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:

- After an increase last week, the proportion who believe 'the worst is still to come' has decreased slightly – from 51% to 46%.
- Correspondingly, the proportion who believe there will be a second wave of coronavirus has decreased by 3% from last week, but still remains high at 85%. Unsurprisingly, those in the 'Life Goes On' segment are the least likely to believe that there will be a second wave.
- The proportion of British adults who fall into the three 'concerned' segments of the market ('COVID Cautious', 'COVID Impacted' and 'Anxious Appreciator Hermits') has decreased this week to 41% (compared with 47% last week). The proportion of 'Pragmatic Policy Supporters' has fallen by 1% to 20%, whilst the proportion who fall into the 'Life Goes On' segment increased to 38% (compared to 32% last week).

- Intention to visit a visitor attraction by the end of September has remained constant on 36% this week. Lead times remain shortest for visiting country parks or scenic areas, but longest for both aquariums and theme parks.
- This week there has been an overall decrease in the proportion who intend to visit a zoo (2% decrease) or go to an outdoor park or scenic area (6% decrease) by the end of September, however, intention to visit an indoor play centre (1% increase) or to visit a small historic house (2% increase) by the end of September have increased slightly this week, after dropping previously.
- Intention to take a UK holiday by the end of September has decreased for the third week in a row to 26% (compared with 27% last week). However, intention to do so by the end of December has increased by 3% this week, to 48%.
- After falling to its lowest figure yet last week, the proportion who intend to book hotel accommodation by the end of September has increased to 19% (compared with 16% last week – the lowest figure recorded yet). However, this is still much lower than the figure 2 weeks ago, perhaps because news is changing each day, meaning many may be choosing to book spontaneous last-minute trips rather than risk advance booking for a trip they are uncertain will go ahead.
- The proportion of those who intend to go on a shopping trip by the end of September has decreased to 45% this week (compared to 49% last week), however, actual levels of re-engagement have improved, with almost a third of 'Travel Activists' (people who actively engage in public transport/visitor attractions/hotels) stating that they have been on a shopping trip since the lifting of lockdown.
- The picture for the restaurant market has continued to improve this week, with 74% intending to visit a restaurant by the end of December (compared to 70% last week). Overall, 36% of the population have

visited a restaurant in August, bringing engagement up to around 40% of pre-COVID levels.

Main points from VisitBritain's Consumer Sentiment tracker include:

- The proportion who expect some sort of normality by the end of 2020 has increased slightly this week to 18% (compared to 15% last week). However, 60% of UK adults believe things will not return 'close to normal' before April next year.
- This week's 'appetite for risk' score stands at 2.6 out of 4, a marginal increase on last week's figure of 2.58. 'Appetite for risk' for all activities has remained constant this week, with the exception of 'eating at a restaurant' and 'shopping in your local shopping centre', which have each increased by 0.1.
- Confidence in the ability to take a trip between October and December has increased to 41% this week, after dropping to 38% last week. 51% are confident they will be able to take a trip from January 2021 onwards, a 1% increase on last week.
- '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 'restrictions on travel from government', which may be linked to fears over a second wave.
- 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 fourth week in a row, with 12% stating it as their preferred destination. 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.
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However, from October onwards, ‘city or large town’ is the most popular option, with 33% stating it as their preferred destination type.

Growth Platform

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