

## 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](#). 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:

- Reflecting worries about the potential for a second wave, the proportion of respondents who fear that 'the worst is still to come' has increased to 41%, compared to 35% last week. Just 21% believe that 'the worst has passed' (compared to 27% last week).
- Only 35% of the population believe life will return to something close to normal by the end of 2020 – down from 86% three months ago.
- It is estimated that 47% of British adults fall into the three 'concerned' segments of the market ('COVID Cautious', 'COVID impacted' and 'anxious appreciator hermits'), although a third fall into the 'life goes on segment', meaning they are not worried about the risks associated with COVID-19 and want to get back to living their lives.
- The proportion of those who plan to go to a visitor attraction by the end of August has marginally increased this week to 29%.

- Despite museums opening from July 4th, there has been a slight decrease in the proportion who would visit a museum or gallery by September 2020 (14%, 1% down from last week).
- After two weeks of decline, the proportion who intend to visit a country park or scenic area by the end of August has increased by 4% this week, to 65%.
- Intention to take a UK holiday continues to increase, with 37% intending to do so by the end of September – the highest proportion recorded since the start of tracking.
- Half of respondents intend to visit a restaurant by the end of September – the highest proportion in five weeks. However, in the short term, the proportion intending to visit before the end of August has decreased slightly (36%, compared to 39% last week).
- While overall intention to use rail services remains low, the proportion who intend to travel by train by the end of August has increased this week (24%, compared with 22% last week).

Main points from VisitBritain's Consumer Sentiment tracker include:

- This week's 'appetite for risk' score stands at 2.5 out of 4, which is only marginally higher than last week (2.35). We are gradually seeing increases in comfort, with all four activities recording their highest levels of comfort since tracking began.
- The majority of respondents are confident that they will be able to take a UK trip between October and December this year (52%), and almost three-quarters (69%) are confident in doing this from January 2021 onwards.
- 'I have concerns about catching COVID-19' is the leading reason respondents give for not being confident about travelling, both between June and September and from October onwards.

- Compared to normal, the public still anticipate taking fewer short breaks (23% less) and holidays of 4+ nights (27% less) in the UK between now and the end of 2020. These figures are consistent with that recorded last week.
- In terms of where respondents plan on staying in the UK for an overnight trip between June and September, the North West ranks 5th out of 10 options for the third week in a row. This rises to 4th out of 10 from October onwards.
- For the second consecutive week, 23% 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. From October onwards, this figure rises to 30%, ranking it 2nd. For both time periods, 'countryside or village' is the most popular option.

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15 July 2020