

## Consumer Confidence & Perceptions around the Impact of COVID-19

North West Research & Strategy are bringing you regular updates on the key points coming out of the COVID-19 pandemic through our weekly review of research and intelligence from the visitor economy sector. This week we have used the [COVID-19 – Attitude Tracker](#) from BVA BDRC & Alligator Digital which looks at UK consumer and business confidence, as well as VisitBritain's [COVID-19 Consumer Sentiment Tracker](#) and ALVA's [Attractions Recovery Tracker](#). We hope these consumer and business insights help assist with your current business resilience and planning for recovery post-COVID-19. Don't forget, you can also get further information on Government support and [sector specific advice](#) on the [Growth Platform website](#).

Some highlights from the COVID-19 – Attitude Tracker report include:

- Only 41% of respondents think life will return to 'normal' by the end of 2020 (compared to 49% last week), and 3 in 10 fear it will be later in 2021 or beyond.
- The mood of UK businesses has improved by 0.1 since June to 6.2 but remains lower than the mood of consumers (6.6). Business confidence in the Government handling of the process is lower than consumer views, with over half (52%) "not confident".
- Since the reopening of many outdoor attractions, 1 in 3 'Travel Activists' plan to have a day out at an attraction by end of August, reflecting that potential visitors now have greater reassurance that visits are both possible and safe.
- Despite a decrease in average lead times, the proportion who intent to book a UK holiday in the next 3 months has decreased from 29% last week to 26% this week.

- The proportion of those planning to visit a restaurant in the next 3 months has remained constant since last week, whilst the proportion who plan to go shopping in the next 3 months has increased to 48% after a decrease last week.
- Intention to travel by train in the next 3 months has decreased for the second week in a row, and now stands at 19% (compared to 22% last week).

Main points from VisitBritain's Consumer Sentiment tracker include:

- This week's 'appetite for risk' score has remained constant at 2.33 out of 4. Eating at a restaurant is the only activity to see a decrease since last week, while travelling by public transport has remained constant at 1.8.
- Only a minority of respondents feel confident they would be able to take a short break or holiday in July (10%), however, this increases for periods later in the year – confidence in September is 40% and October to December is 58%.
- In terms of where respondents plan on staying in the UK for an overnight trip between June and September, the North West ranks 3rd out of 10 options for the second week in a row, only behind the South West and Scotland. This drops to 4th out of 10 from October onwards.
- 25% of respondents indicated that a 'city or large town' would be their main type of destination for a trip in June-September, ranking it 3rd out of 5 options.
- Once again, we see that outdoor areas are most likely to attract more visitors/engagement than normal, whereas entertainment and events and indoor attractions are likely to attract fewer visitors/engagement than normal.

### AVLA's Attractions Recovery Tracker Includes:

- 10% of the market claim to have already visited an attraction, with country parks & nature reserves and gardens being the attractions respondents will be most likely to visit as soon as the opportunity arises.
- Early returning to attractions is most likely among younger adults – with 17% of those under 25 indicating that they have already visited at least one type of attraction, compared to 5% of 55-64-year-olds.
- There is a clear demand or services, especially toilets, to be available on re-opening, with half of the market (52%) stating that they would not visit an attraction that did not have their toilets open.
- However, toilets also remain an area of high anxiety, with 54% feeling more anxious or uncomfortable using them than usual at attractions. 54% also stated they will feel anxious or uncomfortable sitting indoors at cafes or restaurants.

### Help us help you by completing our Business Recovery Survey

In response to the outbreak of COVID-19, Growth Platform are currently undertaking a short survey aimed at Visitor Economy businesses in the Liverpool City Region to help identify specific initiatives that will be needed for recovery, and ensure your views are represented. You can access this survey [here](#). The deadline to submit your response is 8th July 2020.

Growth Platform

1 July 2020