

Study on how COVID-19 is impacting UK consumer attitudes to holidays and short breaks, and how this is likely to impact our industry

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Background

The NCC has commissioned a NEW study to track how consumer attitudes are changing towards UK holidays and short breaks as a direct result of the coronavirus

The quantitative tracking study assesses over 2000 adults (weighted to be nationally representative) in each 'wave' of the study, sampled at regular intervals.

It covers a wide range of thought-provoking questions that impact the industry including:

- ▶ How consumers holiday and short break plans have been impacted so far?
- ▶ Whether consumers will still attend sports events, festivals, shows and other mass gatherings in the first few months after lockdown?
- ▶ If consumers have the appetite to return to holidaying after the lockdown restrictions, in the same numbers?
- ▶ How socially acceptable consumers perceive holidays and short breaks in leisure vehicles and holiday parks, in the first few months after lockdown ends?
- ▶ What activities are most looked forward to after the lockdown?

The results below are the first wave of a series of research waves to take a regular check on the changing UK consumer attitudes and intentions as the COVID-19 story unfolds.

Each wave will reflect an increasing consumer awareness about the social and economic steps the country will be taking towards recovery. The findings will reveal how their views are changing, and how this impacts the UK leisure industry

How the study was undertaken

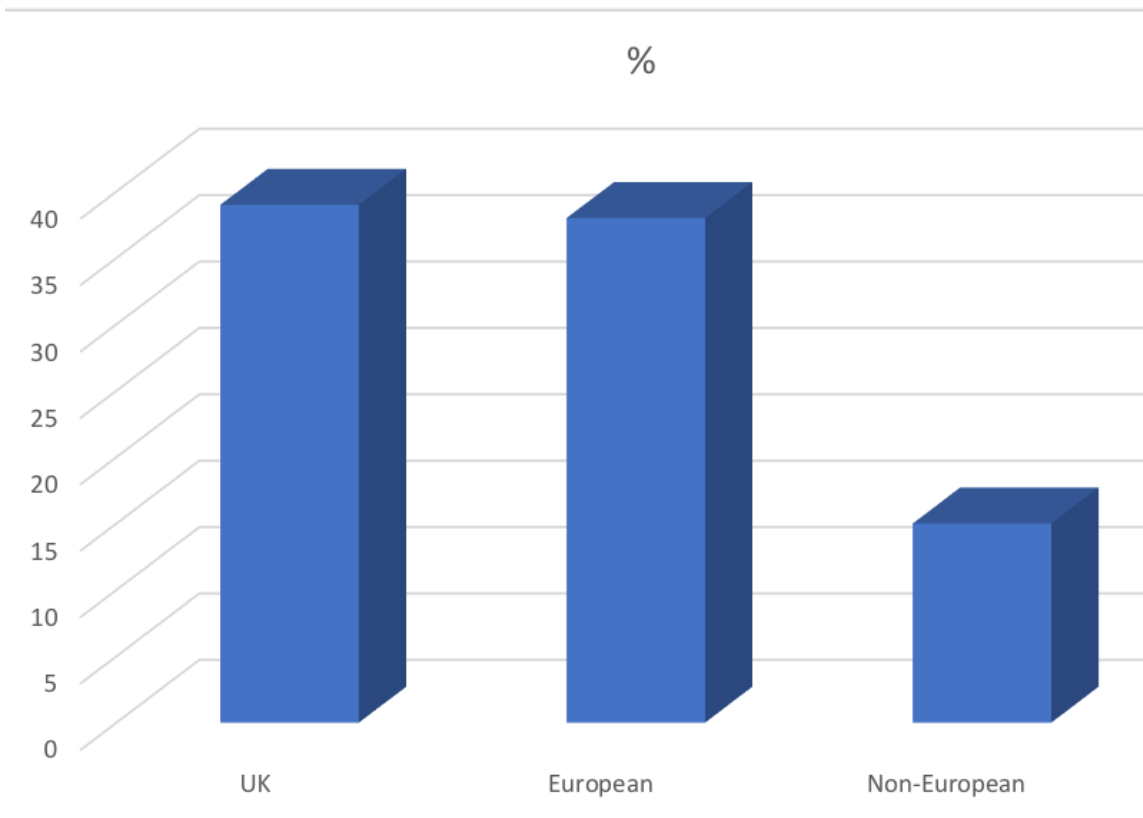
The NCC has teamed up with Populus* who run polls on a range of topical issues including COVID-19.

Populus interviewed a random sample of 2,050 adults online between 22 April and 23 April 2020. Interviews were conducted across the UK and the results have been weighted to be representative of all UK adults.

Very large numbers of UK consumers claim they have already had experience of leisure vehicles and holiday caravan holidays

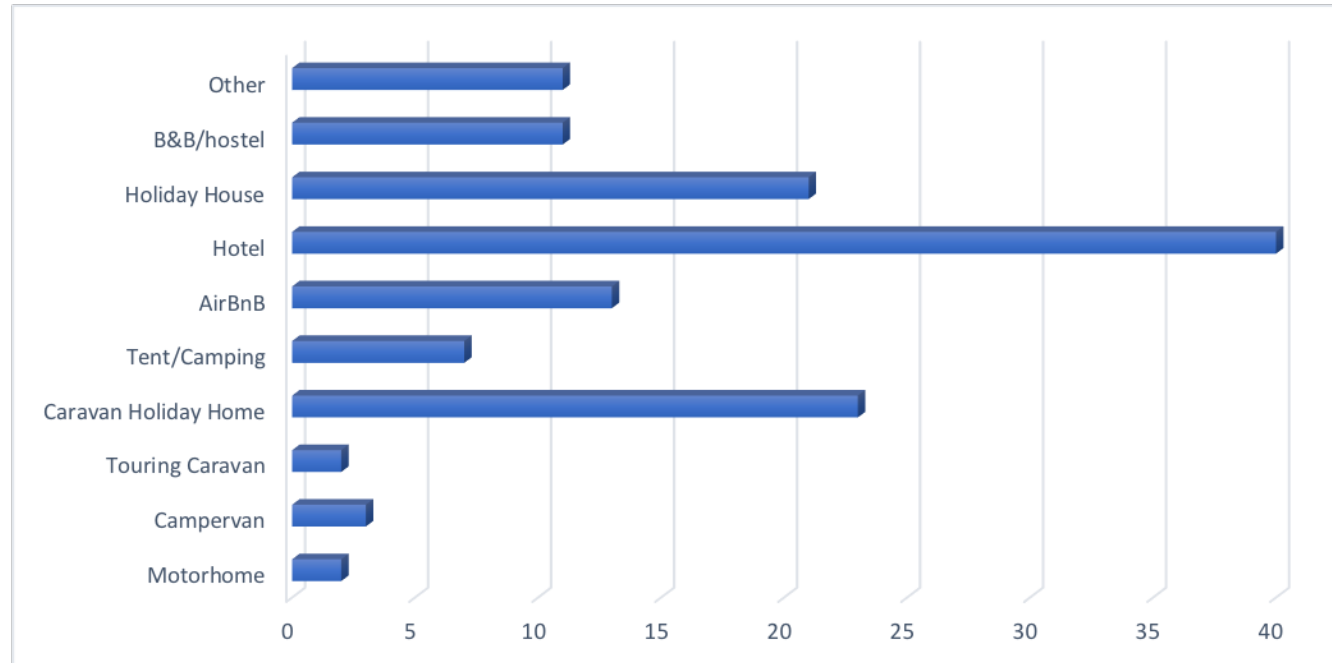
- ▶ Just under half of UK adults (an est. 22 million of 50 million) claim they have 'ever' had experience or use of a leisure vehicles or holiday caravans
- ▶ The majority (65%) of these adults are over 45 years old, but, perhaps more surprisingly, an additional but significant 13% are slightly younger at 35-44

Before the COVID-19 lockdown, the vast majority of consumers say they had holidays planned



- ▶ 70% of UK adults (est. 35 million) claimed they were planning holidays or short breaks in the following 12 months from March 2020*. (*This is derived from total UK adults = 49.8 million, less 15.1 million adults not planning any trips.)
- ▶ 39% of all UK adults stated they planned UK holidays or short breaks (equivalent to 56% of the total consumers planning a trip anywhere and an est. 19.4 million UK adults). They are well represented across all age groups with 54% being over 45, and 46% below

Of pre COVID-19 UK planned holidays and short breaks, almost 1 in 3 say they were leisure vehicle or caravan holiday home based

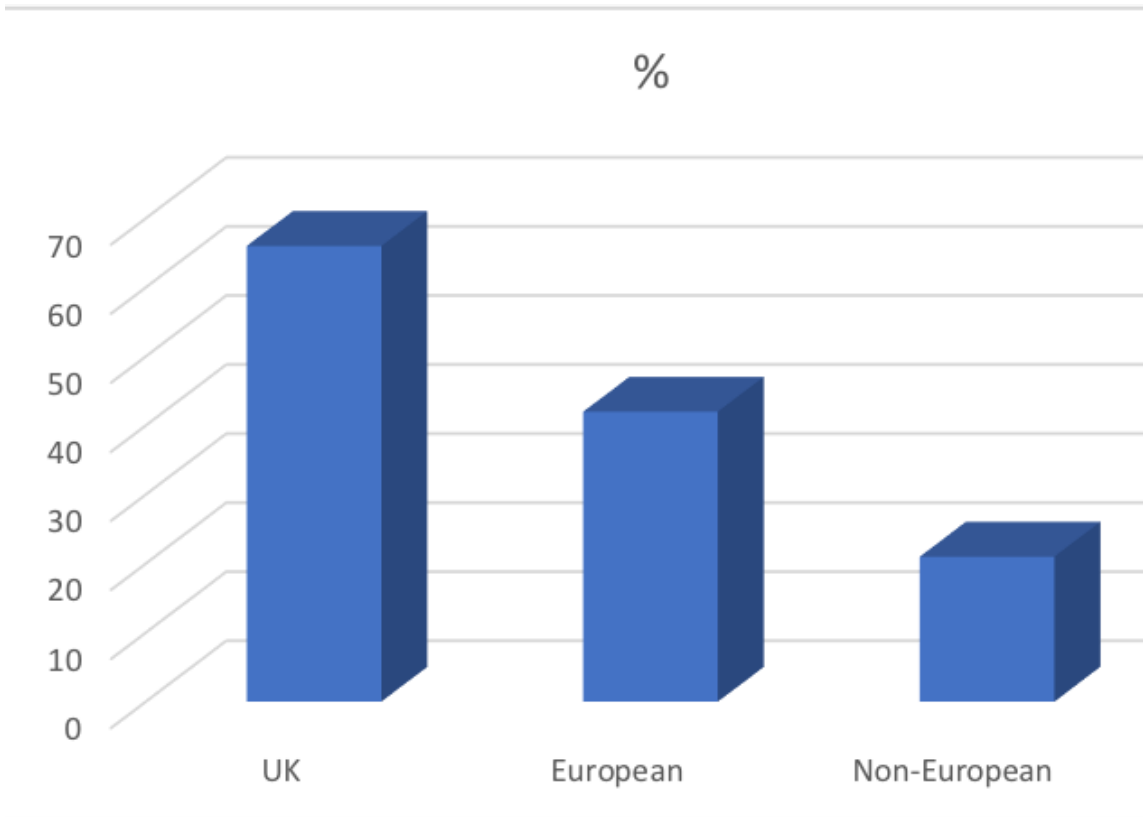


- ▶ 28% of consumers pre COVID-19, claimed their UK based holidays and short breaks planned, were based on leisure vehicles and holiday caravans, with holiday caravans accounting for a massive 80% of these

The vast majority of consumers claim their UK holidays and short breaks have been 'impacted' by COVID-19 - meaning cancelled, postponed, prevented or disrupted

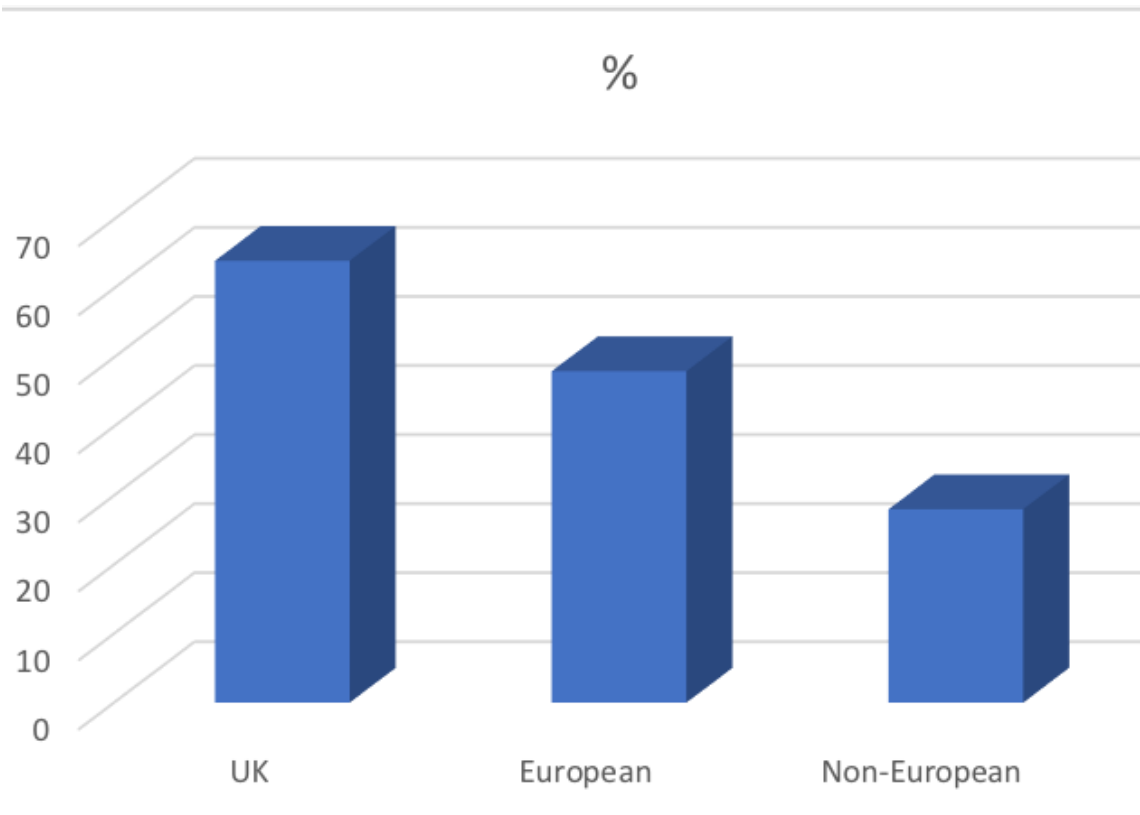
- ▶ A significant 79% of consumers say their UK holidays or short breaks planned before 1 August have been impacted by COVID-19. 26% of consumers say they were based on holiday caravans or leisure vehicles

The majority who had UK holidays impacted by COVID-19, claim they are likely to plan a holiday or short break in the second half of the year, if restrictions are lifted by the summer



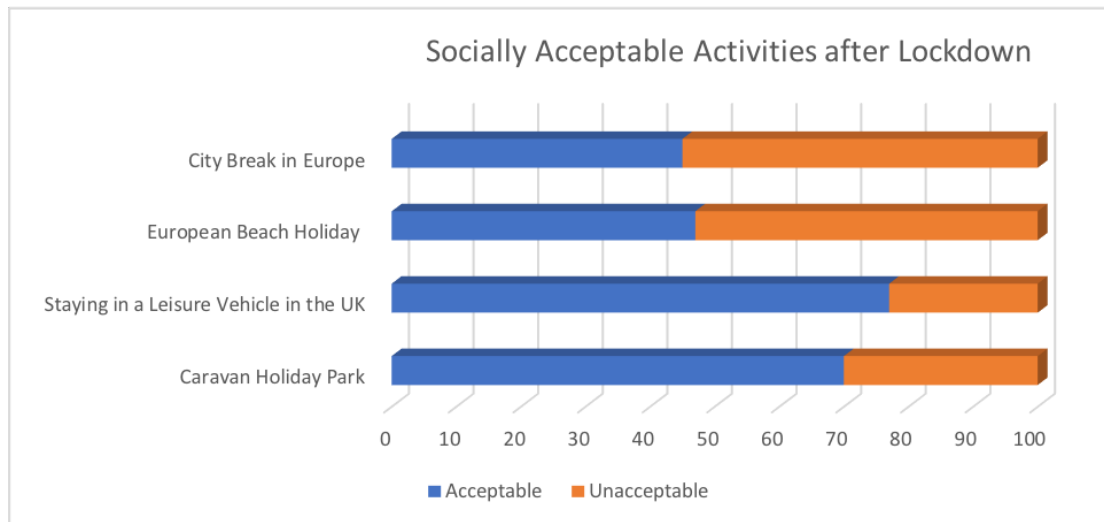
- ▶ 66% of consumers who had holidays in the UK impacted pre-summer by COVID-19 say they are **LIKELY** to take UK holidays or short breaks between summer and December 2020, provided the restrictions are lifted by summer
- ▶ This is a substantially higher proportion for those impacted in taking UK holidays, than it is for trips abroad. Of European trips planned before summer, 42% are likely to take European trips summer to December, and of Non-European planned trips before summer, only 21% are likely to take Non-European trips summer to December

Looking to 2021 holiday plans, there are significant numbers stating likelihood to take trips in 2021 assuming restrictions are lifted, as well as a shift in attitude towards the UK as a destination compared to pre-COVID-19



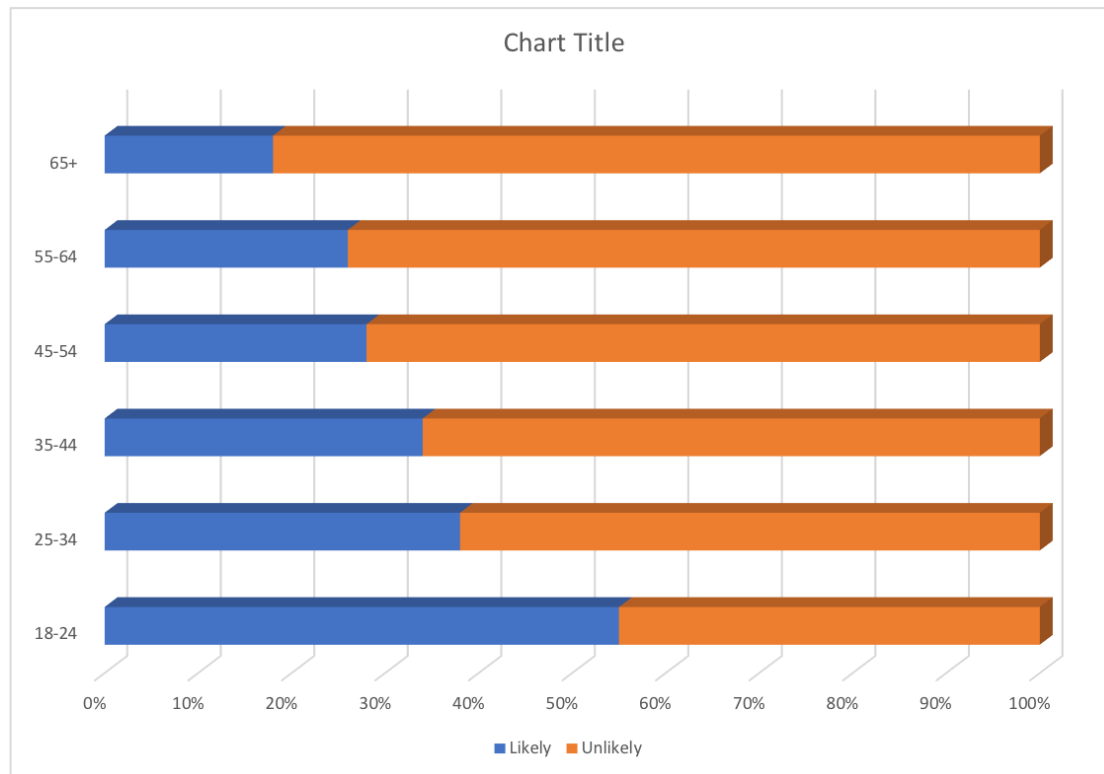
- ▶ 64% of UK adults say they are 'Likely' to take a UK holiday or short break in 2021, provided the restrictions have been lifted. We will monitor this closely as further waves of this study are conducted
- ▶ Note of caution - 64% is a potential increase from pre-COVID-19 consumer numbers 'planning' to take trips in the UK (38%), but this 'intent' has yet to be converted!
- ▶ There is also a shift of UK adults towards the UK as a destination, post COVID-19, which are 23% higher for 2021 than the equivalent figure for consumers likely to take non-UK trips, which have declined. Pre-COVID-19 consumer numbers planning trips in the UK were 17% lower than non-UK trips, but for 2021 UK trips are the greater share of consumers interest.

Caravan holiday home and leisure vehicle holidays in the UK ARE seen as socially acceptable activities after the restrictions are lifted, by the vast majority of UK adults:



- ▶ 70% of UK adults have said they perceive a Holiday Caravan type holiday in the UK as socially acceptable, even in the first 6 months after the restrictions are lifted. The equivalent figure for a Motorhome type holiday in the UK is even higher at 77%, indicating a general social acceptability of these types of holiday immediately following lockdown restrictions being lifted.
- ▶ This is much less the case for a holiday trip to a major European City (45%), or a European beach holiday (47%)

Most UK adults are unlikely to attend mass gathering events in the first 6 months after restrictions are lifted



- ▶ 69% responded as unlikely to attend a mass gathering event like sports, shows or concerts in the first 6 months after restrictions are lifted
- ▶ The attitude towards this is significantly impacted by age, with older consumers being far less likely to attend these types of events, for example 82% of 65+ age groups claim to be unlikely to attend mass gatherings

The vast majority of UK adults are most looking forward to one of 3 activities after the restrictions are lifted!

- ▶ 82% of UK adults selected one of these 3 activities, as something they most looked forward to:
 - ▶ Spending time 'in person' with friends and family
 - ▶ The freedom to go out without thinking about it
 - ▶ Going on holidays or short breaks

Summary

- ▶ Large numbers of UK adults have already had experience of holiday caravan or leisure vehicle activities - just under half of all adults!
- ▶ The vast majority (70%) of UK adults have had their holiday or short break plans adversely impacted by COVID-19
- ▶ The majority who had UK plans disrupted up to summer 2020, claim they are 'likely' to plan a summer to December UK trip, if restrictions are lifted
- ▶ Similar numbers of UK adults say they are likely to take a UK holiday or short break in the UK in 2021, if restrictions are lifted, suggesting that consumer demand is still strong - this needs careful tracking in future waves of this study
- ▶ There is a potential attitudinal shift towards UK based holiday plans in 2021 which we also need to track closely over future waves of this study
- ▶ Importantly, leisure vehicle and holiday caravan holidays ARE seen as socially acceptable by the majority of general UK consumers, once restrictions are lifted
- ▶ Holidays and short breaks are among the top 3 activities most looked forward to by consumers after the restrictions end