COVID-19 Consumer Weekly Tracker

Week 5
Fieldwork Period: 15-19 June
England Results
Introduction

- VisitEngland has commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight 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 to take their next domestic short break or holiday within the next year in England.
  - In week 5, 581 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](https://www.visitbritain.org/covid-19-consumer-sentiment-tracker)
# Fieldwork Periods

<table>
<thead>
<tr>
<th>Project Period</th>
<th>Fieldwork Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>18 – 22 May</td>
</tr>
<tr>
<td>Week 2</td>
<td>25 – 29 May</td>
</tr>
<tr>
<td>Week 3</td>
<td>1 – 5 June</td>
</tr>
<tr>
<td>Week 4</td>
<td>8 – 12 June</td>
</tr>
<tr>
<td>Week 5</td>
<td>15 – 19 June</td>
</tr>
<tr>
<td>Week 6</td>
<td>22 – 26 June</td>
</tr>
<tr>
<td>Week 7</td>
<td>29 June – 3 July</td>
</tr>
<tr>
<td>Week 8</td>
<td>6 – 10 July</td>
</tr>
<tr>
<td>Week 9</td>
<td>13 – 17 July</td>
</tr>
<tr>
<td>Week 10</td>
<td>20 – 24 July</td>
</tr>
<tr>
<td>Week 11</td>
<td>27 – 31 July</td>
</tr>
<tr>
<td>Week 12</td>
<td>3 – 7 August</td>
</tr>
<tr>
<td>Week 13</td>
<td>10 – 14 August</td>
</tr>
</tbody>
</table>
### Table 1. Top line Metrics – General Sentiment Scores

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Weekly Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>National mood (average score out of 10)</td>
<td>6.7</td>
<td>6.8</td>
<td>+0.1</td>
</tr>
<tr>
<td>Perceptions of the situation regarding Covid-19 (% stating ‘worst has passed’)</td>
<td>33%</td>
<td>35%</td>
<td>+2</td>
</tr>
<tr>
<td>Risk score: Comfort in undertaking a range of activities (1-4 comfort score)</td>
<td>2.4</td>
<td>2.5</td>
<td>+0.1</td>
</tr>
<tr>
<td>Normality score (proportion expecting normality by September)</td>
<td>25%</td>
<td>21%</td>
<td>-4</td>
</tr>
</tbody>
</table>

The main reason for not feeling confident about taking a trip between June-Sept

1. Fewer opportunities to eat/drink out

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

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Weekly Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated number of U.K. short breaks compared to normal (% net)</td>
<td>-29</td>
<td>-22</td>
<td>+7*</td>
</tr>
<tr>
<td>Anticipated number of U.K. holidays compared to normal (% net)</td>
<td>-31</td>
<td>-28</td>
<td>+3</td>
</tr>
<tr>
<td>UK near-term holiday/short break confidence (June/July/August confident)</td>
<td>7%/16%/34</td>
<td>8%/18%/36%</td>
<td>+1/+2/+2</td>
</tr>
<tr>
<td>UK medium-term holiday/short break confidence (Sept/Oct-Dec confident)</td>
<td>54%/72%</td>
<td>57%/71%</td>
<td>+3/-1</td>
</tr>
<tr>
<td>UK long-term holiday/short break confidence (Jan 2021 onwards confident)</td>
<td>88%</td>
<td>85%</td>
<td>-3</td>
</tr>
<tr>
<td>Proportion going on a UK short break or holiday between June-Sept</td>
<td>37%</td>
<td>35%</td>
<td>-2</td>
</tr>
<tr>
<td>Split between holiday / short break / don’t know for next trip between June-Sept</td>
<td>40%/54%/7%</td>
<td>38%/58%/3%</td>
<td>-2/+4/-4</td>
</tr>
</tbody>
</table>
### Week 5: Scorecard of Key Metrics (2) – England Intenders

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

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Weeks 2-4</th>
<th>Weeks 3-5</th>
<th>Weekly Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leading England destination likely to stay in between June - Sept</td>
<td>South West</td>
<td>South West</td>
<td>No change</td>
</tr>
<tr>
<td>Main type of destination likely to stay in between June - Sept</td>
<td>Countryside or village</td>
<td>Traditional coastal/seaside town</td>
<td>No significant change</td>
</tr>
<tr>
<td>Main accommodation type likely to stay in between June - Sept</td>
<td>A private home</td>
<td>A private home</td>
<td>No change</td>
</tr>
</tbody>
</table>

* Represents a significant change on previous week

#### Table 4. Top line Metrics – Broader leisure activity

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Weekly Shift</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 change</td>
</tr>
<tr>
<td>Place/activity generating lowest engagement compared to normal</td>
<td>Predominantly indoor or covered attractions</td>
<td>Predominantly indoor or covered attractions</td>
<td>No change</td>
</tr>
</tbody>
</table>
The national mood and perceptions of the situation in relation to COVID-19

- Consistent with week 4, 15% of England intenders describe their mood as 9 or 10 out of 10.
- The proportion rating their mood as 0-6 out of 10 is at 37%, lower than in week 4 (42%).
- The average mood of England intenders is 6.8 out of 10, increasing slightly on week 4.

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

<table>
<thead>
<tr>
<th>Average</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.0</td>
<td>20</td>
<td>19</td>
<td>21</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>7.0</td>
<td>45</td>
<td>50</td>
<td>43</td>
<td>43</td>
<td>48</td>
</tr>
<tr>
<td>6.9</td>
<td>25</td>
<td>22</td>
<td>22</td>
<td>29</td>
<td>27</td>
</tr>
<tr>
<td>6.7</td>
<td>10</td>
<td>10</td>
<td>14</td>
<td>13</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; Week 3 n=613; Week 4 n=593; Week 5 n=581
The national mood and perceptions of the situation in relation to COVID-19

- 71% of England intenders feel the worst has passed or things are going to stay the same, consistent with week 4 (72%).
- 30% of England intenders think the worst is still to come which is marginally higher than the 28% stating this in week 4.

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; Week 4 n=593; Week 5 n=581
Perceptions of when things will return to ‘close to normal’

- 21% of England intenders believe life will return to ‘something close to normal’ by September, lower than in previous weeks.
- At 48%, expectation of normality by the end of the year goes below 50% for the first time, significantly lower than in weeks 1-4.

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; Week 4 n=593; Week 5 n=581
NOTE: TIME PERIOD DIFFERENT TO PREVIOUS WEEKS

Figure 3. Perceptions of when things will return ‘close to normal’
Percentage Week 5, 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
Appetite for Risk

- The ‘appetite for risk’ score stands at 2.5 out of 4 (4 representing ‘very comfortable’), returning to the level achieved in week 3.

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

- 7% would feel confident they’d be able to take a U.K. short break or holiday in June this year, rising to 18% in July and 36% in August.
- In the months after August, over half of England Intenders would feel confident going on a domestic trip – 56% in September, 71% between October and December and 88% from January 2021 onwards.

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 5, England Intenders

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: Exclusive England Intenders. Week 5 n=581
Reasons for not feeling confident about taking trips in the U.K. – Top 5

- Amongst England intenders ‘fewer opportunities to eat/drink out’ remains the leading reason cited for lack of confidence in taking trips in the U.K. between June and September (49%), followed by ‘restrictions on travel from government’ (46%).
- ‘Concerns about catching COVID-19’ is the top concern from October onwards, significantly higher than any other with ‘fewer things to do/places to visit’ ranked second.

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

Figure 9. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 5, 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: Week 5 England intenders not confident about taking a break between June and September n=453 and from October onwards n=128.
Anticipated number of U.K. trips this year compared to normal

- Compared to normal, England intenders anticipate taking fewer U.K. short breaks (net -22) and holidays of 4+ nights (net -28) between now and the end of 2020.

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 5 n=581
Anticipated number of OVERSEAS trips this year compared to normal

- England Intenders also anticipate taking fewer overseas short breaks (-42) and holidays (-39) by the end of the year compared to normal although these numbers have increased from week 4.

Figure 12. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage
Week 5, England Intenders

Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage
Week 5, 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 5 n=581
When anticipating to plan or book next England short break or holiday

- 65% of England intenders have either already planned or intend to plan a short break or holiday by September, significantly lower than in week 4 (71%). For booking it’s 55%.

Figure 14. When anticipate **PLANNING** next UK holiday or short break, Percentage Week 5, England Intenders

- Don't know/Not sure/No plans
- January 2021 onwards
- October - December
- September
- August
- June/July
- Already planned / booked

Figure 15. When anticipate **BOOKING** next UK holiday or short break, Percentage Week 5, 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 5 n=581 NOTE: TIME PERIOD DIFFERENT TO PREVIOUS WEEKS
When anticipating to go on next England short break or holiday

- 35% of England intenders anticipate going on their next England short break or holiday by this September, slightly lower than in week 4, and significantly lower than in week 3.
- 37% do not intend on taking their next England trip until 2021.

Figure 16. When anticipate GOING on next UK trip, Percentage Week 5, England Intenders

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Figure 17. Proportion expecting to go on a short break/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; Week 4 n=593; Week 5 n=581
When planning on taking next England holiday or short break, by trip length

- More short breaks are anticipated than holidays for the rest of the year. This flips around in 2021 as people are looking to take more holidays.

Figure 18. Length of next holiday or short break by time period, Percentage Week 5, England Intenders

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All week 5 exclusive England respondents intending to take next holiday in each time period

July n=41*, August n=82, September n=81, October - December n=159, January 2021 onwards n=213

*Indicates small base size. Please treat with caution.
Where planning on staying on next England short break or holiday

- The South West is most likely to attract England intenders between June and September this year (29% intending to visit). This is followed by the North West (14%) and Yorkshire & the Humber (13%).
- From October onwards, there is a clearer hierarchy of preference and London jumps significantly. The South West, 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 3-5 merged data, England Intenders

Figure 20. Where planning on staying on next overnight trip from October onwards, Percentage Weeks 3-5 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 3-5 respondents planning on taking a holiday or short break in England between June and September n=651 and from October onwards n=1,004
Three weeks of research merged to increase statistical reliability
Main mode of transport for next England short break or holiday

- ‘Own car’ is the predominant mode of transport for trips in both time periods. This is followed by ‘train’, while ‘plane’ leads the sub-10% modes of transport.
- Public transport (train and/or public bus/coach) as a mode of transport between June and September (19%) rises significantly from week 4 (12%).

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

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

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 5 respondents planning on taking a holiday or short break in England between June and September n=209 and from October onwards n=372
Type of destination for next England short break or holiday

• ‘Traditional coastal/seaside town’ (34%) is the main destination type for a trip between June and September. ‘Countryside or village’ follows close behind (33%) followed by ‘city or large town’ (26%) which is significantly less preferred in 3rd position.

• From October onwards, ‘city or large town’ (33%) narrowly leads ‘countryside or village’ (32%) and ‘traditional coastal/seaside town’ (30%) as the most preferred destination type.

Figure 23. Main type of destination for trip in June to September, Percentage Weeks 3-5 merged data, England Intenders

Figure 24. Main type of destination for trip from October onwards, Percentage Weeks 3-5 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 3-5 respondents planning on taking a holiday or short break in England between June and September n=651 and from October onwards n=1,004
Three weeks of research merged to increase statistical reliability
The even split in the top leading types of accommodation between June and September remains with ‘private home’ (36%), ‘caravan/camping’ (35%), ‘hotel/motel/inn’ (33%), and ‘commercial rental’ (31%) each generating broadly similar interest.

From October onwards, ‘hotel/motel/inn’ (40%) is 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 3-5 merged data, England Intenders

Figure 26. Accommodation planning on staying in on next overnight trip from October onwards, Net percentage Weeks 3-5 merged data, England Intenders
General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal when lockdown restrictions are lifted, followed by outdoor attractions and outdoor leisure or sports activities. This remains consistent week on week.
- ‘Predominantly indoor attractions’ are most likely to face declines in visitors/engagement when compared to normal.

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 5, England Intenders

<table>
<thead>
<tr>
<th>Outdoor areas (e.g. beaches, mountains, trails etc.)</th>
<th>Predominantly outdoor attractions (e.g. theme parks, playgrounds etc.)</th>
<th>Outdoor leisure or sports activities (e.g. walking, cycling, swimming etc.)</th>
<th>Entertainment and events (e.g. restaurants, cinema, festivals etc.)</th>
<th>Health or wellbeing activities (e.g. spa/beauty, retreat or meditation, indoor swimming)</th>
<th>Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
<td>22</td>
<td>20</td>
<td>-7</td>
<td>-8</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 5 n=581
Conditions needed for people staying in accommodation post-lockdown

- Steps to improve cleanliness (86%) and manage people (79%) are seen as the most essential conditions for accommodation providers to meet for stayers this summer. Booking control (77%) and health measures (68%) are also both important.

Figure 28. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 5, England Intenders

- Net: Reduced contamination 81%
- Net: Social distancing measures 79%
- Net: Booking incentives 77%
- Net: Guest/Staff interventions 68%
- Net: Cleanliness standard 42%

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 this summer? Base: Exclusive England Intenders. Week 5 n=581 NOTE: NEW QUESTION AT WEEK 5
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 5 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-4 where appropriate. Week 5 fieldwork was conducted between 15th June and 19th 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 5 which qualified under this definition is 581.
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.