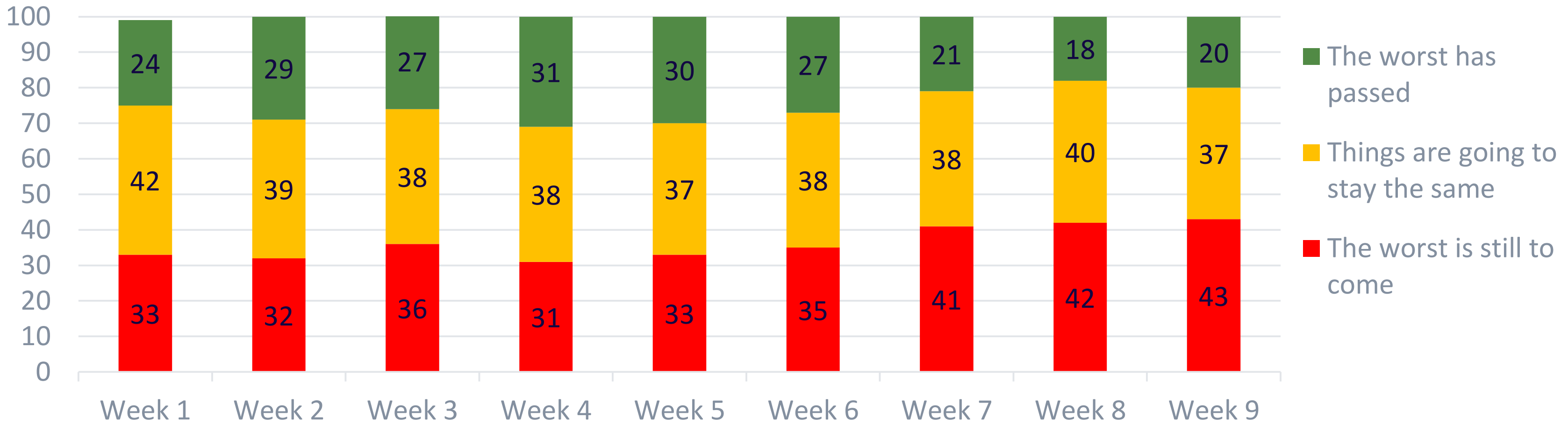


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759

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

- Some 1 in 5 of the U.K. population feel ‘the worst has passed’ in relation to COVID-19 situation.
- However, 43% currently believe ‘the worst is still to come’, which is the highest proportion seen thus far in the study.

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; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759

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

- Fewer than 1 in 10 U.K. adults believe life will return to 'something close to normal' by September and just under a quarter believe so by December, sentiment on both declining slightly compared to last week.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 9, UK

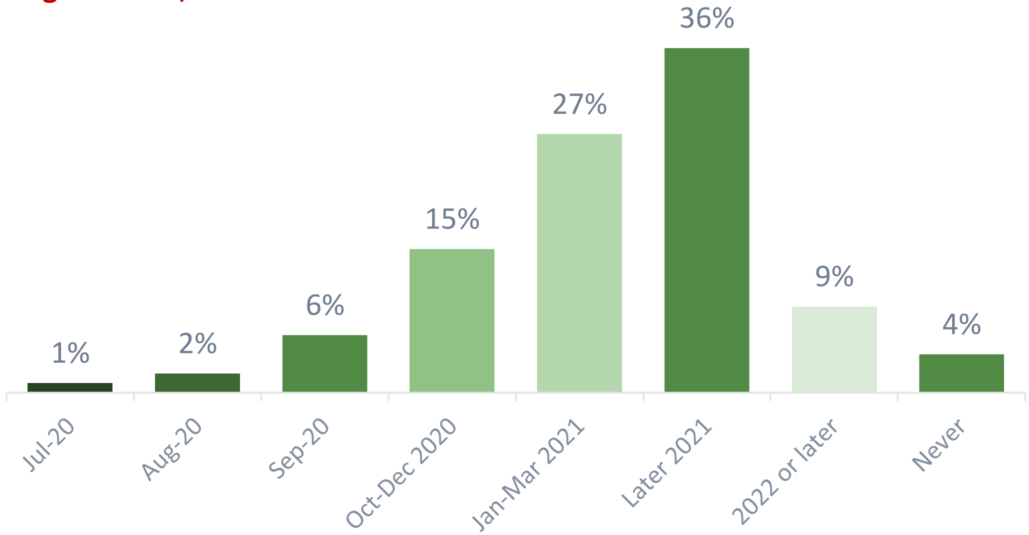


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

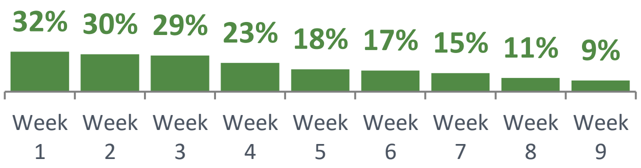
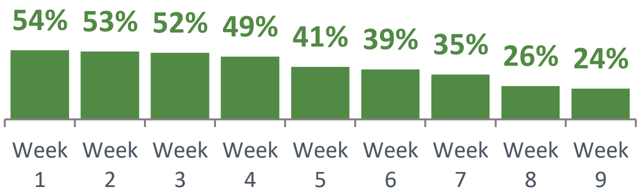


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

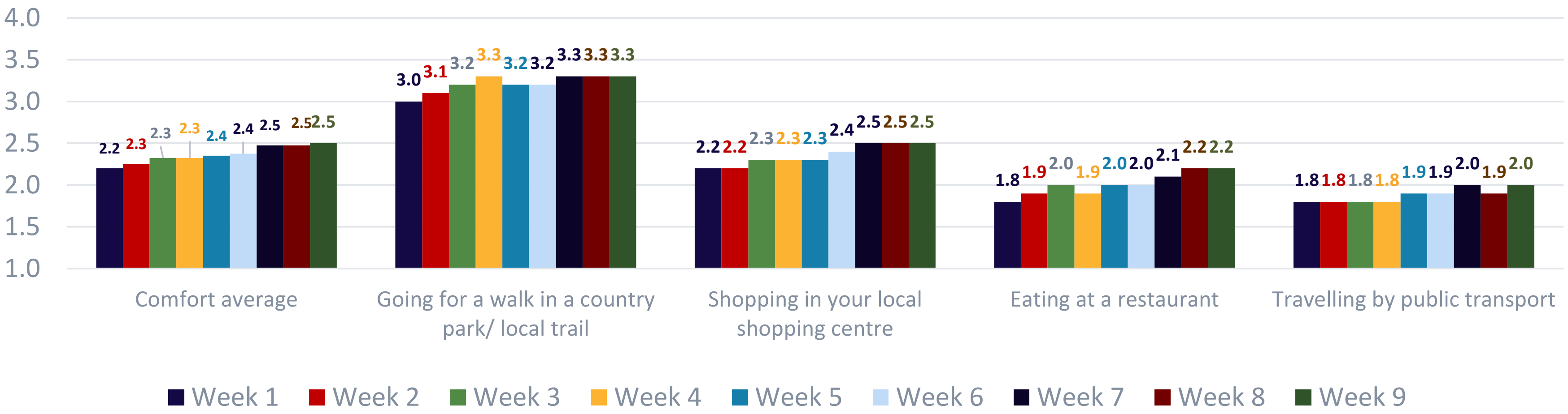


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759

Appetite for Risk

- The 'appetite for risk' score remains level at 2.5 out of 4 (4 representing 'very comfortable').
- Most of the constituent activities are also unchanged, although 'travelling by public transport' exhibits a slight net increase in comfort, rising from 1.9 to 2.0 and back to the level achieved in week 7.

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; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759

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

- The proportion of U.K. adults confident they would be able to take a domestic short break or holiday in July rises to 26% (versus 24% last week). Confidence for taking a trip in August is marginally down to 33%.
- Confidence in taking trips later in the year (between October and December) also shows a small decline, to 50%.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 9, UK

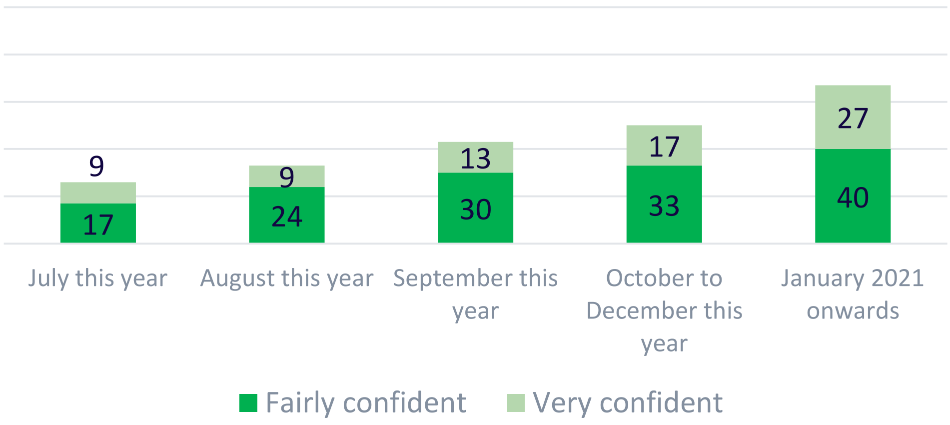


Figure 8. Confidence in taking a UK short break or holiday in August, Percentage very/fairly confident, week-on-week, UK

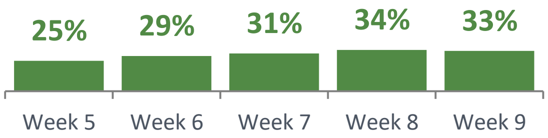
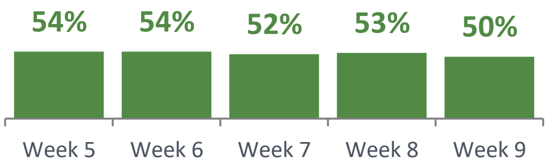


Figure 9. Confidence in taking a UK short break or holiday in Oct - Dec, Percentage very/fairly confident, week-on-week, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the five 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 9 respondents n=1,759

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

- ‘Concerns about catching COVID-19’ remains the leading reason for not feeling confident about travelling in the U.K. between July and September this year (49% of the ‘not confident’ population stating this). Having ‘fewer opportunities to eat/drink out’ and ‘fewer things to do/places to visit (both 39%) are also key concerns.
- From October onwards, ‘concerns about catching COVID-19’ is also pre-eminent, with all other reasons significantly less likely to receive mentions.

Figure 10. Top 5 reasons for not being confident about travelling between July to September, Percentage Week 9, UK

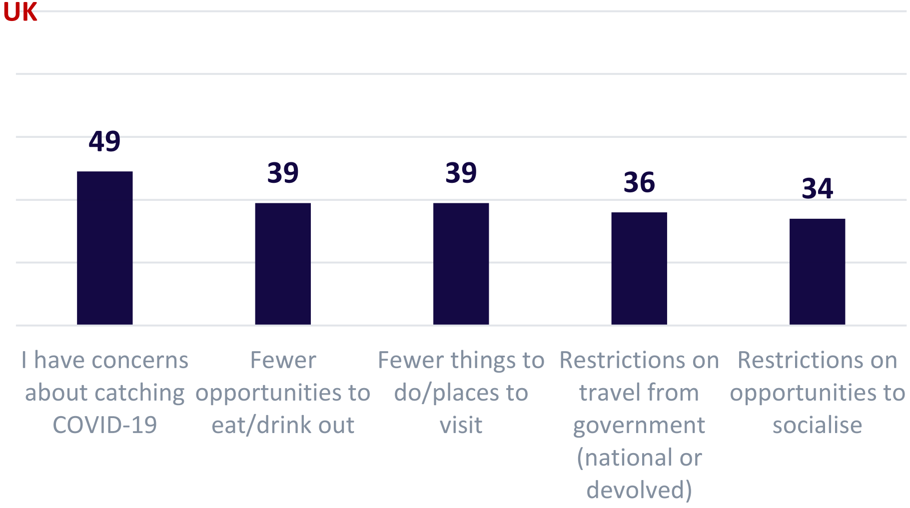
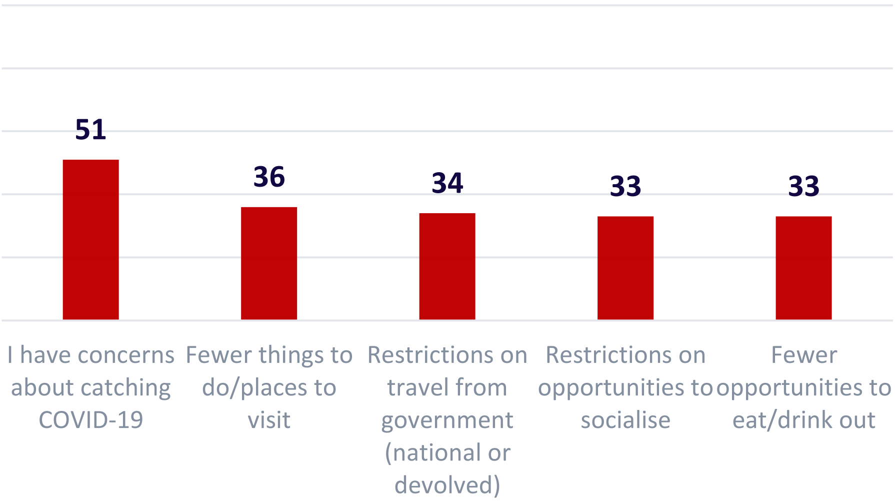


Figure 11. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 9, UK



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 9 respondents not confident about taking a break between July and September n=883 and from October onwards n=588.

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

- Compared to normal, adults from the UK are anticipating taking fewer domestic short breaks (net -20) and holidays of 4+ nights (net -27) between now and the end of 2020.

Figure 12. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 9, UK

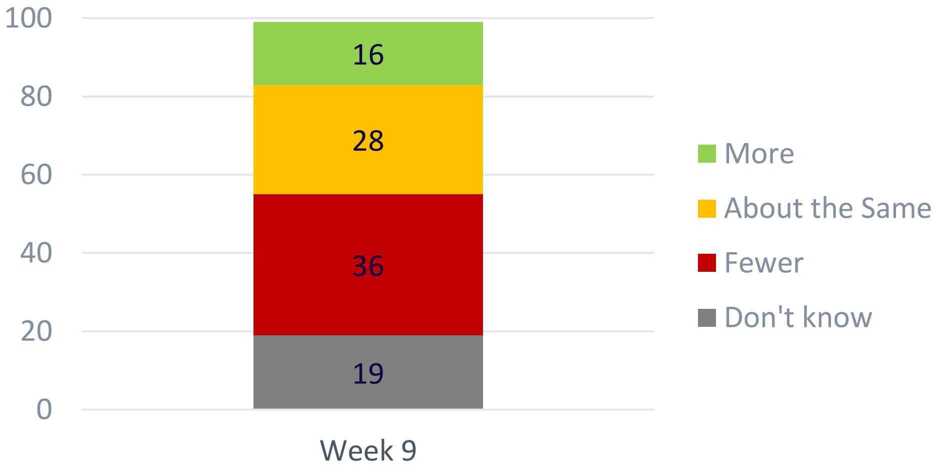
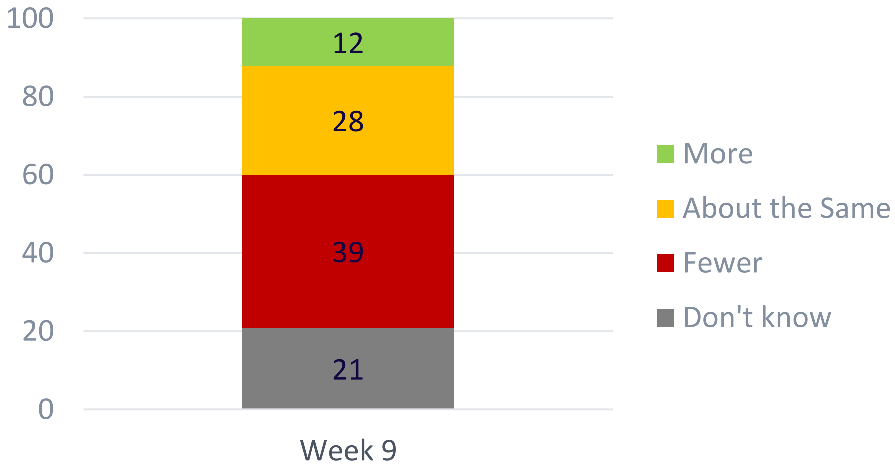


Figure 13. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 9, UK



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 9 respondents n=1,759

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults also anticipate taking fewer overseas short breaks (net score -42) and holidays (-40) by the end of the year compared to normal. These net scores are largely stable week-on-week.

Figure 14. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 9, UK

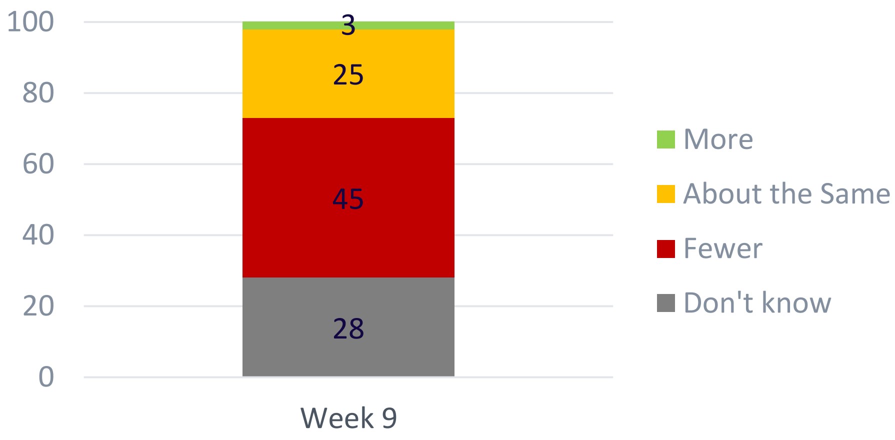
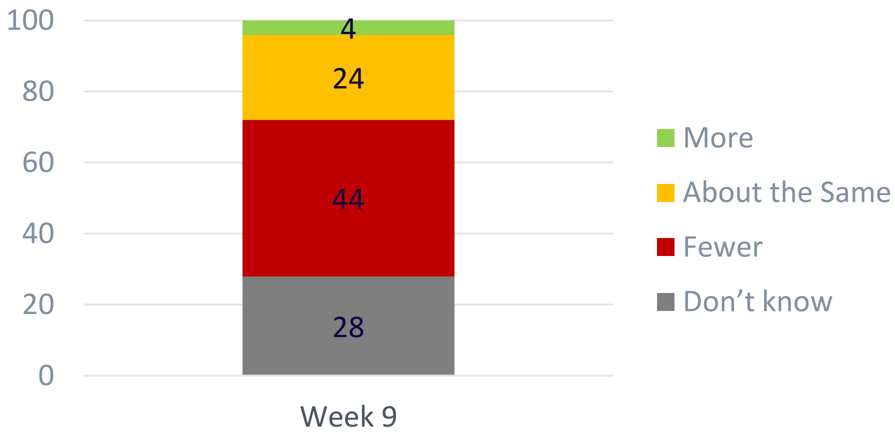


Figure 15. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 9, UK

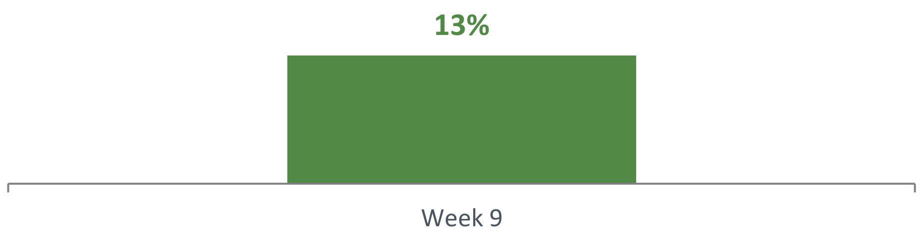


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All Week 9 respondents n=1,759

How many have already been on a U.K. short break or holiday

- 13% of U.K. adults say they *have been* on a U.K. short break or holiday at some point so far during July
- 46% of these said the main reason was to have a holiday, 40% were visiting friends and relatives, 9% on business and 5% for another reason.

Figure 16. Proportion that have been on a trip in July, Percentage, Week 9, UK



QVB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK during July?
Base: All respondents. Week 9 n=1,759

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

- 19% have already planned and 15% have already booked their next U.K. short break or holiday, a slight increase on last week.
- 40% have either already planned *or* intend to plan a U.K. short break or holiday by September while 35% have already booked *or* intend to book their next domestic trip by this time.

Figure 17. When anticipate PLANNING next UK holiday or short break, Percentage Week 9, UK

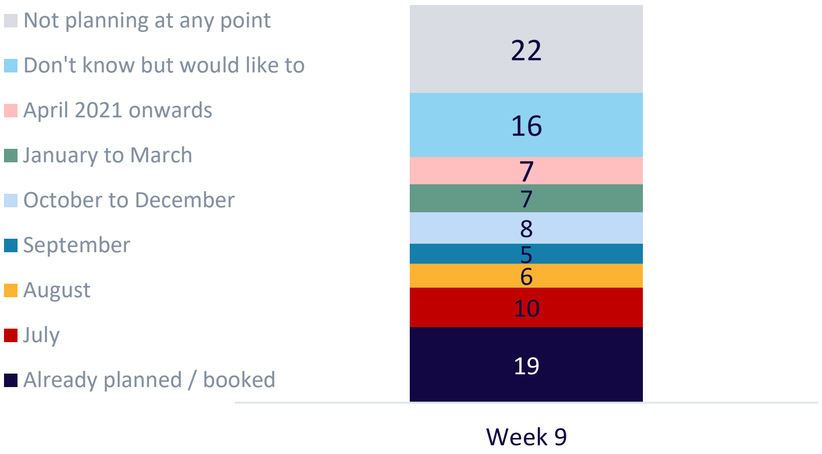
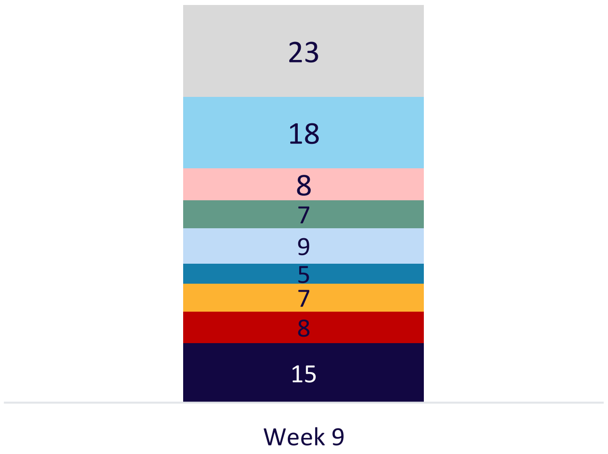


Figure 18. When anticipate BOOKING next UK holiday or short break, Percentage Week 9, UK



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 9 respondents n=1,759

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

- 24% of U.K. adults anticipate actually *going* on their next U.K. short break or holiday by this September, however, adding in those who have already been on a trip during July, this figure rises to 33%.
- 19% plan on taking their next UK trip between October and March, whilst 18% would like to take a trip but are unsure when they will do so.

Figure 19. When anticipate GOING on next UK trip, Percentage Week 9, UK

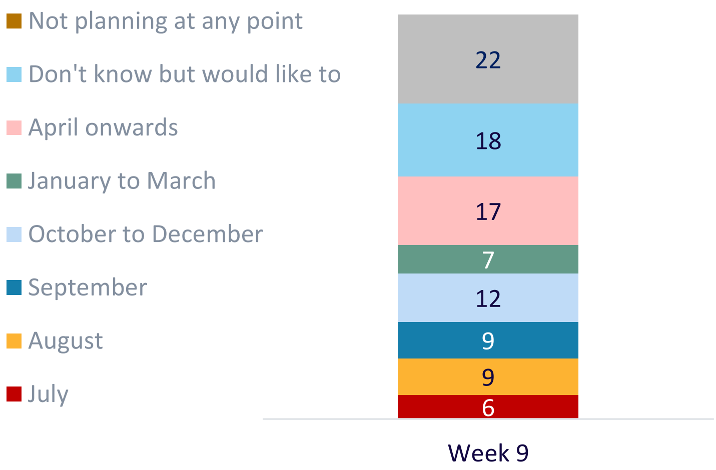
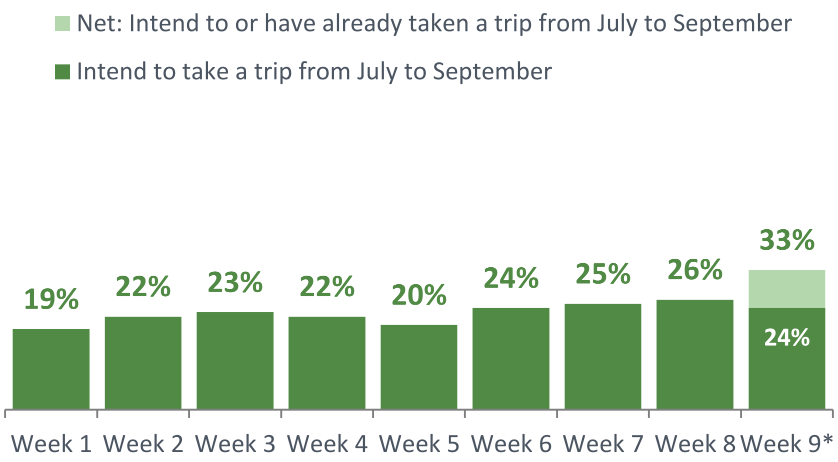


Figure 20. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK

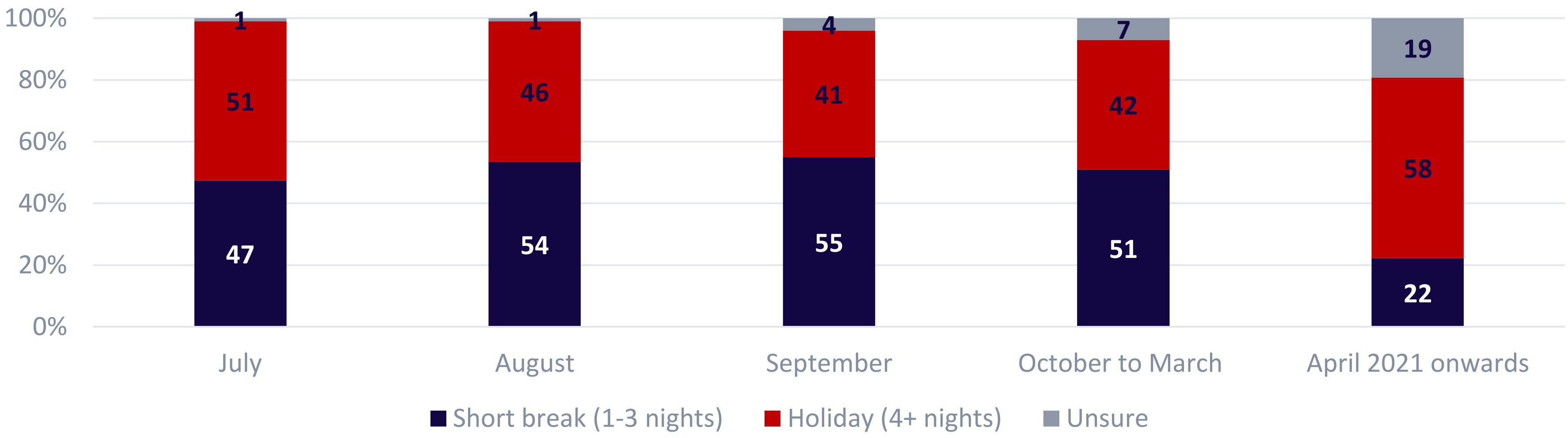


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK during July?
Base: All respondents. Week 1 n=1,753; 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; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759.

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

- In July, trips are quite evenly split between short breaks and holidays of 4+ nights, with a slight skew towards the latter. From August to next March, the majority of trips are expected to be short breaks.

Figure 21. Length of next UK holiday or short break by time period, Percentage Week 9, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 9 respondents intending to take next holiday in each time period July n=111, August n=157, September n=156, October to March n=334; April onwards n=290

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

- The South West is significantly more likely than any other part of the U.K. to receive short break and holiday visitors between July and September this year (21% intending to visit). It is followed by Scotland and the North West (both with 11% shares).
- The South West, London, and Scotland are the parts of the U.K most likely to be visited between October and next March; London more than doubles it's share from the summer.

Figure 22. Where planning on staying on next UK overnight trip in July to September, Percentage Week 7-9 merged data, UK

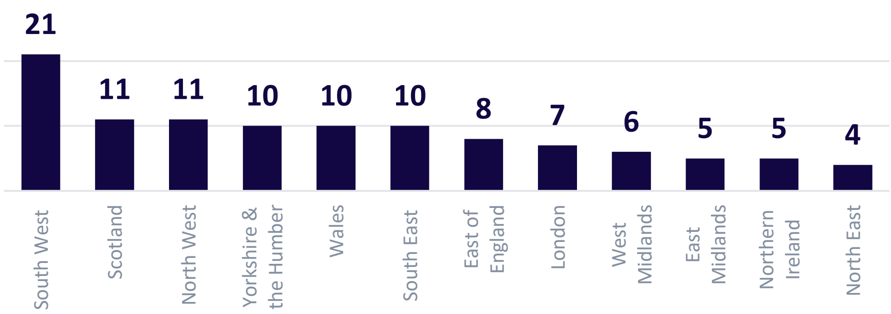
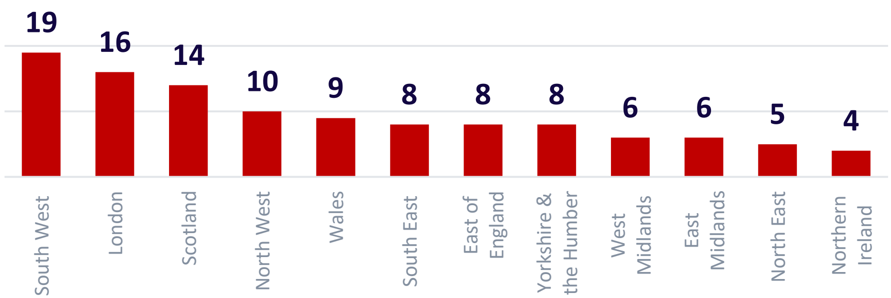


Figure 23. Where planning on staying on next UK overnight trip from October to March, Percentage Week 7-9 merged data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 7-9 respondents planning on taking a holiday or short break in the UK between July and September n=1,281 and from October to March n=1,047. 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, although significantly more so between July and September. Train is the second most preferred mode across both periods

Figure 24. Top 5 main modes of travel to destination for trip in July to September, Percentage Week 9, UK

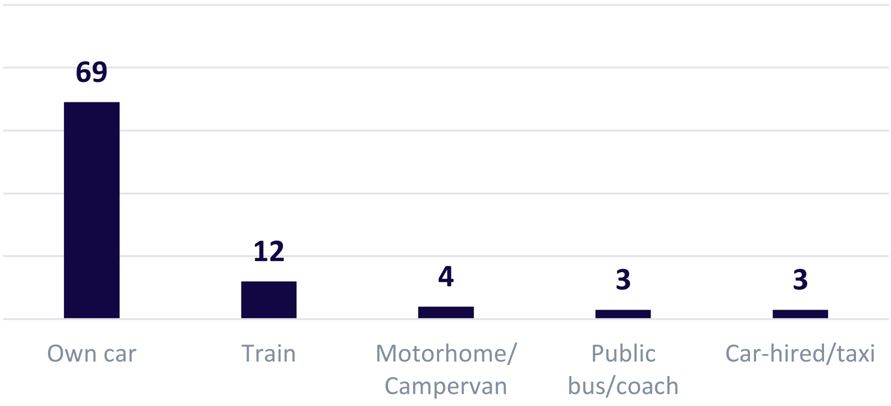
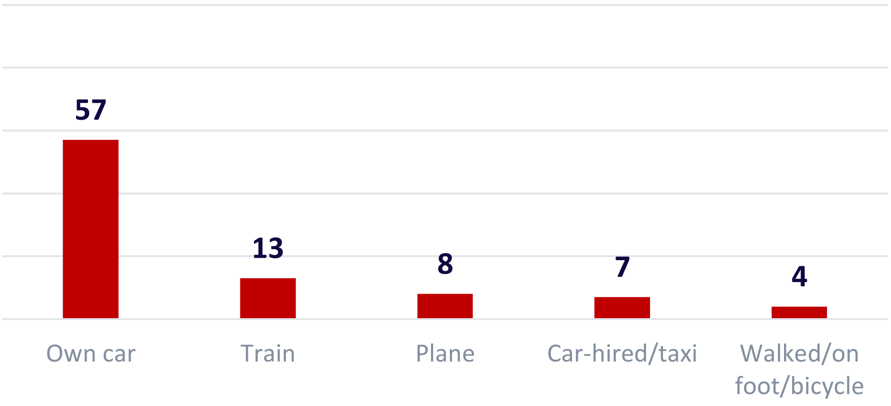


Figure 25. Top 5 main modes of travel to destination for trip from October to March, Percentage Week 9, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 9 respondents planning on taking a holiday or short break in the UK between July and September n=424 and from October to March n=334

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 trips expected to be taken between July and September.
- Between October and March, ‘city or large town’ (34%) is promoted to become the leading destination type, significantly more so than between July and September.

Figure 26. Main type of destination for trip in July to September, Percentage Weeks 7-9 merged data, UK

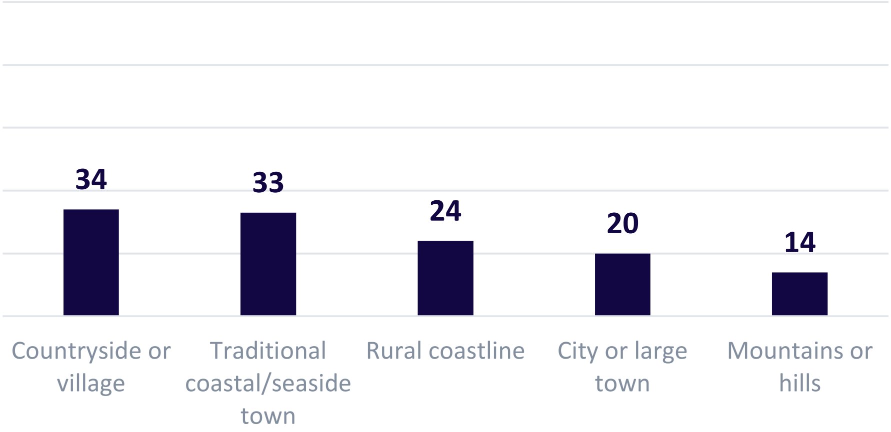
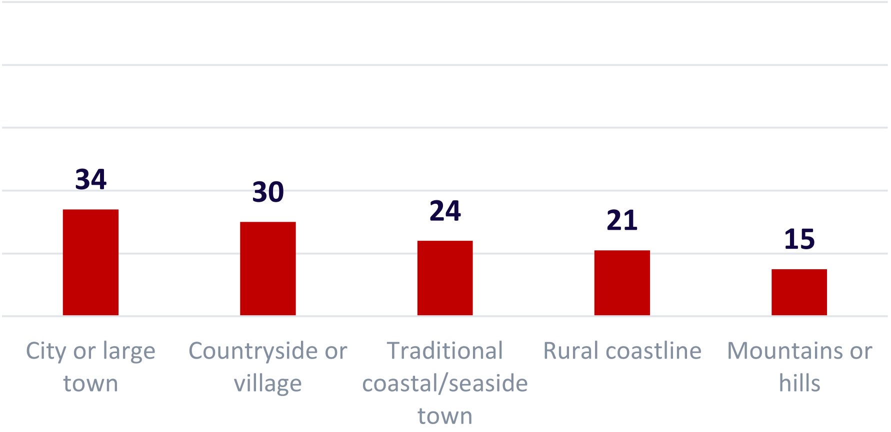


Figure 27. Main type of destination for trip from October to March, Percentage Weeks 7-9 merged data, UK



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 7-9 respondents planning on taking a holiday or short break in the UK between July and September n=1,281 and from October to March n=1,047.
Three weeks of research merged to increase statistical reliability

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

- There continues to be a broadly even split in the leading types of accommodation people are likely to use on their summer trips – 4 percentage points separate ‘caravan/camping’ (37%), ‘commercial rental’ (35%), ‘hotel/motel/inn’ (34%), and ‘private home’ (33%)
- Between October and March, ‘hotel/motel/inn’ (44%) is more likely to attract visitors than any other accommodation type, with ‘a private home’ (40%) and ‘commercial rental’ (39%) ranking second and third respectively.

Figure 28. Accommodation planning on staying in on next UK overnight trip in July to September, Net percentage Weeks 7-9 merged data, UK

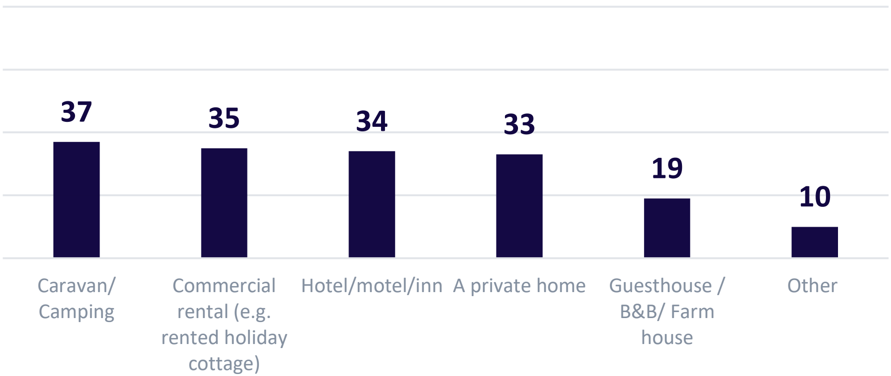
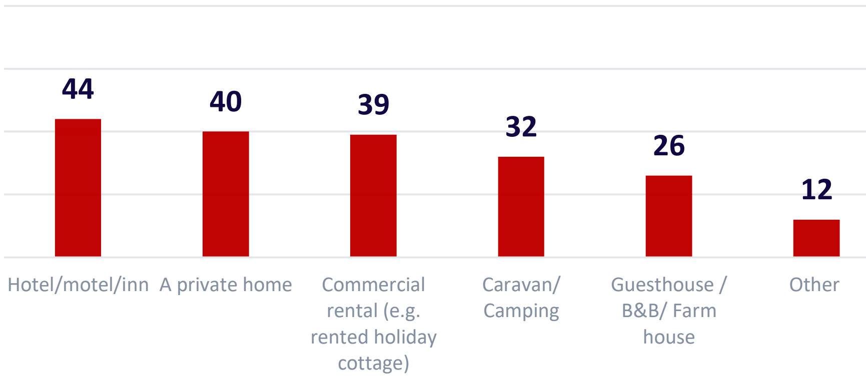


Figure 29. Accommodation planning on staying in on next UK overnight trip from October to March, Net percentage Weeks 7-9 merged data, UK

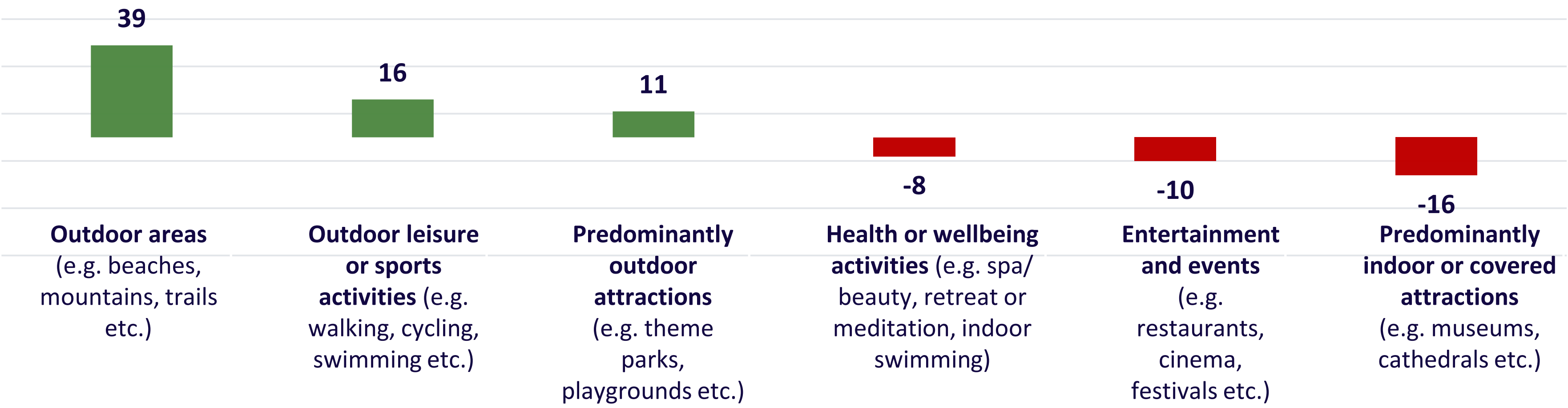


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 7-9 respondents planning on taking a holiday or short break in the UK between July and September n=1,281 and from October to March n=1,047. Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +39), followed by outdoor leisure or sports activities (net +16) and outdoor attractions (net +11). Health or wellbeing activities (net -8), entertainment and events (net -10), and indoor attractions (-16) are likely to attract fewer visitors/engagement than normal

Figure 30. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 9, UK

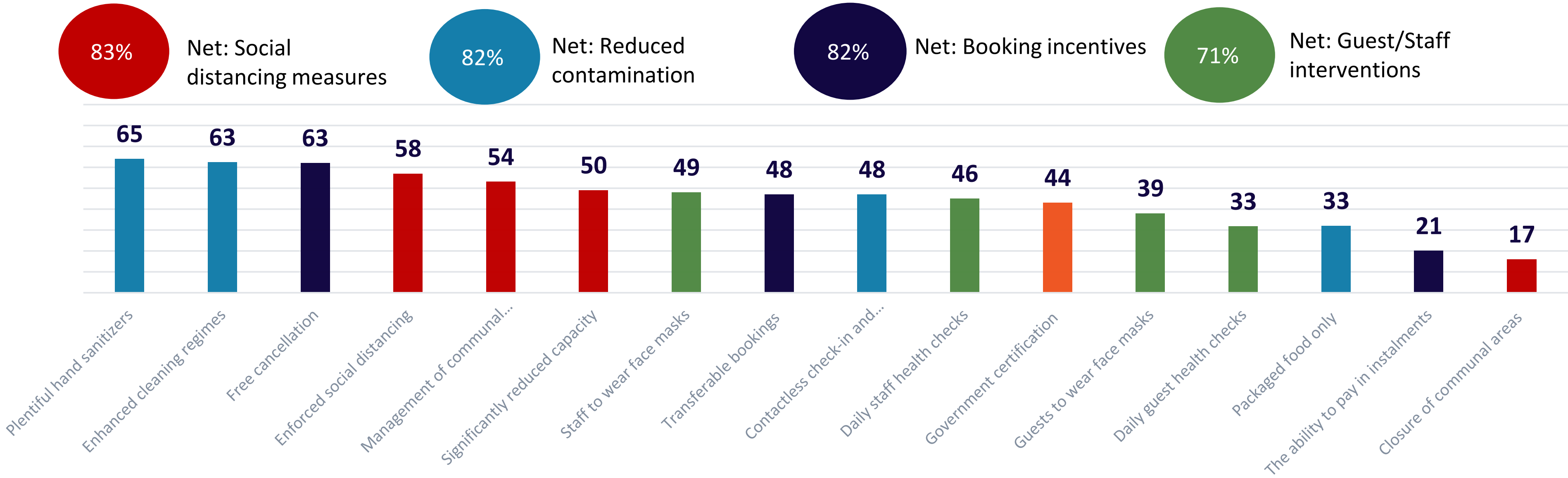


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All Week 9 respondents n=1,759

Conditions essential for people to stay in accommodation this summer

- Steps to ensure social distancing (83%), reduce cross-contamination (82%) and 'booking incentives' (82%) are the leading three assurances cited when planning a stay in serviced accommodation this summer.

Figure 31. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 9, 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 week 9 summer intenders n=424

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 9 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-8 where appropriate. Week 9 fieldwork was conducted between 13th to 17th July 2020.

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.