COVID-19 Consumer Tracker

Wave 15

Fieldwork Period: 14 September to 18 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	14 September – 18 September
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 15: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	**Wave 14**	**Wave 15**	**Wave Shift**
National mood (average score out of 10)	6.7	6.5	-0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	16%	10%	-6*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.65	2.55	-0.1
Normality score (proportion expecting normality by December)	11%	6%	-5*
The main reasons for not feeling confident about taking a trip in Sept-Oct (Top 2)	1. Concerns about catching COVID-19 2. Personal finances	1. Restrictions on travel from government 2. Concerns about catching COVID-19	New no. 1

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	**Wave 14**	**Wave 15**	**Wave Shift**
Anticipated number of UK short breaks compared to normal (% more/the same)	43%	39%	-4
Anticipated number of UK longer breaks compared to normal (% more/the same)	42%	37%	-5
Near-term confidence in taking UK overnight trip (September/October confident)	38%/40%	30%/29%	-8*/-11*
Medium-term confidence in taking UK overnight trip (Nov/Dec confident)	39%/39%	28%/30%	-11*/-9*
Proportion going on a UK overnight trip this Autumn (September/October)	19%	15%	-4*
Split between longer break / short break / don't know for Autumn trip	37%/58%/5%	37%/59%/4%	0/+1/-1

Wave 15: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	Wave 14	Wave 15	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	Countryside or village	Countryside or village	No change
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

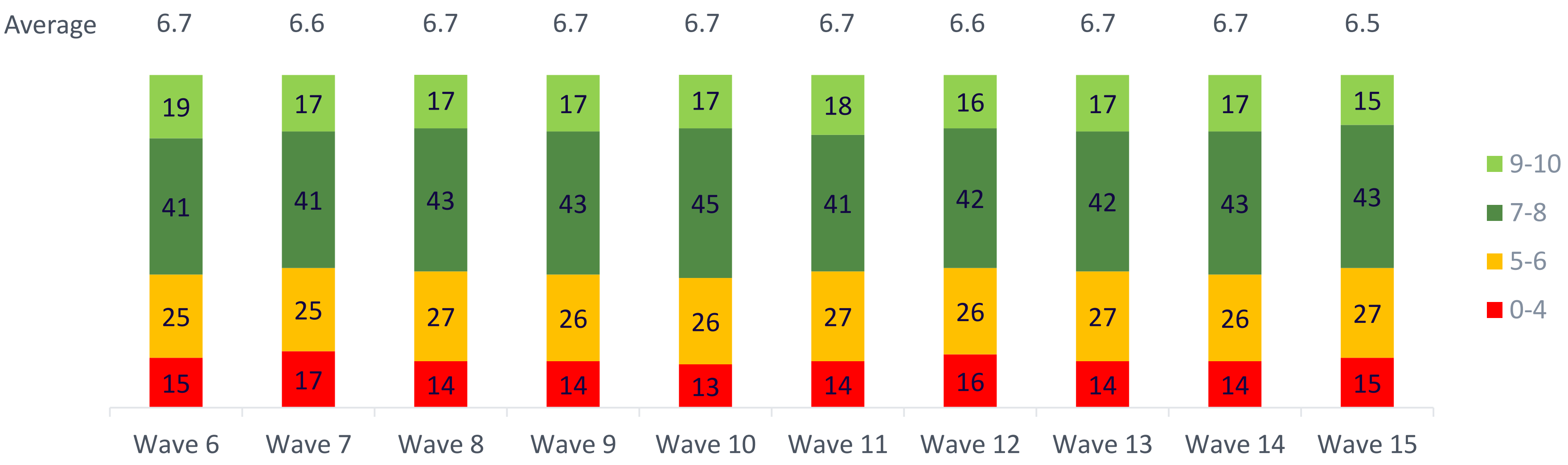
Key Metrics	Wave 14	Wave 15	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

1. The National Mood

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

- The average mood of U.K. residents has dropped to 6.5, the lowest mood rating across all 15 waves of this research.

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

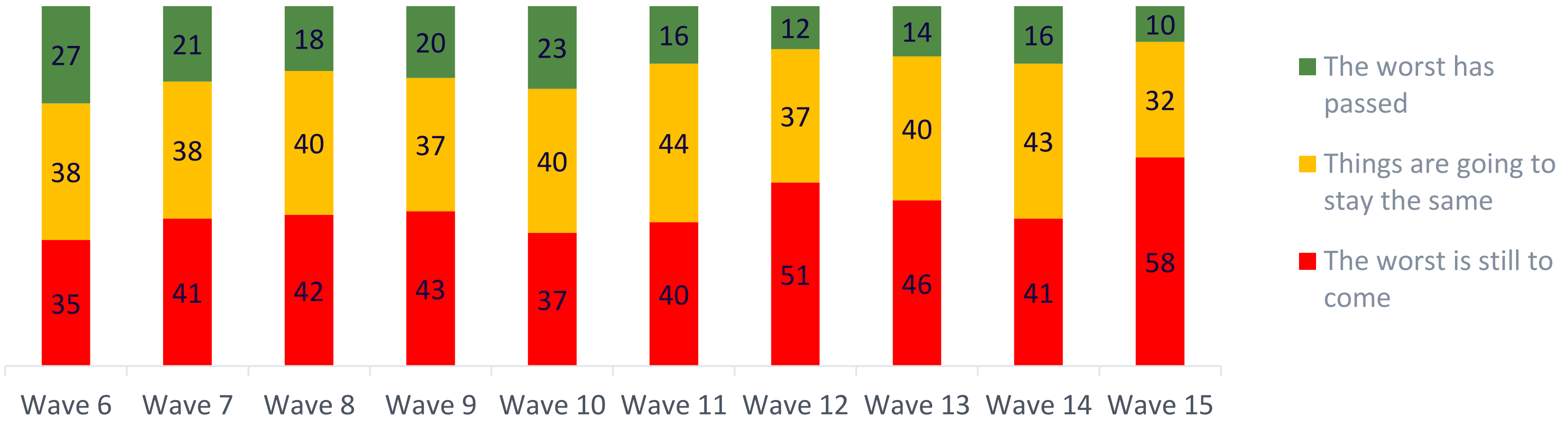


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 15 n=1,760

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

- 58% of the UK adult population now feel ‘the worst is still to come’ in relation to COVID-19, the highest proportion recorded thus far and significantly higher than the 41% stated in wave 14.
- In a similar vein, only 10% think ‘the worst has passed’.

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 15 n=1,760

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

- The majority of the U.K. adult population (55%) don't believe life will 'return close to normal' before June next year.
- Only 6% of Wave 15 respondents expect some sort of 'normality' by December this year, significantly lower than the 11% stating this in Wave 14.
- 20% don't expect lives to return to something close to normal until at least 2022.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Wave 15, UK

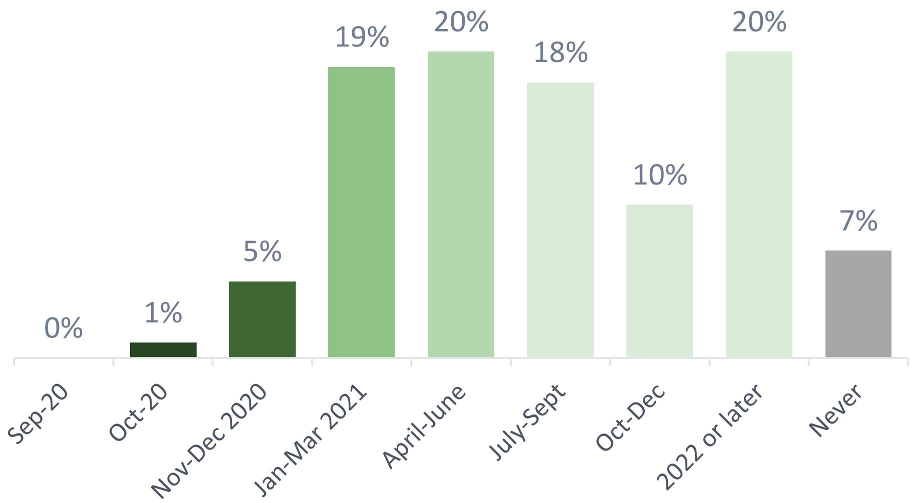
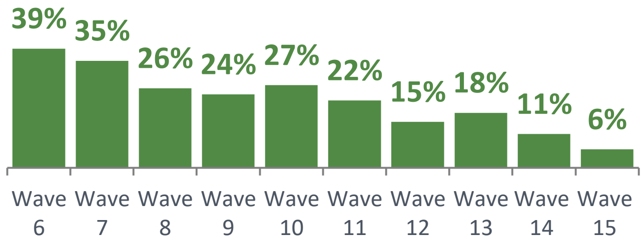


Figure 4. Proportion expecting normality by December, Percentage wave-on-wave, UK

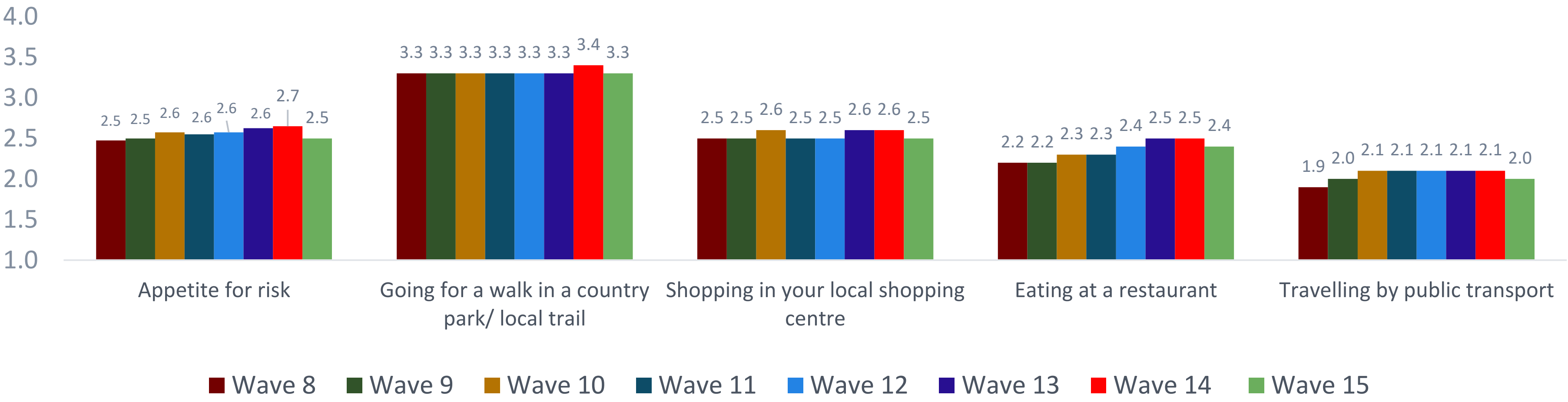


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Wave 15 n=1,760

Appetite for Risk

- Comfort undertaking each of the prompted activities has dipped since wave 14, with the overall ‘appetite for risk’ average the lowest it has been since wave 9 at 2.5.

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 15 n=1,760.

2. Trips *taken* during July and August

Proportion of trips taken and intended: July to Sept and trip purpose

- 29% of U.K. adults say they *have taken* a domestic overnight trip since the start of July. This is slightly higher than the 24% who *intended* to take a trip over the same period (when asked just prior to the easing of lockdown).
- Trip purpose for both ‘intenders’ and ‘takers’ was most likely to be a 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. from July to September compared to intentions, Percentage Wave 15 and Waves 5-8, U.K.

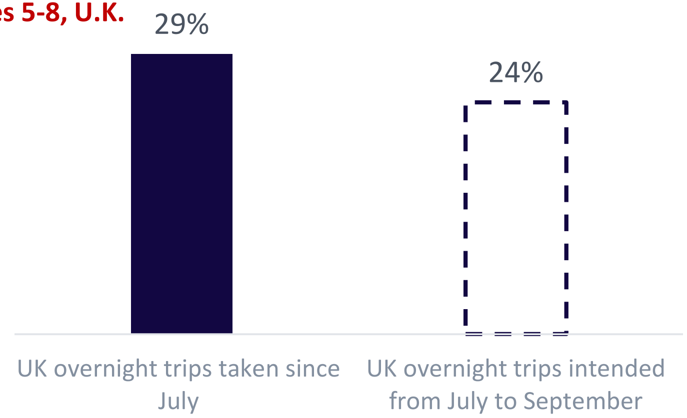
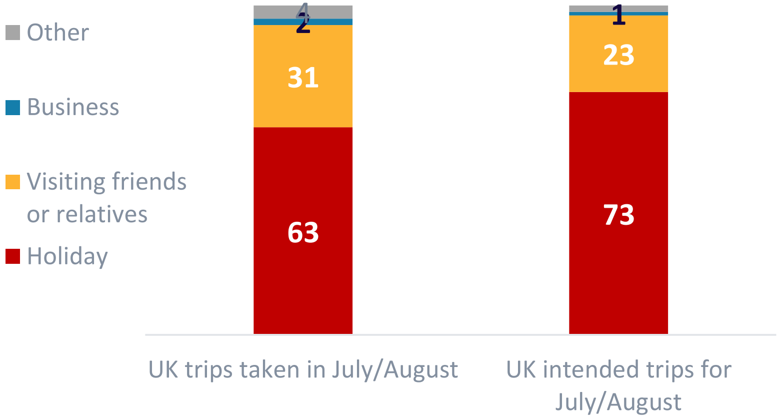


Figure 7. Purpose of intended and taken holiday or short break in UK, Percentage Waves 15 and 16 and Waves 5-8, U.K.

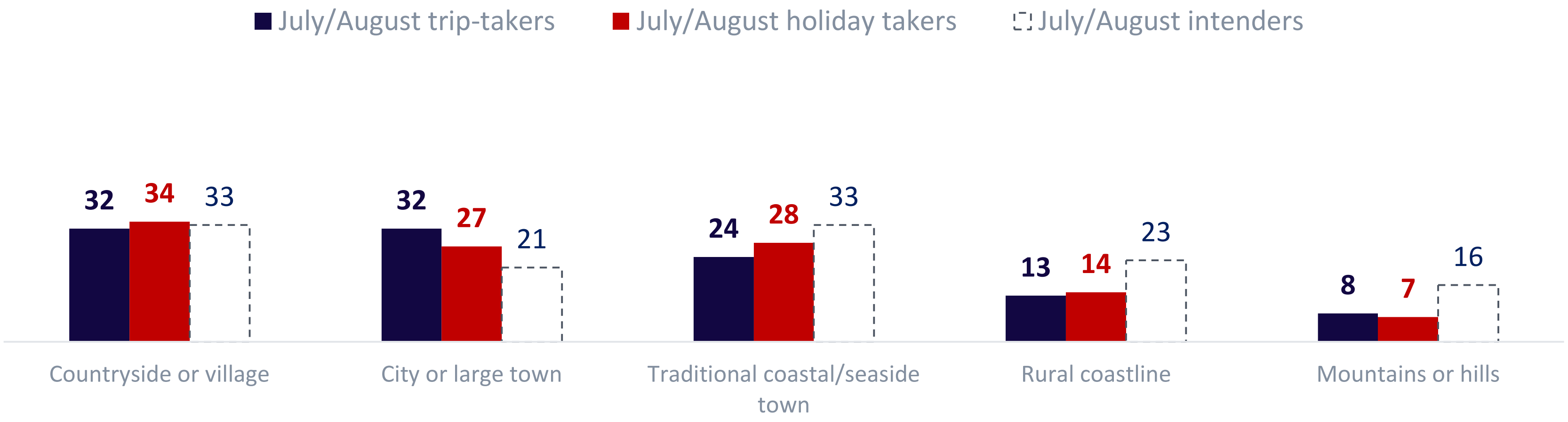


QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the most recent trip you took in summer? Base: All respondents. Wave 15 n=1,760, Base trip-takers Wave 14 and 15 n=972 Trip intentions 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 with 34% share; aligned with intentions.
- For ‘all trips’ (which could be for any purpose including VFR or business) ‘city or large town’ is the joint leading destination type with 32% share.
- 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 Waves 14 -15 and Waves 5-8, U.K.

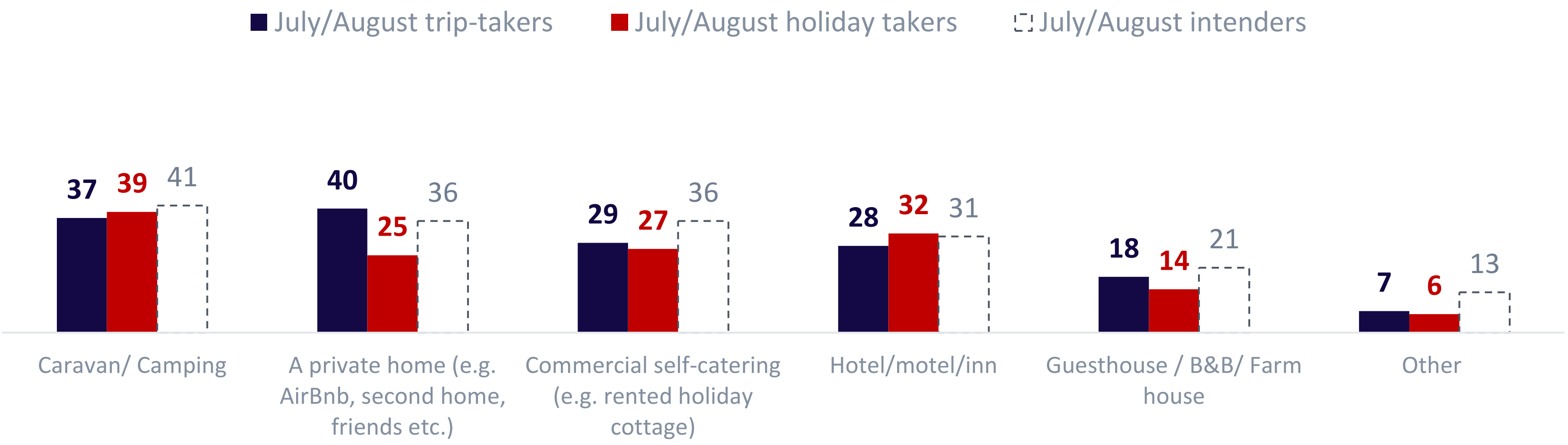


VB13d. Which of the following best describes the main type of destination you stayed in during your trip in summer?
Base: All trip-takers. Wave 14 and 15 All trip takers n=972; Holiday takers n=597. Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted .

Accommodation type of trips taken and intended in July/August

- Consistent with intent, 'caravan/camping' was the leading accommodation type used for holidays (39% share) followed by 'hotel/motel/inn' (32%).
- 'Private home' was the leading choice for 'all trips' with 40% share, driven by stays with friends or relatives

Figure 9. Accommodation stayed in this summer, Net Percentage Waves 14-15 and Waves 5-8, U.K.

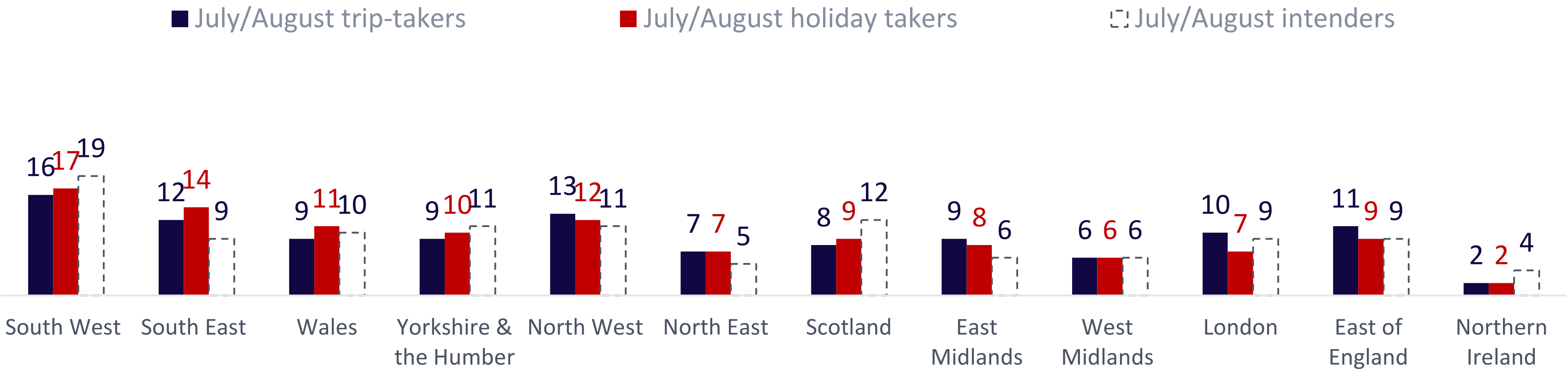


VB13f. In what type/s of accommodation did you stay in during your U.K. trip in summer?
Base: All trip-takers. Wave 14 and 15 All trip takers n=972; Holiday takers n=597. Trip intentions are based on Waves 5-8 conducted in June and early July before key restrictions were lifted .

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%. The South East of England exhibited the biggest uplift of holiday and overall trips compared to intentions.
- 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 trip takers in summer stayed compared to their intentions, Percentage Waves 14-15 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 trip-takers. Wave 14 and 15 All trip takers n=972; Holiday takers n=597. 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

- 39% intend to take the same or more U.K. short breaks compared to normal between now and the end of the year, a drop on Wave 14 (43%). 37% express this for longer breaks of 4+ nights, also a drop compared to Wave 14 (42%).
- 43% and 44% feel they are likely to take fewer U.K. short breaks and holidays respectively, 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 15, UK

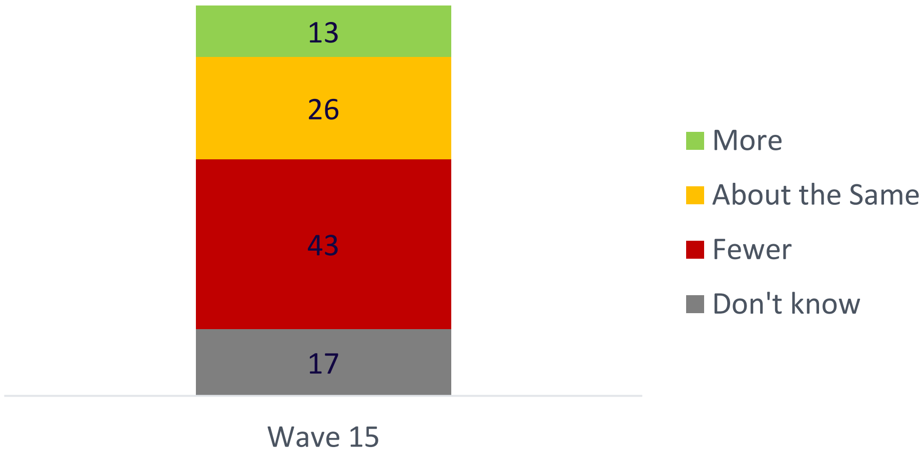
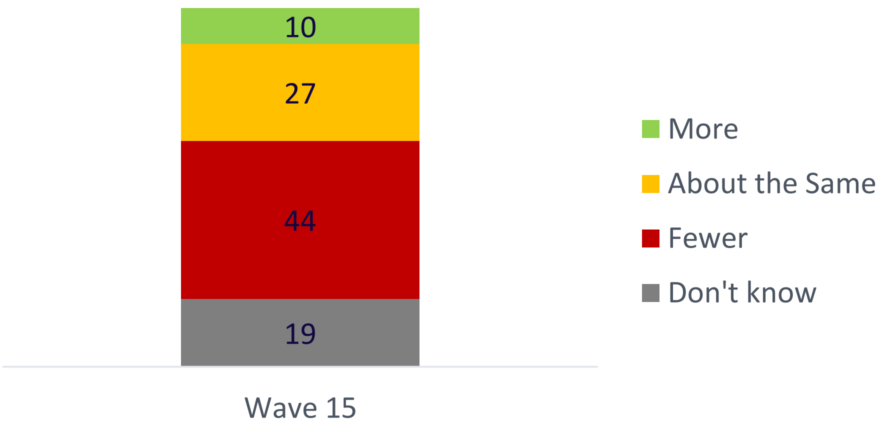


Figure 12. Number of UK longer breaks (4+ nights) over the rest of this year compared to normal, Percentage Wave 15, UK



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 15 n=1,760

Anticipated number of OVERSEAS trips this year compared to normal

- Around a quarter of U.K. adults intend to take more or about the same number of overseas short (1-3 nights) and longer breaks (4+ nights) by the end of the year compared to normal – a drop on Wave 14. Note, however, that both figures are dominated by those feeling they'll be taking about the same amount of trips – very few expect to take more.
- 51% 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 15, UK

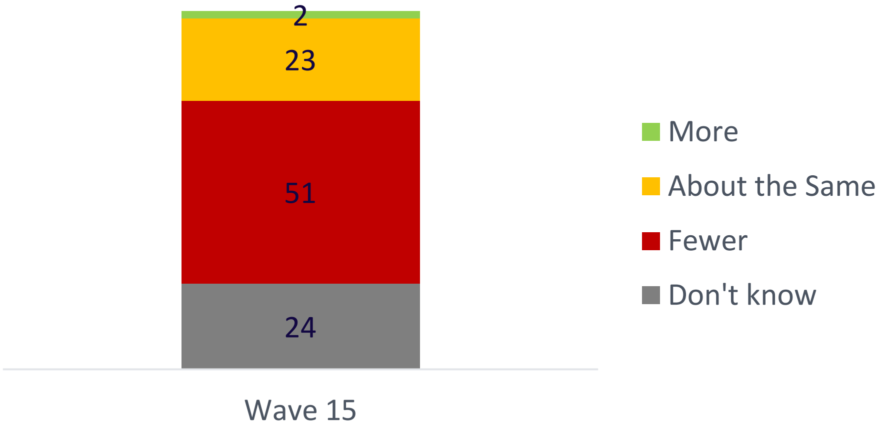
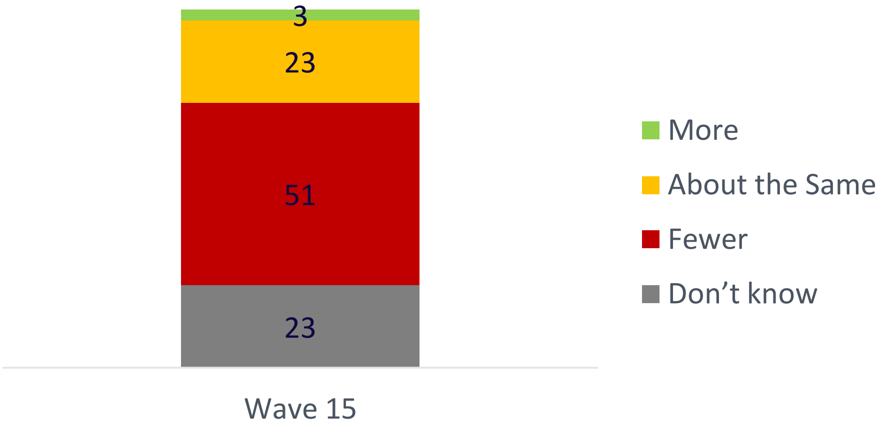


Figure 14. Number of OVERSEAS longer breaks (4+ nights) over rest of this year compared to normal, Percentage Wave 15, UK



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 15 n=1,760

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 30% in September, a percentage that is relatively consistent through to December. From January onwards confidence begins to climb, although it is not until April onwards that it is exhibited by the majority.
- Looking forward to next March, 48% are fairly or very confident in being able to take a trip that month. This is 7 points down versus Wave 14.

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

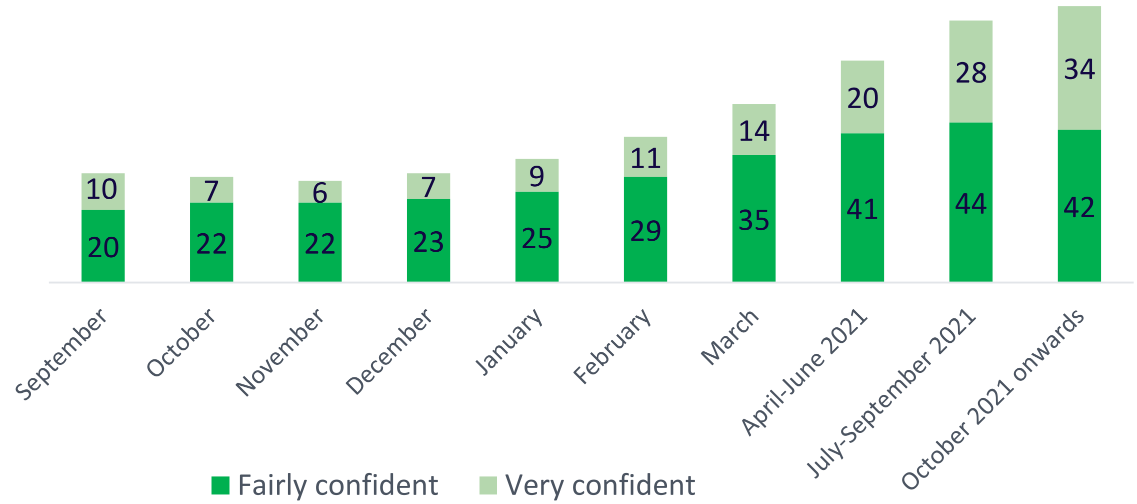
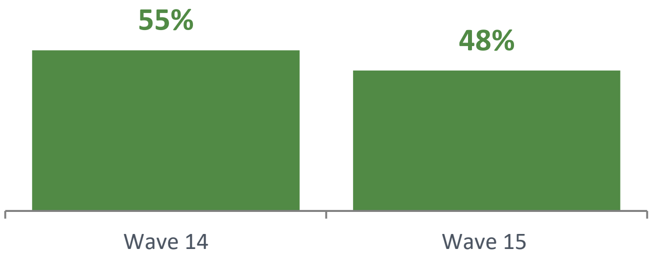


Figure 16. Confidence in taking a UK overnight trip in March 2021, Percentage wave-on-wave, UK



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 15 n=1,760.

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

- ‘Restrictions on travel from government’ is the leading reason U.K. adults do not feel confident about taking an overnight trip this autumn; at 49% a significant rise on the 39% that stated this in Wave 14. Concerns about catching COVID-19 has been narrowly pushed into second place at 48%.
- The picture is broadly similar for winter trips – concerns about catching COVID-19 and restrictions from government the two leading reasons.

Figure 17. Top 5 reasons for not being confident about travelling <u>in autumn*</u>, Percentage Wave 15, UK

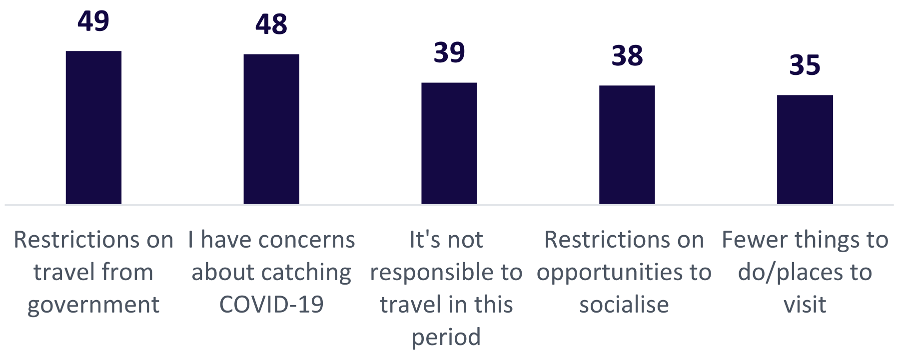
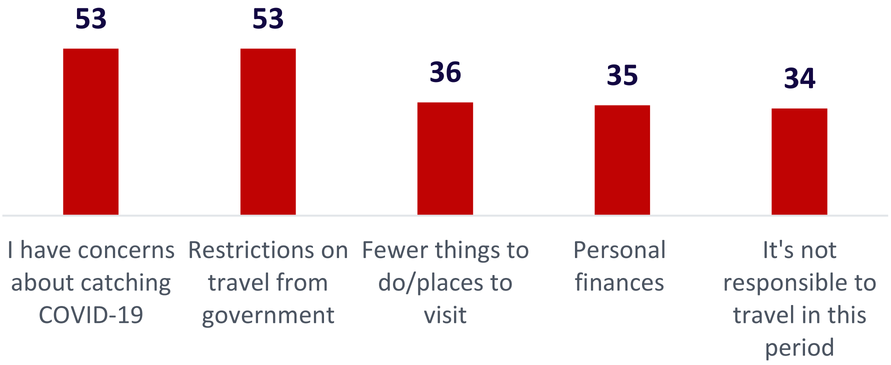


Figure 18. Top 5 reasons for not being confident about travelling <u>in winter*</u>, Percentage Wave 15, UK



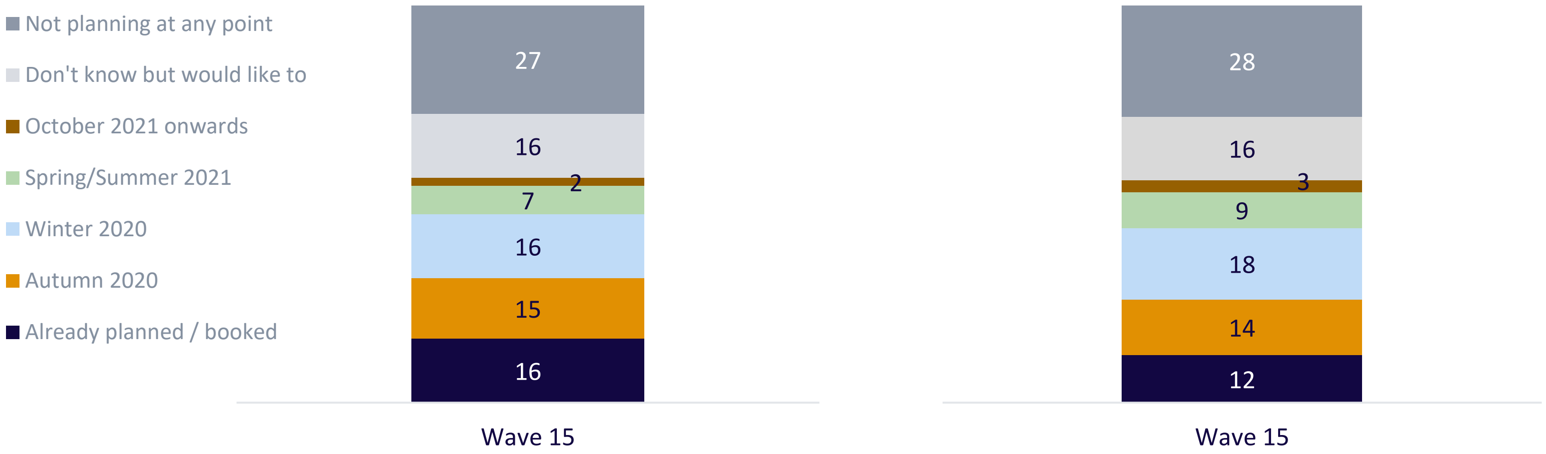
QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 15 respondents not confident about taking a break in Autumn n=296 and in Winter n=733. *Autumn is defined as September and October. Winter is defined as November to March 2021.

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

- 16% have already planned and 12% have already booked their next domestic overnight trip.
- A further 15% intend to plan, and 14% intend to book, their next trip during either September or October.

Figure 19. When anticipate PLANNING next UK overnight trip, Percentage Wave 15, UK

Figure 20. When anticipate BOOKING next UK overnight trip, Percentage Wave 15, UK

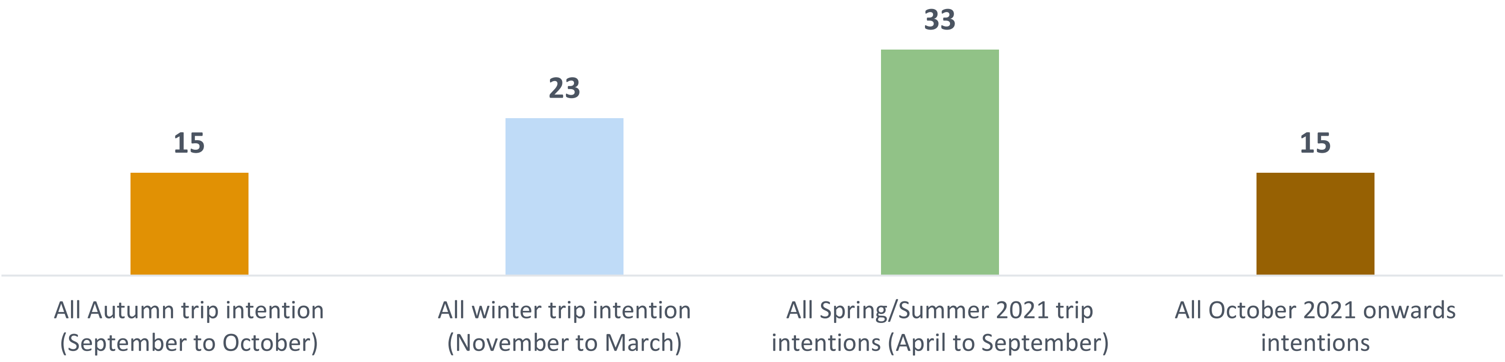


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 15 n=1,760

When anticipating going on U.K. overnight trip

- 15% of U.K. adults intend to take at least one domestic overnight trip by the end of October.
- Around 1 in 4 (23%) U.K. adults intend to take an overnight U.K. holiday or short break between November and March, and a third (33%) in the Spring or Summer of 2021.

Figure 22. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 15, 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 15 n=1,760

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

- 46% of autumn intenders have not yet planned their next overnight trip, with 56% still yet to book. A minority of winter intenders have either planned or booked their trips (23% and 16% respectively)

Figure 23. Proportion of Intenders that have already *planned* their trip, Percentage Wave 15, UK

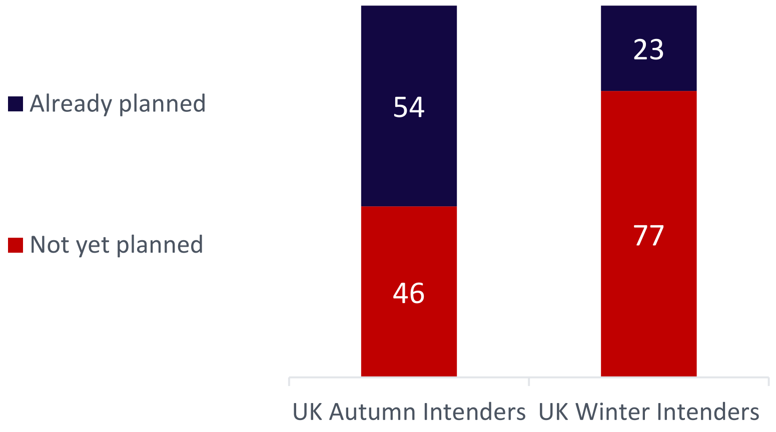
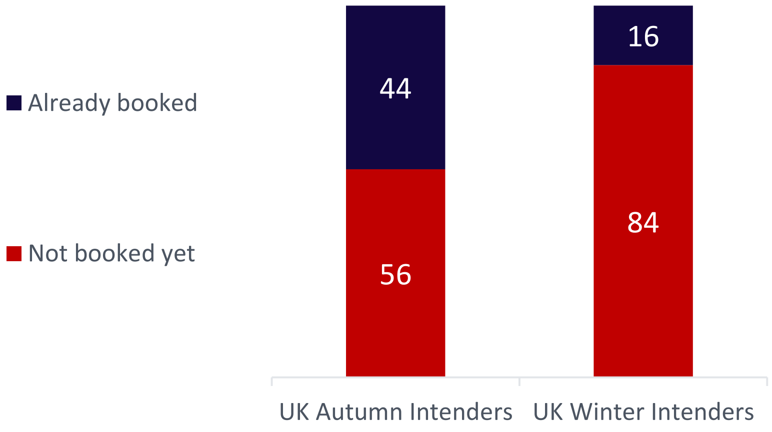


Figure 24. Proportion of Intenders that have already *booked* their trip, Percentage Wave 15, UK

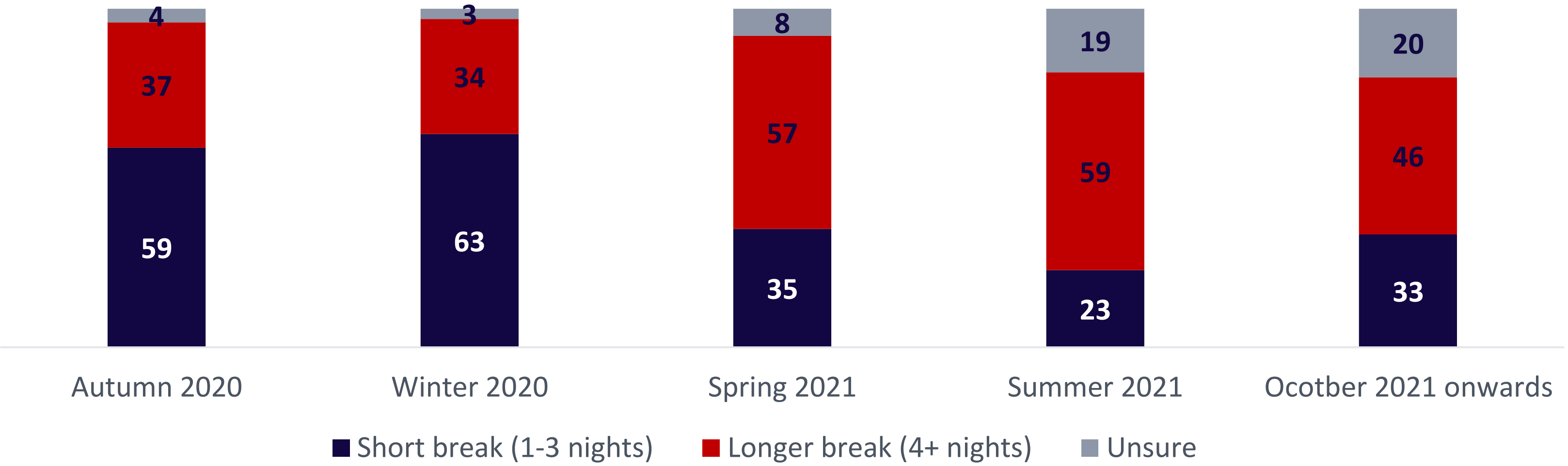


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 15 respondents planning on taking a holiday or short break in the UK by October n=268 and from November to March n=280

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 Spring and Summer 2021, when longer breaks, such as holidays, make up the majority.

Figure 25. Length of next UK holiday or short break by time period, Percentage Wave 15, UK



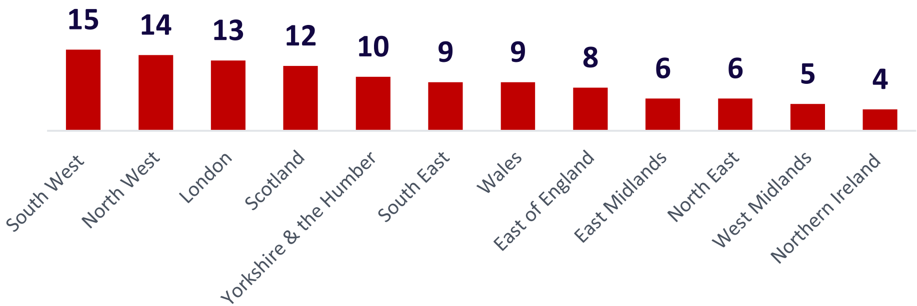
QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 15 respondents intending to take next holiday in each time period Autumn 2020 n=268, Winter 2020 n=280; Spring 2021 n=156; Summer 2021 n=186; October 2021 onwards n= 85

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

- The South West remains significantly more likely than any other region to receive visitors in Autumn this year (19% intending to visit). This is followed by Yorkshire & the Humber (14%), the North West of England (12%) and Scotland (also with 12%).
- London almost doubles its share among winter trip intenders to 13%, just behind the South West and North West with 15% and 14% respectively.

Figure 26. Where planning on staying on next UK overnight trip in Autumn, Percentage Waves 14-15, UK

Figure 27. Where planning on staying on next UK overnight trip in Winter, Percentage Waves 14-15, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 14-15 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=499 and for Winter (November-March) n=535.

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, possibly linked to the corresponding rise in intention to visit cities or large towns

Figure 28. Top 5 main modes of travel to destination for trip in Autumn, Percentage Wave 15, UK

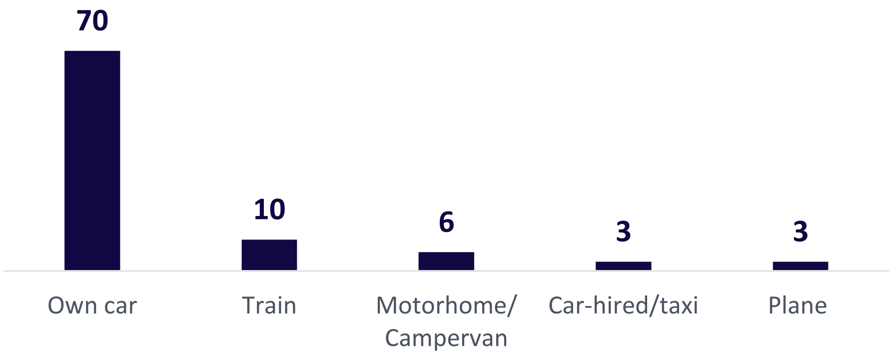
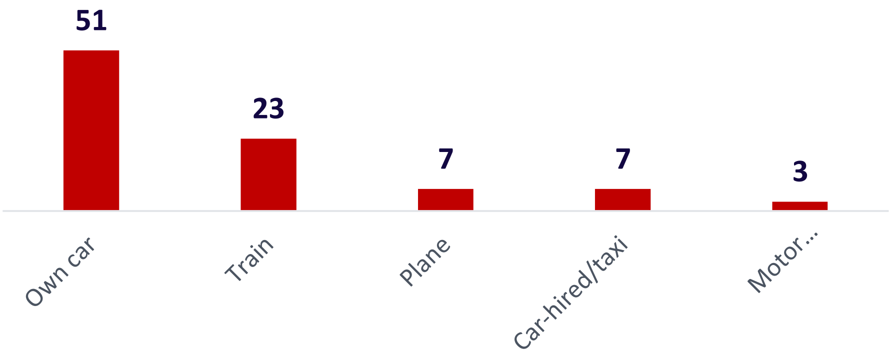


Figure 29. Top 5 main modes of travel to destination for trip in Winter Percentage Wave 15, UK



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=268 and from Winter (November-March) n=280

Type of destination for next U.K. overnight trip

- ‘Countryside or village’ (39%) is significantly ahead of ‘traditional coastal/seaside town’ (29%) as the main destination type for a trip this autumn. ‘City or large town’ (24%) and ‘rural coastline’ (20%) are the next most preferred destination types.
- Among winter intenders, ‘city or large town’ is the leading destination type (36%), followed by ‘countryside or village’ (33%).

Figure 30. Main type of destination for trip in Autumn, Percentage Waves 14-15, UK

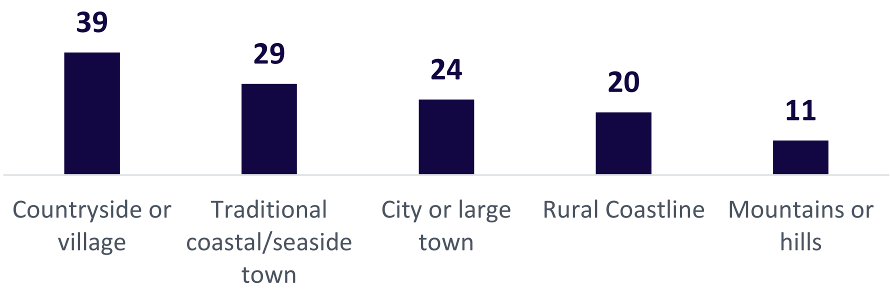


Figure 31. Main type of destination for trip in Winter, Percentage Waves 14-15, UK

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 14-15 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=499 and for Winter (November-March) n=535.

Type of accommodation for next U.K. overnight trip

- ‘Hotel/motel/inn’ is the leading type of accommodation chosen for trips this autumn, ahead of ‘caravan/camping’ and ‘commercial rental’.
- Staying at ‘a private home’ leads during winter, followed by ‘hotel/motel/inn’.

Figure 32. Accommodation planning on staying in on next UK overnight trip in Autumn, Net percentage Waves 14-15

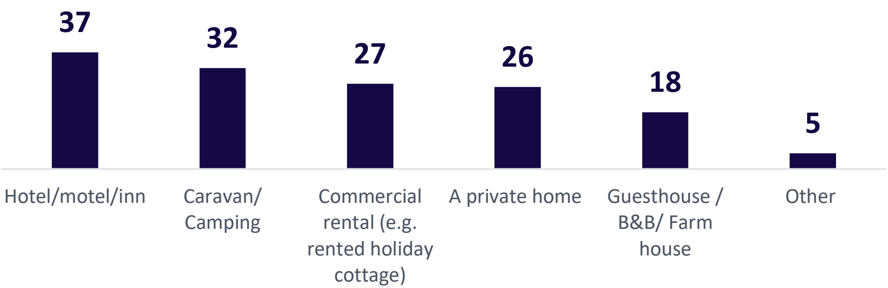
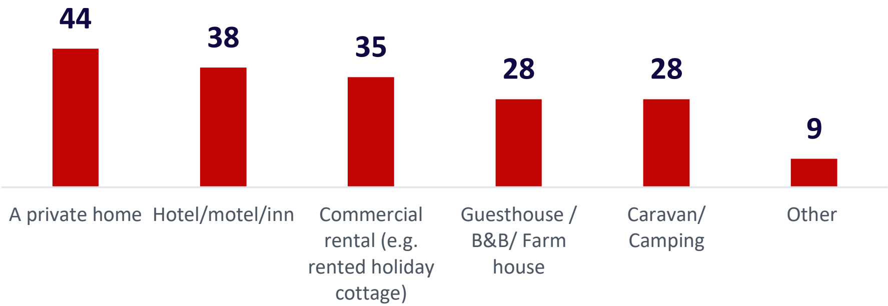


Figure 33. Accommodation planning on staying in on next UK overnight trip in Winter, Net percentage Waves 14-15

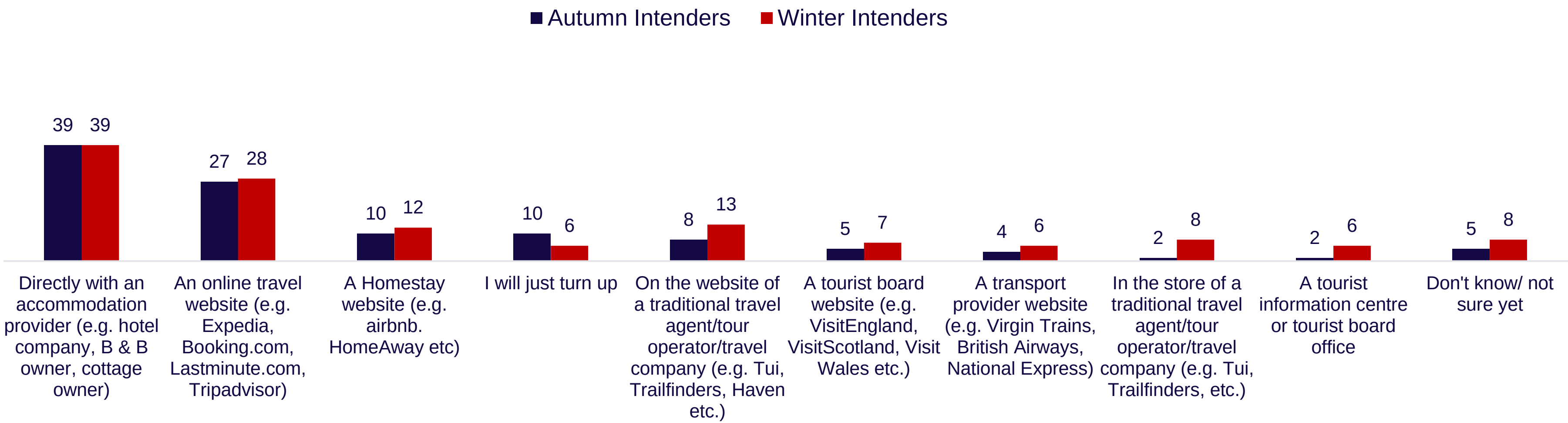


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 14-15 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=499 and for Winter (November-March) n=535.

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

- Both autumn and winter intenders are most likely to book their accommodation directly with an accommodation provider, followed by an online travel website.

Figure 34. Accommodation booking channel for next trip in autumn and winter, Percentage Wave 15, U.K.

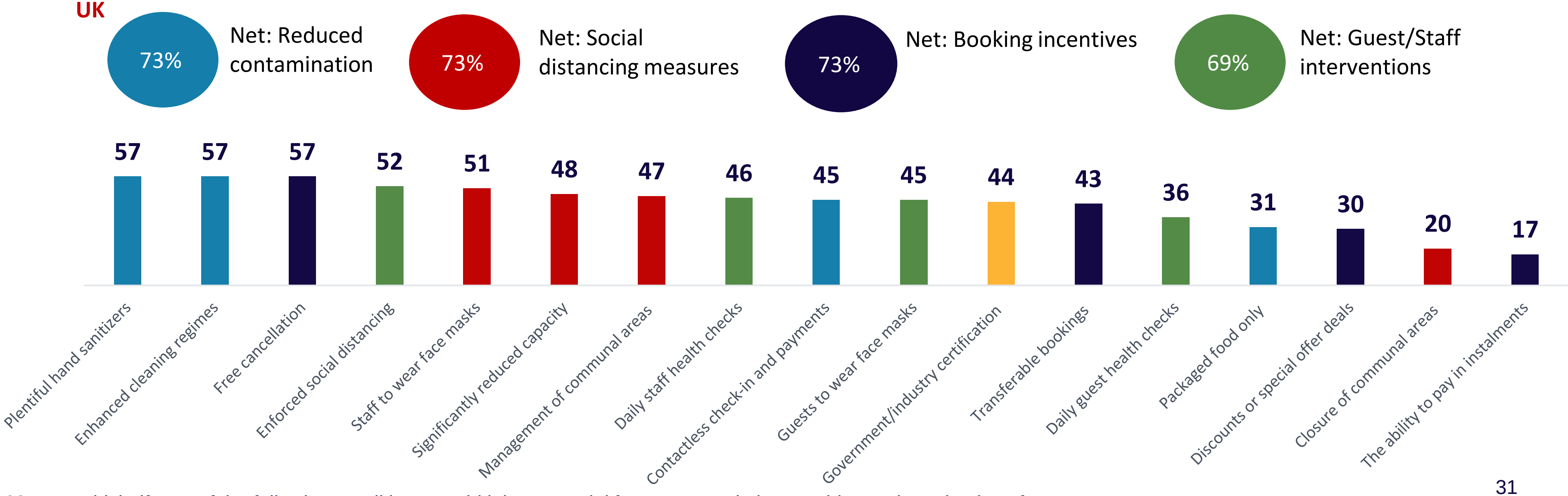


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 15 respondents planning on taking a holiday or short break in the UK for Autumn (September-October) n=268 and for Winter (November-March) n=280.

Conditions essential for people to stay in accommodation this summer

- Steps to reduce cross-contamination and ensure social distancing (both net 73%) are the joint leading broad assurances the public need when planning a stay in accommodation in the coming months.
- ‘Plentiful hand sanitisers’, ‘enhanced cleaning regimes’, and ‘free cancellation’ are the top three individual reasons, each on 57%.

Figure 35. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Wave 15, UK

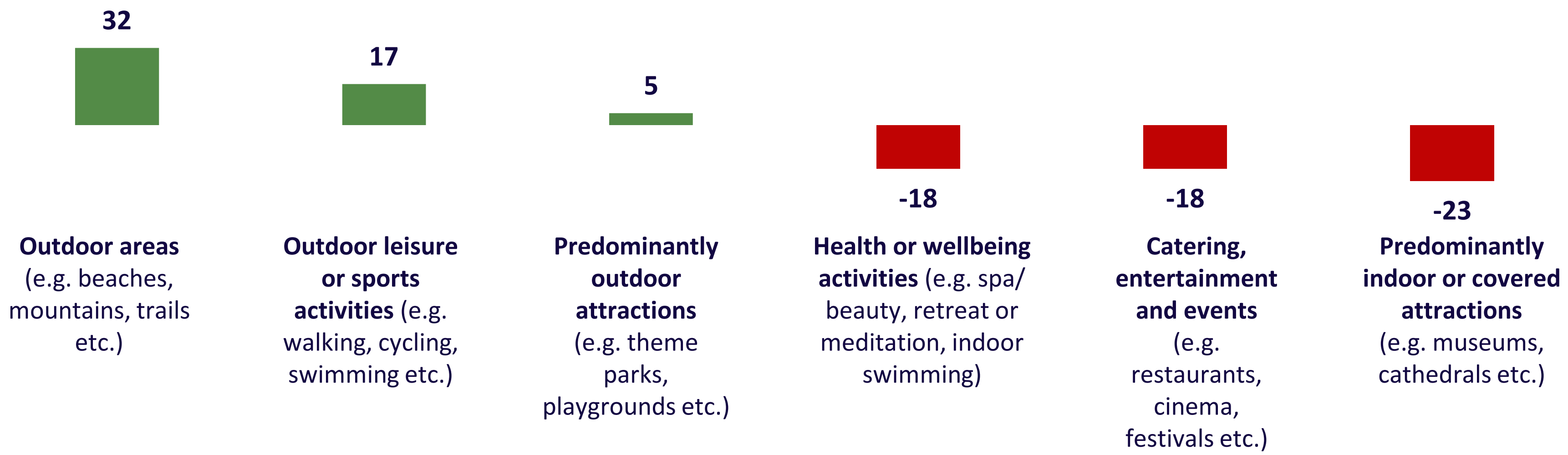


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 15 respondents n=1,760.

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 +17) and outdoor visitor attractions (+5).
- Health or wellbeing activities (net -18), catering, entertainment and events (also net -18), and indoor attractions (net -23) remain most likely to attract fewer visitors/engagement than normal once all restrictions are lifted..

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 15, 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 15 respondents n=1,760.

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 15 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-14 where appropriate. Wave 15 fieldwork was conducted between 14th to 18th 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.