COVID-19 Consumer Weekly Tracker

Week 10

Fieldwork Period: 20 July – 24 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 10: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 9	Week 10	Weekly Shift
National mood (average score out of 10)	6.7	6.7	0
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	20%	23%	+3*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.50	2.58	+0.08
Normality score (proportion expecting normality by September)	9%	8%	-1
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 9	Week 10	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% more/the same)	44%	46%	+2
Anticipated number of U.K. holidays compared to normal (% more/the same)	40%	43%	+3
UK near-term holiday/short break confidence (July/August/Sept. confident)	26%/33%/43%	24%/32%/40%	-2/-1/-3
UK medium-term holiday/short break confidence (Oct-Dec confident)	50%	45%	-5
Proportion going/been on a UK short break *or* holiday between July-Sept	33%	32%	-1
Split between holiday / short break / don't know for next trip between July-Sept	45%/52%/2%	45%/51%/4%	0/-1/+2

Week 10: 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 9	Week 10	Weekly Shift
Leading England destination likely to stay in between July – Sept	South West	South West	No change
Main *type* of destination likely to stay in between July – Sept	Countryside or village	Countryside or village/Traditional coastal or seaside town	Joint no. 1
Main accommodation type likely to stay in between July - Sept	Caravan/camping	Caravan/camping	No change

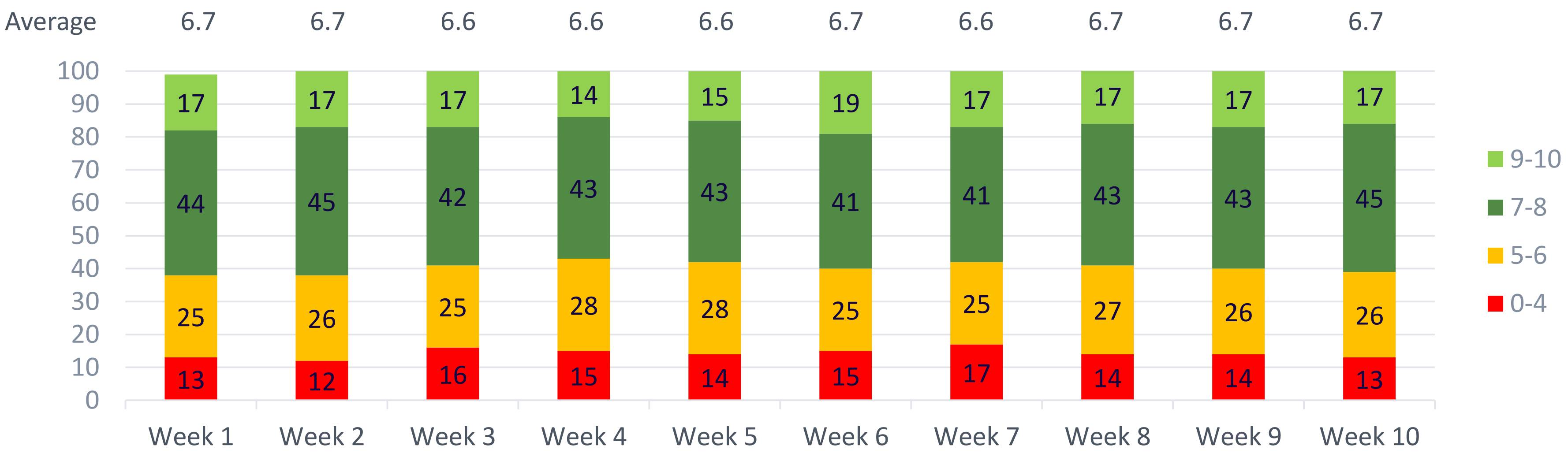
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 9	Week 10	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 6.7 out of 10, consistent the previous weeks of research
- There has been virtually no change in the national mood over the last 2 weeks

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

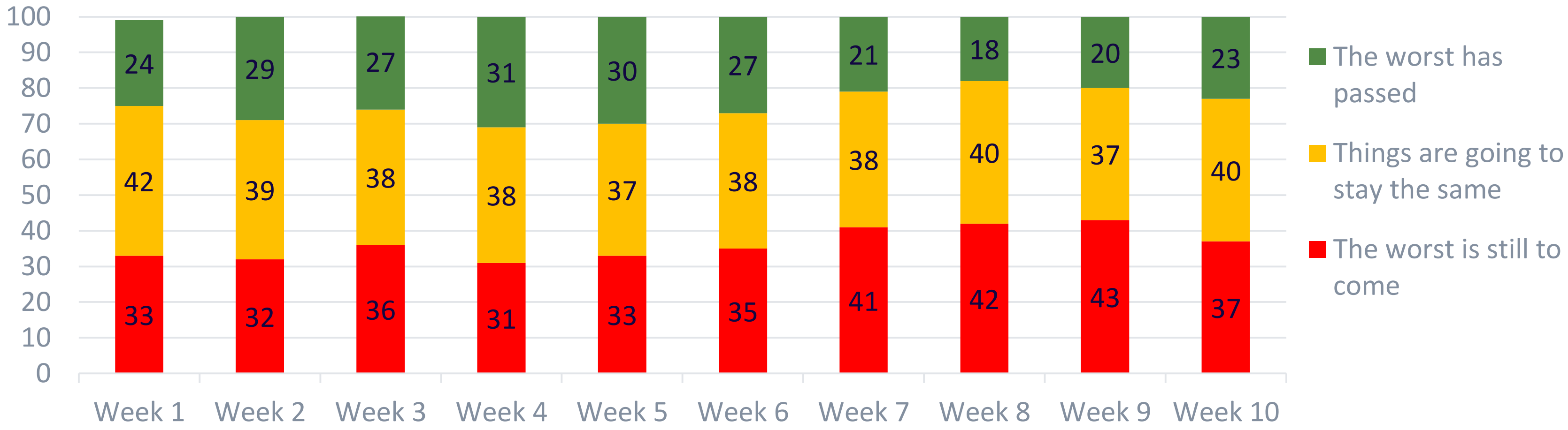


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759; Week 10 n=1,761

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

- 23% of the U.K. adult population feel ‘the worst has passed’ in relation to COVID-19. While still a minority view, this percentage has increased for two consecutive weeks. 40% think that ‘things are going to stay the same’ which also represents an increase on last week, meaning the proportion believing ‘the worst is still to come’ has declined significantly.

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; Week 8 n=1,757; Week 9 n=1,759; Week 10 n=1,761

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

- Fewer than 1 in 10 U.K. adults believe that life will return to 'something close to normal' by September; a statistic that has consistently fallen since Week 1 of the research. However, 27% expect some level of normality to return by December, a higher proportion than last week and the first rise in ten weeks of research.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 10, UK

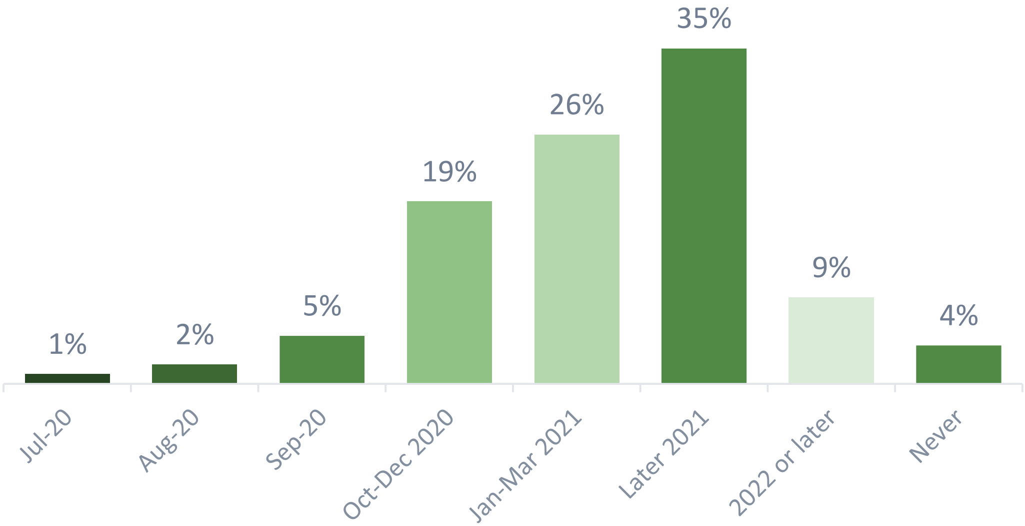


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

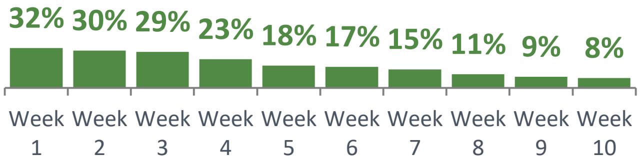
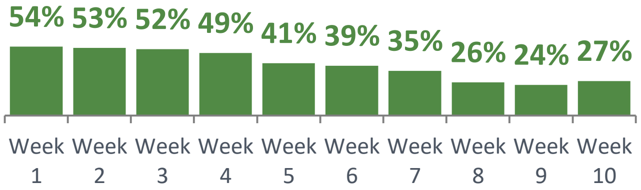


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

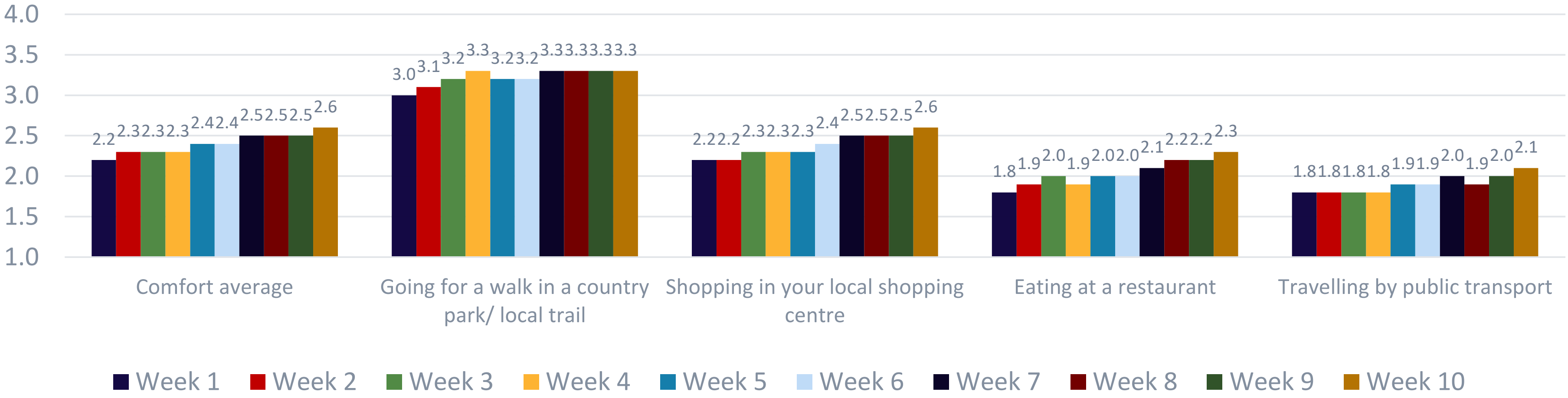


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757; Week 3 n=1,753; Week 4 n=1,746; Week 5 n=1,739; Week 6 n=1,756; Week 7 n=1,757; Week 8 n=1,757; Week 9 n=1,759; Week 10 n=1,761

Appetite for Risk

- The ‘comfort average’ has climbed to 2.6 out of 4 (4 representing ‘very comfortable’), the highest score to date.
- Comfort scores have increased by a decimal point for all activities, with the exception of ‘going for a walk in a country park’ which has the highest score at 3.3 and has remained level for the past 4 weeks.

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; Week 8 n=1,757; Week 9 n=1,759; Week 10 n=1,761

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

- Around a third (32%) of U.K. adults are very or fairly confident they would be able to take a domestic short break or holiday in August.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 10, UK

Figure 8. Confidence in taking a UK short break or holiday in August, Percentage week-on-week, UK

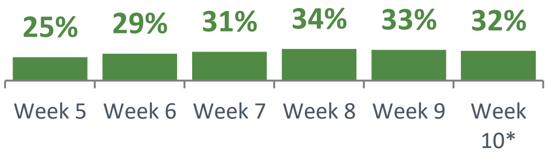
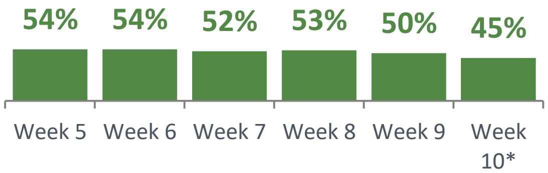


Figure 9. Confidence in taking a UK short break or holiday in October - December, Percentage week-on-week, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the five 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 10 respondents n=1,761 *Note: Slight change in questionnaire wording in week 10 – results are indicative only

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

- ‘Concerns about catching COVID-19’ remains the leading reason for not feeling confident about travelling between July and September this year’ followed by ‘fewer opportunities to eat/drink out’ and ‘fewer things to do/places to visit (both on 42%) and ‘personal finances’ (36%).
- From October onwards, ‘concerns about catching COVID-19’ is the leading reason by a significant margin, with 55% stating this.

Figure 10. Top 5 reasons for not being confident about travelling between July to September, Percentage Week 10, UK

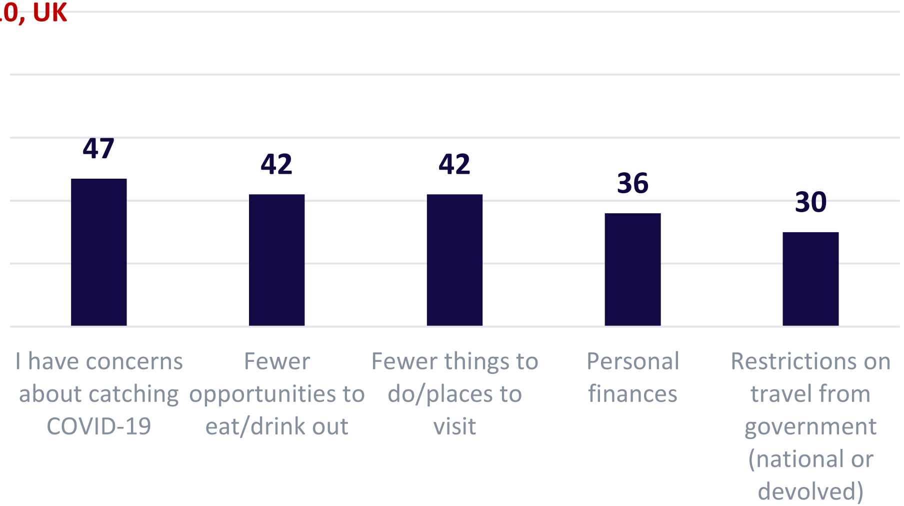
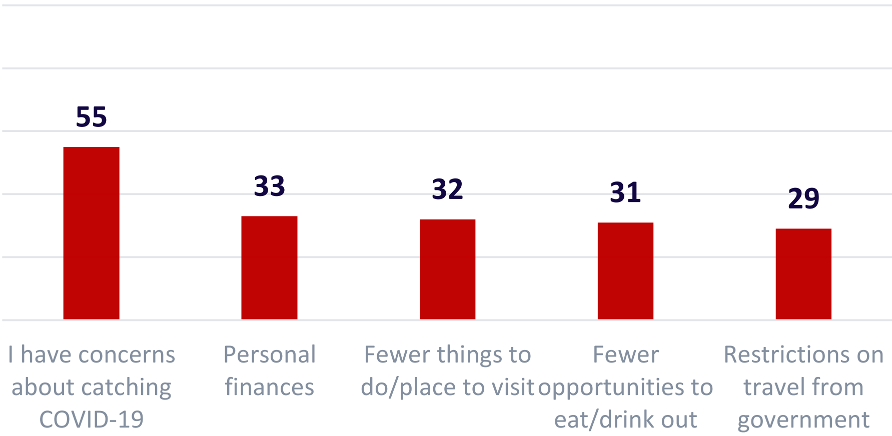


Figure 11. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 10, UK



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 10 respondents not confident about taking a break between July and September n=398 and from October onwards n=589.

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

- The proportion expecting to take more or the same amount of U.K. short breaks or holidays compared to normal has increased since last week.
- 46% intend to take the same amount or more U.K. short breaks (compared to 44% last week), with 43% expressing this for holidays of 4+ nights (40% last week). There has been a gradual shift from people stating they 'don't know' to 'about the same'. The incidence of U.K. residents intending to take *fewer* trips has remained largely consistent.

Figure 12. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 10, UK

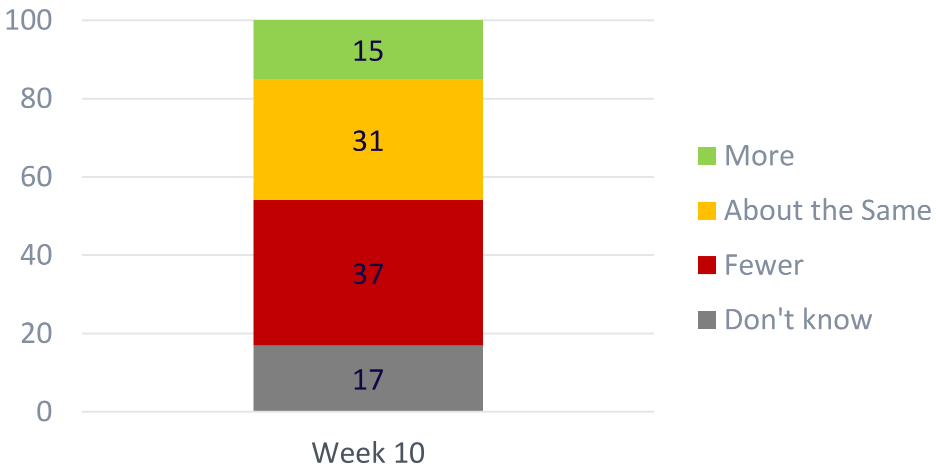
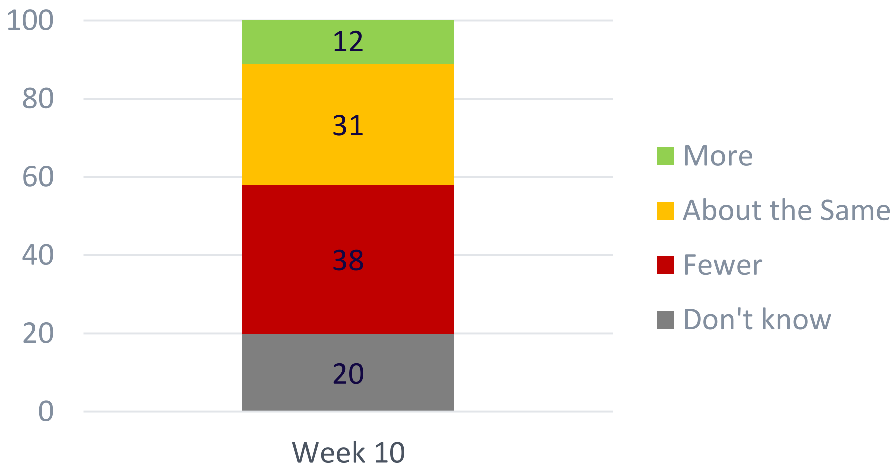


Figure 13. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 10, UK



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 10 respondents n=1,761

Anticipated number of OVERSEAS trips this year compared to normal

- 28% of U.K. adults expect to take more or the same amount of overseas short breaks compared to normal and 29% for holidays of 4 nights or more.

Figure 14. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 10, UK

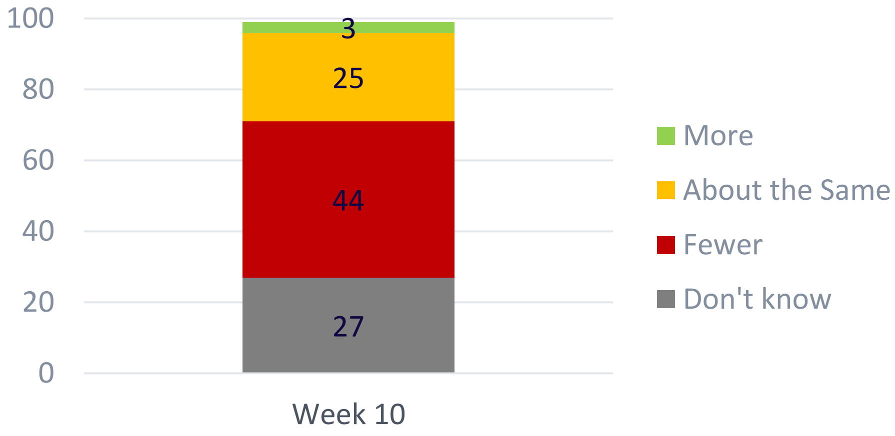
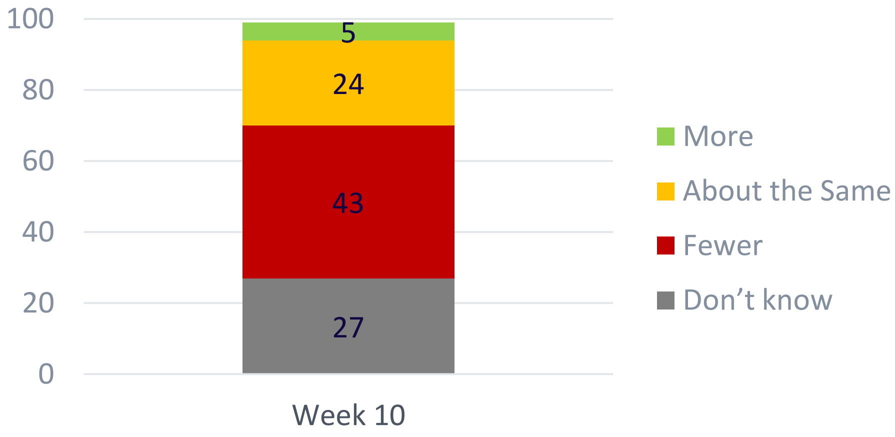


Figure 15. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 10, UK

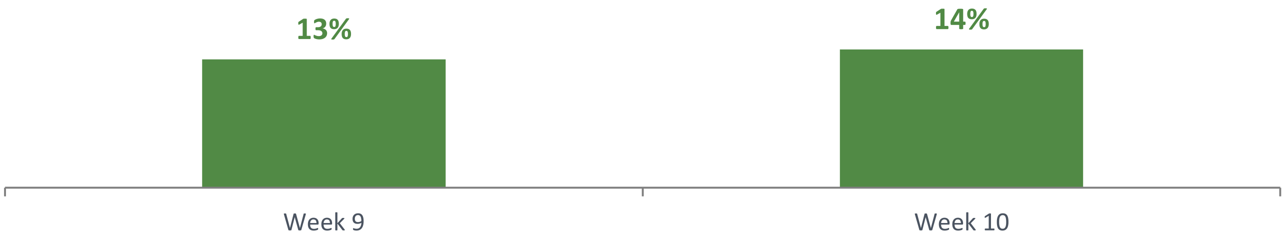


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All Week 9 respondents n=1,759

How many have already been on a U.K. short break or holiday

- 14% of U.K. adults say the *have already been* on a U.K. short break or holiday in July, a slight rise on the proportion stating this in week 9.

Figure 16. Proportion that have already been on a trip in July, Percentage week-on-week, UK



QVB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK during July?
Base: All respondents. Week 9 n=1,759; Week 10 n=1,761

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

- 18% have already planned and 13% have already booked their next U.K. short break or holiday, a slight decline on last week.
- 42% have either already planned *or* intend to plan a U.K. short break or holiday by September slightly up on week 9 (40%). 35% have already booked *or* intend to book their trip by this time, consistent with week 9 (also 35%)

Figure 17. When anticipate PLANNING next UK holiday or short break, Percentage Week 10, UK

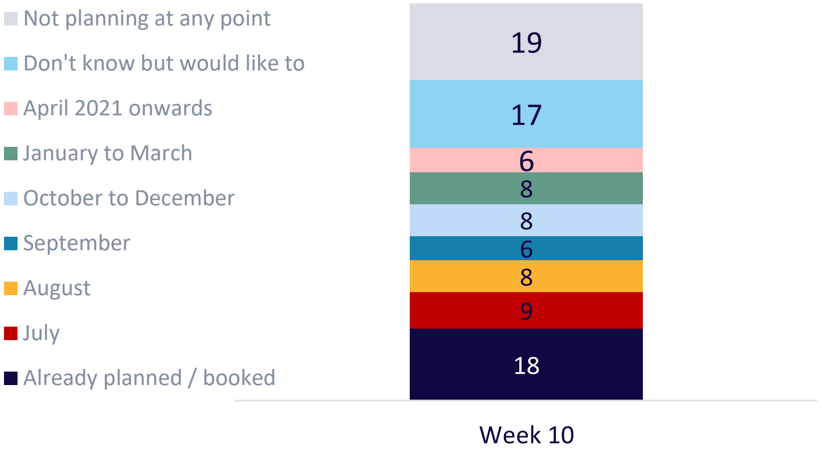
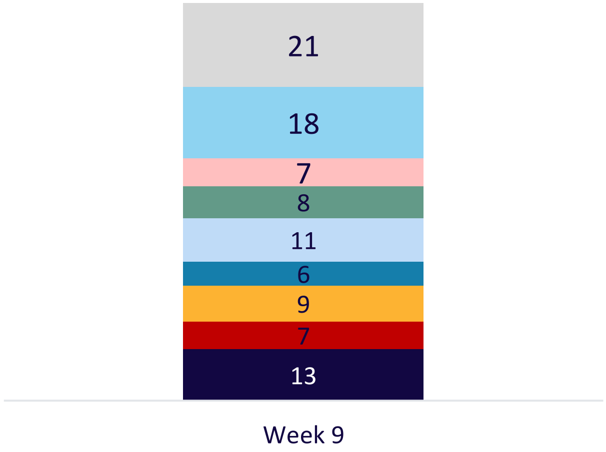


Figure 18. When anticipate BOOKING next UK holiday or short break, Percentage Week 10, UK



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 10 respondents n=1,761

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

- 23% of U.K. adults anticipate *going* on their next U.K. short break or holiday by this September, however adding in those who have already been on a trip, the 'July to September' figure rises to 32%, largely consistent with Week 9.
- 22% plan on taking their next UK trip between October and March, whilst 17% would like to take a trip but are unsure when they will do so

Figure 19. When anticipate GOING on next UK trip, Percentage Week 10, UK

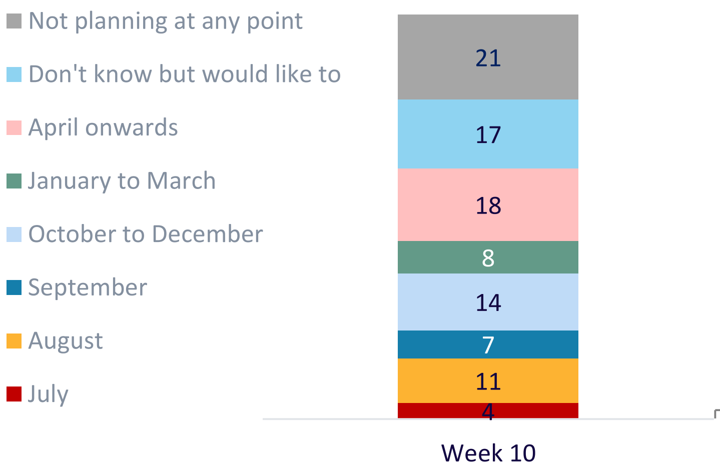
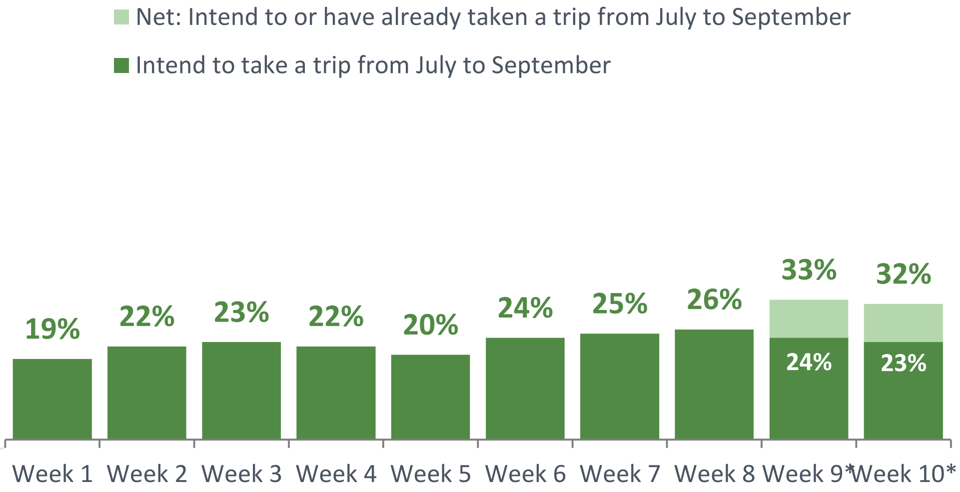


Figure 20. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK



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? VB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK during July?
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; Week 8 n=1,757; Week 9 n=1,759, Week 10 n=1,761. *Light shade is percentage who have already been on a trip this summer.

Proportion that have already planned or booked their next U.K. holiday or short break

- Half of those who intend to take a trip this summer claim to have already planned it with just over a third saying they have already booked it.
- For those intending to take a trip between October 2020 – March 2021, 19% say they have already planned it and 12% have booked it.

Figure 21. Proportion of Intenders that have already *planned* their trip , Percentage Week 10, U.K.

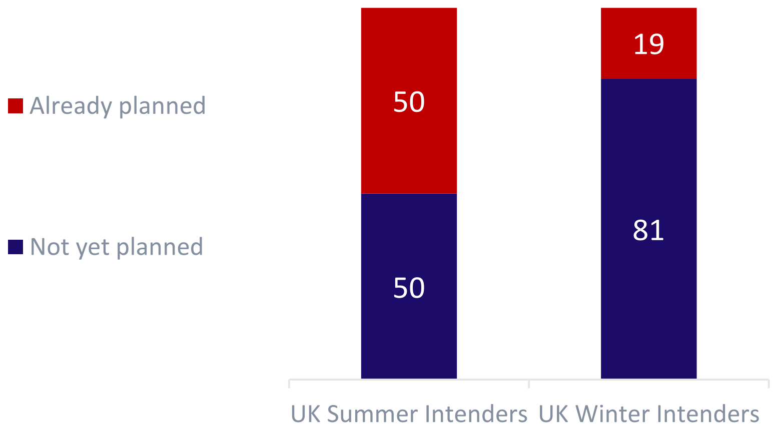
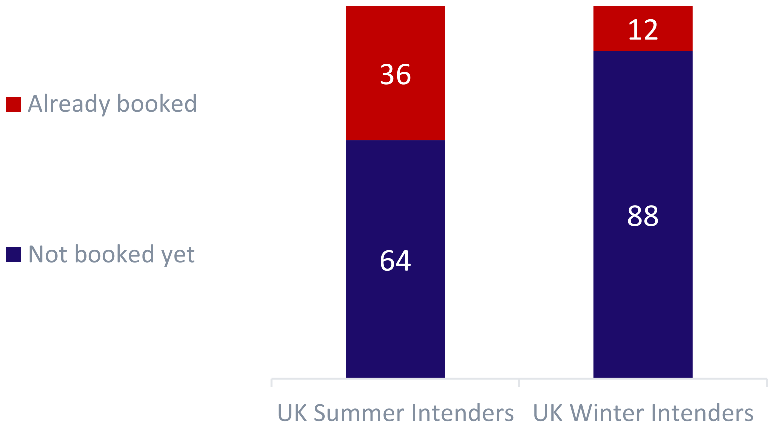


Figure 22. Proportion of Intenders that have already *booked* their trip Percentage Week 10, U.K.

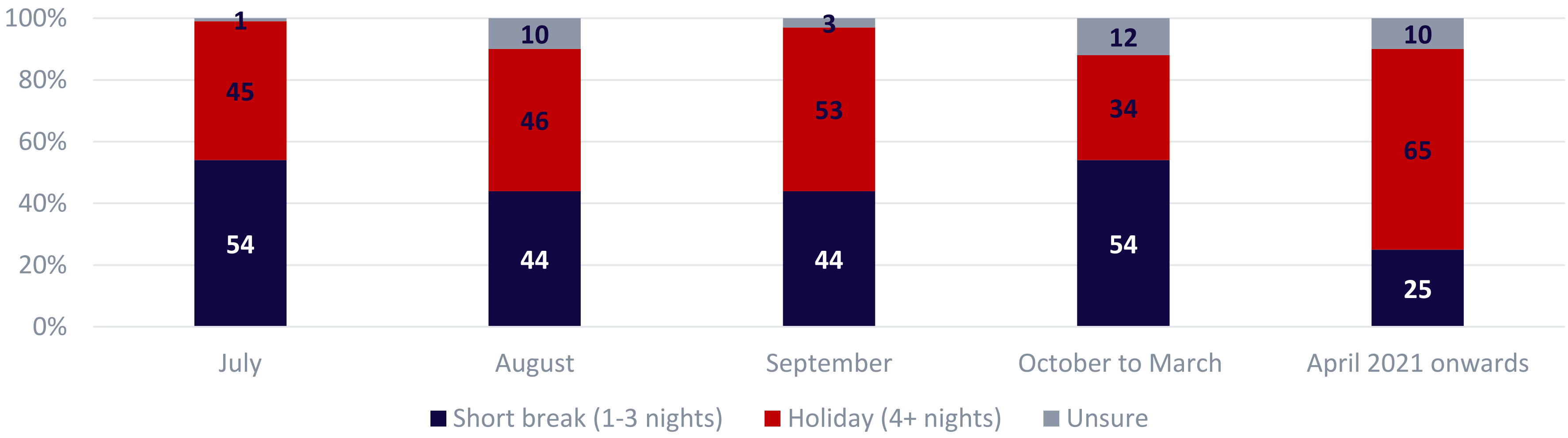


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All week 10 respondents planning on taking a holiday or short break in the UK between July and September n=391 and from October to March n=373

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

- In July, trips are more likely to be short breaks than holidays of 4+ nights. There is a relatively even split in August, whilst in September holidays of 4+ nights are slightly more dominant. Between October 2020 and March 2021, short breaks become increasingly prevalent.

Figure 23. Length of next UK holiday or short break by time period, Percentage Week 10, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 10 respondents intending to take next holiday in each time period July n=81, August n=181, September n=129, October to March n=373; April onwards n=310

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

- The South West is significantly more likely than any other U.K. region to receive short break and holiday visitors between July and September this year (21% intending to visit). This is followed by Scotland (12%) and the North West (11%).
- London more than doubles its share during the winter period, moving into joint first place with the South West on 16%.

Figure 24. Where planning on staying on next UK overnight trip in July to September, Percentage Weeks 8-10 merged data, UK

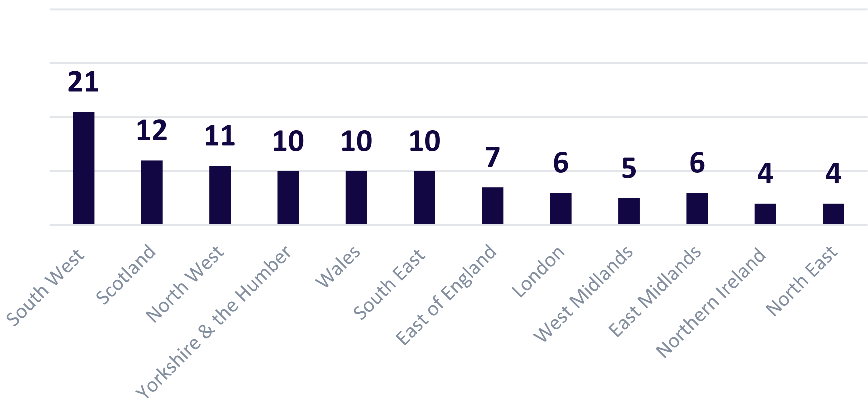
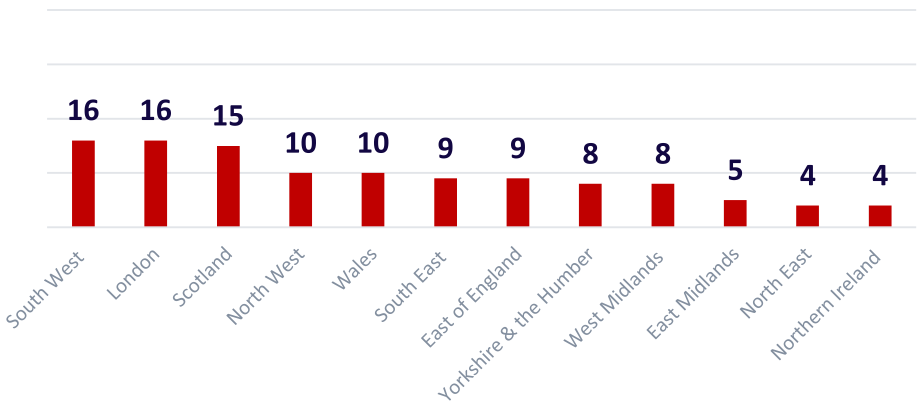


Figure 25. Where planning on staying on next UK overnight trip from October to March, Percentage Weeks 8-10 merged data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 8-10 respondents planning on taking a holiday or short break in the UK between July and September n=1,253 and from October to March n=1,071. 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 although significantly more so between July and September. Train is the second most preferred mode across both periods

Figure 26. Top 5 main modes of travel to destination for trip in July to September, Percentage Week 10, UK

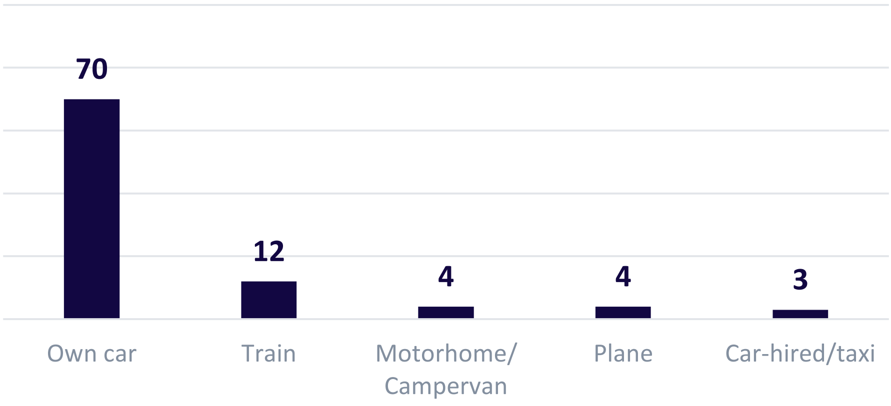
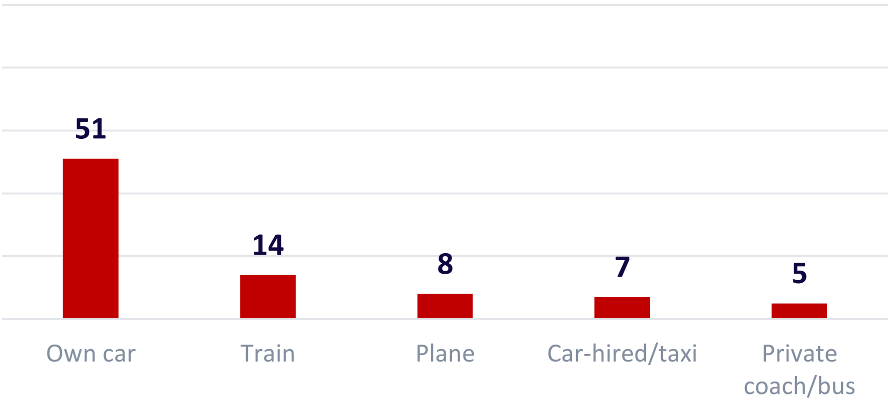


Figure 27. Top 5 main modes of travel to destination for trip from October to March, Percentage Week 10, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 10 respondents planning on taking a holiday or short break in the UK between July and September n=391 and from October to March n=373

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

- ‘Countryside or village’ (34%) and ‘traditional coastal/seaside town’ (also 34%) are the two main destination types for a trip between July and September. ‘Rural coastline’ (24%) and ‘city or large town’ (20%) are the next most preferred destination types although significantly less so
- Between October and March, ‘city or large town’ (32%) becomes the most preferred destination type, significantly more so than between July and September.

Figure 28. Main type of destination for trip in July to September, Percentage Weeks 8-10 merged data, UK

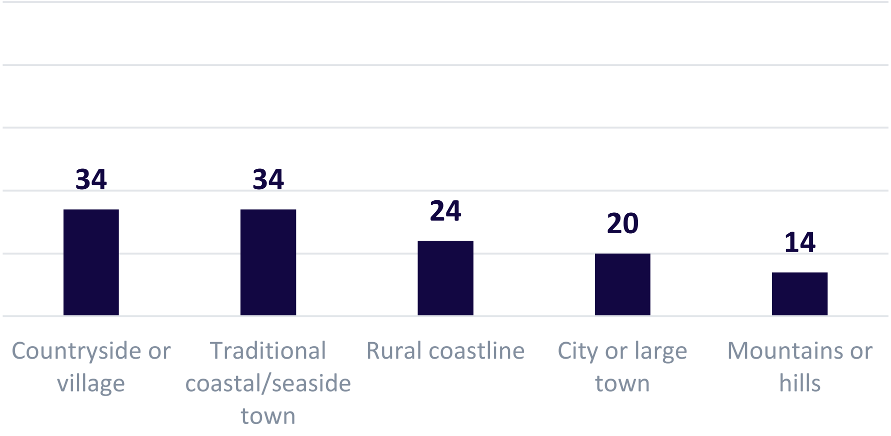
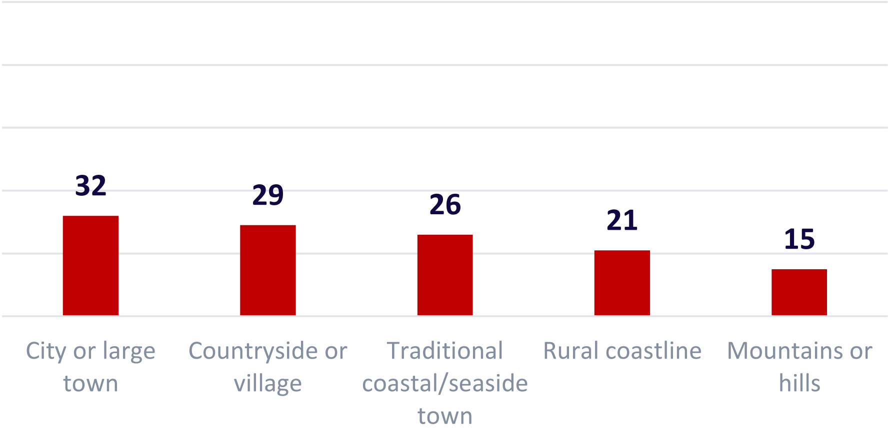


Figure 29. Main type of destination for trip from October to March, Percentage Weeks 8-10 merged data, UK



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 8-10 respondents planning on taking a holiday or short break in the UK between July and September n=1,253 and from October to March n=1,071.
Three weeks of research merged to increase statistical reliability

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

- 'Caravan/camping' remains the most preferred type of accommodation, followed by 'commercial rental' and 'a private home'.
- Between October 2020 and March 2021, 'hotel/motel/inn' (40%) is more likely to attract visitors than any other accommodation type, just ahead of 'a private home' (39%) and 'commercial rental' (38%).

Figure 30. Accommodation planning on staying in on next UK overnight trip in July to September, Net percentage Weeks 8-10 merged data, UK

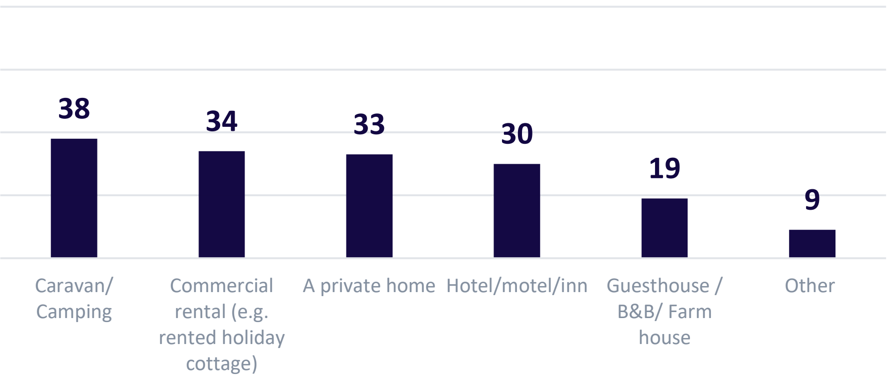
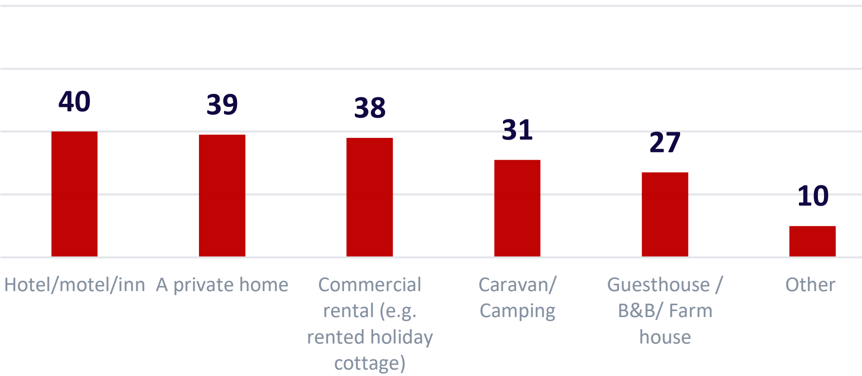


Figure 31. Accommodation planning on staying in on next UK overnight trip from October to March, Net percentage Weeks 8-10 merged data, UK

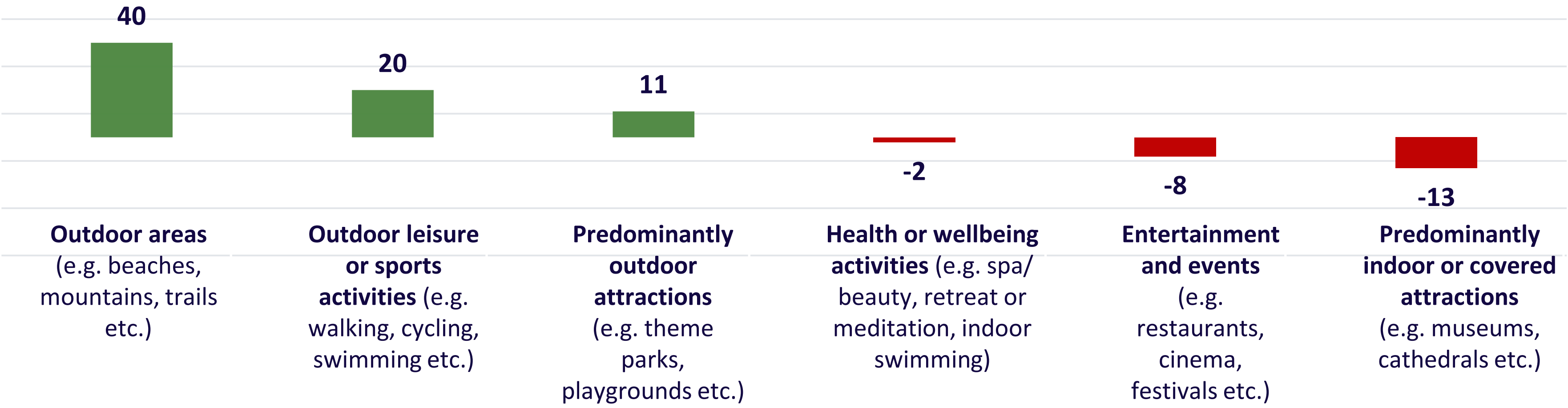


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 8-10 respondents planning on taking a holiday or short break in the UK between July and September n=1,253 and from October to March n=1,071. Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +40), followed by outdoor leisure or sports activities (net +20) and outdoor attractions (net +11). Health or wellbeing activities (net -2), entertainment and events (net -8), and indoor attractions (-13) are likely to attract fewer visitors/engagement than normal.

Figure 32. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 9, UK

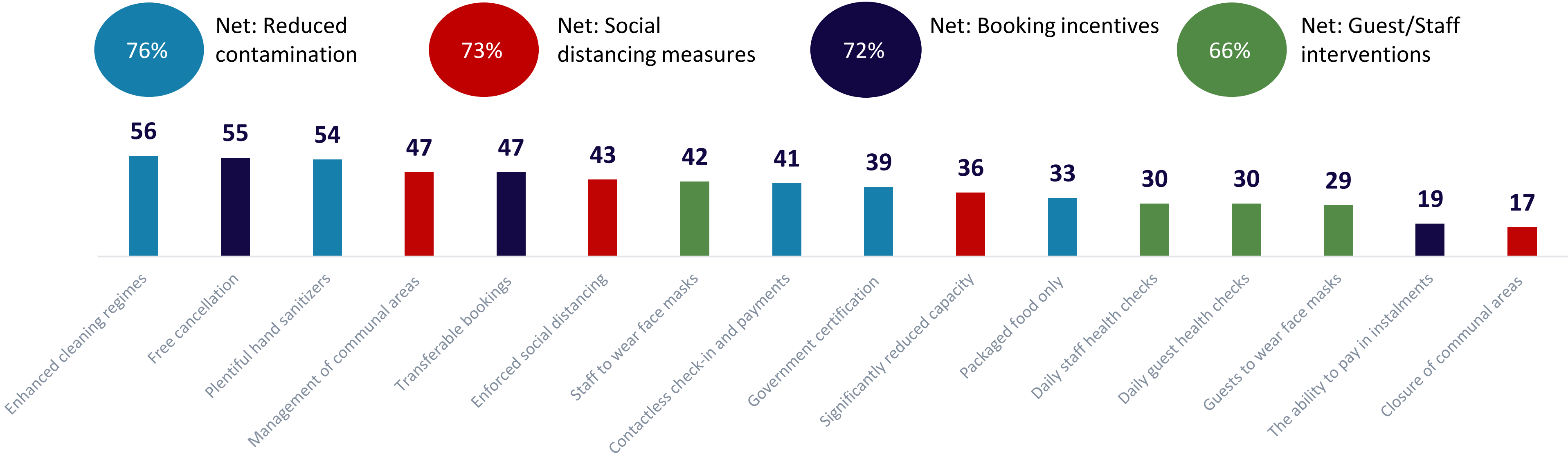


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base:
Base: All Week 10 respondents n=1,761

Conditions essential for people to stay in accommodation this summer

- Measures to reduce contamination (76%), ensure social distancing (73%) and having booking incentives such as free cancellations (72%) are the leading assurances needed by the public when staying in accommodation this summer.

Figure 33. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 9, 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 week 10 summer intenders n=391

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 9 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-9 where appropriate. Week 10 fieldwork was conducted between 20th to 24th 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.