Latest Consumer research

Visit Wales weekly tourism consumer tracker with BVA BDRC

Visit Wales are working with VisitBritain and VisitScotland to extend the current BVA BDRC survey to focus on demand for holidays in the short-medium term.

Reports are published weekly on the VisitBritain website here. Wales-focused reports are published every 4 weeks on the Welsh Government website, and include data on Wales residents and UK residents intending to visit Wales.

Week 10 (20-24 July) UK-level findings:

Expectations of normality remain subdued with a minority (27%) expecting things returning to normal by end of year.

Level of comfort undertaking different daily activities rose but people remain more cautious about eating at a restaurant and travelling by public transport.

On balance, there are more people who think they will take fewer UK short breaks or holidays from now to the end of the year. A higher proportion (44%) now expect to take fewer overseas trips this year.

14% of UK adults confirm they have been on a trip since in July, equivalent to c. 8 million adult holidays.

Around one in ten people planning to take a holiday during the summer or winter are intending to visit Wales, with South West of England the most popular destination.

Caravan and camping remains the preferred type of accommodation for domestic summer holidays, followed by self-catering.

Weeks 5-8 (15 June – 10 July) Wales Residents and Wales Intenders (full report).

Key changes compared to Weeks 1-4:

- Comfort levels with 'everyday' leisure activity has increased significantly, particularly with 'shopping in your local shopping centre'.
- Confidence in taking U.K. holidays or short breaks in July, August and September is higher than in weeks 1 to 4 amongst U.K. and Wales residents.
- Concerns about catching COVID-19 and opportunities to eat/drink out are now the main reasons for lack of confidence in being able to take a UK holiday or break amongst U.K. residents, replacing 'government restrictions'.
- U.K. residents are still likely to take fewer U.K. holidays or short breaks compared to normal but this is the less the case than in weeks 1 to 4.
- Holiday bookings amongst intenders have increased significantly, but a majority are yet to book.

Welsh Government Survey of public views on the coronavirus (10-13 July summary)

- Perceptions of the threats posed by coronavirus are stable following some previous decline. It continues to be seen to pose a greater threat to the country than to individuals. A majority in Wales continue to follow social distancing guidance. The Welsh public continue to think the coronavirus pandemic will have a personal financial impact on them.

BVA BDRC: Tracking Consumer Sentiment on the Impact of COVID-19 GB consumer sample

Week 17 Report (23 July)

There was an increase in 'likelihood to purchase' following the announcement to cut VAT to 5% on tourist attractions and hospitality businesses

Intention to book a hotel stay remains steady, with 38% intending to do so by the end of the year. 1 in 3 who aren't planning a hotel stay in the next 6 months say they don't think staying in a hotel is yet safe.

Week 18 Report (29 July)

Fears of a second wave of the virus remain widespread with over eight in ten (81%) thinking it is very / fairly likely

The great outdoors continues to attract the lion's share of consumer leisure time, over two in five (43%) have visited an outdoor park or scenic area since permitted.

This compares with 13% of people who have been to a visitor attraction since permitted.

Just under one in five (18%) have been to a restaurant and a quarter (25%) have been to a shopping mall.

Public Health Wales: Public Engagement Survey on Health and Wellbeing (Week 14 report: 6 – 12 July)

- Representative sample of the Welsh population to explore health and wellbeing.

**This summary document was last updated on 29-07-2020*

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Latest Industry / Regional research

Hospitality: Scottish Tourism Alliance 2m vs 1m impact study (16-21 June) Based on surveys with Scottish businesses. STA : n=315 hotels / hotel groups, and n=394 restaurants / cafes, ASVA survey (n=210 attractions), SBPA survey (n=318 pubs), Wild Scotland survey with n=52 outdoor adventure operators.

- 85% of restaurants and 83% of hotels said their business would be financially unsustainable if trading with 2m distancing in place without any additional support beyond the next 2 months
- c. 13% of the pubs surveyed believed it to be financially viable to trade whilst adhering to 2m distancing rules. 82% believed it to be viable to trade with 1m distancing in place.
- 66% of outdoor adventure operator businesses said that operating with 2m distancing in place was not sustainable for their business for more than 2 months and without any additional support.

Airline Industry: IATA Outlook for the airline industry 2020-2021 (report 9 June) maps air travel demand / estimated recovery, financial impact, government aid.

Arts & Creative: Creative Industries Federation The Projected Economic Impact of COVID-19 on the UK Creative Industries Report (17 June) by Oxford Economics

- Estimates 1 in 5 creative jobs could be lost in 2020.

Attractions - Consumer: Association of Leisure Visitor Attractions (ALVA): Attractions Recovery Tracker Wave 4: 8-11 July, n=716

- Intention to visit an attraction as soon as it is possible is high, though unchanged since Wave 3, with half of those who visit attractions claiming they will do this, or have done so already. Those who visit attractions most often show the highest intention to visit.
- There appears to still be a level of caution around visiting indoor attractions, and concern in using public transport to reach visitor attractions.
- There remains concern around other visitors, with 24% spontaneously mentioning social distancing in the context of visiting attractions. This has decreased slightly from 28% in the June 9-12 wave.

Attractions - Industry: Welsh Association of Visitor Attractions (WAVA) Attractions 17 – 26 May, (sample= 50 Welsh tourist attractions)

- Almost 4 out of 5 attractions would be able to open with 2 weeks' notice. Two thirds think they will be able to comply with social distancing. Almost 9 out of 10 think they will be allowed to open by September 2020.
- Almost 7 in 10 said that if they could operate at a maximum of 50% their capacity, they would choose to open, and 3 in 10 would remain closed.

Local communities: Centre for Towns: The effect of the COVID-19 pandemic on our towns and cities report

- Small and medium sized towns are disproportionally affected by COVID-19 related shut downs (accommodation, non-food retail, pubs/restaurants, and arts & leisure), as are coastal towns.
- On average, more than a quarter of all employed people in coastal towns in England and Wales work in sectors which are not able to trade due to lockdown.
- Many coastal and ex-industrial towns are further disadvantaged, as already experiencing economic difficulties makes coping with the impacts of COVID-19 harder.

Regional Business: Clwydian Range Tourism Group – COVID-19 Tourism Impact Survey 90 responses to an online survey 24 April – 22 May, distributed to CRTG members, via social media and other local businesses across Denbighshire, Flintshire, and Wrexham.

- Cashflow loss was cited by the majority of businesses as having had the biggest impact. The majority of businesses said their insurance did not cover them for COVID-related losses.
- The majority of accommodation and activity providers reported a 'severely reduced or total loss of cashflow'. "Rebuilding a reliable client base" was the most cited long-term concern – mentioned by almost a quarter. Most still had bookings for late summer / autumn.

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Economic information resources

The Office for National Statistics (ONS) updates various data resources regularly:

Daily Coronavirus (COVID-19) roundup

- A summary of coronavirus data and analysis produced by the ONS, updated daily, and containing links to each publication or data source

Coronavirus and the economic impacts on the UK

- Based on a new voluntary fortnightly survey, looking at the impact of COVID-19 on businesses

GDP monthly estimate, UK

- Gross domestic product estimates for the UK

Coronavirus and the latest indicators for the UK economy and society

- Experimental data using a variety of data sources to produce fast indicators

Coronavirus and the social impacts on Great Britain

- Using the Opinions and Lifestyle Survey to analyse COVID-19 impacts on people, households and communities.

Retail sales

- Retail sales estimates, with quantities bought and the amount spent on various categories and for retail and online.

Consumer price inflation, UK

- Price indices for the different measures of consumer price inflation.

Labour market review

- Estimates of employment, unemployment and economic inactivity

Other resources:

- Resolution Foundation regularly publish reports looking at the impact of coronavirus on the UK economy:
  - **The effects of the coronavirus on workers (report 16 May)**
  - **Summer Economic Update July 2020 overnight analysis (report 9 July)**
  - **The Living Standards Audit 2020 (report 21 July)**
  - **Time with the kids: How parents' time use has changed during the pandemic (report 13 July)**

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