COVID-19 Consumer Weekly Tracker

Week 13

Fieldwork Period: 10 August – 14 August

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 13: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 12	Week 13	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')	12%	14%	+2
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.6	2.6	=
Normality score (proportion expecting normality by September)	3%	1%	-2*
The main reasons for not feeling confident about taking a trip between by September (Top 2)	1. Concerns about catching COVID-19 2. Restriction on travel from gov.	1. Concerns about catching COVID-19 2. Restriction on travel from gov.	No change

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

Key Metrics	Week 12	Week 13	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% more/the same)	42%	43%	+1
Anticipated number of U.K. holidays compared to normal (% more/the same)	39%	38%	-1
UK near-term holiday/short break confidence (Aug/Sept. confident)	31%/33%	31%/34%	0/-1
UK medium-term holiday/short break confidence (Oct-Dec confident)	38%	41%	+3
Proportion going/been on a UK short break *or* holiday between July-Sept	30%	28%	-2
Split between holiday / short break / don't know for next trip by Sept	41%/55%/5%	39%/56%/6%	-2/+1/+1

Week 13: 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 12	Week 13	Weekly Shift
Leading England destination likely to stay in between Aug – Sept	South West	South West	No change
Main *type* of destination likely to stay in between Aug – Sept	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between Aug – Sept	Caravan/camping	Hotel/motel/inn	New no.1

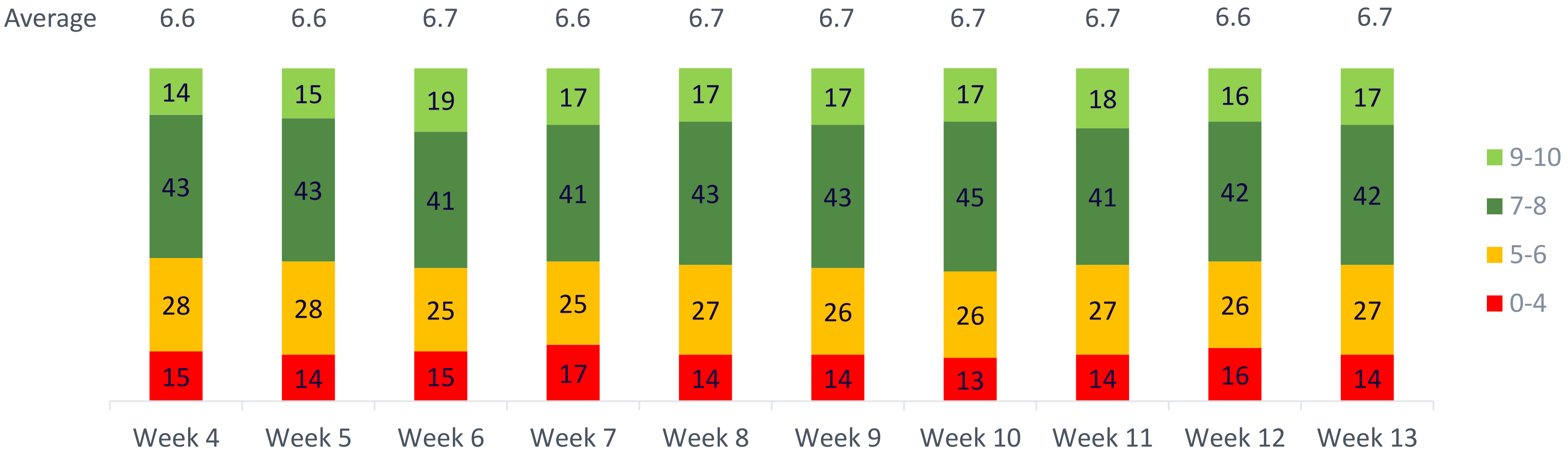
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 12	Week 13	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

- The average mood of UK residents is 6.7 out of 10; broadly consistent with the scores since the beginning of the research
- The slightly higher average score is driven by a marginal fall in respondents providing a 0-4 out of 10 rating, from 16% in Week 12 to 14% in Week 13

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

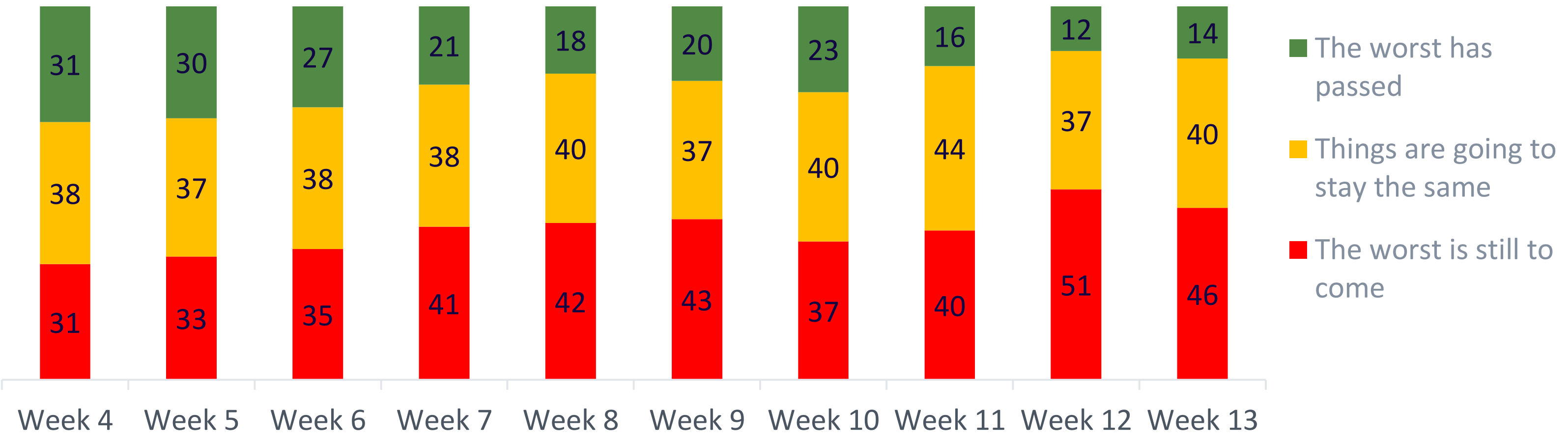


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 13 n=1,759

Perceptions of the situation in relation to COVID-19

- 46% of the adult population feel the worst is still to come in relation to COVID-19, a significant drop on the 51% that stated this last week, but still the second highest percentage since the start of the research

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 13 n=1,759

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

- Almost nobody now expects 'normality' to return by September. 18% of week 13 respondents expect some sort of normality by December this year, higher than the 15% stating this in week 12, although still significantly lower than any previous week.
- 60% of UK adults believe things won't return 'close to normal' before April next year.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 13, UK

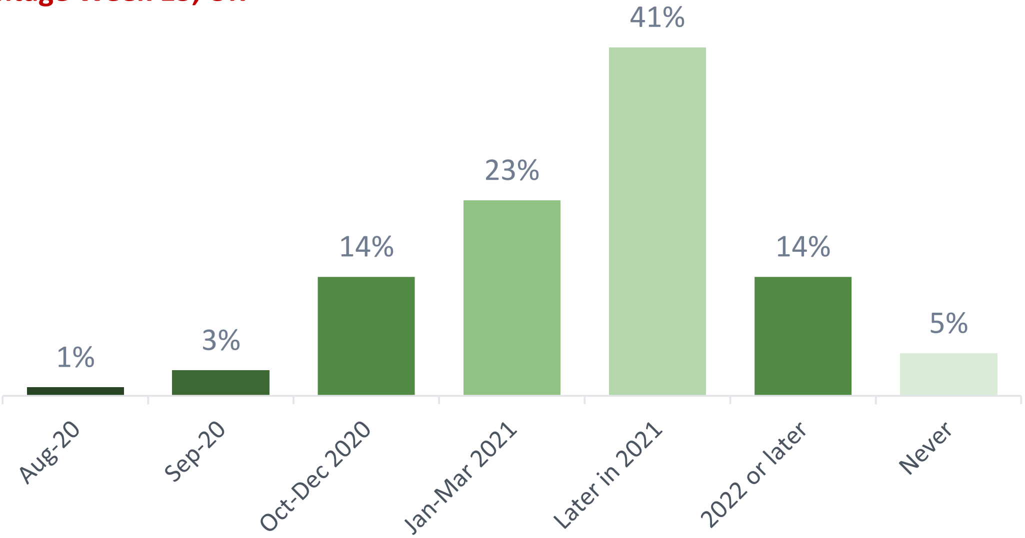


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

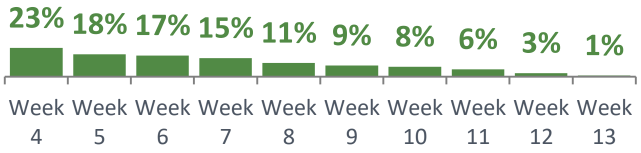
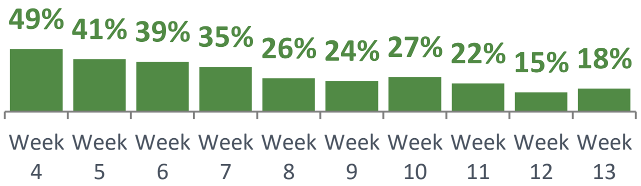


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

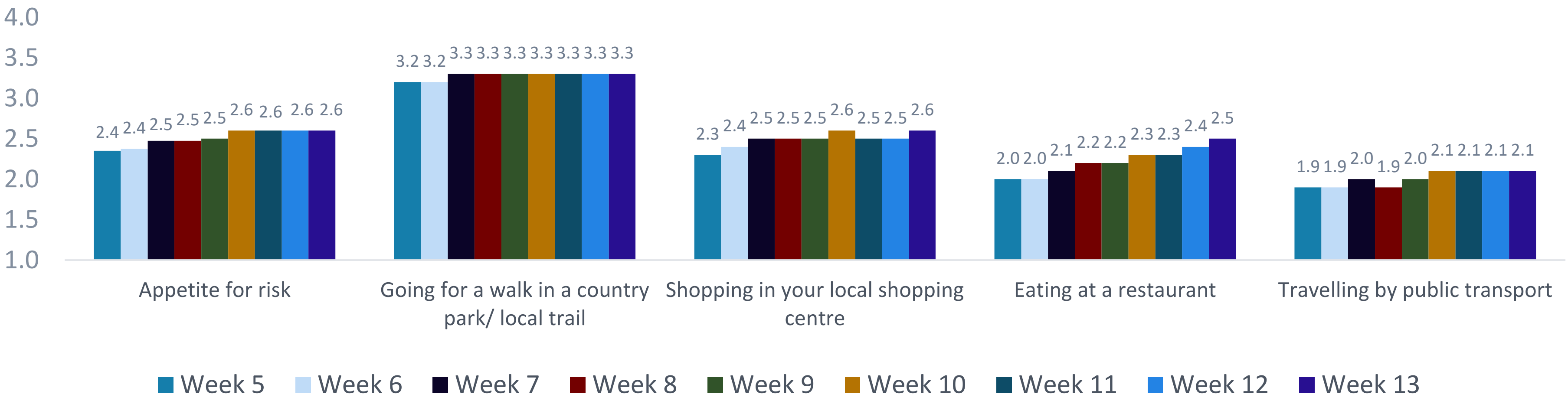


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 13 n=1,759

Appetite for Risk

- The ‘appetite for risk’ score remains stable at 2.6 (out of 4)
- ‘Eating at a restaurant’ is the activity that has exhibited the most sustained increases in levels of comfort on a week-by-week basis

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: appetite for risk’ is calculated as a straight average of the four scores. Week 13 n=1,759

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

- Confidence in the ability to take a U.K. short break or holiday in August is stable at 31%.
- Confidence in taking a domestic trip later in the year (between October – December) has increased to 41% following last week's dip in sentiment, but remains lower than week 11 and prior weeks

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 13, UK

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

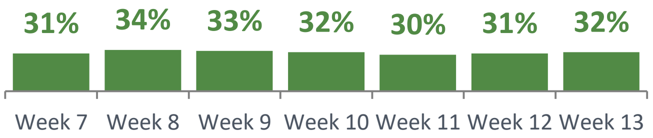
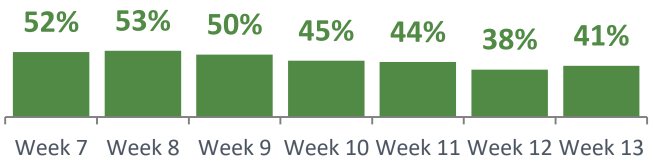


Figure 9. Confidence in taking a UK short break or holiday in October - December, Percentage week-on-week, UK



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 respondents. Week 13 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 people cite for not feeling confident about taking a U.K. holiday or short break either by September this year or from October onwards. 'Restrictions on travel from government' has become the second most influential reason across both time periods.

Figure 10. Top 5 reasons for not being confident about travelling by September, Percentage Week 13, UK

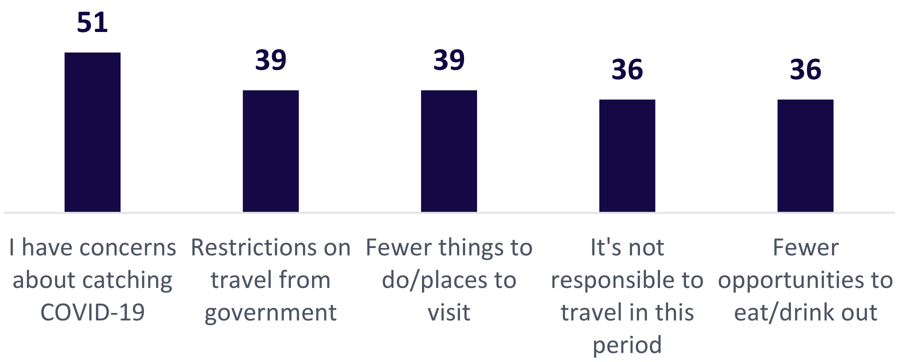
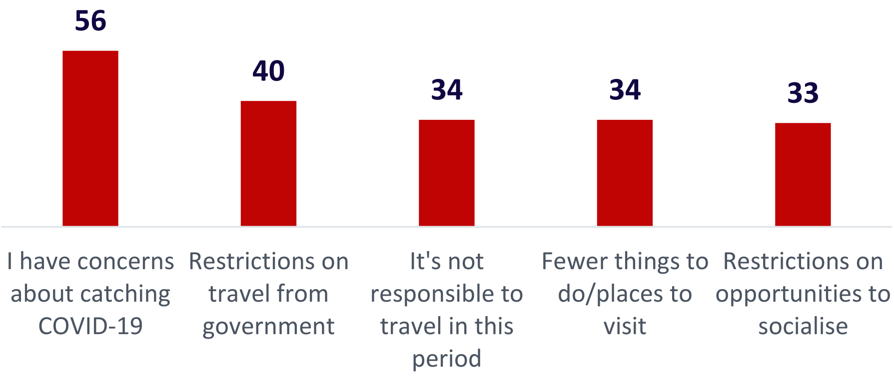


Figure 11. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 13, UK



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 by September n=564 and from October onwards n=559.

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

- 43% of U.K. adults intend to take the same or more domestic short breaks compared to normal (versus 42% last week), with 38% expressing this for holidays of 4+ nights (39% last week).
- 38% and 40% respectively feel they are likely to take fewer of both types of trip, and around 1 in 5 remain unsure.

Figure 12. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 13, UK

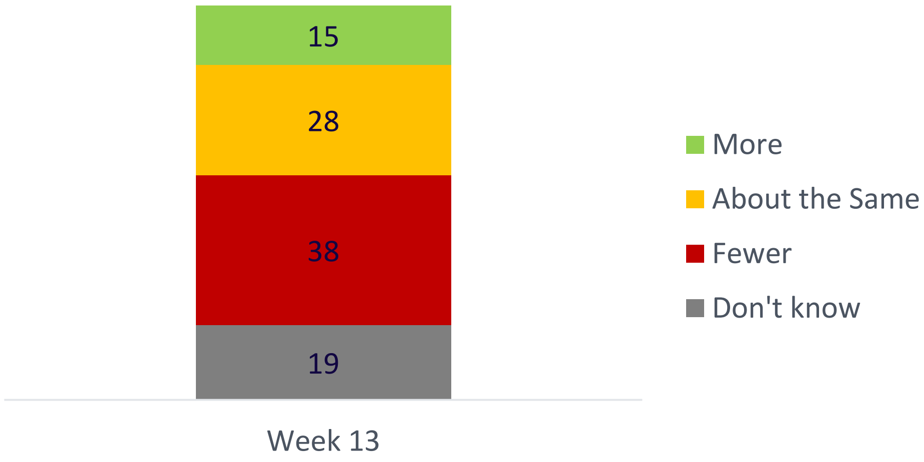
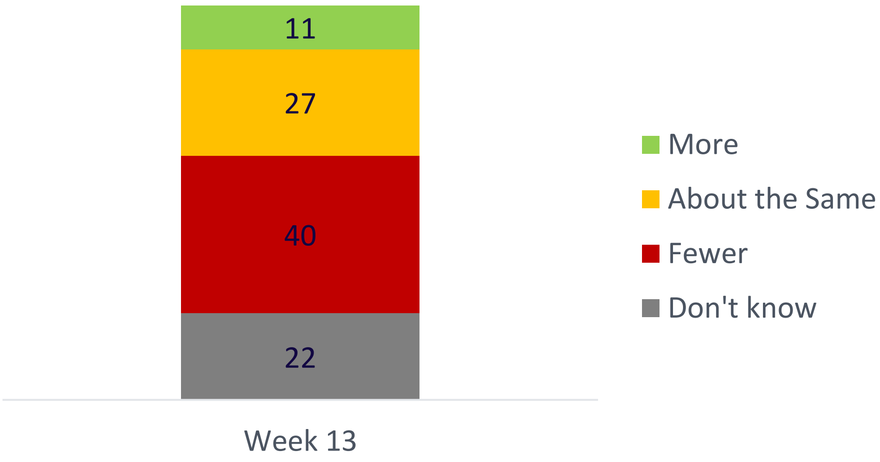


Figure 13. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 13, UK



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 respondents. Week 13 n=1,759

Anticipated number of OVERSEAS trips this year compared to normal

- 26% of U.K. adults intend to take more or about the same number of overseas short breaks and holidays of 4+ nights by the end of the year compared to normal.
- Just under half (46%) intend to take fewer of both types of trips, while just over a quarter (27%) don't know.

Figure 14. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 13, UK

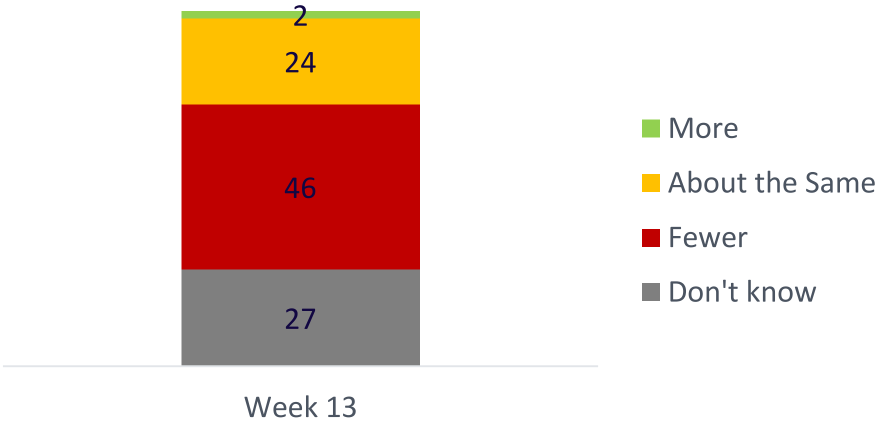
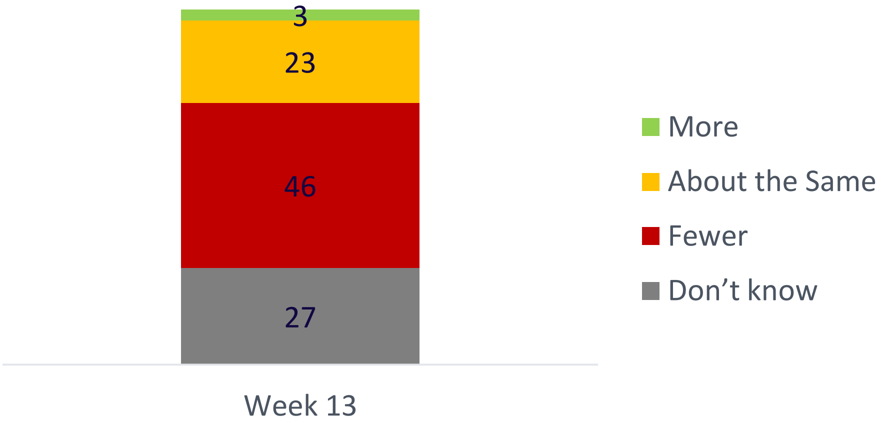


Figure 15. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 13, UK

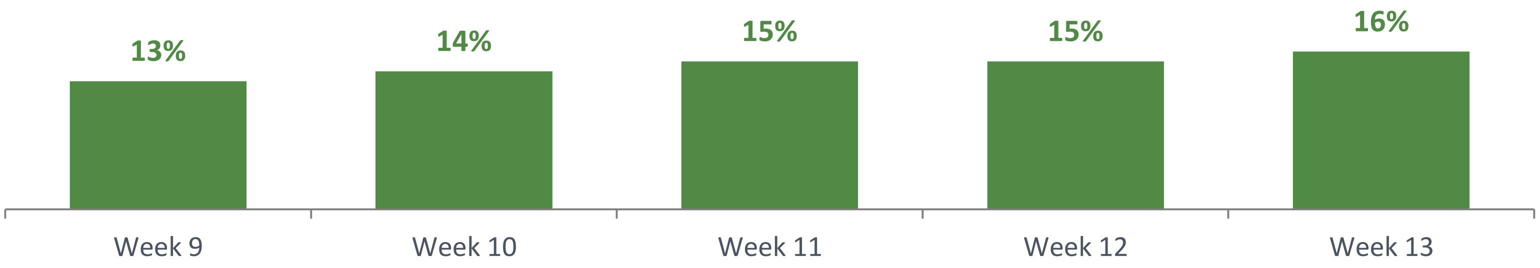


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All respondents. Week 13 n=1,759

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

- 16% of U.K. adults state they *have already taken* a domestic short break or holiday since the start of July, a slight increase on week 12.

Figure 16. Proportion that have already been on a U.K. trip since the start of 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 since the start of July?
Base: All respondents. Week 13 n=1,759

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

- 16% have already planned and 12% have already booked their next U.K. short break or holiday
- A further 17% intend to plan, and 12% intend to book, their next trip in either August or September.

Figure 17. When anticipate PLANNING next UK holiday or short break, Percentage Week 13, UK

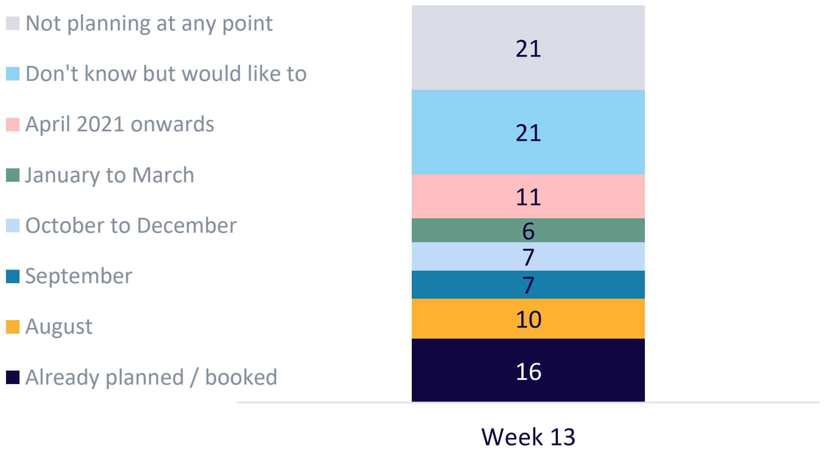
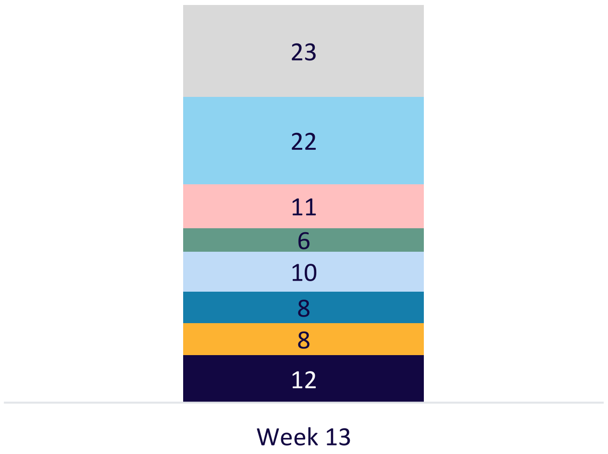


Figure 18. When anticipate BOOKING next UK holiday or short break, Percentage Week 13, UK



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 13 n=1,759

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

- 17% of U.K. adults plan on going on a U.K. holiday or short break by the end of September. Although this represents a drop for the fourth consecutive week, it is unsurprising given the shortening time frames as each week goes by
- When combined with those that have *already* been on a trip since July, the proportion of July-September domestic holiday-makers is 28%, a slight drop on week 12

Figure 19. When anticipate GOING on next UK trip, Percentage Week 13, UK

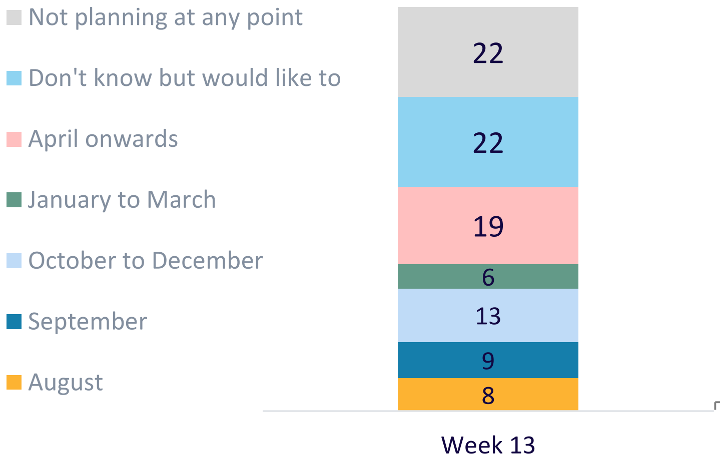
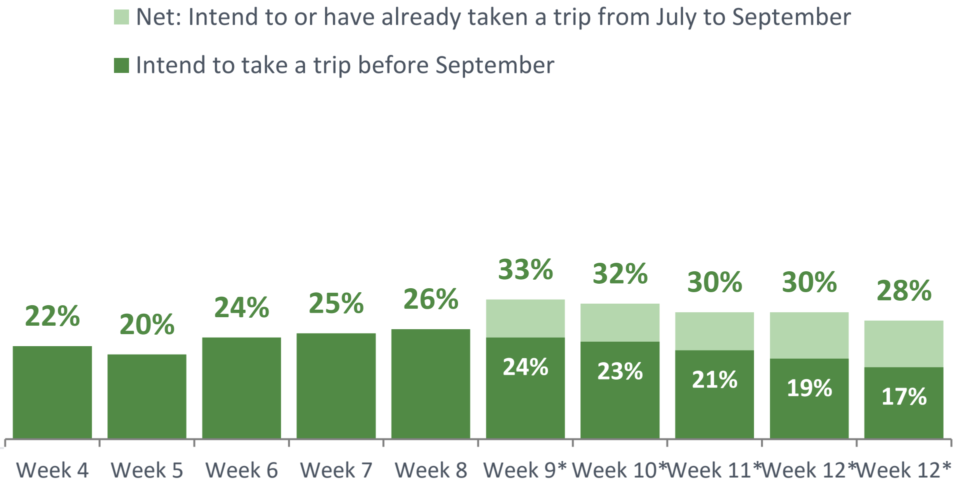


Figure 20. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK



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 13 n=1,759. *Light shade is percentage who have already been on a trip between July and September

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

- 42% of summer intenders have not yet planned their next U.K. holiday or short break with 53% still yet to book. A minority of winter intenders have booked or planned their trips

Figure 21. Proportion of Intenders that have already *planned* their trip, Percentage Week 13, UK

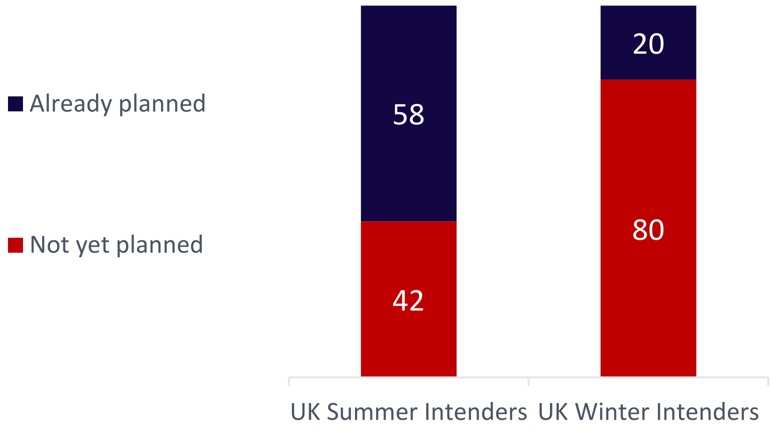
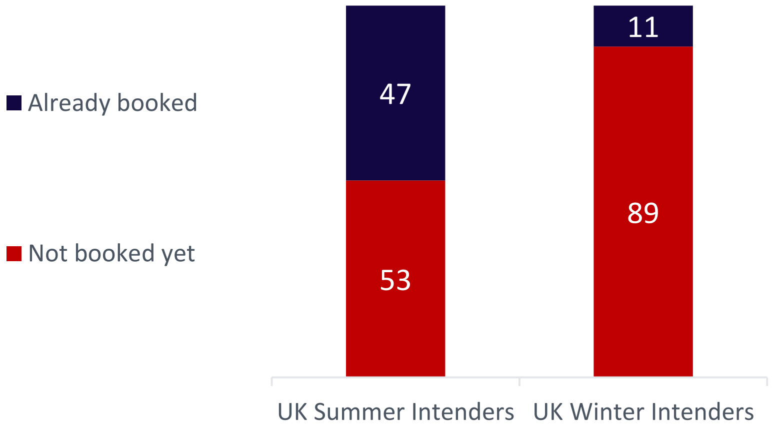


Figure 22. Proportion of Intenders that have already *booked* their trip, Percentage Week 13, UK

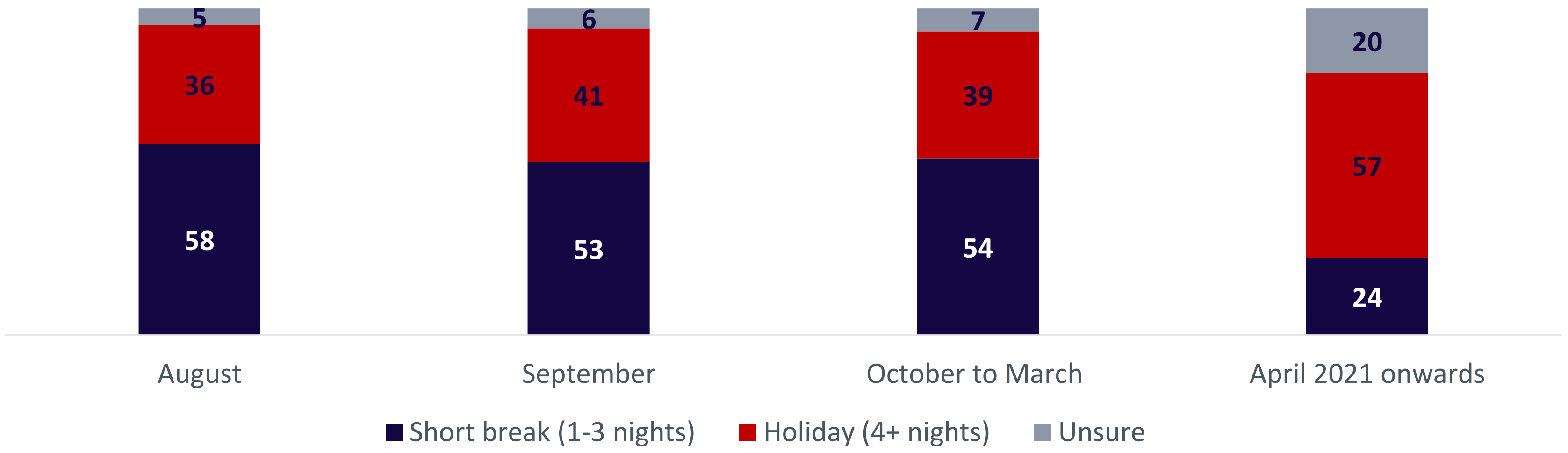


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All week 13 respondents planning on taking a holiday or short break in the UK by September n=298 and from October to March n=348

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

- Shorter breaks are more likely to be taken than holidays of 4+ nights for trips between now and next March. Holidays of 4+ nights remain preferred from April 2021 onwards.

Figure 23. Length of next UK holiday or short break by time period, Percentage Week 12, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 12 respondents intending to take next holiday in each time period August n=208, September n=132, October to March n=377; April onwards n=314

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

- The South West remains significantly more likely than any other part of the U.K. to receive short break and holiday visitors by September this year (22% intending to visit). This is followed by Scotland (13%) and the North West (12%).
- The South West of England, Scotland and London are the parts of the U.K. most likely have short break and holiday visitors during the winter period (between October and March)
- London more than doubles its share in winter compared to the summer.

Figure 24. Where planning on staying on next UK overnight trip by September, Percentage Weeks 11-13 merged data, UK

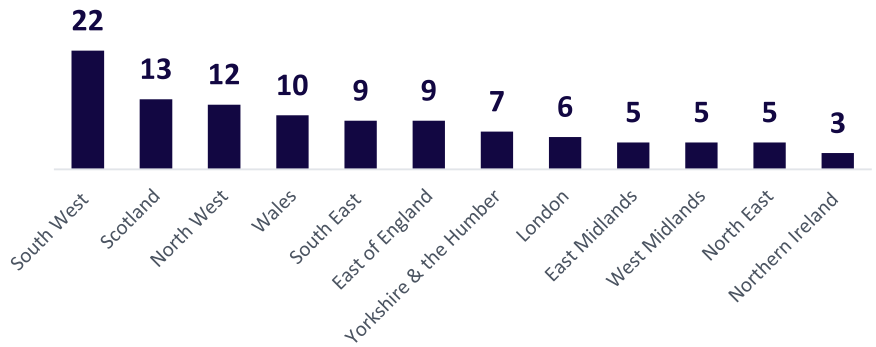
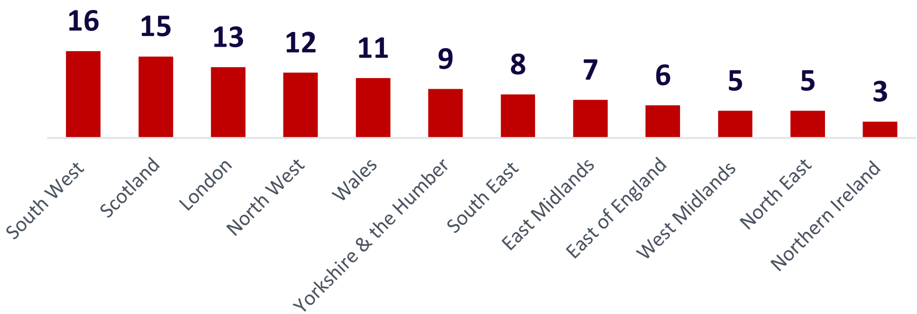


Figure 25. Where planning on staying on next UK overnight trip from October to March, Percentage Weeks 11-13 merged data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Week 11-13 respondents planning on taking a holiday or short break in the UK by September n=1,022 and from October to March n=1,094. 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 the leading mode of transport although significantly more so before October. Train is the second most preferred mode, followed by plane.

Figure 26. Top 5 main modes of travel to destination for trip by September, Percentage Week 13, UK

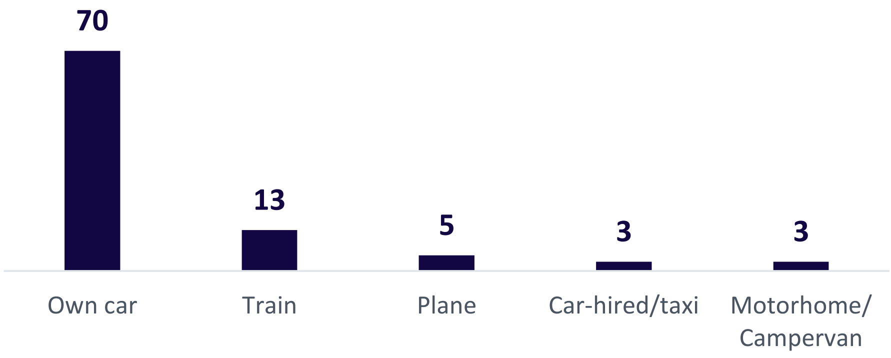
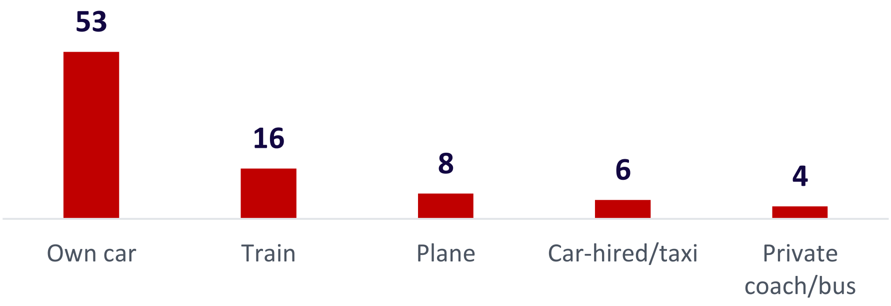


Figure 27. Top 5 main modes of travel to destination for trip from October to March, Percentage Week 13, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 13 respondents planning on taking a holiday or short break in the UK by September n=298 and from October to March n=348

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

- 'Countryside or village' (35%) remains ahead of 'traditional coastal/seaside town' (32%) as the main destination type for a trip by September. 'Rural coastline' and 'city or large town' (both 21%) are the next most preferred destination types although significantly less so
- Between October and March, 'city or large town' (33%) becomes the most preferred destination type, significantly more so than before October, and marginally ahead of 'countryside or village' (32%)

Figure 28. Main type of destination for trip by September, Percentage Weeks 11-13 merged data, UK

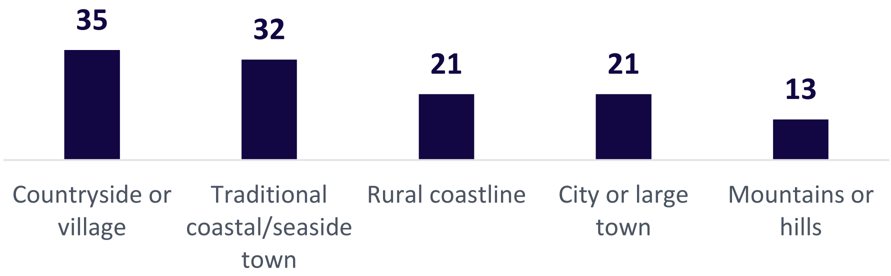


Figure 29. Main type of destination for trip from October to March, Percentage Weeks 11-13 merged data, UK

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 11-13 respondents planning on taking a holiday or short break in the UK by September n=1,022 and from October to March n=1,094. Three weeks of research merged to increase statistical reliability

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

- ‘Hotel/motel/inn’ is currently the preferred type of accommodation for trips between August and September *and* between October and March. However, in both time periods, the lead is narrow with other accommodation types generating similar interest – ‘caravan/camping’ and ‘private homes’ between August and September, and ‘private homes’ and ‘commercial rental’ between October and March.

Figure 30. Accommodation planning on staying in on next UK overnight trip by September, Net percentage Weeks 11-13 merged data, UK

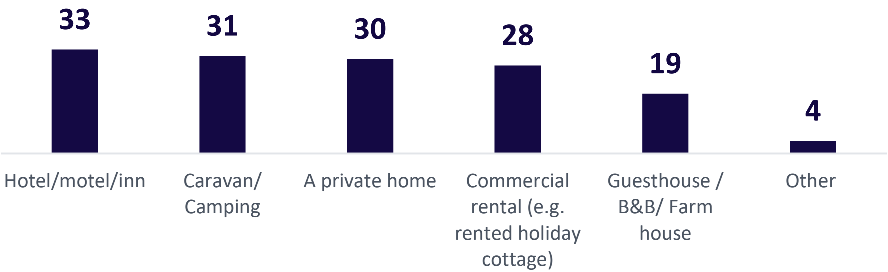
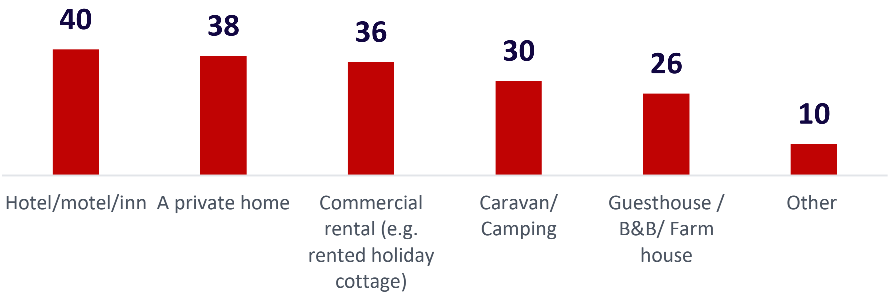


Figure 31. Accommodation planning on staying in on next UK overnight trip from October to March, Net percentage Weeks 11-13 merged data, UK

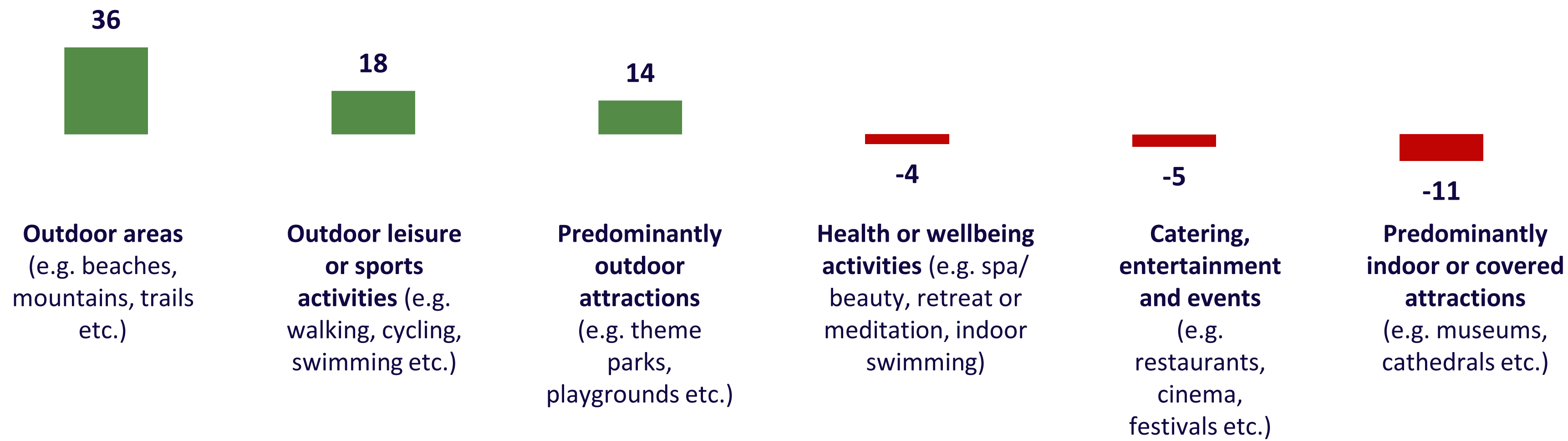


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Week 11-13 respondents planning on taking a holiday or short break in the UK by September n=1,022 and from October to March n=1,094.
Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +36), followed by outdoor leisure or sports activities (net +18) and outdoor visitor attractions (+14). Health or wellbeing activities (net -4), catering, entertainment and events (net -5), and indoor attractions (net -11) remain most likely to attract fewer visitors/engagement than normal.

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 13, UK

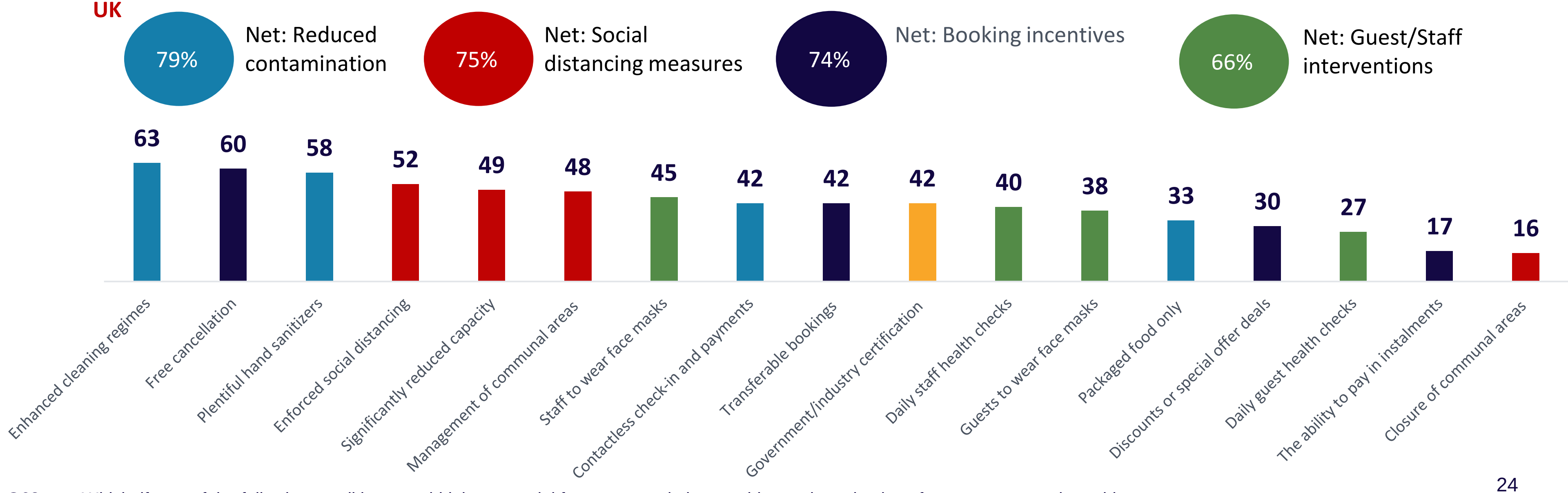


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All Week 13 respondents n=1,759

Conditions essential for people to stay in accommodation this summer

- Steps to reduce cross-contamination (79%), ensure social distancing (75%) and 'booking incentives' (74%) are the top three broad assurances the public need when planning a stay in accommodation this summer.
- Within these, 'enhanced cleaning regimes' (63%), 'free cancellation' (60%) and 'plentiful hand sanitisers' (58%) are the top three individual reasons.

Figure 33. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 13, 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 13 summer intenders n=298.

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 13 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-12 where appropriate. Week 13 fieldwork was conducted between 10th to 14th August 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.