COVID-19 Consumer Weekly Tracker

Week 3

12th June 2020

England Results

Introduction

- VisitEngland has commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnights 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 'Exclusive England Intenders'.** These are adults in the U.K. population who intend for their next domestic holiday or short break within the next year to be in England.
  - In week 3, 613 respondents qualified based on this criteria.
- The results are made publicly available and updated each week at the following website:

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

Week 3: Scorecard of Key Metrics (1) – England Intenders

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Week 2	Week 3	Weekly Shift
National mood (average score out of 10)	7.0	6.9	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	36%	28%	-8*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.4	2.5	+0.1
Normality score (proportion expecting normality by September)	37%	36%	-1
The main reasons for not feeling confident about taking a trip between June-August (Top 2)	1. Fewer opportunities to eat/drink out 2. Gov't guidance on travel restrictions	1. Fewer opportunities to eat/drink out 1. Gov't guidance on travel restrictions	No change

Table 2. Top line Metrics – General short break and holiday intentions

Key Metrics	Week 2	Week 3	Weekly Shift
Anticipated number of U.K. short breaks compared to normal (% net)	-23	-25	-2
Anticipated number of U.K. holidays compared to normal (% net)	-28	-29	-1
UK near-term holiday/short break confidence (June/July-August confident)	19%/36%	21%/36%	+2/0
UK medium-term holiday/short break confidence (Sept to Oct/Nov-Dec confident)	55%/69%	62%/71%	+7*/+2
UK long-term holiday/short break confidence (Jan 2021 onwards confident)	86%	81%	-5*
Proportion going on a UK short break *or* holiday between June-Sept	41%	42%	+1
Split between holiday / short break / don't know for next trip between June-Sept	38%/57%/5%	39%/57%/4%	+1/0/-1

Week 3: Scorecard of Key Metrics (2) – England Intenders

Table 3. Top line Metrics – Specific short break and holiday plans

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

Key Metrics	Week 2	Week 3	Weekly Shift
Leading England destination likely to stay in between June - Sept	South West	South West	No change
Main *type* of destination likely to stay in between June - Sept	Traditional coastal/seaside town	Traditional coastal/seaside town	No change
Main accommodation type likely to stay in between June - Sept	Hotel/motel/inn	Caravan/camping	No significant change

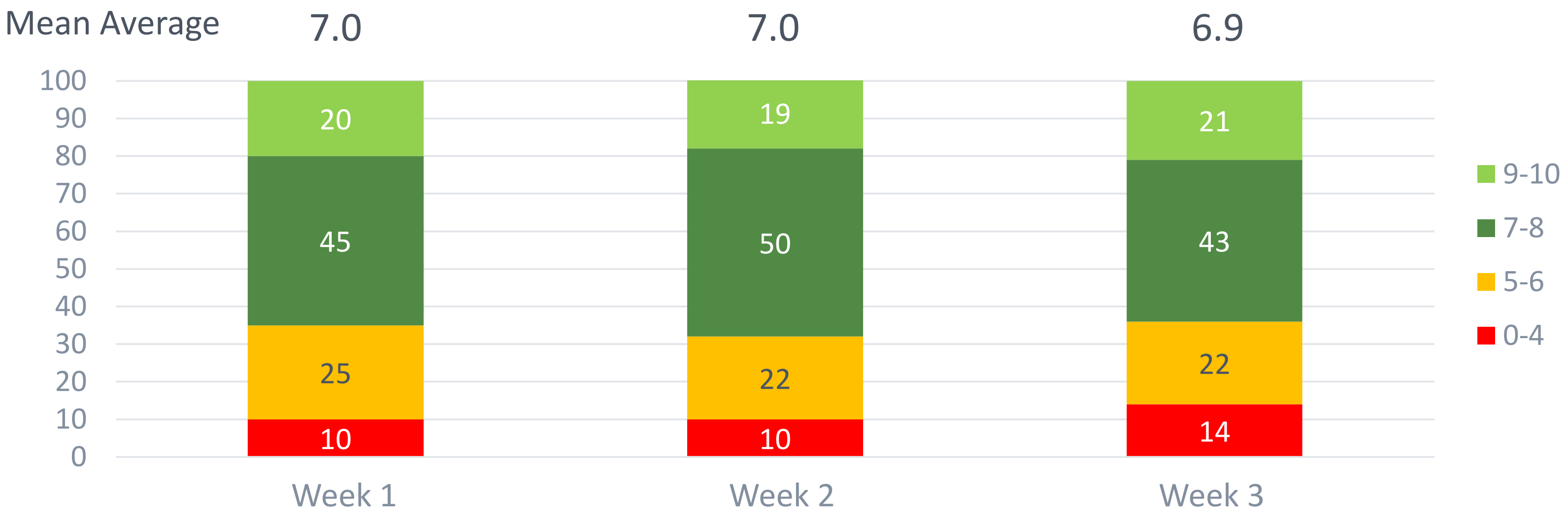
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 2	Week 3	Weekly Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

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

- Consistent with findings from weeks 1 and 2, 21% of England intenders describe their mood as 9 or 10 out of 10.
- However, the proportion rating their mood as 0-4 out of 10 is at 14%, significantly higher than in weeks 1 and 2.
- The average mood of England intenders is 6.9 out of 10, relatively consistent with previous weeks.

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

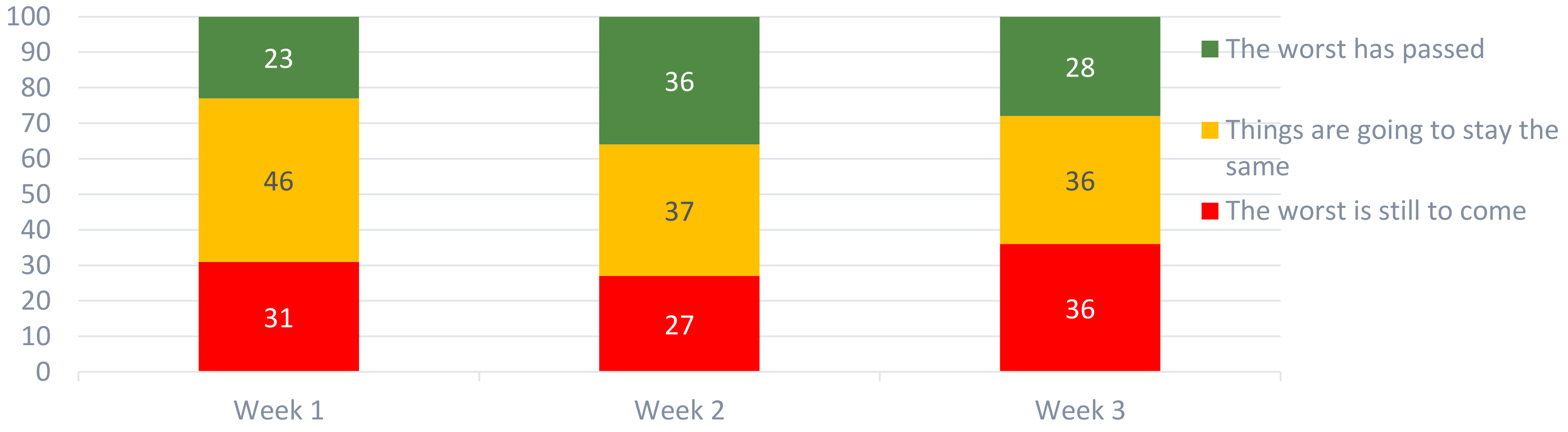


Q5: How would you rate, between 0 and 10, your mood today? Base: Exclusive England Intenders. Week 1 n=538; Week 2 n=562; Week 3 n=613

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

- The majority (72%) of England intenders feel that things are going to stay the same or the worst is still to come, significantly more than reported in week 2 (64%).
- 36% of England intenders feel that the worst is still to come, a significant rise on the 27% that stated this in week 2.

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; Week 3 n=613

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

- 36% of England intenders believe that life will return to 'something close to normal' by September, rising to 59% by the end of the year. Both figures have decreased marginally since week 2.

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

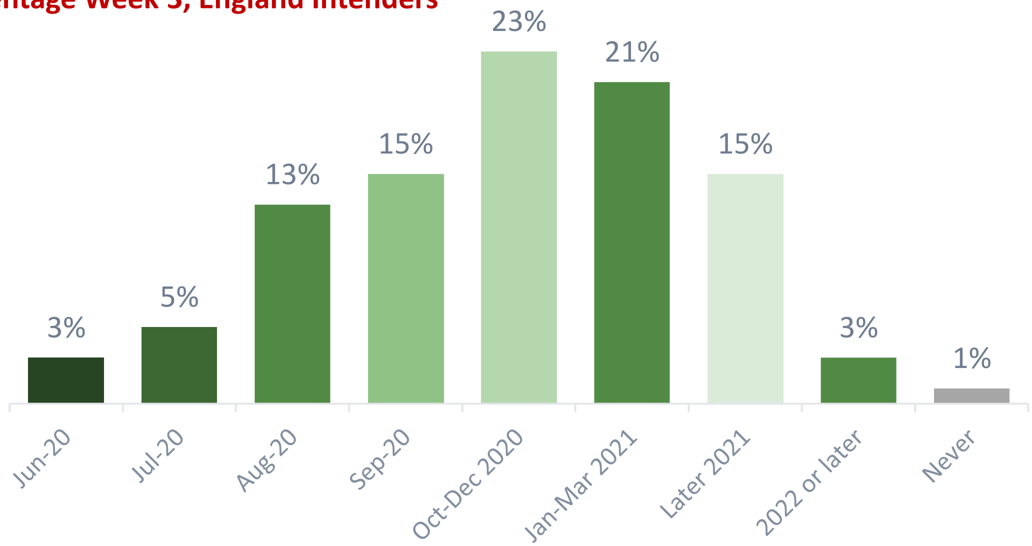


Figure 4. Proportion expecting normality <u>by September</u>, Percentage week-on-week, England Intenders

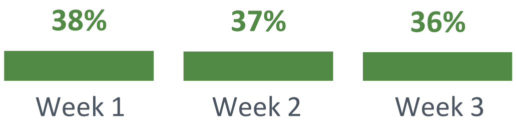
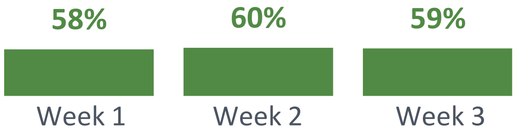


Figure 5. Proportion expecting normality <u>by December</u>, Percentage week-on-week, England Intenders

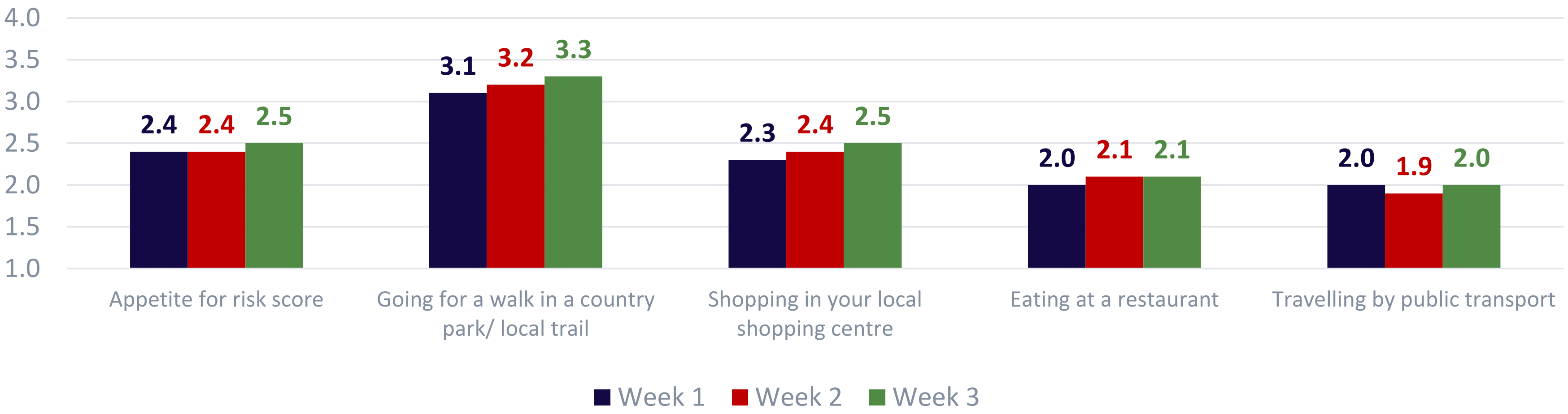


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: Exclusive England Intenders. Week 1 n=538; Week 2 n=562; Week 3 n=613

Level of comfort undertaking ‘everyday’ activities with a ‘comfort average’

- The ‘appetite for risk’ score stands at 2.4 out of 4 (4 representing ‘very comfortable’)
- The marginal increase is driven by higher comfort in doing a range of activities including ‘going for a walk in a country park/local trail’ and ‘shopping in a local shopping centre’. Comfort with ‘travelling by public transport’ is the only activity that hasn’t risen since week 1

Figure 6. Level of comfort conducting a range of activities separately and combined, Average Score week-on-week where 1= not at all comfortable doing activity and 4= very comfortable doing activity, England Intenders



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: ‘Exclusive England Intenders‘ n varies depending on item: Week 1 range = 482–518; Week 2 range = 505–548; Week 3 range = 561-594. 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

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

- Of the England intenders that would ordinarily book a domestic trip in these time periods, 21% would feel confident that they would be able to do so in June, rising to 36% in July to August, 62% in September to October, and 71% in November to December. 81% 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 3, England Intenders

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: All week 3 ‘Exclusive England Intenders’ that would consider going on a holiday or short break in these periods: June n=423, July-August n=503, September-October n=548, November-December n=550, January 2021 onwards n=580

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

- ‘Restrictions on travel imposed by government’ and ‘fewer opportunities to eat/drink out’ are the leading reasons cited for lack of confidence in taking trips in the U.K. between June and August (51% stating these). Restrictions are also a factor from September onwards (40%) but is second to ‘concerns about catching COVID-19’ (45%)
- Fewer opportunities to eat/drink out is significantly less of a concern from September onwards.

Figure 8. Top 5 reasons for not being confident about travelling between June to August, Percentage Week 3, England Intenders

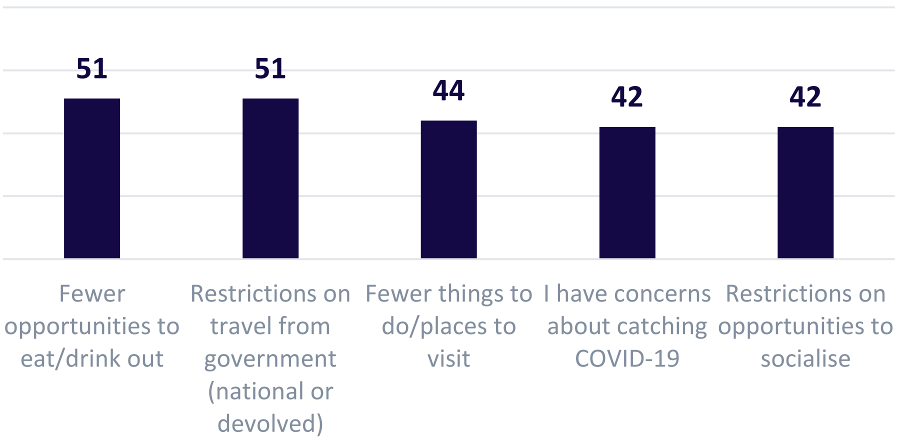
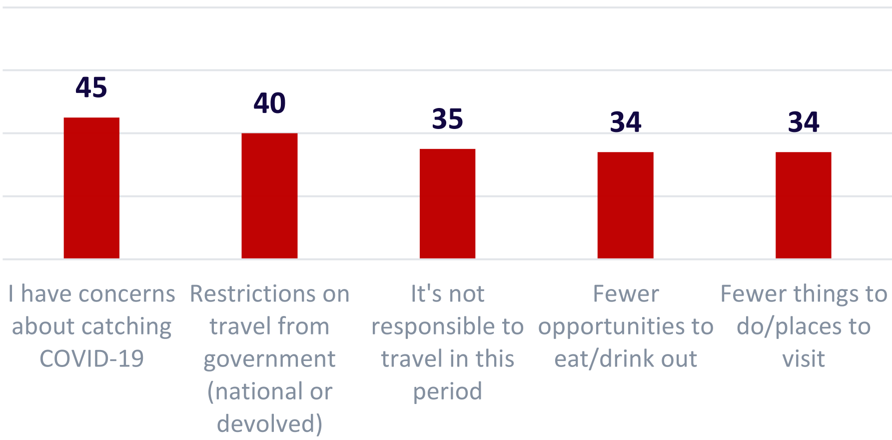


Figure 9. Top 5 reasons for not being confident about travelling from September onwards, Percentage Week 3, England Intenders



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=265 and from September onwards n=238

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

- Compared to normal, the public anticipates taking fewer short breaks (net -25) and holidays of 4+ nights (net -29) in the UK between now and the end of the year.

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

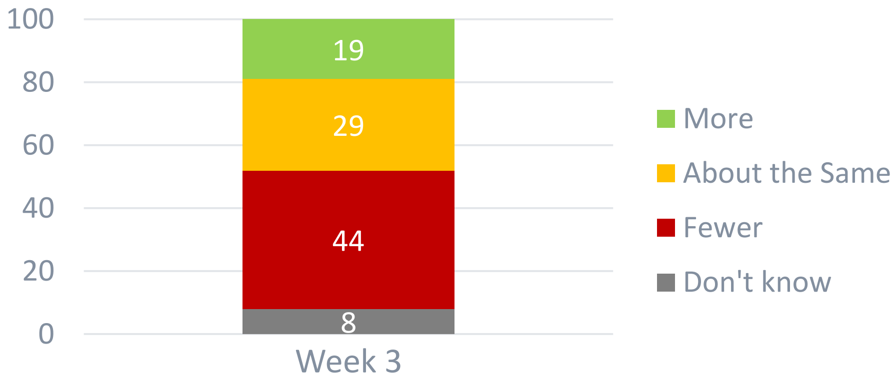
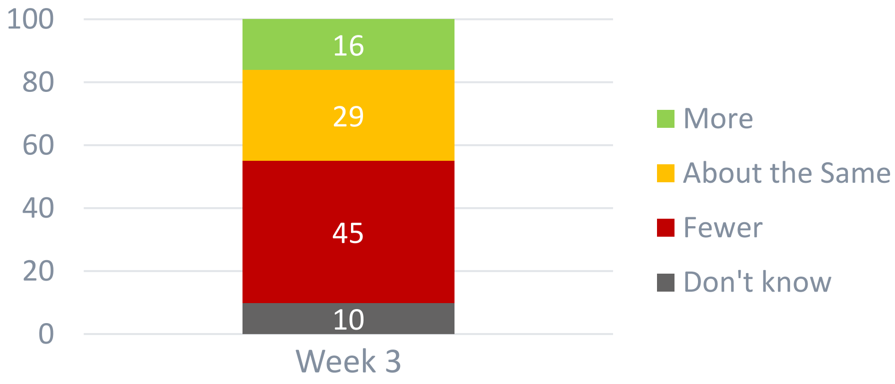


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 3, England Intenders



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 3 n=613

Anticipated number of OVERSEAS trips this year compared to normal

- England Intenders also anticipate taking fewer overseas short breaks (-47) 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 3, England Intenders

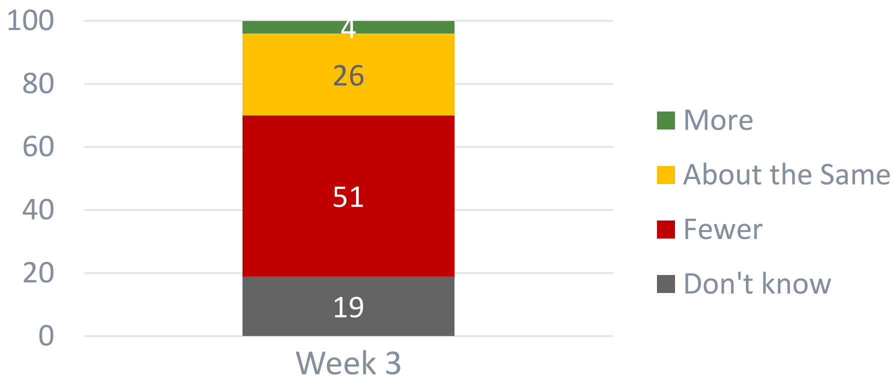
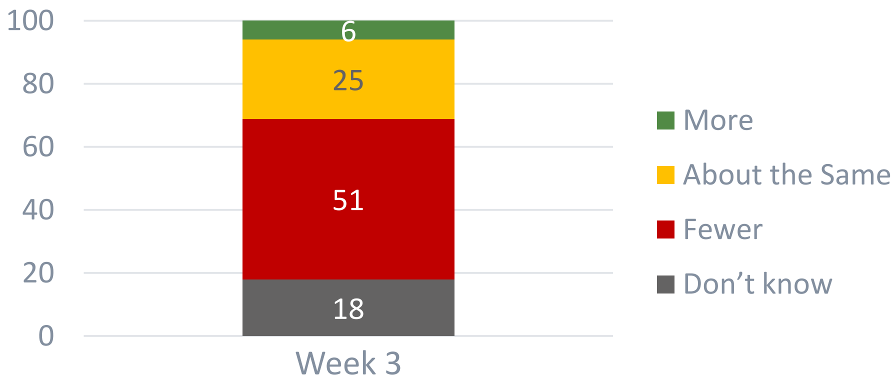


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 3, England Intenders



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 3 n=613

When anticipating to plan or book next England short break or holiday

- 71% of England intenders have either already planned or intend to plan a short break or holiday by September (for booking it's 63%)

Figure 14. When anticipate PLANNING next UK holiday or short break, Percentage Week 3, England Intenders

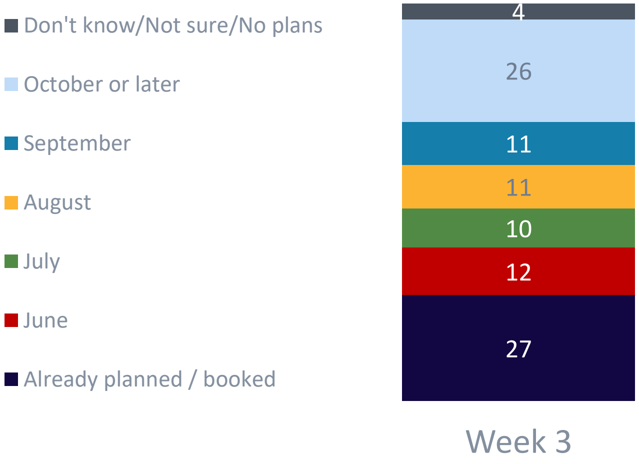
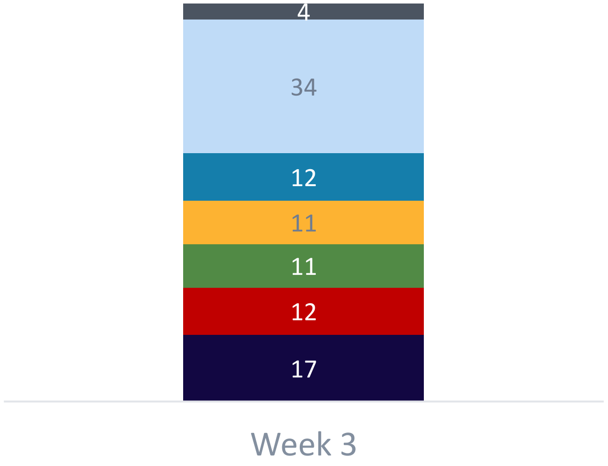


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 3, England Intenders



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 3 n=613

When anticipating to go on next England short break or holiday

- 42% of England intenders anticipate actually *going* on their next England short break or holiday by this September, marginally higher than the 41% stating this in week 2, and significantly higher than the 38% intending to do so in week 1.
- 57% plan on taking their next England trip in October or later.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 3, England Intenders

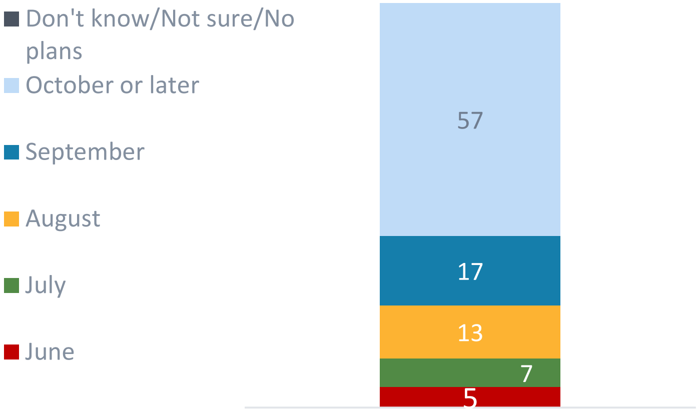
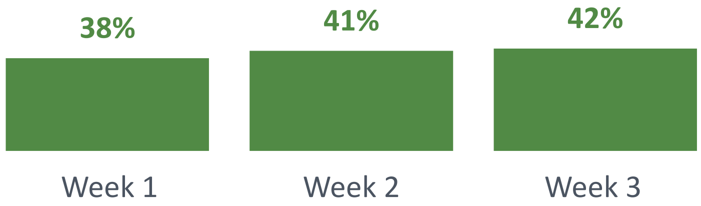


Figure 17. Proportion expecting to go on holiday by September, Percentage week-on-week, England Intenders

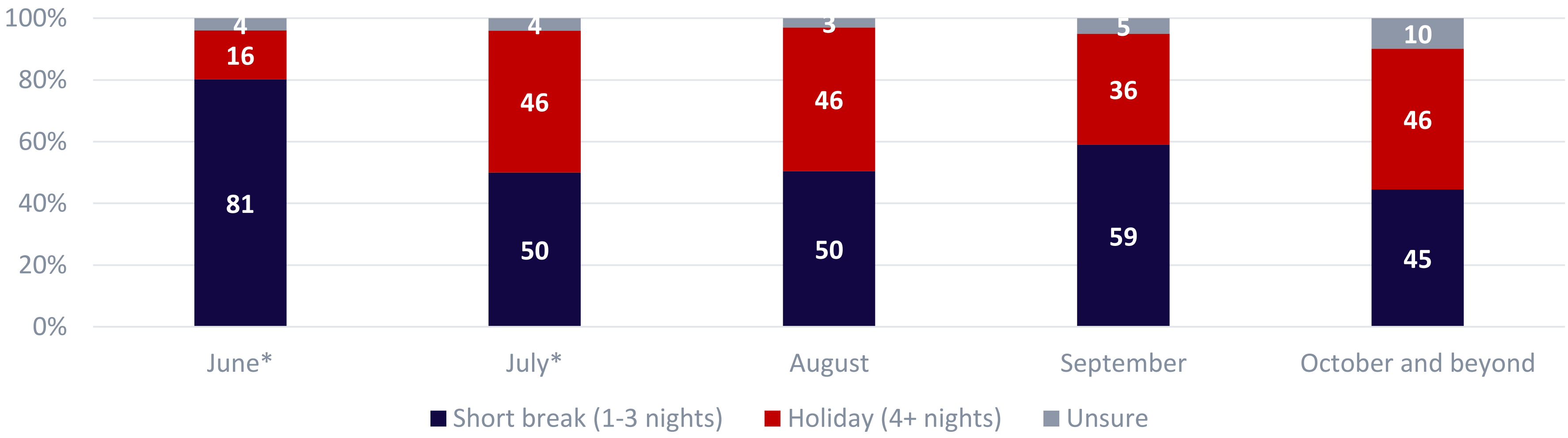


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: Exclusive England Intenders. Week 1 n=538; Week 2 n=562; Week 3 n=613

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

- Short breaks make up the majority of holiday types in June and September – the two summer months outside of the school holiday period. This is particularly the case in June, although base sizes are low. In July and August, there is a more even split.

Figure 18. Length of next holiday or short break by time period, Percentage Week 3, England Intenders



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 3 exclusive England respondents intending to take next holiday in each time period June n=29*, July n=47*, August n=86, September n=95, October and beyond n=356
*Indicates small base size. Please treat with caution.

Where planning on staying on next England short break or holiday

- The South West is the region of England most likely to attract U.K. short break and holiday visitors between June and September this year (27% intending to do so). The South West is followed by the North West (16%) and London (14%).
- From October onwards, there is more separation of preference. The South West of England, London and the North West are likely to attract the highest proportion of visitors.

Figure 19. Where planning on staying on next overnight trip in June to September, Percentage Weeks 1-3 merged data, England Intenders

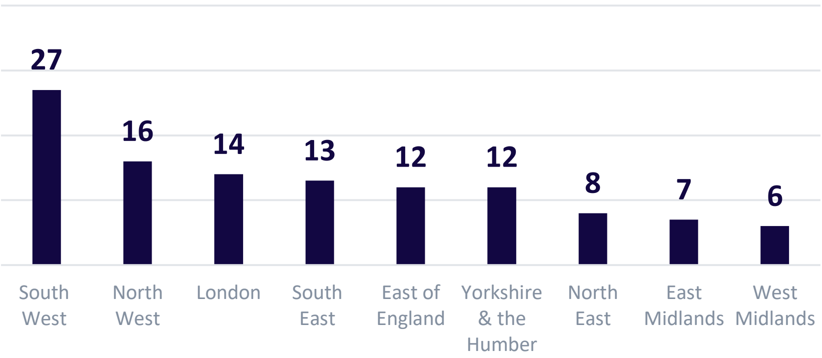
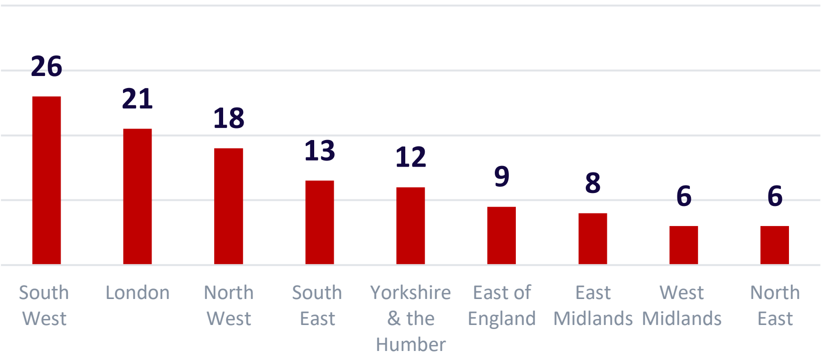


Figure 20. Where planning on staying on next overnight trip from October onwards, Percentage Weeks 1-3 merged data, England Intenders



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 1 to 3 respondents planning on taking a holiday or short break in England between June and September n=691 and from October onwards n=1,022
Three weeks of research merged to increase statistical reliability

Main mode of transport for next England short break or holiday

- Across both time periods, ‘own car’ is by far the predominant mode of transport. This is followed by ‘train’, while ‘plane’ leads the sub-10% modes of transport.
- Together, public transport (train and/or public bus/coach) is a likely mode of transport for 22% between June and September and 20% from October onwards

Figure 21. Top 5 main modes of travel to destination for trip in June to September, Percentage Week 3, England Intenders

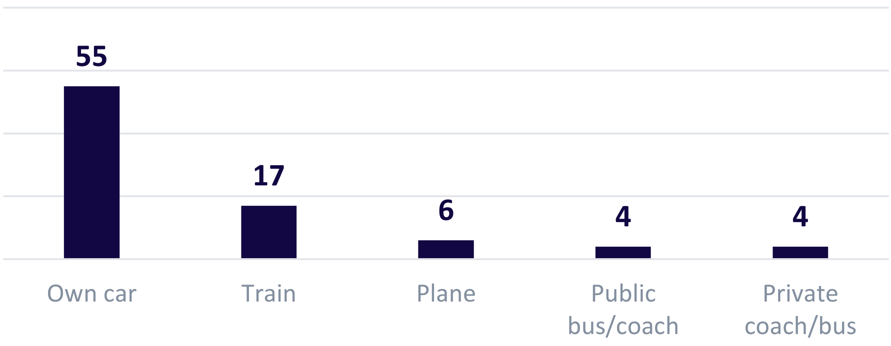
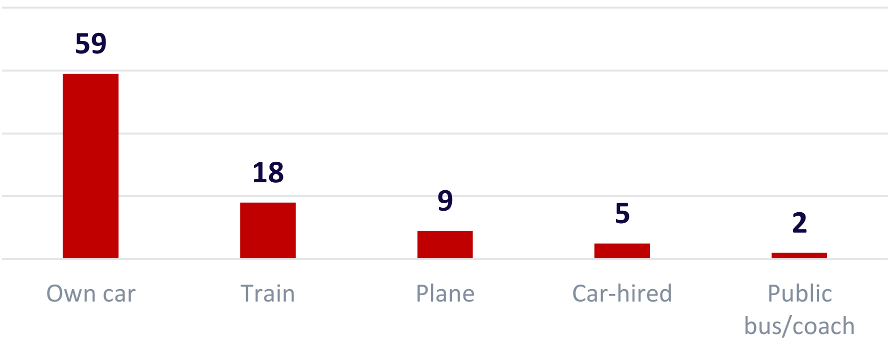


Figure 22. Top 5 main modes of travel to destination for trip from October onwards, Percentage Week 3, England Intenders



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=257 and from October onwards n=356

Type of destination for next England short break or holiday

- ‘Traditional coastal/seaside town’ (32%) and ‘countryside or village’ (32%) are the two main destination types for a trip between June and September. ‘City or large town’ (29%) and ‘rural coastline’ (22%) are the next most preferred destination types.
- From October onwards, ‘city or large town’ (35%) and ‘countryside or village’ (31%) are the top two preferred destination types.

Figure 23. Main type of destination for trip in <u>June to September</u>, Percentage Weeks 1-3 merged data, England Intenders

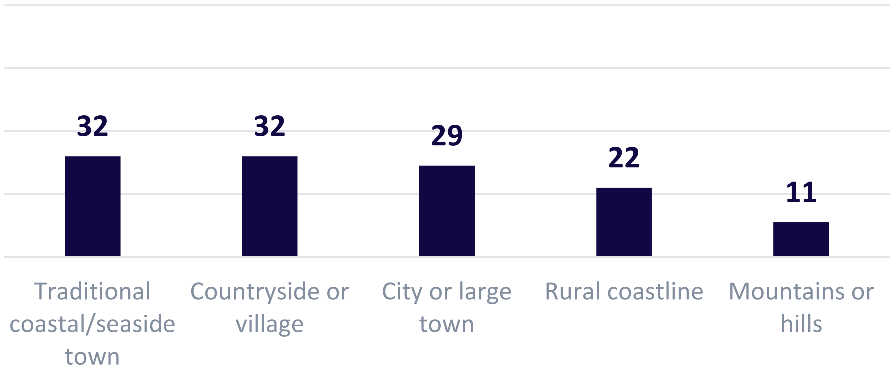
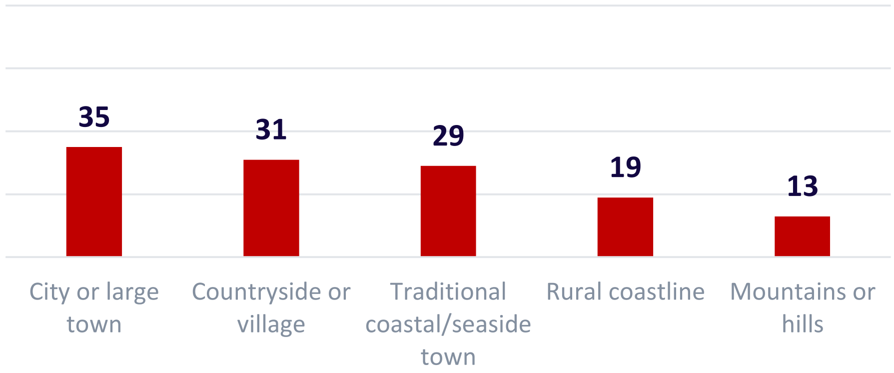


Figure 24. Main type of destination for trip from <u>October onwards</u>, Percentage Weeks 1-3 merged data, England Intenders



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All week 1 to 3 respondents planning on taking a holiday or short break in England between June and September n=691 and from October onwards n=1,022
Three weeks of research merged to increase statistical reliability

Type of accommodation for next England short break or holiday

- There is a relatively even split in the types of accommodation people are likely to use on their trips between June and September – ‘caravan/camping’ (36%), ‘private home’ (36%), ‘hotel/motel/inn’ (34%), and ‘commercial rental’ (33%) each generating interest from around a third.
- From October onwards, ‘hotel/motel/inn’ (46%) is significantly more likely to attract visitors than any other accommodation type.

Figure 25. Accommodation planning on staying in on next overnight trip in June to September, Net percentage Weeks 1-3 merged data, England Intenders

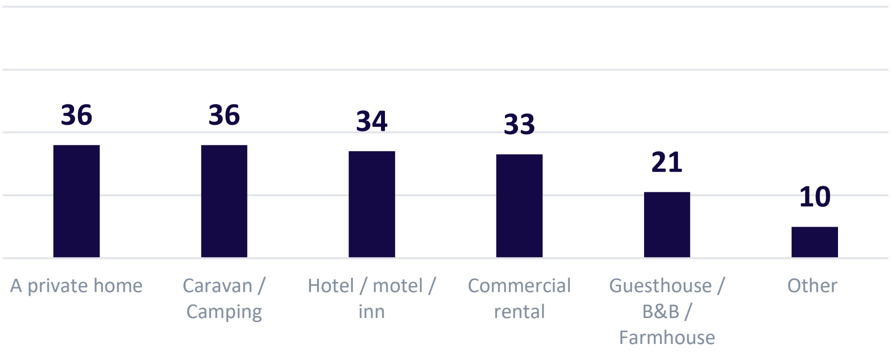
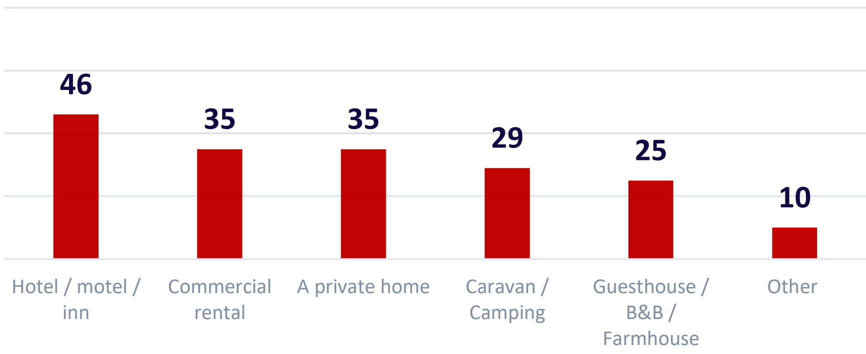


Figure 26. Accommodation planning on staying in on next overnight trip from October onwards, Net percentage Weeks 1-3 merged data, England Intenders

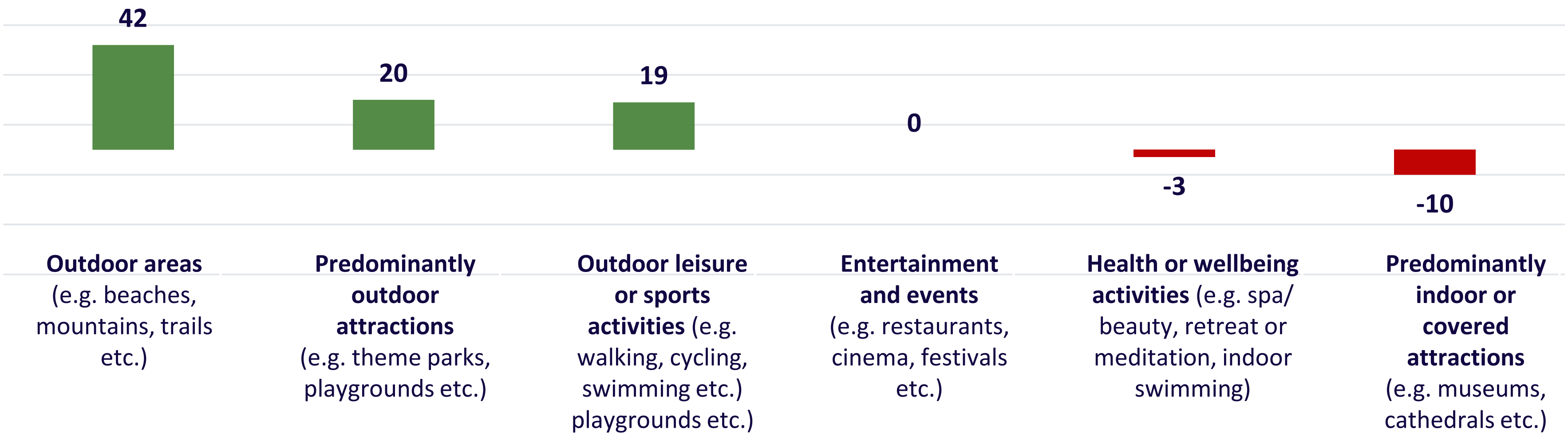


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 1 to 3 respondents planning on taking a holiday or short break in England between June and September n=691 and from October onwards n=1,022
Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal, followed by outdoor attractions and outdoor leisure or sports activities. Health or wellbeing facilities and indoor attractions are likely to attract fewer visitors/engagement than normal.
- Entertainment and events are no longer less likely to be attended than normal once restrictions are lifted.

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 3, England Intenders



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 3 n=613

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 3 of the COVID-19 consumer weekly tracker, with comparisons to Week 1 & 2 where appropriate. Week 3 fieldwork was conducted between 1st June and 5th June. 2020.
- The report focuses on 'England Intenders' – U.K. residents who claim their next overnight domestic short break or holiday will be in England.
  - The number of respondents in week 3 which qualified under this definition is 613.

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.