COVID-19 Consumer Weekly Tracker

Week 5

Fieldwork Period: 15th – 19th June 2020

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 5: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 4	Week 5	Weekly Shift
National mood (average score out of 10)	6.6	6.6	+/-0.0
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	31%	33%	+2
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.33	2.35	+/-0.02
Normality score (proportion expecting normality by September)	23%	18%	-5*
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. Fewer opportunities to eat/drink out 2. Gov't guidance on travel restrictions	Change in order

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

Key Metrics	Week 4	Week 5	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-29	-26	-3
Anticipated number of U.K. holidays compared to normal (% net)	-30	-29	-1
UK near-term holiday/short break confidence (June/July/August/Sept. confident)	5%/10%/23%/40%	5%/11%/25%/40%	0/+1/+2/0
UK medium-term holiday/short break confidence (Oct-Dec confident)	58%	54%	-4
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	77%	72%	-5
Proportion going on a UK short break *or* holiday between June-Sept	22%	20%	-2
Split between holiday / short break / don't know for next trip between June-Sept	40%/53%/7%	43%/53%/4%	+3/0/-3

Week 5: 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 4	Week 5	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	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between June - Sept	Caravan/camping	Caravan/camping	No change

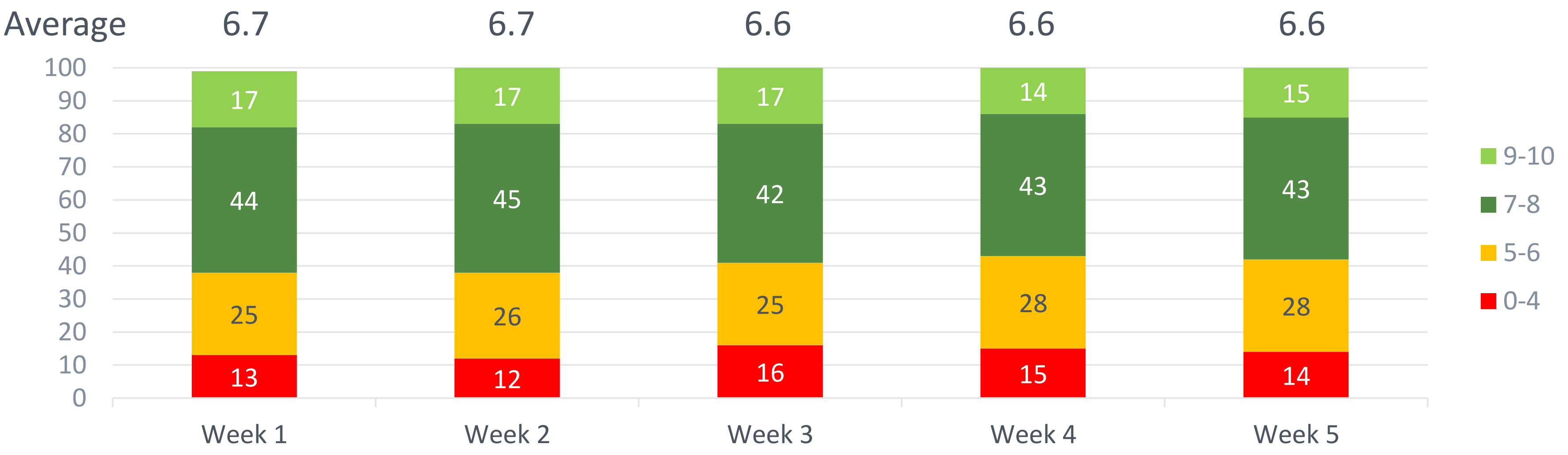
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 4	Week 5	Weekly Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

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

- The average mood of UK residents is 6.6 out of 10, consistent with weeks 4 and 3, and very marginally lower than weeks 1 and 2
- 15% described their mood as 9-10/10, relatively consistent with week 4 of the research

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

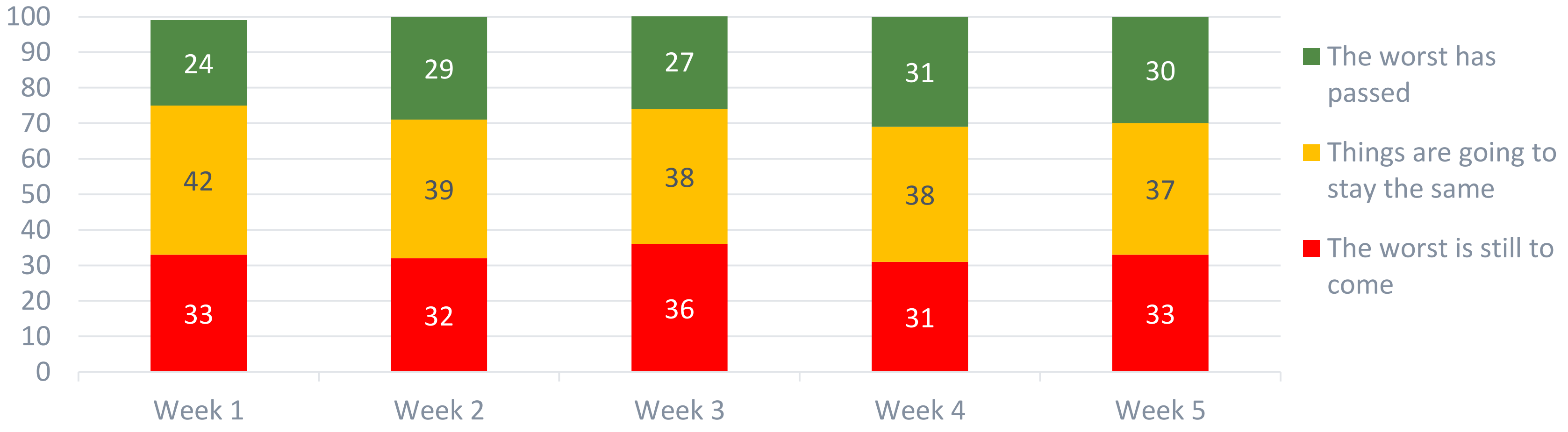


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739

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

- As in week 4 of the research, 3 in 10 of the U.K. population feel that 'the worst has passed' in relation to COVID-19. A third (33%) are more pessimistic and feel the worst is still to come.

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; Week 4 n=1,746; Week 5 n=1,739

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

- 18% of U.K. residents believe that life will return to 'something close to normal' by September, the second consecutive week where expectations have dropped significantly. 41% think something close to normality will return by December, which is also significantly lower than in week 4.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 5, UK

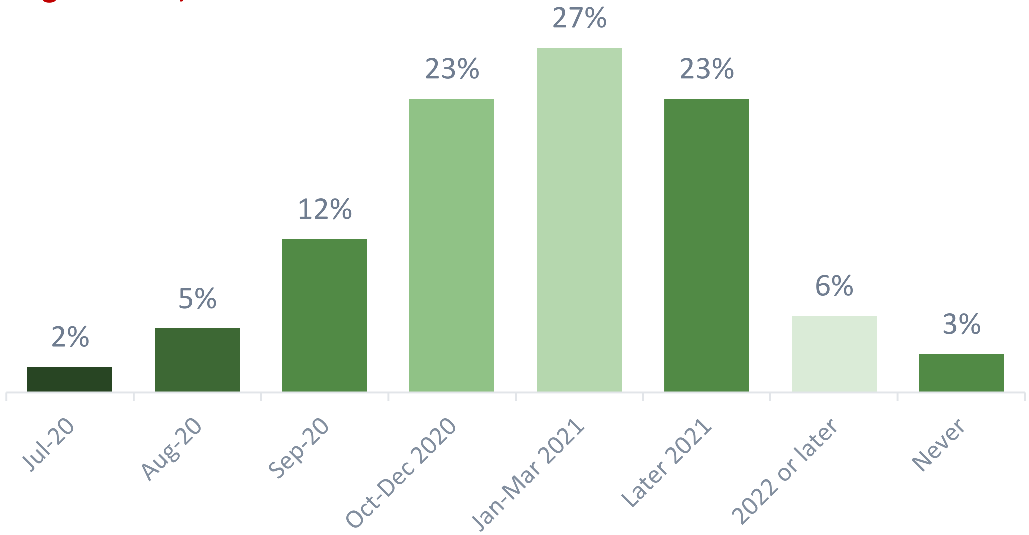


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

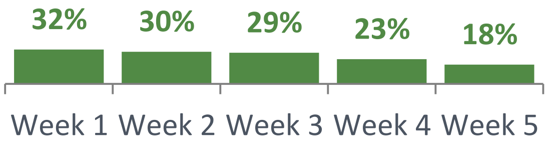
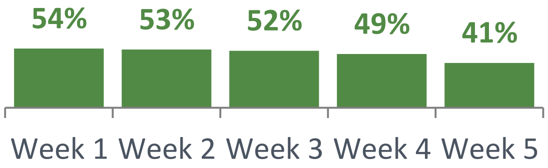


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

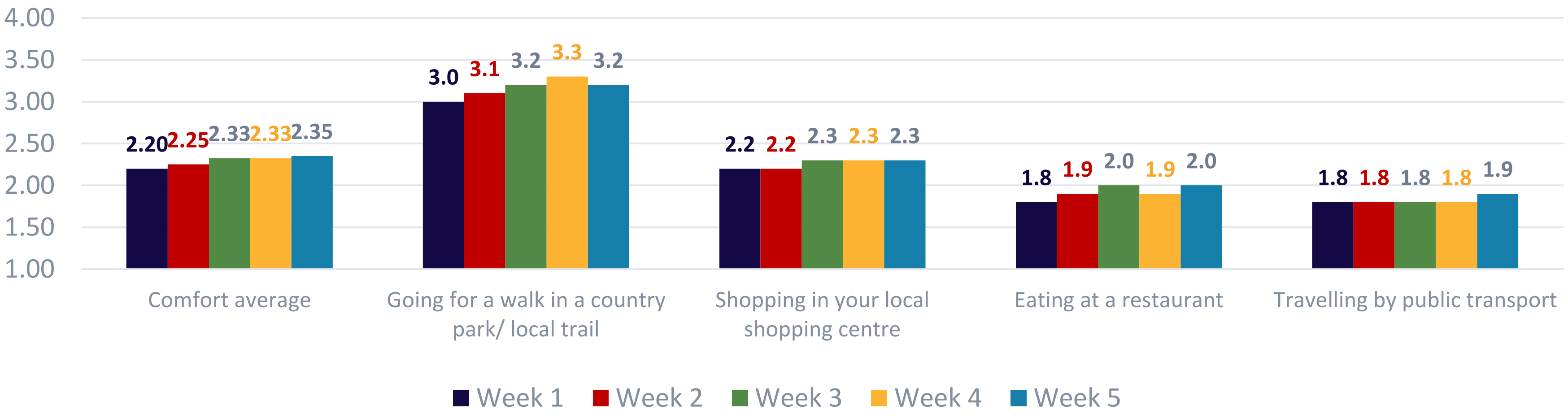


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739

Appetite for Risk

- The ‘appetite for risk’ score stands at 2.35 out of 4 (4 representing ‘very comfortable’), marginally higher than in week 4
- The rankings follow the patterns of previous weeks, with levels of ‘comfort’ corresponding to proximity to people.
- U.K. adults are feeling most comfortable with ‘going for a walk in a country park/local trail’ (3.2) followed by ‘shopping in your local shopping centre’ (2.3) and ‘eating at a restaurant’ (2.0). ‘Travelling by public transport’ continues to be in last place (1.9).

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

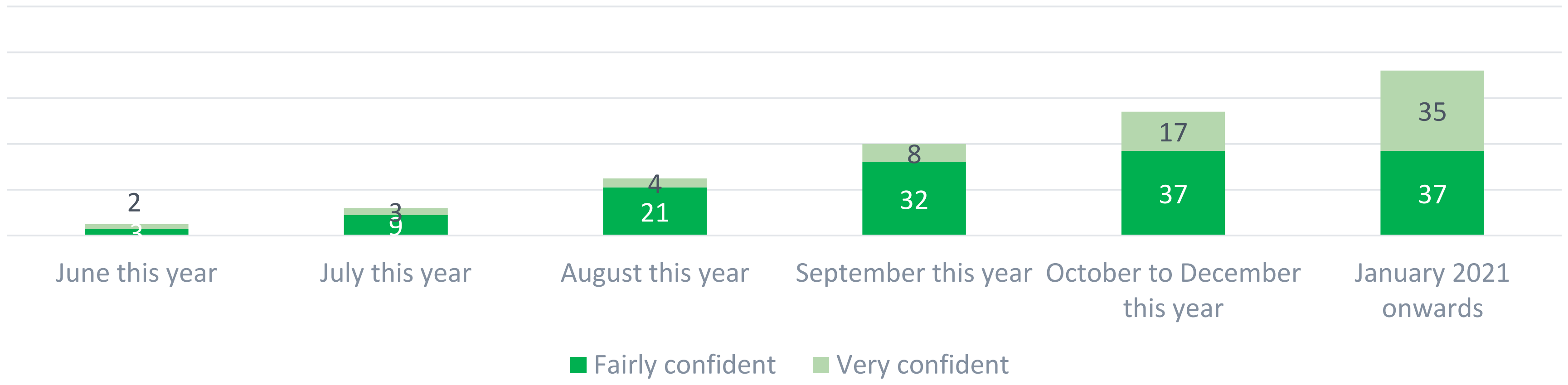


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances Mean average based on those that gave a score of 1-4. ‘Net: comfort average’ 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; Week 4 n=1,746; Week 5 n=1,739

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

- A minority of Britons are confident that they would be able to take a U.K. short break or holiday in June (5% confident) or July (12%). Confidence increases for periods later in the year - for August confidence more than doubles to 25% while September jumps to 40%.
- The majority are confident they'd be able to take a U.K. trip between October and December this year (54%) and from January 2021 onwards (72%).

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 5, 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 n=1,739

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

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

- ‘Fewer opportunities to eat/drink out’ is the leading reason denting the U.K. publics confidence about travelling between June and September this year (46% of those not confident stating this), followed by ‘restrictions on travel from government (45%) and ‘concerns about catching COVID-19’ (44%).
- From October onwards, concerns about catching COVID-19 is the leading reason, with 51% of those not confident travelling during this period stating this.

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

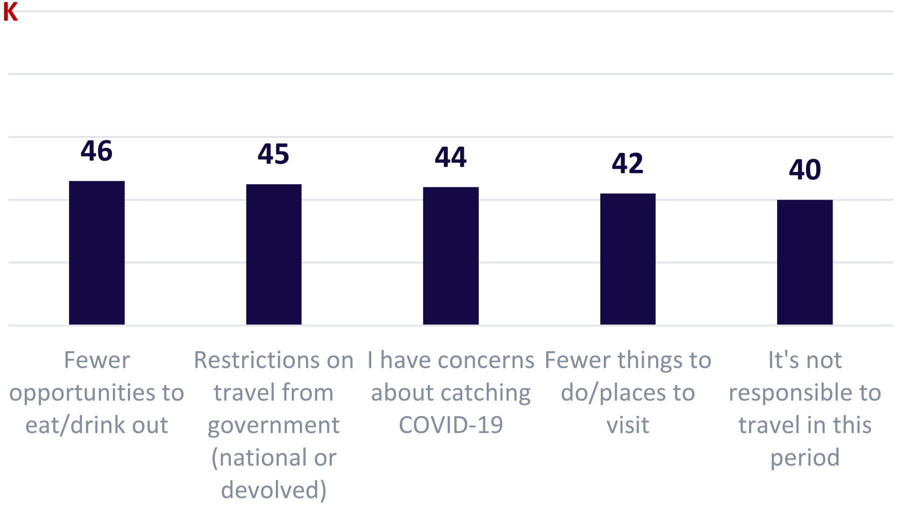
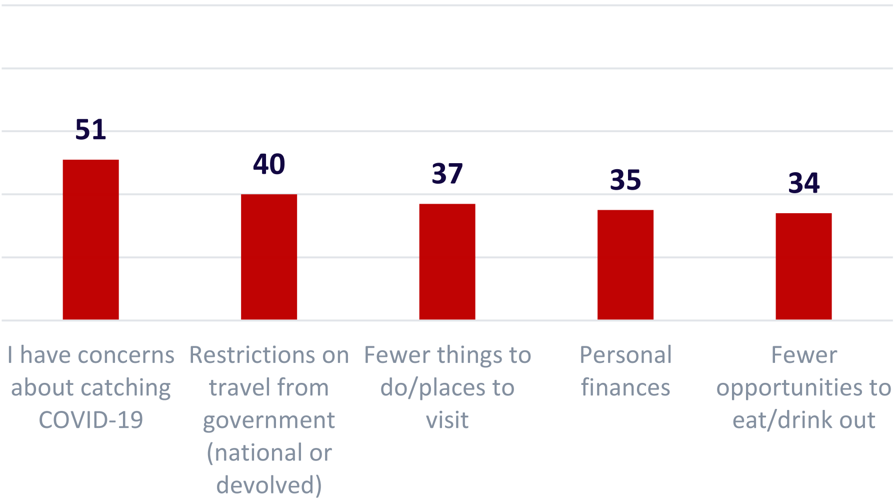


Figure 9. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 5, UK



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 September n=1,163 and from October onwards n=576.

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

- Compared to normal, U.K. adults anticipate taking fewer domestic short breaks (net -26) and holidays of 4+ nights (net -29) between now and the end of 2020. However, the net anticipation for both types of trip are marginally higher than in Week 4.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 5, UK

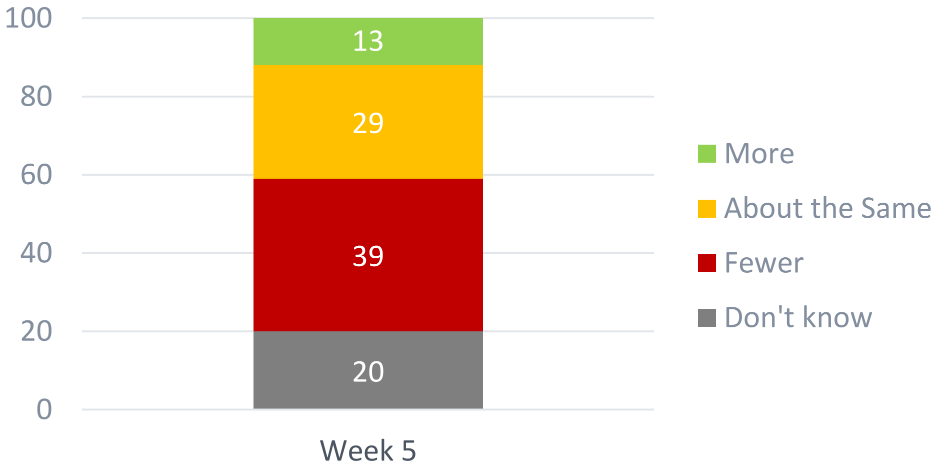
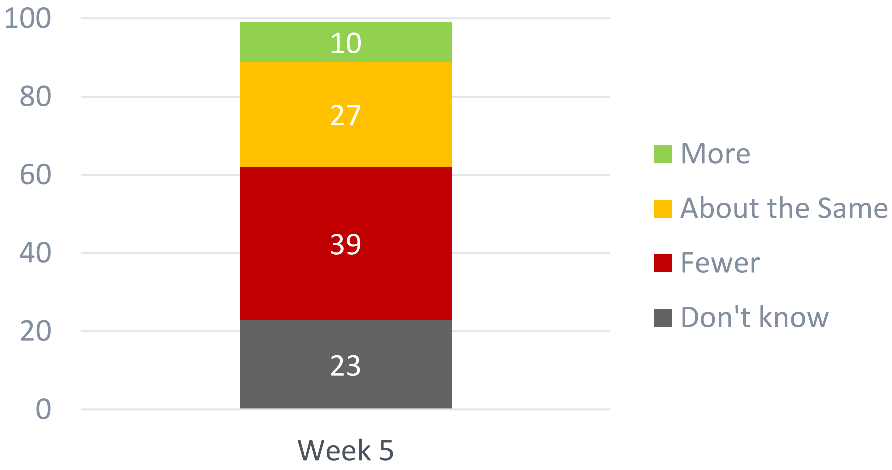


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 5, UK



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=1,739

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults also anticipate taking fewer overseas short breaks (-38) and holidays (-37) by the end of the year compared to normal, although as with UK trips, the net figure has marginally increased since Week 4.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 5, UK

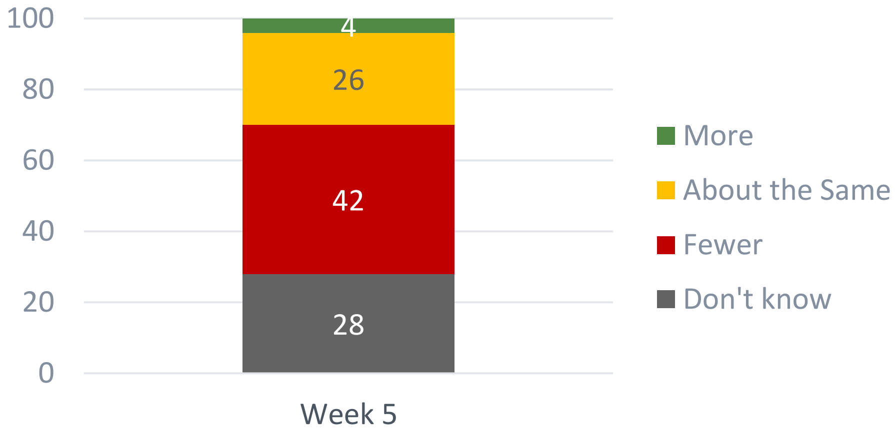
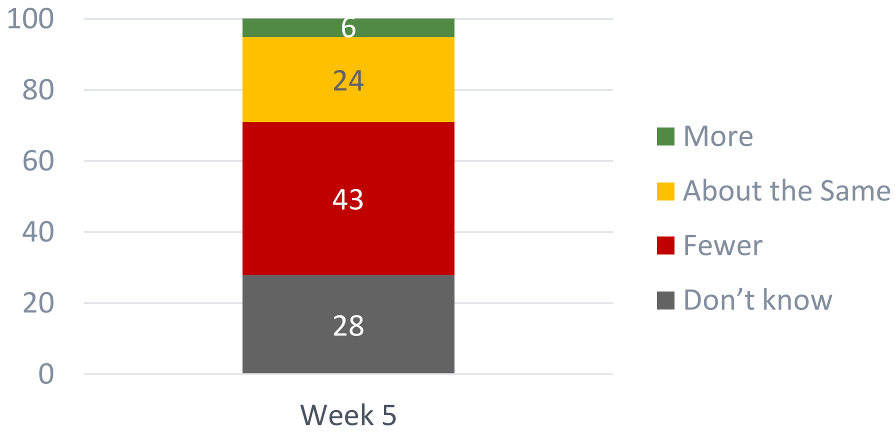


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 5, UK



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=1,739

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. 33% have already booked or intend to book their trip by this time.

Figure 14. When anticipate <u>PLANNING</u> <u>next</u> UK holiday or short break, Percentage Week 5, UK

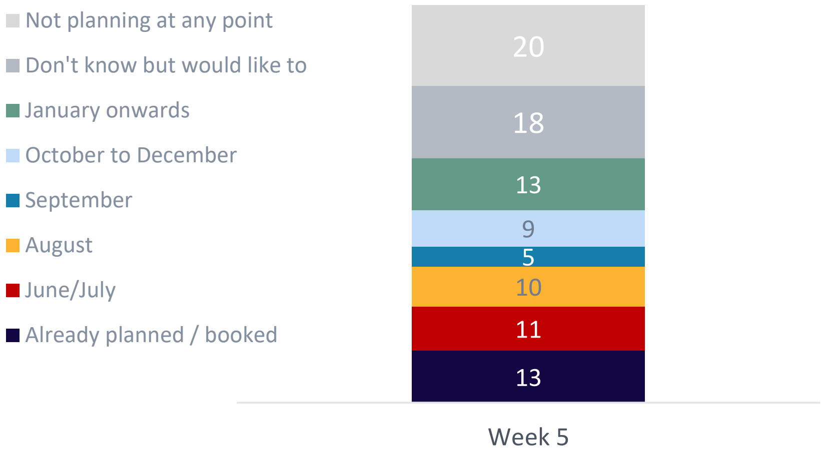
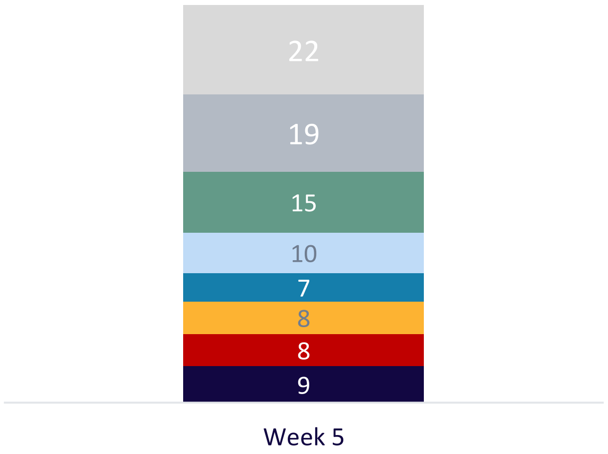


Figure 15. When anticipate <u>BOOKING</u> <u>next</u> UK holiday or short break, Percentage Week 5, UK



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=1,746

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

- 20% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, which is a slightly lower proportion than reported in Week 4, and significantly lower than in Week 3.
- 39% plan on taking their next domestic trip in October or later, whilst 19% state they would like to take a trip but remain unsure when they will do so.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 5, UK

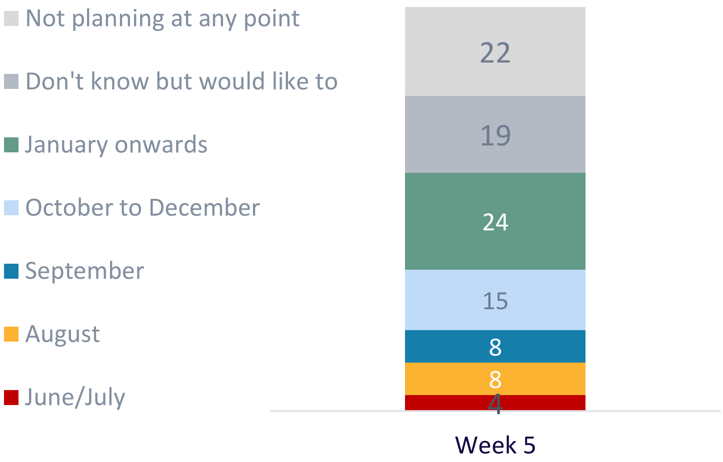
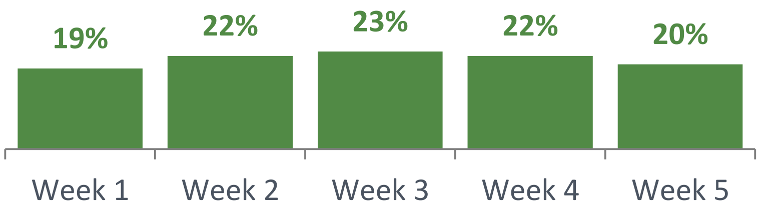


Figure 17. Proportion expecting to go on next UK trip by September, Percentage week-on-week, UK

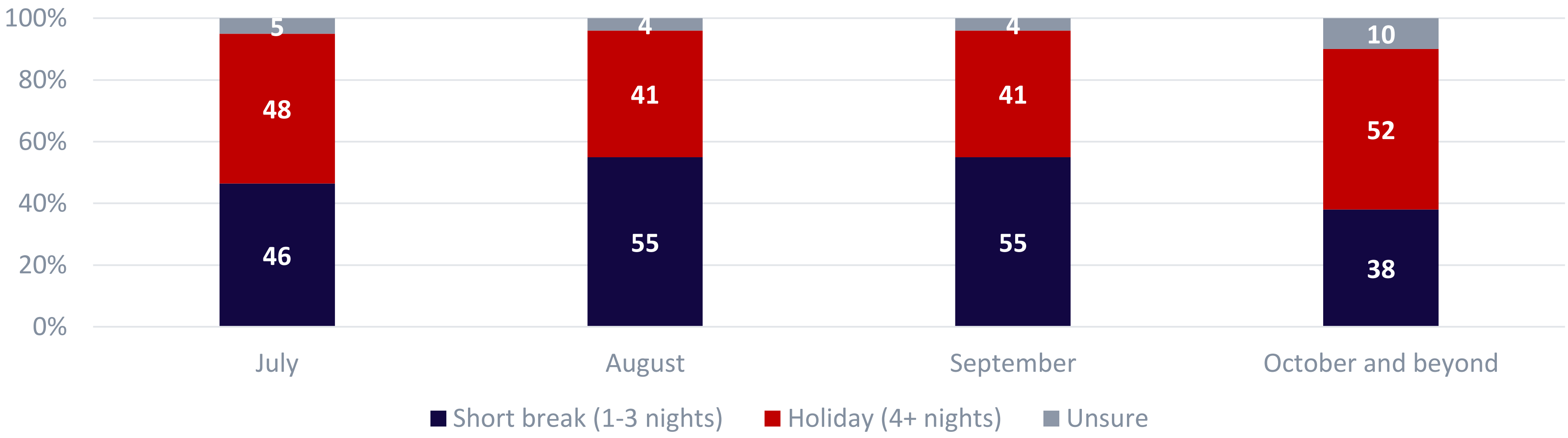


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757 Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739

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

- For trips planned in July there's a relatively even split between short breaks and holidays. In August and September, there's a clearer skew towards short breaks, whereas from October onwards, holidays of 4+ nights comprise the majority of trips.

Figure 18. Length of next UK holiday or short break by time period, Percentage Week 5, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 5 respondents intending to take next holiday in each time period July n=61, August n=140, September n=129, October and beyond n=688
June excluded due to small base sizes

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

- The South West is significantly more likely than any other part of the U.K. to receive visitors between June and September this year (21% intending to do so). It is followed by Scotland (12%) which is one of six regions/nations that generate interest of between 9% and 12% of those planning a domestic trip in this period.
- The South West, Scotland, London and The North West look set to be the most popular parts of the U.K. for trips taken from October onwards.

Figure 19. Where planning on staying on next UK overnight trip in June to September, Percentage Week 3-5 merged data, Top 10, UK

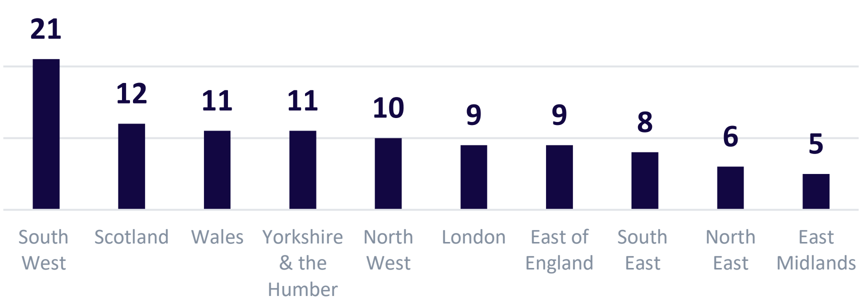
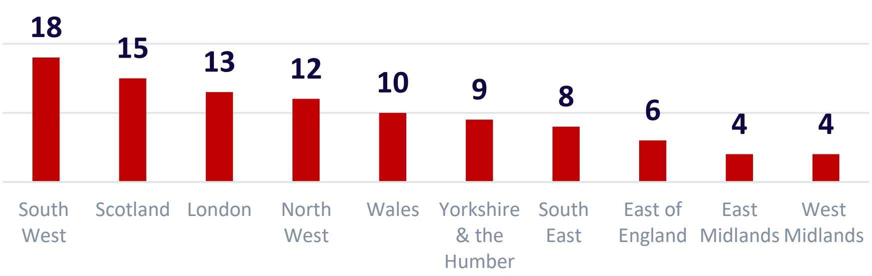


Figure 20. Where planning on staying on next UK overnight trip from October onwards, Percentage Week 3-5 merged data, Top 10, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 3-5 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=2,037. Three weeks of research merged to increase statistical reliability

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

- Across both time periods, ‘own car’ is by far the leading mode of transport – for 64% of trips between June and September, and 58% from October onwards. Train is the second most preferred mode across both periods, followed by plane.
- Travel by plane is more likely in October onwards than between June and September.

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

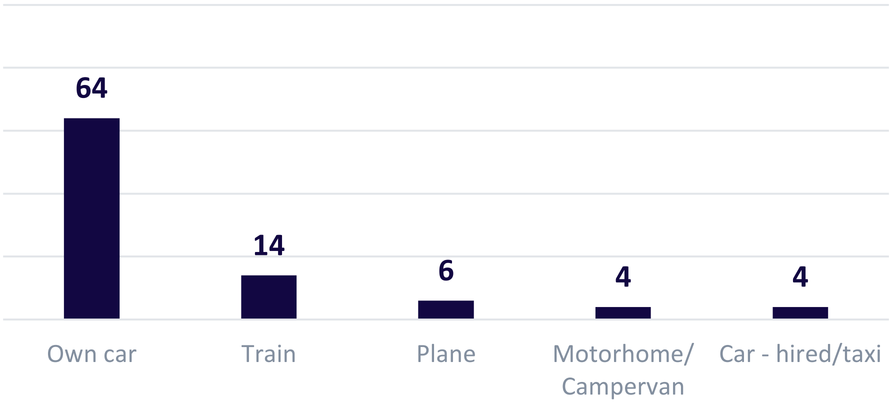
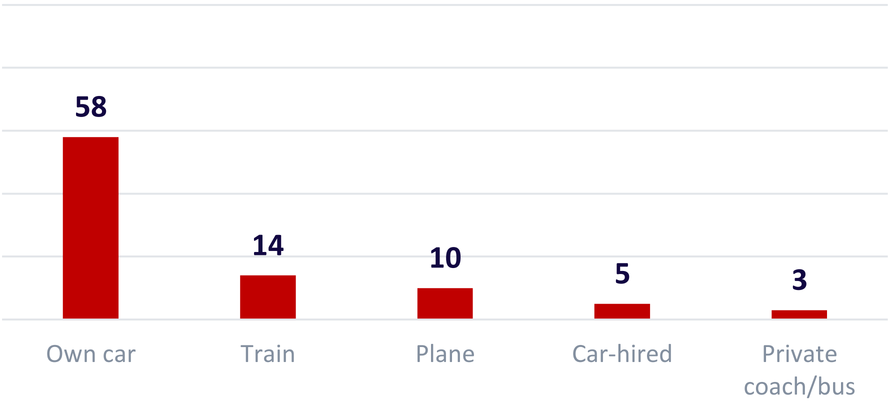


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 5, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 5 respondents planning on taking a holiday or short break in the UK between June and September n=338 and from October onwards n=688

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

- ‘Countryside or village’ (33%) and ‘traditional coastal/seaside town’ (32%) are the two most likely destination types for trips between June and September. These are followed by ‘city or large town’ (23%) and ‘rural coastline’ (also 23%), while ‘mountains or hills’ were indicated by 14%.
- From October onwards, ‘countryside or village’ (33%) again leads, while ‘city or large town’ (30%) is significantly more likely to be a destination compared to the June – September period.

Figure 23. Main type of destination for trip in June to September, Percentage Weeks 3-5 merged data, UK

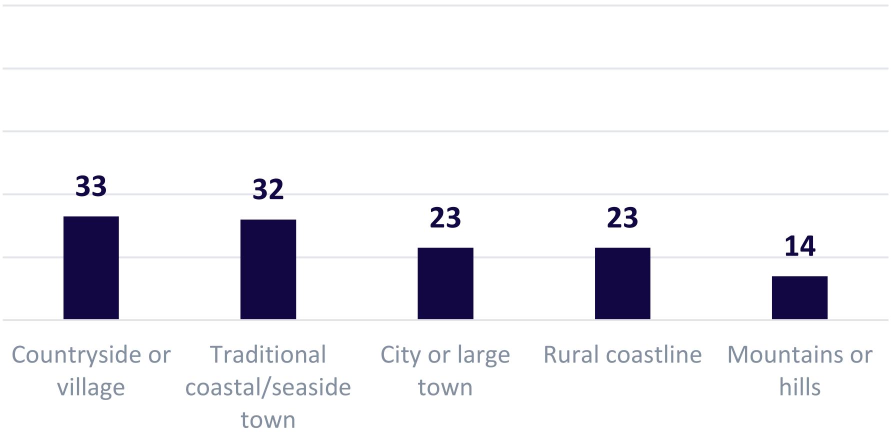
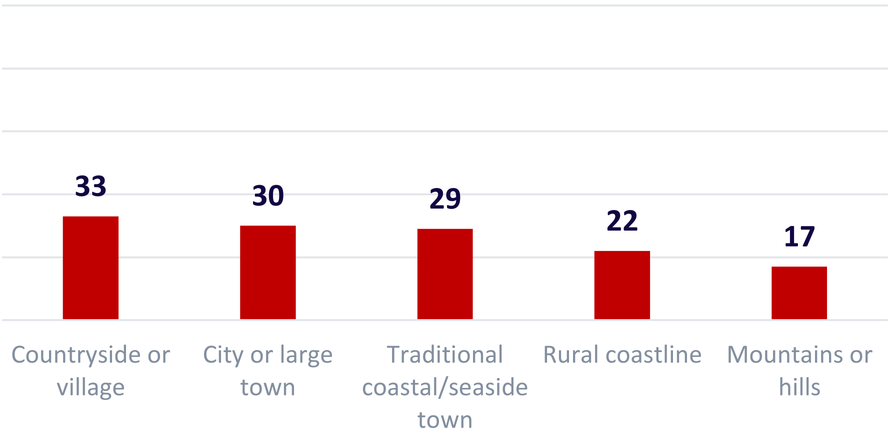


Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 3-5 merged data, UK



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 3-5 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=2,037. Three weeks of research merged to increase statistical reliability

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

- There remains a relatively even split in the types of accommodation people are likely to use on their trips between June and September. ‘Caravan/camping’ (37%), ‘private home’ (36%), ‘hotel/motel/inn’ (33%), ‘and ‘commercial rental’ (33%) each generating interest from around a third of those intending to take a trip.
- From October onwards, ‘hotel/motel/inn’ (44%) is significantly more likely to attract visitors than any other accommodation type. ‘Commercial rental’ (35%) and ‘private home’ (34%) are the next preferred accommodation types for trips planned during this period.

Figure 25. Accommodation planning on staying in on next UK overnight trip in June to September, Net percentage Weeks 3-5 merged data, UK

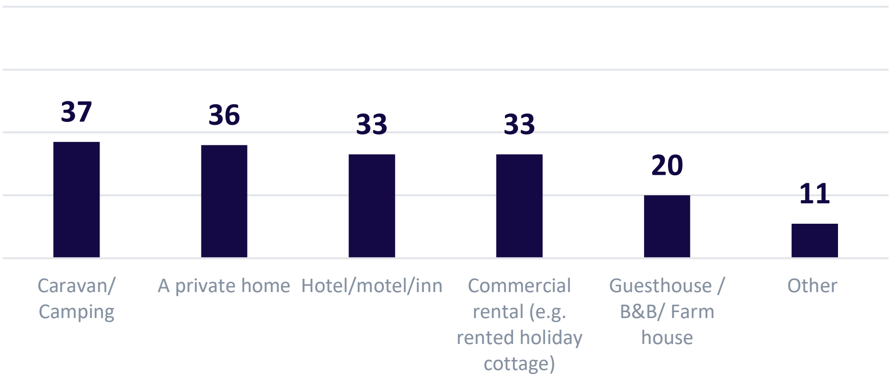
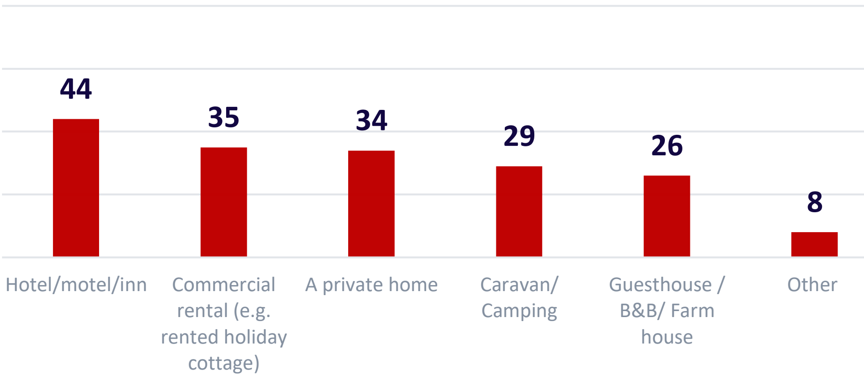


Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Weeks 3-5 merged data, UK

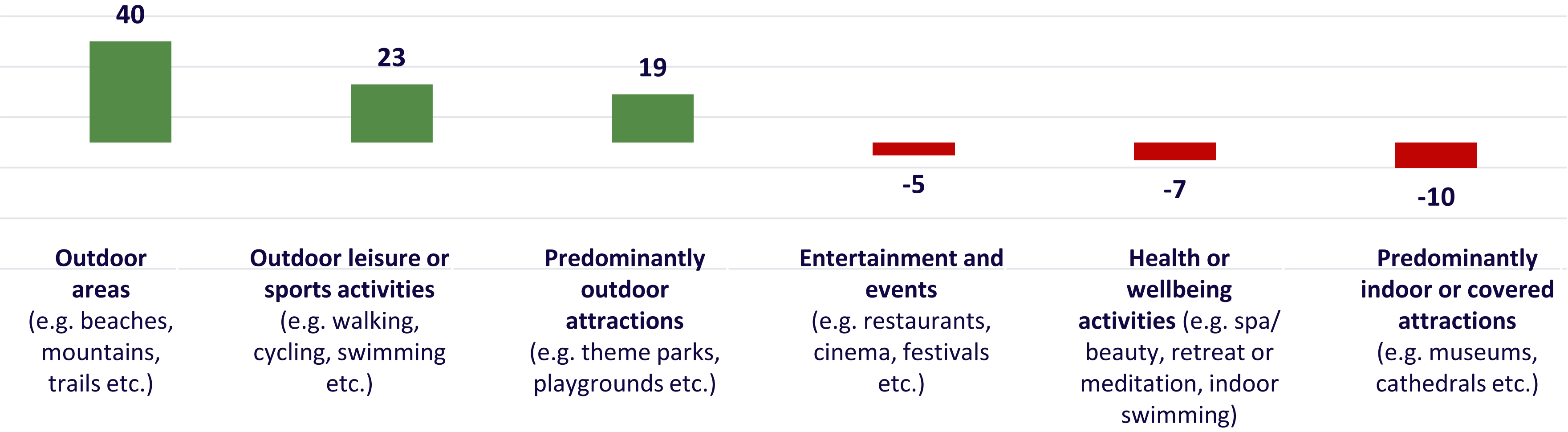


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 3-5 respondents planning on taking a holiday or short break in the UK between June and September n=1,083 and from October onwards n=2,037. Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more engagement than normal (net +40), followed by outdoor leisure or sports activities (net +23) and outdoor attractions (net +19). Entertainment and events (net -5), health or wellbeing activities (net -7) and predominantly indoor attractions (-10) are likely to attract fewer visitors 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 5, UK

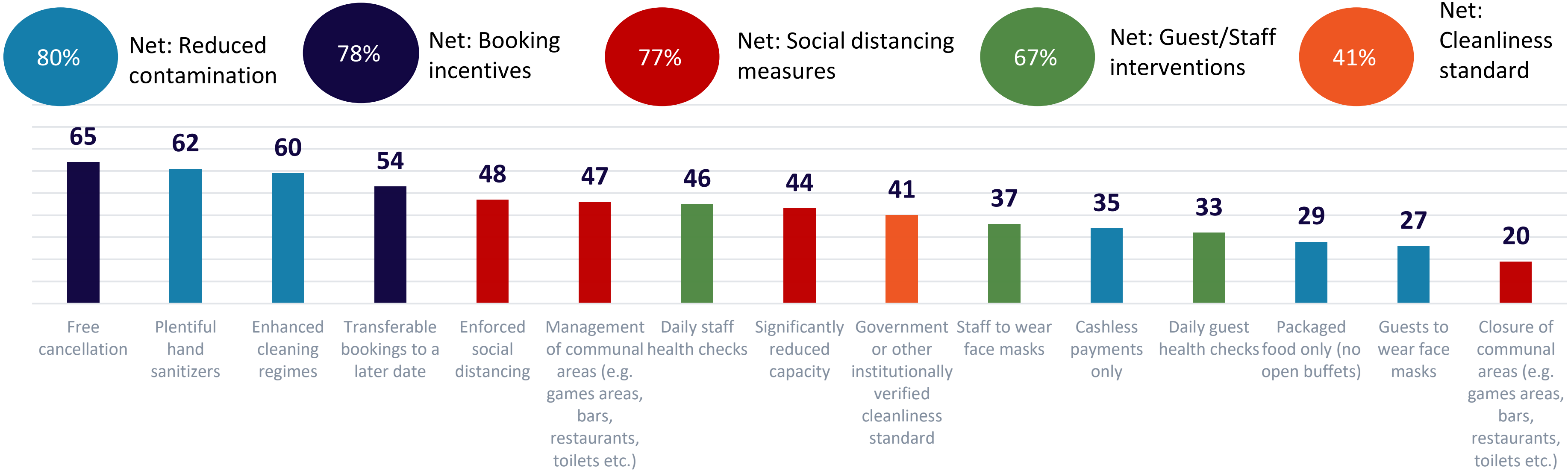


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All respondents n=1,739

Reassurance needed for people staying in a hotel post-lockdown

- On a net basis, steps to reduce contamination (80%), booking incentives (78%) and social distancing (77%) are the biggest forms of reassurance the public needs when planning a stay in paid accommodation between the June – September period.
- However, the single most cited factor is the provision of free cancellations.

Figure 28. Conditions that would need to be met to feel comfortable staying at a hotel after the lockdown has been lifted, Percentage and Net Percentages Week 5, UK



Q63, Which, if any, of these conditions would need to be met before you personally would consider staying in a paid accommodation after the lockdown has lifted? Base: All planning on a holiday or short break between June and September n=338

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 5 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 4, 3, 2 and 1 where appropriate. Week 4 fieldwork was conducted between 15th to 19th 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.