

## 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 following the lifting of lockdown measures, the proportion of respondents who fear that 'the worst is still to come' has increased to 42% (1% higher than last week). Just 18% believe that 'the worst has passed' (compared to 21% last week).
- Now just 26% of the population believe life will return to 'normal' by the end of the year, down from 25% last week and 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'), which is constant since last week. The proportion who fall into the 'Life Goes On', has decreased by 2% from last week, to 31%.
- The proportion of those who plan to go to a visitor attraction by the end of August has risen to 35% (the highest since tracking began), compared with 29% last week.

- There has been a marginal increase in the proportion who intend to visit a museum or gallery by the end of August (16%, compared to 14% last week), while intention to visit a zoo has decreased, with just 20% planning on doing so this year (compared to 28% two weeks ago).
- Although still high, intentions to visit an outdoor park or scenic area have decreased in the short term, with only 47% intending to do so before the end of July (compared with 56% last week).
- The proportion who plan to go on a UK holiday is still higher than those who plan on going on an overseas holiday, although appears to have peaked last week, with 32% planning on doing so by the end of September (compared with 37% last week).
- 35% of respondents plan on going shopping before the end of July – the highest figure since tracking began. However, the recent announcement on the compulsory wearing of face masks in shops in England may detract from the experience, so future intentions are not yet clear.
- Since restaurants have reopened, 6% of respondents have visited one. However, the proportion planning on doing so (again) by the end of August has declined to 33% this week, compared with 36% last week and 39% two weeks ago.

Main points from VisitBritain's Consumer Sentiment tracker include:

- This week's 'appetite for risk' score stands at 2.5 out of 4 for the second week in a row. While we are gradually seeing increases in comfort, comfort in travelling by public transport decreased by 0.1 this week.
- The majority of respondents are confident that they will be able to take a UK trip between October and December this year (53%, 1% higher than last week), and 71% (compared to 69% last week) are confident in doing this from January 2021 onwards.

- '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. Personal finances also play a part in this, with 37% stating it as a main reason for not being confident about travelling from October onwards.
- Compared to normal, the public still anticipate taking fewer short breaks (18% less, compared with 23% last week) and holidays of 4+ nights (23%, compared with 27% last week) in the UK between now and the end of 2020.
- 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 (compared to being 5th last week) for the third week in a row. From October onwards, the North West ranks 4th out of 10.
- 21% 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 35% stating it as their preferred destination type.

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