Introduction

• VisitBritain has commissioned a weekly tracking survey to understand domestic intent to take 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 will address: 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.

• The COVID-19 consumer sentiment tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+. The survey will be repeated across a 13 week period with the first wave published on 1 June 2020.

• This report is based on ‘England Intenders’ – adults within the UK population who intend to go on a holiday or short break in England in the next year.
  – The base size of this group for this week is 617.

• The results will be made publicly available and updated each week at the following website: https://www.visitbritain.org/covid-19-consumer-sentiment-tracker
# Week 1: Scorecard of Key Metrics – England Intenders

**Table 1. Top line Metrics (Note: all scores are based on U.K. adults who intend to take a short break or holiday in England in the next year)**

<table>
<thead>
<tr>
<th>General sentiment scores</th>
<th>Week 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>National mood (average score out of 10)</td>
<td>7.0</td>
</tr>
<tr>
<td>Perceptions of the situation regarding Covid-19 (proportion stating ‘worst has passed’)</td>
<td>24%</td>
</tr>
<tr>
<td>Risk score: Comfort in undertaking a range of activities (1-4 confidence score)</td>
<td>2.3</td>
</tr>
<tr>
<td>Normality score (proportion expecting normality by August)</td>
<td>58%</td>
</tr>
<tr>
<td>The main reason for not feeling confident about taking a trip between June-August</td>
<td>Gov’t guidance on travel restrictions</td>
</tr>
<tr>
<td>Anticipated number of U.K. short breaks compared to normal (% more minus fewer)</td>
<td>-28</td>
</tr>
<tr>
<td>Anticipated number of U.K. holidays compared to normal (% more minus fewer)</td>
<td>-29</td>
</tr>
<tr>
<td>UK near-term holiday/short break confidence (June-August very/fairly confident)</td>
<td>22</td>
</tr>
<tr>
<td>UK medium-term holiday/short break confidence (Sept-Dec very/fairly confident)</td>
<td>52</td>
</tr>
<tr>
<td>UK long-term holiday/short break confidence (Jan 2021 onwards very/fairly confident)</td>
<td>78</td>
</tr>
<tr>
<td>Proportion of England intenders going on an England short break or holiday between June and September</td>
<td>36%</td>
</tr>
<tr>
<td>Split between holiday / short break for next trip between June and September</td>
<td>44%/47% (9% don’t know)</td>
</tr>
<tr>
<td>Leading U.K. destination likely to stay in between June and September (Top 1)</td>
<td>South West England</td>
</tr>
<tr>
<td>Main type of destination likely to stay in between June and September (Top 1)</td>
<td>Countryside or Village</td>
</tr>
<tr>
<td>Main accommodation type likely to stay in between June and September (Top 1)</td>
<td>Serviced accommodation (e.g. hotel/B&amp;B)</td>
</tr>
<tr>
<td>Place/activity generating highest engagement compared to normal</td>
<td>Outdoor areas</td>
</tr>
<tr>
<td>Place/activity generating lowest engagement compared to normal</td>
<td>Entertainment and Events</td>
</tr>
</tbody>
</table>

**General short break and holiday intentions**

**Specific short break and holiday plans**

**Broader leisure activity**
The national mood and perceptions of the situation in relation to COVID-19

- 20% of England Intenders described their mood as 9 or 10 out of 10
- 76% indicated they feel things are going to stay the same or the worst is still to come in relation to the COVID-19 situation

Q5: How would you rate, between 0 and 10, your mood today? 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: ‘England Intenders’ n=617
Perceptions of when things will return to ‘close to normal’

- 17% believe that life will return to ‘something close to normal’ by August, rising to 58% by the end of the year.

Q16: Given what you know today, when do you think life will return to something close to normal?
Base: ‘England Intenders’ n=617

Figure 3. Perceptions of when things will return ‘close to normal’
Percentage, England Intenders

Figure 4. Proportion expecting normality by August, Percentage, England Intenders

Figure 5. Proportion expecting normality by December, Percentage, England Intenders
Appetite for Risk

- The ‘appetite for risk’ score stands at 2.3 out of 4, with 4 representing ‘absolute comfort’
- Comfort is highest for walks outdoors in a country park/trail (3.1), while people exhibit the lowest levels eating at a restaurant (2.0) or using public transport (1.9)

Figure 6. Comfort in conducting a range of activities separately and combined, Average Score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, England Intenders

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: ‘England Intenders’ n=617 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: Risk average score’ is calculated as a straight average of the four scores
Anticipated number of U.K. trips this year compared to normal

- Compared to normal, England Intenders anticipate taking fewer short breaks (net -28) and holidays of 4+ nights (net -29) in the UK between now and year end.

Figure 7. Number of short breaks (1-3 nights) in England over the rest of this year compared to normal, Percentage, England Intenders

![Short Breaks Chart]

Figure 8. Number of holidays (4+ nights) in England over the rest of this year compared to normal, Percentage, England Intenders

![Holidays Chart]

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: ‘England Intenders’ n=617
Anticipated number of OVERSEAS trips this year compared to normal

- It’s also anticipated that fewer overseas short breaks (-51) and holidays (-48) will be taken by the end of the year compared to normal.

Figure 9. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage, England Intenders

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

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: ‘England Intenders’ n=617
When anticipating to plan, book or go on next short break or holiday

- 66% anticipate planning their trip by September, and 55% anticipate booking it
- 10% intend to take their trip either in July or July, 36% by September. 64% plan on taking their trip in October or later

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: ‘England Intenders’ n=617

Figure 11. When anticipate PLANNING next England holiday or short break, Percentage, England Intenders

Figure 12. When anticipate BOOKING next England holiday or short break, Percentage, England Intenders

Figure 13. When anticipate GOING on next England trip, Percentage, England Intenders
When planning on taking next England holiday or short break, by trip length

- Trips to England are broadly split between short breaks and holidays. Although there are some differences by time frame, these are not statistically significant.

Figure 14. Length of next holiday or short break by time period, Percentage, England Intenders
Where planning on staying during next England short break or holiday

- The South West, the South East and London are the three regions of England likely to attract the highest proportion of domestic holiday-makers between June and September.
- From October onwards, the South West, London and the North West are the three areas that index the highest.

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in England between June and September n=224 and from October onwards n=393.

* Note: An overnight trip to England may also include visits to other nations, hence the inclusion of Scotland and Wales in Figs.15-16.
Main mode of transport for next England short break or holiday

- Across both review periods, ‘own car’ is by far the predominant form of transport for those intending to take a holiday or short break in England.
- This is followed by ‘train’, while ‘plane’ leads the sub-10% modes of transport.

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?

Base: All respondents planning on taking a holiday or short break in England between June and September n=224 and from October onwards n=393
Type of destination for next England short break or holiday

- Countryside or village, traditional coastal/seaside town and city or large town are the three leading destination types for a short break or holiday in England between June - September
- Countryside or village remains the most popular choice from October onwards, but city or large town rises to the second most popular

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in England between June and September n=224 and from October onwards n=393
Type of accommodation for next England short break or holiday

- Serviced accommodation (e.g. hotels and B&Bs) and commercial rental (e.g. rental holiday homes/flats) are the two types of accommodation England holiday-makers are most likely to stay in between June and September
- Serviced accommodation indexes significantly higher for trips from October onwards

Figure 21. Accommodation planning on staying in on next overnight trip in June to September, Net percentage, England Intenders

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>June to September</th>
<th>October onwards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced accommodation</td>
<td>51</td>
<td>63</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>39</td>
<td>36</td>
</tr>
<tr>
<td>A private home</td>
<td>39</td>
<td>32</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>Other</td>
<td>13</td>
<td>9</td>
</tr>
</tbody>
</table>

Figure 22. Accommodation planning on staying in on next overnight trip from October onwards, Net percentage, England Intenders

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in England between June and September n=224 and from October onwards n=393
Confidence in the ability to take a U.K. short break or holiday

- 17% feel confident going on a domestic holiday or short break in June this year, rising to 27% in July to August, 47% in September to October, and 57% in November to December. 78% would feel confident taking a trip from January 2021 onwards.

Figure 23. Confidence in taking a short break or holiday in England across a range of different months, Percentage, England Intenders.

<table>
<thead>
<tr>
<th>Month</th>
<th>Fairly Confident</th>
<th>Very Confident</th>
</tr>
</thead>
<tbody>
<tr>
<td>June this year</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>July-August this year</td>
<td>5</td>
<td>22</td>
</tr>
<tr>
<td>September-October this year</td>
<td>10</td>
<td>37</td>
</tr>
<tr>
<td>November-December this year</td>
<td>17</td>
<td>40</td>
</tr>
<tr>
<td>January 2021 onwards</td>
<td>35</td>
<td>43</td>
</tr>
</tbody>
</table>

QVB7a. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on a UK short break or holiday in the following months? Base: 'England Intenders' n=617
Reasons for not feeling confident about taking trips in the U.K. – Top 5

- ‘Restrictions on travel imposed by government’ is the leading reason cited for lack of confidence in taking trips in the U.K. between June - August.
- Concerns about catching COVID-19 is the leading reason from September onwards, followed by ‘fewer opportunities to eat/drink out’ and ‘fewer things to do/places to visit.’

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: England intenders not confident about taking a break between June and August n=250 and from September onwards n=266
General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal, followed by outdoor leisure or sports activities and outdoor attractions. Indoor attractions, health or wellbeing activities and entertainment and events are likely to attract fewer visitors/engagement than normal.

Figure 26. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’, England Intenders

<table>
<thead>
<tr>
<th>Outdoor areas (e.g. beaches, mountains, trails etc.)</th>
<th>Outdoor leisure or sports activities (e.g. walking, cycling, swimming etc.)</th>
<th>Predominantly outdoor attractions (e.g. theme parks, playgrounds etc.)</th>
<th>Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)</th>
<th>Health or wellbeing activities (e.g. spa/beauty, retreat or meditation, indoor swimming)</th>
<th>Entertainment and events (e.g. restaurants, cinema, festivals etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
<td>27</td>
<td>18</td>
<td>-2</td>
<td>-4</td>
<td>-6</td>
</tr>
</tbody>
</table>

QVB9a/b B10a/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: 'England Intenders' n=617
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 it representative of the U.K. overall and within each nation.

• This report presents findings from Week 1 of the COVID-19 consumer weekly tracker. It focuses on ‘England Intenders’ – adults within the UK population who intend to go on a holiday or short break within England in the next year*. Week 1 fieldwork was conducted between 18\textsuperscript{th} May and 22\textsuperscript{nd} May 2020.

*Note: Although all of these respondents intend to visit England for a holiday or short break, some will also intend to visit other parts of the UK on the same trip
Master Data Tables

• To access the Master Data Tables, please open the report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.