COVID-19 Consumer Weekly Tracker

Week 12

Fieldwork Period: 3 August – 7 August

U.K. Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have 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.
- This tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales. The survey is repeated across a 13 week period with the first wave published on 1 June 2020.
- The results are made publicly available and updated each week at the following website:

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

Fieldwork Periods

Project Period	Fieldwork Period
Week 1	18 – 22 May
Week 2	25 – 29 May
Week 3	1 – 5 June
Week 4	8 – 12 June
Week 5	15 – 19 June
Week 6	22 – 26 June
Week 7	29 June – 3 July
Week 8	6 – 10 July
Week 9	13 – 17 July
Week 10	20 – 24 July
Week 11	27 – 31 July
Week 12	3 – 7 August
Week 13	10 – 14 August

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Week 12: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	**Week 11**	**Week 12**	**Weekly Shift**
National mood (average score out of 10)	6.7	6.6	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	16%	12%	-4*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.55	2.58	+0.03
Normality score (proportion expecting normality by September)	6%	3%	-3*
The main reasons for not feeling confident about taking a trip between by September (Top 2)	1. Concerns about catching COVID-19 2. Fewer things to do/places to visit	1. Concerns about catching COVID-19 2. Restriction on travel from government	New No.2

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

Key Metrics	**Week 11**	**Week 12**	**Weekly Shift**
Anticipated number of U.K. short breaks compared to normal (% more/the same)	43%	42%	-1
Anticipated number of U.K. holidays compared to normal (% more/the same)	40%	39%	-1
UK near-term holiday/short break confidence (August/Sept. confident)	30%/37%	31%/33%	+1/-4*
UK medium-term holiday/short break confidence (Oct-Dec confident)	44%	38%	-6*
Proportion going/been on a UK short break *or* holiday between July-Sept	31%	30%	-1
Split between holiday / short break / don't know for next trip by Sept	42%/54%/4%	41%/55%/5%	-1/+1/+1

Week 12: Scorecard of Key Metrics (2)

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

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

Key Metrics	Week 11	Week 12	Weekly Shift
Leading England destination likely to stay in between July – Sept	South West	South West	No change
Main *type* of destination likely to stay in between July – Sept	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between July - Sept	Caravan/camping and Commercial rental	Caravan/camping	New sole no. 1

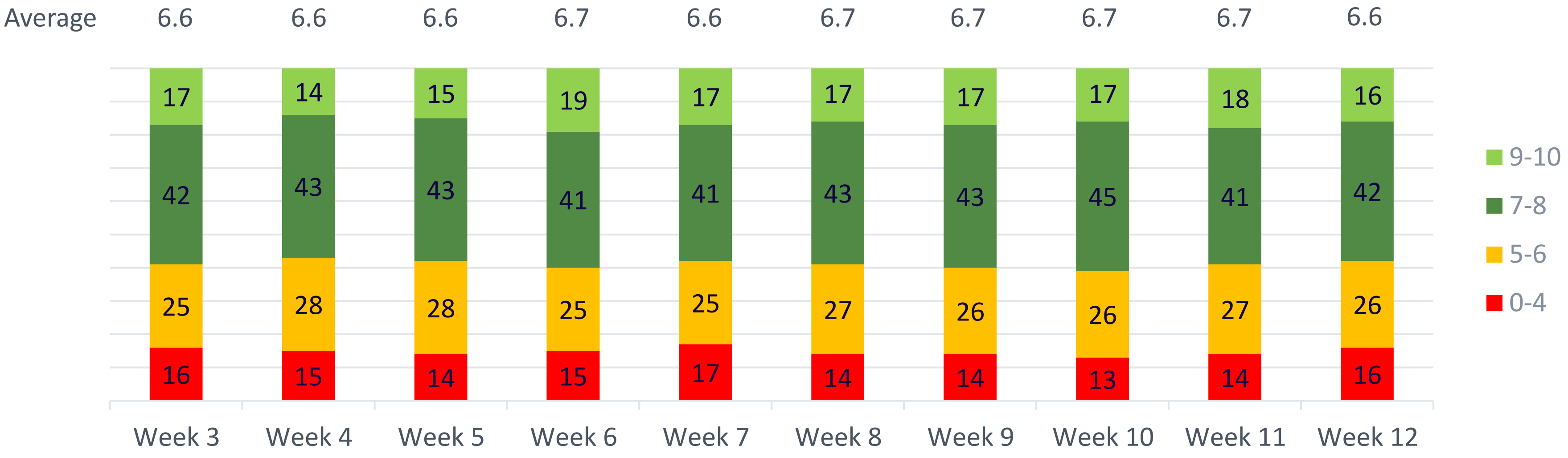
Table 4. Top line Metrics – Broader leisure activity

Key Metrics	Week 11	Week 12	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

- The average mood of UK residents remains at 6.6 out of 10
- There has been a marginal rise in those providing a 0-4 out of 10 rating, from 14% in Week 11, to 16% in Week 12

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

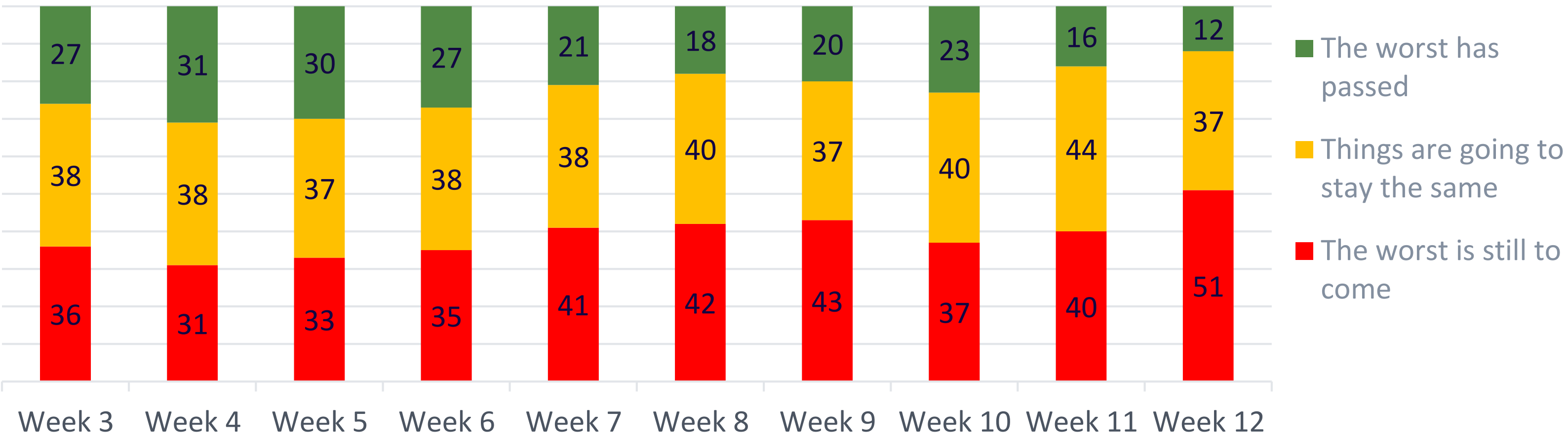


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Week 12 n=1,755

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

- 12% of the U.K. population feel that 'the worst has passed' in relation to COVID-19. This is significantly the lowest proportion seen so far in the research
- Similarly, over half of respondents now believe that the worst is still to come; a significant rise on any previous week and an indication of a change in outlook

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 12 n=1,755

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

- 'Later in 2021' is increasing its status as the most commonly selected option for expectations of normality returning. Only 3% think this will happen by September, significantly lower than last week
- The proportion expecting normality by December drops to 15%, significantly lower than the previous week as expectation shifts to 2021

Figure 3. Perceptions of when things will return 'close to normal' Percentage Week 12, UK

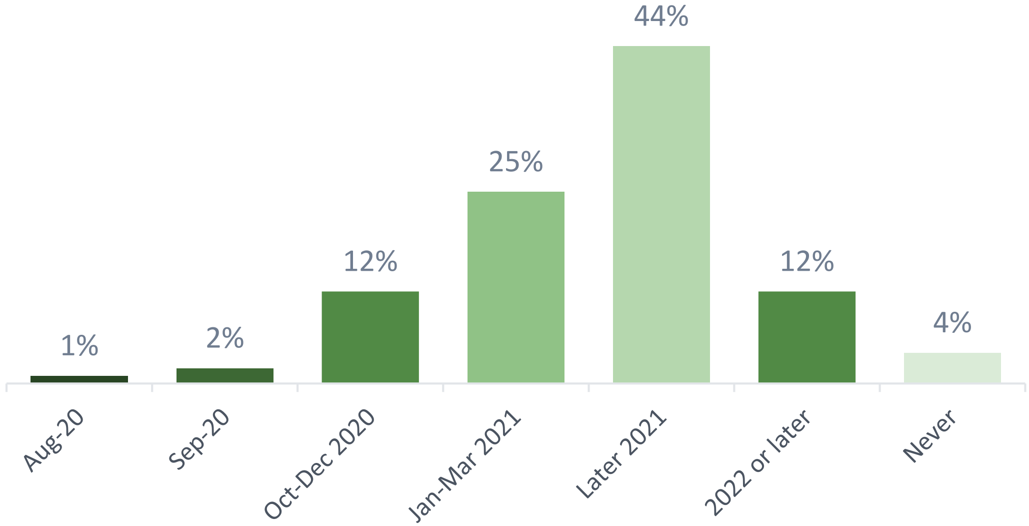


Figure 4. Proportion expecting normality by September, Percentage week-on-week, UK

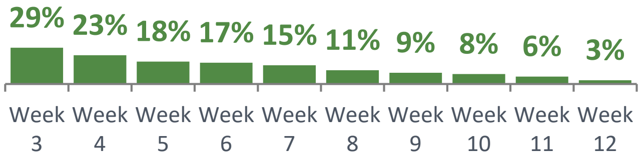
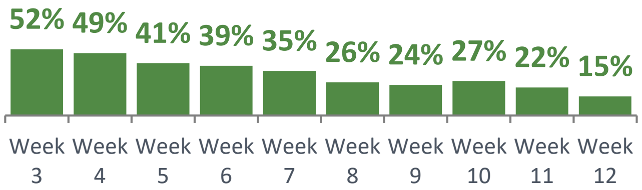


Figure 5. Proportion expecting normality by December, Percentage week-on-week, UK

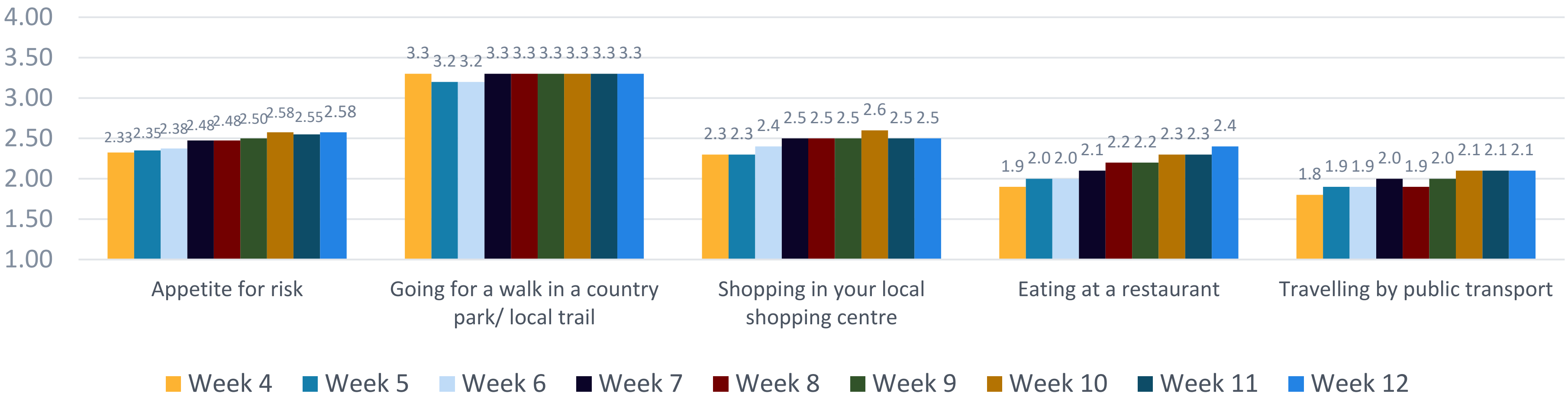


Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All respondents. Week 12 n=1,755

Level of comfort undertaking ‘everyday’ activities with an ‘appetite for risk’

- The ‘appetite for risk’ is slightly higher than in week 11 with a score of 2.58 out of 4 (4 representing ‘very comfortable’)
- Comfort scores have remained consistent for all activities, with the exception of ‘eating at a restaurant’ which climbs by 0.1 to 2.4, the highest so far

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, 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: appetite for risk’ is calculated as a straight average of the four scores. Week 12 n=1,755

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

- Confidence in the ability to take a U.K. short break or holiday in August remains consistent at around 3 in 10
- Confidence for a U.K. trip later in the year however drops significantly as people have greater concerns from October onwards

Figure 7. Confidence in taking a UK short break or holiday across a range of different months, Percentage Week 12, UK

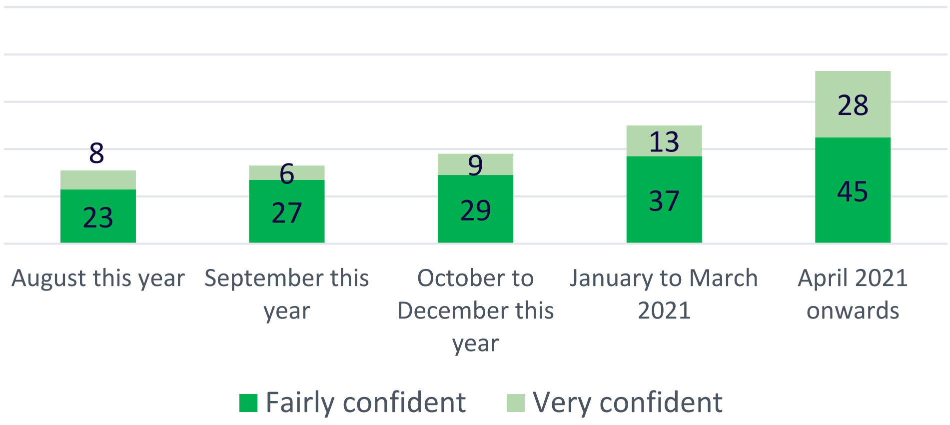


Figure 8. Confidence in taking a UK short break or holiday in August, Percentage week-on-week, UK

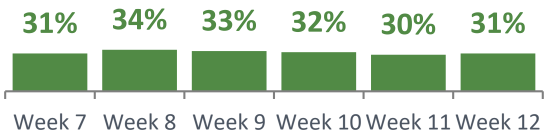
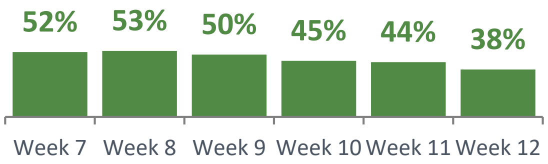


Figure 9. Confidence in taking a UK short break or holiday in October - December, Percentage week-on-week, UK



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: All respondents. Week 12 n=1,755

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

- We see consensus for the first time in the research between the time periods as to reasons for not feeling confident. ‘Concerns about catching COVID-19’ is the leading reason with 52% stating this in both time frames. The order of other reasons are the same but of slightly less concern from October onwards

Figure 10. Top 5 reasons for not being confident about travelling by September, Percentage Week 12, UK

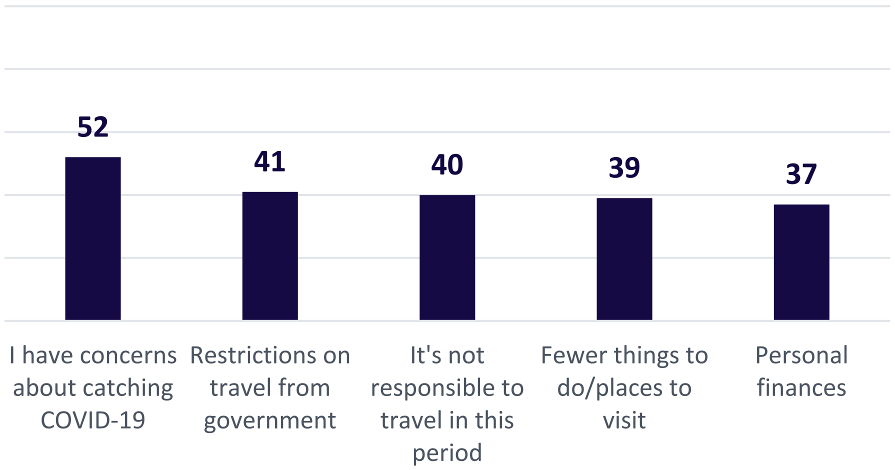
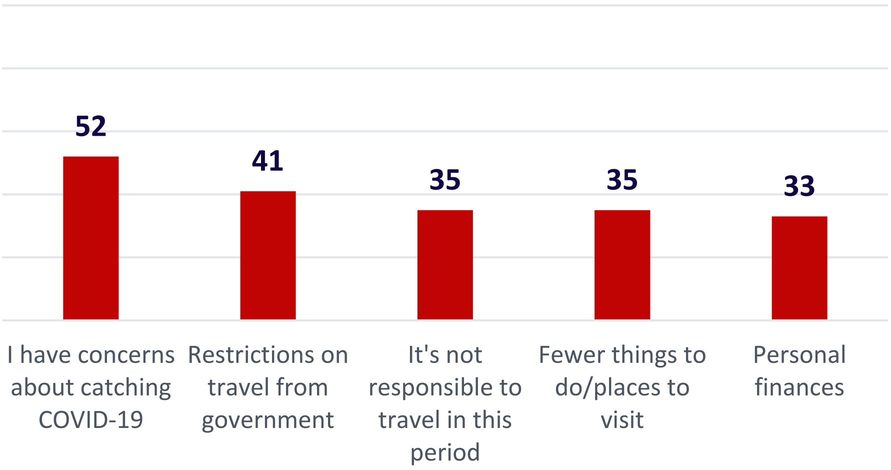


Figure 11. Top 5 reasons for not being confident about travelling from October onwards, Percentage Week 12, UK



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: Week 11 respondents not confident about taking a break by September n=570 and from October onwards n=847.

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

- The proportion of Britons either expecting to take more or the same amount of U.K. short breaks or holidays compared to normal is mostly consistent with last week; 42% intend to take the same amount or more U.K. short breaks (compared to 43% last week). 39% expressing this for holidays of 4+ nights (40% last week)

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

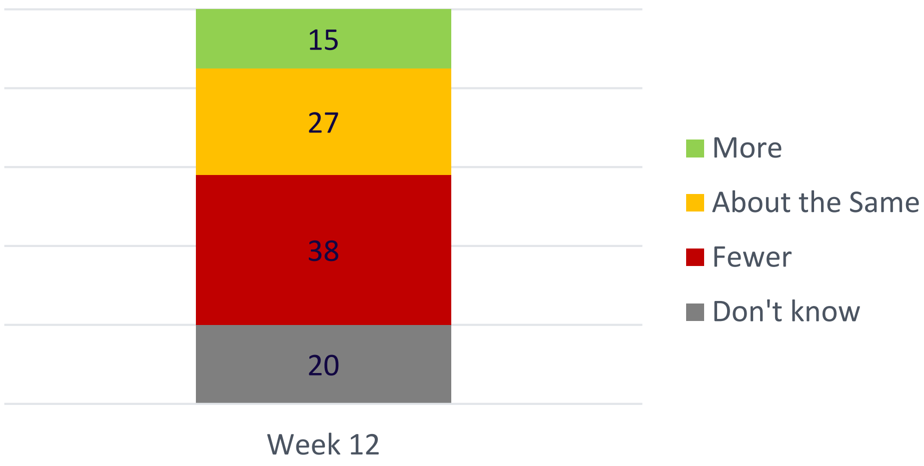
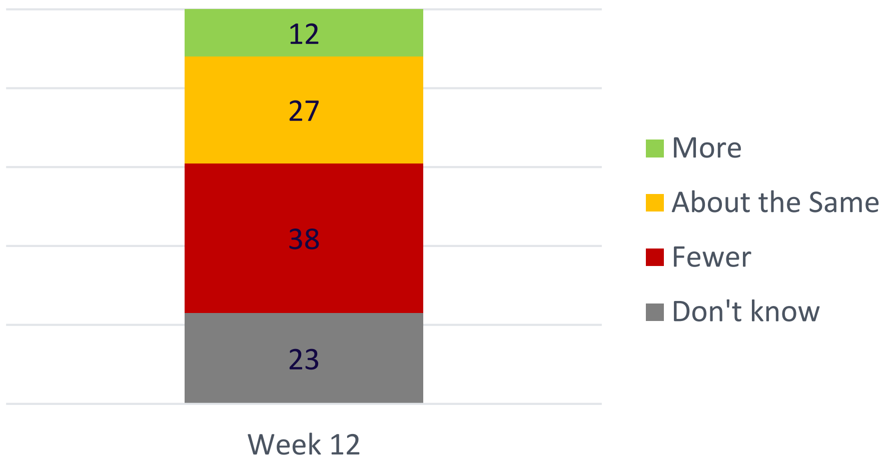


Figure 13. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 12, UK



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 respondents. Week 12 n=1,755

Anticipated number of OVERSEAS trips this year compared to normal

- 25% of U.K. adults intend to take more or about the same number of overseas short breaks compared to normal; significantly down from 28% last week. Overseas *holidays* are more consistent with last week with 25% this week compared to 26% last week

Figure 14. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Week 12, UK

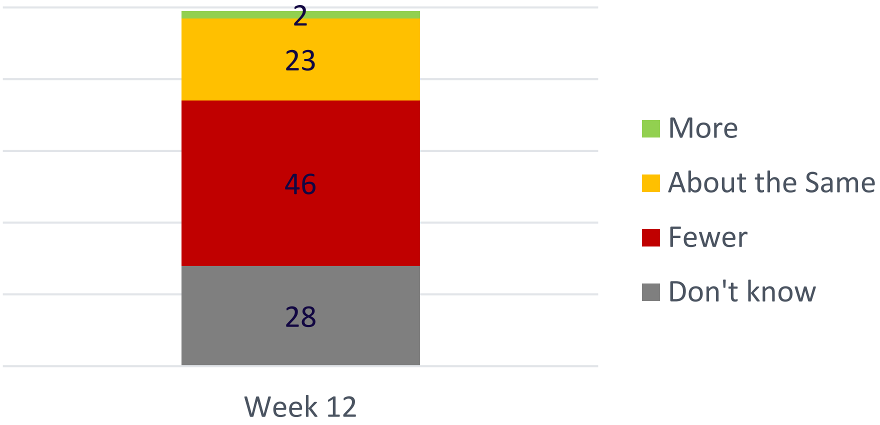
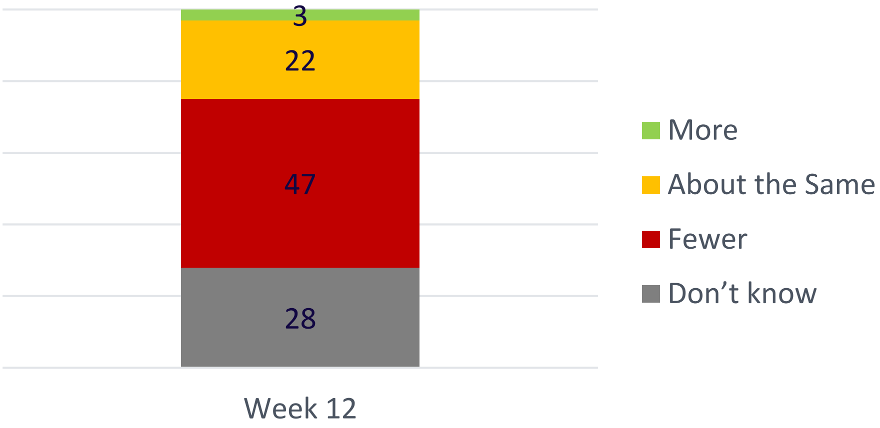


Figure 15. Number of OVERSEAS holidays (4+ nights) over rest of this year compared to normal, Percentage Week 12, UK

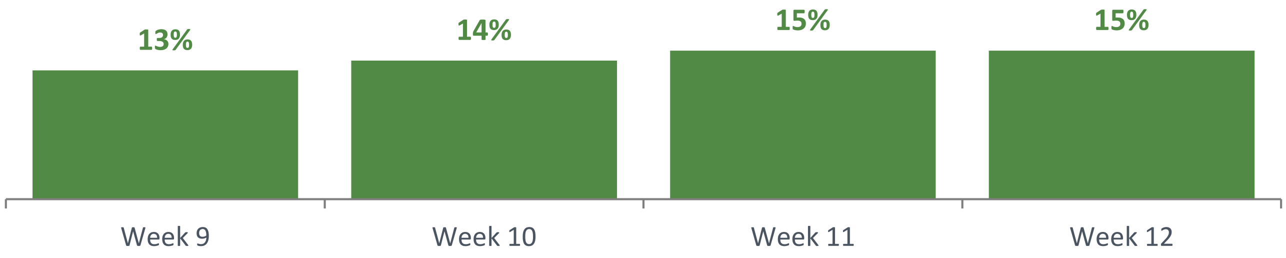


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All respondents. Week 12 n=1,755

How many have already been on a U.K. short break or holiday

- 15% of U.K. adults *have been* on a U.K. short break or holiday since the start of July, consistent with week 11

Figure 16. Proportion that have already been on a U.K. trip since the start of July, Percentage week-on-week, UK



QVB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK since the start of July?
Base: All respondents. Week 12 n=1,755

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

- 18% have already planned and 15% have already booked their next U.K. short break or holiday, very similar to week 11
- The biggest shift here is from those not planning a trip at any point to those who don't know when but would like to (both 21% compared to 25% and 17% respectively in week 11). It is a very similar movement for booking

Figure 17. When anticipate PLANNING next UK holiday or short break, Percentage Week 12, UK

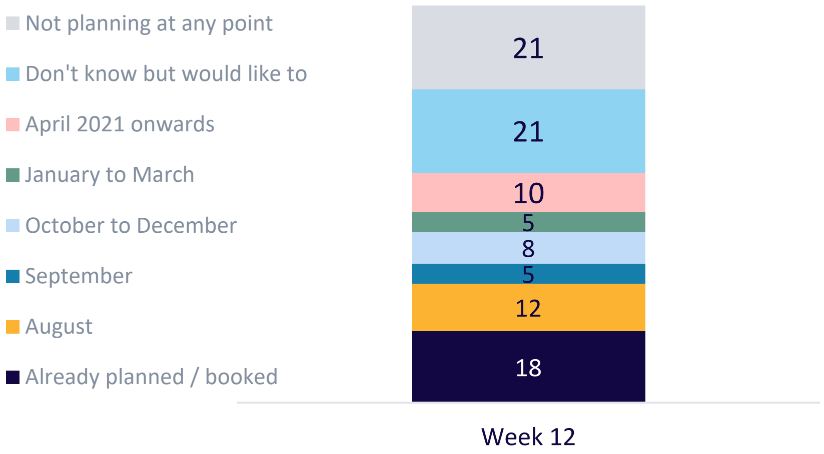
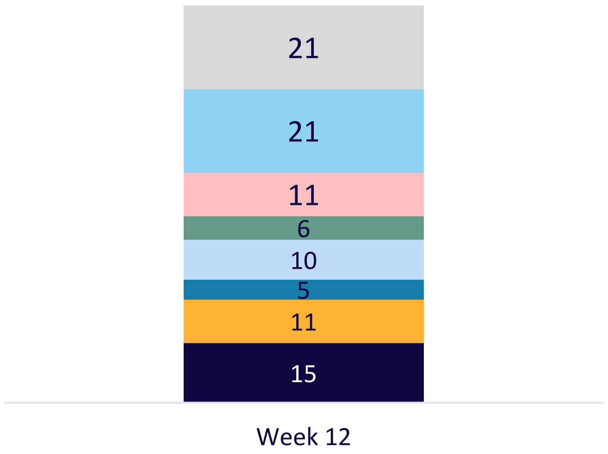


Figure 18. When anticipate BOOKING next UK holiday or short break, Percentage Week 12, UK



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 12 n=1,755

When anticipating going on next U.K. short break or holiday

- 1 in 5 U.K. adults anticipate *going* on a U.K. short break or holiday by this September, however adding in those who have already been on a trip since the start of July, the 'July to September' figure comes to 30%, consistent with the figure from week 11.

Figure 19. When anticipate GOING on next UK trip, Percentage Week 12, UK

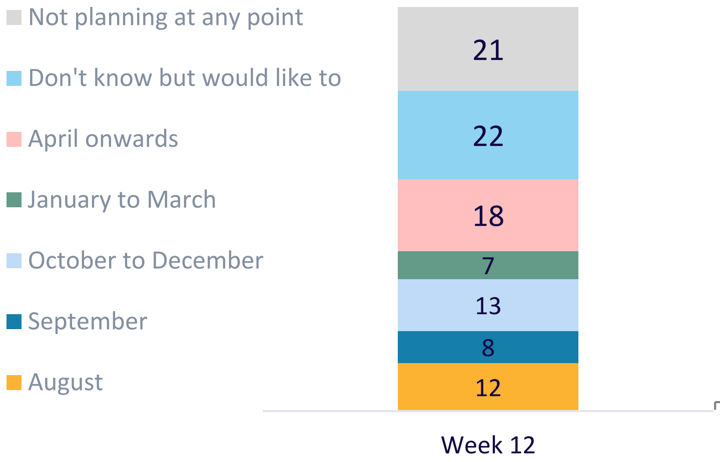
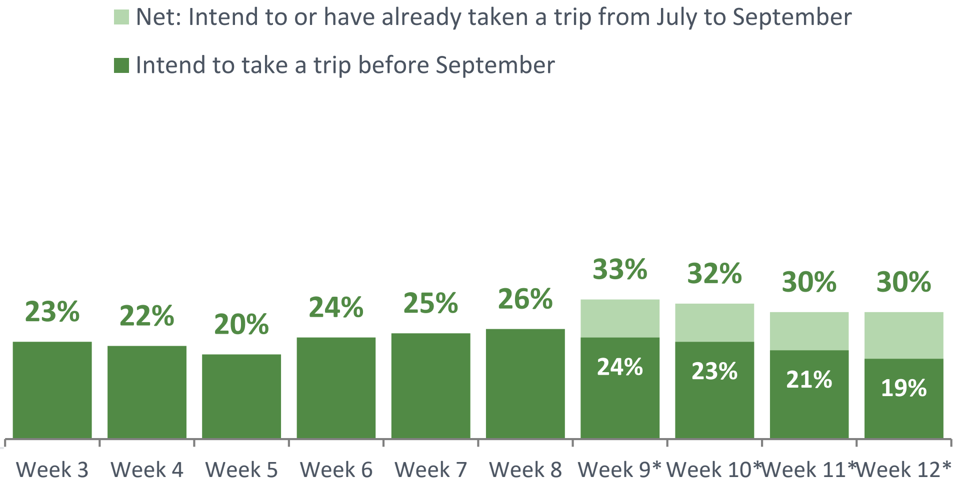


Figure 20. Proportion expecting to go on a short break/holiday by September, Percentage week-on-week, UK



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? VB13a: Now reflecting on your recent behaviour, have you already taken an overnight short break or holiday in the UK during July?
Base: All respondents. Week 12 n=1,755. *Light shade is percentage who have already been on a trip this summer.

Proportion that have already planned or booked their next U.K. holiday or short break

- 43% of U.K. summer intenders have not yet planned their next trip with 51% still yet to book. These numbers are dropping but still represent a large proportion of travellers. Winter travellers have seen an increase in bookings with now 1 in 5 having already booked their trip up from 17% in the previous week

Figure 21. Proportion of Intenders that have already *planned* their trip, Percentage Week 12, UK

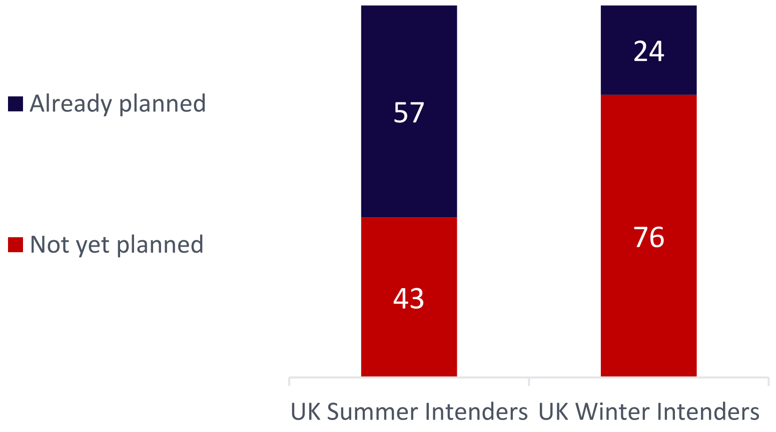
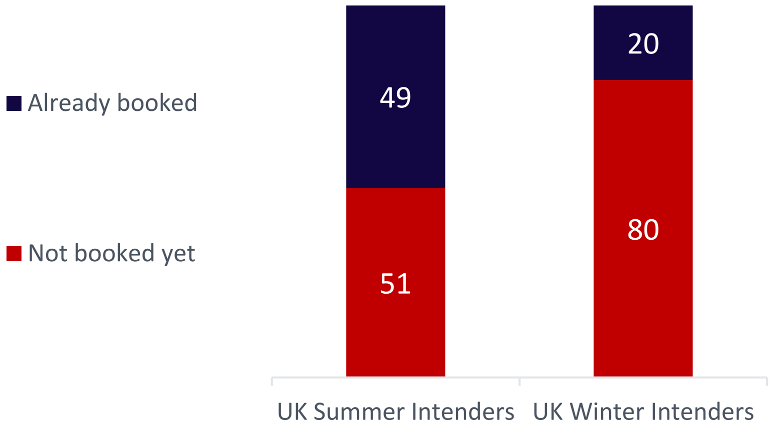


Figure 22. Proportion of Intenders that have already *booked* their trip, Percentage Week 12, UK

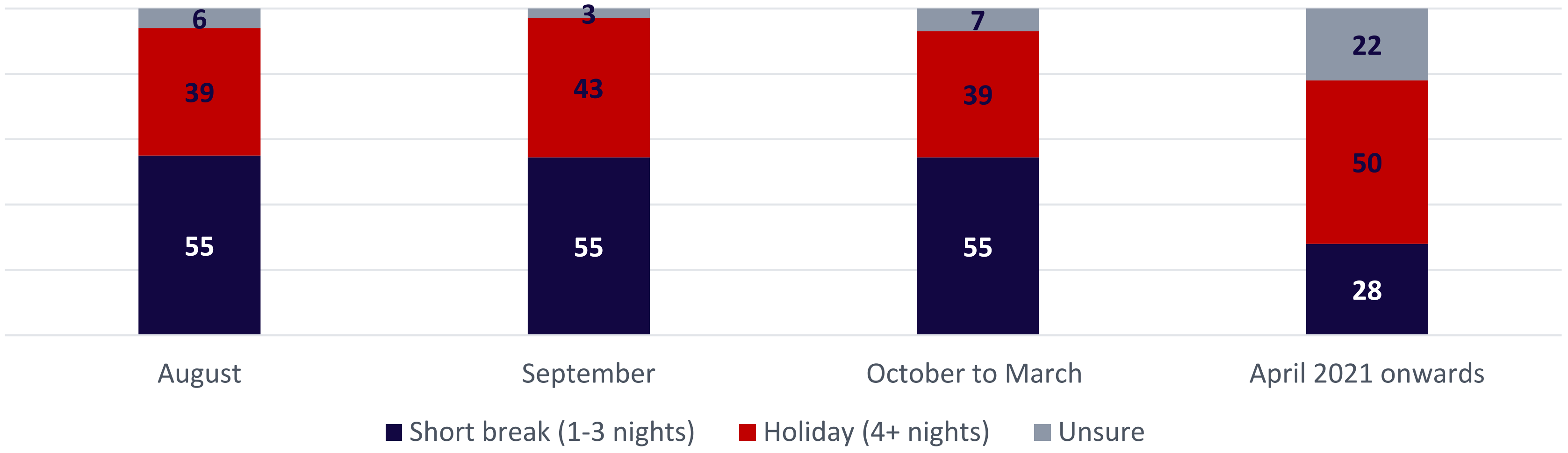


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All week 12 respondents planning on taking a holiday or short break in the UK by September n=340 and from October to March n=377

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

- Domestic short breaks are more expected than holidays of 4+ nights until at least next Spring. Holidays are still preferred from April 2021 onwards

Figure 23. Length of next UK holiday or short break by time period, Percentage Week 12, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All week 12 respondents intending to take next holiday in each time period August n=208, September n=132, October to March n=377; April onwards n=314

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

- The South West is significantly more likely than any other U.K. region to generate short break and holiday visitors by September this year (22% intending to visit). The South West is followed by Scotland (13%) and the North West (12%). London remains 8th in the list
- The South West of England, Scotland and London are the parts of the UK most likely to generate short breaks and holidays between October and March; London more than doubles it's proportion compared to the summer

Figure 24. Where planning on staying on next UK overnight trip by September, Percentage Weeks 10-12 merged data, UK

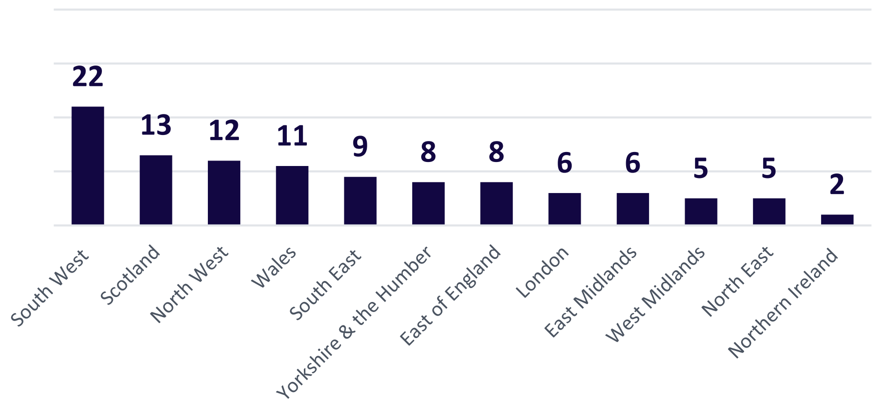
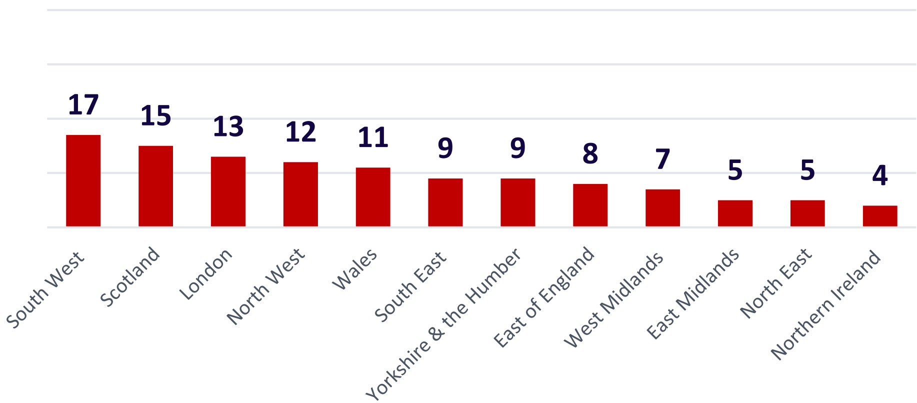


Figure 25. Where planning on staying on next UK overnight trip from October to March, Percentage Weeks 10-12 merged data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All week 10-12 respondents planning on taking a holiday or short break in the UK by September n=1,115 and from October to March n=1,119. Three weeks of research merged to increase statistical reliability

Main mode of transport for next U.K. short break or holiday

- Across both time periods, ‘own car’ increases its margin as the leading mode of transport although significantly more so before October. Train is the second most preferred mode across both periods although now fewer than 1 in 10 intend to use them this summer; the lowest proportion yet
- 12% of summer U.K. intenders anticipate using public transport to go on their next short break or holiday

Figure 26. Top 5 main modes of travel to destination for trip by September, Percentage Week 12, UK

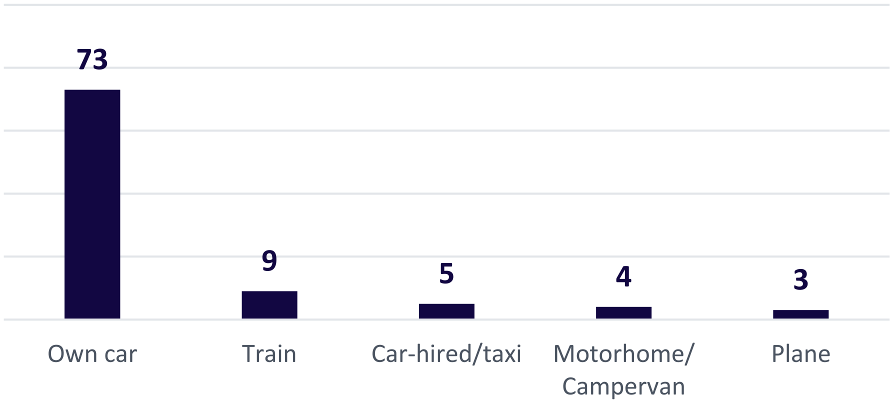
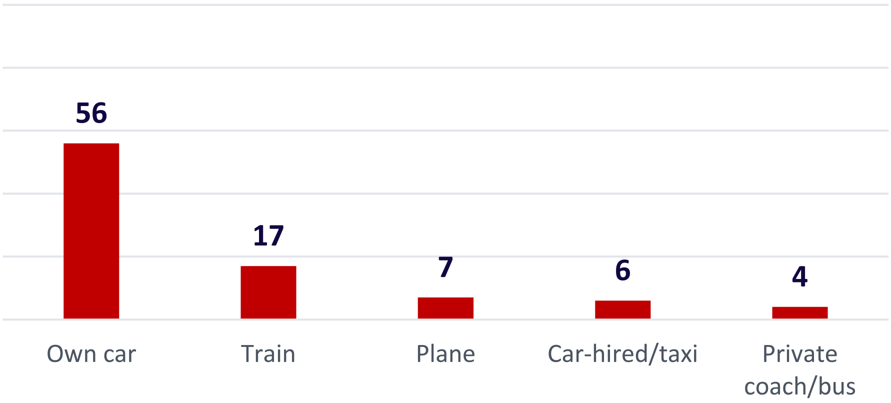


Figure 27. Top 5 main modes of travel to destination for trip from October to March, Percentage Week 12, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All week 12 respondents planning on taking a holiday or short break in the UK by September n=340 and from October to March n=377

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

- ‘Countryside or village’ (36%) stays ahead of ‘traditional coastal/seaside town’ (32%) as the main destination type for a trip by September. ‘Rural coastline’ and ‘city or large town’ (both 22%) are the next most preferred destination types although significantly less so
- Between October and March, ‘city or large town’ (31%) is the most preferred destination type, significantly more so than before October, whilst ‘countryside or village’ and ‘traditional coastal/seaside town’ both see significant drops

Figure 28. Main type of destination for trip by September, Percentage Weeks 10-12 merged data, UK

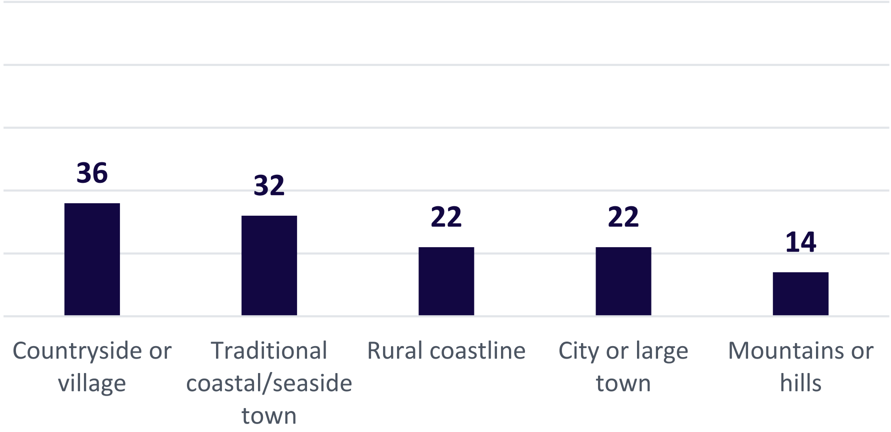
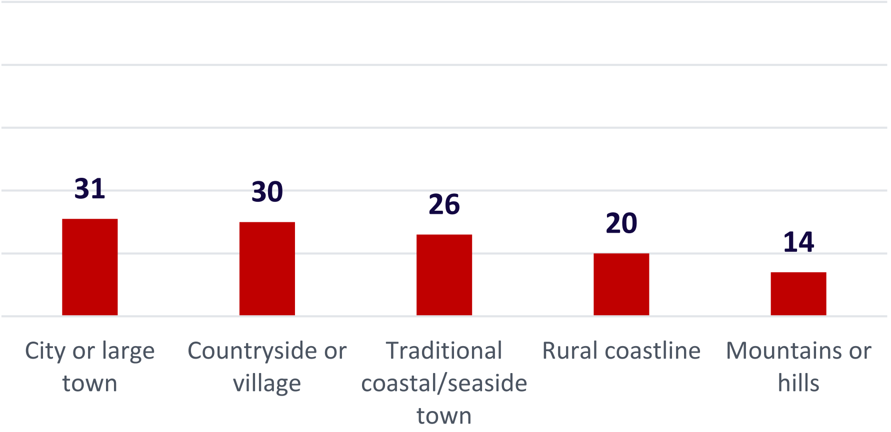


Figure 29. Main type of destination for trip from October to March, Percentage Weeks 10-12 merged data, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All week 10-12 respondents planning on taking a holiday or short break in the UK by September n=1,115 and from October to March n=1,119. Three weeks of research merged to increase statistical reliability

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

- ‘Caravan/camping’ (33%) remains just the most preferred type of accommodation for the next holiday or short break followed closely by ‘commercial rental’, ‘private home’ and ‘hotel/motel/inn’ (all 32%) this summer
- Between October and March, ‘hotel/motel/inn’ (36%) is the third most likely accommodation type. ‘A private home’ (40%) and ‘commercial rental’ (38%) make up the top two preferred accommodation types

Figure 30. Accommodation planning on staying in on next UK overnight trip by September, Net percentage Weeks 10-12 merged data, UK

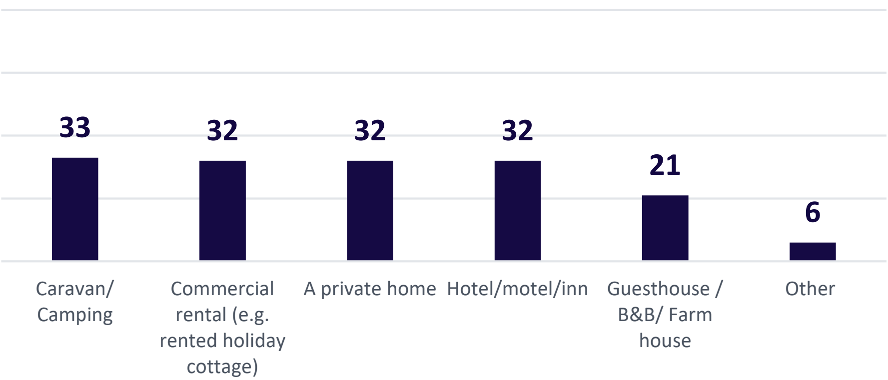
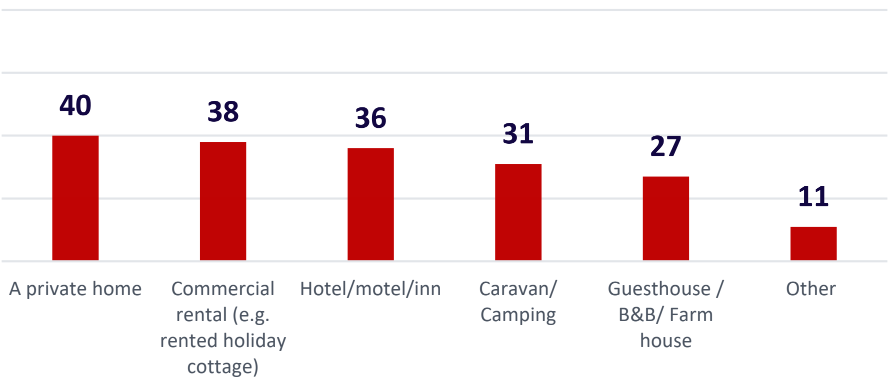


Figure 31. Accommodation planning on staying in on next UK overnight trip from October to March, Net percentage Weeks 10-12 merged data, UK

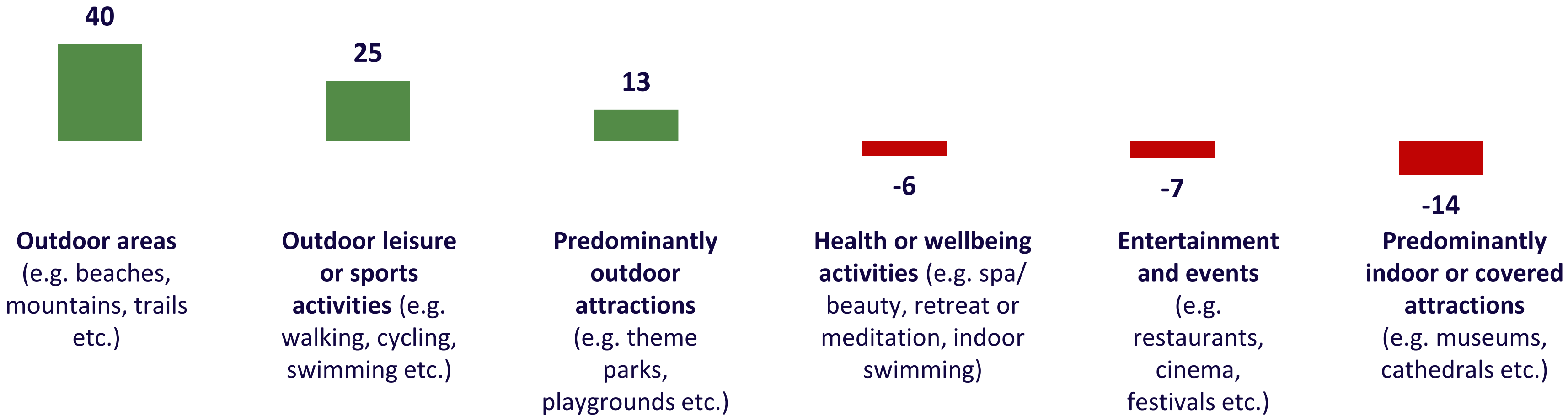


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All week 10-12 respondents planning on taking a holiday or short break in the UK by September n=1,115 and from October to March n=1,119.
Three weeks of research merged to increase statistical reliability

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal (net +40), followed by outdoor leisure or sports activities (net +25) which has risen from week 11 (net +19). Health or wellbeing activities (net -6), entertainment and events (net -7), and indoor attractions (net -14) remain most likely to attract fewer visitors/engagement than normal with all the numbers dropping since last week

Figure 32. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Week 12, UK

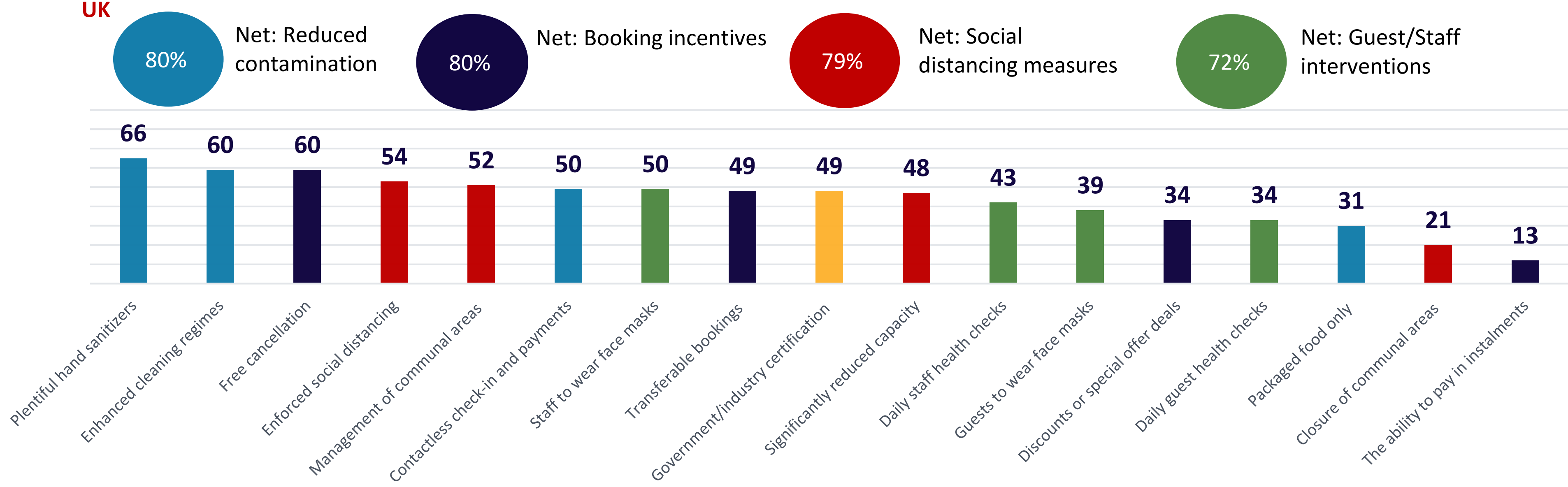


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All Week 12 respondents n=1,755

Conditions essential for people to stay in accommodation this summer

- Steps to reduce cross-contamination (80%), ‘booking incentives’ (80%) and ensure social distancing (79%) are the top three assurances the public need when planning a stay in accommodation this summer

Figure 33. Conditions that are essential for a stay in accommodation this summer, Percentage and Net Percentages Week 12, UK



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: All week 12 summer intenders n=340.

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 12 of the COVID-19 consumer weekly tracker, with comparisons to Weeks 1-11 where appropriate. Week 12 fieldwork was conducted between 3rd to 7th August 2020.

Master Data Table

- To access a .csv file of the data contained within the charts, please open this 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.