COVID-19 Consumer Weekly Tracker

Week 11

Fieldwork Period: 27 July – 31 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

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 11: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 10	Week 11	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')	23%	16%	-7*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.58	2.55	-0.03
Normality score (proportion expecting normality by September)	8%	6%	-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 things to do/places to visit	New No.2

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

Key Metrics	Week 10	Week 11	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% more/the same)	46%	43%	-3
Anticipated number of U.K. holidays compared to normal (% more/the same)	43%	40%	-3
UK near-term holiday/short break confidence (July/August/Sept. confident)	24%/32%/40%	20%/30%/37%	-4/-2/-3
UK medium-term holiday/short break confidence (Oct-Dec confident)	45%	44%	-1
Proportion going/been on a UK short break *or* holiday between July-Sept	32%	31%	-1
Split between holiday / short break / don't know for next trip by Sept	45%/51%/4%	42%/54%/4%	-3/+3/0

Week 11: 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 10	Week 11	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	Countryside or village/Traditional coastal or seaside town	Countryside or village	New single no. 1
Main accommodation type likely to stay in between July - Sept	Caravan/camping	Caravan/camping and Commercial rental	New joint no. 1

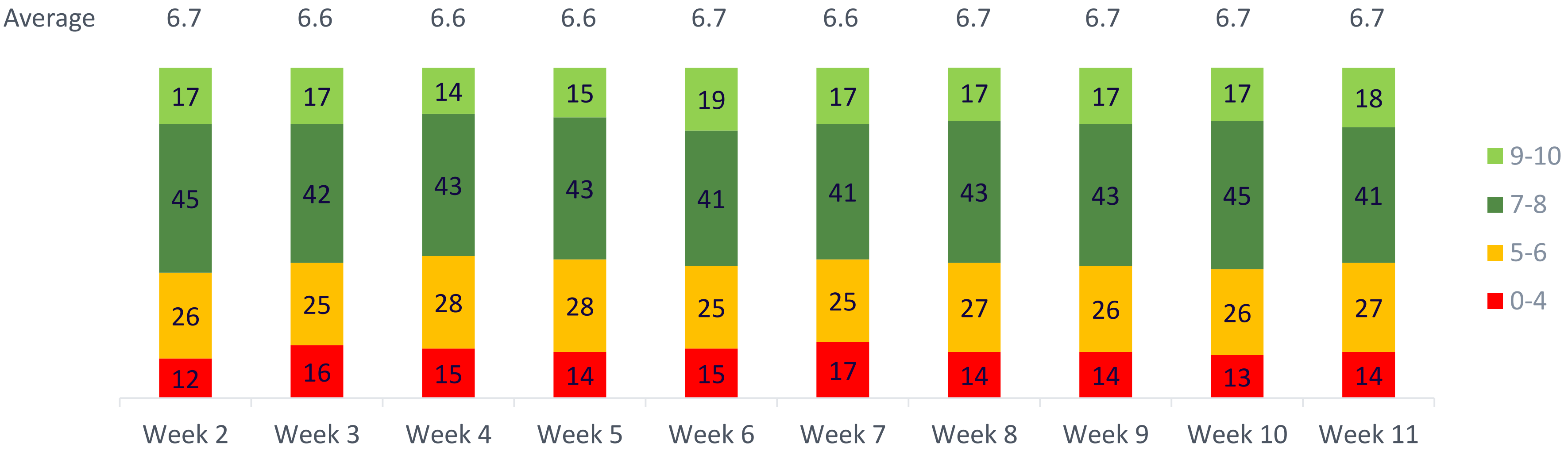
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 10	Week 11	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 remains at 6.7 out of 10 for the 4th week in succession
- There has been a marginal increase in those rating 0-6 out of 10 but the national mood is largely consistent with week 10

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

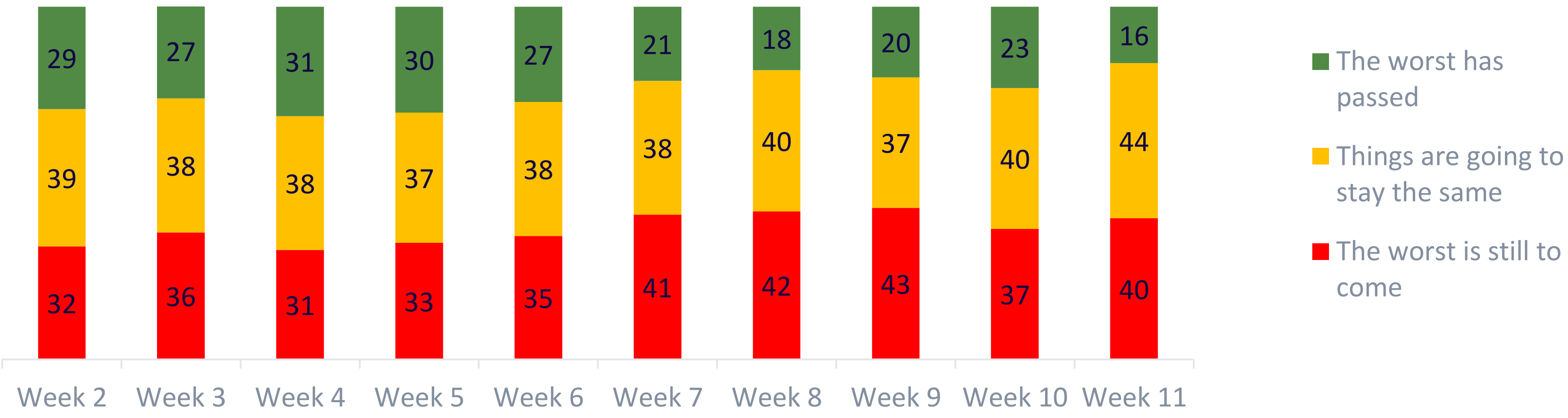


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 11 n=1,913

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

- 16% of the U.K. adult population feel that ‘the worst has passed’ in relation to COVID-19. This represents the lowest proportion seen so far and significantly lower than week 10.
- The proportion believing the ‘worst is still to come’ edges up to 40%.

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 11 n=1,913

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

- 6% of U.K. adults believe that life will return to 'something close to normal' by September.
- The proportion expecting normality by December drops to 22%, significantly lower than the previous week and the lowest recorded thus far.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 11, UK

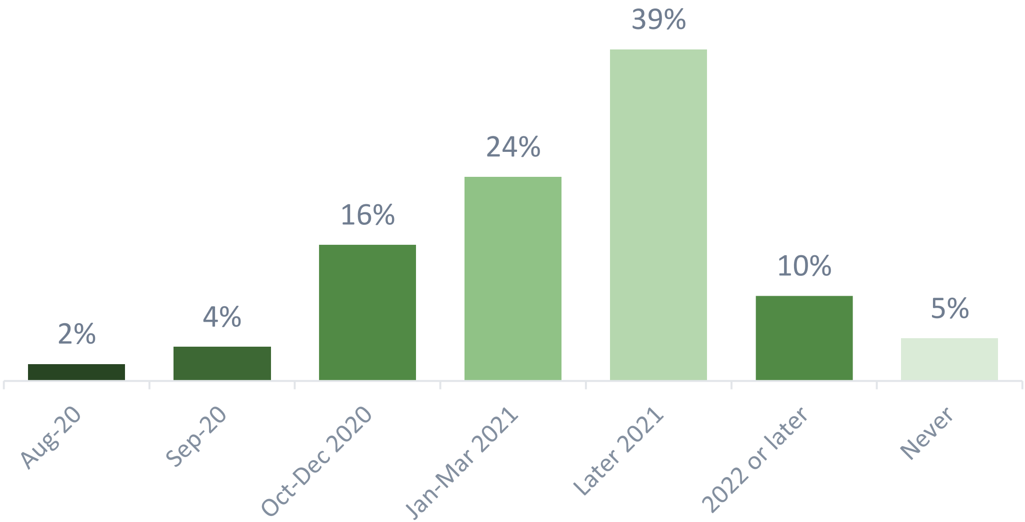


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

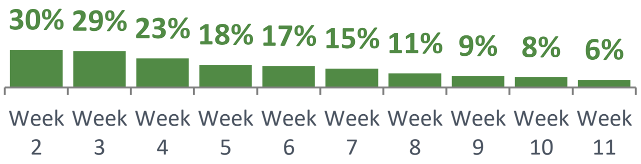
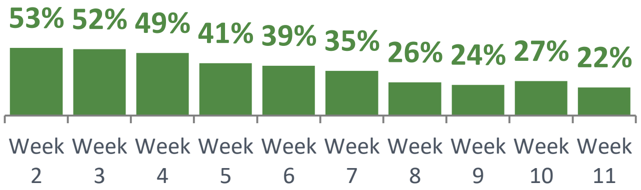


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

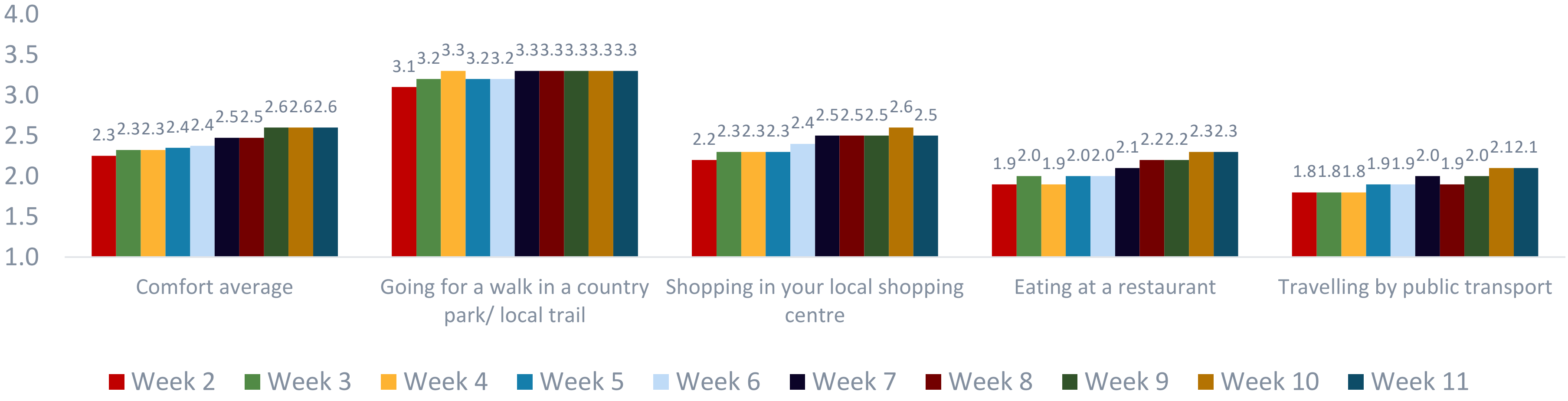


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 11 n=1,913

Appetite for Risk

- The 'comfort average' remains stable at 2.6/4 (4 representing 'very comfortable')
- Comfort scores have remained consistent for all activities, with the exception of 'shopping in your local shopping centre' which marginally declines to 2.5

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 11 n=1,913

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

- 3 in 10 are confident they would be able to take a U.K. short break or holiday in August (if they had one booked).
- 44% express confidence in being able to take a trip between October and December this year.
- Both proportions are slightly down versus Week 10.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 11, UK

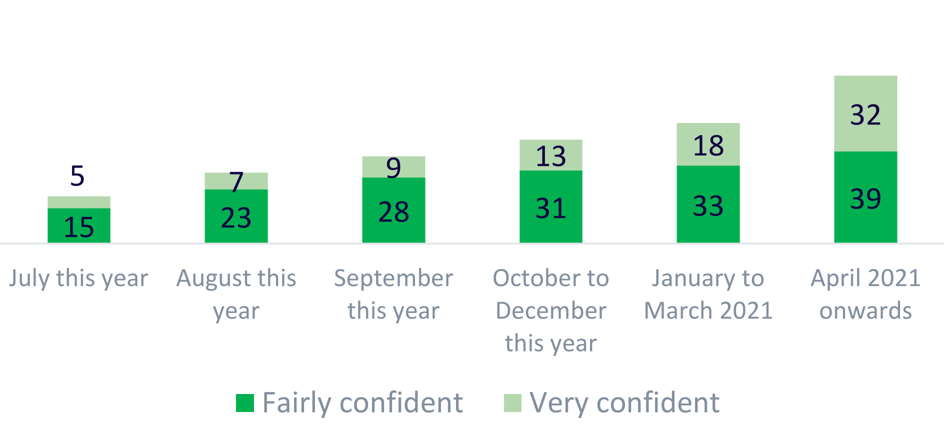


Figure 8. Confidence in taking a UK short break or holiday in August, Percentage week-on-week, UK

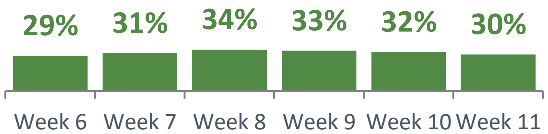
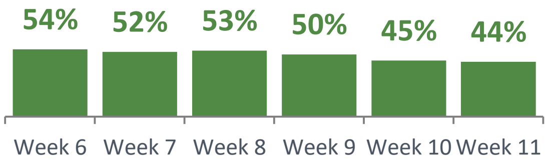


Figure 9. Confidence in taking a UK short break or holiday in October - December, Percentage week-on-week, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the 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 11 respondents n=591

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

- ‘Concerns about catching COVID-19’ (at 42%) remains the leading reason for not feeling confident about travelling between July and September this year. A similar proportion cite ‘fewer things to do/places to visit (41%) and around a third state ‘fewer opportunities to eat/drink out’ (34%)
- From October onwards, ‘concerns about catching COVID-19’ remains the leading reason, 52% stating this. All other reasons are significantly less frequently cited but are led by a sense of responsibility and unease around travelling domestically during this period.

Figure 10. Top 5 reasons for not being confident about travelling between July to September, Percentage Week 11, UK

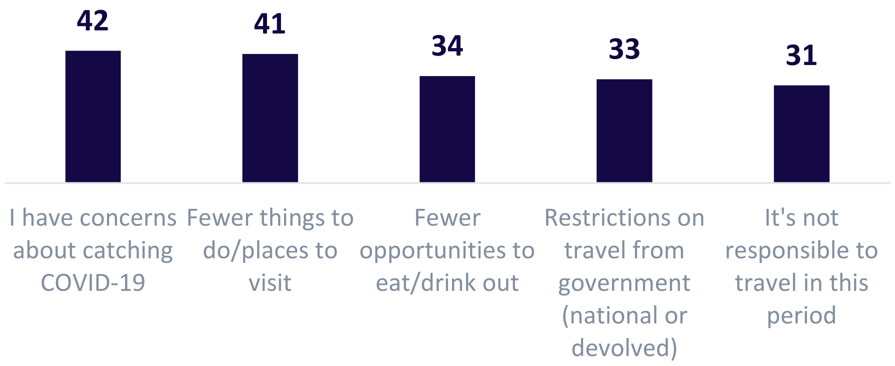
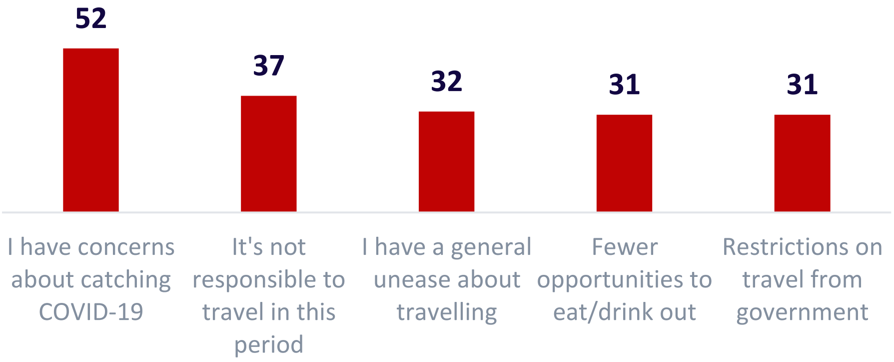


Figure 11. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 11, UK



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 11 respondents not confident about taking a break between July and September n=252 and from October onwards n=252.

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

- The proportion either expecting to take more or the same amount of U.K. short breaks or holidays compared to normal has marginally decreased since last week. 43% intend to take the same amount or more U.K. short breaks (compared to 46% last week), with 40% expressing this for holidays of 4+ nights (43% last week).

Figure 12. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 11, UK

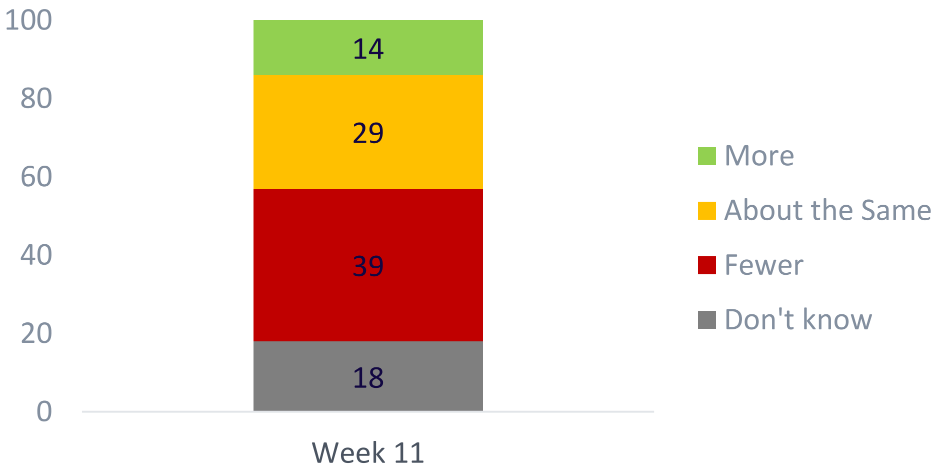
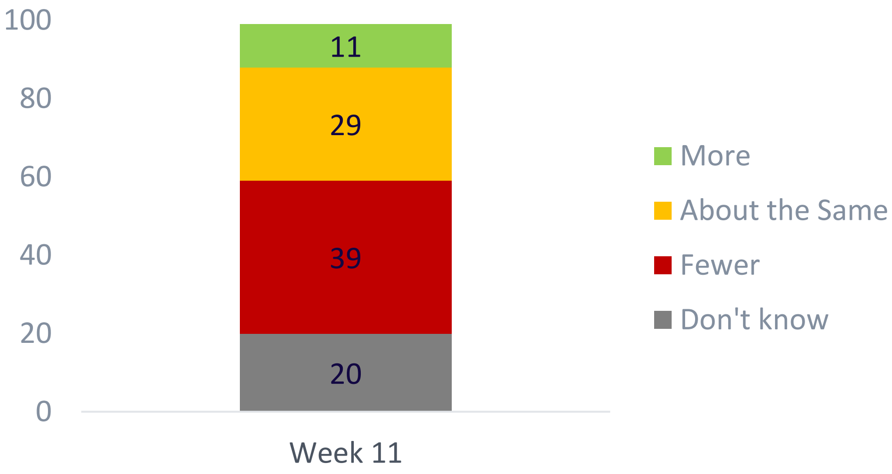


Figure 13. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 11, UK



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 11 respondents n=1,913

Anticipated number of OVERSEAS trips this year compared to normal

- 28% of U.K. adults intend to take more or about the same number of overseas short breaks compared to normal; the same as week 10. 26% intend to take more or about the same overseas *holidays*, which is down from 29% last week

Figure 14. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 11, UK

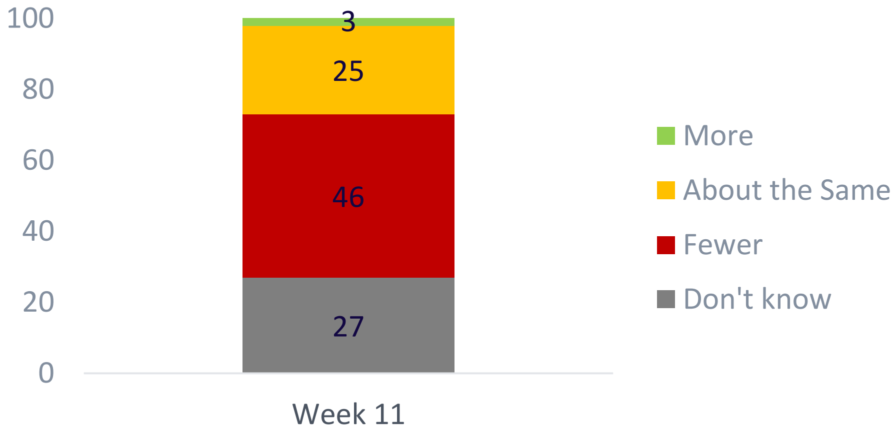
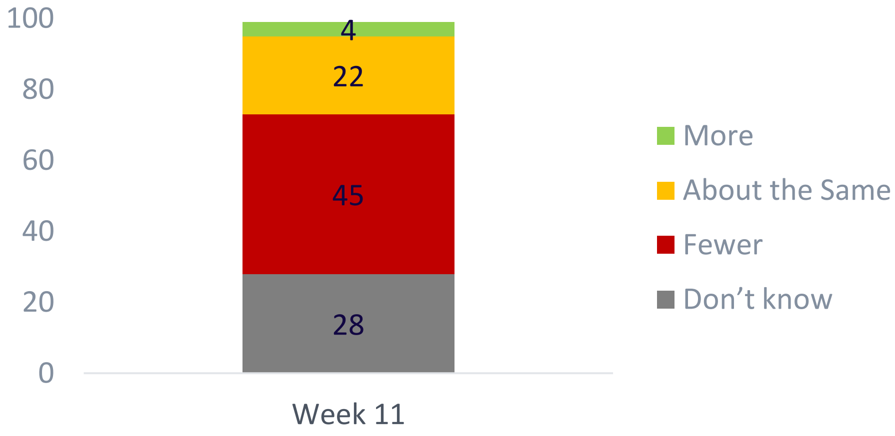


Figure 15. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 11, UK

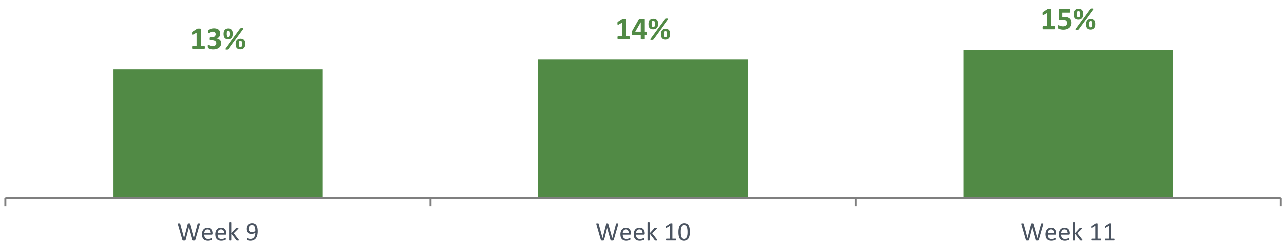


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All Week 11 respondents n=1,913

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

- 15% of U.K. adults say they *have already taken* a U.K. short break or holiday in July.

Figure 16. Proportion that have already been on a trip in July, Percentage week-on-week, 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 Week 11 respondents n=1,913

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

- 18% have already planned and 14% already booked their next U.K. short break or holiday; a similar proportion to week 10.
- 1 in 4 U.K. adults, have no intention of travelling; this is significantly up from the 1 in 5 recorded in week 10.

Figure 17. When anticipate PLANNING next UK holiday or short break, Percentage Week 11, UK

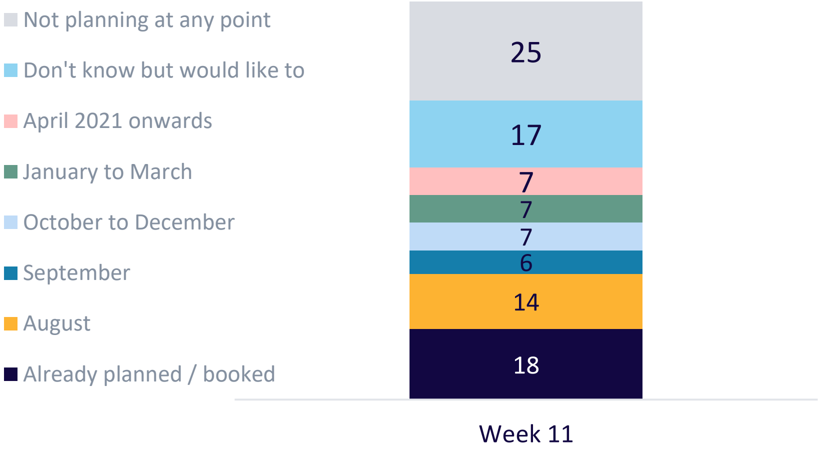
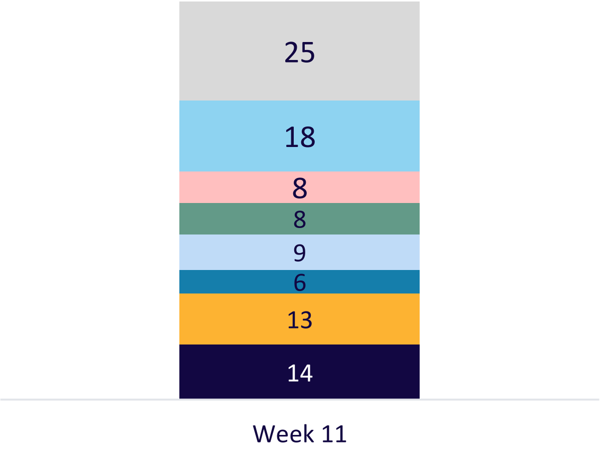


Figure 18. When anticipate BOOKING next UK holiday or short break, Percentage Week 11, UK



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 11 respondents n=1,913

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

- 21% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, however adding in those who have already been on a trip in July, the 'July to September' figure rises to 31%.

Figure 19. When anticipate GOING on next UK trip, Percentage Week 11, UK

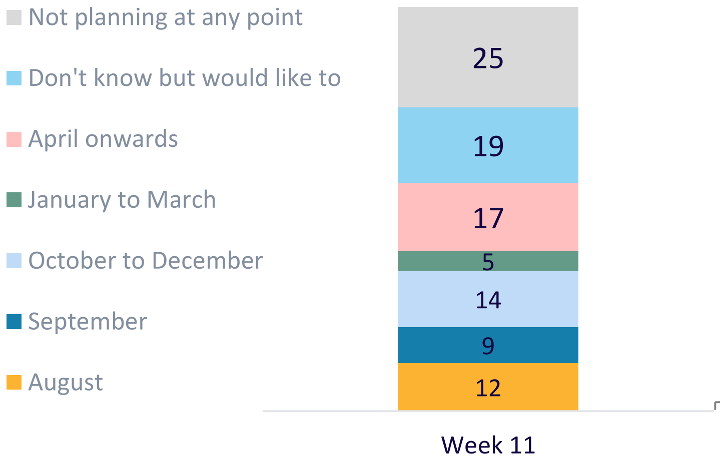
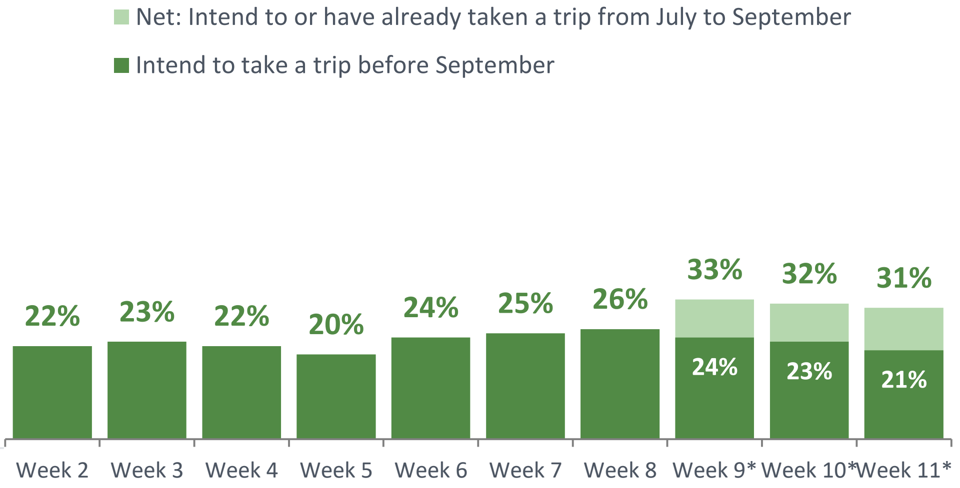


Figure 20. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK



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 11 n=1,913. *Light shade is percentage who have already been on a trip this summer.

Proportion that have already planned or booked their next U.K. holiday or short break

- Just over half of U.K. adults who are intending to take a domestic trip this summer have already planned it. The proportion that have already booked it has risen significantly this week to 44% (from 36% in week 10). Winter intenders have also experienced a rise in planning and booking with 1 in 4 having already planned their trip while 17% have booked it.

Figure 21. Proportion of Intenders that have already *planned* their trip, Percentage Week 11, UK

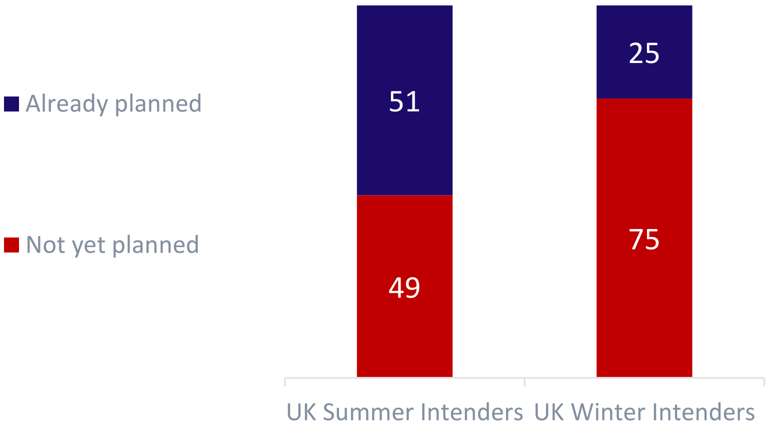
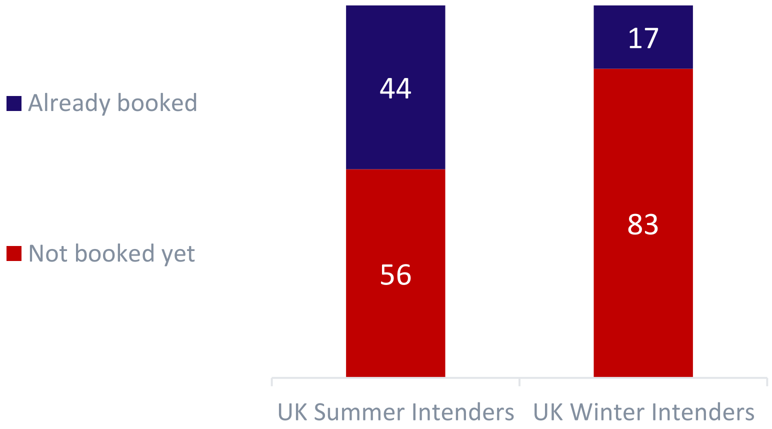


Figure 22. Proportion of Intenders that have already *booked* their trip, Percentage Week 11, UK

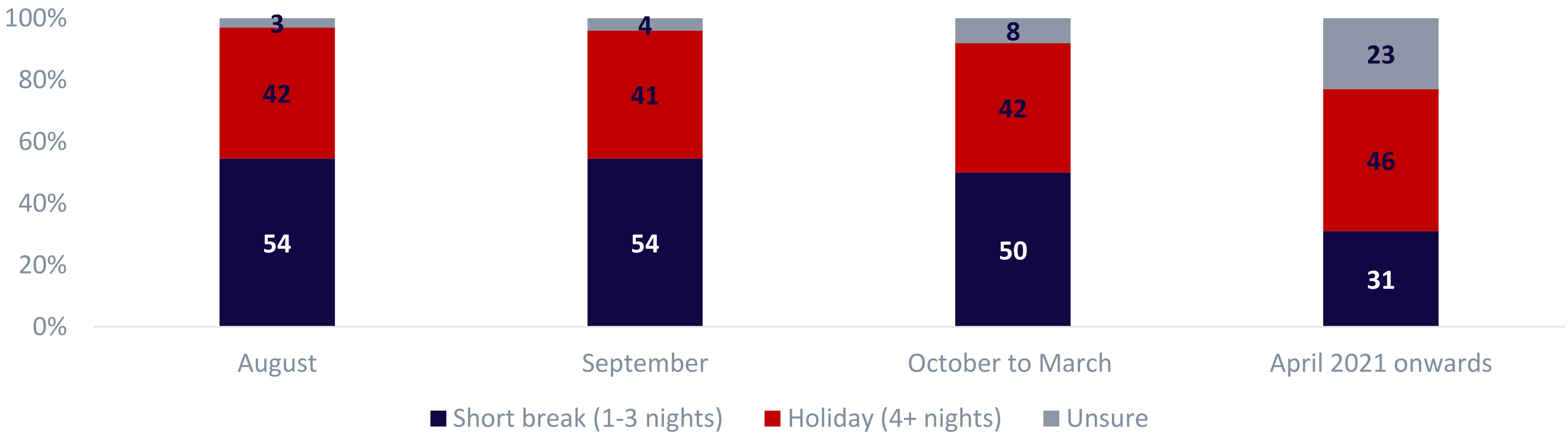


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All week 11 respondents planning on taking a holiday or short break in the UK by September n=384 and from October to March n=369

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

- In August and September, trips are more likely to be short breaks than holidays of 4+ nights. The same is the case for trips anticipated to be taken between October and March, but with a more even split. Holidays are more predominant from April 2021 onwards, but understandably a considerable proportion are also unsure given the lengthy time horizon before the trip takes place.

Figure 23. Length of next UK holiday or short break by time period, Percentage Week 11, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 11 respondents intending to take next holiday in each time period August n=216, September n=168, October to March n=369; April onwards n=329

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

- The South West is significantly more likely to receive short break and holiday visitors by September compared to any other part of the U.K. (22% intending to visit). This is followed by Scotland (12%) and the North West (11%).
- The South West, London, and Scotland are the parts of the UK most likely to receive domestic visitors between October 2020 and March 2021; London more than doubles its share compared to the summer, moving into joint second place with Scotland (15% shares respectively).

Figure 24. Where planning on staying on next UK overnight trip by September, Percentage Weeks 9-11 merged data, UK

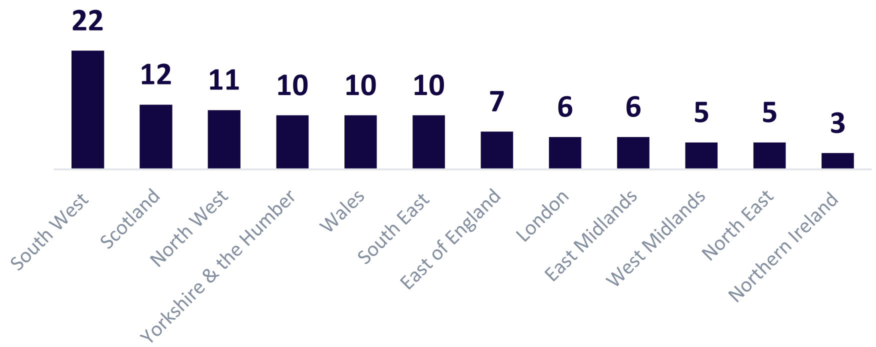
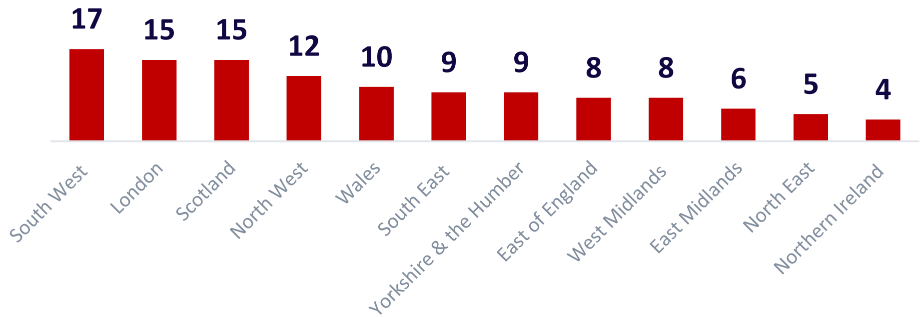


Figure 25. Where planning on staying on next UK overnight trip from October to March, Percentage Weeks 9-11 merged data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 9-11 respondents planning on taking a holiday or short break in the UK by September n=1,199 and from October to March n=1,076. 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 before October. Train is the second most preferred mode across both periods as plane leads the sub-10% category

Figure 26. Top 5 main modes of travel to destination for trip by September, Percentage Week 11, UK

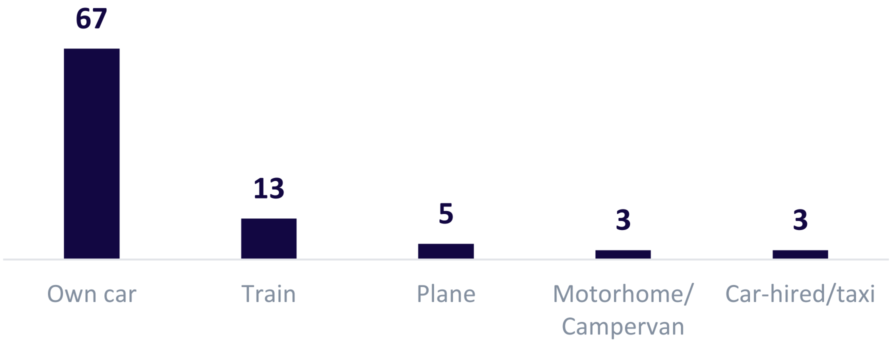
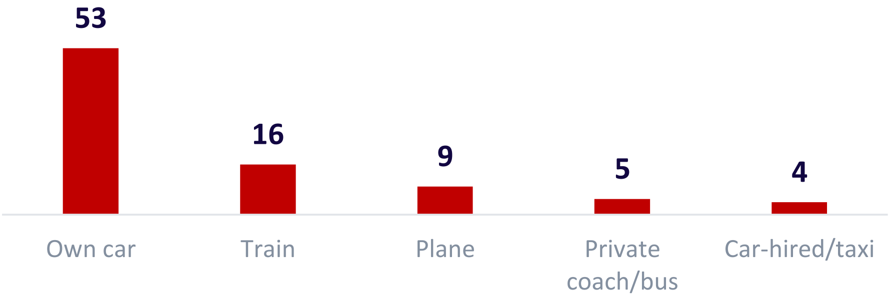


Figure 27. Top 5 main modes of travel to destination for trip from October to March, Percentage Week 11, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 11 respondents planning on taking a holiday or short break in the UK by September n=384 and from October to March n=369

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

- ‘Countryside or village’ (36%) moves slightly ahead of ‘traditional coastal/seaside town’ (33%) as the main destination type for a trip this summer. ‘Rural coastline’ and ‘city or large town’ (both 22%) are the next most preferred destination types although significantly less so
- Between October and March, ‘city or large town’ (31%) is the leading destination type; significantly more so than for summer trips. Just behind in second place is ‘countryside or village’ while ‘traditional coastal/seaside town’ drops to 25% share.

Figure 28. Main type of destination for trip by September, Percentage Weeks 9-11 merged data, UK

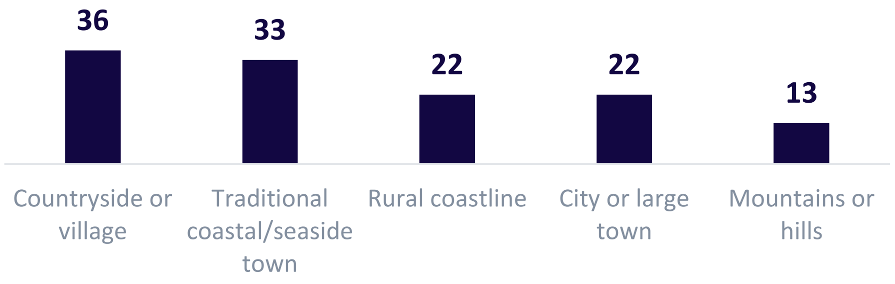


Figure 29. Main type of destination for trip from October to March, Percentage Weeks 9-11 merged data, UK

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 9-11 respondents planning on taking a holiday or short break in the UK between July and September n=1,199 and from October to March n=1,076.
Three weeks of research merged to increase statistical reliability

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

- Little separates the leading four accommodation types for summer trips, jointly led by ‘caravan/camping’ and ‘commercial rental’ (both 34%) followed by private home (33%) and ‘hotel/motel/inn’ with a 31% share.
- For trips planned between October 2020 and March 2021, ‘caravan/camping’ understandably ranks lower although its overall share is similar to the summer period. For winter, ‘private home’ leads on 41%, closely followed by ‘commercial rentals’ and ‘hotel/motel/inn’.

Figure 30. Accommodation planning on staying in on next UK overnight trip by September, Net percentage Weeks 9-11 merged data, UK

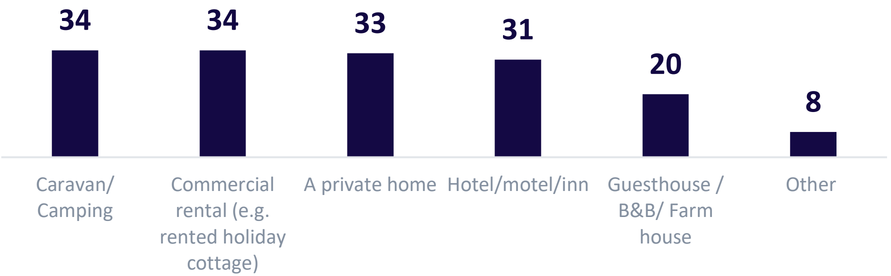
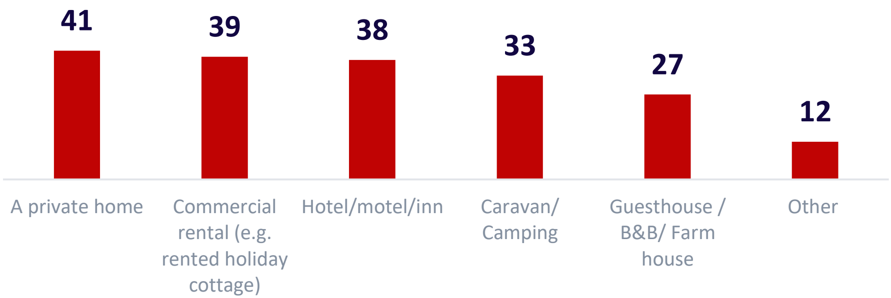


Figure 31. Accommodation planning on staying in on next UK overnight trip from October to March, Net percentage Weeks 9-11 merged data, UK

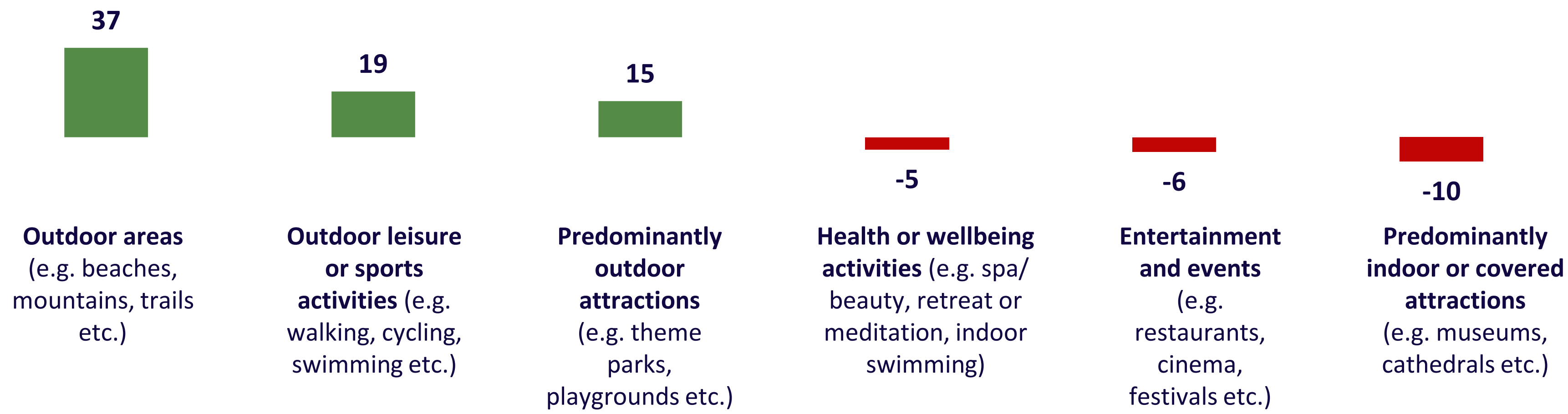


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 9-11 respondents planning on taking a holiday or short break in the UK by September n=1,199 and from October to March n=1,076.
Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +37), followed by outdoor leisure or sports activities (net +19) and outdoor attractions (net +15). Health or wellbeing activities (net -5), entertainment and events (net -6), and indoor attractions (net -10) are likely to attract fewer visitors/engagement than normal with the intent for these activities marginally declining versus last week.

Figure 32. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 11, UK

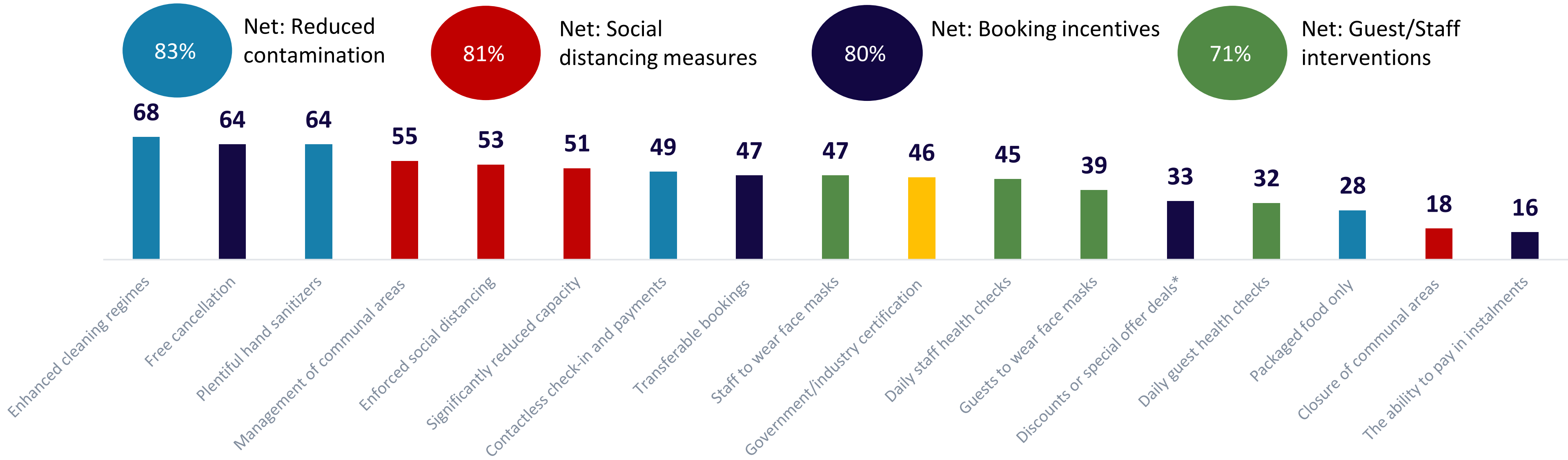


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All Week 11 respondents n=1,913

Conditions essential for people to stay in accommodation this summer

- Steps to reduce contamination (83%), ensure social distancing (81%) and 'booking incentives' (80%) are the top three assurances the public need when planning a stay in accommodation this summer.
- Offering 'free cancellations' continues to be the second most cited essential condition for accommodation providers to have in place.

Figure 33. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 11, 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 11 summer intenders n=384. * Added in week 11

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 11 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-10 where appropriate. Week 11 fieldwork was conducted between 27th to 31st 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.