COVID-19 Consumer Tracker

Wave 19

Fieldwork Period: 9 – 13 November

U.K. Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips 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 results are made publicly available and updated each wave at the following website:

  https://www.visitbritain.org/covid-19-consumer-sentiment-tracker

Definitions used within this report

In this report we look at the profiles and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip. For ease of reference, the time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions.

- **Early winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>November 2020 and December 2020</u>.
- **Late winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>January 2021 and March 2021</u>

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 13	10 – 14 August
Wave 2	25 – 29 May	Wave 14	31 August – 4 September
Wave 3	1 – 5 June	Wave 15	14 – 18 September
Wave 4	8 – 12 June	Wave 16	28 September – 2 October
Wave 5	15 – 19 June	Wave 17	12 – 16 October
Wave 6	22 – 26 June	Wave 18	26 – 30 October
Wave 7	29 June – 3 July	Wave 19	9 – 13 November
Wave 8	6 – 10 July	Wave 20	
Wave 9	13 – 17 July	Wave 21	
Wave 10	20 – 24 July	Wave 22	
Wave 11	27 – 31 July	Wave 23	
Wave 12	3 – 7 August	Wave 24	

Wave 19: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous wave**

Key Metrics	Wave 18	Wave 19	Wave Shift
National mood (average score out of 10)	6.4	6.6	+0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	5%	16%	+11*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.5	2.5	0
Normality score (proportion expecting normality by March)	17%	18%	+1
The main reasons for not feeling confident about taking a trip November to December (Top 2)	1. Restrictions on travel from government 2. Concerns about catching COVID-19	1. Restrictions on travel from government 2. It's not responsible to travel	New no.2

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 18	Wave 19	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	38%	35%	-3
Anticipated number of UK longer breaks compared to normal (% more/the same)	36%	33%	-3
Near-term confidence in taking UK overnight trip (Nov/Dec/Jan confident)	16%/16%/20%	11%/13%/15%	-3*/-3*/-5*
Medium-term confidence in taking UK overnight trip (Feb/March confident)	25%/34%	22%/34%	-3*/0
Proportion going on a UK overnight trip this early winter (Nov-Dec)	10%	6%	-4*
Split between longer break / short break / don't know for early winter trip	35%/60%/4%	35%/59%/6%	0/-1/+2

Wave 19: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

*** Represents a significant change on previous Wave**

Key Metrics	Wave 18	Wave 19	Wave Shift
Leading UK destination likely to stay in between Nov - Dec	South West	South East	New no.1
Main *type* of destination likely to stay in between Nov - Dec	Countryside or village	City or large town	New no. 1
Main accommodation type likely to stay in between Nov - Dec	Hotel/motel/inn	'Hotel/motel/inn' & 'A private home'	New joint no.1

Table 4. Top line Metrics – Broader Leisure Activity

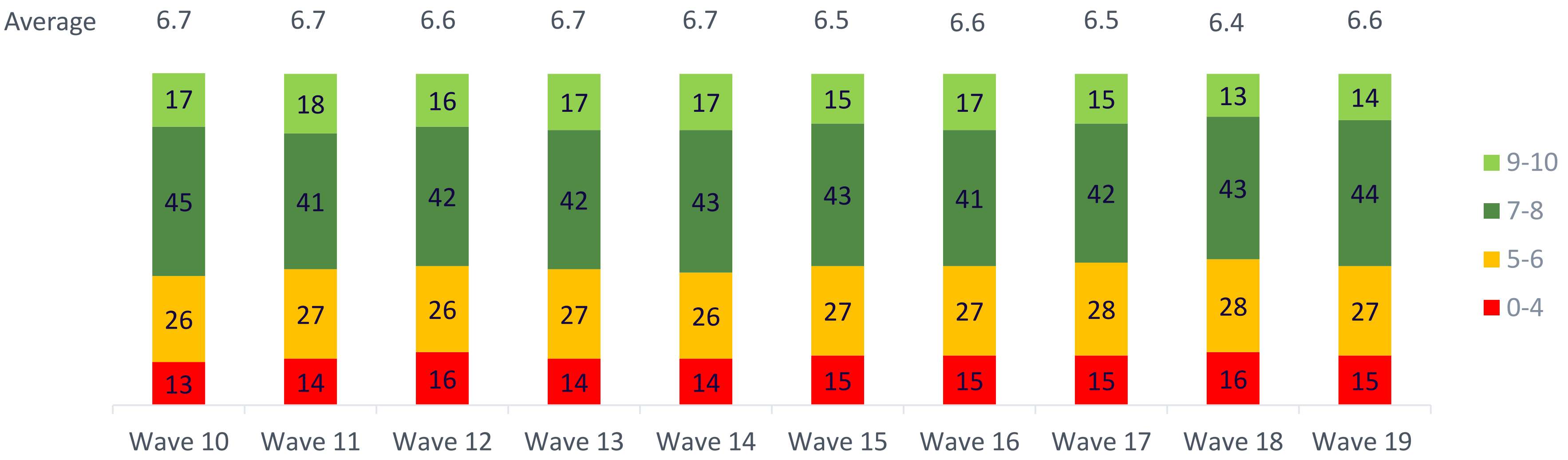
Key Metrics	Wave 18	Wave 19	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Indoor or covered attractions	Indoor or covered attractions	No change

1. The National Mood

The national mood

- The average mood of U.K. adults has increased to 6.6/10, realigning it with Wave 16 from late September.

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

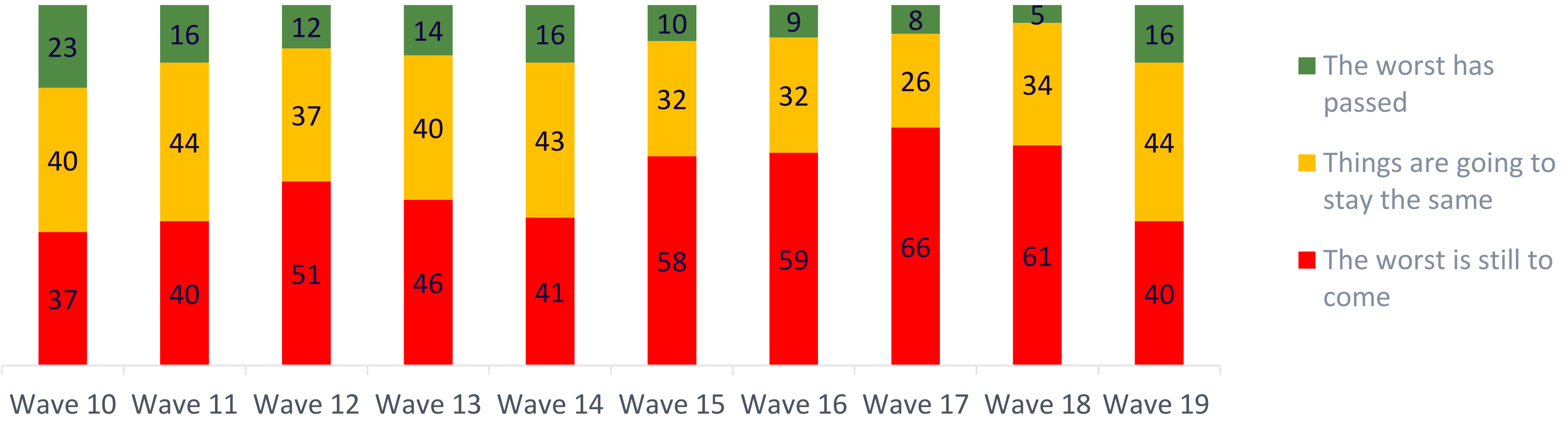


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 19 n=1,750

Perceptions of the situation in relation to COVID-19

- The proportion of U.K. adults stating 'the worst has passed' in relation to COVID-19 has significantly risen compared to the last wave (from 5% to 16%) and is the highest since Wave 14 (from early September).
- The percentage believing 'things are going to stay the same' has also increased, while a significantly lower proportion are of the opinion 'the worst is still to come' compared to last wave (falling from 61% to 40%).

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, 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. Wave 19 n=1,750

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

- There has been a very small increase in the proportion of U.K. adults expecting normality by next March (moving from 17% to 18%), arresting four consecutive waves of decline.
- However, the majority of U.K. adults (82%) don't expect normality before April, with half (50%) not expecting normality returning before next July.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Wave 19, UK

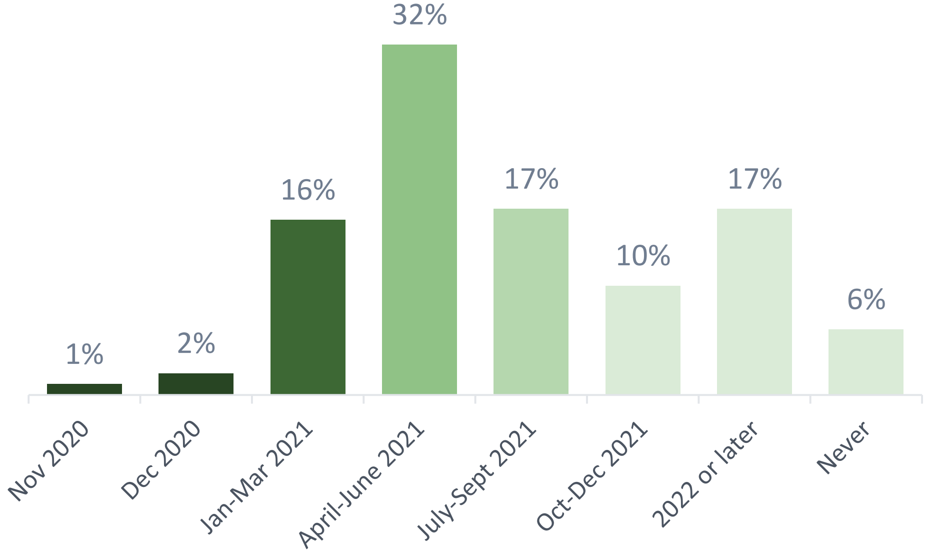
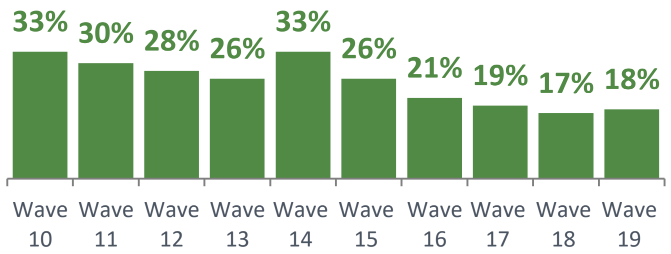


Figure 4. Proportion expecting normality by March, Percentage wave-on-wave, UK

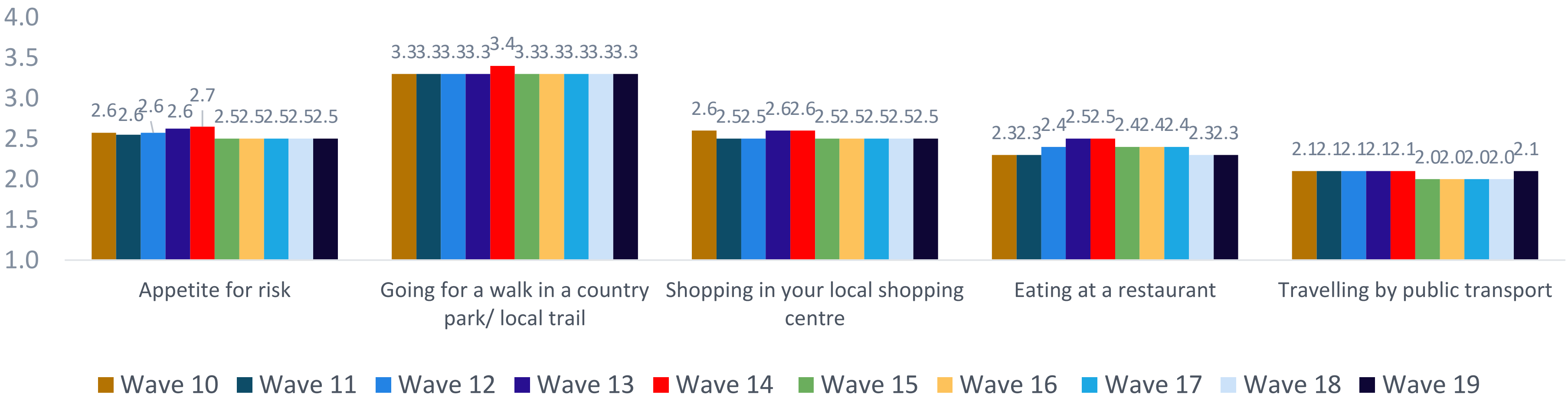


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 19 n=1,750

Appetite for risk

- The ‘levels of comfort’ with undertaking everyday activities has remained consistent since Wave 15, with the ‘appetite for risk’ average score holding steady at 2.5 out of 4
- Comfort with ‘travelling by public transport’ has experienced a slight increase this wave, rising marginally from 2.0 to 2.1

Figure 5. Level of comfort conducting a range of activities separately and combined, Average Score wave-on-wave 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. Wave 19 n=1,750.

2. Trip Intentions

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

- 35% of U.K. adults intend to take the same or more U.K. short breaks compared to normal between now and the end of the year. 37% plan on taking fewer short breaks, although a high degree of uncertainty is evidenced by the 28% who 'don't know'. The pattern is similar for 'longer breaks' of 4+ nights, although a lower proportion plan on taking 'more' of this type of trip.

Figure 13. Number of UK short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 19, UK

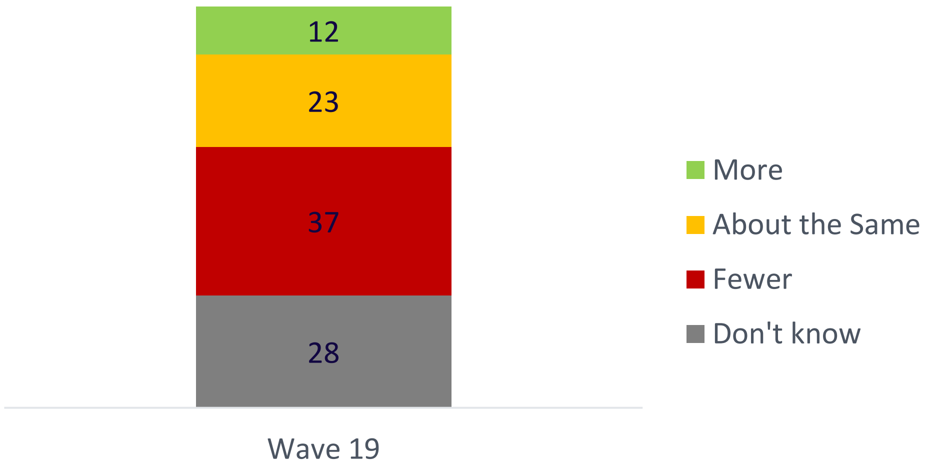
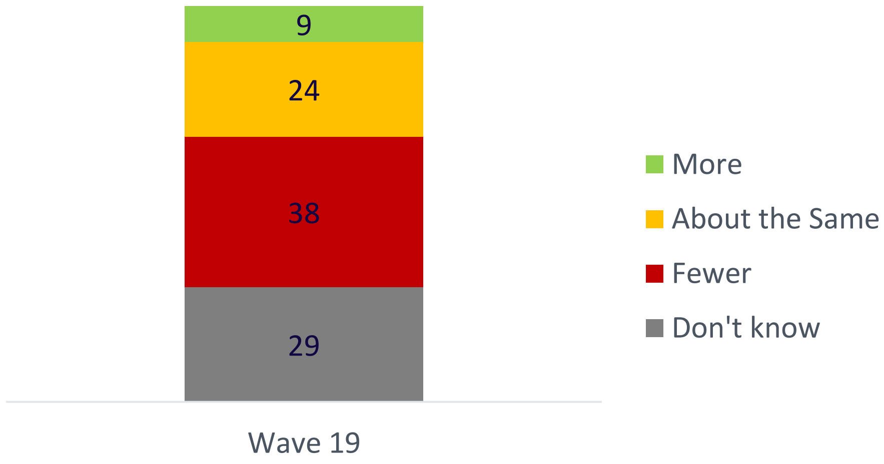


Figure 14. Number of UK longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 19, UK



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. Wave 19 n=1,750

Anticipated number of OVERSEAS trips this year compared to normal

- Around 1 in 4 (24%) of U.K. adults plan on taking more or about the same overseas short breaks compared to normal, between now and the end of March. A slightly higher proportion (27%) plan on taking more or about the same *longer* breaks to overseas destinations.
- The majority, however, either plan on taking fewer overseas trips, or 'don't know'.

Figure 15. Number of OVERSEAS short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 19, UK

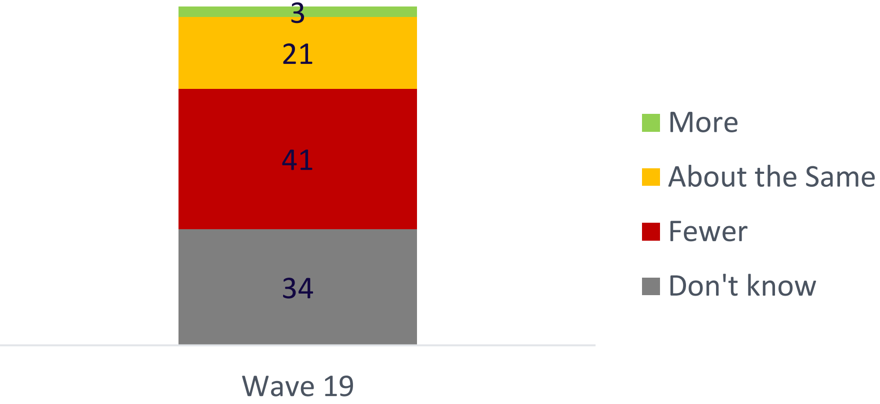
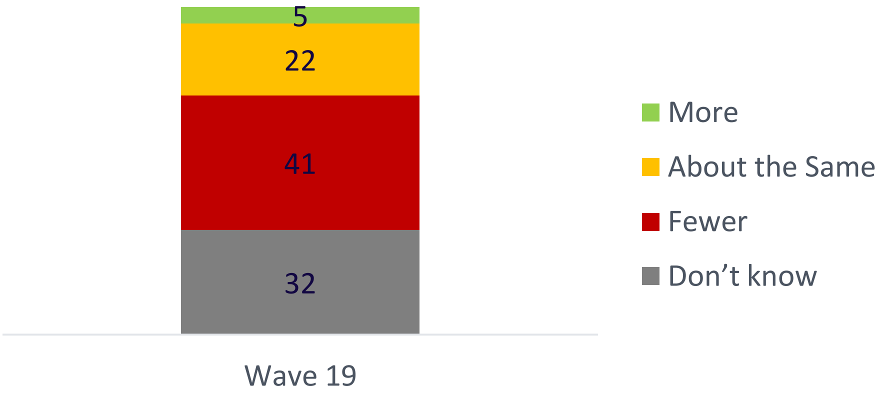


Figure 16. Number of OVERSEAS longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 19, UK



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. Wave 19 n=1,750

Confidence in the ability to take a U.K. overnight trip

- Near-term confidence (November to January) in being able to take a domestic overnight trip has declined since Wave 18
- Confidence remains subdued even up to March, although the declines when looking at this time horizon appear to have levelled out at 34%.
- It's not until we get to the April - June 2021 period that we see a majority (53%) of U.K. adults expressing confidence in the ability to take a trip, rising further through the summer and autumn months.

Figure 17. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 19, UK

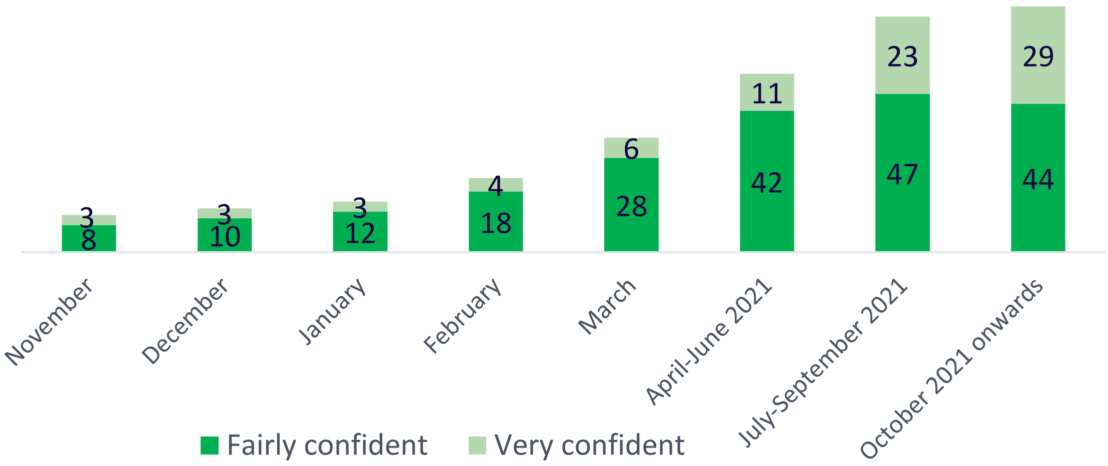
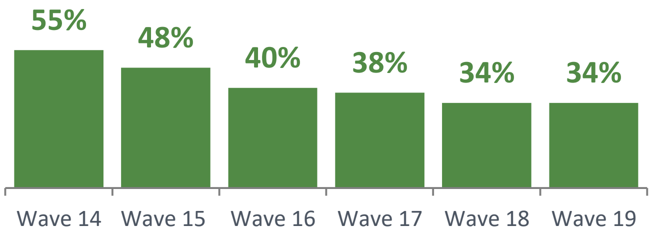


Figure 18. Confidence in taking a UK overnight trip in March 2021, Percentage wave-on-wave, UK



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. Wave 19 n=1,750.

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

- ‘Restrictions on travel from government’ is the leading reason U.K. adults do not feel confident about taking an overnight trip by a significant margin from the second most frequently cited reason
- As might be expected given the recent national lockdowns in Wales and England, a substantial proportion (47%) do not feel it’s ‘responsible to travel’ during the early winter period, with this reason getting more mentions than ‘concerns about catching Covid-19’.
- The other leading reasons focus on there being fewer things to do and restrictions on the opportunity to socialise.

Figure 19. Top 5 reasons for not being confident about travelling in early winter*, Percentage Wave 19, UK

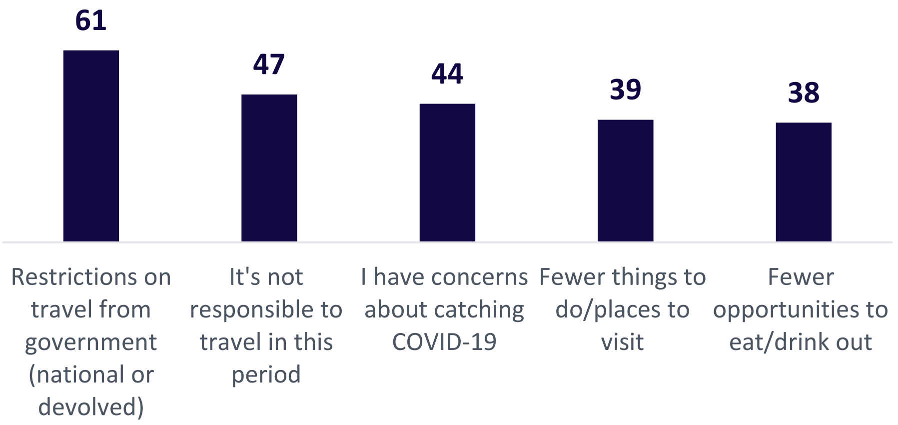
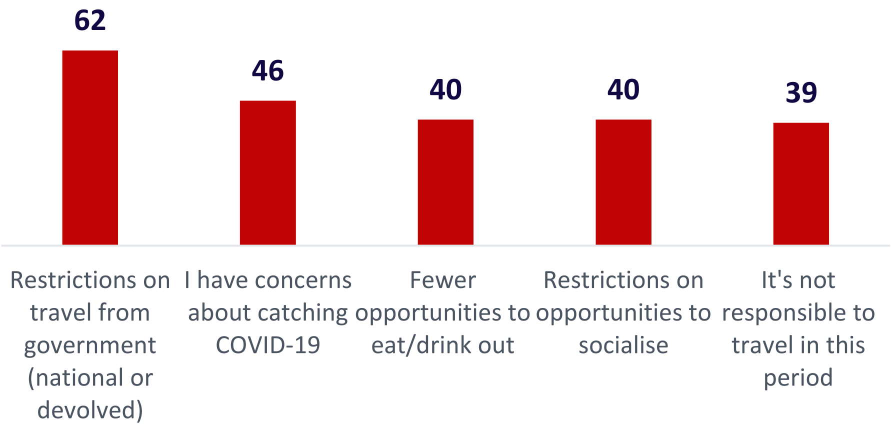


Figure 20. Top 5 reasons for not being confident about travelling in late winter*, Percentage Wave 19, UK



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: Wave 19 respondents not confident about taking a break in early winter n=419 and in late winter n=625. *Early is defined as Nov - Dec. Late Winter is defined as Jan - Mar 2021.

When anticipating to plan and book next U.K. overnight trip

- 10% claim to have already planned and 7% already *booked* their next domestic overnight trip, representing a decline from Wave 18 (from 14% and 10% respectively).
- A further 28% say they intend to plan and 25% intend to book their next trip this winter. A consistent 1 in 5 'don't know but would like to' plan or book an overnight U.K. trip while around 30% say they have no plans at this stage.

Figure 21. When anticipate PLANNING next UK overnight trip, Percentage Wave 19, UK

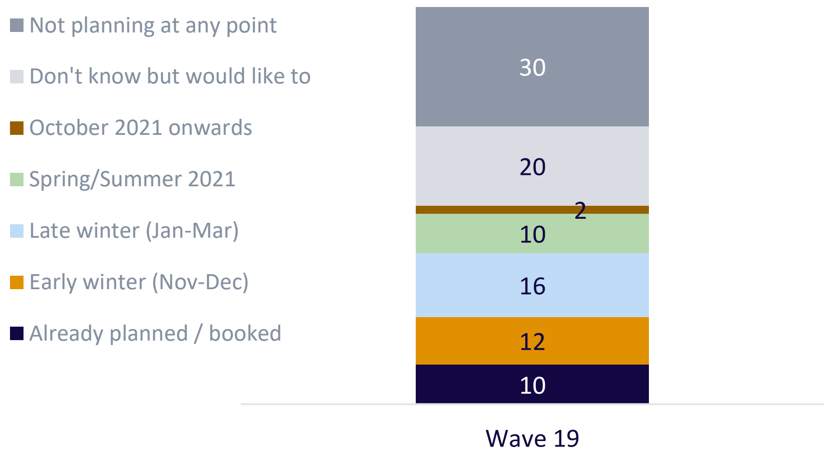
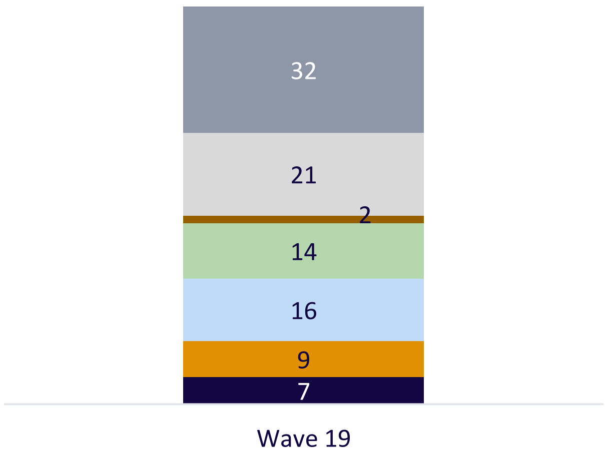


Figure 22. When anticipate BOOKING next UK overnight trip, Percentage Wave 19, UK

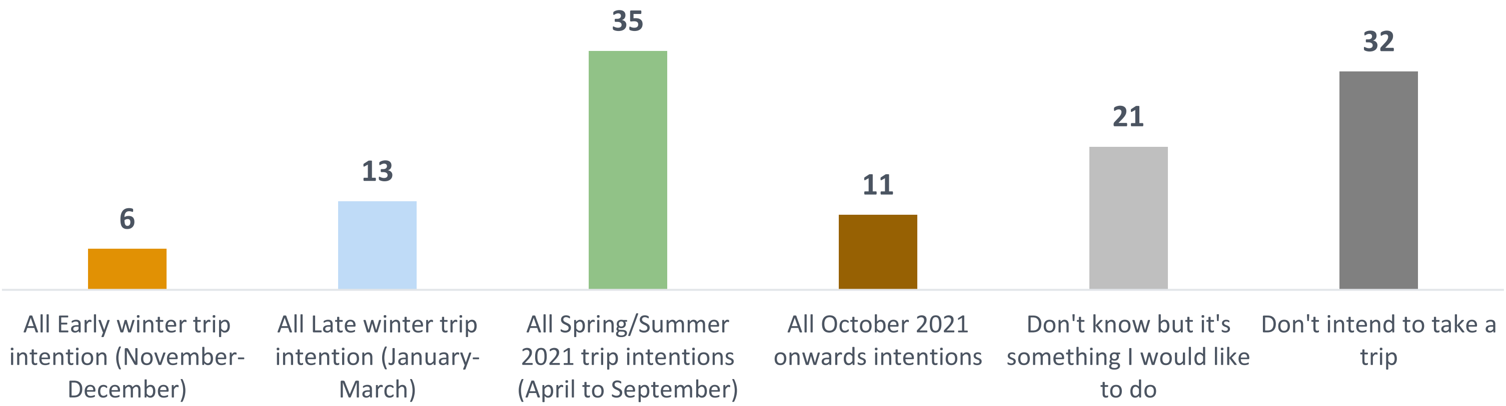


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 19 n=1,750. Early winter is defined as Nov - December. Late winter is defined as January - March 2021

When anticipating going on a U.K. overnight trip

- 6% of U.K. adults plan on taking a domestic overnight trip before the end of the year; a decline on the 10% that stated this in wave 18.
- 13% intend to take an overnight trip between January and March rising to over a third (35%) during the Spring or Summer of 2021, two figures that have increased since wave 18 (when it was 11% and 30% respectively).
- 32% of U.K. adults are not intending to take any domestic overnight trips at all, significantly lower than in wave 18, when 37% stated this.

Figure 23. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 19, 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? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. Wave 19 n=1,750

Proportion already planned or booked their next U.K. overnight trip

- 61% of U.K. early winter intenders (overnight trips between now and the end of the year) have yet to enter the planning stage and 78% yet to book.
- A minority of late winter intenders (overnight trips between January – March 2021) have planned or booked their trips; at 22% and 18% respectively.

Figure 24. Proportion of Intenders that have already *planned* their trip, Percentage Wave 19, UK

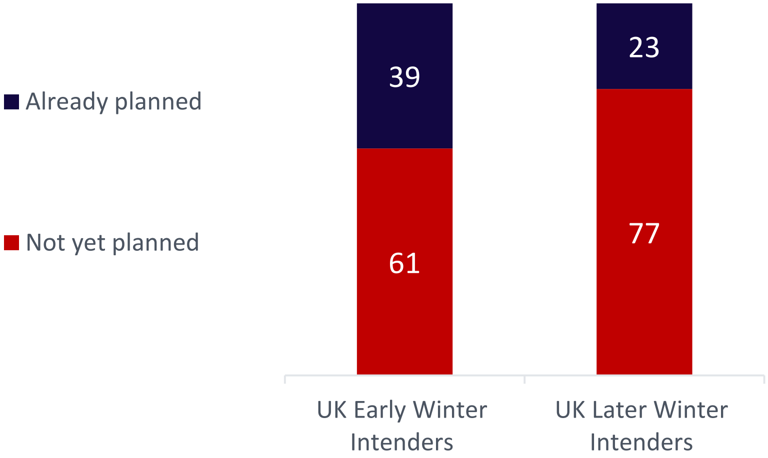
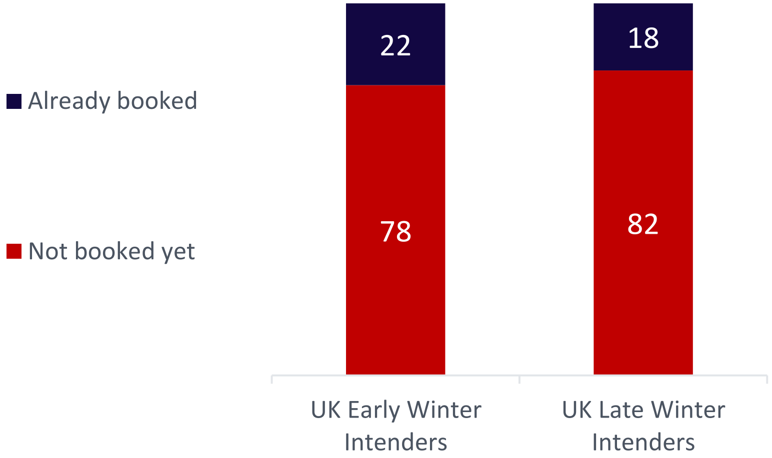


Figure 25. Proportion of Intenders that have already *booked* their trip, Percentage Wave 19, UK

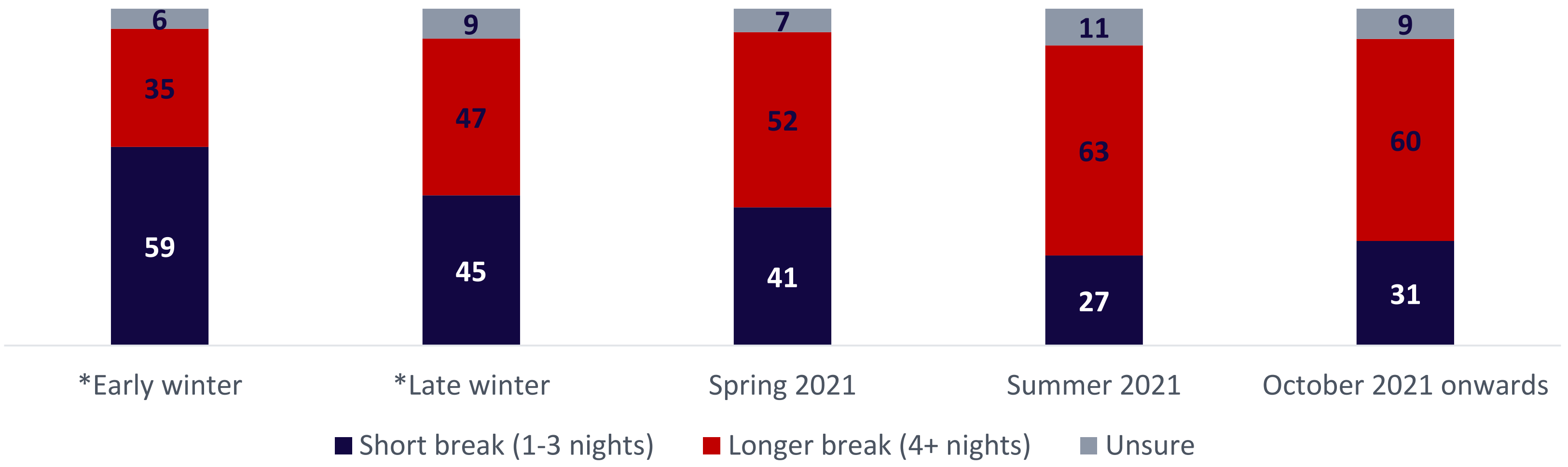


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 19 respondents planning on taking a holiday or short break in the UK in early winter (November-December) n=99 and in late winter (January-March) n=184

Length of next overnight U.K. trip, by time period

- Shorter breaks of 1-3 nights look set to account for a higher volume than longer trips of 4+ nights during the early winter period, although the proportions are more even for late winter.
- From Spring 2021 onwards, longer breaks make up the majority of overnight trips.

Figure 26. Length of next UK holiday or short break by time period, Percentage Wave 19, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 19 respondents intending to take next holiday in each time period: Early winter n=99; Late winter n=184; Spring 2021 n=246; Summer 2021 n=188; October 2021 onwards n= 93. *Early is defined as November - December. Late winter is defined as January - March 2021

Where planning on staying on next U.K. overnight trip

- The South East is currently the lead destination for an overnight stay in the early winter period with 14% share, although there is minimal separation with Yorkshire and the Humber (13%), London (12%) and the South West (also 12%).
- The South West and London are the two leading destinations for late winter trips, although again we see relatively even shares among the top 5 locations.

Figure 27. Where planning on staying on next UK overnight trip in early winter, Percentage Waves 18-19, UK

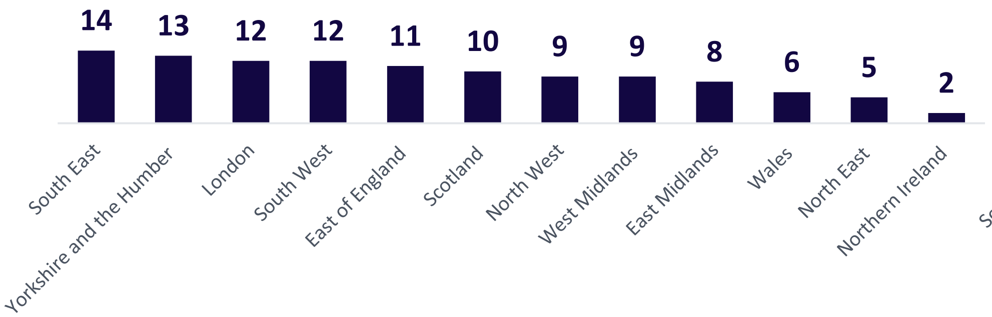
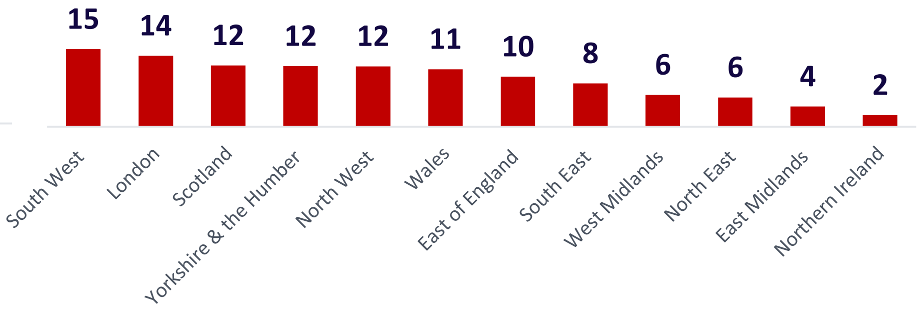


Figure 28. Where planning on staying on next UK overnight trip in late winter, Percentage Waves 18-19, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 18-19 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=191 and for late winter (January-March) n=304.

Main mode of transport for next U.K. overnight trip

Main mode of transport for next U.K. overnight trip

- Across both time periods, ‘own car’ is the leading mode of transport for travelling to a destination, with 56% anticipating this in early winter and virtually the same proportion for trips destined to happen during the late winter period.
- Travel by ‘train’ is the second most preferred mode for both early and late winter trips.

Figure 29. Top 5 main modes of travel to destination for trip in early winter, Percentage, Wave 19, UK

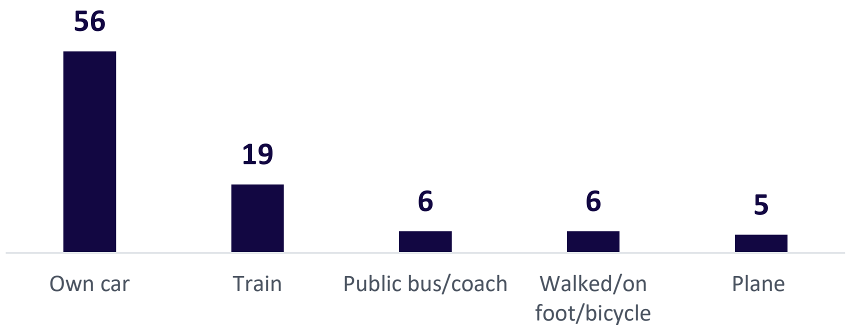
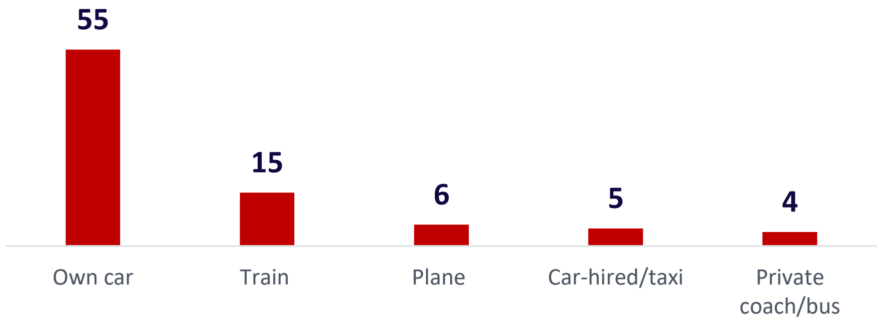


Figure 30. Top 5 main modes of travel to destination for trip in late winter, Percentage, Wave 19, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 19 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=99 and from late winter (January-March) n=184

Type of destination for next U.K. overnight trip

- The leading destination type for a trip in early winter is 'city or large town' (33%), just ahead of 'countryside or village' (31%).
- 'City or large town' leads again for late winter (31%), followed closely by 'traditional coastal/seaside town' (30%) and 'countryside or village' (30%). It's worth noting that late winter trips to 'traditional coastal/seaside towns' are most likely to take place in March.

Figure 31. Main type of destination for trip in early winter, Percentage Waves 18-19, UK

Figure 32. Main type of destination for trip in late winter, Percentage Waves 18-19, 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 Wave 18-19 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=191 and for late winter (January-March) n=304.

Type of accommodation for next U.K. overnight trip

- ‘Hotel/motel/inn’ and ‘private home’ represent the leading accommodation choices in early winter.
- For late winter trips, ‘hotel/motel/inn’ (42%), ‘private home’ (39%) and ‘commercial rental’ (also 39%) have the lead shares.
- It’s worth commenting that both early and late winter trip-takers are considering more than one option on average, suggesting some degree of uncertainty prevails regarding these planned overnight breaks.

Figure 33. Accommodation planning on staying in on next UK overnight trip in early winter, Net percentage Waves 18-19

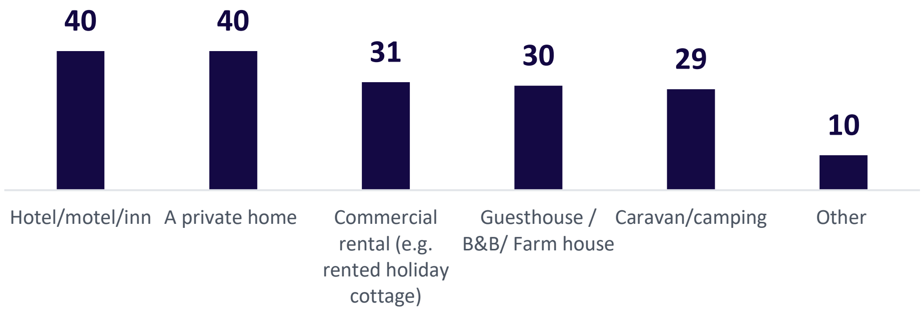
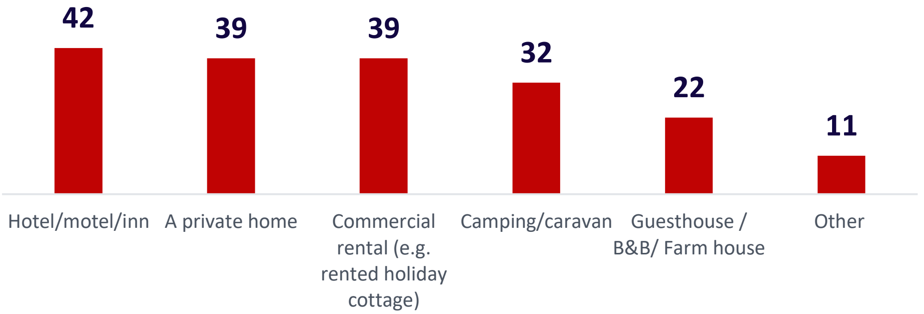


Figure 34. Accommodation planning on staying in on next UK overnight trip in late winter, Net percentage Waves 18-19

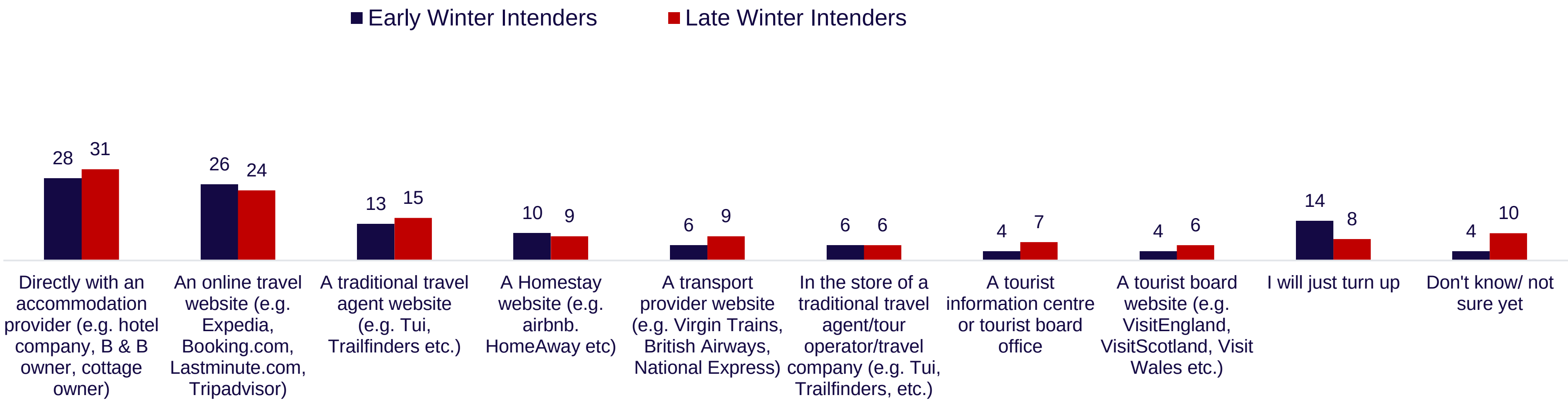


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 18-19 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=191 and for late winter (January-March) n=304.

Method of booking accommodation for next U.K. overnight trip

- Both 'early winter intenders' and 'late winter intenders' are most likely to book their accommodation directly with an accommodation provider (around 1 in 3 intend to use this channel) followed by an online travel website (about 1 in 4).

Figure 35. Accommodation booking channel for next trip in early winter and late winter, Percentage Wave 19, U.K.

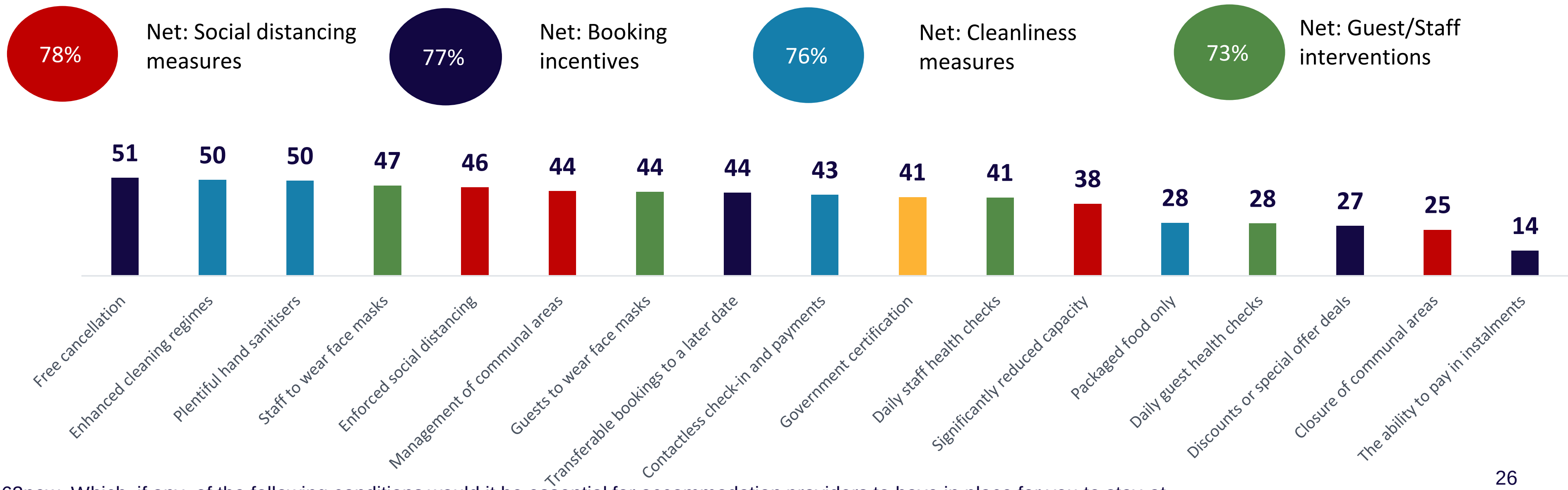


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 19 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=99 and for late winter (January-March) n=184

Conditions essential to stay in accommodation in next few months

- At a net level, there is little to separate ‘social distancing measures’, ‘booking incentives’, ‘cleanliness measures’ and ‘guest/staff interventions’. The single most important condition remains ‘free cancellations’ (51%) very closely followed by ‘enhanced cleaning regimes’ and ‘plentiful hand sanitisers’.

Figure 36. Conditions that are essential for a stay in accommodation, Percentage and Net Percentages Wave 19, UK

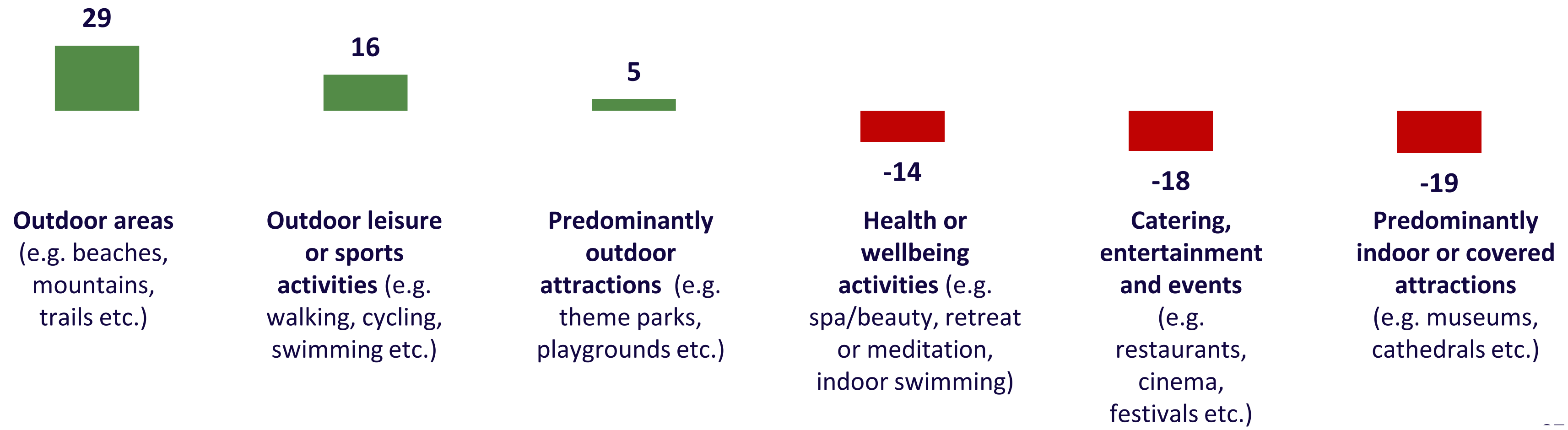


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All early and late winter Intenders n=271

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal, followed by outdoor leisure or sports activities (net +14) and predominantly outdoor attractions (+5)
- 'Predominantly indoor attractions' (net -19) and 'catering, entertainment and events' (-18) remain behind 'health or wellbeing activities' (net -14) in being likely to attract fewer visitors/engagement than normal.

Figure 37. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Wave 19, 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 Wave 19 respondents n=1,750

Methodology

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the U.K. adult population.
- 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 Wave 19 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-18 where appropriate. Wave 19 fieldwork was conducted between 9th and 13th November 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.