COVID-19 Consumer Weekly Tracker

Week 2
9th June 2020
England Results
Introduction

• VisitEngland has commissioned a weekly Covid-19 consumer sentiment 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 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.

• The tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+, with boosts for Scotland and Wales. 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 U.K. population who intend to go on a holiday or short break in England in the next year.
  – In week 2, 562 respondents qualified based on this criteria.

• 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 2: Scorecard of Key Metrics (1) (based on exclusively England intenders)

#### Table 1a. Top line Metrics
*Represents a significant change on previous week*

<table>
<thead>
<tr>
<th>Metric Description</th>
<th>Week 1</th>
<th>Week 2</th>
<th>W-o-W Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>National mood (average score out of 10)</td>
<td>7.0</td>
<td>7.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Perceptions of the situation regarding Covid-19 (proportion stating ‘worst has passed’)</td>
<td>23%</td>
<td>36%</td>
<td>+13*</td>
</tr>
<tr>
<td>Risk score: Comfort in undertaking a range of activities (1-4 comfort score)</td>
<td>2.4</td>
<td>2.4</td>
<td>0.0</td>
</tr>
<tr>
<td>Normality score (proportion expecting normality by September)</td>
<td>38%</td>
<td>37%</td>
<td>-1</td>
</tr>
<tr>
<td>The main reasons for not feeling confident about taking a trip between June-August (Top 2)</td>
<td>1. Fewer opportunities to eat/drink out 2. Gov’t guidance on travel restrictions</td>
<td>1. Fewer opportunities to eat/drink out 2. Gov’t guidance on travel restrictions</td>
<td>No change</td>
</tr>
<tr>
<td>Anticipated number of U.K. short breaks compared to normal (% more minus fewer)</td>
<td>-29</td>
<td>-23</td>
<td>+6*</td>
</tr>
<tr>
<td>Anticipated number of U.K. holidays compared to normal (% more minus fewer)</td>
<td>-30</td>
<td>-28</td>
<td>+2</td>
</tr>
<tr>
<td>UK near-term holiday/short break confidence (June /July-August confident)</td>
<td>25%/35%</td>
<td>19%/36%</td>
<td>-6/+1</td>
</tr>
<tr>
<td>UK medium-term holiday/short break confidence (Sept to Oct/Nov-Dec confident)</td>
<td>52%/64%</td>
<td>55%/69%</td>
<td>+3/+5</td>
</tr>
<tr>
<td>UK long-term holiday/short break confidence (Jan 2021 onwards confident)</td>
<td>78%</td>
<td>86%</td>
<td>+8*</td>
</tr>
<tr>
<td>Proportion going on a UK short break or holiday between June and September</td>
<td>37%</td>
<td>41%</td>
<td>+4</td>
</tr>
<tr>
<td>Split between holiday / short break / don’t know for next trip between June and September</td>
<td>45%/50% (4% don’t know)</td>
<td>38%/57% (5% don’t know)</td>
<td>-7/+7/+1</td>
</tr>
</tbody>
</table>
Week 2: Scorecard of Key Metrics (2) (based on exclusively England intenders)

Table 1b. Top line Metrics

<table>
<thead>
<tr>
<th>Specific short break and holiday plans</th>
<th>Week 1</th>
<th>Week 2</th>
<th>W-o-W Change</th>
</tr>
</thead>
</table>
| Leading England destination likely to stay in between June and September (Top 3) | 1. South West  
2. South East  
3. North West | 1. South West  
2. North West  
3. London | SE drops out of top 3 |
| Main type of destination likely to stay in between June and September (Top 3) | 1. Countryside or village  
2. Traditional coastal/seaside town  
3. City/Large town | 1. Traditional coastal/seaside town  
2. City/Large town  
3. Countryside or village | No significant changes |
| Main accommodation type likely to stay in between June and September (Top 3) | 1. Hotel/motel/inn  
2. Caravan/Camping  
3. Commercial rental | 1. Hotel/motel/inn  
2. Private home  
3. Commercial rental | No significant changes |

<table>
<thead>
<tr>
<th>Broader leisure activity</th>
<th>Week 1</th>
<th>Week 2</th>
<th>W-o-W Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place/activity generating highest engagement compared to normal</td>
<td>Outdoor areas</td>
<td>Outdoor areas</td>
<td>No significant changes</td>
</tr>
<tr>
<td>Place/activity generating lowest engagement compared to normal</td>
<td>Entertainment and Events</td>
<td>Predominantly indoor or covered attractions</td>
<td>No significant changes</td>
</tr>
</tbody>
</table>
**The national mood and perceptions of the situation in relation to COVID-19**

- 19% of exclusive England intenders describe their mood as 9 or 10 out of 10 which is relatively consistent with 20% in week 1. Also consistent with week 1, they rate their mood as 7.0 out of 10 on average.

**Figure 1. Current mood out of 10, Percentage week-on-week, England Intenders**

<table>
<thead>
<tr>
<th>Mean Average</th>
<th>Week 1</th>
<th>Week 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.0</td>
<td>20</td>
<td>19</td>
</tr>
<tr>
<td>45</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Q5: How would you rate, between 0 and 10, your mood today? Base: Exclusive England Intenders. Week 1 n=538; Week 2 n=562
The national mood and perceptions of the situation in relation to COVID-19

- 36% of England Intenders indicated they feel the worst has passed in relation to the COVID-19 situation, significantly higher than the 23% that stated this in week 1.

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

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: Exclusive England Intenders. Week 1 n=538; Week 2 n=562
Perceptions of when things will return to ‘close to normal’

- 37% believe that life will return to ‘something close to normal’ by September, relatively consistent with 38% in week 1.

Figure 3. Perceptions of when things will return ‘close to normal’
Percentage Week 2, England Intenders

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

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

Q16: Given what you know today, when do you think life will return to something close to normal?
Base: Exclusive England Intenders. Week 1 n=538; Week 2 n=562
Appetite for Risk

- The 'appetite for risk' score stands at 2.4 out of 4 (4 representing 'absolute comfort'), which is level with week 1.
- As in week 1, comfort is highest for walks outdoors in a country park/trail (3.2), while people exhibit the lowest level using public transport (1.9).

Figure 6. Comfort in 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, England Intenders.
Confidence in the ability to take a U.K. short break or holiday

- Of exclusive England intenders that would ordinarily book a domestic trip in these time periods, 17% would feel confident that they would be able to do so in June, rising to 36% in July to August, 55% in September to October, and 68% in November to December. 85% would feel confident taking a trip from January 2021 onwards.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 2, England Intenders
‘Fewer opportunities to eat/drink out’ is the leading reason cited for lack of confidence in taking trips in the U.K. between June and August (47% stating this). ‘Concerns about catching COVID-19’ (51%) is the biggest factor from September onwards followed by ‘restrictions on travel from government’ significantly below it.
Anticipated number of U.K. trips this year compared to normal

- Compared to normal, England Intenders anticipate taking fewer short breaks (net -23) and holidays of 4+ nights (net -28) in the UK between now and year end.

Figure 10. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Week 2, England Intenders

Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 2, England Intenders

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: Exclusive England Intenders. Week 2 n=562
Anticipated number of OVERSEAS trips this year compared to normal

- England Intenders also anticipate taking fewer overseas short breaks (-48) and holidays (-45) by the end of the year compared to normal.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 2, England Intenders

Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 2, 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: Exclusive England Intenders. Week 2 n=562
When anticipating to plan or book next England short break or holiday

- 69% of England intenders have either already planned or intend to plan a short break or holiday by September (for booking it’s 59%)

Figure 14. When anticipate **PLANNING** next UK holiday or short break, Percentage Week 2, England Intenders

- Don’t know/Not sure/No plans: 4%
- October or later: 27%
- September: 11%
- August: 12%
- July: 10%
- June: 15%
- Already planned / booked: 21%

Figure 15. When anticipate **BOOKING** next UK holiday or short break, Percentage Week 2, England Intenders

- Don’t know/Not sure/No plans: 3%
- October or later: 37%
- September: 12%
- August: 15%
- July: 9%
- June: 9%
- Already planned / booked: 15%
When anticipating to go on next England short break or holiday

- 41% anticipate actually going on their next England short break or holiday by this September, higher than the 38% intending to do so in week 1

**Figure 16. When anticipate GOING on next UK trip, Percentage Week 2, England Intenders**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Week 1</th>
<th>Week 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>July</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>August</td>
<td>16</td>
<td>38%</td>
</tr>
<tr>
<td>September</td>
<td>59</td>
<td>41%</td>
</tr>
<tr>
<td>Don't know/Not sure/No plans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>October or later</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 17. Proportion expecting to go on holiday by September, Percentage week-on-week, England Intenders**

- Week 1: 38%
- Week 2: 41%

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: Exclusive England Intenders. Week 1 n=538; Week 2 n=562
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 where short breaks are more popular, this is only statistically significant in September.

Figure 18. Length of next holiday or short break by time period, Percentage Week 2, England Intenders

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All exclusive England respondents intending to take next holiday in each time period June n=26*, July n=32*, August n=83, September n=89, October and beyond n=332
*Indicates small base size. Please treat with caution.
Where planning on staying on next England short break or holiday

- Amongst England Intenders, the South West, the North West and London are the three regions of England likely to attract the highest proportion of domestic holiday-makers between June and September; the South East dropping down the list
- From October onwards, the South West, London and the North West are the three areas that index the highest, similarly to week 1

Figure 19. Where planning on staying on next overnight trip in June to September, Percentage Week 2, England Intenders

Figure 20. Where planning on staying on next overnight trip from October onwards, Percentage Week 2, England Intenders

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=230 and from October onwards n=332
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 a holiday or short break in England.
- This is followed by ‘train’, while ‘hire car’ and ‘plane’ lead 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=230 and from October onwards n=332
Type of destination for next England short break or holiday

- Countryside or village drops down to third behind traditional coastal/seaside town and city or large town as the three leading destination types for a short break or holiday in England between June – September. However, the differences between the three are not statistically significant.
- City or large town is again the most popular choice from October onwards, but coastal towns are now preferred to the countryside.

Figure 23. Main type of destination for trip in June to September, Percentage Week 2, England Intenders

- Traditional coastal/seaside town: 32%
- City or large town: 30%
- Countryside or village: 28%
- Rural coastline: 23%
- Mountains or hills: 10%

Figure 24. Main type of destination for trip from October onwards, Percentage Week 2, England Intenders

- City or large town: 34%
- Traditional coastal/seaside town: 33%
- Countryside or village: 30%
- Rural coastline: 21%
- Mountains or hills: 13%

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=230 and from October onwards n=332
Type of accommodation for next England short break or holiday

- Hotels/motels/inns and private homes are the two types of accommodation England holiday-makers are most likely to stay in between June and September.
- Hotels/motels/inns indexes higher for trips from October onwards, and commercial rental (e.g. rental holiday homes/flats) is second along with private homes.

Figure 25. Accommodation planning on staying in on next overnight trip in June to September, Net percentage Week 2, England Intenders

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Week 2, England Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / motel / inn</td>
<td>37</td>
</tr>
<tr>
<td>A private home</td>
<td>34</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>31</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>29</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>19</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
</tr>
</tbody>
</table>

Figure 26. Accommodation planning on staying in on next overnight trip from October onwards, Net percentage Week 2, England Intenders

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Week 2, England Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / motel / inn</td>
<td>45</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>37</td>
</tr>
<tr>
<td>A private home</td>
<td>37</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>27</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>25</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
</tr>
</tbody>
</table>

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=230 and from October onwards n=332
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. Health or wellbeing activities and entertainment and events are likely to attract fewer visitors/engagement than normal and indoor attractions falls even further down.

Figure 27. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Week 2, 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.) playgrounds etc.)</th>
<th>Predominantly outdoor attractions (e.g. theme parks, playgrounds 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>
<th>Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
<td>27</td>
<td>15</td>
<td>-3</td>
<td>-5</td>
<td>-11</td>
</tr>
</tbody>
</table>

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: Exclusive England Intenders. Week 2 n=562
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 2 of the COVID-19 consumer weekly tracker, with comparisons to Week 1 where appropriate. Week 2 fieldwork was conducted between 25th May and 29th May 2020.
- The report focusses on ‘England Intenders’ – UK residents whose next domestic holiday or short break will be in England.
  - The number of respondents in week 2 which qualified under this definition is 562.
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.