Insight Department:
UK Segments during the Covid 19 pandemic

Topic paper
October 2020

Overview

UK Segments during the Covid 19 pandemic

During the pandemic, it has become clear that the factors that previously identified key segments for Scottish tourism are being affected by the current Covid-19 situation (see previous UK segmentation in this link visitscotland.org/research-insights/about-our-visitors/uk)

There are 2 main ways in which this is happening. Government restrictions alongside consumer attitude to (Covid) risk are now the predominant factors affecting travel alongside the financial impact of the Covid-19 pandemic on the economy and people's lives.

As part of the joint UK Consumer Sentiment Tracking (VisitScotland, VisitEngland and Visit Wales). (visitscotland.org/research-insights/coronavirus-insights/uk-market#tracker), some new segments have been developed by the BVA-BDRC group to help the tourism industry to understand consumer attitudes and behaviour towards travel and leisure during the current crisis.

	Segment	Percentage of Population	Likelihood to take UK domestic breaks
	Life Goes On	33%	Strong likelihood
	Pragmatic Policy Supporters	20%	Medium likelihood
	Covid Cautious	32%	Medium likelihood
	Covid Impacted*	8%	Low likelihood
	Anxious Appreciator Hermits*	7%	Low likelihood

*Please note that for analysis purposes in the regular UK Consumer Sentiment Tracking reports (link above), the last 2 segments (Covid Impacted and Anxious Appreciator Hermits) have been amalgamated into one segment due to lower sample sizes of these groups and named the 'Covid Concerned'. They are the least likely segment to be considering domestic travel and holidays during the pandemic.

This segmentation is primarily an attitudinal one based on different statements measured as the pandemic has progressed. The 4 main differentiating attitudinal factors are outlined for each segment below (each based on several attitudinal questions).

Enjoyment of lockdown:	People who believe that lockdown has been good for them and do not really want a return to 'normality'.
Health Risk Prioritisation	People who state that they are behaving extra cautiously as they do not want to catch Covid-19 or risk passing it on to someone else. These people may believe restrictions were lifted too early and preventing a second wave is the most important aspect.
Support of Government Policy	People who are more likely to agree that government restrictions were necessary as people cannot always be trusted to do the right thing. They also believe that the initial lifting of restrictions on shopping, holidays and going out was the right thing to do, even if the threat of Covid-19 hadn't yet been removed.
Personal Freedom prioritisation	People who value their personal freedom. The willingness to risk catching Covid-19 if it enables more enjoyment of life. They believe life is too short to worry about Covid-19 as it's one of many dangerous things in the world.

*note that where there is no shading in the attitude descriptions below, it means the segment in question indexes very low on that factor.

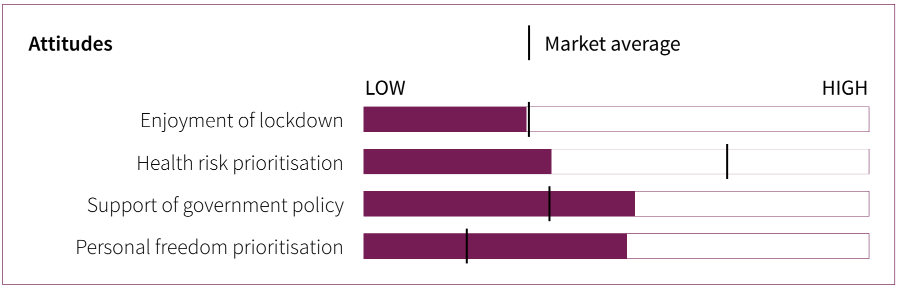
A description of the segments are outlined below:-

Life Goes On
(33% of UK population):

Aching for normality to be restored, this segment is not worried about the risks associated with COVID-19 and are supportive of trying to maintain as normal a life as possible in order to protect the economy and get back to living their lives. 'Opportunities to eat/drink out' and 'fewer things to do' were their main barriers to taking a U.K. trip.

This segment are younger pre-nesters and families and more likely to be professionals, falling into A or B social grades.

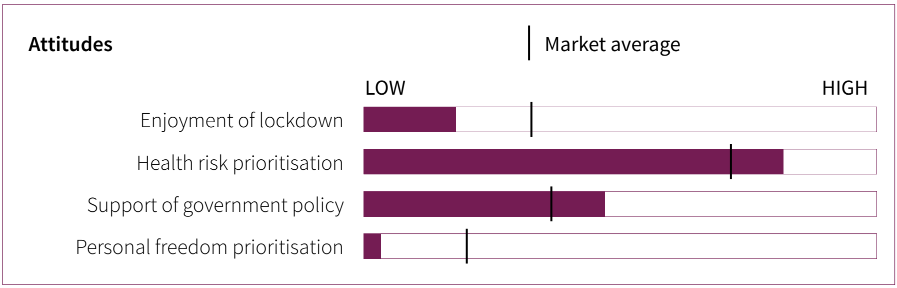
The 'Life Goes On' segment are significantly more likely to book accommodation and to take holidays (46%) within the UK (and the only segment to consider going abroad (31%) prior to the majority of quarantine restrictions coming into force).



Pragmatic Policy Supporters
(20% of UK population):

Concerned about the impact of COVID-19, but trusting and supportive of the authorities' policies and most believed the worst was behind us. Most likely to cite 'concerns about catching COVID-19' as a barrier to taking domestic trips. Restrictions on travel also a factor.

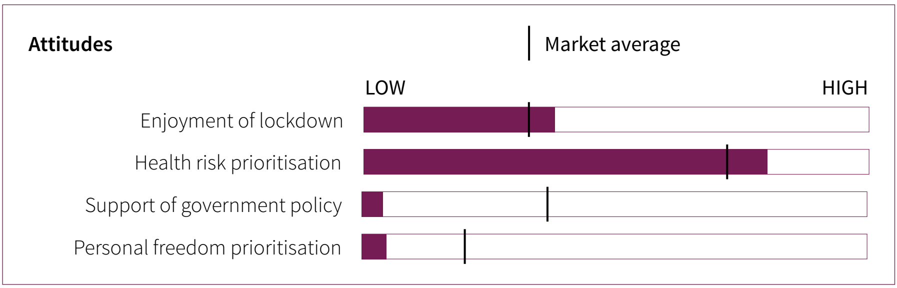
This segment has a male bias and almost a third are over 65 (31%) with almost a quarter in socio demographic group AB. A high proportion are also empty nesters (30%). This is the second most likely group after 'Life Goes on' to consider taking a domestic holiday (38%).



COVID Cautious
(32% of UK population):

While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst. They are likely to be cautious in their own behaviour as they continue to monitor the situation. They index highly on ‘’it’s not responsible to travel’ and ‘restrictions on travel’.

This segment is more likely to have a spread of ages with more than half being in the C1-C2 socio economic grouping. More than 2/5ths are likely to be in the older independent lifestage (aged 35-64 with no children in household). 38% of this segment claim to have been financially impacted because of the crisis.

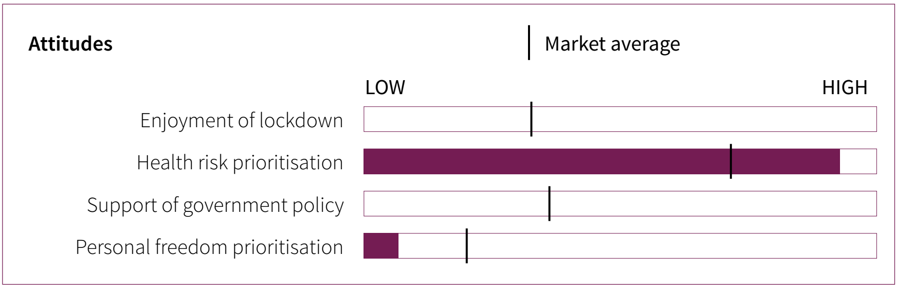


A description of the segments are outlined below:-

COVID Impacted
(8% of UK population):

This segment is suffering financially and is also concerned about the ongoing health implications of the virus and the potential impact of restrictions. They give the lowest mood ratings of all the segments. ‘Concerns about catching COVID-19’ is the biggest barrier to taking a UK break, and are the segment most likely to cite ‘personal finances’ as a barrier.

COVID Impacted is also the oldest segment, with two fifths being 65+ years old and has the highest proportion of D & E socio- economic groupings. This segment is significantly more likely to have been impacted financially by the Covid crisis (54%).

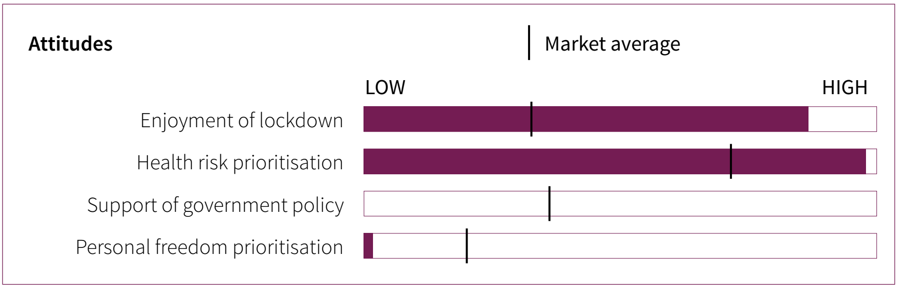


Anxious Appreciator Hermits:
(7% of UK population):

Anxious about the virus, the handling of the situation and society's behaviour, but have valued the time at home. As such, they are likely to take longer to resume 'normal' behaviour. 'Concerns about catching the virus' and 'It's not responsible to travel' are the biggest barriers to taking a U.K. holiday or short break.

This segment has a stronger female bias and a higher incidence of D and E socio economic status.

Anxious Appreciator Hermits are the least likely to take a domestic holiday during 2020 (and possibly during 2021) and a holiday abroad is out of the question in the minds of this segment.



FINAL THOUGHTS

As the situation during the pandemic develops it is likely that there will be fluidity within these segments given the rapidly changing situation. Figures on holidays taken in Scotland during 2020 and future holiday intentions by each segment will be outlined in the Scotland reports in the UK Consumer Sentiment tracker which can be found here (visitscotland.org/research-insights/coronavirus-insights/uk-market#tracker). This insight will be used by VisitScotland to inform our activities as well as keeping tourism industry groups informed during the pandemic. UK Covid Segments reproduced with permission from BVA-BDRC www.bva-bdrc.com

Appendices: Segment demographics (as at July 2020)

Segment Demographics

- The **COVID impacted** and **Anxious Appreciator Hermits** segments both have a female bias, a higher incidence of lower (D and E) social grades and more likely to have suffered financially as a result of lockdown (differences statistically significant for COVID impacted), So financial pressures as well as concerns about COVID will affect the future behaviour of these groups. **COVID impacted** is also the oldest segment with two fifths being 65+ years old
- In contrast **Life Goes On** are younger pre-nesters and families and more likely to be professionals falling into A or B social grades.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (8%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (33%)
	Gender	60% (female)	63% (Female)	54% (Female)	53% (Male)	54% (Male)
Age	Under 35 years	33%	29%	24%	24%	42%
	35-64 years	47%	32%	54%	46%	45%
	65+ years	20%	40%	22%	31%	13%
Social grade	A or B	21%	15%	17%	24%	28%
	C1 or C2	49%	44%	56%	49%	53%
	E or D	30%	41%	26%	26%	19%
Life stage	Pre Nesters (16-65+ and no children)	23%	19%	16%	15%	23%
	Families (16-65+ with children)	23%	16%	22%	29%	40%
	Older Independent (36-64 and no children)	34%	26%	41%	26%	25%
	Empty Nesters (65+ and no children)	20%	39%	21%	30%	12%
	Financially Hit	47%	54%	38%	38%	33%

Difference compared to general population | Significantly higher | Significantly lower

Segment future behaviours 1/

- Although the likeihood of visiting / engaging in different leisure activities follows a consistent order across segments (related to the government's phased opening), there are significant differences in the proportions of each segment likely to engage in these activites by Dec 2020.
- As we would expect the **Life Goes On** segment is the most likely to re-engage in all leisure activites this year, folowed by Pragmatic Policy Supports; but there are opportunites for park / garden attractions, shops and restaurants to attract customers across all segments

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (8%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (33%)
Visitor attractions	Outdoor park	55%	50%	63%	63%	70%
	Go on a day out	27%	29%	37%	43%	59%
	Museum / gallery	20%	13%	20%	27%	40%
Leisure activities	Go shopping	43%	59%	59%	65%	75%
	Go to a restaurant	44%	50%	48%	57%	70%
	Go to the cinema	29%	21%	25%	35%	50%
	Go to the gm	16%	15%	15%	20%	38%

Difference compared to general population   Significantly higher   Significantly lower

Segment future behaviours 2/

- The **Life Goes On** segment are significantly more likely to use all forms of transport and to take holidays both in the UK and abroad making them an obvious target for transport, travel and accommodation business.
- No segments have completly closed off to the idea of using public transport or taking UK holidays this year. **Anxious Appreciator Hermits** are the least likely, but even so a third expect to take the bus(35%) and a quarter to take the train (26%) and go on a domestic holdiay (25%), However overseas holiday aren't on the cards this year for most segments (with the posible exception on **Life Goes On**, 31% of whom to do so before the end of 2020.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (8%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (33%)
Transport	Taking the bus	35%	37%	32%	35%	51%
	Taking the train	26%	31%	39%	35%	51%
	Booking a flight	6%	14%	14%	19%	38%
Going on holiday	In the UK	25%	29%	34%	38%	46%
	Overseas	8%	6%	10%	12%	31%
	Book accommodation	15%	22%	23%	26%	48%

Difference compared to general population | Significantly higher | Significantly lower

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