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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2020 (Weeks 5 – 8)

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Mae’r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Introduction

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VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

The tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales residents to deliver robust weekly samples. The survey is repeated across a 13 week period with the first week commencing 18th May

The findings in this report are based on the second four weeks' worth of data. This is based on fieldwork taking place during the following dates:

15-19 June; 22-26 June; 29-3 July; 6-10 July

Definitions used within this report (1)

In this report we look at the profiles and attitudes of a number of separate audiences:

- **Wales Summer Intenders:** Members of the public who state their next U.K. holiday or short break will be in Wales and between July and September this year
- **Wales Winter Intenders:** Members of the public who state their next U.K. holiday or short break will be in Wales and from October 2020 to March 2021
- **Weeks 1 to 4**: Throughout the report, comparisons are made to the reporting that reflected the first four weeks of this research. The questionnaire and sample was identical to that used for this report (weeks 5 to 8) and reflects fieldwork conducted between 18th May and 12th June. The purpose of this comparison is to demonstrate how intentions and attitudes have changed over time, particularly in light of the lifting of restrictions in recent weeks.

To deliver clearer profiles, we also profile by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+.

Definitions used within this report (2)

For ease of analysis the following accommodation definitions are used:

- **Hotel/Motel/Inn**
- **Guest house/B&B/Farmhouse**
- **Commercial self-catering:** Rental holiday flat/apartment or Rented holiday home
- **Private home:** Second home/time share or Friends/relative's home or In someone else's private home on a commercial basis (e.g. Airbnb)
- **Caravan/Camping/Glamping:** Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- **Other accommodation:** Hostel or other type of accommodation

To enable analysis with robust base sizes, in some places destination types have been merged as follows

- **Wales Rural Destinations:** Countryside or village + mountains or hills
- **Wales Seaside Destinations**: Rural coastline + traditional seaside/coastal town

Definitions used within this report (3)

This report also includes five attitudinal segments produced to understand how audiences differ attitudinally in relation to COVID-19. These are defined below:

- **Anxious Appreciator Hermits:** Anxious about the virus, the handling of the situation and society's behaviour, but have valued the time at home. As such, they are likely to take longer to resume 'normal' behaviour. ‘Concerns about catching the virus’ and ‘It’s not responsible to travel’ are the biggest barriers to taking a U.K. summer holiday or short break.
- **COVID Impacted:** This segment is suffering financially and is also concerned about the ongoing health implications of the virus and the potential impact of the easing of lockdown. They give the lowest mood ratings of all the segments. ‘Concerns about catching COVID-19’ is the biggest barrier to taking a U.K. summer break, and the segment most likely to cite ‘personal finances’ as a barrier.
- **COVID Cautious:** While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour. Index high on ‘’it’s not responsible to travel’ and ‘restrictions on travel’.
- **Pragmatic Policy Supporters:** Concerned about the impact of COVID-19, but trusting and supportive of the authorities’ policies and most believe the worst is behind us. Most likely to cite ‘concerns about catching COVID-19’ as a barrier to taking domestic trips. Restrictions on travel also a factor.
- **Life Goes On:** Aching for lockdown to be lifted, this segment is not worried about the risks associated with COVID-19 and are supportive of lockdown lifting in order to protect the economy and get back to living their lives. Having ‘Opportunities to eat/drink out’ and ‘fewer things to do’ are the main barriers to taking a U.K. trip

Key findings

Key findings (1)

Key changes compared to the weeks 1 to 4 research

1. Comfort levels with ‘everyday’ leisure activity has increased significantly, particularly with ‘shopping in your local shopping centre’
2. 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
3. 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’
4. 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. This is more evident amongst U.K. residents than Wales residents, although more Wales residents are now ‘in the market’ having converted from ‘don’t know’ to ‘will take about the same number of U.K. trips’
5. The proportion of U.K. residents intending to take a domestic holiday this summer is significantly higher than in weeks 1 to 4, and marginally higher amongst Wales residents
6. Holiday *bookings* amongst intenders have increased significantly, but a majority are yet to book
7. The proportion of ‘older independents’ intending to take a trip to Wales this summer has increased, pre-nesters decreasing
8. A significantly higher proportion of Wales winter intenders indicate they are experiencing reduced income, half of whom belong to social grades AB
9. The intention to visit a ‘traditional coastal/seaside town’ on a summer trip to Wales is significantly higher (rising from 26% to 45%), whilst city or large town trips are lower. The changes in part reflect the movements in life stage representation.
10. Parties with ‘children, grandchildren or young adults with parents’ have higher representation in summer trips to Wales than in weeks 1 to 4
11. There has been a large rise in summer intenders planning on ‘caravan/camping accommodation’

Key findings (2)

General sentiment in the U.K. short break and holiday market

1. At the time of the survey between Mid June to Mid July, there remains caution around conducting leisure activity amongst U.K. and Wales residents. Although a majority regard themselves as comfortable ‘going for a walk in a country park/local trail’, only a minority feel comfortable doing activities like ‘shopping in your local shopping centre’, ‘eating at a restaurant’ and ‘travelling by public transport’. However, comfort with doing all of these activities is significantly higher than weeks 1 to 4, a positive sign for domestic tourism.
2. Caution is also reflected in holiday booking behaviour. As in weeks 1 to 4, only a minority feel confident they would be able to go on a U.K. holiday or short break in July or August this year, and whilst confidence rises for trips in September, the proportion confident remains below half. That said, confidence is higher than when the same questions were asked a month ago.
3. Families remain the most confident life stage, followed by pre-nesters and older independents. Although retirees are the least confident there is evidence that this is changing. They were the only life stage to exhibit a consistent rise in confidence across each of the summer months.
4. Amongst U.K. residents, the main barriers to confidence in taking domestic trips are now ‘catching COVID-19’ and ‘fewer opportunities to eat/drink out’ or ‘fewer things to do/places to visit’.
5. As in weeks 1 to 4, U.K. and Wales residents anticipate taking fewer domestic trips this year, although the net intention has increased in the last month.
6. Wales residents are significantly less confident and more cautious than U.K. residents, and are significantly more likely to cite government restrictions as the main reason for this.
7. 24% of U.K. residents are likely to go on a summer U.K. break this year, significantly more than in weeks 1 to 4, compared to 18% of Wales residents – a slight increase – meaning the gap between U.K. and Wales resident intentions has grown further.

Key findings (3)

Wales Visitor and trip profiles

1. Amongst U.K. residents planning a domestic holiday this summer (between July and September), Wales is the number five destination – the South West, Scotland and the North West the top three. Intention to visit both Wales and Scotland, have declined (although not significantly) since weeks 1 to 4, *perhaps* reflecting increased travel restrictions in these areas
2. Amongst Wales residents planning a trip this summer, Wales is the number one destination followed by South West England.
3. Residents of Wales, West Midlands and North West of England are most likely to take a short break or holiday in Wales this summer. There is also interest from around 1 in 10 of the highly populated South East and London regions, although Londoners are also most likely to be considering other destinations.
4. Around a third of people considering a trip to Wales are also considering taking a trip somewhere else in the U.K, Scotland, the South West and London are the three leading alternatives.
5. Wales is set to attract a range of visitor types this year. Families make up the largest life stage for trips to Wales in both the summer and winter months. The proportion of older-independent summer intenders has increased, which appears to have had an influence on destination and accommodation type.
6. Wales summer intenders are most likely to fall into the 'life goes on' attitudinal segment suggesting there will be an openness to conducting a range of activities on their trip.
7. North Wales remains popular for Wales summer and winter visitors living over the border in North West England, whilst West Wales is favoured by visitors living in Wales.
8. Wales intenders are planning to come to Wales for a range of holiday types, with 'traditional coastal/seaside town' by far the number one choice this summer. 'Countryside or village' and 'rural coastline' are the second and third preferred. 'Mountains or hills' are fourth but are significantly higher than summer trips to the U.K. on the whole.
9. Around 2 in 5 visitors to Wales in the summer are likely to travel with a child or a young adult. A notable 1 in 7 intend to visit with other members of the family suggesting that multi-generational trips may be a possibility.

Key findings (4)

Accommodation, Booking and Travel

1. Caravan/camping is the number one accommodation type amongst Wales summer intenders, increasing in preference since weeks 1 to 4. 'Private home' is the second most preferred accommodation type followed by 'commercial self-catering'. The rise in caravan/camping is driven by 'static caravans not owned by the respondent', suggesting that the opening of caravan parks has had an impact on the type of accommodation people are choosing.
2. Visitors to Wales in both the summer and winter are most likely to book their accommodation directly with a provider, but this is significantly more the case for the summer months. Online travel agent, a homestay website and the website of a traditional travel agent are the next preferred channels. However, this varies considerably by life stage, highlighting the need for accommodation providers to offer a range of booking options.
3. 3 in 5 of people intending to visit Wales in the summer expect their trip to be a holiday of 4+ nights compared to just over two fifths expecting it to be a short break. Wales is set to generate more trips of 4+ nights this summer than any other U.K. region. In the winter months, the majority of trips are expected to be short breaks.

Key findings (5)

Visitor Spending

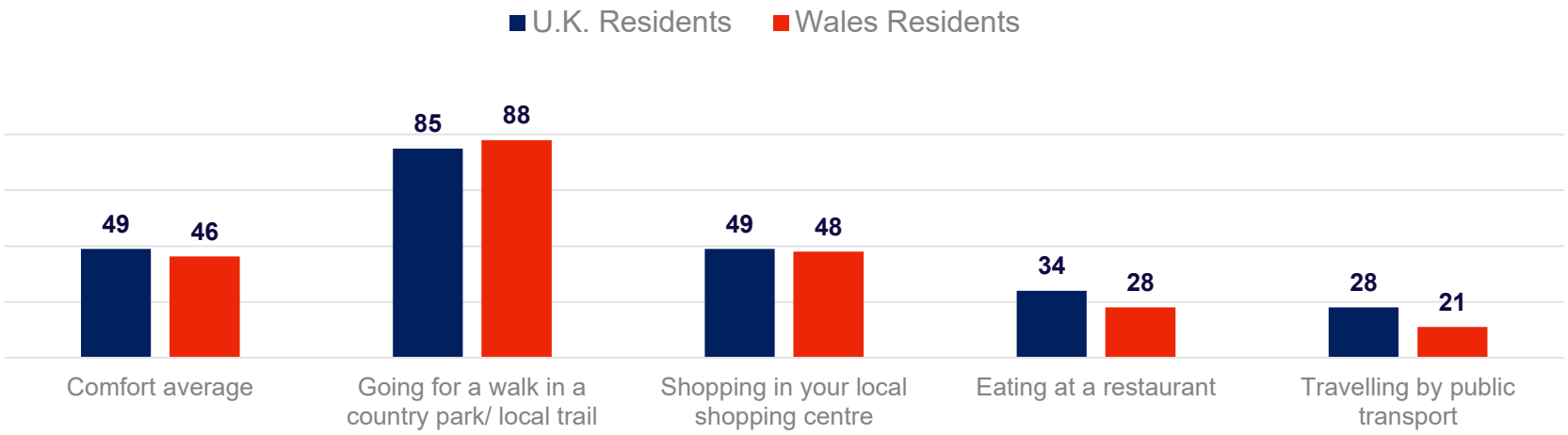
1. The anticipated spend for Wales trips this summer is £670 per party, slightly lower than the U.K. average (£676). On a 'per night' basis, the spend is likely to be significantly lower than the U.K. average, as Wales intenders are more likely to stay for 4+ nights. Anticipated spend on Wales holidays and short breaks is higher in the summer than in the winter months, perhaps reflecting fewer longer holidays and the high proportion of winter intenders reporting reduced income as a result of COVID-19.
2. The slightly lower anticipated spend compared to other U.K. regions may reflect the intention to visit rural and seaside destinations, use of private homes and caravan and camping, with Wales offering a relatively affordable option for many budget-conscious travellers.
3. Compared to weeks 1 to 4, there is a higher incidence of summer intenders stating 'things are ok but I have to be careful' financially (38% compared to 34%) and fewer saying 'I'm better off than before'. A higher proportion of summer intenders describe themselves as on 'a reduced income' (18% compared to 13%).
4. Trip spend is estimated to be lower in Wales in the winter period, perhaps reflecting the shorter trip length and the high proportion of winter intenders on a 'reduced income'. Combined with increased financial caution amongst summer intenders, good value trips are likely to appeal. That said, with increasing confidence amongst retirees, for whom 'personal finances' are not a barrier to booking a domestic trip, there is potential to appeal to this audience at 'standard' price points.

Profiling the short break and holiday market

Level of comfort undertaking activities with a ‘comfort average’

- Wales residents feel significantly more comfortable conducting ‘everyday activities’ than in weeks 1 to 4 – the average ‘comfort score’ rising from 39% to 46%. Although comfort has risen with all activities, the rise is biggest in ‘shopping in your local shopping centre’ (rising from 35% to 48%)
- Overall, U.K. residents feel more comfortable than Wales residents, most evident in indoor activities such as ‘eating at a restaurant’ and ‘travelling by public transport’.

Figure 1. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Percent, Weeks 5 to 8, U.K. and Wales

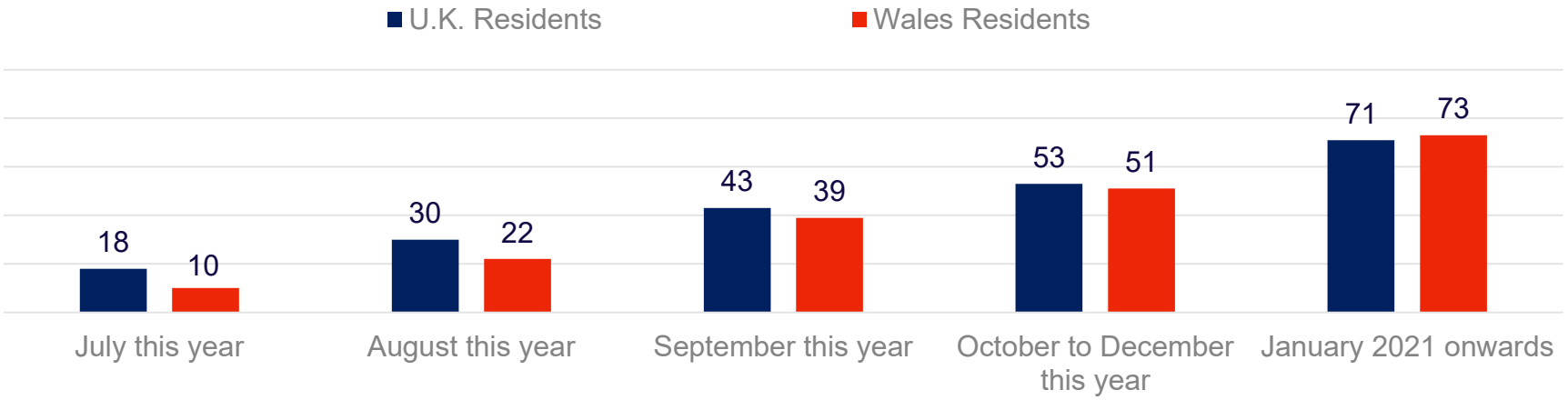


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. residents n=6,993; All Wales residents n=818

Confidence in the ability to take a U.K. short break or holiday

- Only a minority of Wales residents would feel confident taking a U.K. holiday or short break in July, August or September this year. However, confidence in each time period is significantly higher than in weeks 1 to 4, particularly August and September.
- Wales residents remain significantly less confident than U.K. residents, particularly in the near-term summer months. The gap in confidence in July has grown since weeks 1 to 4.

Figure 2. Confidence in taking a U.K. short break or holiday across a range of different months, Net percentage very and fairly confident, Weeks 5 to 8, U.K. and Wales

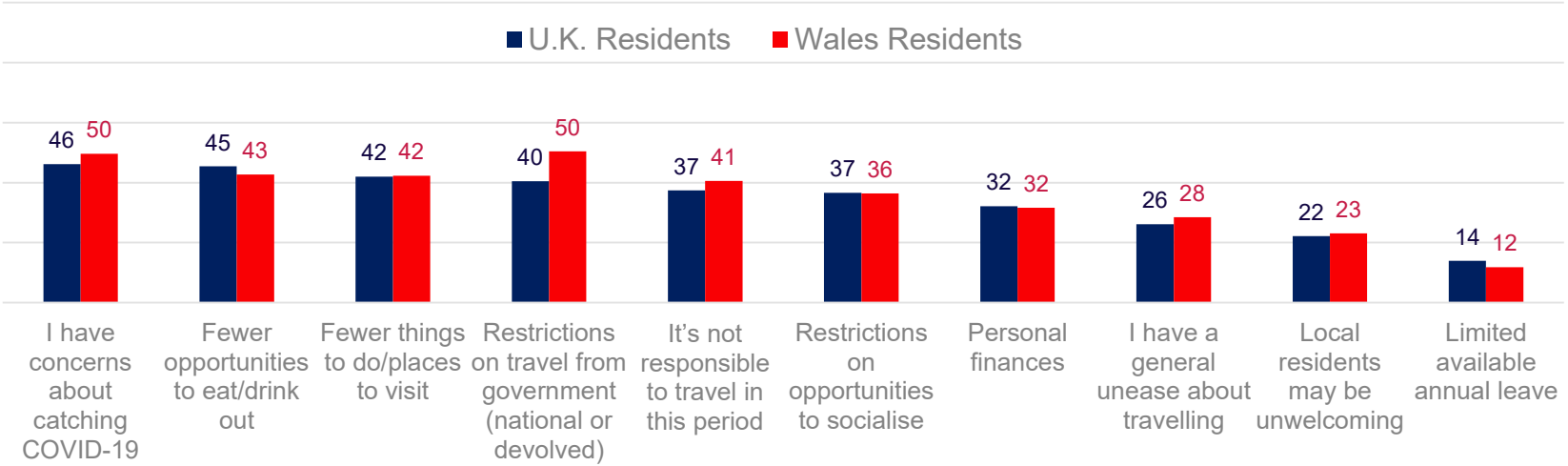


QVB7a. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All U.K. residents n=6,993; All Wales residents n=818

Reasons for not feeling confident taking summer trips in the U.K.

- The reasons for 'not being confident' about taking a domestic holiday or short break differ between U.K. and Wales residents. Wales residents are significantly more likely than U.K. residents to cite 'restrictions on travel from government', perhaps reflecting different timings in lockdown restrictions being lifted. Wales residents are also more likely to cite 'concerns about catching COVID-19' and 'it's not responsible to travel in this period'.

Figure 3. Reasons for not being confident about travelling between July to September, Percentage, Weeks 5 to 8, U.K. and Wales

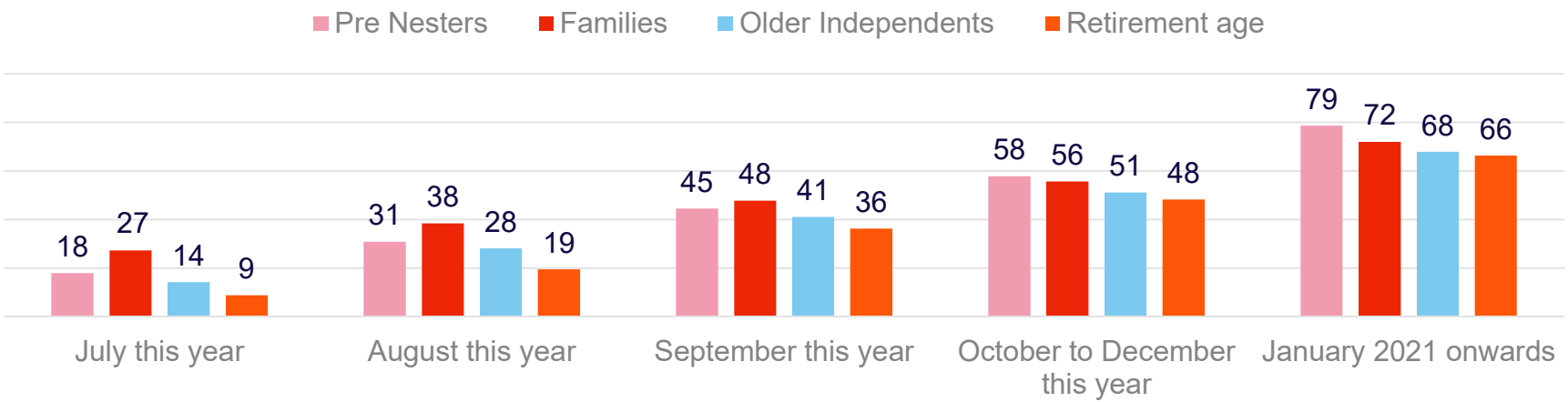


QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday between July and September? Base: U.K. residents n=4133; Wales residents n=504

Confidence to take U.K. short break or holiday – by life stage

- Compared to weeks 1 to 4, all life stages exhibit higher levels of confidence in taking trips in July and August this year.
- Families have the highest confidence in taking summer trips, pre-nesters becoming the most confident in the winter months
- Older Independents exhibit similar (albeit marginally lower) confidence in taking trips to pre-nesters, with confidence amongst 'retirees' the lowest.
- Despite having the lowest confidence, retirees are the only life stage to exhibit consistent rises in confidence for July, August *and* September.

Figure 4. Confidence in taking a U.K. short break or holiday across a range of different months by life stage. Net percentage very and fairly confident, Weeks 5 to 8, U.K.

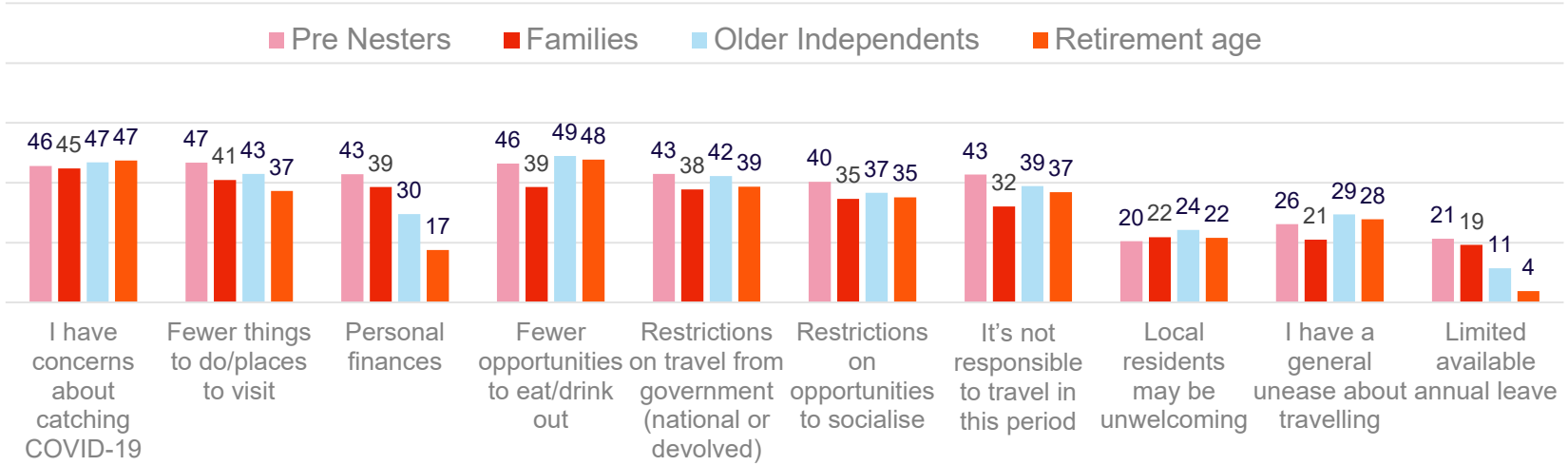


QVB7a. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Base: Pre-nesters n=1618, Families n=2131, Older Independents n=2030, Retirement Age n=1214

Reasons for not feeling confident about taking trips in the U.K. between July and September – by life stage

- There are varying reasons different life stages would not be confident about taking a U.K. trip between July and September. Concerns about catching COVID-19 are a barrier for all life stages. 'Fewer things to do/places to visit' and 'fewer opportunities to eat/drink out' are a notable barrier for pre-nesters and families. 'Personal finances' is also a key barrier for these two life stages, suggesting that good value trips will be important. Notably, 'retirees' are the least likely to cite 'personal finances' as a barrier to travel, 'fewer opportunities to eat/drink out' the most important. This suggests that as restrictions are lifted and the economic situation becomes challenging, retirees may offer the biggest growth opportunity for the tourism industry

Figure 5. Reasons for not being confident about travelling between July to September by life stage, Percentage, Weeks 5 to 8, U.K.



QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday?
Base: U.K. Pre-nesters n=1273, Families n=1170, Older Independents n=1188, Retirement Age n=722

Anticipated number of U.K. trips this year compared to normal

- Both U.K. and Wales residents anticipate a 'net decrease' in U.K. short breaks and holidays this year. Amongst U.K. residents, expectations have improved since weeks 1 to 4. They now have a net intention of -22 more short breaks (compared to -28 in weeks 1 to 4) and -26 for holidays of 4+ nights (-30 in weeks 1 to 4).
- The net figure amongst Wales residents remains largely unchanged, although more now consider themselves 'in the market', with 'don't knows' converting to 'about the same'.

Figure 6. Number of U.K. short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 5 to 8 , U.K. and Wales

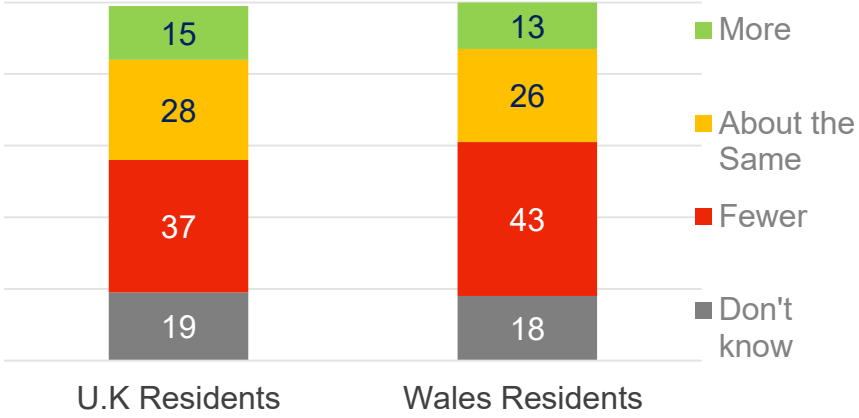


Figure 7. Number of U.K. holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 5 to 8, U.K. and Wales

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of U.K. holidays/short breaks between now and the end of the year?
Base: All U.K. residents n=6,993; All Wales residents n=818

Anticipated number of Overseas trips this year compared to normal

- As in weeks 1 to 4, U.K. and Wales residents also anticipate a large 'net decrease' in short breaks and holidays *overseas* this year. The net decline in overseas trips is significantly larger than the net decline in anticipated U.K. trips.
- As with domestic trips, a notable proportion of Wales residents have converted from 'don't knows', although for overseas the conversion is to taking 'fewer' trips.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 5 to 8 , U.K. and Wales

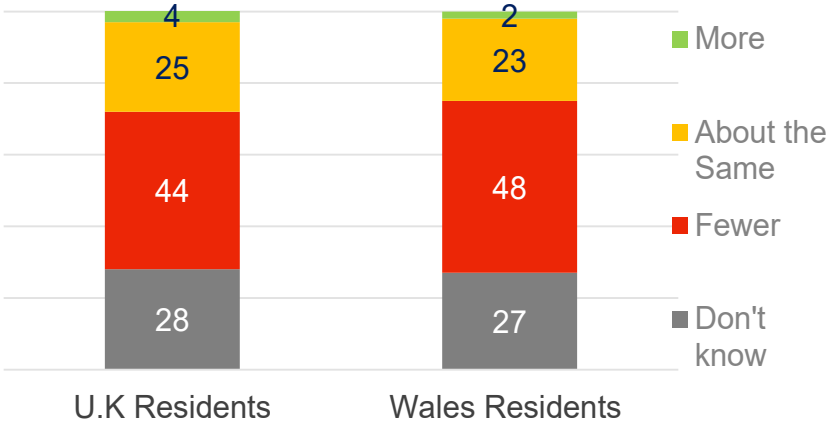
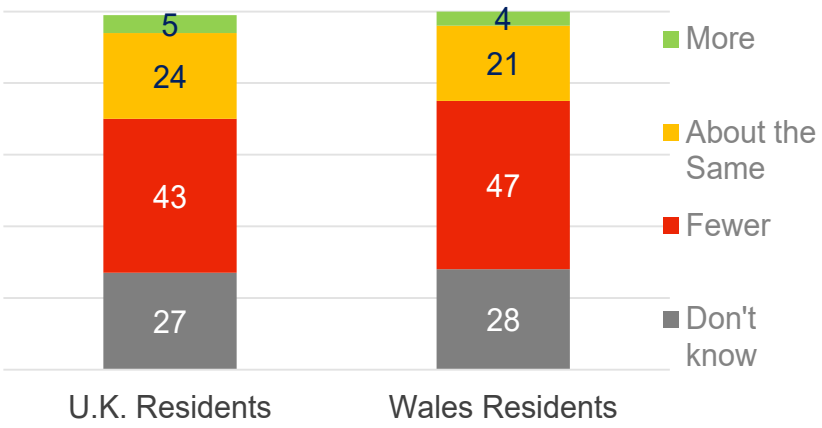


Figure 9. Number of OVERSEAS holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 5 to 8, U.K. and Wales



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of U.K. holidays/short breaks between now and the end of the year?
Base: All U.K. residents n=6,993; All Wales residents n=818

When anticipating going on next U.K. short break or holiday

- 24% of U.K. residents intend to take a domestic short break or holiday this summer (between July and September), significantly higher than the proportion who intended to do so in weeks 1 to 4. The proportion of Wales residents intending to take a summer break has also increased although only marginally, meaning there is now a six percentage point gap with the wider U.K. population. Intentions amongst Wales residents are lower than any other U.K. government region.
- 19% of Wales residents intend to take their next U.K. holiday or short break this winter (between October 2020 and March 2021), also lower than the proportion of U.K. residents intending to do so.
- Wales residents are significantly more likely than U.K. residents to state they 'don't know but would like to' suggesting the potential to close these gaps.

Figure 10. When anticipate GOING on next U.K. trip, Percentage Weeks 5 to 8, U.K. and Wales

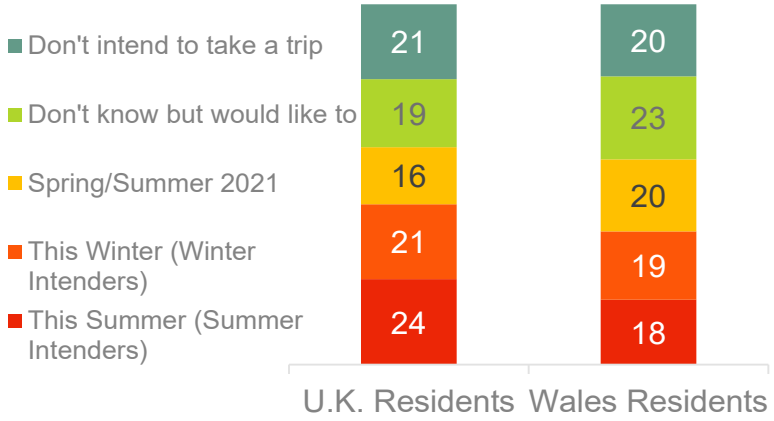
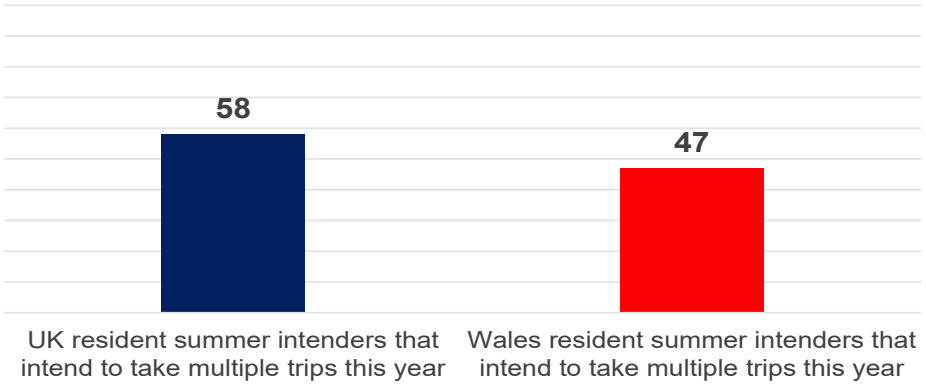


Figure 11. Proportion of summer intenders intending to take more than one trip this year, Percentage, Weeks 5 to 8, U.K.



QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Weeks 5 to 8 U.K. population n=6,993; Wales population n=818

Whether planned or booked U.K. holiday or short break*

- Under a third of UK residents intending to take a domestic trip this summer have booked, so there remains a major opportunity for destinations to secure bookings.
- Wales Intenders are slightly less likely than U.K. Intenders to have already planned or already booked their next U.K. short break or holiday, both in the summer and the winter months.

Figure 12. Proportion of Intenders that have already *planned* their trip , Percentage Weeks 5 to 8, U.K. and Wales

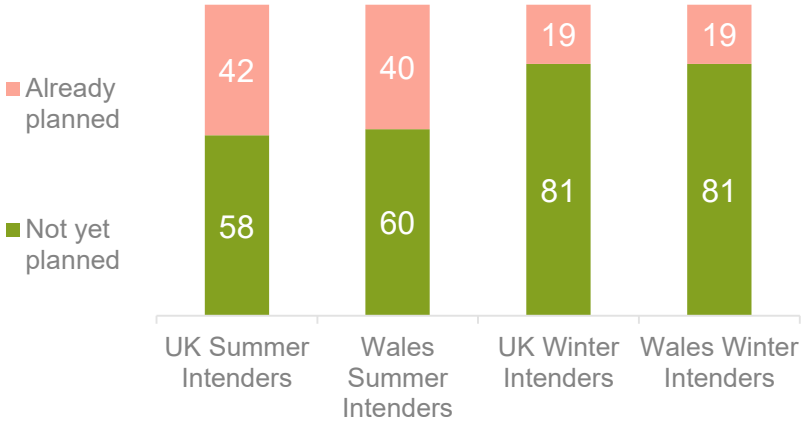
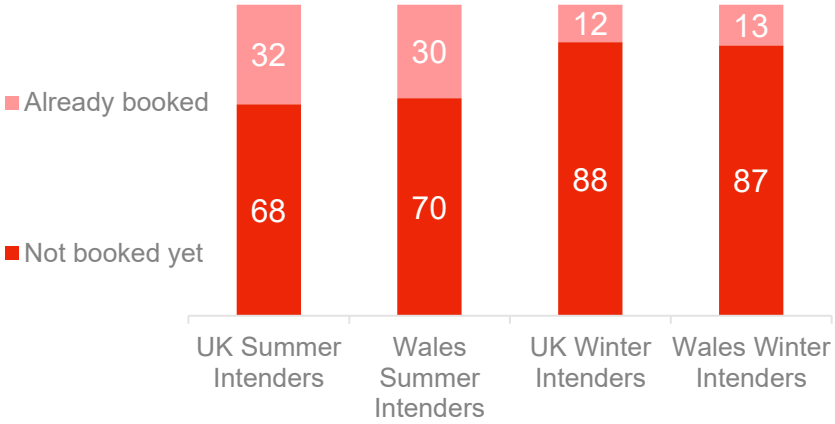


Figure 13. Proportion of Intenders that have already *booked* their trip , Percentage Weeks 5 to 8, U.K. and Wales

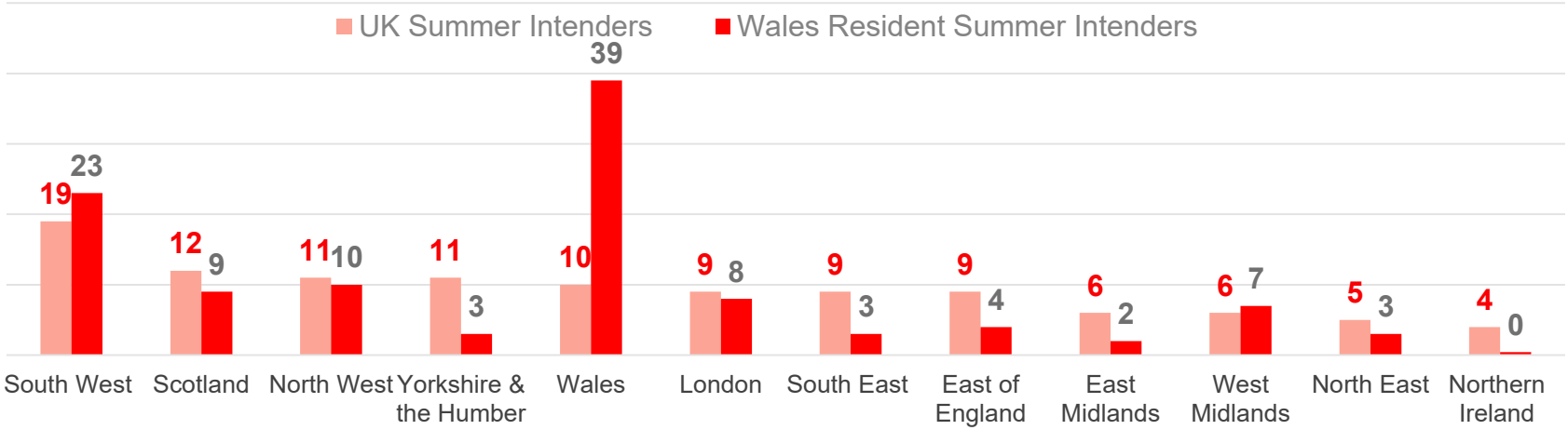


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Weeks 5 to 8 U.K. summer intenders n=1,598 ;Wales Inclusive summer intenders n=184 ; U.K. winter intenders n=1598; Wales Inclusive winter intenders n=133

Where planning on staying on next U.K. *summer* trip

- 10% of U.K. summer intenders plan on going to Wales for their next U.K. short break or holiday, the fifth most preferred U.K. region. As in weeks 1 to 4, the South West remains the leading choice, followed by Scotland. Intention to visit both Wales and Scotland, have declined (although not significantly) since weeks 1 to 4.
- Amongst Wales residents, Wales is the number one preferred destination, 39% planning to take a trip there, a large rise on weeks 1 to 4 when 31% intended to do so.

Figure 14. Where planning on staying on next U.K. overnight trip for summer intenders , Percentage Weeks 5 to 8, U.K. and Wales Residents

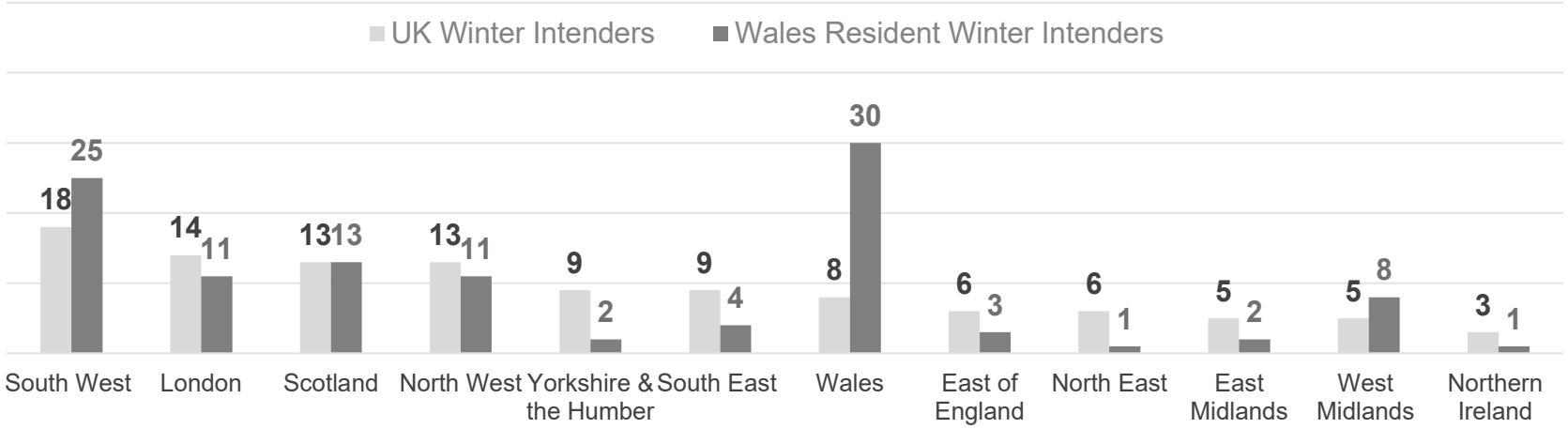


QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the U.K. between summer U.K. Intenders n=1,598, Summer Wales Resident Intenders n=151

Where planning on staying on next U.K. *winter* short break or holiday

- 8% of U.K. winter intenders are likely to stay in Wales, making it the 7th most preferred destination.
- As in the summer months, Wales is the number one preferred winter destination for Wales residents, again followed by the South West of England.

Figure 15. Where planning on staying on next U.K. overnight for winter intenders, Percentage, Weeks 5 to 8, U.K. and Wales



QVB4a. Where in the U.K. are you likely to stay on this next trip?
Base: All respondents planning on taking a holiday or short break in the U.K. winter U.K. Intenders n=1,442 winter Wales Resident Intenders n=148

Destination consideration amongst Wales intenders

- 3 in 10 Wales summer and winter intenders are also considering other U.K. destinations for their next domestic break – Scotland and the South West the two leading alternative choices. With a majority having not yet booked their trips, this highlights the need to reassure intenders that their trips will be able to go ahead.
- Intenders with a likelihood of switching destination are more likely than 'pre-nesters', 'older independents' and living in London.

Figure 16. Consideration of Wales and other places, Percentage Weeks 5-8, U.K. and Wales

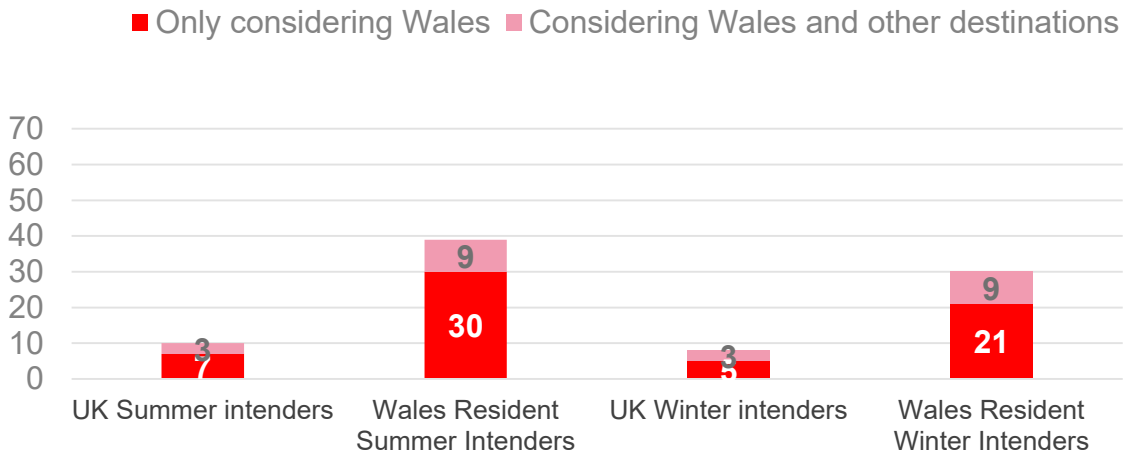


Table 1. Top 5 alternative destinations for Wales intenders

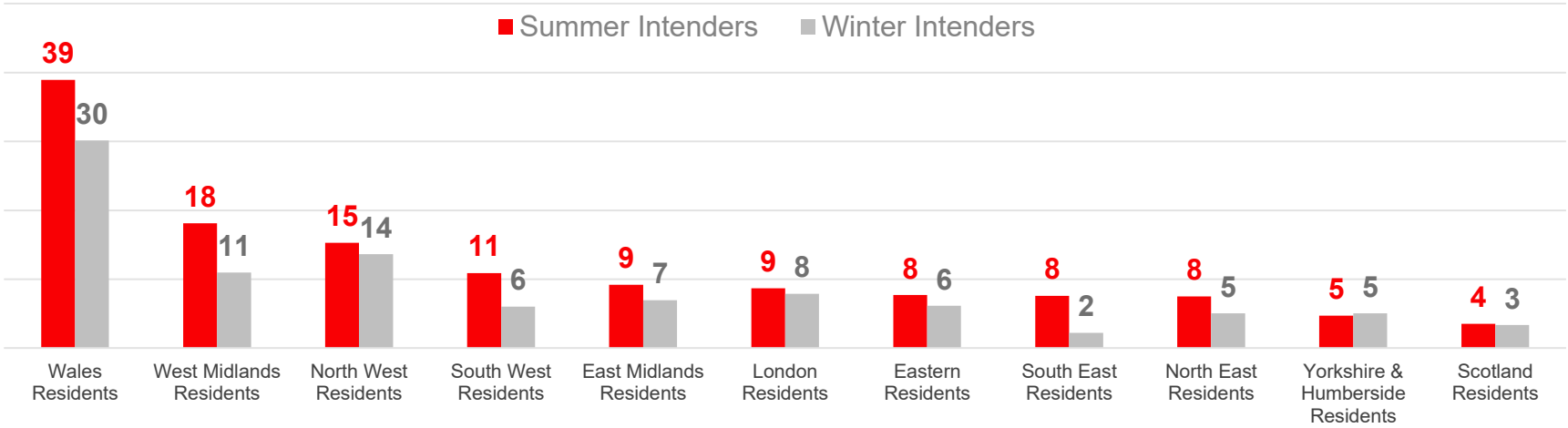
	Wales Summers Intenders	Wales Winter intenders
Scotland	13%	14%
South West	13%	19%
London	8%	6%
West Midlands	8%	7%
Yorkshire	8%	4%

QVB4a. Where in the U.K. are you likely to stay on this next trip?
Base: All respondents planning on taking a holiday or short break in the U.K. between summer U.K. Intenders n=1,598, Summer Wales Resident Intenders n=151

Intentions to stay in Wales by region of residence

- As in weeks 1 to 4, residents of Wales, the West Midlands and the North West of England are the most likely to be considering a summer holiday or short break in Wales this year. Around 1 in 10 residents in highly populated areas such as the South East and London are also considering a summer trip to Wales.
- In the winter months the pattern is relatively similar.

Figure 17. Proportion of intenders planning on staying in Wales on next U.K. holiday or short break by region of residence, Percentage Weeks 5 to 8, U.K. and Wales



QVB4b. Where in the U.K. do you expect to be staying on this next holiday or short break? Where do you live?
Base: All residents planning on taking a holiday or short break in the U.K. between July-Sept/Oct-March. All n=1,598/1,442 residents in each region

Demographics of intenders compared to the general population

- As in weeks 1 to 4, families make up the largest life stage for trips to Wales in both the summer and winter months. Also similar to weeks 1 to 4, retirees over-index against the population for summer trips, but under-index for winter trips. Representation of older-independent summer intenders has increased since weeks 1 to 4, at the expense of pre-nesters which has declined.
- Pre-nesters are a more important source of potential visitors to Wales in the winter
- Similar to weeks 1 to 4, social grades C1C2 make up the bulk of Wales summer intenders, indexing higher than both the U.K. population, and U.K. summer intenders. In the winter months, social grades AB make up over a third of Wales intenders, significantly higher than their representation in the U.K. population.

Figure 18. Breakdown of populations and intenders by life stage, Percentage Weeks 5 to 8, U.K. and Wales

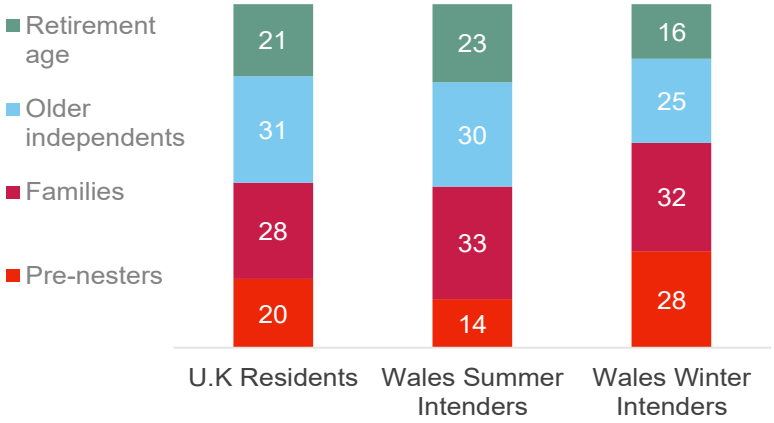
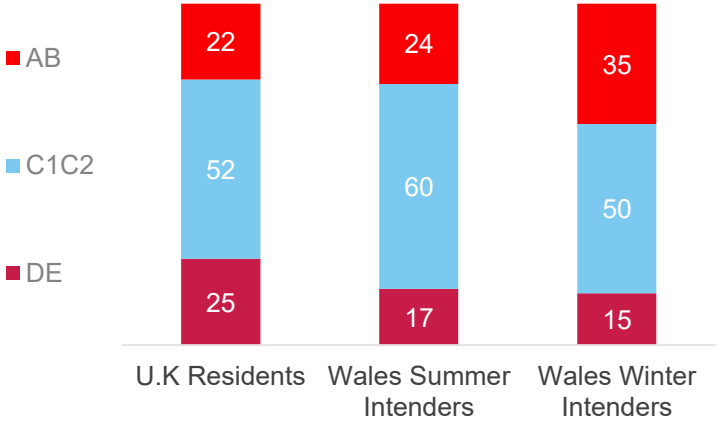


Figure 19. Breakdown of populations and intenders by social grade, Percentage Weeks 5 to 8, U.K. and Wales



Source: Wales winter iDemographic questions. Base: All respondents. U.K. population n=6993; Wales summer intenders Inclusive n=184; ntenders Inclusive n=133

Life stage and social grade combined

- Notably, all C1C2 life stages index higher amongst Wales summer intenders than they do in the U.K. population, although this is most obvious amongst families and retirees.
- In the winter months, AB pre-nesters and AB families have the highest representation relative to the population.

Table 2. Life stage and social grade combined, Percentage, Weeks 5 to 8, U.K.

	U.K. Population	Wales summer intenders	Wales winter intenders
Pre-nesters – AB	4%	1%	8%
Pre-nesters - C1C2	11%	12%	16%
Pre-nesters – DE	5%	1%	4%
Families – AB	10%	13%	18%
Families - C1C2	15%	18%	11%
Families – DE	3%	2%	3%
Older Independents – AB	6%	6%	5%
Older Independents - C1C2	19%	20%	16%
Older Independents – DE	6%	4%	4%
Retirement age – AB	3%	3%	4%
Retirement age - C1C2	7%	10%	7%
Retirement age - DE	11%	9%	5%

Source: Demographic questions. Base: All respondents. U.K. population n=6993; Wales summer intenders Inclusive n=184; Wales winter intenders Inclusive n=133

Financial segments and financial impact of COVID-19 on intenders

- Wales intenders' financial impact as a result of COVID-19 is relatively consistent with the experience of the U.K. population. However, compared to weeks 1 to 4, there is a higher incidence of summer intenders stating 'things are ok but I have to be careful' (38% compared to 34%) and fewer saying 'I'm better off than before'. In line with this increase in financial caution, a higher proportion of summer intenders describe themselves as on 'a reduced income' (18% compared to 13%).
- There has been a significant rise in the proportion of Wales *winter* intenders stating they are on a reduced income (36% compared to 20% in weeks 1 to 4), suggesting that 'financial concerns' may be a reason that they are not committing to a summer trip this year. However, over half of this audience belong to social grades AB, implying that they may have the finances to fund some sort of a trip and 'budget trips' may not be their preferred choice.

Figure 20. Breakdown of intenders by financial segments, Percentage Weeks 5 to 8, U.K. and Wales

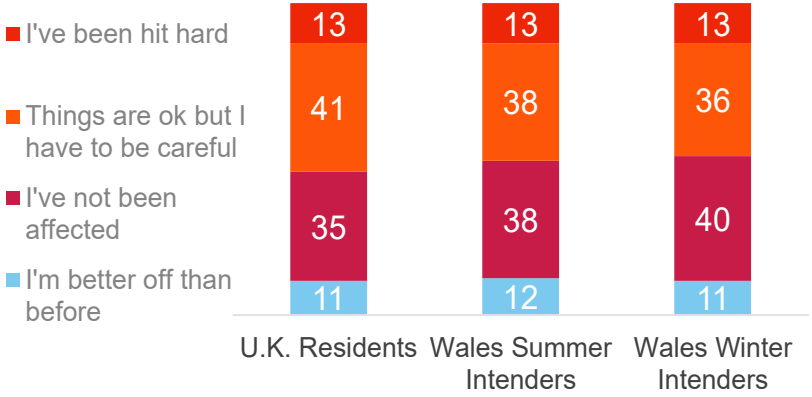
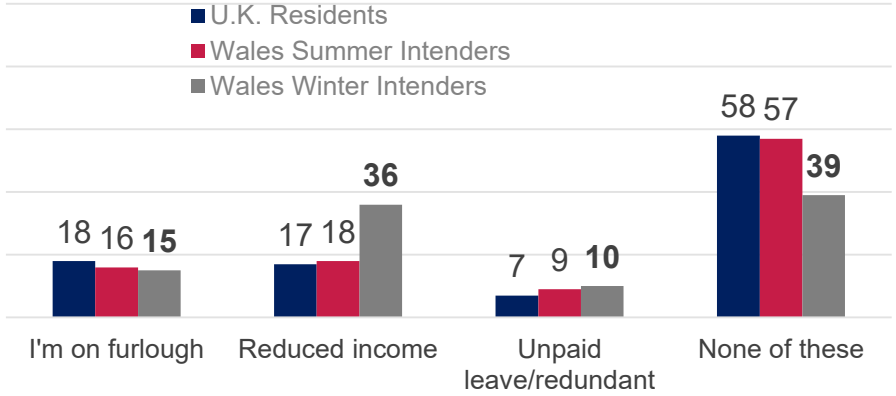


Figure 21. Employment impact on intenders, Percentage Weeks 5 to 8, U.K. and Wales

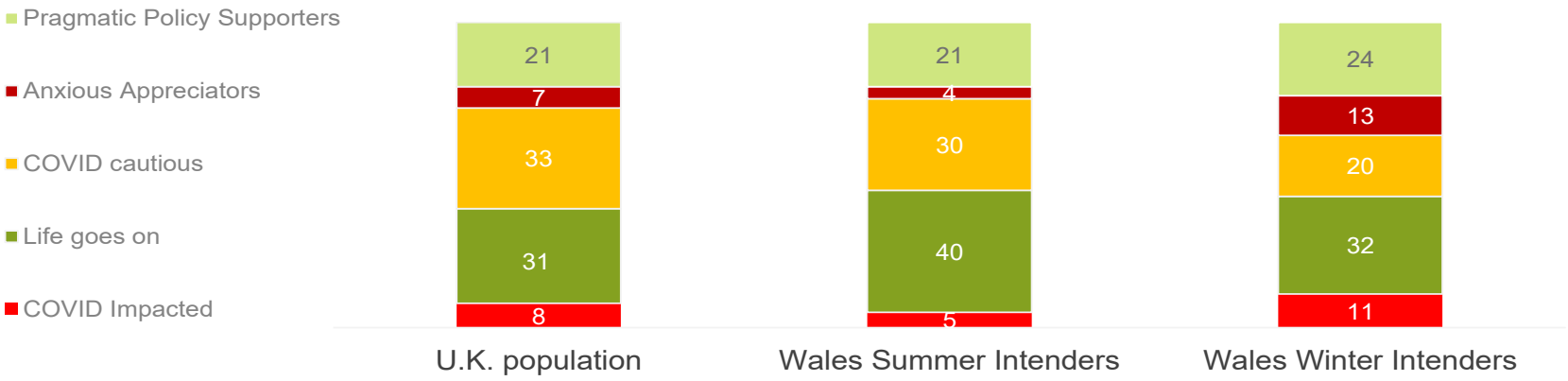


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders Inclusive n=184; Wales winter intenders Inclusive n=133

Attitudinal segments (see definitions page for more information)

- The ‘life goes on’ attitudinal segment makes up 2 in 5 of Wales Summer intenders, and a third of Wales Winter Intenders.
- ‘Pragmatic Supporters’ and ‘Covid Cautious’ groups make up the majority of remaining intended visitors to Wales and are likely to be cautious in their holiday taking behaviours.
- The “Anxious Appreciators” and “COVID Impact “ segments are unsurprisingly less likely to be intending to take a trip to Wales

Figure 22. Breakdown of attitudinal segments by life stage, Percentage Weeks 5-8, U.K.



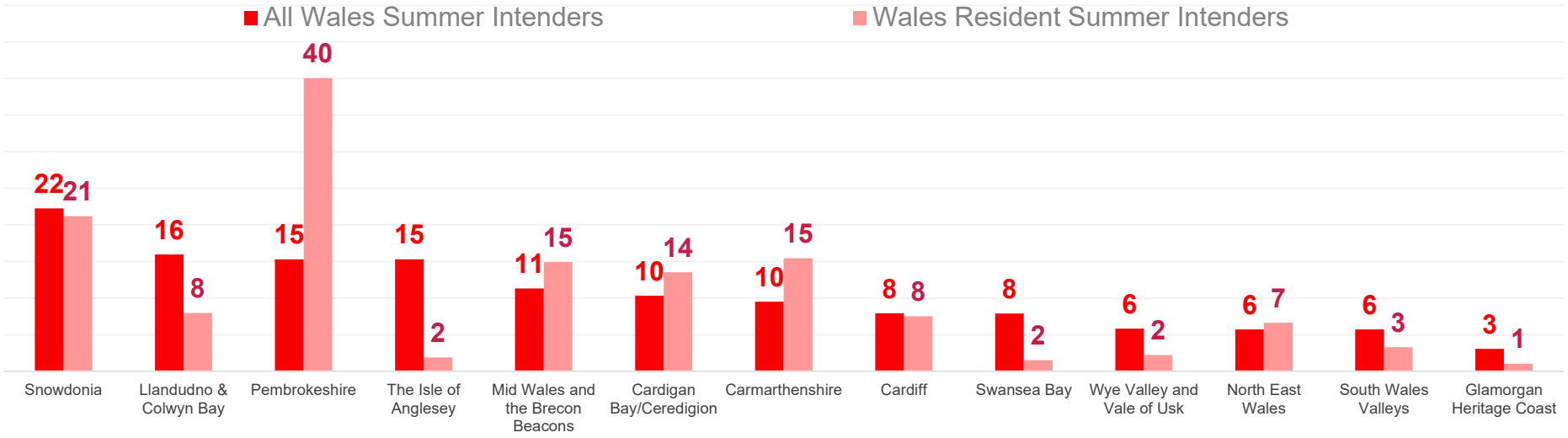
Base: All respondents weeks 7-8. Wales Summer Intenders n=89; Wales Winter Intenders n=62

Trip behaviour

Where planning on staying in Wales on next Wales summer trip

- As in weeks 1 to 4, there are some notable differences in where Welsh residents and people from throughout the U.K. intend to visit on their trip to Wales.
- Snowdonia is the most popular destination for all Wales summer intenders, followed by Llandudno and Colwyn Bay, Anglesey, and Pembrokeshire.
- Amongst Wales residents planning on a summer trip in Wales, Pembrokeshire is by far the most popular destination, attracting around double the proportion of visitors to the next most popular (Snowdonia).

Figure 23. Planned destination for next Wales trip for summer intenders , Percentage Weeks 5 to 8, U.K. and Wales

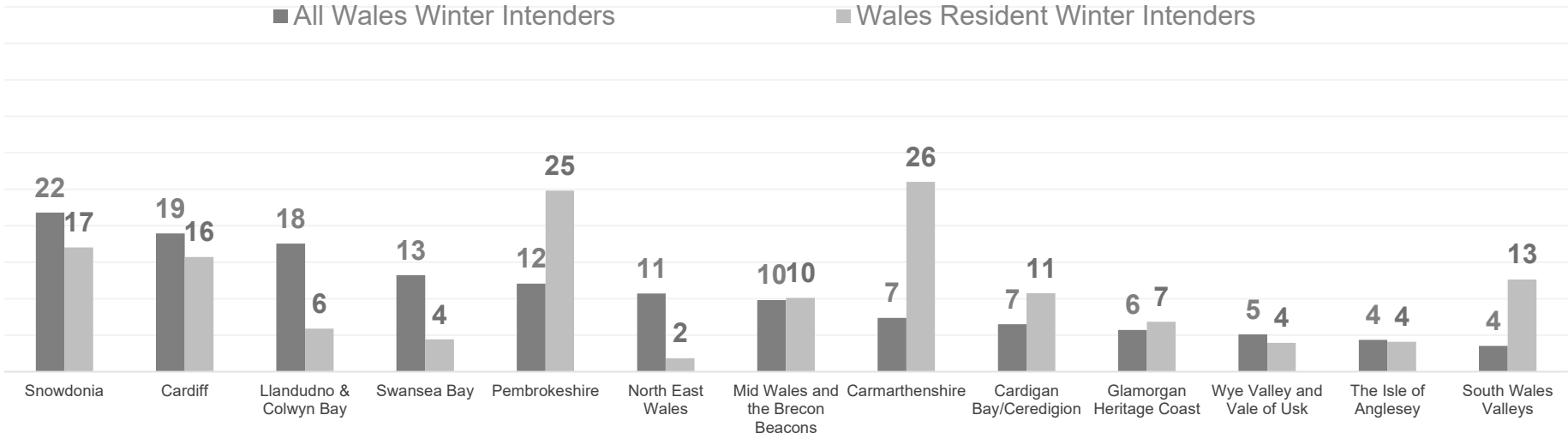


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales. All Wales summer intenders n=184; Wales Resident summer intenders n=60

Where planning on staying in Wales on next Wales winter trip

- Consistent with weeks 1 to 4, Snowdonia is also the most popular destination for a trip in the winter months. Cardiff is the second preferred destination (significantly higher in preference than weeks 1 to 4) followed by Llandudno & Colwyn Bay. Amongst Wales residents, Carmarthenshire and Pembrokeshire are the two preferred Winter destinations.

Figure 24. Planned destination for next Wales trip for winter intenders, Percentage, Weeks 5 to 8, U.K. and Wales

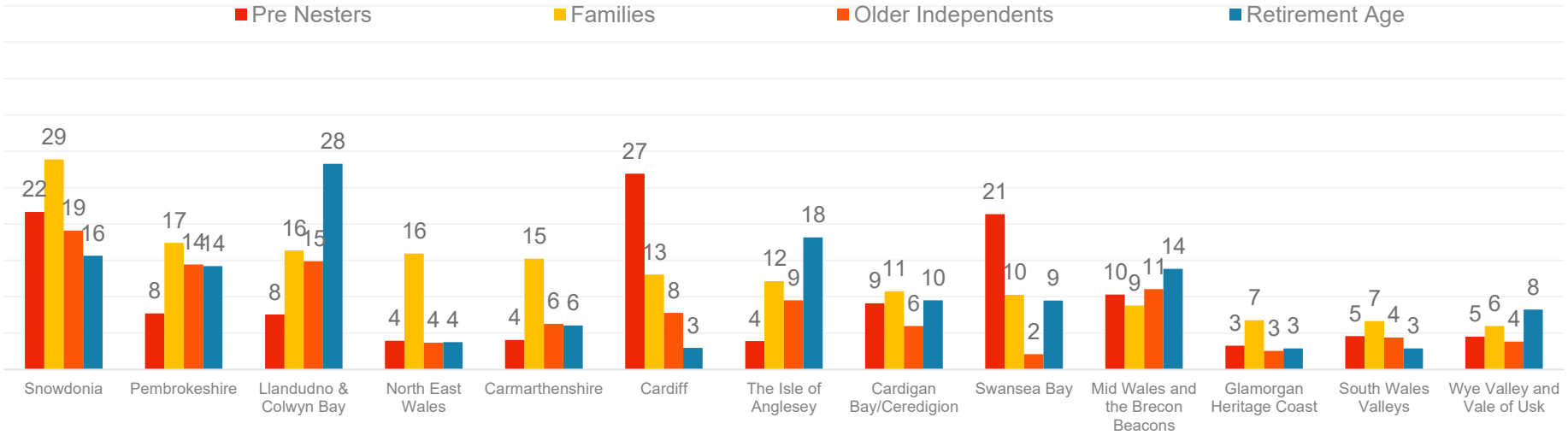


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales. All Wales winter intenders n=133; Wales Resident winter intenders n=48* *Base sizes small – treat indicatively only

Where planning on staying in Wales on next Wales summer or winter short break or holiday - by life stage

- There are variations in destinations planned to visit in Wales by different life-stage groups.
- Pre-nesters are most likely to state they are intending to go to Snowdonia, Cardiff and Swansea Bay; Families most likely to visit Snowdonia and Pembrokeshire; Older Independents - Snowdonia, Llandudno and Colwyn Bay and Pembrokeshire; Retirement Age are most likely to visit Llandudno and Colwyn Bay, Anglesey and Snowdonia.

Figure 25. Planned destination for next Wales trip for all intenders by life stage, Percentage, Weeks 5 to 8, U.K. and Wales, Ranked on families

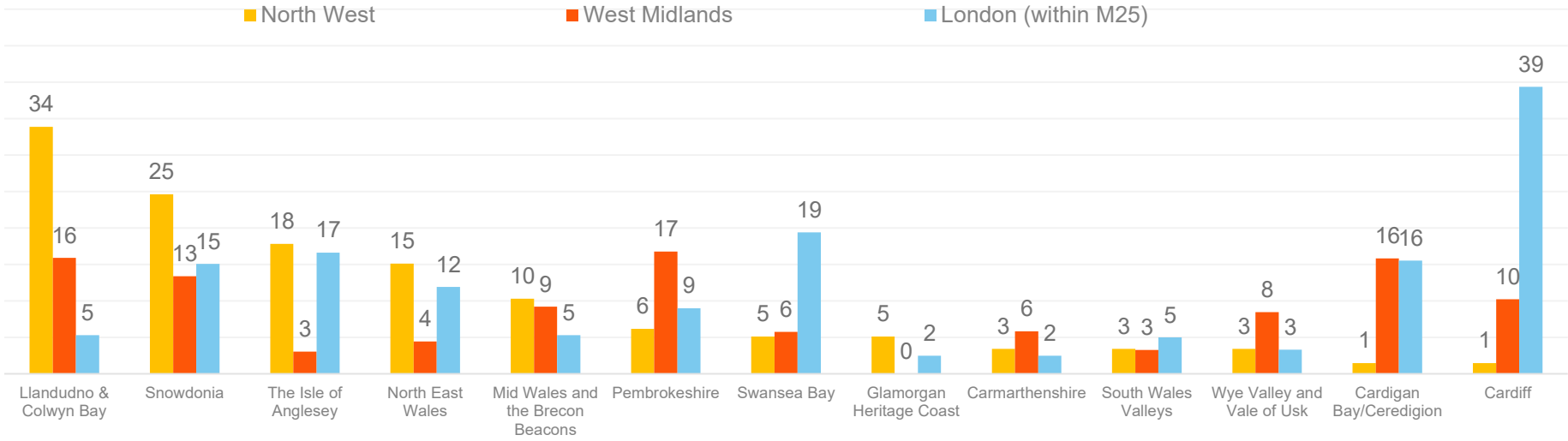


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021 Pre-nesters n=72; Families n=113; Older Independents n=87; Retirement Age n=45

Where planning on staying in Wales on next Wales summer or winter short break or holiday – by region of residence

- The part of Wales that visitors are likely to visit broadly reflects their region of origin. Intenders from the North West of England are most likely to visit North Wales destinations such as Llandudno & Colywn Bay, Snowdonia, Anglesey and North East Wales.
- Intenders from the West Midlands are likely to visit a range of destinations across Wales, reflecting their broad access points.
- Residents of London are most likely to visit Cardiff, although otherwise visit a mix of North, South and West Wales destinations - Swansea Bay, Ceredigion, Snowdonia and Anglesey each featuring in their top four.

Figure 26. Planned destination for next Wales trip for all intenders by key regions, Percentage, Weeks 5 to 8, U.K. and Wales, Ranked on North West



QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021
West Midlands n=40*; North West n=44*; London n=36*. *Base sizes very small. Use indicatively only

Type of destination for next U.K. short break or holiday

- Visitors to Wales in the summer months are most likely to visit a 'traditional coastal/seaside town'. At 45%, the proportion anticipating visiting this type of destination is significantly higher than in weeks 1 to 4 of the research when 26% intended to do so.
- Countryside or villages, rural coastline, and mountains and hills are also popular options amongst potential summer visitors.
- In the winter months, trips to 'countryside or village' and cities or large towns are relatively more popular, although there is also interest in seaside and mountain areas.
- The changes in destination type across both seasons will be driven in part by the changing make-up of life stage amongst intenders, in particular the fluctuating proportions of older independents and pre-nesters compared to the last wave of research.

Figure 27. Main type of destination for Wales summer intenders, Percentage Weeks 5 to 8, U.K.

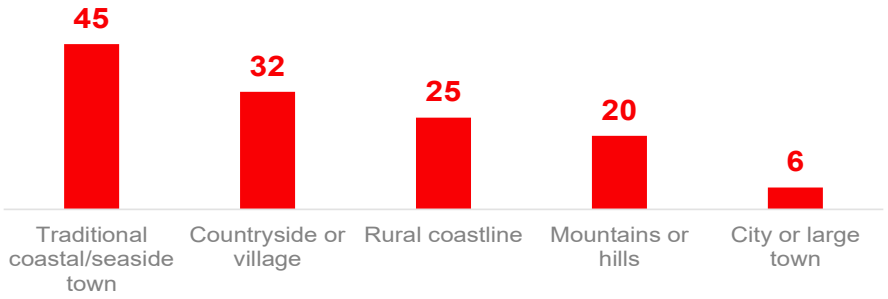
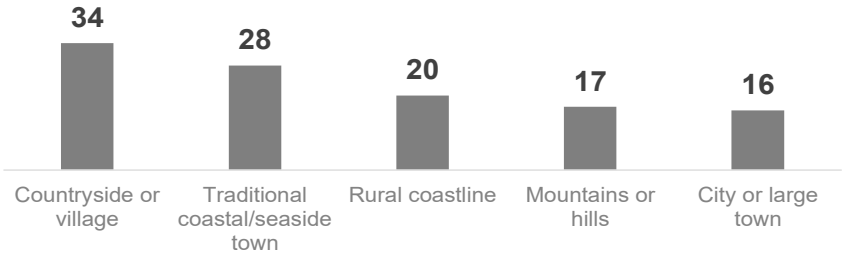


Figure 28. Main type of destination for Wales winter intenders, Percentage Weeks 5 to 8, U.K.

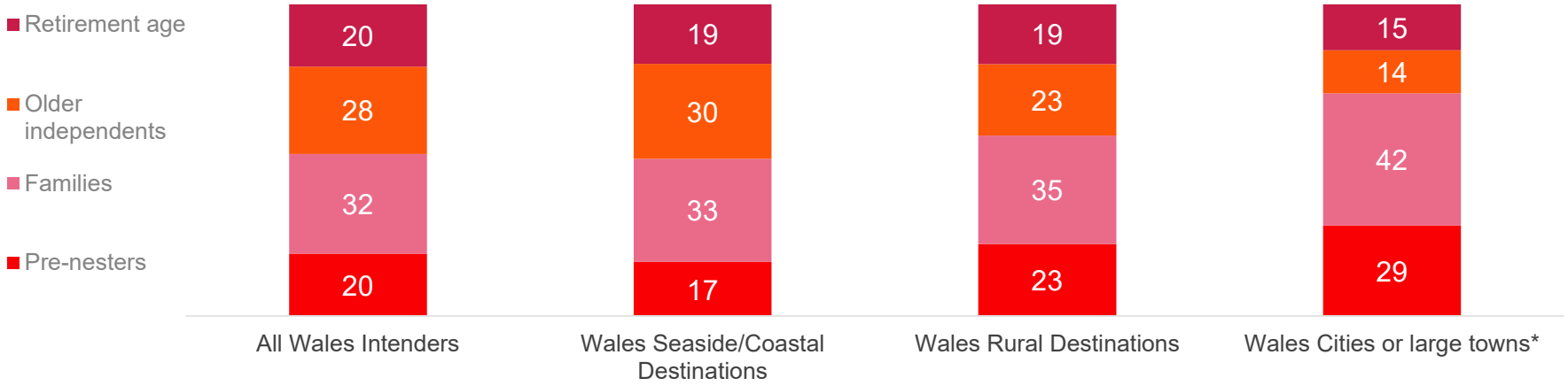


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83

Life stage breakdown of Wales intenders - *by destination type*

- The types of destination intended to visit in Wales varies by life stage.
- Older independents are most likely to intend to visit seaside/coastal destinations which, given, the higher incidence of this life stage amongst summer intenders will partly account for the increase in intended visits to traditional/coastal destinations this summer.
- The family life stage shows an interest in all types of destination, although it is important to note that not all will travel with their children. Only 16% of visitors to 'cities and towns', for example, are likely to visit with their children, although for seaside and rural destinations the proportions are consistent with life stage (see slide 41)
- Pre-nesters are more likely to be intending to visit Wales' cities or large towns'.

Figure 29. Life stage of Wales intenders by destination type, Percentage, Weeks 5 to 8, U.K.

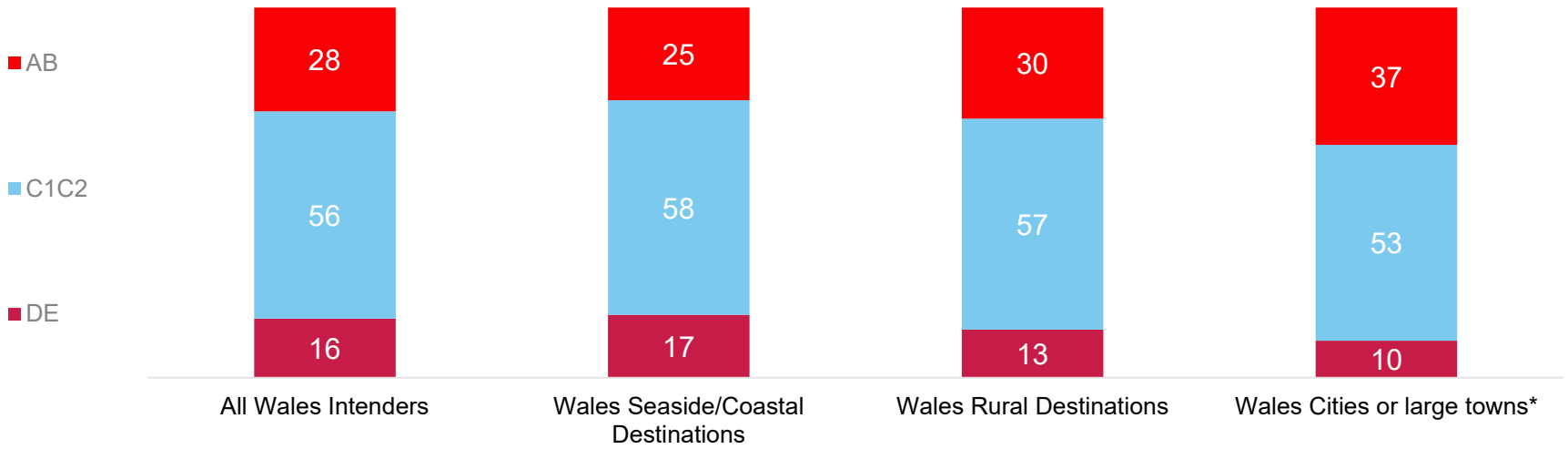


Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=176; Wales Rural Destinations (Countryside or village + mountains or hills) n=161; Wales Cities or large towns n=55

Social grade of Wales intenders - *by destination type*

- Consistent with weeks 1 to 4, C1C2s have the highest representation across all destination types, although ABs have the highest representation in Wales' cities and large towns.
- DE social grades make up a low proportion of intended visitors across all destination types.

Figure 30. Social grade of Wales intenders by destination type, Percentage Weeks 5 to 8, U.K.



Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=176; Wales Rural Destinations (Countryside or village + mountains or hills) n=161; Wales Cities or large towns n=55

Make-up of visitor party for next Wales holiday or short break

- Across both the summer and winter periods, visitor parties are most likely to travel to Wales with their partner, followed by child/grandchildren/young adults with parents, and friends. The incidence of children/grandchildren and young adults with parents is higher than in weeks 1 to 4. The high incidence of varying combinations of family visitors suggests multi-generational trips may be an option across both time periods.
- Nearly one in ten trip intenders are planning to travel with a pet.
- Travelling with friends make up a smaller proportion of visitors intending to visit Wales, whilst solo travellers are a small minority.

Figure 31. Visitor party make-up for Wales summer intenders, Percentage Weeks 5 to 8, U.K.

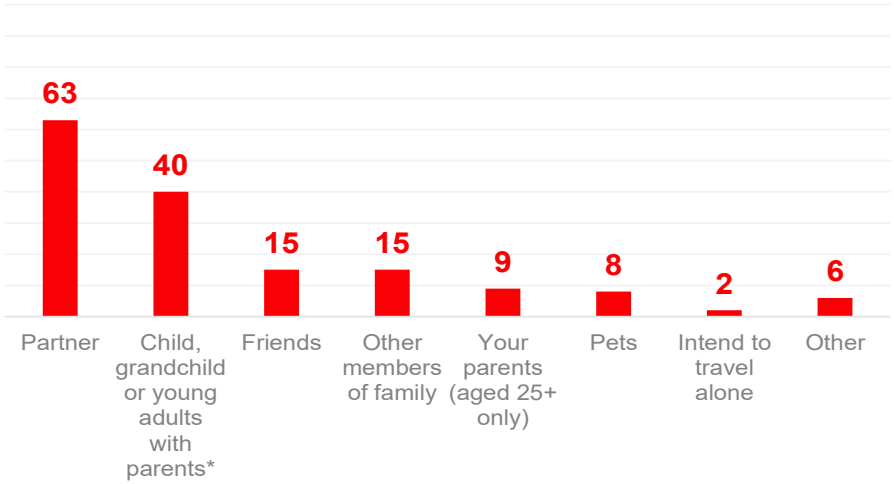
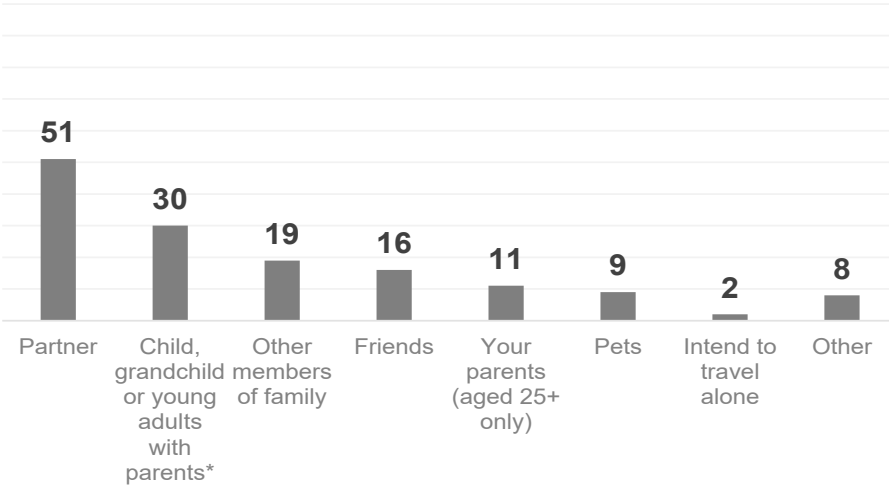


Figure 32. Visitor party make-up for Wales winter intenders, Percentage Weeks 5 to 8, U.K.



QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83 *Child or young adults includes respondents that states ‘children’, ‘grandchildren’ and 16-24 year olds stating they will travel with their parents

Visitor party breakdown of Wales intenders - *by destination type*

- Travelling to Wales with a partner has the highest representation across both seaside and rural destinations, followed by people travelling with children or young adults.
- Travelling with children or young adults have the highest representation in Wales Seaside/Coastal destinations, as do other family members, suggesting this type of destination offers potential for multi-generational trips.

Table 3. Visitor party by destination type for Wales intenders, Percentage, Weeks 5 to 8, U.K.

	All Wales Intenders	Wales Seaside/ Coastal Destinations	Wales Rural Destinations
Your partner	59%	58%	53%
Children or young adults (aged 16-24) with parents	36%	39%	34%
Friend/s	15%	15%	18%
With parents of older adults	10%	11%	11%
Other family member	17%	22%	11%
Pets	9%	4%	8%
Will travel alone	2%	1%	4%
Other	6%	6%	10%

QVB4d. With whom are you likely to be spending your holiday? QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning exclusively on taking a holiday or short break in Wales between July 2020 and March 2021.

Type of accommodation for next Wales short break or holiday

- There have been some movements in accommodation preference amongst summer intenders compared to weeks 1 to 4. Caravan/camping is now the number one accommodation type amongst summer intenders, chosen by 41% compared to 32% in weeks 1 to 4. 'Private home' is now the second preferred accommodation type.
- In the winter months, there is stronger demand for hotel accommodation, but a wide range of accommodation types are being considered, indicating that intenders are still keeping their options open

Figure 33. Accommodation planning on staying in on next U.K. overnight trip for Wales summer intenders, Net percentage Weeks 5 to 8, U.K.

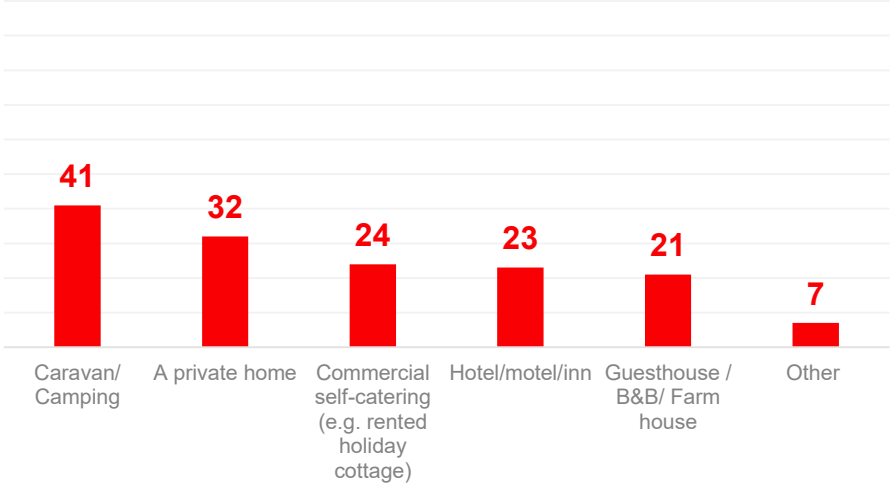
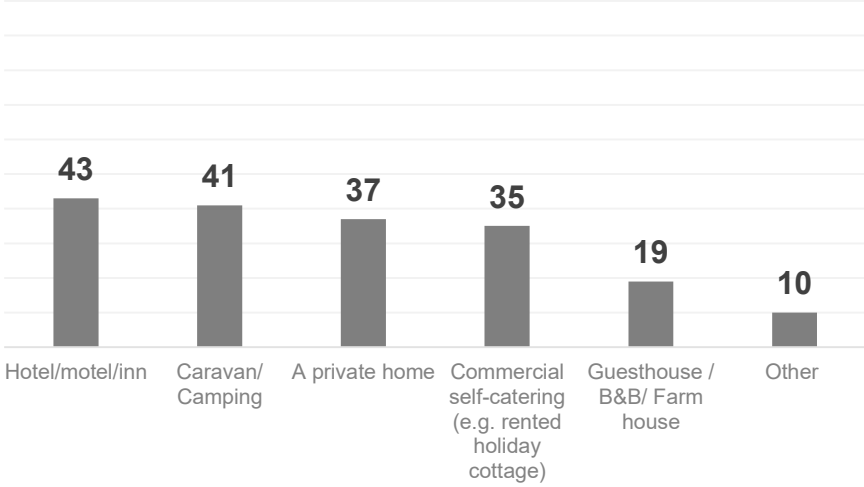


Figure 34. Accommodation planning on staying in on next U.K. overnight trip for Wales winter intenders, Net percentage Weeks 5 to 8, U.K.



QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. ?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83

Type of accommodation for next Wales short break or holiday

- The rise in ‘caravan/camping’ is driven predominantly by ‘static caravan’ stays, in particular those at caravan/campsites (i.e. not owned by the respondent).
- Of the private home accommodation options, there is a relatively even split between friends or relatives home and ‘someone else’s home on a commercial basis (e.g. Airbnb)’ in both the summer and winter.

Figure 35. Type of camping/caravanning accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 5 to 8, U.K.

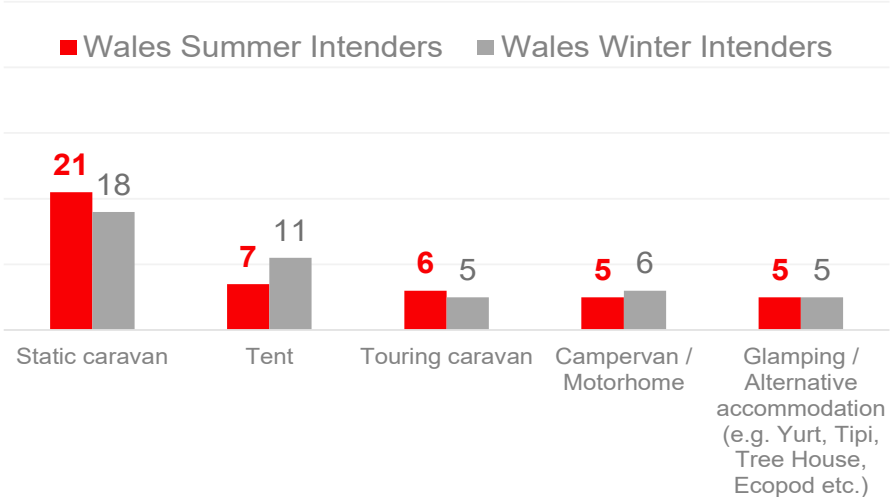
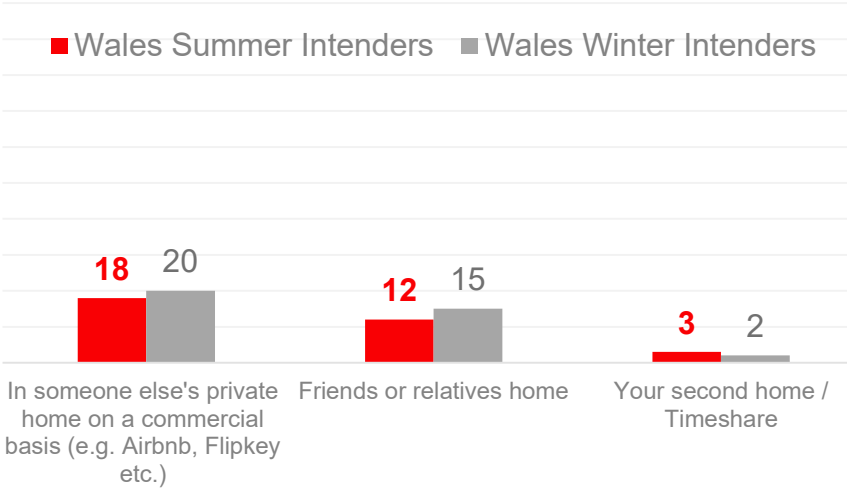


Figure 36. Type of private home accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 5 to 8, U.K.



QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83

Accommodation preference of Wales intenders – *by destination type*

- The rise in caravan/camping is in evidence in Wales' coastal and rural destinations. 'A private home' is more likely to be the preferred accommodation type in rural destinations.

Table 4. Accommodation type by destination type for Wales intenders, Percentage, Weeks 5 to 8, U.K.

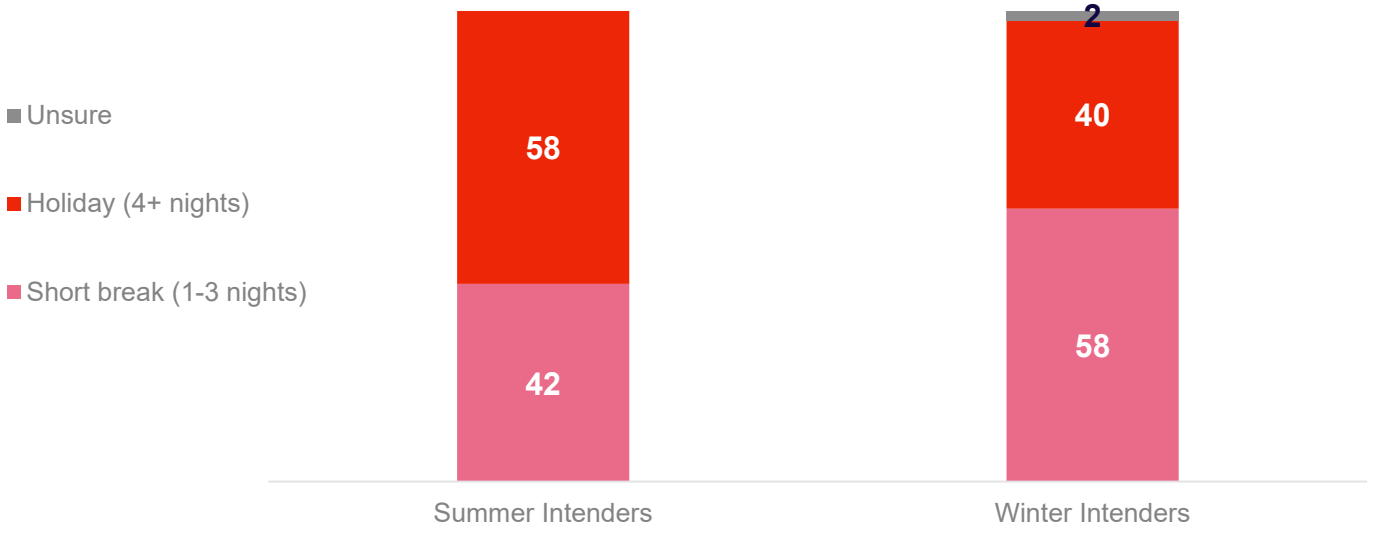
	All Wales Intenders	Wales Seaside/ Coastal Destinations	Wales Rural Destinations
Caravan/Camping	41%	41%	47%
A private home	34%	21%	42%
Hotel/ motel/ inn	30%	26%	24%
Commercial self-catering	28%	17%	32%
Guesthouse/ B&B / Farmhouse	20%	17%	19%
Other	8%	2%	9%

QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip ? And QVB5 Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=86; Wales Rural Destinations (Countryside or village + mountains or hills) n=62;

Anticipated length of Wales holidays by time period

- As in weeks 1 to 4, trips to Wales in the summer months are more likely than winter trips to be holidays of 4+ nights (58% compared to 40%).
- Wales is set to generate more trips of 4+ nights than any other U.K. government region
- The winter period has stronger demand for short beaks in Wales.

Figure 37. Length of next holiday or short break in Wales by time period, Percentage Weeks 5 to 8, U.K.



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83

Breakdown of trip length - *by life stage and social grade*

- Those intending to take longer trips to Wales are comprised of a higher proportion of retirees and DE social grades (two groups that overlap)
- Families and Older Independents are intending to take a mix of shorter and longer trips to Wales
- Pre-nesters are more likely to be intending to take short breaks in the summer in Wales, which in part reflects their higher tendency to choose city breaks.

Figure 38. Life stage breakdown of Wales summer intenders by trip length, Percentage Weeks 5 to 8, U.K.

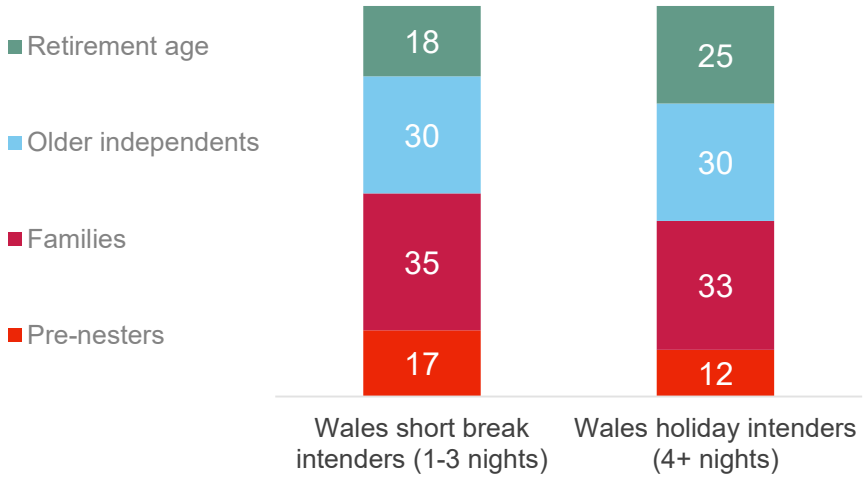
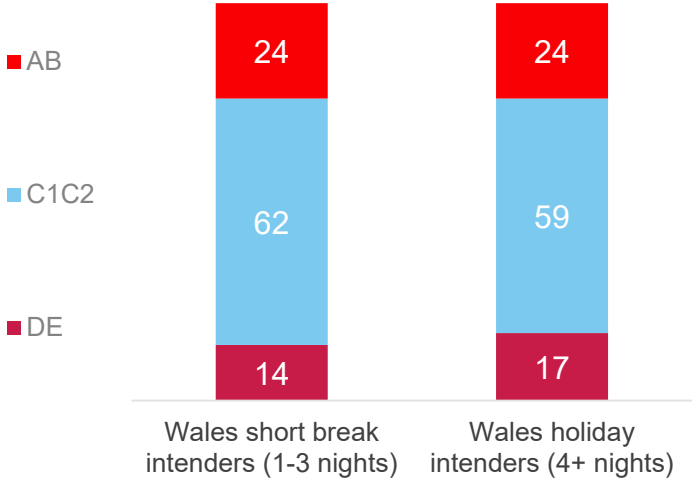


Figure 39. Social grade breakdown of Wales summer intenders by trip length, Percentage, Weeks 5 to 8, U.K.

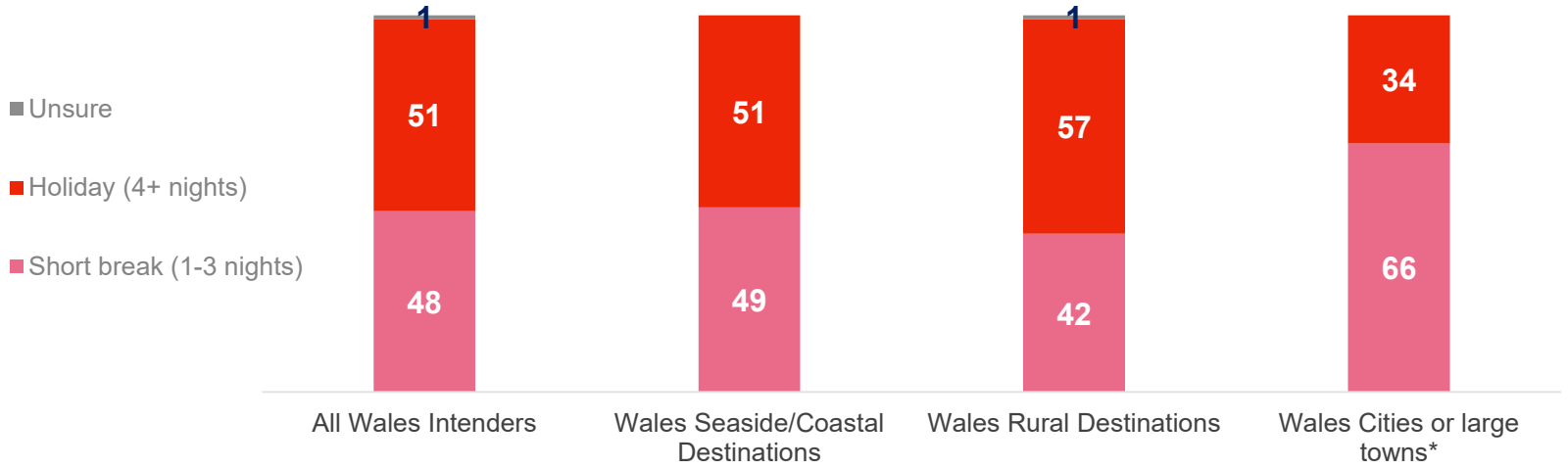


Demographic questions and QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents planning on taking a holiday or short break in Wales this summer. Short breaks n=91; Holidays n=87

Trip length of intenders – *by destination type*

- Across the whole year, trips to Wales' coastal and rural destinations are marginally more likely to be holidays of 4+ nights. Trips being planned to cities or large towns in Wales are much more likely to be short breaks.

Figure 40. Length of next Wales holiday or short break by destination type, Percentage Week 1-4, U.K.



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? And QVB5 Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between July 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=86; Wales Rural Destinations (Countryside or village + mountains or hills) n=62; Wales Cities or large towns n=22

Anticipated spend on next U.K. and Wales holiday or short break

- Wales summer intenders expect to spend £670 on their holiday or short break, higher than the spend stated in weeks 1 to 4, and only marginally below the U.K. average (£676). Given the longer trips of Wales visitors compared to the wider U.K., 'spend per night' is likely to be significantly lower in Wales compared to the wider U.K.
- Anticipated spend on Wales holidays and short breaks is higher in the summer than in the winter months, perhaps reflecting fewer longer holidays in the winter and the high proportion of winter intenders reporting reduced income as a result of COVID-19.

Figure 41. Anticipated spend for Wales intenders , Percentage Weeks 5 to 8, U.K.

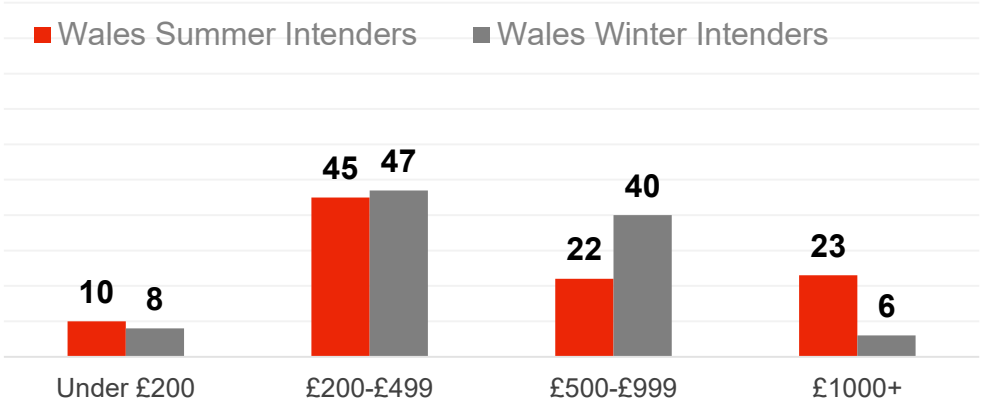
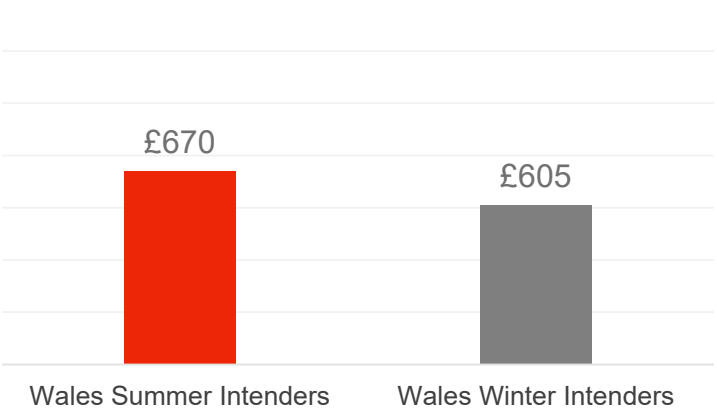


Figure 42. Anticipated average spend for Wales intenders, Average, Weeks 5 to 8, U.K.

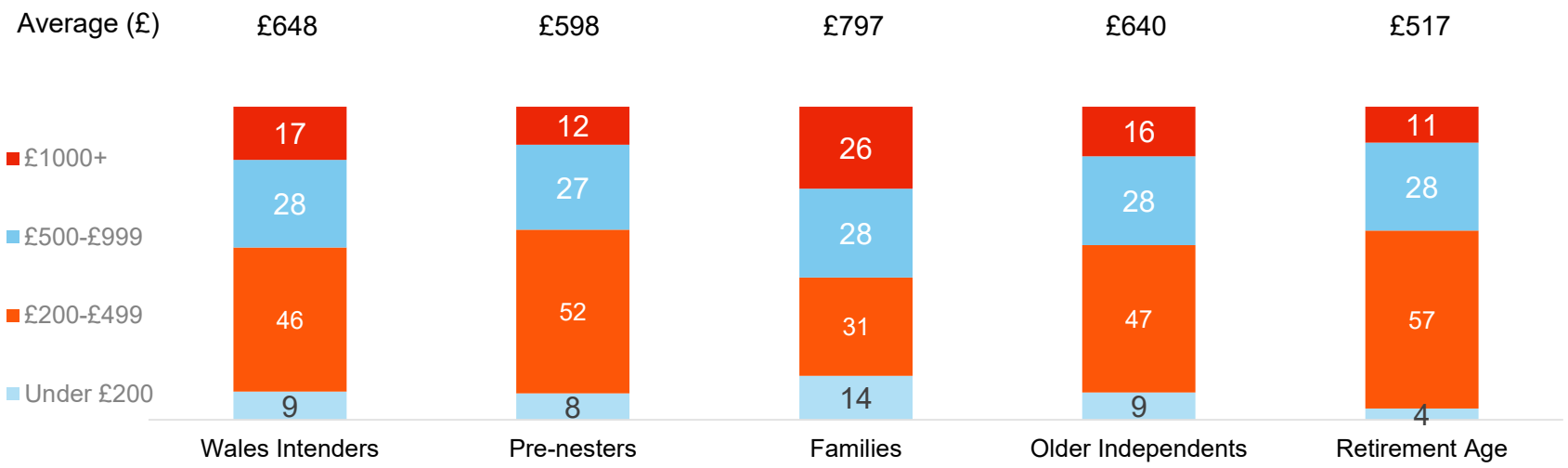


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break in the U.K. and Wales from July 2020 to March 2021 All Wales Exclusive Summer Intenders n=127, All Wales Exclusive Winter Intenders n=83

Anticipated spend for Wales intenders *by life stage**

- Families are likely to generate the highest spend on their trip to Wales, followed by Older Independents. With their higher incidence amongst summer intenders compared to weeks 1 to 4, 'older independents' are driving increased average spend.

Figure 43. Anticipated trip spend for Wales intenders by life stage, Average, Percentage Weeks 5 to 8, U.K.

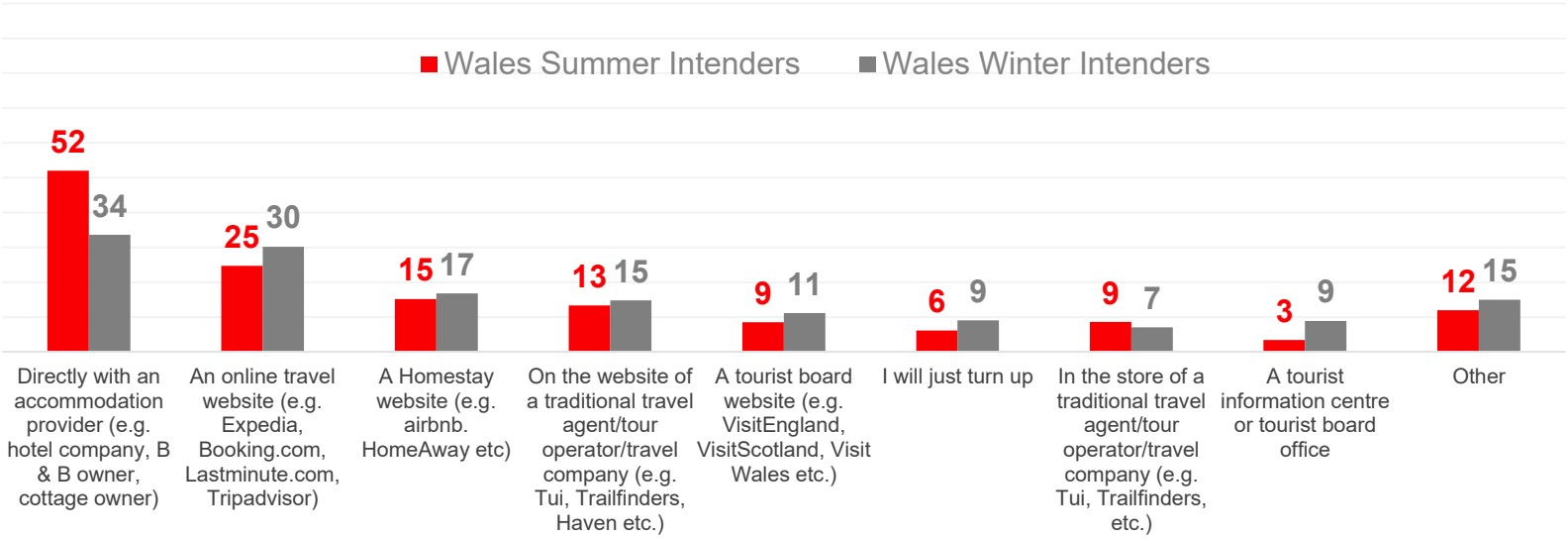


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break in Wales between July and March. Winter Intenders n=79; Pre-nesters n=46*, Families n=61*; Older independents n=59*, Retirement Age n=27* *Note very small base sizes, please treat indicatively

Preferred booking channel for next Wales short break or holiday

- Winter and summer intenders to Wales are most likely to book directly with the accommodation provider, followed by an online travel agent (OTA) and 'a home stay website'.
- Direct booking is significantly more likely amongst summer intenders and than in the previous survey wave, and is higher for people intending to visit Wales in the summer than in the winter, which may reflect the need for checking details directly with the owner and greater use of caravan and self catering accommodation during this period.

Figure 44. Accommodation booking channel for Wales summer intenders, Net percentage Weeks 5 to 8, U.K.

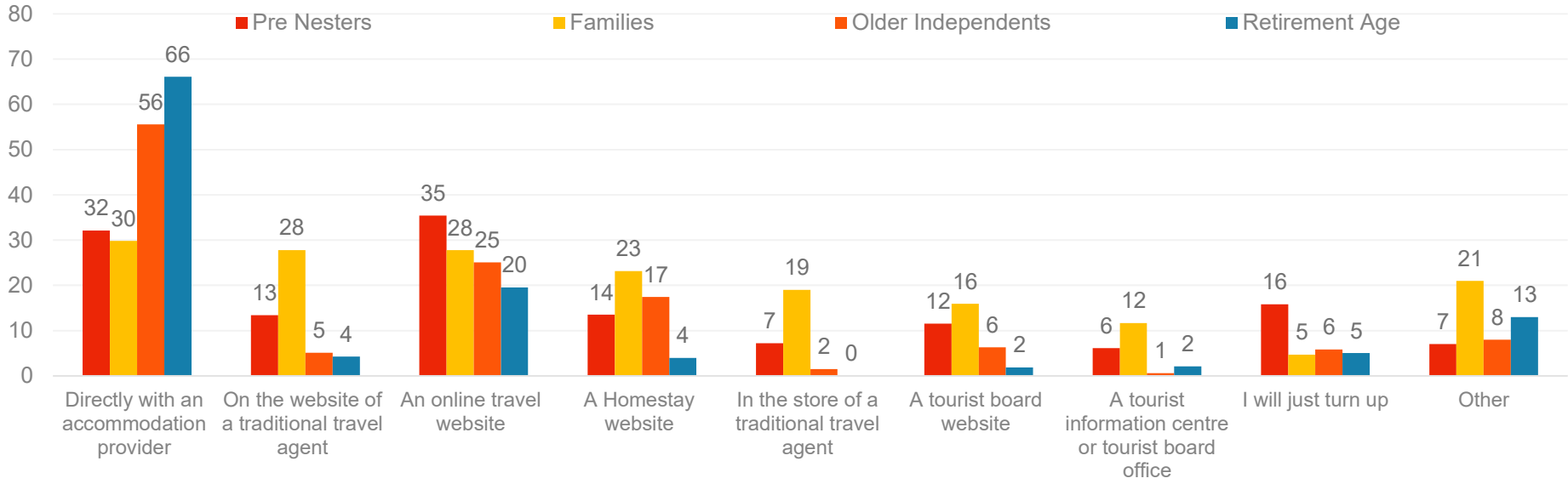


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All respondents planning on taking a holiday or short break in Wales. Wales Inclusive summer intenders n=184; Wales Inclusive winter intenders n=133

Breakdown of booking channel for trip to Wales by life stage

- Booking channels have varying representation amongst life stages – those of retirement age are the most likely to book directly with the accommodation. Older independents are also more likely to book directly, but reflecting the range of ages within this life stage also book across other channels.
- Pre-nesters index highest via Online Travel Websites or homestay websites; families are more likely to book direct and amongst traditional travel agent websites.

Figure 45. Life stage breakdown of intenders booking channel, Percentage Weeks 5 to 8, U.K.



Demographic questions and VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip Base: All respondents planning on taking a holiday or short break in Wales Pre-nesters n=72; Families n=113; Older Independents n=87; Retirees n=45

Main mode of transport for next Wales short break or holiday

- Across both time periods, 'own car' is by far the leading mode of transport intended to be used on trips to Wales , followed by train.
- The train is more likely to be used on trips intended to be taken in Wales during the winter, perhaps reflecting the higher proportion of planned trips to cities and large towns.

Figure 46. Top 5 main modes of travel to destination for trip in July to September, Percentage Weeks 5 to 8, U.K.

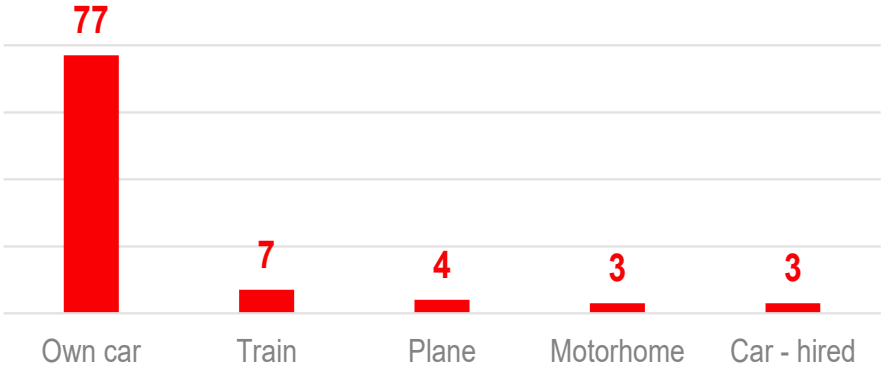
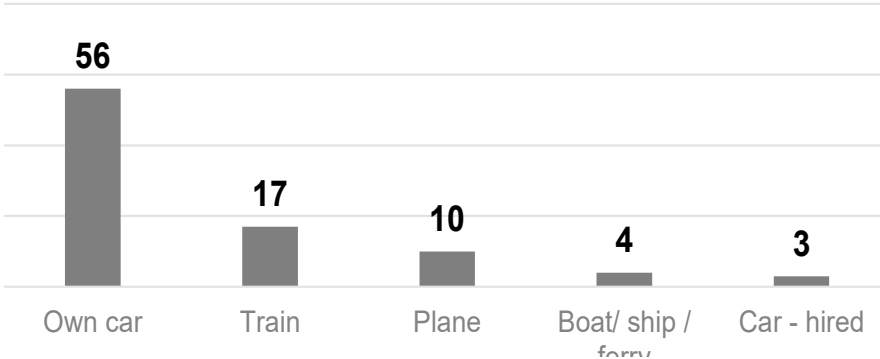


Figure 47. Top 5 main modes of travel to destination for trip from October to March, Percentage Weeks 5 to 8, U.K.



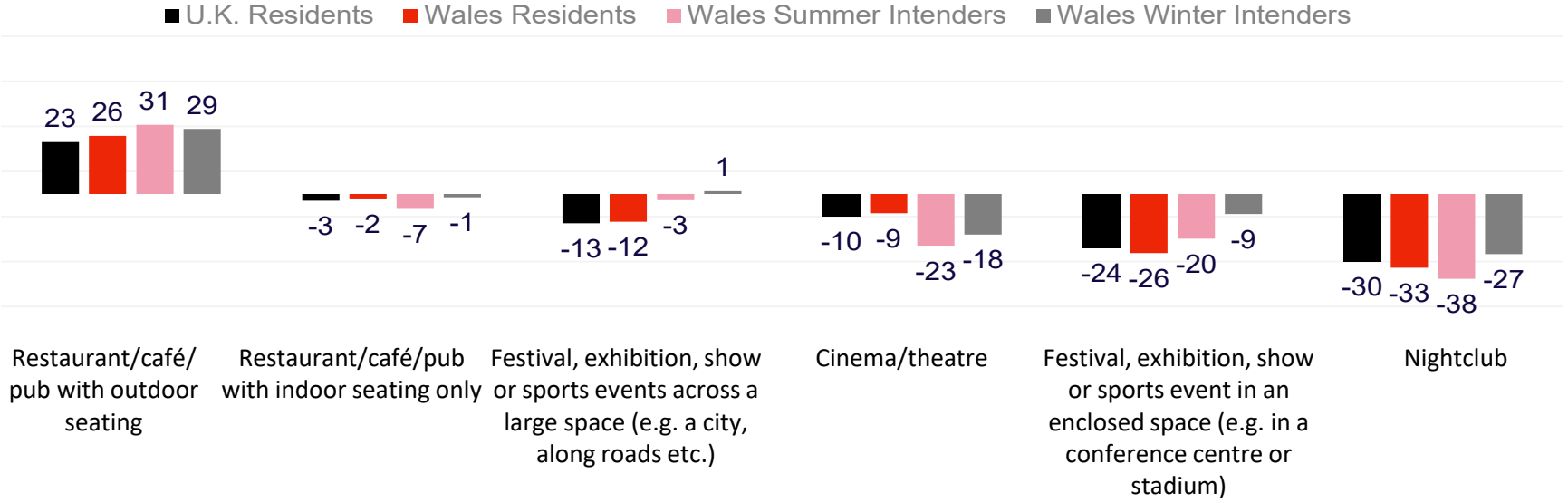
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=127; Wales Exclusive winter intenders n=83

Activity engagement post lockdown

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (visitors and residents) anticipate engaging in more visits to restaurants/cafes or pubs with outside seating as lockdown restrictions are lifted
- All audiences anticipate fewer visits to indoor restaurants/cafes/pubs, the cinema/theatre, festivals and nightclubs.

Figure 48. Entertainment and events venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 5-8, U.K. and Wales

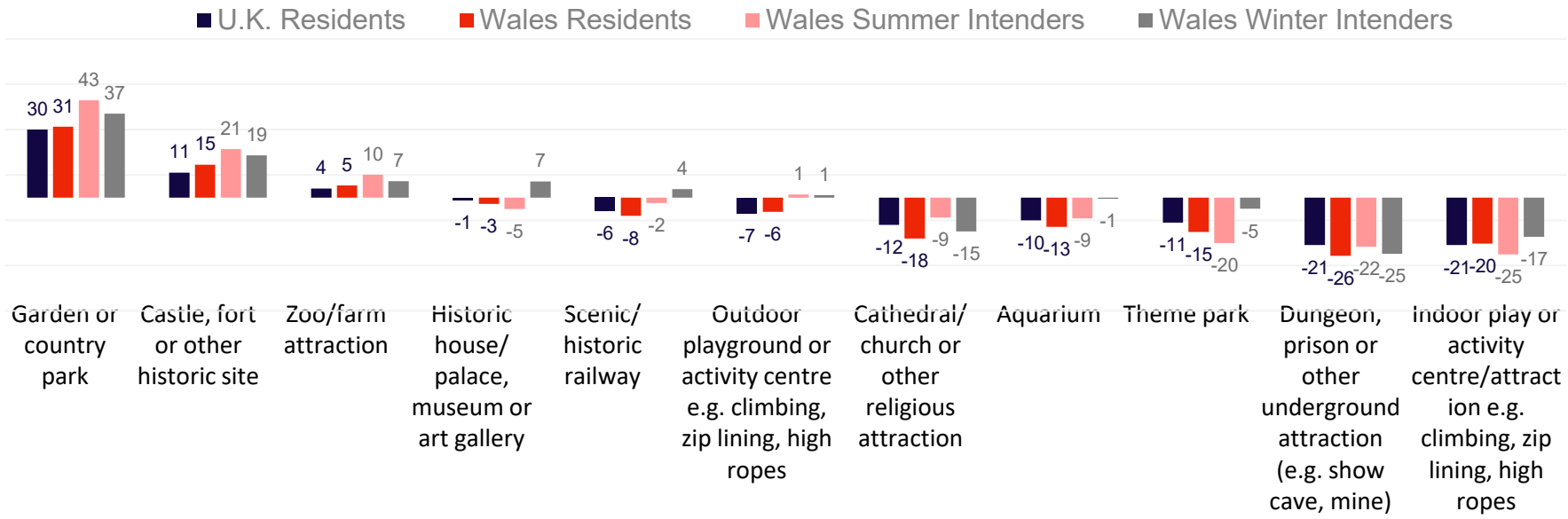


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders n=184; Wales winter intenders n=133

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (visitors and residents) anticipate more visits to outdoor attractions as lockdown is lifted, in particular gardens and castles and historic sites. There is a general expectation of conducting fewer visits to indoor attractions, particularly those in small spaces (e.g. dungeons) or with a hands-on element at their core (e.g. theme parks or indoor play or activity centres)

Figure 49. Visitor attractions more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 5-8, U.K. and Wales

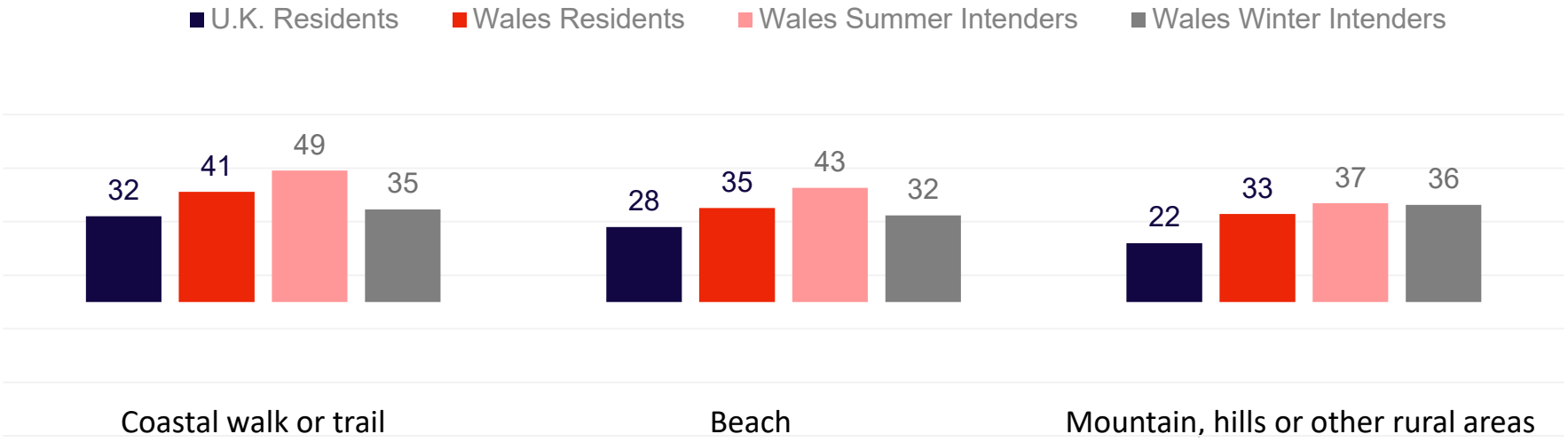


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders n=184; Wales winter intenders n=133

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (visitors and residents) are more likely to visit outdoor areas such as beaches, mountains or hills/rural areas, and coastal walks/trails.
- People intending to visit Wales during the summer are more likely to be planning to visit these types of outdoor location.

Figure 50. Outdoor areas more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 5-8, U.K. and Wales

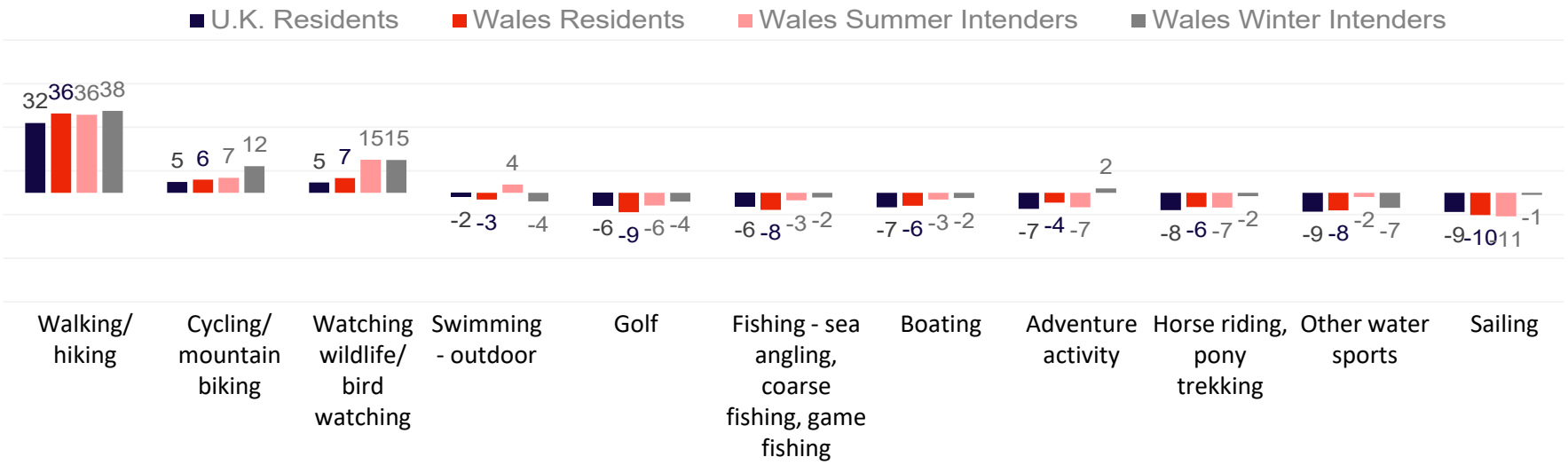


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders n=184; Wales winter intenders n=133

General leisure activity intentions as lockdown restrictions are lifted

- All audiences anticipate a large net increase in likelihood to go walking/hiking after lockdown restrictions are lifted
- There is also an anticipated increase in likelihood of watching wildlife and cycling/ mountain biking, with higher expectations to do these amongst those intending to visit Wales. There is likely to be a small net decrease in anticipation to undertake most other outdoor activities, although Wales summer intenders are marginally more likely to go swimming outdoors

Figure 51. Outdoor activities more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 5-8, U.K. and Wales

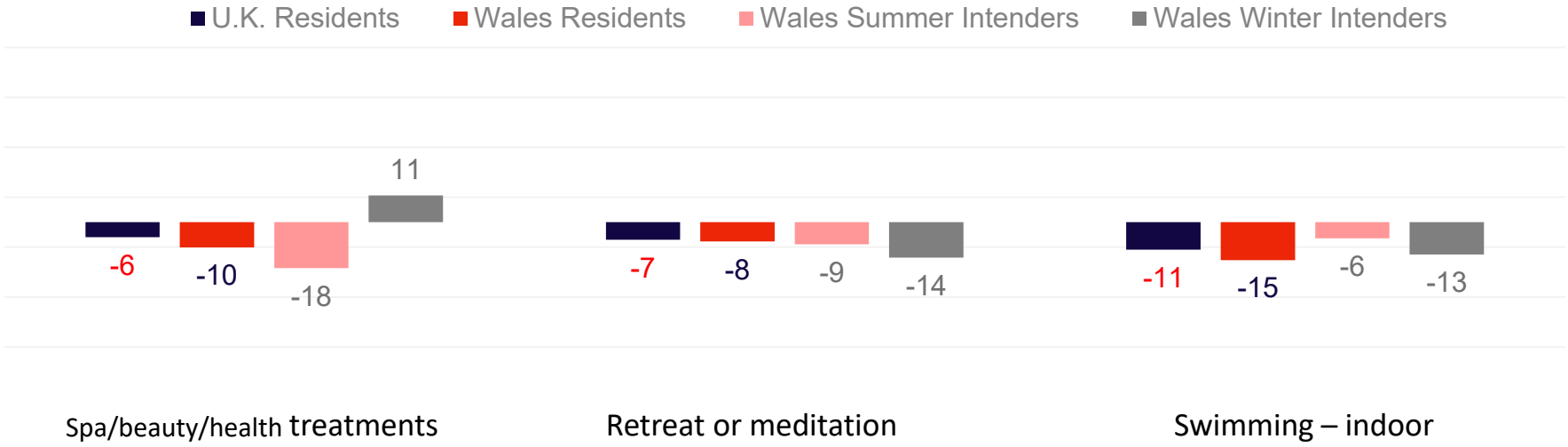


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders n=184; Wales winter intenders n=133

General leisure activity intentions as lockdown restrictions are lifted

- In general, both summer visitors and residents currently indicate lower than normal expectation to undertake indoor swimming or health and beauty treatments as restrictions are lifted, reflecting current nervousness with close personal contact
- Winter intenders indicate a net higher intention to undertake 'spa/beauty/health treatments'

Figure 52. Indoor health and wellness more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 5-8, U.K. and Wales



QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=6993; Wales population n=818; Wales summer intenders n=184; Wales winter intenders n=133

Methodology

Methodology

The findings in this report are based on a weekly online survey conducted amongst a nationally representative sample of the U.K. population.
The sample is representative of U.K. adults aged 16+ by gender, age, government region and social grade.
In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Scotland and Wales to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
This report aggregates the results taken from Weeks 5-8 of the COVID-19 consumer weekly tracker.