COVID-19 Consumer Weekly Tracker

Week 2

Fieldwork Period: 25-29 May 2020

U.K. Results

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 weekly U.K. nationally representative sample of 1,750 adults aged 16+. The survey is repeated across a 13 week period with the first wave published on 1 June 2020.
- 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)

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

		Week 1	Week 2	W-o-W Change
General sentiment scores	National mood (average score out of 10)	6.7	6.7	0.0
	Perceptions of the situation regarding Covid-19 (proportion stating 'worst has passed')	24%	29%	+5*
	Risk score: Confidence in undertaking a range of activities (1-4 confidence score)	2.2	2.3	+0.1
	Normality score (proportion expecting normality by September)	32%	30%	-2
	The main reasons for not feeling confident about taking a trip between June-August (Top 2)	1. Gov't guidance on travel restrictions 2. Concerns about catching COVID-19	1. Gov't guidance on travel restrictions 2. Concerns about catching COVID-19	No change
General short break & holiday intentions	Anticipated number of U.K. short breaks compared to normal (% more minus fewer)	-28	-27	-1
	Anticipated number of U.K. holidays compared to normal (% more minus fewer)	-31	-31	0
	UK near-term holiday/short break confidence (June /July-August very/fairly confident)	16%/25%	13%/25%	-3/0
	UK medium-term holiday/short break confidence (Sept to Oct/Nov-Dec very/fairly confident)	40%/52%	43%/54%	+3/+2
	UK long-term holiday/short break confidence (Jan 2021 onwards very/fairly confident)	70%	75%	+5*
	Proportion going on a UK short break *or* holiday between June and September	19%	22%	+3*
	Split between holiday / short break / don't know for next trip between June and September	46%/48%/6%	41%/52%/6%	-5/+4/0

Week 2: Scorecard of Key Metrics (2)

Table 1b. Top line Metrics

		Week 1	Week 2	W-o-W Change
Specific short break and holiday plans	Leading U.K. destination likely to stay in between June and September (Top 3)	1. South West 2. Scotland 3. South East	1. South West 2. North West 3. Scotland	No significant changes
	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. Caravan/camping 2. Commercial rental 3. A private home	1. Hotel/motel/inn 2. Private home 3. Caravan/camping	No significant changes
Broader leisure activity	Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No significant changes
	Place/activity generating lowest engagement compared to normal	Indoor health/wellbeing activities	Predominantly indoor or covered attractions	No significant changes

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

- Consistent with findings from week 1, 17% of U.K. adults describe their mood as 9 or 10 out of 10. Also consistent with week 1, they rate their mood as 6.7 out of 10 on average.

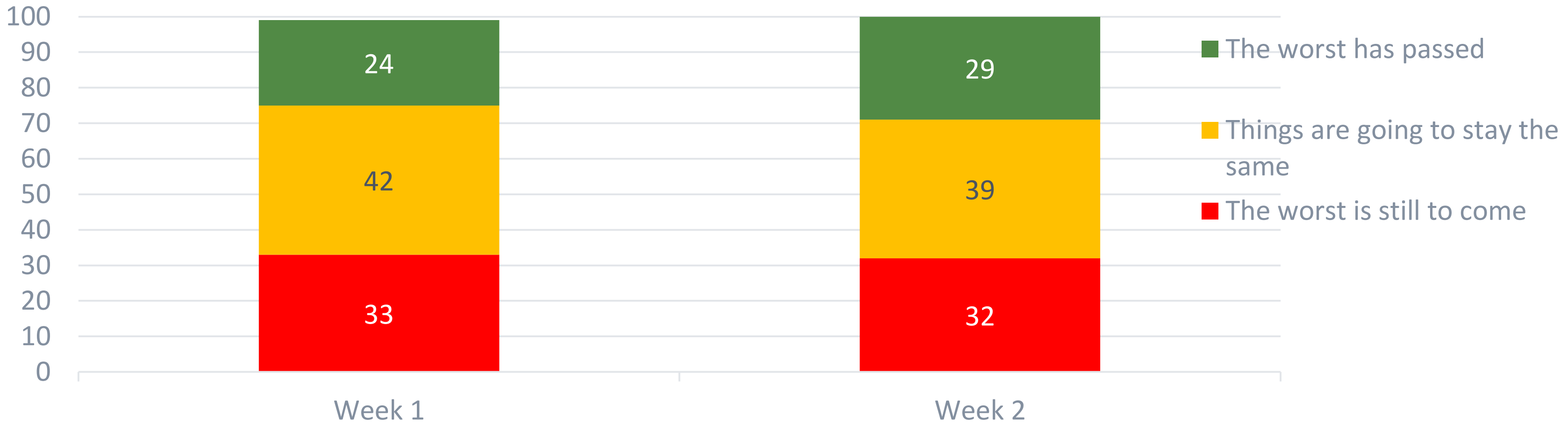
Figure 1. Current mood out of 10, Percentage week-on-week, UK

Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 1 n=1,753; Week 2 n=1,757

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

- 29% of respondents indicate they feel the worst has passed in relation to the COVID-19 situation, which is a statistically significantly higher proportion than the 24% who stated this in week 1.

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



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: All respondents. Week 1 n=1,753; Week 2 n=1,757

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

- Sentiment is largely unchanged week-on-week, with 30% believing that life will return to 'something close to normal' by September, rising to 53% by the end of the year.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 2, UK

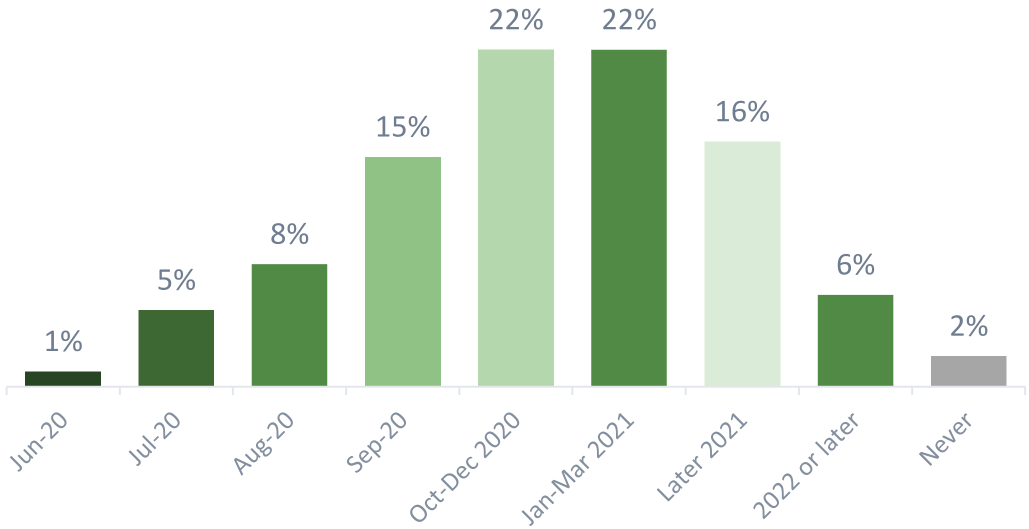


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

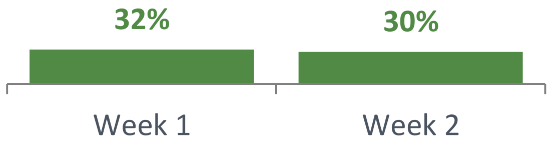
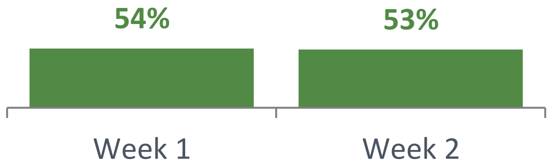


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

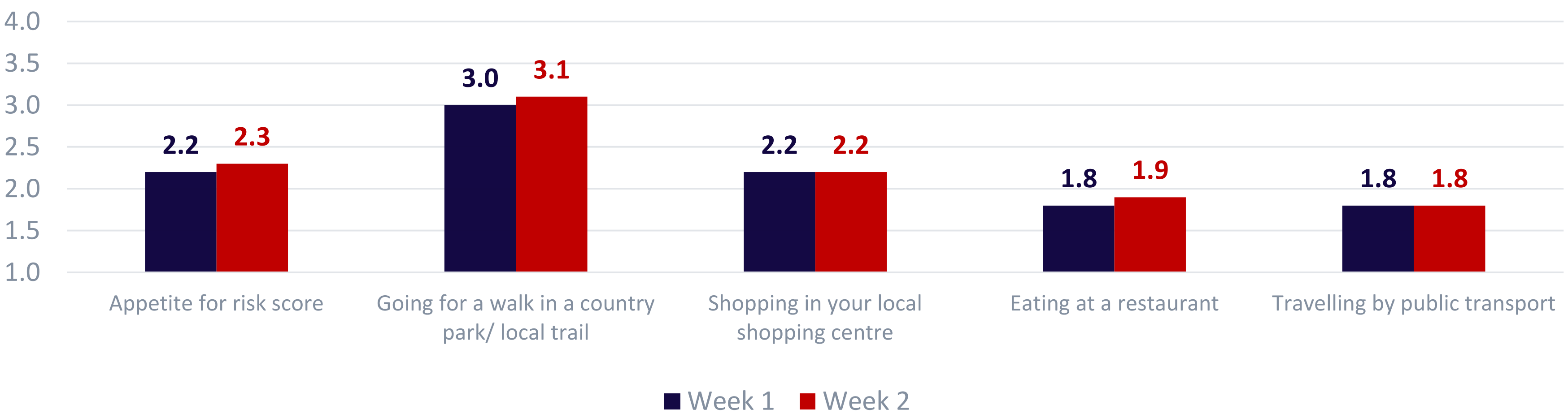


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757

Confidence in undertaking ‘everyday’ activities with a ‘confidence average’

- The ‘appetite for risk’ score stands at 2.3 out of 4 (4 representing ‘absolute confidence’), which is marginally higher than in week 1
- Confidence is again highest for walks in a country park/local trail (3.1), while people exhibit the lowest levels of confidence eating at a restaurant (1.9) and using public transport (1.8)

Figure 6. Confidence 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, UK



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents 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. Week 1 n=1,753; Week 2 n=1,757

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

- Of the U.K. adults that would ordinarily book a domestic trip in these time periods, 13% would feel confident that they would be able to do so in June, rising to 25% in July to August, 43% in September to October, and 54% in November to December. 75% 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, UK

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 2 respondents that would consider going on a holiday or short break in these periods: June n=957, July-August n=1,163, September-October n=1,333, November-December n=1,341, January 2021 onwards n=1,507

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 and August (50% stating this). It is also a factor from September onwards (44%) but is second to ‘concerns about catching COVID-19’ (55%)

Figure 8. Top 5 reasons for not being confident about travelling between June to August , Percentage Week 2, UK

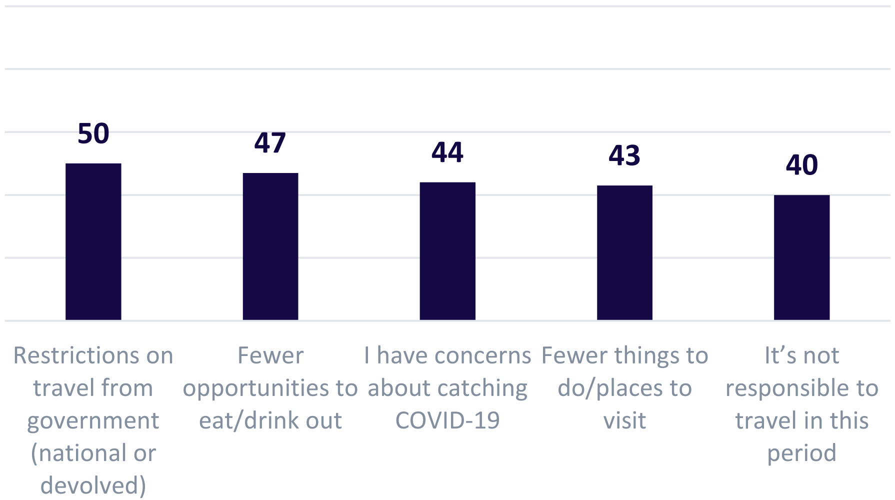
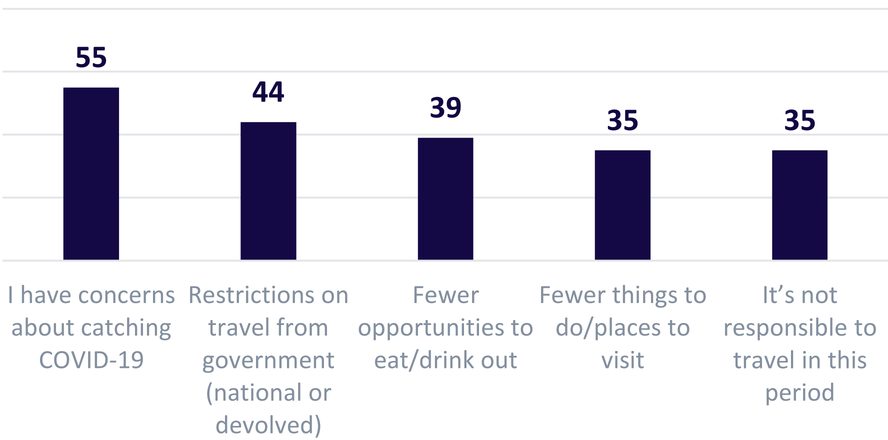


Figure 9. Top 5 reasons for not being confident about travelling from September onwards, Percentage Week 2, UK



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: Respondents not confident about taking a break between June and August n=551 and from September onwards n=819

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

- Compared to normal, the public anticipate taking fewer short breaks (net -27) and holidays of 4+ nights (net -31) 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, UK

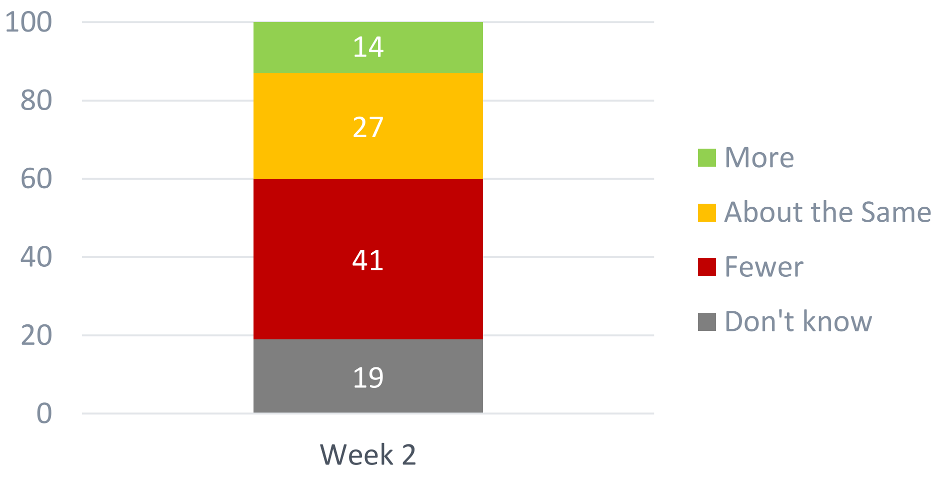
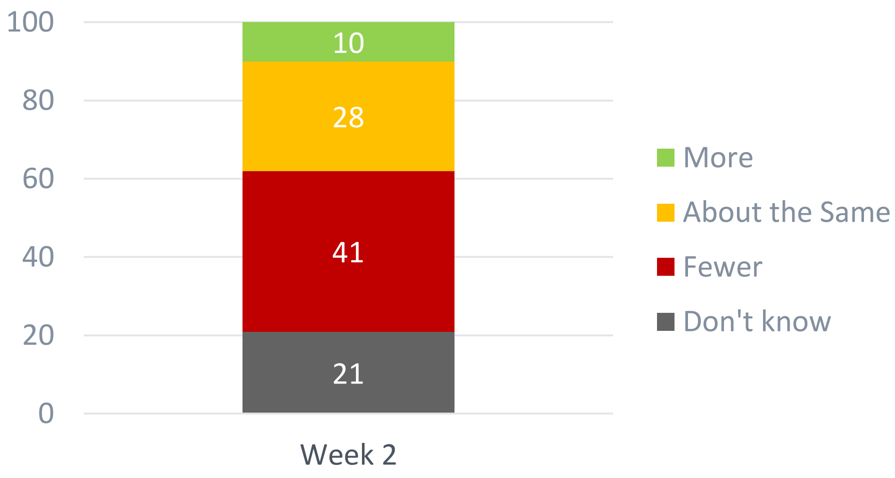


Figure 11. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 2, UK



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: All week 2 respondents n=1,757

Anticipated number of OVERSEAS trips this year compared to normal

- U.K. adults also anticipate taking fewer overseas short breaks (-41) and holidays (also -41) by the end of the year compared to normal. This net negative intention for overseas trips is significantly more pronounced than for domestic.

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

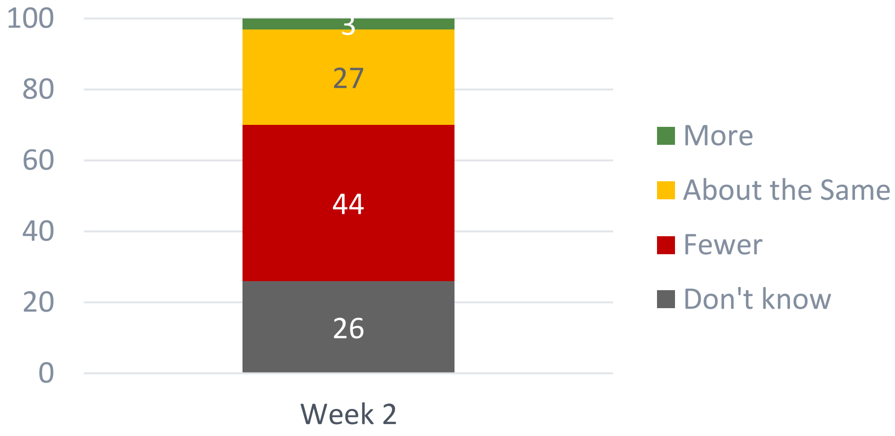
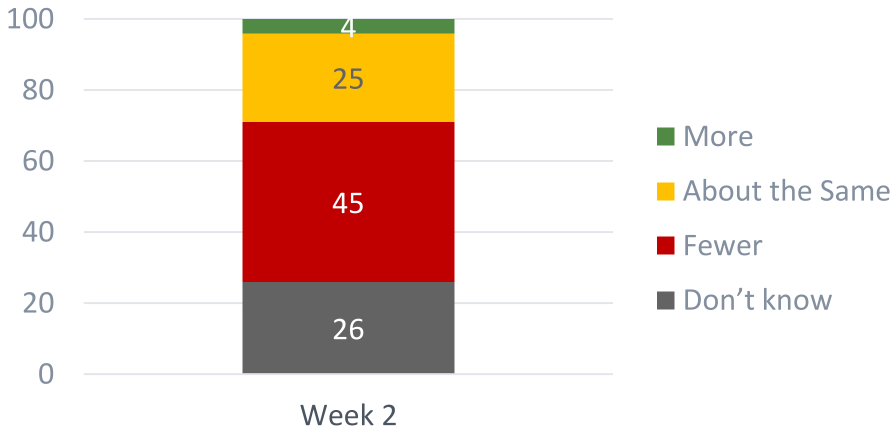


Figure 13. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 2, UK



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: All week 2 respondents n=1,757

When anticipating to plan or book next U.K. short break or holiday

- 38% have either already planned or intend to plan a U.K. short break or holiday by September (while for booking it's 32%)

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

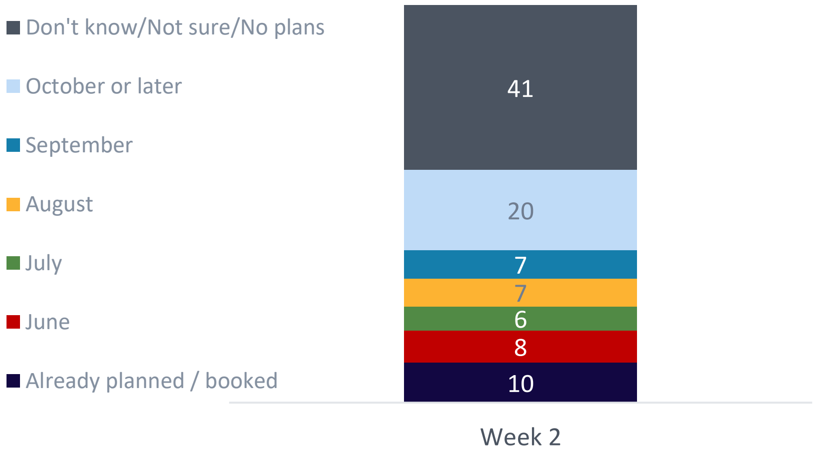
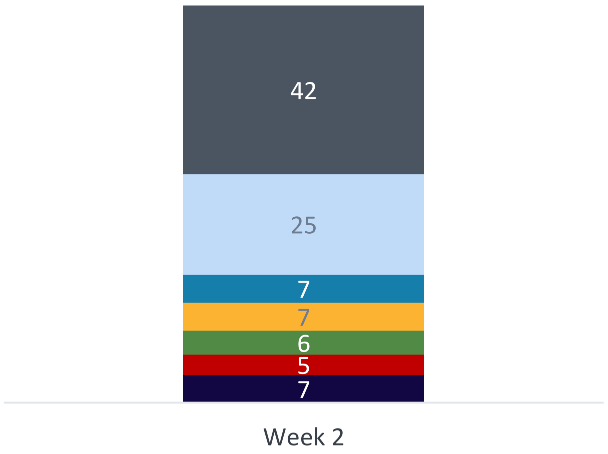


Figure 15. When anticipate BOOKING next UK holiday or short break, Percentage Week 2, UK



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: All week 2 respondents n=1,757

When anticipating to plan, book or go on next U.K. short break or holiday

- 22% anticipate actually *going* on their next U.K. short break or holiday by this September, significantly higher than the 19% intending to do so in week 1

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

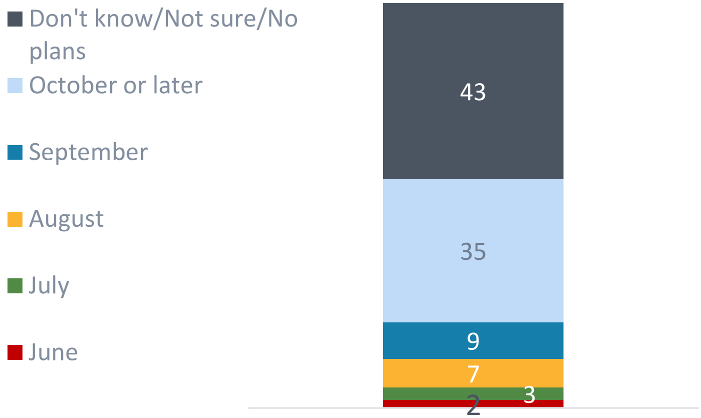
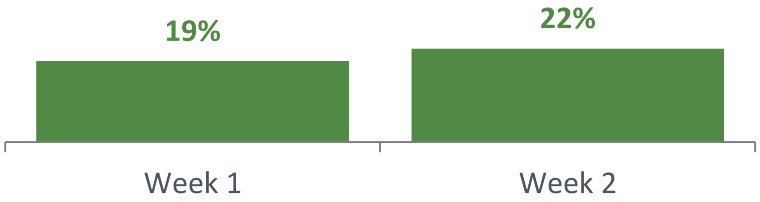


Figure 17. Proportion expecting to go on next UK trip by September, Percentage week-on-week, UK

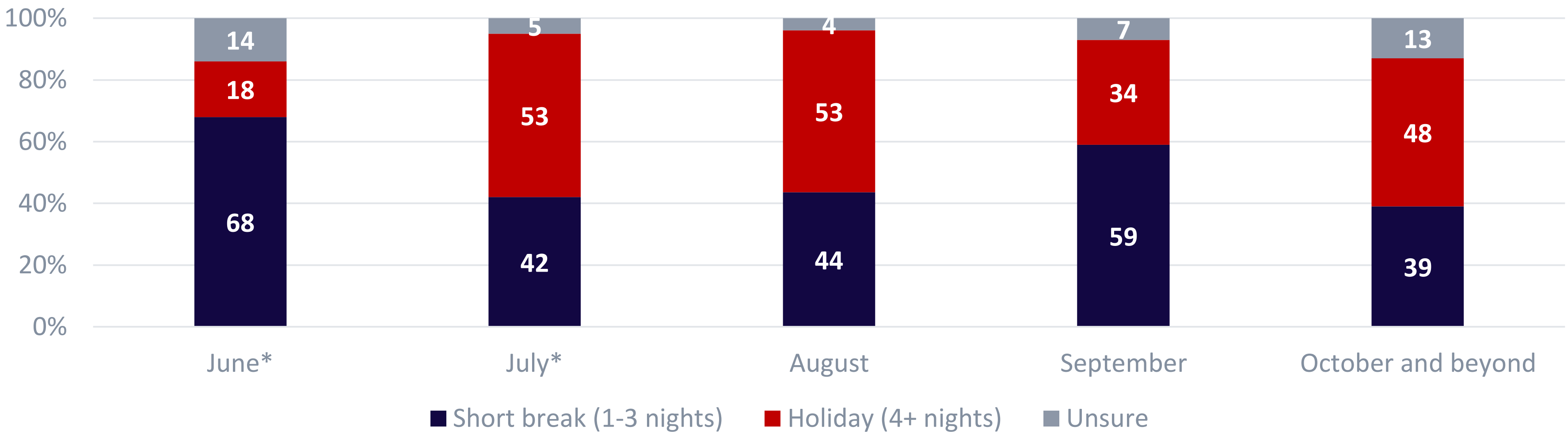


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Week 1 n=1,753; Week 2 n=1,757

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

- Short breaks make up the majority of holiday types in June and September – the two shoulder months outside of the school summer holiday period. In July and August, holidays of 4+ nights make up the majority of intended trips
- Trips to the East of England, Scotland, and the South West of England index the highest for holidays of 4+ nights

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



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents intending to take next holiday in each time period June n=33*, July n=57, August n=130, September n=159, October and beyond n=624
*Indicates small base size. Please treat with caution.

Where planning on staying on next U.K. short break or holiday

- The South West, The North West and Scotland are the three destinations that are likely to generate the highest proportion of holidays and short breaks amongst U.K. adults between June to September
- From October onwards, the South West, Scotland, London and the North West are areas that index highest

Figure 19. Where planning on staying on next UK overnight trip in June to September, Percentage Week 2, Top 10, UK

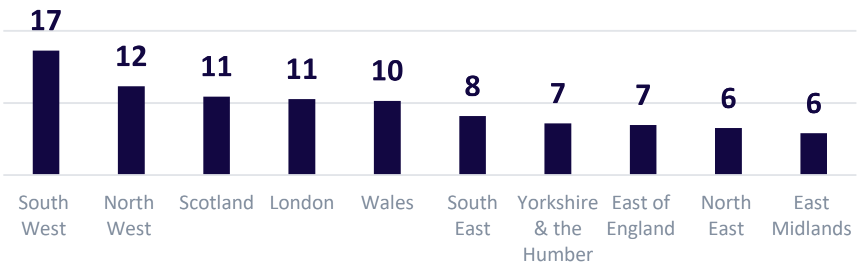
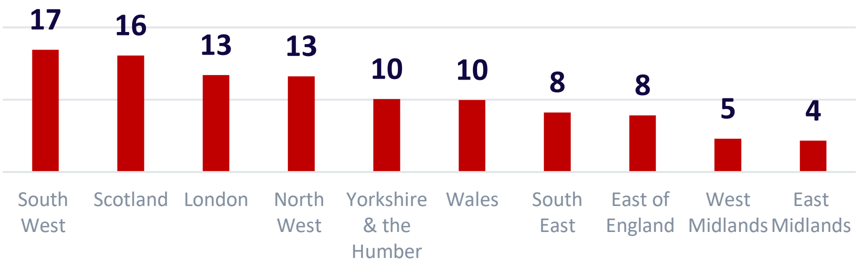


Figure 20. Where planning on staying on next UK overnight trip from October onwards, Percentage Week 2, Top 10, UK



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 the UK between June and September n=379 and from October onwards n=624

Main mode of transport for next U.K. 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.

Figure 21. Top 5 main modes of travel of destination for trip in June to September, Percentage Week 2, UK

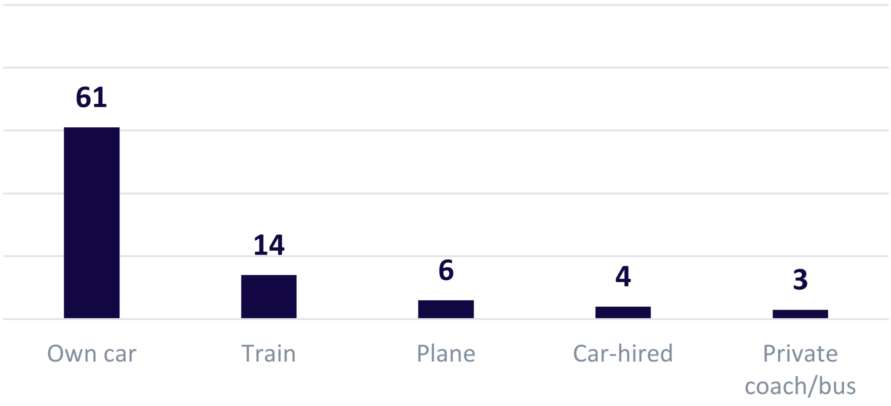
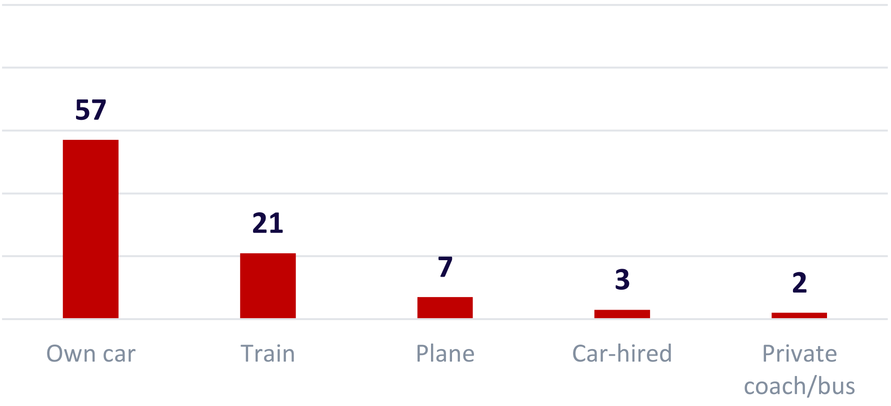


Figure 22. Top 5 main modes of travel of destination for trip from October onwards, Percentage Week 2, UK



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 the UK between June and September n=379 and from October onwards n=624

Type of destination for next U.K. short break or holiday

- Traditional coastal/seaside town, city or large town and countryside or village are the three main destination types for summer trips (each at 28%) although rural coastline is also a popular choice (23%).
- From October onwards, countryside or village and traditional coastal/seaside towns are the main destination types (both at 32%), followed by city or large town (29%)

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

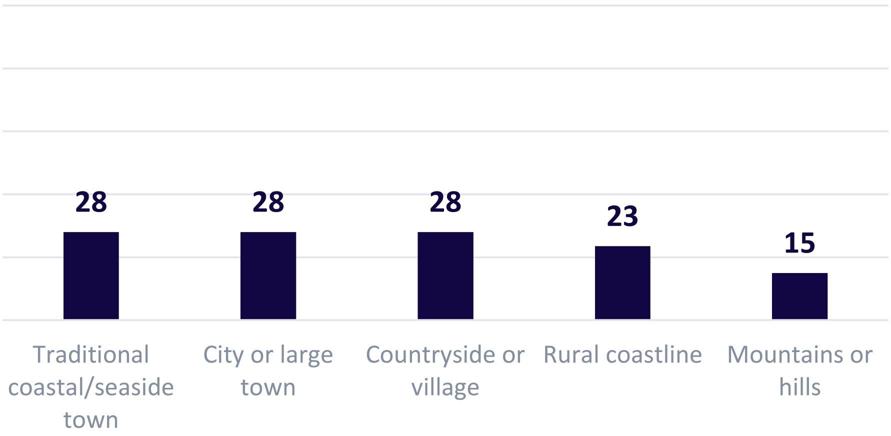
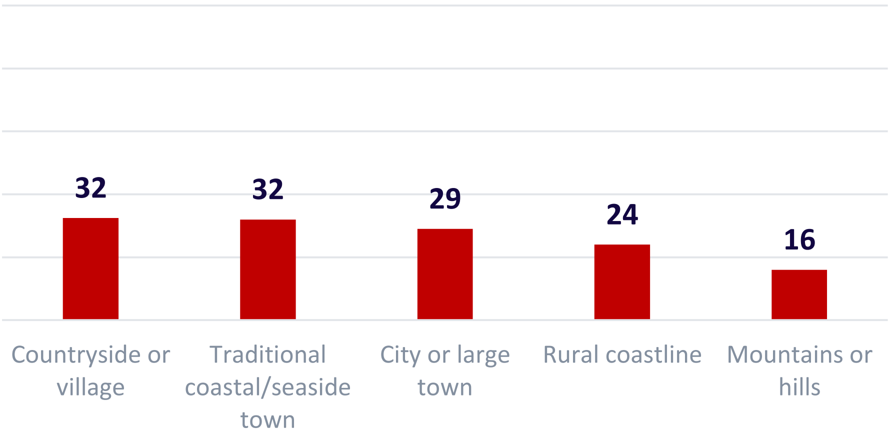


Figure 24. Main type of destination for trip from October onwards, Percentage Week 2, UK



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 the UK between June and September n=379 and from October onwards n=624

Type of accommodation for next U.K. short break or holiday

- ‘Hotel/motel/inn’ (37%) is the main type of accommodation U.K. holiday-makers are likely to stay at on their trip between June and September, followed by ‘private home’ (33%) and ‘caravan/camping’ (30%).
- ‘Hotel/motel/inn’ is also the most popular type of accommodation from October onwards (significantly higher at 46%), followed by ‘commercial rental’ (35%) and ‘private home’ (35%).

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

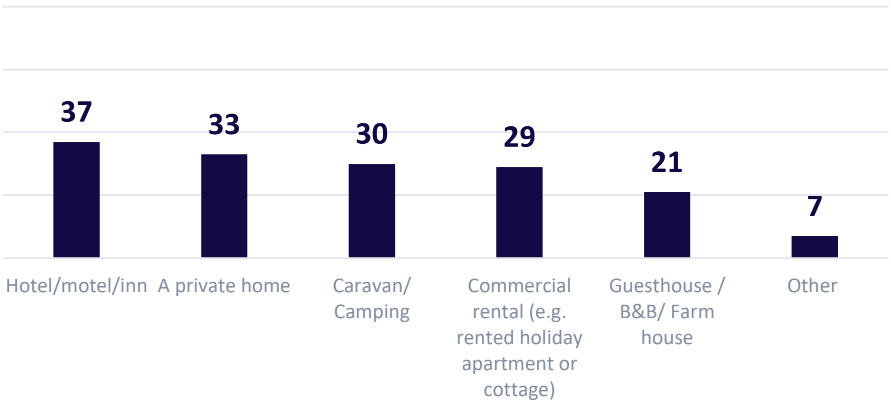
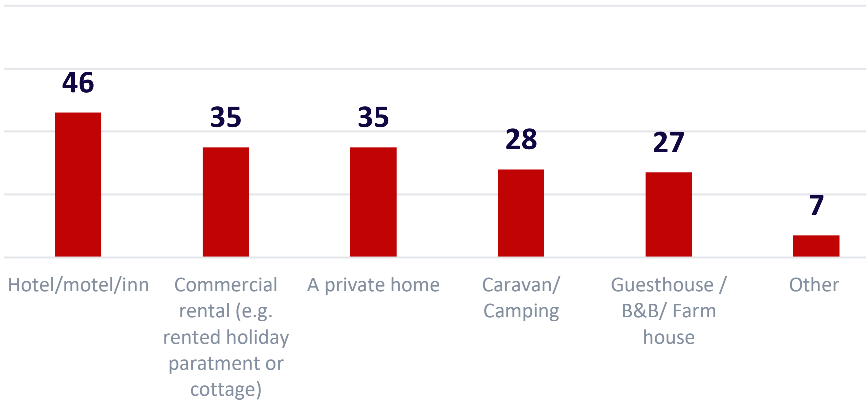


Figure 26. Accommodation planning on staying in on next UK overnight trip from October onwards, Net percentage Week 2, UK

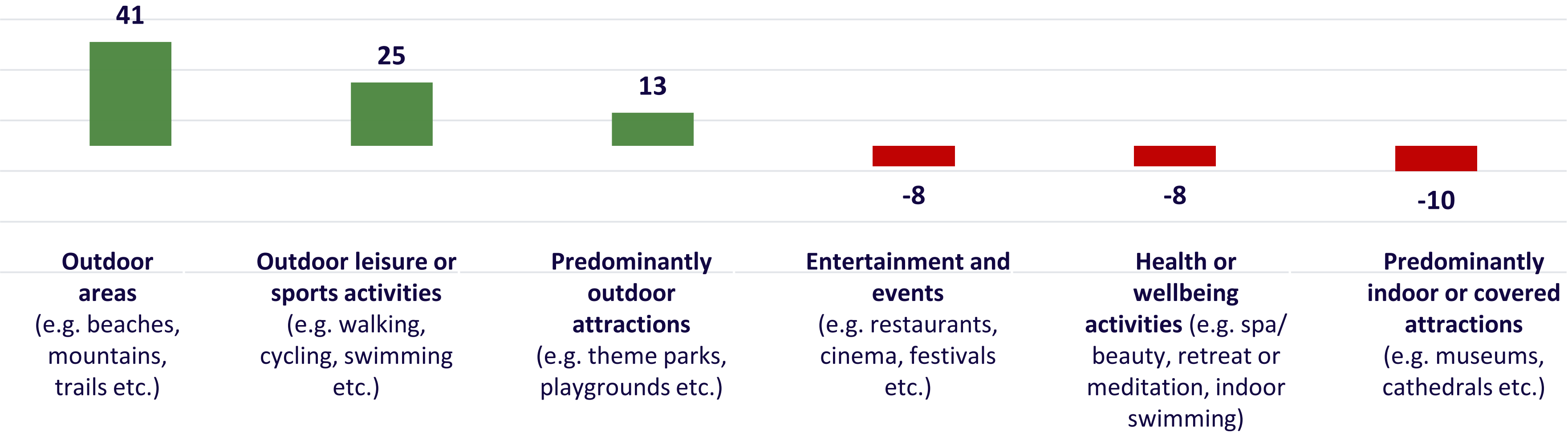


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in the UK between June and September n=379 and from October onwards n=624

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. Entertainment and events, health or wellbeing facilities and indoor attractions are likely to attract fewer visitors/engagement than 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 2, UK

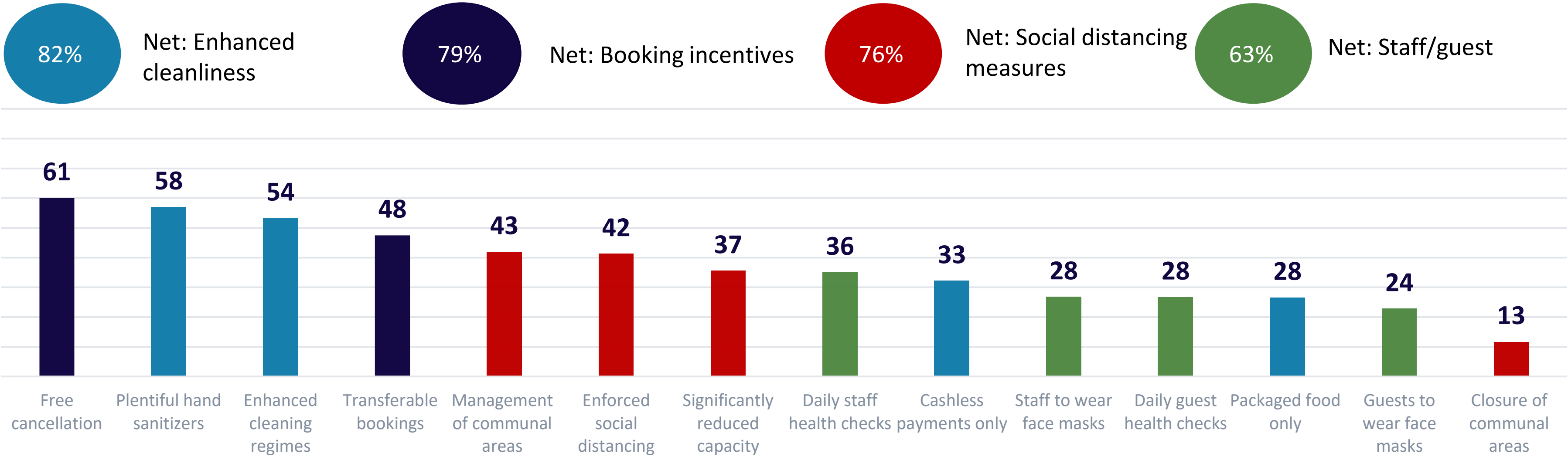


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All week 2 respondents n=1,757

Reassurance needed for people staying in a hotel post-lockdown

- Enhanced cleanliness (82%), booking incentives (79%) and social distancing measures (76%) are the key conditions for accommodation providers to have in place for the majority of U.K adults planning on taking a summer holiday this year. Offering free cancellation is the single most important factor.

Figure 28. Top 10 conditions that would need to be met to feel comfortable staying at a hotel after the lockdown has been lifted, Percentage and Net Percentages Week 2, UK



VC5c. 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: All planning on a summer holiday in 2020 n=236

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 the sample 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.