COVID-19 Consumer Weekly Tracker

Week 7

Fieldwork Period: 29 June – 3 July

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 7: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 6	Week 7	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')	27%	21%	-6*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.38	2.48	+0.1
Normality score (proportion expecting normality by September)	17%	15%	-2
The main reasons for not feeling confident about taking a trip between July-September (Top 2)	1. Concerns about catching COVID-19 2. Fewer opportunities to eat/drink out	1. Concerns about catching COVID-19 2. Fewer opportunities to eat/drink out	No change

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

Key Metrics	Week 6	Week 7	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-23	-23	0
Anticipated number of U.K. holidays compared to normal (% net)	-26	-27	-1
UK near-term holiday/short break confidence (July/August/Sept. confident)	14%/29%/43%	21%/31%/43%	+7*/+2/0
UK medium-term holiday/short break confidence (Oct-Dec confident)	54%	52%	-2
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	71%	69%	-2
Proportion going on a UK short break *or* holiday between July-Sept	24%	25%	+1
Split between holiday / short break / don't know for next trip between July-Sept	41%/52%/6%	46%/49%/6%	+5*/-3/0

Week 7: 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 6	Week 7	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

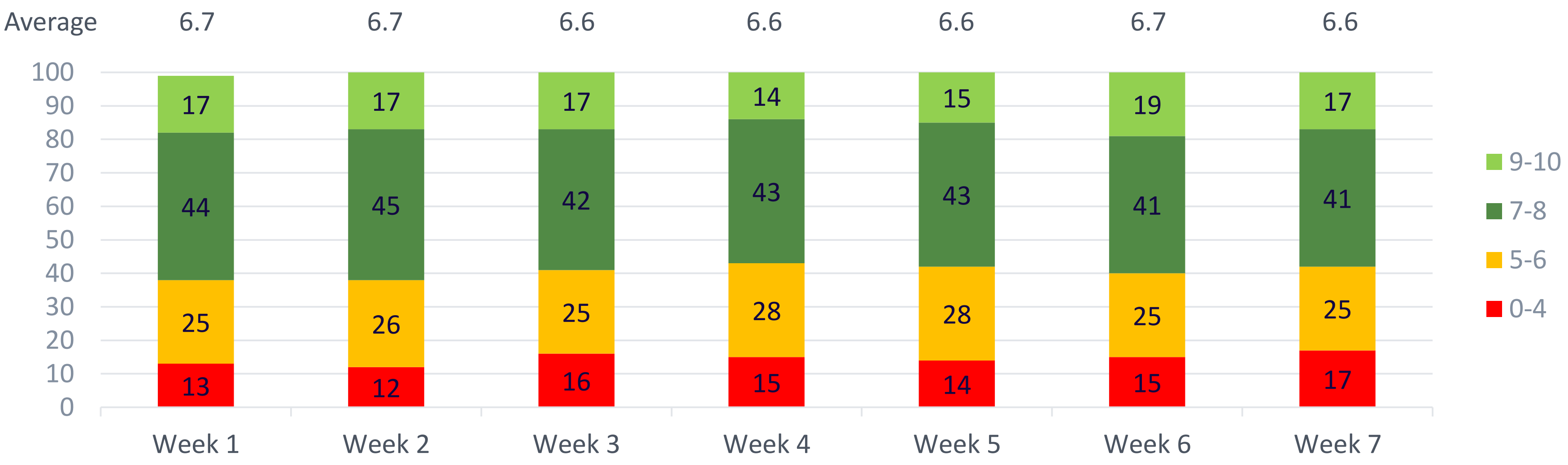
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 6	Week 7	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, back to the same level as weeks 3 to 5.
- 17% described their mood as 0-4/10, the highest proportion since the research began.

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

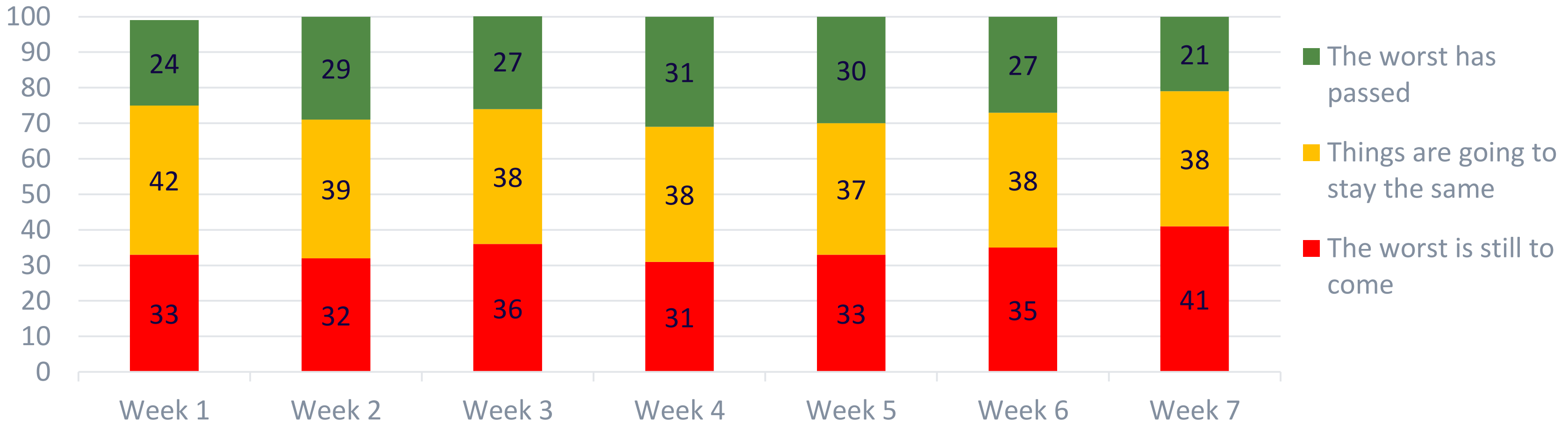


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757

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

- Only 21% of the U.K. population feel that ‘the worst has passed’ in relation to COVID-19, the lowest levels yet recorded.
- 41% think the worst is still to come, significantly higher than any previous week of research.

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



Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757

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

- 15% of U.K. residents believe life will return to 'something close to normal' by September; a figure that continues to drop and is now half of what it was 5 weeks ago. 35% think something close to normality will return by December, a significant fall on last week.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 7, UK

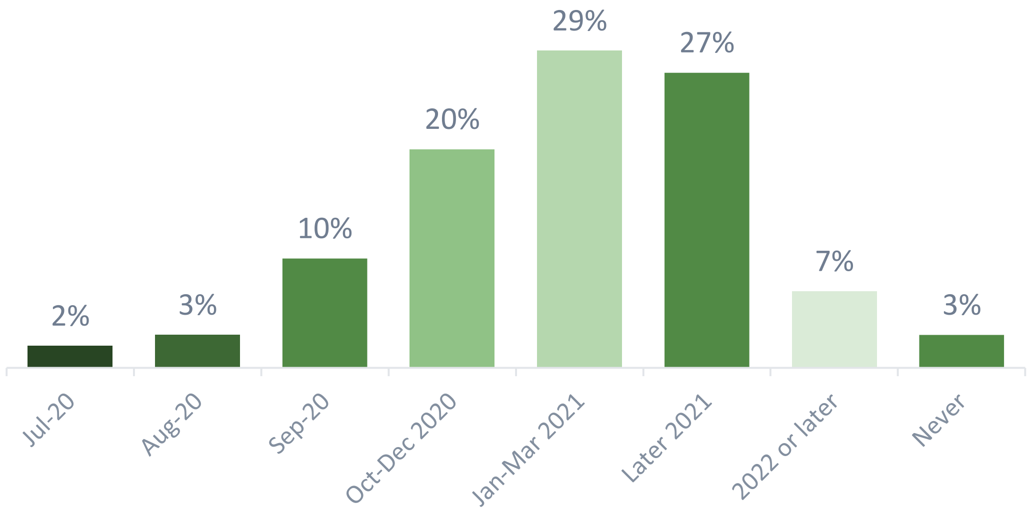


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

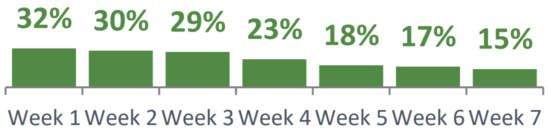
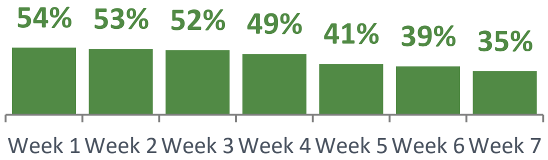


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

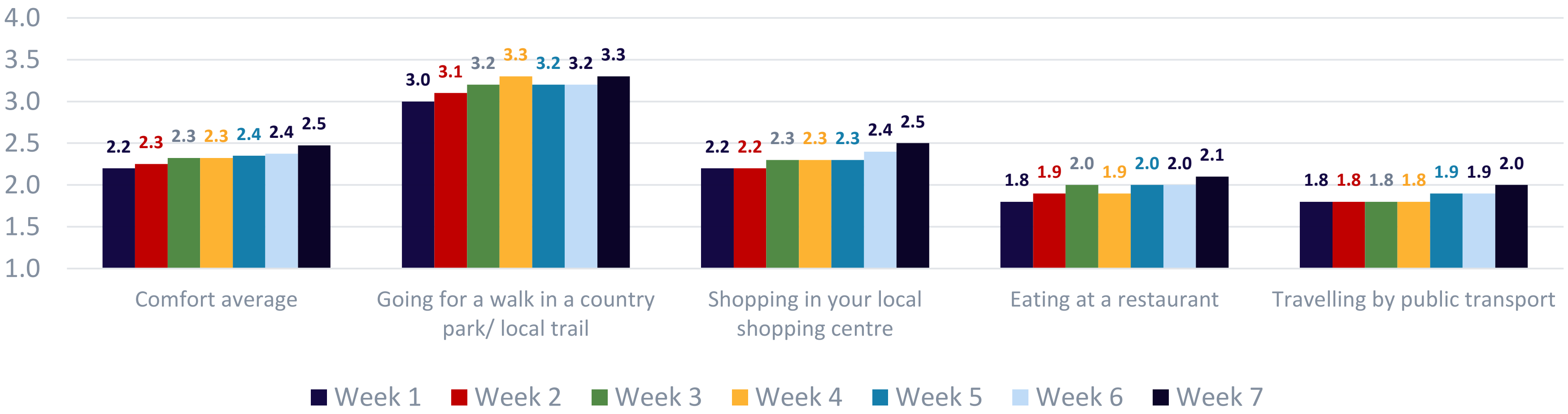


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757

Appetite for Risk

- The ‘appetite for risk’ score stands at 2.5 out of 4 (4 representing ‘very comfortable’), the highest achieved thus far.
- All four activities record their highest levels of comfort since the survey began.

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; Week 6 n=1,756; Week 7 n=1,757

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

- The proportion of Britons that are confident they would be able to take a U.K. short break or holiday in July (21%) has increased significantly on week 6 (14%). This increase is driven by those who are *very* confident in July rising from 2% in week 6 to 8% in week 7.
- Subsequent time periods are largely consistent with what's been reported in previous weeks.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 7, 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 Week 7 respondents n=1,757

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

- ‘Concerns about catching COVID-19’ is the leading reason for the U.K. public not feeling confident about travelling between July and September this year (46% of those not confident stating this), followed by ‘fewer opportunities to eat/drink out’ (44%). ‘Restrictions on travel from government’ (41%) is third in the list.
- From October onwards, ‘concerns about catching COVID-19’ is the leading reason again but with a higher proportion stating it at 53%. All other reasons elicit significantly lower levels of endorsement.

Figure 8. Top 5 reasons for not being confident about travelling between July to September, Percentage Week 7, UK

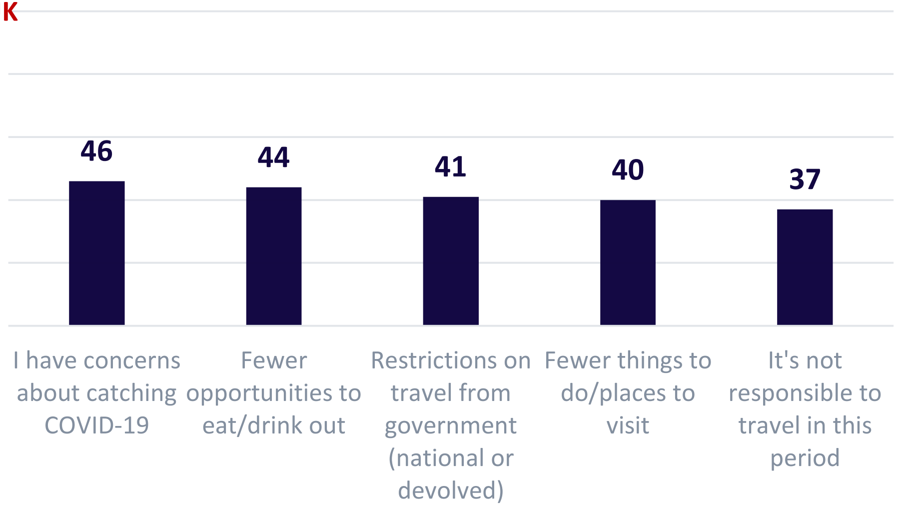
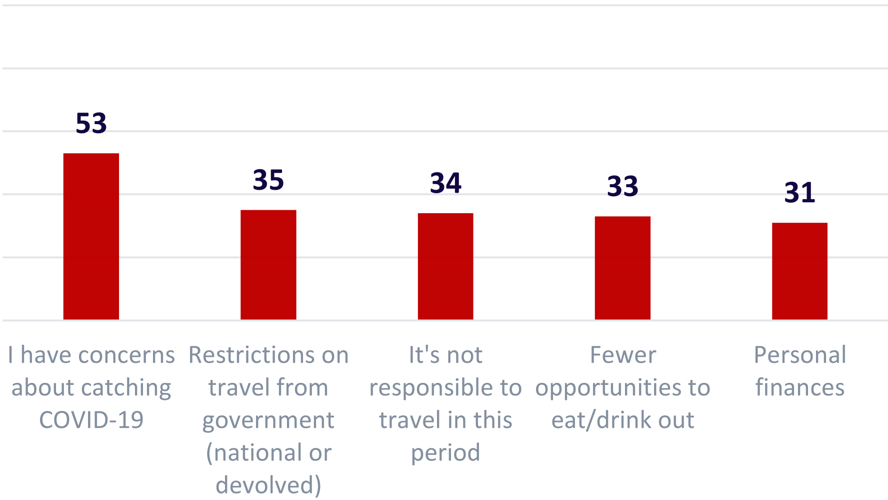


Figure 9. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 7, UK



QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Week 7 respondents not confident about taking a break between July and September n=915 and from October onwards n=612.

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

- Compared to normal, the public anticipates taking fewer short breaks (net -23) and holidays of 4+ nights (net -27) in the UK between now and the end of 2020. The net anticipation for both types of domestic trip is consistent with week 6.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 7, UK

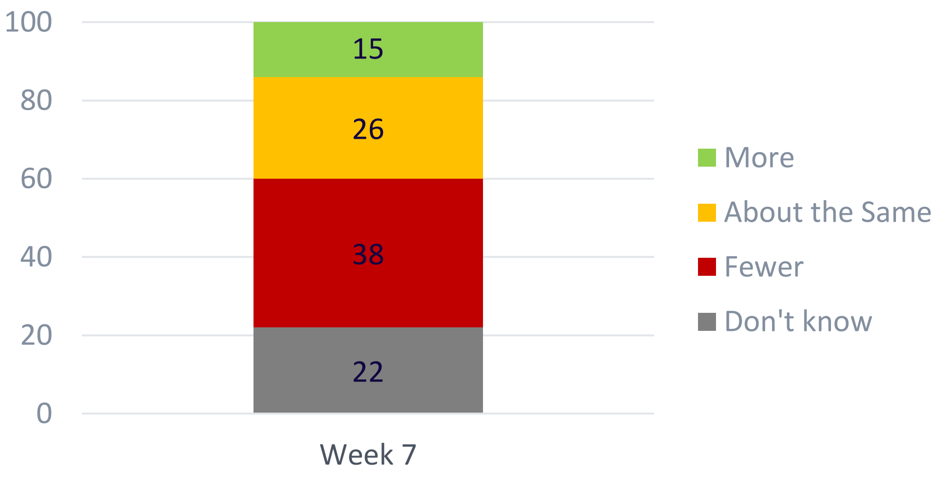
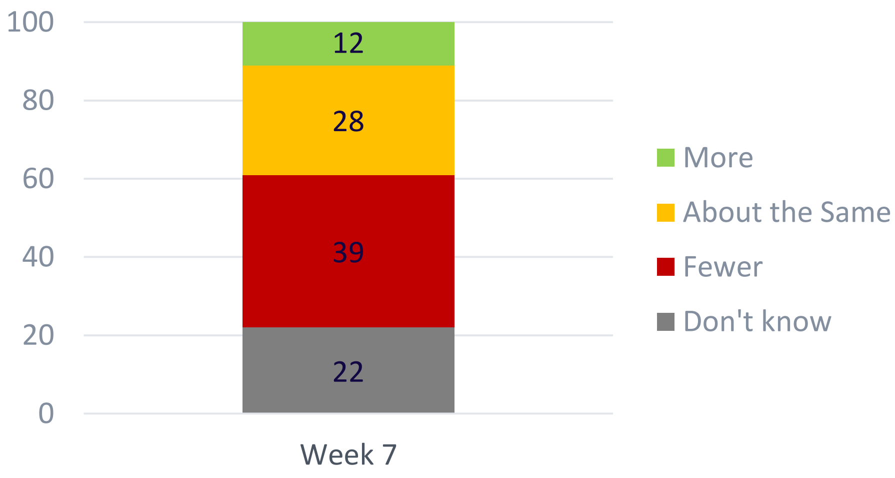


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 7, UK



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 7 respondents n=1,757

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults anticipate taking fewer overseas short breaks (-38) and holidays (-36) by the end of the year compared to normal.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 7, UK

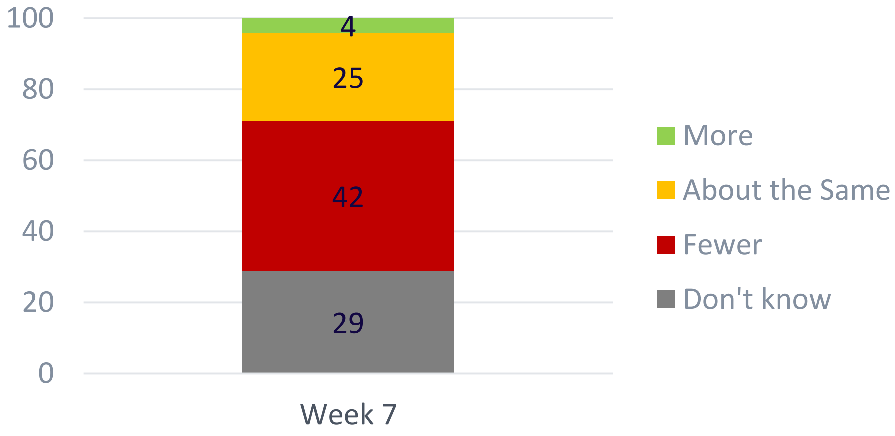
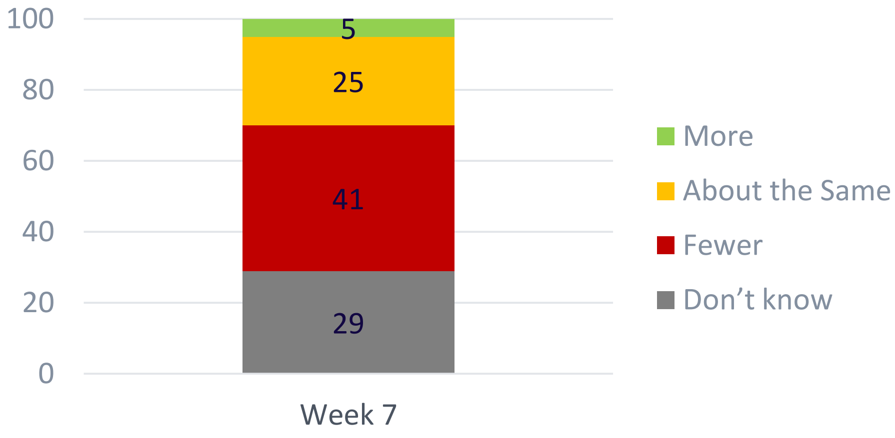


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 7, UK



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 7 respondents n=1,757

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

- 44% have either already planned or intend to plan a U.K. short break or holiday by September, an increase on week 6 (41%). 37% have already booked or intend to book their trip by this time (compared to 36% in week 6)

Figure 14. When anticipate PLANNING next UK holiday or short break, Percentage Week 7, UK

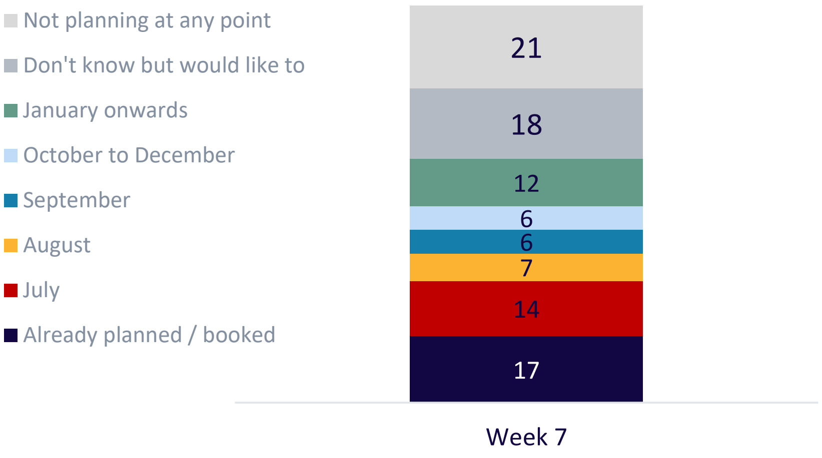
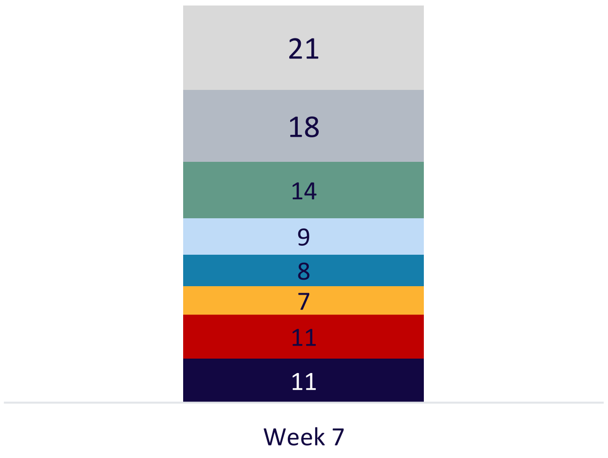


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 7, UK



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 7 respondents n=1,757

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

- 25% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, slightly higher than the proportion intending to do so in week 6 (24%), and the highest total seen so far.
- 20% plan on taking their next UK trip between October and March, whilst 19% would like to take a trip but are unsure when they will do so.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 7, UK

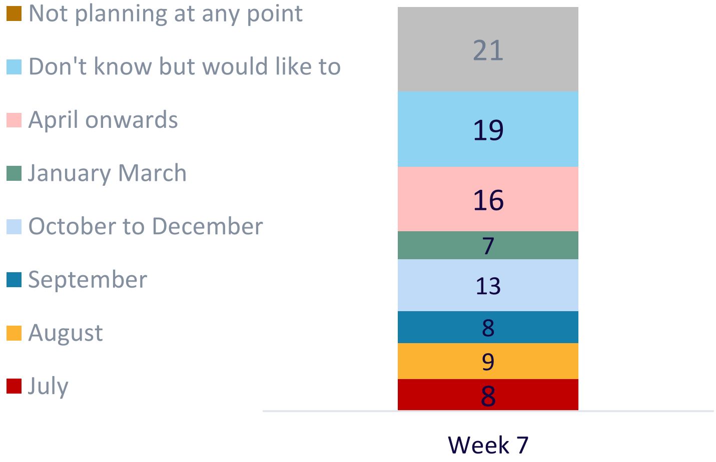
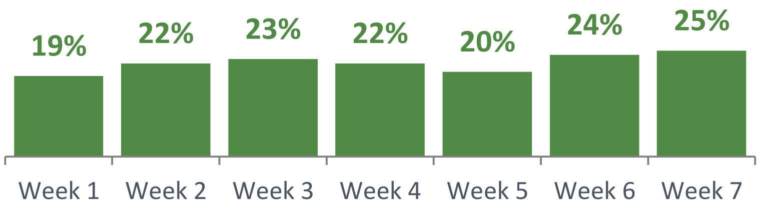


Figure 17. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK

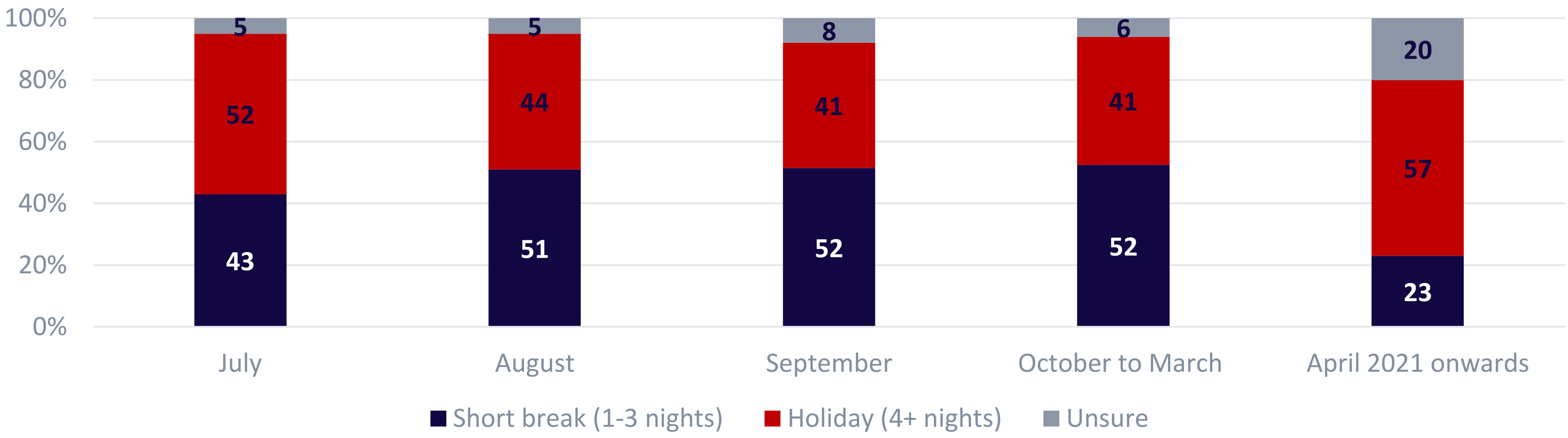


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757 Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757

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

- Holidays of 4+ nights make up the majority of U.K. trips in July and again from April 2021 onwards (although this is largely driven by trips from Spring/Summer 2021). In August, September and between October to March, trips are more likely to be short-breaks.

Figure 18. Length of next UK holiday or short break by time period, Percentage Week 7, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 7 respondents intending to take next holiday in each time period July n=133, August n=144, September n=142, October to March n=349; April onwards n=283

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

- The South West is still significantly more likely than any other U.K. region to generate short break and holiday visitors between July and September this year (19% intending to visit). The South West is followed by Scotland (13%) and then 5 regions that generate interest from between 9% and 12% of those planning a domestic trip during this period.
- The South West of England, Scotland, and London are the parts of the UK most likely to generate short breaks and holidays from October onwards.

Figure 19. Where planning on staying on next UK overnight trip in <u>July to September</u>, Percentage Week 5-7 merged data, Top 10, UK

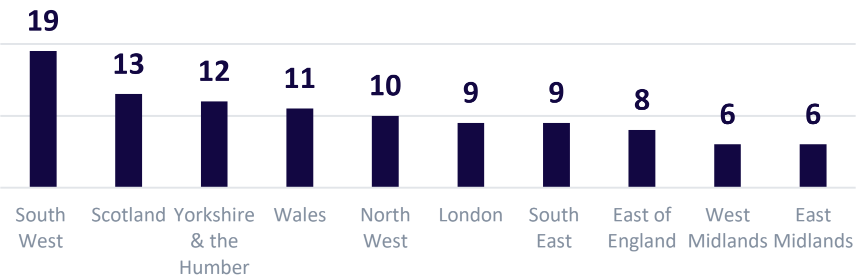
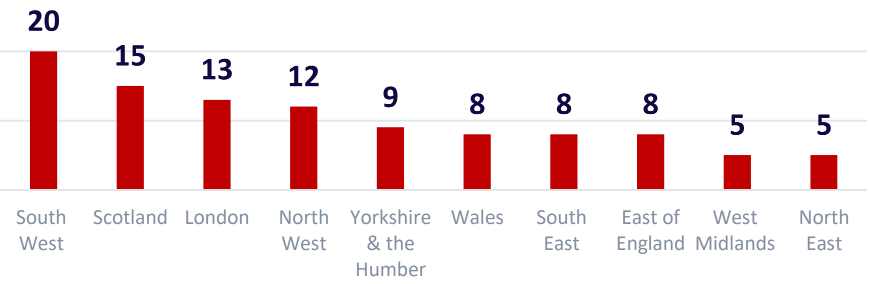


Figure 20. Where planning on staying on next UK overnight trip <u>from October onwards</u>, Percentage Week 5-7 merged data, Top 10, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 5-7 respondents planning on taking a holiday or short break in the UK between July and September n=1,163 and from October onwards n=1,958. 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 still by far the leading mode of transport. Train is the second most preferred mode across both periods, although falls below 1 in 10 between July and September, followed by plane.

Figure 21. Top 5 main modes of travel of destination for trip in July to September, Percentage Week 7, UK

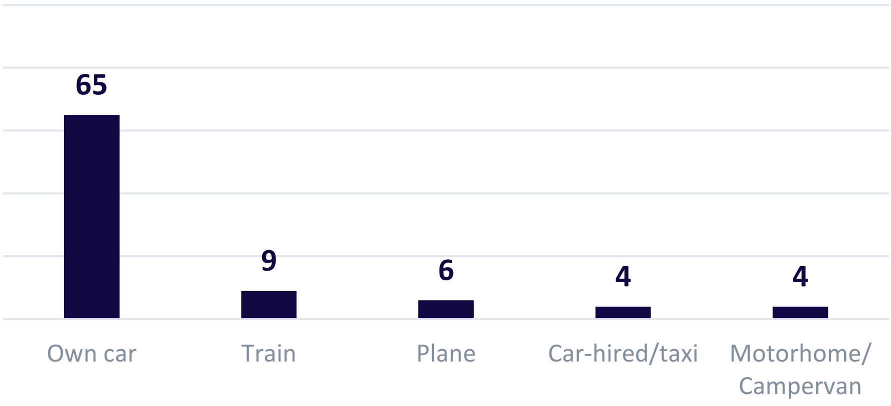
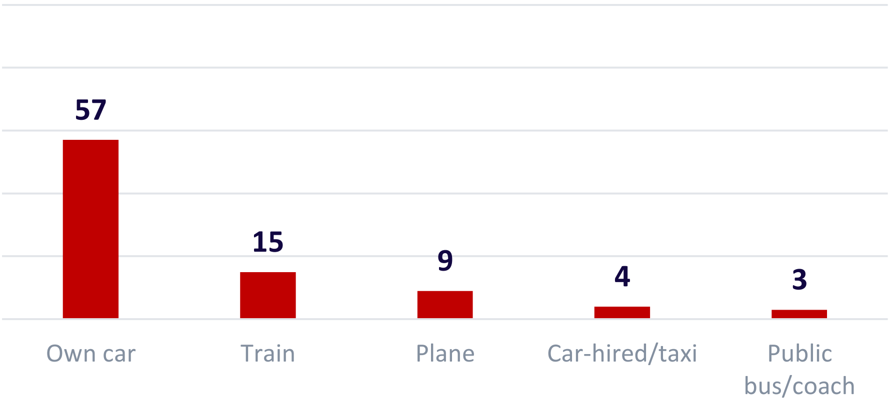


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 7, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 7 respondents planning on taking a holiday or short break in the UK between July and September n=419 and from October onwards n=632

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

- ‘Countryside or village’ and ‘traditional coastal/seaside town’ (both 33%) are the two main destination types for a trip between July and September. ‘City or large town’ (23%) and ‘rural coastline’ (21%) are the next most preferred destination types although significantly less so.
- From October onwards, ‘countryside or village’ (31%), ‘city or large town’ (30%) and ‘traditional coastal/seaside town’ (28%) are the three preferred destination types. ‘City or large town’ is significantly more likely to be selected from October onwards than from July to September.

Figure 23. Main type of destination for trip in July to September, Percentage Weeks 5-7 merged data, UK

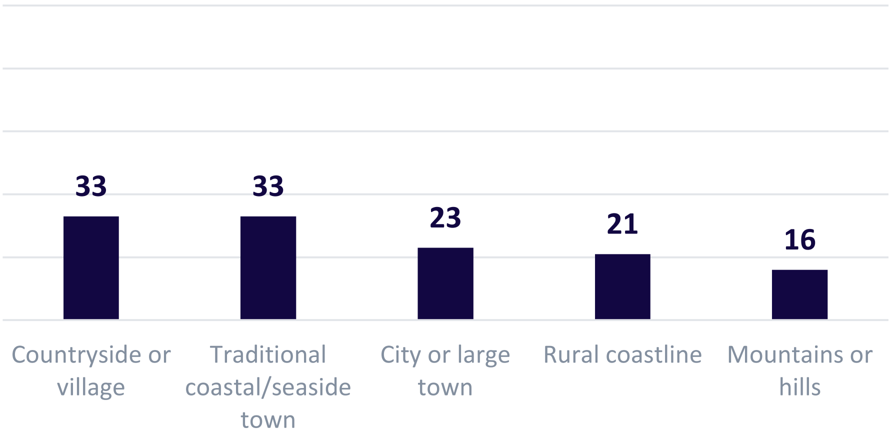
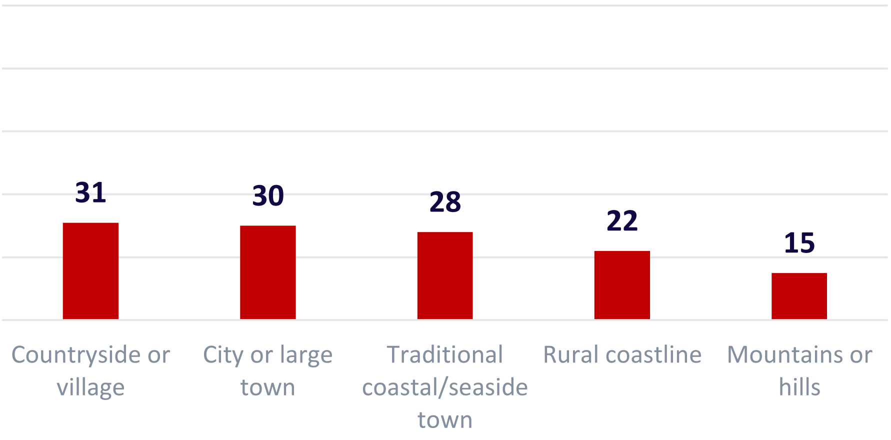


Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 5-7 merged data, UK



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 5-7 respondents planning on taking a holiday or short break in the UK between July and September n=1,163 and from October onwards n=1,958.
Three weeks of research merged to increase statistical reliability

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

- There remains a very even split in the types of accommodation people are likely to use on their trips between July and September – only one percentage point splitting 'caravan/camping' (36%), private home' (35%), 'hotel/motel/inn' (35%), 'and 'commercial rental' (35%).
- From October onwards, 'hotel/motel/inn' (41%) is more likely to attract visitors than any other accommodation type. 'Commercial rental' (40%) and 'private home' (38%) are just behind as the next preferred accommodation types for trips in this period with comfortably over a third selecting them.

Figure 25. Accommodation planning on staying in on next UK overnight trip in July to September, Net percentage Weeks 5-7 merged data, UK

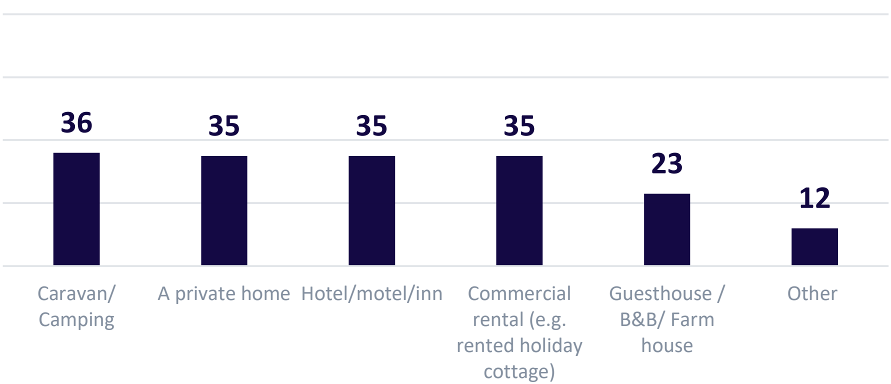
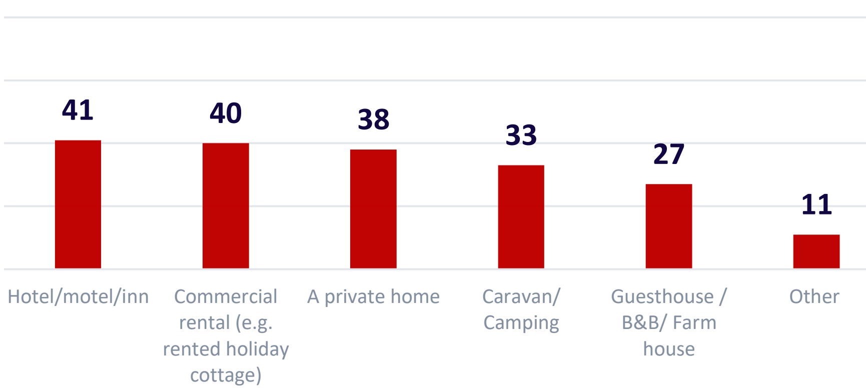


Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Weeks 5-7 merged data, UK

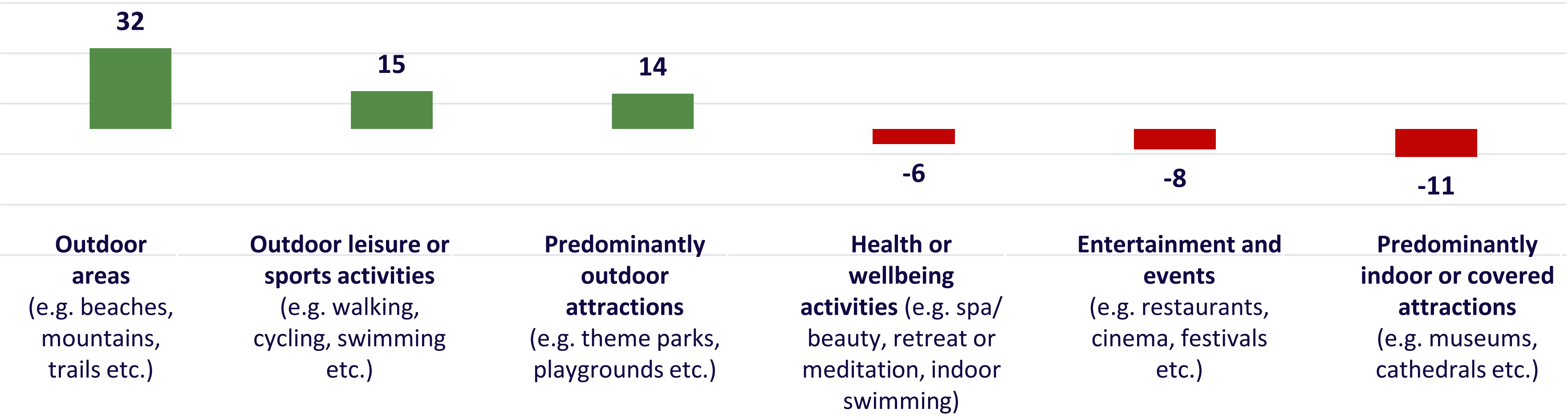


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 5-7 respondents planning on taking a holiday or short break in the UK between July and September n=1,163 and from October onwards n=1,958. Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +32), followed by outdoor leisure or sports activities (net +15) and outdoor attractions (net +14).
- Health or wellbeing activities (net -6), entertainment and events (net -8), and indoor attractions (-11) are likely to attract fewer visitors/engagement than normal but have all slightly improved on week 6.

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 7, UK

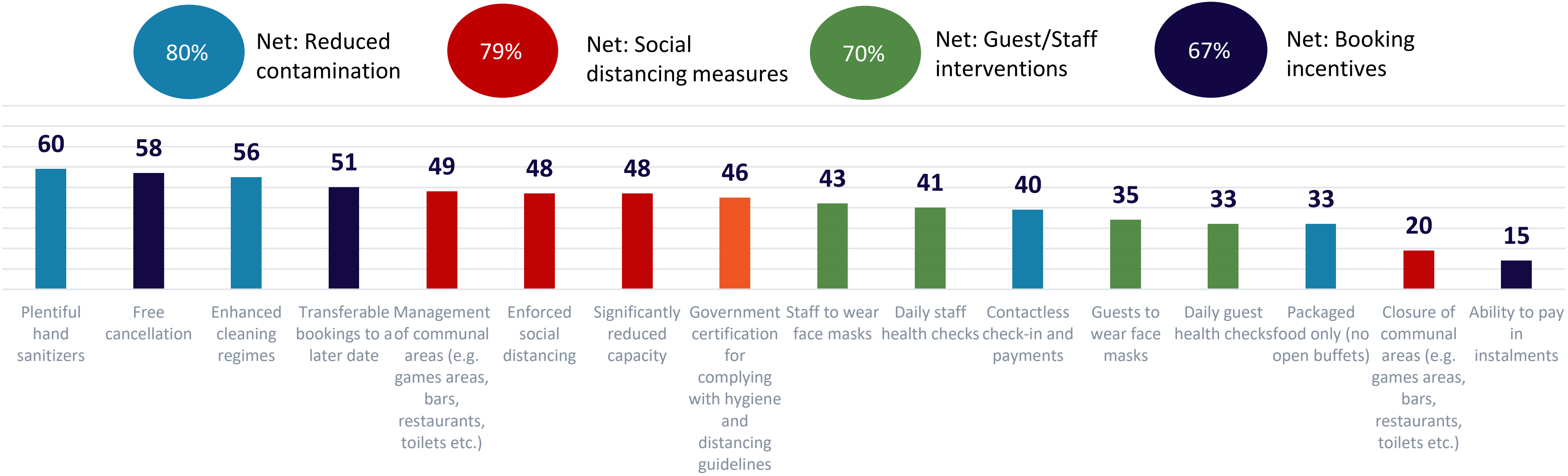


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All respondents Week 7 n=1,757

Conditions essential for people to stay in accommodation this summer

- Steps to reduce cross-contamination (80%) and ensure social distancing (79%) are the biggest reassurances the public need when planning a stay in paid-for accommodation. These are followed by guest/staff interventions (70%) and ‘Booking incentives’ (67%).

Figure 28. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 7, UK



Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them this summer? Base: All summer intenders n=419

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 7 of the COVID-19 consumer weekly tracker, with comparisons to previous weeks where appropriate.
- Week 7 fieldwork was conducted between 29th June to 3rd July 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.