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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2020 (Weeks 9-13)

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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 has been repeated across a 13 week period with the first week on the week commencing 18th May.

The findings in this report are based on data from weeks 9-13. This is based on fieldwork taking place during the following dates:

- **13-17 July; 20-24 July; 27-31 July; 3-7 August; 10-14 August**

Definitions used within this report (1)

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

In the first chapter we look at trips taken in the UK and Wales. There are four key definitions within this section:

- **All UK trips taken:** All members of the public that have taken an overnight trip in the UK since the start of July
- **All Wales trips taken:** All members of the public that have taken an overnight trip *exclusively* in Wales since the start of July for any purpose (holiday, visiting friends or relatives, business or other)
- **All Wales holidays taken:** All members of the public that have taken an overnight *holiday* (not primarily visiting friends or relatives, business or other) exclusively in Wales
- **Intended trips:** Members of the public that intended to take a trip exclusively in Wales before lockdown restrictions were lifted. This data is taken from weeks 5-8.

The following chapters are 'forward looking' and focus on trip intention in the upcoming months. Definitions used include:

- **Wales Autumn intenders:** Members of the public who state their next U.K. holiday or short break will be in Wales and taken between September and October 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 November 2020 to March 2021. Note: This is a slightly different definition to previous reports, which included October.
- **Weeks 9-13**: Throughout the report, comparisons are made to the reporting that reflected Weeks 5 to 8 of this research. The questionnaire and sample was identical to that used for this report (Weeks 9-13) and reflects fieldwork conducted between 15th June and 10th July. 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.

Definitions used within this report (2)

Throughout the report we use a number of definitions. 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+.

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. autumn 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. autumn break, and the segment most likely to cite ‘personal finances’ as a barrier.
- **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. ‘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)

Trips taken in Wales during Summer 2020

1. As of Mid August, 1 in 6 (16%) U.K. residents had taken an overnight domestic holiday or short break, marginally higher than the 15% trips that were intended to be taken in July/August before restrictions were lifted. With two weeks of August still to go as fieldwork ended, it's likely that the proportion of trips taken will further exceed trips intended.
2. The uplift in trips taken compared to intended appears to have been driven by 'VFR' (visits to friends and relatives), with over a third of trips falling into this category, compared to less than 1 in 4 of intended trips. VFR trips are likely to be more flexible than holidays, and require less advanced planning, explaining why they may have been less clear cut for trip intentions.
3. Families appear to have driven trips taken to Wales, nearly half of all July/August Wales trip-takers falling into this life stage, significantly higher than the 1 in 3 of trip intenders. Wales trip takers are more likely than trip intenders to have been impacted by COVID-19 financially, implying those seeking good value were more likely to leave their trip decision to the last-minute.
4. There is also some evidence that Wales trip-takers included more risk-averse people than trip intenders (and trip-takers to the rest of the UK), suggesting that Wales is regarded as a 'low-risk' destination. Although residents from England and Scotland make up more Wales trip-takers than Wales residents, almost half as many non-Wales trip-takers visited than intended.
5. Looking purely at holiday destinations, the fall-out of trips taken is largely consistent with trip intentions – the South West of England was the most popular destination, and Wales was visited by 10% (identical to trip intentions). Notably, Wales is the U.K. region most likely to have attracted holiday visitors (as opposed to VFR, business or other visitor types).
6. 'Countryside or village' was the most popular holiday destination type in Wales and largely consistent with trip intentions. However, trips to 'traditional coastal/seaside towns' and 'mountains or hills' were significantly lower than intended. This may be driven by concerns around catching COVID-19, but equally may be a reflection of limited availability of accommodation, particularly for family groups who have more bespoke accommodation needs.
7. 'Caravan/camping' and 'private home' were the two main accommodation choices, both in line with trip intentions. Notably, 'commercial self-catering', 'hotel', and 'guesthouse/B&B' indexed significantly lower than normal. Again, this may partly be driven by availability, particularly for the 'larger than expected' family audience, but may also reflect slightly later reopening and concerns around less self contained forms of serviced accommodation.

Key findings (2)

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

1. At the time of the survey between Mid July to Mid August, there remains caution around conducting leisure activity amongst U.K. and Wales residents. However, comfort levels have increased since Mid June to Mid July, particularly for activities such as 'eating at a restaurant', perhaps driven by the Eat Out to Help Out scheme. For the first time since our research began both U.K. and Wales residents are 'net more likely' to eat in indoor restaurants as well as restaurants with outdoor seating. Comfort with 'travelling by public transport' has also increased, but remains the activity with the lowest comfort levels.
2. Despite increased comfort levels with everyday activities, confidence in the ability to take a U.K. short break or holiday from September onwards has either plateaued or declined. This may be linked to fears of a second wave fuelled by local lockdowns, the majority of the population anticipating one in the coming months.
3. Families are joint most confident with pre-nesters in the ability to take a U.K. holiday or short break in September. Pre-nesters are the most confident life stage to be able to take a UK trip from October to March 2021. Retirees remain the least confident life stage across all time periods.
4. Amongst U.K. and Wales residents, the main barrier to confidence in taking domestic trips from September onwards remains 'catching COVID-19', which is significantly more influential than the next most important barrier (fewer things to do/places to visit), and particularly amongst retirees. Pre-nesters are most likely to cite financial concerns, suggesting that despite confidence they may not have the means to take trips.
5. Reflecting the stasis in holiday confidence, the proportion of the U.K. public that plan to take fewer UK holidays and breaks this year remains well below those expecting to take more trips.
6. Wales residents are less confident and more cautious than U.K. residents, although the gap is smaller than previously, particularly for activities that have restrictions lifted for a longer period of time (e.g. shopping in your local shopping centre).
7. 20% of U.K. adults (c.9.4 million) plan on taking a U.K. short break or holiday from September to October. 19% of Wales residents (c.434k) intend to do so, reflecting the similar levels of confidence. This compares to an estimated 16% of U.K. residents (c.7.5 million) and 14% of Wales residents (c.323k) who have taken a holiday or break since the beginning of July.

Key findings (3)

Wales Visitor and Trip Profiles for Autumn/Winter

1. Amongst U.K. residents planning a domestic holiday this autumn (between September and October), Wales is the number four destination – the South West, Scotland and the North West the top three. Amongst *Wales residents* planning a trip this autumn, Wales is the number one destination followed by the South West of England.
2. Similar to summer intentions, residents of Wales, West Midlands and North West of England are most likely to be intending take a short break or holiday in Wales this autumn. There is also interest from around 1 in 10 of the highly populated London region, although Londoners will need some persuasion to visit – they are most likely to be considering other destinations, and few converted to trips in July and August.
3. Around a third of people considering a trip to Wales this autumn are also considering taking a trip somewhere else in the U.K. - the South West, Yorkshire and Scotland are the three leading alternatives.
5. The profile of visitors in autumn months is set to shift from 'families' and 'pre-nesters' to 'older independents' and 'retirees', particularly in September when there are no school holidays. In October and in the winter months, families again become the largest life stage, although this is likely to be concentrated during school holidays.
6. Wales intenders across all times periods 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. However, both the autumn and winter months are more likely than the summer months to attract COVID Cautious visitors. Wales has higher representation from the COVID Cautious segment, again suggesting it is regarded as a 'low-risk' destination.
7. Snowdonia remains the most popular destination for an autumn trip to Wales, followed by Mid Wales and the Brecon Beacons. Amongst Wales residents, Pembrokeshire is the most popular destination – consistent with intentions in the summer. In the winter months, Snowdonia remains the number one preferred destination amongst U.K. residents, although it is followed closely by Cardiff, which is the number one destination for Wales residents.
8. Wales intenders are planning to come to Wales for a range of holiday types, although 'countryside or village' is the number one across both autumn and winter. 'Traditional seaside town' retains its appeal in autumn, but is less preferred in the winter.
9. Around 1 in 4 visitors to Wales in the autumn are likely to travel with a child or a young adult, although this is significantly lower in September than in October, probably reflecting the planned return to school in September.

Key findings (4)

Accommodation, Booking and Travel

1. ‘Commercial self-catering’ is the number one accommodation type amongst Wales autumn and winter intenders, significantly more preferred than the summer months. ‘Caravan/camping’ retains some of its appeal across both time periods, although the dominance of ‘static caravan’ in the autumn gives way to ‘campervan/motorhome’ in the winter.
2. There are higher intentions for visitors to stay in serviced accommodation during their trips to Wales in the autumn and winter compared to the lower than normal use of serviced accommodation on trips taken during the summer period.
3. Visitors to Wales in both the autumn and winter are most likely to book their accommodation directly with a provider, but this is significantly more the case for the autumn months, driven by the higher incidence of retirees who prefer this channel. Online travel agent and a homestay website are the next preferred channels.
4. Overnight stays in the autumn and winter months are more likely to be a short break than a holiday of 4+ nights, although the difference between the two is marginal. Wales remains one of the U.K. destinations most likely to generate trips of 4+ nights.

Key findings (5)

Visitor Spending

1. The anticipated spend for Wales trips this autumn is £476 per party, significantly lower than the U.K. average (£615). The drop in spend reflects fewer families, fewer holidays of 4+ nights and a more value-driven audience. The autumn visitor is likely to be more cost-conscious, 1 in 4 on a reduced income (compared to 1 in 5 of summer intenders), more than average describing themselves as ‘ok’ financially and far fewer stating they are ‘better off than before the pandemic’.
2. Trip spend is estimated to be higher in Wales in the winter period (at £598) reflecting the higher representation of families and use of serviced accommodation. The winter average spend is also lower than the U.K. on the whole (£697), further underlining Wales’ position as a good value (lower spend) destination.

Trips taken in July and August

Trips taken and purpose of trips in July/Early August

- As of Mid-August, 16% of U.K. adults (c.8.7 million) had taken an overnight short break or holiday in the U.K since restrictions were lifted in early July – 14% of Wales residents. Both numbers are higher than intended trips before restrictions were lifted, and this gap is likely to widen as the research incorporates responses up to the end of August.
- The higher incidence of trips taken, appears to be driven by 'VFR' (visits to friends and relatives) as opposed to holiday trips. Over a third (35%) of U.K. trips taken were VFR, compared to 1 in 4 (23%) intended trips. This may be due to VFR trips being more spontaneous.

Figure 1. Taken an overnight holiday or short break in the U.K. since July, Percentage Weeks 12-13, U.K.

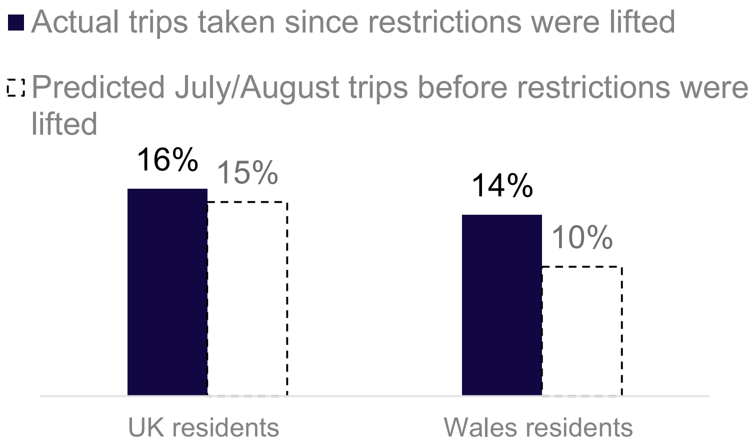
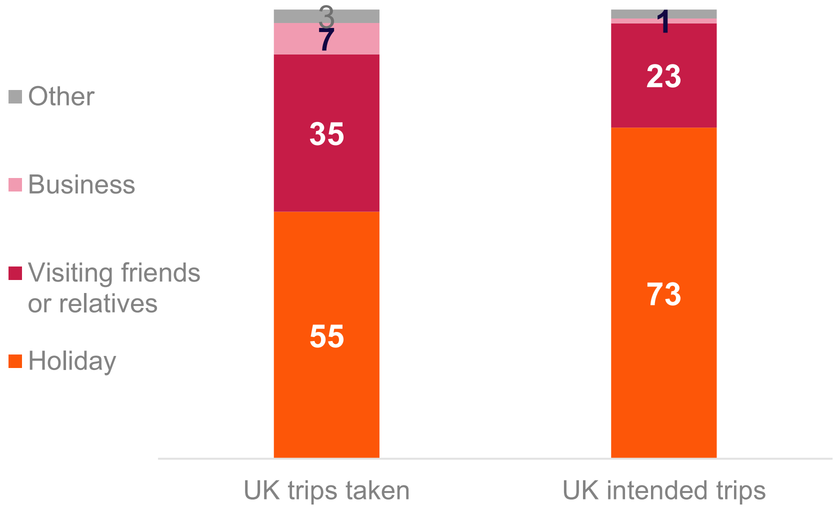


Figure 2. Purpose of intended and taken holiday or short break in UK, Percentage, Weeks 12-13, U.K.

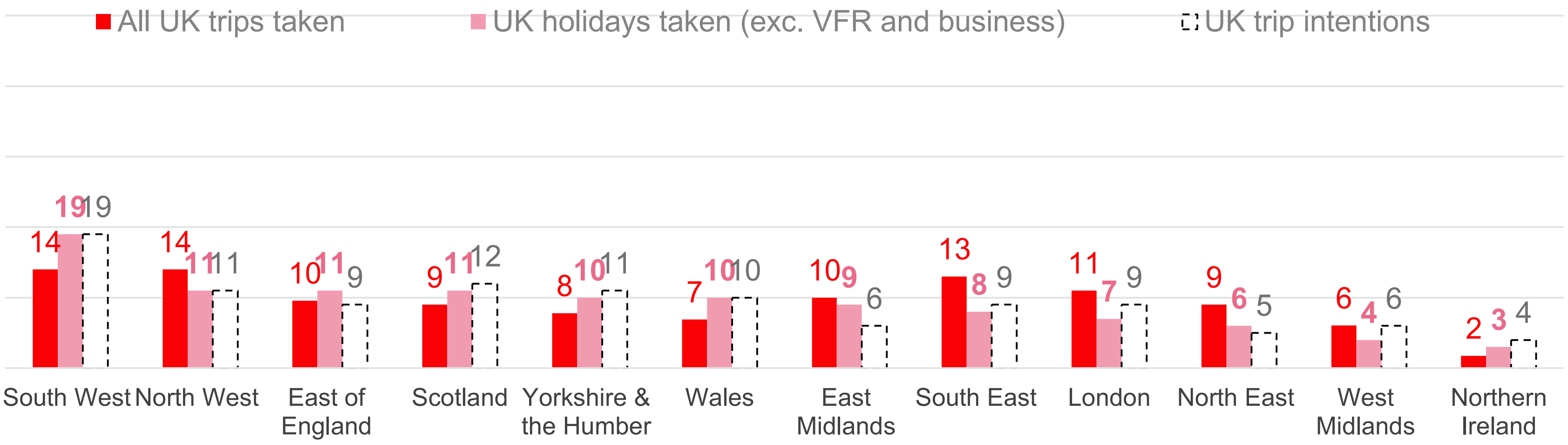


QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the trip you took in July/August?
Base: All week 12-13 respondents. U.K. residents n=3,514. Wales residents n=406.

Where stayed on trips in July/Early August

- In line with intentions, the South West England is the region of the U.K. that has generated the highest proportion of *holiday* trips since July, followed by the North West of England, the East of England and Scotland.
- 10% of U.K. residents that took a domestic *holiday* went to Wales, in line with 'all trip' intentions. 7% of all U.K. trip-takers visited Wales, lower than the holiday figure due to fewer VFR trips. Notably, although areas such as the South East of England and London score relatively high for 'all trips', they drop significantly when only looking at holidays

Figure 3. Where planning on staying on next U.K. overnight trip for autumn intenders , Percentage Weeks 12-13, U.K. and Wales Residents, Ranked on holidays

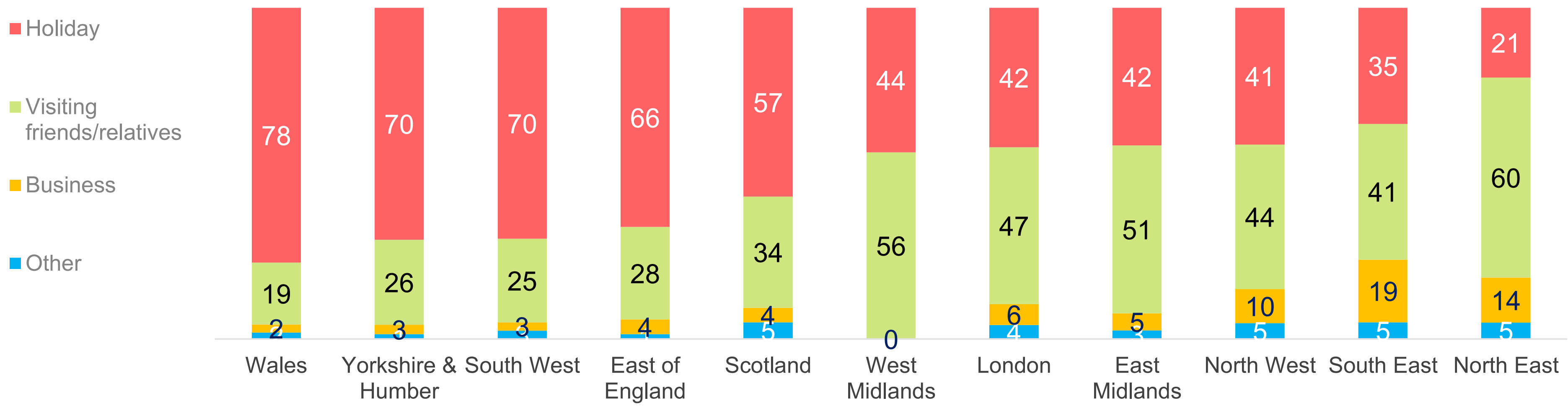


VB13c. Where in the U.K. did you stay on this trip in July/August?
Base: All respondents that took an overnight trip in the U.K. All UK trips n=592; All U.K. holidays or short breaks n=326

Purpose of trips in July/Early August by destination

- Wales is the destination of the U.K. *most* likely to have attracted *holiday* visitors since July, 78% of overnight visitors falling into this category. Wales is joined by Yorkshire and The Humber, The South West of England, the East of England and Scotland as generating a majority holiday visitors.

Figure 4. Purpose of July/August U.K. short break or holiday by destination, Percentage Weeks 10-13, U.K.



Vb13e. And which of the following best describes the purpose of the trip you took in July/August? Base: All that took a trip to exclusively to each destination Wales n=82, East of England n=68; East Mids n=77; North East n=81; North West n=126; South East n=100; South West n=119; West Mids n=39*; Yorkshire and The Humber n=70;London n=95; Scotland n=113

Demographics of trip-takers

- Families make up nearly half of holiday trip-takers to Wales since July, significantly higher than visitor intentions before restrictions were lifted. The rise in families is at the expense of retirees and older independents who index lower than trip intenders.
- Holiday visitors to Wales include all socio economic groups, but lower social grades have higher representation compared to trip intentions, whilst high AB social grades are consistent with visit intentions.

Figure 5. Breakdown of population and trip-takers by life stage, Percentage Weeks 10-13, U.K. and Wales

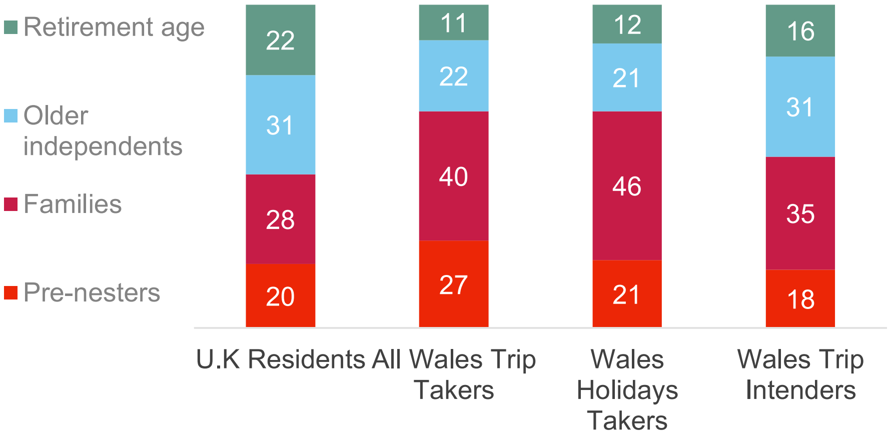
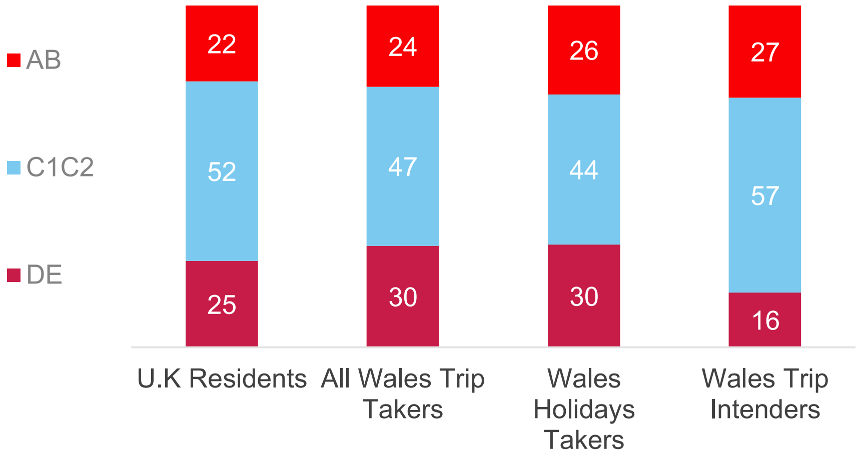


Figure 6. Breakdown of population and trip-takers by social grade, Percentage Weeks 10-13, U.K. and Wales



Source: Demographics. Base: All respondents. U.K. population n=8947 All Wales trips n=80; Wales holidays n=62

Financial impact of COVID-19 on trip-takers

- The highest proportion of Wales trip takers (46%) are in the category that state things are OK but they have to be careful with finances. A further four in ten state they have not been affected or are better off.
- Compared to 'Wales trip intenders' and trip-takers to elsewhere in the U.K., trip-takers to Wales are more likely to have been 'hit hard' by COVID-19, describe themselves as 'ok but they have to be careful', or are on a reduced income. The implication is that there has been a significant proportion of last-minute bookers looking for good value trips in Wales.

Figure 7. Breakdown of trip-takers compared to intenders by financial segments, Percentage Weeks 10-13, U.K. and Wales

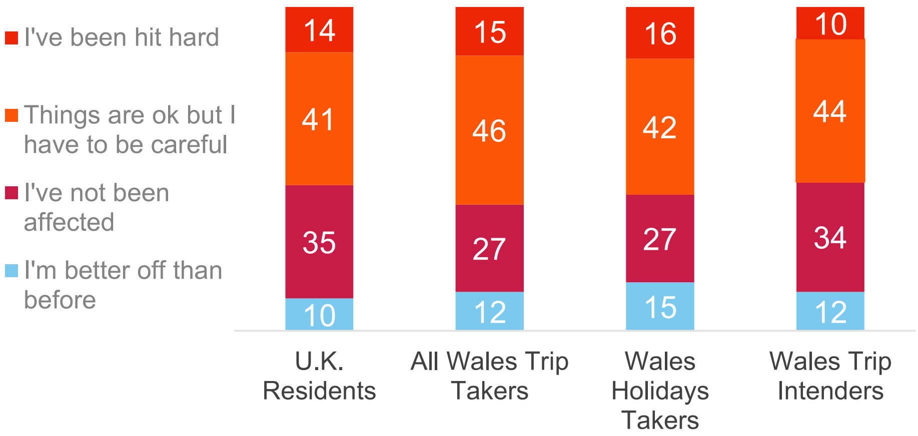
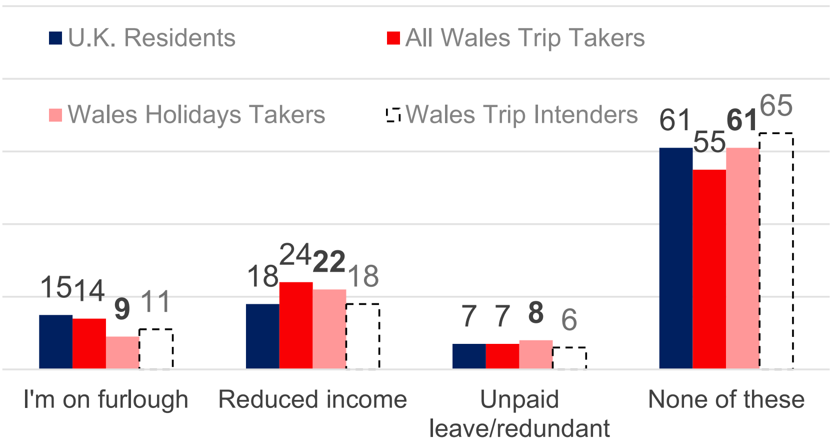


Figure 8. Employment impact on trip-takers compared to intenders, Percentage Weeks 10-13, U.K. and Wales

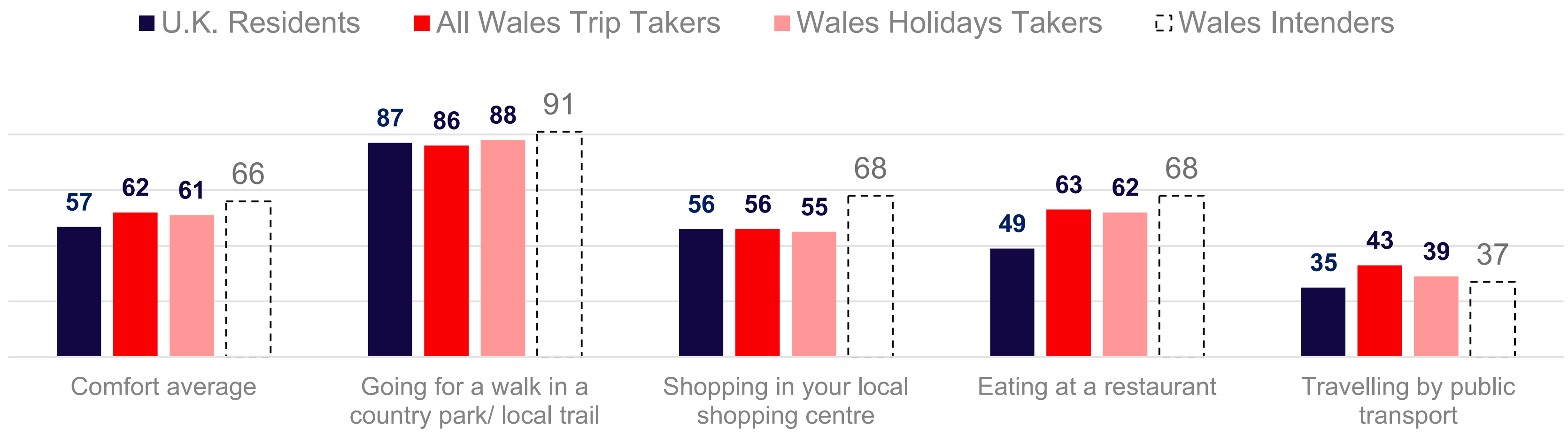


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=8947; All Wales trips n=80; Wales holidays n=62

Level of comfort undertaking activities amongst trip-takers

- Wales trip intenders and trip takers are consistent in displaying significantly higher comfort levels with everyday activities than the wider U.K. population. This clearly highlights that ‘attitude to risk’ remains a driver for taking domestic holidays.
- However, Wales trip-takers display lower comfort levels than U.K. trip takers on the whole, suggesting that Wales is seen as a ‘low-risk’ destination.

Figure 9. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Percent, Weeks 10-13, U.K. and Wales

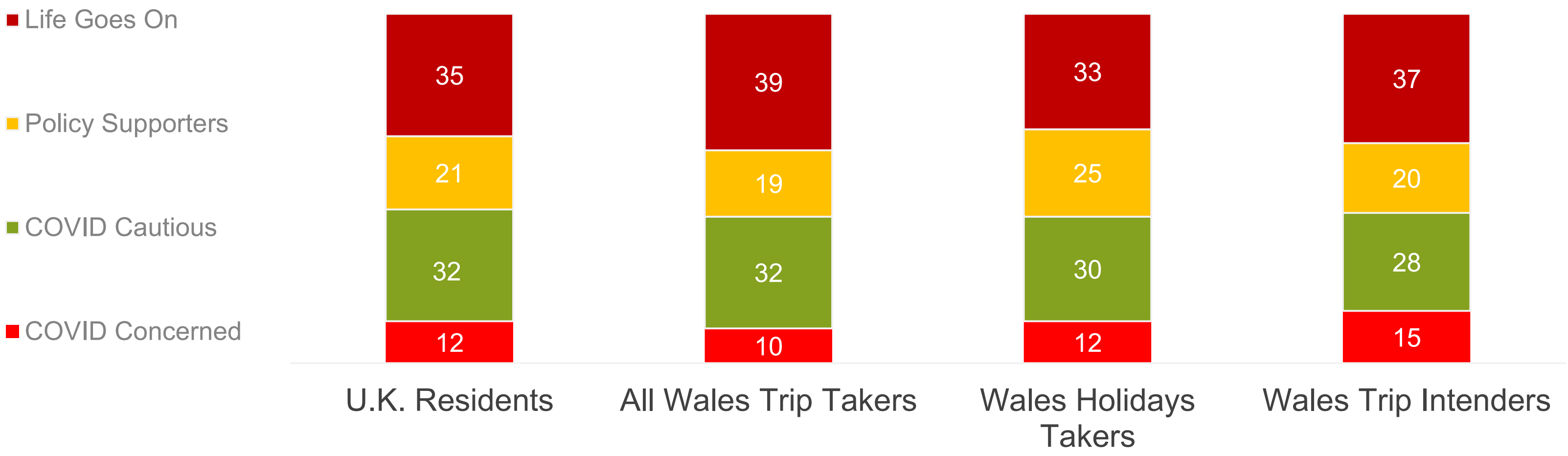


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
All Wales trips n=80; Wales holidays n=62

Attitudinal segments (see definitions page for more information)

- Wales trip takers are most likely to fall into the **Life Goes On** attitude segment, whilst holiday takers are more likely to fall into the **Policy Supporter** segment, both of these are generally more confident resuming everyday activities with the easing of restrictions. That said, the proportion of **Life Goes On** trip takers to Wales is lower than the U.K. average, further underlining the suggestion that Wales is seen as a 'lower risk' destination

Figure 10. Breakdown by segment, Percentage Weeks 12-13, U.K.

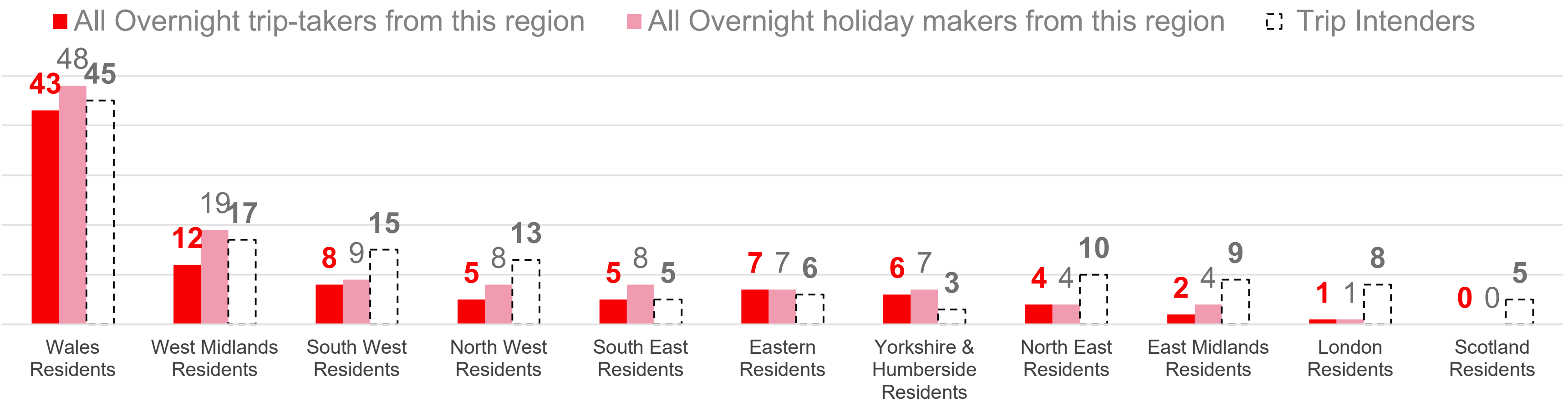


Base: All Wales trips n=80; Wales holidays n=62

Proportion of overnight stays in Wales by region of residence

- Almost half of all Wales-based holiday-makers took their holiday in Wales, marginally higher than the proportion that intended doing so. Holiday-makers from the West Midlands were the second most likely to visit Wales for an overnight stay, at 1 in 5, also higher than the proportion intending doing so. .
- Holiday-makers from the South West of England and the North West of England were the next most likely to have taken a holiday in Wales, with just under 10% of holiday takers in these regions visiting Wales.
- A similar proportion of holiday-makers from South East England and Yorkshire took a holiday in Wales but despite 8% of London intenders planning to visit Wales, only 1% ended up doing so.

Figure 11. Proportion of overnight trip-takers that took a trip to Wales by region, Percentage Weeks 10-13, U.K. and Wales, ranked on holiday

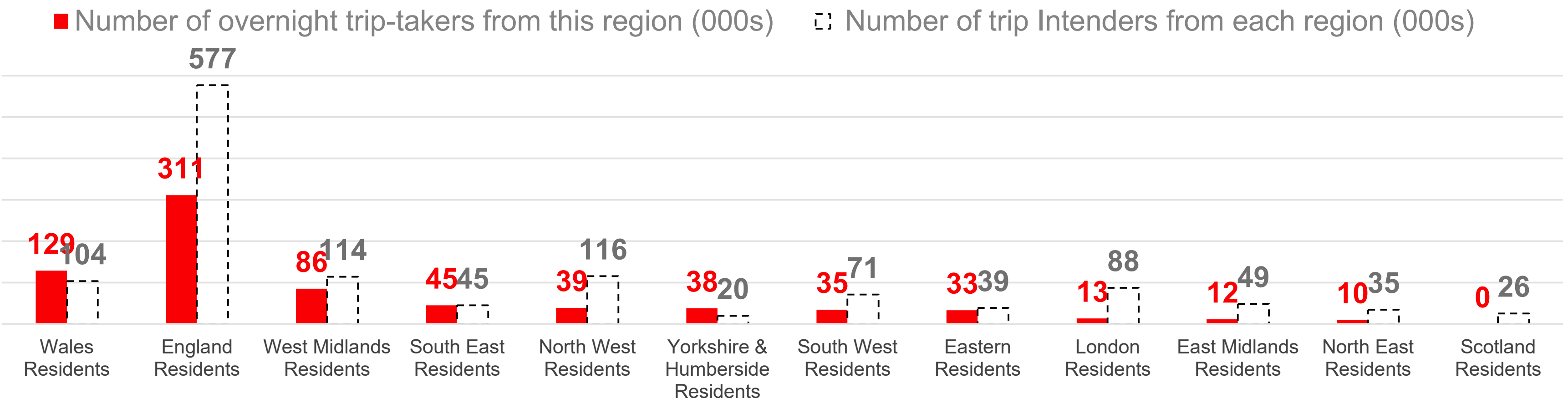


VB13c. Where in the U.K. did you stay on this trip in July/August?
Base: All residents planning on taking a holiday or short break in the U.K. in the autumn/winter. Residents in each region Wales n=132, East of England n=45; East Mids n=81; North East n=42; North West n=99; South East n=124; South West n=66; West Mids n=92; Yorkshire and The Humber n=90;London n=186; Scotland n=161

Proportion of overnight stays in Wales by region of residence

- When converted to numbers within the population, Wales is the region that has generated the highest number of trips in Wales since July. It also has the highest uplift in trips compared to intentions. The majority of England regions generated significantly fewer visits than intentions, almost twice as many stating they would visit than did actually visit.

Figure 11b. Number of overnight trip-takers as absolute numbers by region, Number (000s), Weeks 10-13, U.K. and Wales, ranked on all trips taken



VB13c. Where in the U.K. did you stay on this trip in July/August?
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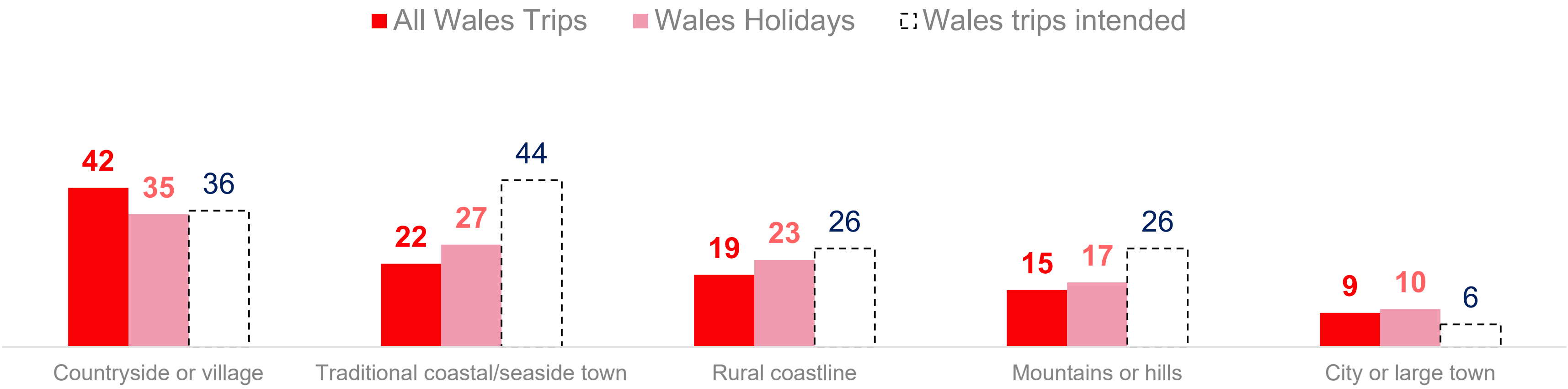
Types of location of trips taken in July/Early August

- 'Countryside or village' was the most popular destination type for Wales holiday-makers, with around a third staying in these areas, consistent with trip intentions.
- More than 1 in 4 (27%) stayed in a traditional coastal/seaside town, significantly lower than the 44% that intended doing so. A similar proportion (23%) stayed in the rural coastline, consistent with trip intentions.
- Mountains or hills were a destination for 17% (lower than intended) and City or large towns in Wales were the destination for just 10% of trips, much lower than normal, and significantly lower than U.K. trips on the whole.
- It's worth noting that the net 'intended' proportion of trip types is 'naturally' higher than type taken – intenders are likely to keep their options open before booking a trip. Actual bookings may be impacted by a range of factors including availability of accommodation.

Figure 12. Main type of destination for Wales July/ early August overnight trip, Percentage Weeks 10-13, U.K.

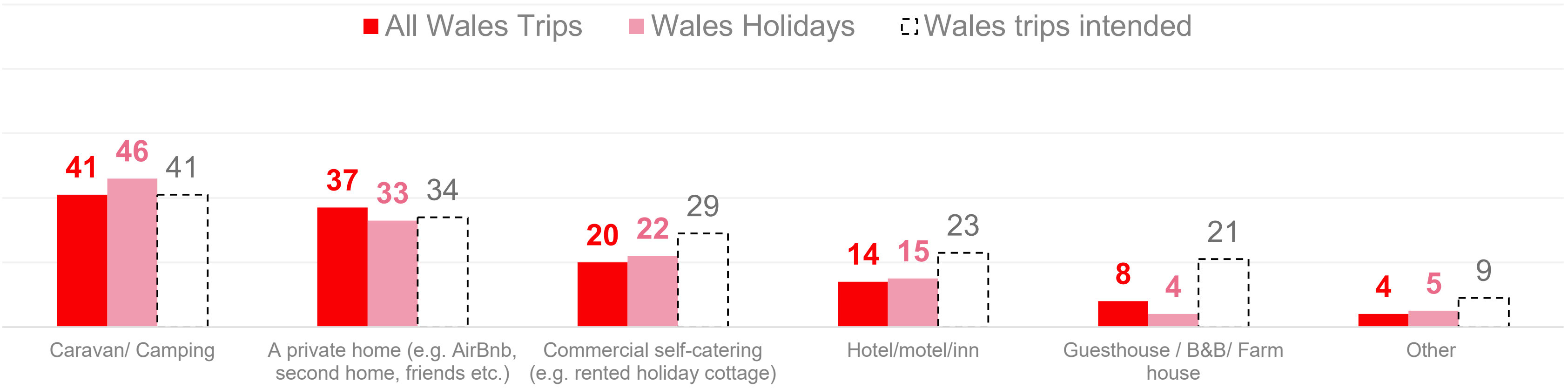


VB13d. Which of the following best describes the main type of destination you stayed in during your trip in July/August?
Base: All respondents that took a trip exclusively to Wales in July/Early August All Wales trips n=80; Wales holidays n=62

Types of accommodation used on trips taken in July/Early August

- Consistent with trip intentions, caravan/camping has been the number one choice of accommodation for Wales holiday stays in July and August, driven predominantly by 'static caravan' (24%) and motorhome (11%). 'Private home' is the second most popular accommodation choice of trips taken, also consistent with trip intentions, and driven predominantly by 'home stay accommodation' such as Airbnb (17%).
- Around one in five holiday takers stayed in 'commercial self-catering', a lower proportion than those intending to do so and may have been impacted by availability. A much lower than normal proportion of visitors stayed in 'hotel/motel/inn' and 'guesthouse/B&B farm house' accommodation.
- Stays in self-catering, hotel/motel/inn and guesthouse/B&B/farmhouse are each lower than amongst trips to the U.K. on the whole

Figure 13. Accommodation stayed in on Wales July/August trip in Wales, Net percentage, Weeks 10-13, U.K.

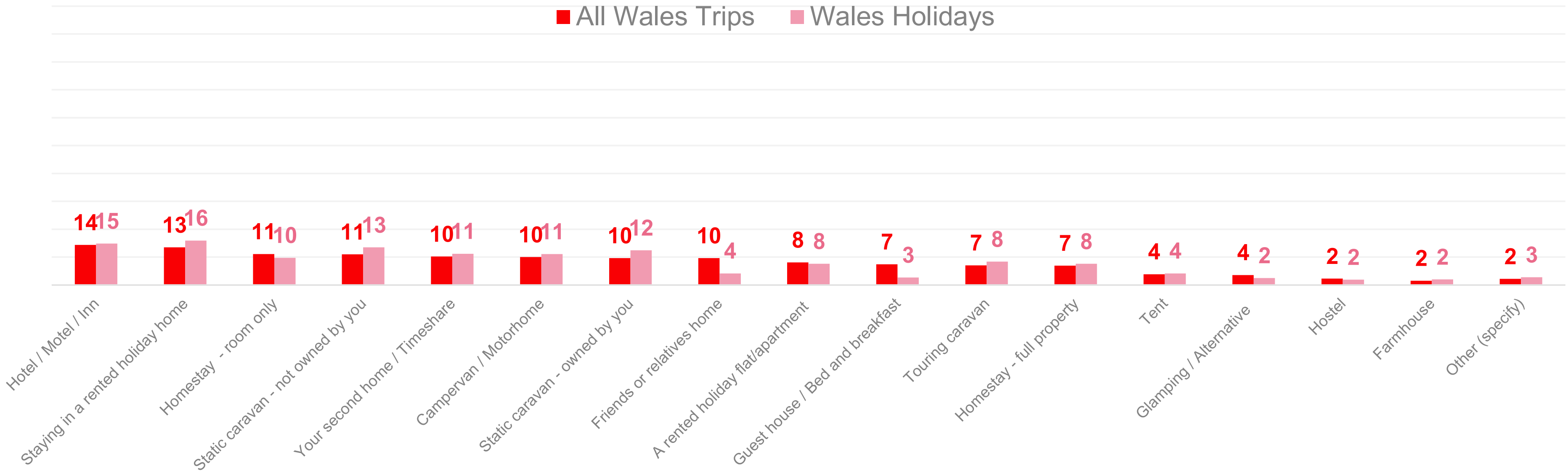


VB13f. In what type/s of accommodation did you stay in during your U.K. trip in July/August?
Base: All respondents that took a trip exclusively to Wales in July/Early August All Wales trips n=80; Wales holidays n=62

Types of accommodation used on trips taken in July/Early August

- ‘Hotel/motel/inn and rented holiday home are the two leading single types of accommodation stayed in on a Wales trip this July and August

Figure 13b. Full list of accommodation stayed in on Wales July/August trip in Wales, Net percentage, Weeks 10-13, U.K.

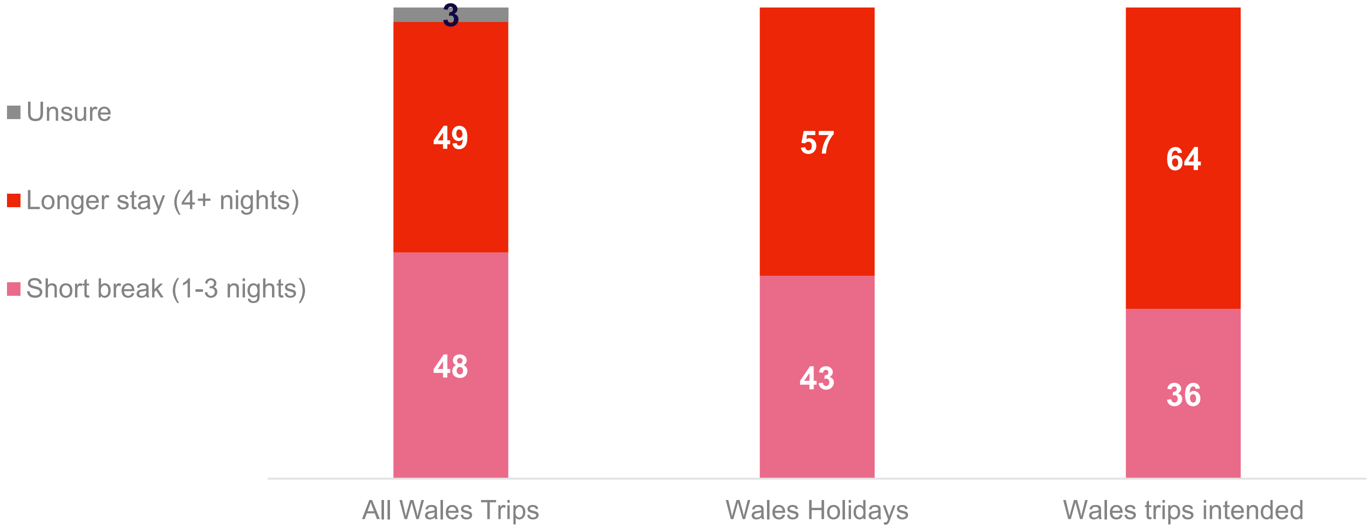


VB13f. In what type/s of accommodation did you stay in during your U.K. trip in July/August?
Base: All respondents that took a trip exclusively to Wales in July/Early August All Wales trips n=80; Wales holidays n=62

Length of trips taken in July/Early August

- Broadly consistent with trip intentions, Wales holidays are more likely to have been longer stays than short breaks, with around six in ten trips taken as longer holidays and four in ten trips taken as short breaks.

Figure 14. Length of Wales July/August trip, Net percentage, Weeks 10-13, U.K.

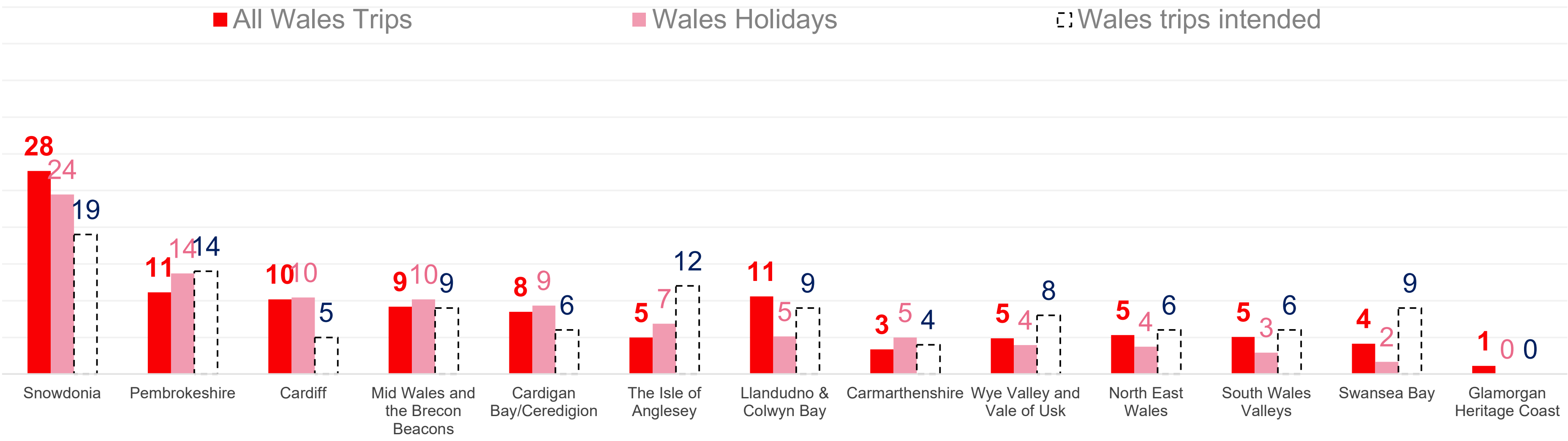


VB13b. Was this trip in July a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents that took a trip exclusively to Wales in July/Early August All Wales trips n=80; Wales holidays n=62

Where Wales trip-takers visited in Wales

- Holiday-makers to Wales are most likely to have stayed in Snowdonia, followed by Pembrokeshire and Cardiff. Snowdonia attracted more holiday-makers than intended, as did Cardiff, whilst Pembrokeshire sits at around average.

Figure 15. Areas of Wales visited on trip in July/August, Percentage Weeks 10-13, U.K. and Wales

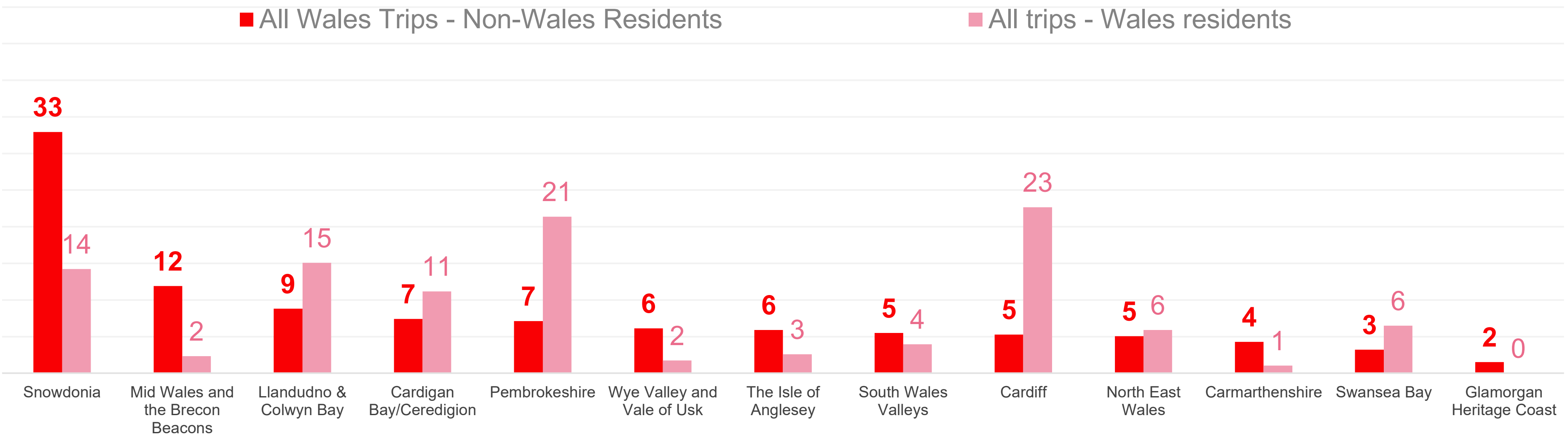


VB13cii. Where specifically in these areas did you stay?
Base: All respondents that took a trip exclusively to Wales in July/Early August All Wales trips n=80; Wales holidays n=62

Where Wales trip-takers visited in Wales

- Non-Wales residents are most likely to have visited Snowdonia on their holiday or short break in Wales, followed by Mid Wales and the Brecon Beacons and Llandudno/Colwyn Bay.   Reflecting access and population density, Wales residents are more likely to have visited South and West Wales destinations – Cardiff and Pembrokeshire the two most popular.

Figure 15. Areas of Wales visited on trip in July/August, Percentage Weeks 10-13, U.K. and Wales



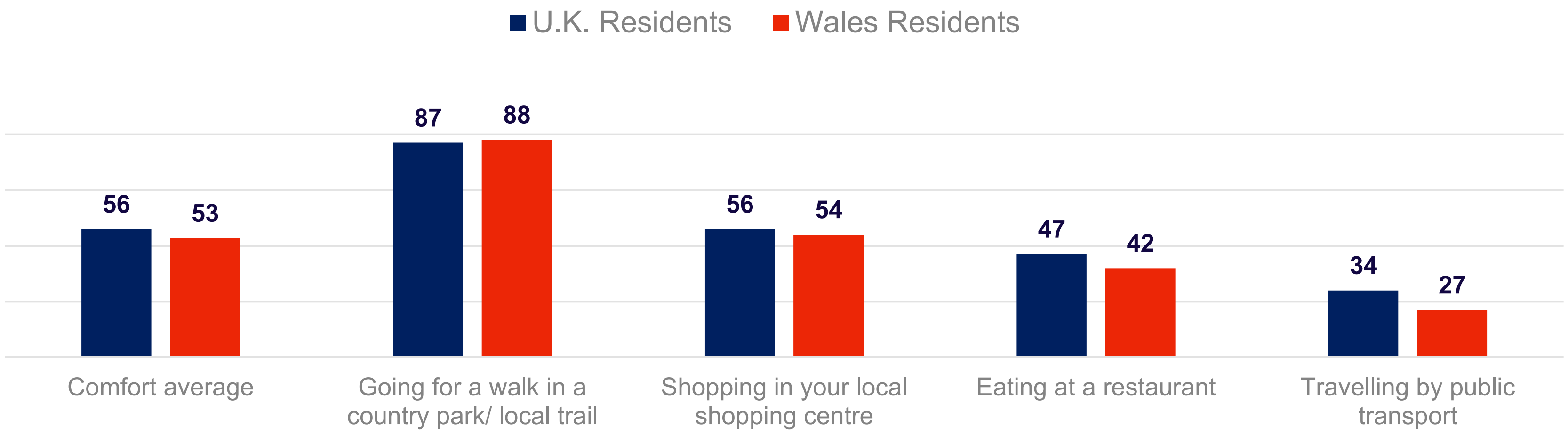
VB13cii. Where specifically in these areas did you stay?
Base: All respondents that took a trip exclusively to Wales in July/Early August Non Wales residents n=45; Wales residents n=58

Profiling the Autumn/Winter short break and holiday market

Level of comfort undertaking activities with a ‘comfort average’

- Wales residents feel more comfortable conducting ‘everyday activities’ than in weeks 5-8 with the proportion of Welsh public who are comfortable undertaking different activities increasing from 46% to 53%. There has been a rise in the proportion who are comfortable towards indoor activities – with the proportion of Wales residents comfortable with ‘eating at a restaurant’ rising from 28% to 42%.
- Consistent with previous weeks, U.K. residents generally feel more comfortable than Wales residents, particularly ‘travelling by public transport’.

Figure 16. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Percent, Weeks 9-13, U.K. and Wales

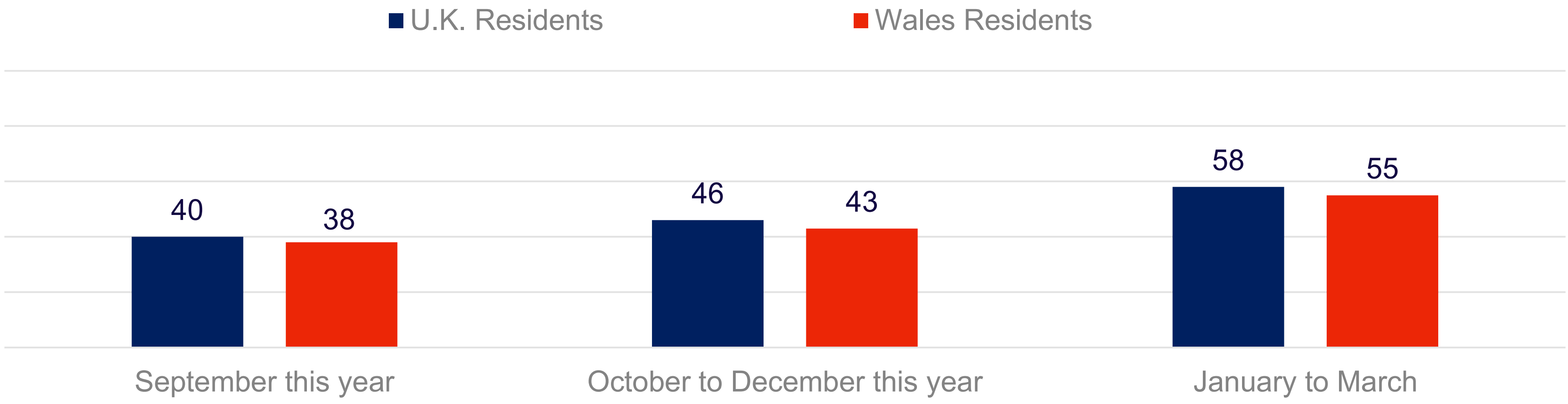


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. residents n=8,947; All Wales residents n=1,066

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

- Among Wales and U.K. residents, confidence about taking a U.K. holiday or short break in September is relatively consistent with research conducted a month earlier. Confidence in trips going ahead in October to December and January to March is lower. Data from week 13 suggests that confidence has recently dropped even further (September at 34% and October to December at 41%). This increasing pessimism towards winter trips, may be driven by fears of a second wave of COVID-19 – other research suggests this eventuality is anticipated by the vast majority of the U.K. public – and local lockdowns (August saw lockdowns in parts of the North of England and Scotland).

Figure 17. Confidence in taking a U.K. short break or holiday across a range of different months, Net percentage very and fairly confident, Weeks 9-13, U.K. and Wales

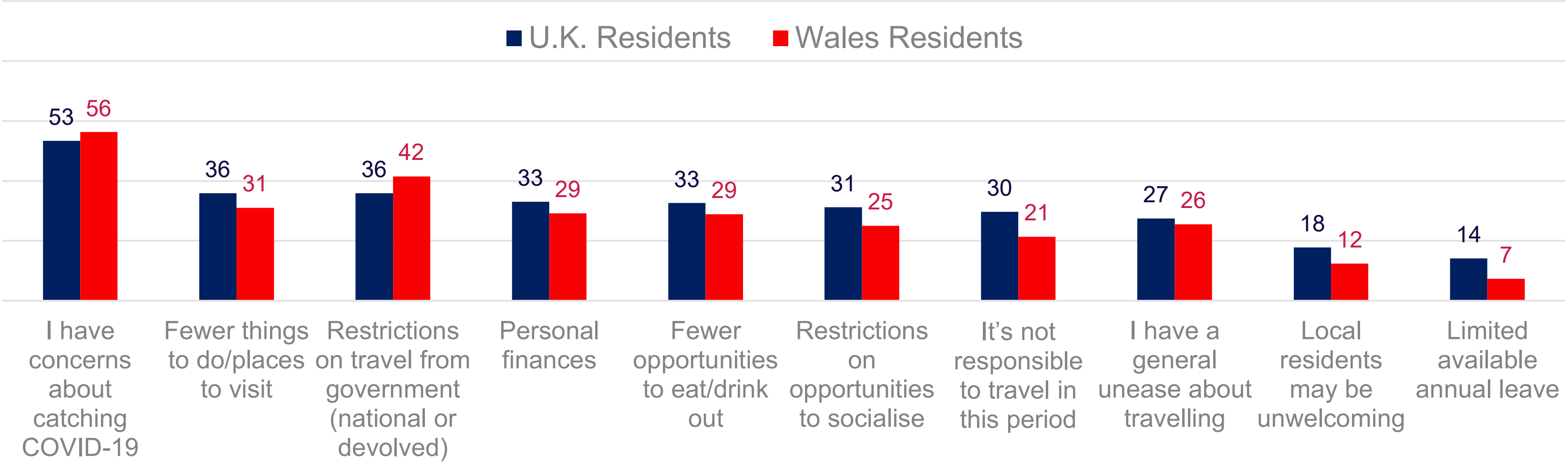


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Base: All U.K. residents n=8,947; All Wales residents n=1,066

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

- ‘I have concerns about catching COVID-19’ remains the main reason for lack of confidence about taking a domestic holiday or short break amongst both U.K and Wales residents – this is higher than in weeks 5 to 8, perhaps reflecting the greater availability of ‘things to do’ as restrictions have been lifted
- Wales residents remain more likely than the wider U.K. public to cite ‘restrictions on travel from government’ as a reason for lack of confidence, but the gap between the two has closed since weeks 5-8 (from 10 percentage points to 6). Other factors are currently less influential.

Figure 18. Reasons for not being confident about travelling from September onwards
Percentage, Weeks 9-13, U.K. and Wales

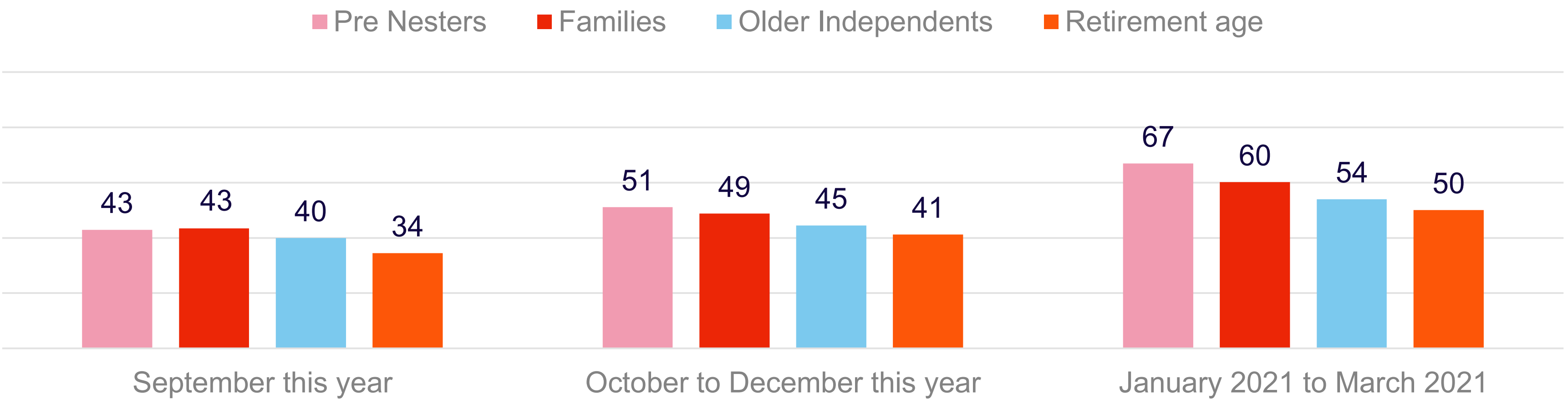


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between September and September? Base: U.K. residents n=4133; Wales residents n=504

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

- Confidence remains relatively consistent across life stages in September, with the exception of retirees who are less confident.
- Pre-nesters' are the most confident life stage from September onwards, although this life stage is also the most likely to cite 'personal finances' as a barrier to taking a trip (see next slide), suggesting there is limited scope for them to engage in 'high spend' trips
- All life stages exhibit a decline in confidence in October to December this year and from January 2021 onwards

Figure 19. 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 9-13, U.K.

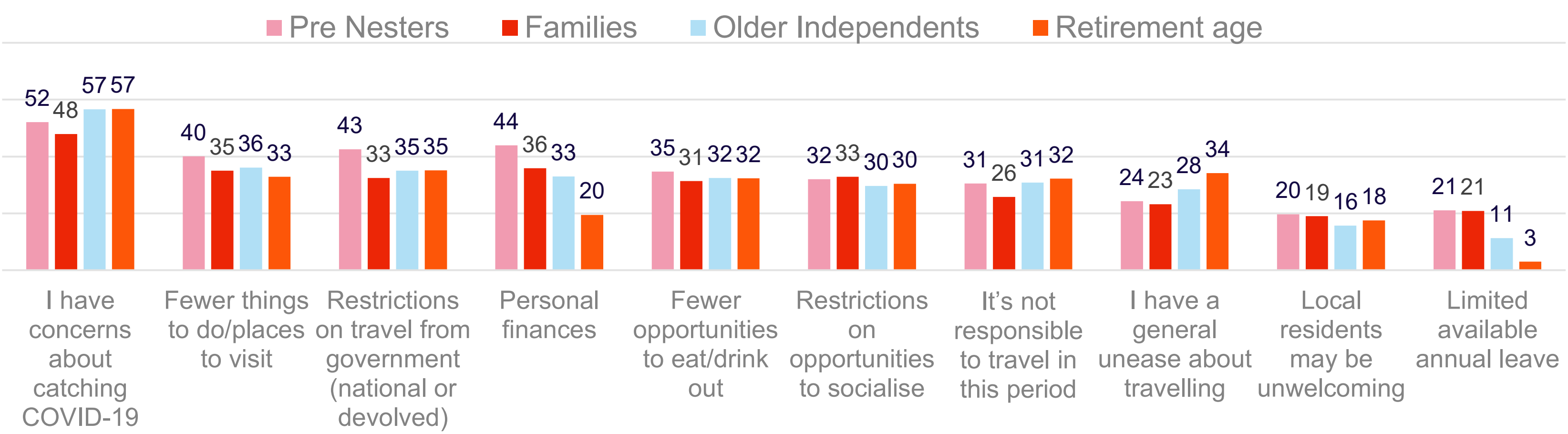


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Base: U.K. Pre-nesters n=2001, Families n=2512, Older Independents n=2,131, Retirement Age n=1576

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

- There are varying reasons different life stages would not be confident about taking a U.K. trip between September to March. Concerns about catching COVID-19 remains the most mentioned reason for not taking a trip in the U.K – this has increased compared to weeks 5 to 8 across all life stages.
- Pre-nesters index higher for 'restrictions on travel from government' as well as 'fewer things to do/places to visit' and restricted opportunities to socialize.
- Both Pre-nesters and Families cite 'personal finances' and limited annual leave as reasons for not travelling – a factor that remains less important for Older Independent and Retirees.

Figure 20. Reasons for not being confident about travelling between September to March by life stage, Percentage, Weeks 9-13, 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=695, Families n=783, Older Independents n=660, Retirement Age n=447

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

- There is a substantially higher proportion of UK and Welsh residents who state they will take fewer compared to more domestic short breaks or holidays between now and the end of the year, with 38-40 per cent stating they will take fewer trips compared to 14-15 per cent more trips.
- Around two in five (44%) U.K. residents anticipate taking the same amount or more domestic short breaks or holidays by the end of the year, a similar proportion to weeks 5-8.
- Wales residents are slightly more likely to state they will take fewer UK trips this year or to still be unsure, consistent with previous results.

Figure 21. Number of U.K. short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 9-13 , U.K. and Wales

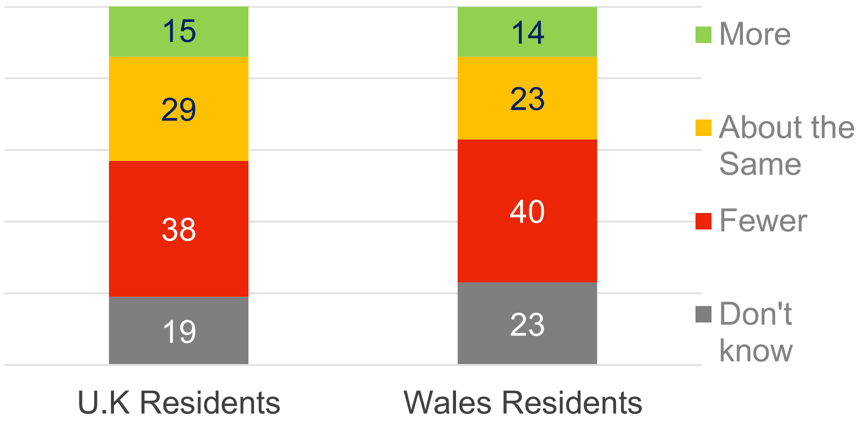
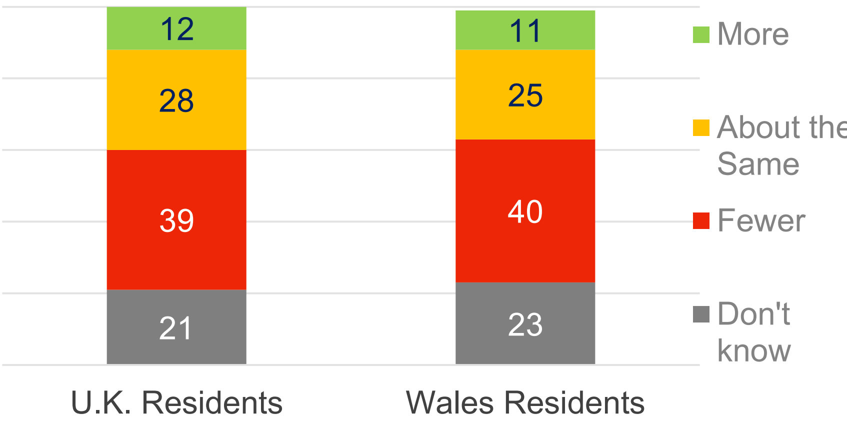


Figure 22. Number of U.K. holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 9-13, U.K. and Wales



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=8,947; All Wales residents n=1,066

Anticipated number of Overseas trips this year compared to normal

- As in weeks 5 to 8, 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.
- Just under half state they will be taking fewer overseas trips this year.
- However, there are around one in three people who are still unsure about overseas trip taking and may be prepared to travel if the situation improves.

Figure 23. Number of OVERSEAS short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 9-13 , U.K. and Wales

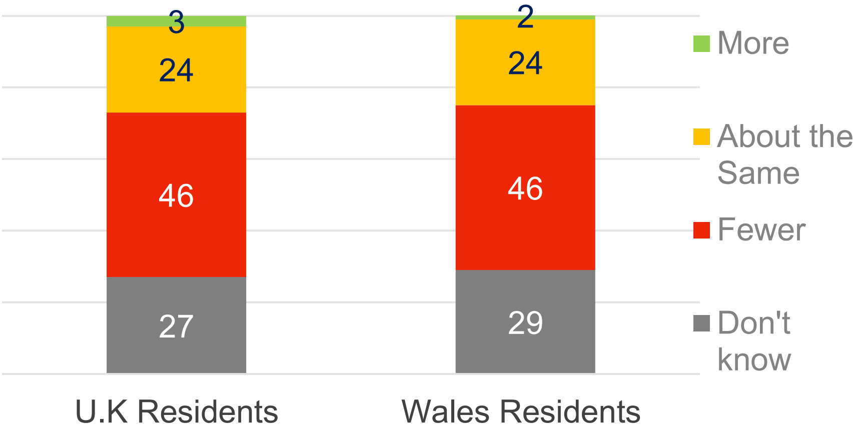


Figure 24. Number of OVERSEAS holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 9-13, U.K. and Wales

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=8,947; All Wales residents n=1,066

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

- 1 in 5 U.K. and Wales residents plan on taking a domestic short break or holiday this autumn (September or October), whilst around 1 in 4 intend to take a trip in the winter months (November to March). A further 1 in 5 U.K. residents don't currently know when they will take their next trip, rising to 1 in 4 of Wales residents.
- Around 1 in 12 of both U.K. and Wales residents who took an overnight trip in July or August also anticipate taking one between September and March 2021.

Figure 25. Proportion anticipating a trip in each time period , Percentage, Weeks 9-13, U.K.

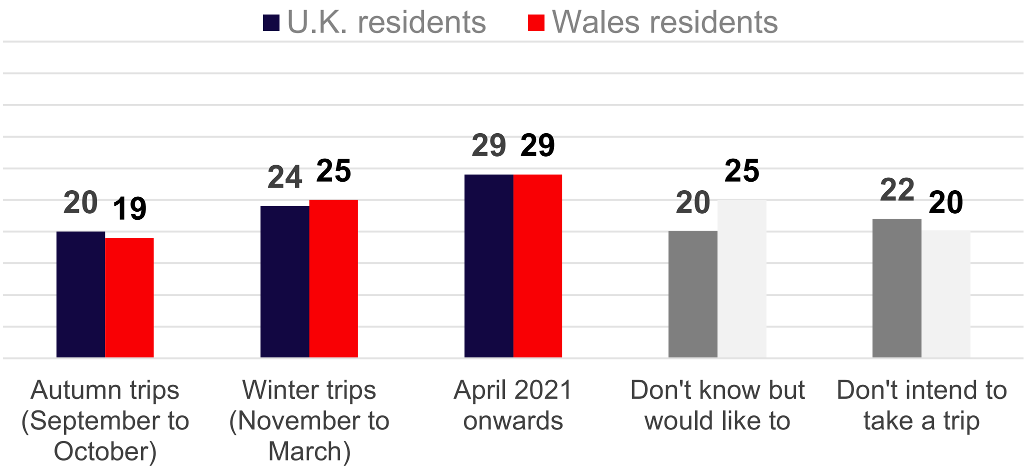
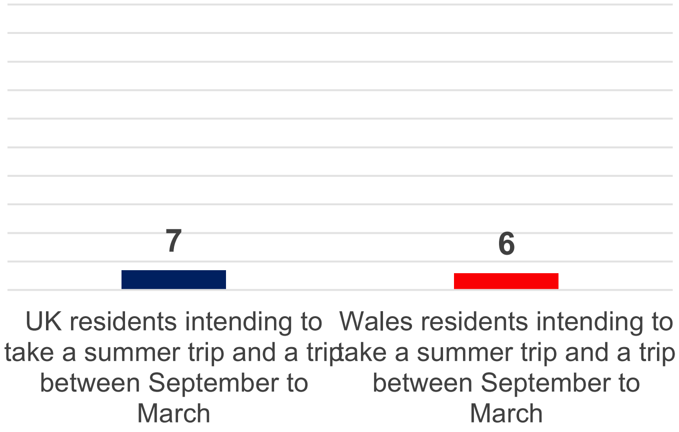


Figure 26. Proportion of multiple trip takers, Percentage, Weeks 9-13, U.K.



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 9-13 U.K. population n=8,947; Wales population n=1,066

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

- 7 in 10 of those planning an autumn overnight stay in Wales and 9 in 10 planning a winter stay are yet to have booked their trip
- There is also a minority who have planned their trips to Wales for autumn and winter.
- This is a similar pattern to those intending to take trips across the UK as a whole, indicating an opportunity for Wales to attract visitors during these periods.

Figure 27. Proportion of Intenders that have already *planned* their trip , Percentage Weeks 12-13, U.K. and Wales

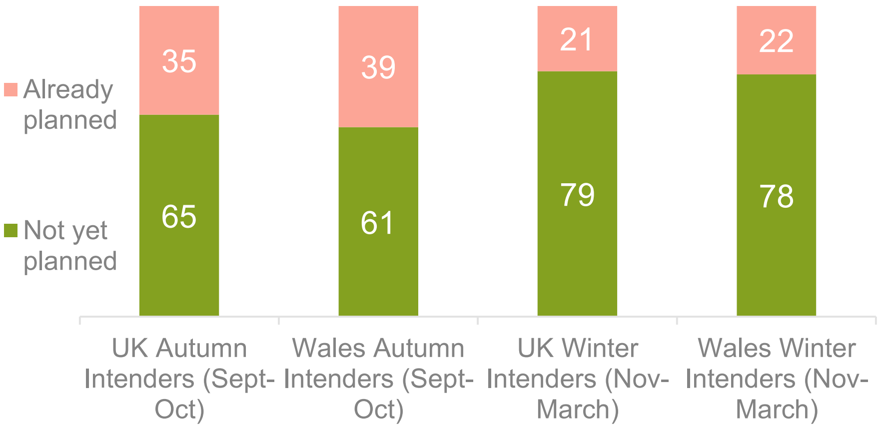
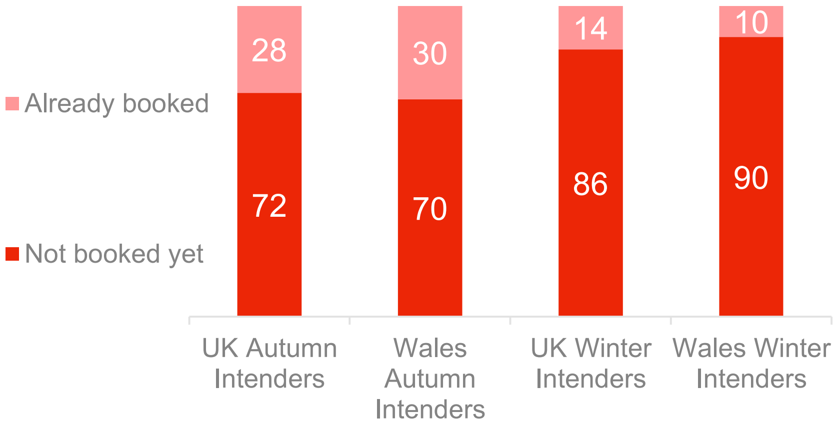


Figure 28. Proportion of Intenders that have already *booked* their trip , Percentage Weeks 12-13, U.K. and Wales

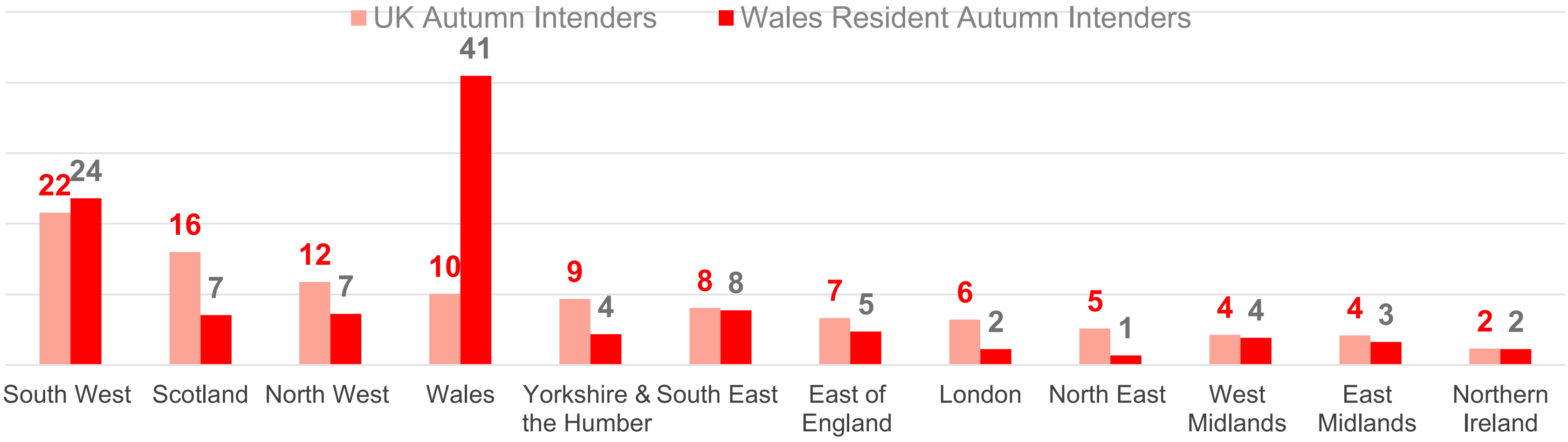


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Week 12 to 13 U.K. autumn intenders n=531 ;Wales Inclusive autumn intenders n=66; U.K. winter intenders n=481; Wales Inclusive winter intenders n=75

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

- 10% of U.K. autumn intenders plan on going to Wales for their next U.K. short break or holiday, the fourth most preferred U.K. region. The South West is the number one preferred choice followed by Scotland and the North West of England.
- Wales is the main destination for Wales residents who plan to take a trip in the autumn, (41%), but the South West of England is also a popular place being considered by many Welsh residents (24%), as it was over the Summer period.

Figure 29. Where planning on staying on next U.K. overnight trip for autumn intenders (September and October) , Percentage Weeks 9-13, U.K. and Wales Residents

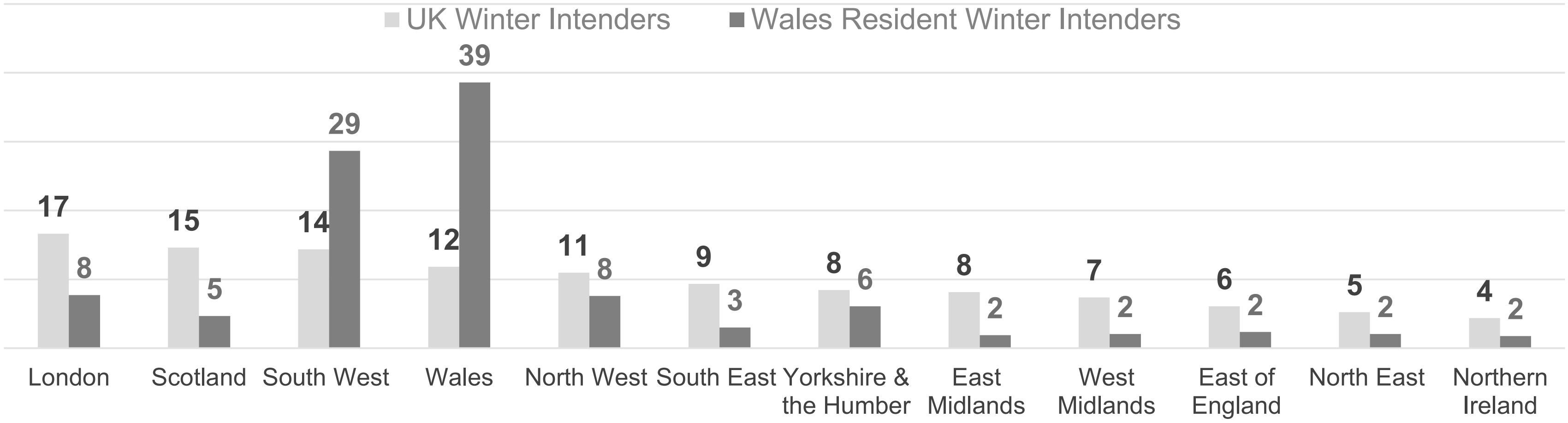


QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the U.K. in autumn U.K. Intenders n=1,293, autumn Wales Resident Intenders n=153

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

- 12% of U.K. 'winter intenders' are likely to stay in Wales between November to March – the fourth most preferred destination, behind London, Scotland and the South West of England.
- London is much more popular amongst those planning a winter trip compared to autumn, whereas the South West of England is a more popular destination for the autumn.
- As in the autumn months, Wales is the number one preferred winter destination for Wales residents, again followed by the South West of England.

Figure 30. Where planning on staying on next U.K. overnight for winter intenders (November to March), Percentage, Weeks 9-13, U.K. and Wales



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. winter U.K. Intenders n=1,196 winter Wales Resident Intenders n=153

Destination consideration amongst Wales intenders

- Around a third of Wales autumn and winter intenders are only considering Wales as the destination for their next domestic break. The South West of England and Yorkshire are the two most preferred alternative choices for autumn trips, while Scotland and London are the two leading alternative choices for winter.

Figure 31. Consideration of Wales and other places, Percentage Weeks 9-13, U.K. and Wales

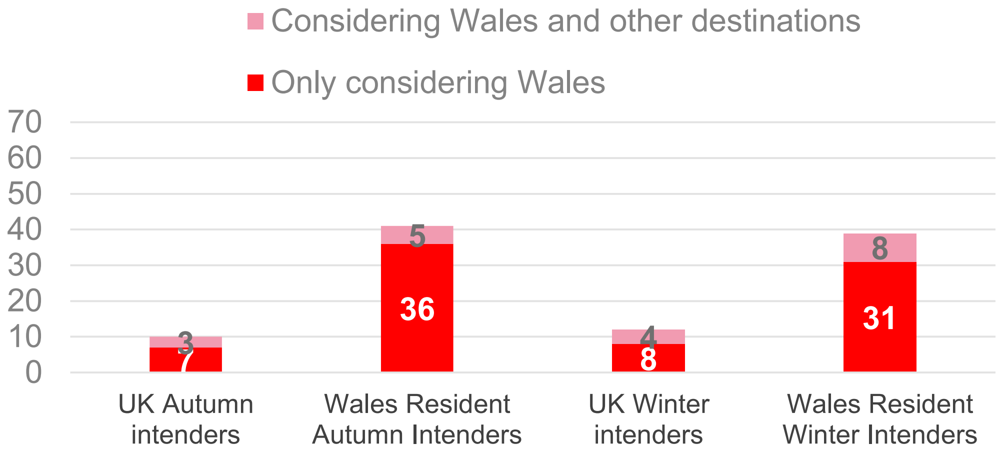


Table 1. Top 5 alternative destinations for Wales intenders

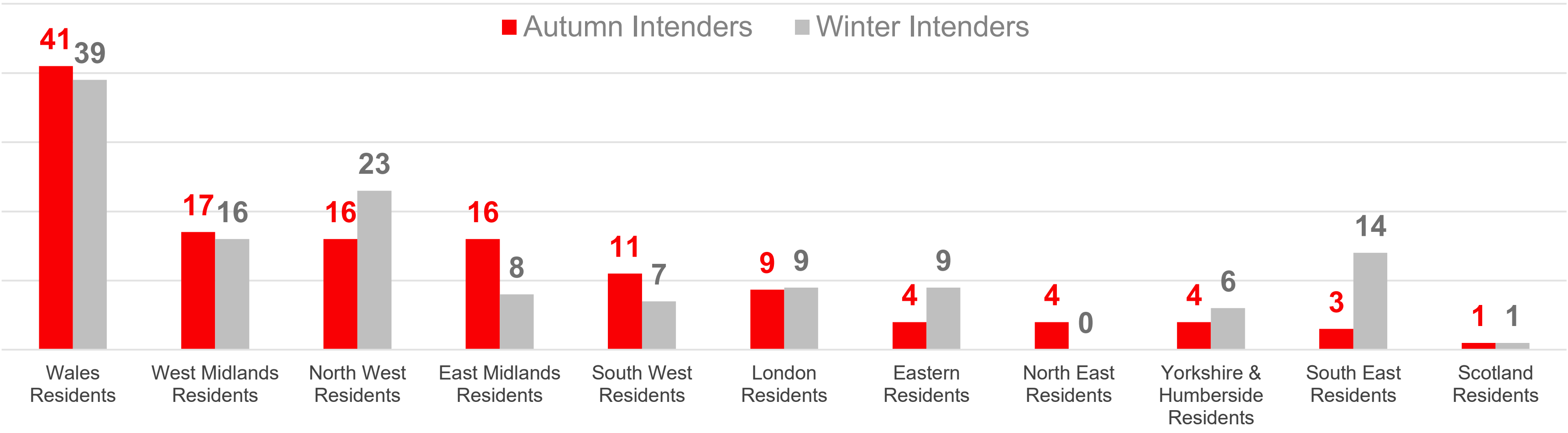
Wales Autumn Intenders		Wales Winter intenders	
South West	8%	Scotland	15%
Yorkshire	8%	London	10%
Scotland	7%	Yorkshire	10%
East of Eng.	5%	South West	8%
West Mids.	4%	North West	8%

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 autumn U.K. Intenders n=1,293, autumn Wales Resident Intenders n=151; winter U.K. Intenders n=1,196 winter Wales Resident Intenders n=153

Intentions to stay in Wales by region of residence

- Consistent with summer intenders, residents of Wales, the West Midlands, the North West of England and the East Midlands are the most likely to be considering an autumn holiday or short break in Wales this year.
- In the winter months, residents from Wales, the North West of England, West Midlands and the South East of England are most likely to be considering a trip to Wales

Figure 32. Proportion of intenders planning on staying in Wales on next U.K. holiday or short break by region of residence, Percentage Weeks 9-13, U.K. and Wales

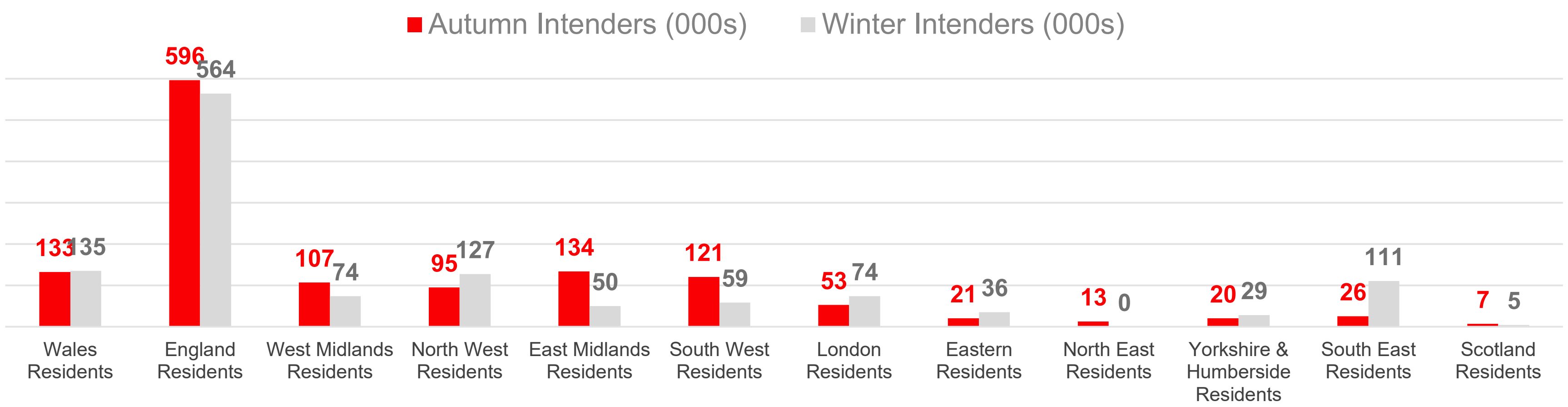


QVB4b. Where in the U.K. do you expect to be staying on this next holiday or short break? Where do you live?
Base: All residents planning on taking a holiday or short break in the U.K. in the autumn/winter. Residents in each region South West n= 109/85; Scotland n=227/161; North West n=125/127; London n=132/195; Yorkshire and The Humber n=88/85; South East n=135/26; West Midlands n=92/73; East Midlands n=95/70; East of England n=65/;49; North East 56/45 Wales n=153/153

Intentions to stay in Wales by region of residence

- Consistent with summer intenders, residents of Wales, the West Midlands, the North West of England and the East Midlands are the most likely to be considering an autumn holiday or short break in Wales this year.
- In the winter months, residents from Wales, the North West of England, West Midlands and the South East of England are most likely to be considering a trip to Wales

Figure 32b. Proportion of intenders planning on staying in Wales on next U.K. holiday or short break by region of residence, Numbers (000s), Weeks 9-13, 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. in the autumn/winter. Residents in each region South West n= 109/85; Scotland n=227/161; North West n=125/127; London n=132/195; Yorkshire and The Humber n=88/85; South East n=135/26; West Midlands n=92/73; East Midlands n=95/70; East of England n=65/;49; North East 56/45 Wales n=153/153

Demographics of Wales intenders compared to general population

- There is a notable change in the profile of people intending to visit Wales from September onwards compared to the Summer period.
- Older Independents and Retirees make up a much higher proportion of people intending to visit Wales in the autumn, with the former a key audience in September.
- Unsurprisingly, families who showed higher visitation over the Summer months, are less likely to be planning a visit in September with the return to School, but intentions increase in October when the half term holiday is taken.
- Pre-nesters have lower representation than the general population in all time periods other than the ‘winter’.
- Social grade representation is broadly in line with the population across most periods with the exception of November to March, where ABs are less well represented.

Figure 33. Breakdown of populations and intenders by life stage, Percentage Weeks 9-13, U.K. and Wales

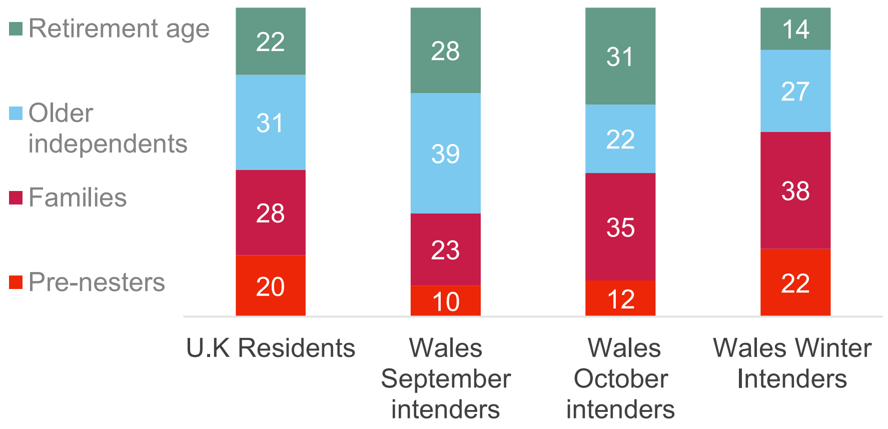
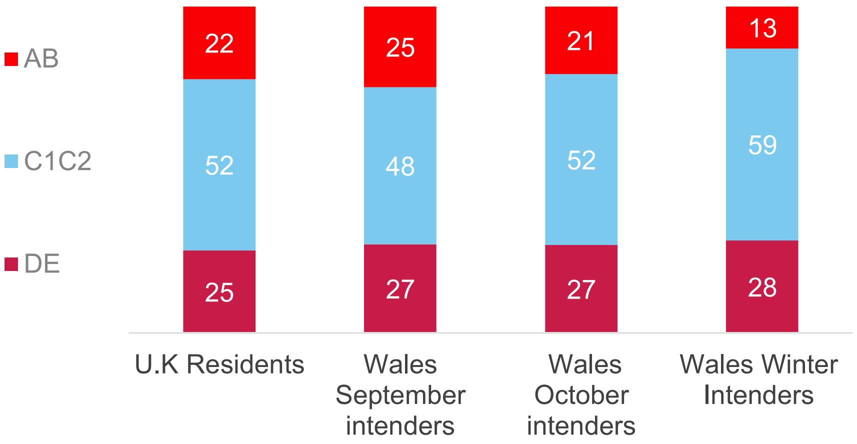


Figure 34. Breakdown of populations and intenders by social grade, Percentage Weeks 9-13, U.K. and Wales



Source: Demographics. Base: All respondents. U.K. population n=8947; Wales summer (September to August) intenders n=135, Wales September intenders n=98; Wales October intenders n=61, Wales Winter (November to March) Intenders n=157. *Autumn split to show differences in life stage between September and October.

Life stage and social grade combined

- AB and C1C2 Older independents have the highest representation relative to the U.K population for trips to Wales in September
- DE retirees tend to over index for trips in autumn (in both September and October)

Table 2. Life stage and social grade combined, Percentage, Weeks 9-13, U.K.

	U.K. Population	Wales September intenders	Wales October intenders	Wales Winter Intenders
Pre-nesters – AB	4%	1%	3%	8%
Pre-nesters - C1C2	11%	7%	6%	12%
Pre-nesters – DE	5%	1%	2%	2%
Families – AB	9%	11%	13%	14%
Families - C1C2	15%	10%	**20%**	22%
Families – DE	3%	2%	1%	2%
Older Independents – AB	5%	9%	5%	6%
Older Independents - C1C2	19%	**23%**	13%	18%
Older Independents – DE	7%	7%	4%	3%
Retirement age – AB	4%	6%	5%	1%
Retirement age - C1C2	7%	8%	13%	7%
Retirement age - DE	11%	14%	14%	6%

Source: Demographic questions. Base: All respondents. U.K. population n=8947; Wales summer (September to August) intenders n=135, Wales September intenders n=98; Wales October intenders n=61, Wales Winter (November to March) Intenders n=157.

Financial segments and financial impact of COVID-19 on intenders

- Wales autumn intenders are more likely than Wales winter intenders to put themselves in the ‘things are OK but I have to be careful’ category in relation to the financial impact of COVID-19. Winter intenders are significantly more likely than autumn intenders to have had their employment impacted in some way. This will in part relate to life stage – autumn intenders are more likely to be retirees – but also suggests that uncertain employment may be a barrier to taking overnight trips in the near-term. As furlough ends in October, lack of employment may be a further barrier to winter intenders taking their trips. Are there opportunities for booking incentives to help this type of intender?

Figure 35. Breakdown of intenders by financial segments, Percentage Weeks 9-13, U.K. and Wales

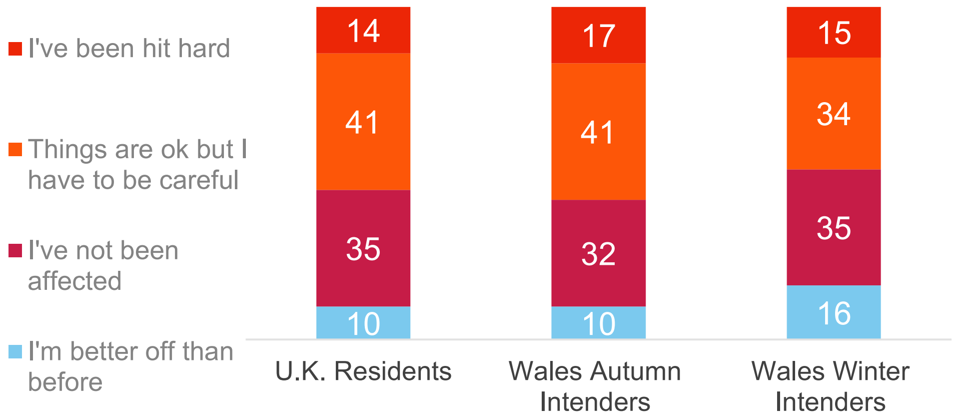
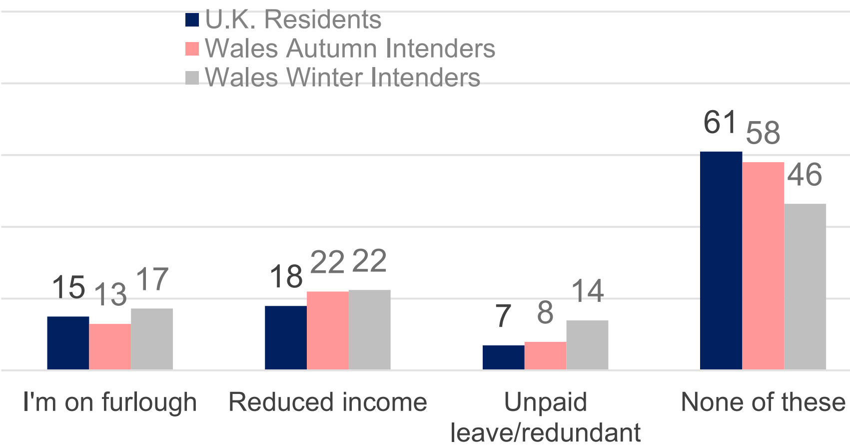


Figure 36. Employment impact on intenders, Percentage Weeks 9-13, U.K. and Wales

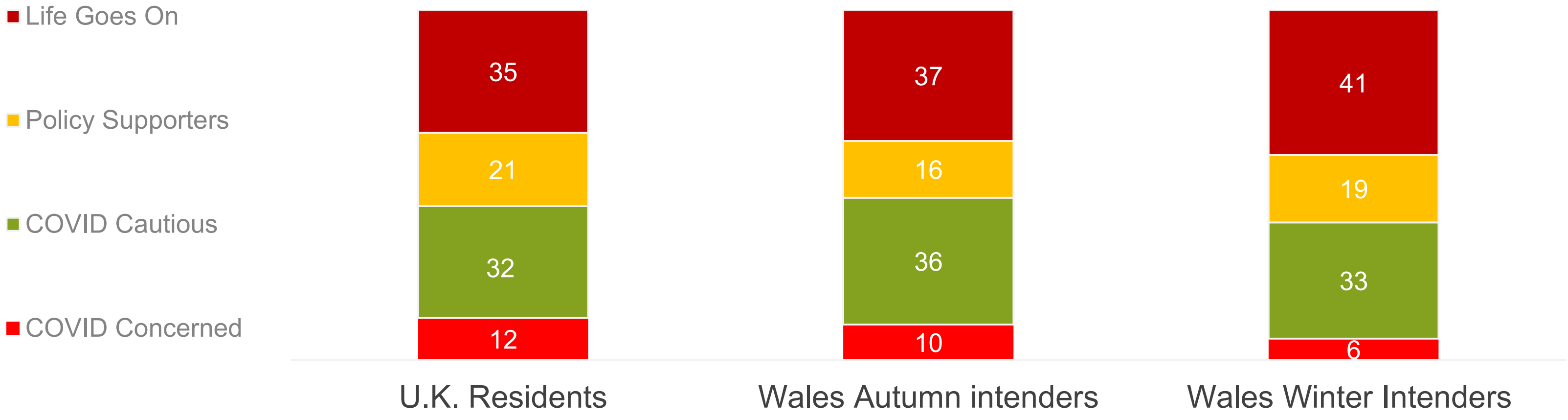


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=8947; Wales summer (September to August) intenders n=135, Wales September intenders n=98; Wales October intenders n=61, Wales Winter (November to March) Intenders n=157.

Attitudinal segments (see definitions page for more information)

- The 'life goes on' attitudinal segment continues to make up nearly 2 in 5 of Wales autumn intenders, and similar proportions of autumn and winter intenders.

Figure 37. Breakdown by life stage, Percentage Weeks 12-13, U.K.



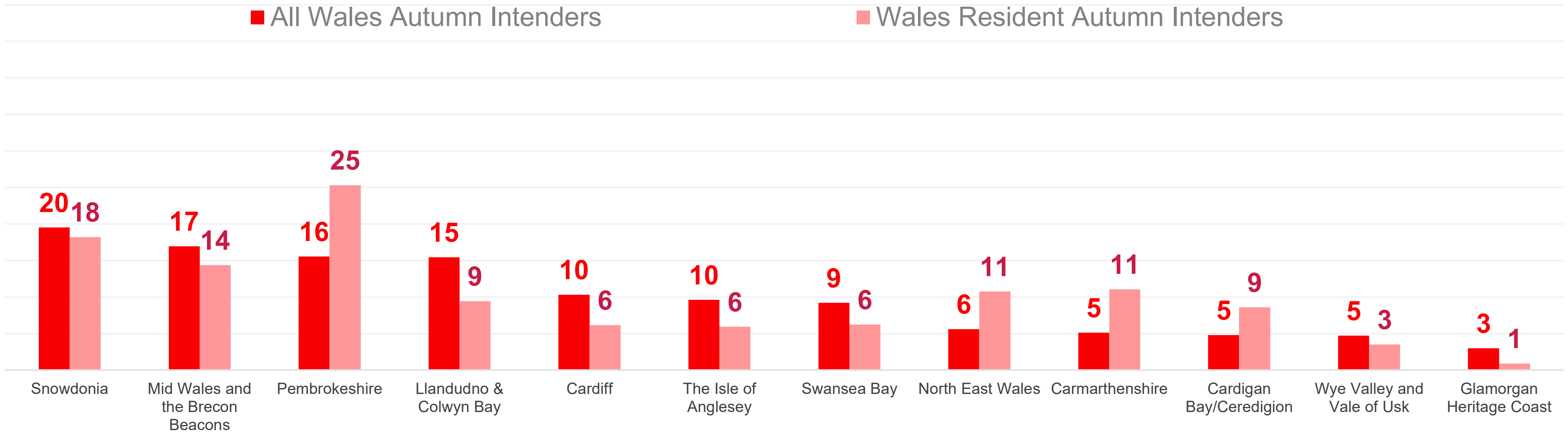
Base: All respondents weeks 12-13. Wales autumn intenders n=89; Wales Winter Intenders n=62

Trip Plans

Where planning on staying in Wales on next Wales autumn trip

- Snowdonia remains the preferred destination ahead of Mid Wales and the Brecon Beacons, Pembrokeshire and Llandudno and Colwyn Bay
- Amongst Wales residents, Pembrokeshire is the most popular destination in autumn.
- Welsh residents are intending to visit a broader range of less visited destinations in the autumn.

Figure 38. Planned destination for next Wales trip for autumn intenders , Percentage Weeks 9-13, U.K. and Wales

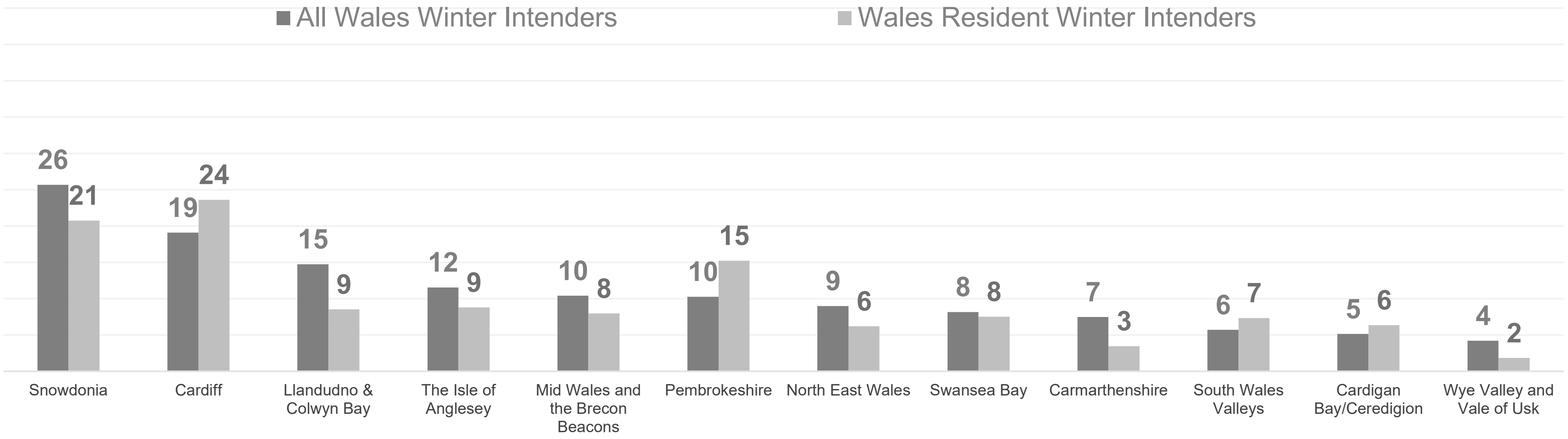


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?8
Base: All respondents planning on taking a holiday or short break in Wales. All Wales autumn intenders n=158; Wales Resident autumn intenders n=66*; *Base sizes small – treat indicatively only

Where planning on staying in Wales on next Wales winter trip

- Snowdonia is also the most popular destination for a trip to Wales in the winter months followed by Cardiff, Llandudno & Colwyn Bay.
- Amongst Wales residents, Cardiff and Snowdonia are now the most preferred choices for winter trips, with Pembrokeshire falling to third most popular.

Figure 39. Planned destination for next Wales trip for winter intenders, Percentage, Weeks 9-13, U.K. and Wales

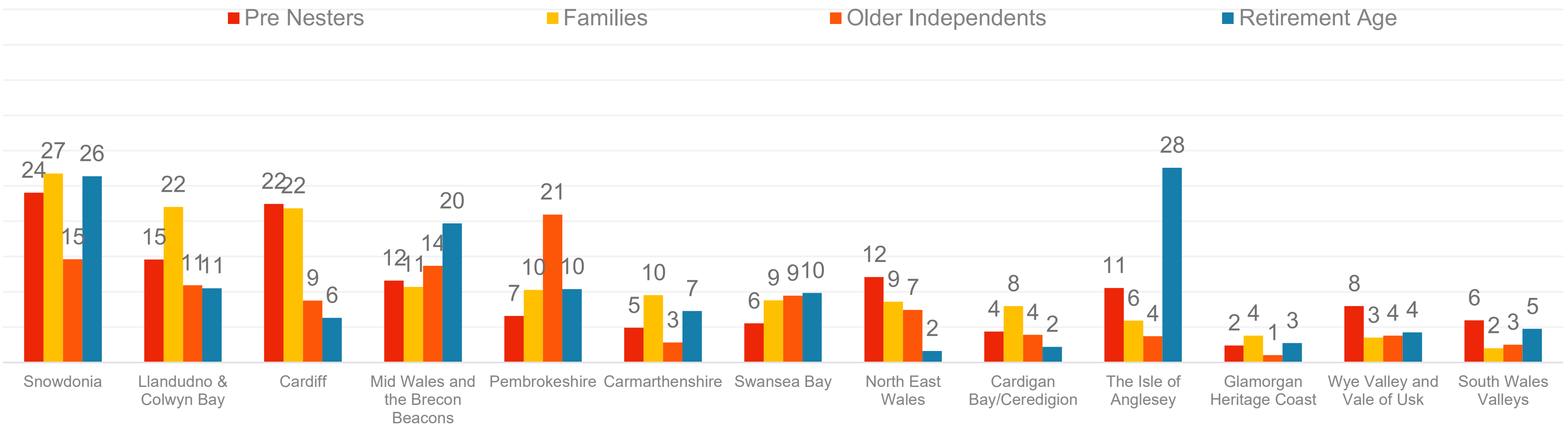


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?8
Base: All respondents planning on taking a holiday or short break in Wales. All Wales winter intenders n=156; Wales Resident winter intenders n=60* *Base sizes small – treat indicatively only

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

- Intentions to visit destinations within Wales differs across life stages.
- Pre-nesters are most likely to plan a trip to Snowdonia, Cardiff and Llandudno & Colwyn Bay;
- Families are also most likely to be intending to visit Snowdonia, Cardiff and Llandudno & Colwyn Bay
- Older Independents are most likely to be intending to visit Pembrokeshire, Snowdonia and Mid Wales and the Brecon Beacons
- Retirees' are most likely to be intending to visit Anglesey, Snowdonia and Mid Wales.

Figure 40. Planned destination for next Wales trip for all intenders by life stage, Percentage, Weeks 9-13, U.K. and Wales, Ranked on families

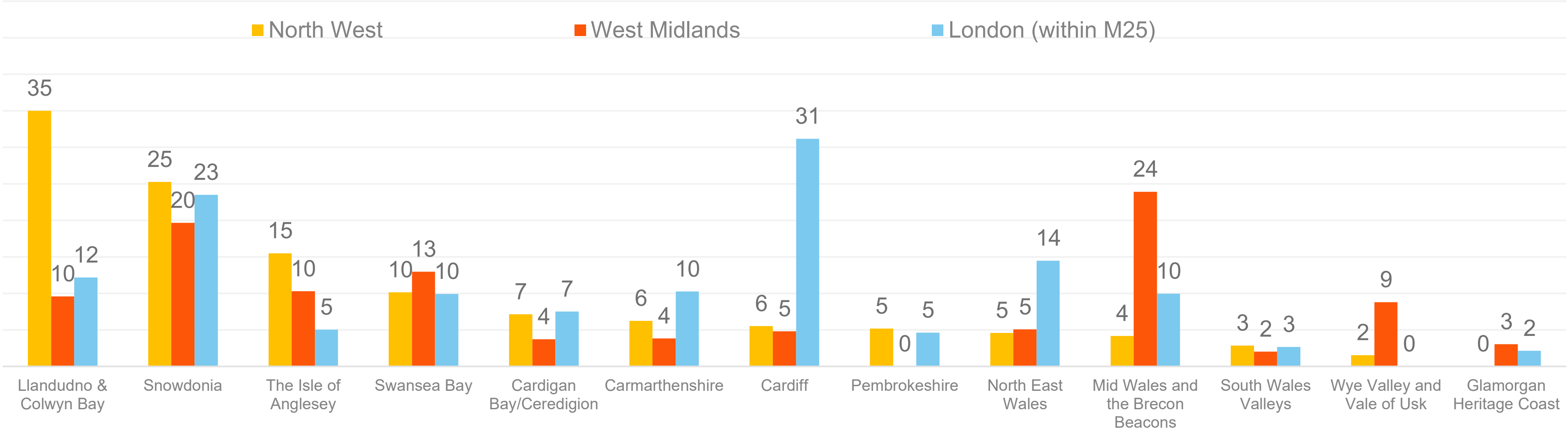


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales between September 2020 and March 2021 Pre-nesters n=70; Families n=117; Older Independents n=80; Retirement Age n=45

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

- The part of Wales that visitors are intending to visit broadly reflects their region of origin. People from the North West of England are most likely to be intending to visit North Wales destinations such as Llandudno & Colwyn Bay, Snowdonia and Anglesey.
- Those from the West Midlands are likely to visit a range of destinations across Wales, reflecting their broad access points with Mid Wales and the Brecon Beacons the most popular destination.
- London residents are most likely to be intending to visit Cardiff, although destinations in North Wales are also higher on their preference list

Figure 41. Planned destination for next Wales trip for all intenders by key regions, Percentage, Weeks 9-13, 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 September 2020 and March 2021 West Midlands n=27*; North West n=48*; London n=32*. *Base sizes very small. Use indicatively only

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

- Visitors to Wales in the autumn months are most likely to stay in the 'countryside or a village', followed by a 'traditional coastal/seaside town' and rural coastline.
- In the winter months, trips to the 'countryside or village' remain the most popular, followed by 'rural coastline' and 'traditional coastal/seaside town'.
- Preference for staying in a city or large town more than triples in the winter months compared to the autumn months (from 6% to 19%).

Figure 42. Main type of destination for Wales autumn intenders, Percentage Weeks 9-13, U.K.

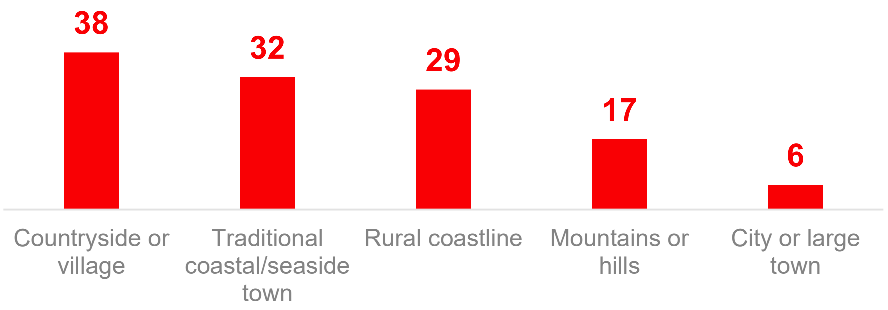


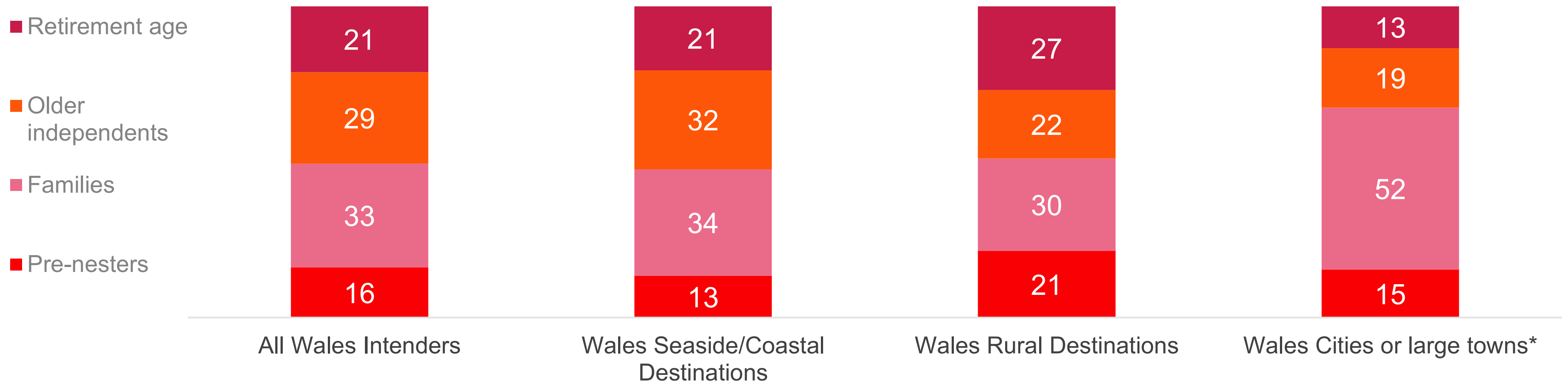
Figure 43. Main type of destination for Wales winter intenders, Percentage Weeks 9-13, U.K.

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 autumn intenders n=118;
Wales Exclusive winter intenders n=106

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.
- Families are interested in all types of destinations, and make up a higher proportion of people intending to visit Wales' cities or large towns
- Retirees and Pre-Nesters have higher intentions to visit Wales' rural destinations.

Figure 44. Life stage of Wales intenders by destination type, Percentage, Weeks 9-13, U.K.

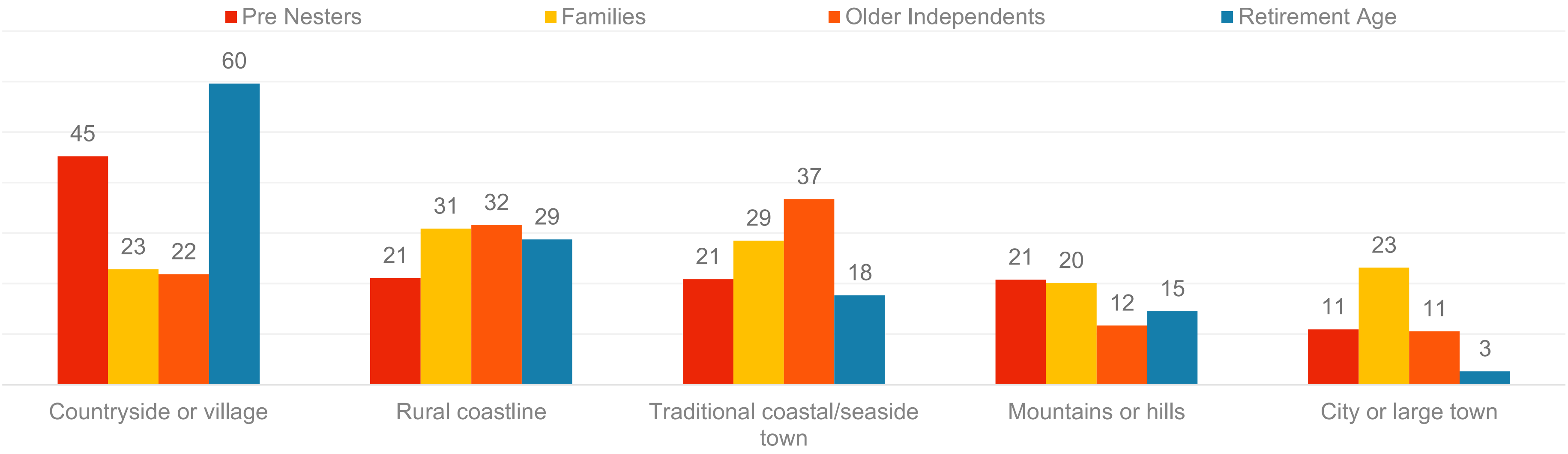


Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between September 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=186; Wales Rural Destinations (Countryside or village + mountains or hills) n=144; Wales Cities or large towns n=63* *Note: small base sizes – please treat indicatively.

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.
- Families are interested in all types of destinations, although coastal/seaside destinations are preferred
- Retirees and Pre-Nesters have higher intentions to visit Wales' rural destinations.

Figure 44b. Life stage of Wales intenders by destination type, Percentage, Weeks 9-13, U.K

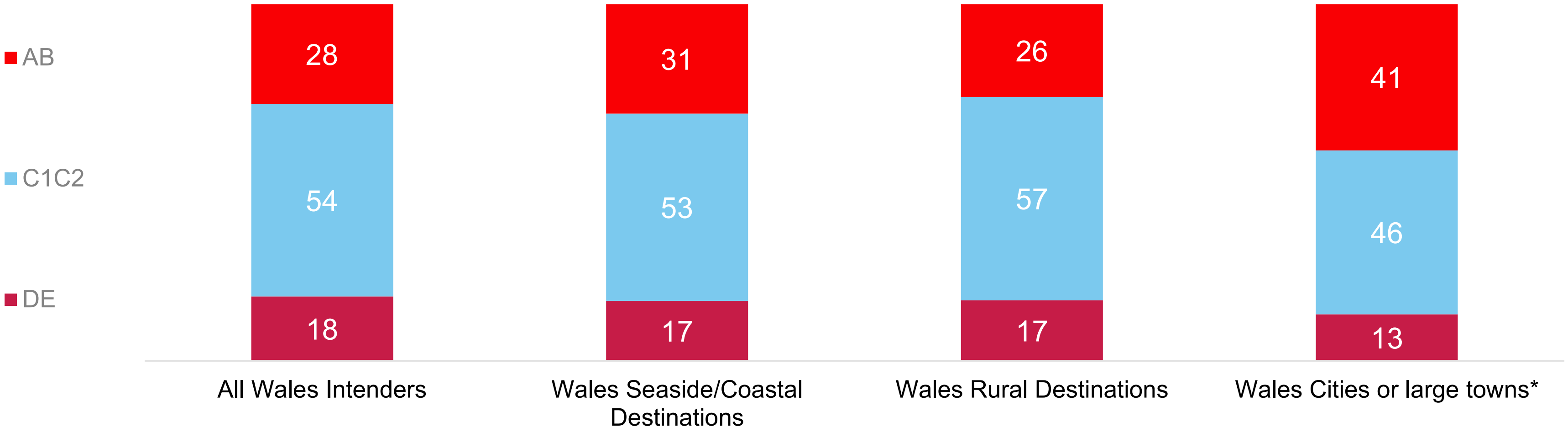


Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between September 2020 and March 2021 Pre-nesters n=56; Families n=75; Older Independents n=63; Retirement Age n=30

Social grade of Wales intenders - *by destination type*

- Each destination type is likely to attract a range of demographics with mid market C1C2 making up the largest group of people intending to visit each destination.
- People planning to visit Wales cities or large towns are much more likely to be from AB socio-economic groups.
- AB groups are also interested in visiting seaside and to a lesser extent rural destinations. .
- DE social grades make up a low proportion of intended visitors across all destination types.

Figure 45. Social grade of Wales intenders by destination type, Percentage Weeks 9-13, U.K.

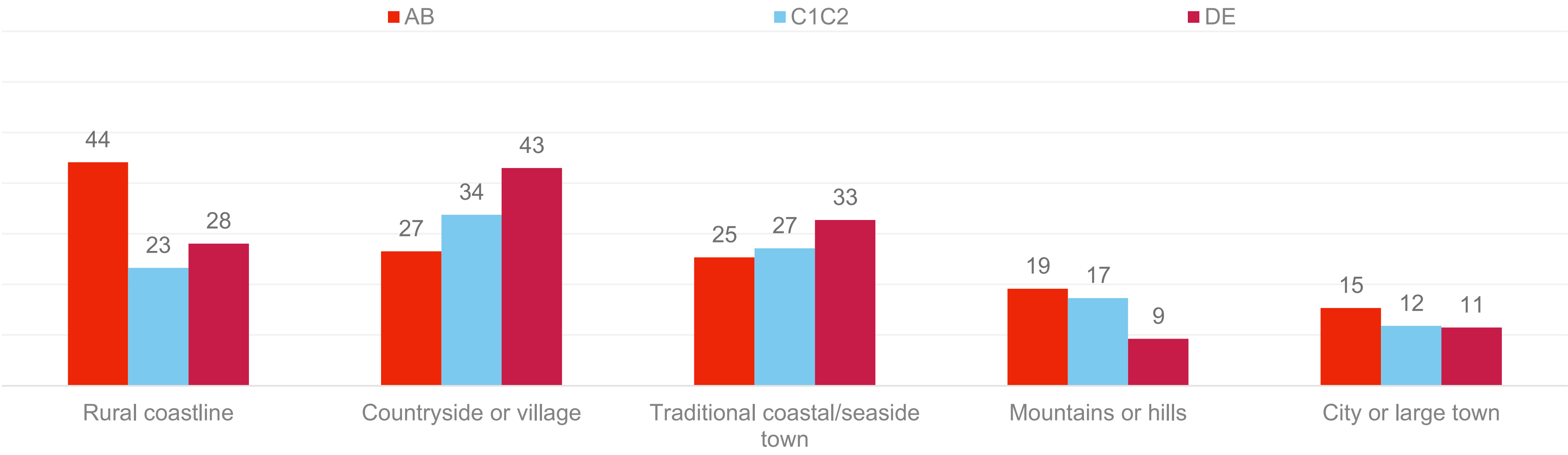


Demographic questions and QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break in Wales between September 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=186; Wales Rural Destinations (Countryside or village + mountains or hills) n=144; Wales Cities or large towns n=63* *Note: small base sizes – please treat indicatively.

Social grade of Wales intenders - *by destination type*

- AB visitors to Wales are most likely to visit rural coastline, followed by countryside or village. C1C2s (the biggest audience) are set to visit a mix of places. DEs (many of whom are retirees) index highest for trips to the countryside or villages

Figure 45b. Social grade of Wales intenders by destination type, Percentage Weeks 9-13, 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 September 2020 and March 2021. AB n=65, C1C2 n=100, DE n=59

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

- Across both the autumn and winter periods, visitor parties are most likely to travel to Wales with their partner, followed by child/grandchildren/young adults.
- Around a quarter of travellers in autumn and winter intend to visit with children in their party.
- Across both seasons, around 1 in 10 are planning to travel with a pet to Wales
- A higher proportion of winter intenders are likely to travel with their friends, making up one in five potential visitors.

Figure 46. Visitor party make-up for Wales autumn intenders, Percentage Weeks 9-13, U.K.

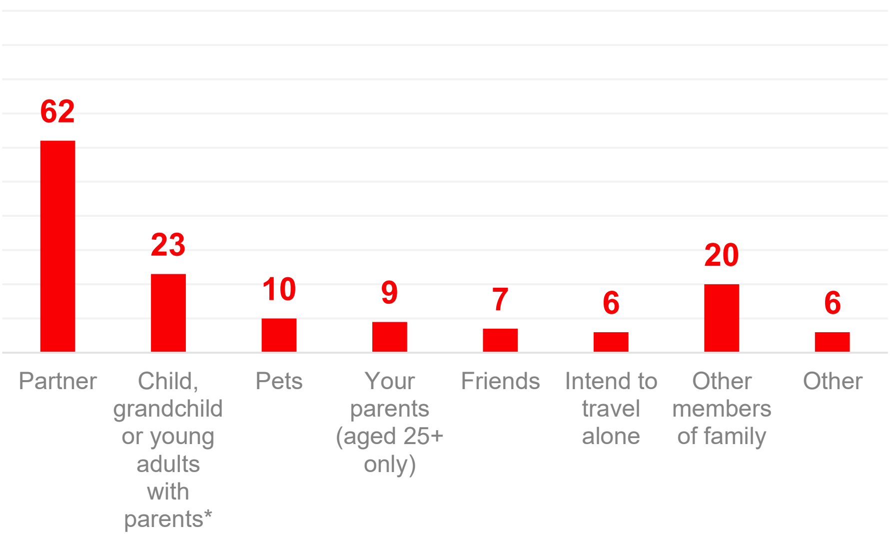
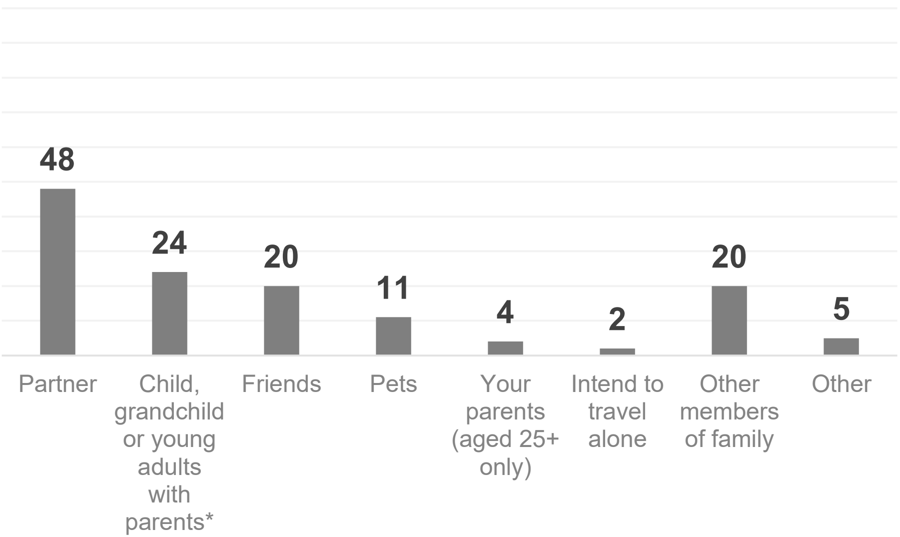


Figure 47. Visitor party make-up for Wales winter intenders, Percentage Weeks 9-13, U.K.



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 autumn intenders n=118; Wales Exclusive winter intenders n=106 *Child or young adults includes respondents that states 'children', 'grandchildren' and 16-24 year olds stating they will travel with their parents

Type of accommodation for next Wales short break or holiday

- There are similar types of accommodation being considered by people intending to visit Wales in the autumn and winter, but signs of a shift in intended usage compared to the summer period.
- Visitors who intend to go to Wales in autumn/winter are most likely to stay in commercial self-catering – around 2 in 5 planning to do so.
- Caravan and camping is attracting a lower level of intended use compared to the summer, but is intended to be used by around a third of visitors.
- There are higher intentions for visitors to stay in serviced accommodation in the winter (48%) than the autumn (39%), and these are much higher than use of serviced accommodation on trips to Wales during the summer period (22%).

Figure 48. Accommodation planning on staying in on next U.K. overnight trip for Wales <u>autumn intenders</u>, Net percentage Weeks 9-13, U.K.

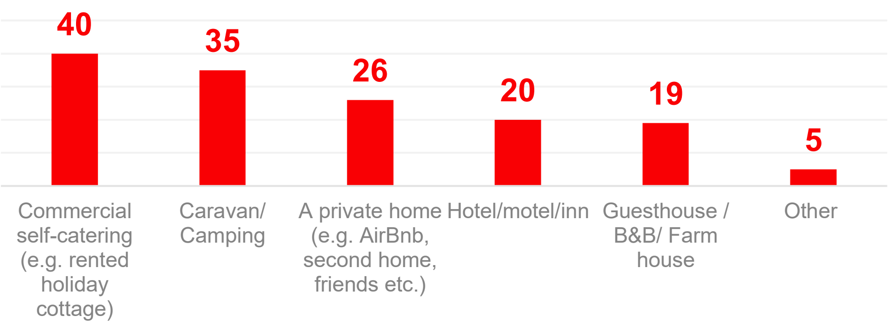
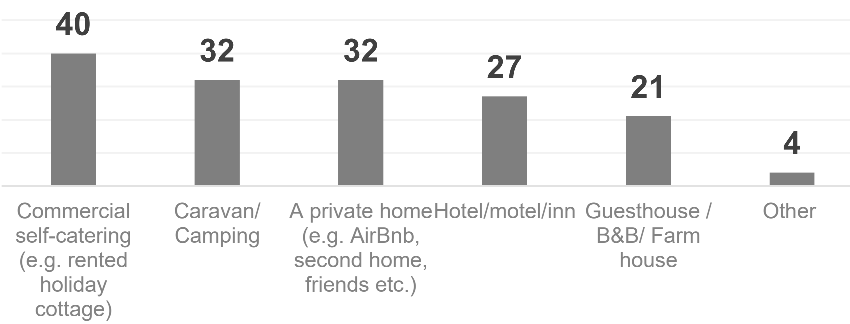


Figure 49. Accommodation planning on staying in on next U.K. overnight trip for Wales <u>winter</u> intenders, Net percentage Weeks 9-13, U.K.



QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive autumn intenders n=118; Wales Exclusive winter intenders n=106

Type of accommodation for next Wales short break or holiday

- In the autumn months, 'static caravan' is the preferred choice among Wales intenders who intend to go camping/caravanning. Campervans/motorhomes have higher intended use for winter trips
- Of the private home accommodation options, 'someone else's home on a commercial basis (e.g. Airbnb)' is the dominant choice in the autumn months, whilst this accommodation type is split relatively evenly with 'friends or relatives home' in the winter.

Figure 50. Type of camping/caravanning accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 9-13, U.K.

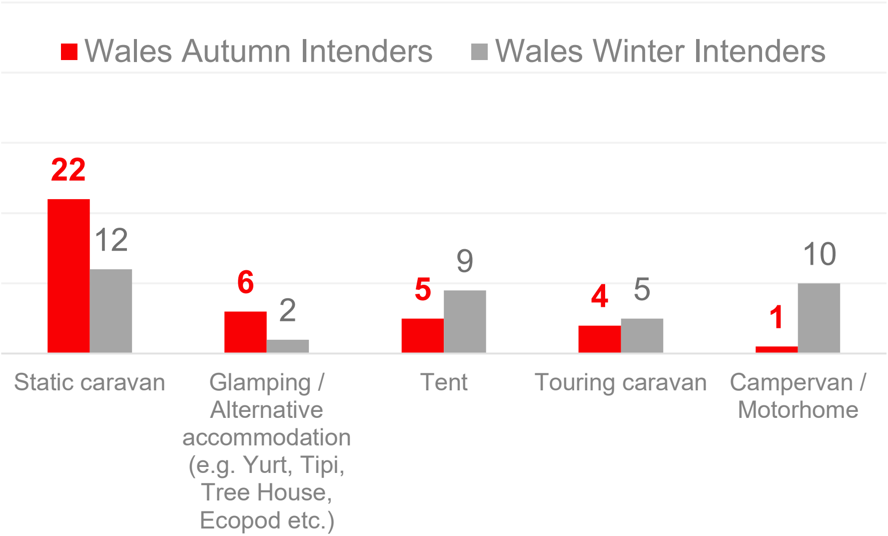
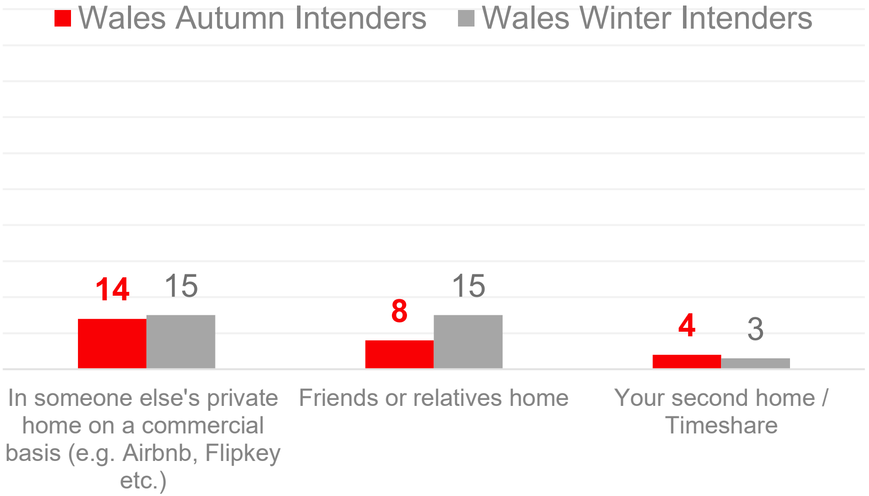


Figure 51. Type of private home accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Weeks 9-13, U.K.



QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive autumn intenders n=118; Wales Exclusive winter intenders n=106

Accommodation preference of Wales intenders – *by destination type*

- Commercial self-catering tends to index higher in Wales' rural destinations, with camping/caravanning, hotel/motel/inns and guest houses/B&Bs more dominant in coastal destinations.

Table 4. Accommodation type by destination type for Wales intenders, Percentage, Weeks 9-13, U.K.

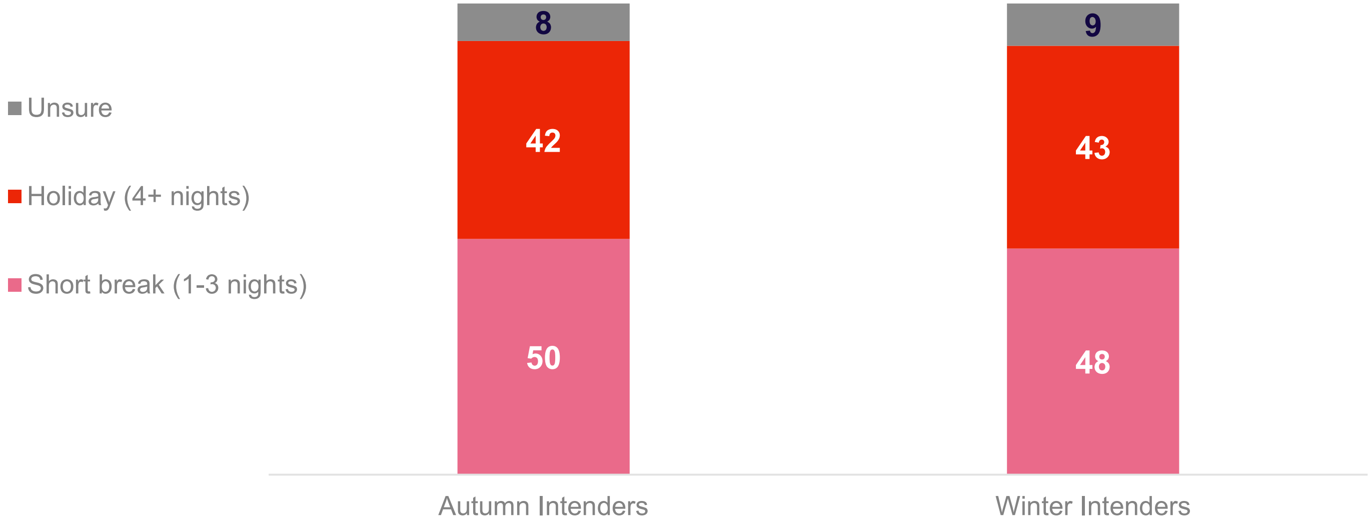
	All Wales Autumn/Winter Intenders	Wales Seaside/ Coastal Destinations	Wales Rural Destinations
Commercial self-catering	40%	34%	47%
Caravan/Camping	33%	42%	29%
A private home	29%	29%	29%
Hotel/ motel/ inn	24%	28%	11%
Guesthouse/ B&B / Farmhouse	20%	23%	16%
Other	5%	6%	5%

QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. 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 U.K. trip? Base: All respondents planning exclusively on taking a holiday or short break in Wales between September 2020 and March 2021. Wales Seaside destinations exclusive (rural coastline + traditional seaside/coastal town) n=81; Wales Rural Destinations (Countryside or village + mountains or hills) n=65; Wales Cities or large towns not shown due to small base sizes

Anticipated length of Wales holidays by time period

- Across both autumn and winter, trips are more likely to be short breaks than holidays. This marks a departure from the summer months where holidays of 4+ nights made up the majority.

Figure 52. Length of next holiday or short break in Wales by time period, Percentage Weeks 9-13, 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 autumn intenders n=118; Wales Exclusive winter intenders n=106

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

- Families make up the highest proportion of intenders for both short breaks and holidays of 4+ nights in Wales
- Retirees index particularly high for holidays of 4+ nights, likely reflecting the higher level of free time.

Figure 53. Life stage breakdown of Wales intenders by trip length, Percentage Weeks 9-13, U.K.

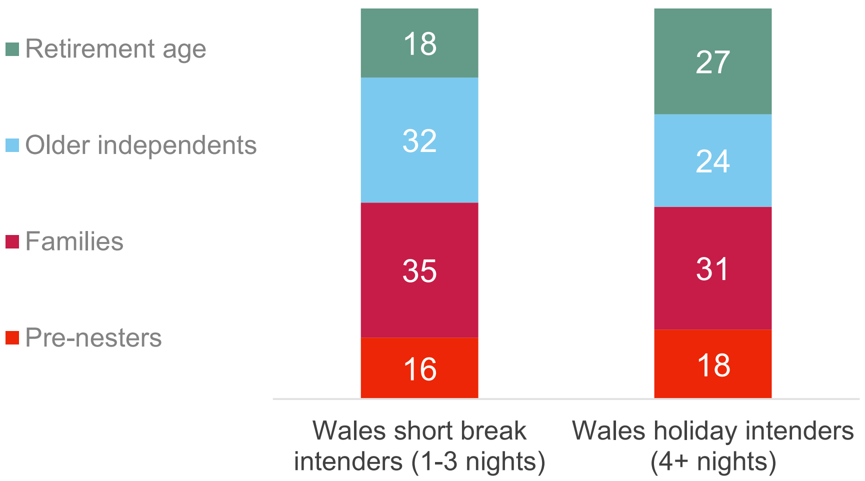
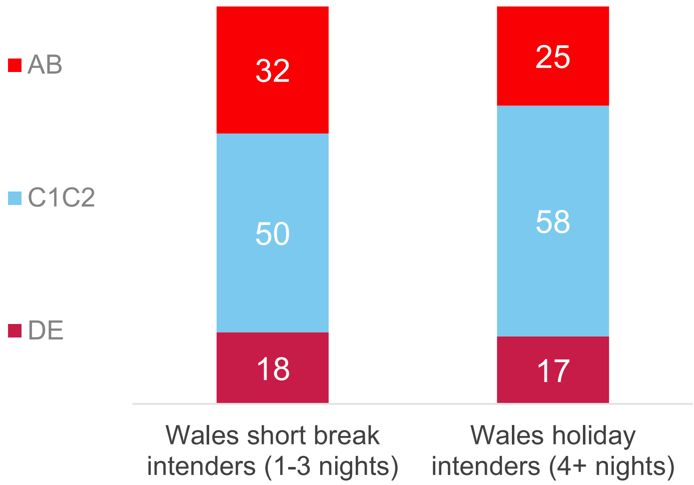


Figure 54. Social grade breakdown of Wales intenders by trip length, Percentage, Weeks 9-13, U.K.

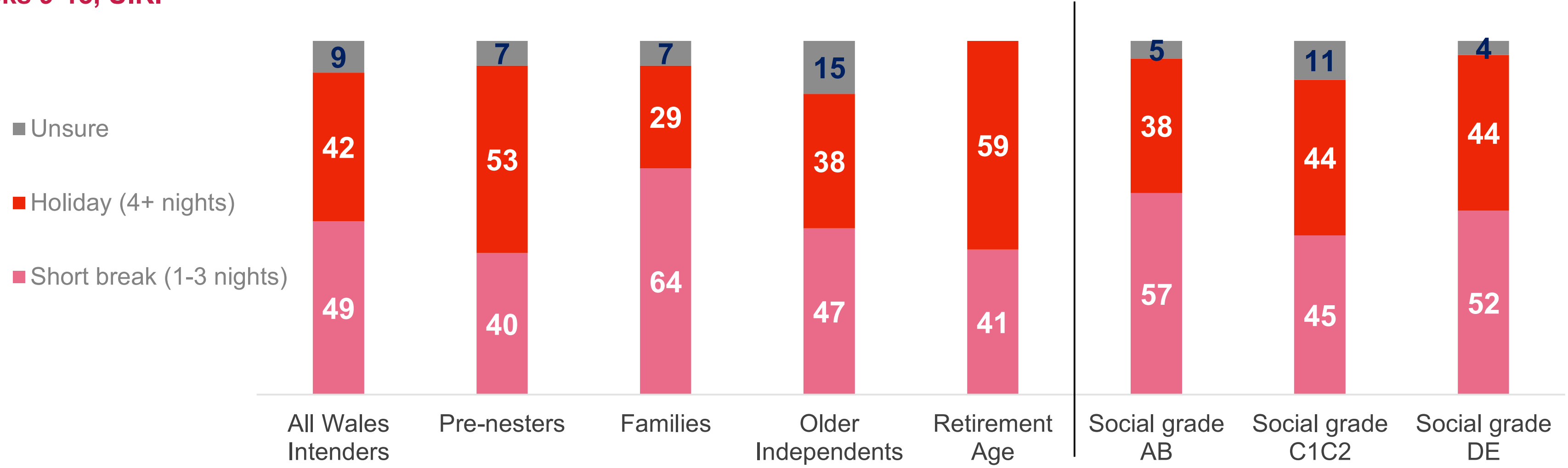


Demographic questions and QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents planning on taking a holiday or short break in Wales between September and March. Short breaks n=170; Holidays n=122

Trip length of intenders

- Retirees are the life stage most likely to visit Wales for a longer holiday of 4+ nights, further highlighting their potential value. Families are most likely to stay in Wales for 1-3 nights, a departure from the summer months where longer school holidays enable longer trips.

Figure 54b. Length of next Wales holiday or short break by life stage and social grade, Percentage Weeks 9-13, U.K.

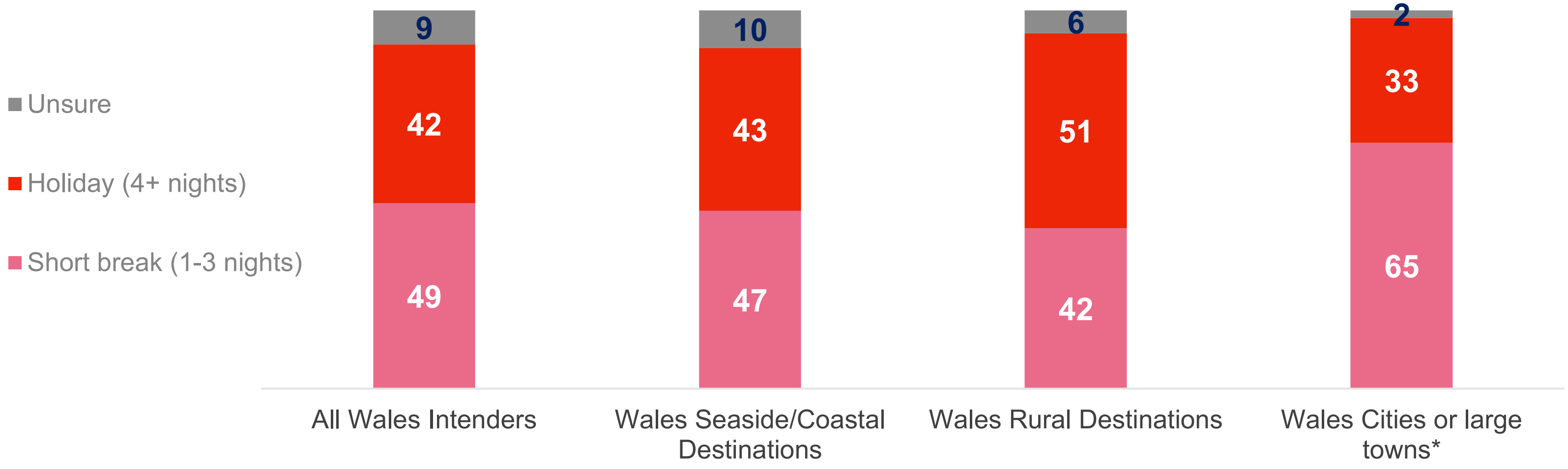


QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? And QVB5 Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning on taking a holiday or short break exclusively in Wales between September 2020 and March 2021 Pre-nesters n=56; Families n=75; Older Independents n=63; Retirement Age n=30. AB n=65, C1C2 n=100, DE n=59

Trip length of intenders – *by destination type*

- Trips to Wales' rural destinations are more likely to be holidays of 4+ nights, possibly driven by a higher incidence of 'retirees'
- Consistent with previous reports, most trips to cities and large towns in Wales during the autumn and winter are intended to be short breaks.
- There is a more even split of short breaks and holidays intended to be taken to seaside and coastal destinations.

Figure 55. Length of next Wales holiday or short break by destination type, Percentage Weeks 9-13, 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 exclusively in Wales between September 2020 and March 2021. Wales Seaside destinations (rural coastline + traditional seaside/coastal town) n=83; Wales Rural Destinations (Countryside or village + mountains or hills) n=66; Wales Cities or large towns n=23* indicative only

Anticipated spend on next Wales holiday or short break

- Wales intenders expect to spend more in winter than in autumn for their holiday or short break, reflecting the more challenging financial circumstances of September intenders compared to other periods and possibly the higher intended use of caravan and camping in autumn and Serviced accommodation in the winter.
- Anticipated average spend in Wales is significantly lower than in the U.K. overall (With over half of both autumn and winter intenders likely to spend under £500 on their trip, Wales appears to be regarded as a good value destination.

Figure 56. Anticipated spend for Wales autumn and winter intenders , Percentage Weeks 9-13, U.K.

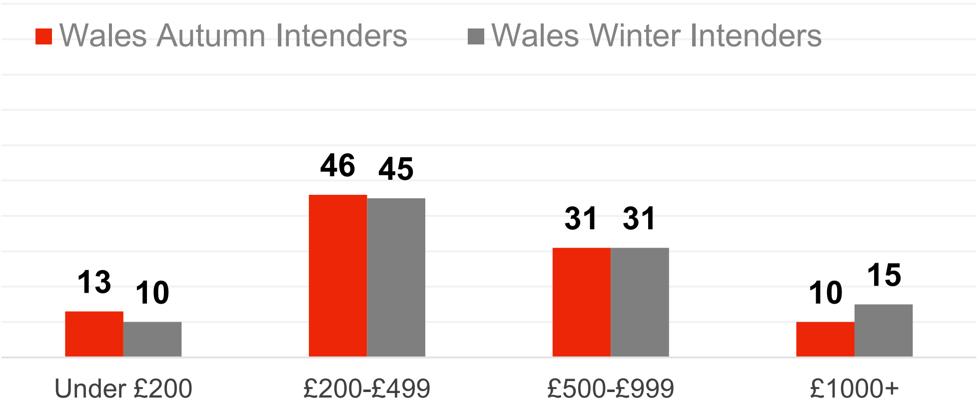
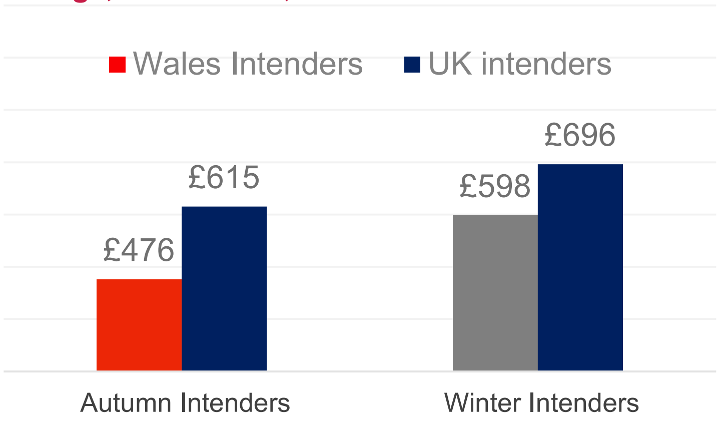


Figure 57. Anticipated average spend for Wales autumn and winter intenders, Average, Weeks 9-13, U.K.

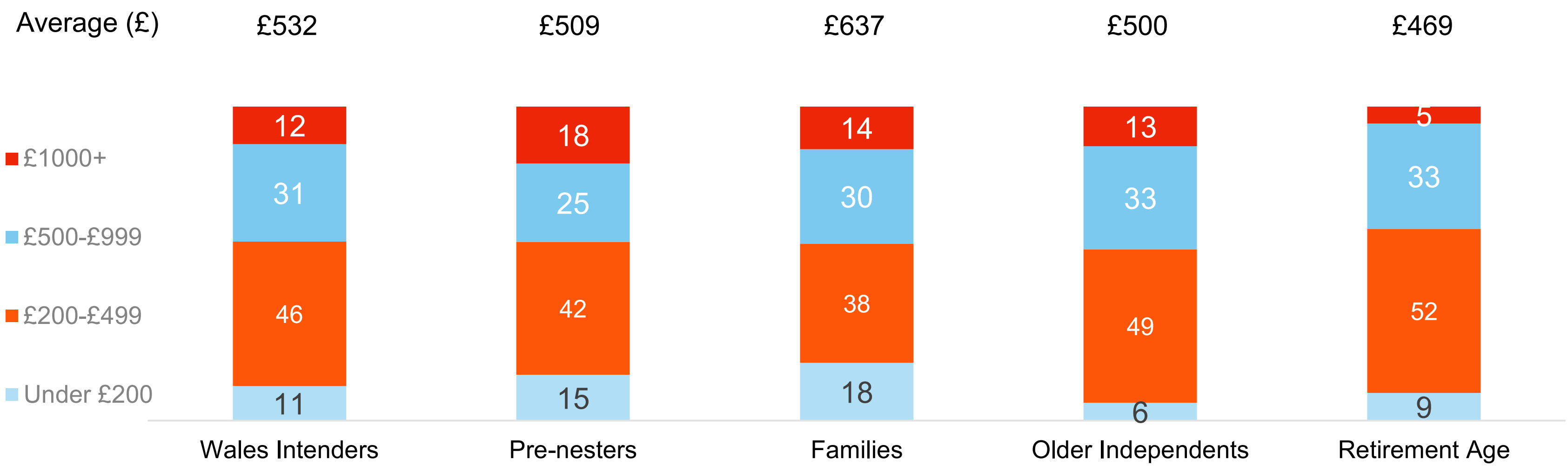


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break in the U.K. and Wales from September 2020 to March 2021 All Wales Exclusive autumn intenders n=110, All Wales Exclusive Winter Intenders n=93

Anticipated spend for Wales intenders *by life stage**

- Families are likely to generate the highest spend on their trip to Wales, followed by Pre-nesters.
- 'Retirees' are likely to generate the lowest spend, reflecting their overlap with DE social grades.

Figure 58. Anticipated trip spend for Wales intenders by life stage, Average, Percentage Weeks 9-13, U.K.

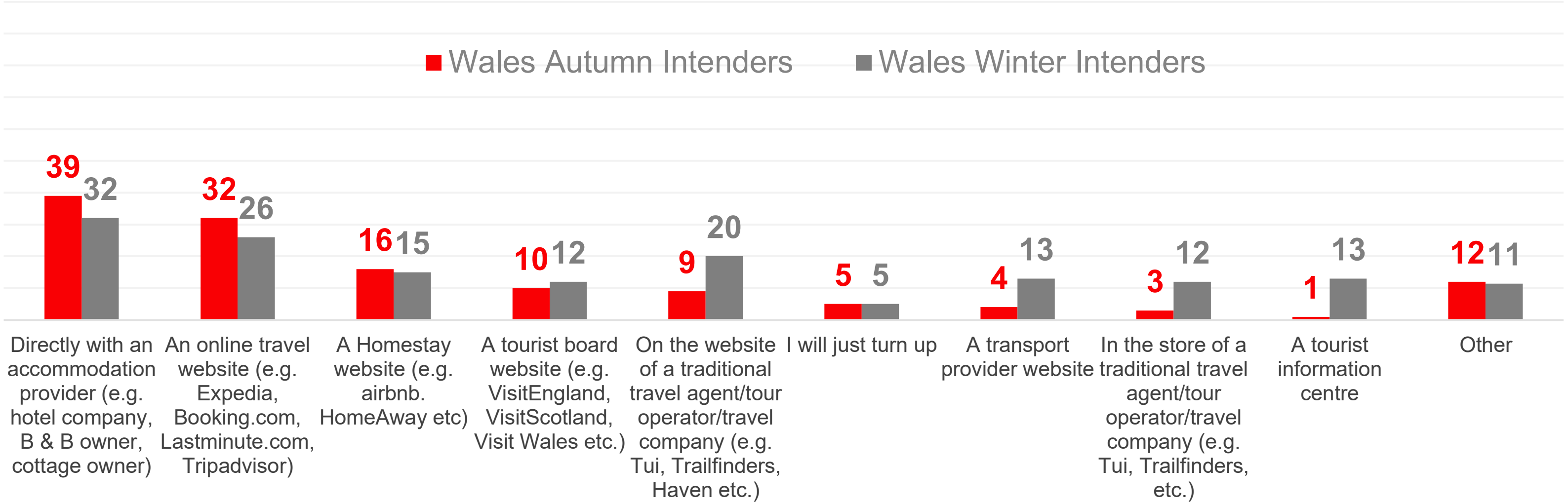


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break exclusively in Wales between September and March. Wales Intenders n=203; Pre-nesters n=47*, Families n=66*; Older independents n=60*, Retirement Age n=30* *Note very small base sizes, please treat indicatively

Preferred booking channel for next Wales short break or holiday

- Winter and autumn 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'. This is a similar pattern to summer holidays in Wales.
- Winter intenders are more likely to be considering using other third party channels to book their accommodation.

Figure 59. Accommodation booking channel for Wales autumn intenders, Net percentage Weeks 9-13, U.K.

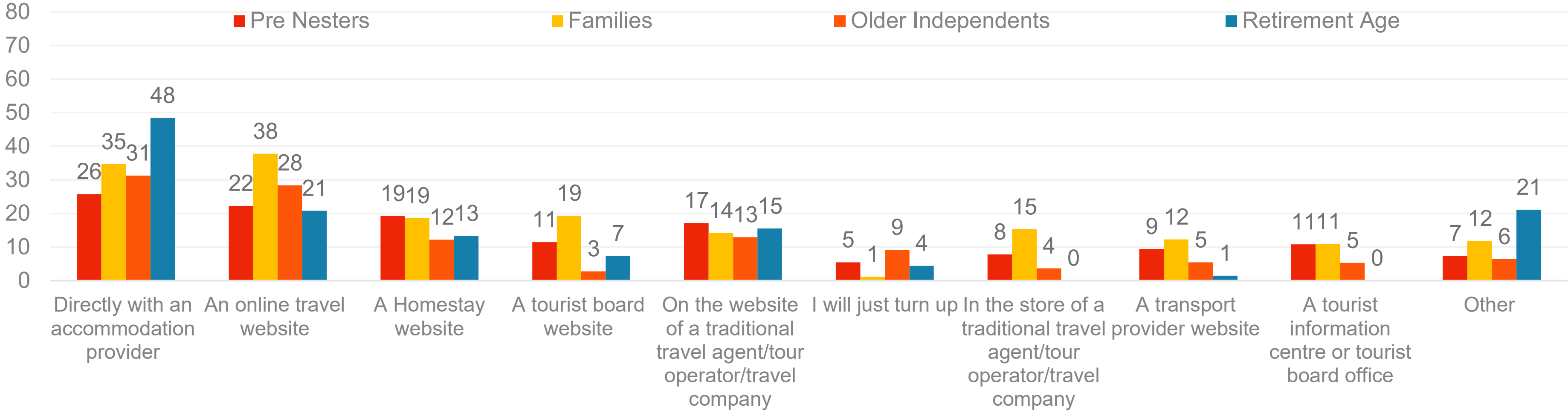


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All respondents planning on taking a holiday or short break in Wales. Wales Inclusive autumn intenders n=159; Wales Inclusive winter intenders n=157

Breakdown of booking channel for trip to Wales by life stage

- Booking channels have varying intended use amongst life stages.
- Retirees are the most likely to book directly with the accommodation.
- Older independents are also most likely to book directly, but reflecting the range of ages within this life stage also book across other channels.
- Pre-nesters are the least likely to book direct with the accommodation provider.
- Families are most likely to be intending to book with online travel websites, but also a high proportion intend to book direct.

Figure 60. Life stage breakdown of intenders booking channel, Percentage Weeks 9-13, 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 between September and March Pre-nesters n=73; Families n=117; Older Independents n=80; Retirees n=46

Main mode of transport for next Wales short break or holiday

- Across both autumn and winter trips, ‘own car’ is by far the leading mode of transport intended to be used on trips to Wales, followed by train.
- Wales intenders are slightly more likely to use a private coach/bus for winter trips

Figure 61. Top 5 main modes of travel of destination for trip in autumn Percentage Weeks 9-13, U.K.

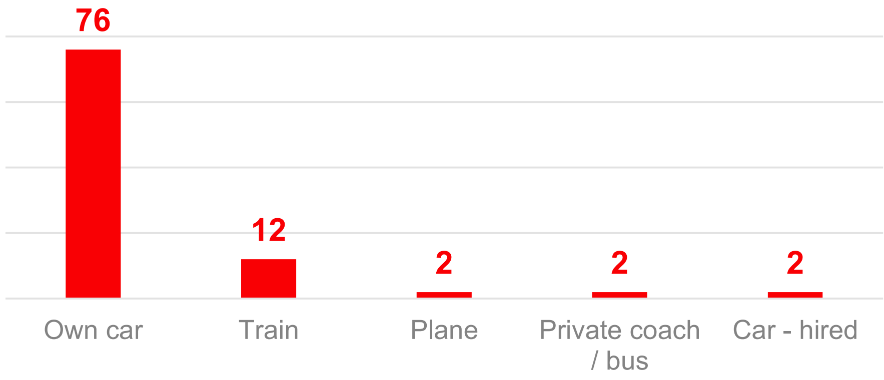
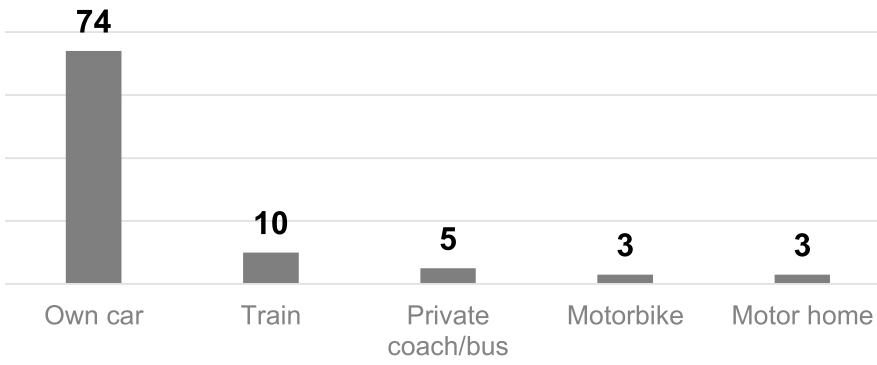


Figure 62. Top 5 main modes of travel of destination for trip in winter Percentage Weeks 9-13, U.K.



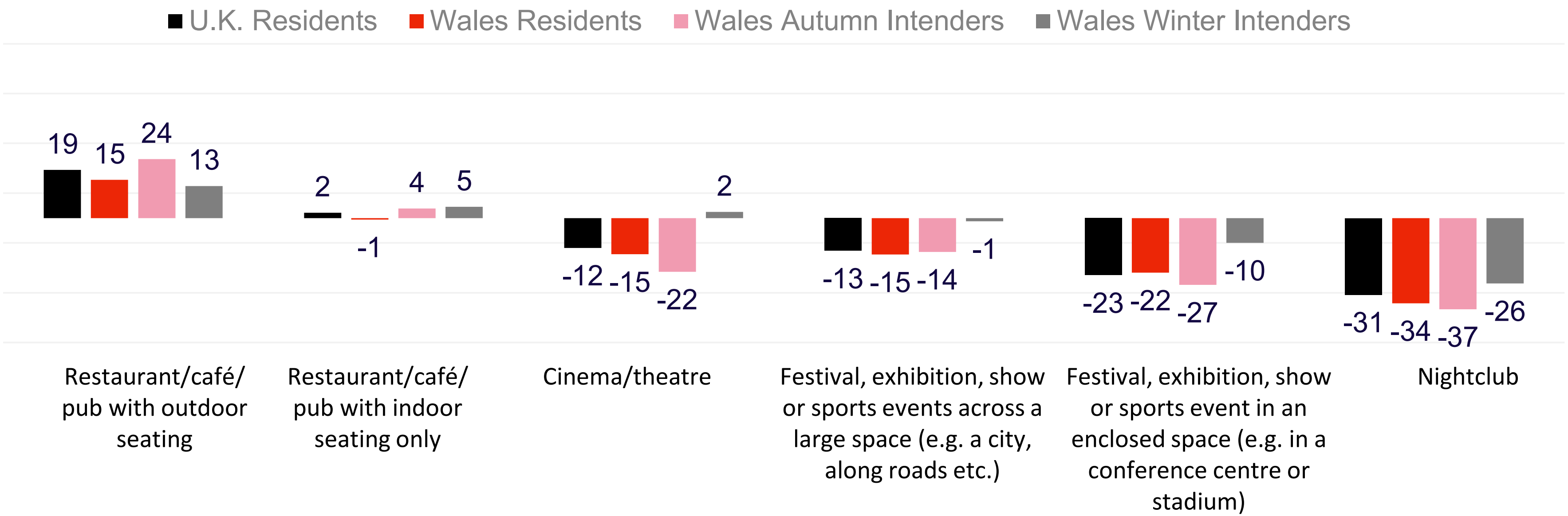
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive autumn intenders n=118; Wales Exclusive winter intenders n=106

Activity engagement post lockdown

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (intended visitors and residents) anticipate engaging in more visits to restaurants/cafes or pubs with outside seating now lockdown restrictions are lifted.
- In contrast to previous weeks, UK. residents and Wales visitors are now marginally more likely to visit restaurants/cafes or pubs with indoor seating only.
- Wales residents and intended visitors remain less likely than normal to visit festivals, events, nightclubs, and cinema and theatre.

Figure 63. 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 9-13, U.K. and Wales

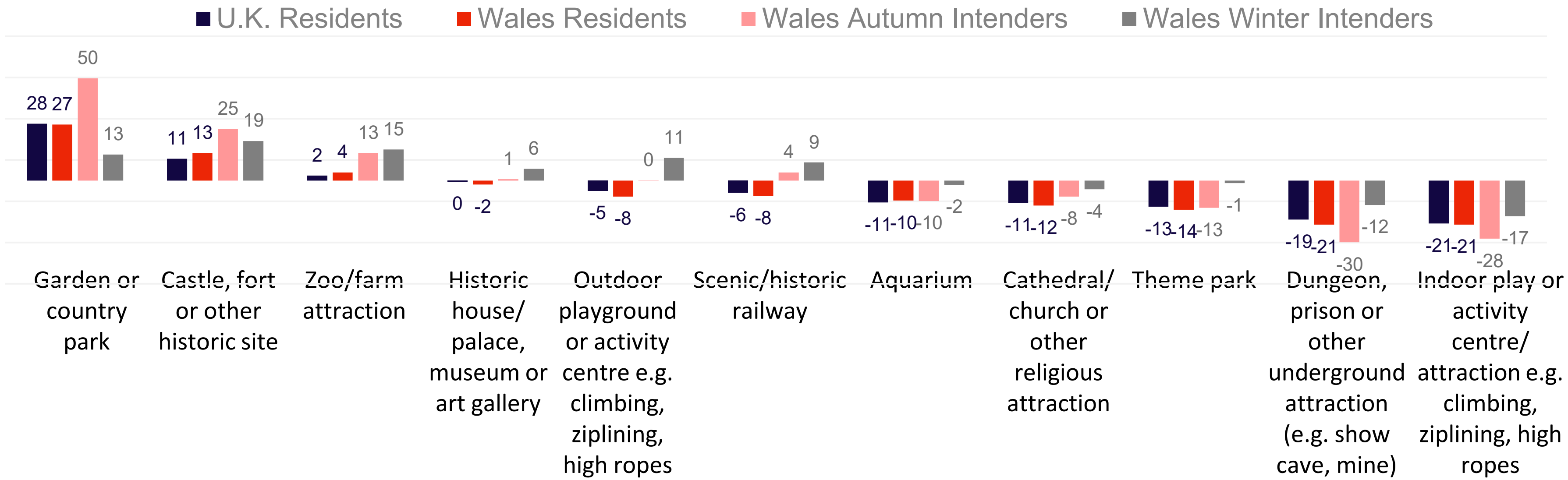


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=8932; Wales population n=1,064; Wales autumn intenders Inclusive n=159; Wales winter intenders Inclusive n=157

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (intended visitors and residents) continue to anticipate more visits to outdoor attractions such as gardens, castles and zoos/farms now restrictions are lifted. There remains 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. theme parks or indoor play or activity centres)
- People intending to visit Wales in the autumn and winter are expecting to visit historic attractions, animal attractions and scenic railways more than normal, providing an opportunity to encourage visits these as part of their holiday trips to Wales in autumn and winter.

Figure 64. Visitor attractions more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 9-13, U.K. and Wales

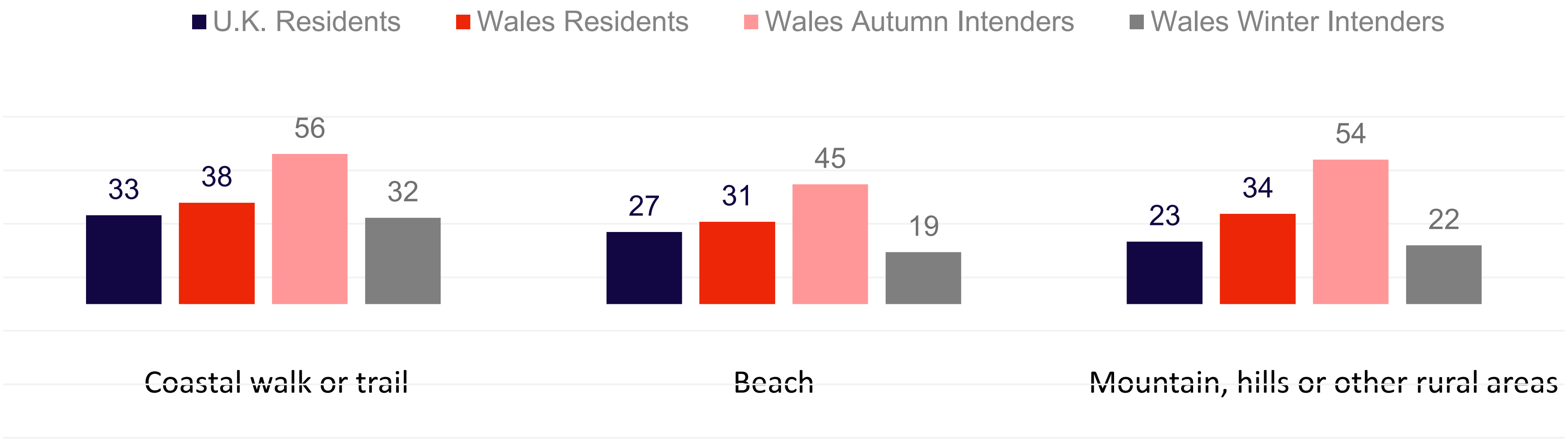


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=8947; Wales population n=1,066; Wales autumn intenders Inclusive n=159; Wales winter intenders Inclusive n=157

General leisure activity intentions as lockdown restrictions are lifted

- All audiences (intended 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 autumn are more likely to be planning to visit these types of outdoor location.

Figure 65. Outdoor areas more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 9-13, U.K. and Wales

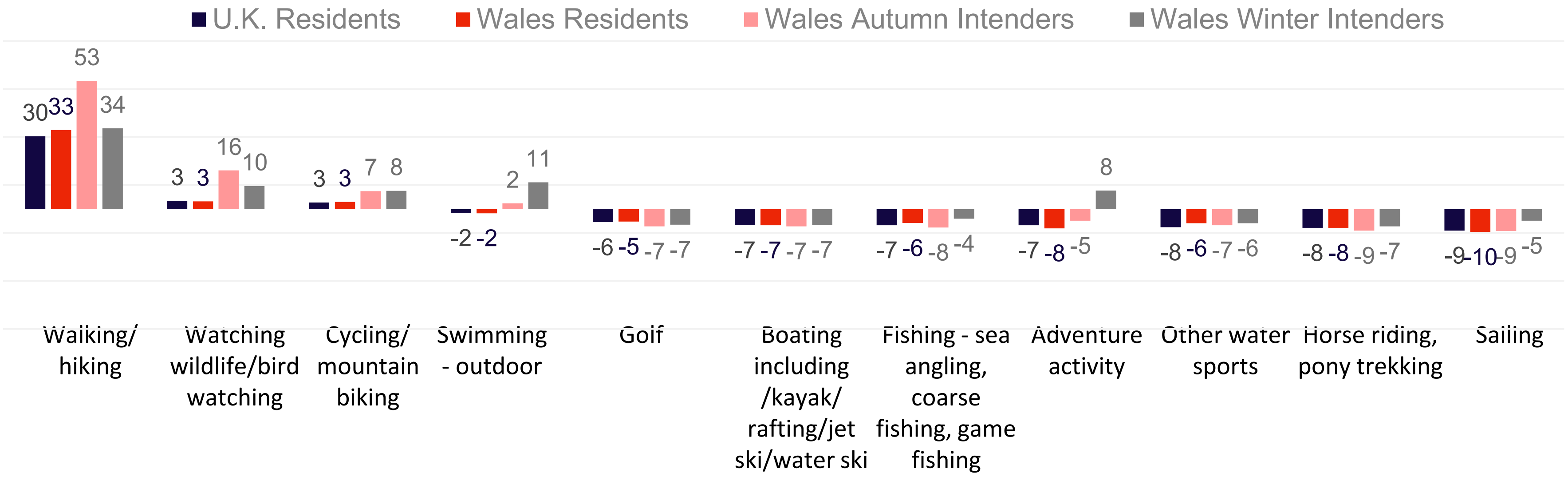


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=8947; Wales population n=1,066; Wales autumn intenders Inclusive n=159; Wales winter intenders Inclusive n=157

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 autumn and winter intenders are marginally more likely to go swimming outdoors and undertake adventure activities.

Figure 66. Outdoor activities more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Weeks 9-13, U.K. and Wales

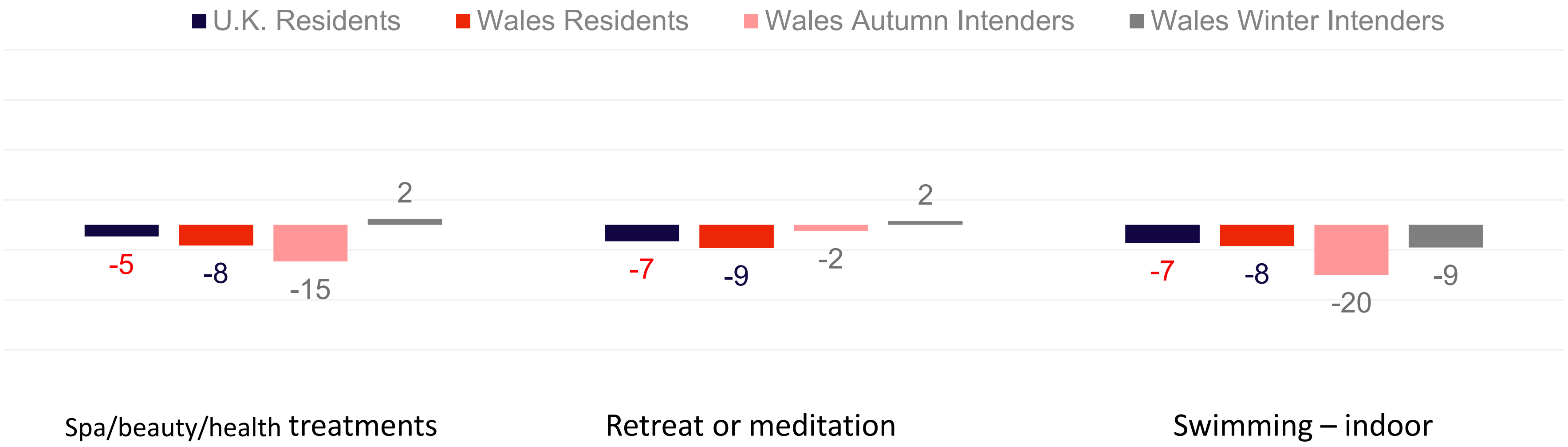


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All respondents. U.K. population n=8947; Wales population n=1,066; Wales autumn intenders Inclusive n=159; Wales winter intenders Inclusive n=157

General leisure activity intentions as lockdown restrictions are lifted

- In general, both visitors and residents currently indicate lower than normal expectation to undertake indoor swimming or health and beauty treatments as restrictions are lifted, reflecting continued anxiety around close personal contact and indoor environments.
- Wales winter intenders indicate a net higher intention to undertake ‘spa/beauty/health treatments’ and retreats or meditation, an opportunity to promote if restrictions and comfort levels continue to ease.

Figure 67. Indoor health and wellness more or less likely to visit as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 9-13, 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=8947; Wales population n=1,066; Wales autumn intenders Inclusive n=159; Wales winter intenders Inclusive n=157

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 9-13 of the COVID-19 consumer weekly tracker.