The Covid-19 Tourism Recovery Consumer Survey

Nottingham & Nottinghamshire

Method Statement:

This survey was conducted by **Visit Nottinghamshire.** The indicators and analysis presented are based on responses from consumers signed up to the Visit Nottinghamshire 35,000 strong consumer database and various social media channels. Capturing responses on how Covid19 will influence consumer confidence in relation to day trips/ holidays/future travel. It also looks at what measures would re-assure and encourage visitors back to the region.

The survey will form part of the wider D2N2 Visitor Economy Recovery Plan and will also be fed into all local and district councils, VisitBritain, and all associated Partners and Stakeholders.

The survey ran from the 15th – 19thth June 2020 and received 838 responses.

Brief summary of results:

69.5% of respondents have expressed that they will look for holiday destinations where they can safely maintain social distancing.

63% of respondents would feel reassured with a ‘standard mark’ that signals a business has been recognised as following all government guidelines.

The most common (**65%** of respondents) reassuring measure for consumer confidence after attractions have reopened is having hand sanitiser available at the entrance of each business.

48% of respondents have stated that as soon as lockdown measures end they would feel comfortable visiting local attractions.

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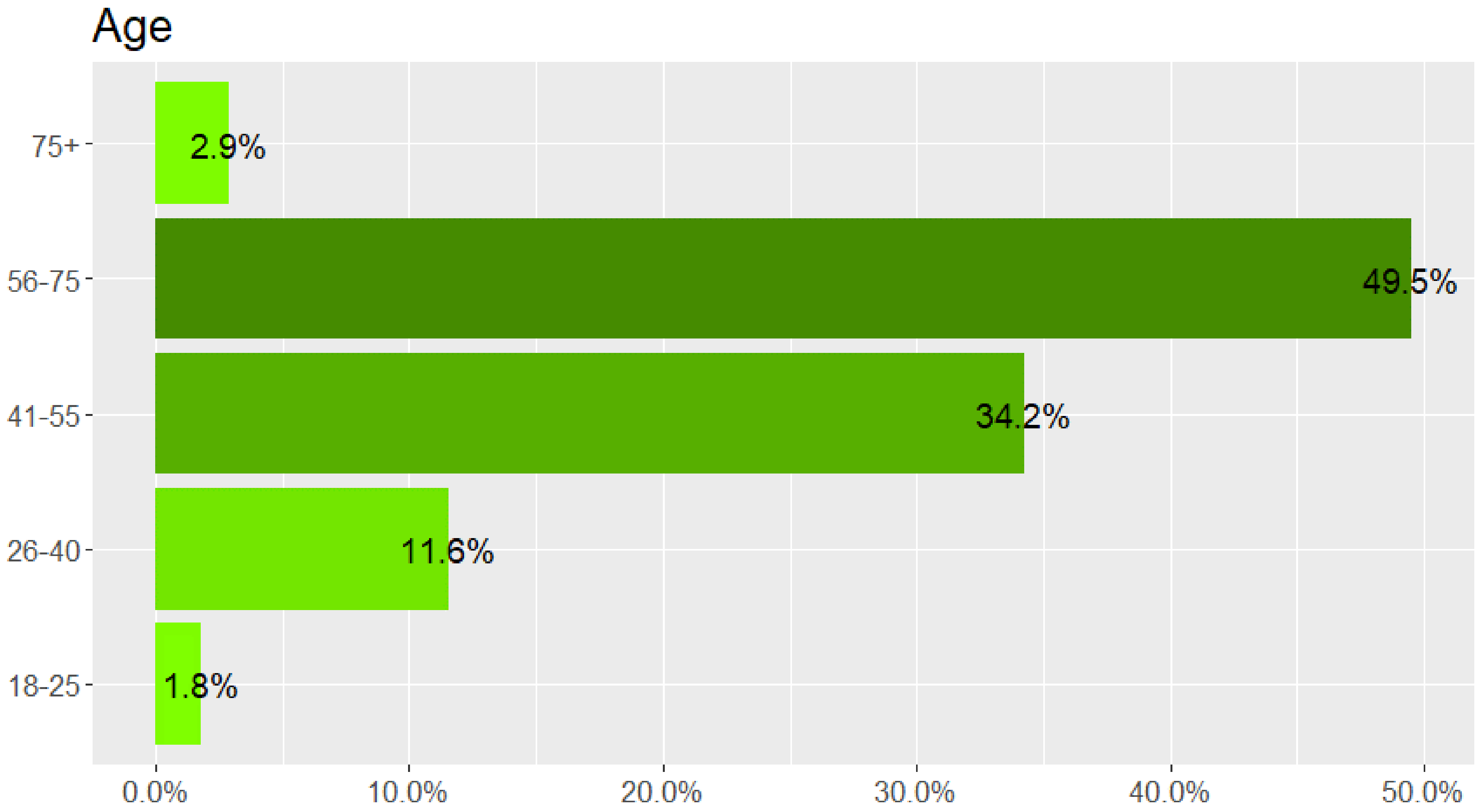

While this is not explicitly mentioned throughout the survey, it is worth acknowledging 52.4% of respondents are over the age of 56.

Conversely, the underrepresentation of 18-25 year-olds in the survey (1.8%) should be highlighted if ever comparing the results of this survey with another region. Not only is this age demographic presumably less at risk of Covid-19, but the questions on activities the respondent is looking forward to in the future may correlate to the age of the respondents rather than Covid-19 concerns. (Specifically the cycling/gym responses that state they would never have participated in these activities before/after Covid-19)

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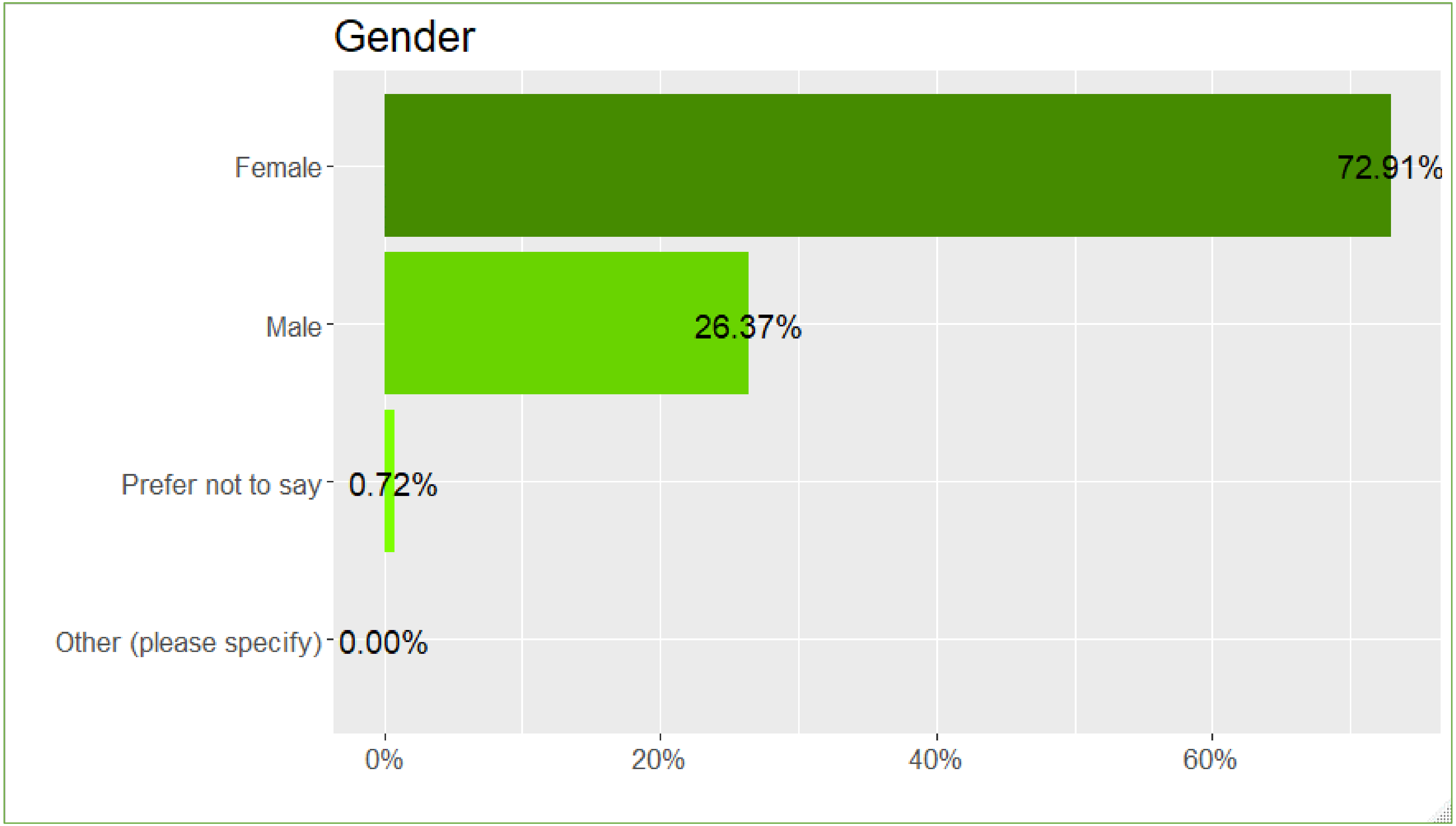

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Strong majority of the respondents are Female (72.91%)

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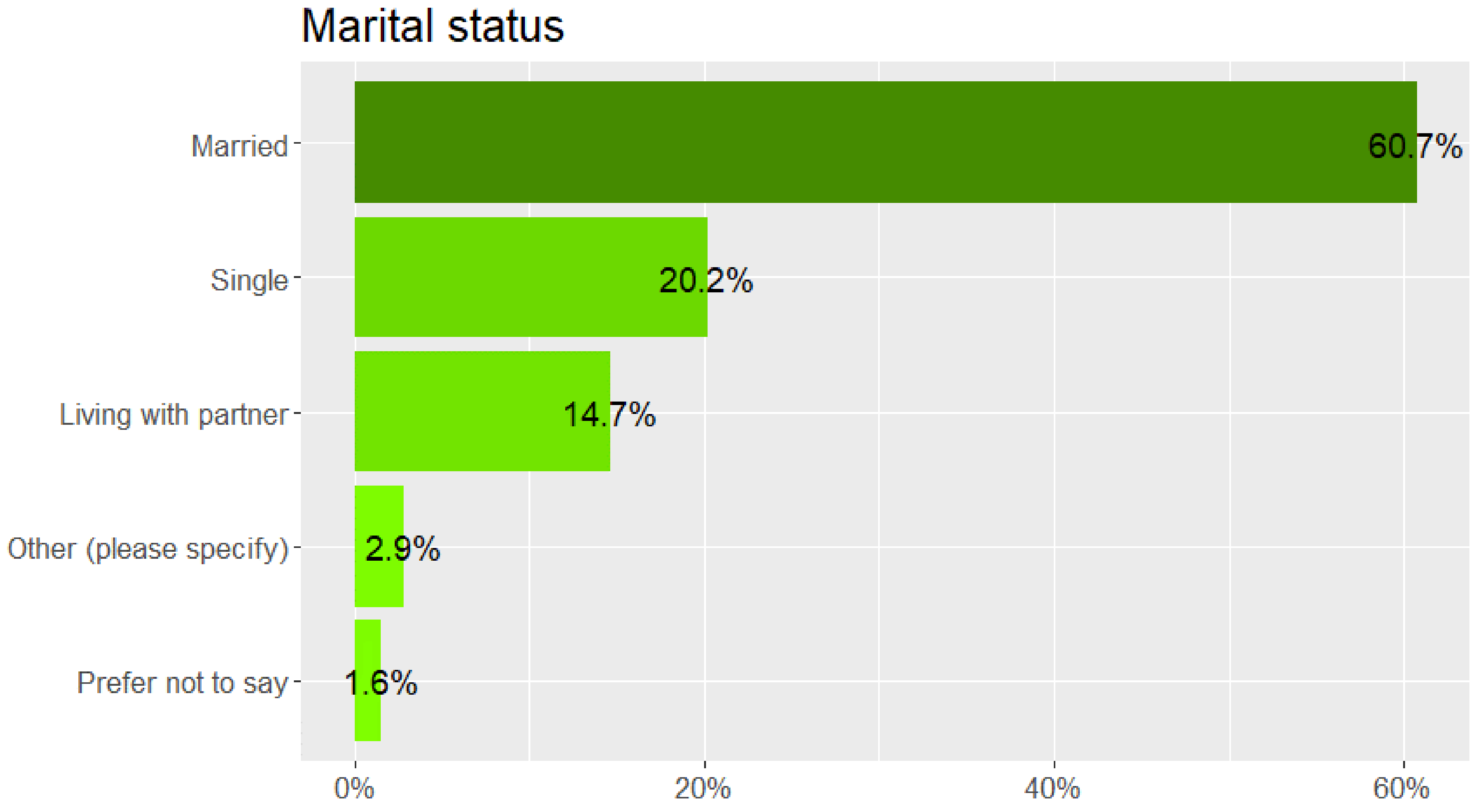

The majority of "Other" responses are individuals in a relationship but are not living together (a couple of respondents citing Covid-19 as a reason for separated living conditions).

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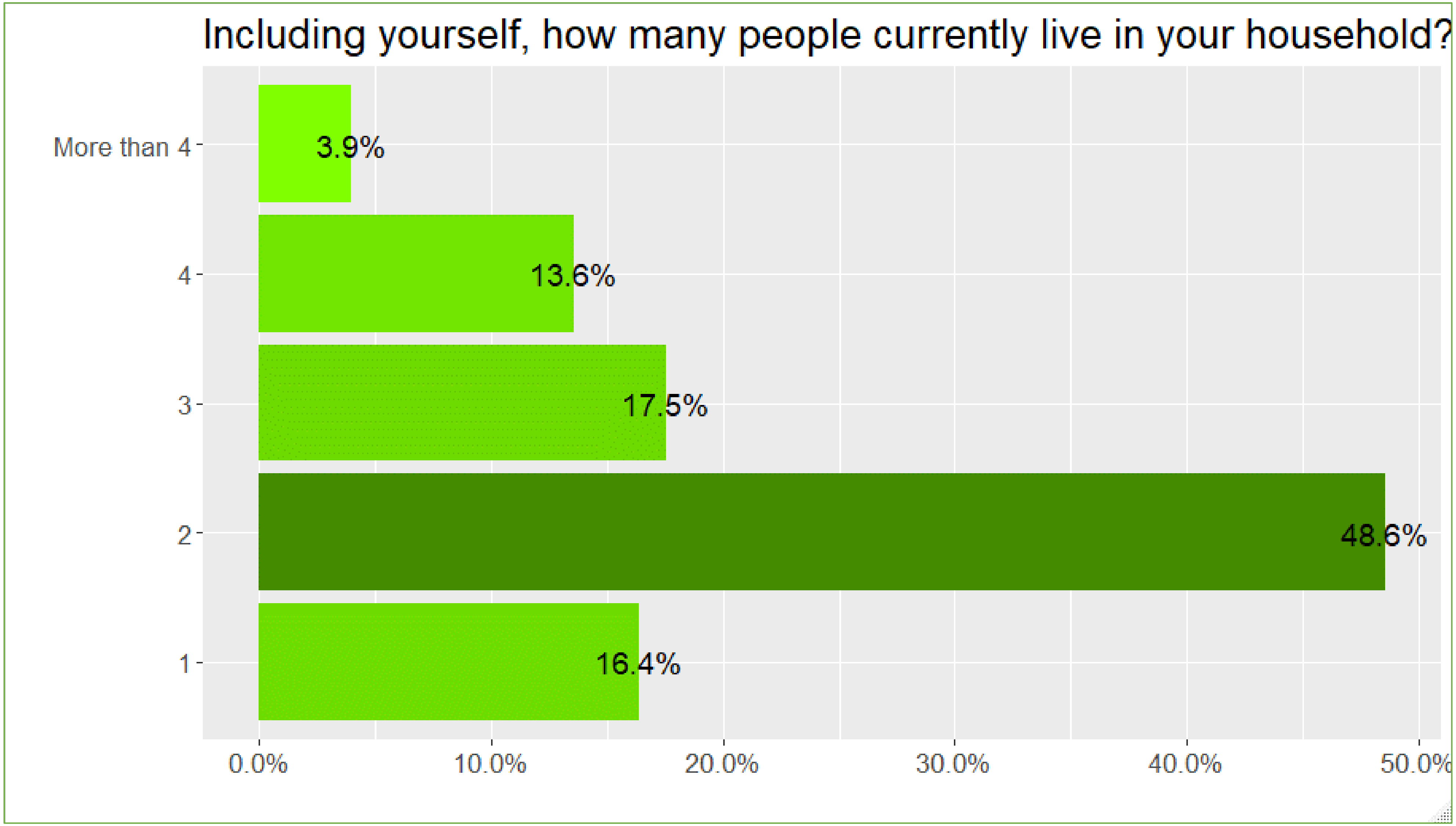

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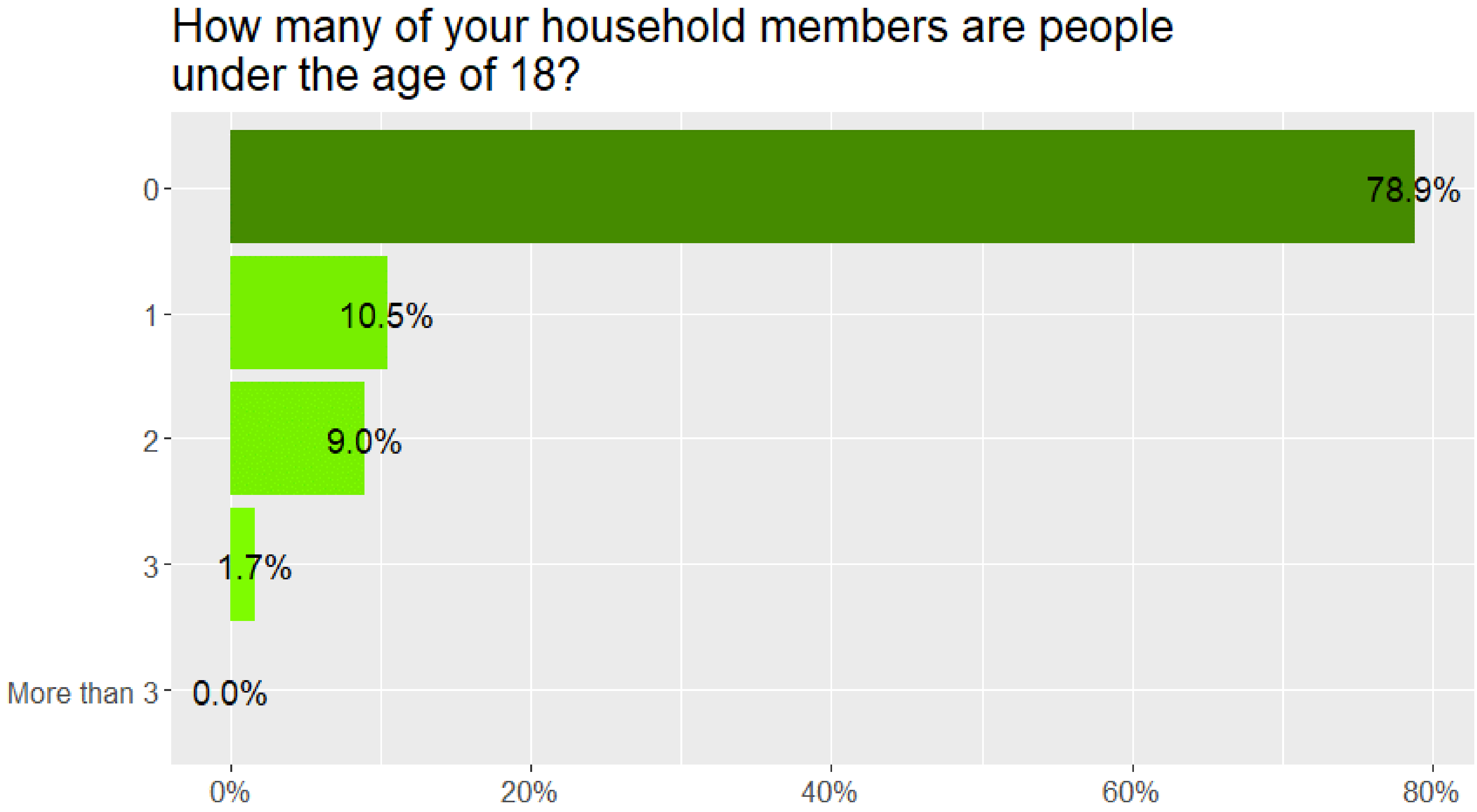
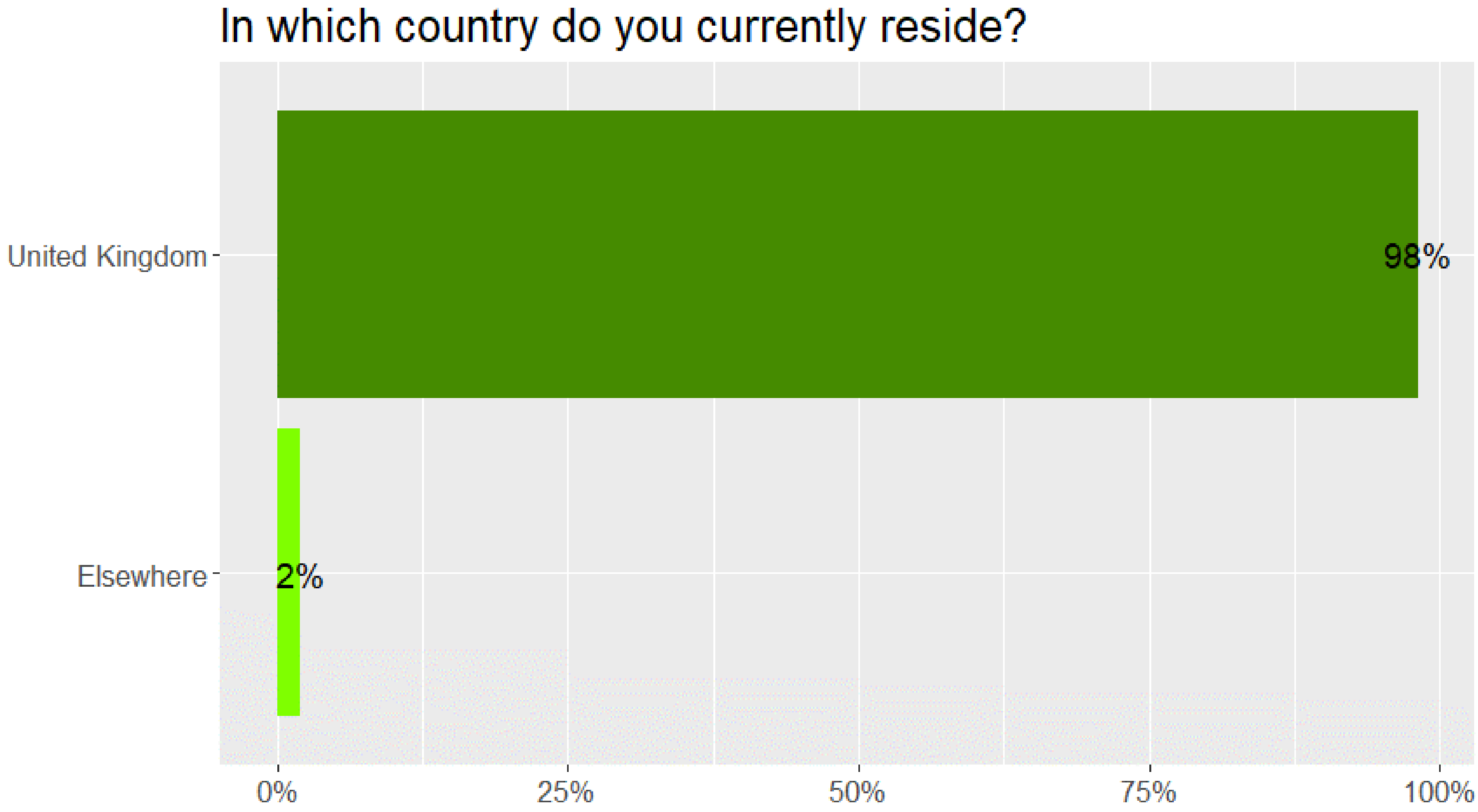
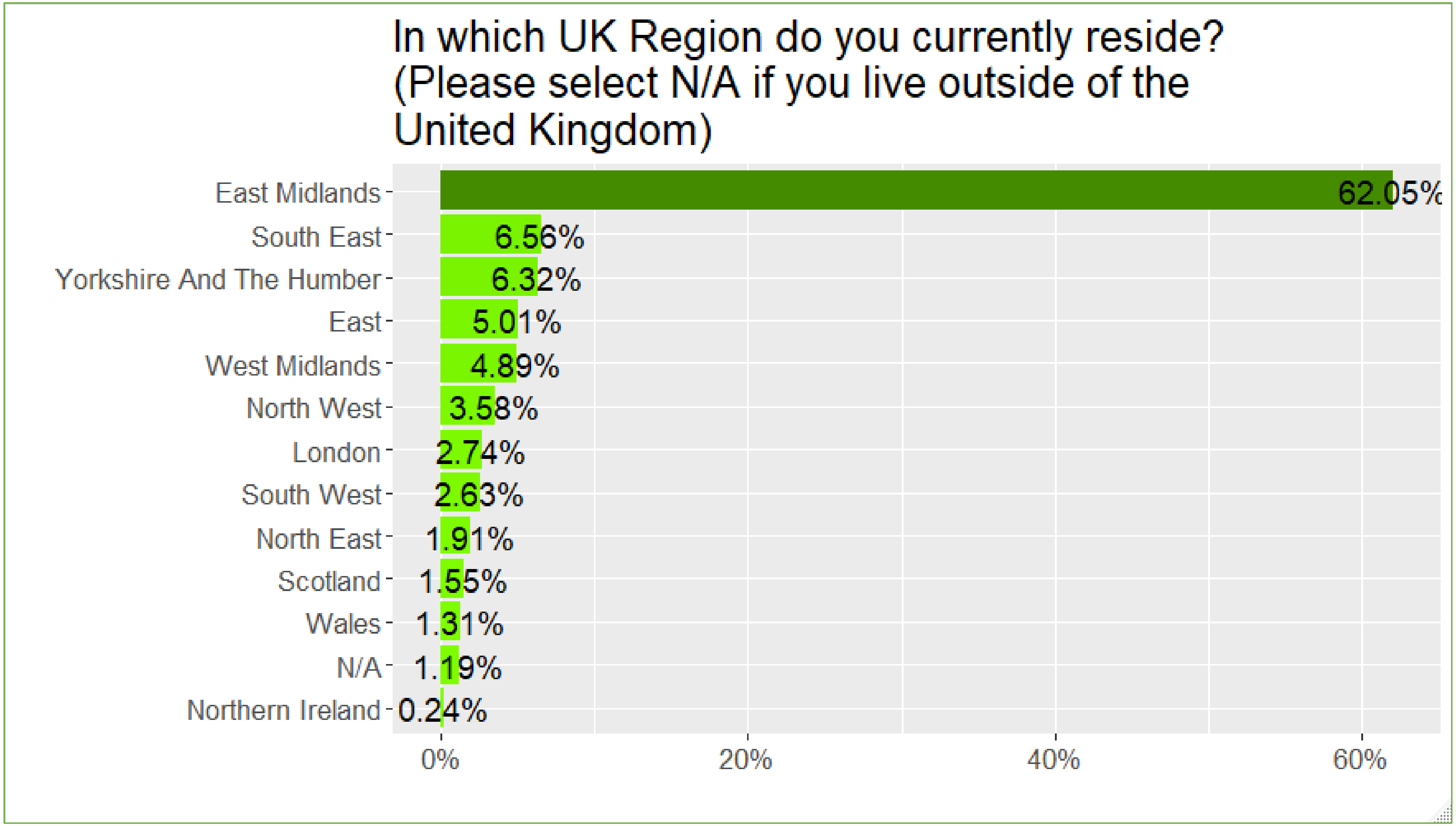


Majority of respondents (78.9%) do not have any individuals under the age of 18 in their household.



Of the "Elsewhere" respondents:

- 5 from the United states,
- 3 from the Republic of Ireland
- 2 from Spain
- 1 from the UAE,
  Switzerland
  Netherlands
  Japan
  Australia
  Angola



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37.95% of respondents **are not** from the East Midlands

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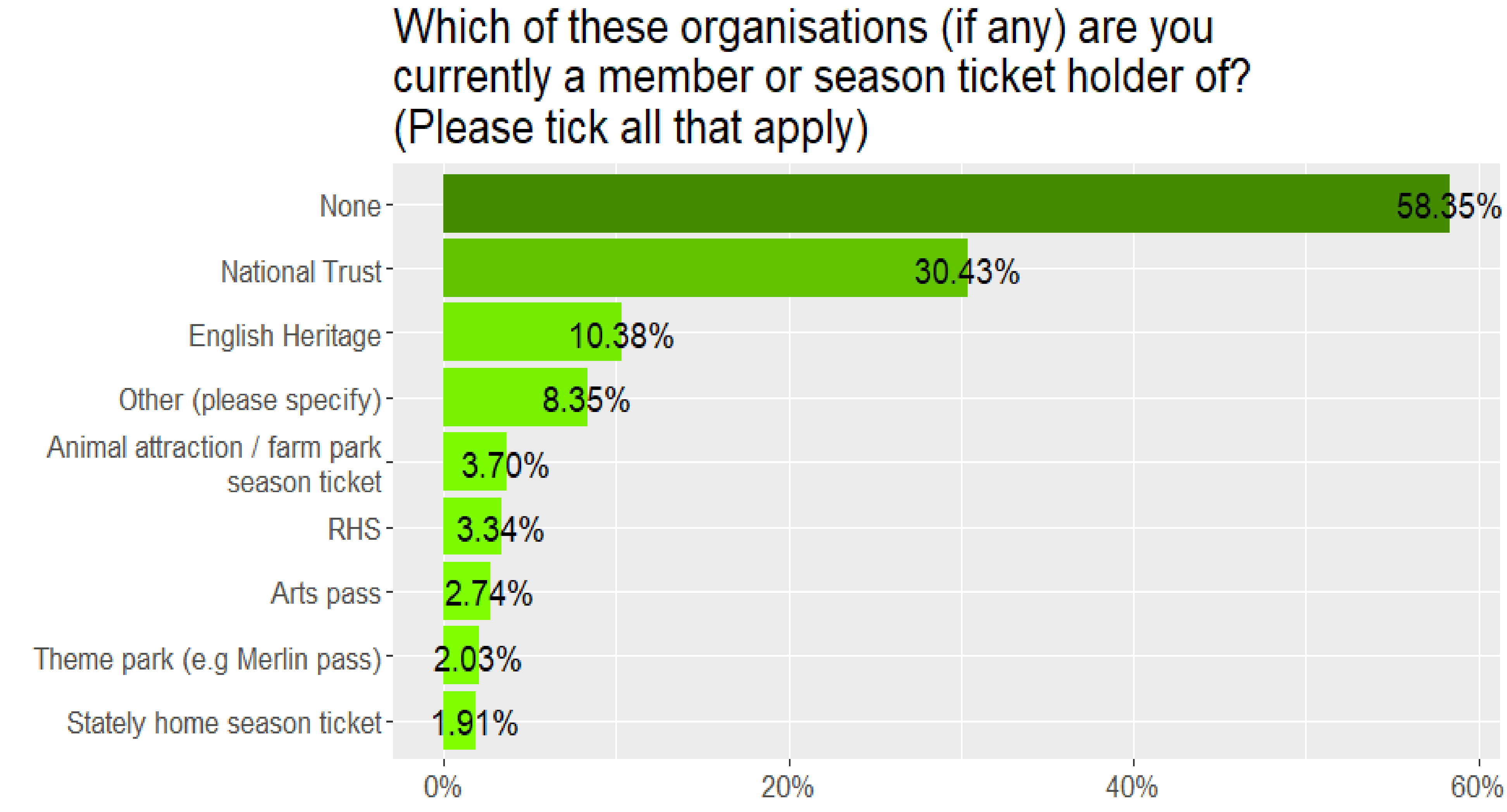
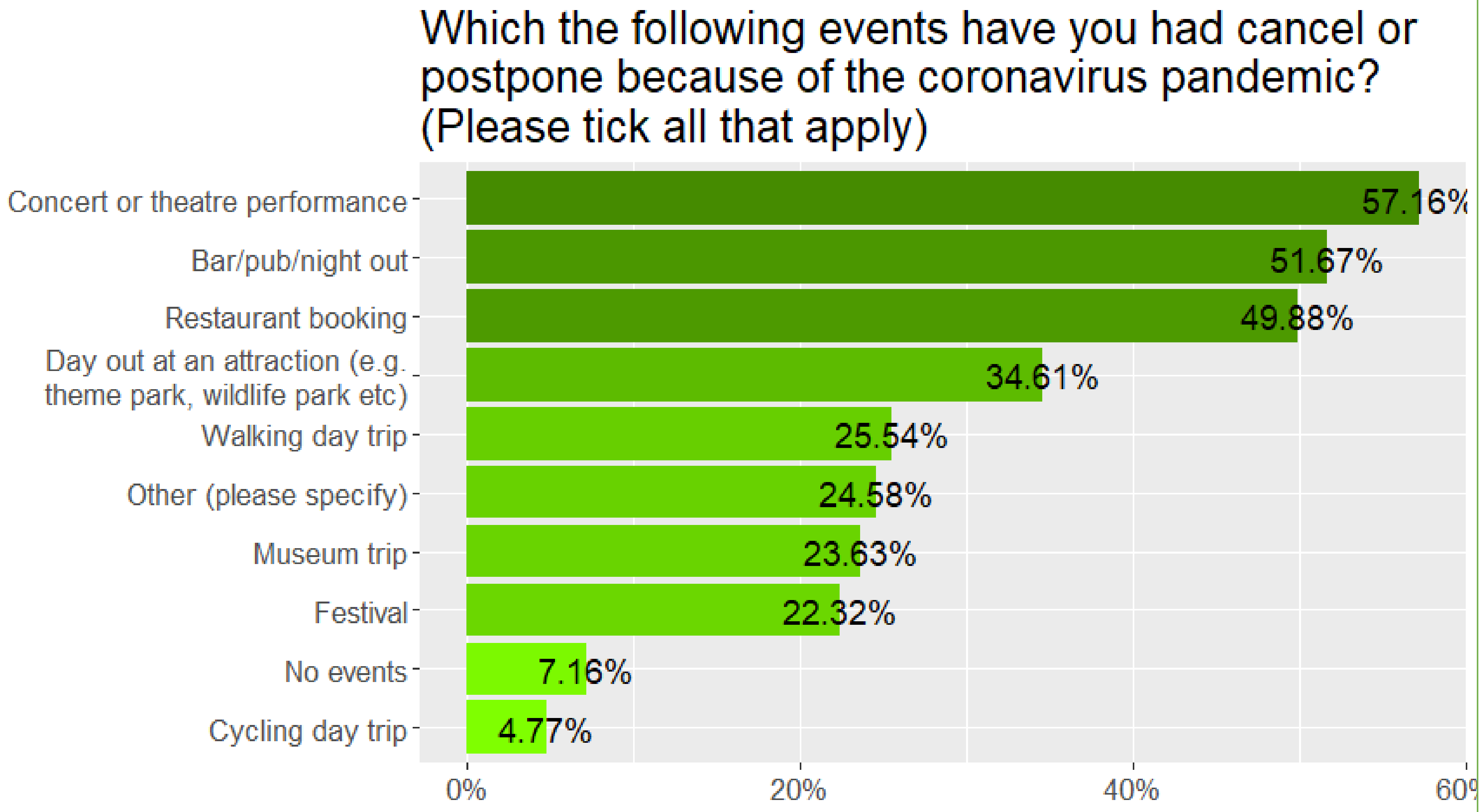


Of the "Other":

- 15 (1.4% total). responses for the Royal Society for the Protection of Birds (RSPB).
- 2 Sports organisations (Nottingham Forest/Nottinghamshire County Cricket Club)
- Miscellaneous arts:
  3 Nottingham Playhouse passes

  1 British Museum

  1 Historic houses



Only 7.16% of respondents did not have to cancel any events.

Of the "other":

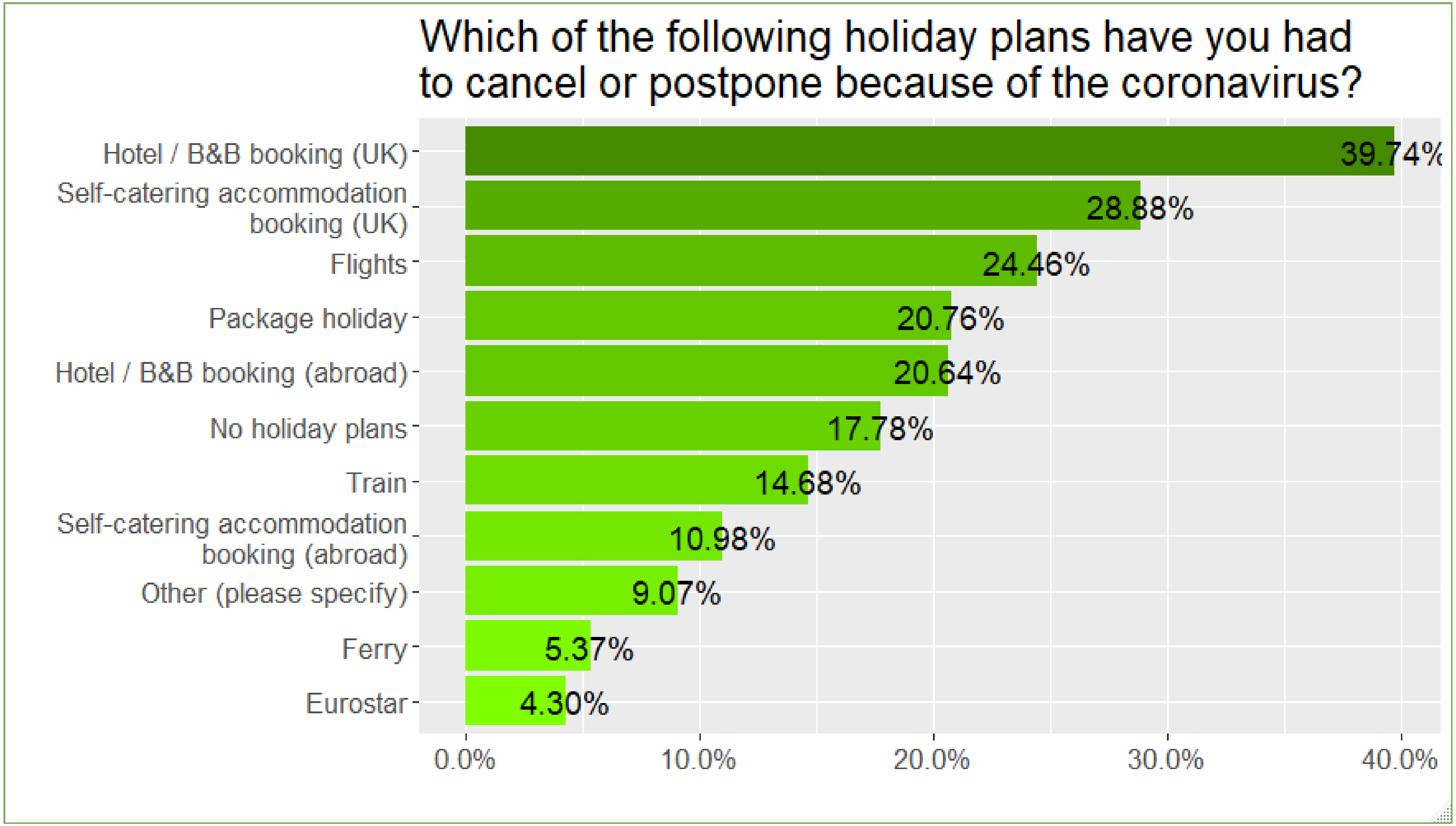
80% of these respondents simply state 'holiday' (approximately 20%of the total population)

Of the remainder, 3 respondents mention a tennis tournament cancellation (possibly Nature Valley Open?)

The rest are miscellaneous:

'bell ringing outing'

'local music scene'



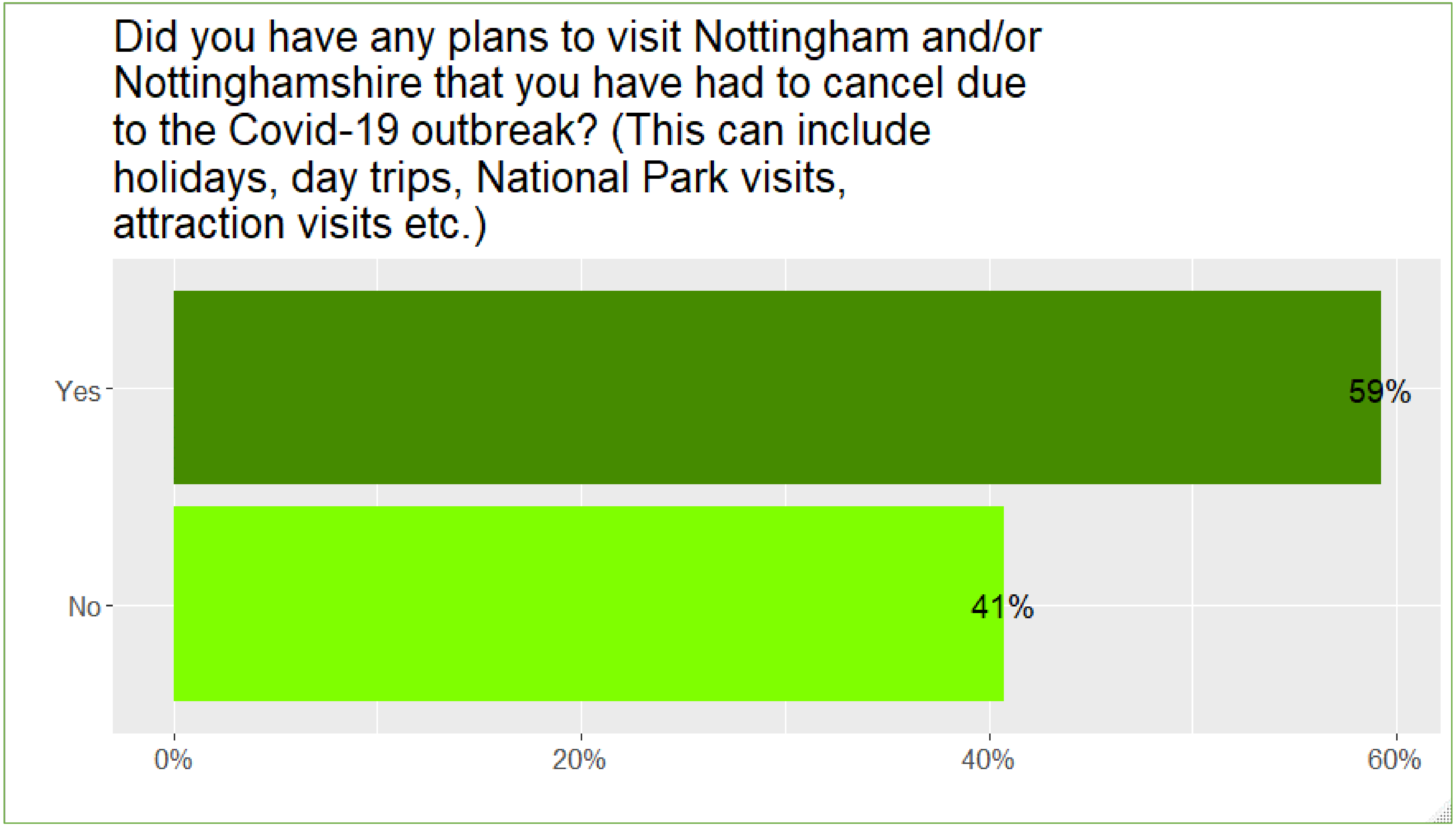
The combined total % of cancellations which could include accommodation is 121%, whilst postponements/ cancellations which include transport is only 69.5%.

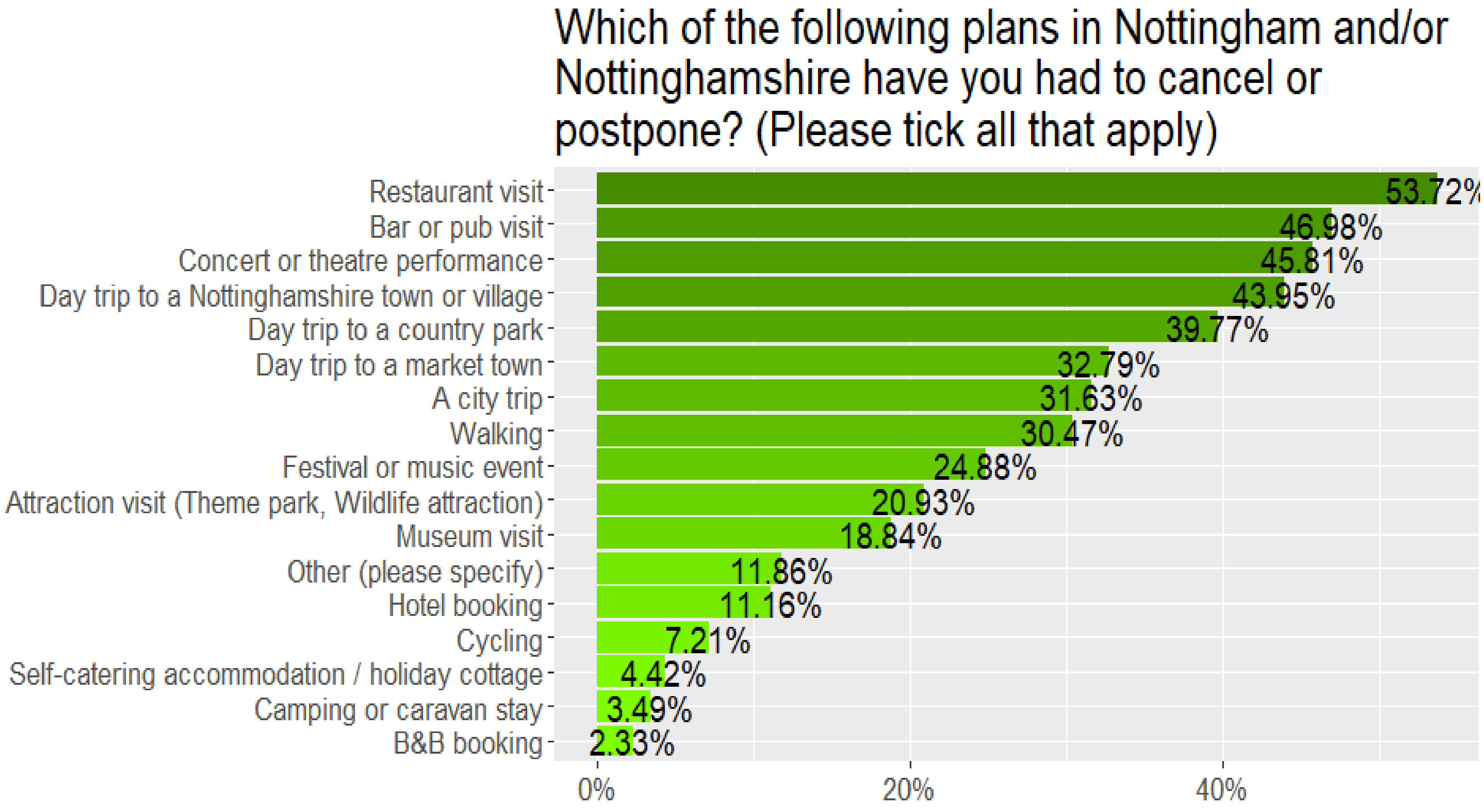
Of the “other” responses:

50% cruise (roughly 4.5% total)

45% caravan/camping (approximately 4% total)

The remainder of other responses are cancelled day trips to other cities in the UK (visiting partners)


Did you have any plans to visit Nottingham and/or Nottinghamshire that you have had to cancel due to the Covid-19 outbreak? (This can include holidays, day trips, National Park visits, attraction visits etc.)
Yes
59%
No
41%
0%
20%
40%
60%



Note that the only response that was a majority of respondents was restaurant visit cancellations.

Unlike the previous question about **any** theatre/concert cancellation (57%), 45.81% of respondents say that they've had a cancellation within Nottinghamshire.

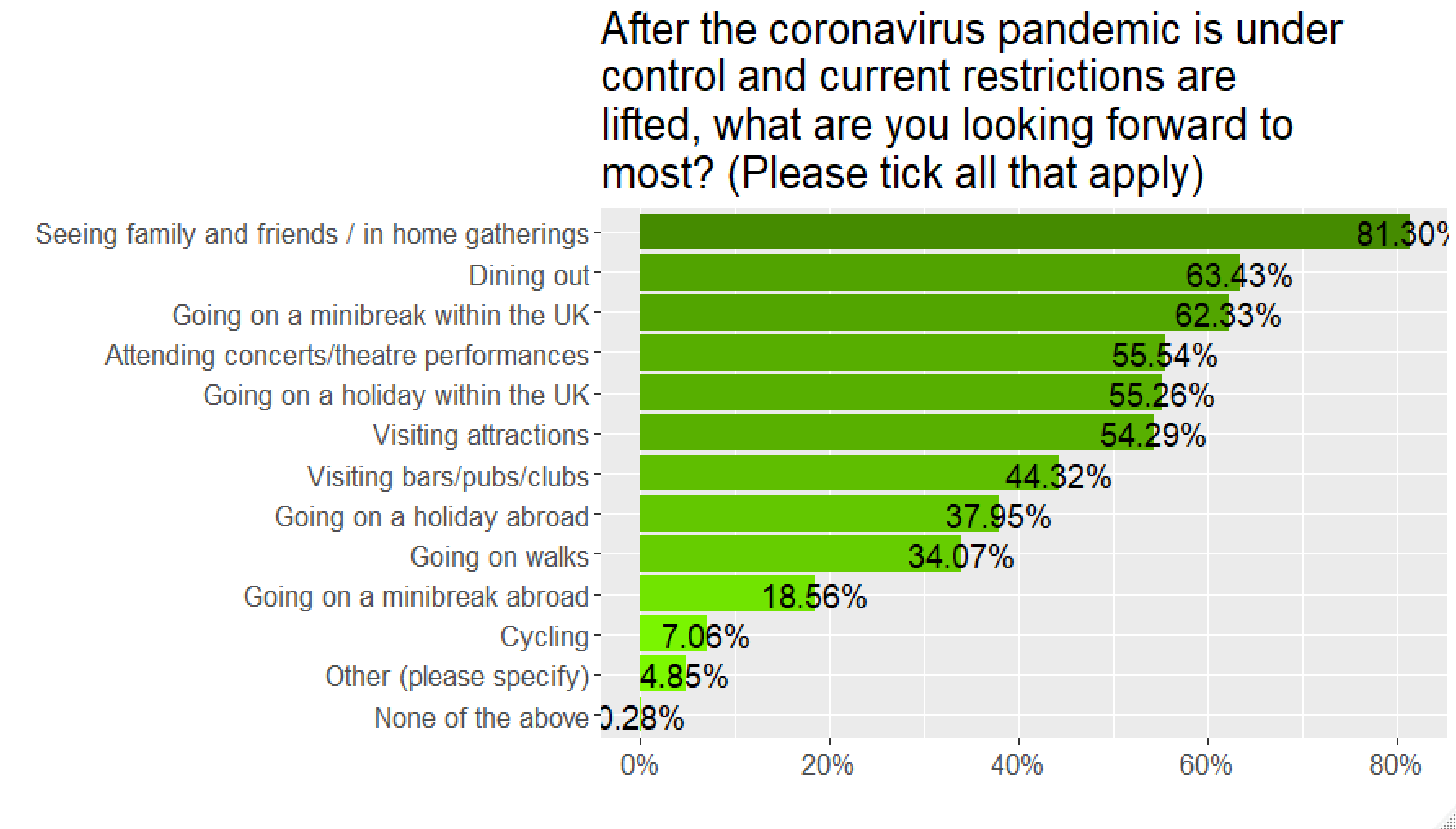
Of the "other":

50% of these are Café cancellations (general meetups)

2 Splendour cancellations

5 Cinema

The rest are unique miscellaneous arts or sport events



While 'seeing family and friends' is the modal response, perhaps it is of more importance to note the 63.43% of respondents suggesting they are looking forward to dining out, especially considering the 53% of respondents saying they had to cancel a restaurant in Nottingham/ Nottinghamshire.

Subsequently, when safely available, it should be strongly recommended to spotlight Nottinghamshire's restaurant industry to not only rejuvenate the businesses that have lost sales due to the lockdown but also capitalize on the industry which is clearly anticipated after Covid-19 is under control.

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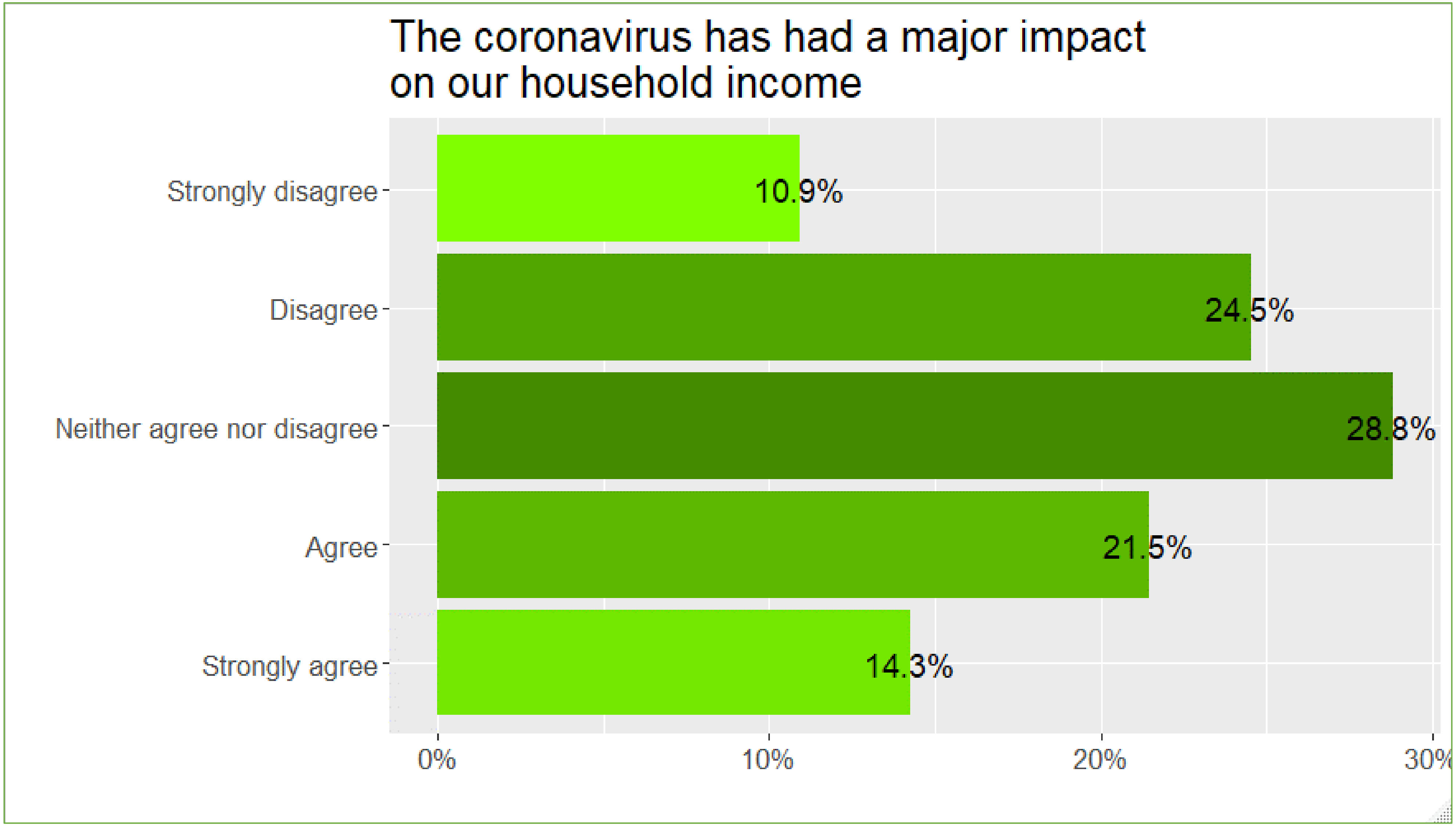
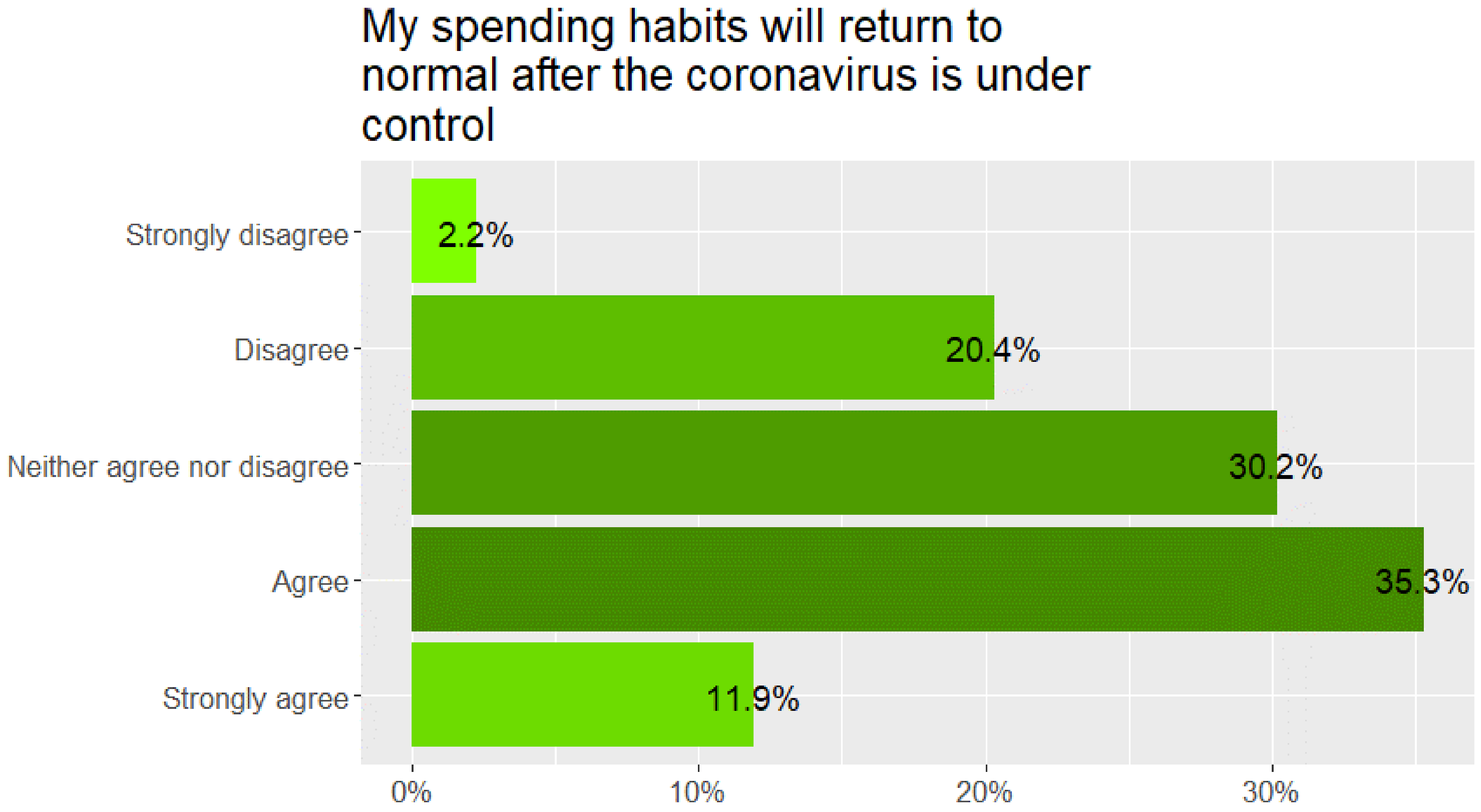
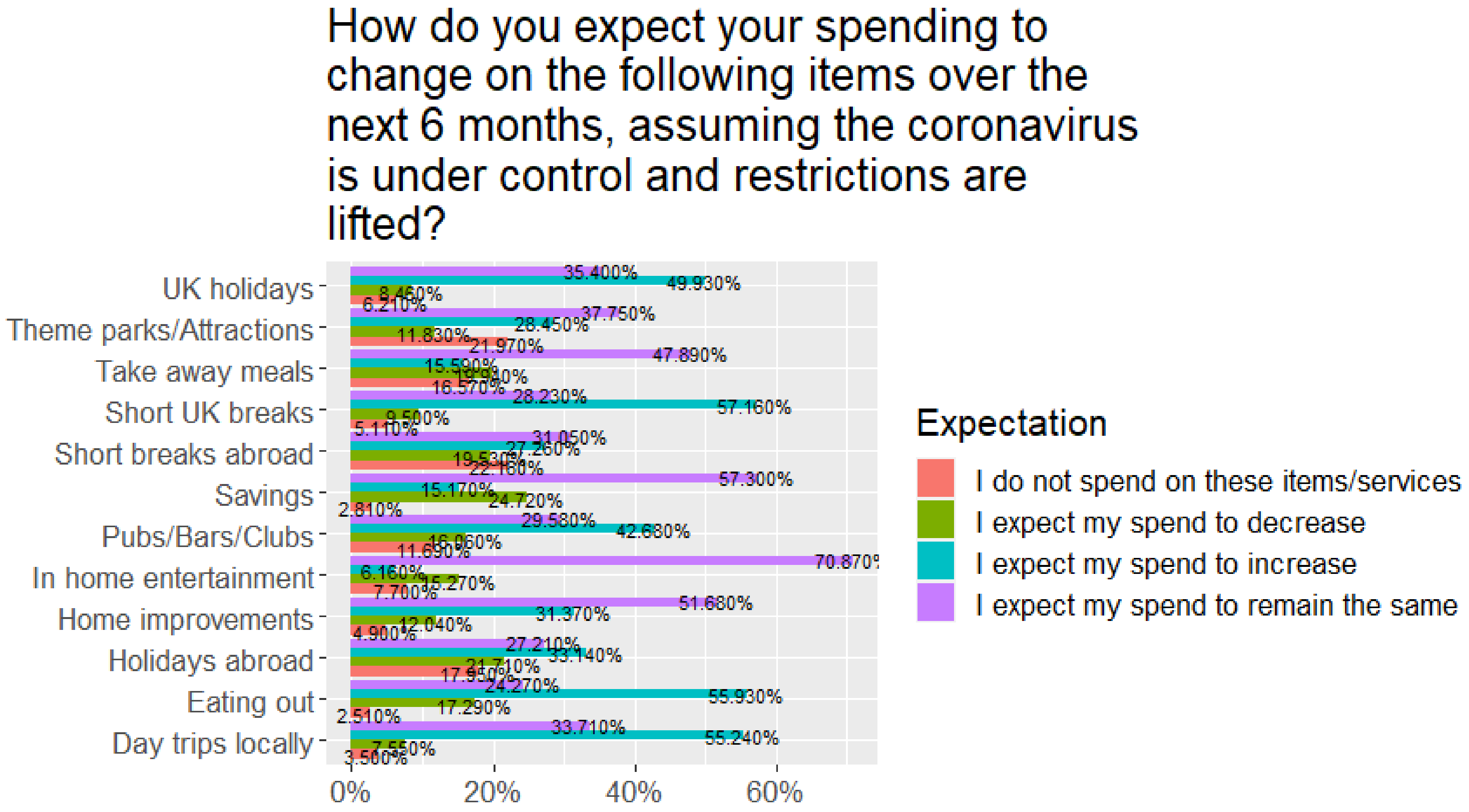


35.4% of respondents state Covid-19 hasn't had a major impact on household income whilst 35.8% agree that it's had a major impact.



22.6% of respondents forecast they will not return to normal spending habits after Covid-19, in contrast to 47.2% of respondents predicting a return to their normal spending habits



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While the results of this question are tabled on the following slide, it is clear from the bar plot alone that there is no listed item where a majority of respondents expected their spend to decrease rather than increase.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Cross table: How do you see your spending habits in 6 months, assuming lockdown measures are lifted?

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	I expect my spend to decrease		I expect my spend to remain the same		I expect my spend to increase		I do not spend on these items/services	
	Total %	N	Total %	N	Total %	N	Total %	N
In home entertainment *N=714*	15.2	109	**70.87**	**506**	6.16	44	7.70	55
Home improvements N=714	12.04	86	51.68	369	31.37	224	4.90	35
Savings N= 712	**24.72**	**176**	57.30	408	15.17	108	2.81	20
Take away meals N=712	19.94	142	47.89	341	15.59	111	16.57	118
Pubs/Bars/Clubs N=710	16.06	114	29.58	210	42.68	303	11.69	83
Eating out N=717	17.29	124	24.27	174	55.93	401	2.51	18
Theme parks/Attractions N=710	11.83	84	37.75	268	28.45	202	21.97	156
Day trips locally N=715	7.55	54	33.71	241	55.24	395	3.50	25
Short UK breaks N=705	9.50	67	28.23	199	**57.16**	**403**	5.11	36
Short breaks abroad N=686	19.53	134	31.05	213	27.26	187	**22.16**	**152**
UK holidays N=709	8.46	60	35.40	251	49.93	354	6.21	44
Holidays abroad N=691	21.71	150	27.21	188	33.14	229	17.95	124

Mode for each item highlighted in green, mode for each spending increase highlighted in bold.

Thankfully, no item had a mode of respondents expecting their spend to decrease, albeit with 24.72% of individuals expecting a decrease in their savings in 6 months.

Home entertainment, home improvements, savings, take-away meals, theme parks, and short breaks abroad have a mode of respondents stating that they expect the spend on these items to stay the same in 6 months.

Pubs/bars/clubs, Eating out, local day trips, short UK breaks, UK holidays and holidays abroad all have a mode of respondents stating there will be an increase in spending in 6 months time.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Are there any other spending adjustments that you will be making within your household post Covid-19?

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456 out of 722 responses (63%) state they are not having to adjust their spending in any other way aside from those previously stated.

Subsequently, 266 out of 722 responses (37%) suggest some form of spending adjustment post Covid-19. Examples of which are highlighted below.

"Wait for share prices to raise for long-term spending"

"Types of items purchased are likely to change"

"Try and shop at local farm shop, more expensive but used during lockdown and hope to continue "

"I have saved money during quarantine and therefore will have more to spend"

"Shopping in shops rather than online"

"We'll be more cautious for the foreseeable as we both work for a charity and therefore a second wave will really hit us hard should it happen. But we'll make the most of everything whilst it's open!"

"More savings planning for any unforeseen circumstance like Covid"

"Maintaining charitable donations to Arts and Music organisations, and to long-term preferred charities "

"We've saved much more whilst on lockdown and will be looking to spend less than we did before lockdown, once restrictions are lifted. So whilst spending will increase, we hope it won't increase to previous levels. "

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

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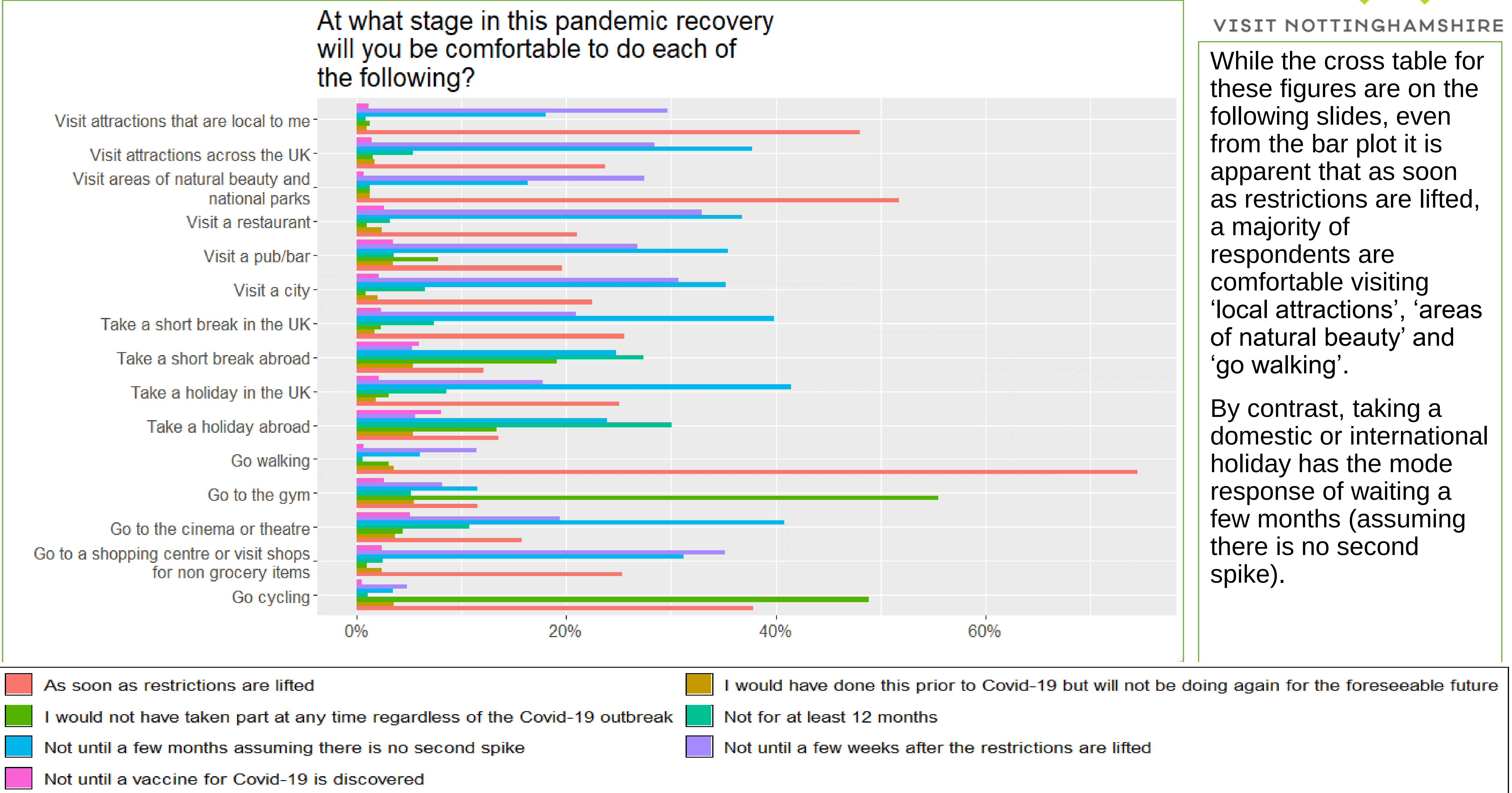

While the cross table for these figures are on the following slides, even from the bar plot it is apparent that as soon as restrictions are lifted, a majority of respondents are comfortable visiting 'local attractions', 'areas of natural beauty' and 'go walking'.

By contrast, taking a domestic or international holiday has the mode response of waiting a few months (assuming there is no second spike).

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Cross table: At what stage in the pandemic do you feel comfortable doing the following?

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Activity	As soon as restrictions are lifted		Not until a few weeks after the restrictions are lifted		Not until a few months assuming there is no second spike		Not for at least 12 months		Not until a vaccine for Covid-19 is discovered		I would have done this prior to Covid-19 but will not be doing again for the foreseeable future		I would not have taken part at any time regardless of the Covid-19 outbreak	
	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N
Go walking N = 707	**74.54**	**527**	11.46	81	6.08	43	0.57	4	0.71	5	3.54	25	3.11	22
Go cycling N= 669	37.82	253	4.78	32	3.44	23	1.05	7	0.45	3	3.59	24	48.88	327
Go to the gym N=659	11.53	76	8.19	54	11.53	76	5.16	34	2.58	17	**5.46**	**36**	**55.54**	**366**
Go to a shopping centre or visit shops for non-grocery items N=714	25.35	181	**35.15**	**251**	31.23	223	2.52	18	2.38	17	2.38	17	0.98	7
Visit a restaurant N= 717	21.06	151	32.91	236	36.82	264	3.21	23	2.65	19	2.37	17	0.98	7
Visit a pub/bar N=695	19.57	136	26.76	186	35.40	246	3.60	25	3.45	24	3.45	24	7.77	54
Go to the cinema or theatre N=705	15.74	111	19.43	137	40.85	288	10.78	76	5.11	36	3.69	26	4.40	31

Mode for each activity highlighted in green, mode for each stage highlighted in bold (as is the case for the table on the following slide)

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

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Please tell us in your own words how you currently feel about taking a holiday or short break once all travel restrictions are lifted. What are your hopes? What are your worries or anxieties? (Custom responses)

Common themes: 5% of respondents will feel comfortable once a vaccine has been developed (they or their partners are ‘at risk’). 5% are also concerned about planning a holiday due to the unpredictable nature of a second spike. Equally approximately 5% can’t wait to return as soon as possible.

Of the respondents hoping to travel and book accommodation: there is a strong preference for self-catering, and virtually every response is concerned for the hygiene of accommodation (hand-sanitiser availability and public toilets are major concerns).

Concerns for transportation: concerns about air travel being “even more of a hassle” following Covid-19. Less than 1% of responses mention transportation though.

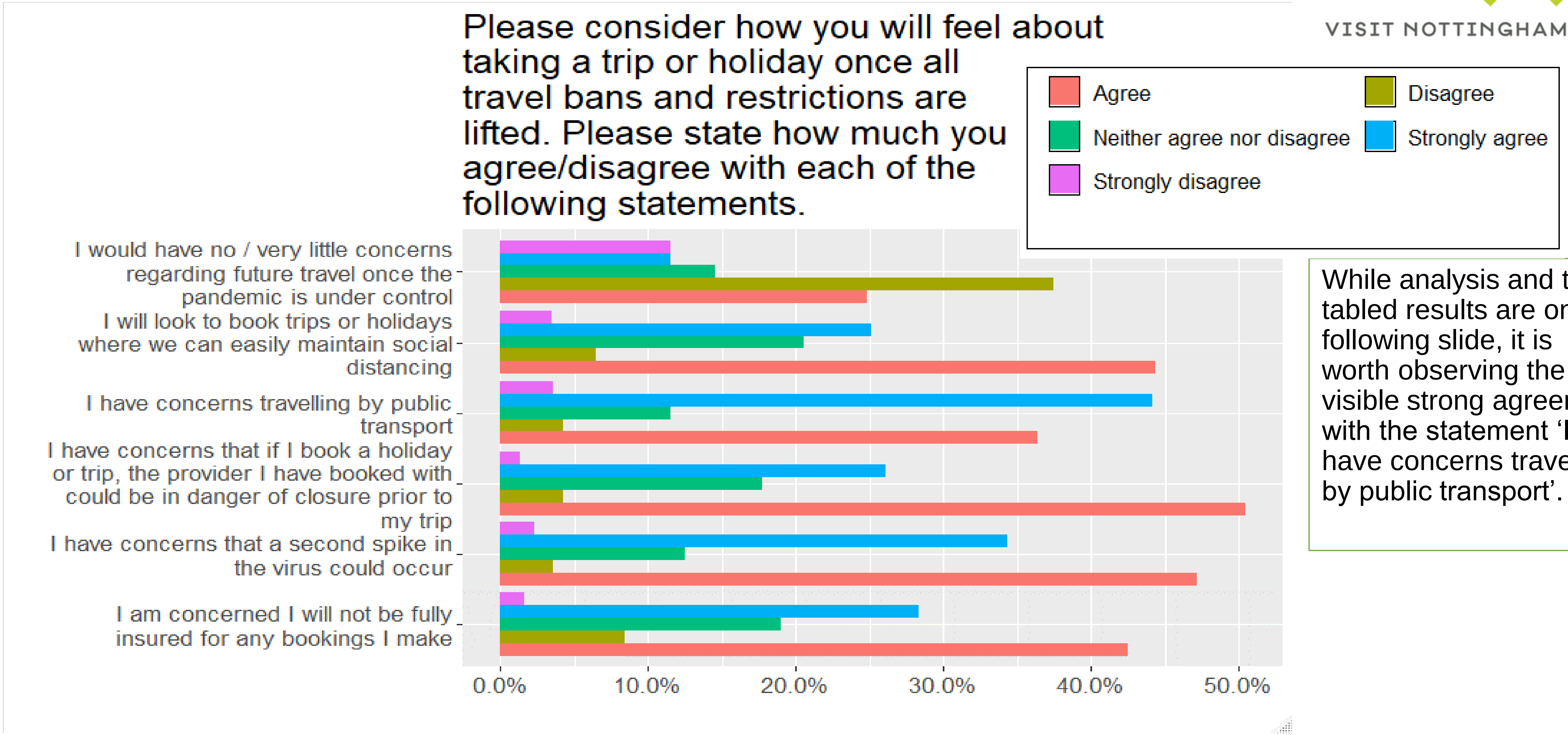
20% are looking at UK breaks this year if lockdowns are raised (of which half hope to travel in the summer period), 30% of responses mention taking a holiday next year (in 6 months). Due to the seasonal trend in visitors it may be the case that there’s a greater influx in visitors following the peak months of April.

“Hope to Visit Nottingham from Japan as soon as possible. Probably not until early 2021 however. ”

“I’ll be supporting tourism in the UK first and foremost as I think flights and such will be a nightmare for the first few months.”

“We are staying locally. I don't trust public toilets so pick activities that are within a 3 hour there and back period. ”

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire



While analysis and the tabled results are on the following slide, it is worth observing the visible strong agreement with the statement 'I have concerns travelling by public transport'.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Please consider how you will feel about taking a trip or holiday once all travel bans and restrictions are lifted. Please state how much you agree/disagree with each of the following

Concern	Strongly agree		Agree		Neither agree nor disagree		Disagree		Strongly disagree	
	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N
I would have no / very little concerns regarding future travel once the pandemic is under control N= 720	11.53	83	24.86	179	14.58	105	**37.50**	**270**	**11.53**	**83**
I have concerns that a second spike in the virus could occur N = 720	34.31	247	47.22	340	12.50	90	3.61	26	2.36	17
I have concerns that if I book a holiday or trip, the provider I have booked with could be in danger of closure prior to my trip N = 721	26.07	188	**50.49**	**364**	17.75	128	4.30	31	1.39	10
I am concerned I will not be fully insured for any bookings I make N= 720	28.33	204	42.50	306	19.03	137	8.47	61	1.67	12
I will look to book trips or holidays where we can easily maintain social distancing N= 721	25.10	181	44.38	320	**20.53**	**148**	6.52	47	3.47	25
I have concerns travelling by public transport N = 720	**44.17**	**318**	36.39	262	11.53	83	4.31	31	3.61	26

Mode for each concern highlighted in green, mode for level of agreement highlighted in bold

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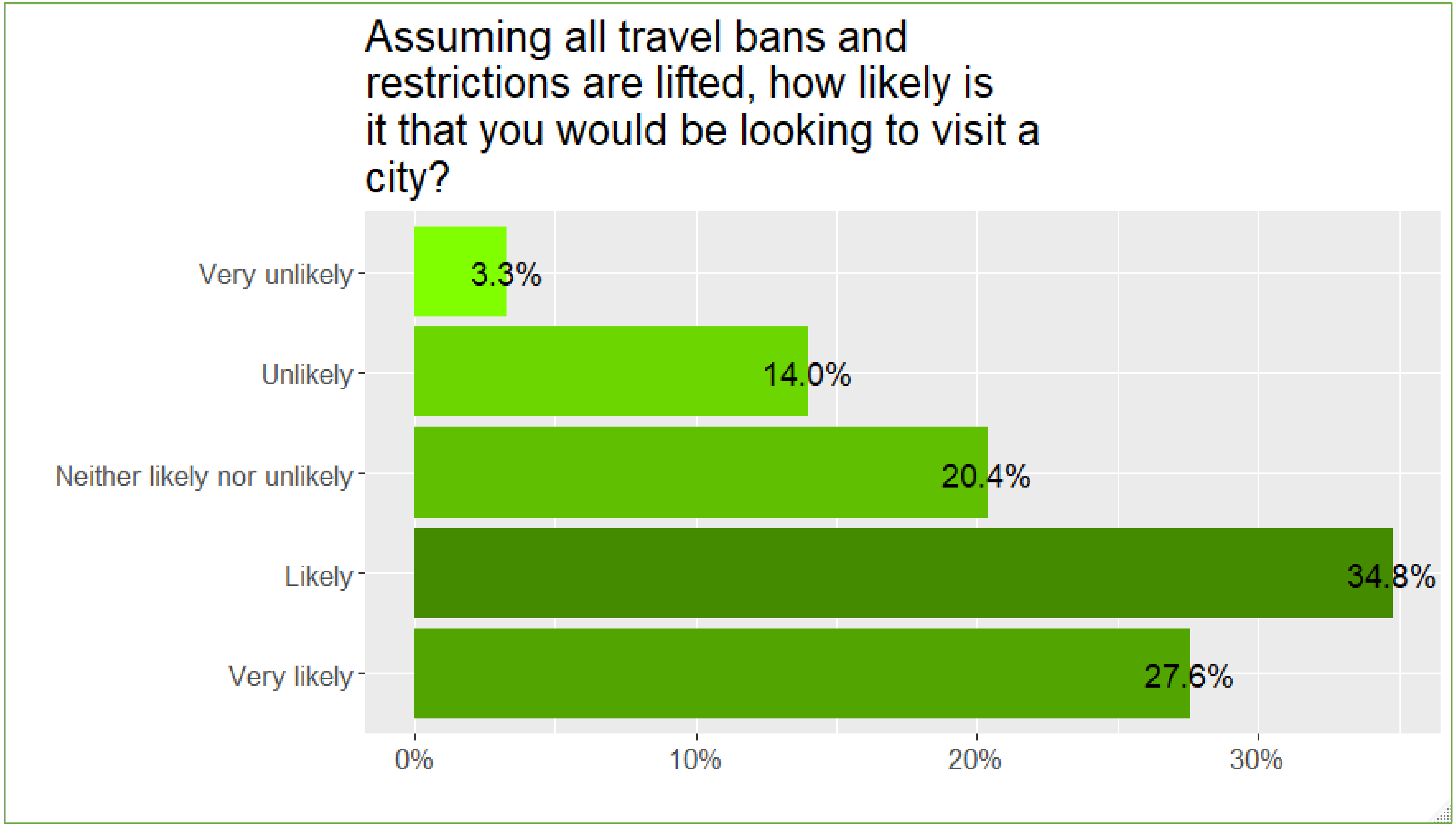
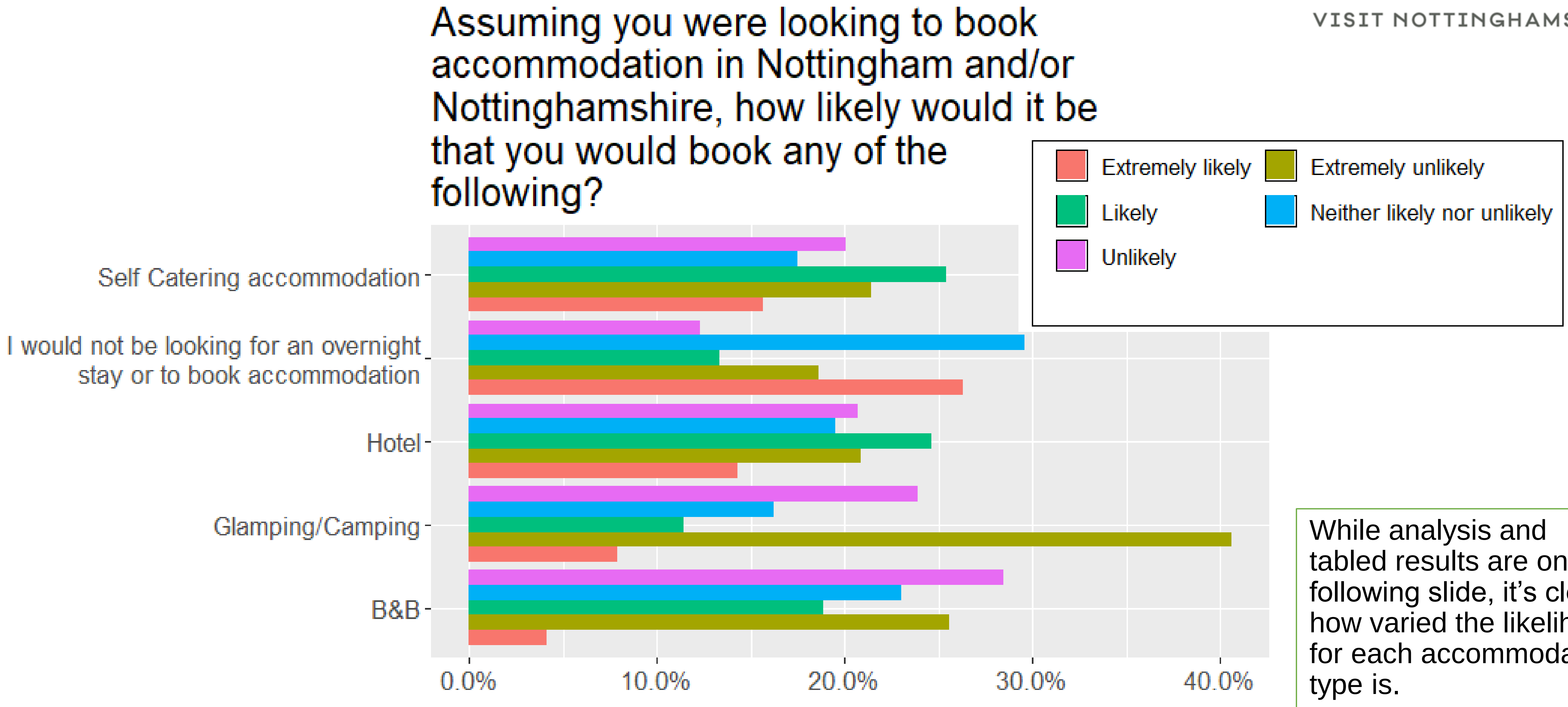
The only concern that has a mode for 'strongly agree' is usage of public transport (44.7%)

The only concern that has a majority of respondents (50.49%) in agreement is a concern if a already booked travelling agent is at risk of closure; interestingly that is only one of two concerns unrelated to the health of the respondent.



62.4% of respondents expressed some degree of likelihood to wanting to visit a city.



While analysis and tabled results are on the following slide, it's clear how varied the likelihood for each accommodation type is.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Cross table: Assuming you were looking to book accommodation in Nottingham and/or Nottinghamshire, how likely would it be that you would book any of the following?

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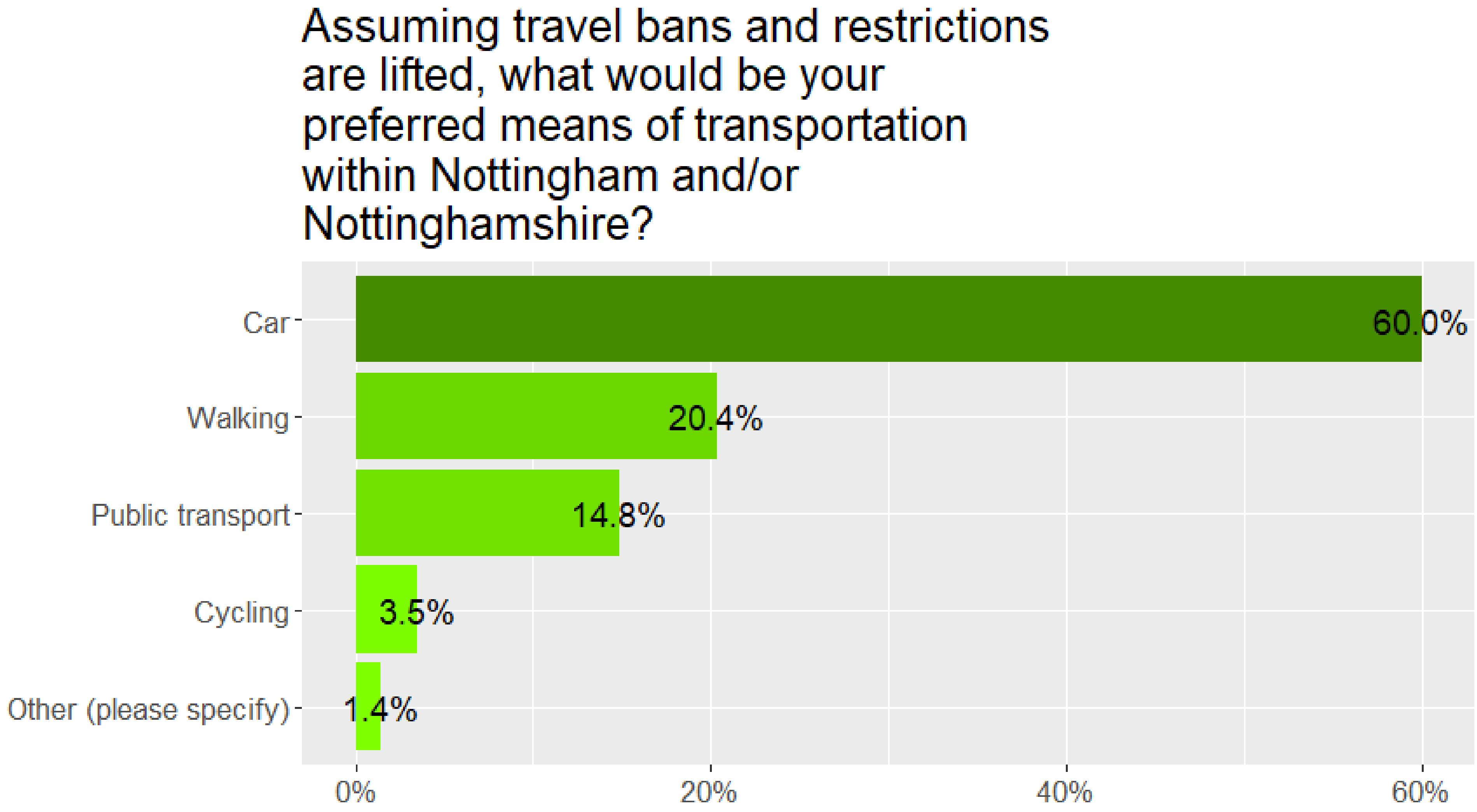
Accommodation	Extremely likely		Likely		Neither likely nor unlikely		Unlikely		Extremely unlikely	
	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N
Hotel N = 671	14.31	96	24.59	165	19.52	131	20.72	139	20.86	140
B&B N = 657	4.11	27	18.87	124	22.98	151	**28.46**	**187**	25.57	168
Self-Catering accommodation N = 658	15.65	103	**25.38**	**167**	17.48	115	20.06	132	21.43	141
Glamping/Camping N = 648	7.87	51	11.42	74	16.20	105	23.92	155	**40.59**	**263**
I would not be looking for an overnight stay or to book accommodation N = 684	**26.32**	**180**	13.30	91	**29.53**	**202**	12.28	84	18.57	127

Mode for each accommodation highlighted in green, mode for each likelihood in bold

26.32% of respondents would not be looking for any form of booked accommodation. However, these respondents could be VFR visitors or locals of Nottingham.

A similar 25.38%, and 24.59% of respondents are likely to book a hotel or self-catering accommodation (respectively). As respondents could pick multiple options, it's very likely these are the same respondents for each question (there's only a difference of 2 respondents).



It should be noted that this question was not multiple choice. It could possibly be the case individuals drive to Nottinghamshire/ Nottingham by car and then utilise Nottingham City Transport as suggested by some of the custom responses

Of the "other":

One individual specifically mentions the tram, whilst all other responses mention a combination of car/public transport.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

What measures could accommodation providers take to make you feel safe during your visit following the coronavirus pandemic?

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Common themes:

80% of responses are hygiene related: approximately 40% of which are looking for assurances that accommodations perform a 'deep clean' before and after occupancy, while another other 40% explicitly request an abundance of 'hand sanitizer' and PPE available upon request/worn by staff. The remainder of hygiene responses (20%) specifically state a preference for self-serviced accommodation as they only trust food they have prepared themselves.

10% of responses were not applicable (virtually all of these responses were locals of Nottinghamshire).

The final 10% of responses supported some measures of social distancing following the pandemic, expressing a desire that government guidelines are upheld by staff members

"Depends what 'following' means. It would need to be fully eliminated or a vaccine provided before I would feel safe in other accommodation "

"Deep cleaning procedures, everyone wearing masks, social distancing, individual meals "

"Anyone not strictly adhering to a minimum 2 metre distance would immediately be required to leave. If the 2 metre rule is reduced there is nothing in the foreseeable future that would entice me into a public place that has the potential to be busy or I would have to queue for more than 30 minutes to enjoy. "

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

Please tell us in your own words how you currently feel about visiting attractions once they're open to the public. What are your hopes? What are your worries or anxieties? What kind of events would you be happy to attend? (Custom responses)

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Approximately 40% of the respondents to this question were not interested in any specific visitor attractions.

Like the previous question, there is an overwhelming concern on the upkeep of hygiene (especially in toilets) and safe social distancing measures. Venues such as the Royal Concert Hall are cited as ‘unviable’ until all physical restrictions are a thing of the past.

Museums were mentioned by 7.5% of respondents, and virtually every response stated that they would like to support these attractions (as they sensed financial difficulties), albeit with social distancing measures in place.

“Cultural events are my favourites. They have to be organized around protective measures, though, because we don't yet have assurances that their won't be a second wave. ”

I can’t wait! I think museums will struggle at first, so I’m keen to support them. I also want to shop locally and support independents during these uncertain times. I won’t be going to Primark when places like Hopkinsons need support! ”

“I’d like To be able to get back to Normal next year, but events this year are a write off for me personally. ”

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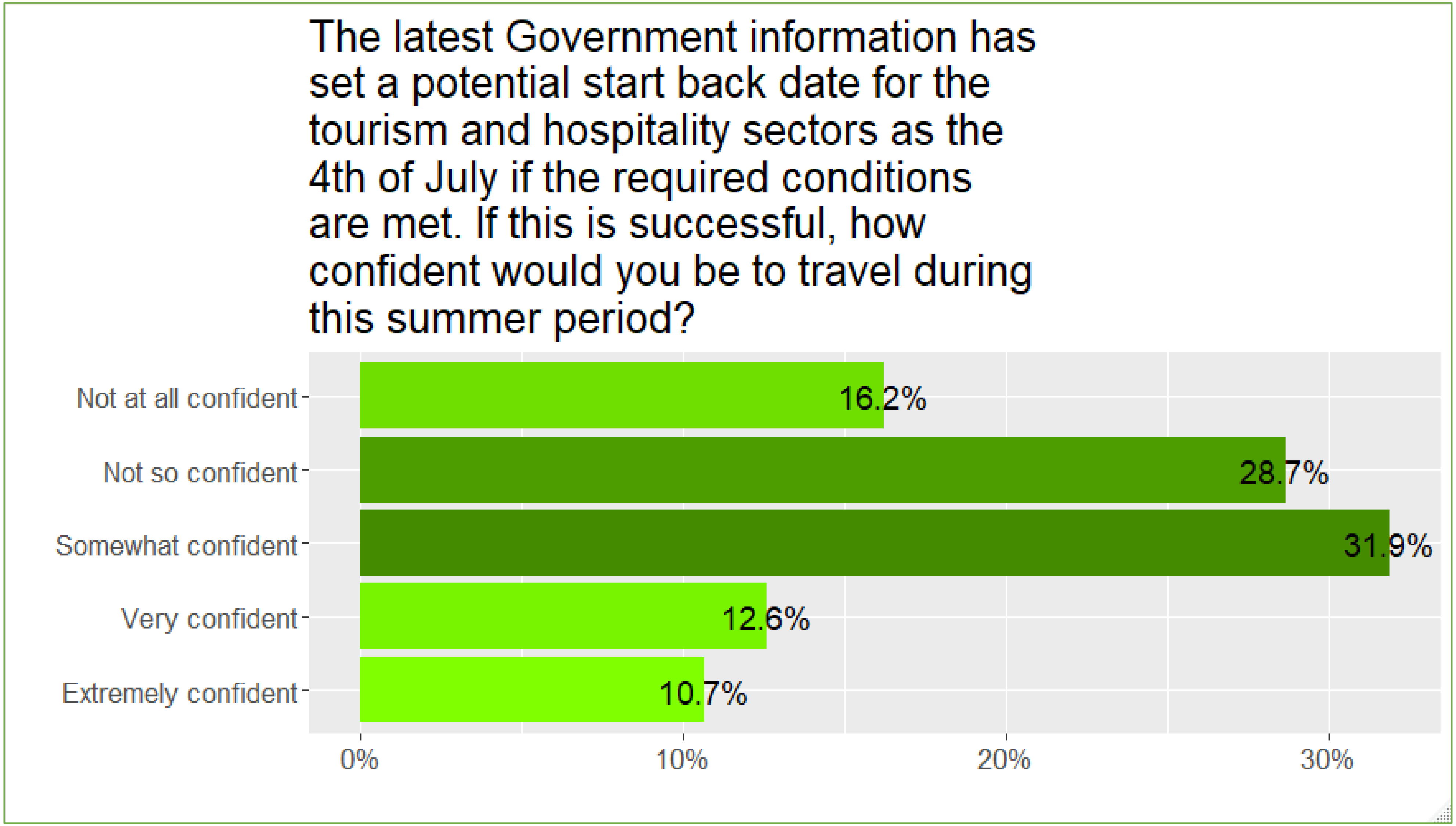
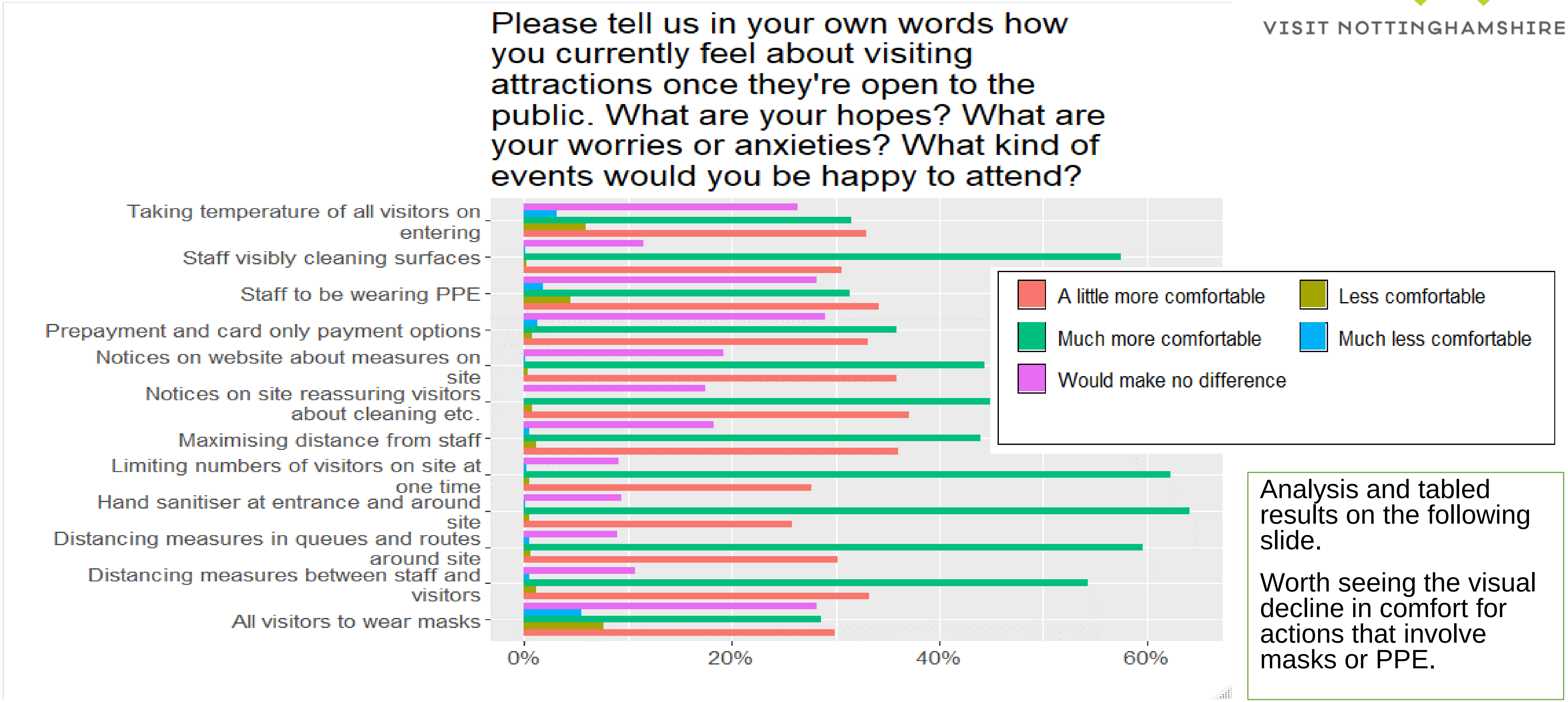


76.73% of respondents state they have at least some degree of confidence for travelling in the summer period (following July the 4th).

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire



Analysis and tabled results on the following slide.

Worth seeing the visual decline in comfort for actions that involve masks or PPE.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire
Cross table: Thinking about attractions, assuming lockdown restrictions have been lifted and the attraction has reopened, which of the following measures would make you feel more comfortable about visiting?

	Much more comfortable		A little more comfortable		Would make no difference		Less comfortable		Much less comfortable	
	Total %	N	Total %	N	Total %	N	Total %	N	Total %	N
Prepayment and card only payment options N = 720	35.83	258	33.06	238	29.03	209	0.83	6	1.25%	9
Limiting numbers of visitors on site at one time N = 722	62.33	450	27.70	200	9.14	66	0.55	4	0.28%	2
Distancing measures in queues and routes around site N = 722	59.56	430	30.19	218	9.00	65	0.69	5	0.55%	4
Distancing measures between staff and visitors N = 721	54.37	392	33.29	240	10.68	77	1.11	8	0.55%	4
Staff to be wearing PPE N = 717	31.38	225	**34.17**	**245**	**28.17**	**202**	4.46	32	1.81%	13
All visitors to wear masks N = 716	28.63	205	29.89	214	**28.21**	**202**	**7.68**	**55**	**5.59%**	**40**
Taking temperature of all visitors on entering N = 718	31.48	226	33.01	237	26.32	189	5.99	43	3.20%	23
Notices on website about measures on site N = 721	44.38	320	35.92	259	19.14	138	0.42	3	0.14%	1
Notices on site reassuring visitors about cleaning etc. N = 718	44.85	322	37.05	266	17.41	125	0.70	5	0.00%	0
Staff visibly cleaning surfaces N = 720	57.50	414	30.56	220	11.53	83	0.28	2	0.14%	1
Hand sanitiser at entrance and around site N = 722	**64.13**	**463**	25.76	186	9.42	68	0.55	4	0.14%	1
Maximising distance from staff N = 721	43.97	317	36.06	260	18.31	132	1.11	8	0.55%	4

Mode for each measure highlighted in green, mode for each comfort level highlighted in bold

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While each action on average increases comfort by some degree, it's clear that the **requirement** for staff/visitors to be wearing PPE or masks, and taking the temperature of visitors, is significantly less comforting to the majority of respondents than all other actions.

Despite this, if the government guidelines state that staff must be wearing PPE, it is essential to do so.

Should be noted that the modal response (64.13%) for 'much more comfortable' is 'hand sanitiser'. This was also an extremely popular option when respondents were able to write custom responses which would improve their wellbeing when staying in accommodation.

Covid-19 Tourism Recovery Consumer Survey – Nottingham & Nottinghamshire

What other safeguards/restrictions would you like to see in place? (Custom responses)

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80% of respondents state that they have no other restrictions that they would like to see in place.

10% of respondents used this question to repeat their hygiene concerns (yet again, the availability of hand sanitiser was frequently mentioned).

The remaining 10% were mixed responses on the government's social distancing guidelines. Roughly 5% of respondents were concerned about whether trained staff members had the confidence to manage and enforce government guidelines (multiple propositions for staff being able to remove customers that do not social distance from premises), while the remaining 5% were cynical that customers were going to follow the guidelines regardless, or in the absence, of staff intervention.

"Strict 'policing' of social distance which isn't realistic. The general public feel that lockdown is over and do not/will not socially distance. It is the general public who are the problem not proprietors. "

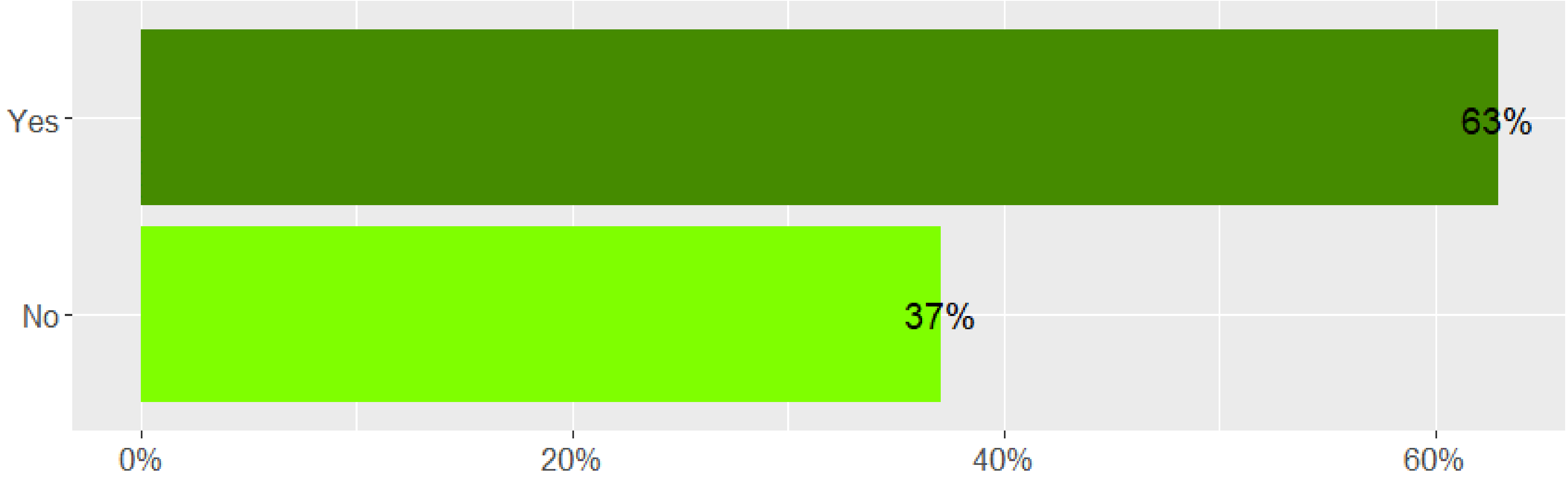
"Staff being able to confidently crowd control."

"A clear signage and penalty of dismissal if safeguards are knowingly ignored by public. "

"Handing out masks to people without one, asking people to leave if they do not keep rules "

VISIT NOTTINGHAMSHIRE

Would a nationally recognised industry 'Standard Mark' displayed by tourism businesses, attractions and destinations provide you with the reassurance that these businesses have adhered to all government guidelines and are safe to visit?



Respondents also were asked to give their opinion, regardless of yes/no, on this 'standard mark'.

Those which gave an extra response **overwhelmingly** stated their concern with this 'standard mark' is in how the inspection process works. One respondent succinctly sums up these concerns with **"A tick box exercise is only as good as the moment it is done."**

The two reoccurring concerns are 'How is this mark maintained?' and 'Who is delivering the inspections'

Only 1% of comments were overwhelmingly negative, while approximately 25% were reconfirming their reassurance. Yet, the remaining 74% were sceptics towards the implementation and maintenance for the standard mark. Specifically in regards to confidence in fellow shoppers, 'customers are the issue anyway'.

Contact:

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