VisitBritain VisitEngland

COVID-19 Consumer Weekly Tracker

Week 1

1st June 2020

U.K. Results

Introduction

- VisitBritain has commissioned a weekly tracking survey to understand domestic intent to take 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 will address: 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.
- The COVID-19 consumer sentiment tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+. The survey will be repeated across a 13 week period with the first wave published on 1 June 2020.
- The results will be made publicly available and updated each week at the following website:

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

Week 1: Scorecard of Key Metrics

Table 1. Top line Metrics

		Week 1
General sentiment scores	National mood (average score out of 10)	6.7
	Perceptions of the situation regarding Covid-19 (proportion stating 'worst has passed')	24%
	Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.2
	Normality score (proportion expecting normality by August)	15%
	The main reason for not feeling confident about taking a trip between June-August	Gov't guidance on travel restrictions
General short break and holiday intentions	Anticipated number of U.K. short breaks compared to normal (% more minus fewer)	-28
	Anticipated number of U.K. holidays compared to normal (% more minus fewer)	-31
	UK near-term holiday/short break confidence (June-August very/fairly confident)	13%
	UK medium-term holiday/short break confidence (Sept-Dec very/fairly confident)	36%
	UK long-term holiday/short break confidence (Jan 2021 onwards very/fairly confident)	59%
	Proportion going on a short break *or* holiday between June and September	19%
	Split between holiday / short break for next trip between June and September	46%/48%
Specific short break and holiday plans	Leading U.K. destination likely to stay in between June and September (Top 1)	South West England
	Main *type* of destination likely to stay in between June and September (Top 1)	Countryside or Village
	Main accommodation type likely to stay in between June and September (Top 1)	Serviced accommodation (e.g. hotel/B&B)
Broader leisure activity	Place/activity generating highest engagement compared to normal	Outdoor areas
	Place/activity generating lowest engagement compared to normal	Indoor health/wellbeing activities

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

- 17% of Britons described their mood as 9 or 10 out of 10
- Three quarters of respondents indicated they feel things are going to stay the same or the worst is still to come in relation to the COVID-19 situation

Figure 1. Current mood out of 10, Percentage, UK

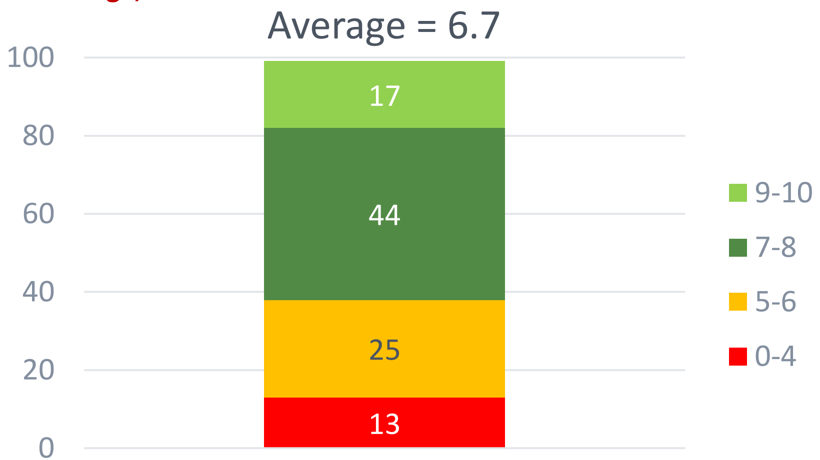
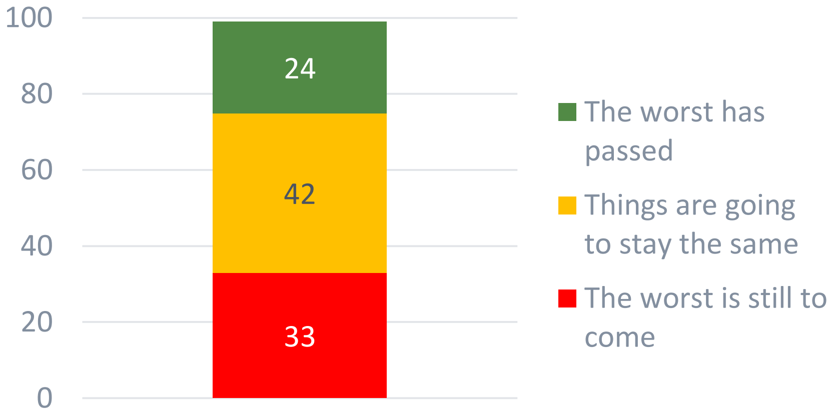


Figure 2. Perception of the situation with regards to COVID-19, Percentage, UK



Q5: How would you rate, between 0 and 10, your mood today? 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 n=1,753

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

- 15% believe that life will return to 'something close to normal' by August, rising to 54% by the end of the year

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

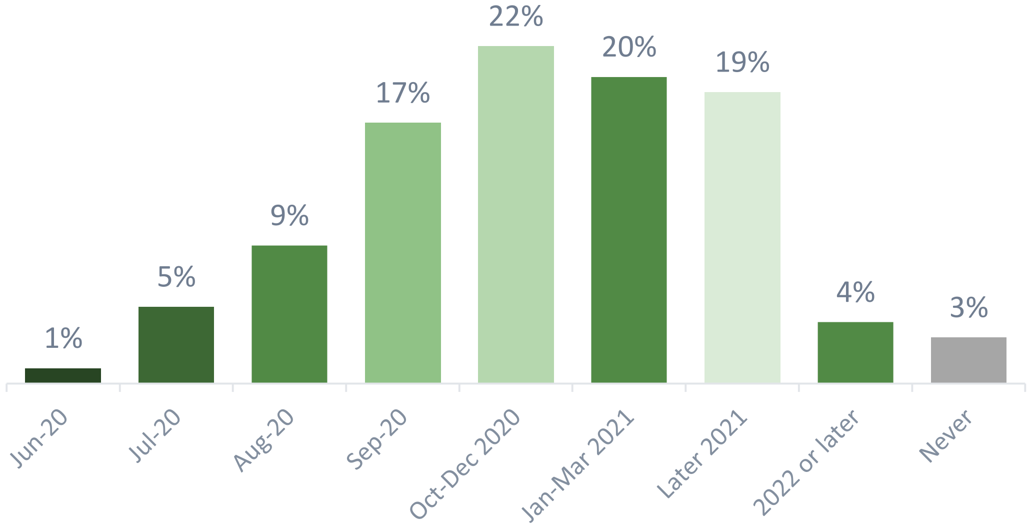


Figure 4. Proportion expecting normality by August, Percentage, UK

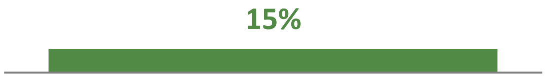
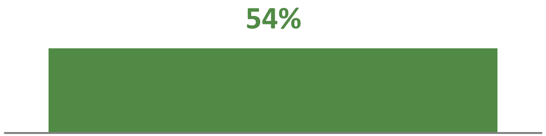


Figure 5. Proportion expecting normality by December, Percentage, UK



Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents n=1,753

Appetite for Risk

- The ‘appetite for risk’ score stands at 2.2 out of 4, with 4 representing ‘absolute comfort’
- Comfort is highest for walks outdoors in a country park/trail (3.0), while people exhibit lowest levels for eating at a restaurant or using public transport (both 1.8)

Figure 6. Comfort in conducting a range of activities separately and combined, Average Score 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 n=1,753. Mean average based on those that gave a score of 1-4. ‘Net: Risk average score’ is calculated as a straight average of the four scores

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

- Compared to normal, the public anticipate taking fewer short breaks (net -28) and holidays (net -31) in the UK between now and year end.

Figure 7. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage, UK

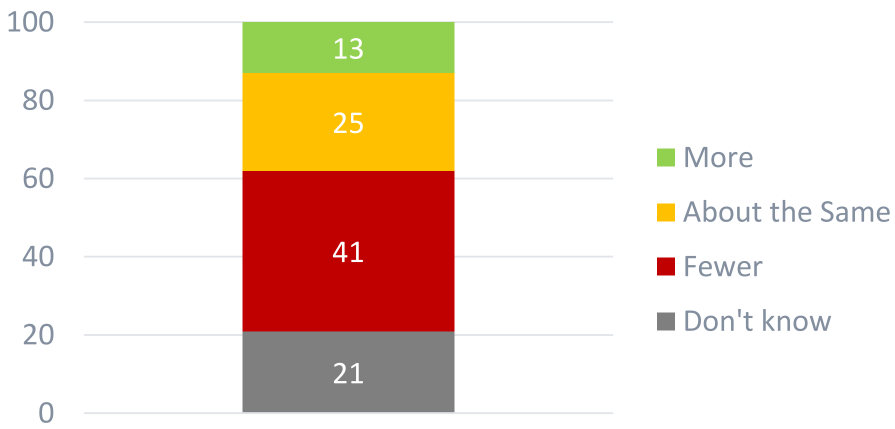
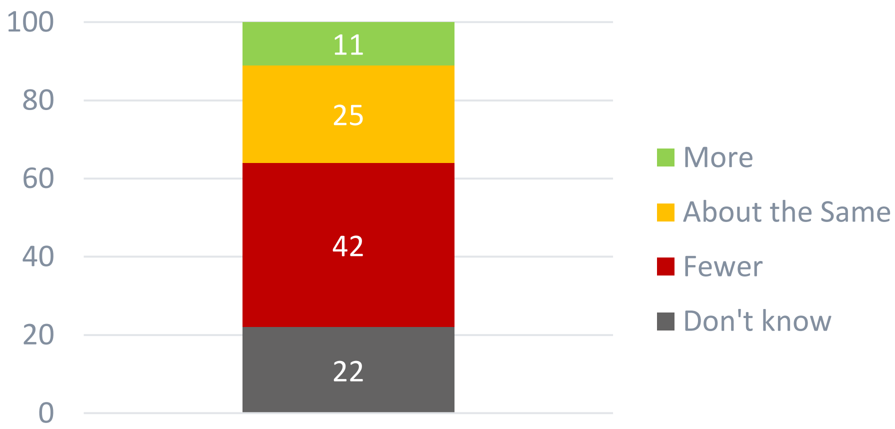


Figure 8. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage, UK



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 n=1,753

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults also anticipate taking fewer overseas short breaks (-43) and holidays (-41) by the end of the year compared to normal

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

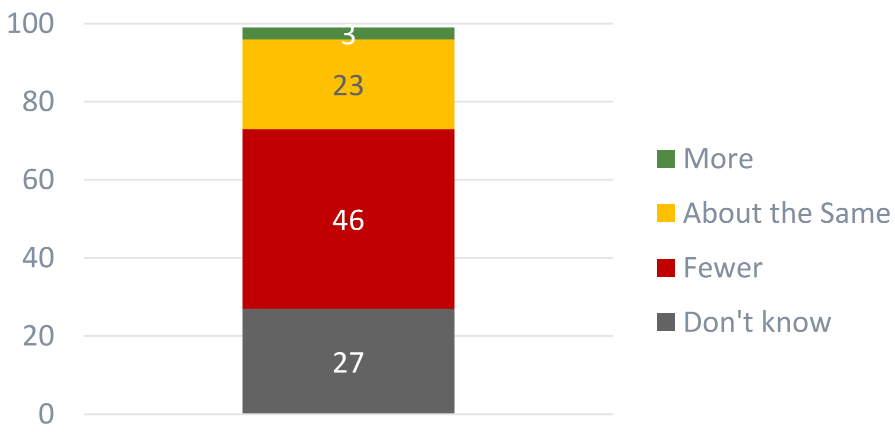
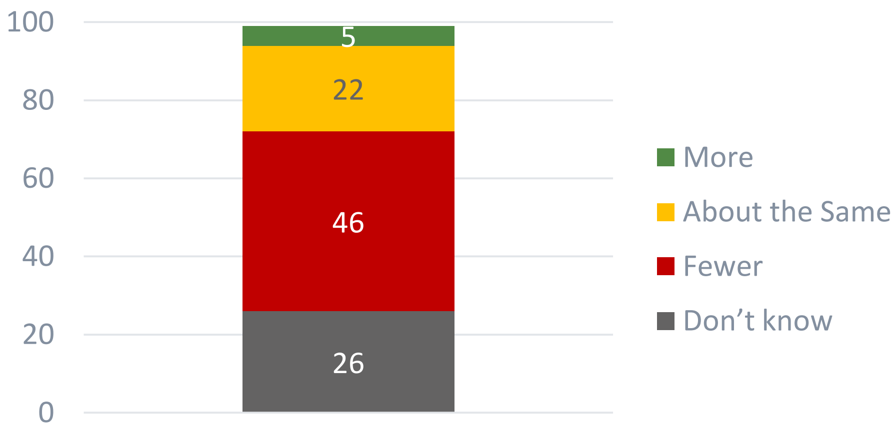


Figure 10. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage, UK



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 n=1,753

When anticipating to plan, book or go on next U.K. short break or holiday

- 36% have either already planned or intend to plan a U.K. short break or holiday by September (while for booking it's 34%)
- 19% anticipate actually *going* on their next U.K. short break or holiday by this September

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

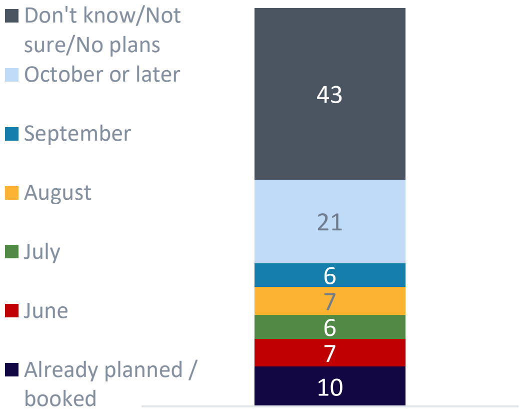


Figure 12. When anticipate BOOKING next UK holiday or short break, Percentage, UK

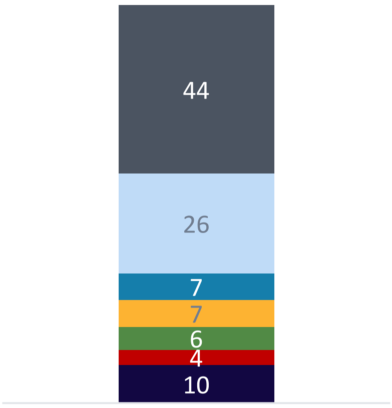
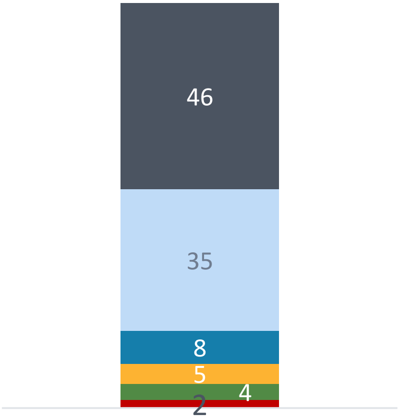


Figure 13. When anticipate GOING on next UK trip, Percentage, UK

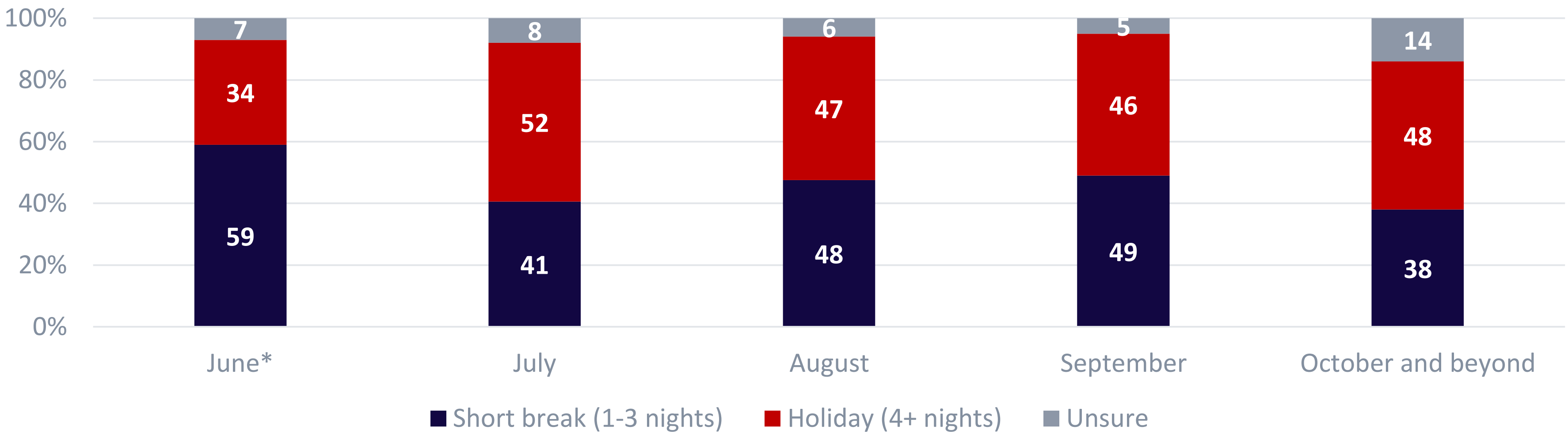


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents n=1,753

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

- With the exception of June (where base sizes are low), the percentage split between short breaks and holidays during the peak summer season is quite consistent.

Figure 14. Length of next UK holiday or short break by time period, Percentage, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents intending to take next holiday in each time period June n=30*, July n=68, August n=92, September n=139, October and beyond n=611
*Indicates small base size. Please treat with caution.

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

- The South West, Scotland and the South East are the three regions of the U.K. likely to attract the highest proportion of domestic holiday-makers between June and September
- From October onwards, the South West, Scotland and London are three areas that index the highest

Figure 15. Where planning on staying on next UK overnight trip in June to September, Percentage, Top 10, UK

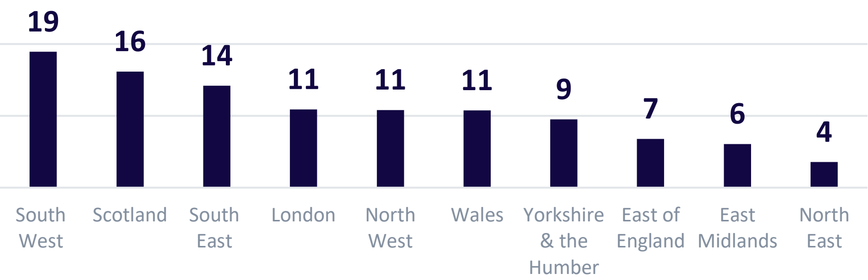
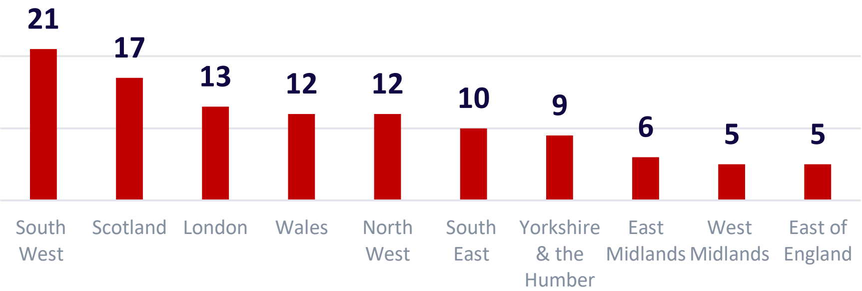


Figure 16. Where planning on staying on next UK overnight trip from October onwards, Percentage, Top 10, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK between June and September n=940 and from October onwards n=611

Main mode of transport for next U.K. short break or holiday

- Across both review periods, ‘own car’ is by far the predominant form of transport.
- This is followed by ‘train’, while ‘plane’ leads the sub-10% modes of transport.

Figure 17. Top 5 main modes of travel of destination for trip in June to September, Percentage, UK

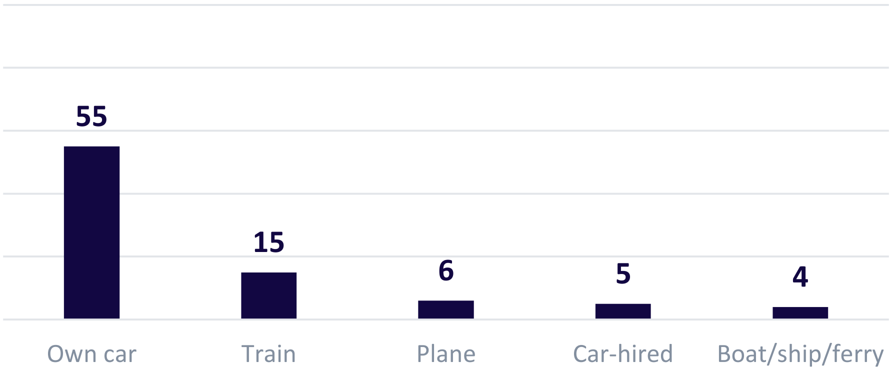
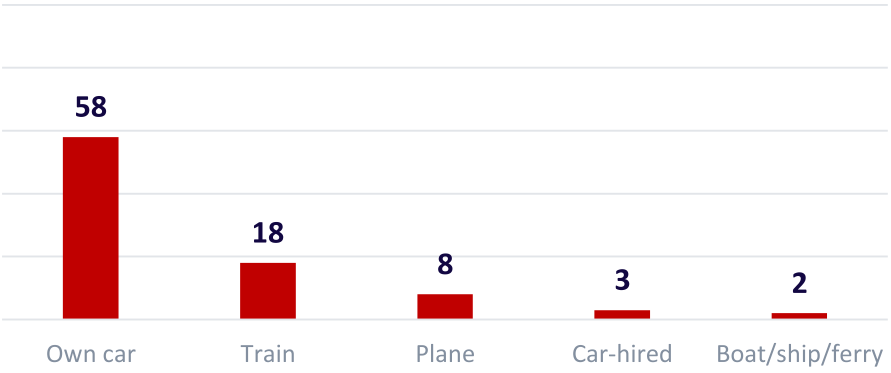


Figure 18. Top 5 main modes of travel of destination for trip from October onwards, Percentage, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All respondents planning on taking a holiday or short break in the UK between June and September n=940 and from October onwards n=611

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

- Countryside or village, traditional coastal/seaside town and city or large town are the three leading destination types for a U.K. short break or holiday between June - September
- The pattern is broadly similar from October onwards, although city or large town does receive slightly higher levels of intent.

Figure 19. Main type of destination for trip in June to September, Percentage, UK

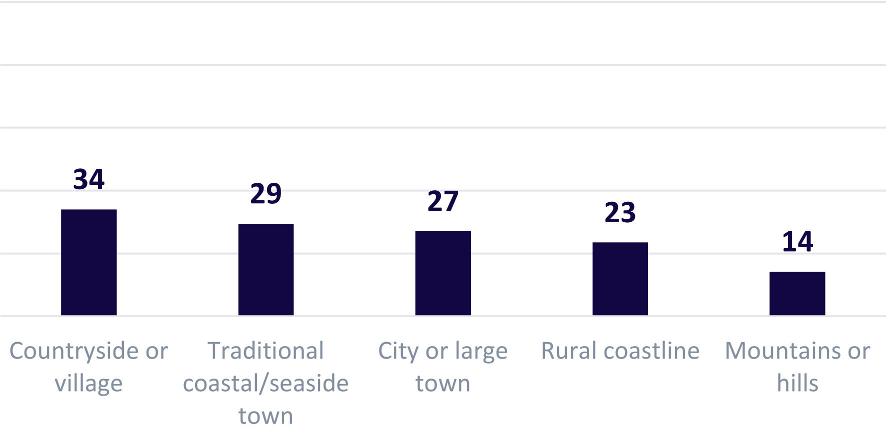
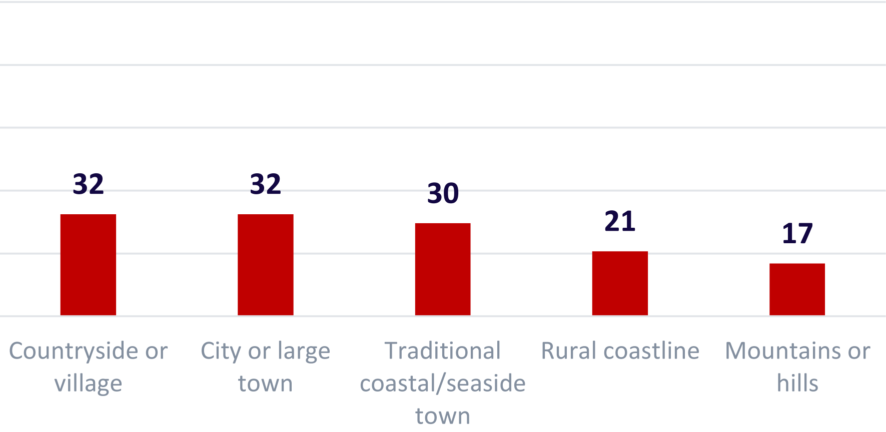


Figure 20. Main type of destination for trip from October onwards, Percentage, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK between June and September n=940 and from October onwards n=611

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

- Serviced accommodation (e.g. hotels and B&Bs) and caravan/camping are the two types of accommodation U.K. holiday-makers are most likely to stay in between June and September
- Service accommodation indexes significantly higher for trips from October onwards, with caravan/camping significantly lower

Figure 21. Accommodation planning on staying in on next UK overnight trip in June to September, Net percentage, UK

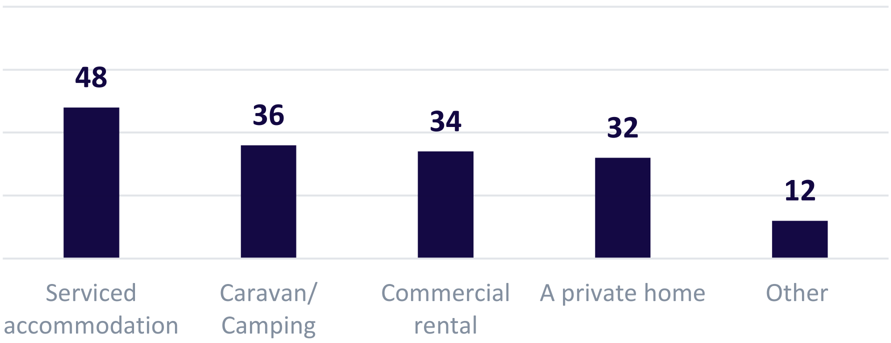
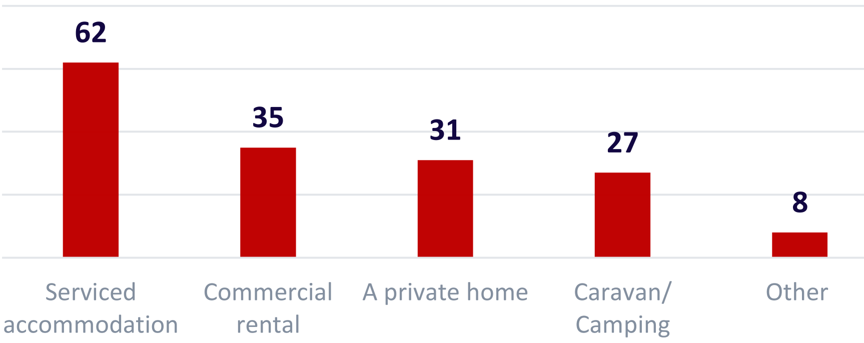


Figure 22. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage, UK



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in the UK between June and September n=940 and from October onwards n=611

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

- 9% of U.K. adults feel confident going on domestic holiday or short break in June this year, rising to 17% in July to August, 31% in September to October, and 40% in November to December. 59% would feel confident taking a trip from January 2021 onwards

Figure 23. Confidence in taking a UK short break or holiday across a range of different months, Percentage, UK

QVB7a. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on a UK short break or holiday in the following months? Base: All respondents n=1,753

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

- ‘Restrictions on travel imposed by government’ is the leading reason cited for lack of confidence in taking trips in the U.K. between June and August. It is also a factor from September onwards but is second to ‘concerns about catching COVID-19’

Figure 24. Top 5 reasons for not being confident about travelling between June to August , Percentage, UK

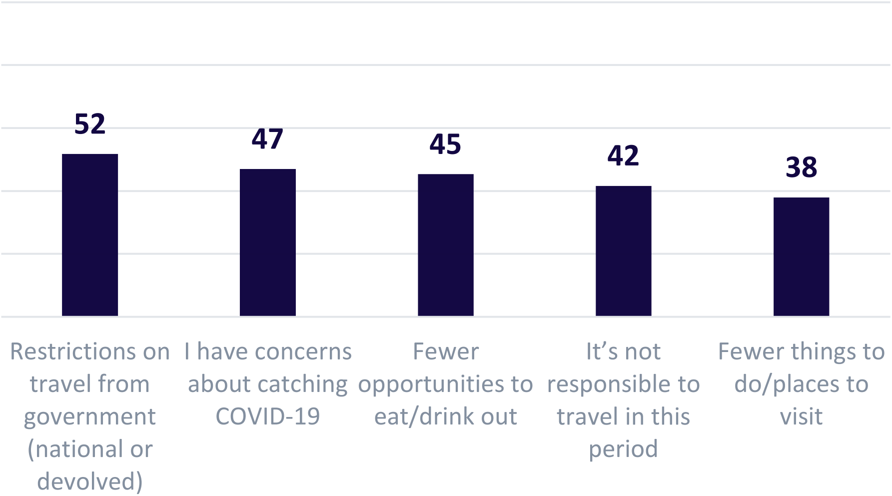
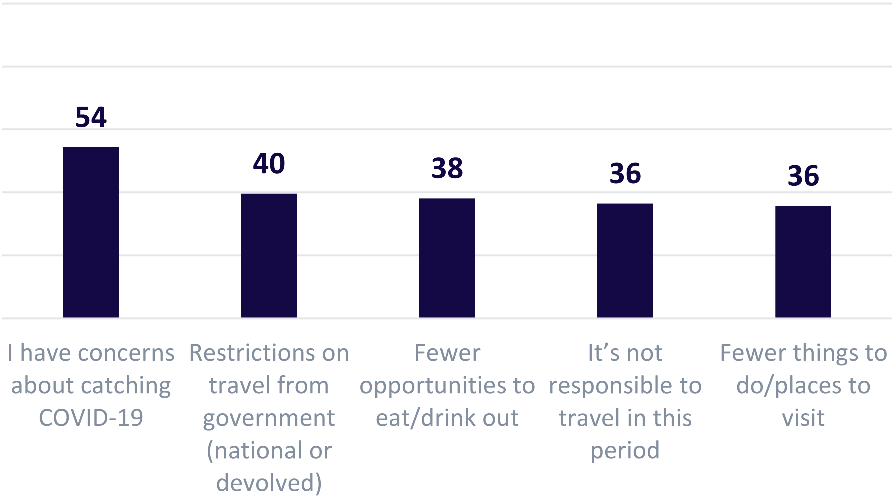


Figure 25. Top 5 reasons for not being confident about travelling from September onwards, Percentage, UK

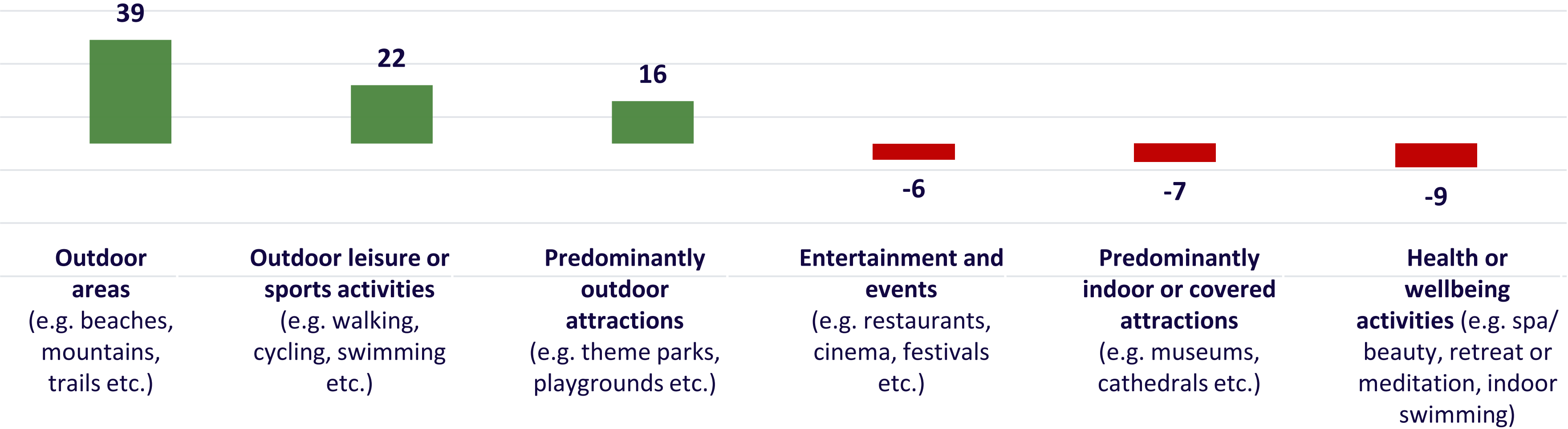


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Respondents not confident about taking a break between June and August n=545 and from September onwards n=543

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal, followed by outdoor leisure or sports activities and outdoor attractions. Entertainment and events, indoor attractions and health or wellbeing facilities are likely to attract fewer visitors/engagement than normal.

Figure 26. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely', UK

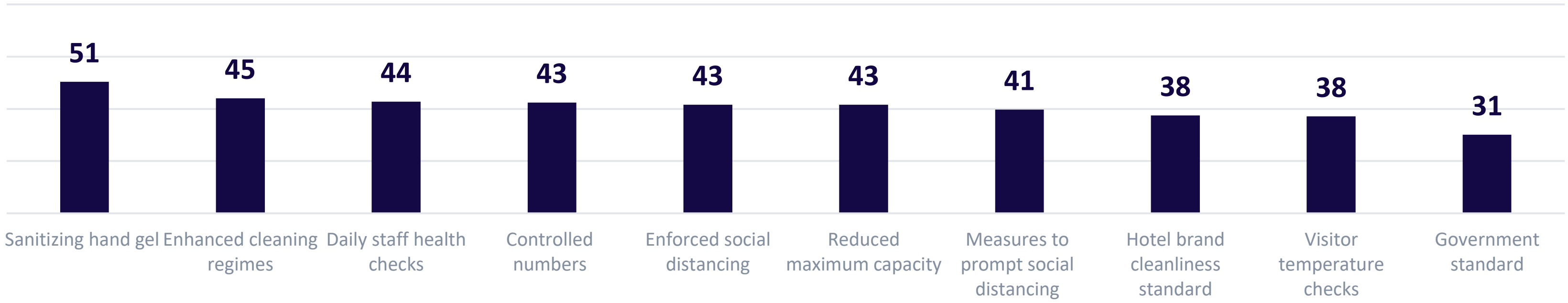


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents n=1,753

Reassurance needed for people staying in a hotel post-lockdown

- Access to sanitizing hand gels is the leading requirement, followed by a list of requirements with similar levels of sentiment, such as enhanced cleaning regimes, daily staff health checks and controls being placed on guest numbers.

Figure 27. Top 10 conditions that would need to be met to feel comfortable staying at a hotel after the lockdown has been lifted, Percentage, UK



Q63. Which, if any, of these conditions would need to be met before you personally would consider staying at a hotel after the lockdown has been lifted?
Base: All hotel stayers n-116

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 it representative of the U.K. overall and within each nation.
- This report presents findings from Week 1 of the COVID-19 consumer weekly tracker. Week 1 fieldwork was conducted between 18th May and 22nd May 2020.

Master Data Tables

- To access the Master Data Tables, please open the report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.