COVID-19 Consumer Weekly Tracker

Week 3

Fieldwork Period: 1-5 June

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

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Week 3: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 2	Week 3	Weekly Shift
National mood (average score out of 10)	6.7	6.6	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	29%	27%	-2
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.25	2.33	+0.08
Normality score (proportion expecting normality by September)	30%	29%	-1
The main reasons for not feeling confident about taking a trip between June-August (Top 2)	1. Gov't guidance on travel restrictions 2. Fewer opportunities to eat/drink out	1. Gov't guidance on travel restrictions 2. Fewer opportunities to eat/drink out	No change

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

Key Metrics	Week 2	Week 3	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-27	-27	0
Anticipated number of U.K. holidays compared to normal (% net)	-31	-30	-1
UK near-term holiday/short break confidence (June/July-August confident)	13%/25%	16%/28%	+3/+3
UK medium-term holiday/short break confidence (Sept to Oct/Nov-Dec confident)	43%/54%	50%/58%	+7*/+4*
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	75%	73%	-2
Proportion going on a UK short break *or* holiday between June-Sept	22%	23%	+1
Split between holiday / short break / don't know for next trip between June-Sept	41%/52%/6%	42%/54%/4%	+1/+2/-2

Week 3: 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 2	Week 3	Weekly Shift
Leading England destination likely to stay in between June - Sept	South West	South West	No change
Main *type* of destination likely to stay in between June - Sept	Traditional coastal/seaside town	Countryside or village	No significant change
Main accommodation type likely to stay in between June - Sept	Hotel/motel/inn	Caravan/camping	No significant change

Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 2	Week 3	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

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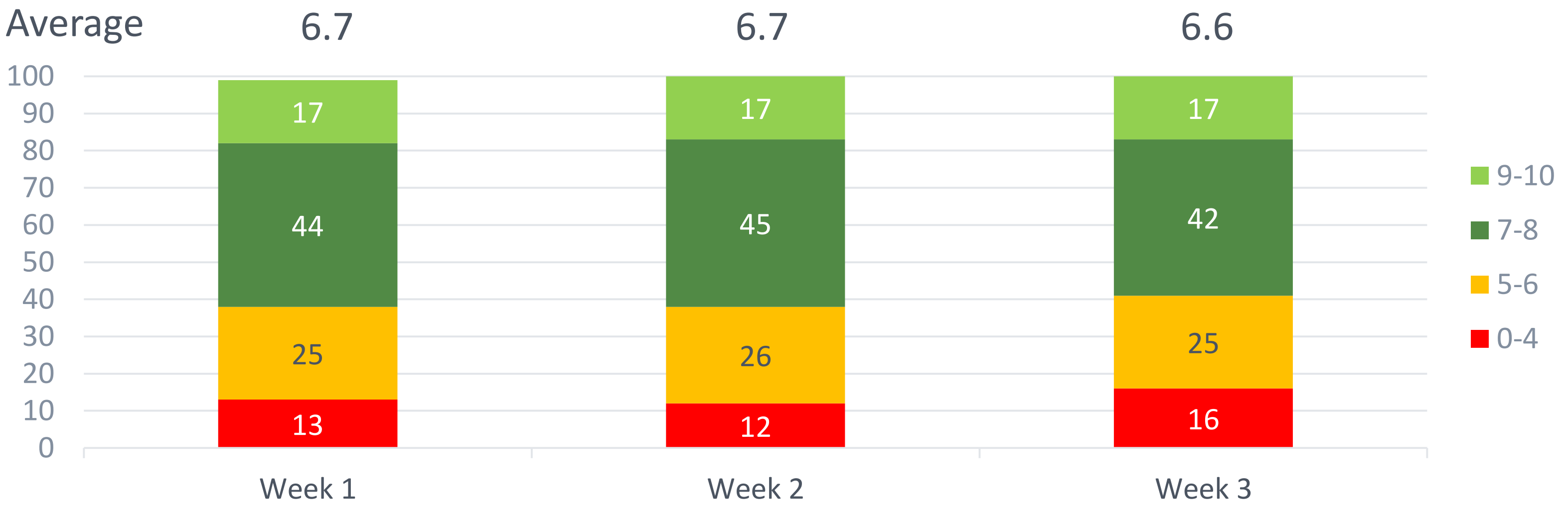
The national mood and perceptions of the situation in relation to COVID-19

- Consistent with findings from weeks 1 and 2, 17% of U.K. adults describe their mood as 9 or 10 out of 10. However, the proportion rating their mood in the 0-4 range is significantly higher than in weeks 1 and 2.
- Therefore, average mood dips slightly to 6.6 overall.

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

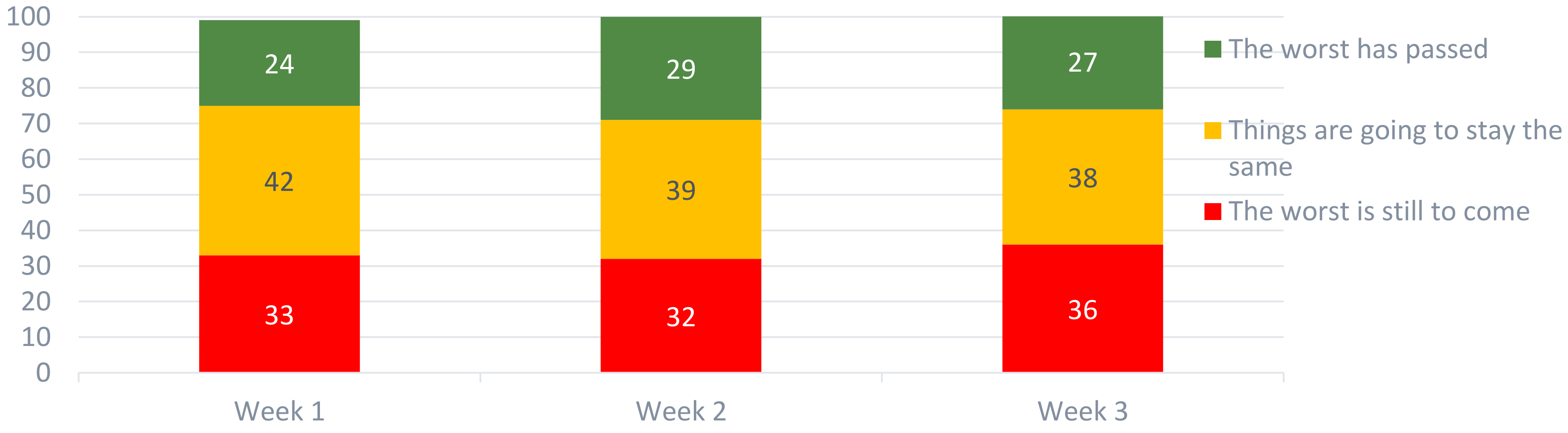


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753

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

- The majority (65%) feel either that the worst has passed or things are going to stay the same (slightly lower than the 68% reported in week 2).
- 36% of U.K. residents feel that the worst is still to come, which represents a significant rise on the 32% that stated this in week 2.

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



Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753

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

- 29% believe that life will return to 'something close to normal' by September, rising to 52% by the end of the year. Both figures have decreased marginally since weeks 2 and 1 of this survey.

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

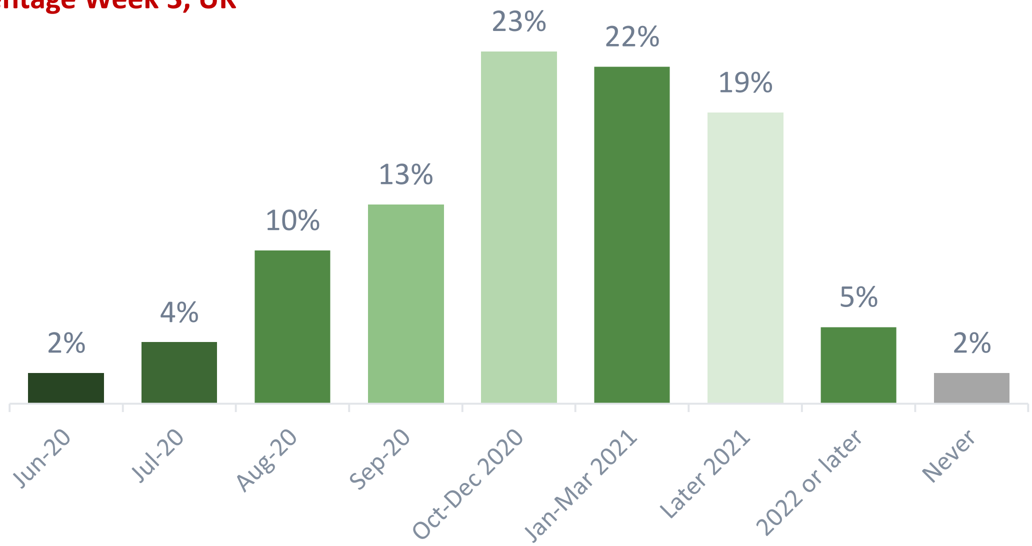
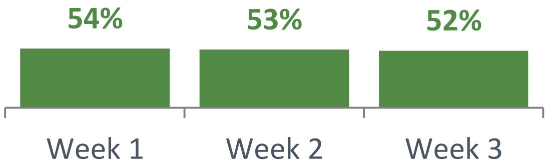


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

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

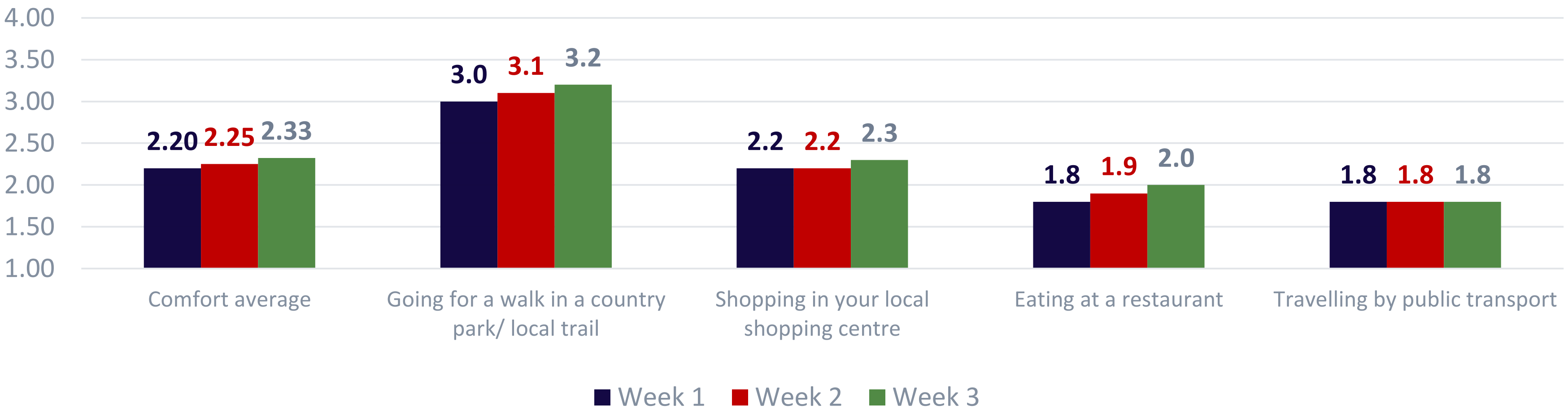


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753

Appetite for Risk

- The 'appetite for risk' score stands at 2.33 out of 4 (4 representing 'very comfortable'), which is the second consecutive week of marginal gains.
- The only activity that hasn't shown any kind of increase since week 1 is travelling by public transport, which remains in last place.

Figure 6. Level of comfort conducting a range of activities separately and combined, Average Score week-on-week where 1= not at all comfortable doing activity and 4= very comfortable doing activity, UK



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances Mean average based on those that gave a score of 1-4. 'Net: comfort average' is calculated as a straight average of the four scores. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753

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

- Of the U.K. adults that would ordinarily book a domestic trip in these time periods, 16% would feel confident that they would be able to do so in June, rising to 28% in July to August, 50% in September to October, and 58% in November to December. 73% would feel confident taking a trip from January 2021 onwards

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 3, 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 week 2 respondents that would consider going on a holiday or short break in these periods: June n=1,024, July-August n=1,220, September-October n=1,364, November-December n=1,377, January 2021 onwards n=1,527

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

- ‘Restrictions on travel from government’ is the leading reason cited for the lack of confidence in being able to take domestic trips between June and August (52% stating this). It is also a factor from September onwards (41%) but is second to ‘concerns about catching COVID-19’ (54%)
- The perception of having fewer opportunities to eat/drink out are also a key factor across both time periods.

Figure 8. Top 5 reasons for not being confident about travelling between June to August , Percentage Week 3, UK

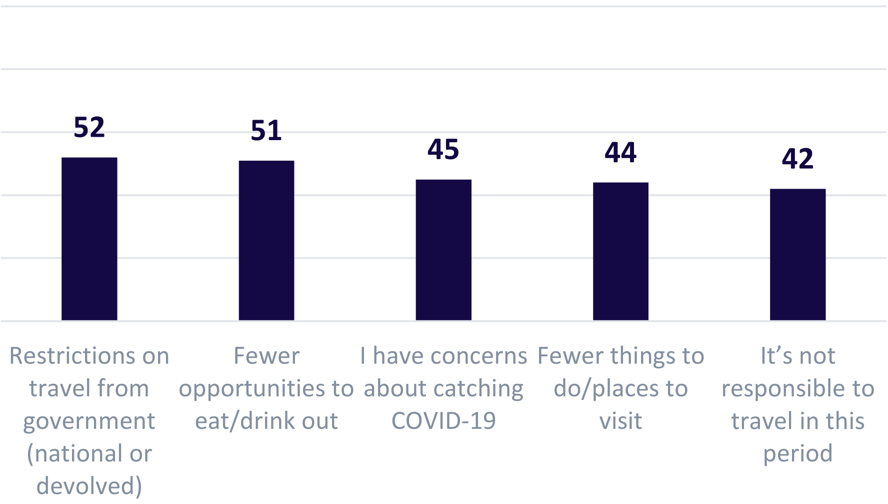
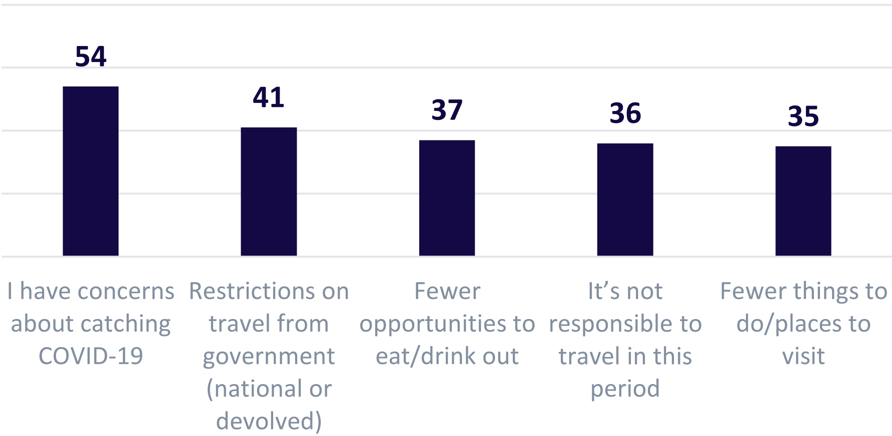


Figure 9. Top 5 reasons for not being confident about travelling from September onwards, Percentage Week 3, UK



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=551 and from September onwards n=819

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

- Compared to normal, the public anticipates taking fewer short breaks (net -27) and holidays of 4+ nights (net -30) in the UK between now and year end, which is virtually unchanged from Week 2.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 3, UK

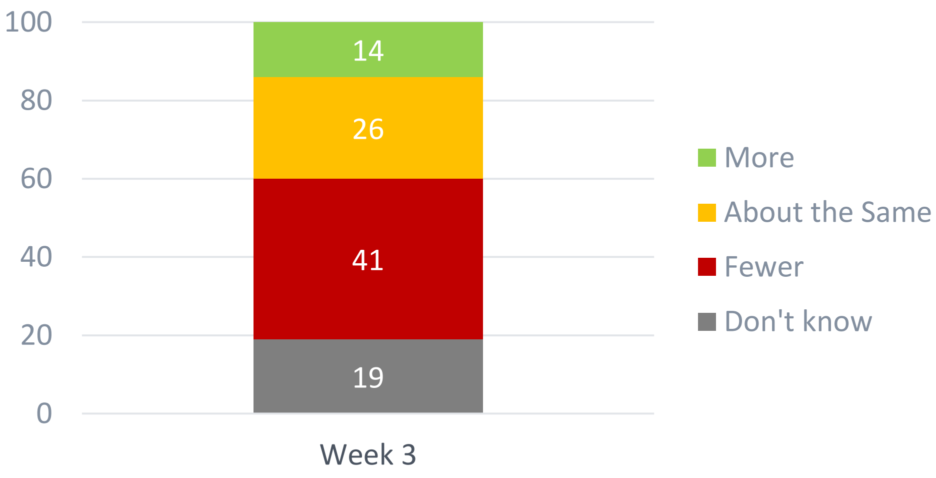
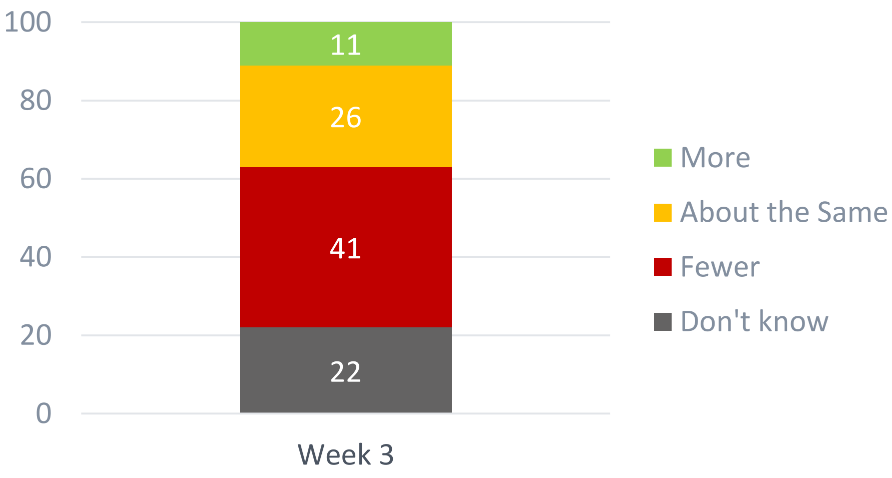


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 3, UK



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 3 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 (also -42) by the end of the year compared to normal. As in week 2, the net negative intention for overseas trips is significantly more pronounced than for domestic.

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

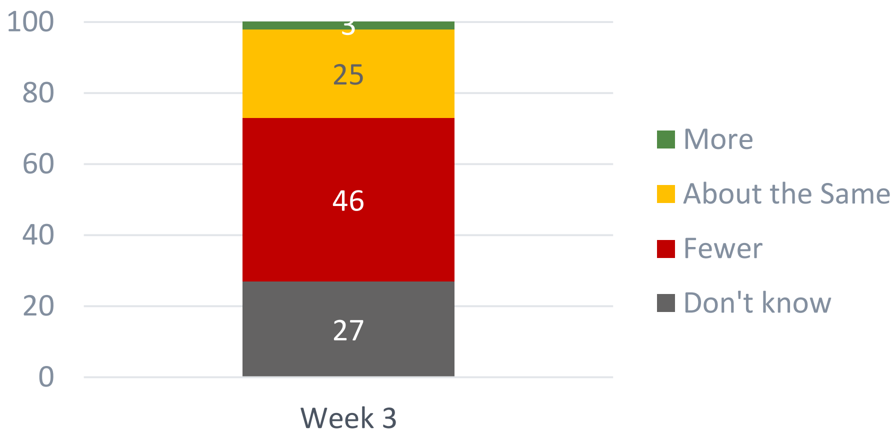
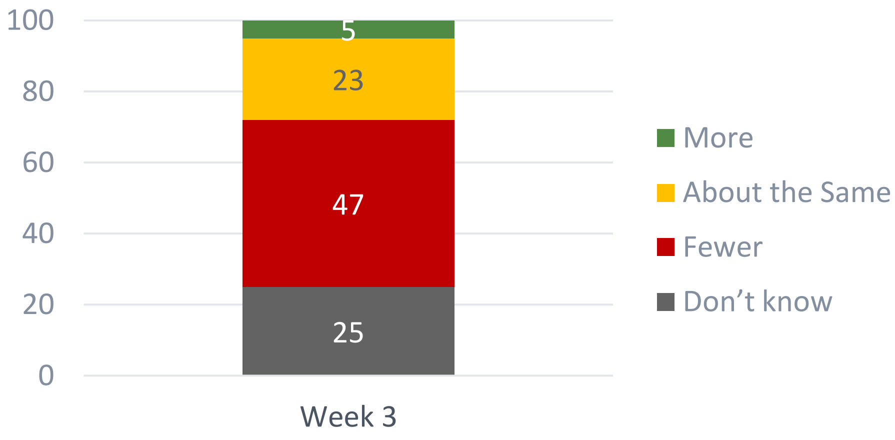


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 3, UK



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 3 respondents n=1,753

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

- 40% have either already planned or intend to plan a U.K. short break or holiday by September (while for booking it's 35%)

Figure 14. When anticipate PLANNING next UK holiday or short break, Percentage Week 3, UK

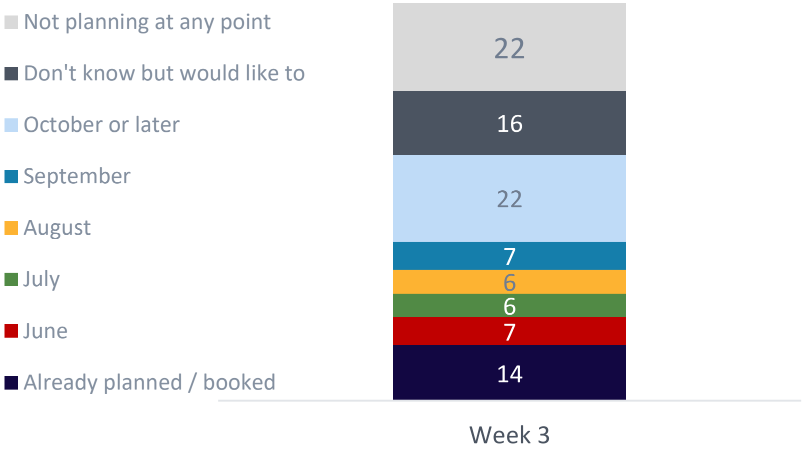
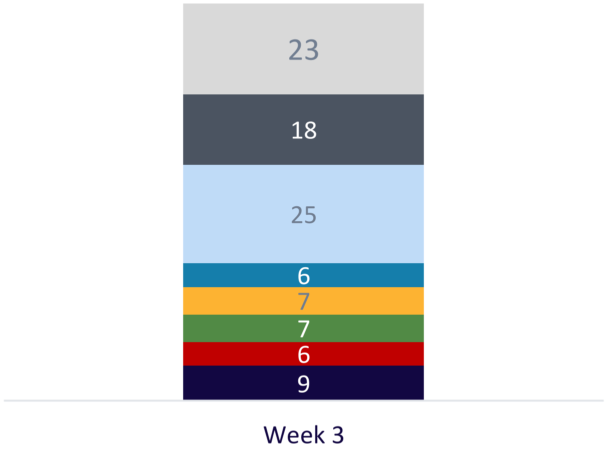


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 3, UK



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 3 respondents n=1,753

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

- 23% of U.K. adults anticipate actually *going* on their next U.K. short break or holiday by this September, marginally higher than the 22% stating this in week 2, and significantly higher than the 19% intending to do so in week 1
- 36% plan on taking their next UK trip in October or later.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 3, UK

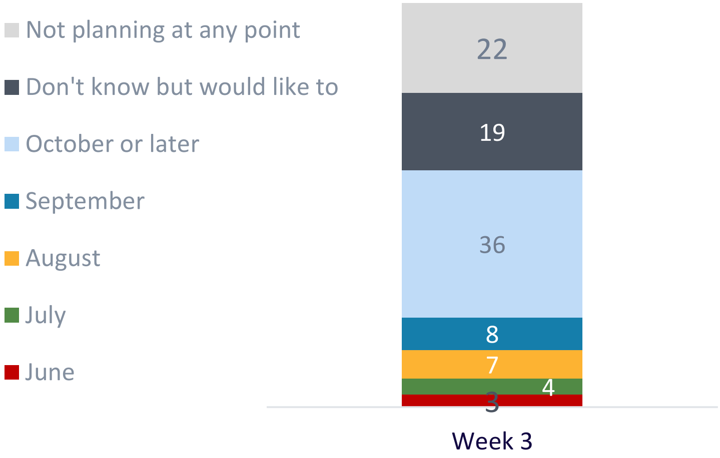
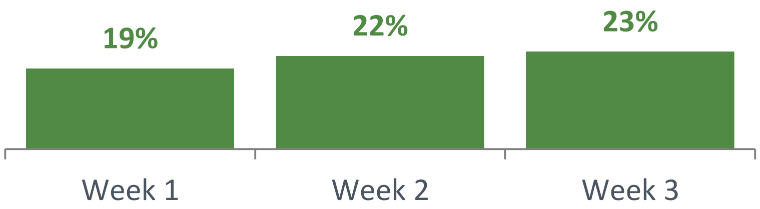


Figure 17. Proportion expecting to go on next UK trip by September, Percentage week-on-week, UK

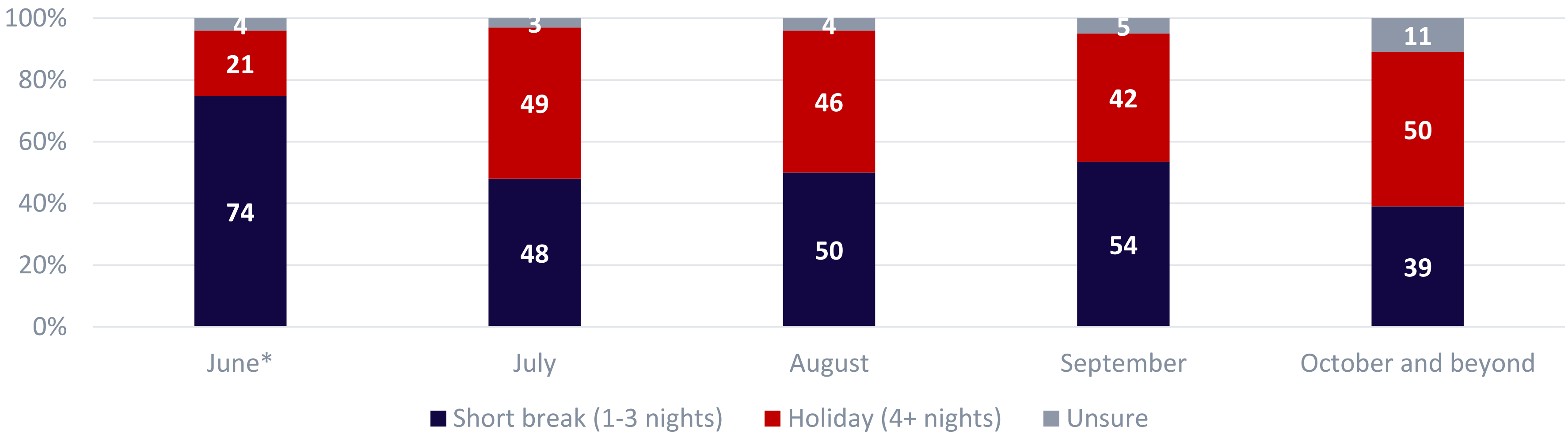


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757 Week 3 n=1,753

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

- Short breaks make up the majority of holiday types in June and September – the two shoulder months outside of the school holiday period.
- Trips to Wales, Scotland, the South East and the South West are most likely to be of 4+ nights. Trips to the East of England, the West Midlands and East Midlands are more likely than average to consist of short breaks.

Figure 18. Length of next UK holiday or short break by time period, Percentage Week 3, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 3 respondents intending to take next holiday in each time period June n=46*, July n=72, August n=138, September n=133, October and beyond n=651
*Indicates small base size. Please treat with caution.

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

- The South West is most likely to attract U.K. short break and holiday visitors between June and September this year (19% intending to do so). Thereafter, seven regions that generate broadly similar levels of holiday interest.
- From October onwards, there is a clearer hierarchy of preference with the South West, Scotland, London and North West more likely to attract the highest proportion of domestic visitors.

Figure 19. Where planning on staying on next UK overnight trip in June to September, Percentage Week 1-3 merged data, Top 10, UK

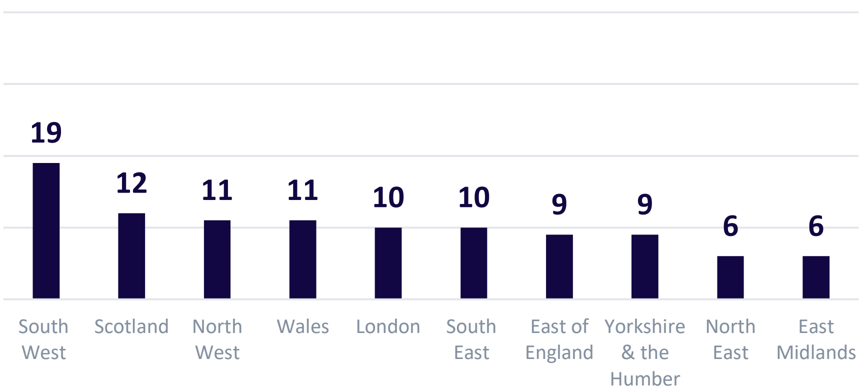
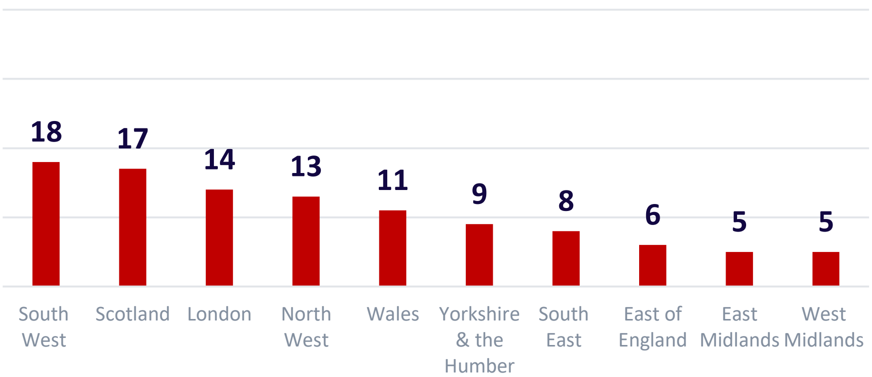


Figure 20. Where planning on staying on next UK overnight trip from October onwards, Percentage Week 1-3 merged data, Top 10, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 1 to 3 respondents planning on taking a holiday or short break in the UK between June and September n=1,065 and from October onwards n=1,886.
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 predominant mode of transport. This is followed by 'train', while 'plane' leads the sub-10% modes of transport.

Figure 21. Top 5 main modes of travel of destination for trip in June to September, Percentage Week 3, UK

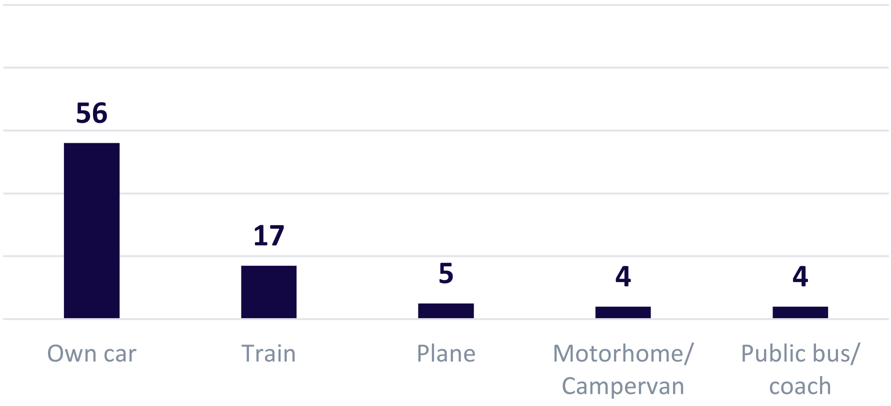
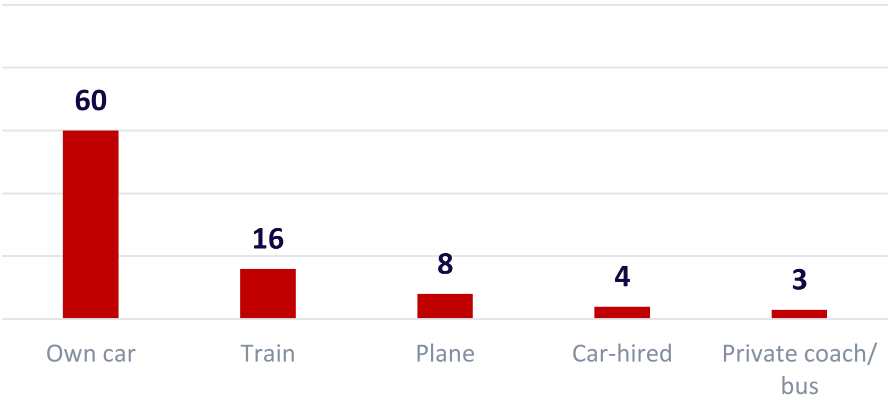


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 3, UK



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=389 and from October onwards n=651

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

- ‘Countryside or village’ (31%) and ‘traditional coastal/seaside town’ (30%) are the two main destination types for a trip between June and September.
- From October onwards, ‘countryside or village’ (33%), ‘city or large town’ (31%) and ‘traditional coastal/seaside town’ (30%) are the three preferred destination types.

Figure 23. Main type of destination for trip in June to September, Percentage Weeks 1-3 merged data, UK

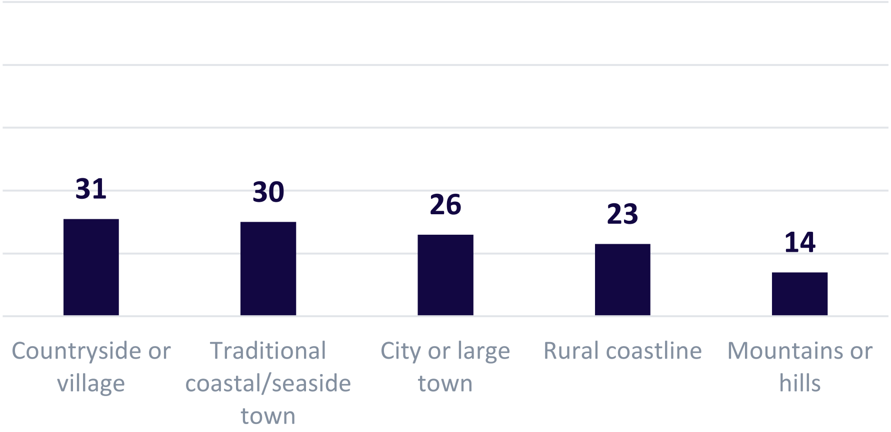
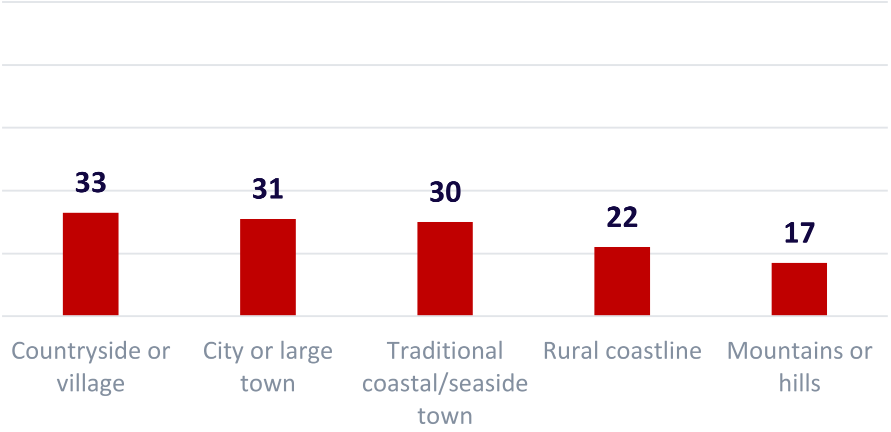


Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 1-3 merged data, UK



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 1 to 3 respondents planning on taking a holiday or short break in the UK between June and September n=1,065 and from October onwards n=1,886.
Three weeks of research merged to increase statistical reliability

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

- There is a relatively even split in the types of accommodation people are likely to use on their trips between June and September, with ‘caravan/camping’ (35%), ‘hotel/motel/inn’ (34%), ‘private home’ (33%) and ‘commercial rental’ (32%) each generating interest from around a third
- From October onwards, ‘hotel/motel/inn’ (46%) is significantly more likely to attract visitors than any other accommodation type.

Figure 25. Accommodation planning on staying in on next UK overnight trip in June to September, Net percentage Weeks 1-3 merged data, UK

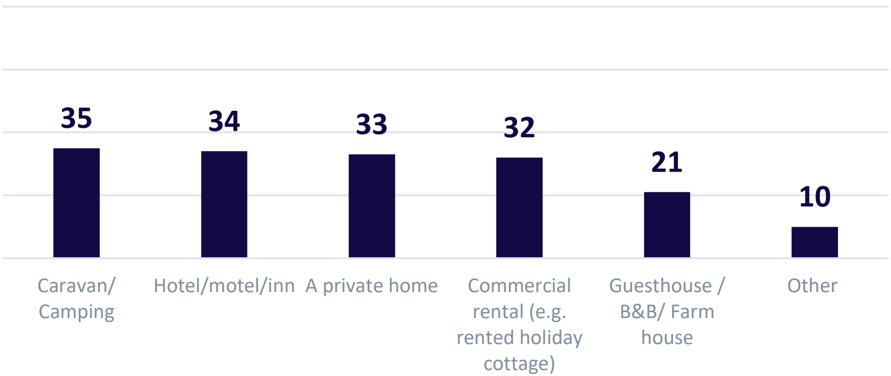
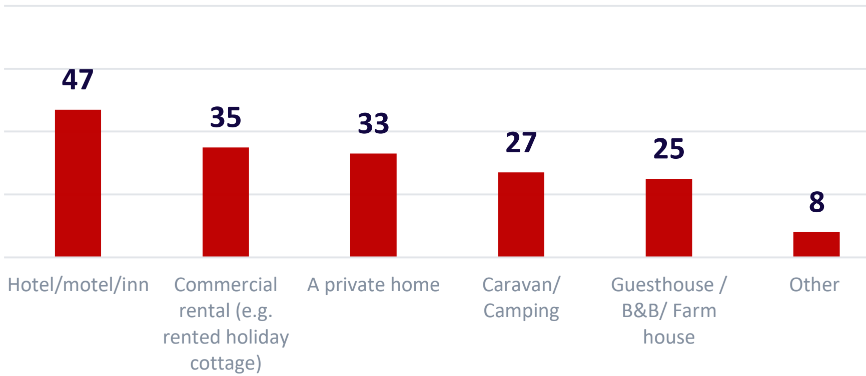


Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Weeks 1-3 merged data, UK

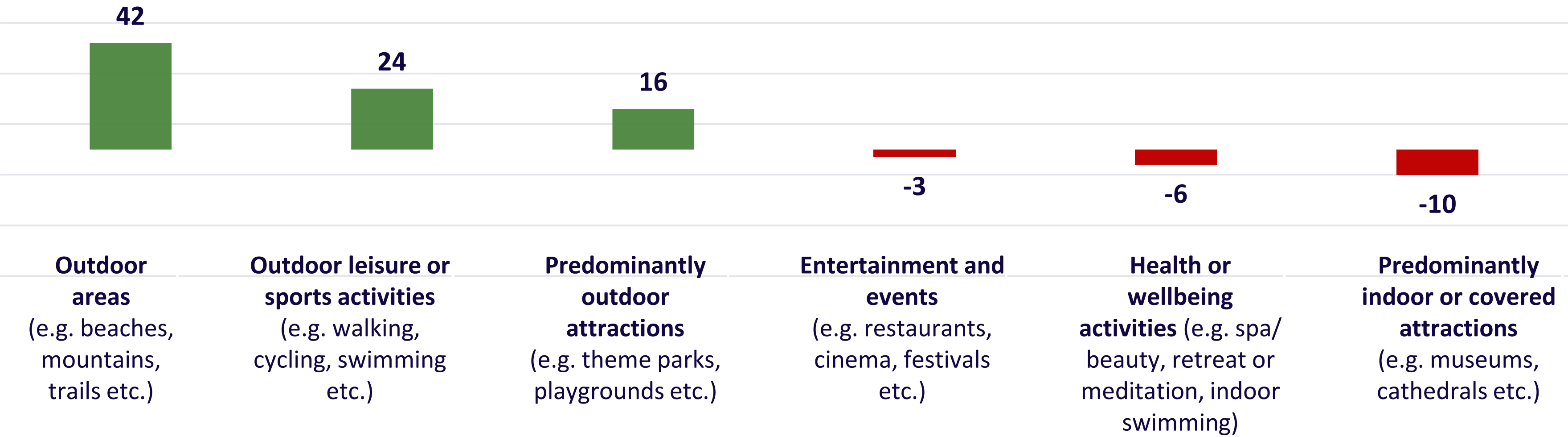


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 1 to 3 respondents planning on taking a holiday or short break in the UK between June and September n=1,065 and from October onwards n=1,886.
Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

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

Figure 27. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 3, UK



QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All week 3 respondents n=1,753

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 3 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 2 and 1 where appropriate. Week 3 fieldwork was conducted between 1st June and 5th June 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.