



Domestic COVID-19 Tracker – Wave 2 – Top line results

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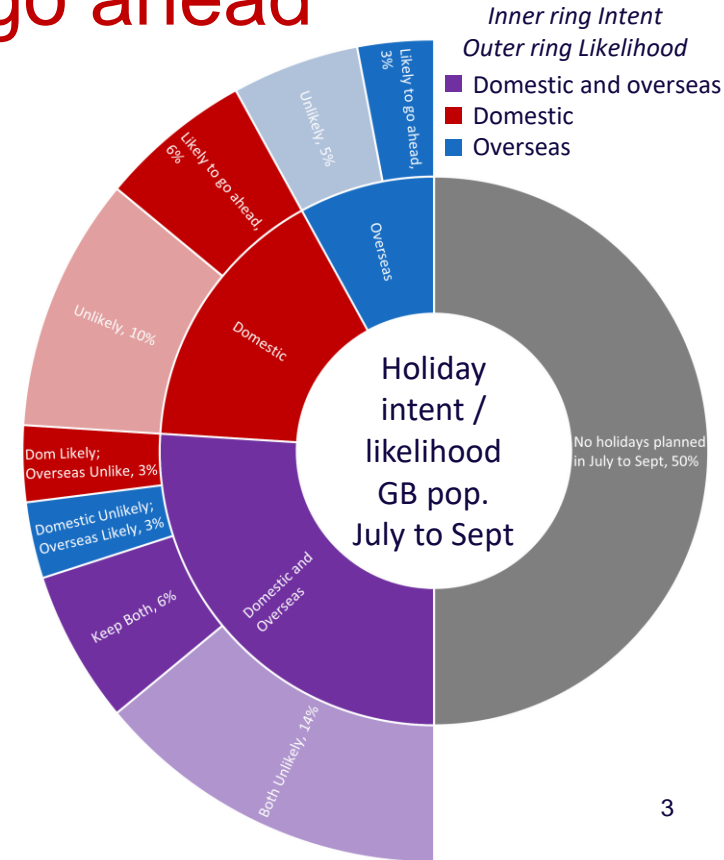
April 2020

Executive Summary

- The majority of the GB population who have planned a holiday from July to September believe it unlikely to go ahead. This is true for both domestic and overseas holidays.
- A minority of the population who have cancelled holidays are looking to replace them, but these replacement holidays are most likely to be from October onward.
- The South West and Scotland are the top destinations being considered, with rural and coastal the top location type.
- Those looking to replace an overseas holiday with a domestic holiday are more likely to be families, and aged 35-54 years old.
- Those looking to replace a domestic holiday with another domestic holiday are more likely to be aged 55+.

Planned holidays unlikely to go ahead

- 50% of GB adults are / were intending to take either a domestic holiday, overseas holiday or both in Q3 (July to September). 50% had no holidays planned.
- When asked to consider whether or not that holiday was likely to go ahead, the majority of intenders said it was unlikely to go ahead.
- This results in the current likelihood for holidays to go ahead (either domestic, overseas or both) to be 21% this is down from an intent of 50%, with 79% (42m GB population) likely to have no holiday at all.
- Domestic holiday likelihood is down to 15%, from an intent of 41%, with 27% unlikely to take the holiday.
- Overseas holiday likelihood is down 12%, from an intent of 34%, with 22% unlikely to take the holiday.



Summer Holidays lost not likely to be replaced

- Those saying their holiday was unlikely to go ahead were asked whether they would replace their holiday with a domestic or overseas holiday, or not at all.
- The majority are not looking to replace with any holiday, domestic or overseas.
- Out of domestic holidays unlikely to go ahead only 6% (3.4m) of the 27% (1.5m) said they would replace their domestic holiday.
- Out of overseas holidays unlikely to go ahead, 4% (2.4m) of the 22% (11.8m) said they would replace their overseas holiday with a domestic holiday.

% of GB 16+ population	DOMESTIC	OVERSEAS
% who planned a holiday	41%	34%
% likely to go ahead w. holiday	15%	12%
% unlikely to go ahead w. holiday	27%	22%
% who plan to book a replacement holiday in the UK	6%	5%
	11%	
Net loss to Domestic	-16%	

This results in a net loss of 16% from 41% planned domestic holidays. Or from 21.9m people intending to holiday domestically to 13.6m likely to.

When will replacement holidays happen?

- Domestic holiday replacements more likely to happen in July to September (40% of domestic replacements), vs replacement holidays abroad (30%).
- However the majority of replacement holidays to happen after October.

<i>When do you think you will take your replacement holiday abroad?</i>	Domestic replacement	Abroad replacement
Sometime between April and June	6%	4%
Sometime between July and September	40%	30%
Sometime after October	54%	66%

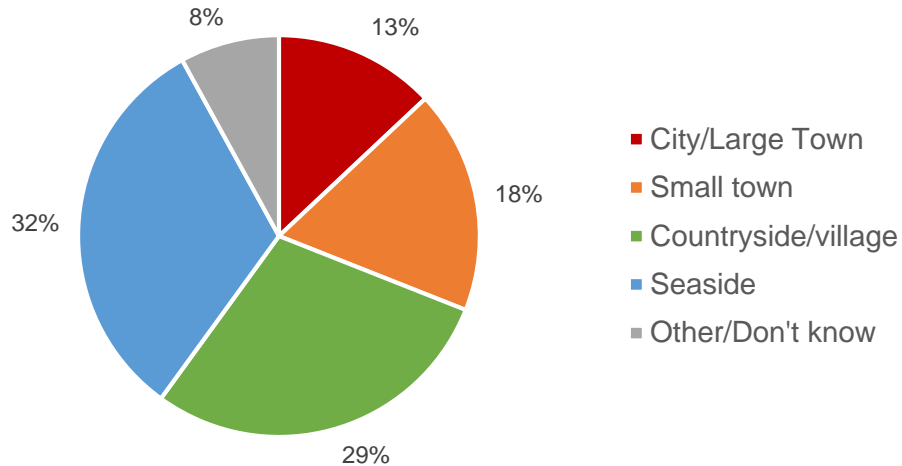
Regions considered for Domestic

	Planned UK holiday	Replacement UK holiday
	%	%
ENGLAND		
London	5%	1%
South East	3%	1%
East Anglia	3%	1%
South West	11%	4%
East Midlands	1%	0%
West Midlands	2%	0%
North East	4%	1%
North West	4%	0%
SCOTLAND	9%	3%
WALES	5%	2%
NORTHERN IRELAND	1%	1%
DON'T KNOW	NA	3%

- For both those who are planning a UK holiday, and for those who are considering a replacement for either a cancelled domestic or overseas holiday, the South West and Scotland are the most considered destinations.

Location type considered for Domestic

Intended location type for all considering a replacement holiday (excluding London)



- Countryside and seaside are the top considered destination types amongst those considering a replacement holiday (likely skewed by regional consideration).

Demographics of replacers

	GB adults that planned a UK holiday in April-Sept	Unlikely to take planned UK holiday, but considering replacing with another UK holiday	Unlikely to take planned overseas holiday, but considering replacing it with a UK holiday
	%	%	%
Male	49	48	54
Female	51	52	46
25-34	32	29	34
35-44	34	31	40
55-64	34	40	26
Working	64	61	66
Not Working	36	39	34
Child at home	30	27	39
No child at home	70	73	61

- Those looking to replace a cancelled UK holiday with another domestic are more likely to be 55+
- Those looking to replace a cancelled holiday overseas with a UK holiday are more likely to be families and those aged between 35-44.

Methodology

- Omnibus survey of GB population
- Fielded: 2nd-4th April
- n=1,248 GB Adults 16+

- Aim to understand the intended plans of both domestic and overseas holiday makers over the Summer (July to Sept), and the likelihood of their planned holidays going ahead.