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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2020 (Waves 14-16)

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Mae’r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Available at: https://gov.wales/covid-19-uk-tourism-consumer-tracker-survey-wales-profile

For further information please contact:

Research and Insights Team
Visit Wales,
Economy, Skills and Natural Resources Group
Cathays Park
Cardiff
CF10 3NQ

Email: tourismresearch@gov.wales

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 weekly or fortnightly with the first week commencing 18th May

The findings in this report are based on data from Waves 14-16. This is based on fieldwork taking place during the following dates:

- **Wave 14: 31 August – 4 September**
- **Wave 15: 14-18 September**
- **Wave 16: 28 September - 2 October**

For ease of reference, these waves are referred to as ‘early September’, ‘mid-September’ and ‘early October’.

Definitions used within this report (1)

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

Definitions used include:

- **All U.K. intenders (Oct-Mar):** Members of the public who state their next U.K. holiday or short break will be between October 2020 and March 2021
- **All Wales intenders (Oct-Mar):** Members of the public who state their next U.K. holiday or short break will be in Wales between October 2020 and March 2021.

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+.

In an attempt to understand the impact of lockdown on trip-taking, we have created two geographical groups. For ease of analysis, these are based solely on regions within England.

- **Lockdown areas in England:** North West, North East and West Midlands
- **Non-lockdown areas in England:** All other areas

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

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:

- **COVID impacted:** Anxious about the virus and the health implication, 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. They are also suffering financially. Concerns about catching the virus' is the biggest barrier to taking a U.K. holiday or short break.
- **COVID cautious:** Less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own behaviour and index higher on not travelling because it is not responsible to do so
- **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)

The national mood and behavioural sentiment

1. The U.K. national mood remains relatively consistent with recent reporting periods, around 6 in 10 rating their personal mood as at least 7 out of 10. Despite higher levels of concern around the pandemic, ‘retirees’ exhibit the most positive mood.
2. Perceptions that ‘the worst is still to come’ in relation to the pandemic have increased significantly in recent weeks – 41% thinking this in early September, but 58% thinking it as of early October. Those of retirement age are most likely to think this although the increase has been seen across all life stages.
3. Residents of Wales report a lower mood than residents of the wider U.K., and are more likely to anticipate that things are going to get worse. They are also more likely than U.K. residents to fall into the COVID Cautious segment.
4. An increasing sense that things are getting worse, is supported by lower comfort levels doing everyday activities, in particular using public transport. The vast majority of activities that people plan on doing more of in the coming months, continue to be based outdoors – eating at a restaurant indoors is one exception to this, although the net increase is likely to be marginal. Wales residents show particularly high intentions to undertake outdoor activities compared to residents of the U.K.
5. Confidence in the ability to take a UK holiday or short break in the next six months is low, and has declined significantly since mid September when new restrictions became more wide spread. Confidence is lowest amongst retirees, older independents, risk-averse segments and Wales residents. The confidence of the Life Goes On segment remains high suggesting that this segment is the most likely to take their holiday.

Key findings (2)

Upcoming trip intentions

1. 20% of the U.K. population (10.8 million adults) and 15% of Welsh residents anticipate taking a domestic short break or holiday by the end of the year (with 2 trips planned on average). Intention to take a trip has dropped significantly amongst Wales residents - 26% planned on taking a trip in early September, but this fell to 15% as of early October.
2. 27% of U.K. adults plan on taking an overnight trip between October and March, of whom 8% plan on visiting Wales. Notably, the proportion that plan to visit Wales has dropped since early September, along with other areas with increased restrictions such as the North East England.
3. Intention to take an overnight domestic trip between October and March is highest amongst ‘pre-nesters’ and ‘families’ whilst older age groups and more risk-averse segments are less likely to intend to take a trip in this time period.
4. People intending to visit Wales between October to March 2021 are more likely than the U.K. population to be ‘pre-nesters’ and belonging to social grades AB.
5. Nearly 2 in 5 of Wales residents planning on an October to March overnight trip are planning to take this trip in Wales. However, the vast majority of people intending to visit Wales (83%) live outside Wales.
6. Residents from the West Midlands and the North West are the most likely to intend to visit Wales, although local lockdown restrictions in these areas may put these visits into doubt.
7. The vast majority of overnight trips to Wales between October and March are likely to be for a ‘holiday’, the majority of these are likely to be short breaks.
8. Visitors to Wales are most likely to stay in the ‘countryside or a village’, followed by a ‘traditional coastal/seaside town’ and ‘rural coastline’, fewer visitors intend to stay in a city or large town in Wales compared to the UK as a whole.
9. Hotel is the most likely accommodation choice for Wales intenders, followed by guesthouse/B&B, commercial self-catering and caravan/camping. Increased restrictions in September appear to have had some impact on accommodation choice – ‘guesthouses/B&Bs’ and ‘private home’ have decreased in incidence, whilst ‘commercial self-catering’ have increased.

Key findings (3)

Trips taken since July

1. As of early October, 30% of U.K. adults (c.16.2 million) had taken an overnight short break or holiday in the U.K since restrictions were lifted in early July – compared to 24% of Wales adults. Both numbers are significantly higher than intended trips before restrictions were lifted.
2. The higher incidence of trips taken is driven by 'VFR' (visits to friends and relatives), although Wales visitors are less likely to fall into this category.
3. Families have made up around 2 in 5 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 who index significantly lower than the population.
4. Visitors to Wales include all socio economic groups, but C1C2s have higher representation compared to the wider population
5. 20% of all overnight visitors to Wales since July lived in Wales, with around half living in the North West of England, the West Midlands or the South West of England.

Day trips in October half-term

1. 14% of U.K. residents and 12% of Wales residents anticipate taking a day-trip in the October half-term, rising to 22% amongst Wales-based families, and dropping to 6% for Wales-based older independents and 4% for Wales-based retirees.
2. Of those planning on taking a day trip in October half-term, there is an anticipation that they will take fewer day trips than 'normal'. This is particularly the case for Wales residents. Nearly half (49%) of family day-trippers intend to take fewer day trips, although 1 in 4 (23%) plan on taking more.

Key findings (4)

Business trips

1. 12% of U.K. adults in employment intend to take an overnight business trip by March 2021, compared to 7% of working adults living in Wales. Meetings of 1-5 people are the main reason for U.K. residents taking a business trip, larger meetings the next most prevalent reason.
2. U.K. adults planning an overnight business trip anticipate fewer trips compared to normal between now and the end of the year. Notably, those in 'higher managerial' roles anticipate taking almost as many overnight business trips as normal.
3. 'Postponement' is the main reason that there is a perception of taking fewer overnight business trips, 45% saying this, with cancellation a reason for 28%. Nearly 2 in 5 are *choosing* to take fewer trips, due to concerns around COVID-19. Notably 1 in 5 have switched to digital alternatives.

National sentiment

The national mood

- Over half of both the U.K. (58%) and Wales (55%) population rate their current mood as at least a 7 out of 10, Wales residents scoring marginally lower. There is limited evidence of the national mood declining between early September and October, as increased restrictions have been put in place.

Figure 1. Current mood out of 10, Percentage, Waves 14-16, U.K. and Wales

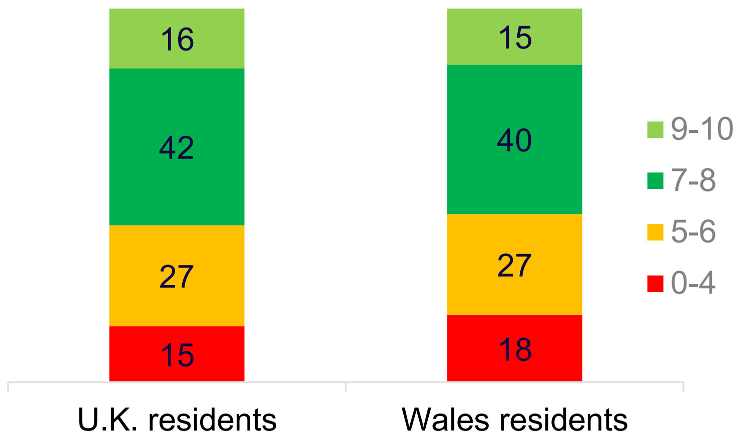
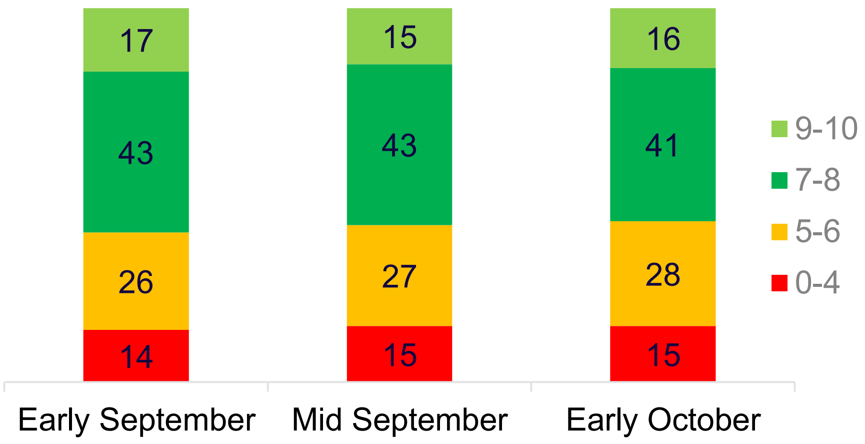


Figure 2. Current mood out of 10, Percentage wave-on-wave, U.K.



Q5: How would you rate, between 0 and 10, your mood today? Base: All U.K. respondents. n=5,260; All Wales respondents n=596; Early September n= 1,762; Mid September n=1756; Early October n= 1,742

Perceptions of the situation in relation to COVID-19

- Over half (55%) of Wales residents think that ‘the worst is still to come’ in relation to COVID-19, higher than the 52% thinking this across the U.K. There was a significant shift in perceptions in mid-September, the proportion of the U.K. public thinking the worst is still to come rising from 41% to 58%. This shift in perceptions is also evident amongst Wales residents.

Figure 3. Perception of the situation with regards to COVID-19, Waves 14-16, U.K. and Wales

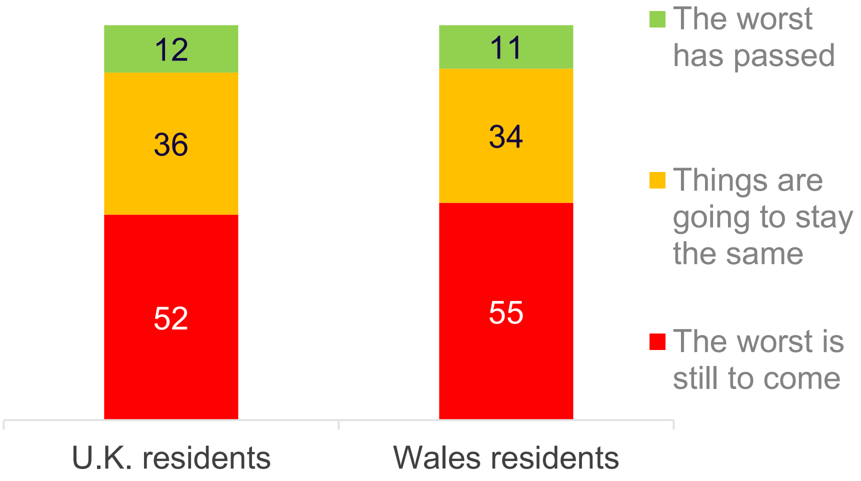
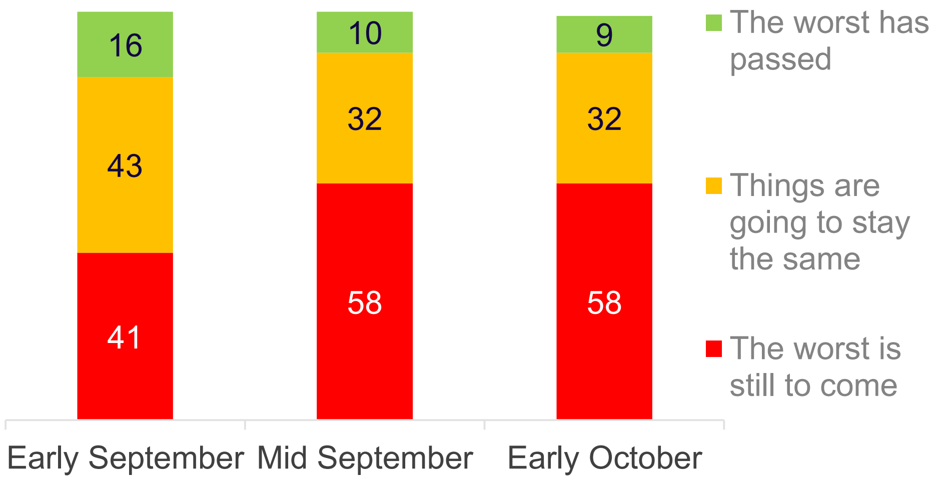


Figure 4. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, U.K.



Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All U.K. respondents. n=5,260; All Wales respondents n=596; Early September n= 1,762; Mid September n=1756; Early October n= 1,742

The national mood and perceptions of the situation in relation to COVID-19

- Perceptions that ‘the worst is still to come’ are high across all life stages, although highest amongst ‘retirement age’ and ‘older independents’. Conversely, however, ‘retirees’ exhibit the highest mood score, younger life stages tending to have the lowest mood. U.K. adults living in England’s ‘lockdown areas’ index higher on perceptions that the worst is still to come *and* on lower mood.

Figure 5. Current mood out of 10 by sub-group, Percentage, Waves 14-16, U.K.

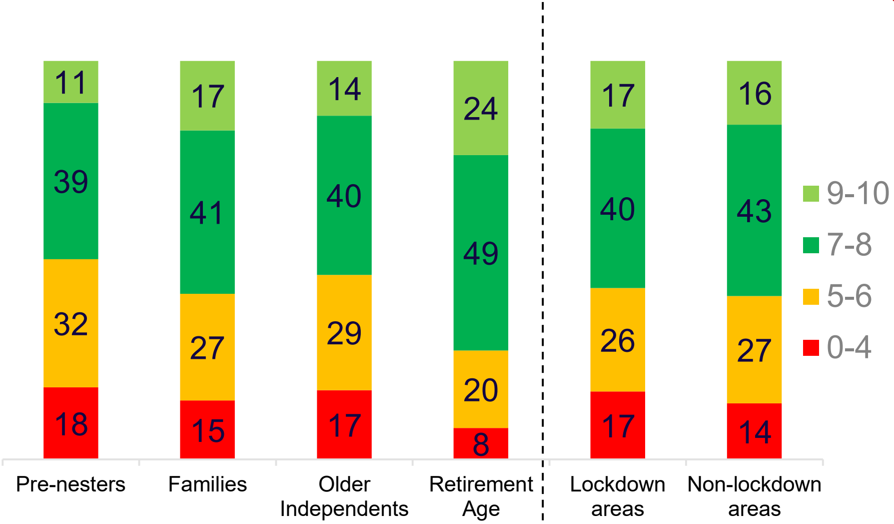
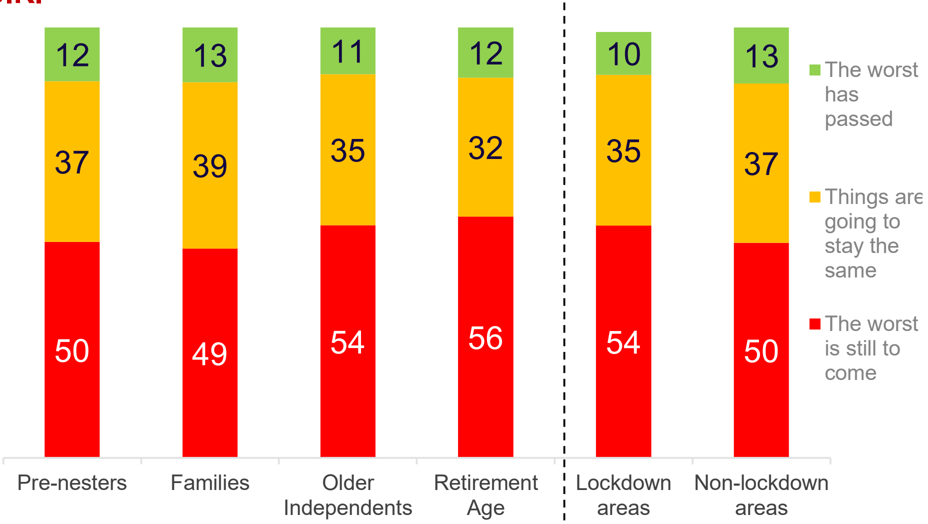


Figure 6. Perception of the situation with regards to COVID-19 by sub-group, Percentage Waves 14-16, U.K.



Q5: How would you rate, between 0 and 10, your mood today? Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion? Base: pre-nesters n=1149; Families n=1581; Older Independents n=1645; retirement age n=885; Lockdown areas in England (North West, North East and West Midlands) n= 1,148; Non-lockdown areas in England (all other areas) n=2,657

Financial segments and financial impact of COVID-19

- 15% of both the Wales population and the wider U.K. population regard themselves as having been 'hit hard' financially by COVID-19, with a further 2 in 5 'ok but having to be careful'. Just over a third have not been affected and around 1 in 10 are better off than before. These figures have remained relatively consistent since August (when the last report was published).
- Around 1 in 9 of the population are on furlough, a number that has declined since August – other employment figures remain consistent.

Figure 7. Breakdown of residents by financial segments, Percentage Waves 14-16, U.K. and Wales

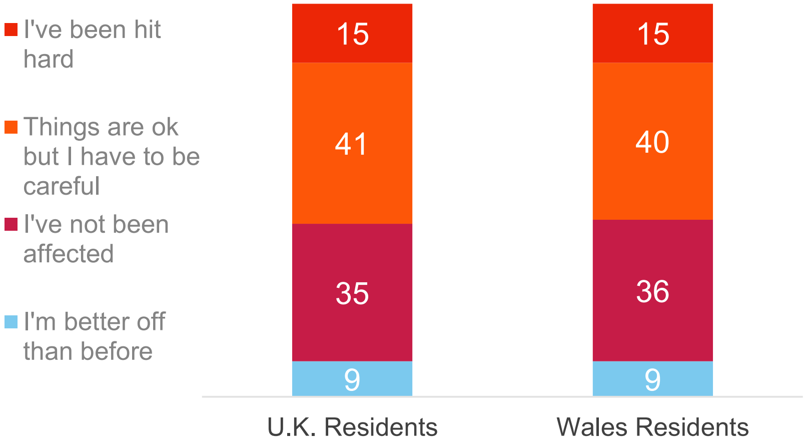
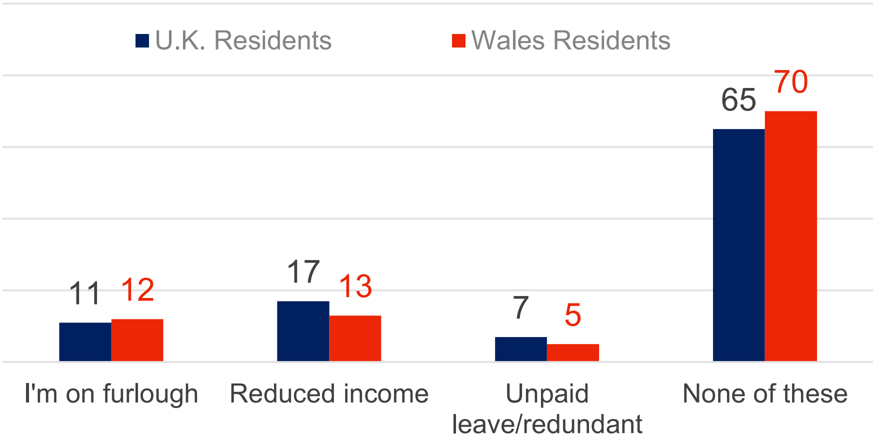


Figure 8. Employment impact on residents, Percentage Waves 14-16, U.K. and Wales

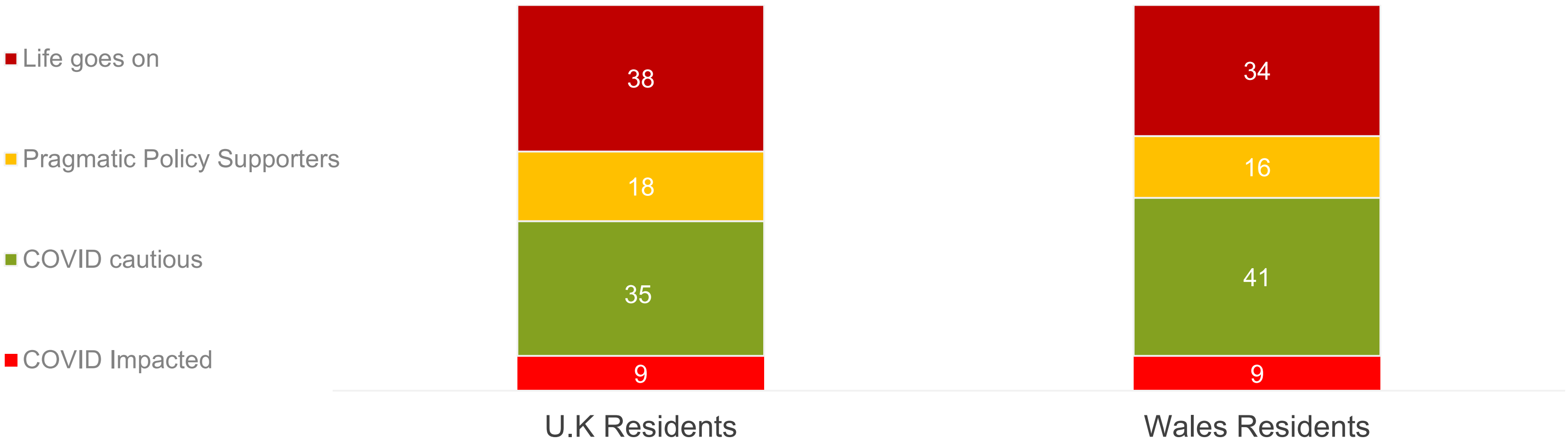


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Attitudinal segments by residents(see definitions page for more information)

- The 'life goes on' risk segment makes up 38% of the U.K. population and 34% of the Wales population. Wales residents are significantly more likely to belong to 'COVID cautious' than the U.K. population on the whole.

Figure 8b. Breakdown of intenders by risk segments, Percentage Waves 14-16, U.K. and Wales

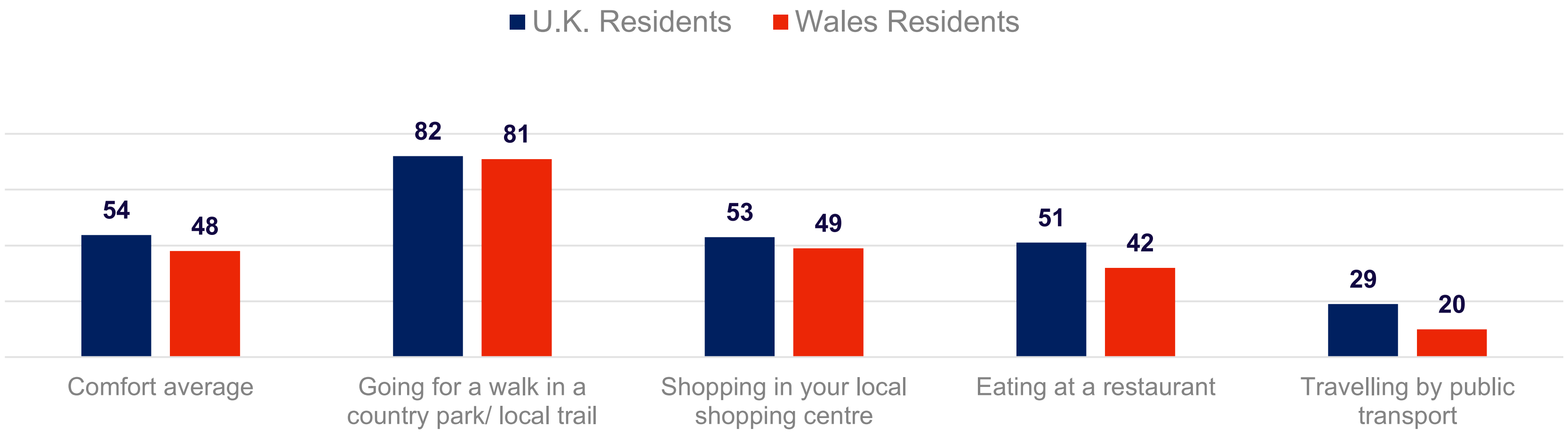


Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Level of comfort undertaking activities with a ‘comfort average’

- The pattern of comfort with doing everyday activities remains consistent with previous reports – ‘going for a walk’ generating the highest comfort levels, ‘travelling by public transport’ the lowest.
- Welsh residents report lower levels of comfort across activities especially eating at a restaurant and travelling by public transport.
- Notably, after consistent increases since the national lockdown was lifted in July, this report is the first time the average comfort score has declined (in August the average comfort score was 56% for the U.K. and 53% for Wales).

Figure 9. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Percent, Waves 14 to 16, U.K. and Wales

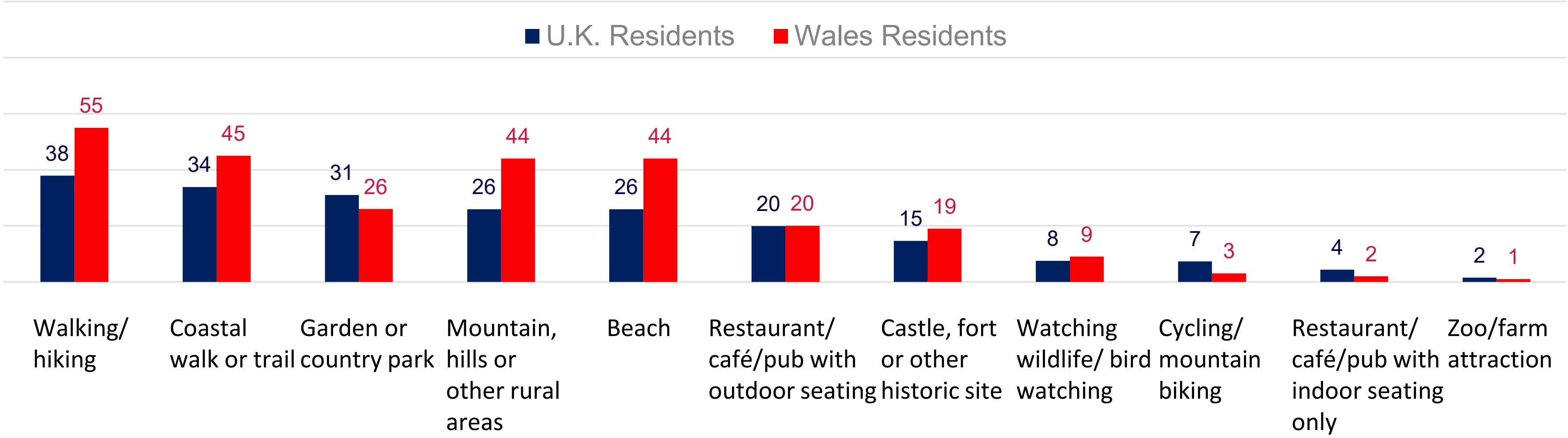


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Leisure activities with anticipated net increase in behaviour

- Tying in with comfort levels being highest for ‘going for a walk in a country park or a local trail’, activities with an outdoor element make up the vast majority of net increase in anticipated behaviour. Outdoor rural areas index particularly high amongst Wales residents. The one exception is ‘eating in restaurants with indoor seating only’, which is likely to experience a marginal increase in activity.

Figure 10. Activities/places with an anticipated net increase in behaviour/visits in next few months, Net: ‘more likely’ minus ‘less likely’, Waves 14-16, U.K. and Wales

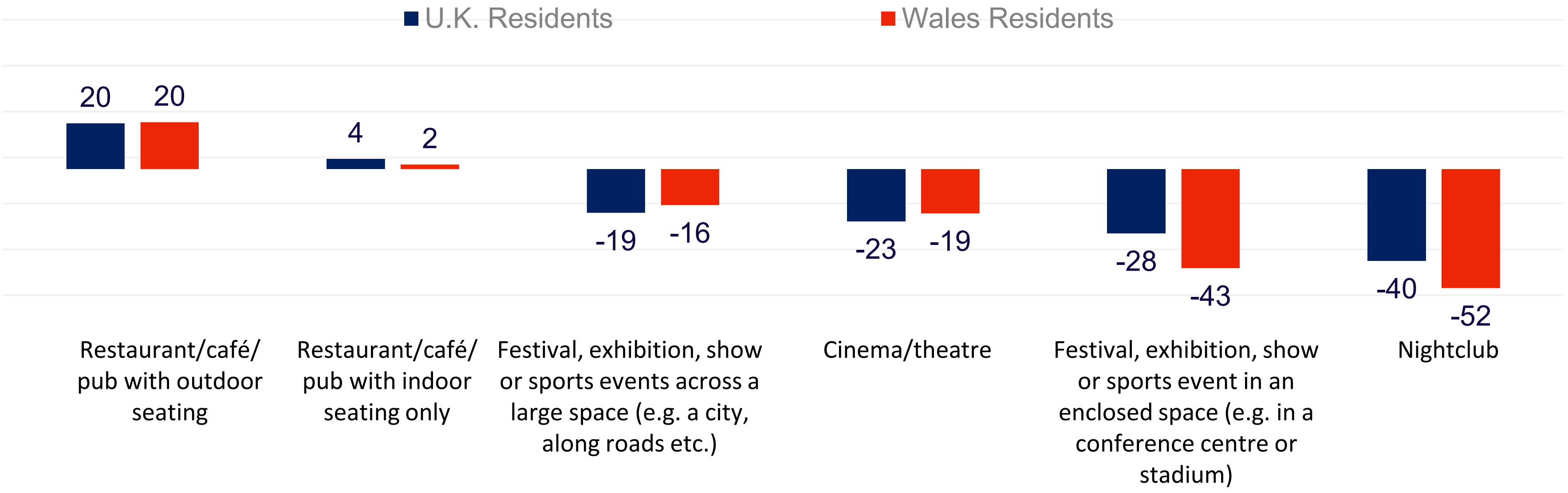


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By ‘normal’ we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Anticipated activity compared to ‘normal’ in next few months

- Both U.K. and Wales adults anticipate visiting restaurants with outdoor seating significantly more than normal in the next few months; restaurants with indoor seating *marginally* more than normal. Other entertainment and events activities – including visiting festivals, cinemas/theatres and nightclubs are likely to continue to generate fewer visits, especially by Welsh residents.

Figure 11. Entertainment and events venues and activities more or less likely to visit/do compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 14-16, U.K. and Wales

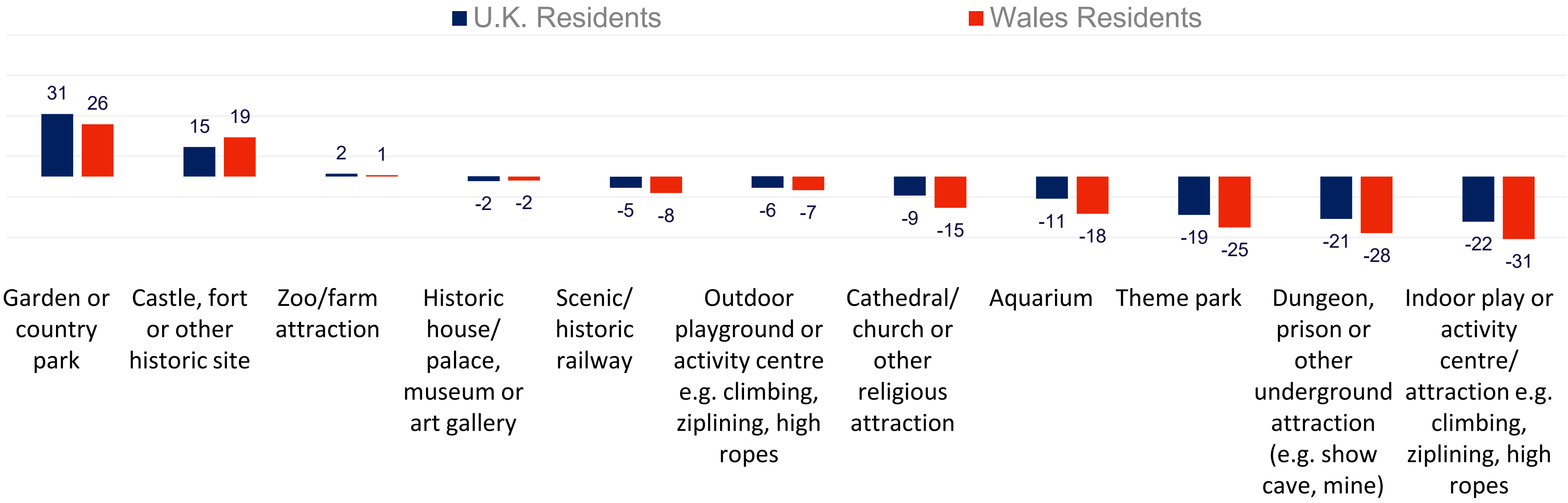


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By ‘normal’ we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Anticipated activity compared to 'normal' in next few months

- Consistent with previous reporting, 'gardens or country parks' and 'castles/forts or other historic sites' are likely to generate a net increase in activity compared to normal in the next few months. The majority of other attraction types are likely to attract fewer visits, in particular those that are more enclosed and hands-on such as 'dungeons' and 'indoor play centres'. Expectations to visit indoor attractions are lower amongst Welsh residents.

Figure 12. Visitor attractions more or less likely to visit compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Wales

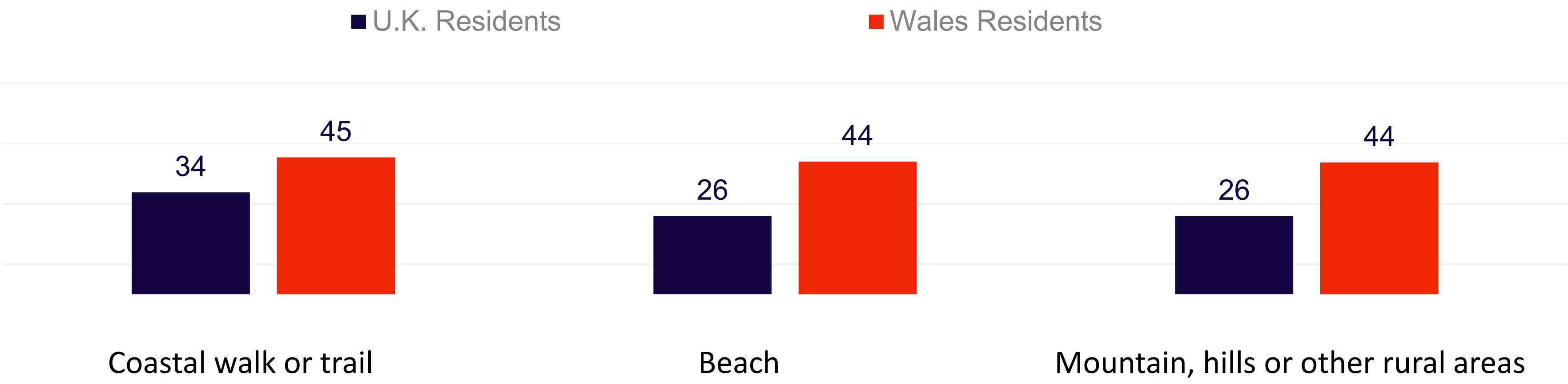


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By 'normal' we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Anticipated activity compared to ‘normal’ in next few months

- UK adults are more likely to visit outdoor areas such as beaches, mountains or hills/rural areas, and coastal walks/trails, significantly more so amongst Wales residents compared to the wider population.

Figure 13. Outdoor areas more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 14-16, U.K. and Wales

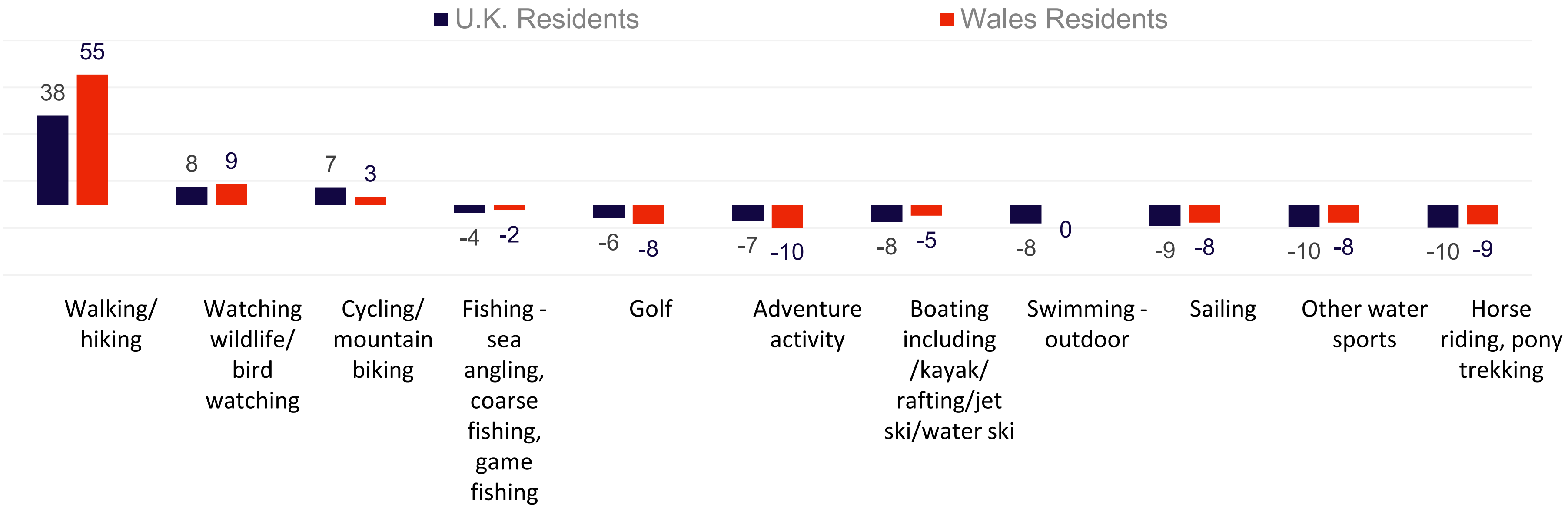


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By ‘normal’ we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Anticipated activity compared to 'normal' in next few months

- Both Wales and residents elsewhere in the U.K. anticipate a large net increase in likelihood to go walking/hiking over the next few months
- There is also an anticipated increase in likelihood of watching wildlife and cycling/ mountain biking. There is likely to be a small net decrease in anticipation to undertake most other outdoor activities.

Figure 14. Outdoor activities more or less likely to do compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Wales

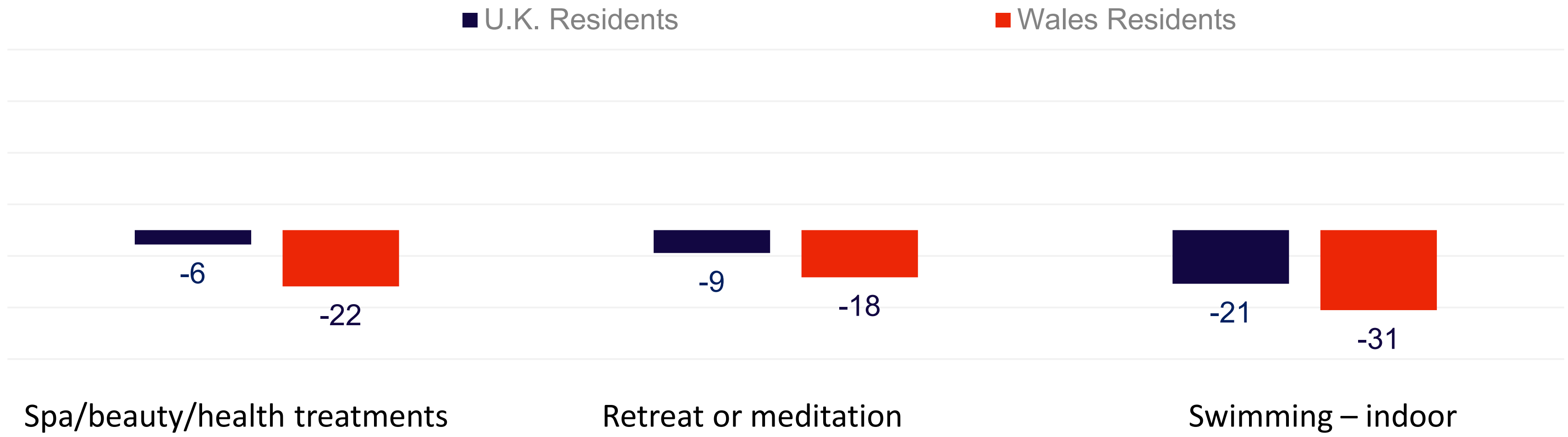


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By 'normal' we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

Anticipated activity compared to 'normal' in next few months

- In general, U.K. adults indicate lower than normal expectation to undertake indoor swimming, retreats or meditation or health and beauty treatments in the next few months, reflecting continued anxiety around close personal contact and indoor environments. The expectation to undertake these activities is notably lower amongst Welsh residents.

Figure 15. Indoor health and wellness more or less likely to do compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Wales

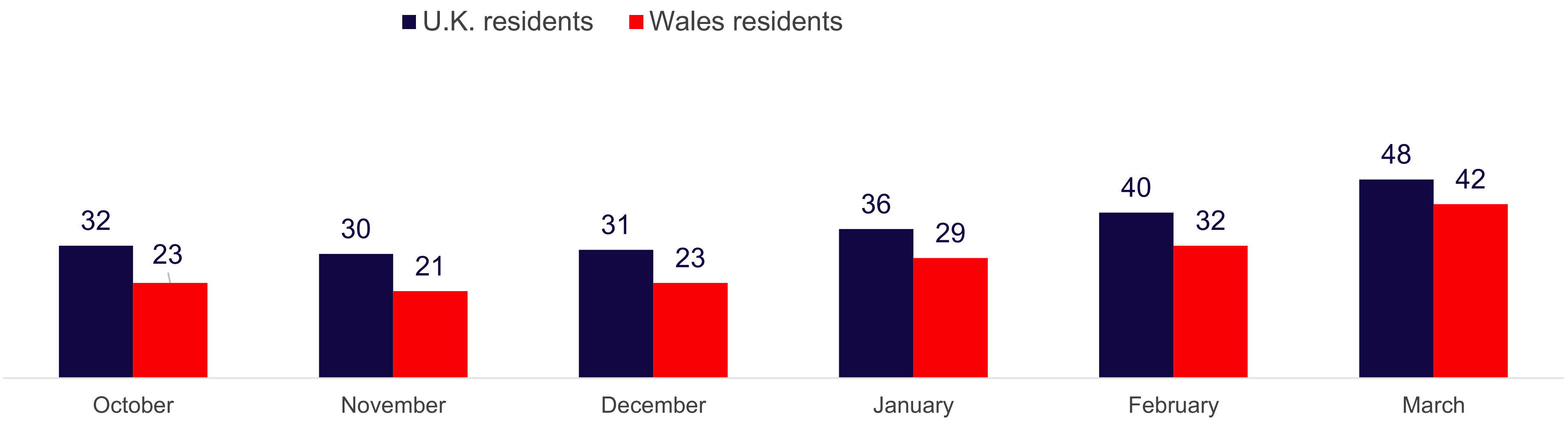


QVB9a/b. VB10a/b. Which, if any, of these types of places in the U.K. are you more likely than normal to visit over the next few months? By 'normal' we mean your typical behaviour had the COVID-19 pandemic not occurred
Base: All U.K. respondents. n=5,260; All Wales respondents n=596

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

- Confidence in the ability to take an overnight trip in the U.K. is relatively low, less than a third of the U.K. population very or fairly confident they'd be able to take one before the end of the year. Confidence levels are significantly lower than they were for the equivalent period earlier in the year, likely reflecting the reintroduction of local restrictions. Notably, Wales residents are significantly less confident in their ability to book an overnight trip than U.K. residents on the whole.
- Confidence is higher for taking trips next year.

Figure 16. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Waves 14-16, U.K.

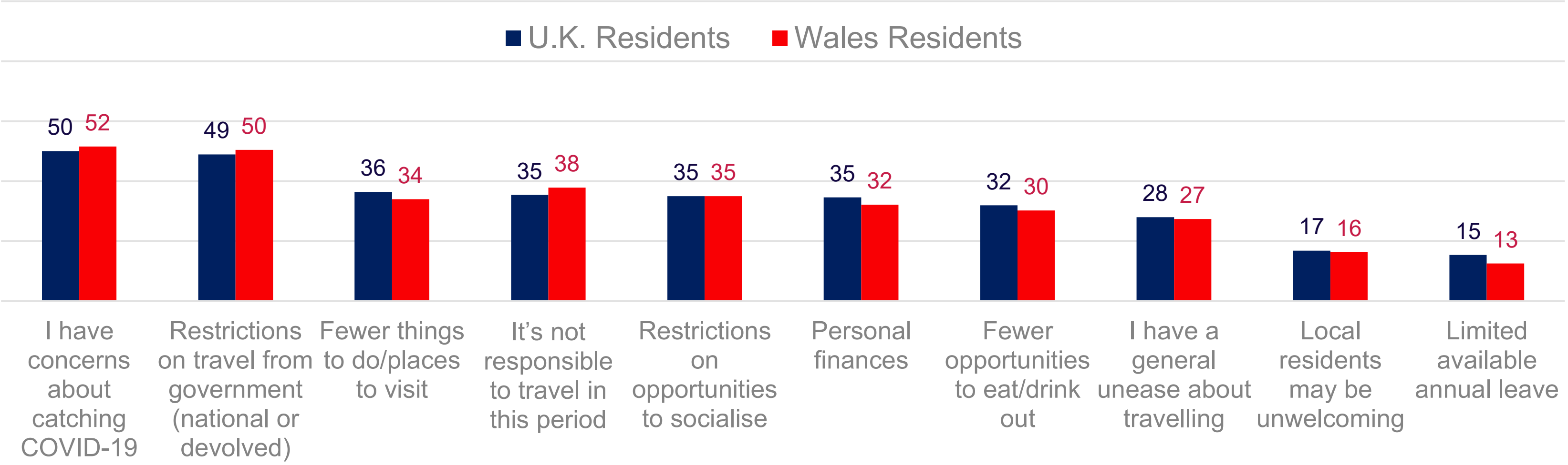


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All U.K. respondents. n=5,260; All Wales respondents n=596

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

- 'I have concerns about catching COVID-19' is the main reason for lack of confidence about taking a domestic holiday or short break amongst both U.K and Wales residents, followed closely by 'restrictions on travel from government'. 'Government restrictions' was a reason for just 36% of U.K. residents in August, underlining its growing influence in driving confidence and behaviour.
- A range of other reasons are given for lack of confidence including those centring around 'things to do', as well as a sense of responsibility, and personal finances.

Figure 17. Reasons for not being confident about travelling from October to March, Percentage, Waves 14-16, 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 October and March? Base: All U.K. respondents. n=2,986; All Wales respondents n=373

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

- Notably, confidence in taking domestic overnight trips dropped significantly in mid-September, correlating with a rise in the influence of government restrictions and restrictions on things to do.

Figure 18. Confidence in taking a U.K. overnight trip across a range of different months by wave, Percentage Waves 14-16, U.K.

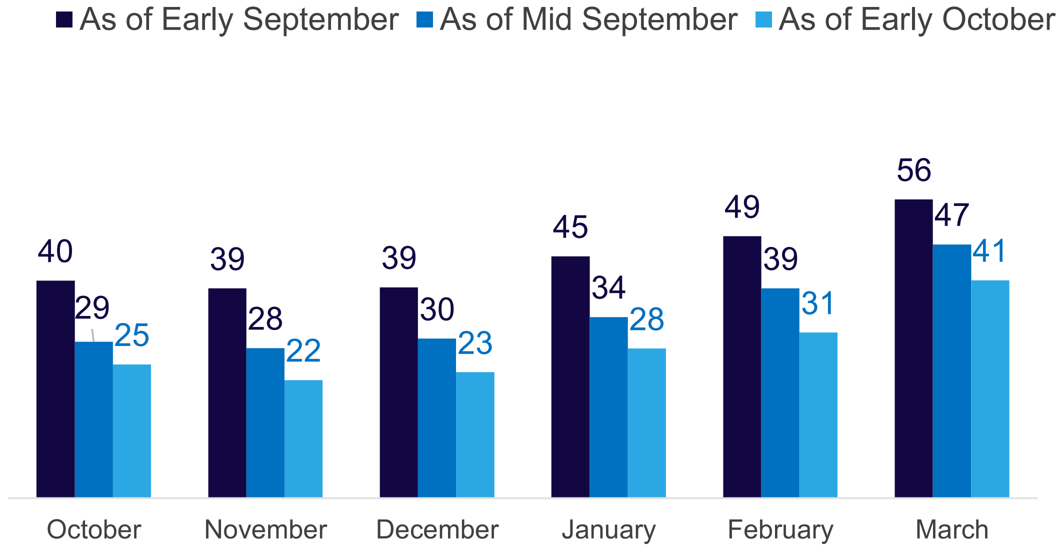
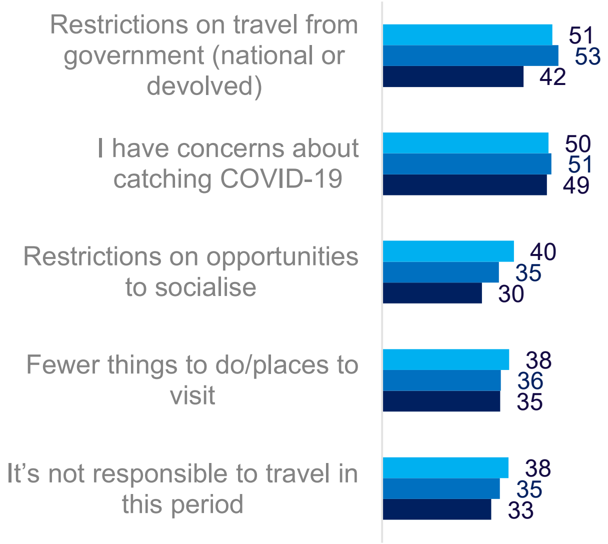


Figure 19. Reasons for not being confident about travelling from October to March by wave, Percentage, Waves 14-16, U.K.



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: Early September n= 1,762; Mid September n=1756; Early October n= 1,742

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

- U.K. adults of retirement age remain the least confidence in their ability to take a domestic overnight trip, followed by 'older independents' – both most likely to be driven by concerns around catching COVID-19 and restrictions on travel from government.

Figure 20. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Percentage Waves 14-16, U.K.

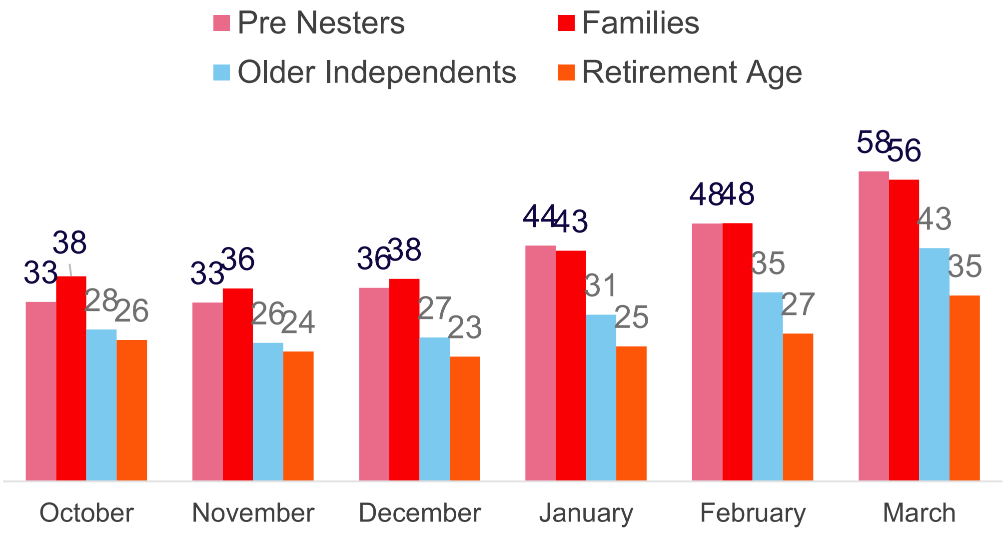
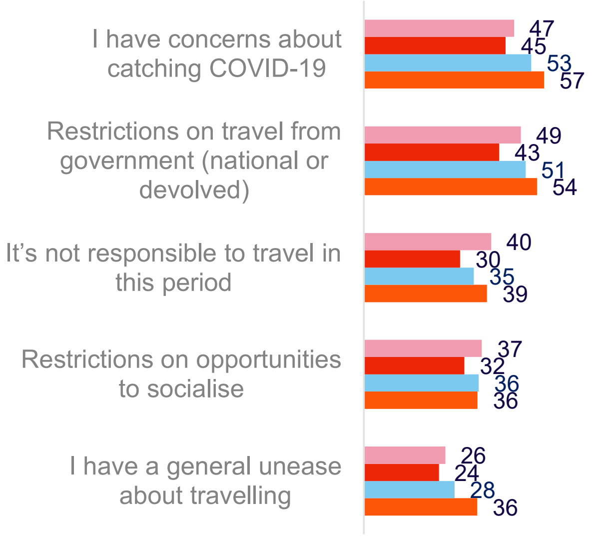


Figure 21. Reasons for not being confident about travelling from October to March by life stage, Percentage, Waves 14-16, U.K.



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: pre-nesters n=1149; Families n=1581; Older Independents n=1645; retirement age n=885;

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

- Unsurprisingly, there are significant differences in confidence across 'risk segments'. The most risk-averse segment – COVID impacted – are the least likely to exhibit confidence with taking an overnight U.K. trip, whilst the least risk-averse – Life Goes On – are the most likely to do so. COVID Impacted's lack of confidence is driven primarily by fear of catching the virus.

Figure 22. Confidence in taking a U.K. overnight trip across a range of different months by risk segment, Percentage Waves 14-16, U.K.

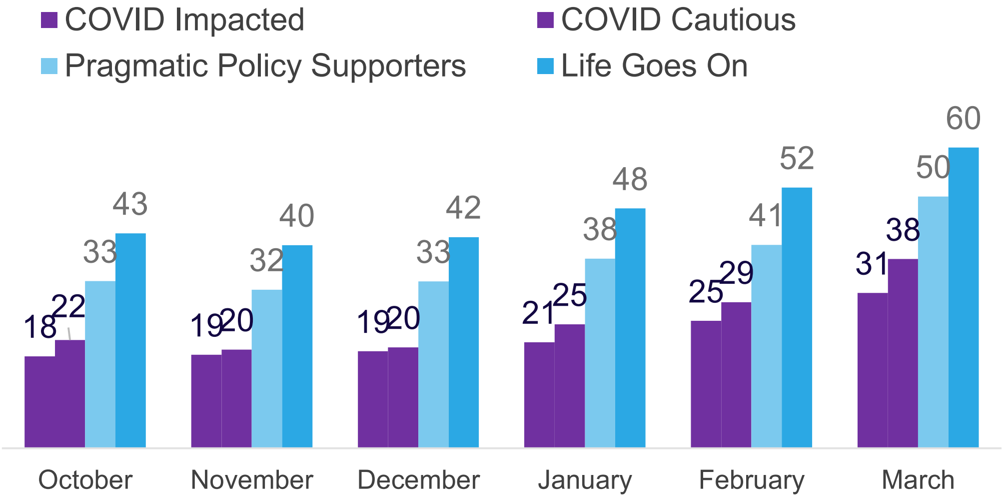
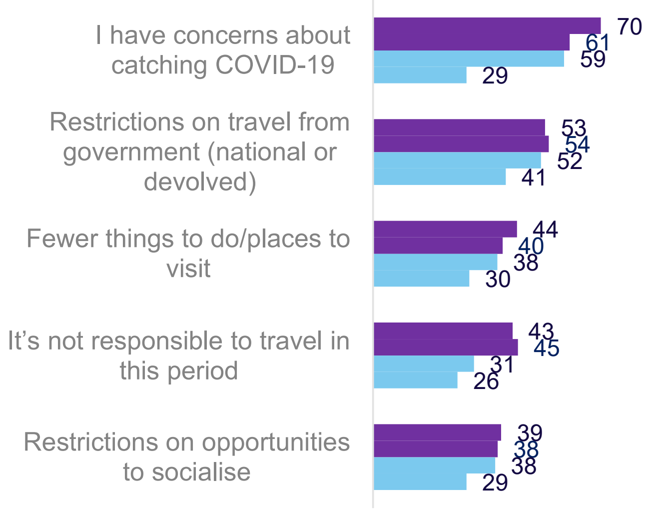


Figure 23. Reasons for not being confident about travelling from October to March by risk segment, Percentage, Waves 14-16, U.K.



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: COVID Impacted n=262; COVID cautious n=1116; Pragmatic policy supporters n=557; Life Goes On n=1051

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

- There are some minor differences in confidence levels amongst residents of 'locked down England areas' compared to those that are not yet locked down in England, although it's likely our definitions do not capture the nuance of *county or city-level local* restrictions. Unsurprisingly, government restrictions tend to index higher as a barrier to taking trips amongst residents of locked down areas.

Figure 24. Confidence in taking a U.K. overnight trip across a range of different months by lockdown status, Percentage Waves 14-16, U.K.

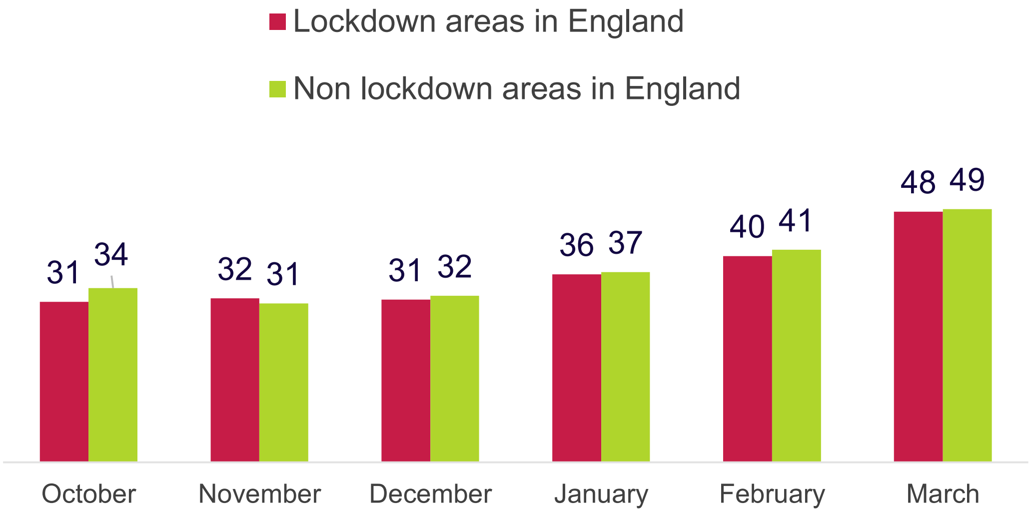
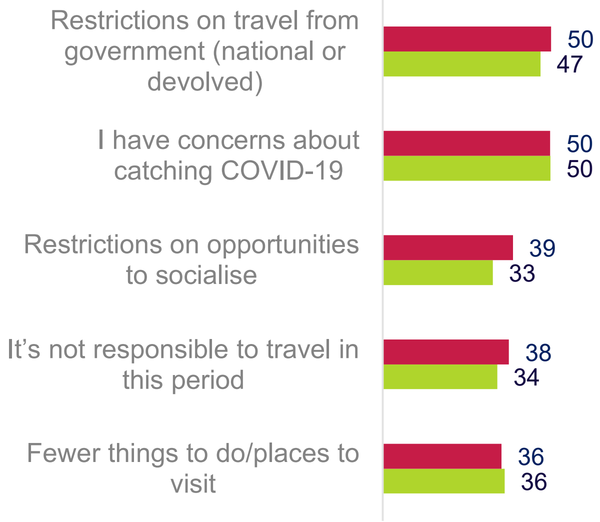


Figure 25. Reasons for not being confident about travelling from October to March by lockdown status, Percentage, Waves 14-16, U.K.



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? Lockdown areas in England (North West, North East and West Midlands) n= 1,148; Non-lockdown areas in England (all other areas) n=2,657

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

- Confidence is higher amongst U.K. intenders (U.K. adults intending on taking an overnight trip anywhere in the U.K.) than Wales intenders (U.K. adults intending on taking an overnight trip in Wales) – although the proportion confident up until January is below half for both audiences. Lower confidence amongst Wales intenders is driven by a high incidence of concerns around catching COVID-19, restrictions on activity and a sense that it is not responsible to travel in this period.

Figure 26 Confidence in taking a U.K. overnight trip across a range of different months by intenders, Percentage Waves 14-16, U.K.

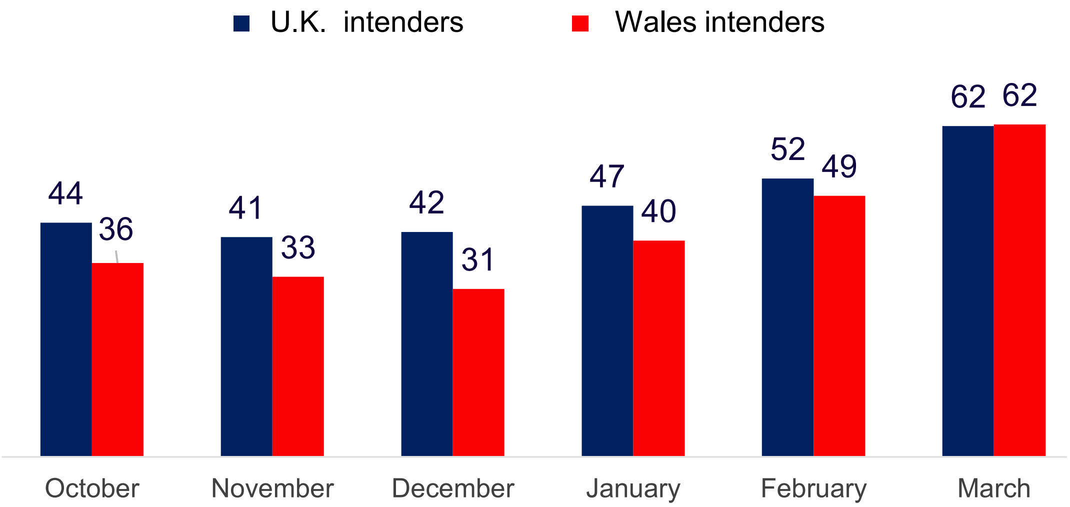
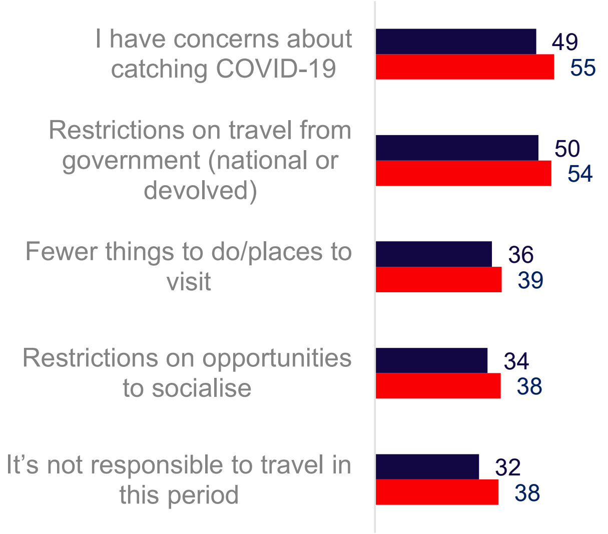


Figure 27. Reasons for not being confident about travelling from October to March by intenders, Percentage, Waves 14-16, U.K.



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: All U.K. intenders n=2689 All Wales Intenders n=311

Upcoming trip intentions

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

- 20% of U.K. residents anticipate taking a domestic short break or holiday between October and December 2020, 15% of Wales residents. On average U.K. resident trip-takers plan on taking 2 trips between now and the end of the year, Wales resident trip-takers 1.7 trips. This amounts to 10.8 million U.K. adults planning on taking a trip and 21.6 million adult *trip-takers* (each adult planning on taking a trip counted twice) from October to December 2020.
- 12% plan on taking an overnight trip between January and March, 9% amongst Wales residents.
- From April onwards, 40% plan on taking an overnight trip, 37% amongst Wales residents.
- The gap in intention between Wales residents and wider U.K. residents is consistent with reporting in June and July (the gap had closed in August) when there tended to be more restrictions in place in Wales than in England.

Figure 28. Proportion anticipating an overnight U.K. trip in each time period , Percentage, Waves 14-16, U.K.

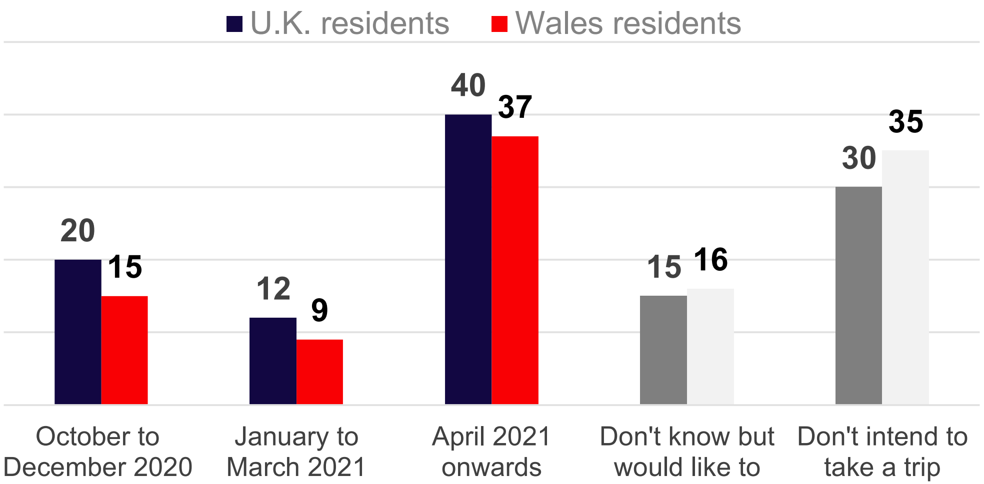
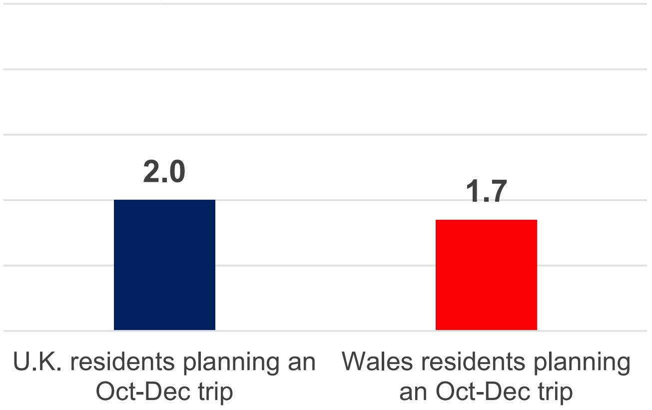


Figure 29. Average number of U.K. overnight trips planned between October to December 2020, Average, Waves 14-16, U.K.

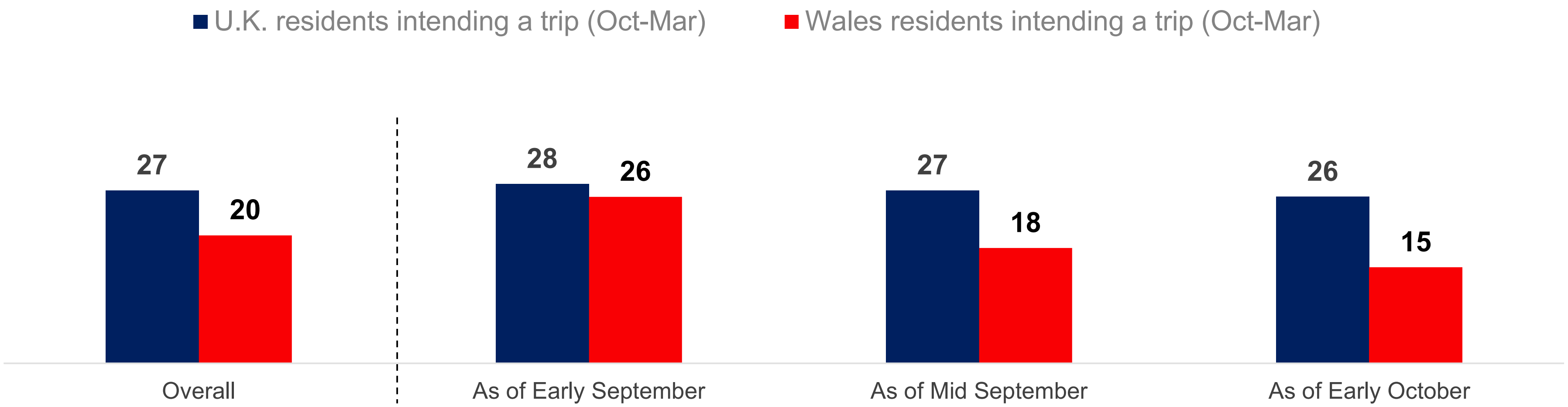


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Waves 14-16 U.K. population n=5,260; Wales population n=596

October to March trip intentions overall and by research period

- Around 1 in 4 (27%) U.K. residents intend to take an overnight domestic short break or holiday by March 2021, 20% of Wales residents. It's notable that since early September, intention to take an overnight trip has dropped only slightly amongst U.K. residents, but significantly amongst Wales residents, perhaps highlighting the impact of new restrictions along the densely populated M4 corridor.

Figure 30. Proportion anticipating a trip between October and March by time period, Percentage, Waves 14-16, U.K.

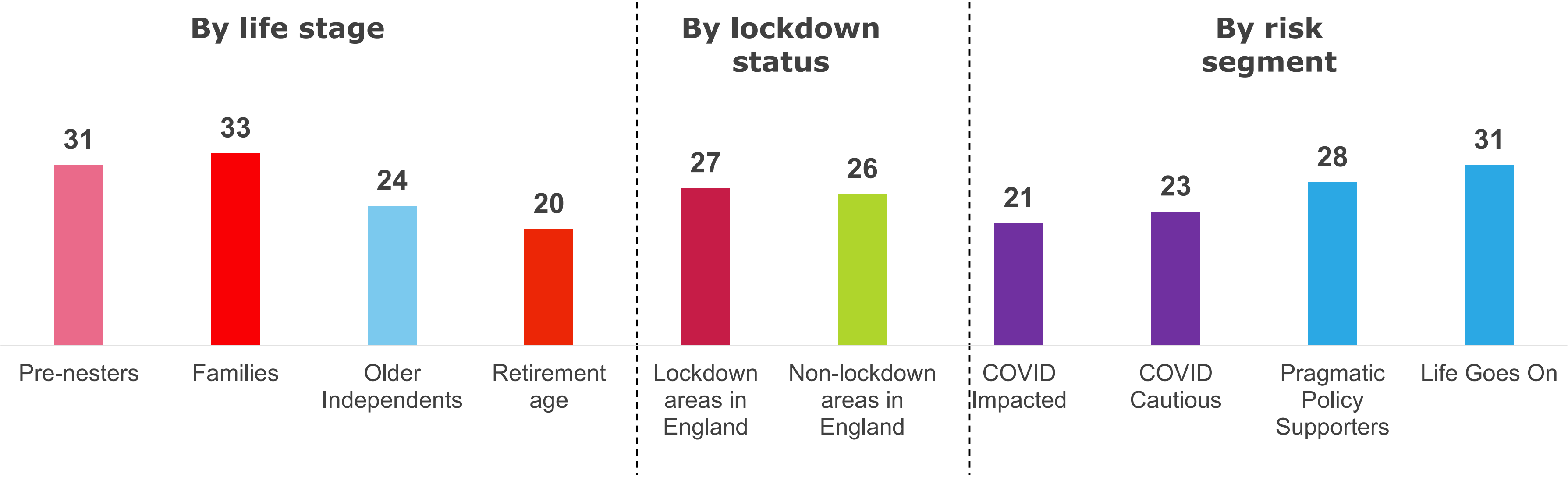


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents. Waves 14-16 U.K. population n=5,260; Wales population n=596

Proportion anticipating an October to March overnight trip

- Consistent with reporting from the start of the pandemic, intention to take an overnight domestic trip is highest amongst 'pre-nesters', 'families' and the 'life goes on' segment. Older age groups and more risk-averse segments are less likely to intend to take a trip in this time period.

Figure 31. Proportion anticipating a trip between October and March by sub-groups, Percentage, Waves 14-16, U.K.

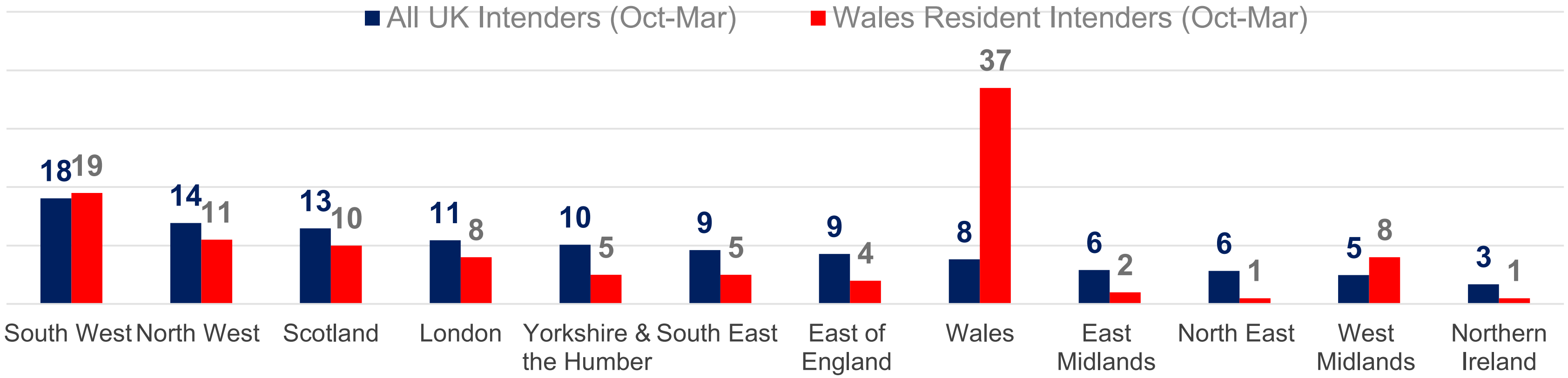


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: pre-nesters n=1149; Families n=1581; Older Independents n=1645; retirement age n=885; Lockdown areas in England (North West, North East and West Midlands) n= 1,148; Non-lockdown areas in England (all other areas) n=2,657 COVID Impacted n=262; COVID cautious n=1116; Pragmatic policy supporters n=557; Life Goes On n=1051

Where planning on staying on next U.K. trip

- The South West of England is the preferred U.K. destination for all trip intenders between October and March, followed by the North West of England and Scotland.
- 8% of U.K. intenders plan on taking their next trip to Wales (1.16 million UK adults), rising to 37% amongst Wales residents intending to take a trip.

Figure 32. Where planning on staying on next U.K. overnight trip between October and March , Percentage Waves 14-16, U.K. and Wales Residents

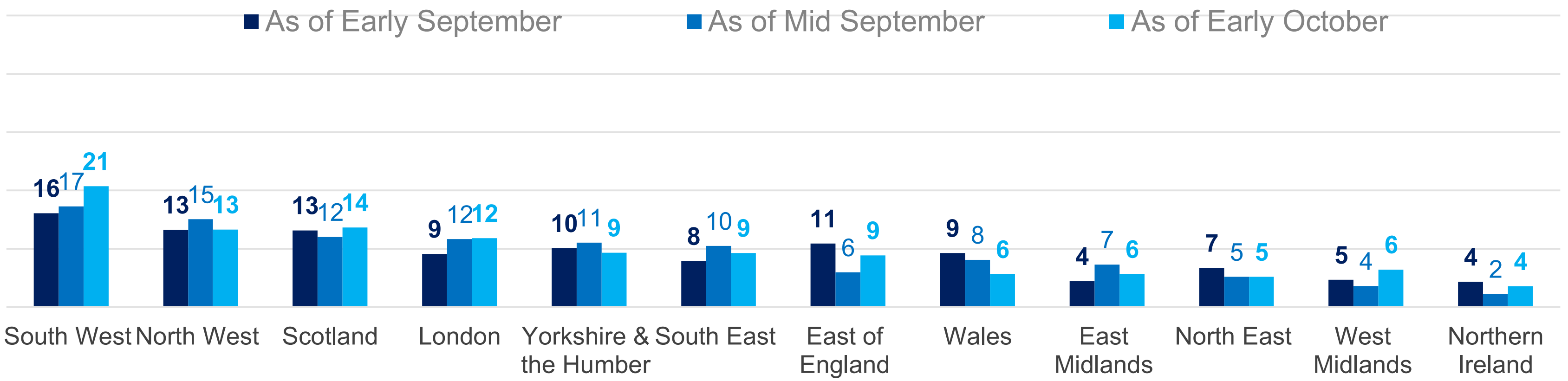


QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the U.K. between October and March U.K. Intenders (Oct-Mar) n=1291, Wales Resident Intenders (Oct-Mar) n=117

Where planning on staying on next U.K. trip

- Notably, Wales' share of intended trips has dropped in recent waves, coinciding with an increase in government restrictions. In early September, Wales was the intended destination for 9% of October to March intenders, but as of early October, it was the intended destination for 6%. The North East – another region of the U.K. impacted by tighter restrictions – has also experienced a drop, whilst London and South West England (which have not yet experienced further restrictions) has experienced a rise in intentions.

Figure 33. Where planning on staying on next U.K. overnight trip between October and March by time period , Percentage Waves 14-16, U.K. and Wales Residents



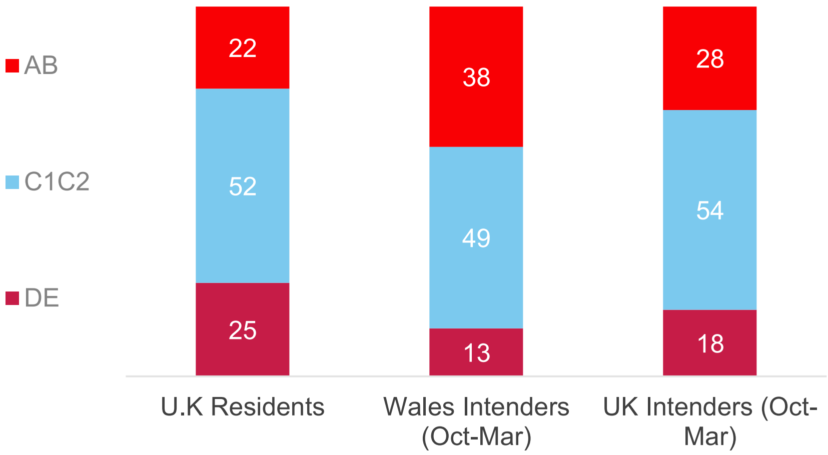
QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the U.K. between October and March Early September n= 417; Mid September n=450; Early October n= 424

Demographics of Wales intenders compared to general population

- People intending to visit Wales between October to March 2021 are more likely than the U.K. population to be 'pre-nesters' and belonging to social grades AB. The incidence of 'Older Independents' planning a trip to Wales is consistent with the fall-out in the general population, and higher than amongst all U.K. intenders. Retirees are less likely to be intending to take a trip anywhere in the UK over the winter . Families make up a higher proportion of those intending to take a UK trip than a Wales trip. DE social groups make up a much lower proportion of trip intenders.

Figure 34. Breakdown of populations and intenders by life stage, Percentage Waves 14-16, U.K. and Wales

Figure 35. Breakdown of populations and intenders by social grade, Percentage Waves 14-16, U.K. and Wales



Source: Demographics. Base: All respondents. U.K. population n=5260; Wales inclusive intenders n=117; U.K. intenders n=1291

Financial segments and financial impact of COVID-19 on intenders

- Consistent with previous reporting periods, U.K. adults planning a trip to Wales are more likely to describe themselves as better off financially than before the pandemic. Wales intenders for the October to March period are less likely than U.K. intenders to have had their employment impacted by COVID-19.
- Around a half of people intending to take a UK trip state they have to be careful with finances or have been hard hit, emphasising potential for cautious trip spending by these.

Figure 36. Breakdown of intenders by financial segments, Percentage Waves 14-16, U.K. and Wales

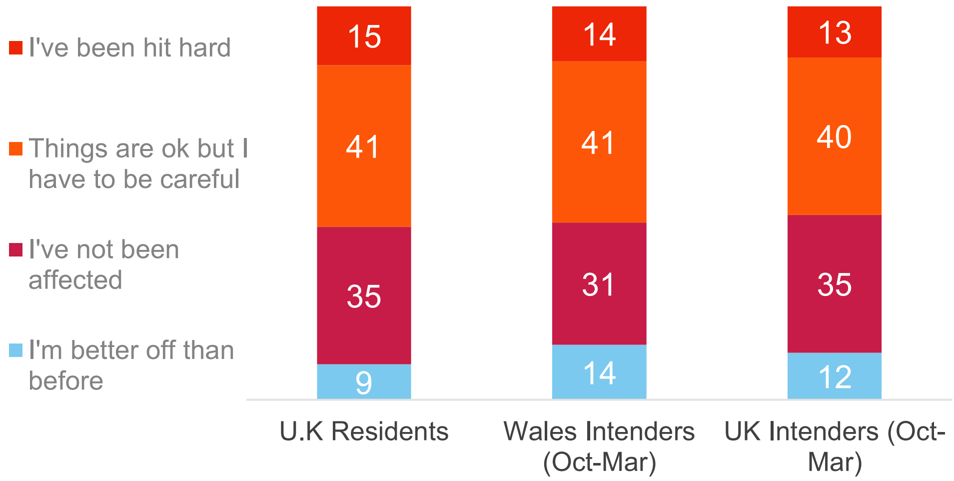
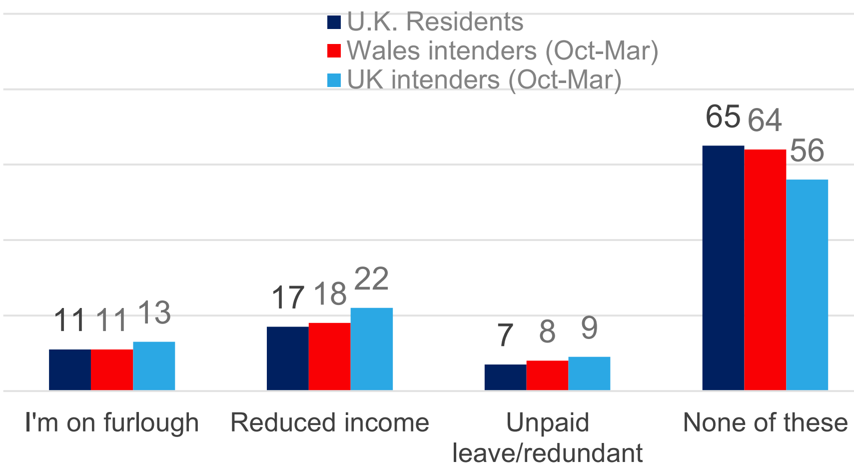


Figure 37. Employment impact on intenders, Percentage Waves 14-16, U.K. and Wales

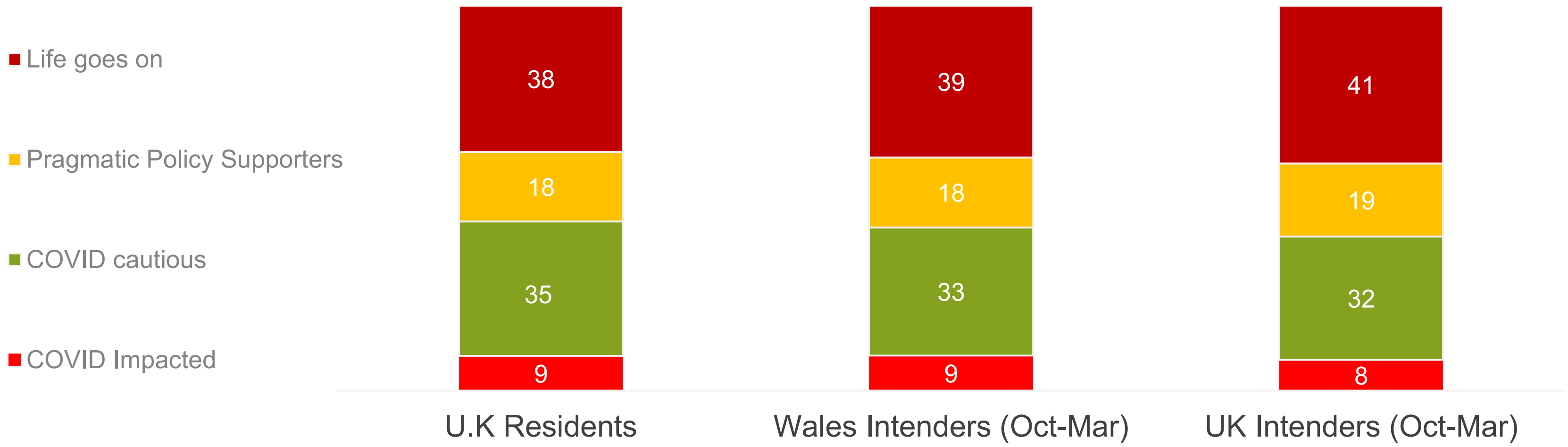


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Source: Demographics. Base: All respondents. U.K. population n=5260; Wales inclusive intenders n=117; U.K. intenders n=1291

Attitudinal segments of intenders (see definitions page for more information)

- The 'life goes on' risk segment continues to make up around 2 in 5 Wales and U.K. intenders for October to March, consistent with the fall-out in the general population. However, with only a small proportion of trips having been booked, and other segments exhibiting significantly lower confidence in trips going ahead, it's likely that 'life goes on' will make up a higher proportion that will *actually* go through with their trip. Indeed this was the case for trips taken since the summer, 'life goes on' making up nearly half of Wales trip-takers.

Figure 38. Breakdown of intenders by risk segments, Percentage Waves 14-16, U.K. and Wales



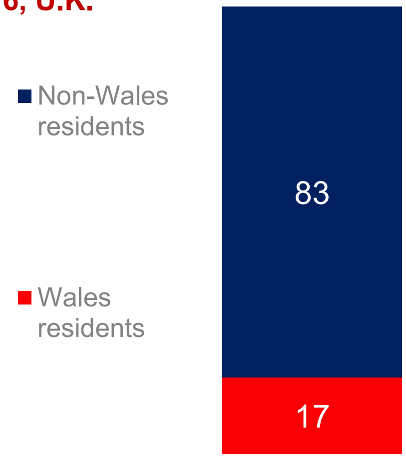
Base: All respondents. U.K. population n=5260; Wales inclusive intenders n=117; U.K. intenders n=1291

Intention to visit Wales by region of residence

- Nearly 2 in 5 of Wales residents planning on an October to March overnight trip are planning to take this trip in Wales. This is relatively consistent with previous reporting, although it's worth remembering that the overall number of Wales residents planning any October to March trip has declined in recent weeks.
- The vast majority (83%) of those planning on a trip to Wales between October and March live outside Wales. Residents from the West Midlands and the North West are the most likely to intend to visit, although local lockdown restrictions in these areas may put these visits into doubt.

Figure 39. Intention to take a trip to Wales amongst October to March trip-takers by region of residence, Percentage, Waves 14-16, U.K.

Figure 40. Breakdown of Wales Oct-Mar intenders by region of residence, Percentage Waves 14-16, U.K.

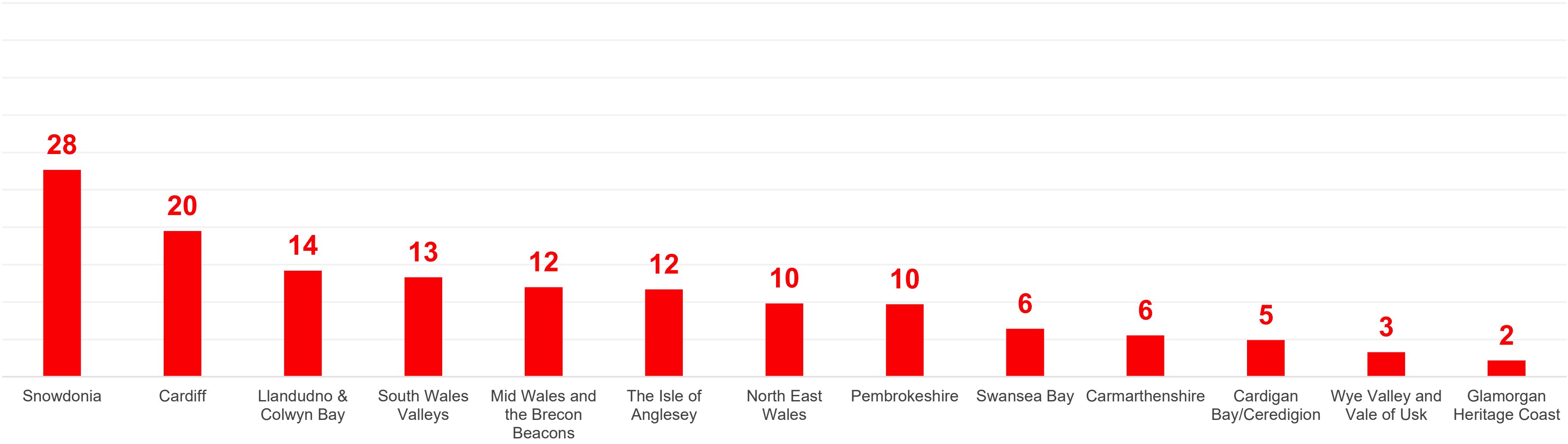


QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All residents planning on taking a holiday or short break in the U.K. between Oct-Mar. Residents in each region Wales n=101, East of England n=61; East Mids n=86; North East n=49; North West n=129; South East n=144; South West n=99; West Mids n=104; Yorkshire and The Humber n=89:London n=181; Scotland n=232

Where planning on staying on Wales trip between October and March

- Consistent with previous reporting periods, Snowdonia remains the number one destination for a Wales trip. Snowdonia is followed by Cardiff and Llandudno and Colwyn bay, with a range of other destinations making up the remainder, many of which are now under local restrictive measures.

Figure 41. Planned destination for next Wales trip for October to March intenders , Percentage Waves 14-16, U.K. and Wales

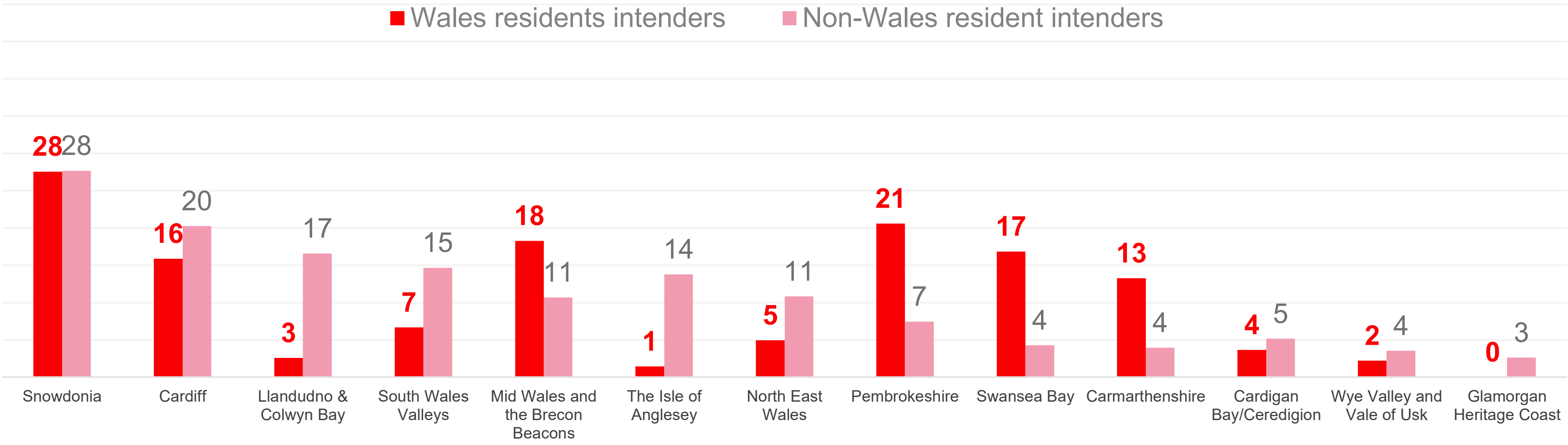


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales Oct-Mar. All Wales intenders n=117

Where planning on staying on Wales trip between October and March

- Consistent with previous reporting periods, Snowdonia is the number one destination for both Wales residents and non Wales residents planning a trip. Wales residents index higher for trips to Pembrokeshire, Mid Wales and the Brecon Beacons, Swansea Bay and Carmarthenshire. Local restrictive measures may continue to impact the feasibility of these trips.

Figure 42. Planned destination for next Wales trip for October to March intenders by residence, Percentage Waves 14-16, U.K. and Wales



QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break in Wales Oct-Mar. All Wales resident intenders n=36*; Non-Wales resident intenders n=81 *Base sizes small – treat indicatively only

Trip purpose and trip length from October to March

- Consistent with previous reporting, the vast majority (79%) of overnight trips to Wales between October and March are likely to be for a 'holiday', higher than the 72% for all U.K. trips. 7 in 10 Wales trips in this period are likely to be short breaks, compared to around 6 in 10 of all U.K. trips. This has a direct impact on spend whilst in Wales – short breaks tending to generate lower spend.

Figure 43. Purpose of next October to March trip, Percentage, Waves 14-16, U.K.

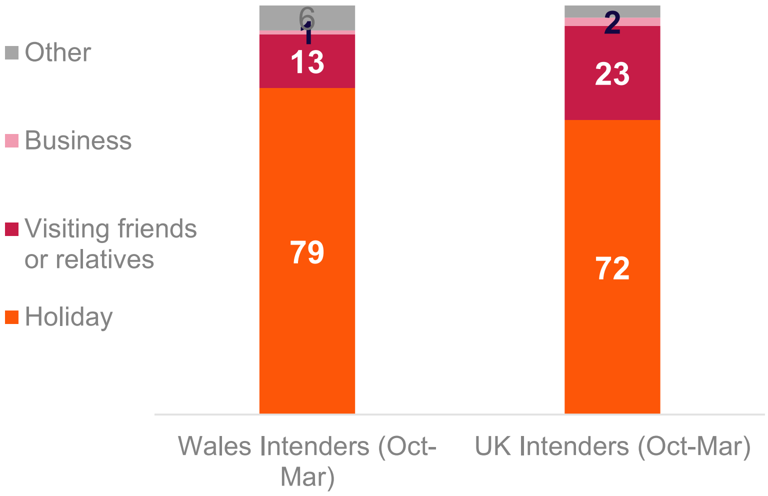
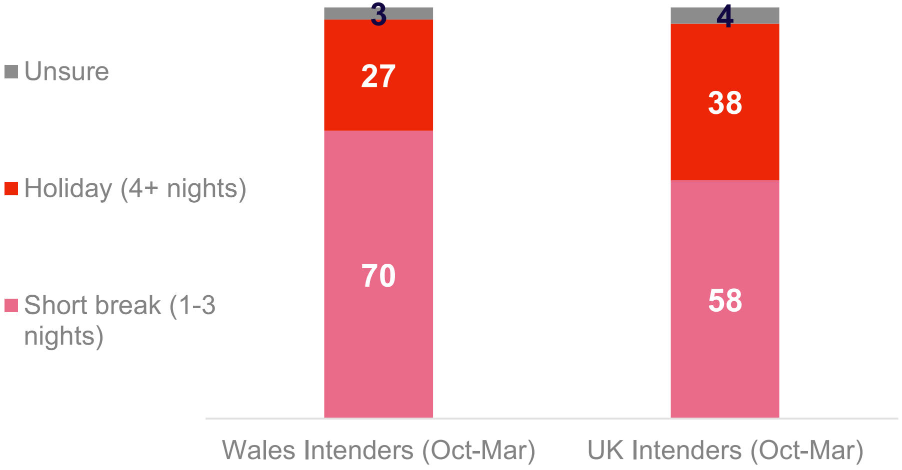


Figure 44. Length of next October to March trip, Percentage, Waves 14-16, U.K.

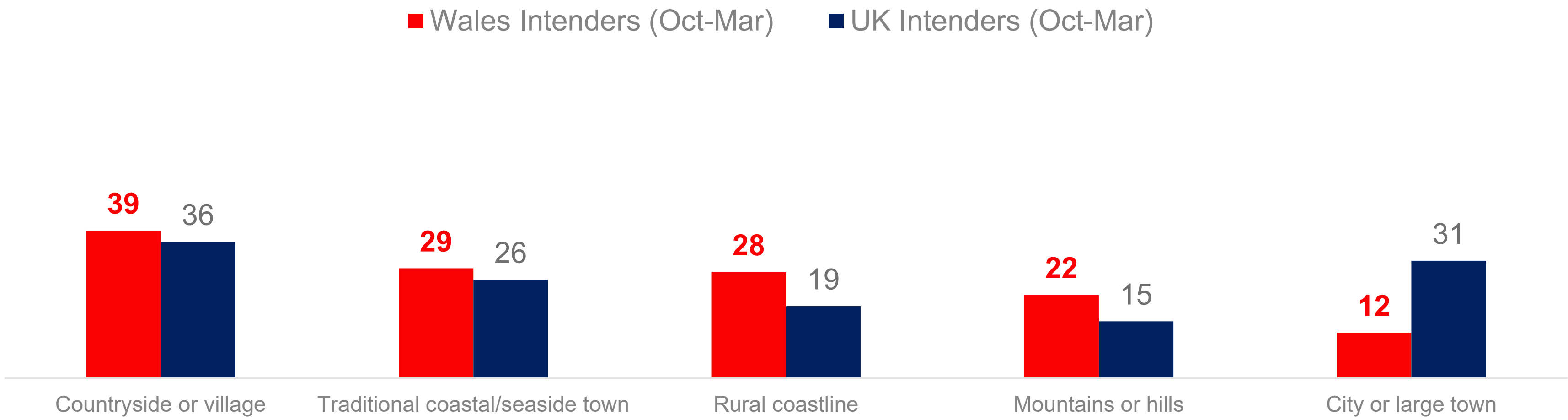


VB6f. And which of the following best describes the purpose of this trip? Wales exclusive intenders n=72; U.K. intenders n=1291

Type of destination for next short break or holiday

- Visitors to Wales between October and March are most likely to stay in the ‘countryside or a village’, followed by a ‘traditional coastal/seaside town’ and ‘rural coastline’ – the latter significantly more than U.K. intenders. Wales intenders are also significantly more likely to be planning an overnight stay in mountains or hills, and significantly less likely to be intending to visit a city or large town.

Figure 45. Main type of destination for October to March intenders, Percentage, Waves 14-16, U.K.

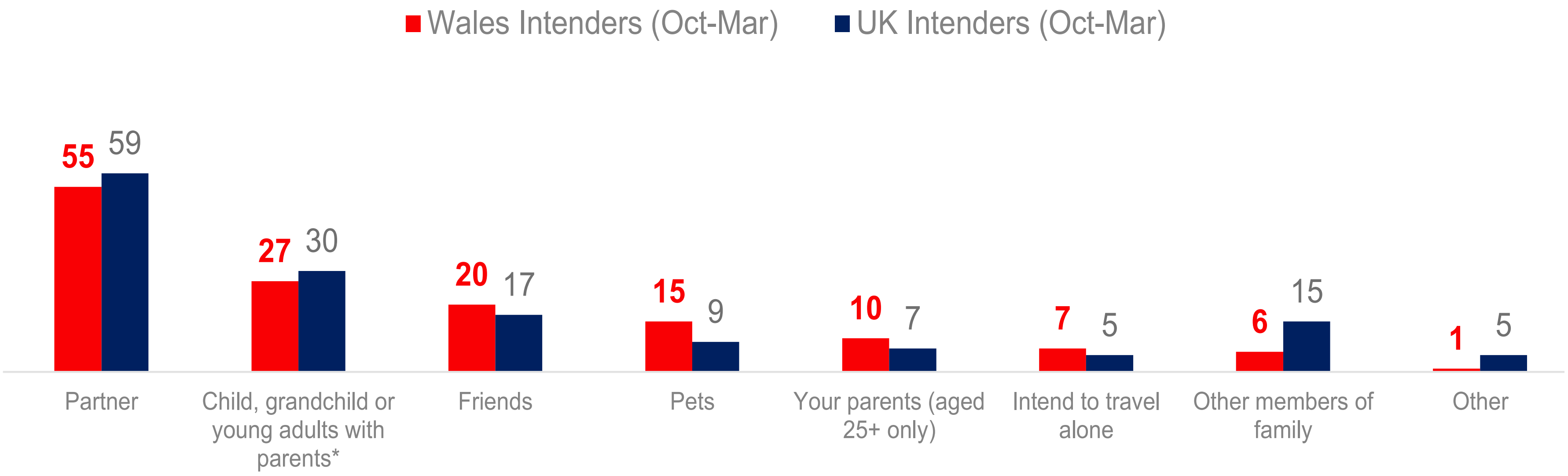


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip?
Base: All respondents planning on taking a holiday or short break from October to March. Wales Exclusive October to March intenders n=72; U.K. intenders n=1291

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

- Visitor parties are most likely to travel to Wales with their partner, nearly 6 in 10 falling into this category. Travelling with a partner is followed by child/grandchildren/young adults which make up around 3 in 10 trip intenders. 1 in 5 Wales trip intenders plan on making the trip with friends, whilst 1 in 7 plan on travelling with a pet – the latter, higher than amongst all U.K. intenders.

Figure 46. Visitor party make-up for October to March intenders, Percentage Waves 14-16, U.K.

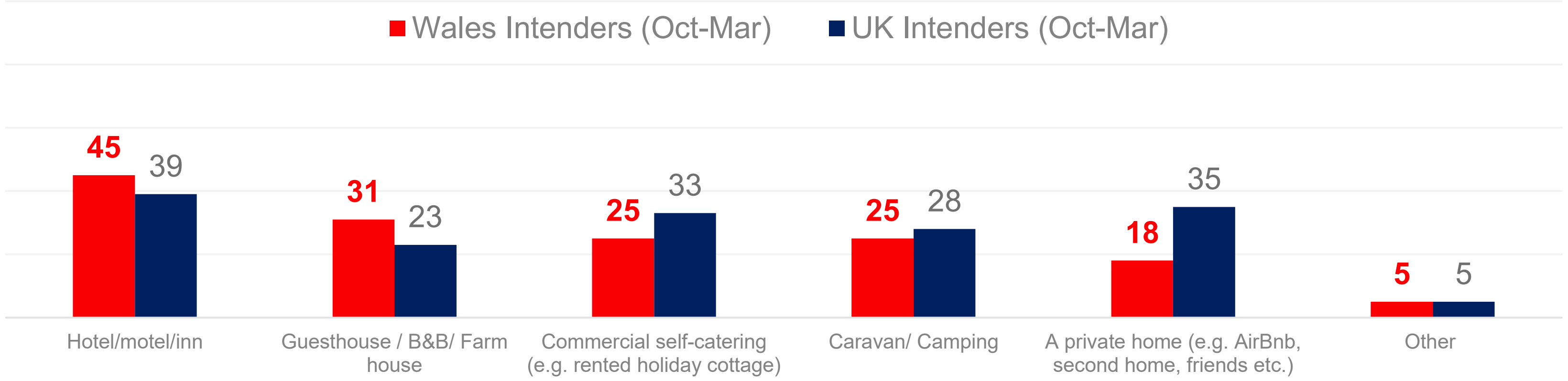


QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents planning on taking a holiday or short break from October to March. Wales Exclusive October to March intenders n=72; U.K. intenders n=1291 Note: Child or young adults includes respondents that states ‘children’, ‘grandchildren’ and 16-24 year olds stating they will travel with their parents

Type of accommodation for next short break or holiday

- Hotel/motel/inn is the preferred accommodation choice for U.K. adults planning a trip to Wales and elsewhere in the U.K. between October and March. Guesthouses and B&Bs are the second most preferred for Wales intenders, following by commercial self-catering and caravan/camping.
- Increased restrictions in September appear to have had some impact on accommodation choice – 'guesthouses/B&Bs' and 'private home' have decreased in incidence, whilst 'commercial self-catering' have increased. It's possible that the self-contained environment of 'commercial self-catering' makes it a more appealing option as COVID-19 cases continue to increase.

Figure 47. Accommodation planning on staying in on next U.K. overnight trip for October to March intenders, Net percentage Waves 14-16, 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 from October to March. Wales Exclusive October to March intenders n=72; U.K. intenders n=1291

Type of accommodation for next short break or holiday

- ‘Static caravan’ is the preferred choice among Wales intenders who intend to go camping/caravanning.
- Of the private home accommodation options, Wales intenders index significantly lower than U.K. intenders on intention to stay with ‘friends or relatives’ or ‘in someone else’s private home on a commercial basis’ (e.g. air bnb), the latter which has declined significantly since mid-September.

Figure 48. Type of camping/caravanning accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Waves 14-16, U.K.

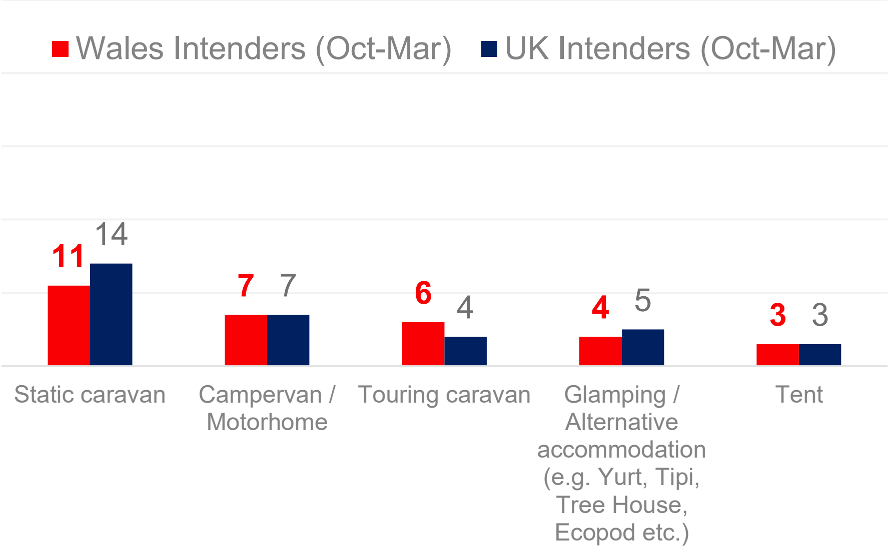
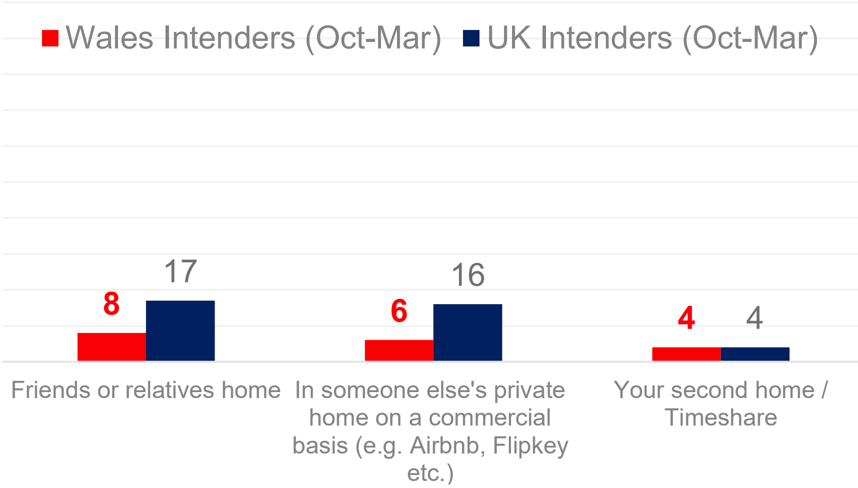


Figure 49. Type of private home accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Waves 14-16, U.K.

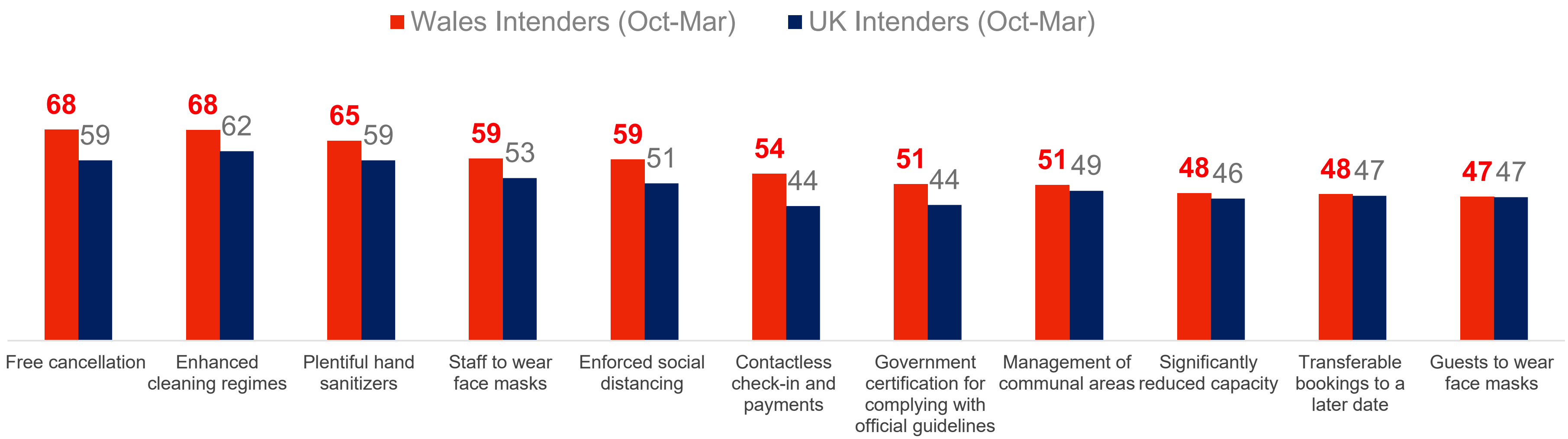


QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip in <insert month>?
Base: All respondents planning on taking a holiday or short break from October to March. Wales Exclusive October to March intenders n=72; U.K. intenders n=1291

Conditions that are essential for a stay in accommodation

- Wales and U.K. intenders have a number of requirements for accommodation to put in place for them to feel confident about staying. Free cancellation and enhanced cleaning regimes are the leading requirements followed by plentiful hand sanitizers. Government or industry certification is also a priority for around half.
- The requirement for staff and guests to wear masks has increased since late summer.

Figure 50. Top 10 conditions that are essential for a stay in accommodation for October to March intenders, Percentage and Net Percentages Waves 14-16, U.K.



Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All respondents planning on taking a holiday or short break from October to March. Wales Exclusive October to March intenders n=72; U.K. intenders n=1291

Anticipated spend on next holiday or short break

- Wales intenders anticipate spending £432 on their October to March trips on average, less than the £615 U.K. intenders expect to spend. This will be very much driven by trip length – Wales trips more likely to be short breaks – but also reinforces Wales' status as a good value destination.

Figure 51. Anticipated spend for Wales October to March intenders , Percentage Waves 14-16, U.K.

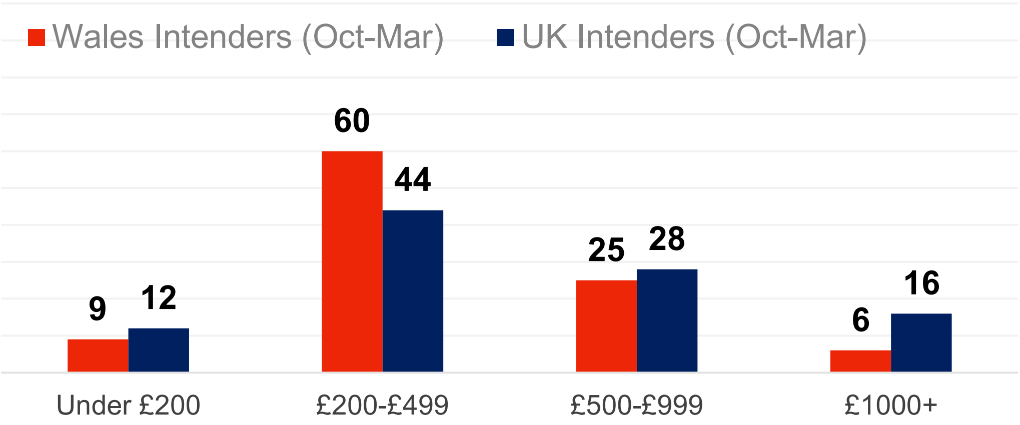
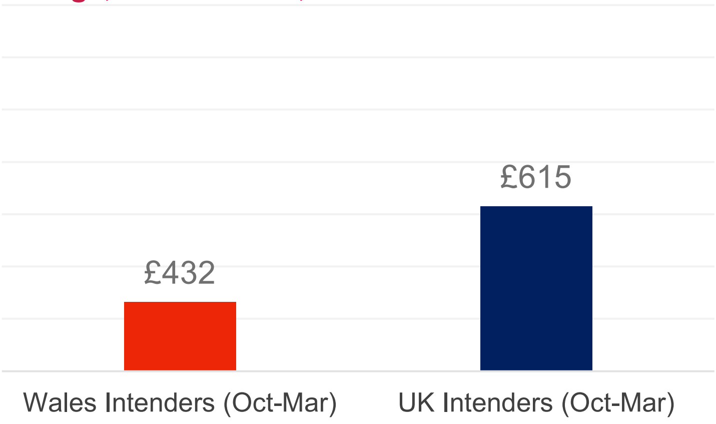


Figure 52. Anticipated average spend for Wales October to March intenders, Average, Waves 14-16, U.K.



QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break from October to March. Wales Exclusive October to March intenders n=71; U.K. intenders n=1178

Whether planned or booked holiday or short break yet

- Only 1 in 4 Wales October to March intenders have already planned their trip, and 1 in 5 have already booked it – both lower than amongst U.K. intenders. The low proportion of those who have booked make trip plans vulnerable to changing travel restrictions and market conditions.

Figure 53. Proportion of October to March intenders that have already *planned* their trip , Percentage Waves 14-16, U.K. and Wales

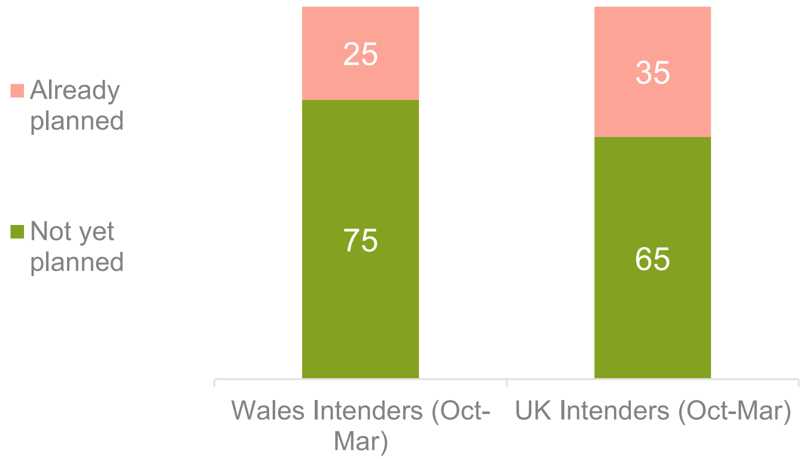
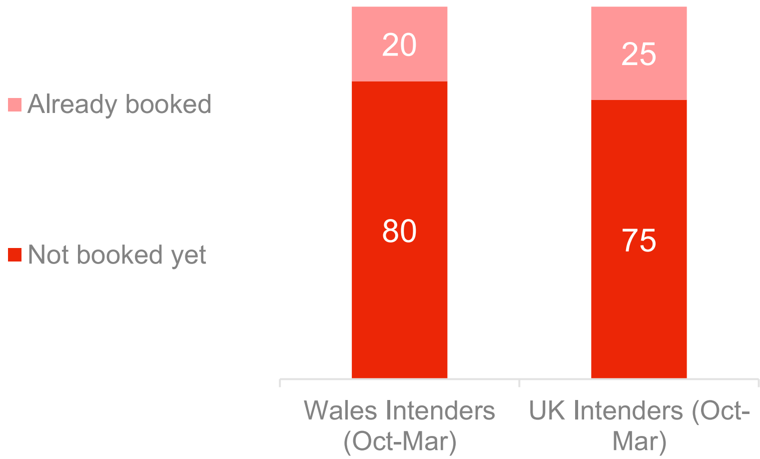


Figure 54. Proportion of October to March intenders that have already *booked* their trip , Percentage Waves 14-16, U.K. and Wales

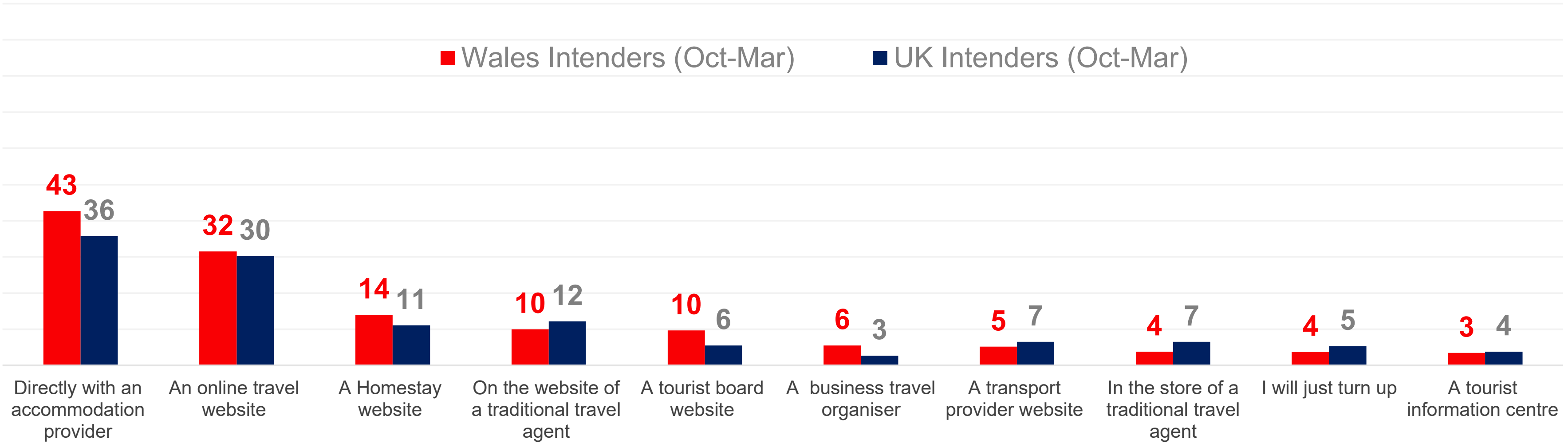


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All respondents planning on taking a holiday or short break from October to March. Wales Inclusive October to March intenders n=112; U.K. intenders n=1291

Preferred booking channel for next Wales short break or holiday

- Wales and U.K. intenders 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 previous reporting periods.

Figure 55. Accommodation booking channel for October to March intenders, Net percentage Waves 14-16, U.K.

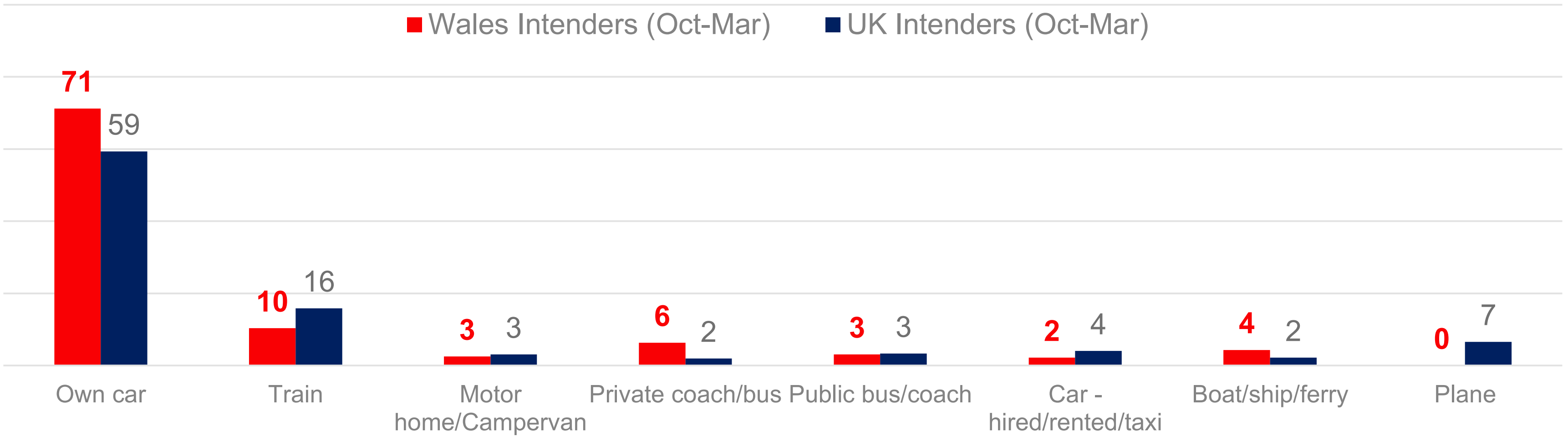


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip?
Base: All respondents planning on taking a holiday or short break from October to March. Wales Inclusive October to March intenders n=112; U.K. intenders n=1291

Main mode of transport for next Wales short break or holiday

- 'Own car' is by far the leading mode of transport intended to be used on trips to Wales, followed by train. Train is less likely to be used amongst Wales intenders than U.K. intenders, reflecting fewer city/town trips.

Figure 56. Top 5 main modes of travel of destination for trip between October to March, Percentage Waves 14-16, 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 from October to March. Wales Inclusive October to March intenders n=112; U.K. intenders n=1291

Trips taken since July

Trips taken and purpose of trips July to September

- As of early October, 30% of U.K. adults (c.16.2 million) had taken an overnight short break or holiday in the U.K since restrictions were lifted in early July – 24% of Wales residents. Both numbers are significantly higher than intended trips before restrictions were lifted
- The higher incidence of UK trips taken is driven by 'VFR' (visits to friends and relatives), although Wales visitors are less likely to fall into this category.

Figure 57. Proportion taken an overnight trip in the U.K. July to September, Percentage Wave 16, U.K.

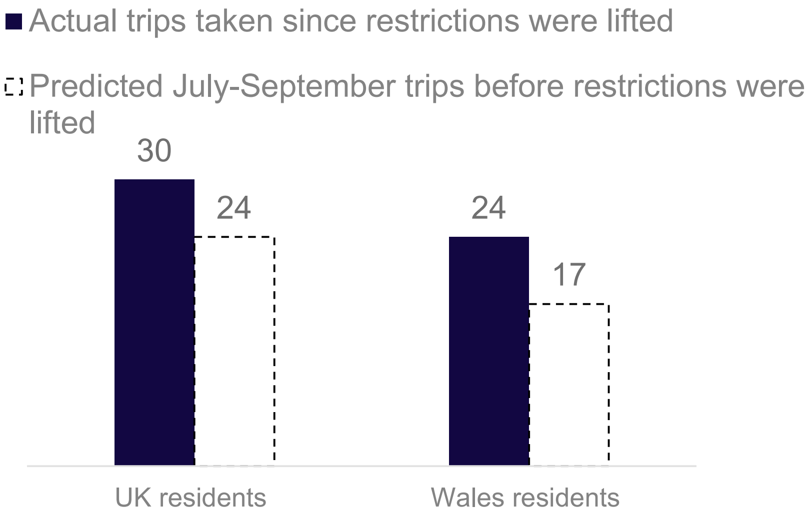
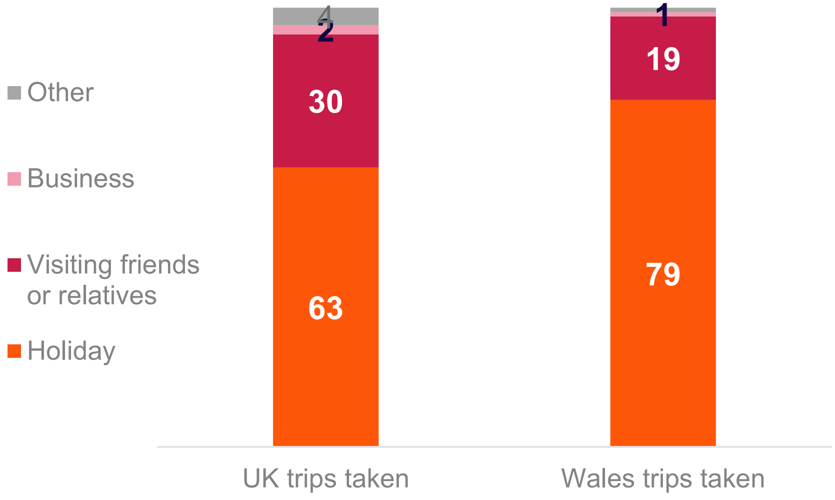


Figure 58. Purpose of overnight trip in the U.K. July to September, Percentage, Waves 14-16, U.K.



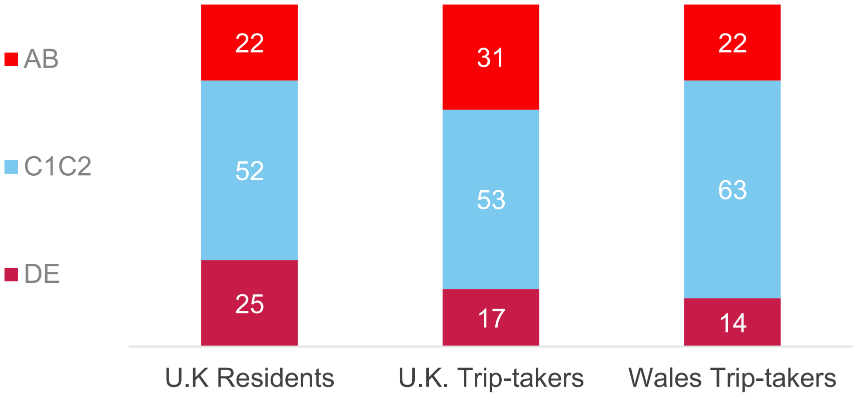
QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the trip you took?
Base: U.K. residents n=5260; Wales residents n=596. U.K. trips taken n=1501; Wales trips taken n=136

Demographics of trip-takers

- Families have made up around 2 in 5 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 who index significantly lower than the population.
- Visitors to Wales include all socio economic groups, but C1C2s have higher representation compared to the wider population and UK trip takers.

Figure 59. Breakdown of population and trip-takers by life stage, Percentage Waves 14-16, U.K. and Wales

Figure 60. Breakdown of population and trip-takers by social grade, Percentage Waves 14-16, U.K. and Wales

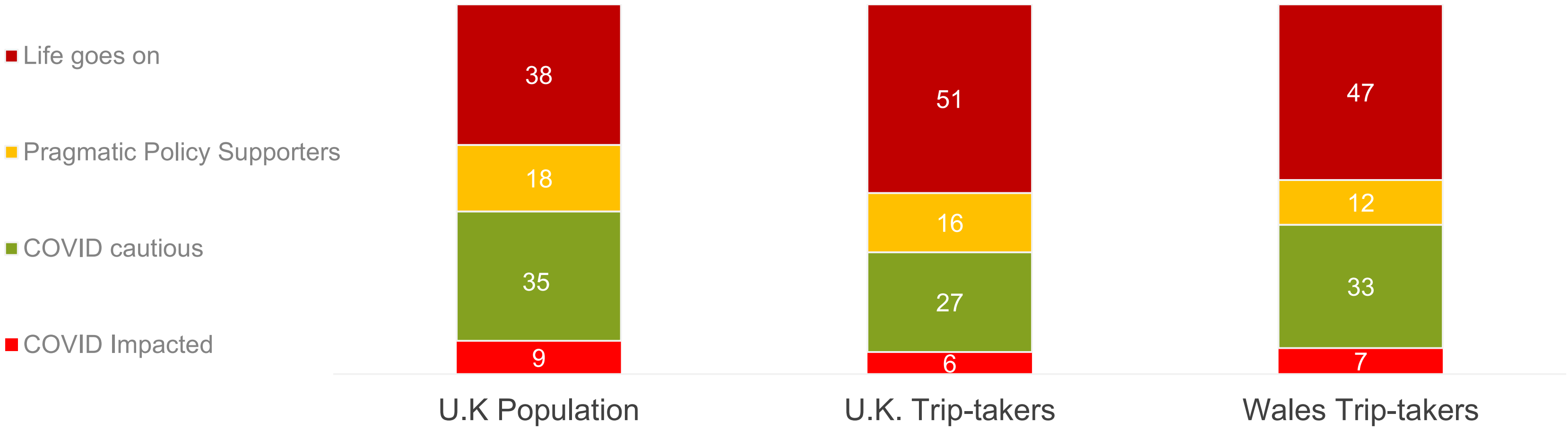


Source: Demographics.
Base: U.K. residents n=5260;. U.K. trips takers n=1501; Wales trip takers n=161

Attitudinal segments (see definitions page for more information)

- The 'life goes on' risk segment made up nearly half of all visitors to Wales since July, significantly higher than their incidence in the U.K. population.

Figure 61. Breakdown by life stage, Percentage Waves 14-16, U.K.

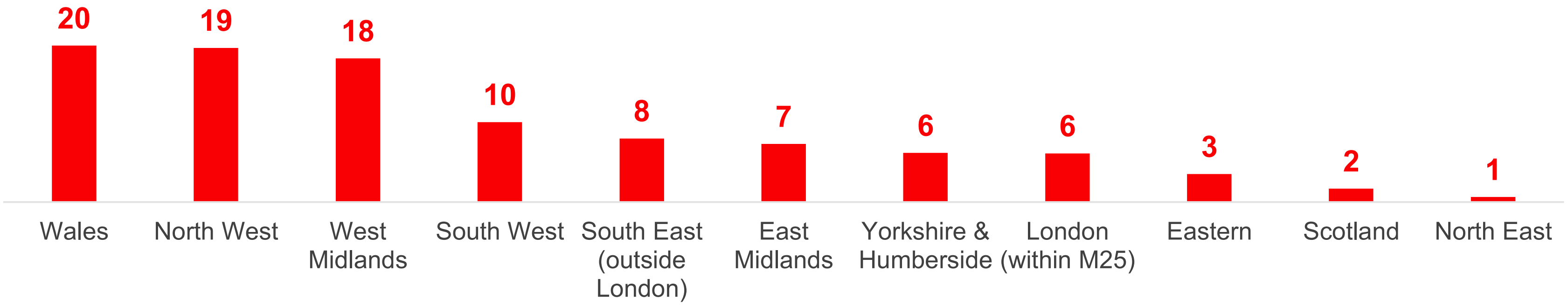


Base: U.K. residents n=5260;. U.K. trips takers n=1501; Wales trip takers n=161

Region of origin of trip-takers to Wales since July

- 20% of all overnight visitors to Wales since July lived in Wales, with around half living in the North West of England, the West Midlands or the South West of England.

Figure 62. Region of origin of trip-takers to Wales since July, Percentage Waves 14-16, U.K.



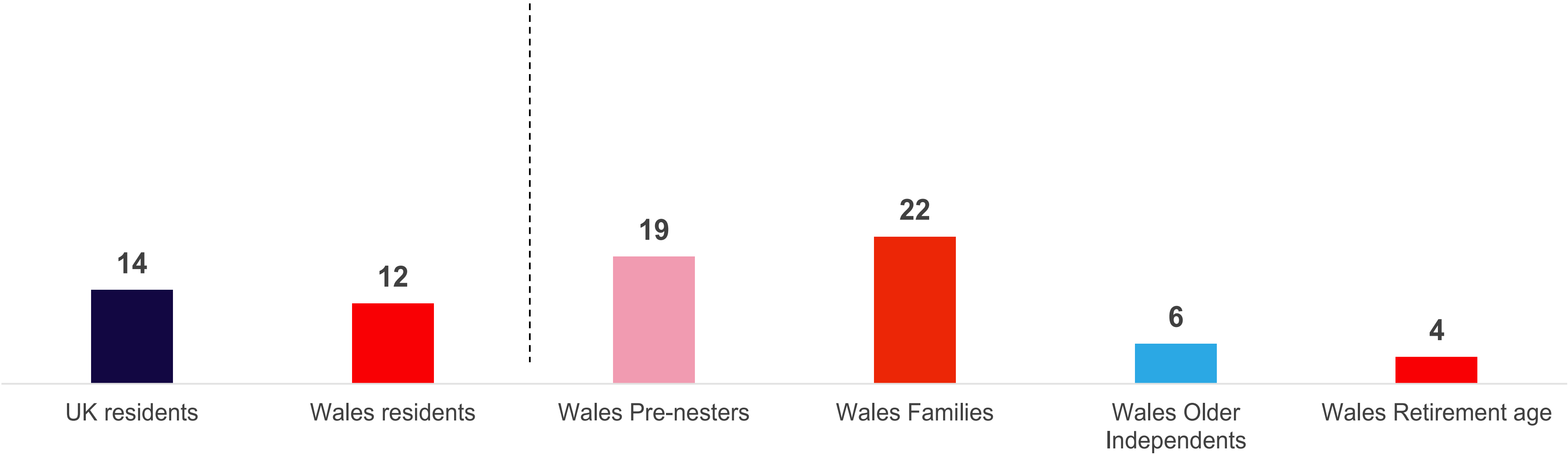
VB13c. Where in the U.K. did you stay on your most recent trip
Base: U.K. residents n=5260;. U.K. trips takers n=1501; Wales trip takers n=161

Day trips in October half-term

Intentions to take a day trip in October half-term

- 14% of U.K. residents and 12% of Wales residents anticipate taking a day-trip in the October half-term, rising to 22% amongst Wales-based families, and dropping to 6% for Wales-based older independents and 4% for Wales-based retirees. It's worth noting that the 'life Goes On' segment is also significantly more likely to take a day trip (21% intending to do so).

Figure 63. Proportion anticipating a day trip in October half-term, Percentage, Waves 14-16, U.K.

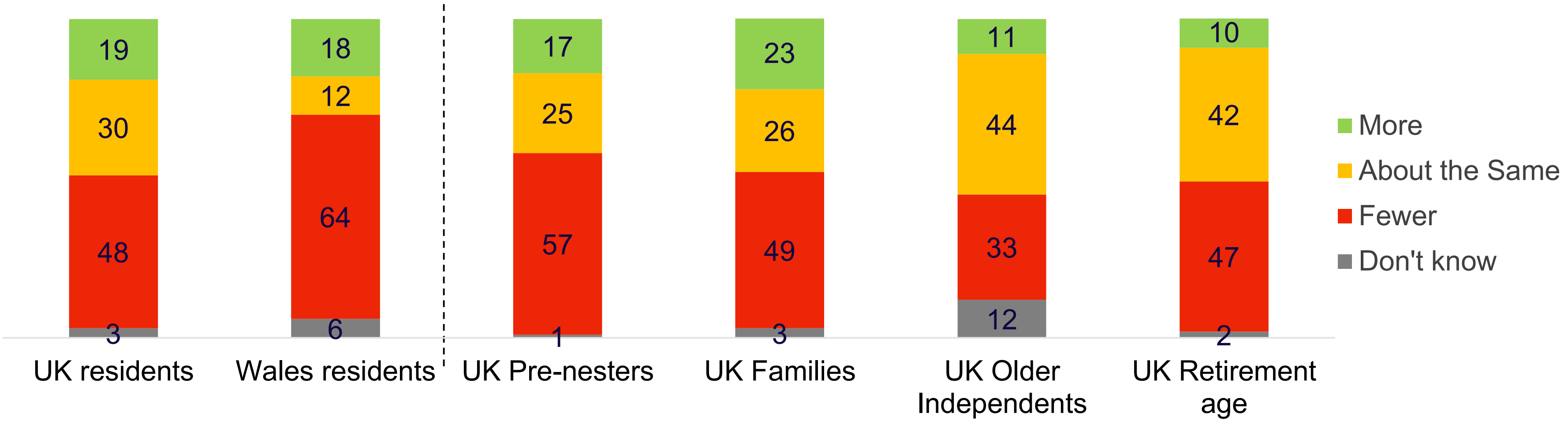


VB15a. We'd now like you to think about day trips. These are trips which last 3 hours or more but do not include an overnight stay. They also involve participating in activities you'd expect to do less frequently than once a week, so any regular trips to a gym, park or shopping centre, for example, wouldn't count. Are you intending to go on any day trips during the October school half-term period? Base: All U.K. Residents n=3498; Wales residents n=400; Wales pre-nesters n=79; Families n=126; Older independents n=138; retirement age n=57

Number of day trips in October half-term compared to normal

- Of those planning on taking a day trip in October half-term, there is an anticipation that they will take fewer day trips than 'normal'. This is particularly the case for Wales residents. Nearly half (49%) of family day-trippers intend to take fewer day trips, although 1 in 4 (23%) plan on taking more.

Figure 64. Anticipated number of October half-term day trips compared to normal, Percentage, Waves 14-16, U.K.



VB15b. Compared to normal, are you likely to take more, fewer or about the same number of day trips during the October school half-term period? Base: All intending to take a daytrip in half-term. U.K. used due to small base sizes for Wales sample U.K. residents n=498; Wales residents n=49 Pre-nesters n=100; Families n=299; Older independents n=65; retirement age n=34

Travelling for business

Intention to take an overnight business trip by March 2021

- 12% of U.K. adults in employment intend to take an overnight business trip by March 2021, 7% of Wales residents. Meetings of 1-5 people are the main reason for U.K. residents taking a business trip, larger meetings and team building the next most prevalent reasons.

Figure 65. Proportion anticipating an overnight business trip by March 2021, Percentage, Waves 14 + 16, U.K.

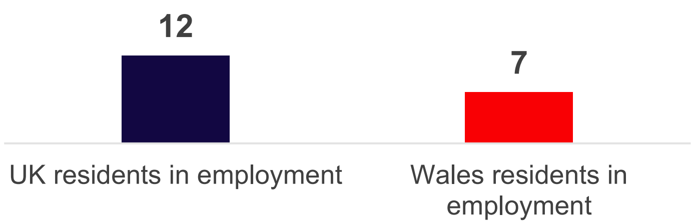
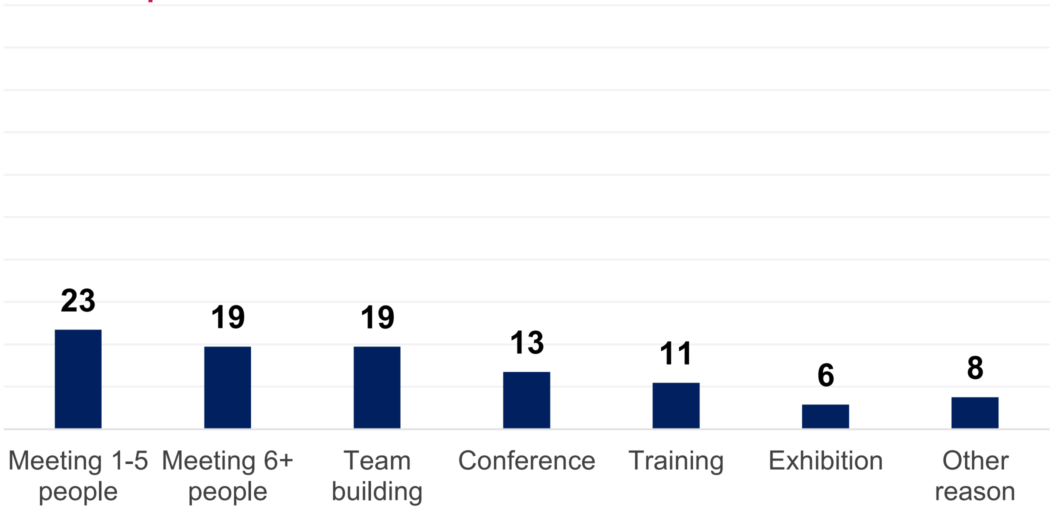


Figure 66. Reasons for taking an overnight business trip , Percentage Waves 14 + 16, U.K. residents intending to take a business trip

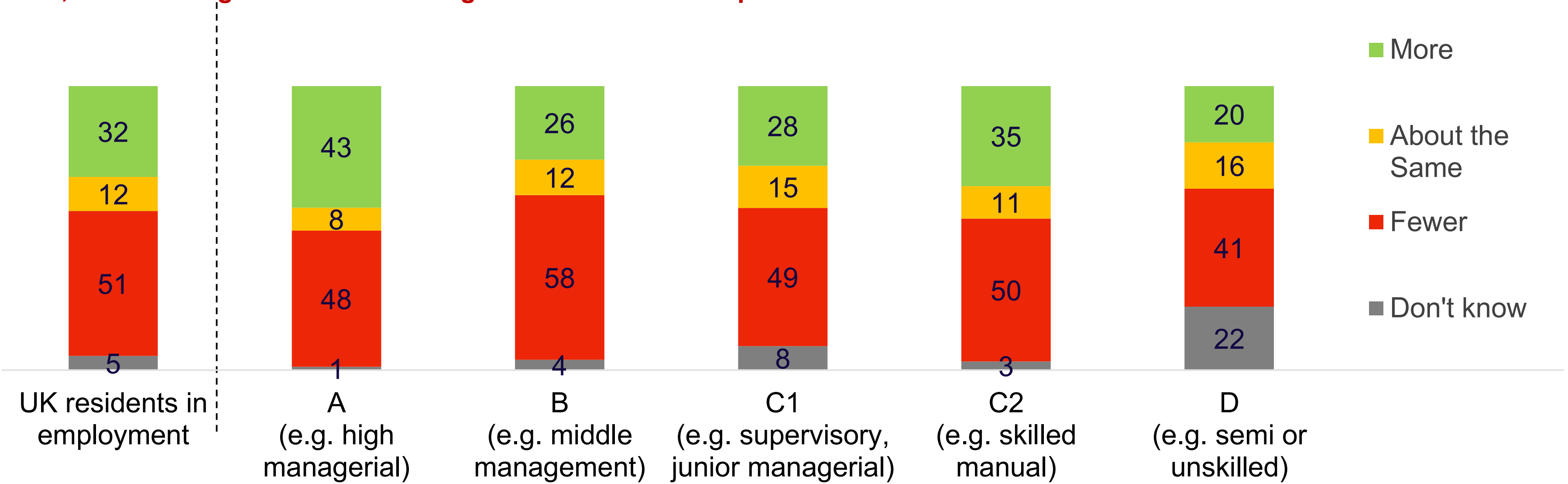


VB14a. Now looking ahead, are you intending to take any overnight business trips in the U.K. between now and March 2021? VB14b. What would be the main reason for this overnight business trip? Base: All in employment: U.K. residents in employment n=2619; Wales residents in employment n=293. U.K. residents taking a trip n=317

Anticipated number of overnight business trips compared to normal

- U.K. adults who are planning an overnight business trip anticipate fewer trips compared to normal between now and the end of the year. Notably, those in 'higher managerial' roles anticipate taking almost as many overnight business trips as normal.

Figure 67. Anticipated number of overnight business trips compared to normal, Percentage Waves 14 + 16, U.K. working residents intending to take a business trip

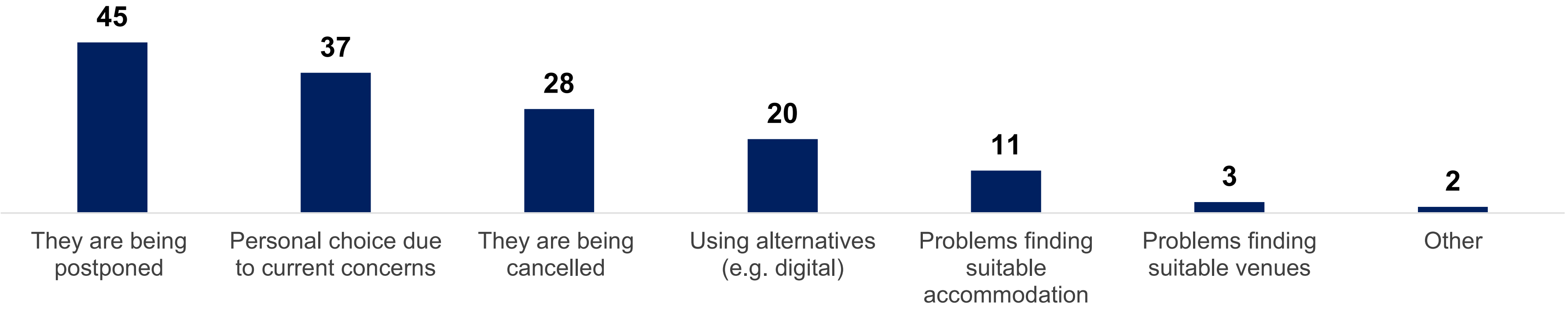


VB14c. Compared to normal, are you likely to take more, fewer or about the same number of overnight business trips between now and the end of the year? Base: All in employment planning on taking business trips by the end of the year: U.K. residents in employment n=317; A n=76; B n=100; C1 n=57; C2 n=69; D n=15

Reason for taking fewer overnight business trips

- ‘Postponement’ is the main reason that there is a perception of taking fewer overnight business trips, 45% saying this, with cancellation a reason for 28%. Nearly 2 in 5 are *choosing* to take fewer trips, due to concerns around COVID-19. Notably 1 in 5 have switched to digital alternatives.

Figure 68. Reason for taking fewer overnight business trips, Percentage Waves 14-16, U.K.



VB14d. Which, if any, of the following factors are contributing to you feeling that you’ll be taking fewer overnight business trips? Base: All in employment taking fewer business trips: U.K. residents in employment taking fewer business trips n=165

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 Waves 14-16 of the COVID-19 consumer weekly tracker.