COVID-19 Consumer Tracker

Wave 14

Fieldwork Period: 31 August to 4 September

U.K. Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips 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 results are made publicly available and updated each wave at the following website:

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

Definitions used within this report

In this report we look at the profiles and attitudes of a number of separate audiences depending on whether they have, or intend to, take an overnight domestic trip. For ease of reference, the time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions.

- **Summer Intenders:** Adults resident in the UK who said they intended to take an overnight domestic trip during either July or August.
- **Summer trip-takers:** Adults resident in the UK who claim to have taken an overnight domestic trip, for any purpose, during July or August
- **Summer holiday-takers:** Adults resident in the UK who claim to have taken an overnight domestic trip for the purpose of a *holiday* (i.e. not for primarily visiting friends or relatives, going away on business or travelling for any other reason) during July or August
- **Autumn Intenders:** Residents of the UK who claim their next domestic overnight trip will take place during September or October this year.
- **Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between November 2020 and March 2021.

Note: The data for Summer Intenders is taken from waves 5-8 of this research, which covered fieldwork dates between 15th June and 10th July (i.e. the period just prior to lockdown restrictions on domestic travel being eased).

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 13	10 – 14 August
Wave 2	25 – 29 May	Wave 14	31 August – 4 September
Wave 3	1 – 5 June	Wave 15	
Wave 4	8 – 12 June	Wave 16	
Wave 5	15 – 19 June	Wave 17	
Wave 6	22 – 26 June	Wave 18	
Wave 7	29 June – 3 July	Wave 19	
Wave 8	6 – 10 July	Wave 20	
Wave 9	13 – 17 July	Wave 21	
Wave 10	20 – 24 July	Wave 22	
Wave 11	27 – 31 July	Wave 23	
Wave 12	3 – 7 August	Wave 24	

Wave 14: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous Wave**

Key Metrics	Wave 13	Wave 14	Wave Shift
National mood (average score out of 10)	6.7	6.7	+/-0.0
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	14%	16%	+2
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.63	2.65	+0.02
Normality score (proportion expecting normality by December)	18%	11%	-7*
The main reasons for not feeling confident about taking a trip in Sept-Oct (Top 2)	1. Concerns about catching COVID-19 2. Restriction on travel from gov.	1. Concerns about catching COVID-19 2. Personal finances	New no. 2**

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 13	Wave 14	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	43%	43%	+1
Anticipated number of UK longer breaks compared to normal (% more/the same)	38%	42%	-1
Near-term confidence in taking UK overnight trip (September/October confident)	35%/--	38%/40%	+3*/--
Medium-term confidence in taking UK overnight trip (Nov/Dec confident)	--/--	39%/39%	--/--
Proportion going on a UK overnight trip this Autumn (September/October)	18%	19%	+1
Split between longer break / short break / don't know for Autumn trip	34%/60%/6%	37%/58%/5%	+3/-2/-1

*Please note 3 week gap between Wave 13 and Wave 14. **Wave 13 figures refer to August and September. Wave 14 figures refer to September and October. Where '-' is shown, question not asked in the same format as in previous wave, so data not shown

Wave 14: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

*** Represents a significant change on previous Wave**

Key Metrics	Wave 13	Wave 14	Wave Shift
Leading UK destination likely to stay in between Sept – Oct	South West	South West	No change
Main *type* of destination likely to stay in between Sept – Oct	Traditional coastal/seaside town	Countryside or village	New no. 1
Main accommodation type likely to stay in between Sept – Oct	Hotel/motel/inn	Hotel/motel/inn	No change

Table 4. Top line Metrics – Broader Leisure Activity

Key Metrics	Wave 13	Wave 14	Wave 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

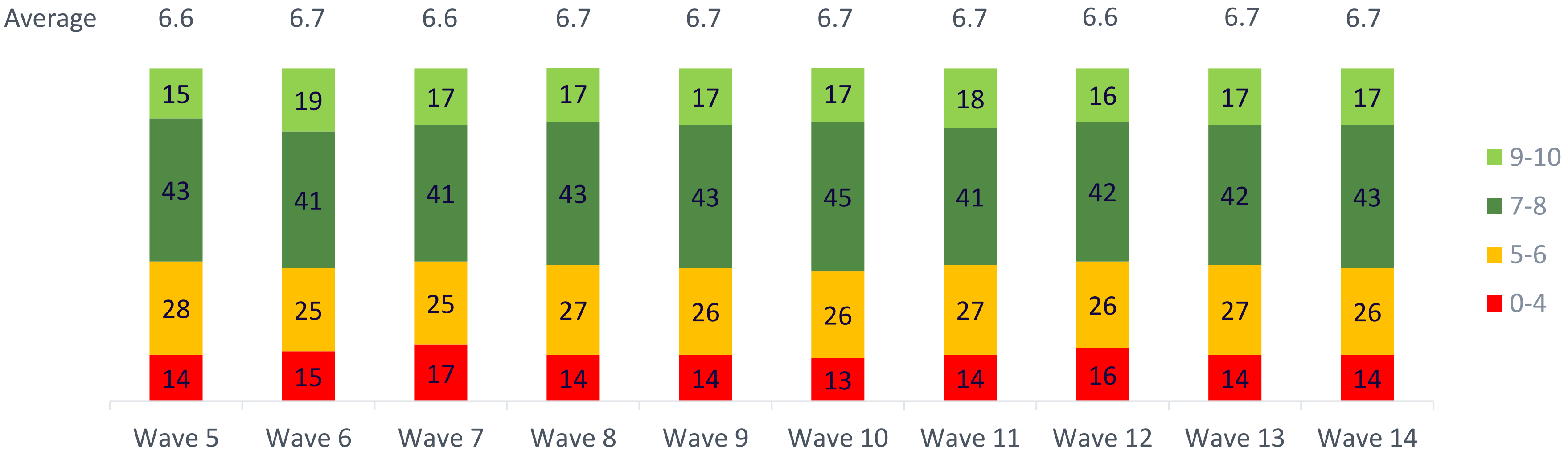
*Please note 3 week gap between Wave 13 and Wave 14.

1. The National Mood

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

- The average mood of UK residents remains consistent at 6.7 out of 10.

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

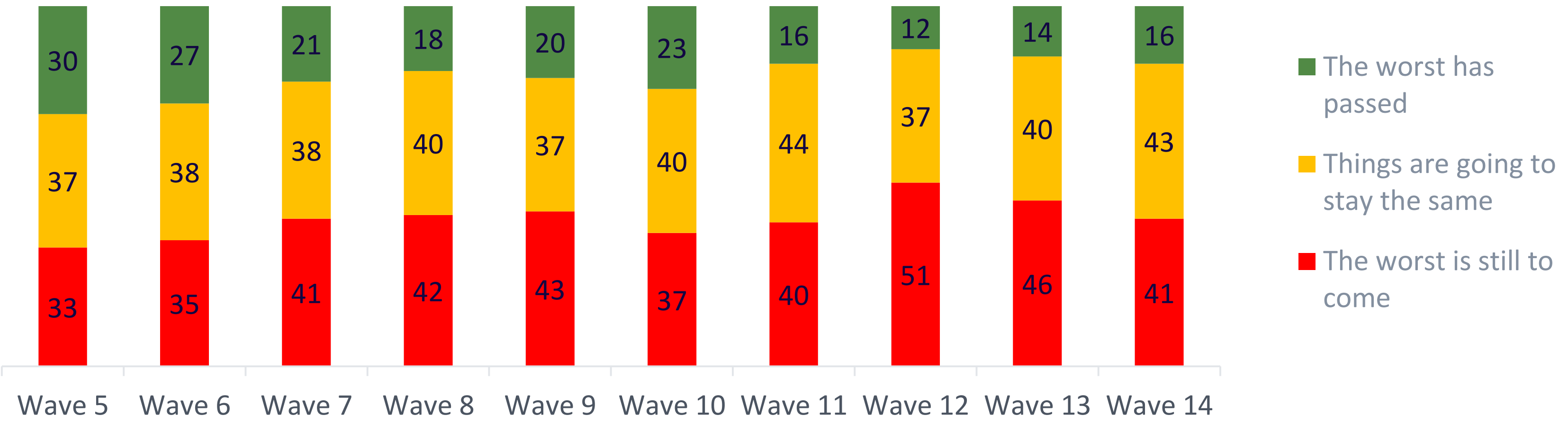


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 14 n=1,762
*Please note, there was 3 week gap between Wave 13 and Wave 14.

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

- 41% of the adult population feel the worst is still to come in relation to COVID-19
- This represents a significant drop on the 46% that stated this last wave, and the second consecutive significant drop in a row.

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, 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. Wave 14 n=1,762
*Please note, there was 3 week gap between Wave 13 and Wave 14.

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

- 67% don't believe life will return to normal before April next year.
- 11% of Wave 14 respondents expect some sort of 'normality' by December this year, significantly lower than the 18% stating this in Wave 13

Figure 3. Perceptions of when things will return 'close to normal'
Percentage Wave 14, UK

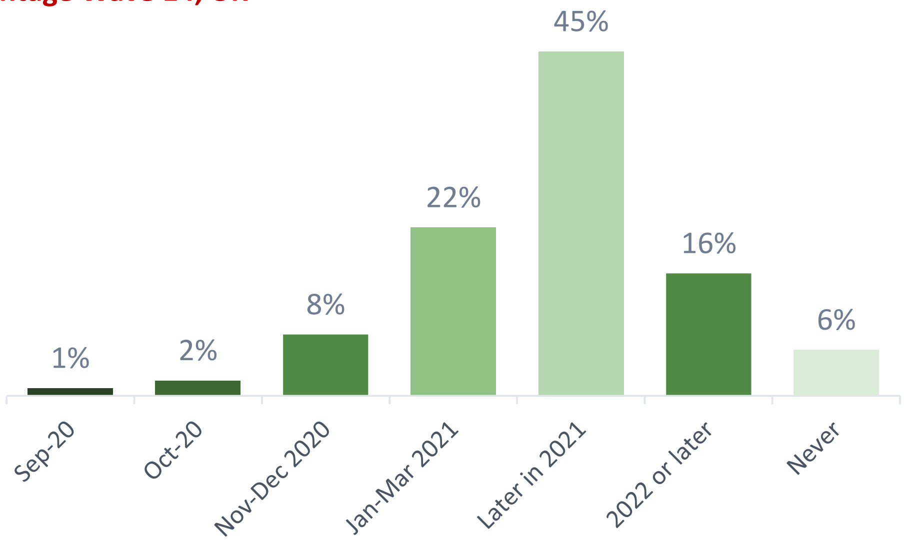
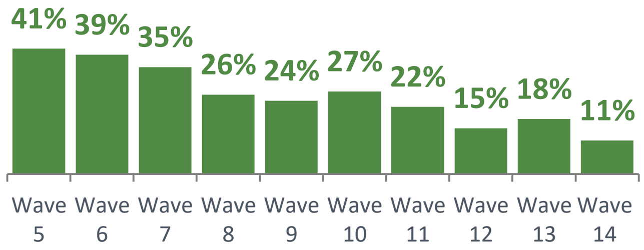


Figure 4. Proportion expecting normality by December, Percentage wave-on-wave, UK

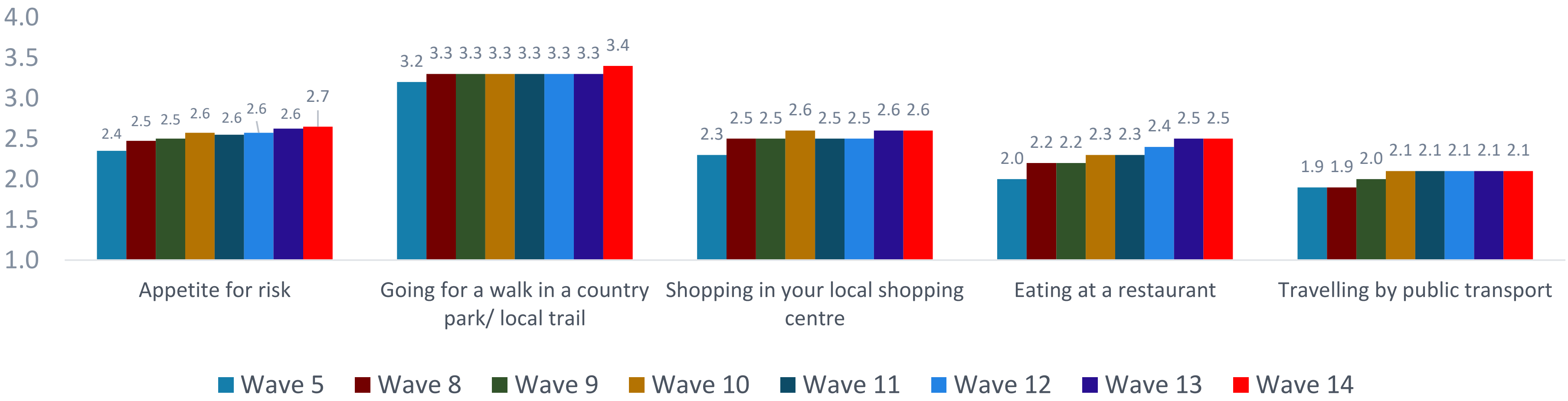


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Wave 14 n=1,762
*Please note, there was 3 week gap between Wave 13 and Wave 14.

Appetite for Risk

- Comfort undertaking most everyday activities remains consistent in Wave 14 except for ‘going to a country park’ receiving its highest score at 3.4
- This slight increase has maintained the rising trend of the ‘appetite for risk’ score throughout the study

Figure 5. Level of comfort conducting a range of activities separately and combined, Average Score wave-on-wave 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: appetite for risk’ is calculated as a straight average of the four scores. Wave 14 n=1,762 . *Please note, there was 3 week gap between Wave 13 and Wave 14.

2. Trips *taken* during July and August

Proportion of trips taken and intended in July/August and trip purpose

- Just over 1 in 4 U.K. adults say they *have been* on a U.K. overnight trip since the start of July. This is significantly higher than the proportion who intended to take a trip during this period (when asked just prior to the easing of lockdown).
- Trip purpose for both intenders and takers was most likely to be 'holiday', although visiting friends or relatives (VFR) has higher representation for the latter, possibly suggesting these more spontaneous trips may be partly responsible for the uplift.

Figure 6. Proportion taken an overnight holiday or short break in the U.K. in July/August compared to intentions, Percentage Wave 14 and Waves 5-8, U.K.

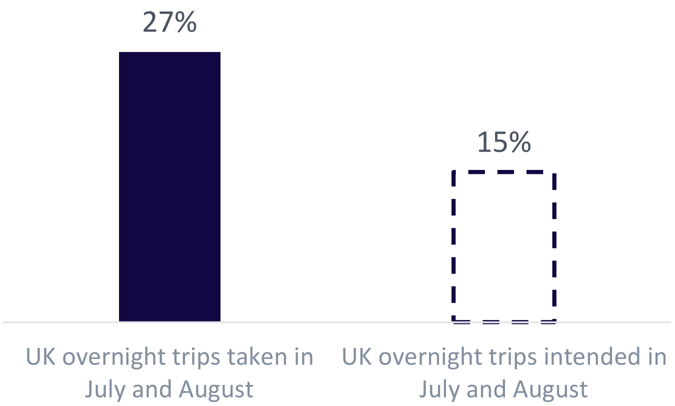
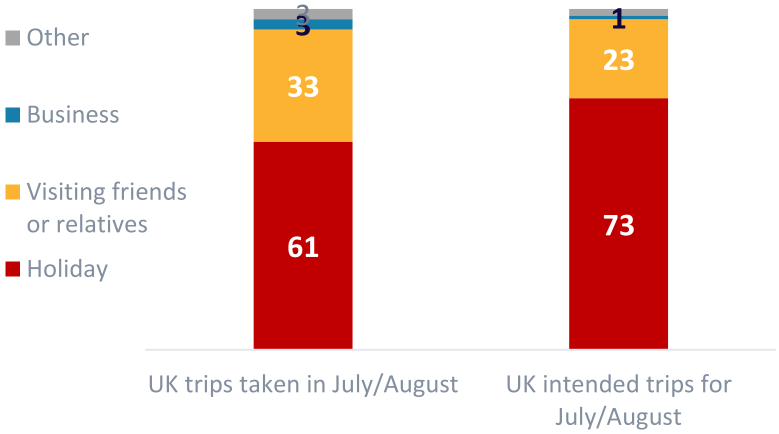


Figure 7. Purpose of intended and taken holiday or short break in UK, Percentage Wave 14 and Waves 5-8, U.K.

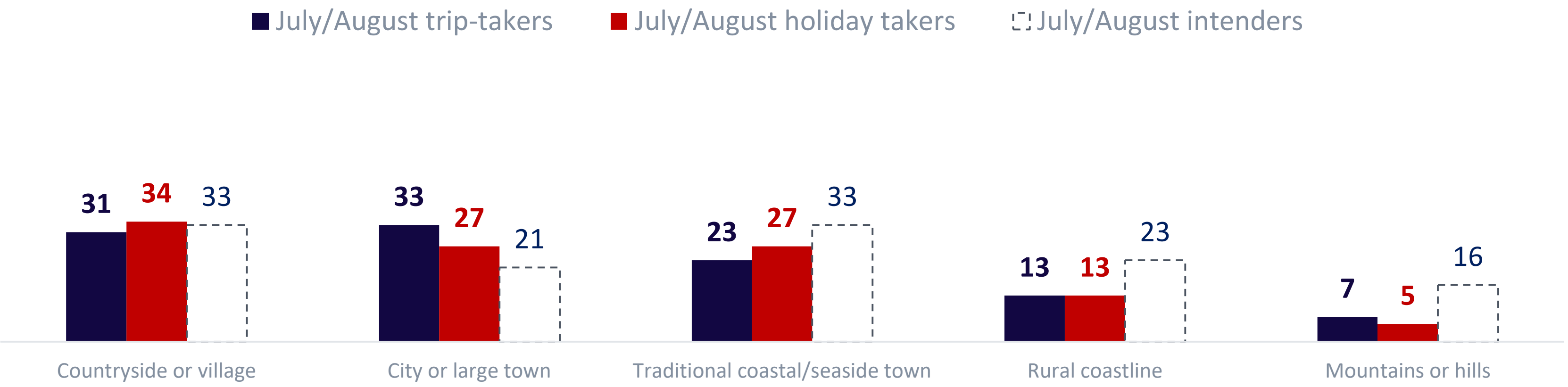


QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the trip you took in summer? Base: All respondents. Wave 14 n=1,762, Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted .

Destination type of trips taken and intended in July/August

- Countryside or village was the main destination type for a ‘holiday’ taken in July/August; aligned with intentions.
- For ‘all trips’ (which could be for any purpose including VFR or business) then ‘city or large town’ emerges as the leading destination type for overnight trips.
- Actual trips to ‘traditional coastal/seaside’ towns indexed lower than intentions, as did rural coastline and mountains or hills.

Figure 8. Main type of destination for summer overnight trip, Percentage Wave 14 and Waves 5-8, U.K.

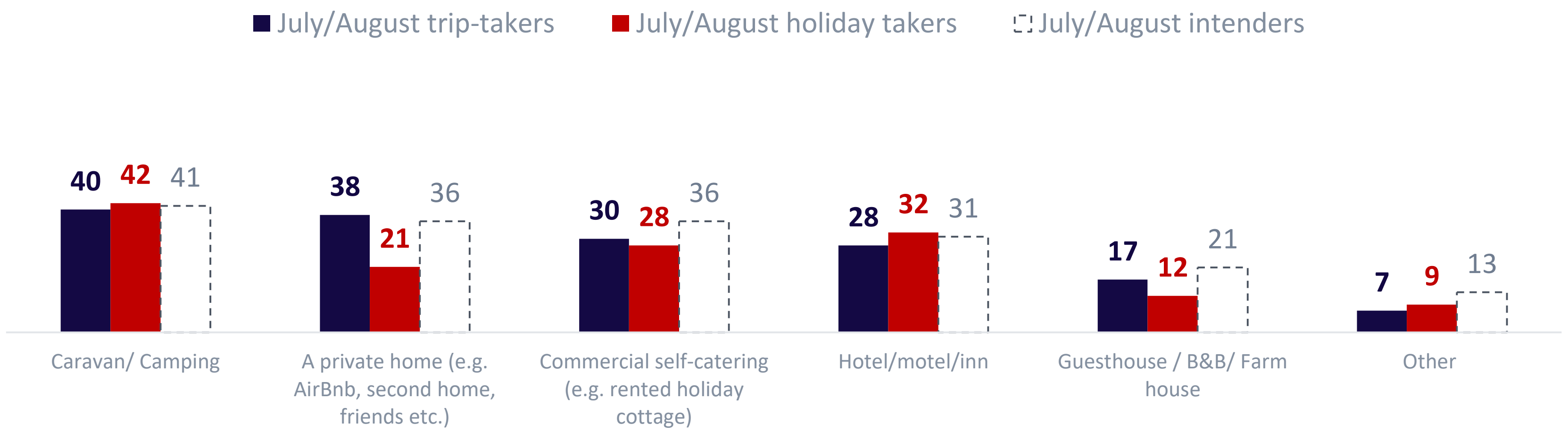


VB13d. Which of the following best describes the main type of destination you stayed in during your trip in summer?
Base: All respondents. Wave 14 n=1,762. Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted .

Accommodation type of trips taken and intended in July/August

- Consistent with intent, ‘caravan/camping’ was the leading accommodation type used for both holidays and trips for any purpose this summer, with a 42% and 40% share respectively.

Figure 9. Accommodation stayed in this summer, Net Percentage Wave 14 and Waves 5-8, U.K.

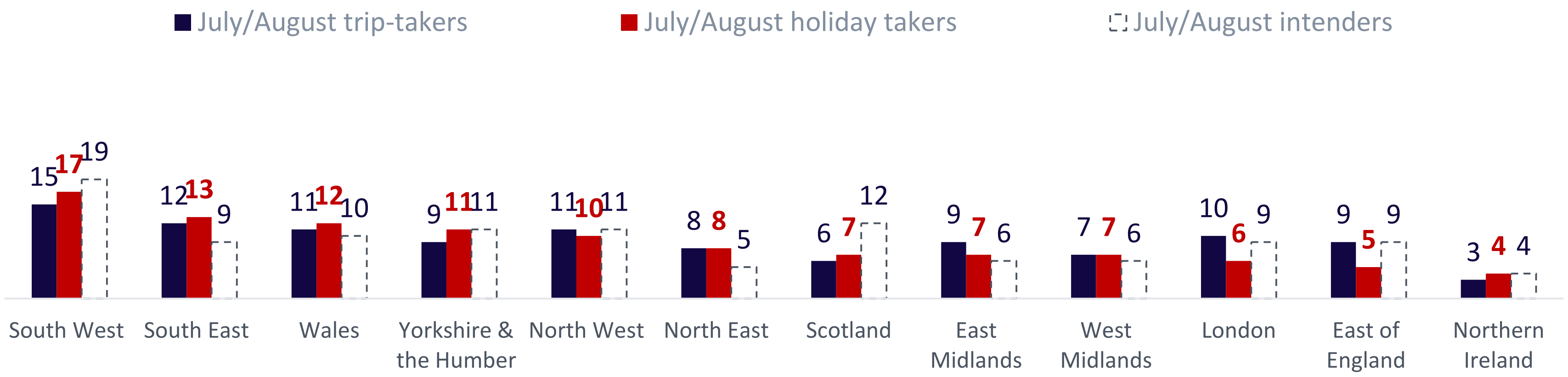


VB13f. In what type/s of accommodation did you stay in during your U.K. trip in summer?
Base: All respondents. Wave 14 n=1,762. Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted .

Destination for trips taken and intended in July/August

- Aligned with intentions, the South West of England attracted the highest share of *holiday* trips, at 17%.
- Scotland, by contrast, received a lower share of actual visits compared to the level of intent during the July and August period.

Figure 10. Where trips takers in summer stayed compared to their intentions, Percentage Wave 14 and Waves 5-8, U.K., Ranked on holidays



VB13c. Where in the U.K. did you stay on this trip in July/August?
Base: All respondents. Wave 14 n=1,762. Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted.

3. Trip Intentions

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

- 43% intend to take the same or more U.K. short breaks compared to normal, consistent with Wave 13. 42% express this for longer breaks of 4+ nights.
- 39% feel they are likely to take fewer of both types of trip, and around 1 in 5 remain unsure.

Figure 11. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Wave 14, UK

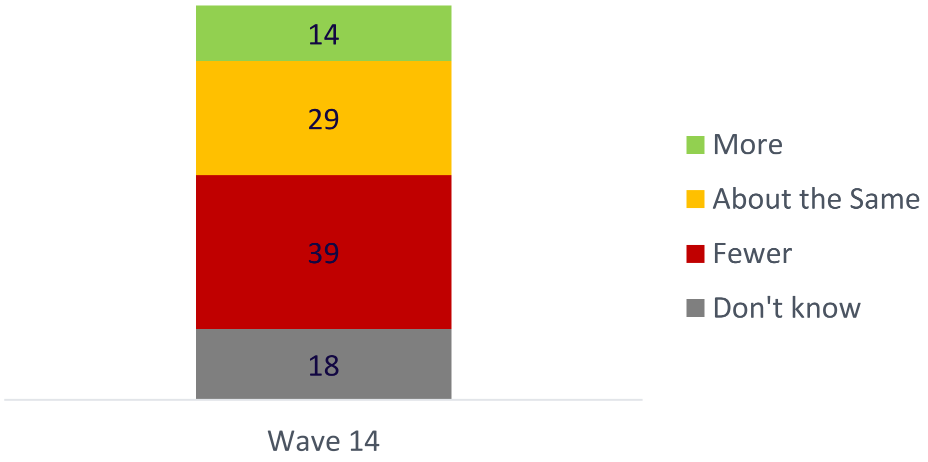
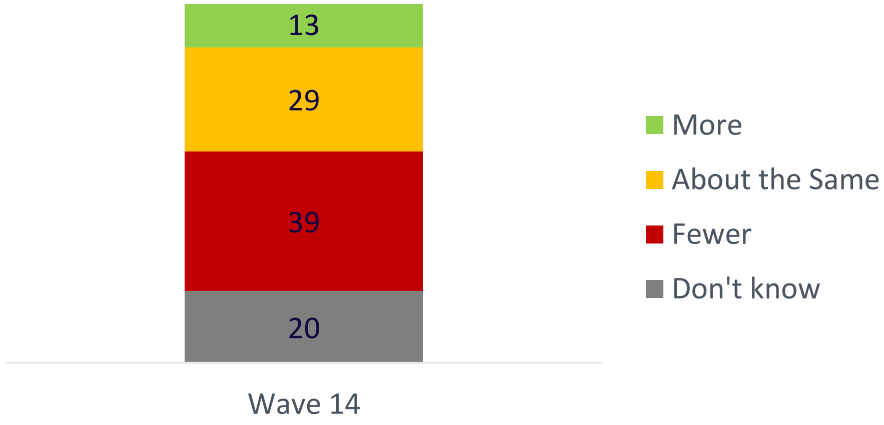


Figure 12. Number of UK longer breaks (4+ nights) over the rest of this year compared to normal, Percentage Wave 14, UK



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. Wave 14 n=1,762

Anticipated number of OVERSEAS trips this year compared to normal

- 28% of U.K. adults intend to take more or about the same number of both overseas short (1-3 nights) and longer breaks (4+ nights) by the end of the year compared to normal. Note, however, that both figures are dominated by those taking about the same amount of trips – very few expect to take more.
- Around half the UK adult population anticipate taking fewer overseas trips between now and the end of the year compared to normal.

Figure 13. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Wave 14, UK

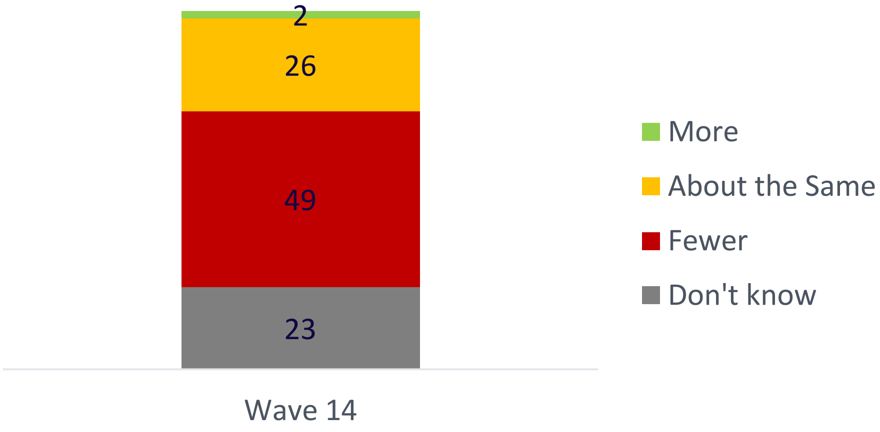
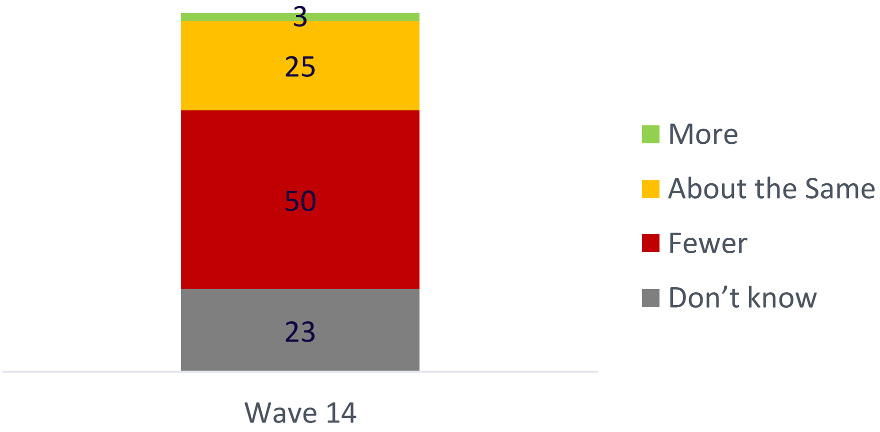


Figure 14. Number of OVERSEAS longer breaks (4+ nights) over rest of this year compared to normal, Percentage Wave 14, UK



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. Wave 14 n=1,762

Confidence in the ability to take a U.K. overnight trip

- Confidence in the ability to take an overnight trip in the UK stands at 38% in September; slightly higher than in the previous two waves.
- Confidence is relatively flat from September through to December, not exceeding 40% at any point.
- From January onwards sentiment increases, with the majority (55%) being confident in taking a UK overnight trip by March 2021.

Figure 15. Confidence in taking a UK overnight trip across a range of different months, Percentage Wave 14, UK

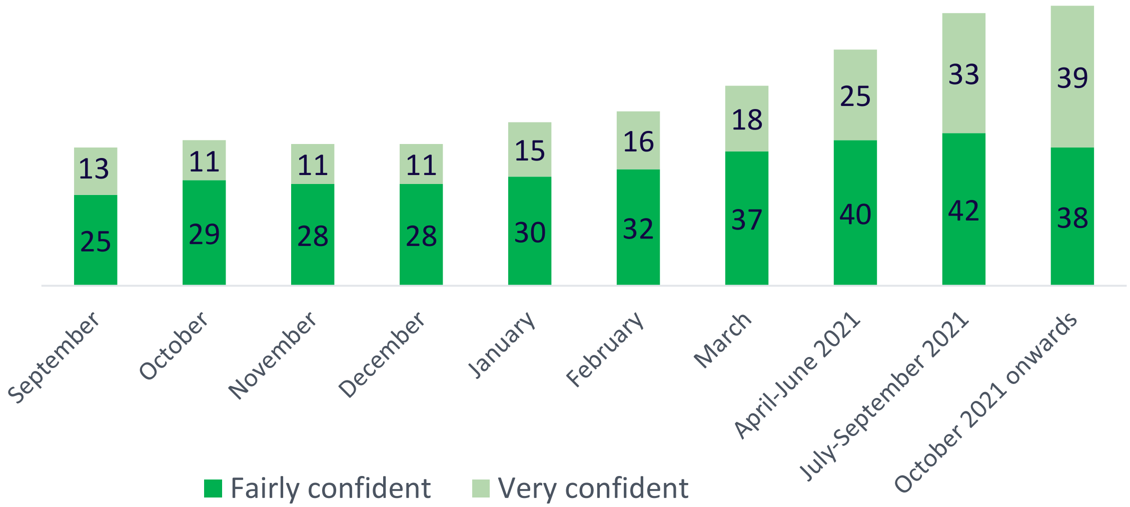
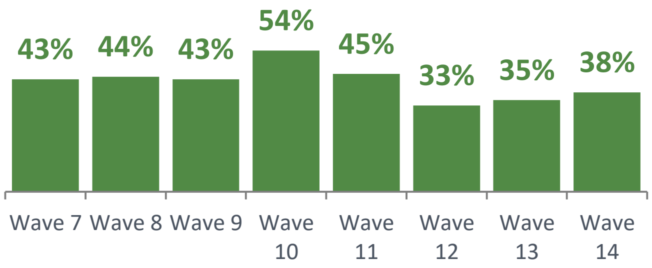


Figure 16. Confidence in taking a UK overnight trip in September, Percentage wave-on-wave, UK



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. Wave 14 n=1,762

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

- ‘Concerns about catching COVID-19’ is the leading reason people cite for not feeling confident about taking a U.K. overnight trip this autumn and winter.
- ‘Restrictions on travel from government’ and ‘personal finances’ make up the remainder of the top three across both time periods.

Figure 17. Top 5 reasons for not being confident about travelling in autumn*, Percentage Wave 14, UK

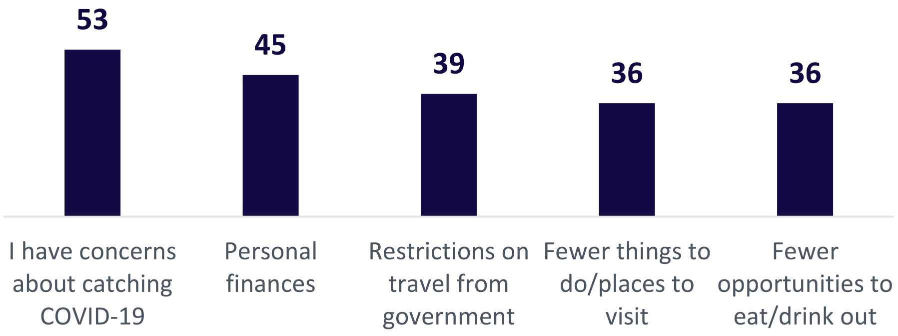
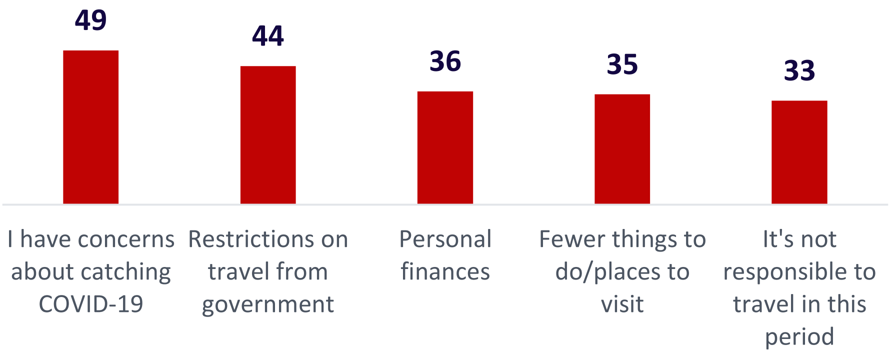


Figure 18. Top 5 reasons for not being confident about travelling in winter*, Percentage Wave 14, UK



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: Wave 14 respondents not confident about taking a break in Autumn n=272 and in Winter n=673. *Autumn is defined as September and October. Winter is defined as November to March 2021.

When anticipating to plan and book next U.K. overnight trip

- 19% have already planned and 15% have already booked their next domestic overnight trip.
- A further 16% intend to plan, and 15% intend to book, their next trip during either September or October.

Figure 19. When anticipate PLANNING next UK overnight trip, Percentage Wave 14, UK

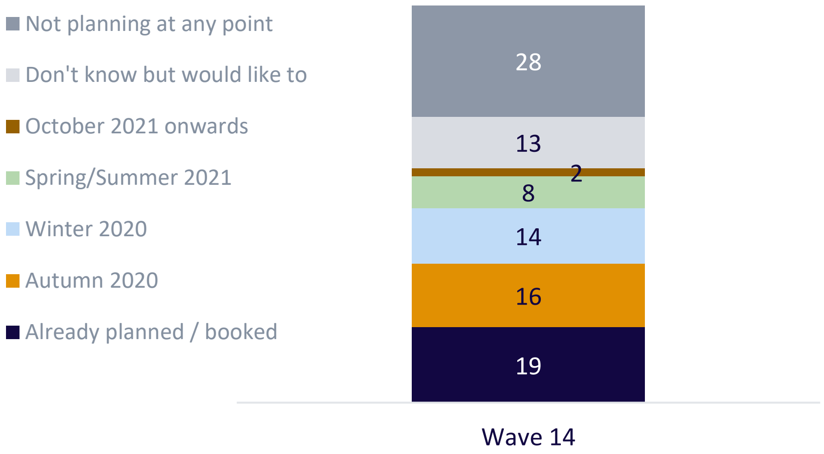
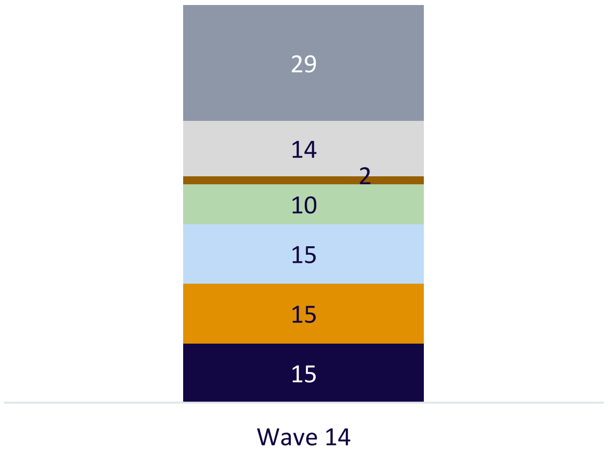


Figure 20. When anticipate BOOKING next UK overnight trip, Percentage Wave 14, UK



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. Wave 14 n=1,762

When anticipating going on next U.K. overnight trip

- 19% of U.K. adults plan on going on their next U.K. overnight trip by the end of October, with a further 14% doing so between November 2020 and March 2021
- When looking at all trips U.K. adults intend to take (including those planning multiple trips) a relatively equal proportion intend to take an Autumn and Winter trip (19% and 21% respectively).

Figure 21. When anticipate GOING on next UK overnight trip, Percentage Wave 14, UK

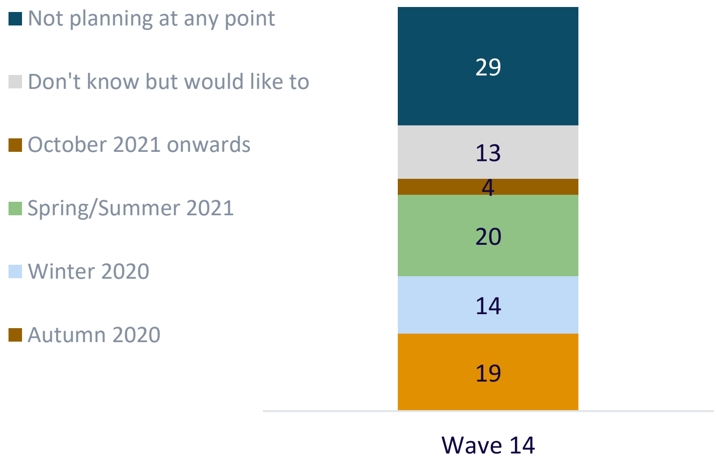
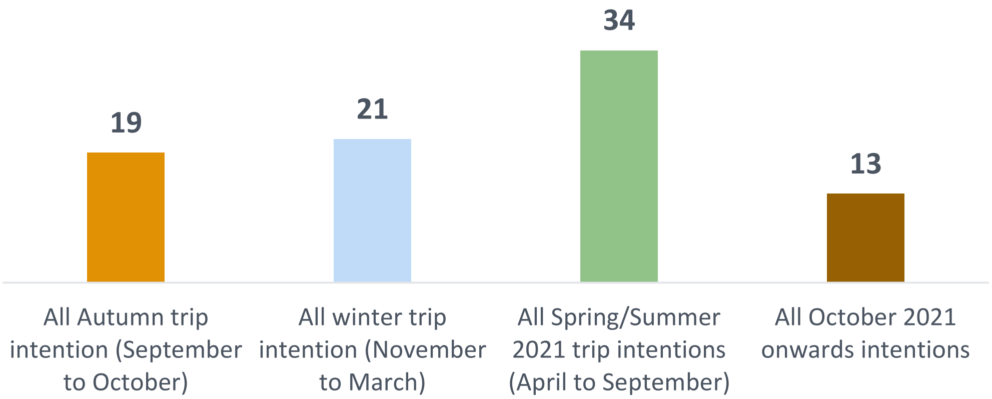


Figure 22. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 14, UK



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. Wave 14 n=1,762

Proportion already planned or booked their next U.K. overnight trip

- 47% of U.K. autumn intenders have **not yet** planned their next U.K. overnight trip, with 52% still yet to book. A minority of winter intenders have planned or booked their trips (29% and 19% respectively)

Figure 23. Proportion of Intenders that have already *planned* their trip, Percentage Wave 14, UK

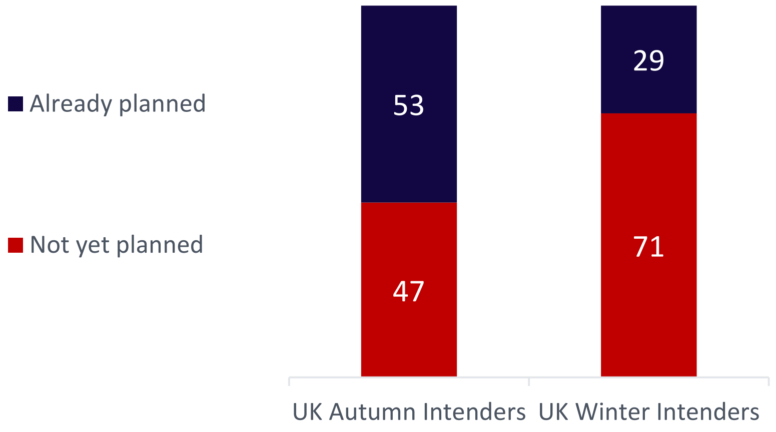
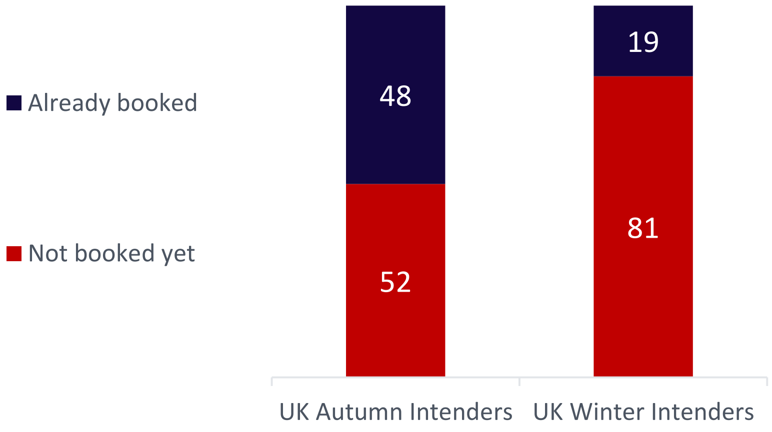


Figure 24. Proportion of Intenders that have already *booked* their trip, Percentage Wave 14, UK

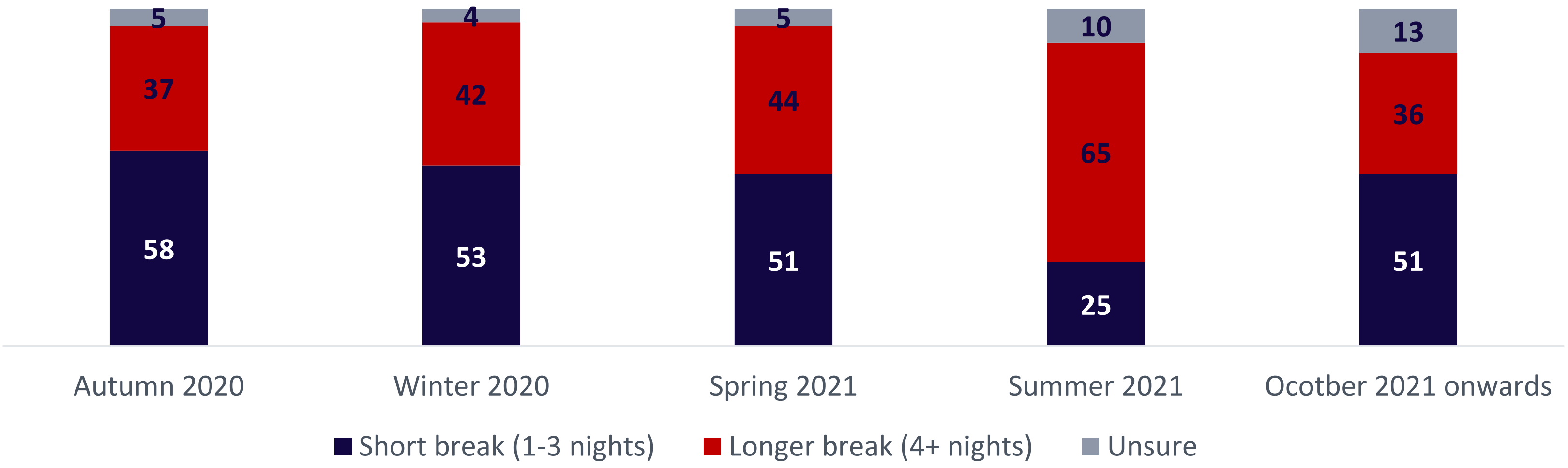


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK; Autumn n=272 and in Winter n=673

When planning on taking next UK overnight trip, by trip length

- Shorter breaks of 1-3 nights look set to account for a higher volume of trips than those of 4+ nights until next summer.
- Longer trips of 4+ nights are more likely for summer 2021 (July – Sept) but then short breaks regain the leading share from October 2021 onwards.

Figure 25. Length of next UK holiday or short break by time period, Percentage Wave 14, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 14 respondents intending to take next holiday in each time period Autumn 2020 n=325, Winter 2020 n=255; Spring 2021 n=141; Summer 2021 n=199; October 2021 onwards n= 70

Where planning on staying on next U.K. overnight trip

- The South West remains significantly more likely than any other U.K. region to receive visitors in Autumn this year (19% intending to visit). This is followed by Scotland and Yorkshire & the Humber (both 12%).
- The South West, North West and Scotland lead Winter trip intent.

Figure 26. Where planning on staying on next UK overnight trip in Autumn, Percentage Wave 14, UK

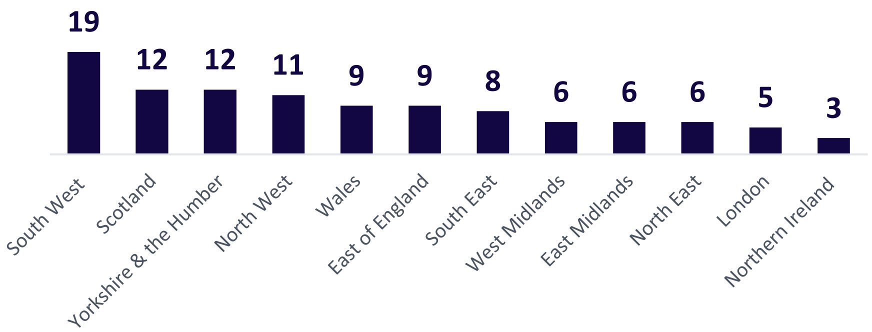
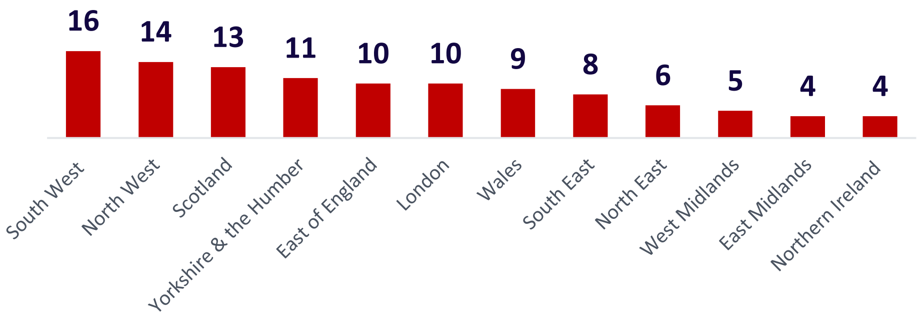


Figure 27. Where planning on staying on next UK overnight trip in Winter, Percentage Wave 14, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=325 and for Winter (November-March) n=255.

Main mode of transport for next U.K. overnight trip

- Across both time periods, 'own car' is the leading mode of transport although significantly more so for Autumn trips. Train is the second most preferred mode, with plane becoming a more significant means of travelling to the intended destination during the winter period.

Figure 28. Top 5 main modes of travel to destination for trip in Autumn, Percentage Wave 14 UK

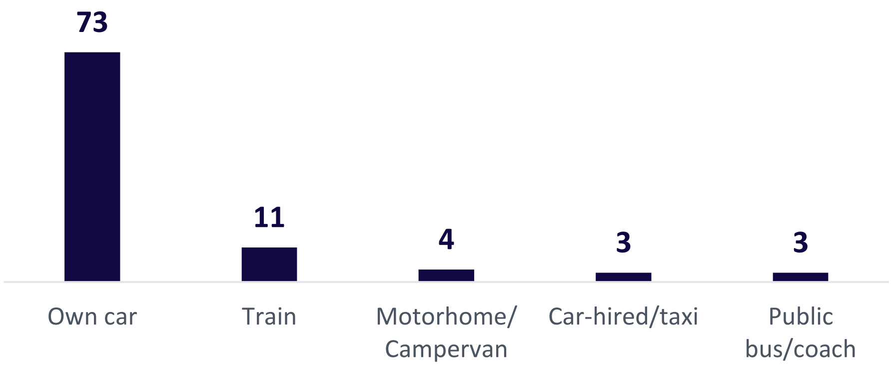
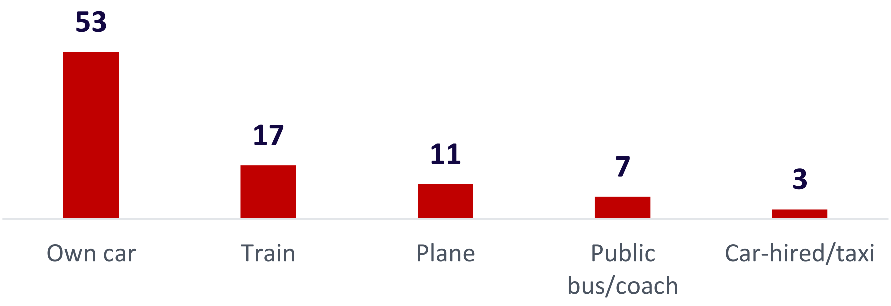


Figure 29. Top 5 main modes of travel to destination for trip in Winter Percentage Wave 14, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=325 and from Winter (November-March) n=255

Type of destination for next U.K. overnight trip

- ‘Countryside or village’ (38%) is significantly ahead of ‘traditional coastal/seaside town’ (29%) as the main destination type for a trip in autumn. ‘City or large town’ (21%) and ‘rural coastline’ (20%) are the next most preferred destination types although significantly less so again
- In winter, ‘countryside or village’ (36%) is still the most preferred destination type although it’s only marginally ahead of ‘city or large town’ (34%).

Figure 30. Main type of destination for trip in Autumn, Percentage Wave 14, UK

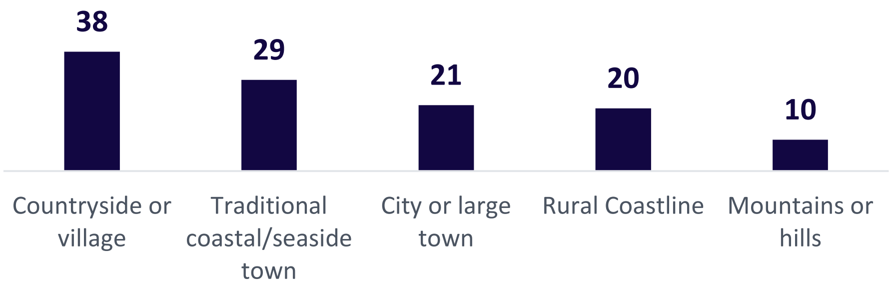


Figure 31. Main type of destination for trip in Winter, Percentage Wave 14, UK

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=325 and for Winter (November-March) n=255.

Type of accommodation for next U.K. overnight trip

- ‘Hotel/motel/inn’ is the preferred type of accommodation for trips in autumn, ahead of ‘caravan/camping’.
- Staying at ‘a private home’ leads during winter, partly due to the higher incidence of intended trips to towns and cities.

Figure 32. Accommodation planning on staying in on next UK overnight trip in Autumn, Net percentage Wave 14

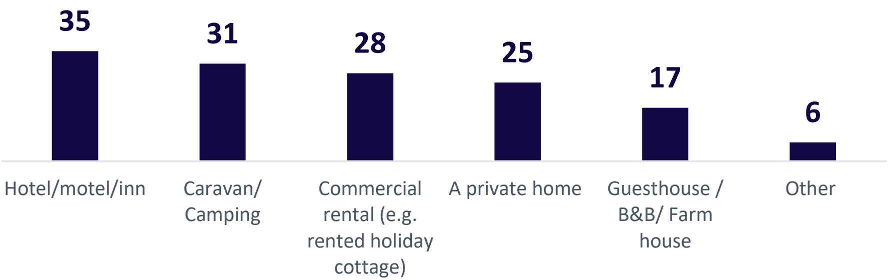
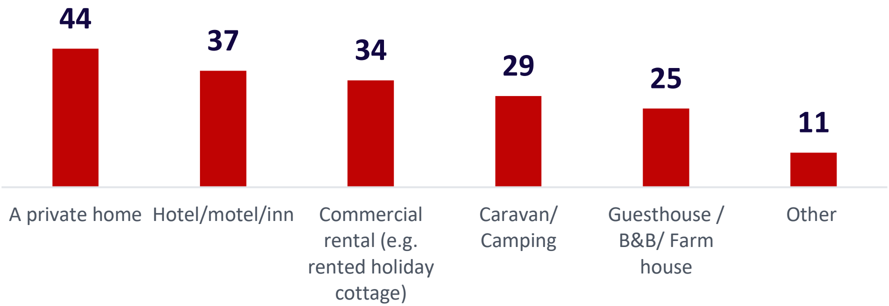


Figure 33. Accommodation planning on staying in on next UK overnight trip in Winter, Net percentage Wave 14

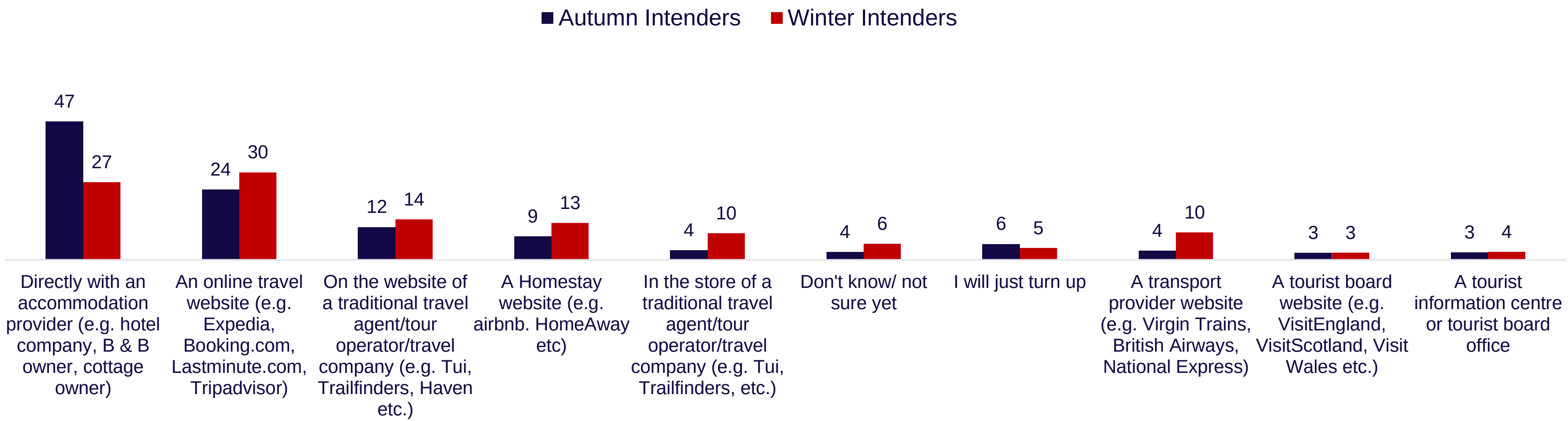


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=325 and for Winter (November-March) n=255.

Method of booking accommodation for next U.K. overnight trip

- ‘Autumn intenders’ are most likely to book their accommodation directly with an accommodation provider, winter intenders through an online travel website.
- These differences are partly driven by age profile, with autumn intenders more likely to belong to the ‘older independent’ and ‘retiree’ life stages which tend to favour direct booking.

Figure 34. Accommodation booking channel for next trip in autumn and winter, Percentage Wave 14, U.K.

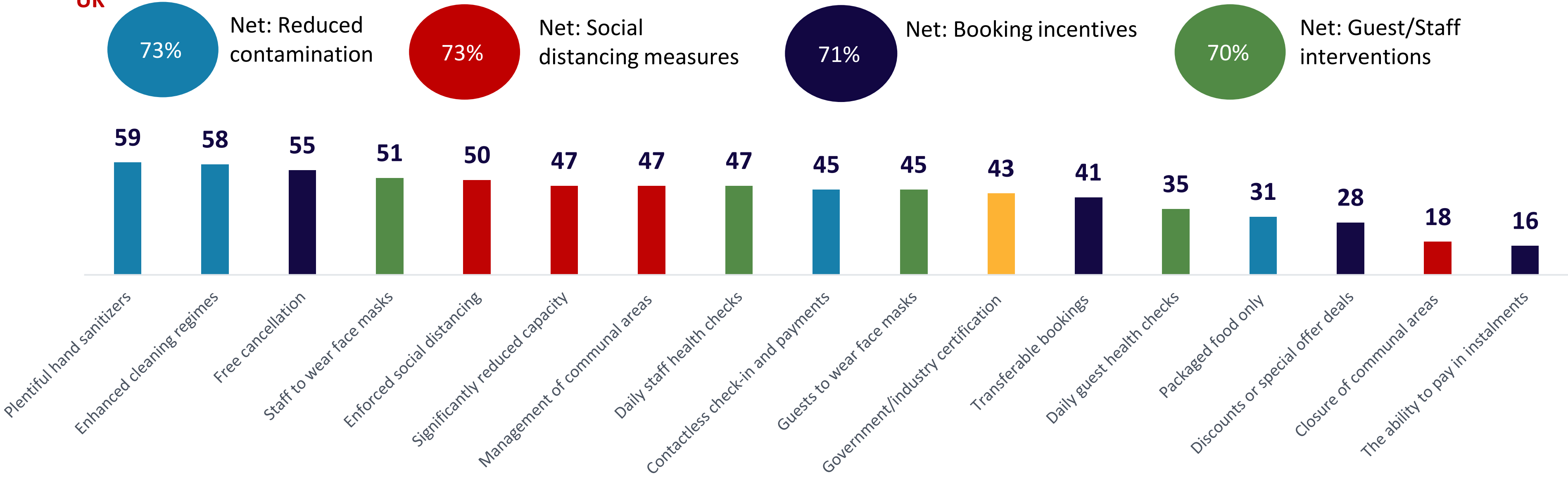


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 14 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=325 and for Winter (November-March) n=255.

Conditions essential for people to stay in accommodation this summer

- Steps to reduce cross-contamination and ensure social distancing (both 73%) are the top two broad assurances the public need when planning a stay in accommodation in the coming months.
- ‘Plentiful hand sanitisers’ (59%), ‘enhanced cleaning regimes’ (58%) and ‘free cancellation’ (55%) are the top three individual reasons.

Figure 35. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Wave 14, UK

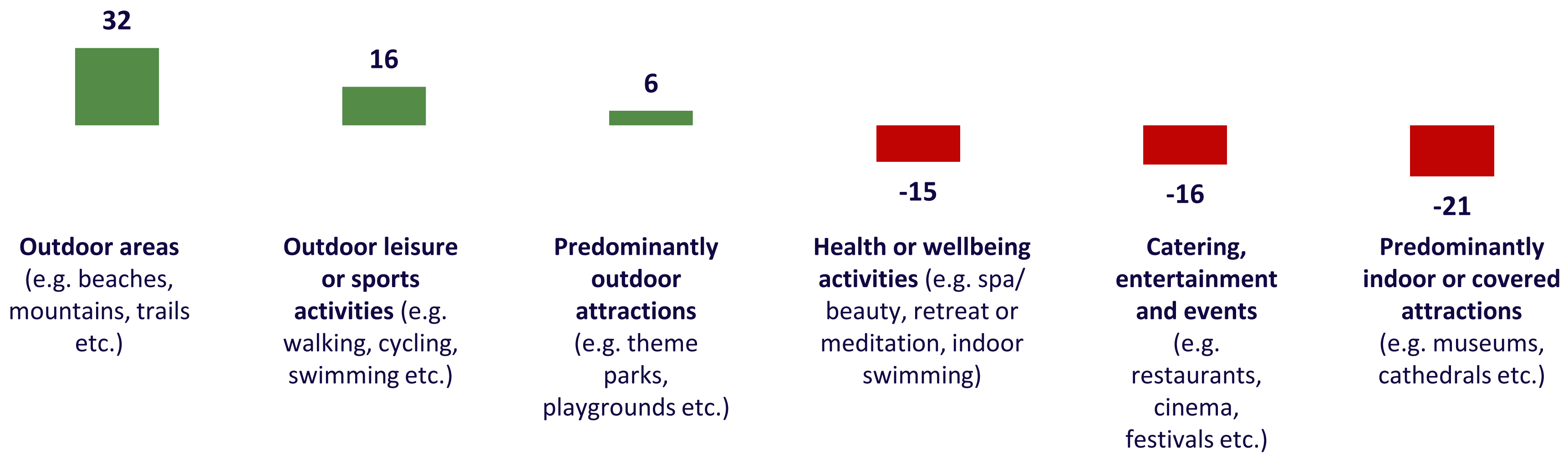


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 14 respondents n=1,762.

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 +16) and outdoor visitor attractions (+6). Health or wellbeing activities (net -15), catering, entertainment and events (net -16), and indoor attractions (net -21) remain most likely to attract fewer visitors/engagement than normal.

Figure 36. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Wave 14, UK



QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All Wave 14 respondents n=1,762.

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the U.K. adult population.
- 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 Wave 14 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-13 where appropriate. Wave 14 fieldwork was conducted between 1st to 4th September 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.