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:

- This week we see a sharp decline in the proportion who believe that the 'worst has passed' (16%, compared with 23% last week), which could be linked to localised spikes in infection rates, as well as new concerns around the reopening of schools.
- As furloughed workers return to work, there has been an increase in the proportion of those who report being on reduced pay and working hours, and a smaller increase in the proportion those who have been made redundant, compared to results in April.
- Despite increasing last week, the proportion of adults who believe life will return to something close to normal by the end of 2020 has decreased by 6% to 22% this week, the lowest figure recorded since tracking began.
- The proportion of British adults who fall into the three 'concerned' segments of the market ('COVID Cautious', 'COVID Impacted' and 'Anxious Appreciator Hermits') has increased by 2% to 43% this week. The proportion of 'Pragmatic Policy Supporters' has increased by 1% to

21%, while the proportion who fall into the 'Life Goes On' has decreased by 2% to 37%.

- The proportion of those who plan to go to a visitor attraction by the end of August has decreased slightly to 34% (compared with 37% last week). Lead times for visiting remain shortest for country parks or scenic areas, and longest for theme parks, closely followed by aquariums.
- There has been a decrease in the proportion who intend to visit a zoo, an aquarium, a theme park, a small historic house, an outdoor park/scenic area and an indoor play area the end of August this week, perhaps reflecting concerns about a second wave and localised lockdowns.
- 19% of respondents plan to go on a UK holiday by the end of August (compared to 24% last week). Intentions to take a trip later in the year have remained fairly constant this week.
- In terms of leisure activities, lead times are the shortest for going shopping, and the longest for going to the cinema.
- The implementation of compulsory masks when shopping may have had a negative impact on the numbers planning to shop, with the proportion planning to do so in August falling from 53% to 50% and for September falling more significantly from 64% to 57%.
- For the second week in a row, intention to visit a restaurant in August has increased from 48% to 52%, likely reflecting the launch of the 'Eat Out to Help Out' scheme.

Main points from VisitBritain's Consumer Sentiment tracker include:

- This week's 'appetite for risk' score stands at 2.6 out of 4 for the second week in a row. 'Appetite for risk' for all activities has remained constant this week, with the exception of 'shopping in your local shopping centre' which has decreased by 0.1.
- Confidence in the ability to take a trip between October and December has slightly decreased this week (44%, 1% lower than last week), whilst 51% are confident they will be able to from January 2021 onwards (compared to 53% last week). This may reflect concerns about a second wave of COVID-19, or concerns about a potential recession.
- 'I have concerns about catching COVID-19' remains the leading reason respondents give for not being confident about travelling, both between June and September and from October onwards. This is then followed by 'fewer things to do/places to visit' in July to September, and 'it's not responsible to travel in this period' from October onwards.
- In terms of where respondents plan on staying in the UK for an overnight trip between June and September, the North West now ranks 3rd out of 10 options for the third week in a row, with 11% stating it as their preferred destination. From October onwards, the North West ranks 4th out of 10.
- 22% indicate that a 'city or large town' would be their main type of destination for a trip July-September, ranking it 4th out of 5 options. However, from October onwards, 'city or large town' is the most popular option, with 31% stating it as their preferred destination type.

Growth Platform

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