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UNDERSTANDING VISITOR HOLIDAY PLANS IN SOUTH EAST ENGLAND

Visitor sentiment for future travel
as of 15 June 2020

Understanding holiday plans in this new world

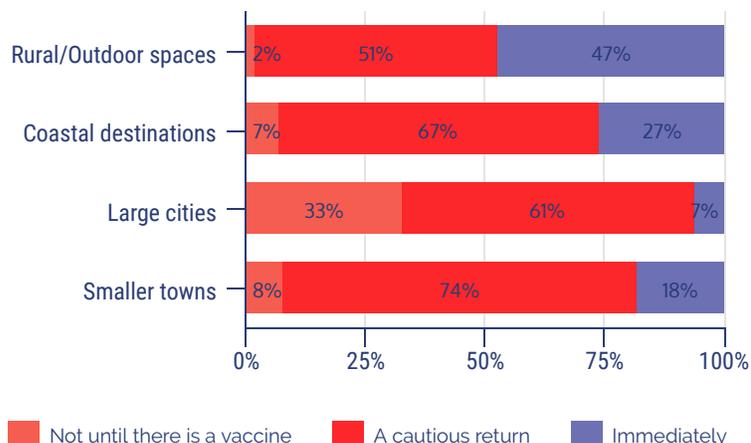
Headline results:

- As soon as government allows, most people said they would immediately return to visit outdoor spaces (47%) and 27% would immediately return to coastal destinations. 74% said they would cautiously return to small towns
- As soon as government allows, 33% said they would immediately stay in friends or family accommodation, 22% would immediately use self catering accommodation and 17% would immediately return to campsites
- As soon as government allows, 33% said they would immediately return to visit gardens and 25% would immediately return to visit beaches. 45% would cautiously return to stately homes, 44% to visit piers and 42% to museums and art galleries
- 10% would most likely book their first short break to the South East in August and a further 18% in September. 24% said they would not book until next year
- The majority of visitors still plan on travelling by private car to a destination - 86%
- With regard to future travel habits, nearly a third felt that they would now stay more local - 31%
- 46% would now travel for up to two hours for a day out, and over half (54%) would travel between two and four hours for a short break
- Approximately two thirds felt that leisure spend post lockdown would not alter for days out, short breaks or longer UK holidays
- Whilst most peoples current plans in the South East have either been cancelled or postponed without a date known, encouragingly, 23% have already had their plans rescheduled
- When asked about changes to holiday 'wish lists' for the future, 43% did not foresee any changes. However, 28% said they were more likely to incorporate local produce/resources in their choices and 27% said they would be seeking small capacity solutions
- A third said they would now prebook some elements of their leisure time in advance - 37%
- Two thirds said they would have confidence in booking future events if there was a guarantee of a refund if cancelled - 66%
- The main safety concern for future visits was about other visitors not taking appropriate precautions - 56%
- Nearly half felt that they would now do more digital research prior to booking a leisure activity - 47%
- When asked about their thoughts on a 'Standard Mark' for the tourism industry identifying that safeguarding measures have been put in place, 48% felt it might influence them if choosing between two places

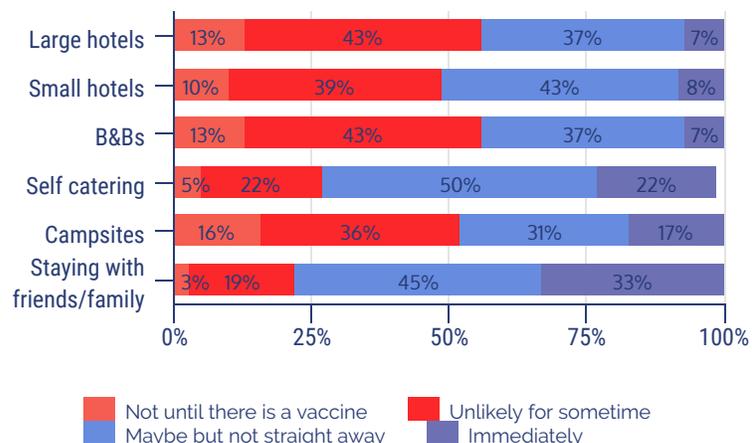
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As soon as government allows, how quickly will you return to:

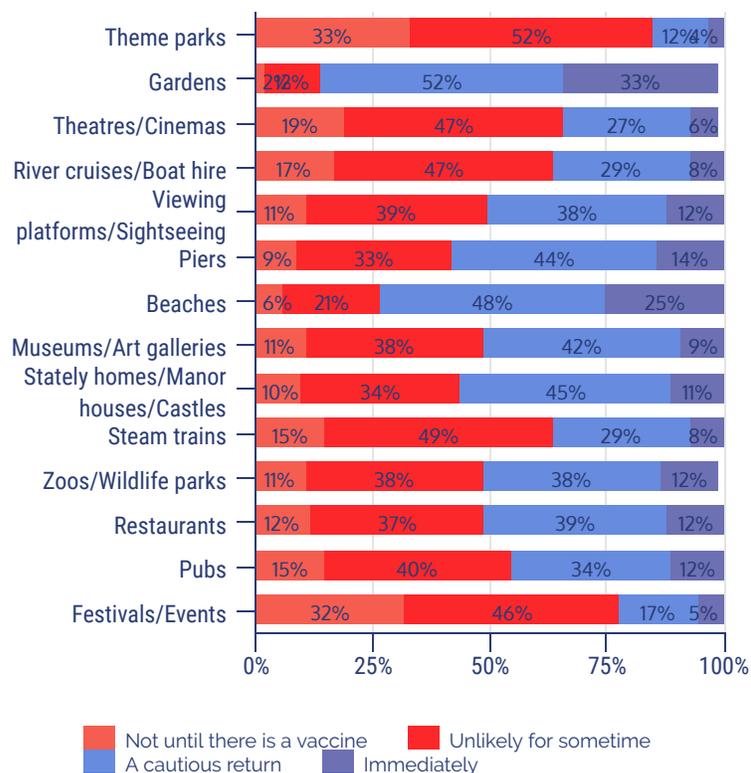
These types of places:



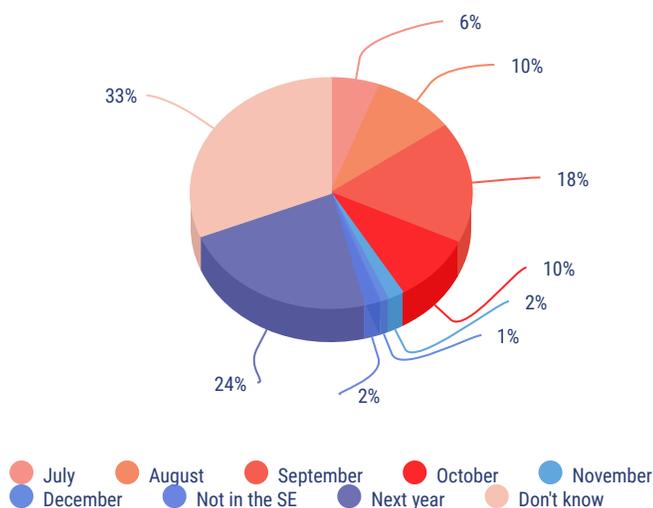
These types of accommodation:



These types of places to visit:



When likely to book first short break in the South East?

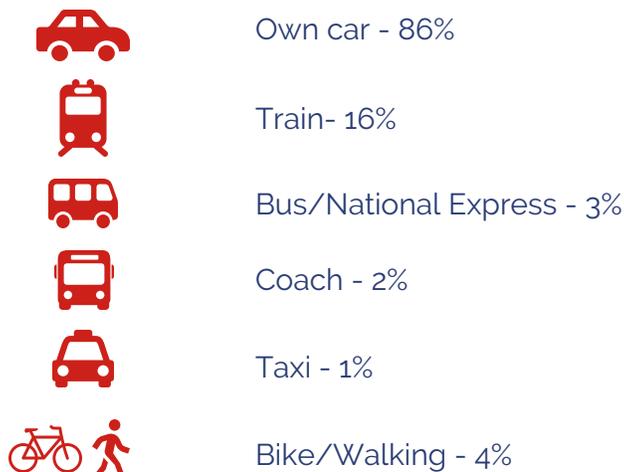


Place or destination most looking forward to visiting:

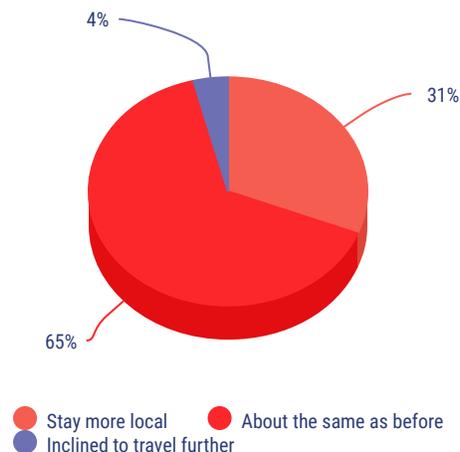
- East Sussex 27% (including 13% that mentioned Brighton/Hove and 6% that mentioned 1066 Country)
- Kent 23% (including 4% that mentioned Broadstairs and/or Margate)
- The beach or coast in general 17%
- Dorset 16% (including 5% that mentioned Bournemouth)
- Hampshire 14% (including 3% that mentioned the New Forest)
- Isle of Wight 12%

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What type of transport will you be using?



Will your travel habits change in the future?



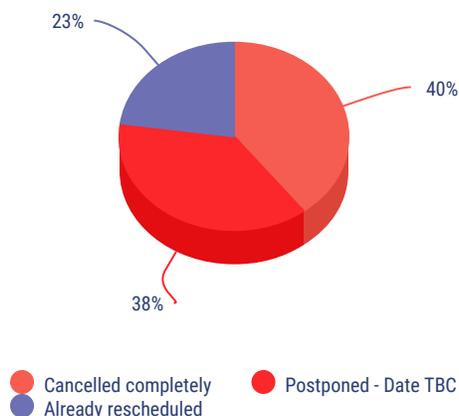
How long willing go travel?

	Day out	Short break (2-4 nights)	Holiday (7+ nights)
Up to 1/2 hour	4%	0%	0%
Up to 1 hour	32%	2%	1%
Up to 2 hours	46%	19%	5%
Up to 3 hours	9%	29%	12%
Up to 4 hours	2%	25%	20%
5+ hours	2%	16%	45%
Don't know	4%	9%	17%

What will leisure spend look like post lockdown?

	Day out	Short break (2-4 nights)	UK Holiday (7+ nights)
No money	2%	2%	2%
Less money	21%	18%	17%
Same money	65%	63%	58%
More money	7%	9%	14%
Don't know	6%	8%	9%

If you have had to cancel plans in the South East, what is the current situation?

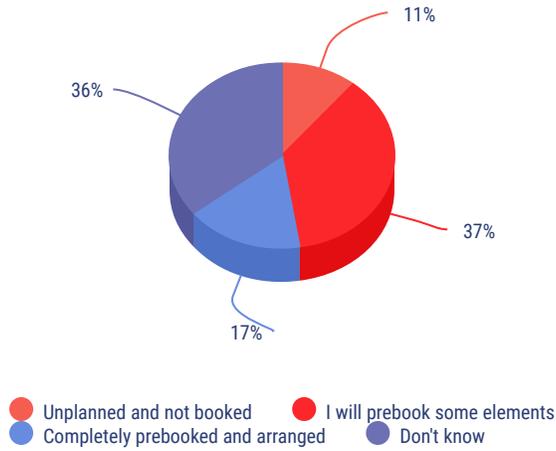


How holiday 'wish list' will change?

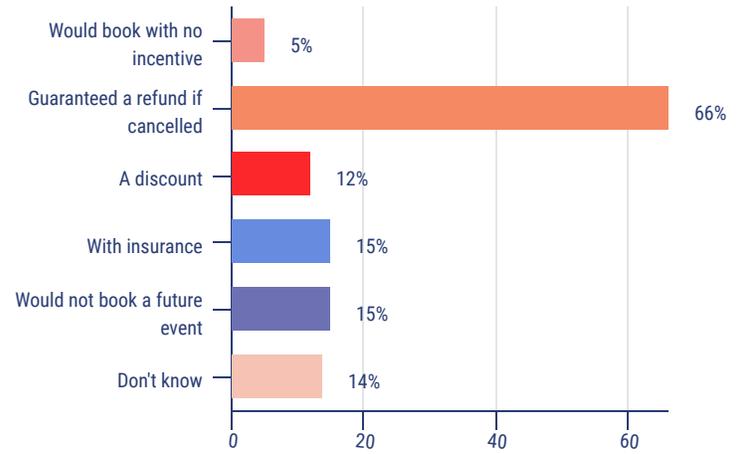
-  More experienced based activities - 11%
-  Sustainable/environmental aspects - 18%
-  Family/multi generational - 20%
-  Single person pursuits - 5%
-  Incorporate local produce/resources - 28%
-  Contain educational element - 7%
-  Spend more on upgrades/luxuries - 16%
-  Seek small capacity solutions - 27%
-  Don't foresee any changes - 43%

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Do you feel more inclined to plan leisure time in advance now?



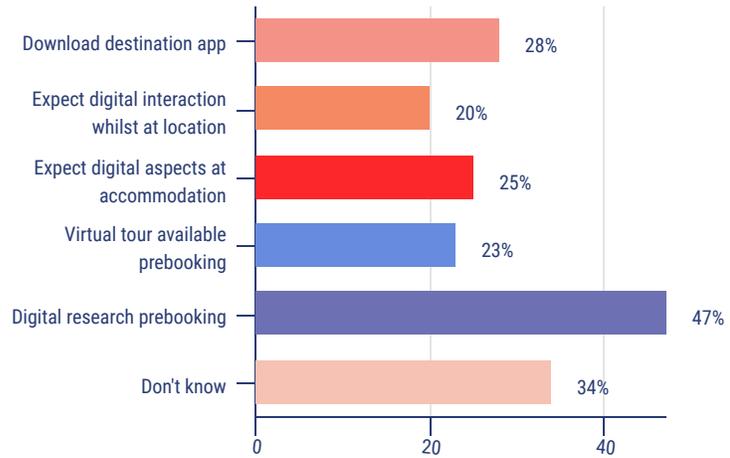
Confidence in booking future events with:



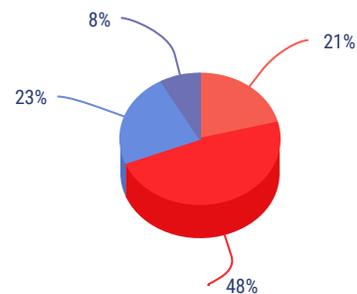
How would rate the following safety aspects for future visits:

	Not worried at all	Alert to risk	Extremely worried
Maintaining 2m social distancing - yourself/staff/others	10%	75%	15%
People management/Customer flow/Bottlenecks	5%	64%	31%
Cleanliness of toilet facilities	5%	56%	39%
Hygiene levels in food preparation and serving areas	7%	55%	39%
Staff maintaining hygiene levels	6%	54%	40%
Cleanliness of activities/exhibits	5%	62%	33%
Other visitors not taking appropriate precautions	4%	40%	56%
Staff not taking appropriate precautions	5%	52%	43%

Will you have the inclination to use technology more actively when making a leisure booking?



Would the introduction of a tourism industry 'Standard Mark' to identify safeguarding measures have been put in place influence your choice of booking?



● No - I expect safeguarding to be in place anyway
● Maybe - if choosing between two places
● Yes - I will only go to a place that has a 'Standard Mark'
● Don't know yet