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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2020 (Waves 22-25)

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

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Introduction

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VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the 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 2020

The findings in this report are based on data from Waves 22-25. This is based on fieldwork taking place during the following dates:

- **Wave 22: 17th December to 23rd December 2020**
- **Wave 23: 11th January to 19th January 2021**
- **Wave 24: 25th January to 29th January 2021**
- **Wave 25: 8th February to 13th February 2021**

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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 Wales Spring Intenders:** Members of the public who state their next U.K. holiday or short break will be in Wales between March and June 2021.
- **All Wales Summer Intenders:** Members of the public who state their next U.K. holiday or short break will be in Wales between July and September 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 the vaccine on trip-taking, we have created two 'vaccine groups'

- **Retirees that have received the vaccine**
- **Retirees that have not received the vaccine**

The focus on retirees is to understand the impact of taking the vaccine on leisure behaviour without 'age-related' factors skewing results. That said, please note age biases may exist (older, less active retirees being more likely to have had the vaccine than younger, more active retirees).

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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 six attitudinal segments produced to understand how audiences differ attitudinally in relation to COVID-19. These are defined below:

- **Struggling:** Hit hard by COVID-19, active decisions about financial risk or aspirational spending are a luxury that they cannot afford - the funds simply aren't available.
- **Currently constrained:** Worry about COVID-19 has a brought a temporary halt to globe-trotting for these financially confident and ambitious early adopters.
- **Cautious but content:** Concerned about COVID-19 but generally settled and content with a restrained life-style. Risk, luxury and high-end aspirations do not feature for these steady state individuals.
- **Protective but Pragmatic:** Characterised by everything in moderation across spending finance and leisure time; an approach that reflects their attitude to COVID-19 and the need to balance the health of the nation with the health of the economy.
- **Life goes on:** Protecting the economy should now be the focus for these well-off individuals who are willing to 'speculate to accumulate' and pay a premium for top notch experiences. The risks of the COVID-19 virus have been overstated in their estimation.
- **Less to lose:** Spontaneous and optimistic for the future, even though their current circumstances are fairly limiting. They believe that we should learn to live with COVID-19. Foreign travel will be back on the cards once restrictions are lifted or budgets allow.

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Key findings

Key findings (1)

The national mood and travel confidence

1. In the latest fieldwork period (late February 2021), U.K. adults are more likely to state ‘the worst has passed’ than ‘the worst is still to come’ for the first time since May 2020. This increased optimism follows a December and January that reported higher pessimism that was only exceeded at the start of the first lockdown in March to April 2020.
2. A more positive outlook coincides with increasing comfort levels conducting everyday activities such as shopping, eating at a restaurant or travelling by public transport in the next month. However, despite an uptick in this sentiment, comfort levels remain significantly below those reported from Summer 2020 through to early December.
3. At 6.5 out of 10 the national mood has barely shifted since May 2020, and a majority do not expect life to return something close to normal until October this year.
4. Conservative expectations around a return to normality drive low travel confidence – it’s not until August that more than half of U.K. adults think an overnight domestic trip would go ahead. Restrictions on travel from government is the biggest influence on this low confidence, although significant proportions also cite that it is irresponsible to travel and have concerns about catching COVID-19.
5. Optimism and mood ratings are highest amongst adults of retirement age, driven by the high incidence of this life stage that have had their first dose of the COVID-19 vaccine.
6. However, the positive outlook of retirees does not yet translate to high comfort levels doing everyday activities for this life stage, or confidence in being able to take a trip – families and pre-nesters continuing to score the highest in these areas and making up the majority of travel intenders.
7. There is limited evidence that the vaccine will lead to an immediate boost in leisure behaviour. Although retirees that have had the first vaccine are more positive about the future, they report only marginally higher comfort levels with everyday activities, and are only slightly more likely to be intending to take a spring or summer trip. That said, the barriers to taking trips amongst vaccinated retirees are markedly different to amongst non-vaccinated retirees. They are significantly more likely to cite ‘it’s not responsible to travel in this period’ and significantly less likely to state ‘I have concerns around catching COVID-19’. This suggests that if government messaging starts to promote travel, their confidence may increase.

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Key findings (2)

Upcoming trip intentions

1. 15% of U.K. adults anticipate an overnight trip in the U.K. this spring, rising to 27% this summer. Wales residents are marginally less likely to anticipate a trip (14% and 24% respectively). The proportion of U.K. and Wales adults planning an overnight summer trip in 2021 is *already* higher than trip predictions for summer 2020 as of July last year.
2. Consistent with previous reporting, intention to take an overnight domestic trip in spring and summer is highest amongst 'families' and 'pre-nesters' whilst older age groups are less likely to intend to take a trip in these time periods. The less risk averse COVID segments have a higher intention to take trips in Spring, although this is less the case in the Summer.
3. The South West of England is the most popular destination for a spring and summer trip, 25% of U.K. intenders planning an overnight trip there in Spring, and 27% in summer. Wales is an intended destination for 9% in spring and 10% in summer. However, only a minority have already booked their trip in either period, so there is potential for the destination of choice to change.
4. Nearly half of spring and summer intenders living in Wales are likely to stay in Wales for their overnight trip, around 3 in 10 planning to travel to the South West of England. This clearly highlights the importance of reaching out to the local market. That said, the vast majority of Wales intenders continue to come from outside Wales – the North West of England and the West Midlands the regions with the highest propensity to visit.
5. People intending to visit Wales in both the spring and summer are more likely than the U.K. population (and U.K. intenders) to be families and in social grades C1C2. The incidence of trips with children or young adults is also higher, particularly in the summer where they make up 58% of parties (compared to 42% of U.K. intenders).
6. The vast majority of overnight trips to Wales in spring and summer are likely to be for a 'holiday', more so than in the rest of the U.K. where visits to friends and relatives are more prevalent. Spring trips are likely to be made up of an even mix of short breaks and longer trips, with summer trips dominated by longer trips.
7. Wales intenders in both the spring and summer are most likely to anticipate their trip being in a 'traditional coastal/seaside town', followed by 'countryside or village' and 'rural coastline'. U.K. intenders are significantly more likely to intend to visit a 'city or large town'.

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Key findings (3)

8. A full range of accommodation types are being considered by Wales Spring Intenders, but in the Spring ‘caravan/camping’ dominates – at 51%, it is 21 percentage points higher than the next preferred option of ‘commercial self-catering’. The high incidence of summer camping trips is driven by a desire to stay in a ‘static caravan’, ‘glamping/alternative accommodation’ and ‘tent’.
9. Average predicted spend is consistent amongst Wales Spring and Summer intenders at £738 and £748 respectively. Despite a comparatively lower incidence of visits to friends and family, the average spend of Wales trips is lower than U.K. trips, particularly in the summer period.
10. The high incidence of social grades C1C2, a strong preference for good value accommodation types and lower anticipated average spend hints at price- sensitive Wales trip intenders, underlined by ‘free cancellation’ being the most important condition of booking accommodation this spring.

Business trips

1. 7% of U.K. adults in employment intend to take an overnight business trip by June 2021, compared to 5% of working adults living in Wales. ‘A meeting’ is the most prevalent reason for an overnight trip (meetings of fewer than 6 people indexing higher), followed by team building.
2. U.K. adults who are planning an overnight business trip anticipate significantly fewer trips compared to normal between now and June 2021. Those in higher managerial roles are most likely to anticipate more of these trips, although ‘fewer’ trips still dominate their responses.
3. Cancellation (39%) is the main reason for overnight business trips not going ahead, significantly higher than ‘postponement’ (25%) – although together this is a reason for 55%. ‘Personal choice due to current concerns around COVID’ is the second most stated reason for fewer trips, with around 1 in 5 citing digital alternatives.

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National sentiment

Vaccine take-up and intentions

- As of mid-February, 15% of U.K. adults and 9% of Wales adults, who were surveyed, had received the first dose of a COVID-19 vaccine, rising to 44% amongst 'retirees'.
- The vast majority of the population intend to have the vaccine – around 7 in 10 as soon as they can, dropping to around 1 in 2 pre-nesters and 3 in 5 families.

Figure 1. Vaccine take-up and intentions, Percentage, Wave 25, U.K. and Wales

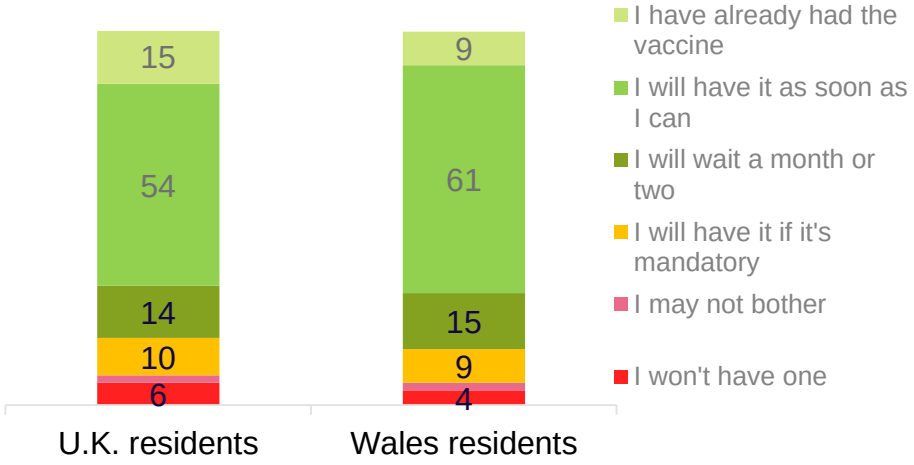
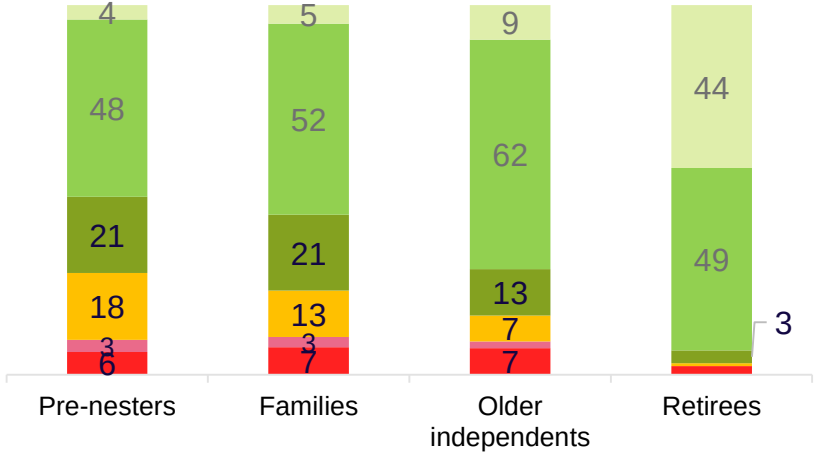


Figure 2. Vaccine take-up and intentions, Percentage, Wave 25, U.K. and Wales



Q8: How do you think you will respond when a vaccine becomes available? Base: All U.K. respondents. n=1,760; All Wales respondents n=201; Pre-nesters n=465; Families n=488; Older Independents n=463; Retirees n=341. Note: Vaccine numbers fall out naturally and may not reflect government figures. *Figures below 3% not shown

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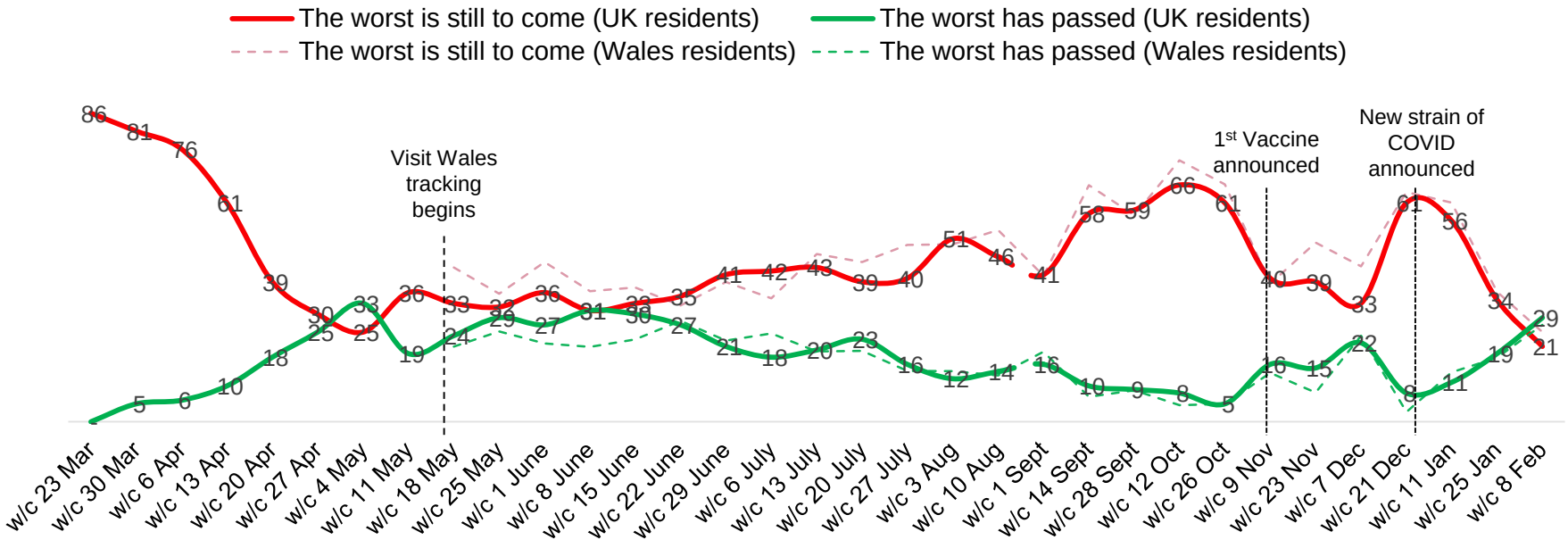
Perceptions of the situation in relation to COVID-19

- As of mid-February (Wave 25), the proportion of U.K. adults stating the 'worst has passed' was higher than those stating 'the worst is still to come' for only the second time since March 2020. The latest sentiment marks a significant shift from the pessimism of late December/early January.

Figure 3. Perception of the situation with regards to COVID-19, Waves 1-25, U.K. and Wales



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=c.1,750. All Wales respondents n=c.200

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Perceptions of the situation in relation to COVID-19

- Retirees are the life stage most likely to believe 'the worst has passed', 31% stating this compared to 24% on average. 'Retirees that have had the COVID vaccine' are the most optimistic, 38% believing 'the worst has passed' compared to 27% of 'retirees that have not had the vaccine'. Welsh residents are slightly more likely to believe the worst is still to come.

Figure 4. Perception of the situation with regards to COVID-19, Waves 24-25*, Percentage U.K. and Wales

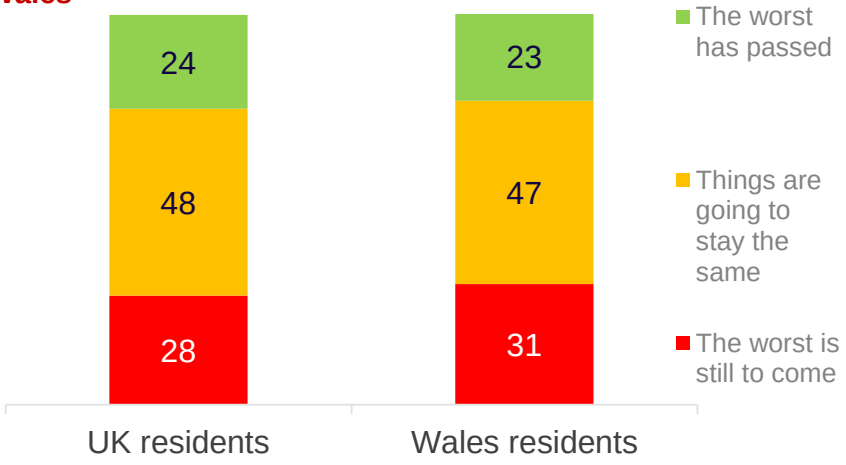
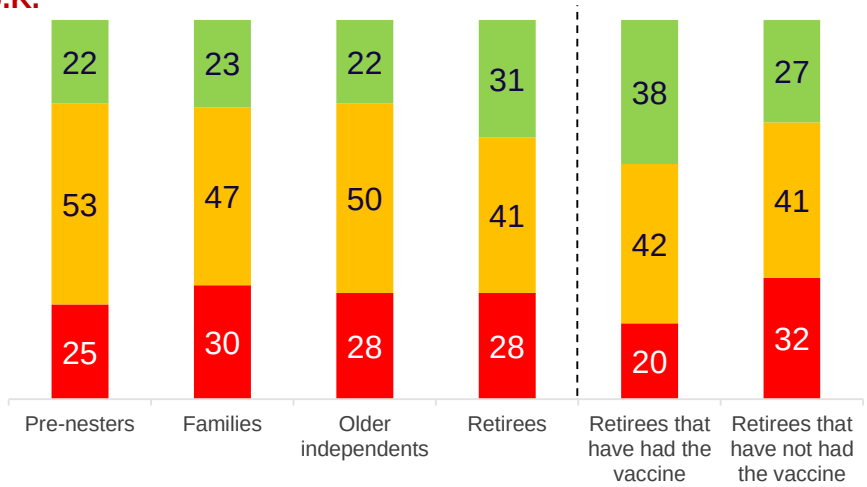


Figure 5. Perception of the situation with regards to COVID-19 by life stage, Waves 24-25, Percentage, U.K.



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=3,518; All Wales respondents n=409; Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458 *Two waves combined to produce larger base sizes

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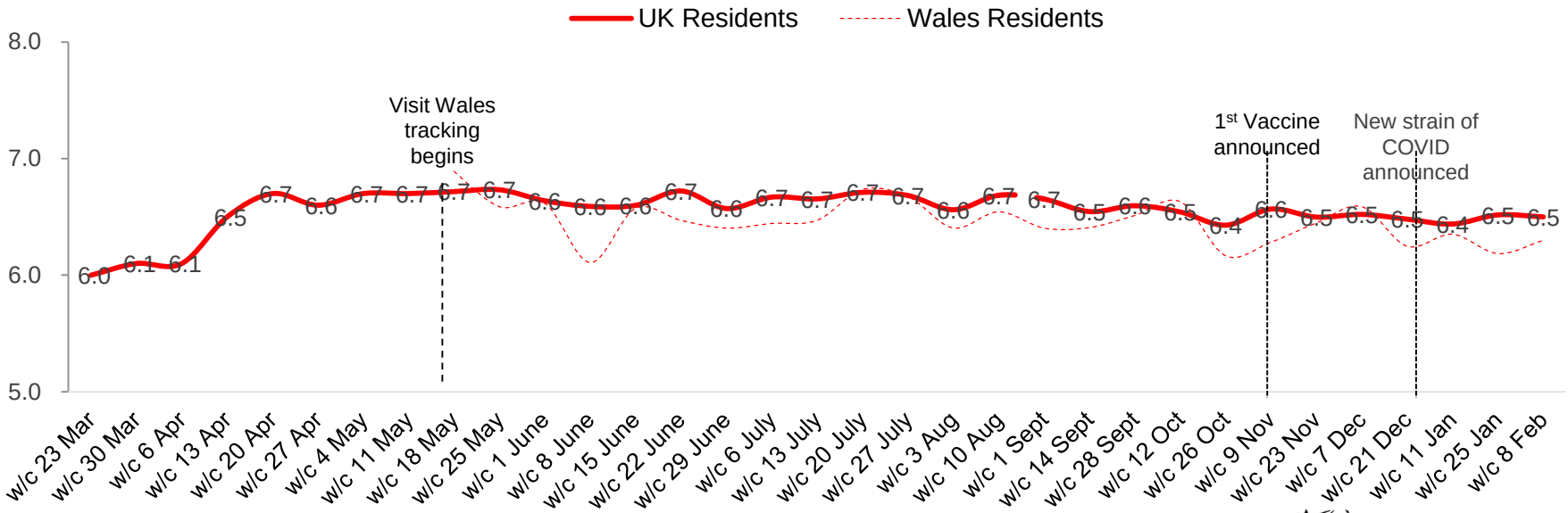
The national mood

- After a slump in March 2020, the national mood has remained relatively stable since mid-April – U.K. residents tending to score their mood in between 6.4 and 6.7 (Wales residents' mood fluctuates more but this will partly be driven by lower survey sample base sizes). Although national announcements tend to impact optimism (see previous slides), they have a minimal impact on mood.

Figure 6. Current mood out of 10, Waves 1-25, Average, U.K. and Wales



Q5: How would you rate, between 0 and 10, your mood today? Base: All U.K. respondents. n=c.1,750. All Wales respondents n=c.200

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The national mood

- Retirees have consistently reported the highest mood throughout the pandemic, despite their higher risk levels associated with COVID-19. This remains the case in the latest wave of research, the 'retiree' life stage most likely to score their mood as 7-10 out of 10. Despite exhibiting greater optimism, retirees that have had the vaccine are no more likely than retirees that have not had the vaccine to score their mood as 7-10 out of 10. That said, they are less likely to score their mood as 0-4 out of 10. Pre-nesters display a lower mood than the other segments.

Figure 7. Current mood out of 10, Percentage, Waves 24-25, U.K. and Wales

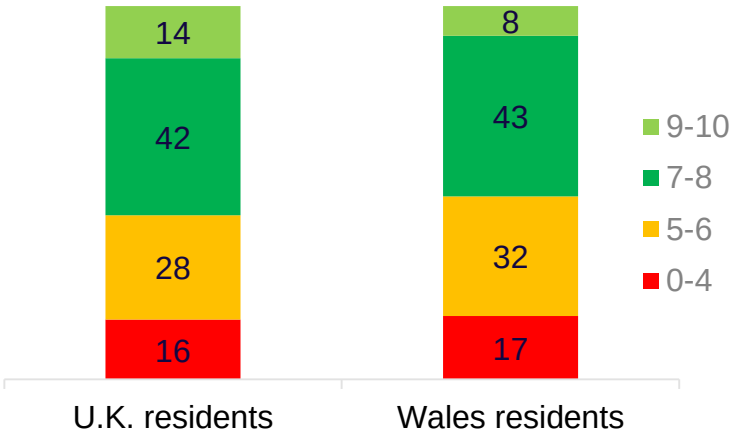


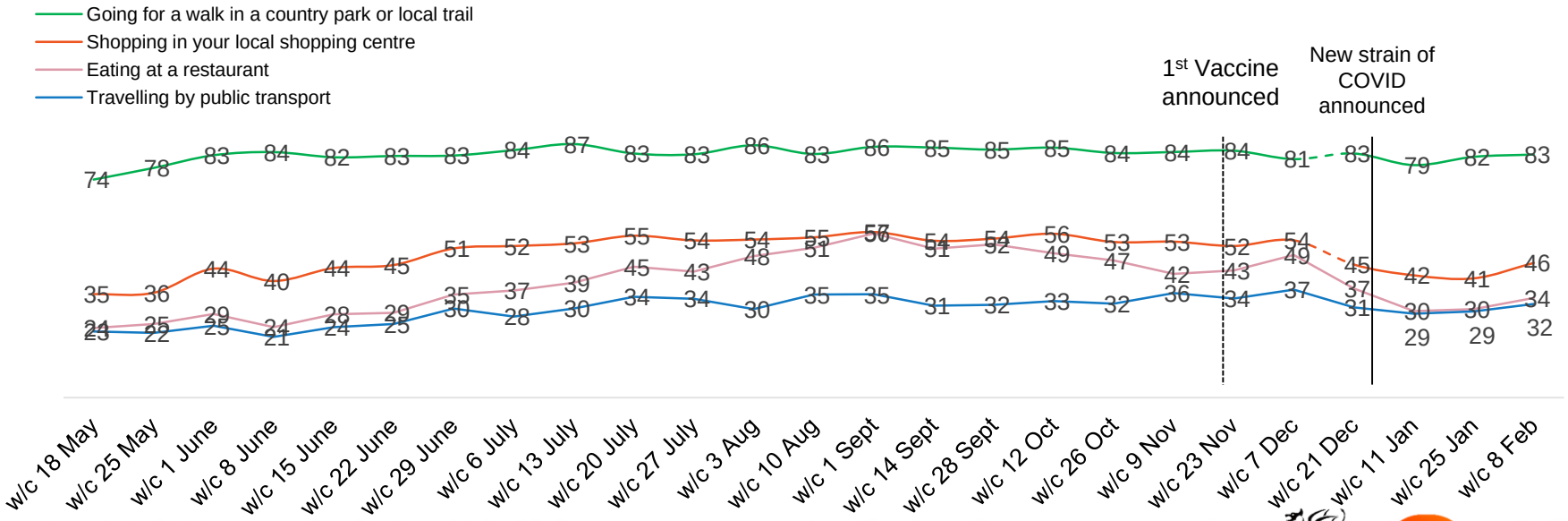
Figure 8. Current mood out of 10 by life stage, Percentage, Waves 24-25, U.K.

Q5: How would you rate, between 0 and 10, your mood today? Base: All U.K. respondents. n=3,518; All Wales respondents n=409; Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

Level of comfort undertaking activities

- Comfort levels with 'going for a walk in a country park or local trail' have remained consistently high throughout the pandemic, dropping below 80% on only three occasions. In the most recent wave, 83% are comfortable doing this activity.
- Comfort with indoor activities has fluctuated – having steadily risen from May, they peaked and stabilised from summer 2020 (Wave 13) up until early December when they dropped significantly following announcements of a new strain of COVID and a new lockdown. The latest figures suggest comfort is beginning to rise again.

Figure 9. Level of comfort conducting individual activities, Net very and fairly comfortable, Percent, Waves 1-25, U.K.

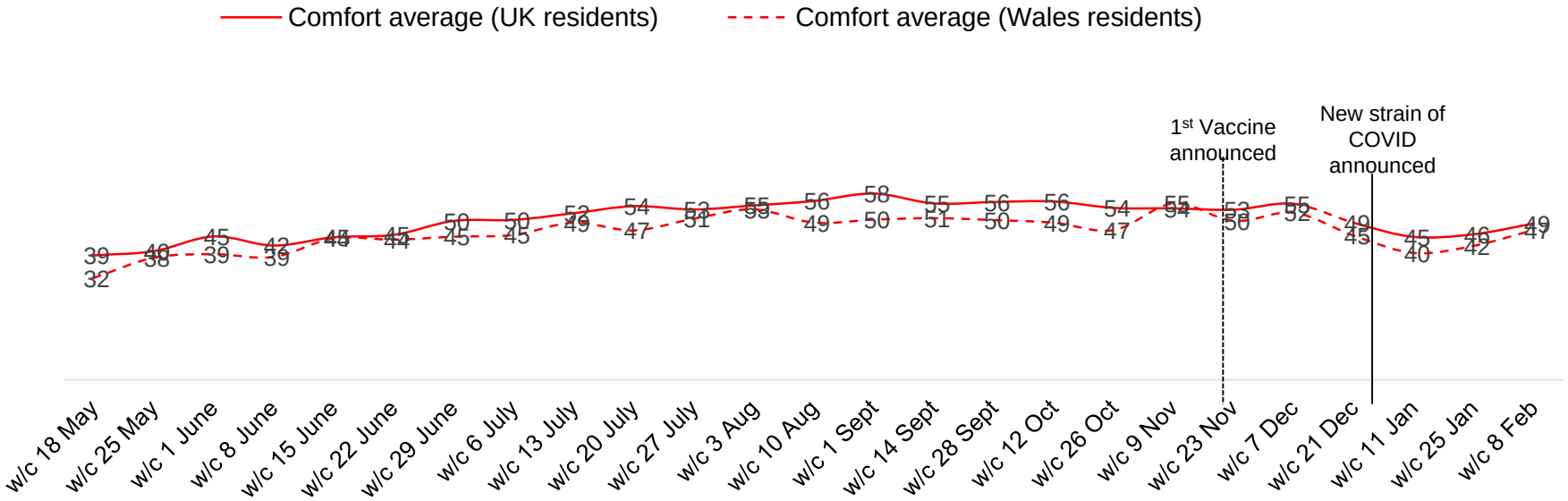


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=c.1,750.

Level of comfort undertaking activities with a 'comfort average'

- The comfort average underlines the fluctuations with indoor activities. It's notable that comfort levels in Wales tend to track below levels across the whole of the U.K. The latest figures suggest comfort is beginning to rise again after dipping at the start of the lockdown in January 2021.

Figure 10. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-25, 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=c.1,750. All Wales respondents n=c.200

Level of comfort undertaking activities with a 'comfort average'

- Despite being the life stage with the most optimism and highest mood rating, retirees are the least likely to feel comfortable doing everyday activities, particularly 'eating at a restaurant' and 'travelling by public transport'. The comfort levels of older independents – who do not exhibit high optimism or mood levels - are also relatively low.
- It's notable that retirees that have had the vaccine are only marginally more likely to feel comfortable with 'everyday activities', but show higher confidence for eating at a restaurant and travelling by public transport.

Figure 11. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Waves 24-25, U.K.

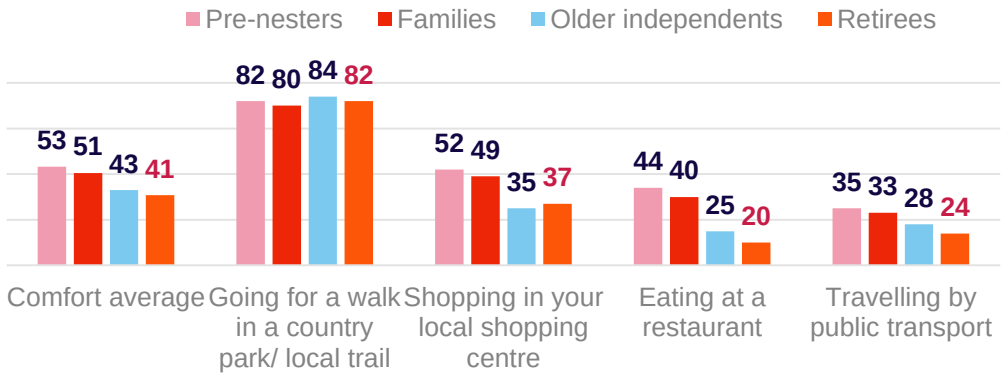
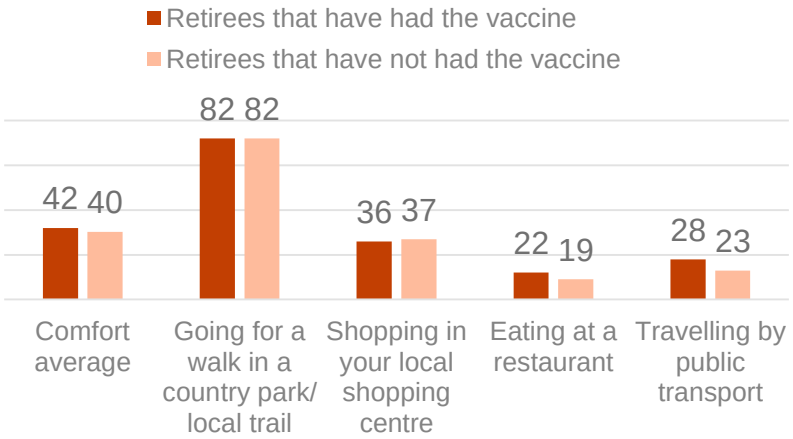


Figure 12. Level of comfort conducting activities by vaccine status, Net very and fairly comfortable, Percent, Waves 24-25, U.K.



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

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Perceptions of when things will return to normal

- Only 1 in 4 (24%) of the population expect life to return 'something close to normal' by July this year, rising to 31% by August and 42% by September. It isn't until October to December that a majority anticipate some level of normality.
- Perceptions of when normality will return amongst life stages tends to mirror comfort levels – pre-nesters and families more likely to predict normality by July. It's notable that 'retirees that have had the vaccine' anticipate normality sooner than retirees that have not had the vaccine.

Figure 13. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Waves 24-25, UK and Wales

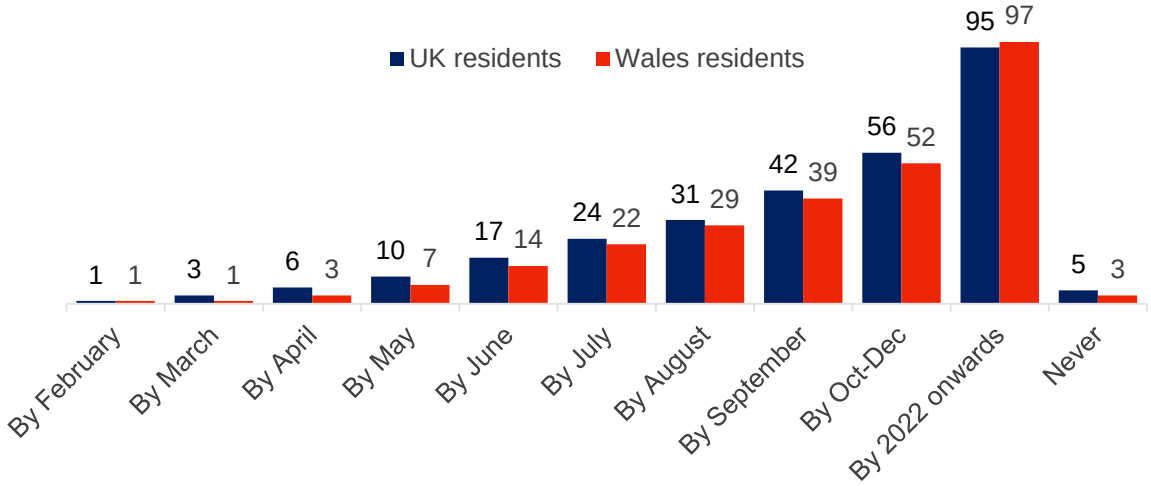

Table 1. Normality by July by sub-group

Audience	%
Pre-nesters	29%
Families	31%
Older independents	18%
Retirees	19%
Retirees that have had the vaccine	22%
Retirees that have not had the vaccine	17%

Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All U.K. respondents. n=3,518; All Wales respondents n=409; Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

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

- Around 3 in 5 of the U.K. population and around two thirds of the Wales population fall into COVID segments that are concerned or have been impacted by the pandemic (cautious but content, currently constrained and struggling). The picture varies markedly by life stage – younger life stages far less likely to fall into the concerned or impacted segments. 'Pre-nesters' and 'families' are less risk averse, both dominated by the 'less to lose' segment. Vaccination has not shifted segment status amongst retirees.
- Retirees are the most likely to fall into the 'cautious but content' segment, the vaccine having minimal impact.

Figure 14. Breakdown of population by COVID segments, Percentage, Waves 24-25, U.K. and Wales

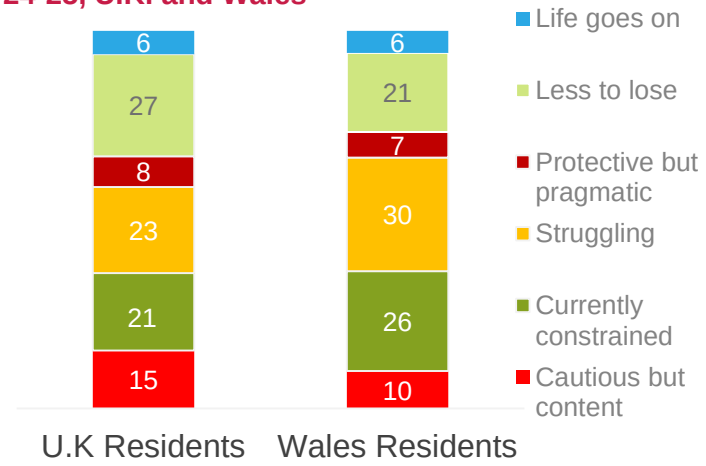
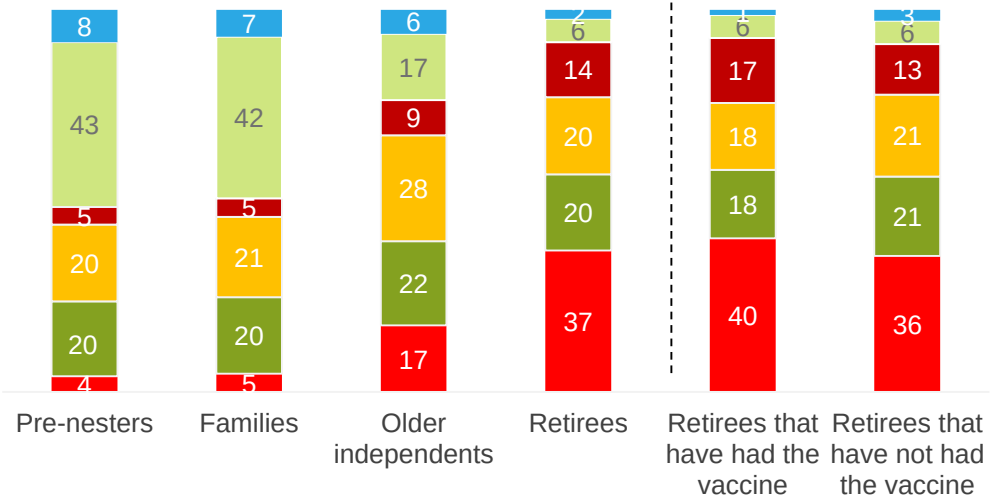


Figure 15. Breakdown of population by COVID segments by life stage, Percentage, Waves 24-25, U.K.



Base: All U.K. respondents. n=3,518; All Wales respondents n=409; Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

Financial segments and financial impact of COVID-19

- 16% of the U.K. population and 18% of the Wales population consider themselves 'hit hard financially' by the pandemic, with around 1 in 10 describing themselves as 'better off than before'. There has been minimal change in these figures since the start of the pandemic.
- Nearly half of U.K. residents and 2 in 5 Wales residents of working age have had their employment impacted by COVID-19 – furlough and reduced income the most common.

Figure 16. Breakdown of residents by financial segments, Percentage, Waves 24-25, U.K. and Wales

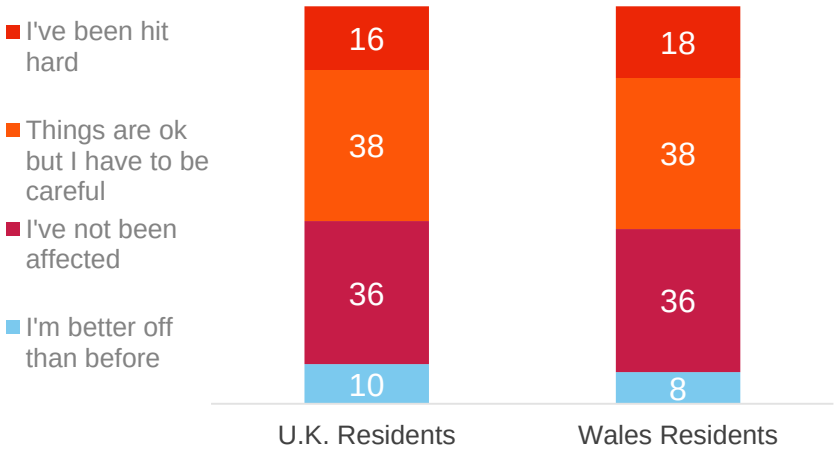
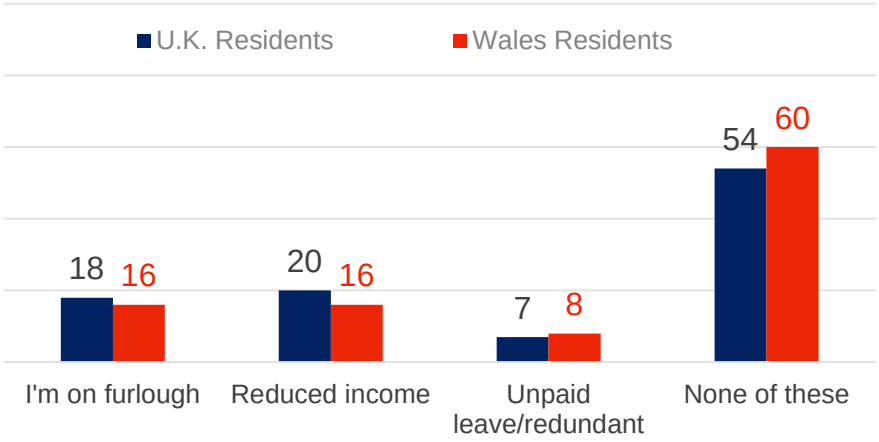


Figure 17. Employment impact of COVID-19, Percentage, Waves 24-25, U.K. and Wales of working age



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=3,518; All Wales respondents n=409

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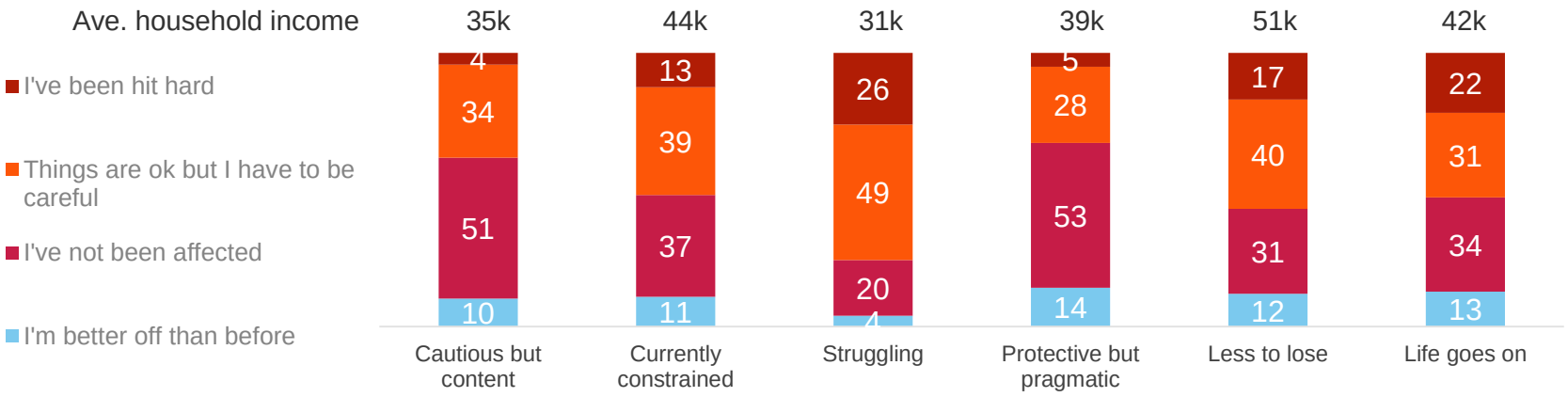
Financial segments by COVID segments

- ‘Struggling’, ‘less to lose’ and ‘life goes on’ are the segments most likely to have been hit hard financially by the pandemic. However, ‘less to lose’ and ‘life goes on’ (for whom leisure is a priority), also have relatively high household income (and around 1 in 8 are better off) suggesting their trip spend may not be impacted.

Figure 16b. Breakdown of residents by financial segments by COVID segments, Percentage, Waves 24-25, U.K.



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. Cautious but content n=757; Currently constrained n=1118; Struggling n=1220; Protective but pragmatic n=391; Less to lose n=1469; Life goes on n=325

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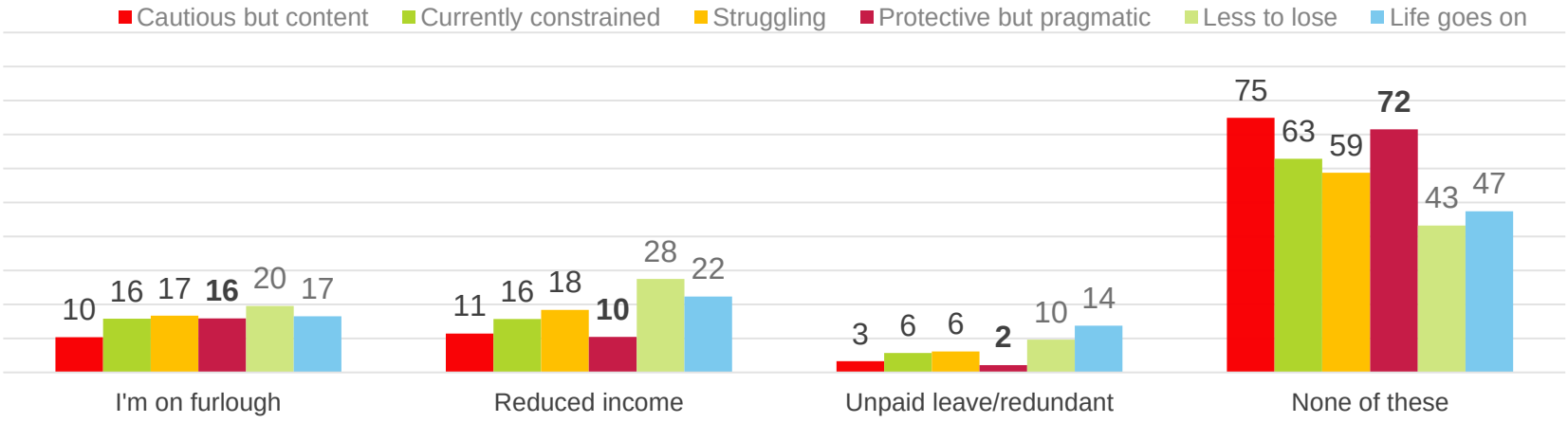
Financial impact by COVID segments

- The younger 'less to lose' and 'life goes on' segments are the most likely to have had their employment impacted by COVID-19 in some way, indexing highest on incidence of furlough, reduced income and unpaid leave/redundancy. It should be noted however, that despite these limitations, these segments report relatively high incomes, and leisure is a priority.

Figure 17b. Employment impact of COVID-19 by COVID segments, Percentage, Waves 24-25, U.K.



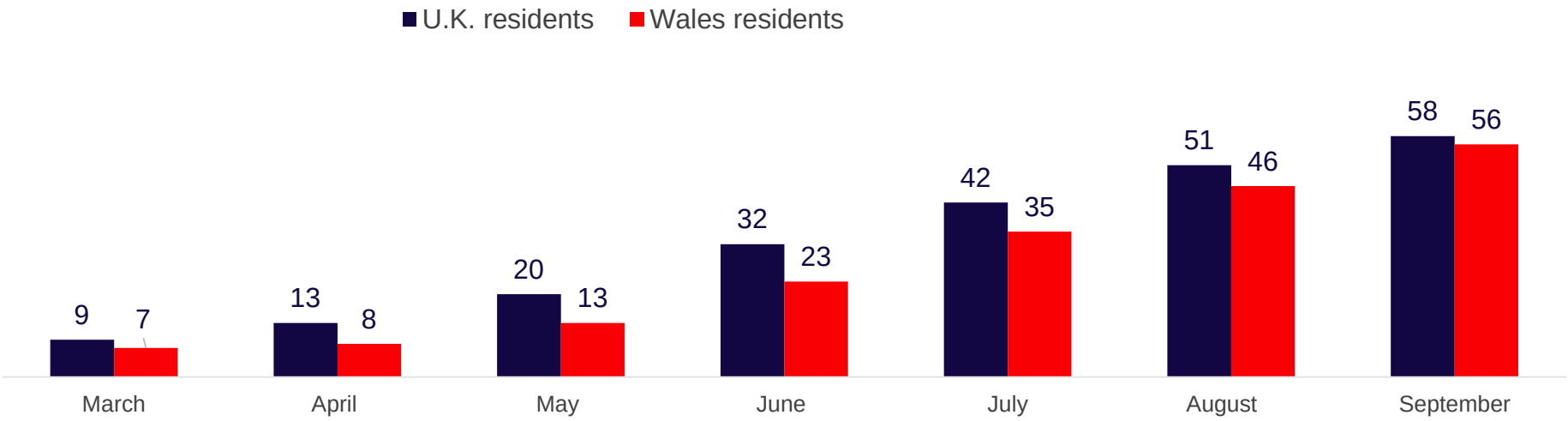
Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All U.K. respondents. Cautious but content n=757; Currently constrained n=1118; Struggling n=1220; Protective but pragmatic n=391; Less to lose n=1469; Life goes on n=325

Travel confidence

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

- Fewer than a third of U.K. adults and a quarter of Wales adults are confident that an overnight U.K. trip would go ahead at any point this Spring (March to June). Within the summer months (July to September) confidence rises, although it isn't until August that more than half of U.K. adults are confident, and not until September that a majority of Wales adults are confident.
- Wales residents are significantly less confident than U.K. residents up to August this year.

Figure 18. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Waves 24-25, U.K.

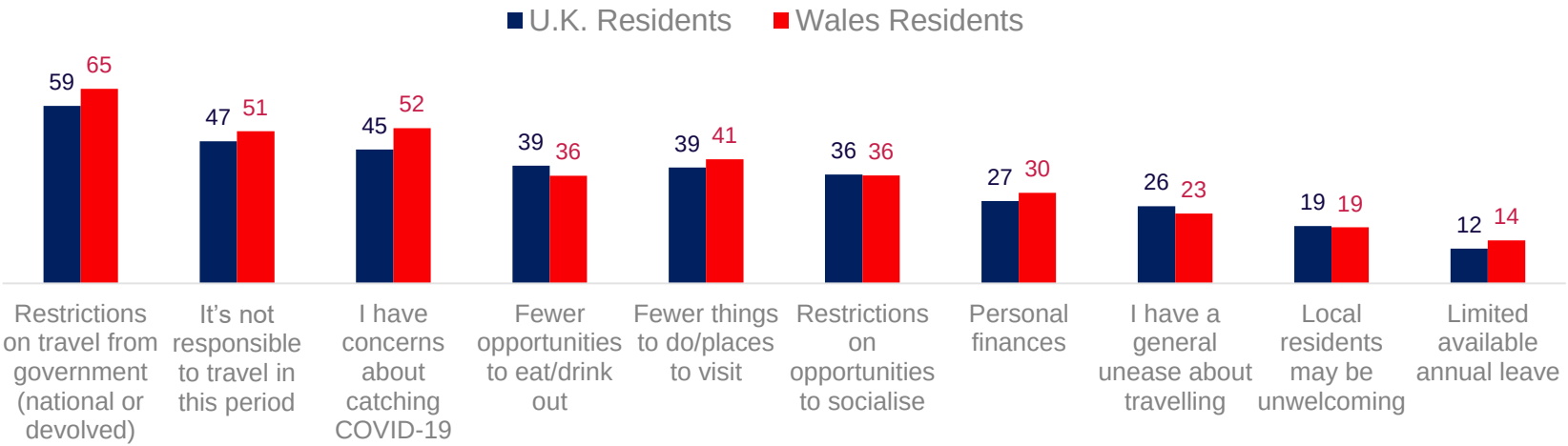


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Base: All U.K. respondents. n=3,518; All Wales respondents n=409

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

- 'Restrictions on travel from government' is the leading reason for lack of confidence in domestic overnight trips going ahead in spring 2021 amongst U.K. and Wales residents (with other restrictions-related reasons also influential). This is followed by 'it's not responsible to travel' and 'I have concerns about catching COVID-19'. Each of these reasons score higher amongst Wales residents. 'Personal finances' is a barrier for around 3 in 10.

Figure 19. Reasons for not being confident about travelling in spring (March to June), Percentage, Waves 24-25, 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: All U.K. respondents. n=1,440; All Wales respondents n=174

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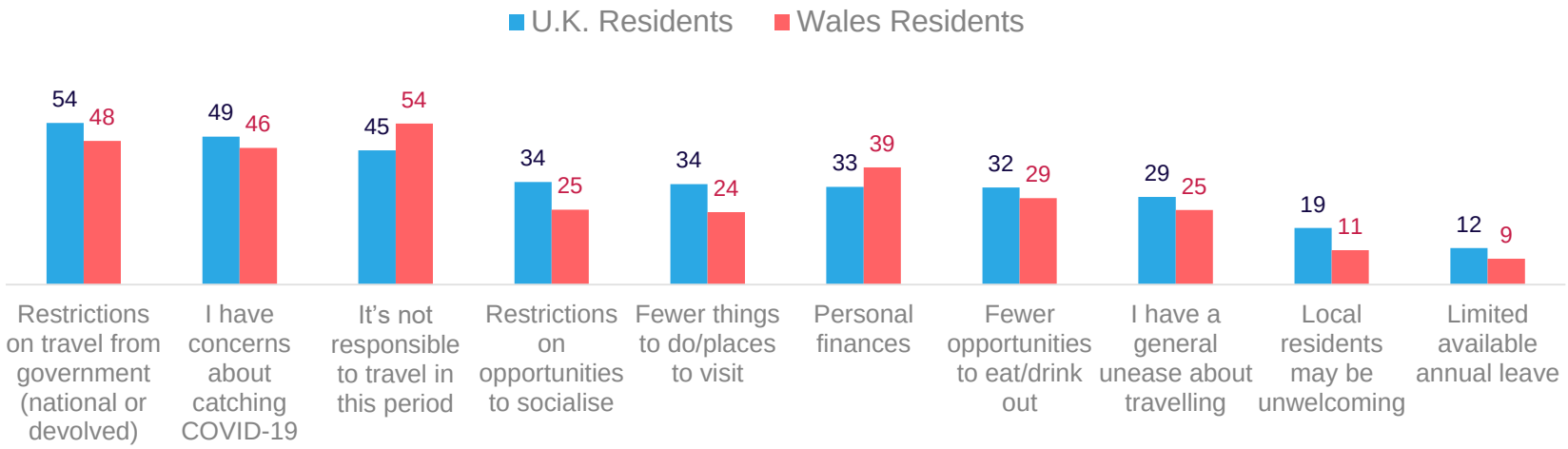
Reasons for not feeling confident taking Summer trips in the U.K.

- The top three reasons for not feeling confident about summer trips are the same as those given for spring trips – with restrictions on travel, concerns about catching Covid and it's not responsible to travel being the leading reasons. However, the incidence of each is lower than for travel in the Spring. Notably, Welsh residents are more likely to state it's not responsible to travel and personal finances as reasons for not being confident to travel in the summer.

Figure 20. Reasons for not being confident about travelling from July to September, Percentage, Waves 24-25, U.K. and Wales

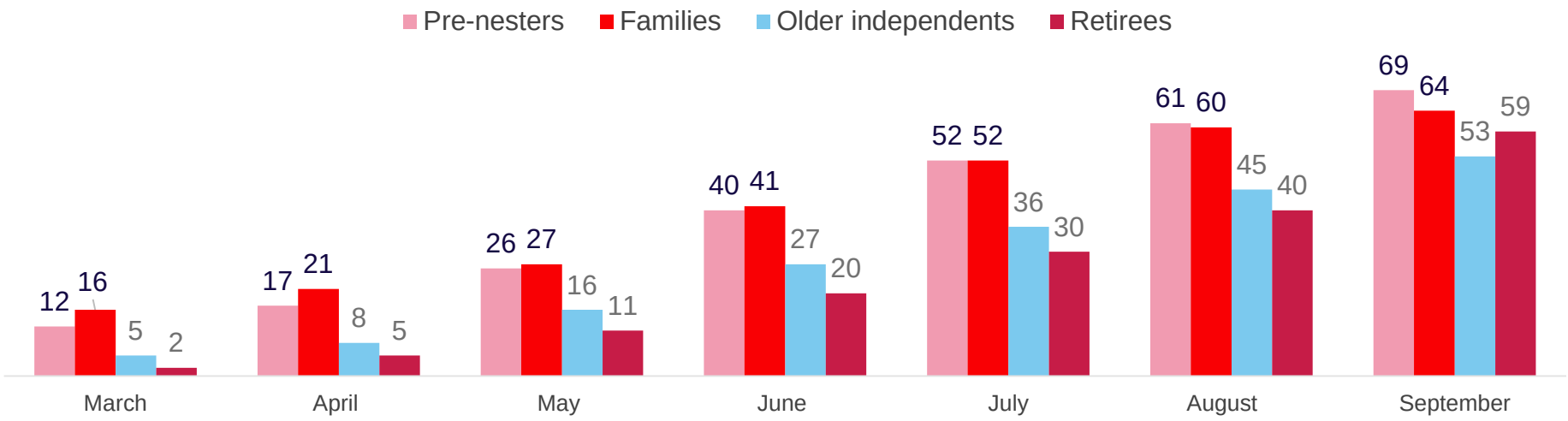


QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday between September and September? Base: All U.K. respondents. n=1,077; All Wales respondents n=127

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

- Consistent with their low comfort levels conducting everyday activities, retirees and older independents are significantly less likely than pre-nesters and families to feel confident that an overnight domestic trip would go ahead between March and September. The gap is especially large in spring, closing to some extent by September.

Figure 21. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Waves 24-25, 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?
Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658

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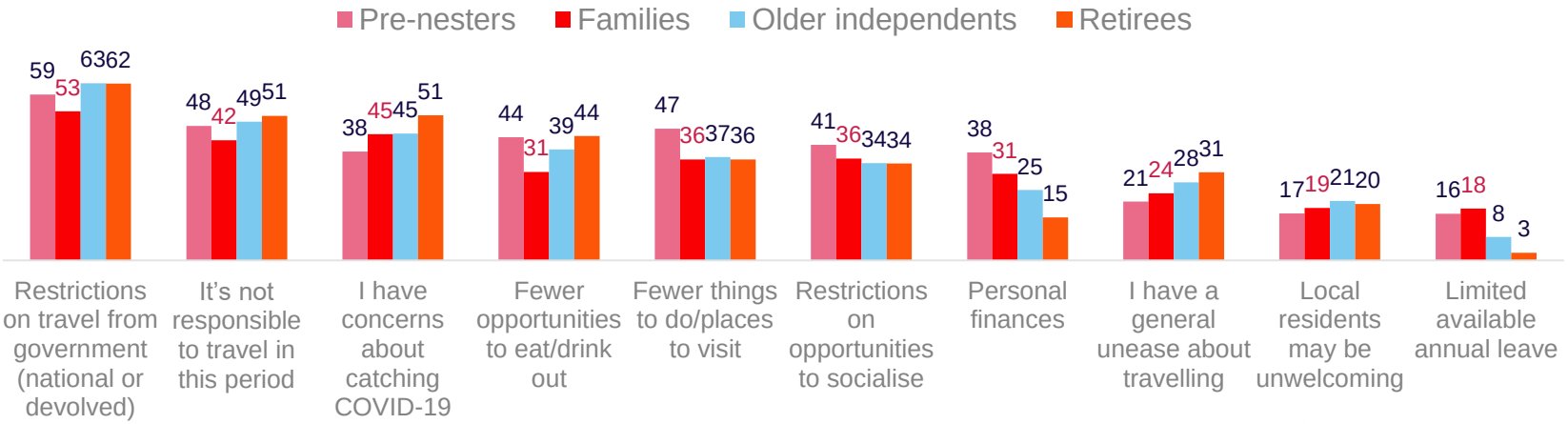
Reasons for not feeling confident taking trips in the U.K.

- All life stages cite ‘restrictions on travel from government’ as the leading reason for low confidence in domestic spring trips going ahead. However, as in previous waves, there are some differences in other reasons given. Pre-nesters are significantly more likely than other life stages to cite ‘fewer things to do/places to visit’ and ‘personal finances’; ‘retirees’ are more likely to cite ‘I have concerns about catching COVID-19’. Families are less likely to state fewer opportunities to eat/drink out as a reason for not being confident taking trips, but more likely to state limited annual leave available.
- The pattern of reasons amongst life stages are consistent between July and September.

Figure 22. Reasons for not being confident about travelling from March to June by life stage, Percentage, Waves 24-25, U.K.

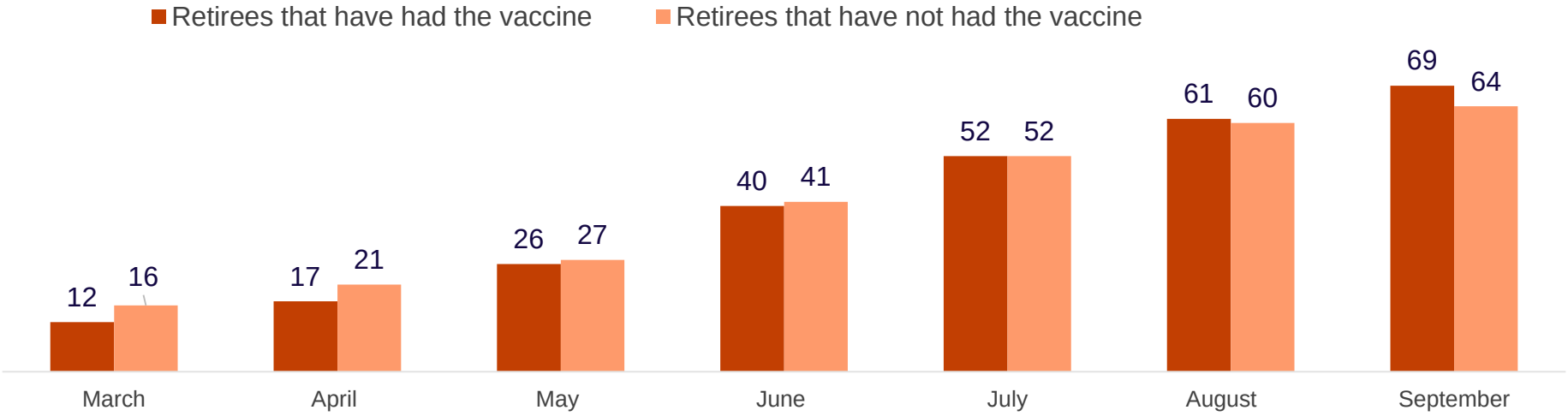


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between September and September? Pre-nesters n=255; Families n=292; Older Independents n=306; Retirees n=222

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

- Retirees that have had the vaccine are only marginally more confident that a spring domestic overnight trip would go ahead, with confidence relatively even for summer months. This further suggests that the vaccine alone will not provide an automatic boost to leisure behaviour and there is still a need to restore confidence for travel.

Figure 23. Confidence in taking a U.K. overnight trip across a range of different months by vaccine status, Net percentage very and fairly confident, Waves 24-25, U.K.

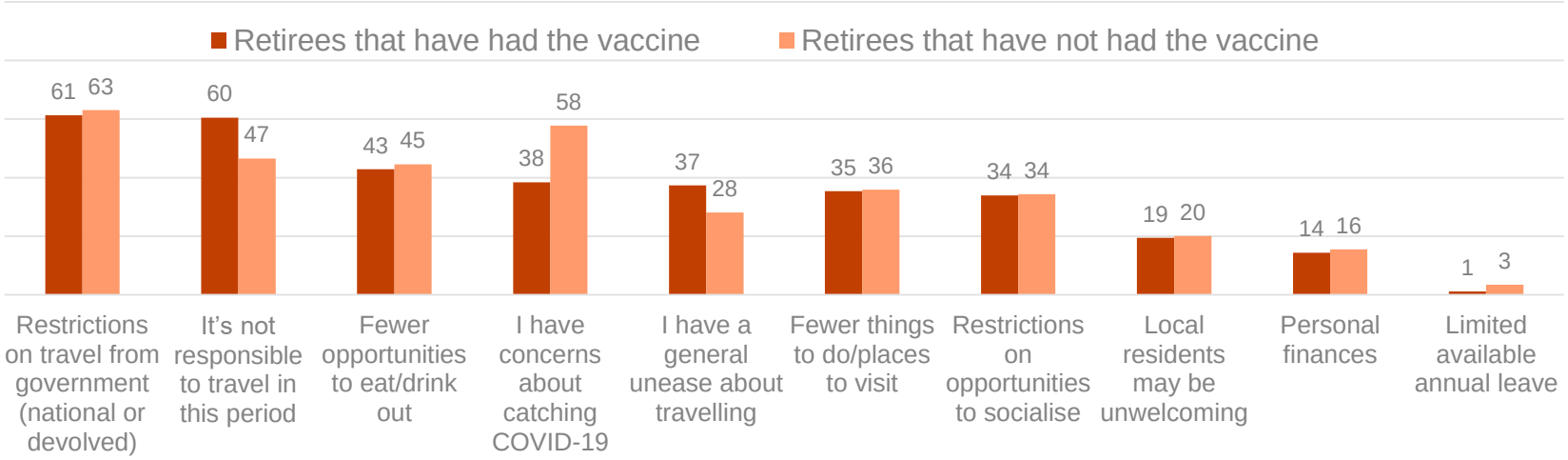


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

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

- Consistent with all other sub-groups, restrictions on travel from government is the leading reason vaccinated and unvaccinated retirees are not confident about Spring travel going ahead. However, retirees that have had the vaccine are significantly less likely to cite 'concerns about catching COVID-19' – for this audience 'it's not responsible to travel in this period' and 'I have a general unease about travelling' are more important. This *suggests* that when government restrictions are removed and messaging promotes leisure behaviour, 'vaccinated retirees' will become more confident about taking overnight trips.

Figure 24. Reasons for not being confident about travelling from March to June by vaccine status, Percentage, Waves 24-25, U.K.



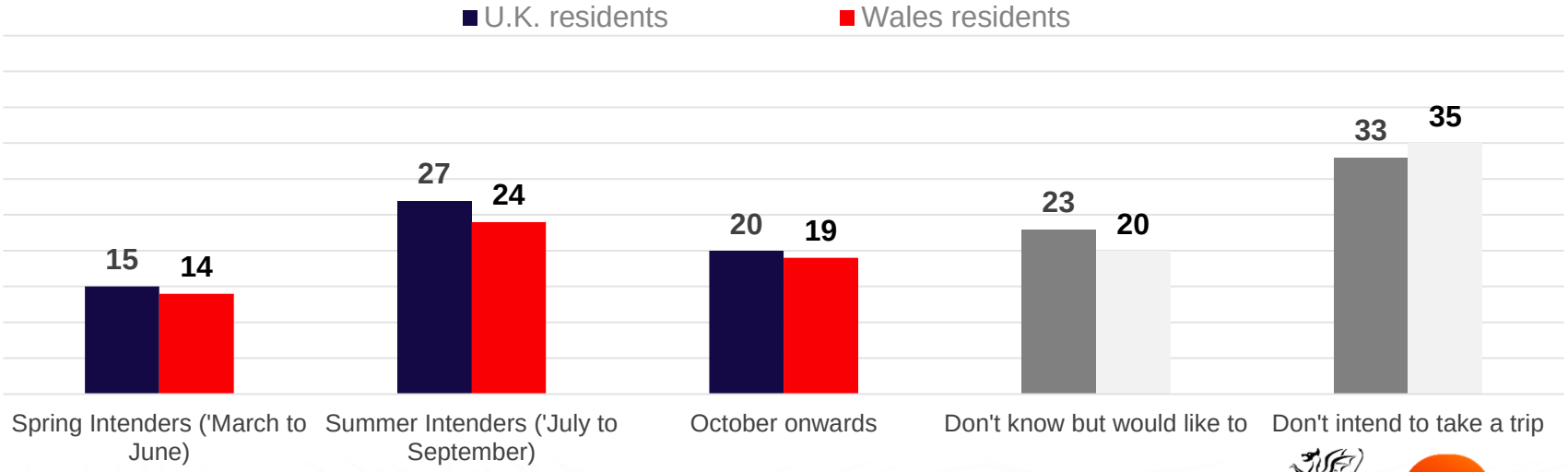
QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday between September and September? Retirees that have had the vaccine n=66; Retirees that have not had the vaccine n=156

Upcoming trip intentions

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

- 1 in 7 U.K. and Welsh adults anticipate taking an overnight U.K. trip this Spring, rising to around 1 in 4 in the summer and 1 in 5 from October onwards. Around half either 'don't know but would like to take a trip' or 'don't intend to take a trip'. It's worth noting that the proportion of U.K. and Wales adults planning an overnight summer trip this year is *already* higher than trip predictions for summer 2020 in interviews that took place in July last year.

Figure 25. Proportion anticipating an overnight U.K. trip in each time period , Percentage, Waves 24-25, 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 22-25 U.K. population n=3,518; Wales population n=409.

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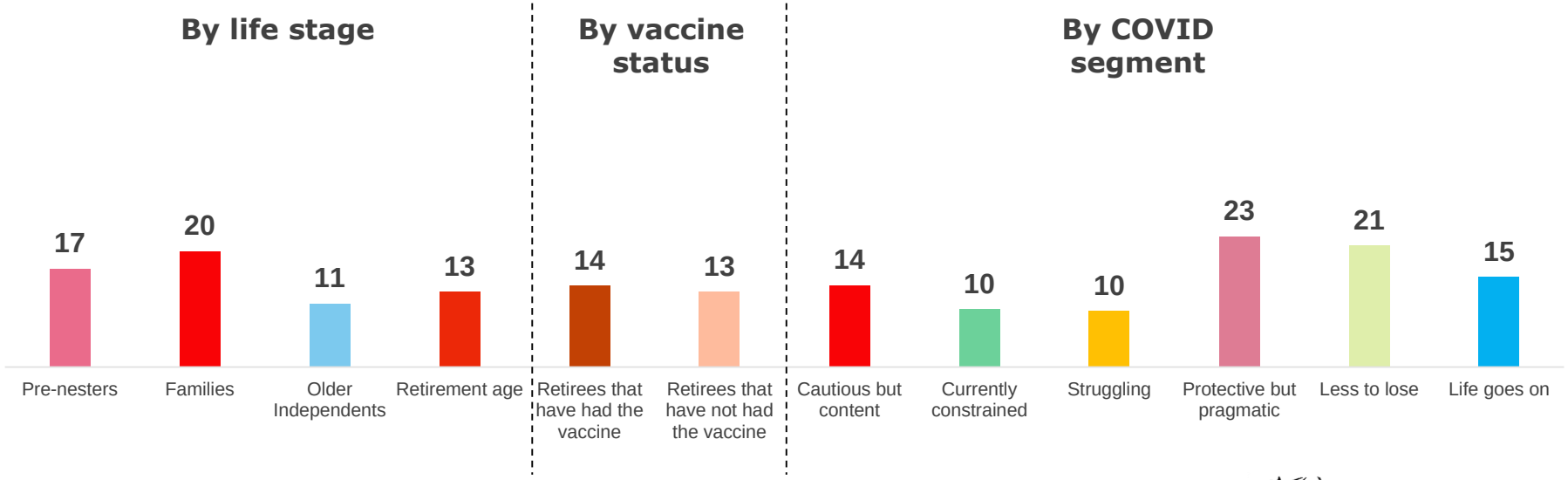
Proportion anticipating a Spring overnight trip (March to June)

- Consistent with reporting from the start of the pandemic, intention to take an overnight domestic spring trip is highest amongst 'families' and 'pre-nesters'. Having a vaccination does not appear to have boosted intention to take an overnight trip in the short-term. Protective but pragmatic, less to lose and life goes on are the three segments most likely to take a spring trip (although cautious but content are close behind).

Figure 26. Proportion anticipating an overnight U.K. trip in spring by sub-groups, Percentage, Waves 24-25, 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? Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

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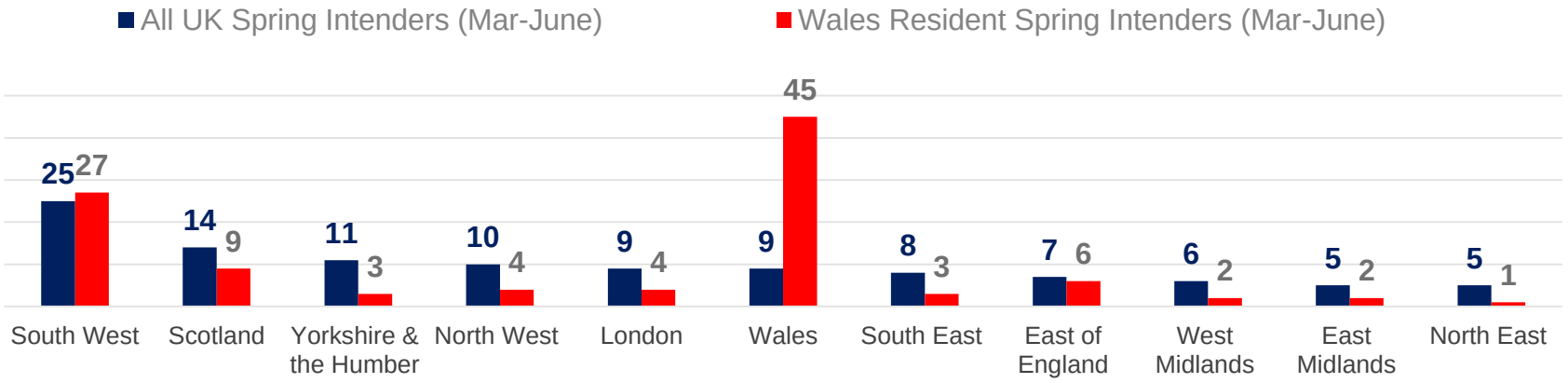
Where planning on staying on next spring U.K. trip

- The South West of England is the preferred U.K. destination for all trip intenders in spring – a position it has consistently held for the last 12 months. Wales is the preferred destination for 9% of U.K. intenders this spring, but rises to 45% amongst Wales residents planning an overnight trip in this period. The incidence of Wales intenders living in Wales is higher than any period over the last 12 months.

Figure 27. Where planning on staying on next U.K. overnight trip in spring, Percentage, Waves 22-25, 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 spring U.K. Intenders (Spring) n=1129, Wales Resident Intenders (Spring) n=117

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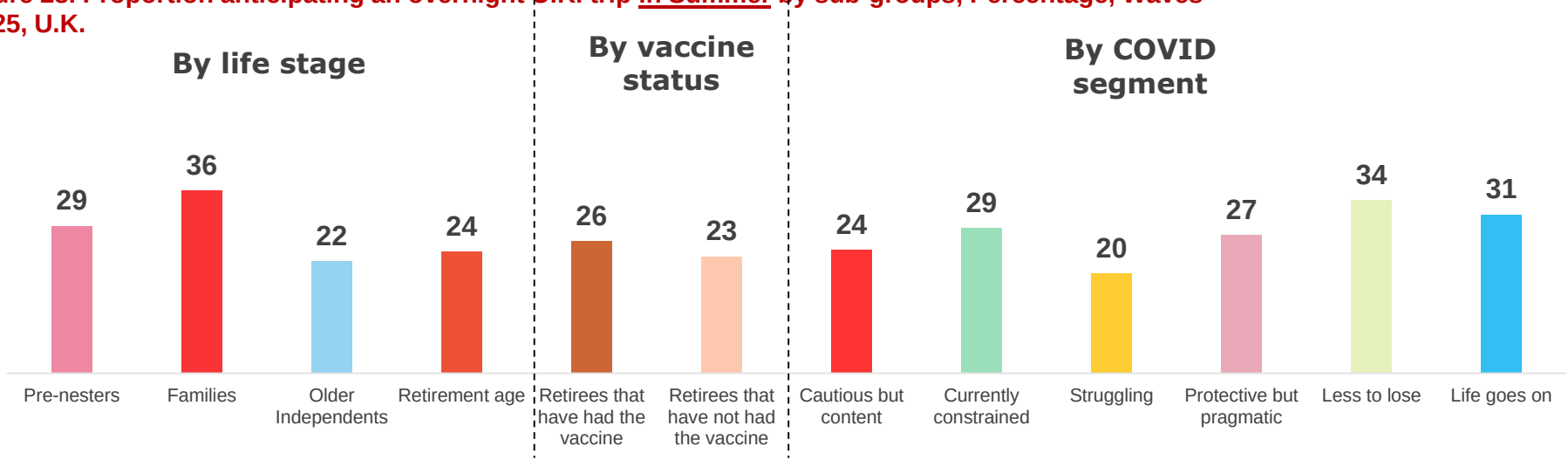
Proportion anticipating a Summer overnight trip (July to Sept)

- Similar to the spring, pre-nesters (29%) and families (36%) are the life stages most likely to intend to take a summer overnight trip, although 1 in 4 retirees and around 1 in 5 older independents plan on doing so. Retirees that have had the vaccine are marginally more likely to be planning a summer trip, suggesting the vaccine may have an influence on medium term behaviour. With the exception of 'struggling', most COVID segments exhibit relatively strong intentions to take a summer trip, further suggesting rising confidence in this period. 'Less to lose' are the most likely to take a trip.

Figure 28. Proportion anticipating an overnight U.K. trip in Summer by sub-groups, Percentage, Waves 24-25, 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? Pre-nesters n=933; Families n=981; Older Independents n=939; Retirees n=658; Retirees that have had the vaccine n=200; Retirees that have not had the vaccine n=458

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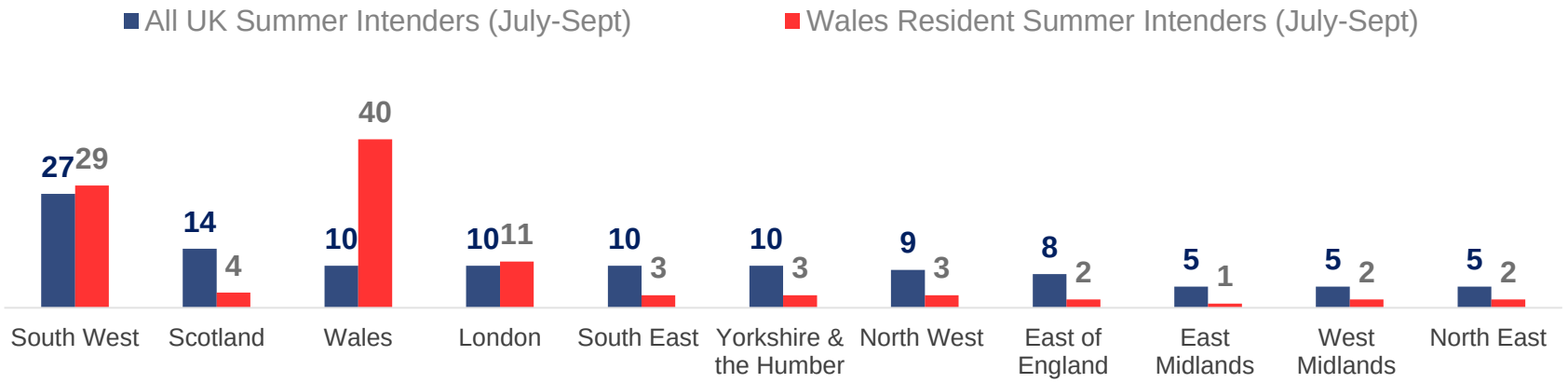
Where planning on staying on next summer U.K. trip

- The South West of England remains the preferred destination for U.K. trip intenders this summer. As in the spring, Scotland is second most preferred but the gap with the South West is 13 percentage points.
- Wales is the joint third most preferred destination in the summer months, one of four destinations with 10% intending to take a trip there, rising to 40% amongst Wales residents.

Figure 29. Where planning on staying on next U.K. overnight trip in Summer, Percentage, Waves 22-25, 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. U.K. Intenders (Summer) n=1214, Wales Resident Intenders (Summer) n=76

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Whether planned or booked holiday or short break yet

- Only 2 in 5 Spring Intenders have already planned their trip and a similar proportion (35%) have booked it, further underlining the lack of confidence in trips going ahead, and the potential for destination-switching
- A minority 1 in 7 have planned their summer trip, whilst 1 in 10 have already booked it. Planning and booking incidences amongst Wales intenders are consistent with U.K. intenders.

Figure 30. Proportion of Spring Intenders that have already *planned* their trip , Percentage Wave 25, U.K. and Wales

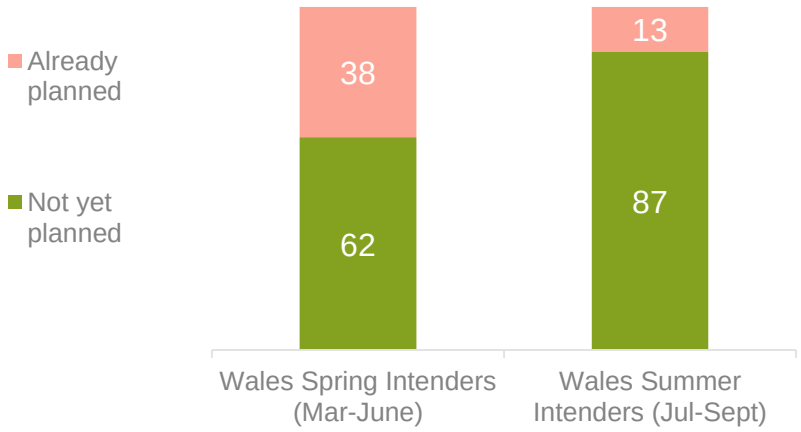
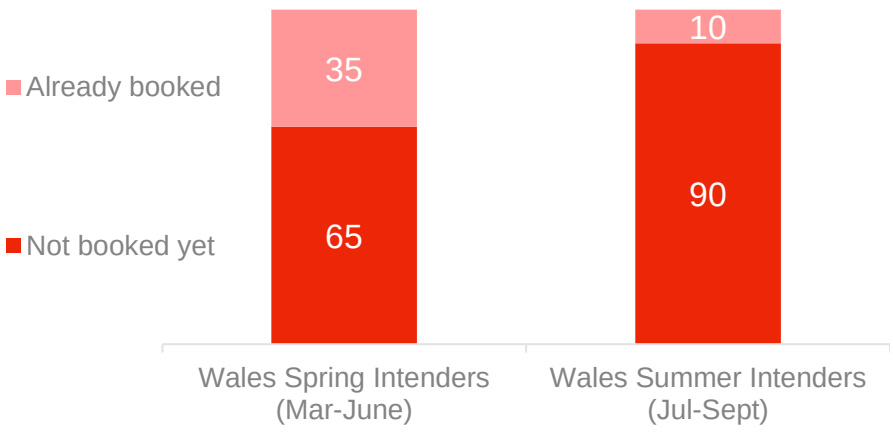


Figure 31. Proportion of Spring Intenders that have already *booked* their trip , Percentage Wave 25, U.K. and Wales

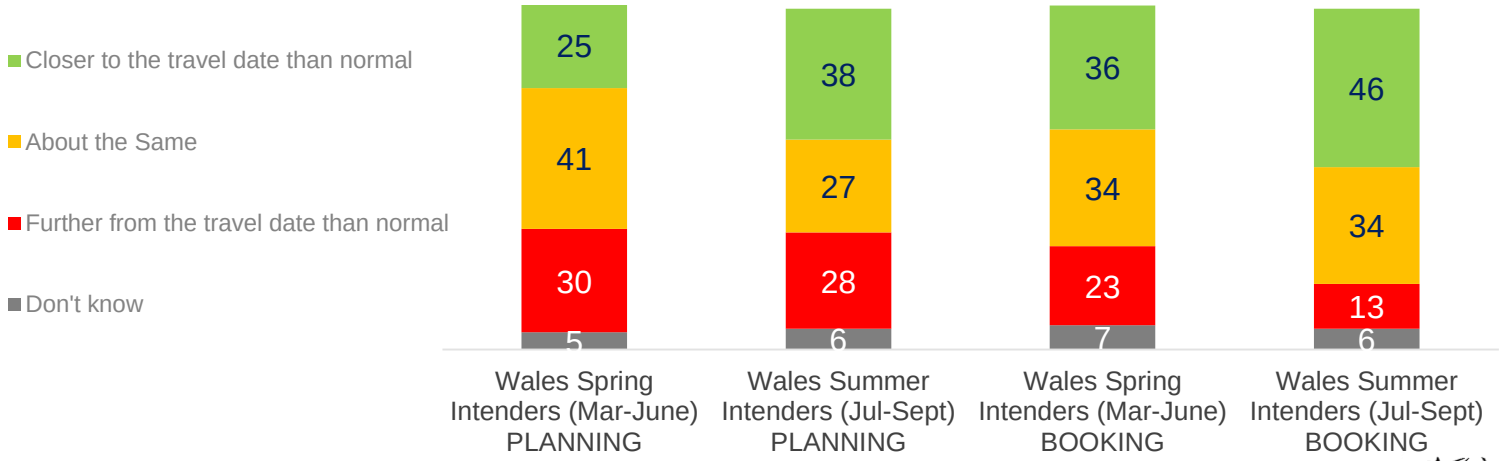


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Wales inclusive Spring Intenders n=20*; Wales inclusive Summer Intenders n=41* *Low base sizes but consistent with wider UK intenders data

Anticipated planning and bookings lead times

- As implied by low booking incidences, Wales spring and summer intenders anticipate booking their trips closer to the travel date than normal – 'normal' being before the pandemic. This suggests that, in the event of restrictions being lifted, tourism organisations should anticipate later bookings than a normal year. There are no differences in tendencies across life stages, although anticipated booking versus normal is relative to standard behavior.

Figure 31b. Planning and booking lead times for Spring and Summer trips compared to normal, Percentage Waves 17-20, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip in Scotland?

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Profiling spring and summer overnight trips to Wales

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Intention to visit Wales by region of residence

- Nearly half (45%) of Wales resident Spring Intenders plan on taking their next overnight spring trip in Wales, 2 in 5 (40%) of Wales resident Summer Intenders. Outside of Wales, intenders that live in the West Midlands and North West of England are the most likely to take a trip to Wales, although there is also interest from South East and South West, particularly in the spring.
- The vast majority of those planning on a trip to Wales across both seasons live outside Wales.

Figure 32. Intention to take a trip to Wales by region of residence, Percentage, Waves 22-25, U.K.

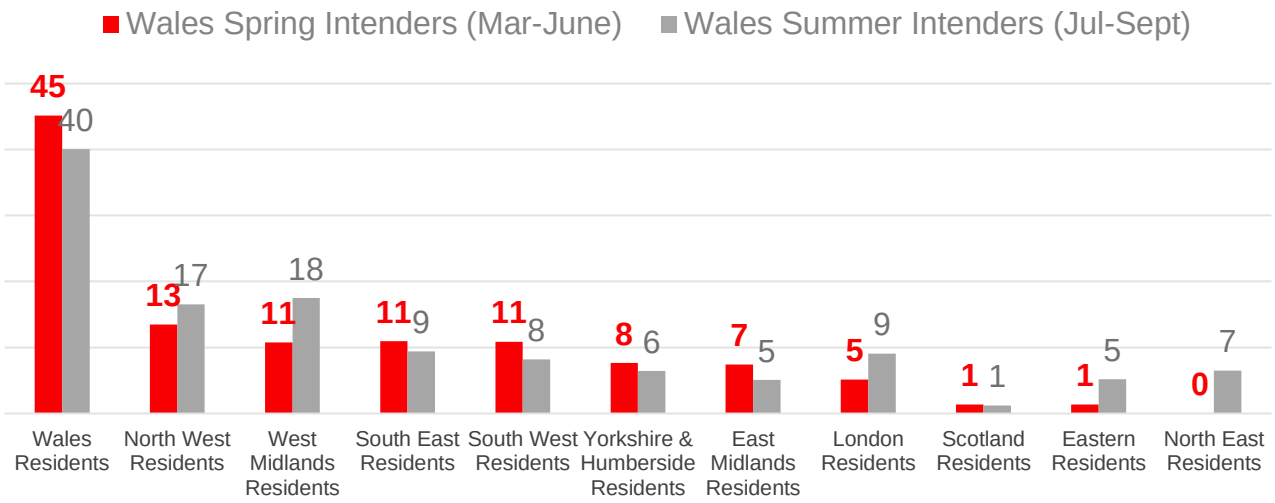
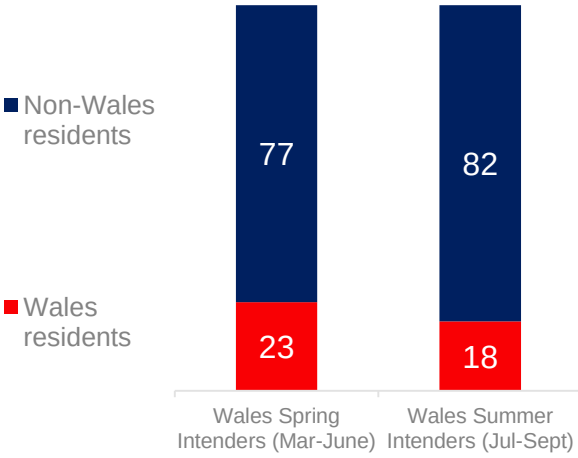


Figure 33. Breakdown of Wales intenders by region of residence, Percentage, Waves 22-25, U.K.



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 Spring/July-Sept. Residents in each region Wales n=124/139, East of England n=53/82; East Mids n=65/77; North East n=33/44; North West n=107/114; South East n=127/153; South West n=80/81; West Mids n=98/118; Yorkshire and The Humber n=95/84;London n=160/153; Scotland n=178/145

Demographics of Wales intenders compared to general population

- Families have the highest representation amongst Wales Spring and Summer Intenders (in particular in the summer), indexing significantly higher than within the U.K. population. Pre-nesters also index higher than the population, again particularly in the summer months. Conversely, retirees and older independents have lower representation than amongst the population – continuing the trend witnessed within the last year. It's worth noting that Wales is set to generate a higher proportion of family visitors in spring and summer than the U.K. on the whole.
- Social grades AB and C1C2 have higher representation amongst intenders than amongst the broader population, with DEs (who tend to be older) having lower intentions to visit Wales across both Spring and Summer.

Figure 34. Breakdown of populations and intenders by life stage, Percentage Waves 22-25, U.K.

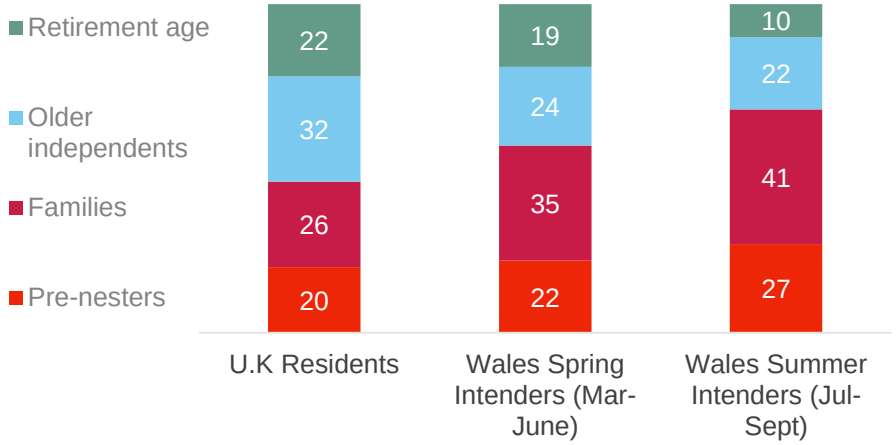
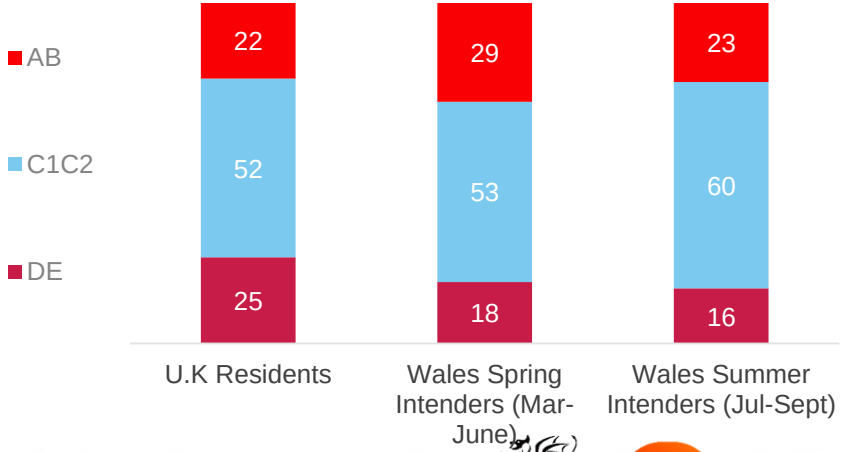


Figure 35. Breakdown of populations and intenders by social grade, Percentage Waves 22-25, U.K.



Source: Demographics. Base: All respondents. U.K. population n=3,174; Wales inclusive Spring Intenders n=128; Wales inclusive Summer Intenders n=158

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Whether planned or booked holiday or short break yet

- Although less likely than pre-nesters and families to plan on *going* on an overnight short break or holiday in the U.K., older independents and retirees that *do* intend to take a trip are more likely to have actually booked it than other life stages. In the U.K. context (base sizes are not large enough to look at Wales intenders), the profile of bookers is therefore different to the profile of intenders – families remain the largest group, but retirees and older independents make up a similar proportion. However, younger audiences tend to book closer to the travel date so the final breakdown is likely to be more balanced.

Figure 34b. Proportion of Spring and Summer U.K. Intenders that have already *planned* their trip , Percentage Wave 25, U.K.

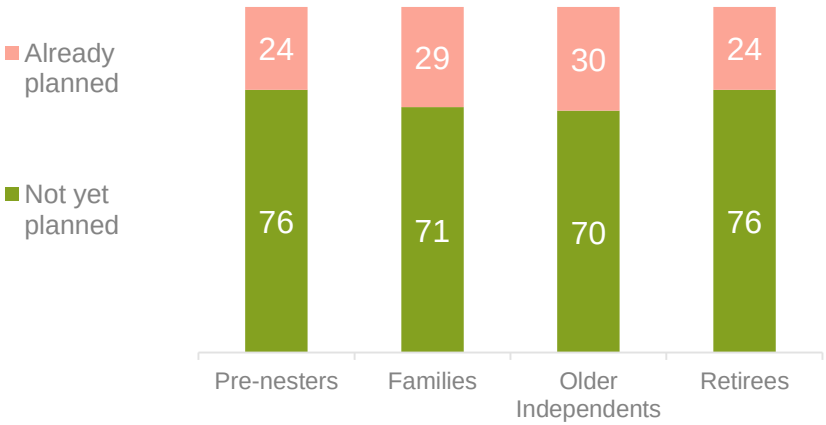
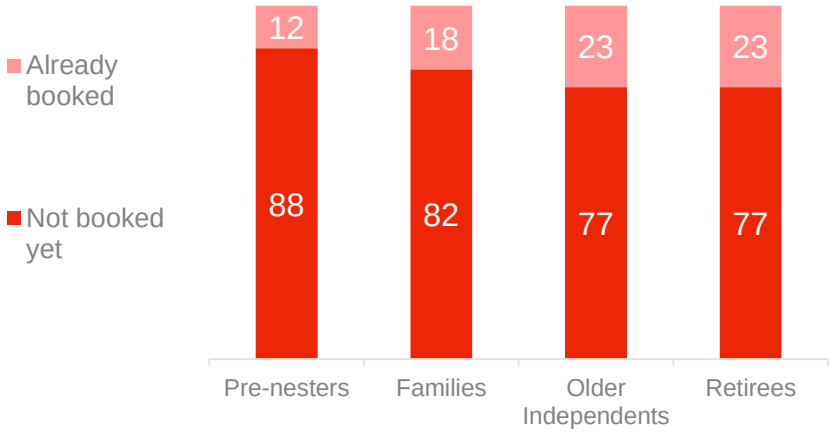


Figure 35b. Proportion of Spring and Summer U.K. Intenders that have already *booked* their trip, Percentage Wave 25, U.K.



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? Spring and Summer U.K. intenders: Pre-nesters n=167; Families n=186; Older Independents n=135; Retirees n=95;

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Financial segments and financial impact of COVID-19 on intenders

- Wales intenders are broadly aligned with the U.K. population in describing how their finances have been hit by COVID-19 - nearly half are either better off than before or have not been impacted financially, with over half 'hit hard' or having to be careful.
- Wales summer trip intenders are more likely to describe themselves as better off or not affected financially.

Figure 36. Breakdown of intenders by financial segments, Percentage, Waves 22-25, U.K.

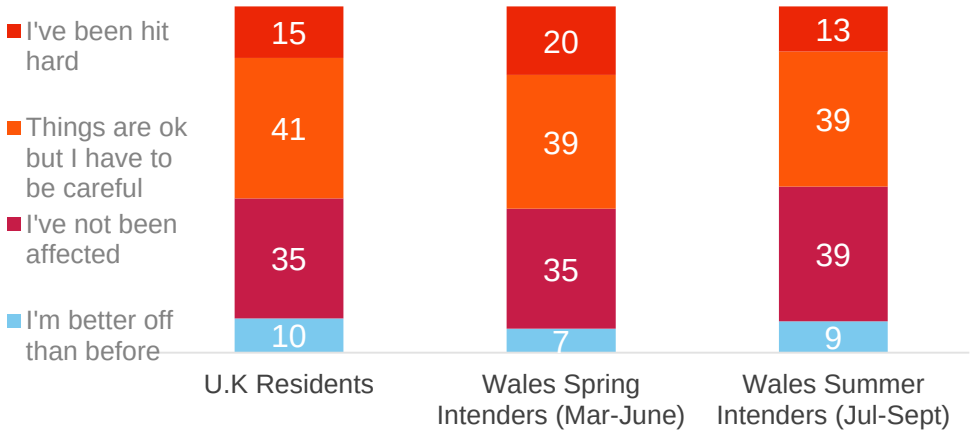
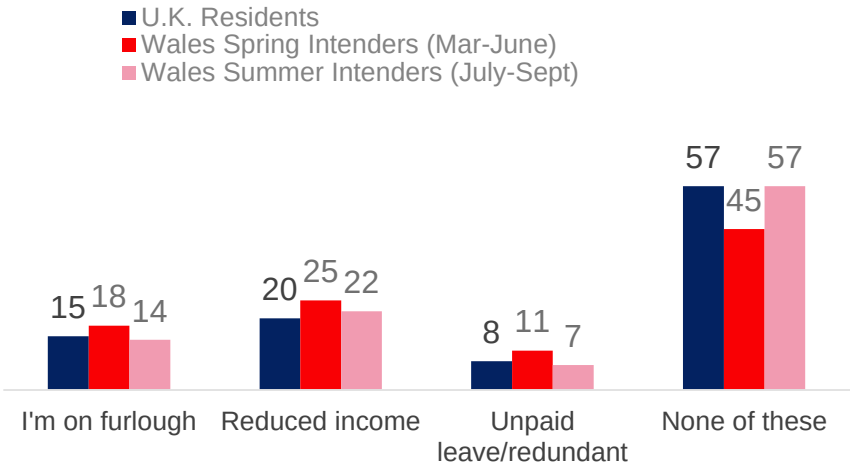


Figure 37. Employment impact on intenders, Percentage, Waves 22-25, U.K.



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=3,174; Wales inclusive Spring Intenders n=124; Wales inclusive Summer Intenders n=151. Please not UK residents do not perfectly match earlier charts showing this information due to the additional fieldwork period being used for the charts on this page.

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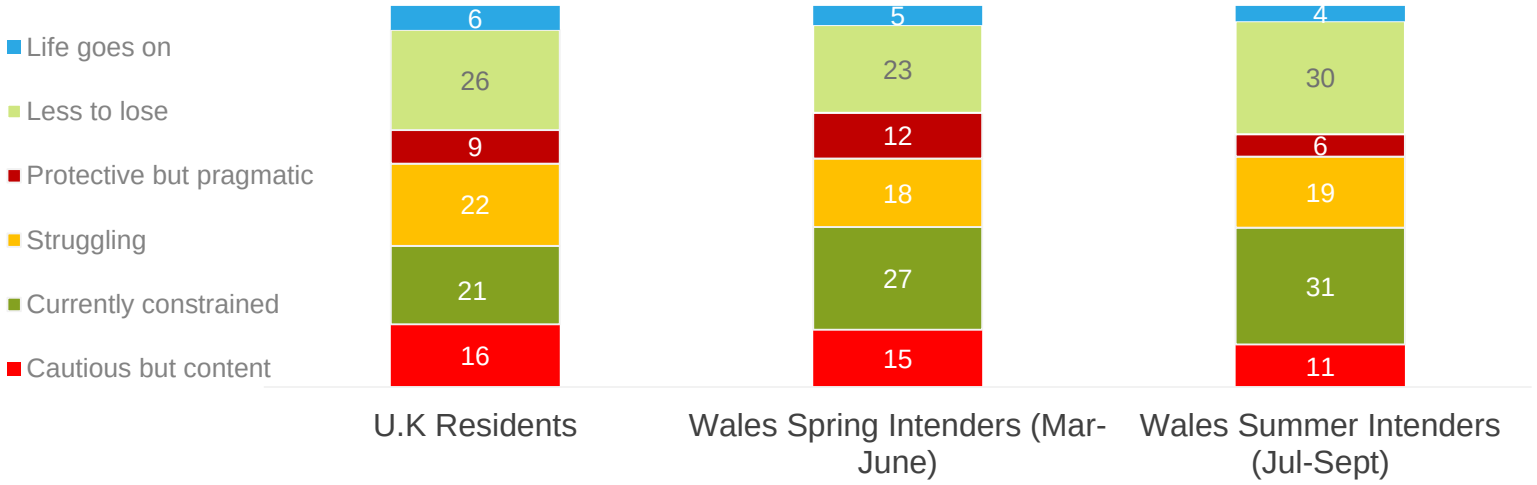
Attitudinal segments of intenders (see definitions page for more information)

- Wales intenders broadly replicate the U.K. population in terms of COVID segments. Wales intenders have a different segment profile to U.K. intenders across both spring and summer. U.K. intenders are more likely to fall into the 'less to lose' and 'life goes on' segments (39% compared to 28% in the spring; 34% compared to 31% in the summer).

Figure 38. Breakdown of population and intenders by COVID segments, Percentage, Waves 22-25, U.K.



Base: All respondents. U.K. population n=7.037; Wales inclusive Spring Intenders n=128; Wales inclusive Summer Intenders n=158

Spring and summer intenders overnight trip behaviour

Trip purpose and trip length of Spring and Summer trips

- Consistent with previous reporting, the vast majority of overnight trips to Wales in spring and summer are likely to be for a 'holiday' purpose, higher than amongst all U.K. trips where 'visits to friends or relatives' are more prevalent.
- Spring trips are relatively evenly split between short breaks and holidays of 4+ nights. In the summer, holidays of 4+ nights make up the majority, although 1 in 10 are unsure. The trip length of Wales trips are relatively consistent with U.K. trips.

Figure 39. Purpose of next Wales trip, Percentage, Waves 22-25, U.K.

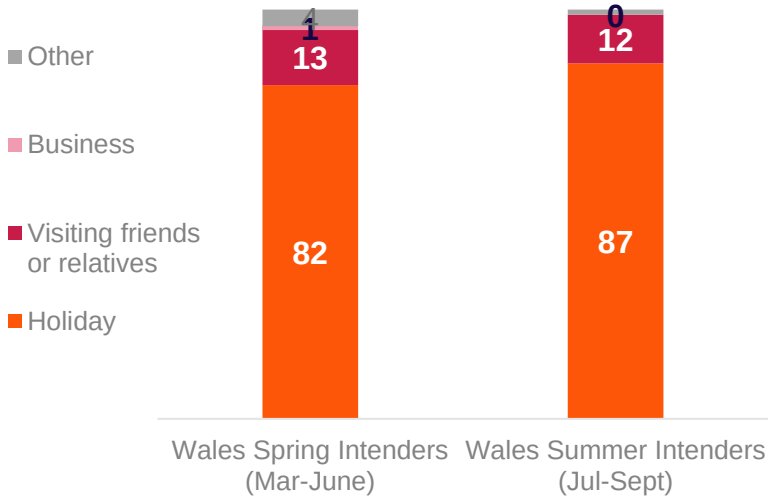
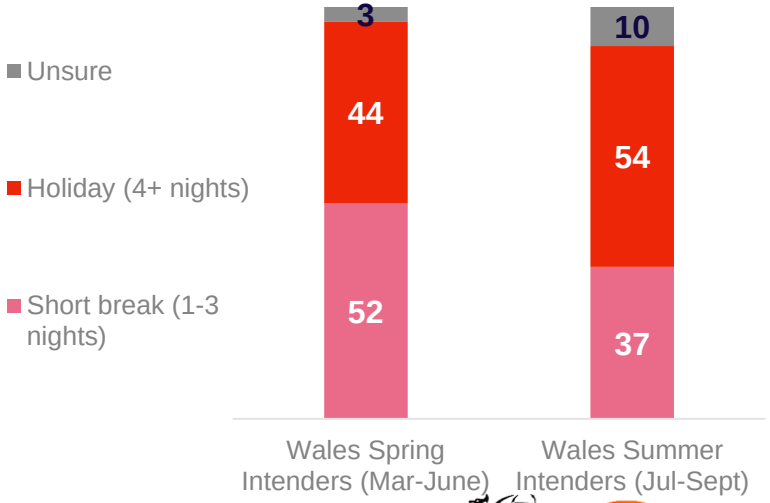


Figure 40. Length of next Wales trip, Percentage, Waves 22-25, U.K.

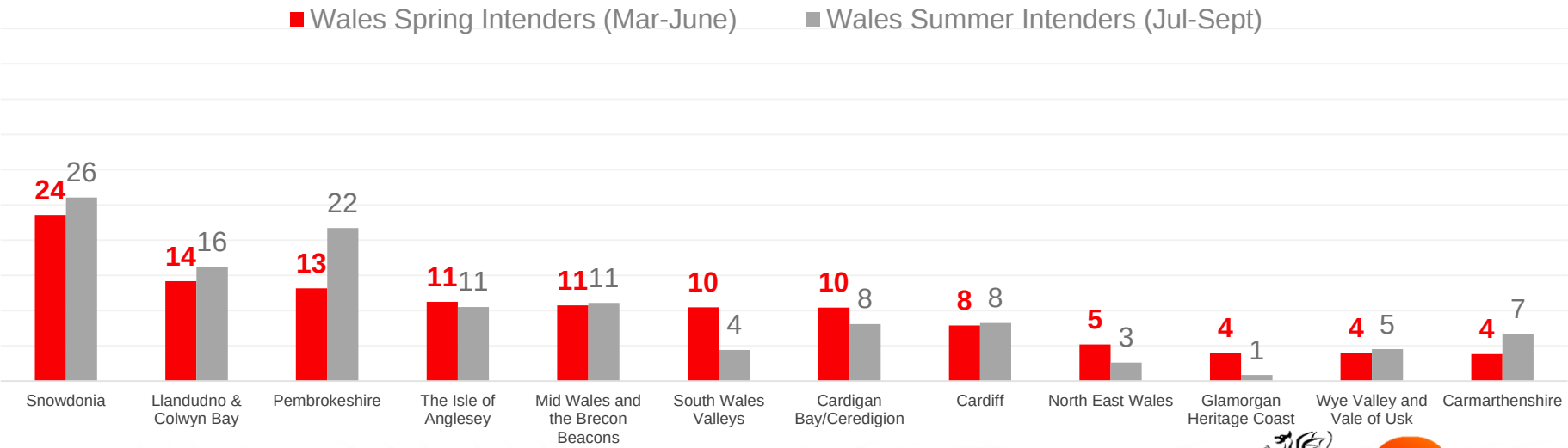


VB6f. And which of the following best describes the purpose of this trip? Base: All respondents planning on taking a holiday or short break in Wales. Wales Exclusive Spring Intenders n=82; Wales exclusive Summer Intenders n=92

Where planning on staying on Wales trip in spring and Summer

- Consistent with previous reporting periods, Snowdonia is the number one destination for a Spring trip amongst Wales trip intenders. Snowdonia is followed by Llandudno & Colwyn bay and Pembrokeshire, with a range of other destinations making up the remainder.
- Snowdonia is also the preferred destination in the summer, followed closely by Pembrokeshire with planned trips in the summer being more concentrated in these popular areas.

Figure 41. Planned destination for next Wales trip, Percentage Waves 22-25, 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. Wales inclusive Spring Intenders n=124; Wales inclusive Summer Intenders n=151

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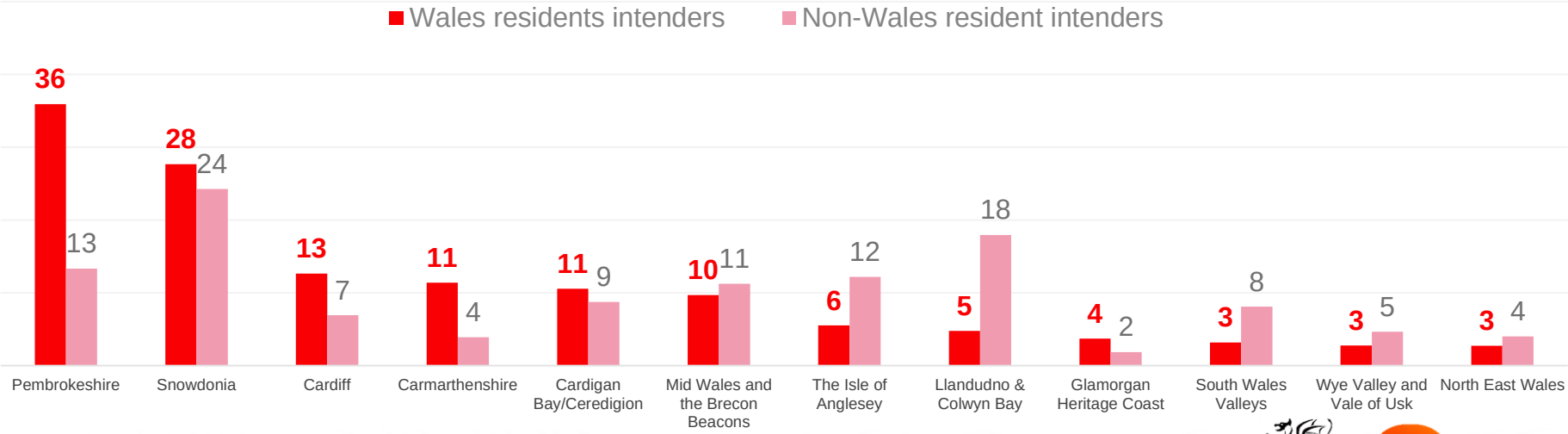
Where planning on staying on Wales trip in spring and Summer

- Consistent with previous reporting periods, Snowdonia is popular amongst both Wales and non Wales residents planning a trip in Wales this Spring and Summer. Despite Snowdonia's popularity across both audiences, nearby Llandudno and Colwyn Bay and The Isle of Anglesey are significantly more popular amongst non-Wales residents.
- However, Pembrokeshire is the preferred destination for Wales residents, 36% planning an overnight trip there, compared to just 13% of non-Wales residents.

Figure 42. Planned destination for next Wales trip for Spring and Summer Intenders by residence, Percentage Waves 22-25, 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 March to September. All Wales resident intenders n=110; Non-Wales resident intenders n=165

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Main mode of transport for next Wales short break or holiday

- Across both spring and summer, ‘own car’ is by far the leading mode of transport intended to be used on trips to Wales, followed by train.
- In comparison, U.K. trip intenders are significantly more likely to use train, driven in part by the higher incidence of city/large town trips.

Figure 43. Top 5 main modes of travel of destination for trip for Wales Spring Intenders Percentage Waves 22-25, U.K.

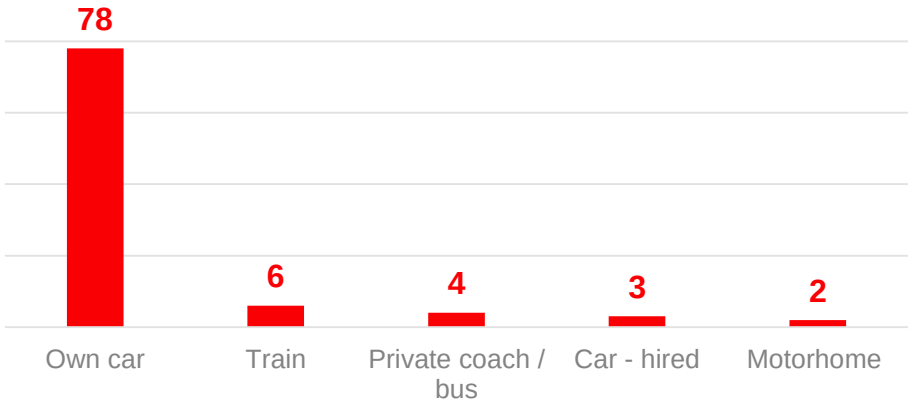
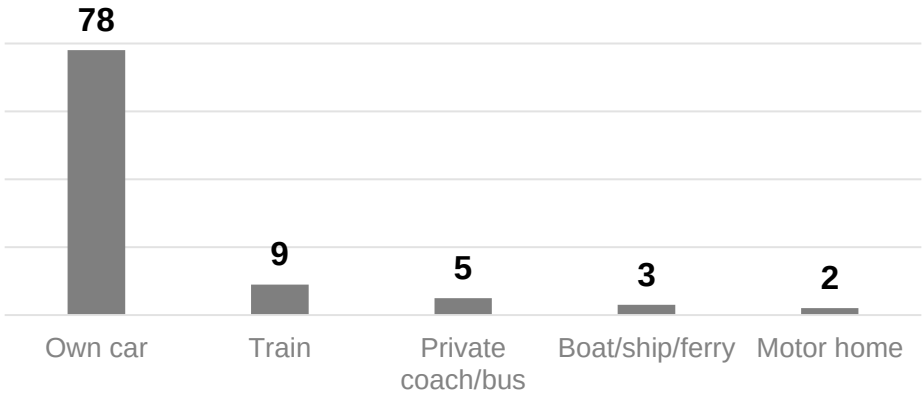


Figure 44. Top 5 main modes of travel of destination for Wales Summer Intenders Percentage Waves 22-25, U.K.



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 Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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

- Wales intenders in both the spring and summer are most likely to anticipate their trip being in a 'traditional coastal/seaside town', followed by 'countryside or village' and 'rural coastline'. The preference for these destination types is also evident for wider trips to the U.K. However, U.K. trips intenders are significantly more likely to intend to visit a 'city or large town' than Wales trip intenders.

Figure 44. Main type of destination for Wales Spring Intenders, Percentage Waves 22-25, U.K.

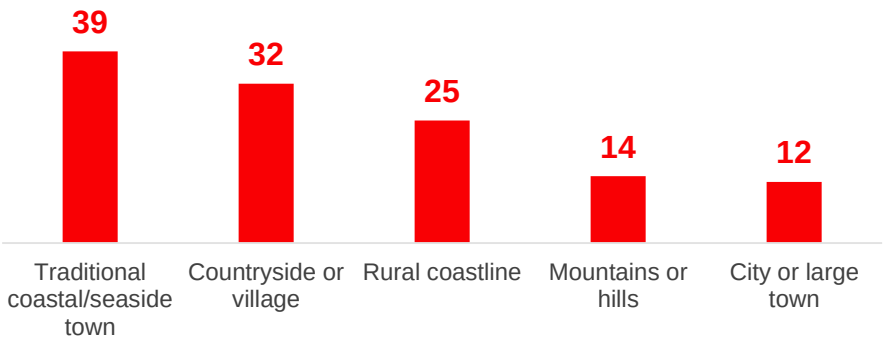
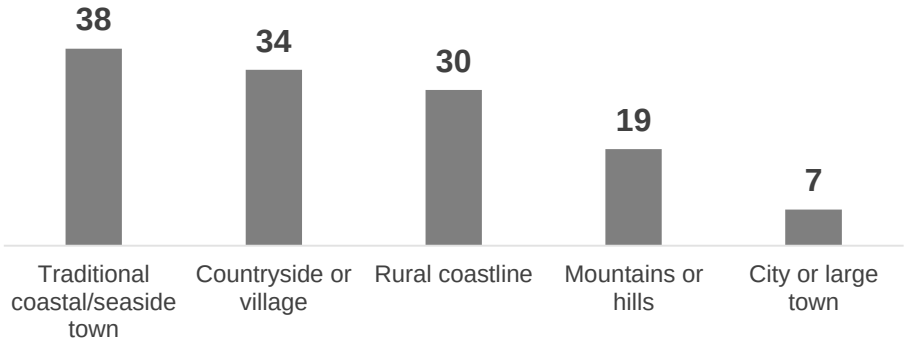


Figure 45. Main type of destination for Wales Summer Intenders, Percentage Waves 22-25, U.K.



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 Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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

- Across both the spring and summer periods, visitor parties are most likely to spend an overnight short break or holiday in Wales with their partner, followed by child/grandchildren/young adults and 'other members of family'. Pets are also well-represented, making up nearly 2 in 5 visitor parties in spring and 1 in 10 in the summer.
- Wales is significantly more likely to attract parties with children than the wider U.K., particularly within the summer period (58% of Wales intenders anticipating children in their party compared to 42% of U.K. intenders).

Figure 46. Visitor party make-up for Wales Spring Intenders, Percentage Waves 22-25, U.K.

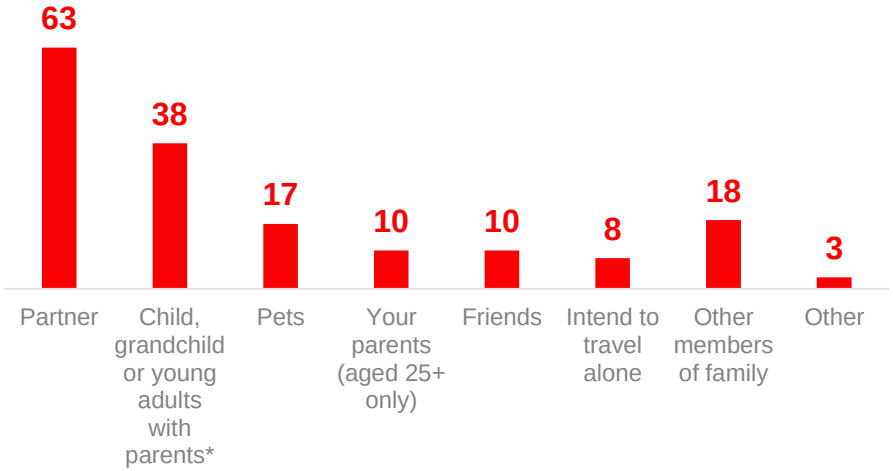
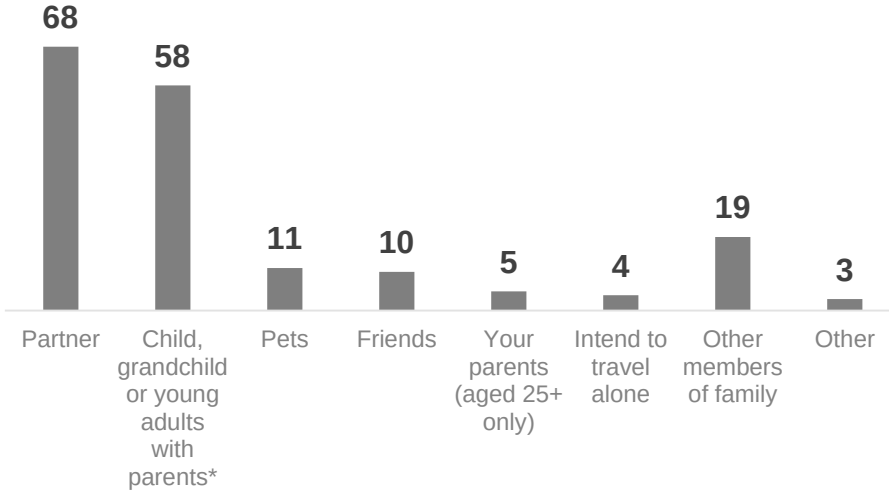


Figure 47. Visitor party make-up for Wales Summer Intenders, Percentage Waves 22-25, U.K.



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 Spring Intenders n=82; Wales exclusive Summer Intenders n=92 *Child or young adults includes respondents that states 'children', 'grandchildren' and 16-24 year olds stating they will travel with their parents

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Type of accommodation for next Wales short break or holiday

- A range of accommodation types are being considered by Wales Spring Intenders - ‘hotel/motel/inn’ marginally ahead of ‘caravan/camping’, ‘commercial self-catering’, ‘a private home’ and ‘guesthouse/B&B/farmhouse’.
- In summer, the choice is more clear-cut – over half planning on camping or staying in a caravan – significantly higher than ‘commercial self catering’ and other accommodation types that follow closely behind.
- The dominance of ‘camping/caravan’ accommodation amongst Summer Intenders marks a difference to the wider U.K. intenders where this accommodation type is third behind ‘hotel/motel/inn’ and ‘commercial self-catering’.

Figure 48. Accommodation planning on staying in on next U.K. overnight trip for Wales Spring Intenders, Net percentage Waves 22-25, U.K.

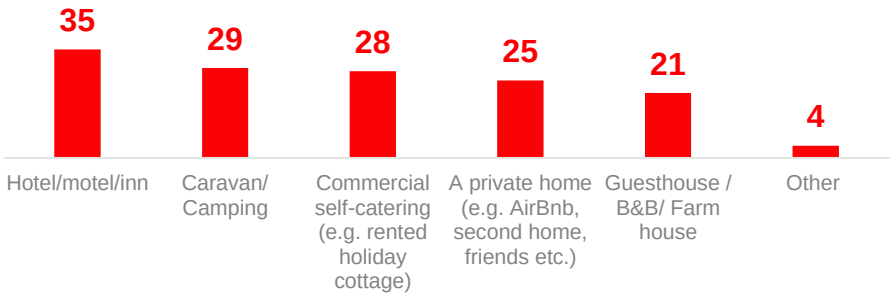
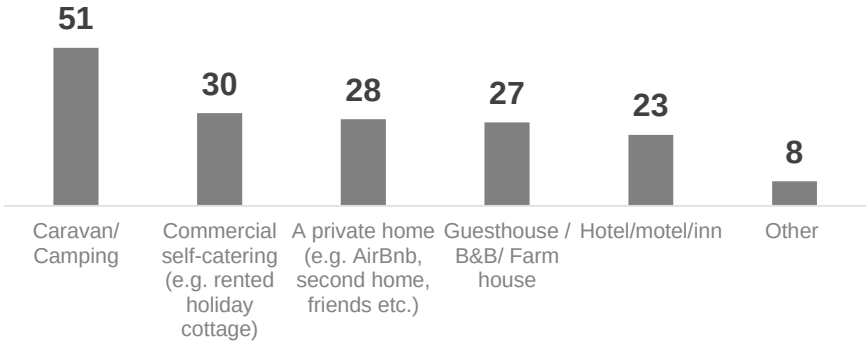


Figure 49. Accommodation planning on staying in on next U.K. overnight trip for Wales Summer Intenders, Net percentage Waves 22-25, U.K.



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 Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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Type of accommodation for next Wales short break or holiday

- ‘Static caravan’ is the leading choice amongst Wales intenders planning a stay in ‘camping/caravan’ accommodation across both time periods. In addition to static caravan, the spike in this accommodation choice in the summer is driven by ‘glamping/alternative accommodation’ and ‘tent’ stays.
- ‘Someone else’s private home on a commercial basis’ is the most popular private accommodation in the spring; friends or relatives in the summer, although the differences are not significant.

Figure 50. Type of camping/caravanning accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Waves 22-25, U.K.

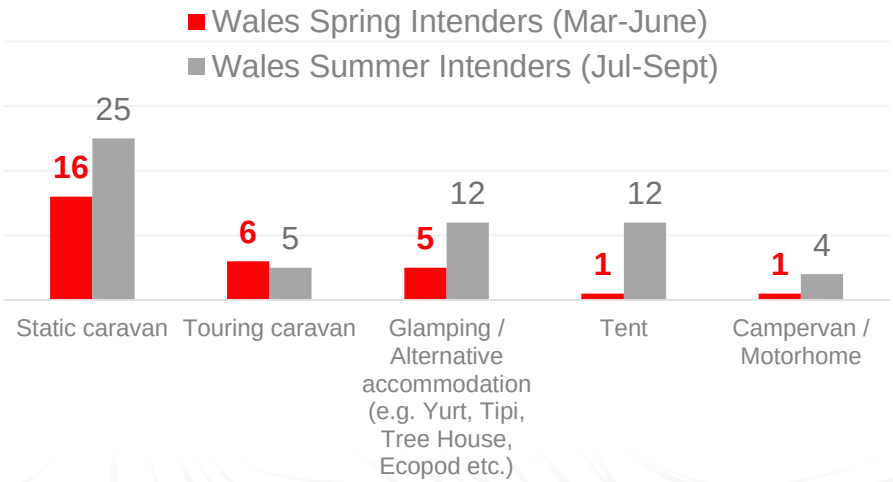
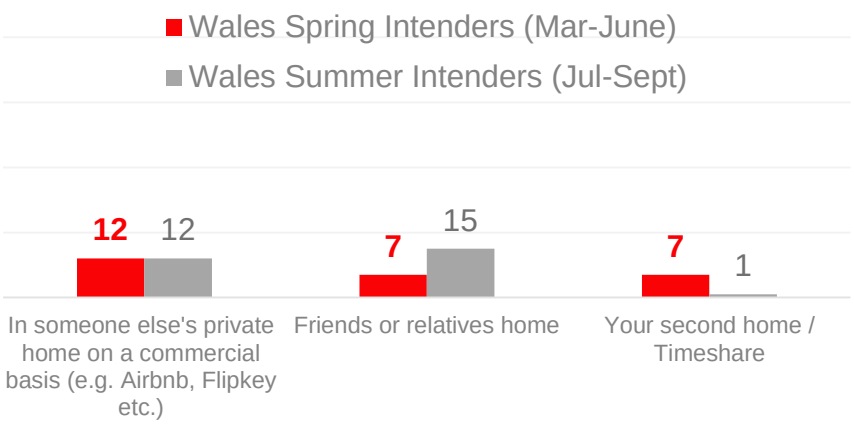


Figure 51. Type of private home accommodation planning on staying in on next overnight trip for Wales intenders, Net percentage Waves 22-25, U.K.



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 Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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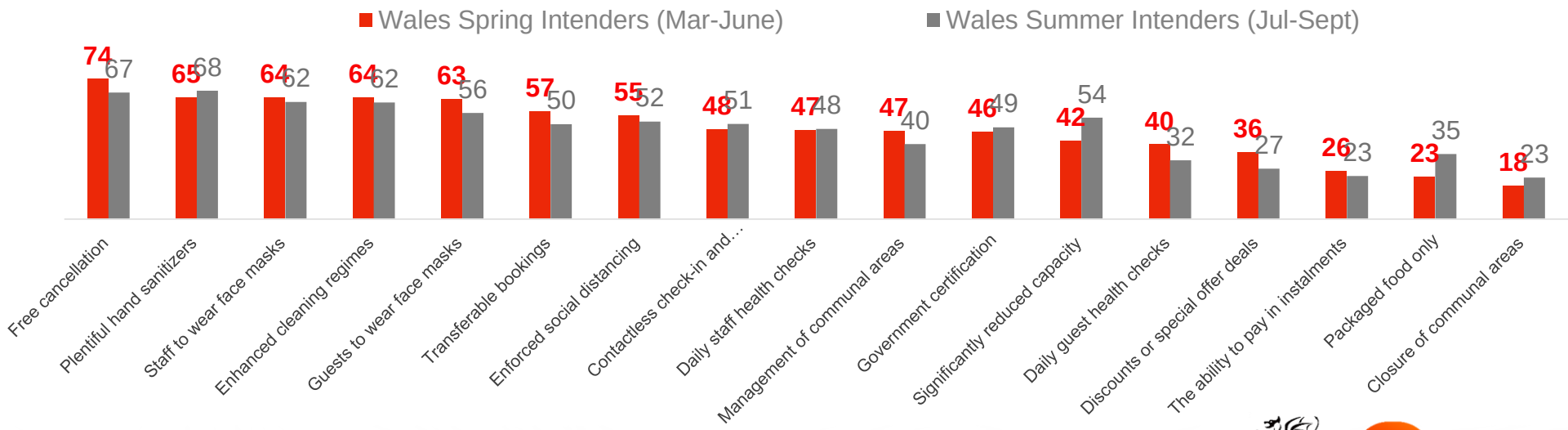
Conditions that are essential for a stay in accommodation

- Wales intenders have a number of requirements for accommodation to put in place for them to feel confident about staying. Free cancellation is the number one requirement, followed closely by plentiful hand sanitisers and staff to wear face masks.
- Free cancellation is more of a requirement for Wales intenders than U.K. intenders on the whole.

Figure 52. Top 10 conditions that are essential for a stay in accommodation for Wales intenders, Percentage and Net Percentages Waves 22-25, 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 in Wales. Wales Exclusive Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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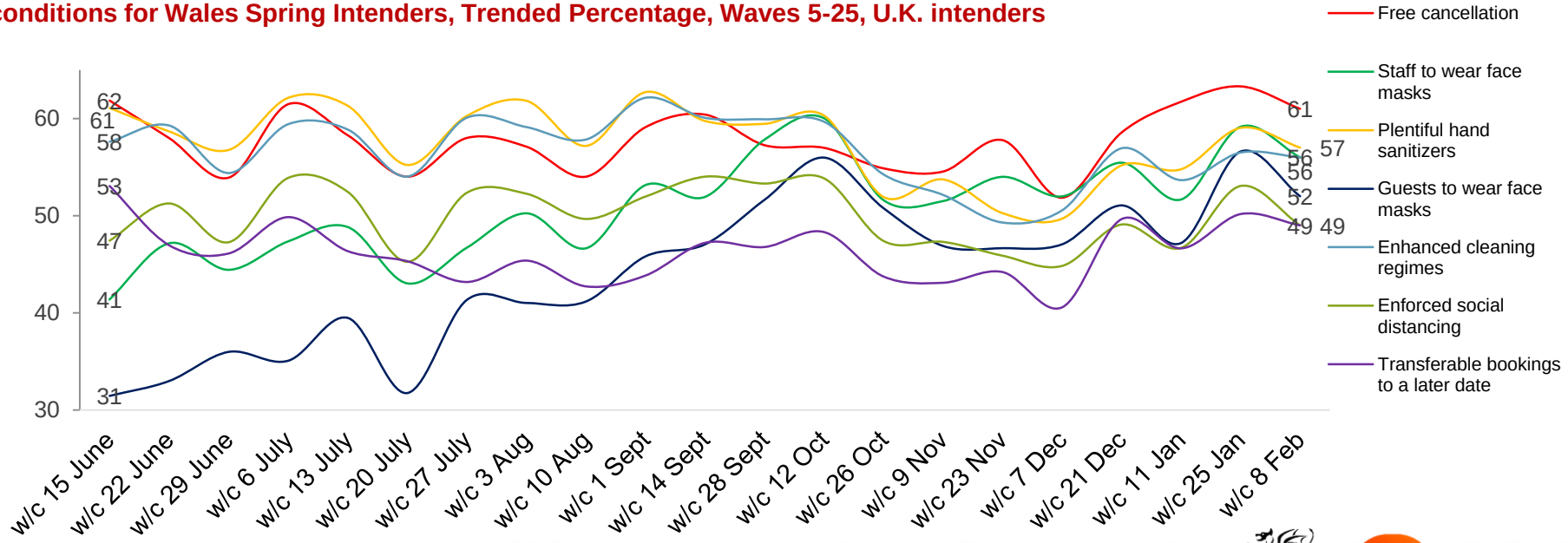
How required conditions have changed over time

- The conditions U.K. intenders require accommodation providers to have in place fluctuate in line with changing circumstances. However, it's notable that 'free cancellation' has remained of leading importance since June 2020, emerging as the most important from early December. Conversely, 'guests to wear face masks' has increased in importance as social acceptance of the practice has risen.

Figure 52b. Conditions that are essential for a stay in accommodation for U.K. intenders based on top 7 conditions for Wales Spring Intenders, Trended Percentage, Waves 5-25, U.K. intenders



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? All UK intenders n=c.800

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Anticipated spend on next Wales holiday or short break

- On average, Wales intenders plan on spending a similar amount on their Spring and Summer trips - £739 in spring and £748 in the summer. Around 2 in 5 anticipate spending under £500 across both periods. Around 1 in 4 plan on spending over £1,000 across both time periods.
- Spending amongst Wales intenders and U.K. intenders is similar in the spring, but U.K. intenders expect to spend significantly more in the summer. This is likely driven by accommodation choice – U.K. intenders less likely to opt for lower cost accommodation types such as camping.

Figure 53. Anticipated spend for Wales intenders , Percentage Waves 22-25, U.K.

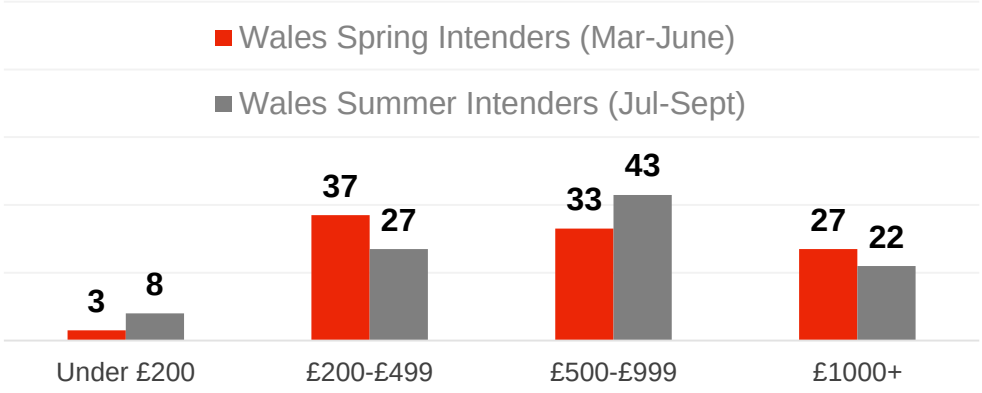
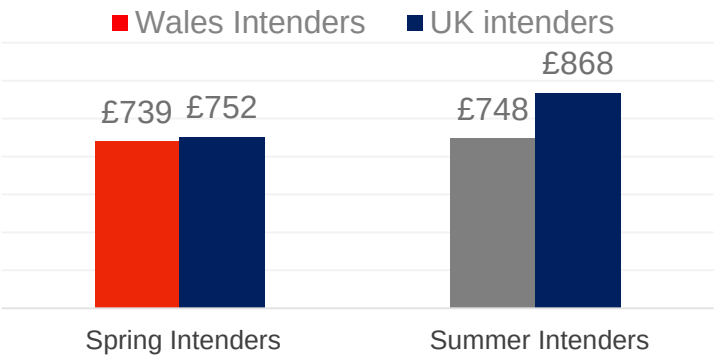


Figure 54. Anticipated average spend for Wales intenders, Average, Waves 22-25, U.K.



QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break in Wales. Wales Spring Intenders n=120; Wales Summer Intenders n=146

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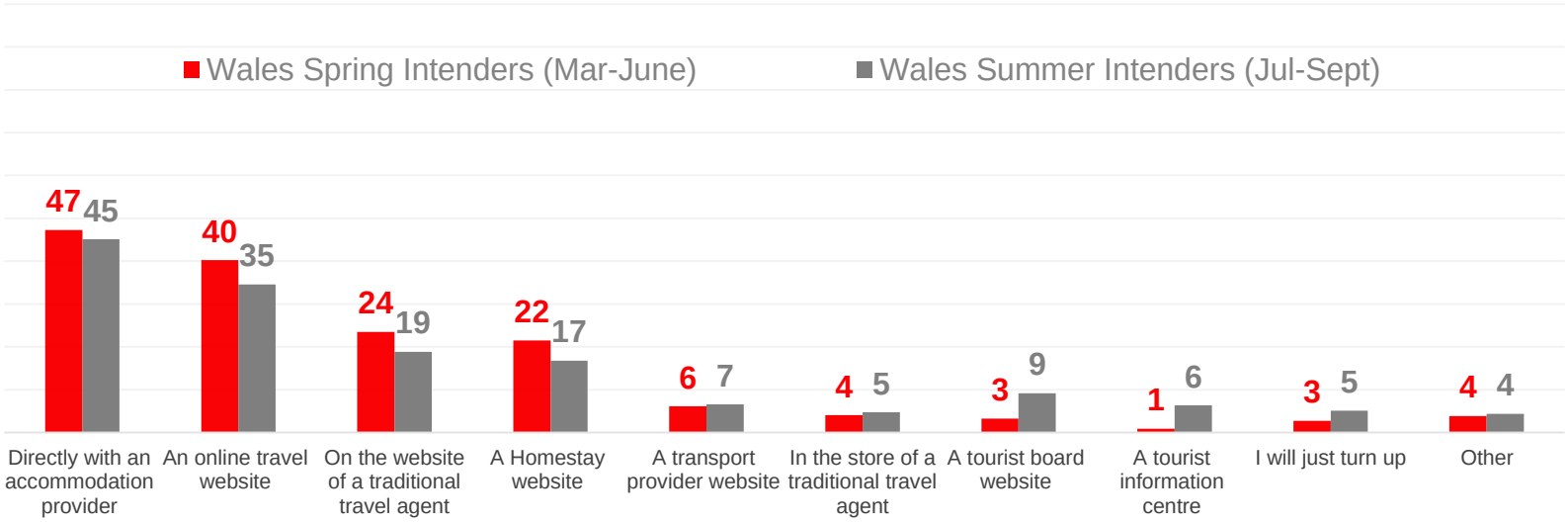
Preferred booking channel for next Wales short break or holiday

- Spring and Summer Wales Intenders are most likely to book directly with the accommodation provider, followed by an online travel agent (OTA) and the website of a traditional travel agent.

Figure 55. Accommodation booking channel for Wales intenders, Net percentage Waves 22-25, 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 Exclusive Spring Intenders n=82; Wales exclusive Summer Intenders n=92

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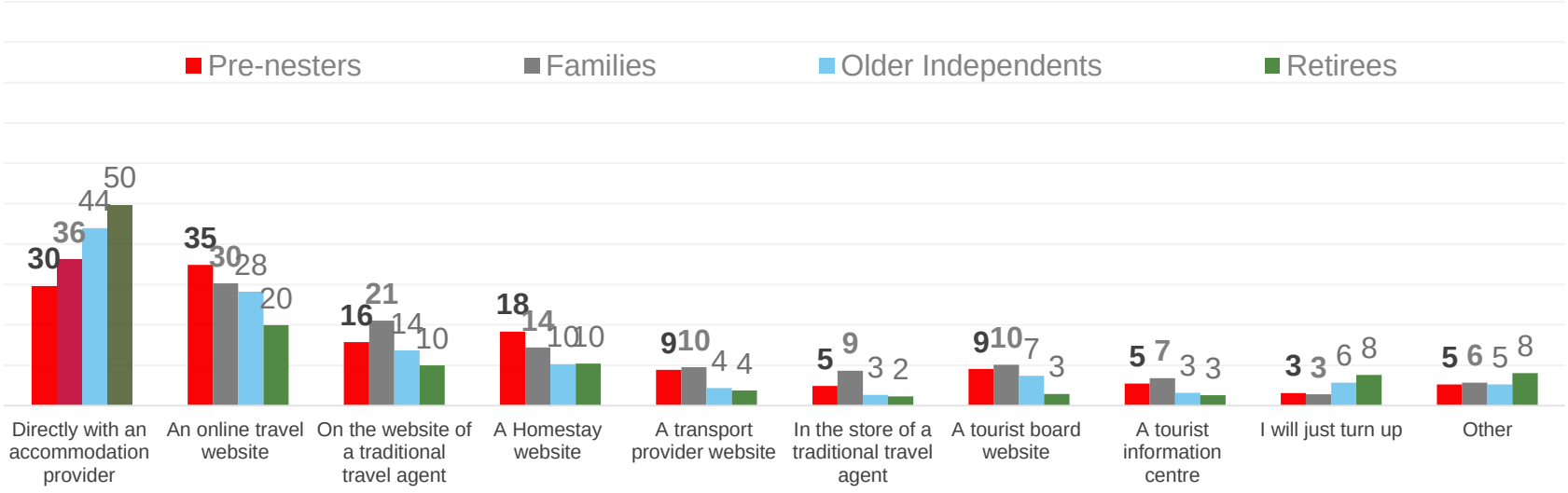
Preferred booking channel for all UK intenders by life stage

- Booking preference varies considerably by life stage – retirees are the most likely to prefer direct bookings, and the least likely to choose an online travel agent. Pre-nesters, in contrast, index highest for online travel agents and homestay websites.

Figure 55b. Accommodation booking channel for all UK Spring or Summer intenders by life stage, Net percentage Waves 22-25, U.K.



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: UK Spring and Summer intenders: Pre-nesters n=579; Families n=811; Older Independents n=572; Retirees n=376;

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Travelling for business

Intention to take an overnight business trip by June 2021

- Only 7% of U.K. adults in employment intend to take an overnight business trip by June 2021, 5% of Wales residents in employment. A meeting is the most prevalent reason for an overnight trip (meetings of fewer than 6 people indexing higher), followed by team building.

Figure 56. Proportion anticipating an overnight business trip by June 2021, Percentage, Waves 22 + 24, U.K.

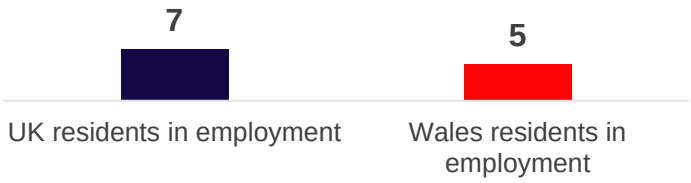
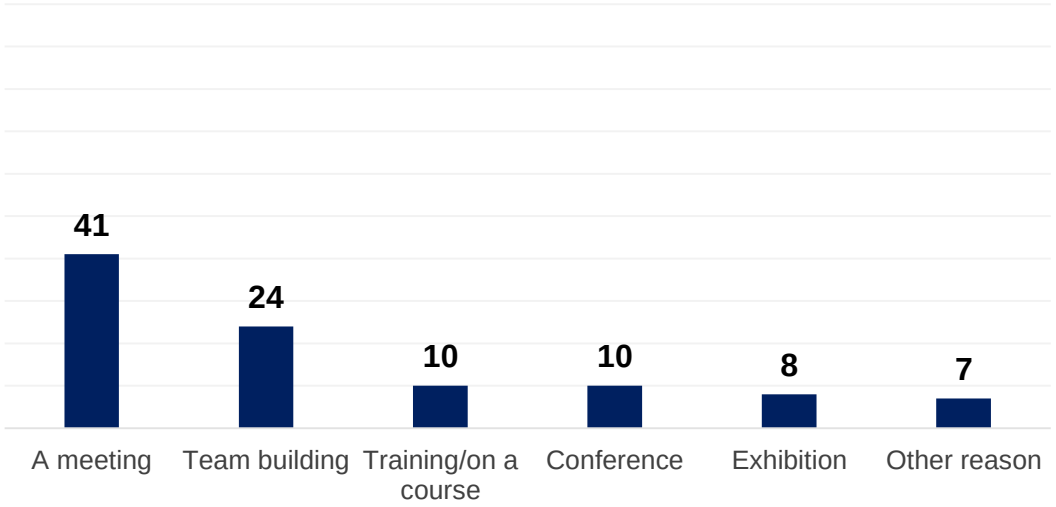


Figure 57. Reasons for taking an overnight business trip , Percentage Waves 22 + 24, U.K. residents in employment

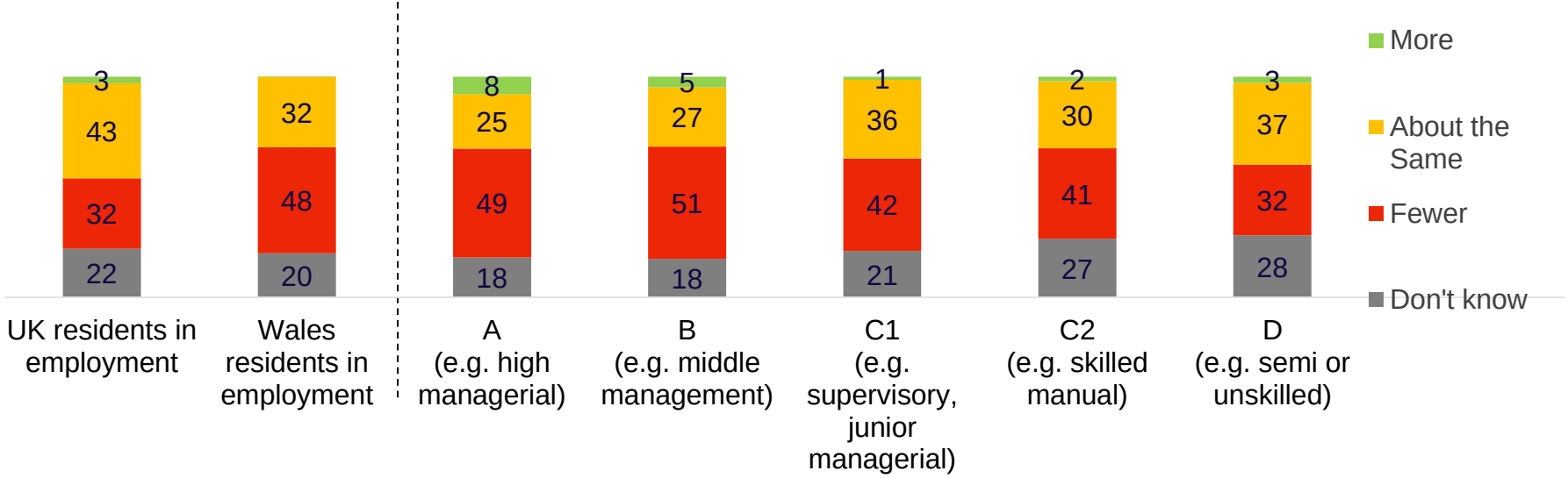


VB14a. Now looking ahead, are you intending to take any overnight business trips in the U.K. between now and June 2021? VB14b. What would be the main reason for this overnight business trip? Base: All in employment: U.K. residents in employment n=2629; Wales residents in employment n=297. U.K. residents taking a trip n=200

Anticipated number of overnight business trips compared to normal

- U.K. adults who are planning an overnight business trip anticipate significantly fewer trips compared to normal between now and June 2021. Those in higher managerial roles are most likely to anticipate more of these trips, although 'fewer' trips still dominate their responses. There remains a great deal of uncertainty around business travel trips with one in five of those in employment stating don't know how many trips they are likely to take.

Figure 58. Anticipated number of overnight business trips by June 2021 compared to normal, Percentage Waves 22 + 24, U.K. working residents



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? All in employment: U.K. residents in employment n=2629; Wales residents in employment; A n=272; B n=639; C1 n=739; C2 n=733; D n=246

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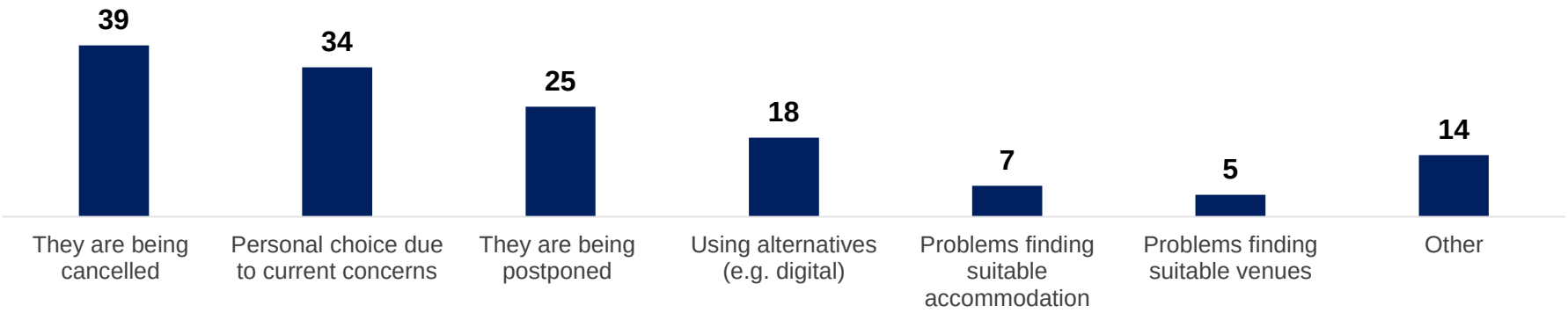
Reason for taking fewer overnight business trips

- Cancellation (39%) is the main reason for overnight business trips not going ahead, significantly higher than 'postponement' (25%) – although together this is a reason for 55%. 'Personal choice due to current concerns around COVID' is the second most stated reason for fewer trips, with around 1 in 5 citing digital alternatives. Only a small minority cited problems finding suitable accommodation or venues.

Figure 59. Reason for taking fewer overnight business trips, Percentage Waves 22 + 24, U.K.



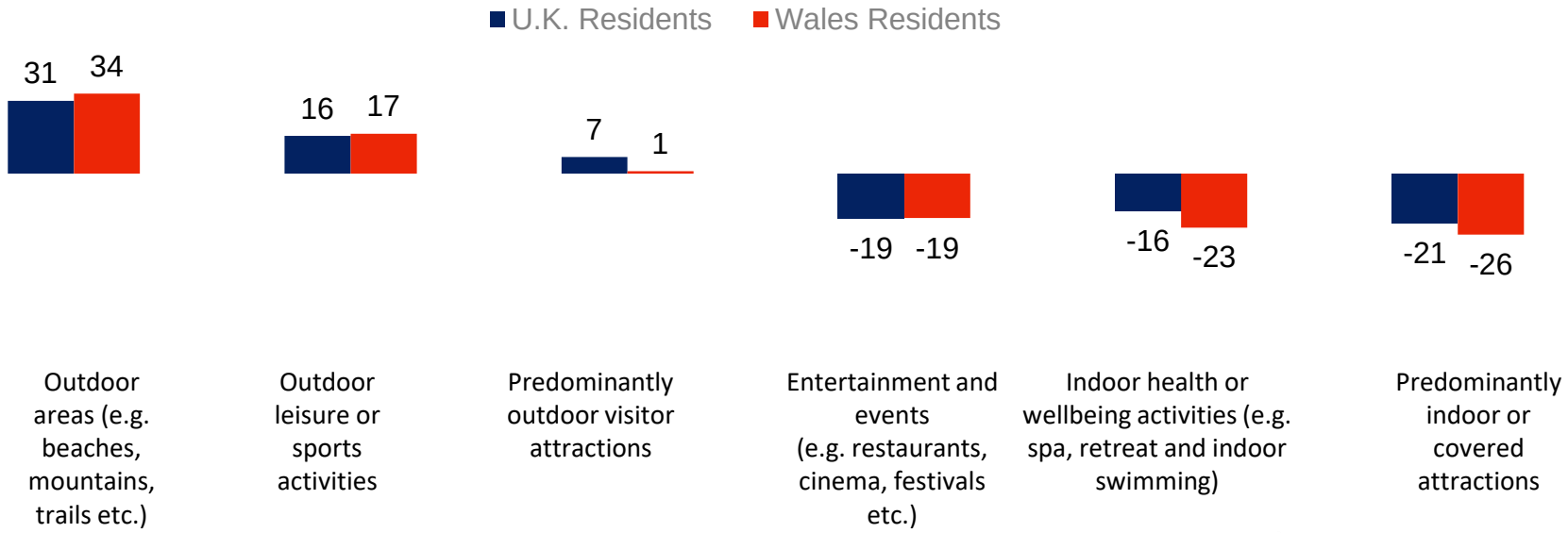
VB14d. Which, if any, of the following factors are contributing to you feeling that you'll be taking fewer overnight business trips? Base: All in employment taking fewer business trips: U.K. residents in employment taking fewer business trips n=1157

General leisure behaviour in the next month

Anticipated activity compared to 'normal' in the next few months

- As of early February 2020, U.K. and Wales adults anticipate conducting more visits to outdoor areas and engaging in more outdoor leisure or sport activities. They anticipate visiting marginally more outdoor visitor attractions. Engagement in entertainment and events, indoor health or wellbeing activities and visiting indoor attractions is set to be lower.

Figure 60. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Waves 24-25, UK



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=3515; Wales population n=409

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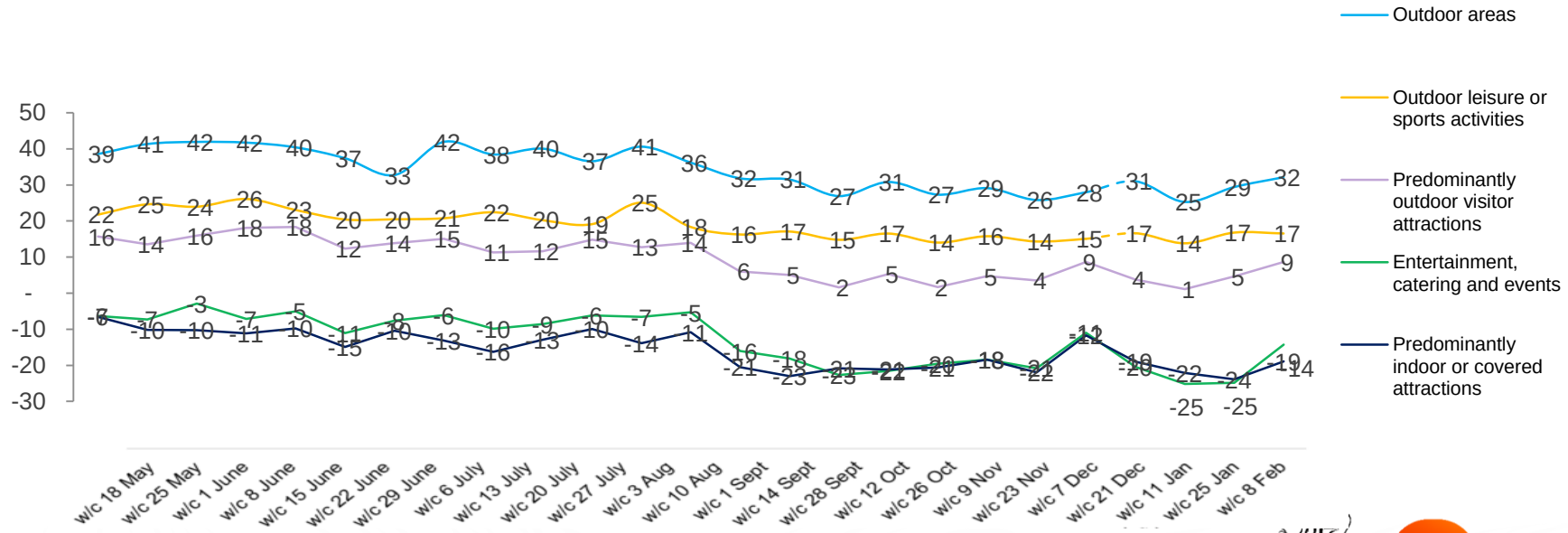
Trended anticipated activity compared to 'normal' in the next few months

- The order of anticipated activity has remained largely consistent since the start of the pandemic. However, there was a drop in all anticipated activity in early September as the 'R level' rose and the U.K. entered a period of tougher restrictions. In line with restrictions, there has been no full recovery to the activity anticipated in August, although this will in part be driven by seasonal weather patterns.

Figure 60b. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Waves 1-25, UK

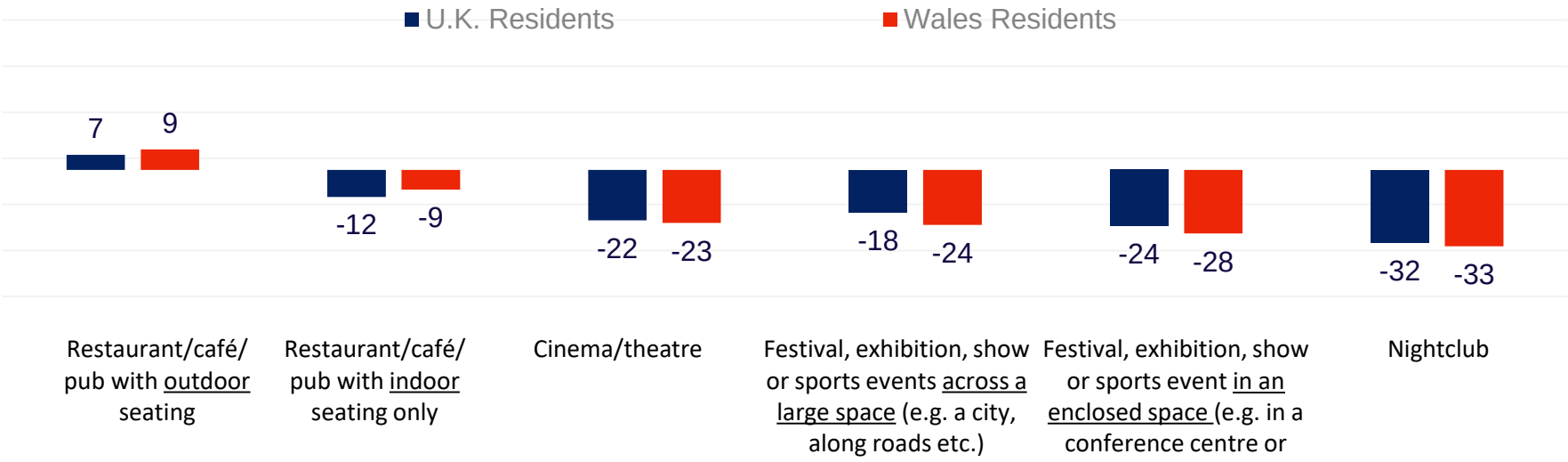


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=c.1,750.

Anticipated activity compared to 'normal' in the next few months

- Both U.K. and Wales adults anticipate visiting restaurants with outdoor seating more than normal in the next few months, although less so than in the autumn 2020. Unsurprisingly given continued restrictions, other entertainment and events activities – including visiting indoor restaurants, festivals, cinemas/theatres and nightclubs are likely to continue to generate fewer visits, especially by Welsh residents.

Figure 61. Entertainment and events venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Waves 24-25, 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=3515; Wales population n=409

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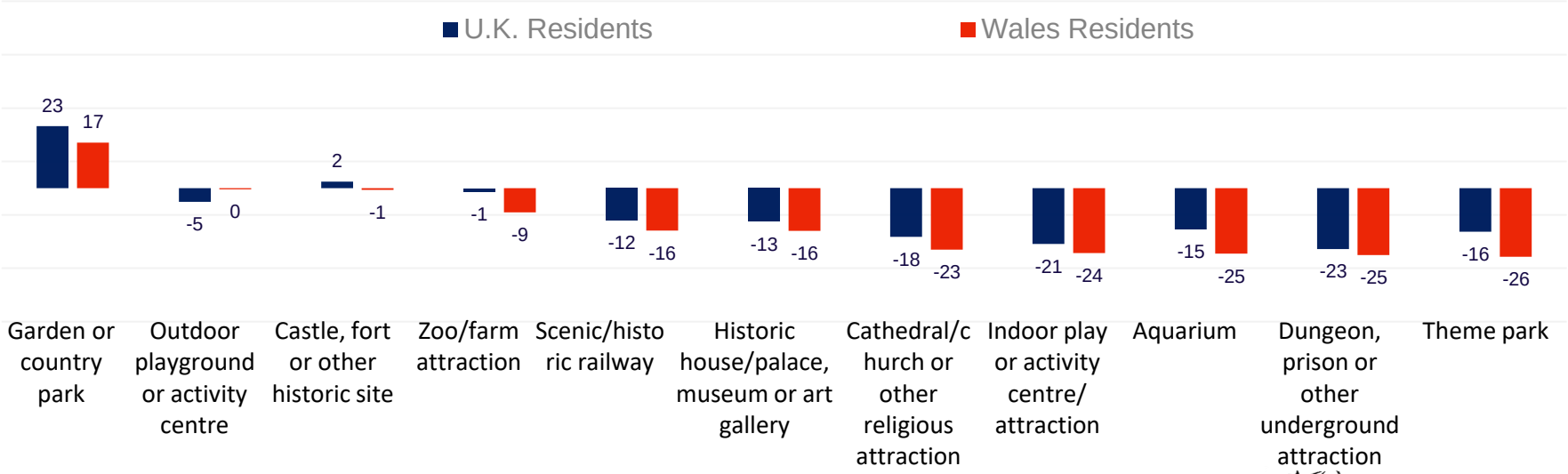
Anticipated activity compared to 'normal' in the next few months

- Consistent with previous reporting, Gardens and country parks 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'. Again, this is unsurprising given the extent of restrictions. Expectations to visit indoor attractions are lower amongst Welsh residents.

Figure 62. Visitor attractions more or less likely to visit compared to normal in the next few months, Net: 'more likely' minus 'less likely' Waves 24-25, 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=3515; Wales population n=409

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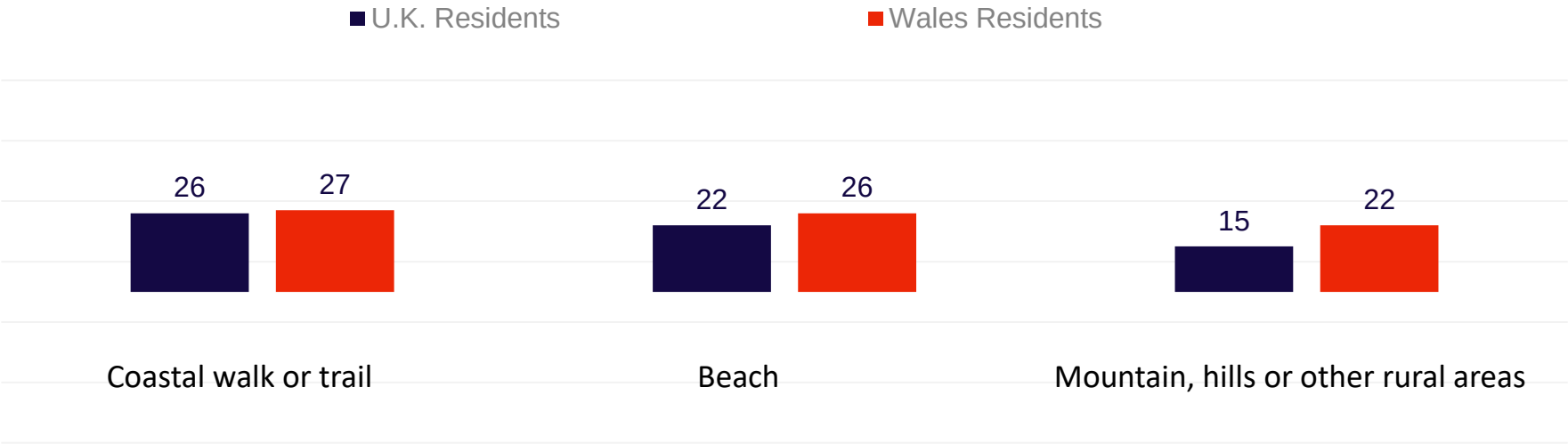
Anticipated activity compared to 'normal' in the next few months

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

Figure 63. Outdoor areas more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Waves 24-25, 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=3515; Wales population n=409

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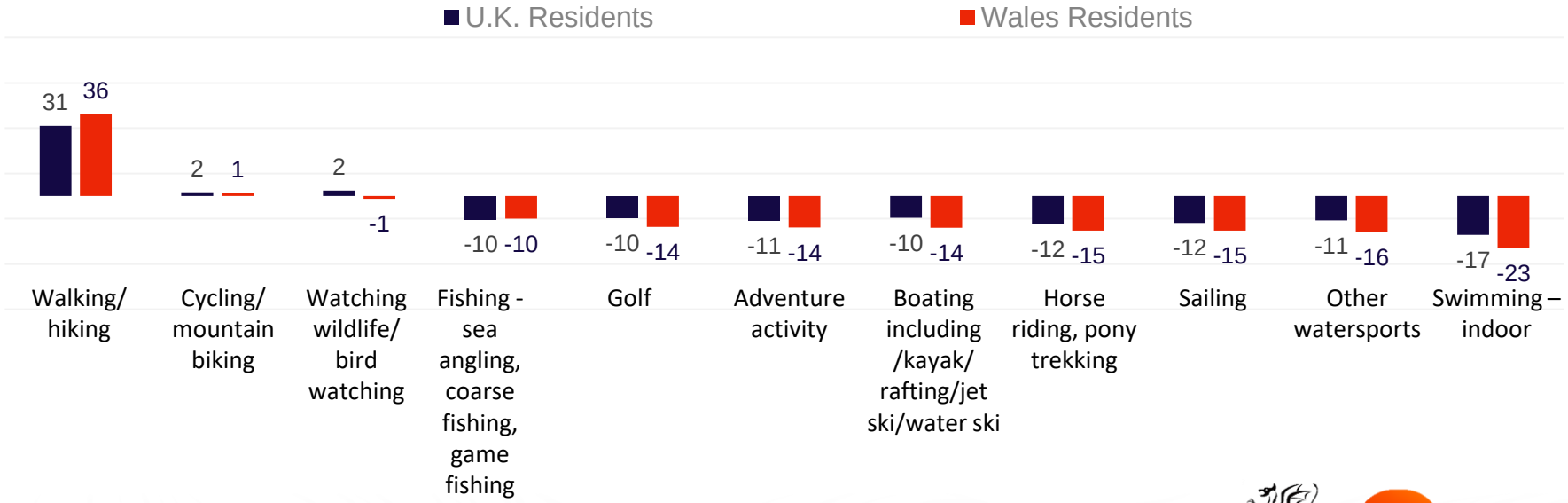
Anticipated activity compared to 'normal' in the next few months

- 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 a small/neutral anticipated increase in likelihood of watching wildlife and cycling/ mountain biking. There is likely to be a net decrease in anticipation to undertake most other outdoor activities.

Figure 64. Outdoor activities more or less likely to visit as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Waves 24-25, 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=3515; Wales population n=409

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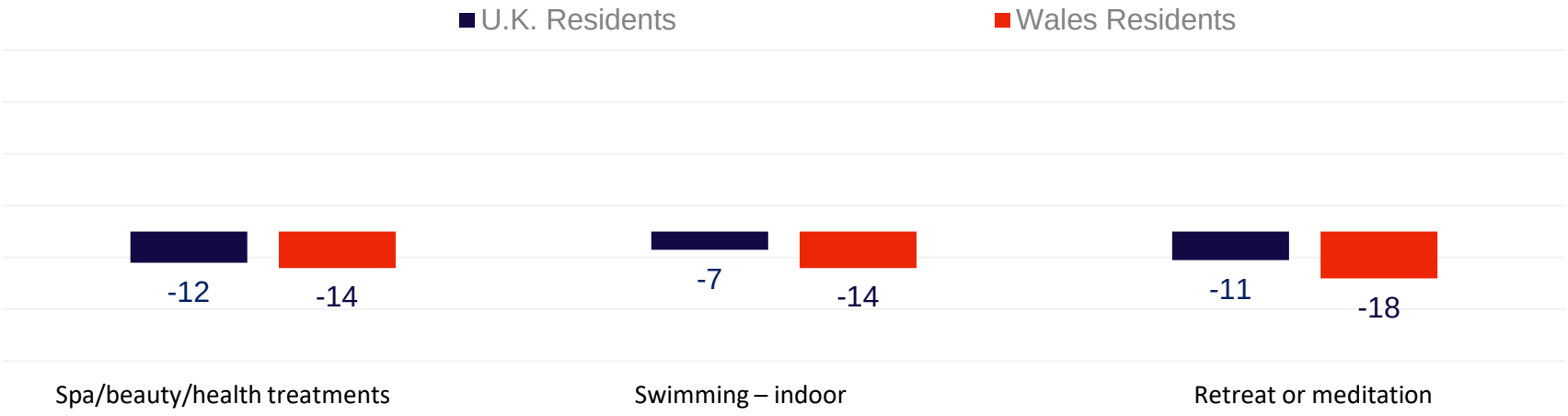
Anticipated activity compared to 'normal' in the next few months

- 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 65. Indoor health and wellness more or less likely to do compared to normal in the next few months, Net: 'more likely' minus 'less likely' Waves 24-25, 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=3515; Wales population n=409

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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 22-25 of the COVID-19 consumer tracker.