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COVID-19 UK Tourism Consumer Tracker Survey: Wales profile report 2020 (Weeks 1 – 4)

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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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 UK 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 UK 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 UK 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 on the week commencing 18th May

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

- **18-22 May; 25-29 May; 1-5 June; 8-12 June**

Definitions used within this report (1)

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

- **Summer Intenders:** Members of the public who state their next UK holiday or short break will be between June and September this year (21% of UK population)
- **Winter Intenders:** Members of the public who state their next UK holiday or short break will be from October 2020 to March 2021 (19% of the UK population)

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

Key findings



Key findings (1)

General sentiment in the UK short break and holiday market

1. At the time of the survey between Mid May to Mid June, there is notable caution around conducting leisure activity amongst UK 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'.
2. Caution is also reflected in holiday booking behaviour. Only a minority feel confident they would be able to go on a UK holiday or short break in July or August this year, and whilst confidence rises for trips in September, the proportion confident remains below half. Restrictions on travel from government, fewer opportunities to eat/drink out, concerns about catching COVID-19 and fewer things to do, are the leading reasons for lack of confidence in ability to take a trip in the summer months.
3. Lack of confidence is reflected in anticipated UK trips this year, which are set to decline compared to normal.
4. Wales residents are significantly less confident and more cautious than UK residents, and are more likely to cite government restrictions as the main reason for this.
5. 21% of UK residents are likely to go on a summer UK break this year, compared to 17% of Wales residents. Of these, around half are set to take multiple trips this year. However, the majority are yet to plan or book their trip suggesting there is still an opportunity for destinations to secure their interest.
6. Holiday intentions have only increased slightly since the survey period and the pattern of demand remains similar to reported here.

Key findings (2)

Wales Visitor and trip profiles

1. Amongst UK residents planning a domestic holiday this summer (between June and September), Wales is the number three destination, behind Scotland and South West of England. Amongst Wales residents planning on a trip this summer, Wales is the number one destination followed by the South West of England.
2. Residents of Wales, West Midlands and North West of England are most likely to visit Wales this summer. There is also interest from around 1 in 10 of the highly populated South East and London regions. It's worth noting that Wales indexes slightly lower than some other parts of the UK for attracting visitors from their 'home region'.
3. Wales is set to attract a range of visitor types this year. Families make up a higher proportion of intended visitors to Wales over the summer period. Whilst older retired age groups are less likely to be taking trips across the UK, there are above average levels looking to visit Wales in the summer. Older Independents and Pre-nesters make up a higher proportion of people intending to visit Wales in the winter.
4. Destination choice is dictated largely by proximity to place of residence with prospective visitors opting for destinations that are close by. North Wales remains popular for Wales summer and winter visitors living over the border in England, whilst West Wales is favoured by visitors living in Wales.
5. Wales intenders are planning to come to Wales for a range of holiday types, but 'countryside or village', 'traditional coastal/seaside town' and 'rural coastline' are the top three in the summer. 'Mountains or hills' are fourth but are significantly higher than summer trips to the UK on the whole.
6. Around 1 in 4 visitors to Wales in both summer and winter 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. Visitors with children and other family members are most likely to take trips to Wales coastal/seaside destinations.

Key findings (3)

Accommodation and Booking

1. Commercial self-catering, caravan/camping and private home are three preferred accommodation categories for Wales trips this summer, followed by hotels and guesthouses/B&Bs. Of the camping options, static caravans, tents and touring caravans are the top three.
2. Visitors to Wales in both the summer and winter are most likely to book their accommodation directly with a provider, followed by an Online Travel Agent, homestay website and website of a traditional travel agent. However, this varies considerably by life stage, highlighting the need for accommodation providers to offer a range of booking options.
3. Half 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. In the winter months, the majority of trips are expected to be short breaks.

Visitor Spending

1. The anticipated spend for Wales trips (summer and winter combined) is £512 per party, significantly lower than the UK average on the whole (£621), despite slightly longer trips being planned.
2. The lower spend 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. Wales summer intenders are significantly more likely to state that they have not been affected financially or that they are better off than before. However, people who state they need to be careful with their finances make up a substantial proportion of visitors intending to visit Wales and affordable holidays may be a particular priority for these travellers.
4. Trip spend is estimated to be higher in Wales in the winter period, perhaps reflecting the higher proportion of social grade ABs and older independents intending to visit in the winter months.

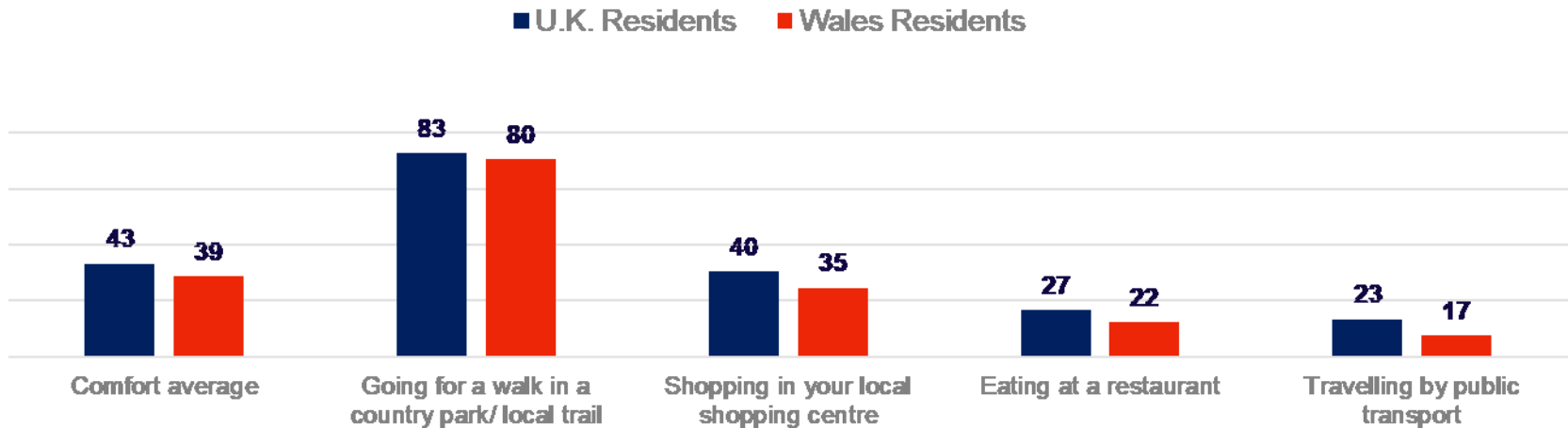
Profiling the short break and holiday market



Level of comfort undertaking activities with a ‘comfort average’

- UK residents and Wales residents show similar comfort patterns with undertaking everyday activities – both most comfortable with ‘going for a walk in a country park/local trail’, followed by ‘shopping in your local shopping centre’, ‘eating at a restaurant’ and ‘travelling by local transport’. However, residents from Wales are less comfortable doing all activities than UK residents.

Figure 1. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Weeks 1 to 4, UK and Wales

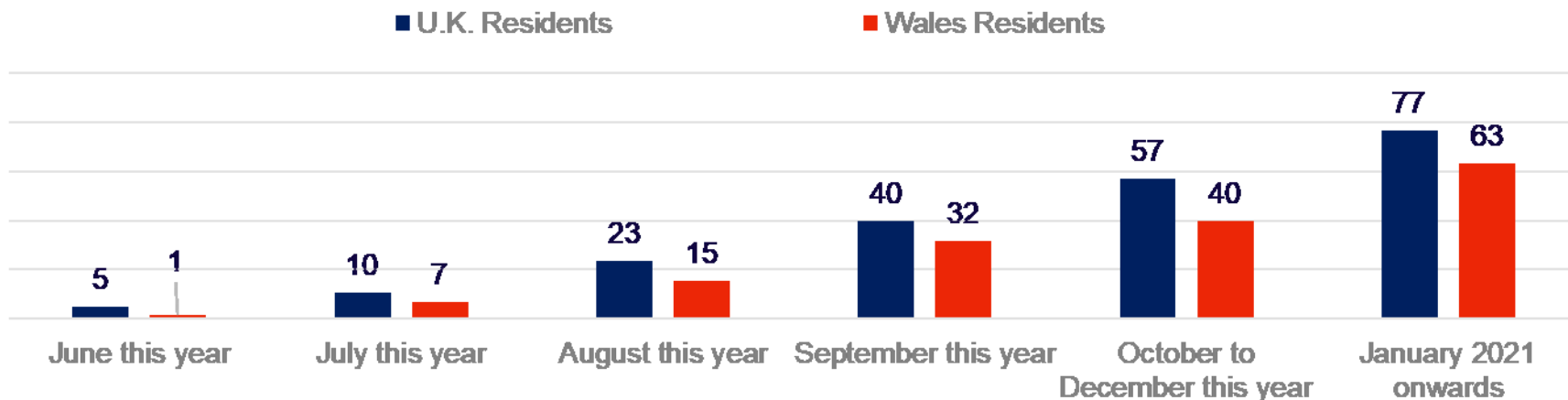


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All UK residents n=7,008; All Wales residents n=766

Confidence in the ability to take a UK short break or holiday

- Only a minority of UK residents and Wales residents are confident that they'd be able to go on a UK short break in June, July or August this year. Confidence rises quite steeply from September towards the end of the year and into 2021.
- However, confidence amongst Wales residents is significantly lower than confidence amongst UK residents, and the gap widens from October onwards.

Figure 2. Confidence in taking a UK short break or holiday across a range of different months, Net percentage very and fairly confident, Weeks 1 to 4, UK and Wales

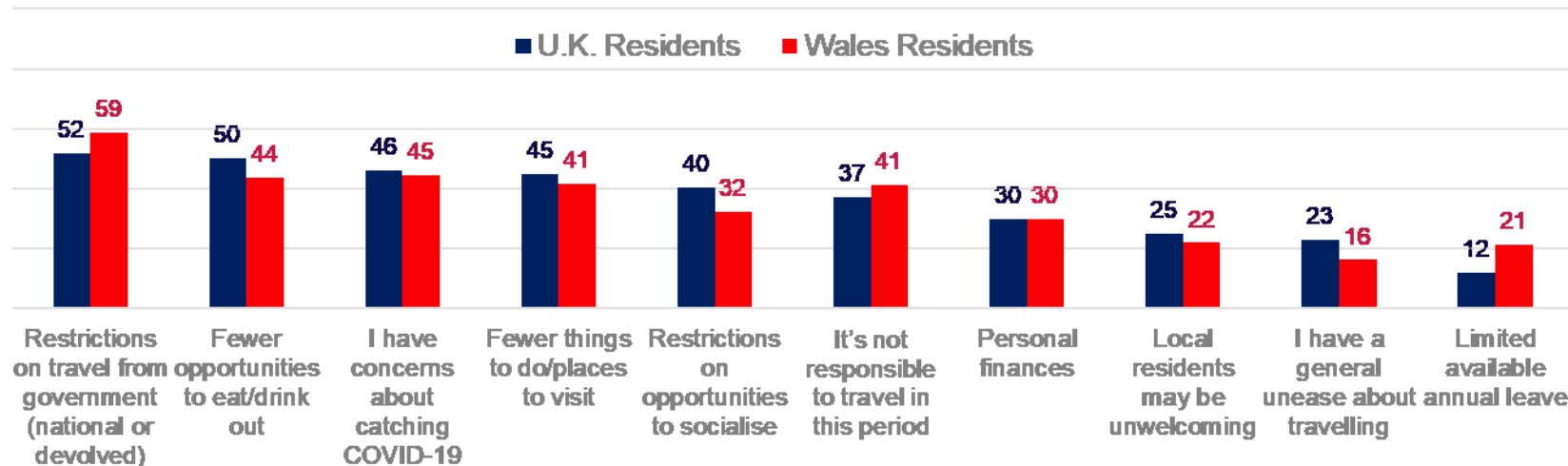


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All UK residents n=7,008; All Wales residents n=766

Reasons for not feeling confident taking summer trips in the UK

- 'Restrictions on travel from government' is the leading reason for lack of confidence about taking a trip between June and September amongst both UK residents and Wales residents, but significantly more so amongst Wales residents. Wales residents also index higher for stating 'it's not responsible to travel in this period'.
- Fewer opportunities to eat/drink out, catching COVID-19 and fewer things to do/places to visit are further concerns for UK and Welsh residents.

Figure 3. Reasons for not being confident about travelling between June to September, Percentage, Weeks 1 to 4, UK and Wales

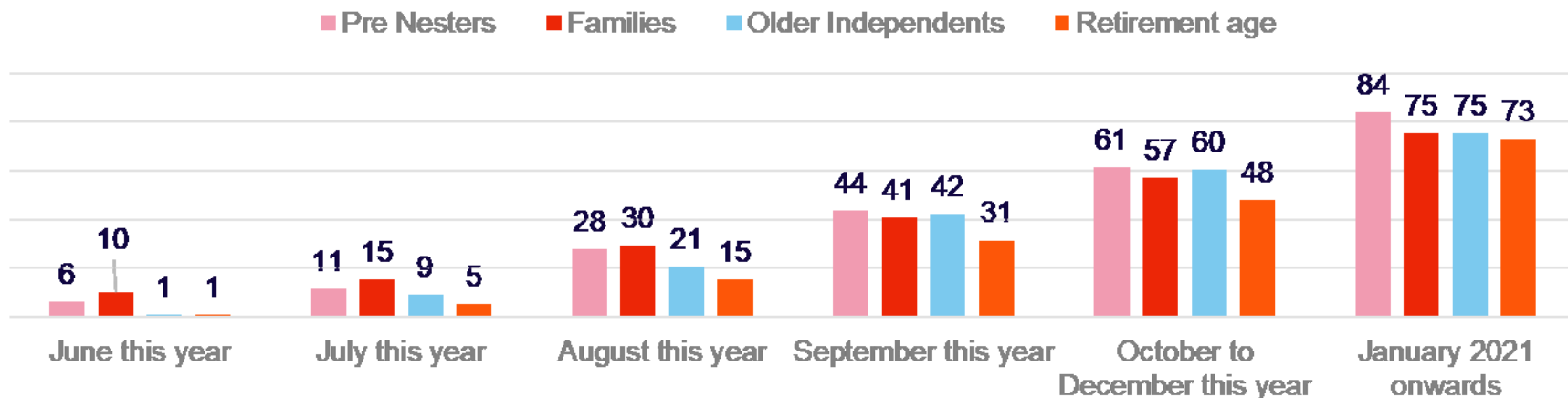


QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a UK short break or holiday between June and September? Base: Multiple trip-takers n=165; summer intenders n=293; winter intenders n=310; Persuadables n=209; Non-planners n=168

Confidence to take UK short break or holiday – by life stage

- The pattern of increasing confidence to take trips later in the year is relatively consistent across life stages.
- Pre-Nesters and families have higher confidence to take a trip in the summer.
- Older Independents confidence increases for taking a trip later this year.
- Retirement ages show lower confidence to take a trip across all periods this year, significantly so from September to December

Figure 2b. Confidence in taking a UK short break or holiday across a range of different months by life stage. Net percentage very and fairly confident, Weeks 1 to 4, UK



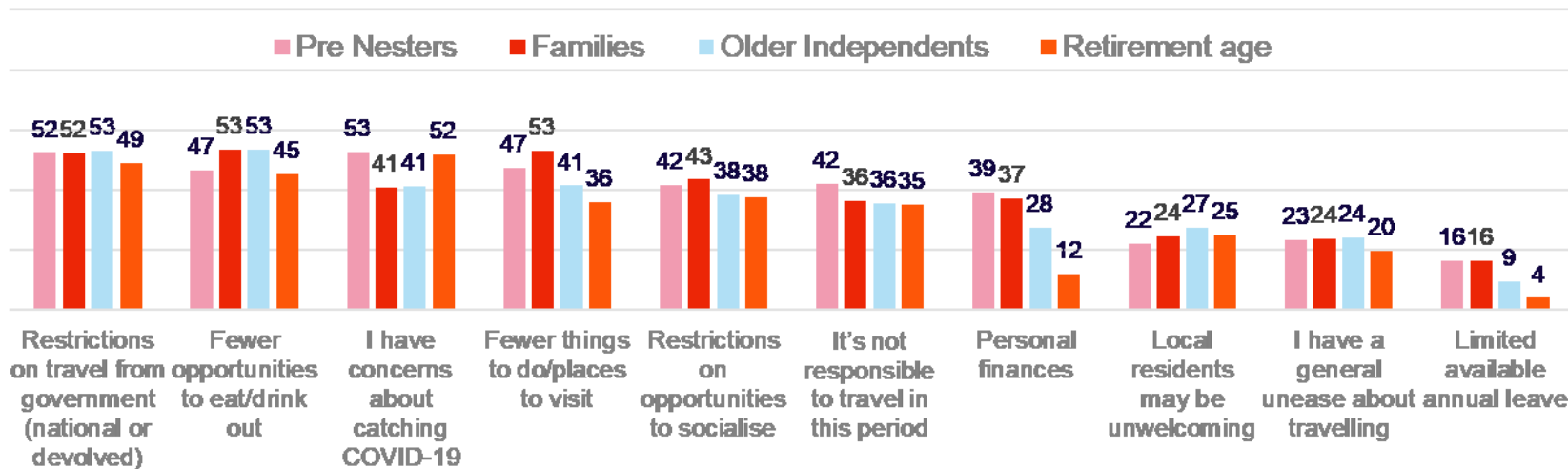
QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?

Base: Pre-nesters n=377, Families n=358, Older Independents n=377, Empty Nesters n=214

Reasons for not feeling confident about taking trips in the UK between June and September – by life stage

- There are varying reasons different life stages would not be confident about taking a UK trip between June and September. Families index higher on 'fewer things to do/places to visit' and 'fewer opportunities to eat/drink out'. For people of retirement age, 'I have concerns about catching COVID-19' is the most cited reason, and they are the least likely to state 'personal finances'.
- Pre-nesters are most likely to state 'it's not responsible to travel in this period' and to indicate 'personal finances' as a barrier

Figure 3b. Reasons for not being confident about travelling between June to September by life stage, Percentage, Weeks 1 to 4, UK



QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a UK short break or holiday?

Base: Pre-nesters n=327, Families n=309, Older Independents n=356, Empty Nesters n=214

Anticipated number of UK trips this year compared to normal

- Both UK and Wales residents anticipate a 'net decrease' in UK short breaks and holidays this year
- However, Wales residents are significantly more likely than UK residents to state 'don't know' when asked to state their domestic short break or holiday intentions (26% compared to 20% for short breaks; 27% compared to 22% for holidays of 4+ nights)

Figure 4. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 1-4 , UK and Wales

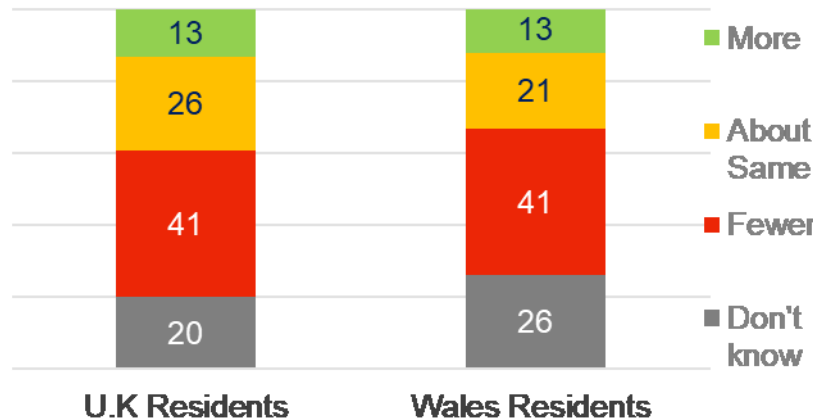
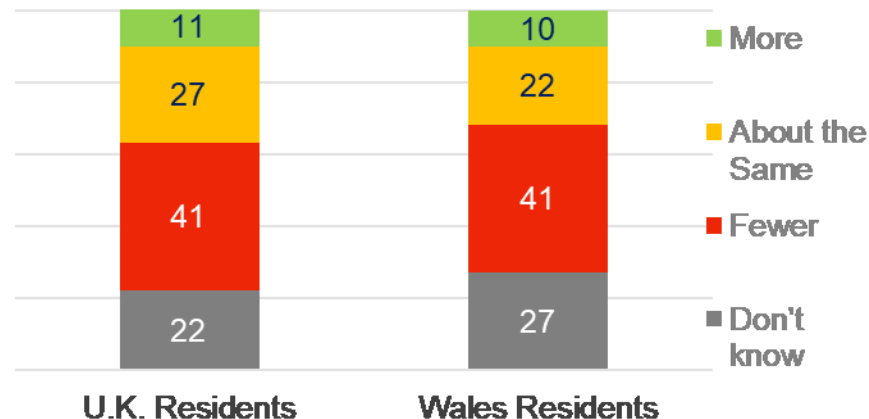


Figure 5. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Week 5, UK and Wales



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of the

Base: All UK residents n=7,008; All Wales residents n=766

Anticipated number of Overseas trips this year compared to normal

- UK 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 UK trips.
- As with UK trips, Wales residents are significantly more likely to state they 'don't know' when asked about overseas trip intention

Figure 6. Number of OVERSEAS short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 1-4, UK and Wales

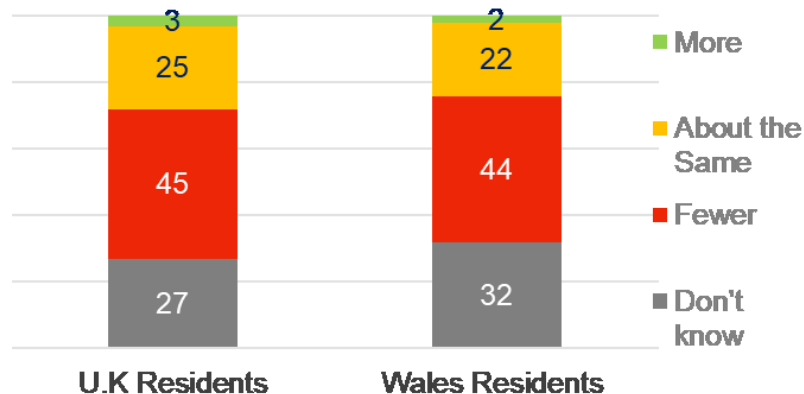


Figure 7. Number of OVERSEAS holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 1-4, UK and Wales



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of the

Base: All UK residents n=7,008; All Wales residents n=766

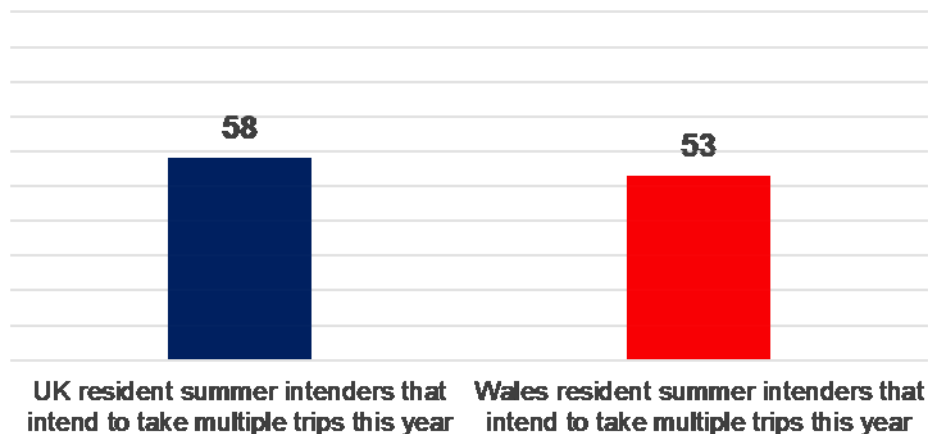
When anticipating going on next UK short break or holiday

- 17% of Wales residents anticipate going on a UK short break or holiday this summer (between July and September), significantly lower than the proportion of UK residents planning on doing so.
- 19% of Wales residents intend to take their next UK holiday or short break this winter (between October 2020 and March 2021), identical to the proportion of UK residents intending to do so
- Wales residents are significantly more likely than UK residents to anticipate going on their next trip in Spring/summer 2021, or to want to take a trip but not know when they will go

Figure 8. When anticipate GOING on next UK trip, Percentage Weeks 1-4, UK and Wales



Figure 9. Proportion of summer intenders intending to take more than one trip this year, Percentage, Weeks 1-4, UK



Whether planned or booked UK holiday or short break*

- Wales Intenders are significantly less likely than UK Intenders to have already planned or already booked their next UK short break or holiday, both in the summer and the winter months.

Figure 10. Proportion of Intenders that have already planned their trip , Percentage Weeks 1-4, UK and Wales

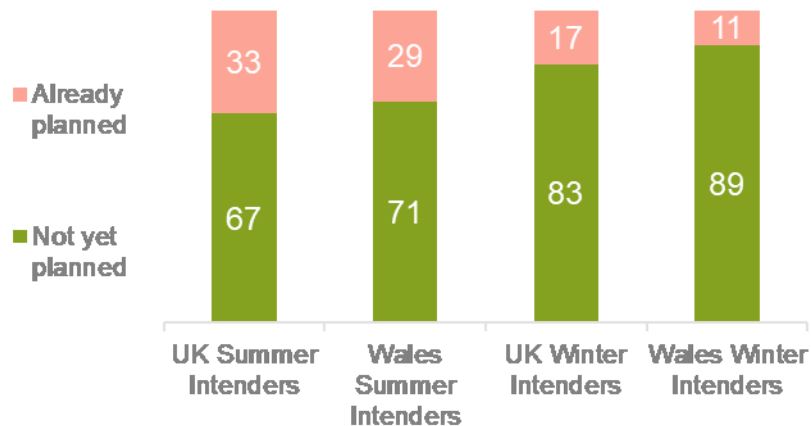
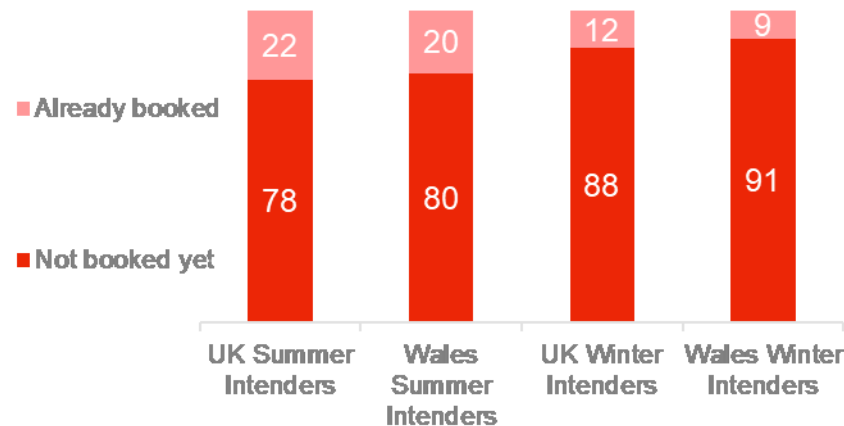


Figure 11. Proportion of Intenders that have already booked their trip , Percentage Weeks 1-4, UK and Wales

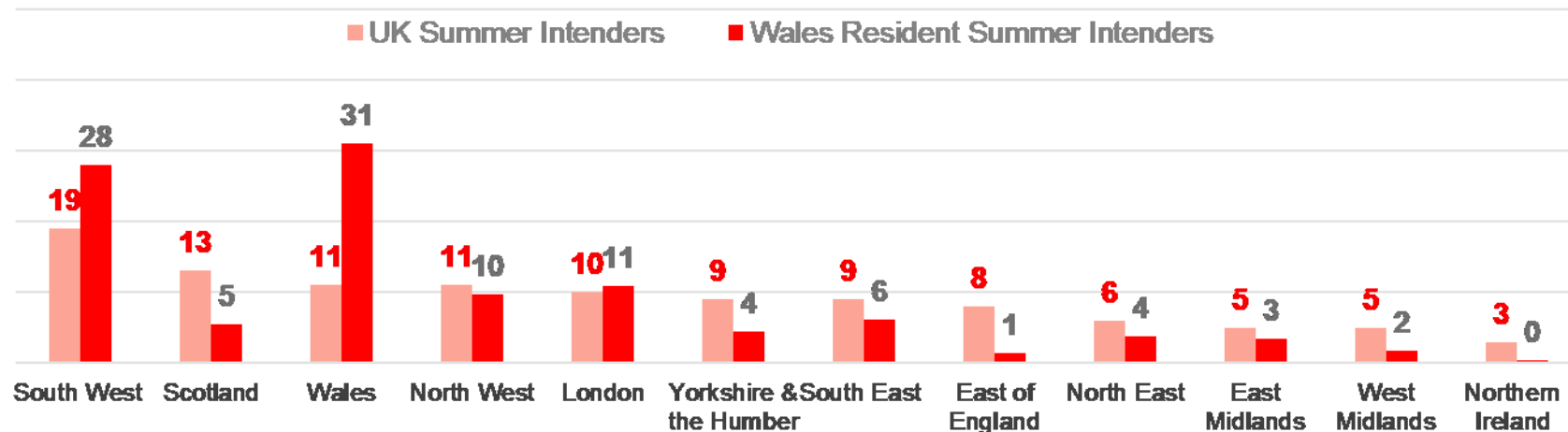


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Weeks 1-4 UK summer intenders n=1,453 ;Wales Inclusive summer intenders n=164 ; UK winter intenders n=1353; Wales Inclusive winter intenders n=137 *Note: The research was conducted from 18th May to 12th June so these figures are likely to be an under-representation of the current bookings

Where planning on staying on next UK *summer* trip

- 11% of UK summer intenders plan on going to Wales for their next UK short break or holiday, the third most preferred destination behind the South West (19%) and Scotland (13%).
- Amongst Wales residents, Wales is the number one preferred destination, 31% planning to take a trip there, although only marginally ahead of the South West of England at 28%.
- It's worth noting that a third of people planning on visiting Wales this summer, are also considering visiting somewhere else, the South West of England and Yorkshire and the Humber the two most popular alternatives.

Figure 12. Where planning on staying on next UK overnight trip for summer intenders , Percentage Weeks 1-4, UK and Wales Residents



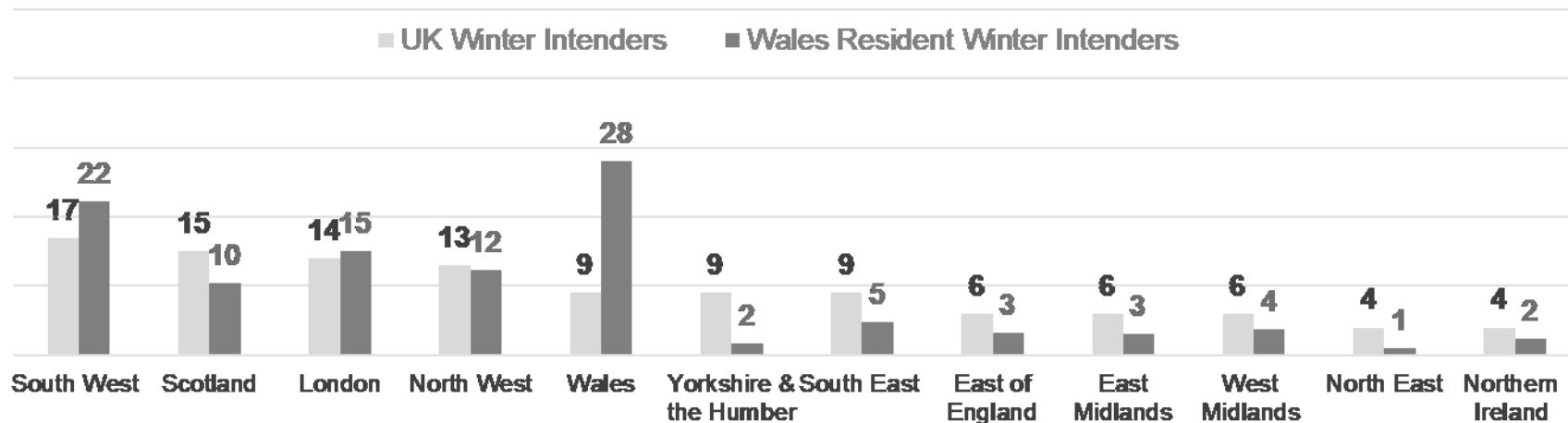
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK between summer UK Intenders n=1,453, Summer Wales Resident Intenders n=140

Where planning on staying on next UK *winter* short break or holiday

- Amongst UK winter intenders, Wales is the joint 5th most preferred destination behind the South West, Scotland, London and the North West of England.
- As in the summer months, Wales is the number one preferred winter destination for Wales residents, again followed by the South West of England.
- As within summer months it's worth noting that around a third (37%) of winter Wales Intenders are also considering another domestic destination

Figure 13. Where planning on staying on next UK overnight for winter intenders, Percentage, Weeks 1-4, UK and Wales



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

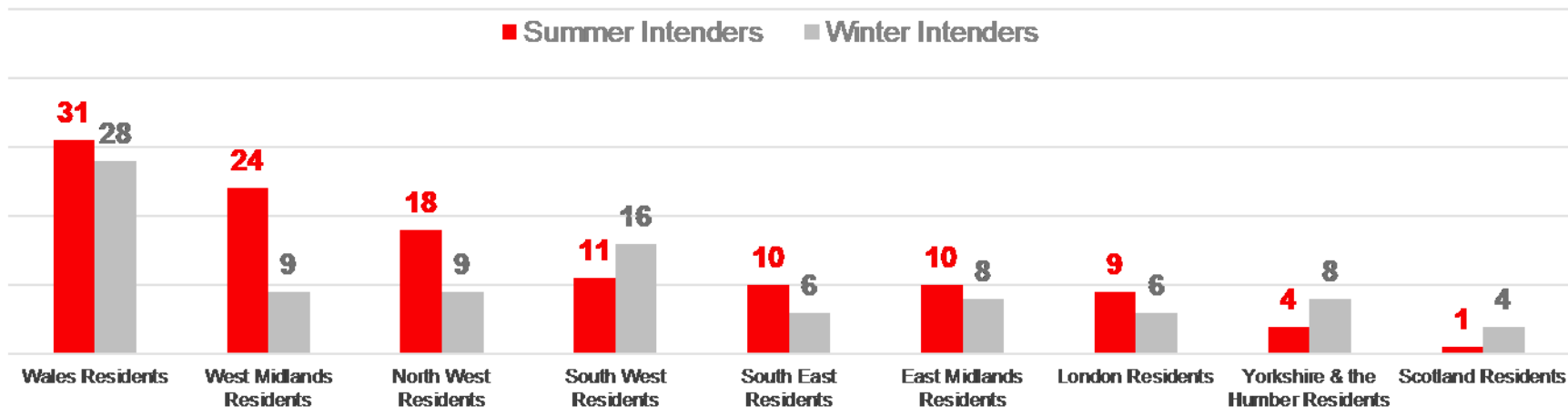
Base: All respondents planning on taking a holiday or short break in the UK winter UK Intenders n=1,353 winter Wales

Resident Intenders n=144

Intentions to stay in Wales by region of residence

- 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, residents of Wales and the South West are the most likely to visit

Figure 14. Proportion of intenders planning on staying in Wales on next UK holiday or short break by region of residence, Percentage Weeks 1-4, UK and Wales



C

Base: All residents planning on taking a holiday or short break in the U.K. between June-Sept/Oct-March. All n=1,453 residents in each region South West n= 104/98; Scotland n=176/173; Scotland n=176/144; North West n=135/107; London n=218/216; Yorkshire and The Humber n=113/112; South East n=169/175; West Midlands n=109/107; East Midlands n=97/85; East of England n=108; Wales n=140 *Base sizes low – treat with caution. Some regions excluded due to low base sizes

Demographics of intenders compared to the general population

- Families make up a higher proportion of people intending to visit Wales in the Summer and Winter periods than they do amongst the UK population. Older Independents make up a lower proportion intending to visit Wales in the summer, although they increase to average for visits to Wales in the winter.
- Retirement Aged visitors are more likely to intend to visit Wales in the summer than in the UK as a whole. Pre-nesters make up a slightly higher proportion of visitors to Wales, consistent with the UK picture
- Wales summer intenders index significantly higher on social grades C1C2 than the population, and UK intenders on the whole. Social grades DE have significantly lower representation than the UK population, which is consistent with UK intender patterns. Social grades AB make up a significantly higher proportion of visitors to Wales in the winter

Figure 15. Breakdown of populations and intenders by life stage, Percentage Weeks 1-4, UK and Wales

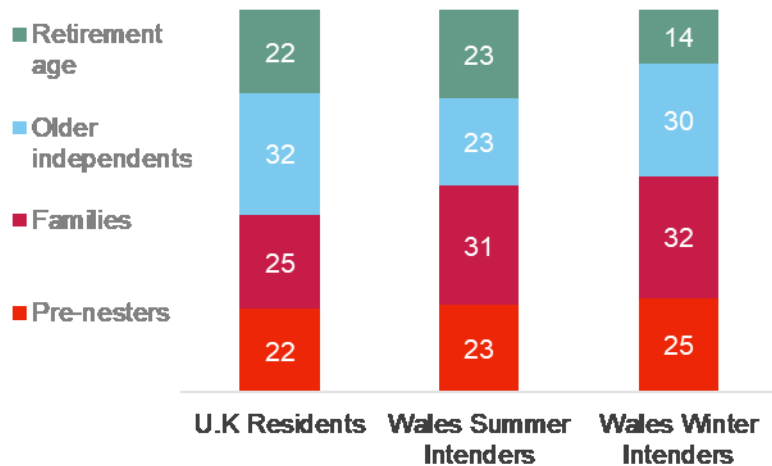
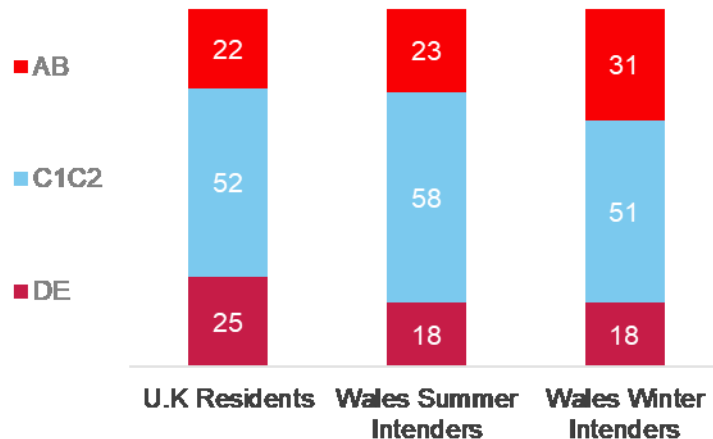


Figure 16. Breakdown of populations and intenders by social grade, Percentage Weeks 1-4, UK and Wales



Life stage and social grade combined

- C1C2 families and AB families both index higher amongst Wales summer intenders than they do in the general population, as do C1C2 pre-nesters
- C1C2 and AB families are also well-represented amongst winter intenders, although C1C2 Older Independents are the largest in this time period

Table 1. Life stage and social grade combined, Percentage, Weeks 1-4, UK

	UK Population	Wales summer intenders	Wales winter intenders
Retirement age - DE	10%	9%	4%
Retirement age - C1C2	8%	12%	4%
Retirement age - AB	4%	2%	6%
Older Independents - DE	7%	4%	4%
Older Independents - C1C2	19%	13%	20%
Older Independents - AB	6%	6%	6%
Families - DE	3%	2%	3%
Families - C1C2	14%	17%	14%
Families - AB	8%	12%	14%
Pre-nesters - DE	5%	3%	7%
Pre-nesters - C1C2	12%	16%	13%
Pre-nesters - AB	5%	3%	5%

Source: Demographic questions. Base: All respondents. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

Financial segments and financial impact of COVID-19 on intenders

- Wales residents' financial impact as a result of COVID-19 is consistent with the experience of the UK population.
- As with UK intenders, Wales summer intenders are significantly more likely than residents to state that they have not been affected financially or that they are better off than before. This is also the case for Wales winter intenders, although to a lesser degree.
- People who state they need to be careful with their finances have lower than average intention to take UK holidays or breaks, but still make up a substantial proportion of visitors intending to visit Wales and affordable holidays may be a particular concern for these travellers.

Figure 17. Breakdown of intenders by financial segments, Percentage Weeks 1-4, UK and Wales

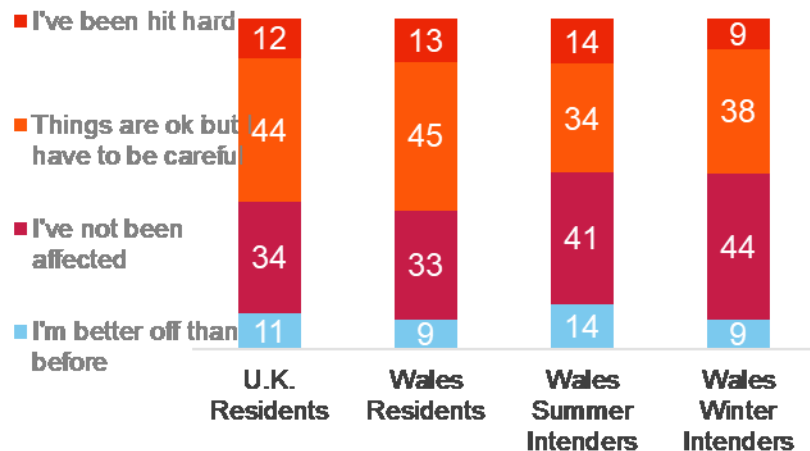
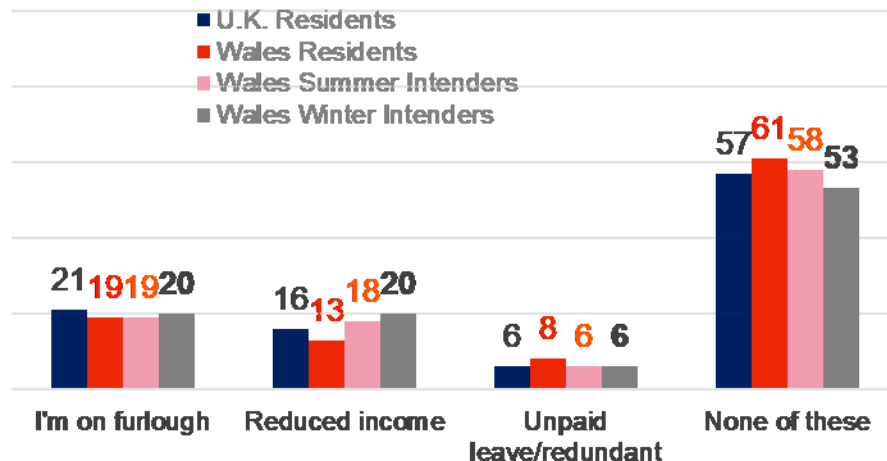


Figure 18. Employment impact on intenders, Percentage Weeks 1-4, UK and Wales



Q17. ... 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. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

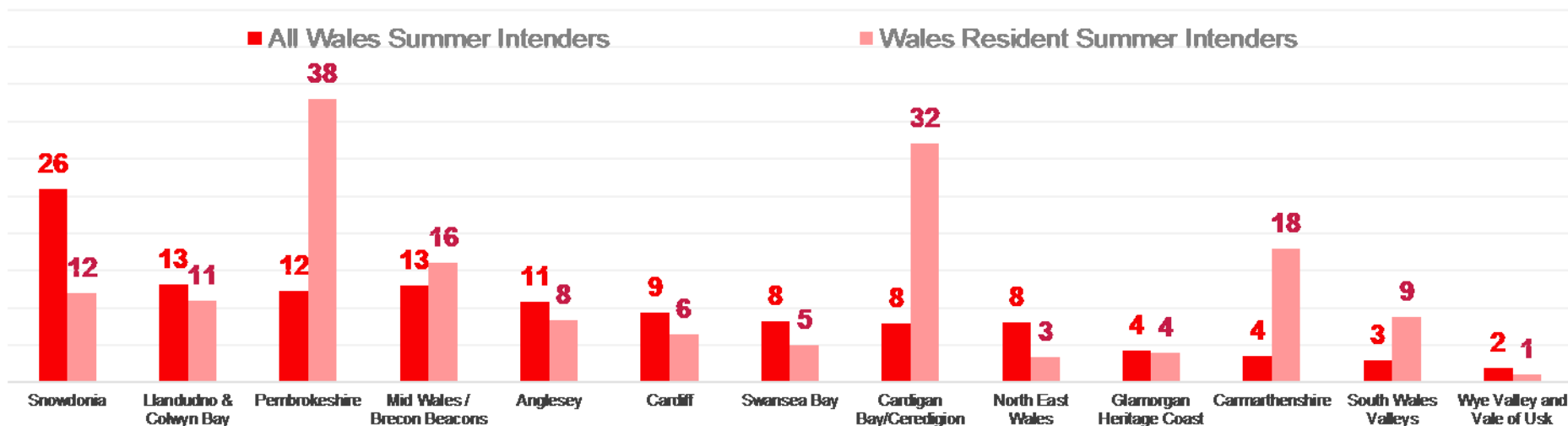
Trip behaviour



Where planning on staying in Wales on next Wales summer trip

- There are some notable differences in intentions to visit different parts of Wales between residents living in Wales and people intending to visit Wales from the UK as a whole.
- Snowdonia is the most popular destination for all Wales summer intenders, followed by Llandudno and Colwyn Bay, and Pembrokeshire.
- Amongst Wales residents planning on a summer trip in Wales, Pembrokeshire and Cardigan Bay/Ceredigion are the most popular destinations followed by Carmarthenshire.

Figure 19. Planned destination for next Wales trip for summer intenders , Percentage Weeks 1-4, UK and Wales



QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?8

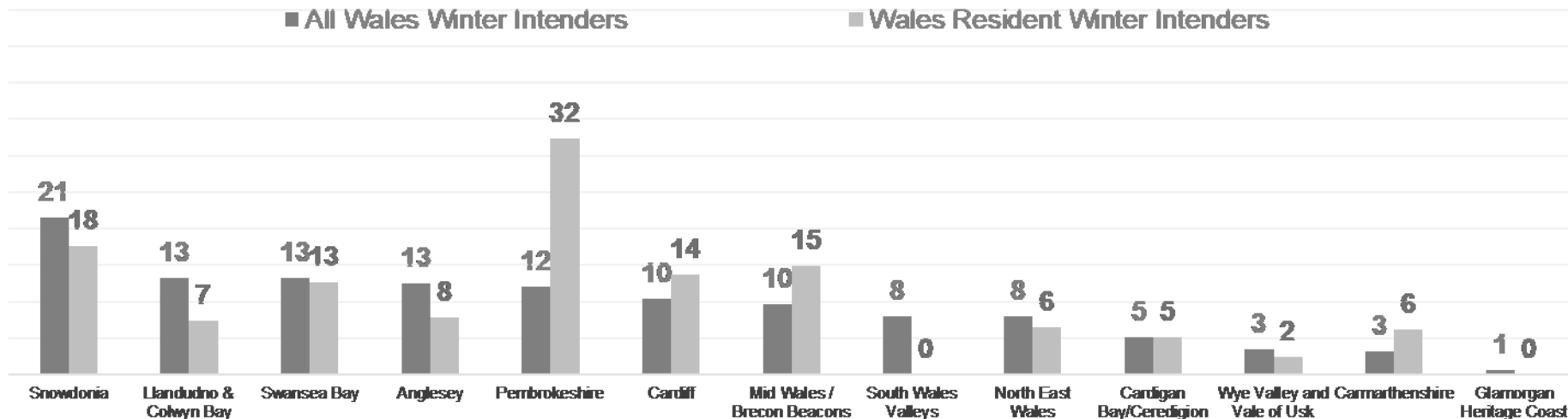
Base: All respondents planning on taking a holiday or short break in Wales. All Wales summer intenders n=158; Wales

Resident summer intenders n=40*;

Where planning on staying in Wales on next Wales winter trip

- The pattern in winter is relatively consistent with the summer – North Wales destinations such as Snowdonia and Llandudno/Colwyn Bay are the preferred amongst all Wales Intenders, whereas West Wales destinations such as Pembrokeshire and Mid Wales/ Brecon Beacons are more popular destinations amongst Wales residents

Figure 20. Planned destination for next Wales trip for winter intenders, Percentage, Weeks 1-4, UK and Wales



QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?

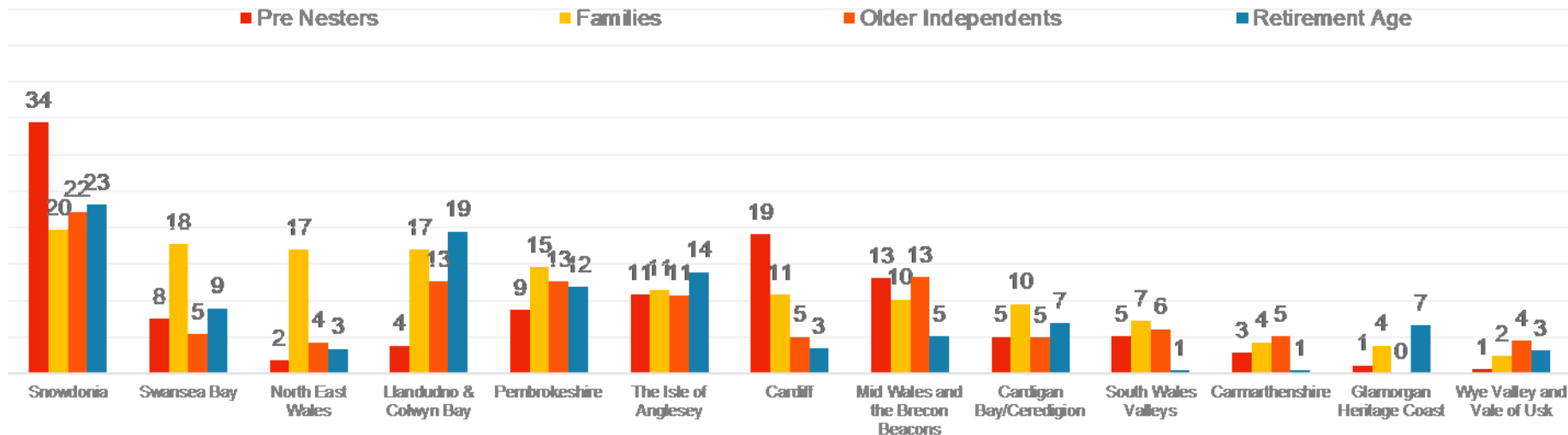
Base: All respondents planning on taking a holiday or short break in Wales. All Wales winter intenders n=137; Wales

Resident winter intenders n=44* *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

- Visit destinations within Wales vary across life stages – pre-nesters are most likely to state they are intending to go to Snowdonia and Cardiff; Families most likely to visit Snowdonia, North East Wales, Llandudno and Colwyn Bay and Swansea Bay; Older Independents - Snowdonia, Mid Wales and Llandudno and Colwyn Bay; Empty Nesters - Snowdonia , Llandudno and Colwyn Bay and the Isle of Anglesey.

Figure 21. Planned destination for next Wales trip for all intenders by life stage, Percentage, Weeks 1-4, UK and Wales, Ranked on families



QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?

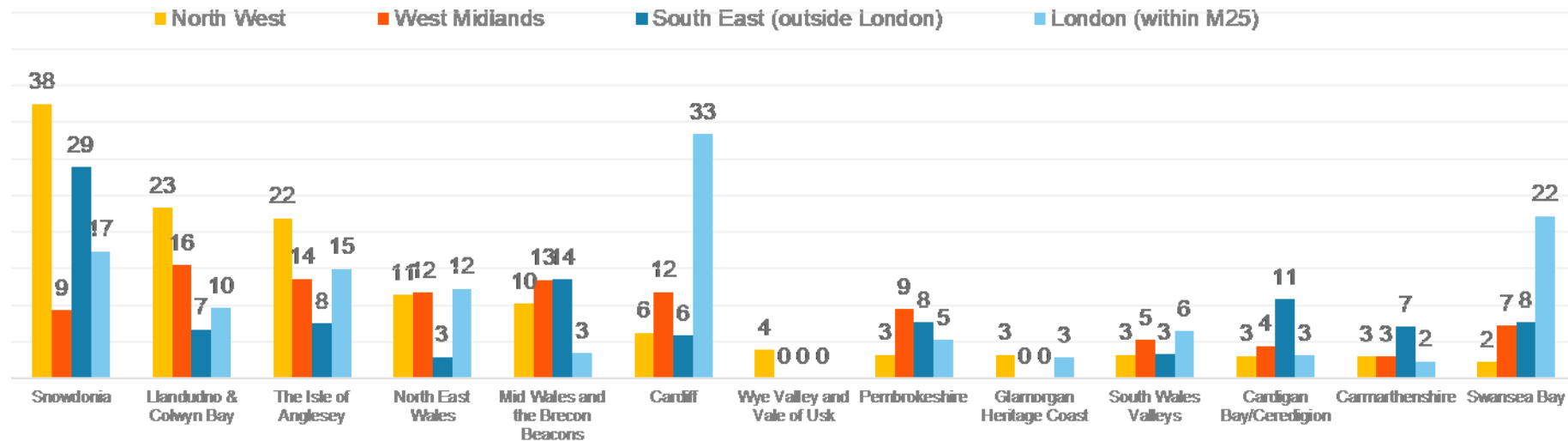
Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021 Pre-nesters

n=73; Families n=92; Older Independents n=85; Empty Nesters 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 Snowdonia, Llandudno, 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 likely to visit a mix of North and South Wales destinations - Cardiff, Swansea Bay, Snowdonia and Anglesey each featuring in their top four. There is similar variation for visitors from the South East of England– Snowdonia, Mid Wales and Cardigan Bay each featuring highly.

Figure 22. Planned destination for next Wales trip for all intenders by key regions, Percentage, Weeks 1-4, UK and Wales, Ranked on North West



Q12: Where in Wales do you expect to be staying on your next holiday or short break?

Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021 West Midlands n=37*; North West n=33*; South East n=27*; London n=32*. *Base sizes very small. Use indicatively only

Type of destination for next UK short break or holiday

- Visitors to Wales in the summer months are most likely to visit a countryside or village destination, followed by traditional coastal/seaside town and rural coastline. Mountains or hills are likely to generate visits from around 1 in 7, higher than the UK average
- Winter intenders are significantly more likely to intend to visit rural coastline and mountains or hills than summer intenders, and than UK intenders
- People intending to visit Wales are less likely to be visiting a city or large town compared to other UK destinations and these make up a relatively small proportion of intended trips to Wales.

Figure 23. Main type of destination for Wales summer intenders, Percentage Weeks 1-4, UK

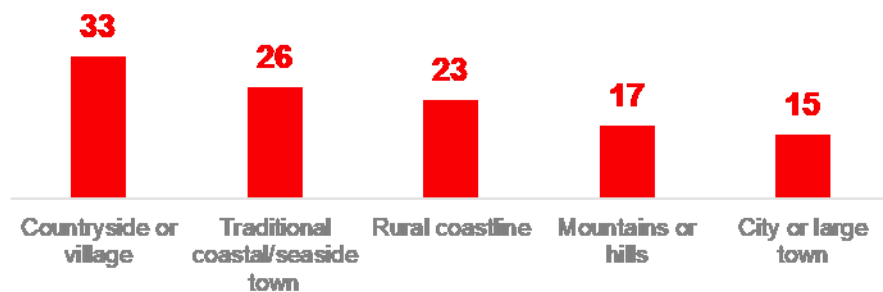
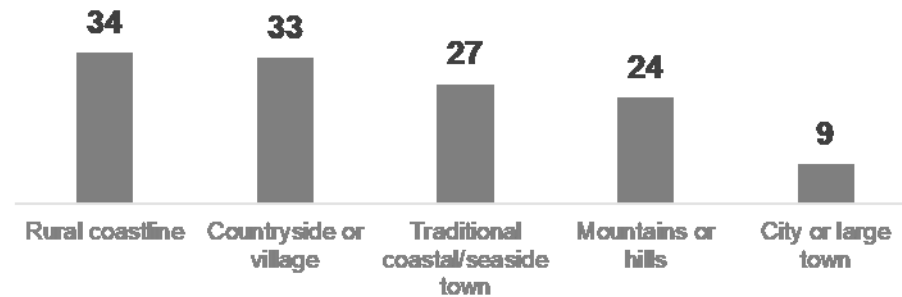


Figure 24. Main type of destination for Wales winter intenders, Percentage Weeks 1-4, UK



QVE04: Which of the following best describes the main type of destination you are likely to stay in during your UK trip?

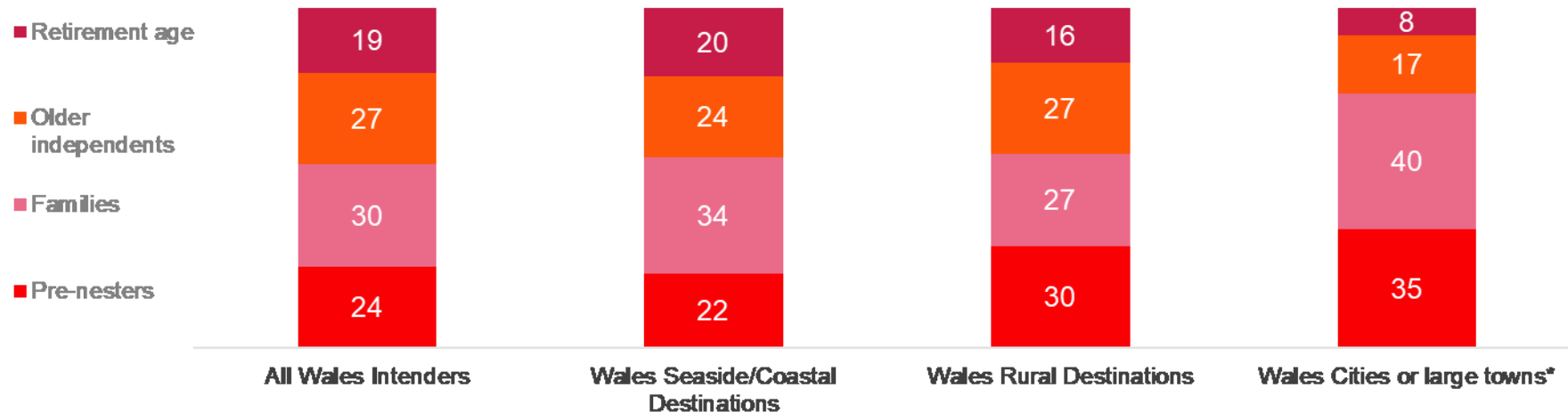
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=105;

Wales Exclusive winter intenders n=88

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

- The types of destination intended to visit in Wales varies by life stage
- Retirement age visitors and older independents are most likely to visit 'seaside/coastal destinations' and 'rural destinations'.
- Families have the highest representation in Wales seaside/coastal destinations
- Pre-nesters have the highest representation in Wales' cities and large towns

Figure 25. Life stage of Wales intenders by destination type, Percentage, Weeks 1-4, UK



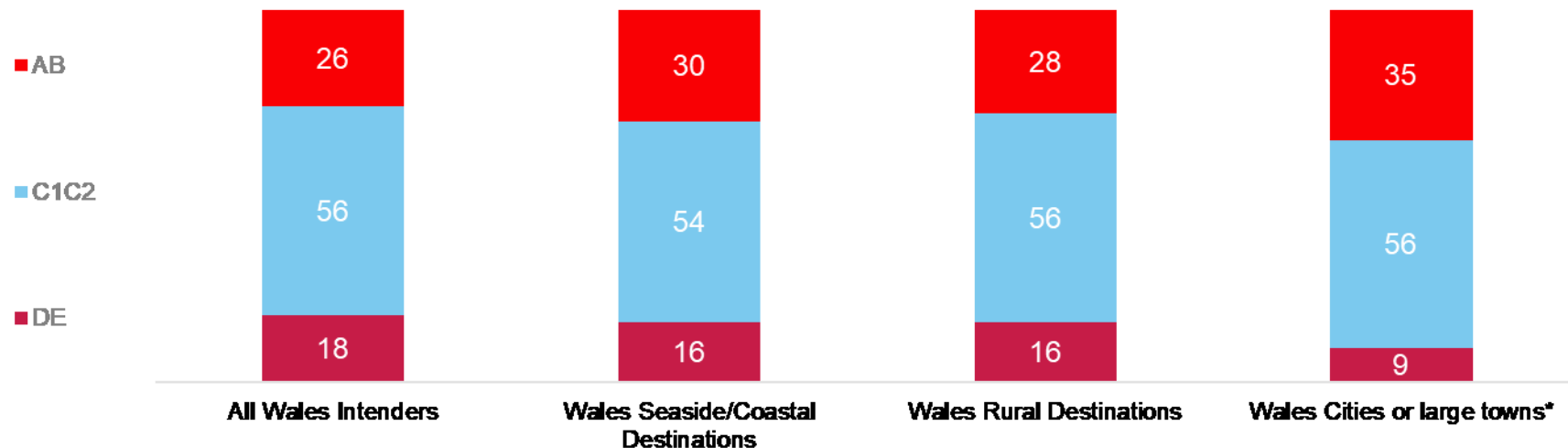
De

stay in during your UK trip? Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=154; Wales Rural Destinations (Countryside or village + mountains or hills) n=158; Wales Cities or large towns n=46* *Note: very small base sizes – please treat indicatively.

Social grade of Wales intenders - *by destination type*

- C1C2s have the highest representation across all destination types, although ABs have the highest representation in Wales' cities and large towns.

Figure 26. Social grade of Wales intenders by destination type, Percentage Weeks 1-4, UK



Del. reg. online questions and survey. Which of the following best describes the main type of accommodation you are likely to stay in during your UK trip? Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=154; Wales Rural Destinations (Countryside or village + mountains or hills) n=158; Wales Cities or large towns n=46* *Note: very small base sizes – please treat indicatively.

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 and friends. The pattern is relatively consistent with the picture amongst UK intenders. The high incidence of varying combinations of family visitors suggests multi-generational trips may be an option across for some both time periods
- Solo travellers make up a small proportion of intended to visitors to Wales.
- Nearly one in ten summer trip intenders are planning to travel with a pet.

Figure 27. Visitor party make-up for Wales summer intenders, Percentage Weeks 1-4, UK

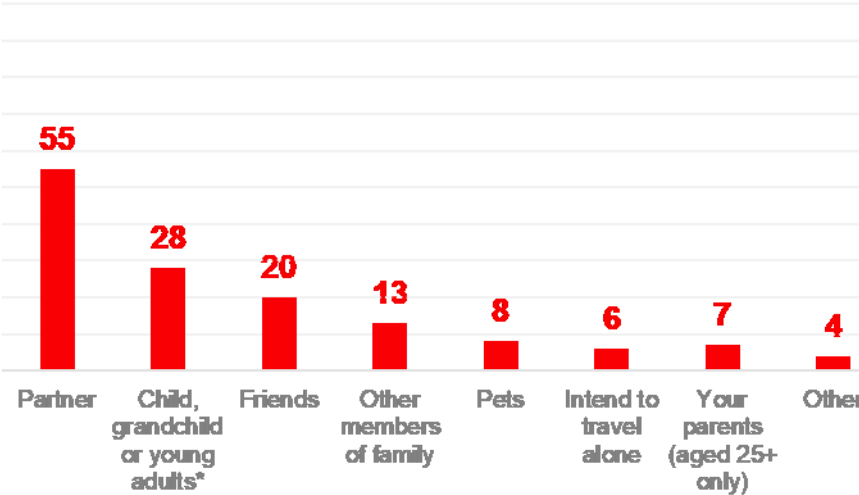
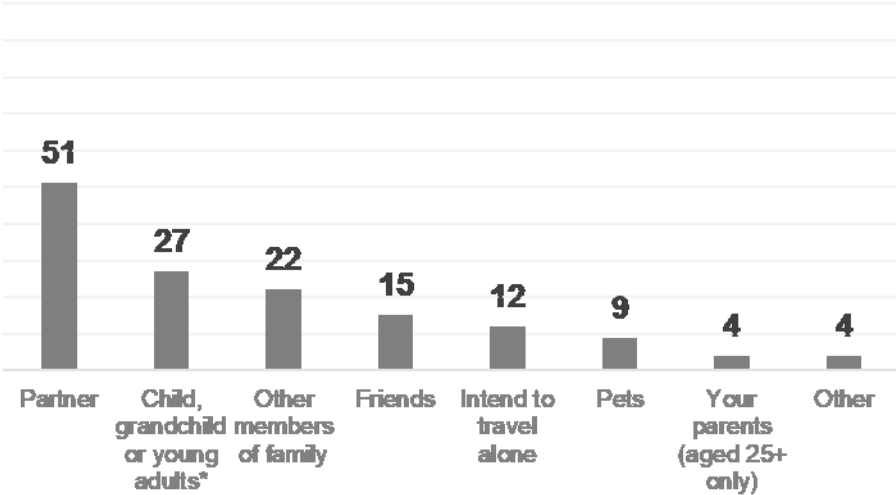


Figure 28. Visitor party make-up for Wales winter intenders, Percentage Weeks 1-4, UK



QVB
Base: All respondents planning on taking a holiday or short break in Wales. Wales
Wales Exclusive winter intenders n=88 *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 children or young adults.
- Children or young adults have the highest representation in Wales Seaside/Coastal destinations, as do other family members, suggesting this type of venue offers potential for multi-generational trips
- Friends have the highest representation in rural destinations.

Table 2. Visitor party by destination type for Wales intenders, Percentage, Weeks 1-4, UK

	All Wales Intenders	Wales Seaside/ Coastal Destinations	Wales Rural Destinations
Your partner	54%	50%	53%
Children or young adults (aged 16-24)	26%	30%	22%
Friend/s	18%	8%	21%
With parents of older adults	5%	4%	3%
Other family member	17%	26%	8%
Pets	8%	11%	9%
Will travel alone	9%	6%	13%
Other	3%	2%	4%

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 UK trip? Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? Base: All respondents planning exclusively on taking a holiday or short break in Wales between June 2020 and March 2021. Wales Seaside destinations exclusive (rural coastline + traditional seaside/coastal town) n=73; Wales Rural Destinations (Countryside or village + mountains or hills) n=75;; Wales Cities or large towns not shown due to small base sizes

Type of accommodation for next Wales short break or holiday

- Visitors to Wales plan on visiting a mix of different accommodation types this summer, commercial self-catering rental, caravan/camping, a private home and hotels all options for around 3 in 10.
- From the winter onwards, a private home is the preferred option– this is likely driven by the higher make-up of older independents in the winter period.
- As expected, there are notably lower levels of intention to stay in caravan and camping in the winter period

Figure 29. Accommodation planning on staying in on next UK overnight trip for Wales summer intenders, Net percentage Weeks 1-4, UK

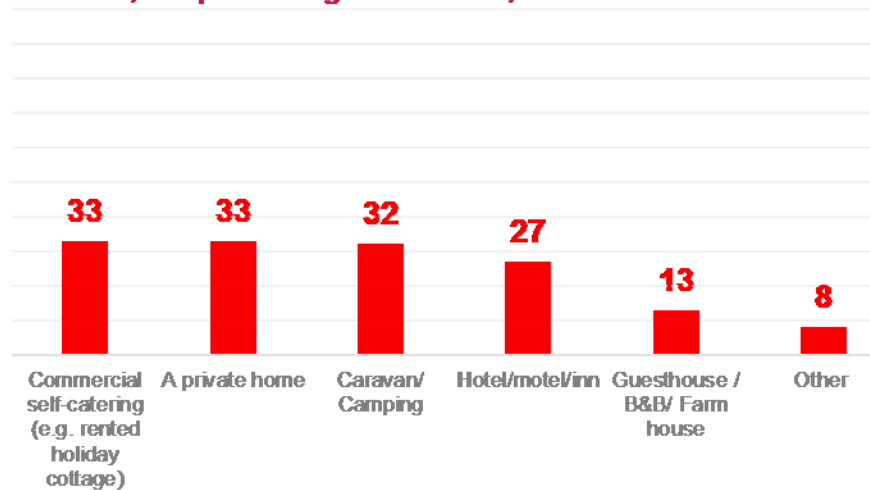
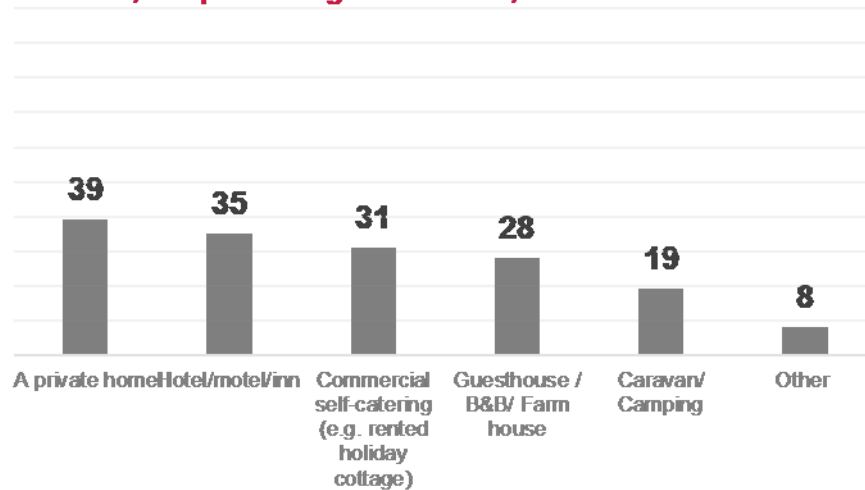


Figure 30. Accommodation planning on staying in on next UK overnight trip for Wales winter intenders, Net percentage Weeks 1-4, UK



QVB6a.

Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive summer intenders n=100; Wales Exclusive winter intenders n=88
Commercial accommodation: 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)

Type of accommodation for next Wales short break or holiday

- Of the different options for camping/caravanning trips, summer Wales intenders are most likely to anticipate staying in a static caravan, followed by tent and then touring caravan. Winter Intenders are less likely to stay in camping/caravanning accommodation more generally
- 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 31. Type of camping/caravanning accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 1-4, UK

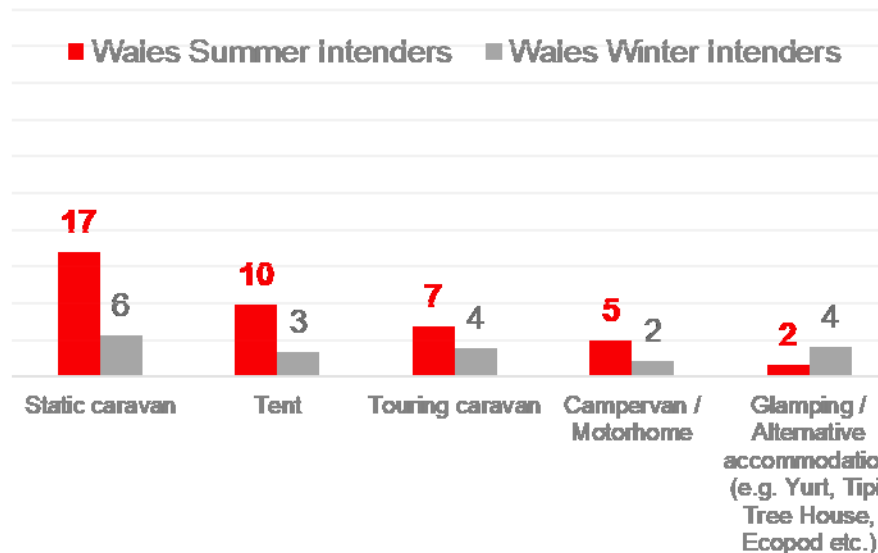
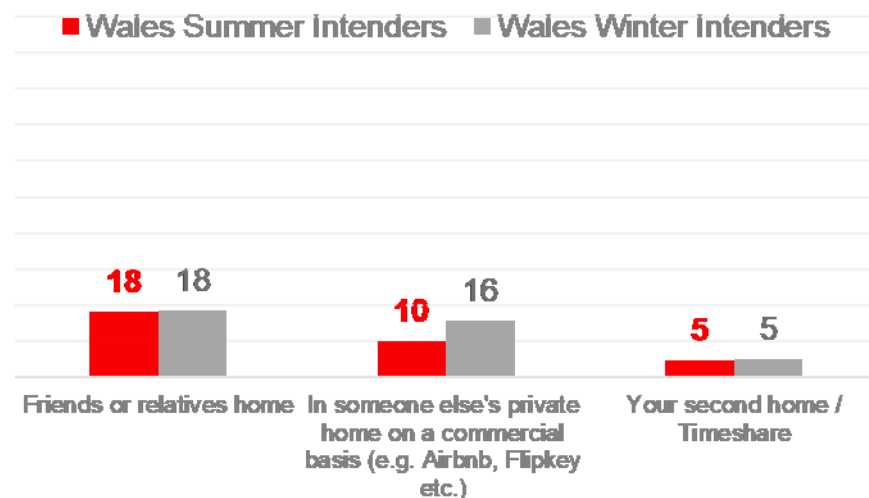


Figure 32. Type of private home accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 1-4, UK



Accommodation preference of Wales intenders – *by destination type*

- Wales seaside/coastal destinations are most likely to involve caravan/camping stays and private home stays. For rural holidays, commercial rental and hotel/motels are the preferred options

Table 3. Accommodation type by destination type for Wales intenders, Percentage, Weeks 1-4, UK

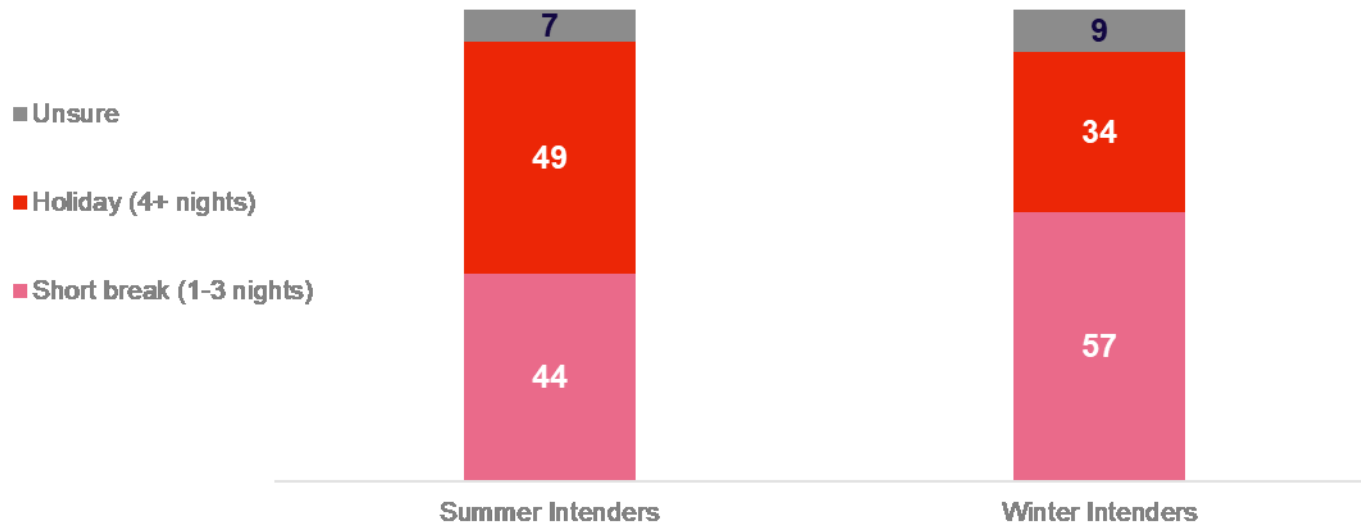
	All Wales Intenders	Wales Seaside/ Coastal Destinations	Wales Rural Destinations
Caravan/Camping	26%	31%	21%
A private home	35%	31%	26%
Hotel/ motel/ inn	31%	22%	33%
Commercial self-catering	32%	26%	37%
Guesthouse/ B&B / Farmhouse	19%	20%	10%
Other	8%	4%	10%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB5 Which of the following best describes the main types of destination you are likely to stay in during your UK trip? Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=64; Wales Rural Destinations (Countryside or village + mountains or hills) n=59; Wales Cities or large towns not shown due to small base sizes

Anticipated length of Wales holidays by time period

- Trips to Wales in the summer months are more likely to be holidays of 4+ nights, compared to winter trips (50% compared to 34%).
- Wales is second only to the South West of England in generating longer holidays of 4+ nights this summer

Figure 33. Length of next holiday or short break in Wales by time period, Percentage Weeks 1-4, UK



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=102; Wales Exclusive winter intenders n=88

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

- Longer trips to Wales are comprised of a higher proportion of retirees and DE social grades (two groups that overlap considerably)
- Mid market C1C2 travellers are also more likely to be planning a longer holiday in Wales..
- Older Independents and AB markets are more likely to be intending to take short breaks in the summer in Wales.

Figure 34. Life stage breakdown of Wales summer intenders by trip length, Percentage Weeks 1-4, UK

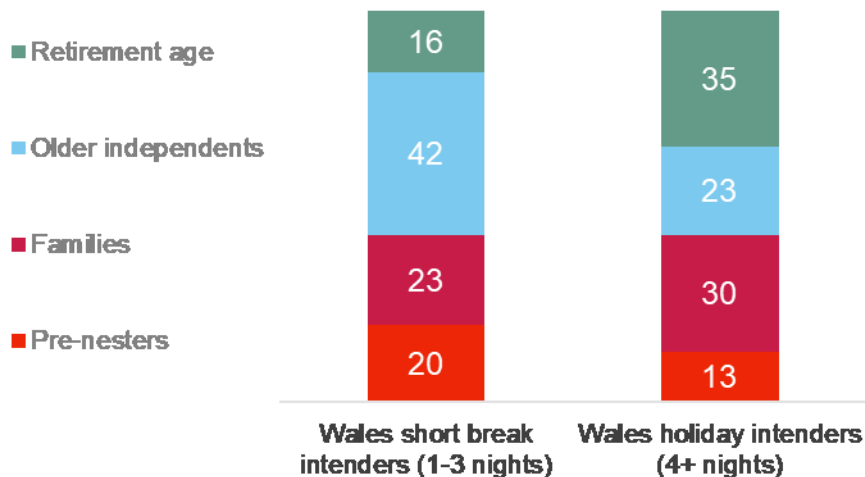
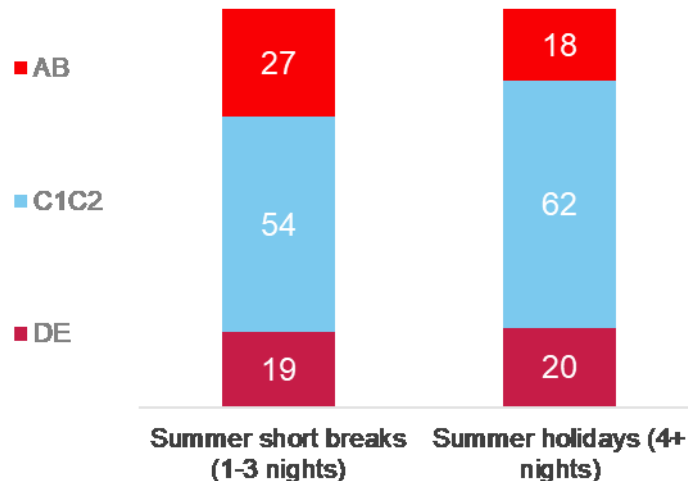


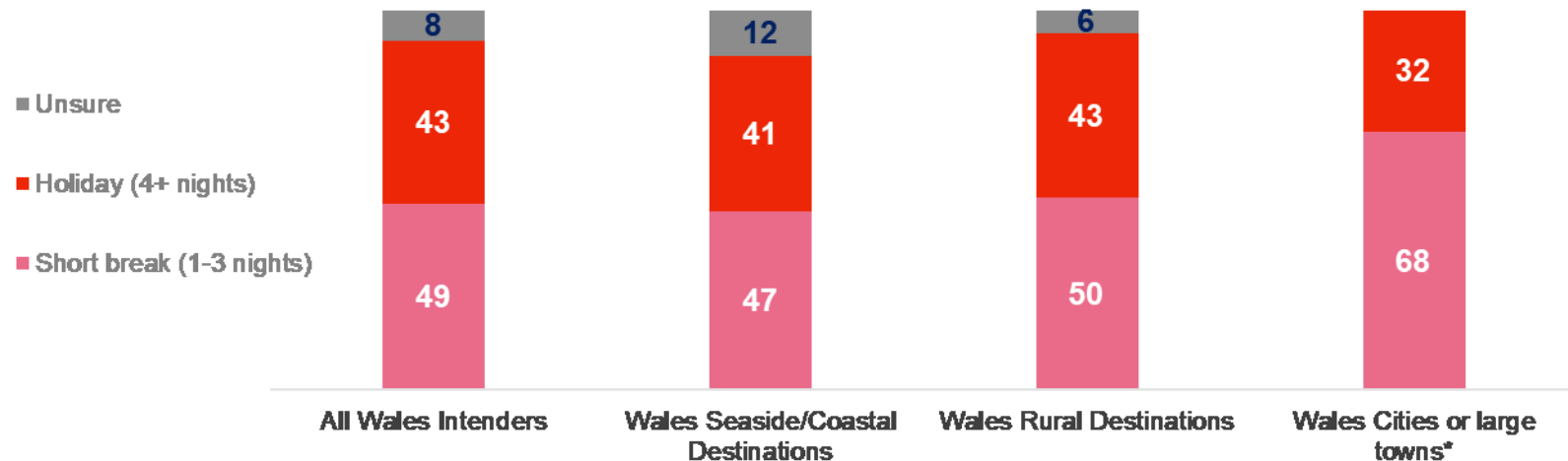
Figure 35. Social grade breakdown of Wales summer intenders by trip length, Percentage, Weeks 1-4, UK



Trip length of intenders – *by destination type*

- Across the whole year, all types of trips are more likely to be short breaks than holidays (4+ nights) although this is most likely to be the case for trips to cities and towns

Figure 36. Length of next Summer Wales holiday or short break by destination type, Percentage Week 1-4, UK



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 UK trip? Base: All respondents planning on taking a holiday or short break in Wales between June 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=64; Wales Rural Destinations (Countryside or village + mountains or hills) n=59; Wales Cities or large towns not shown due to small base sizes

Anticipated spend on next UK and Wales holiday or short break

- Anticipated spend on Wales holidays and short breaks is significantly lower than UK trips, £512 compared to £621
- The lower average spend is attributable to fewer high spend (£1000+) trips in Wales compared to the UK as a whole.
- The lower spend may reflect a higher intention to visit rural and seaside destinations, private homes and caravan and camping trips, with Wales offering a relatively affordable option for many budget conscious travellers.

Figure 37. Anticipated spend for UK and Wales summer intenders, Percentage Weeks 1-4, UK

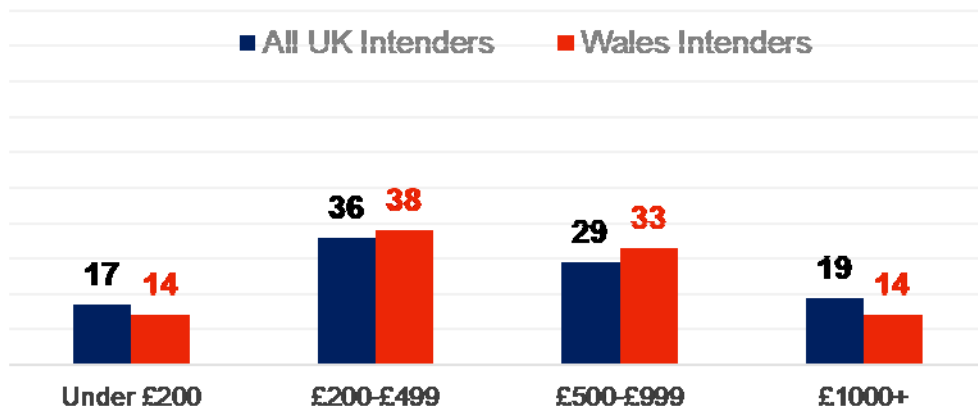
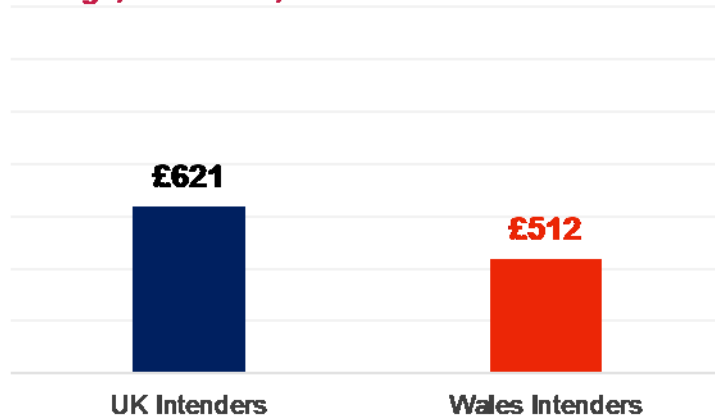


Figure 38. Anticipated average spend for UK and Wales summer intenders, Average, Weeks 1-4, UK



QVB6

Base:

n=672; All Wales Intenders n=47*

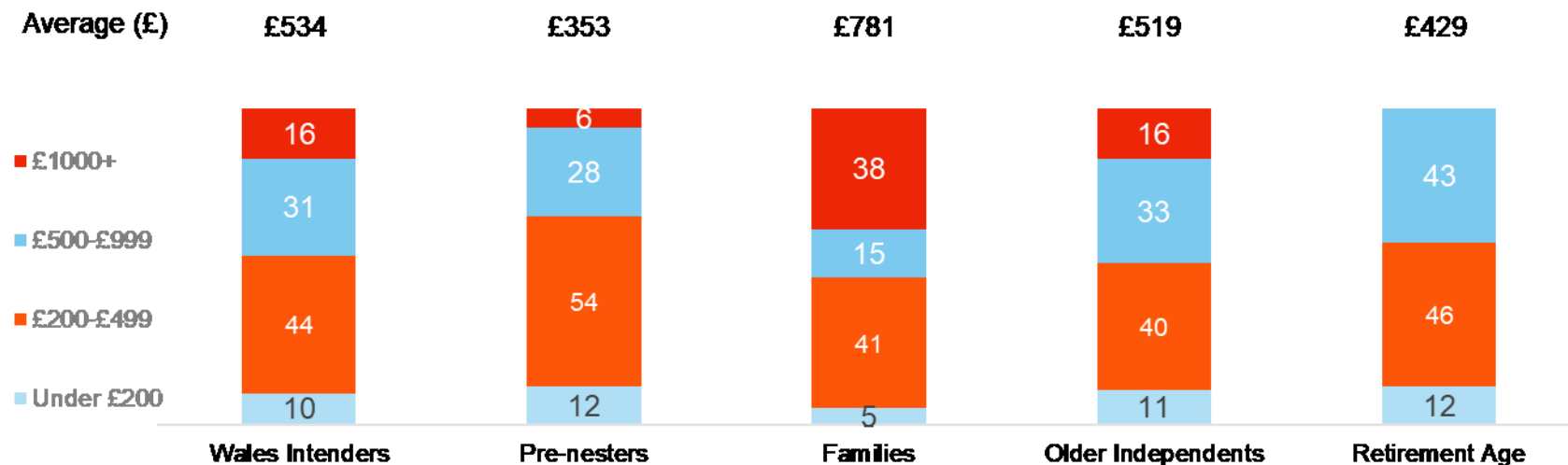
to March 2021 All UK Intenders

NOTE: QUESTION ONLY ADDED FROM WEEK 3, THEREFORE LOW BASE SIZE, TREAT WITH CAUTION

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 and those of retirement age. Pre-nesters are likely to generate the lowest spend, perhaps linked to 'financial barriers' being a bigger barrier to travel, and their choice of more 'low-budget' accommodation choices.

Figure 39. Anticipated trip spend for Wales intenders by life stage, Average, Percentage Weeks 1-4, UK



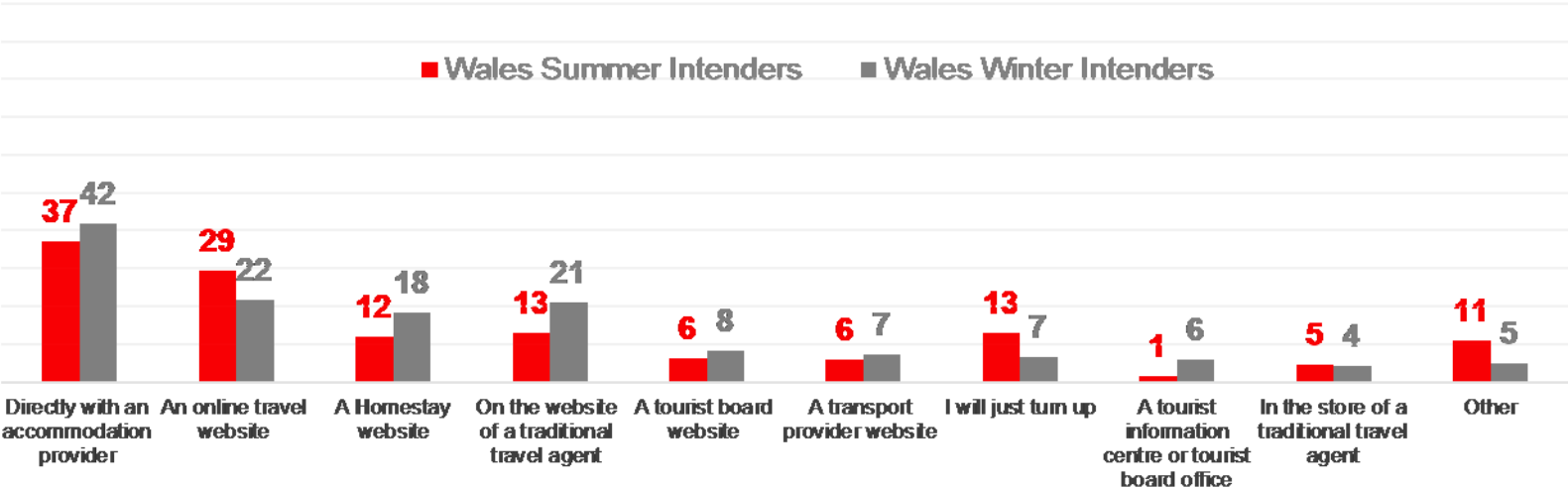
QVB6e. Approximately how much do you think this trip will cost in total?

Base: All respondents planning on taking a holiday or short break in Wales between June and March. Winter Intenders n=79; Pre-nesters n=18*, Families n=22*; Older independents n=25*, Empty Nesters n=15* *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). Homestay websites appear to be more popular in the winter period, perhaps reflecting the greater preference for this type of accommodation
- There are a small proportion (13%) of people intending to visit Wales without prior booking, but these are predominantly individuals staying either at friends or relatives or in their own static caravan

Figure 40. Accommodation booking channel for Wales summer intenders, Net percentage Weeks 1-4, UK

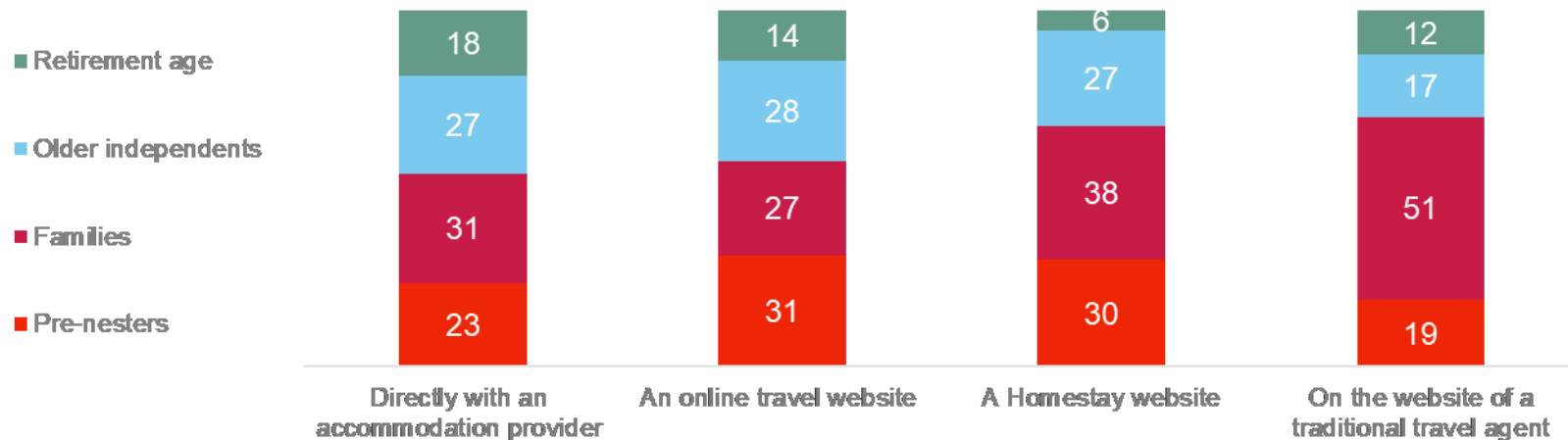


VB6d. I
Base: All respondents planning on taking a holiday or short break in Wales. Wales Inclusive summer intenders n=158; Wales Exclusive winter intenders n=137

Breakdown of booking channel for trip to Wales by life stage

- Booking channels have varying representation amongst life stages – those of retirement age have the highest representation in booking directly with the accommodation. Older independents are also likely to book directly, but unlike those of retirement age, index relatively high in booking via OTAs.
- Pre-nesters are most likely to book via OTAs or homestay websites; families amongst homestay websites and traditional travel agent websites.

Figure 41. Life stage breakdown of intenders booking channel, Percentage Weeks 1-4, UK



Demographic questions and VB6d. How would you ideally book or have you already booked your accommodation for your UK trip Base: All respondents planning on taking a holiday or short break in Wales Directly with accommodation n=108; Online Travel agent n=80; Homestay website n=43; Website of a traditional travel agent n=50

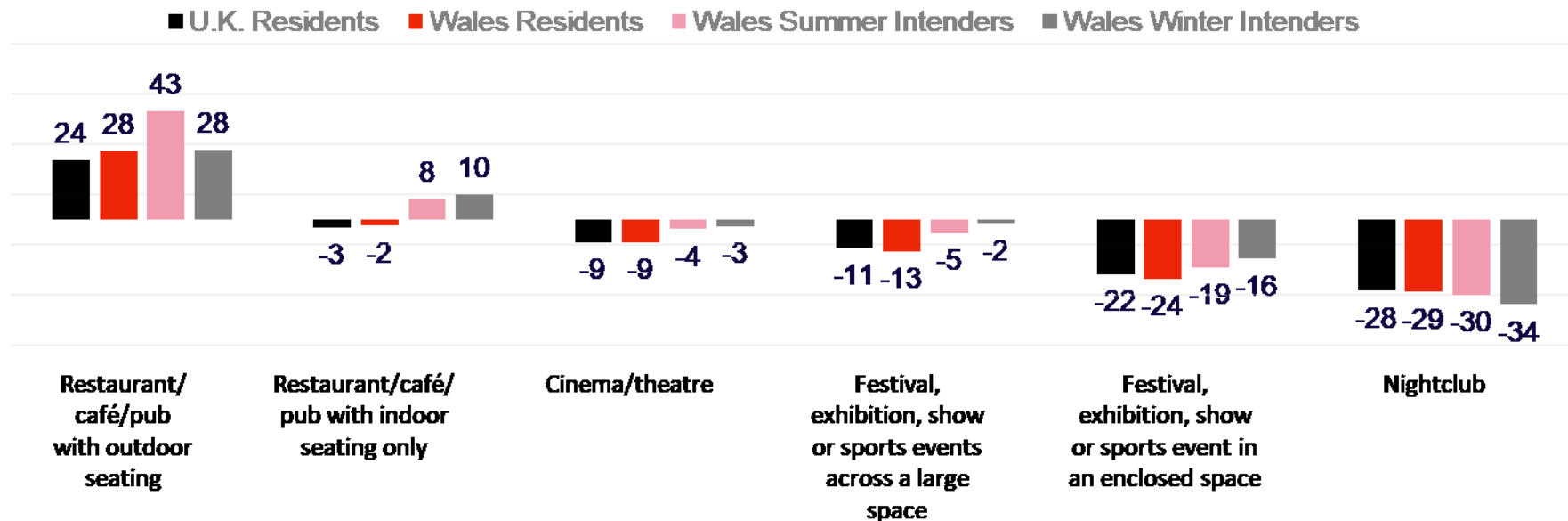
Activity engagement post lockdown



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.
- People intending to visit Wales for a holiday or break in the Summer and Winter also anticipate engaging in more visits to indoor restaurants/cafes/pubs, although this is not the case with the general population as a whole, indicating it is an important factor for visitors to be able to do.
- All audiences anticipate fewer visits to the cinema/theatre, festivals and nightclubs.

Figure 42. 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 1 to 4, UK and Wales

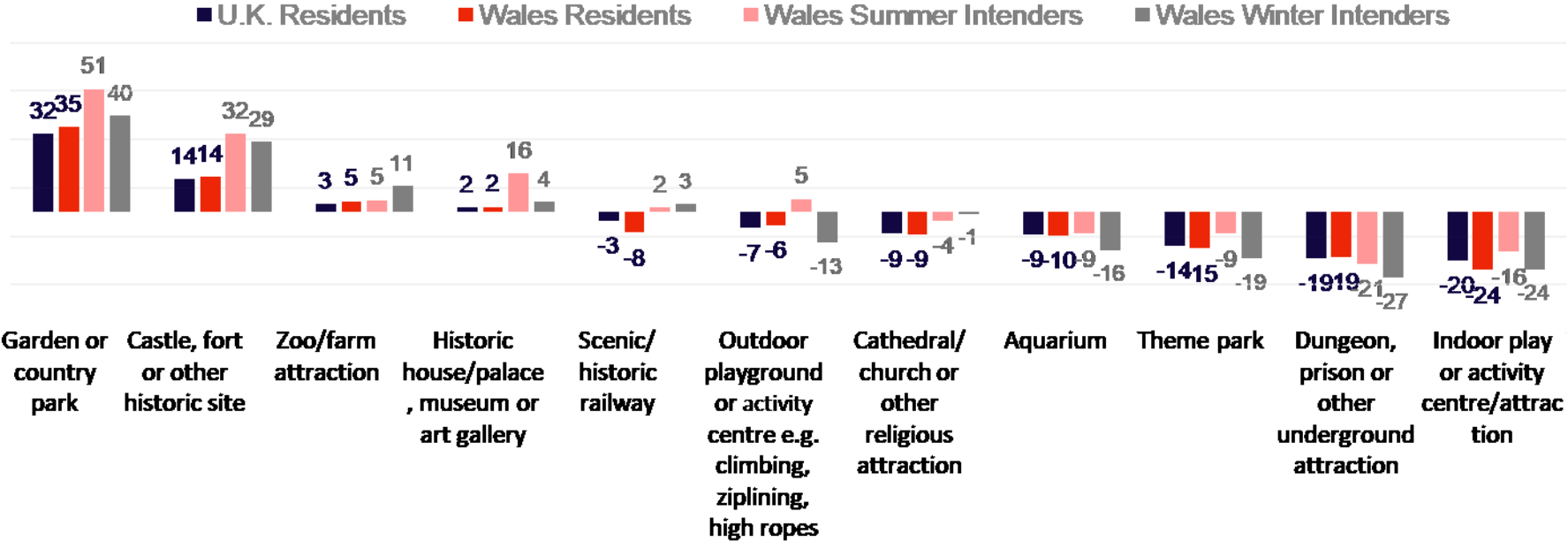


QV69ar0B r0ar0B. which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

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/forts. There is a general expectation of conducting less visits to indoor attractions, particularly those in small spaces (e.g. dungeons) or with a hands-on element at their core (e.g. indoor play or activity centres)

Figure 43. Visitor attractions more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 1 to 4, UK and Wales

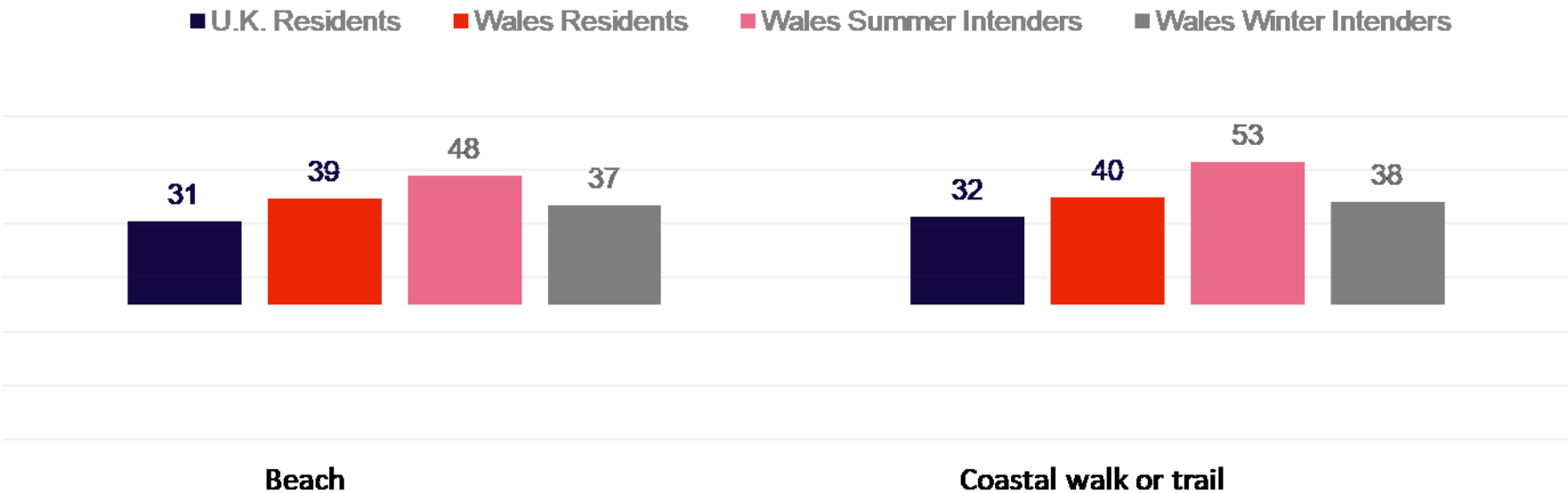


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (visitors and residents) are more likely to visit outdoor areas such as beaches and coastal walks/trails

Figure 44. Outdoor areas more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 1 to 4, UK and Wales

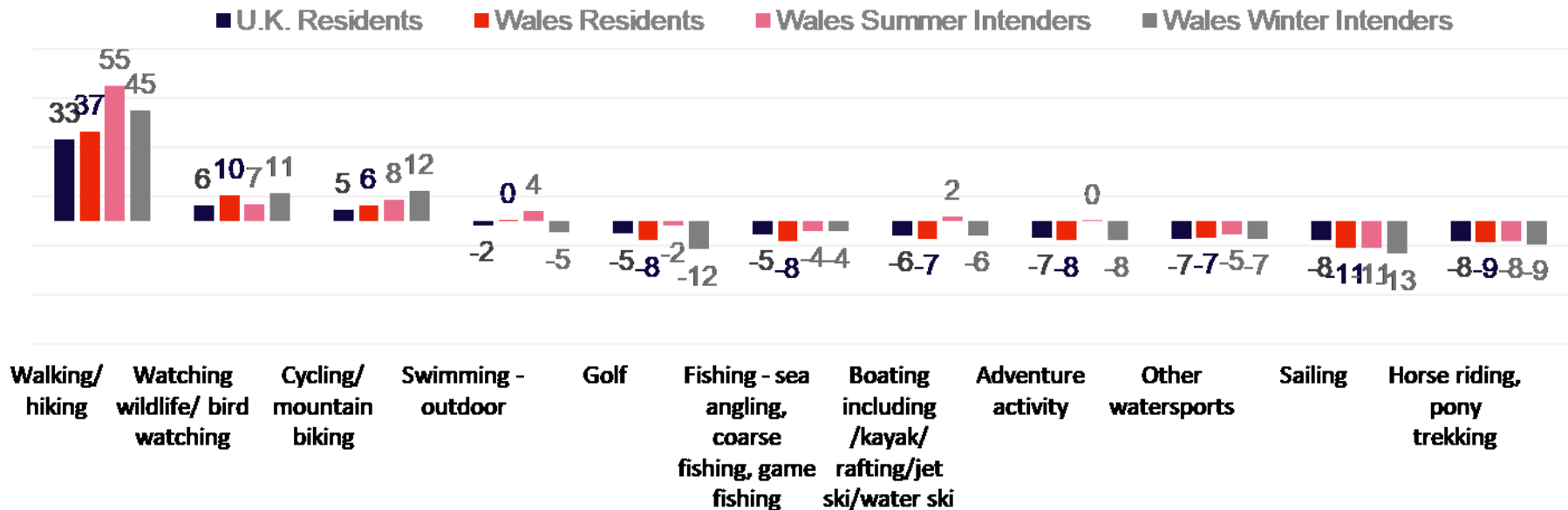


QV Beach and Coastal walk or trail. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/visit as restrictions are lifted? Base: All respondents. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

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 are higher expectations to do these amongst Wales visitors.
- There is also a small 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 other outdoor activities

Figure 45. Outdoor activities more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 1 to 4, UK and Wales

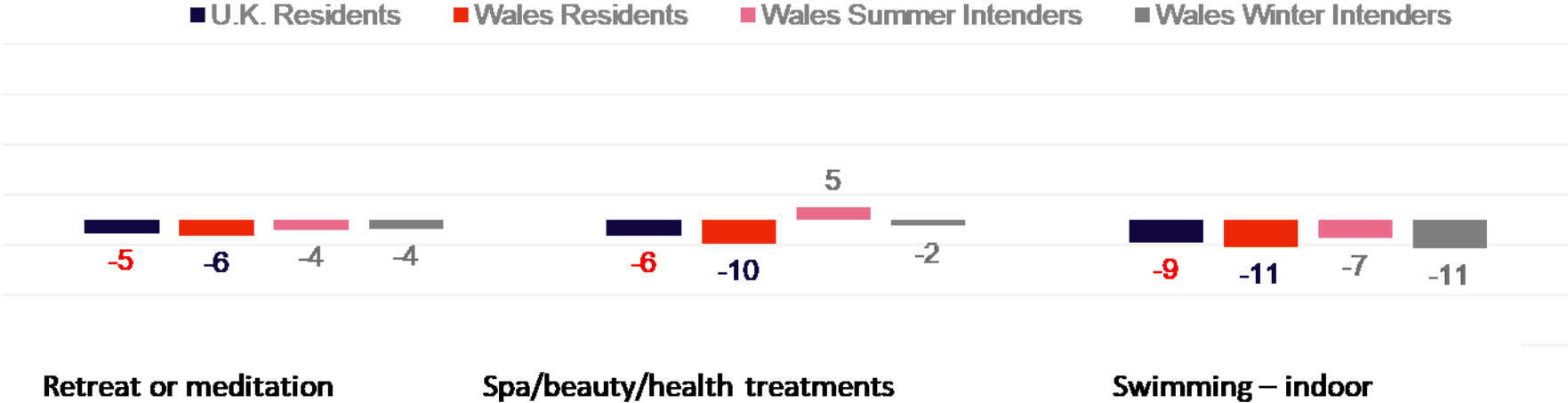


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. UK population n=7008; Wales population n=766; Wales summer intenders Inclusive n=158; Wales winter intenders Inclusive n=137

General leisure activity intentions as lockdown restrictions are lifted

- In general, both visitors and residents currently indicate lower than normal expectation to undertake swimming or health and beauty treatments as restrictions are lifted, reflecting current nervousness with close personal contact due to Coivd-19
- People intending to visit Wales in the summer show a slightly higher expectation to undertake all activities, in particular 'spa/beauty/health treatments' with a net positive intention (25% anticipating doing more and 20% anticipating doing less).

Figure 46. Indoor health and wellness more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 1 to 4, UK and Wales



QVE
as restrictions are lifted. Base: All respondents. UK population n=7000, Wales population n=700, Wales summer intenders
Inclusive n=158; Wales winter intenders Inclusive n=137

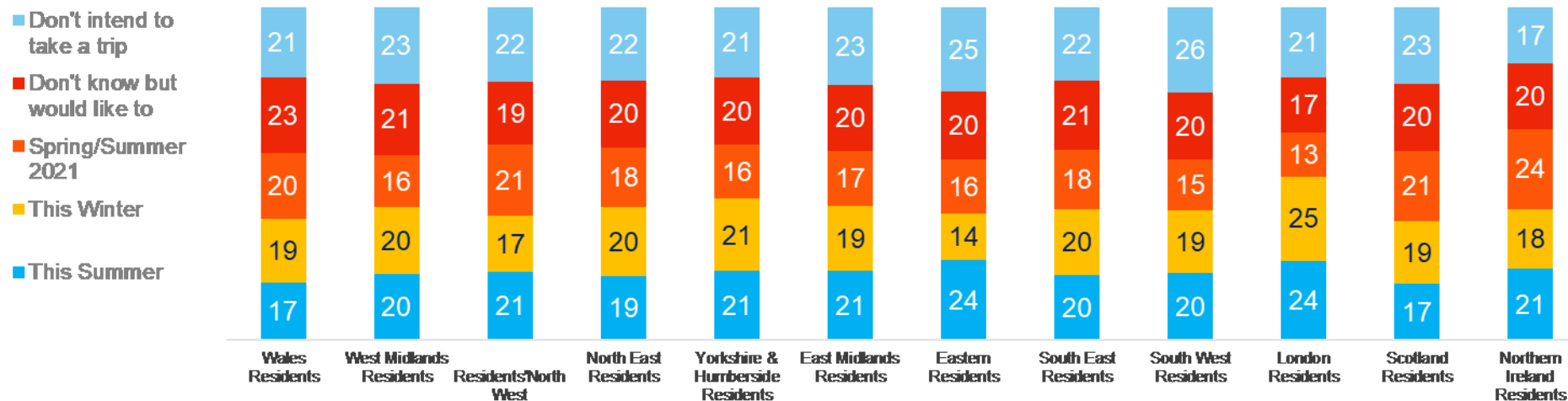
Appendix



When anticipating going on next UK short break or holiday – by region

- Although intention to take a UK holiday or short break this summer is broadly similar across regions, it's notable that Wales and Scotland residents have the lowest intention out of all regions

Figure 47. When planning on going on next UK short break or holiday, Percentage Weeks 1-4, UK



QVB2a. Thinking of the next UK 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 1-4 n=7,008

Destination choice for summer intenders by region of residence

- Although Wales is likely to generate visits from 29% of Wales residents, other parts of the UK generate more visits from their 'home region', in particular Scotland (61%), South West of England (51%), Northern Ireland (44%) and North West of England (33%)

Table 4. Destination intention of summer intenders by region of residence, Percentage, Weeks 1-4, UK

Destination	Region of Residence												
	Summer Intenders	Wales	South West	Scotland	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
South West	19%	29%	51%	1%	14%	16%	15%	32%	11%	3%	22%	16%	5%
Scotland	13%	5%	4%	61%	10%	12%	13%	5%	6%	18%	7%	6%	27%
Wales	11%	30%	11%	1%	18%	9%	5%	11%	5%	7%	24%	10%	0%
North West	11%	10%	6%	11%	33%	13%	11%	5%	5%	13%	10%	8%	0%
London	10%	11%	5%	7%	10%	23%	4%	5%	12%	17%	6%	6%	5%
Yorkshire & the Humber	9%	4%	6%	3%	11%	7%	29%	4%	4%	18%	9%	18%	0%
South East	9%	6%	9%	3%	2%	18%	4%	23%	11%	8%	3%	5%	0%
East of England	8%	1%	0%	2%	1%	12%	5%	9%	31%	3%	4%	9%	0%
North East	5%	4%	2%	4%	13%	4%	7%	3%	5%	13%	2%	9%	1%
East Midlands	5%	3%	6%	2%	2%	4%	5%	5%	3%	2%	11%	4%	5%
West Midlands	5%	2%	0%	2%	4%	7%	3%	6%	5%	2%	6%	16%	14%
Northern Ireland	3%	0%	1%	2%	1%	4%	1%	2%	2%	2%	2%	1%	44%

QVB4a. Where in the UK 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 UK between June-Sept. All n=1,453 East of England n=106, East Midlands n=96, North East n=51, North West n=128, South East n=167, South West n=100, West Midlands n=106, Yorkshire and The Humber n=110, London n=205, Scotland n=172, Wales n=138, Northern Ireland n=25* *Small base sizes

Destination choice for winter intenders by region of residence

- The pattern of destinations visited by region of residence in winter is similar to the summer months. 28% of Wales resident intenders are likely to visit Wales, with a number of destinations attracting more ‘home’ residents including Scotland, South West of England, Yorkshire and The Humber, East of England and Northern Ireland

Table 5. Destination intention of winter intenders by region of residence, Percentage, Weeks 1-4, UK

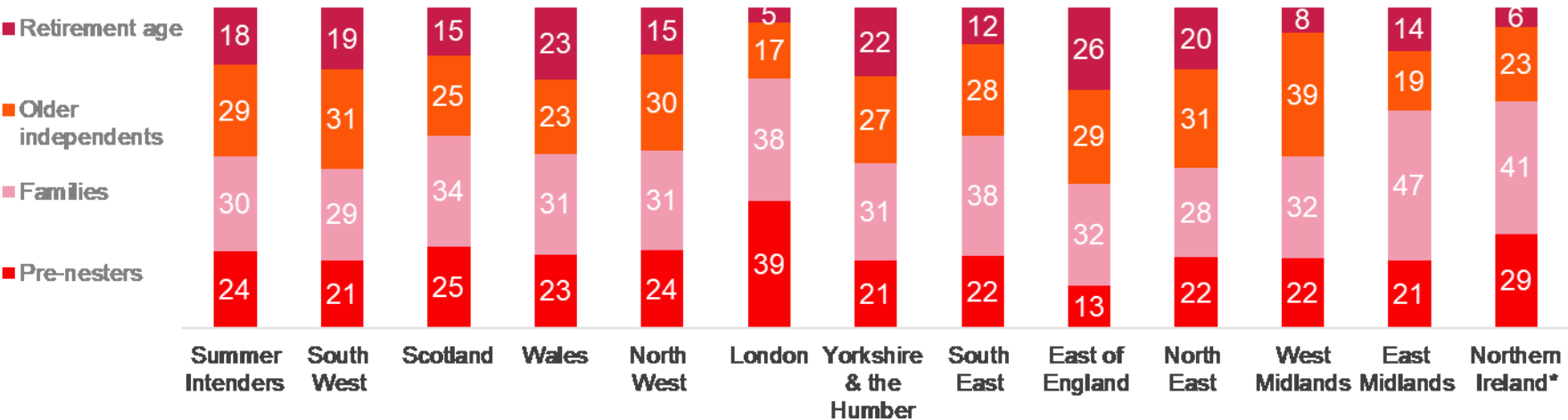
Destination	Region of Residence												
	Winter Intenders	Wales	South West	Scotland	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
South West	17%	22%	44%	2%	7%	10%	11%	27%	19%	5%	24%	14%	4%
Scotland	15%	10%	4%	55%	14%	17%	14%	12%	4%	9%	10%	5%	23%
Wales	9%	28%	16%	4%	9%	6%	8%	6%	12%	6%	9%	8%	0%
North West	13%	12%	6%	8%	38%	12%	10%	6%	3%	33%	18%	9%	18%
London	14%	15%	10%	12%	16%	28%	13%	7%	7%	8%	13%	14%	11%
Yorkshire & the Humber	9%	2%	4%	5%	9%	9%	33%	3%	6%	11%	4%	12%	1%
South East	9%	5%	8%	4%	3%	10%	3%	20%	9%	7%	6%	8%	4%
East of England	6%	3%	1%	1%	2%	7%	1%	6%	32%	3%	4%	8%	0%
North East	4%	1%	4%	4%	7%	2%	6%	3%	2%	14%	2%	5%	3%
East Midlands	6%	4%	7%	3%	7%	7%	4%	3%	5%	6%	18%	4%	0%
West Midlands	6%	3%	1%	3%	3%	8%	4%	4%	12%	3%	10%	13%	1%
Northern Ireland	4%	2%	2%	4%	5%	3%	3%	2%	1%	3%	1%	0%	38%

QVB4a. Where in the UK 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 UK between October to March. All n=1,353 East of England n=59, Eats Midlands n=85, North East n=56, North West n=107, South East n=175, South West n=98, West Midlands n=107, Yorkshire and The Humber n=112, London n=216, Scotland n=173, Northern Ireland n=21, Wales 144

Life stage breakdown of summer intenders - *by destination*

- With notable exception of London, there are minimal statistically significant differences in profile of intended summer visitors across UK destinations. However, Wales indexes highest on visitors of retirement age. Family representation for visitors to Wales is around average.

Figure 48. Life stage of summer intenders by destination, Percentage Weeks 1-4, UK

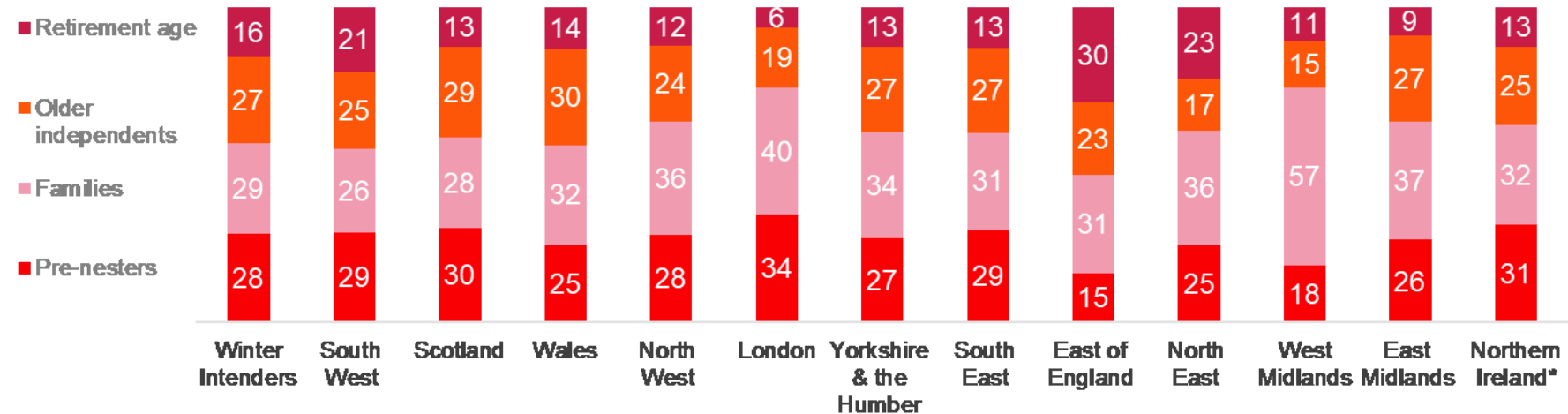


Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453; South West n=271; Scotland n=2223; Wales n=164; North West n=166; London n=154; Yorkshire and The Humber n=128; South East n=142; East of England n=99; North East n=80; West Midlands n=68; East Midlands n=74; Northern Ireland n=45* *Base sizes low – treat with caution.

Life stage breakdown of winter intenders - *by destination*

- As with summer destinations, there are minimal statistically significant differences in life stage representation by winter destination. However, London is significantly more likely than average to attract 'pre-nesters' and those in the 'family' life stage – although it's worth noting not all of those in the family life-stage will travel with their children.

Figure 49. Life stage of winter intenders by destination, Percentage Weeks 1-4, UK

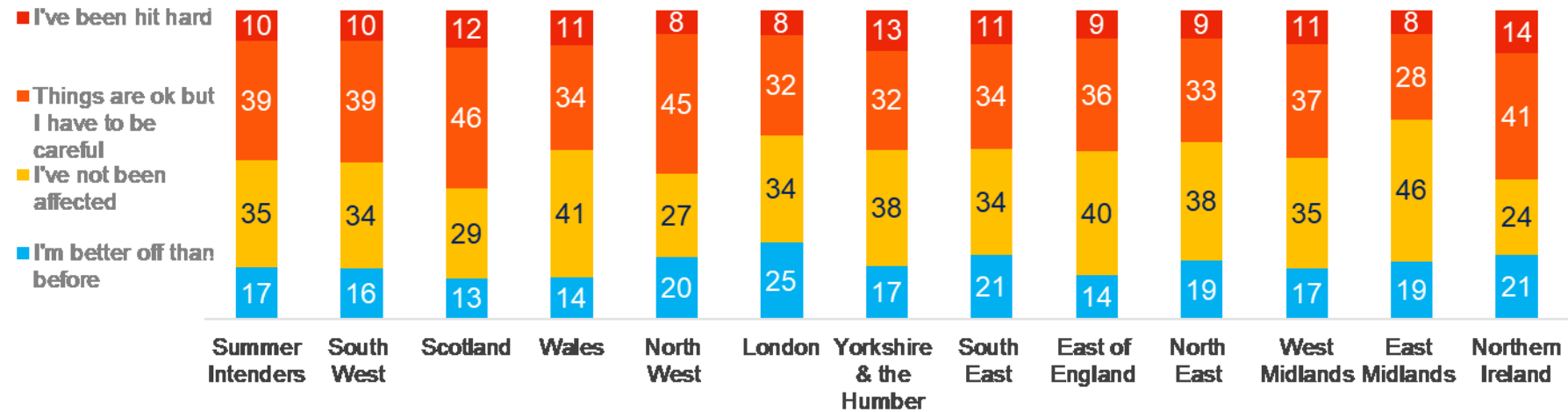


Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK between October-March All n=1,353; South West n=223; Scotland n=230; Wales n=137; North West n=170; London n=204; Yorkshire and The Humber n=110; South East n=116; East of England n=69; North East n=56; West Midlands n=80; East Midlands n=71; Northern Ireland n=44* *Base sizes low – treat with caution.

Financial segments of summer intenders - *by destination*

- There are minimal statistical differences in the financial segments by destination, although there is an indication that visitors to Wales are most likely to state a 'need to be careful', perhaps linked to lower average spend amongst this audience.
- As well as attracting more people stating 'I have to be careful', Wales is also likely to attract a higher than average proportion that are better off than before.

Figure 50. Financial segments of summer intenders by destination, Percentage Weeks 1-4, UK

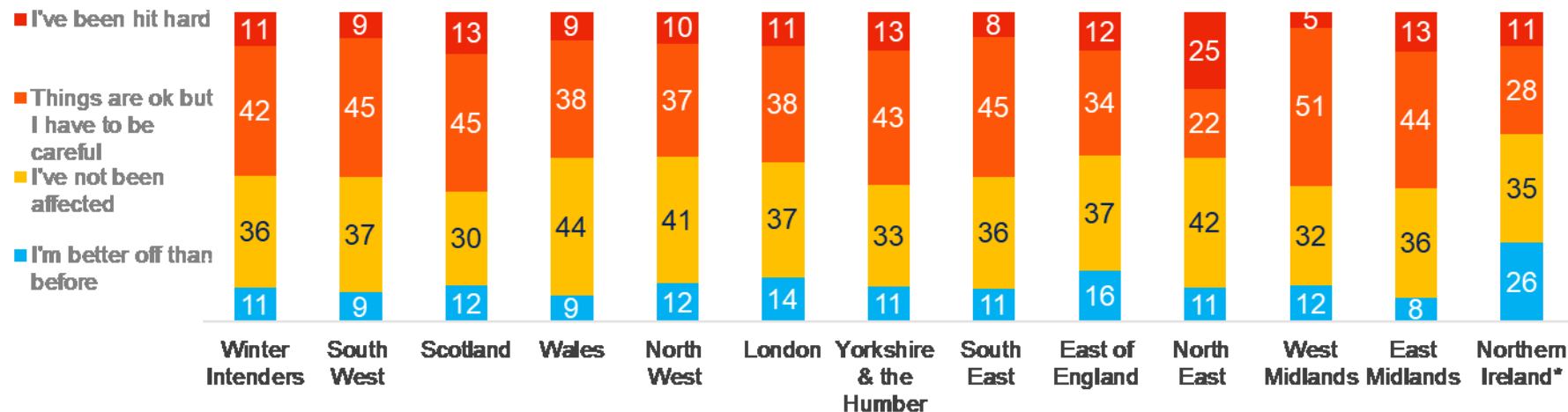


Financial segments questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453; South West n=271; Scotland n=2223; Wales n=164; North West n=166; London n=154; Yorkshire and The Humber n=128; South East n=142; East of England n=99; North East n=80; West Midlands n=68; East Midlands n=74; Northern Ireland n=45* *Base sizes low – treat with caution.

Financial segments of winter intenders - *by destination*

- Visitors to Wales in the winter are more likely than average to state they haven't been impacted financially by COVID-19 than average, and than visitors to Wales in the summer months

Figure 51. Financial segments of winter intenders by destination, Percentage Weeks 1-4, UK

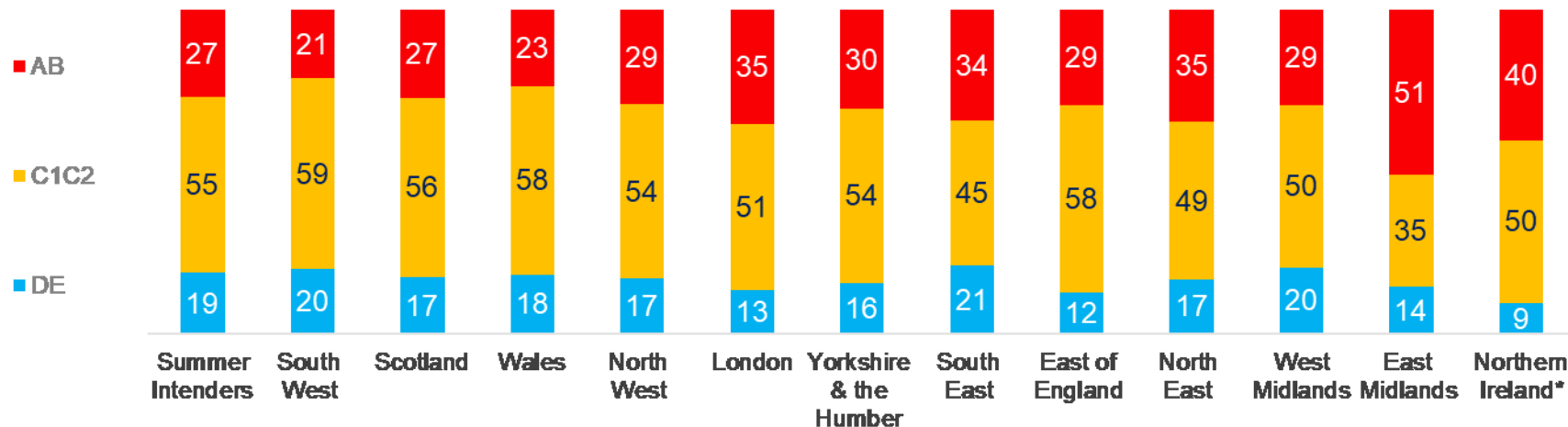


Financial segments questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
 Base: All respondents planning on taking a holiday or short break in the UK between October-March All n=1,353; South West n=223;
 Scotland n=230; Wales n=137; North West n=170; London n=204; Yorkshire and The Humber n=110; South East n=116; East of England
 n=69; North East n=56; West Midlands n=80; East Midlands n=71; Northern Ireland n=44* *Base sizes low – treat with caution.

Social grade of summer intenders - by destination

- The social grade split is relatively consistent across destinations, although Wales attracts the second lowest proportion of ABs, only the South West being lower

Figure 52. Social grade of summer intenders by destination, Percentage Weeks 1-4, UK



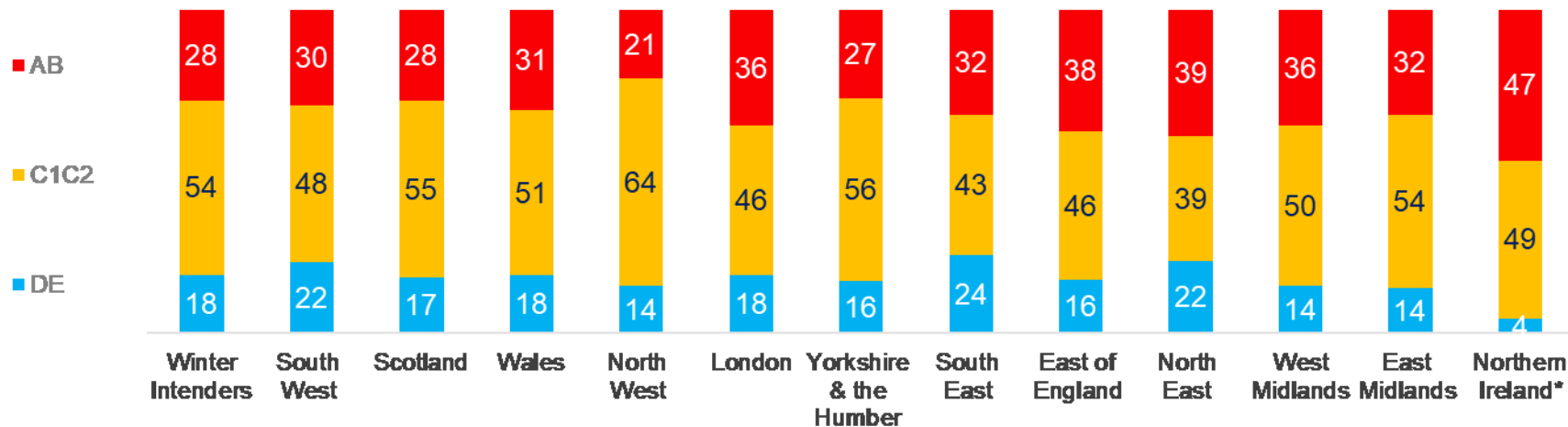
Financial segments questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453; South West n=271; Scotland n=2223; Wales n=164; North West n=166; London n=154; Yorkshire and The Humber n=128; South East n=142; East of England n=99; North East n=80; West Midlands n=68; East Midlands n=74; Northern Ireland n=45* *Base sizes low – treat with caution.

Social grade of winter intenders - by destination

- In the winter months, Wales attracts a higher than average proportion of social grade ABs, which ties in with the higher proportion of visitors not yet financially affected by the pandemic

Figure 53. Social grade of winter intenders by destination, Percentage Weeks 1-4, UK



Social grade question and QVB4a. Where in the UK 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 UK between October-March All n=1,353; South West n=223; Scotland n=230; Wales n=137; North West n=170; London n=204; Yorkshire and The Humber n=110; South East n=116; East of England n=69; North East n=56; West Midlands n=80; East Midlands n=71; Northern Ireland n=44* *Base sizes low – treat with caution.

Party composition of *summer* intenders - *by destination*

- ‘Travelling with a partner’ is the most commonly stated party composition, for all destinations followed by ‘child or young adults’. Wales indexes lower for attracting parties with children, compared to the average

Table 6. Visitor party of summer intenders by destination, Percentage, Weeks 1-4, UK

	Summer Intenders	South West	Scotland	Wales	North West	London	South East	Yorkshire /Humber	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Your partner	55%	59%	53%	55%	53%	42%	56%	49%	60%	56%	50%	47%	60%
Children or young adults (aged 16-24)	32%	31%	30%	28%	31%	32%	40%	27%	33%	31%	24%	37%	35%
Friend/s	18%	14%	15%	20%	16%	26%	21%	20%	17%	6%	21%	17%	13%
With parents of older adults	9%	9%	8%	7%	7%	9%	10%	8%	10%	12%	5% ⁰	11%	0%
Other family member	16%	23%	20%	13%	16%	12%	15%	20%	11%	8%	19%	15%	0%
Pets	9%	12%	5%	8%	4%	4%	11%	15%	8%	21%	0%	12%	2%
Will travel alone	6%	3%	7%	6%	5%	7%	5%	7%	6%	5%	8%	4%	11%
Other	4%	2%	2%	4%	5%	8%	3%	5%	4%	2%	4%	8%	0%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453 and exclusively in each region South West n=208; Scotland n=179; Wales n=110; North West n=117; London n=111; Yorkshire and The Humber n=78; South East n=97; East of England n=73; North East n=51*; West Midlands n=45*; East Midlands n=37*; Northern Ireland n=25* *Base sizes low – treat with caution.

Party composition of winter intenders - *by destination*

- The pattern of party composition is similar amongst winter intenders

Table 7. Visitor party of winter intenders by destination, Percentage, Weeks 1-4, UK

	Winter Intenders	South West	Scotland	Wales	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Your partner	59%	59%	55%	51%	55%	41%	63%	45%	52%	60%	32%	48%	46%
Children or young adults (aged 16-24)	29%	29%	27%	27%	32%	28%	26%	34%	31%	26%	29%	30%	19%
Friend/s	20%	19%	19%	15%	21%	24%	23%	24%	10%	28%	29%	22%	26%
With parents of older adults	8%	10%	8%	4%	9%	5%	6%	15%	5%	4%	10%	2%	6%
Other family member	18%	19%	15%	22%	15%	10%	17%	17%	22%	13%	20%	23%	22%
Pets	7%	6%	8%	9%	6%	3%	6%	6%	6%	9%	9%	9%	7%
Will travel alone	4%	4%	6%	12%	3%	9%	3%	5%	3%	8%	0%	6%	0%
Other	2%	2%	4%	1%	6%	7%	5%	4%	5%	0%	6%	6%	2%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK between October-March All n=1,353; South West n=223; Scotland n=230; Wales n=137; North West n=170; London n=204; Yorkshire and The Humber n=110; South East n=116; East of England n=69; North East n=56; West Midlands n=80; East Midlands n=71; Northern Ireland n=44*

*Base sizes low – treat with caution.

Accommodation preference of summer intenders – *by destination*

- Accommodation type varies widely according to destination type. For trips to Wales, ‘commercial rental’ indexes higher than average, and ‘hotel/motel/inn’ lower than average.

Table 8 Accommodation preference of summer intenders by destination, Percentage, Weeks 1-4, UK

	Summer Intenders	South West	Scotland	Wales	North West	London	South East	Yorkshire & the Humber	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Caravan/Camping	36%	27%	34%	32%	32%	35%	27%	34%	44%	42%	27%	38%	37%
A private home	34%	31%	29%	33%	31%	46%	32%	32%	34%	33%	27%	45%	22%
Hotel/ motel/ inn	34%	31%	35%	27%	30%	48%	22%	32%	25%	27%	57%	28%	36%
Commercial rental	32%	24%	30%	33%	31%	41%	33%	19%	29%	55%	15%	39%	28%
Guesthouse/ B&B / Farmhouse	21%	13%	12%	13%	24%	27%	27%	17%	15%	27%	19%	19%	21%
Other	10%	6%	9%	8%	4%	20%	8%	4%	14%	13%	11%	15%	0%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK 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 UK between June-Sept. All n=1,453 and exclusively in each region South West n=208; Scotland n=179; Wales n=110; North West n=117; London n=111; Yorkshire and The Humber n=78; South East n=97; East of England n=73; North East n=51*; West Midlands n=45*; East Midlands n=37*; Northern Ireland n=25* *Base sizes low – treat with caution.

Accommodation preference of winter intenders – *by destination*

- In the winter months, Wales visitors stay in a range of accommodation types, 'private home' and 'hotel/motel/inn' the most preferred, further underlining the different audiences that comes to Wales in the winter months compared to the summer months

Table 9 Accommodation preference of winter intenders by destination, Percentage, Weeks 1-4, UK

	Winter Intenders	South West	Scotland	Wales	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Caravan/Camping	28%	23%	16%	19%	23%	38%	24%	28%	28%	25%	37%	32%	27%
Private home	36%	28%	29%	39%	25%	47%	19%	42%	35%	46%	56%	42%	38%
Hotel/motel/inn	46%	36%	38%	35%	50%	54%	50%	60%	13%	38%	41%	47%	54%
Commercial self-catering	36%	36%	36%	31%	31%	42%	26%	26%	45%	35%	36%	43%	31%
Guesthouse/B&B	26%	24%	22%	28%	21%	23%	34%	16%	19%	28%	27%	23%	22%
Other	10%	8%	6%	8%	10%	18%	10%	5%	9%	10%	11%	17%	19%

Destination type of summer intenders - *by destination*

- Destination type generally reflects the area being visited. The South West, South East and East of England are most likely to generate 'traditional coastal/seaside town' trips, while for London it's 'city or large town' trips. Scotland, Wales and the North West of England are most likely to generate trips to mountains or hills.

Table 10. Destination type of summer intenders by destination, Percentage, Weeks 1-4, UK

	Summer Intenders	South West	Scotland	Wales	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Traditional coastal/seaside town	30%	45%	18%	26%	15%	8%	51%	28%	41%	27%	10%	19%	27%
Countryside or village	32%	33%	30%	33%	34%	10%	27%	49%	33%	15%	43%	37%	30%
City or large town	25%	12%	22%	15%	32%	75%	21%	19%	20%	16%	29%	24%	27%
Rural coastline	23%	32%	32%	23%	7%	8%	19%	14%	30%	27%	15%	10%	18%
Mountains or hills	14%	5%	26%	17%	17%	12%	6%	8%	7%	18%	0%	16%	31%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK 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 UK between June-Sept. All n=1,453 and exclusively in each region South West n=208; Scotland n=179; Wales n=110; North West n=117; London n=111; Yorkshire and The Humber n=78; South East n=97; East of England n=73; North East n=51*; West Midlands n=45*; East Midlands n=37*; Northern Ireland n=25* *Base sizes low – treat with caution.

Destination type of winter intenders - *by destination*

- In the winter months, Wales is the UK destination that attracts the highest incidence of 'rural coastline' trips, and the joint highest proportion of trips to 'mountains or hills'.

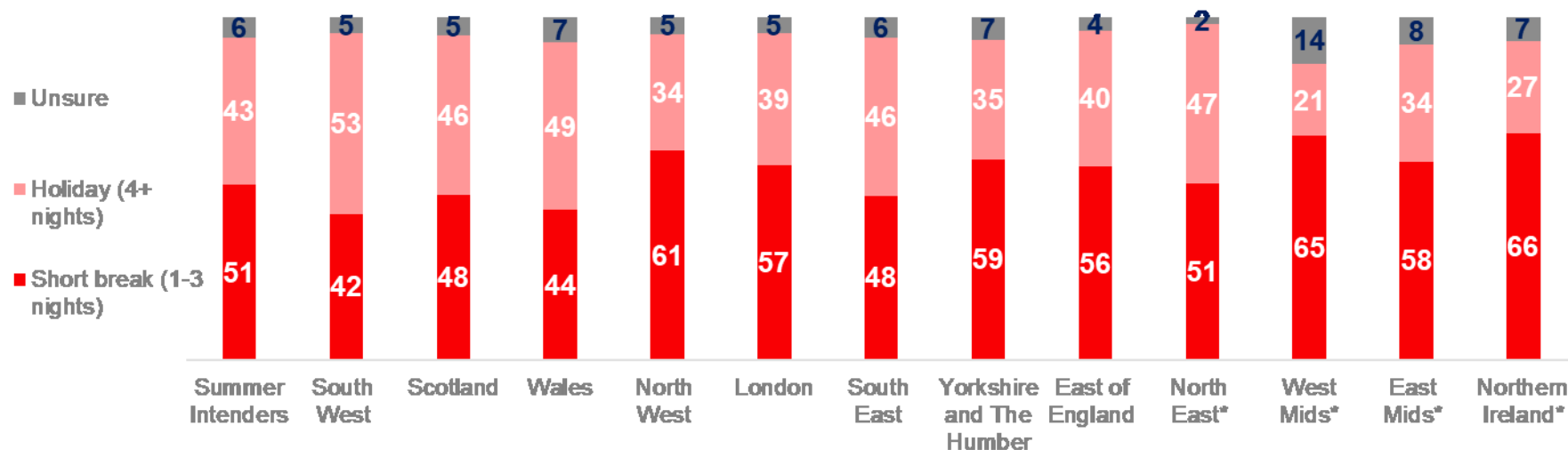
Table 11. Destination type of winter intenders by destination, Percentage, Weeks 1-4, UK

	Winter Intenders	South West	Scotland	Wales	North West	London	Yorkshire & the Humber	South East	East of England	North East*	West Mids*	East Mids*	Northern Ireland*
Traditional coastal/seaside town	27%	40%	20%	27%	26%	7%	20%	38%	46%	23%	17%	14%	30%
Countryside or village	32%	35%	31%	33%	29%	7%	40%	25%	43%	28%	24%	34%	22%
City or large town	32%	17%	29%	9%	30%	66%	34%	35%	8%	33%	50%	36%	28%
Rural coastline	20%	31%	20%	34%	10%	13%	17%	17%	21%	28%	4%	9%	15%
Mountains or hills	17%	5%	24%	24%	15%	13%	11%	8%	10%	15%	17%	18%	18%

Trip length of summer intenders – *by destination*

- Wales is second only to the South West of England in generating longer holidays of 4+ nights this summer

Figure 54. Length of next summer UK holiday or short break by destination type, Percentage Week 1-4, UK

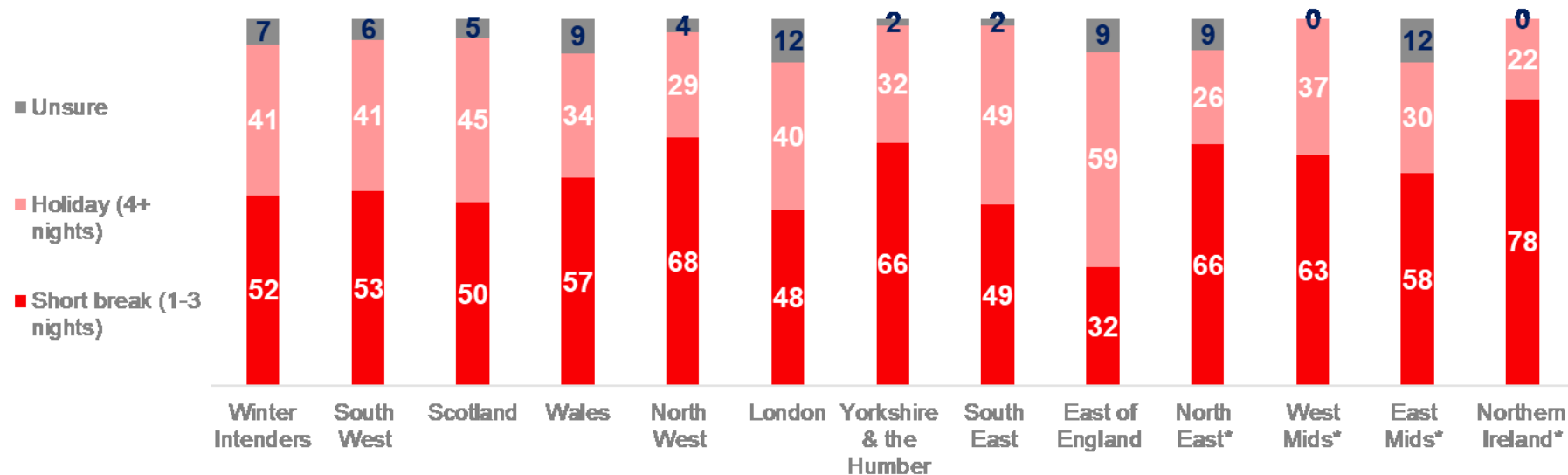


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453 and exclusively in each region South West n=208; Scotland n=179; Wales n=110; North West n=117; London n=111; Yorkshire and The Humber n=78; South East n=97; East of England n=73; North East n=51*; West Midlands n=45*; East Midlands n=37*; Northern Ireland n=25* *Base sizes low – treat with caution.

Trip length of winter intenders – *by destination*

- In the winter months, Wales is seen as more of a short break destination than average and than in the summer months.

Figure 55. Length of next winter UK holiday or short break by destination type, Percentage Week 1-4, UK

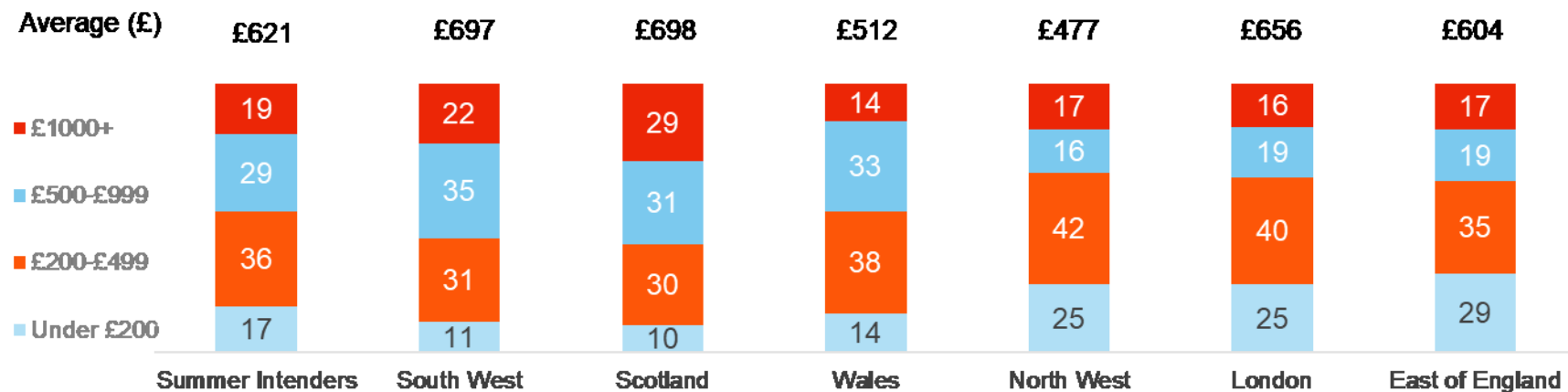


QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? And QVB5 Which of the following best describes the main types of destination you are likely to stay in during your UK trip? Base: All respondents planning on taking a holiday or short break in the UK between October-March All n=1,353; South West n=223; Scotland n=230; Wales n=137; North West n=170; London n=204; Yorkshire and The Humber n=110; South East n=116; East of England n=69; North East n=56; West Midlands n=80; East Midlands n=71; Northern Ireland n=44* *Base sizes low – treat with caution.

Anticipated spend for summer intenders – *by destination*

- Wales generates lower than average spend in the summer months. This is largely driven by a low proportion of 'high spenders' as opposed to a low proportion of 'low spenders'.

Figure 56. Anticipated trip spend for summer trips by destination type, Percentage, Average, Weeks 1-4, UK



QVB6e. Approximately how much do you think this trip will cost in total?

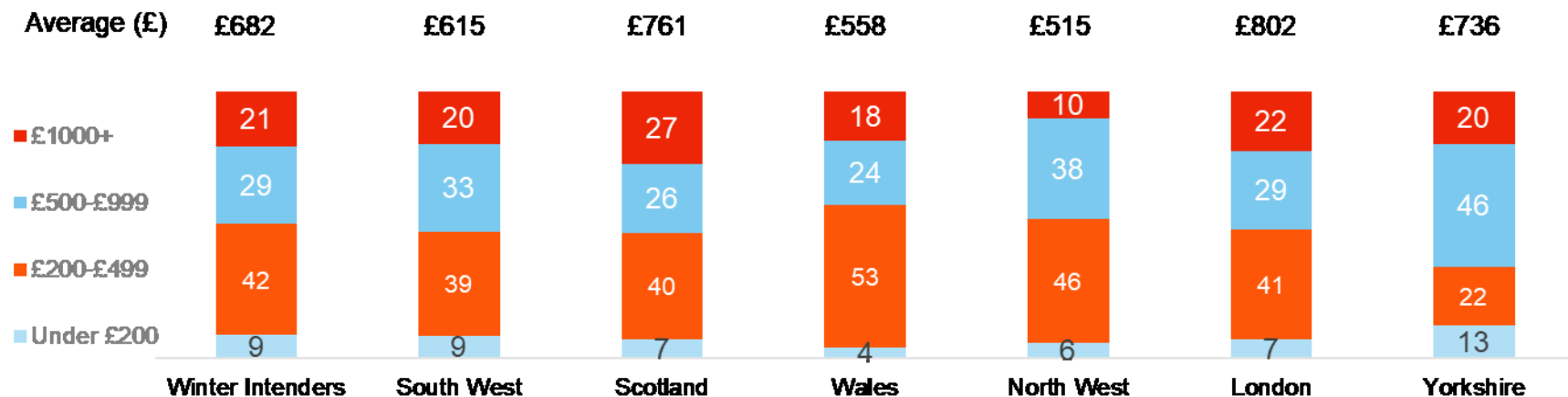
Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. All n=1,453; and exclusively in each region South West n=111; Scotland n=80; Wales n=43*; North West n=51* London n=42*; South East n=38*; East of England n=35*;

*Base sizes low – treat with caution. Regions with base sizes below 30 not shown. NOTE: QUESTION ONLY ADDED FROM WEEK 3, SO BASE SIZES ARE LOW.

Anticipated spend for winter intenders – *by destination*

- Wales also generates lower than average spend in the winter months, again driven by fewer 'high spenders' than more low spenders.

Figure 57. Anticipated trip spend for winter trips by destination type, Percentage, Average, Weeks 1-4, UK



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 UK between winter intenders Winter intenders n=660, South West n=113, Scotland n=111, Wales n=59, North West n=86, London n=106, Yorkshire n=48

Methodology



Methodology

The findings in this report are based on a weekly online survey conducted amongst a nationally representative sample of the UK population.

The sample is representative of UK 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 Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation. This report aggregates the results taken from Weeks 1-4 of the COVID-19 consumer weekly tracker.