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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2021 (Waves 28-30)

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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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 28-30. This is based on fieldwork taking place during the following dates:

- **Wave 28: April 6th to April 10th 2021**
- **Wave 29: April 19th to April 26th 2021**
- **Wave 30: May 4th to May 9th 2021**

Definitions used within this report (1)

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

The below definitions are used to define overnight trip intention. In some cases each definition will be split by intention to take an overnight trip in Wales and intention to do so in the U.K.

- **All Spring Intenders:** Members of the public who state their next holiday or short break will be between May and June 2021.
- **All Summer Intenders:** Members of the public who state their next holiday or short break will be between July and September 2021.
- **All Spring/Summer Intenders:** Members of the public who state their next holiday or short break will be between May 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'

- **Over 45s that have received the vaccine**
- **Over 45s that have not received the vaccine**

The focus on over 45s 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 still exist (older, less active over 45s being more likely to have had the vaccine than younger, more active over 45s).

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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

The final chapter takes a look at overnight trips taken since restrictions started to be lifted in April 2021. At this stage results are based on small sample sizes and reflect a unique audience willing and able to travel within the restrictions that existed. The following definitions are used:

- **U.K. trip takers:** Anyone who has taken an overnight trip in the U.K. since April 2021
- **Wales trip-takers:** Anyone who has taken an overnight trip in Wales since April 2021

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Key findings

Key findings (1)

The national mood and travel confidence

1. In the latest fieldwork period (early May 2021), U.K. adults are more likely to state ‘the worst has passed’ than at any point since the start of the pandemic. The 48% stating ‘the worst has passed’ is double the proportion that said so in early-February and continues the steep rise in optimism since the start of the year.
2. A more positive outlook coincides with the highest reported comfort levels for conducting outdoor and indoor activities, including ‘going for a walk in a country park’, ‘shopping in your local shopping centre’, ‘eating at a restaurant’, ‘travelling by public transport’, ‘visiting an indoor visitor attraction’ and ‘visiting a busy city centre’.
3. Travel confidence has also increased– the proportion of U.K. adults confident a domestic overnight trip between May and September would go ahead is significantly higher than in February.
4. Increasing optimism is in part driven by the vaccine rollout – over 45s that have been vaccinated are significantly more likely to think ‘the worst has passed’ and to be confident overnight trips would go ahead than over 45s that have not had the vaccine.
5. The higher travel confidence amongst vaccinated adults means that for the first time since the start of the pandemic, retirees are the life stage most likely to be considering an overnight trip in an upcoming season (spring).
6. However, ‘having a vaccine’ is not the only influence on increasing optimism. All life stages exhibit a rise in confidence compared to the previous reporting period, and younger life stages continue to be the most confident and comfortable conducting indoor activities. The research suggests the vaccine hasn’t yet overcome concerns older generations have visiting crowded places such as busy city centres.
7. As well as making cities or large towns less appealing, COVID-19 has also influenced visitor intentions to stay closer to home than normal, to avoid busy places associated with overseas tourists and to avoid shared accommodation.
8. Broadly speaking, Wales residents are more confident than U.K. residents on the whole. This translates to higher comfort levels, and marginally higher travel confidence in the summer months. The more positive sentiment amongst Wales residents marks a reversal from previous reporting.

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Key findings (2)

Upcoming trip intentions (overnight visitors)

1. 14% of U.K. residents intend to take an overnight trip in spring (May to June), slightly lower amongst Wales residents (at 11%). Nearly a third (32%) of U.K. residents plan on taking an overnight trip in the summer, rising to 38% of Wales residents.
2. Summer intentions are significantly higher than in the previous reporting period in February, particularly amongst Wales residents, further underlining their rise in confidence.
3. Marking a notable departure from previous reporting periods, retirees are the life stage most likely to be anticipating an overnight trip in spring, with older independents close behind. Although this may in part be driven by younger life stages *already* having taken their spring trip, it also further underlines the increasing confidence levels of older age cohorts.
4. In the summer, pre-nesters and families return as the life stages most likely to take an overnight trip, although this is similar to ‘normal times’ when seasonal factors (such as school holidays) drive behaviour.
5. Positively, the vast majority of spring trips have already been planned and over half have already been booked.
6. Whilst, 2 in 5 summer trips have been planned only 3 in 10 have been booked. Many trip takers are still waiting to see and are likely to book closer to the travel date than normal.
7. Retirees and older independents are most likely to have already booked their trips across both seasons, demonstrating that their increased confidence is also translating into behaviour.
8. The South West of England is the most preferred destination for a spring or summer trip, continuing a trend that has been in place since the start of the pandemic. Wales is the second most preferred destination for a spring trip and the seventh most for a summer trip (although only marginally behind the third placed destination).
9. The majority of Wales trip intenders live elsewhere in the U.K. Three quarters of people intending to visit Wales in the summer live outside of Wales, with the North West of England and the West Midlands making up the highest proportion of trip intenders.
10. Families make up the highest proportion of people intending to visit Wales in the Spring and Summer making up 4 in 10 visitors in the Summer.

Key findings (3)

8. 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.
9. Longer trips of 4+ nights are slightly more dominant than shorter breaks amongst both Wales and U.K. intenders (particularly in the summer months), although the balance is relatively even.
10. Wales intenders for spring and summer plan on visiting a wide range of places in Wales, although there are differences depending on region of origin. Wales-residents are twice as likely to plan on staying in Pembrokeshire as any other part of Wales. Non-Wales based residents are most likely to stay in Cardiff, Snowdonia or Anglesey, although this depends on where they live in the U.K.
11. Wales intenders for spring and summer are equally likely to visit a ‘countryside or village’, ‘traditional coastal/seaside town’ or ‘rural coastline’ on their spring/summer overnight stay.
12. A range of accommodation types are being considered by Wales spring/summer intenders – with interest in caravan/camping, a private home, a hotel/motel/inn and commercial self-catering. On average, intenders are considering almost 2 accommodation types, perhaps reflecting continued uncertainty around availability and government restrictions.
13. Wales trip intenders plan to spend £100 less on their overnight trip than U.K. trip intenders. This is driven by family visitors who intend to spend nearly £200 less than the family visitor to the U.K as a whole. As in previous reporting periods, this indicates more price-sensitive visitors to Wales in the coming months.

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Key findings (4)

Upcoming leisure and Day Trip intentions

1. As of early May 2021, nearly 7 in 10 Wales residents plan on taking a day trip by this summer.
2. Day trip intentions are highest for less populated destination areas such as ‘traditional coastal/seaside town’ and ‘countryside or village’.
3. Trip intentions are lower for urban areas such as ‘a large city’.
4. Leisure intentions remain stronger for outdoor based attractions and activities.
5. ‘Garden or country park’ remains the visitor attraction type set to experience a large net increase visit intentions, but this attraction type is now joined by ‘castles, forts or other historic sites’ and ‘zoos/farm attractions’ in generating net positive visit intentions.
6. Amongst Wales residents, there is also set to be more positive engagement with some indoor attractions including ‘historic houses/palaces’, ‘scenic railways’ and ‘theme parks’
7. Both U.K. and Wales adults anticipate visiting restaurants with outdoor seating significantly more than normal in the next few months, but they also now anticipate visiting more *indoor* restaurants than normal –significantly so for Wales residents.

Upcoming Business Trips

1. Only 10% of U.K. adults in employment intend to take an overnight business trip by June 2021, dropping slightly to 8% of Wales residents.
2. A meeting is by far the most prevalent reason for an overnight trip – chosen by nearly half.

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Key findings (5)

Trips taken since April

1. 1 in 7 U.K. and Wales adults state they have taken an overnight holiday or short break since April. The vast majority of trips taken to Wales were for a ‘holiday’ purpose, a contrast to all U.K. trips which were relatively evenly divided between holidays and visits to friends or relatives.
2. The profile and behaviour of overnight UK trip-takers since April is relatively unique, perhaps reflecting ongoing restrictions and the large proportion of visits to friends or relatives.
3. Over half of trips taken since April were by the family life stage and the East Midlands and East of were the two most visited regions for U.K. trips
4. ‘Larger city’ is the most visited destination type for U.K. trips taken since April, although ‘mountains or hills’ and ‘countryside or village’ are the most visited destination types for Wales trip-takers.
5. The vast majority of U.K. and Wales trip takers were able to take their overnight domestic trip in the destination they originally planned.
6. Amongst both U.K. and Wales trip-takers ‘caravan/camping’ and ‘commercial self-catering’ were the two leading accommodation types for trips taken since April. ‘Private home’ was also a leading accommodation type for U.K. trip-takers driven by the high proportion of visits to friends or relatives.

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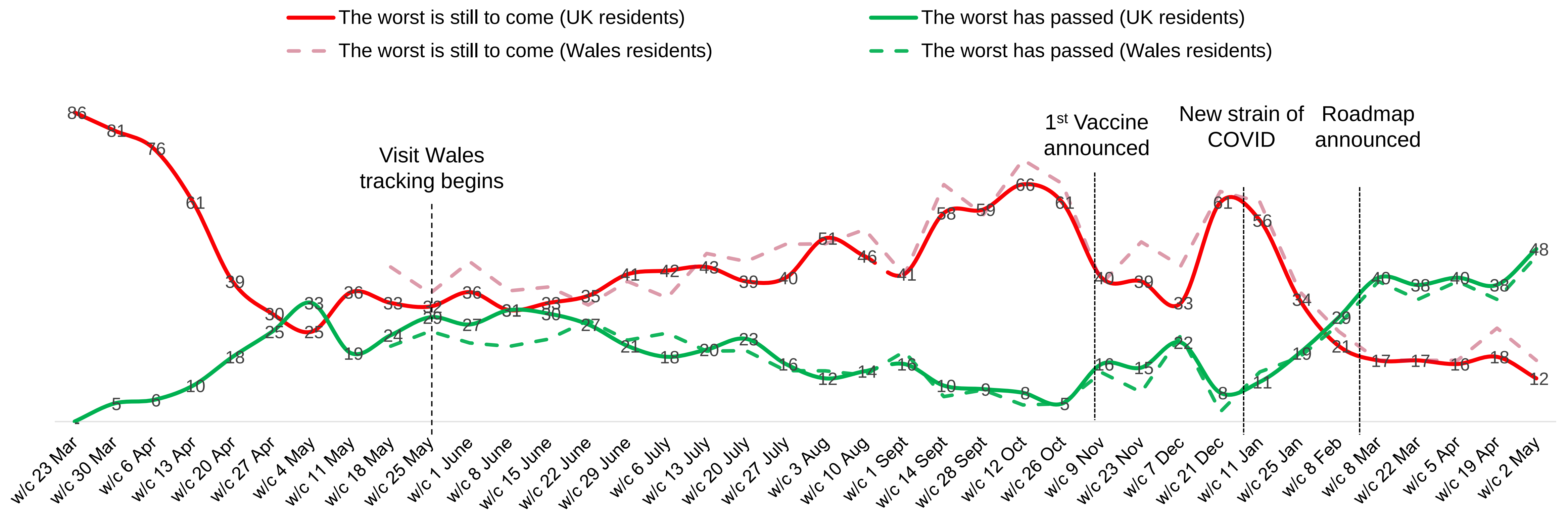
National sentiment

Perceptions of the situation in relation to COVID-19

- As of early May (Wave 30), the proportion of U.K. adults stating the ‘worst has passed’ in relation to COVID-19 was higher than at any point since the beginning of the pandemic – at 48% continuing the steep rise in optimism since the start of the year. Perceptions amongst Wales residents broadly track those of the wider U.K. population.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-30, 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’, followed closely by ‘older independents’. Optimism in relation to COVID-19 correlates strongly with vaccine uptake – over 45s that have had a vaccine significantly more positive than over 45s that haven’t.
- Although older age groups demonstrate the highest levels of optimism, all life stages are significantly more likely to believe ‘the worst has passed’ than in the previous reporting period in mid-February.

Figure 2. Perception of the situation with regards to COVID-19, Wave 30, Percentage U.K. and Wales

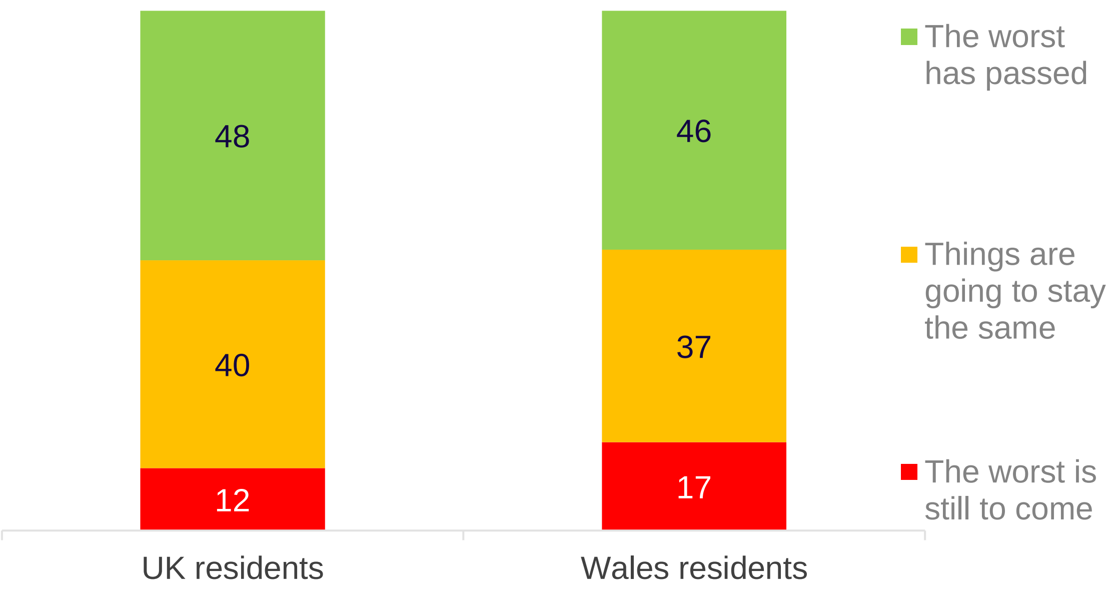
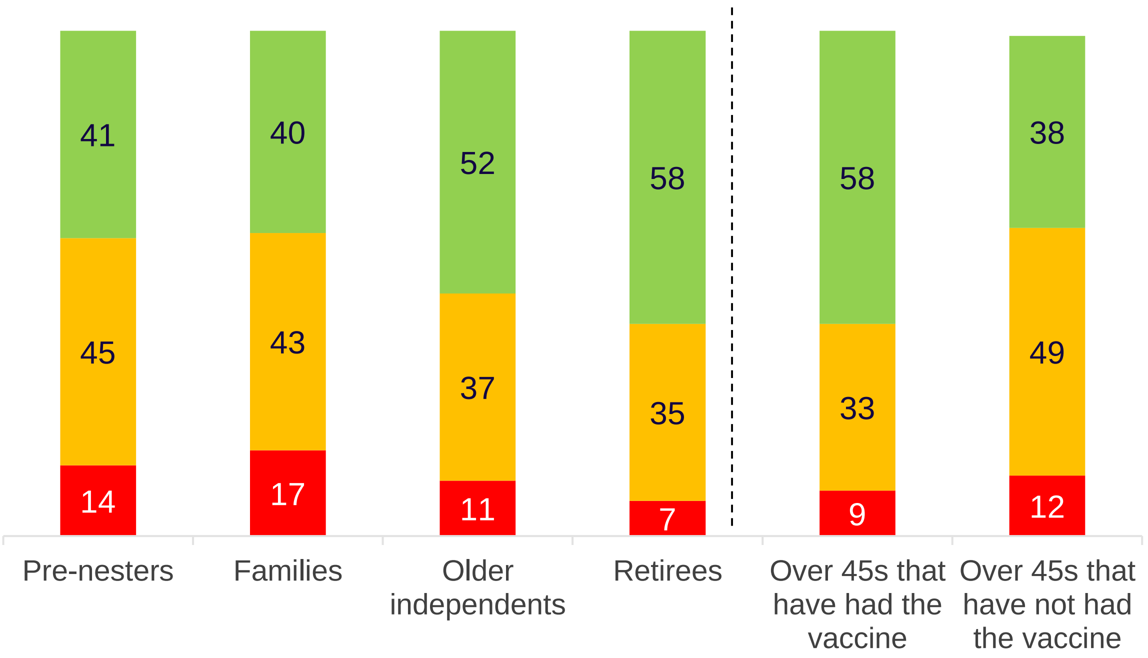


Figure 3. Perception of the situation with regards to COVID-19 by life stage, Wave 30, Percentage, U.K.



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=1,758; All Wales respondents n=207; Pre-nesters n=363; Families n=554; Older Independents n=500; Retirees n=341; Over 45s that have had the vaccine n=694; Over 45s that have not had the vaccine n=150

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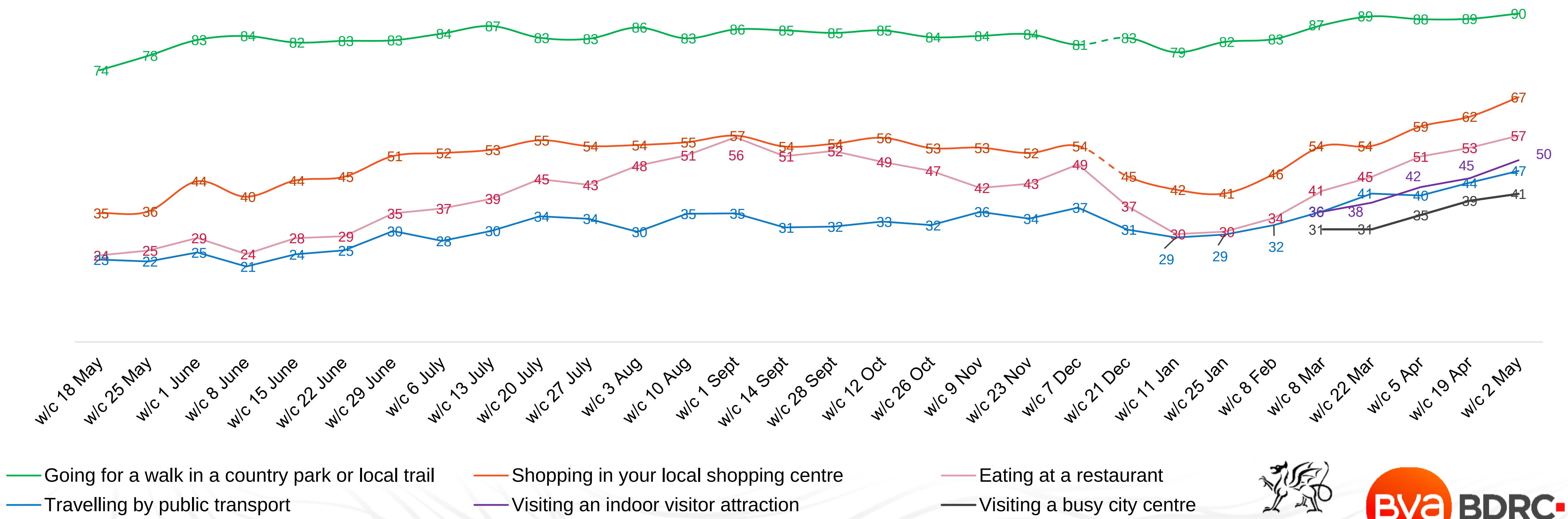
Level of comfort undertaking activities

- 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. The latest wave marks the first time comfort with this activity has hit 90%.
- Comfort with indoor activities are also at their highest to date – rebounding after a slump in December and at the start of the year. Comfort with ‘travelling by public transport’ and ‘visiting a busy city centre’ has steadily increased in recent waves, although at a lower rate than other indoor activities.

Figure 4. Level of comfort conducting individual activities*, Net very and fairly comfortable, Percent, Waves 1-30, 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. *New activities added from Wave 26 (w/c 8 Mar)

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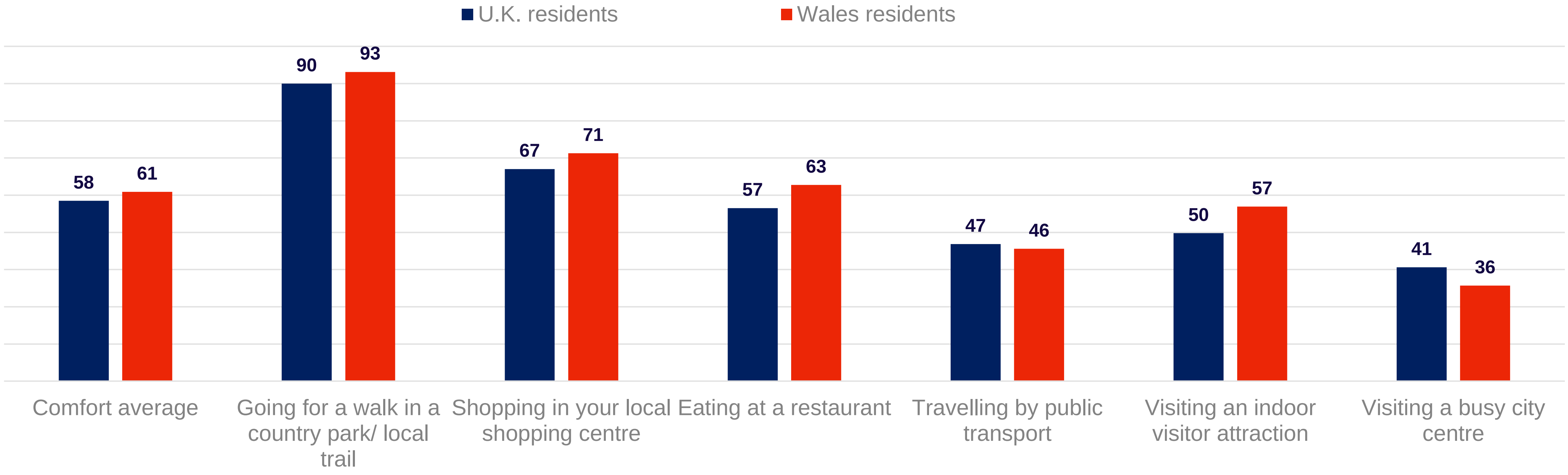
Level of comfort undertaking activities with a ‘comfort average’

- Wales residents are marginally more comfortable conducting everyday activities than U.K. adults - at an average level and with the majority of individual activities. Two exceptions to this include ‘visiting a busy city centre’ and ‘travelling by public transport’ where U.K. residents show higher comfort levels. The higher comfort levels of Wales residents relative to the wider U.K. population marks a reversal of previous reporting.
- Both U.K. and Wales residents exhibit significantly higher comfort levels with all activities compared to mid-February 2021.

Figure 5. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 30, 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=1,758; All Wales respondents n=207

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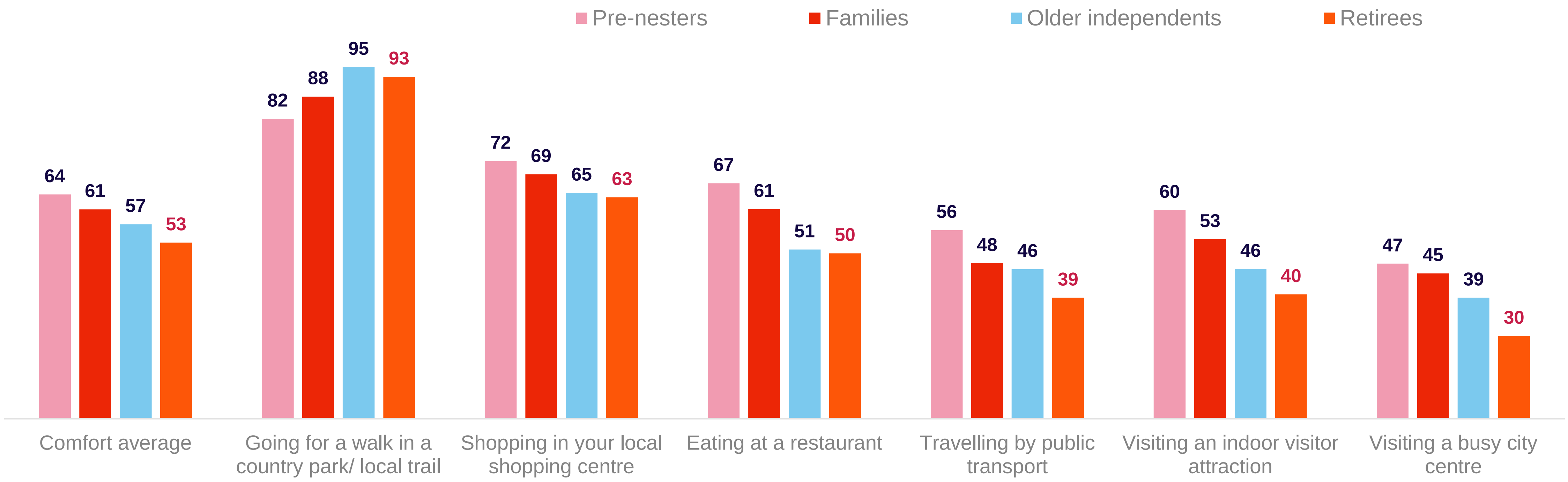
Level of comfort undertaking activities with a 'comfort average'

- Despite being the life stage most likely to state 'the worst has passed', retirees remain the least likely to feel comfortable doing everyday activities, particularly 'visiting a busy city centre'.
- Comfort levels with indoor activities generally correlate with age, 'pre-nesters' the most comfortable, followed by 'families'.
- Retirees are notably less confident travelling by public transport, indoor attractions and visiting a busy city centre.

Figure 6. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Wave 30, 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=363; Families n=554; Older Independents n=500; Retirees n=341;

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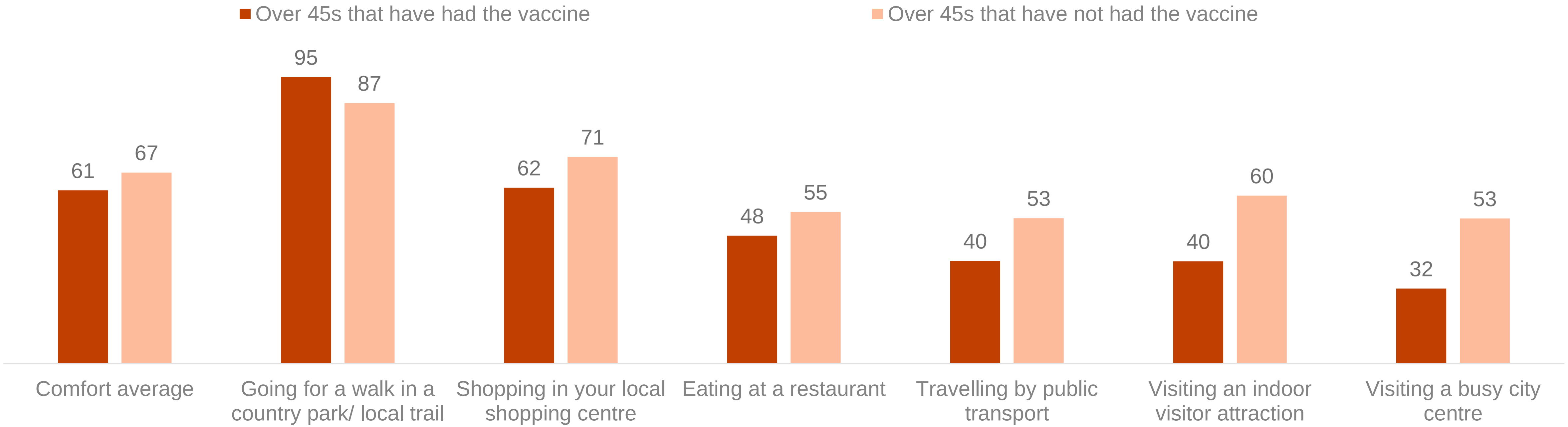
Level of comfort undertaking activities with a 'comfort average'

- Over 45s that have had the vaccine are less likely to be comfortable with conducting activities indoors than over 45s that have *not* had the vaccine. This further underlines that comfort levels are predominantly driven by generation, rather than vaccine uptake – over 45s that have had the vaccine tend to be at the older end of this age cohort than those that haven't.
- That said, it's worth noting that over 45s that have had a *second dose* of the vaccine tend to be more comfortable than those that have had just the one dose, suggesting that the vaccine does have *some* impact on comfort levels.

Figure 7. Level of comfort conducting activities by vaccine status, Net very and fairly comfortable, Percent, Wave 30, U.K.



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: Over 45s that have had the vaccine n=694; Over 45s that have not had the vaccine n=154

Perceptions of when things will return to normal

- Only 1 in 5 (19%) U.K. residents anticipate life returning to something close to normal by September, and less than half (47%) by the end of the year. Wales residents tend to anticipate normality later, only 2 in 5 by the end of the year.
- In a reversal of optimism around COVID-19, younger life stages anticipate normality significantly sooner than older life stages.
- Together, these figures and comfort levels suggest that although older life stages are the most likely to state the 'the worst has passed', this may be driven by them emerging from a more negative experience of the pandemic, and does not indicate that they think that the 'COVID *environment*' has passed.

Figure 8. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Wave 30, UK and Wales

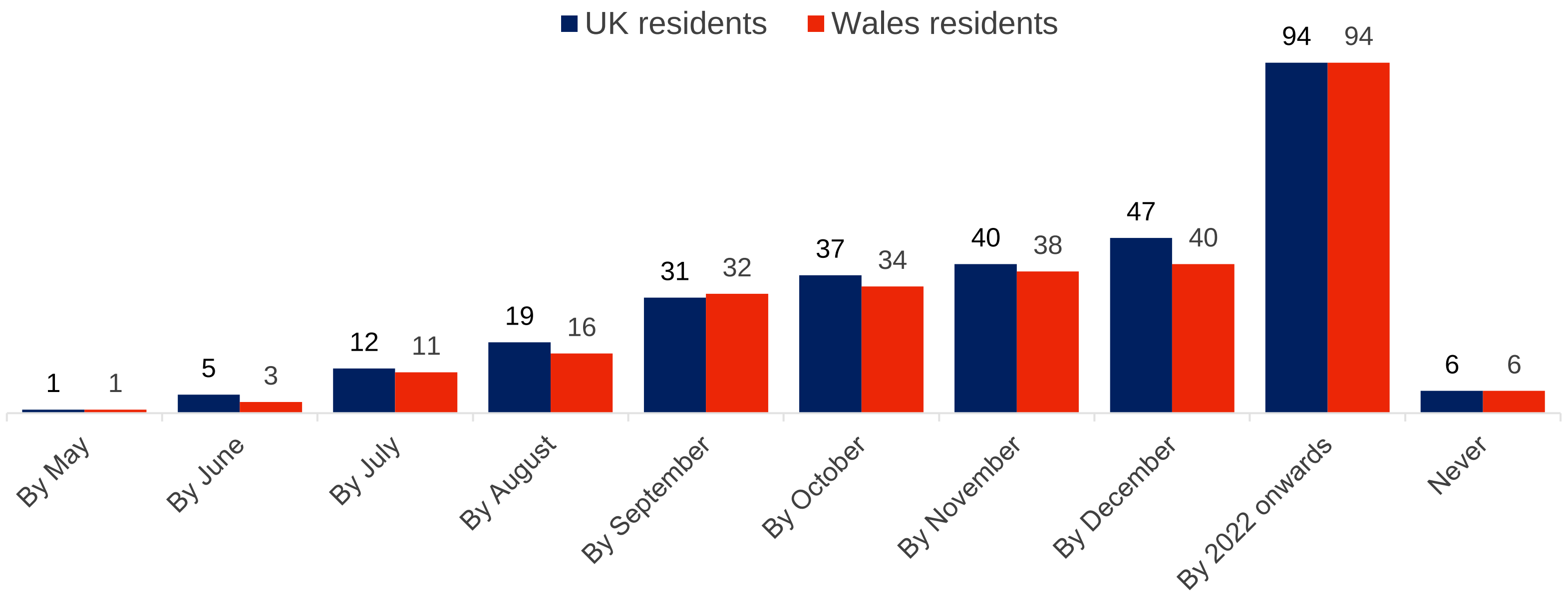


Table 1. Normality by September by sub-group

Audience	%
Pre-nesters	39%
Families	34%
Older independents	23%
Retirees	29%
Over 45s that have had the vaccine	25%
Over 45s that have not had the vaccine	29%

Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All U.K. respondents. n=1,758; All Wales respondents n=207; Pre-nesters n=363; Families n=554; Older Independents n=500; Retirees n=341; Over 45s that have had the vaccine n=200; Over 45s that have not had the vaccine n=458

Financial segments and financial impact of COVID-19

- 13% of the U.K. population and 12% of the Wales population consider themselves 'hit hard financially' by the pandemic, with around 1 in 7 describing themselves as 'better off than before'. Notably, both U.K. and Wales residents report a more positive financial status than in the previous reporting period in mid-February 2021.
- Around 2 in 5 of U.K. and Wales residents of working age currently have their employment impacted by COVID-19 – lower than in mid-February 2021.The proportion currently on furlough has dropped significantly since that point.

Figure 9. Breakdown of residents by financial segments, Percentage, Wave 30, U.K. and Wales

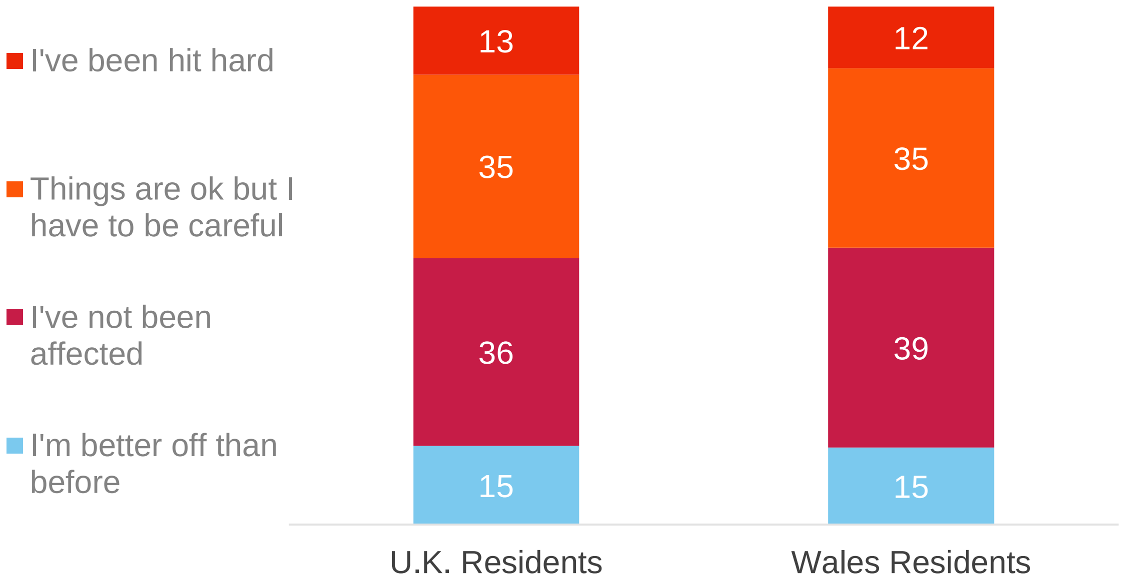
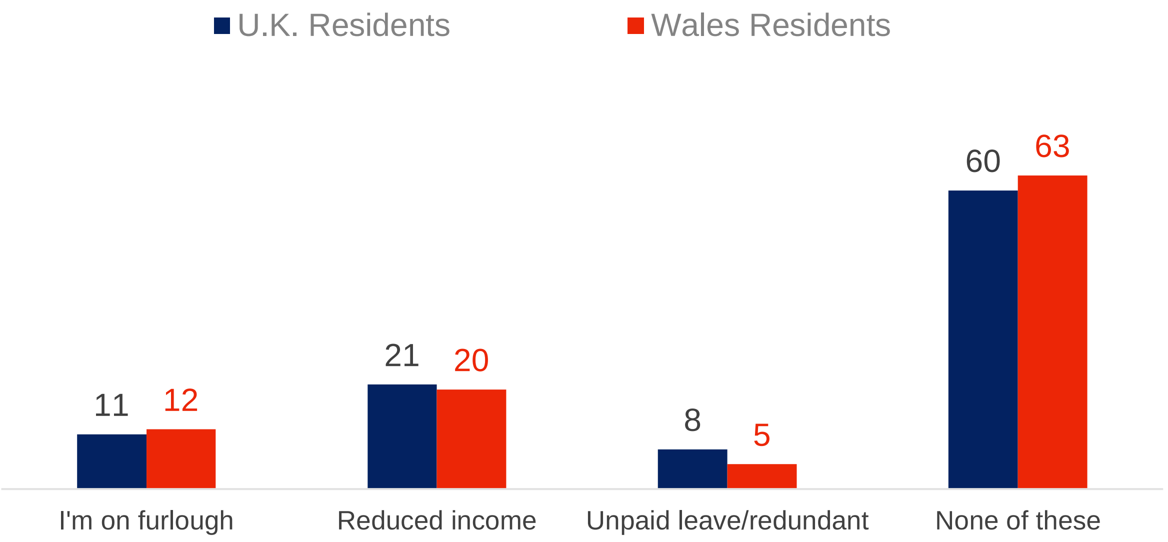


Figure 10. Employment impact of COVID-19, Percentage, Wave 30, U.K. and Wales of working age*



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=1,758; All Wales respondents n=207 *Working age defined as under 65.

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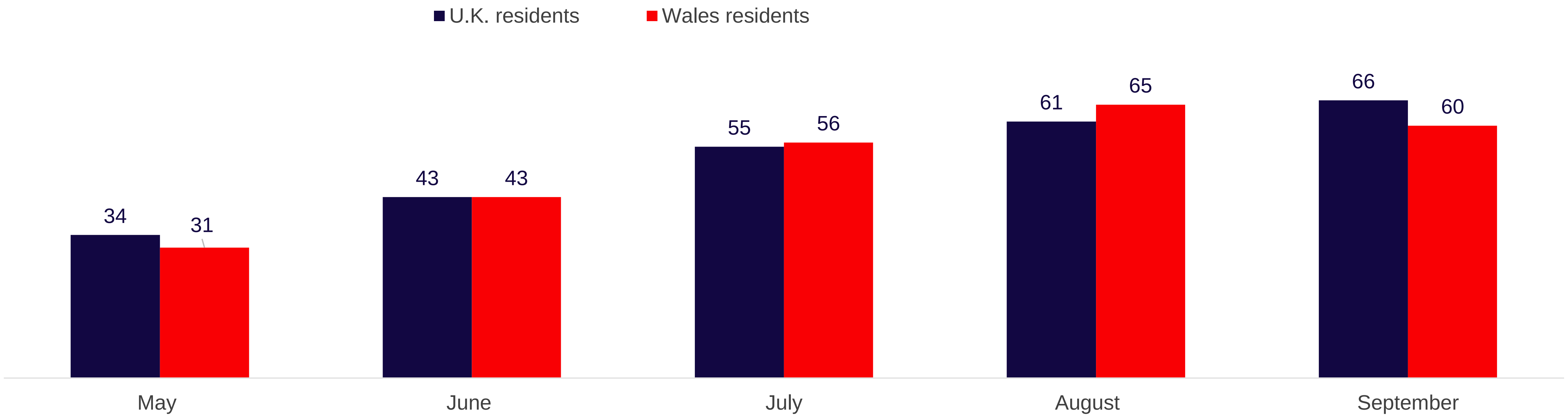
Travel confidence

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

- Domestic travel confidence has risen significantly since the previous reporting period in mid-February 2021. 34% of U.K. adults are now confident that a U.K. overnight trip would go ahead as planned in May this year (a rise of 14 percentage points), 43% for June trips (+11 percentage points), 55% for July (+13 percentage points) and 61% in August (+10 percentage points).
- Confidence amongst Wales residents is now level with confidence across the U.K., a reversal on previous reporting periods, where it tracked behind.

Figure 11. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Wave 30, U.K.



QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the 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=1,758; All Wales respondents n=207

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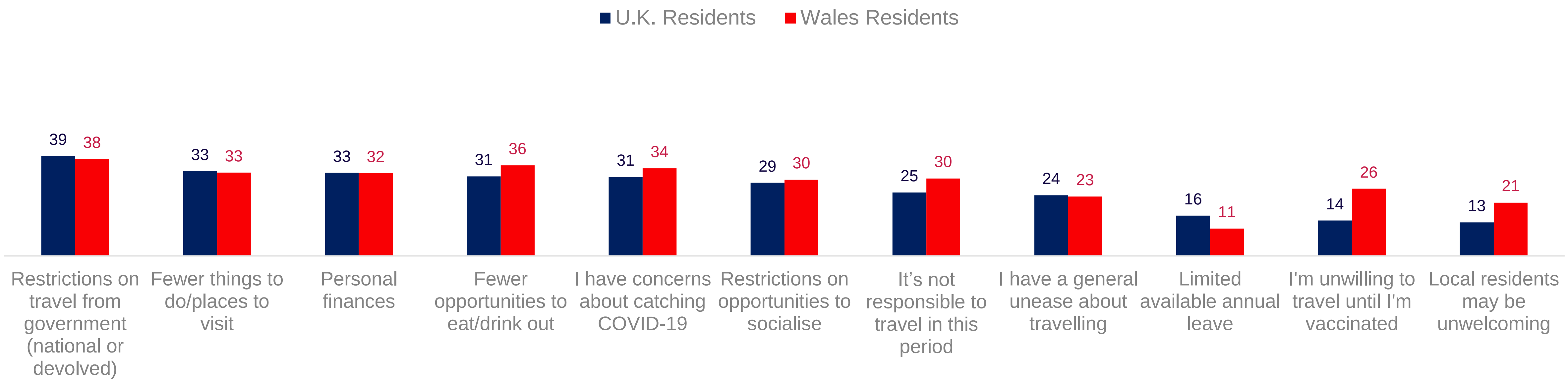
Reasons for not feeling confident taking Spring/Summer trips in the U.K.

- 'Restrictions on travel from government' is the leading reason for lack of confidence in domestic overnight trips going ahead between May and September this year. This was also the leading reason for low confidence in the previous reporting period, but the incidence stating it was significantly higher (59% compared to 39%).
- It's notable that 'personal finances' is a 'top 3 reason' for the first time.
- Wales residents are more likely to believe it is not responsible to travel and to be unwilling to travel until vaccinated.

Figure 12. Reasons for not being confident about travelling in May to September, Percentage, Waves 29-30, 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 May and September? Base: All U.K. Respondents not confident travelling between May and September. n=1,518; All Wales respondents n=164. *Wave 29 included to increase base sizes

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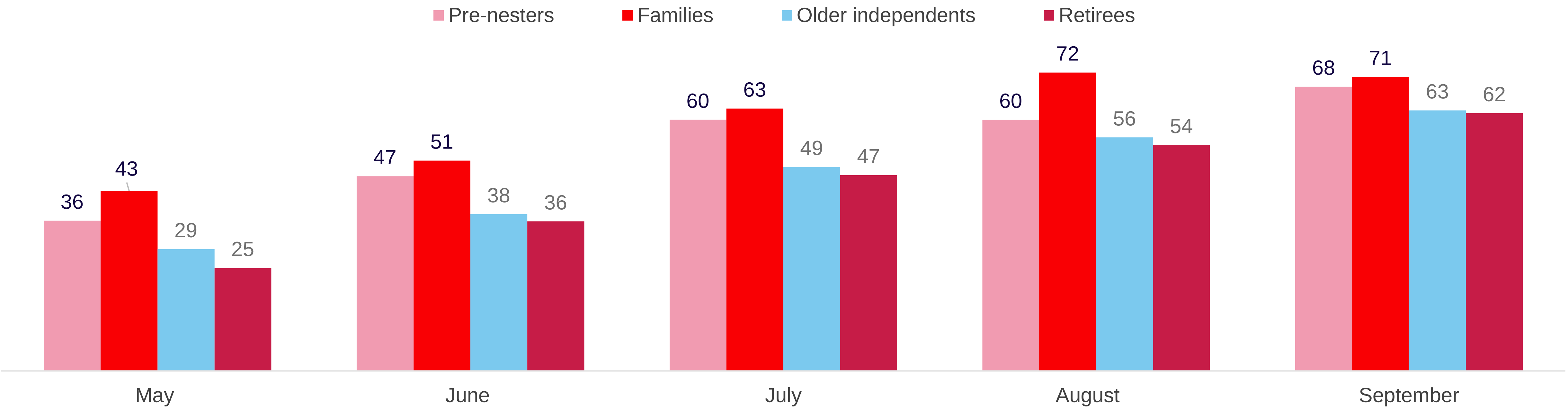
Confidence in the ability to take a U.K. short break or holiday

- Consistent with 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 May and September.
- Pre-nesters and families are more confident they able to take a trip in the next 3 months.
- However, it should be noted that confidence has increased across all life stages since the previous reporting period in mid-February 2021.

Figure 13. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Wave 30, 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=363; Families n=554; Older Independents n=500; Retirees n=341

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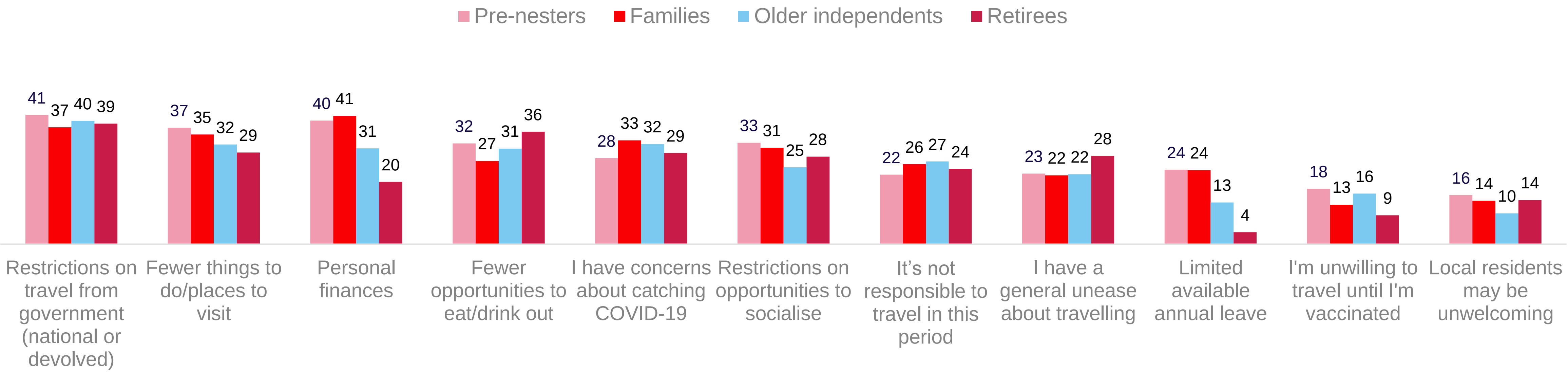
Reasons for not feeling confident taking trips in the U.K.

- There is minimal separation in the proportions of each life stage citing ‘restrictions on travel from government’ as a reason for low confidence in travel between May and September. Other reasons, however, separate quite significantly.
- ‘Pre-nesters’ and ‘families’ are more likely to cite ‘fewer things to do/places to visit’, ‘personal finances’ and ‘limited leave’.
- ‘Retirees’ are more likely to state ‘a general unease about travel’. Notably, ‘retirees’ index lower than average on ‘concerns about catching COVID-19’, marking a departure on all previous reports where they indexed significantly higher. This provides further evidence that the vaccine has had a positive impact on attitudes amongst this age cohort.

Figure 14. Reasons for not being confident about travelling in May to September, Percentage, Waves 29-30, U.K. and Wales

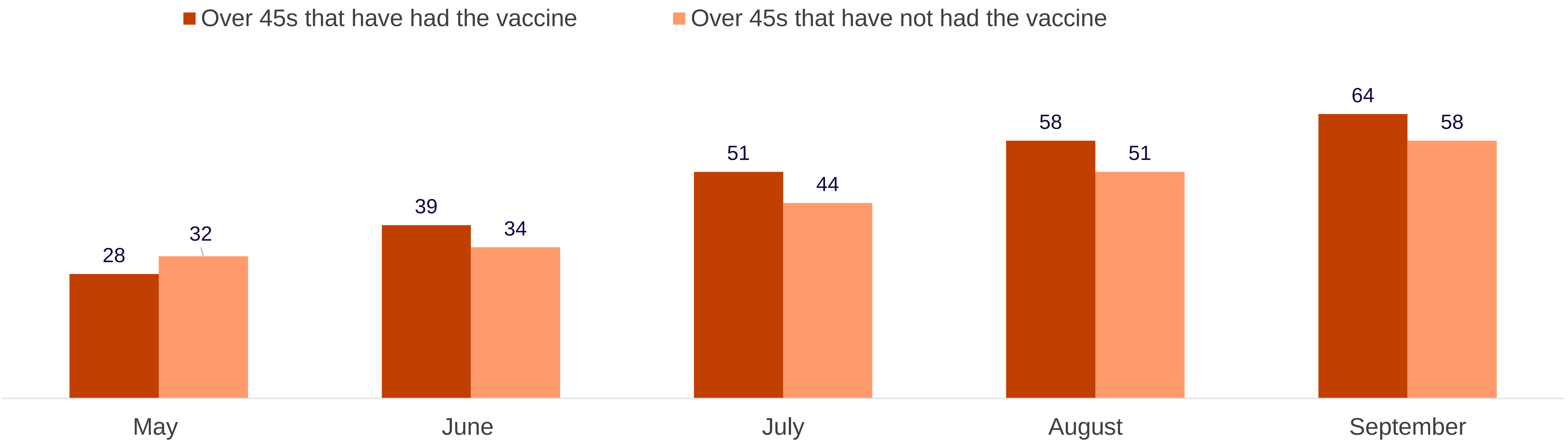


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between May and September? Pre-nesters n=255; Families n=292; Older Independents n=306; Retirees n=222

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

- Over 45s that have had the vaccine are more confident than over 45s that have not had the vaccine that U.K. overnight trips would go ahead from June through to September, further underlining that – despite lower comfort levels, and a longer perceived lead time to normality – they exhibit higher optimism around COVID-19.

Figure 15. Confidence in taking a U.K. overnight trip across a range of different months by vaccine status, Net percentage very and fairly confident, Wave 30, U.K.

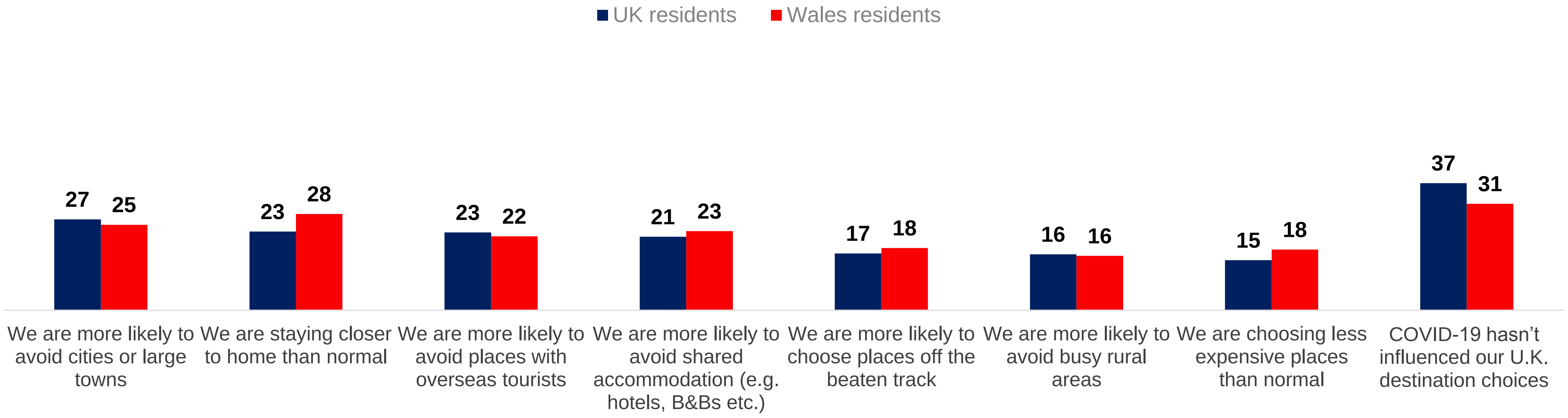


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Over 45s that have had the vaccine n=694; Over 45s that have not had the vaccine n=154

Impact of COVID on destination choice

- Generally, COVID-19 has had some impact on destination choice for the majority of U.K. adults.
- ‘We are more likely to avoid cities or large towns’ is the leading outcome, although this is followed closely by a range of other factors such as ‘we are staying closer to home than normal’, ‘we are avoiding places with overseas tourists’ and ‘we are more likely to avoid shared accommodation’.
- Welsh residents are more likely to indicate they are staying closer to home and are choosing less expensive places than normal.

Figure 17. Impact of COVID-19 on destination choice, Percentage Wave 30, U.K. and Wales

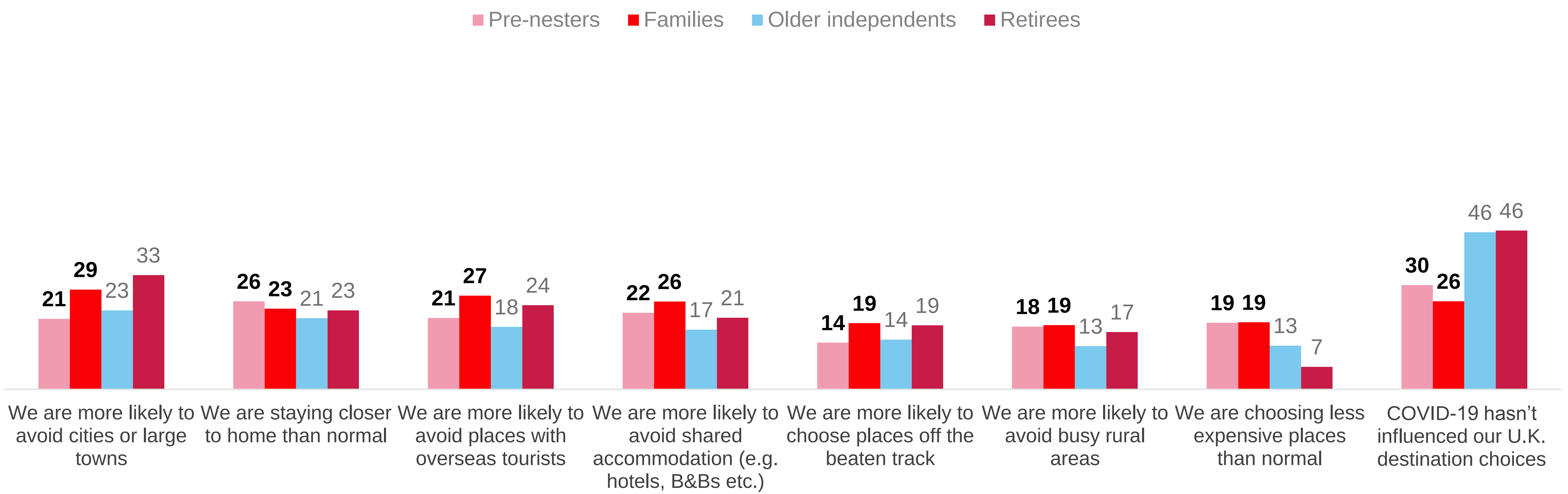


VB13fiii. Compared to normal, how if at all would you say COVID-19 has influenced your choice of destination for U.K. holidays or short breaks? Base: All wave 30 respondents. U.K. residents n=1,758. Wales residents n=207.

Impact of COVID on destination choice by life stage

- There is a little variation in the impact of COVID-19 on destination choice across life stages. That said, retirees are more likely than any other life stage to say they are avoiding cities and large towns. Pre-nesters and families are the most likely to say they are choosing less expensive places than normal.

Figure 18. Impact of COVID-19 on destination choice by life stage, Percentage Wave 30, U.K. by life stage



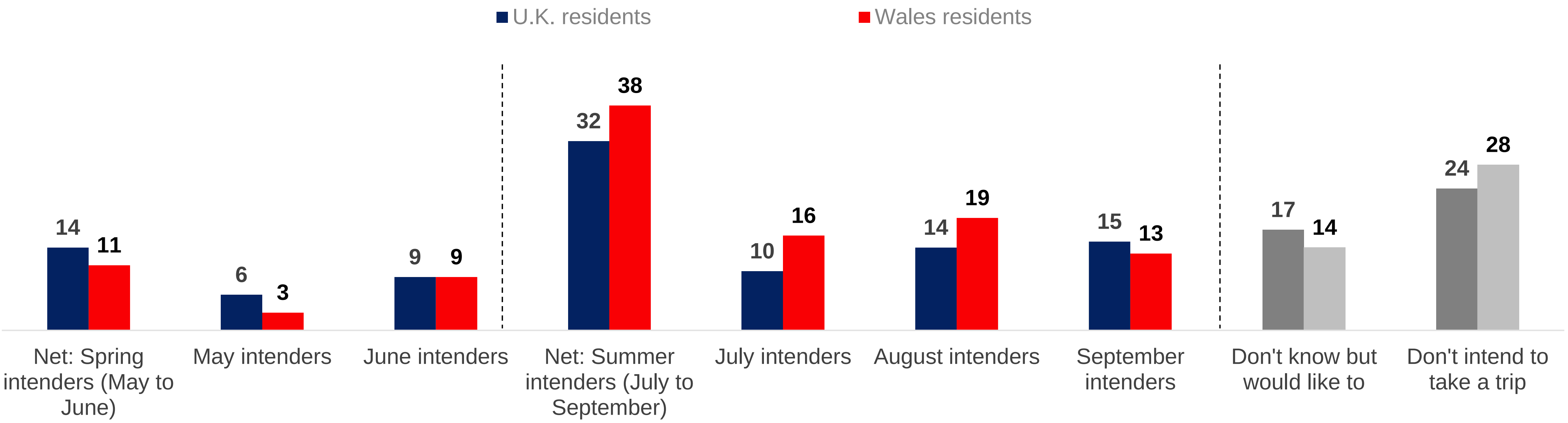
VB13fiii. Compared to normal, how if at all would you say COVID-19 has influenced your choice of destination for U.K. holidays or short breaks? Pre-nesters n=363; Families n=554; Older Independents n=500; Retirees n=341

Upcoming trip intentions

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

- 1 in 7 U.K. adults and 1 in 9 Wales adults anticipate taking an overnight short break or holiday in spring this year (between May and June), the balance more heavily skewed in June.
- In the summer, nearly a third (32%) of U.K. residents and nearly 2 in 5 (38%) Wales residents plan on taking an overnight domestic trip – two figures that have increased significantly since the previous reporting period in mid-February 2021.
- Amongst U.K. adults, August and September generate the highest proportion of trip-takers – for Wales-based adults, it's August.
- Notably, the proportion of both U.K. and Wales adults not planning on taking any domestic overnight trips is significantly lower than in mid-February 2021.

Figure 19. Proportion anticipating an overnight U.K. trip in each time period, Percentage, Wave 30, 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 28-30 U.K. population n=1,758; Wales population n=207.

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Proportion anticipating an overnight trip in spring and summer

- Notably, retirees are the life stage *most* likely to take a spring overnight domestic trip – a contrast to previous reporting periods where they have consistently indexed the lowest for trip intentions
- In the summer, pre-nesters and families are the most likely to take an overnight U.K. trip. This is in part driven by seasonal factors (such as school holidays) and is consistent with previous reporting, but it should be noted that the incidence of summer trip intention has risen across all life stages.

Figure 20. Proportion anticipating an overnight U.K. trip in spring by life stage, Percentage, Wave 30, U.K.

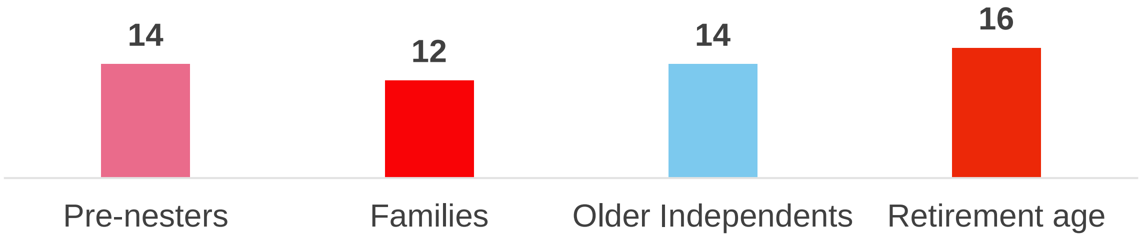
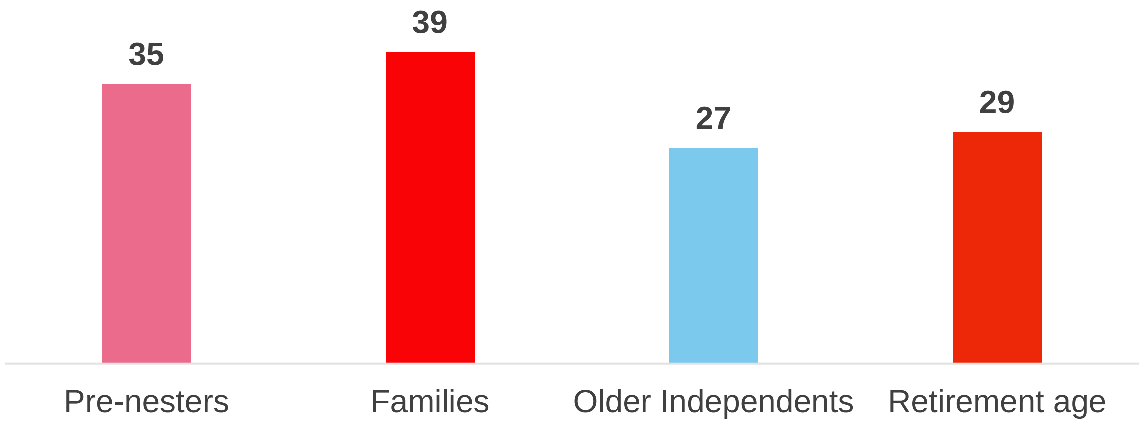


Figure 21. Proportion anticipating an overnight U.K. trip in summer by life stage, Percentage, Wave 30, U.K.



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=363; Families n=554; Older Independents n=500; Retirees n=341; Over 45s that have had the vaccine n=200; Over 45s that have not had the vaccine n=458

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Whether planned or booked holiday or short break yet

- The majority of spring intenders have already planned (69%) and already booked (54%) their next spring trip.
- Nearly 2 in 5 (37%) summer intenders have planned their summer trip but only 3 in 10 (29%) have booked it.
- All planning and booking figures have risen significantly since the previous reporting period, reflecting the rise in domestic travel confidence.
- However, there are a high proportion of trip intenders in Spring and Summer who have yet to book and are still waiting to see.

Figure 22. Proportion of spring intenders that have already planned and booked their trip , Percentage Wave 30, U.K.

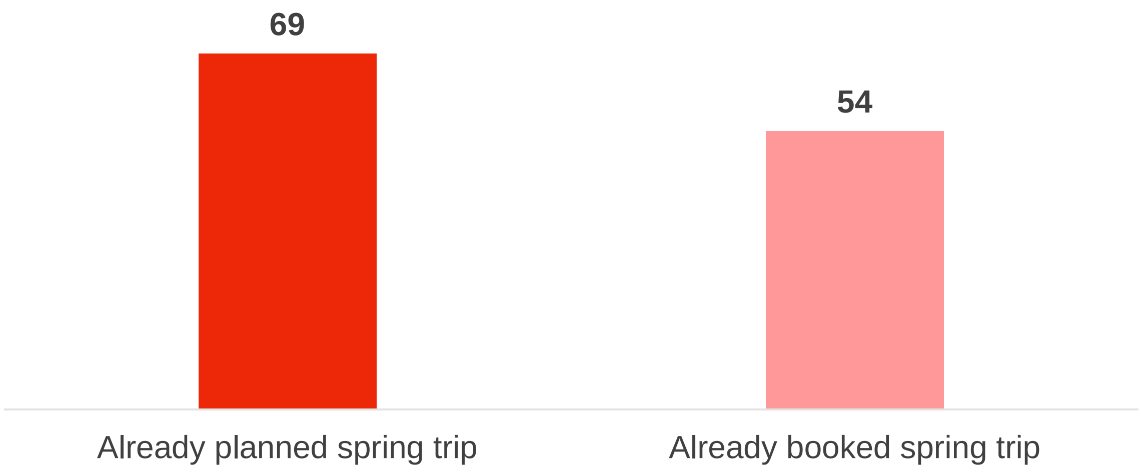
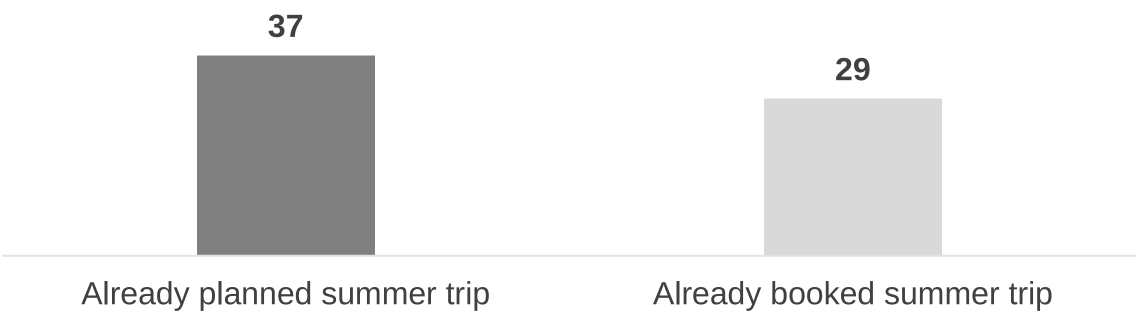


Figure 23. Proportion of summer intenders that have already planned and booked their trip , Percentage Wave 30, U.K.



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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Whether planned or booked holiday or short break yet

- As well as exhibiting the highest intention to take a spring trip, older independents and retirees are also the life stages most likely to have already *booked* their spring trip – although families are the most likely to have already started planning it.
- Retirees and older independents are also most likely to have booked their *summer* trip, further underlining their renewed travel confidence.

Figure 24. Proportion of spring intenders that have already planned and booked their trip by life stage , Percentage Wave 30, U.K.

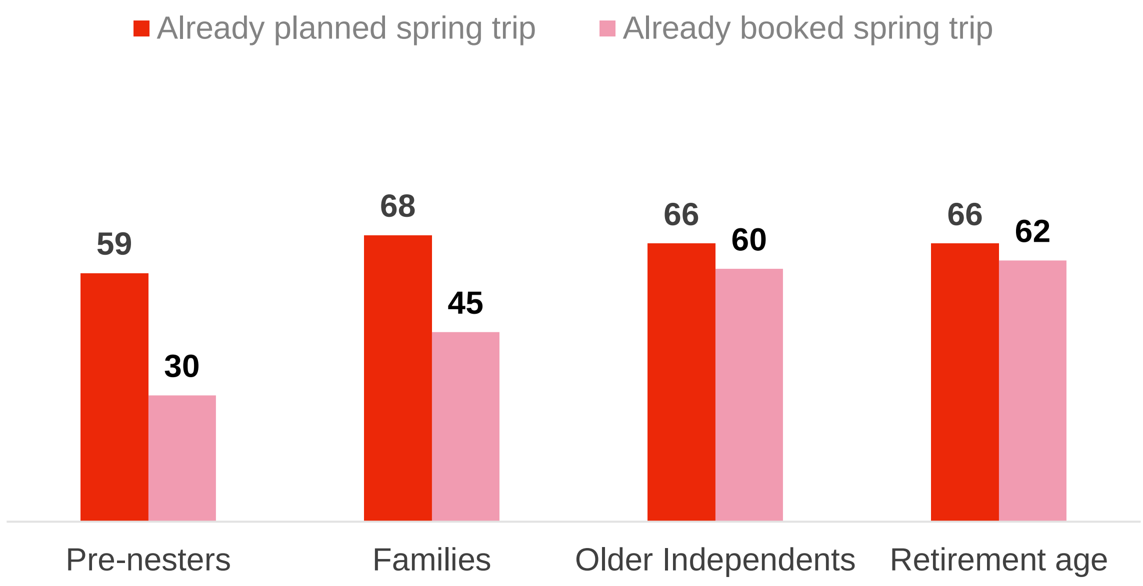
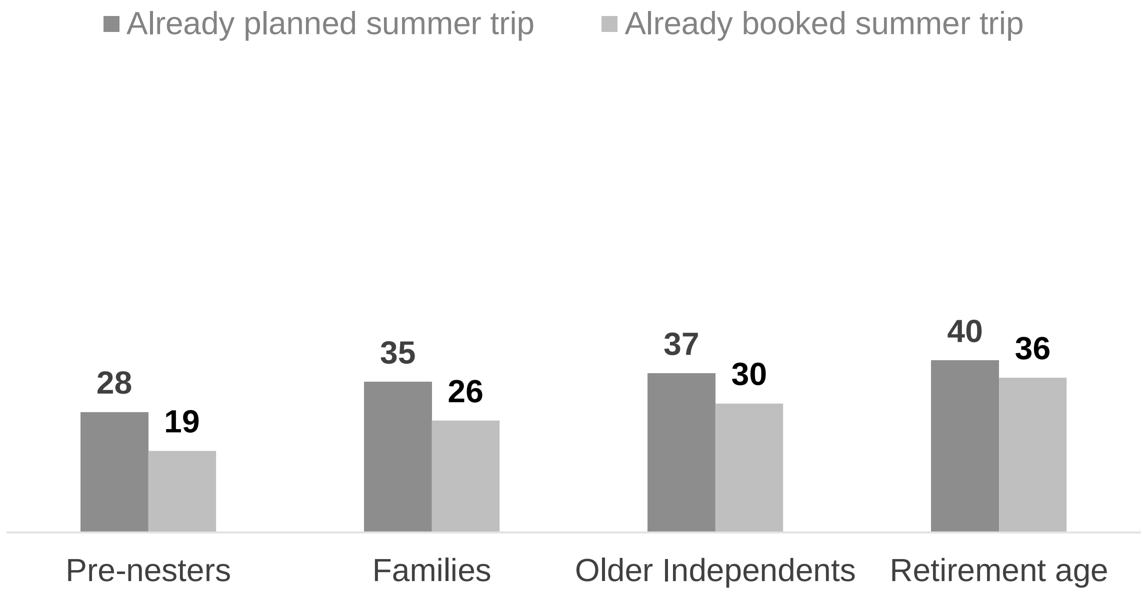


Figure 25. Proportion of summer intenders that have already planned and booked their trip by life stage , Percentage Wave 30, U.K.



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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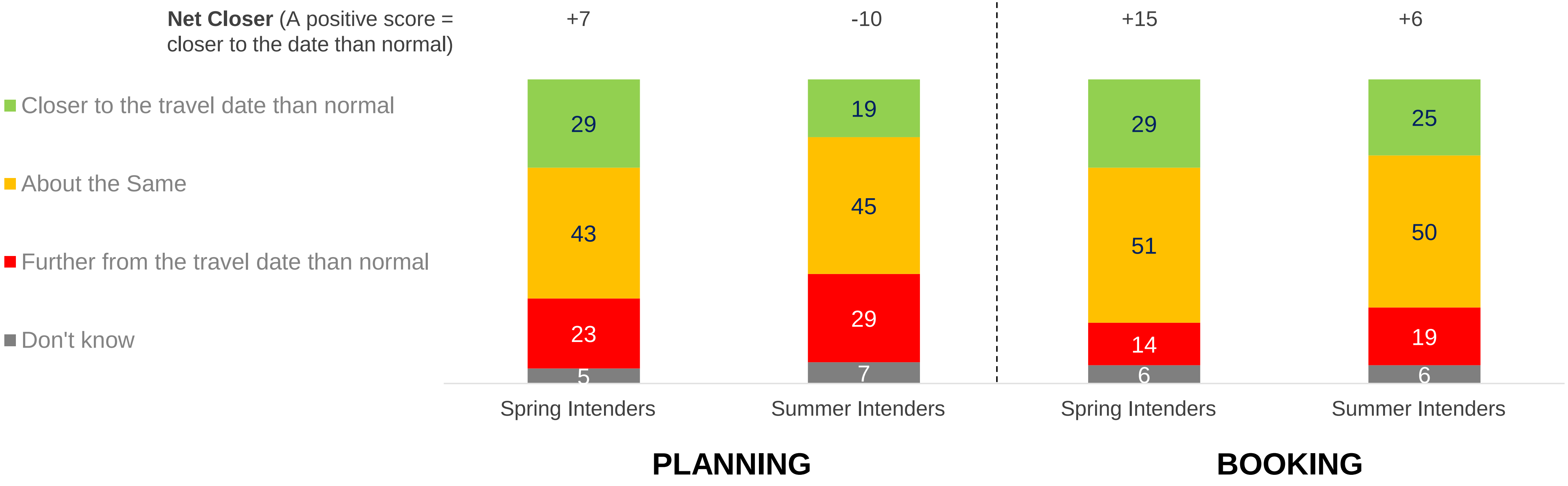
Anticipated planning and bookings lead times

- U.K. adults planning on taking a spring overnight domestic trip indicate that both the planning and booking are likely to be closer to the travel date than 'normal', although the most common answer is that they are the same (around half stating this).
- On balance, summer trips are likely to be planned further from the date than normal, but booked marginally closer than normal. Again though, around half indicate that planning and booking will be the same as normal.

Figure 26. Planning and booking lead times for Spring and Summer trips compared to normal, Percentage Wave 30, U.K.



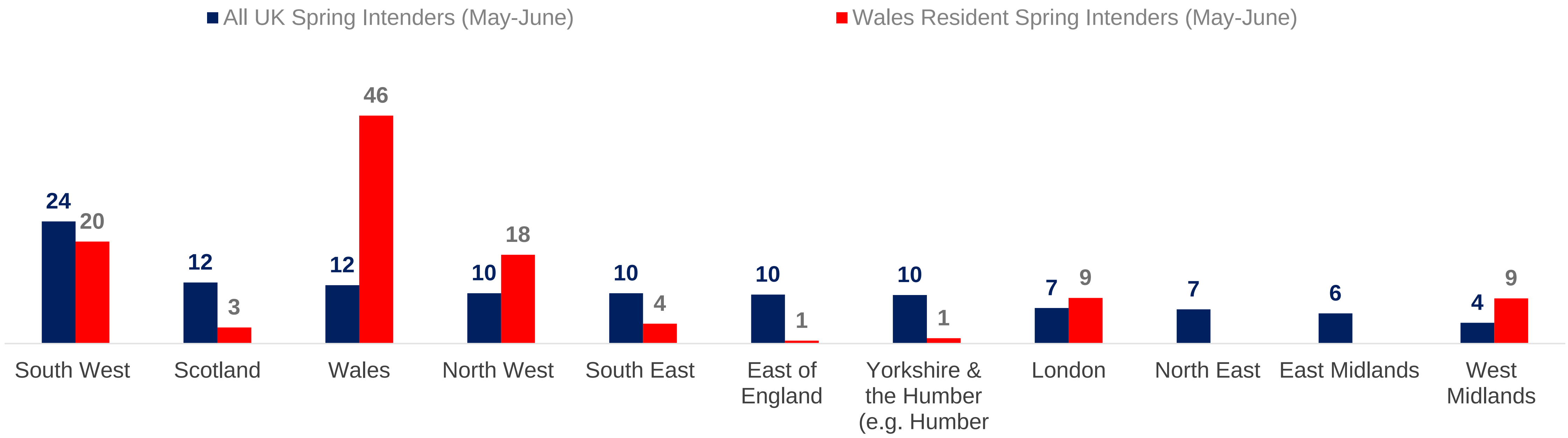
VB6diic. Compared to normal, when did or will you plan and book your next UK trip? Base: Spring intenders n=241; Summer intenders n=441

Profiling spring and summer overnight trips to Wales

Where planning on staying on next U.K. trip in Spring

- 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 second most preferred, joint with Scotland at 12%.
- Amongst Wales resident trip intenders, nearly half (46%) will take their next overnight trip in Wales – the South West and North West of England the most popular alternative destinations.

Figure 27. Where planning on staying on next U.K. overnight trip in spring, Percentage, Waves 28-30, 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=641, Wales Resident Intenders (Spring) n=64

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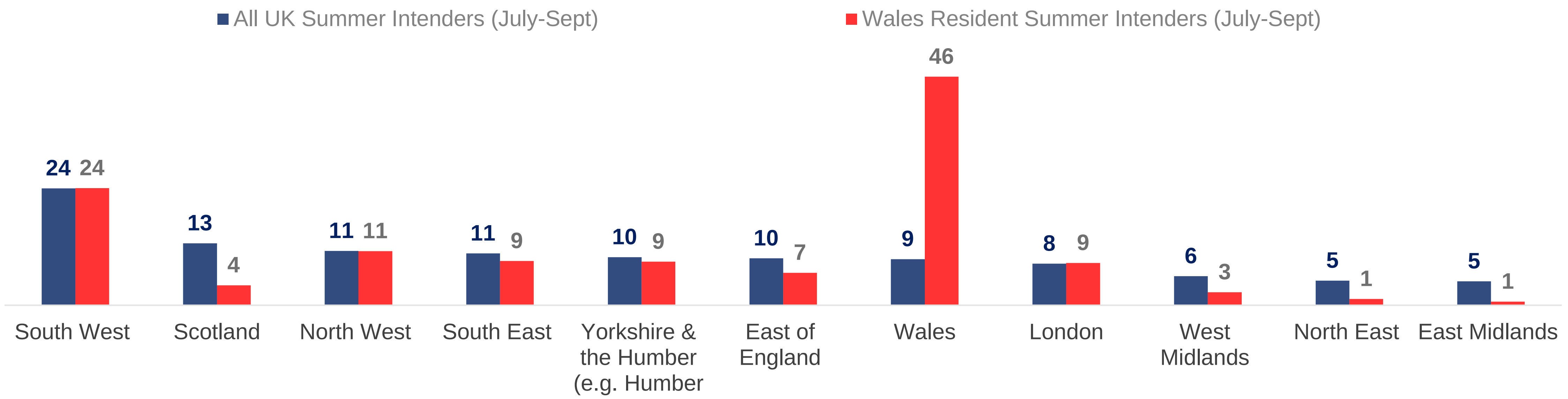
Where planning on staying on next summer U.K. trip

- 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.
- Wales is the seventh most preferred destination in the summer months, although is separated by only 2 percentage points (a non-statistically significant margin) from the third most preferred destination choice (the North West of England).
- Identical to spring, 46% of Wales resident intenders are planning on taking their next overnight trip in Wales.

Figure 28. Where planning on staying on next U.K. overnight trip in Summer, Percentage, Waves 28-30, 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=1,364, Wales Resident Intenders (Summer) n=170

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Intention to visit Wales by region of residence

- As outlined on the previous two pages, nearly half of Wales resident intenders in both spring and summer plan on taking their next domestic break in Wales. However, the vast majority of Wales intenders live *outside* of Wales – neighbouring English regions the North West and the West Midlands the most likely to provide visitors.

Figure 29. Intention to take a trip to Wales by region of residence, Percentage, Waves 28-30, U.K.

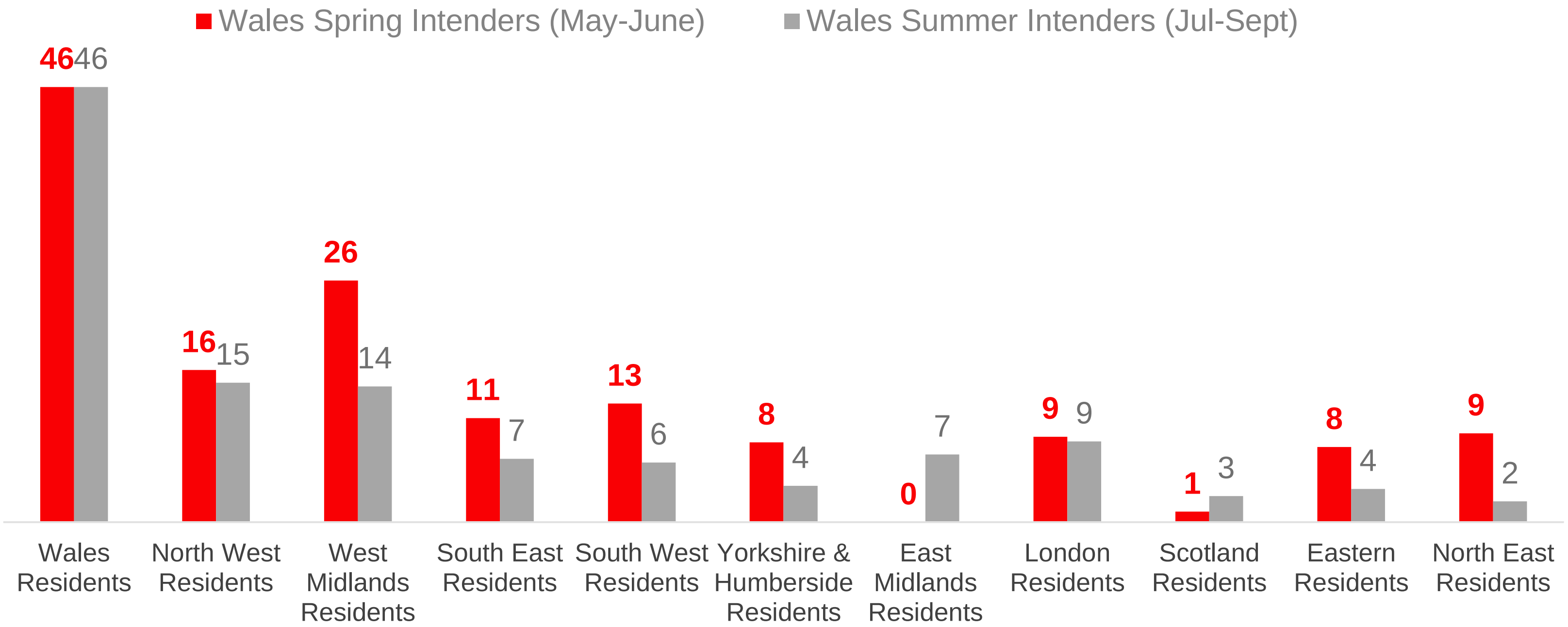
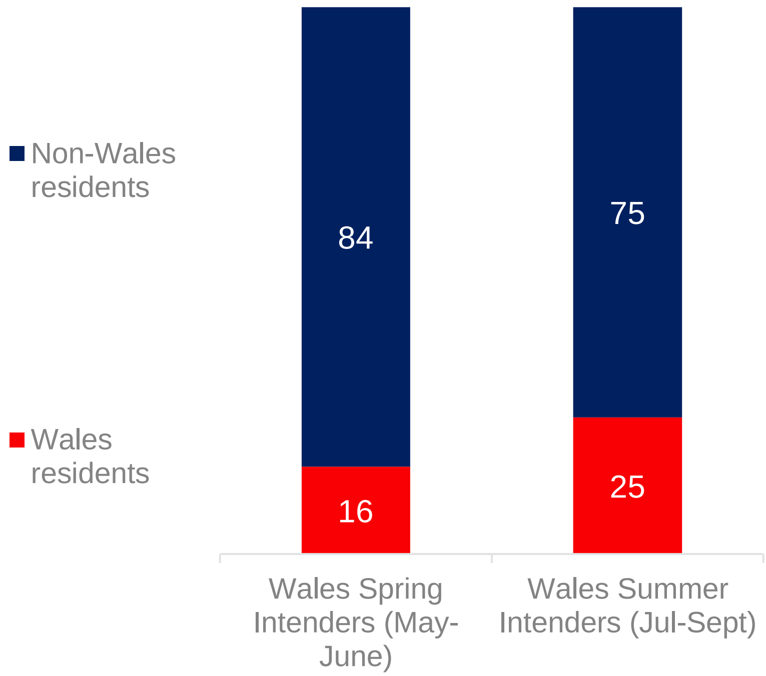


Figure 30. Breakdown of Wales intenders by region of residence, Percentage, Waves 28-30, U.K.



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=64/170, East of England n=44*/90; East Mids n=44*/94; North East n=17**/50; North West n=62/118; South East n=90/167; South West n=57/78; West Mids n=46/130; Yorkshire and The Humber n=47/92;London n=62/153; Scotland n=98/192

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 and than U.K. intenders on the whole.
- Notably, retirees index higher amongst spring intenders than the general public - albeit only marginally.
- 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 31. Breakdown of populations and intenders by life stage, Percentage Waves 28-30, U.K.

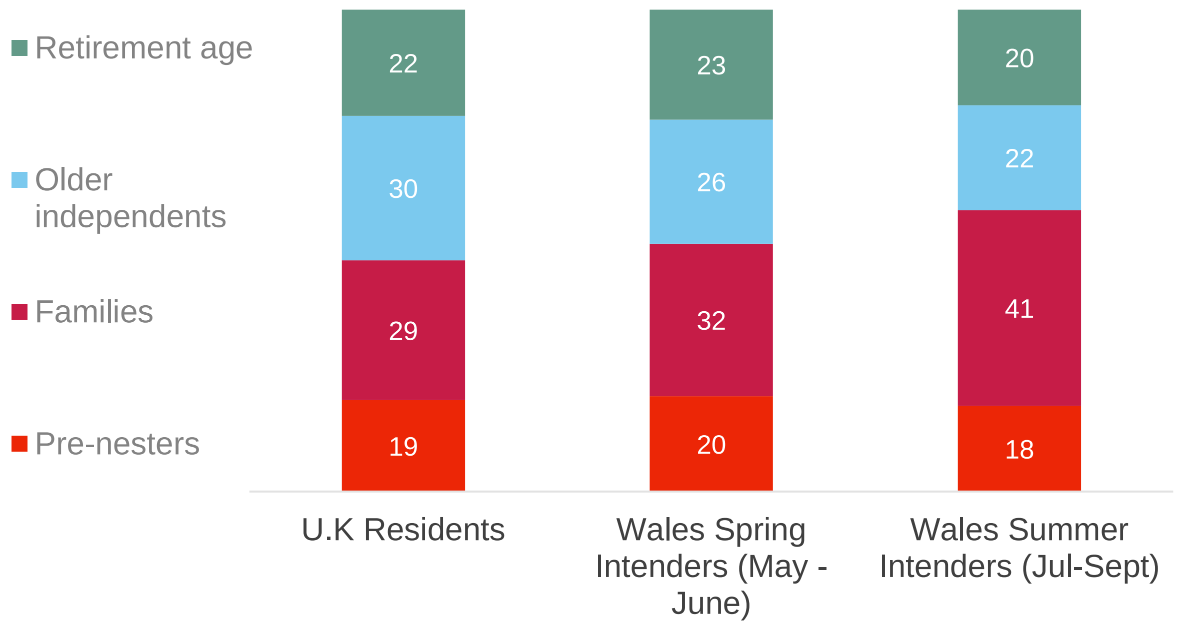


Figure 32. Breakdown of populations and intenders by social grade, Percentage Waves 28-30, U.K.

Source: Demographics. Base: All respondents. U.K. population n=3,174; Wales inclusive Spring Intenders n=93; Wales inclusive Summer Intenders n=215

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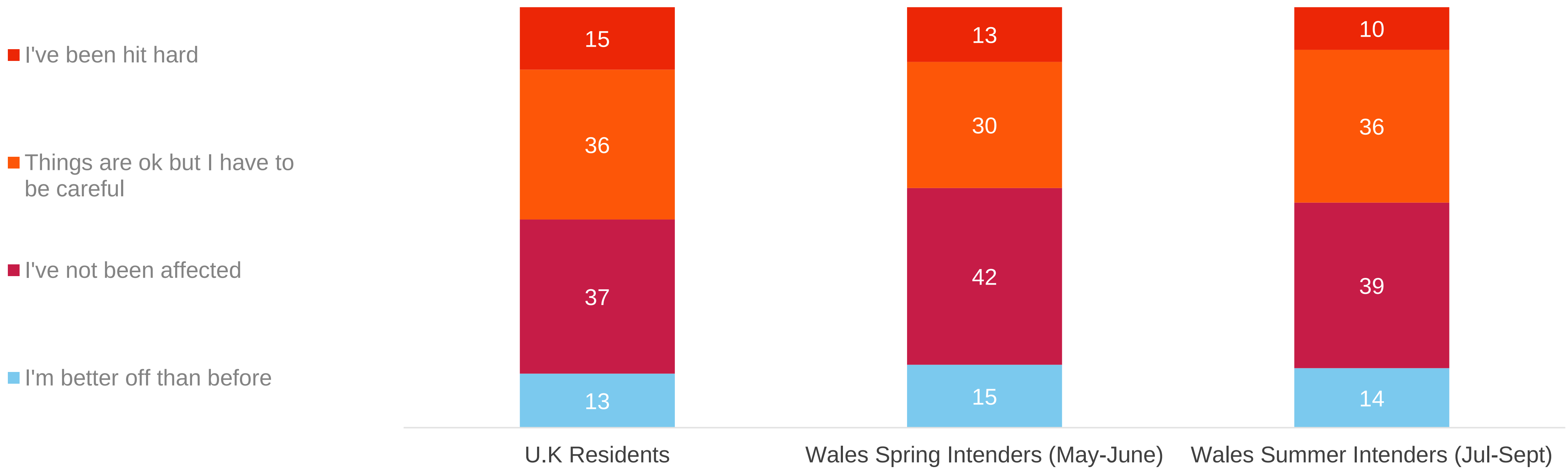
Financial segments and financial impact of COVID-19 on intenders

- Wales intenders tend to be marginally less impacted financially by COVID-19 than the general population, over half either ‘better off than before’ or ‘not been affected’. That said, more than 2 in 5 spring and summer *have* been impacted financially by COVID-19, suggesting finances may be a concern on their trip.

Figure 33. Breakdown of intenders by financial segments, Percentage, Waves 28-30, U.K.



Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Base: All respondents. U.K. population n=3,174; Wales inclusive Spring Intenders n=93; Wales inclusive Summer Intenders n=215.

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BVA BDRC

Spring/summer intenders overnight trip behaviour

To ensure robust sample sizes, in this chapter spring and summer trips are merged together. Wales overnight trip intentions are charted alongside overall U.K. trip intentions for comparison

Trip purpose and trip length of Spring/Summer trips

- Consistent with previous reporting, the vast majority of overnight trips to Wales between May and September are likely to be for a ‘holiday’ purpose, higher than amongst all U.K. trips where ‘visits to friends or relatives’ are more prevalent.
- Longer trips of 4+ nights are slightly more dominant than shorter breaks amongst both Wales and U.K. intenders (particularly in the summer months), although the balance is relatively even.

Figure 34. Purpose of next spring/summer trip, Percentage, Waves 28-30, U.K.

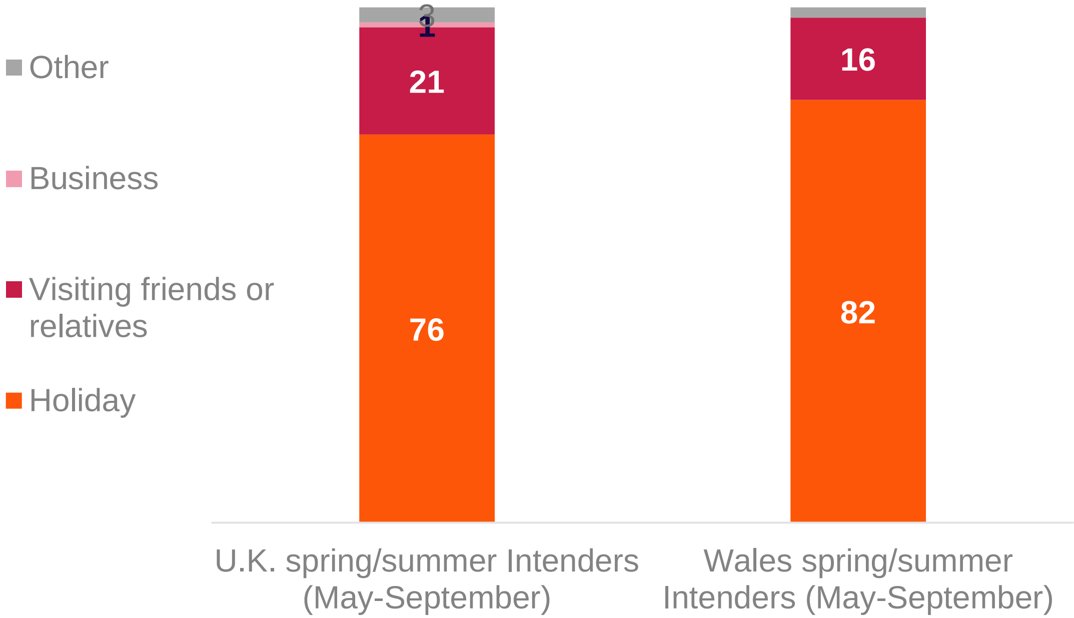
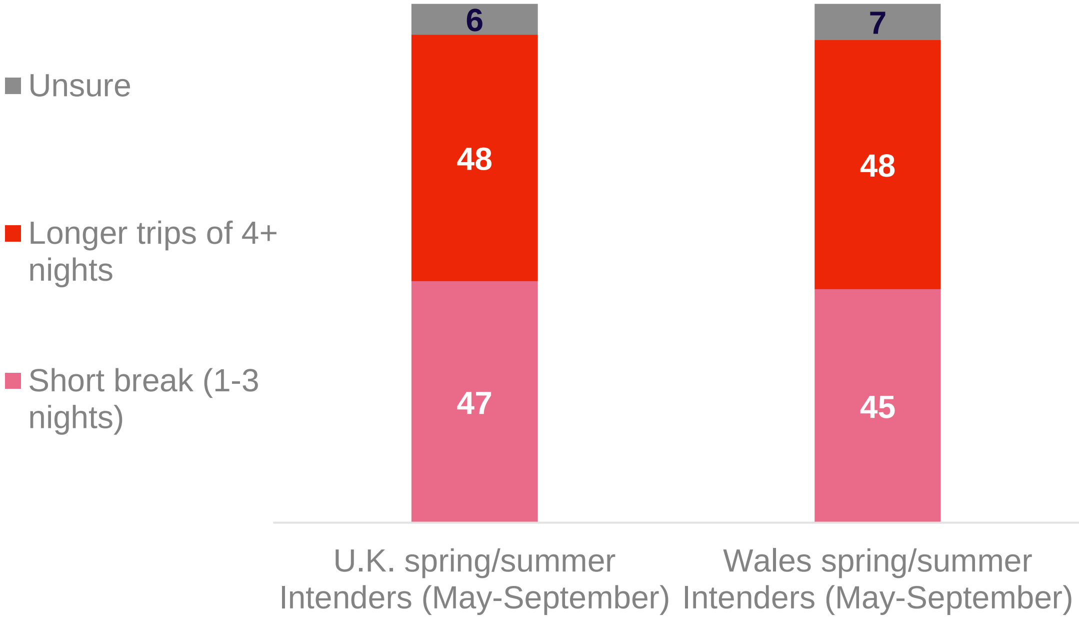


Figure 35. Length of next spring/summer trip, Percentage, Waves 28-30, U.K.



VB6f. And which of the following best describes the purpose of this trip? VB3. Is this next trip likely to be a short break or longer trip of 4+ nights? Base: All respondents planning on taking a domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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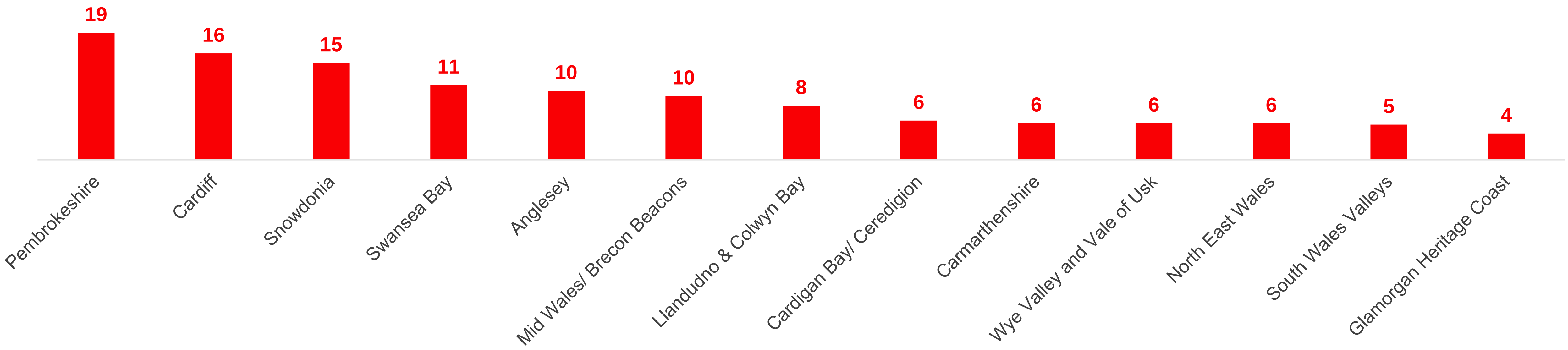
Where planning on staying on Wales trip in spring and Summer

- Pembrokeshire is the number one destination for an overnight trip in Wales between May and September, followed closely by Cardiff and Snowdonia.

Figure 36. Planned destination for next spring/summer Wales trip, Percentage Waves 28-30, 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 domestic holiday or short break in spring or summer n=245

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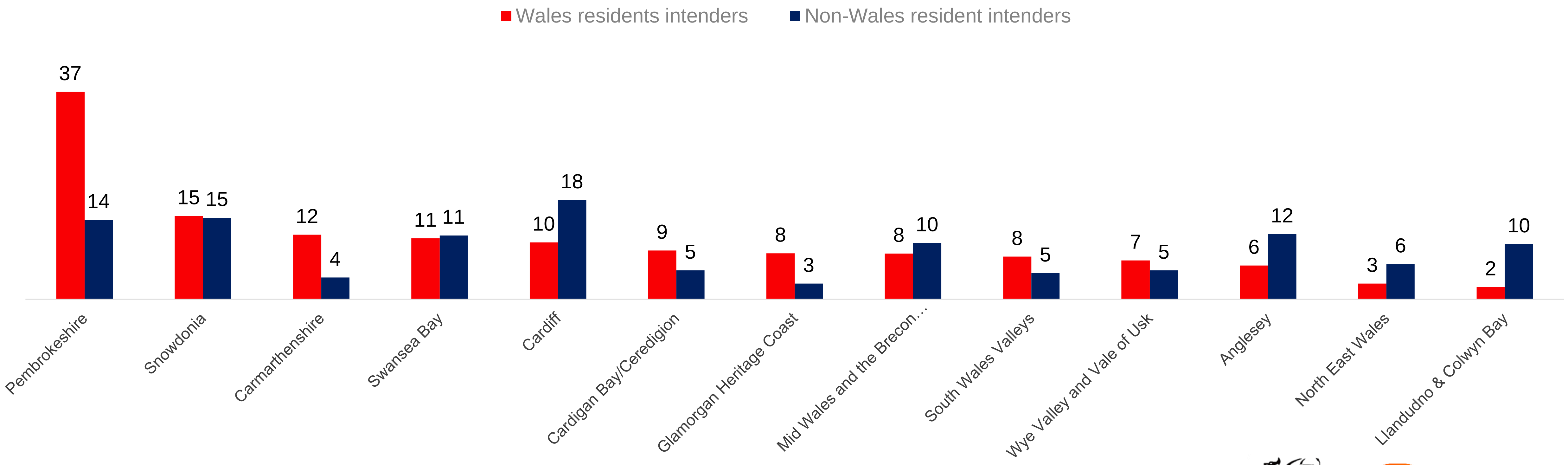
Where planning on staying on Wales trip in spring and Summer

- When looking at Wales destination intention by region of residence, Pembrokeshire is by far the most preferred destination for Wales-based adults this spring/summer, more than twice as many intenders than Snowdonia.
- Non-Wales residents have a wider spread of intended destinations – for this audience, Cardiff is the single most preferred at 18%, followed by Snowdonia at 15% and Anglesey at 12%.

Figure 37. Planned destination for next Wales trip for <u>Spring and Summer Intenders</u> by residence, Percentage Waves 28-30, U.K. and Wales

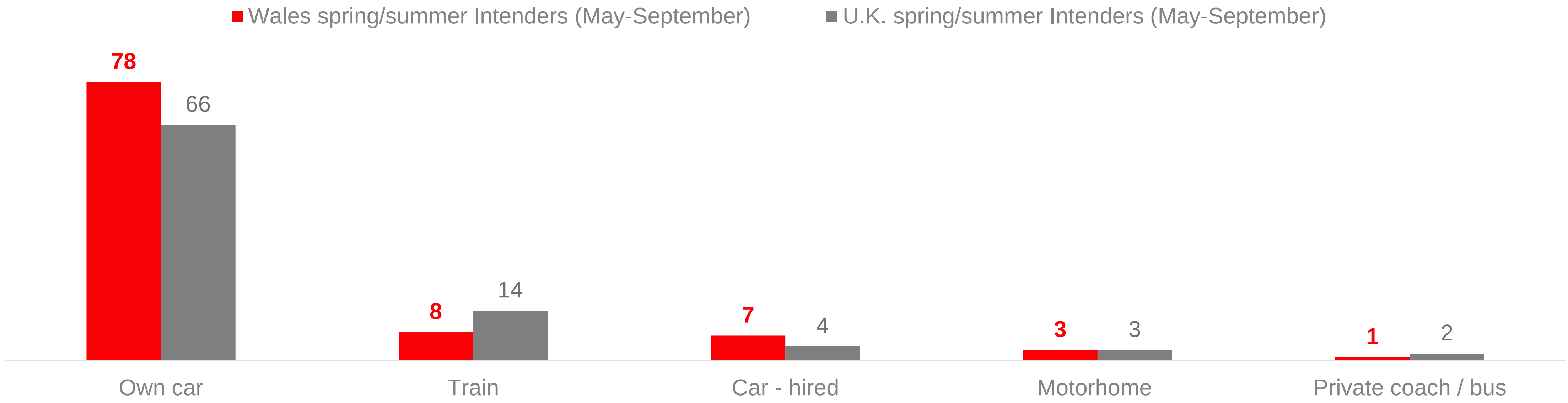


QVB4b. Where in Wales do you expect to be staying on this next holiday or short break?8
Base: All respondents planning on taking a domestic holiday or short break in spring or summer March to September. All Wales resident intenders n=106; Non-Wales resident intenders n=139

Main mode of transport for next short break or holiday

- Amongst both U.K. and Wales intenders, 'own car' is by far the leading mode of transport intended to be used, although this is significantly more likely to be the case for trips to Wales.
- Train is the second most preferred mode of transport, although more so for U.K. trips where city destinations are more popular.

Figure 38. Top 5 main modes of travel of destination for spring/summer intenders, Percentage Waves 28-30, U.K.

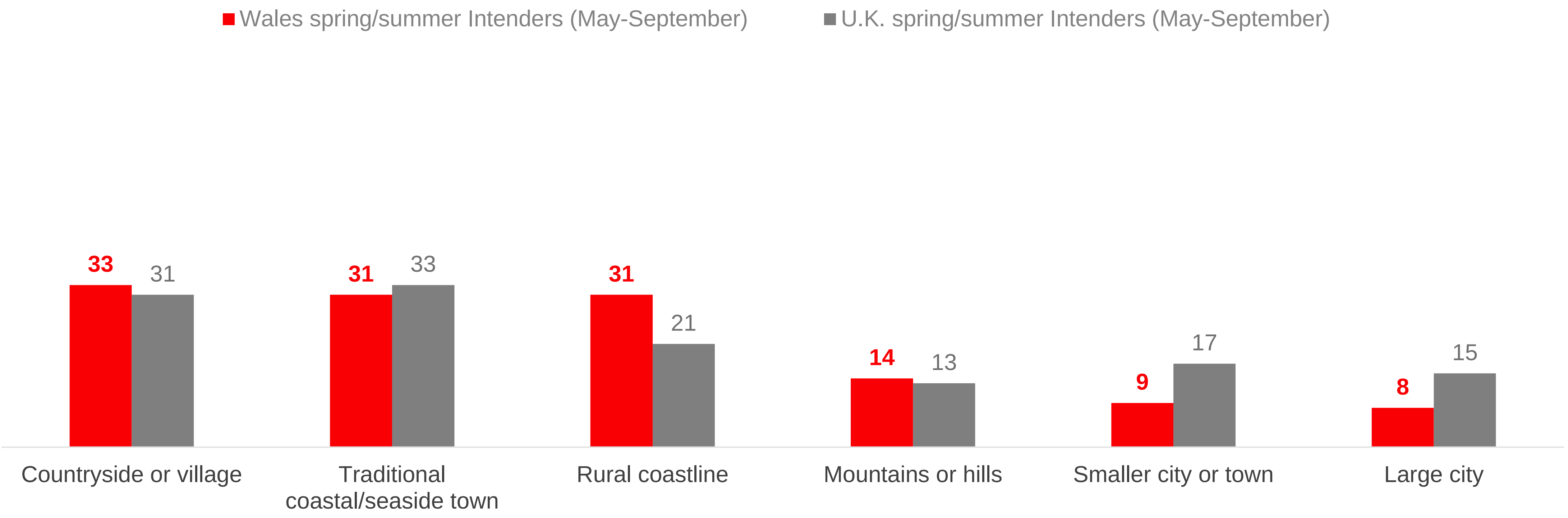


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All respondents planning on taking a domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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

- ‘Countryside or village’, ‘traditional coastal/seaside town’ and ‘rural coastline’ are the three preferred destination types for Wales spring/summer intenders this year.
- U.K. intenders share a similar preference of destination type, although are significantly less likely to be intending to visit the rural coastline and significantly more likely to be intending to visit a city or town.

Figure 39. Main type of destination for spring/summer intenders, Percentage Waves 28-30, 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 domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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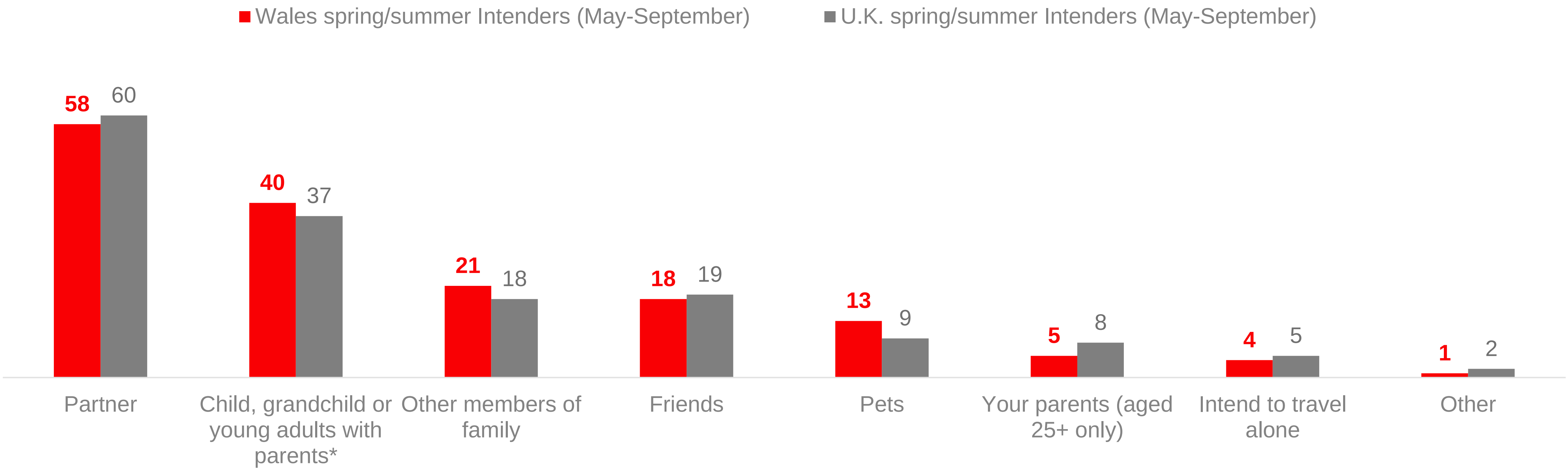
Make-up of visitor party for next Wales holiday or short break

- Wales and U.K. intenders are likely to attract similar party compositions on overnight trips this spring/summer – travelling with ‘partner’ making up around 3 in 5, followed by travelling with ‘children’ (2 in 5). Unsurprisingly, parties with children have a stronger prevalence in the summer months.
- ‘Other members of family’ and ‘friends’ each make up around 1 in 5 of visitor parties.
- Travelling with pets is more likely for trips being taken in Wales.

Figure 40. Visitor party make-up for spring/summer intenders, Percentage Waves 28-30, U.K.



QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents planning on taking a domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173 *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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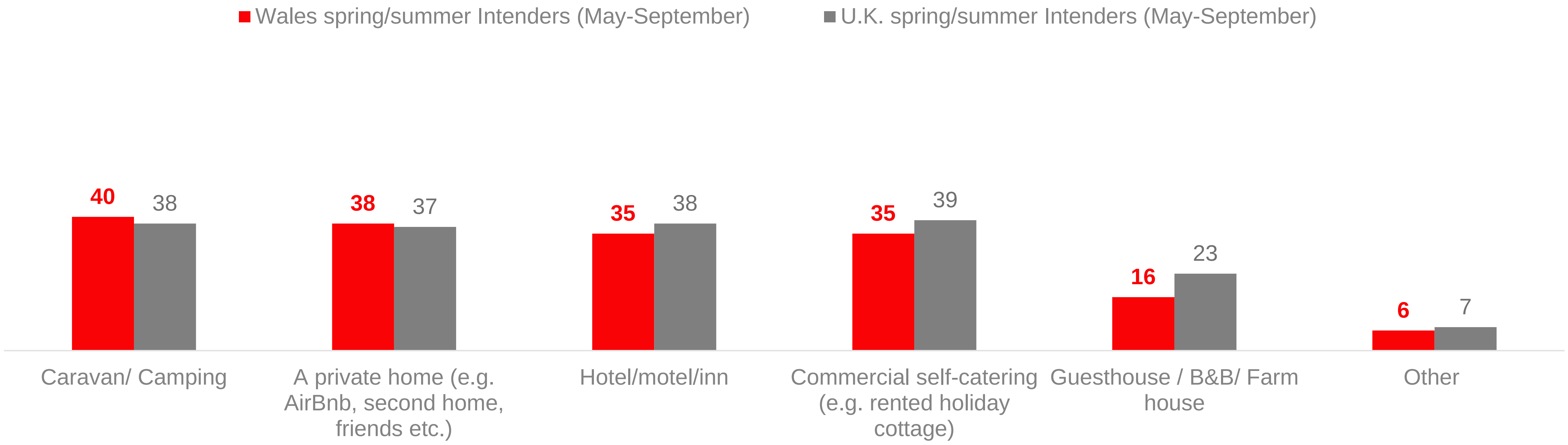
Type of accommodation for next Wales short break or holiday

- A range of accommodation types are being considered by Wales and U.K. spring/summer trip intenders – minimal separation between stays in caravan/camping, a private home, a hotel/motel/inn and commercial self-catering.
- On average, intenders are considering almost 2 accommodation types, perhaps reflecting continued uncertainty around availability and government restrictions.

Figure 41. Accommodation planning on staying in on next U.K. overnight trip for spring/summer intenders, Net percentage Waves 28-30, 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 domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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Type of accommodation for next Wales short break or holiday

- ‘Static caravan’ is the leading choice amongst Wales and U.K. intenders planning a stay in ‘camping/caravan’ accommodation this spring/summer.
- ‘Friend or relative’s home’ is the most popular private home choice

Figure 42. Type of camping/caravanning accommodation planning on staying in on next overnight trip for spring/summer intenders, Net percentage Waves 28-30, U.K.

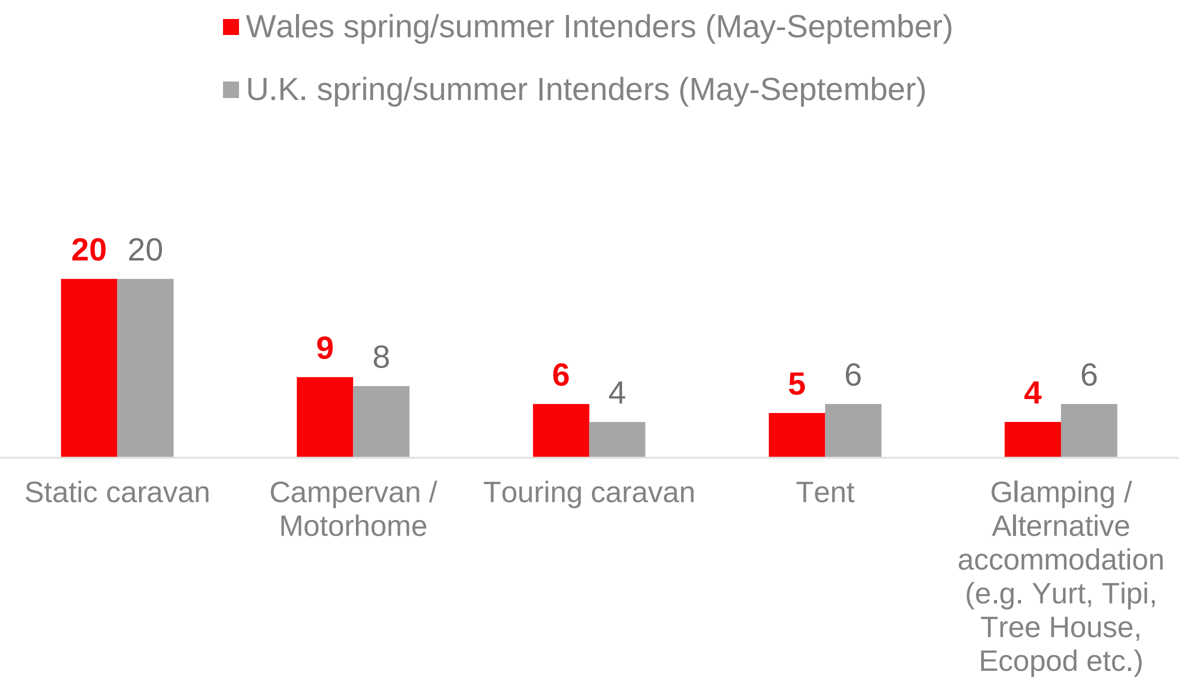
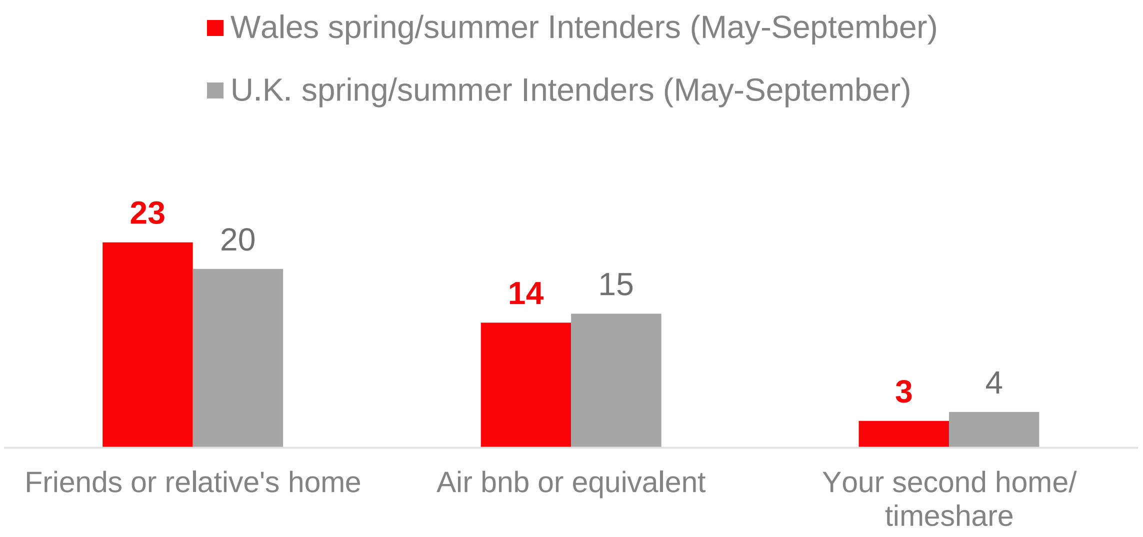


Figure 43. Type of private home accommodation planning on staying in on next overnight trip for spring/summer intenders, Net percentage Waves 28-30, U.K.



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 domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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Anticipated spend on next Wales holiday or short break

- On average, Wales spring/summer intenders expect to spend over £100 less on their overnight spring/summer trip than U.K. intenders (£712 compared to £816). This is despite Wales attracting a higher proportion of the higher spending family life stage.

Figure 44. Anticipated spend for spring/summer intenders, Percentage Waves 28-30, U.K.

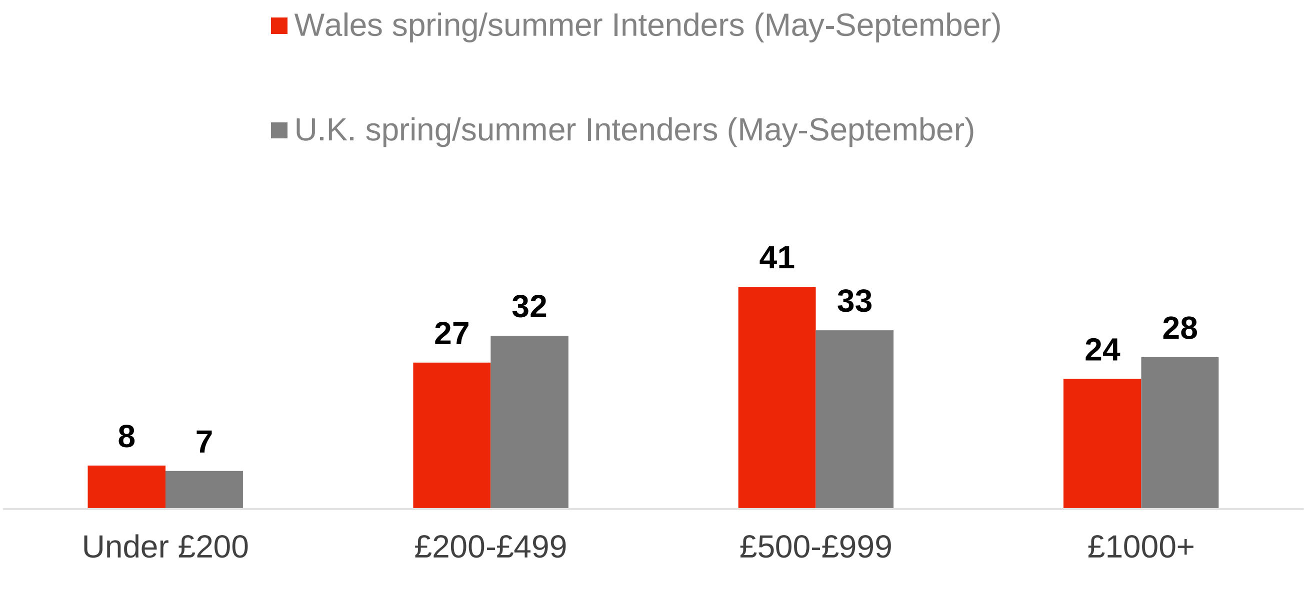
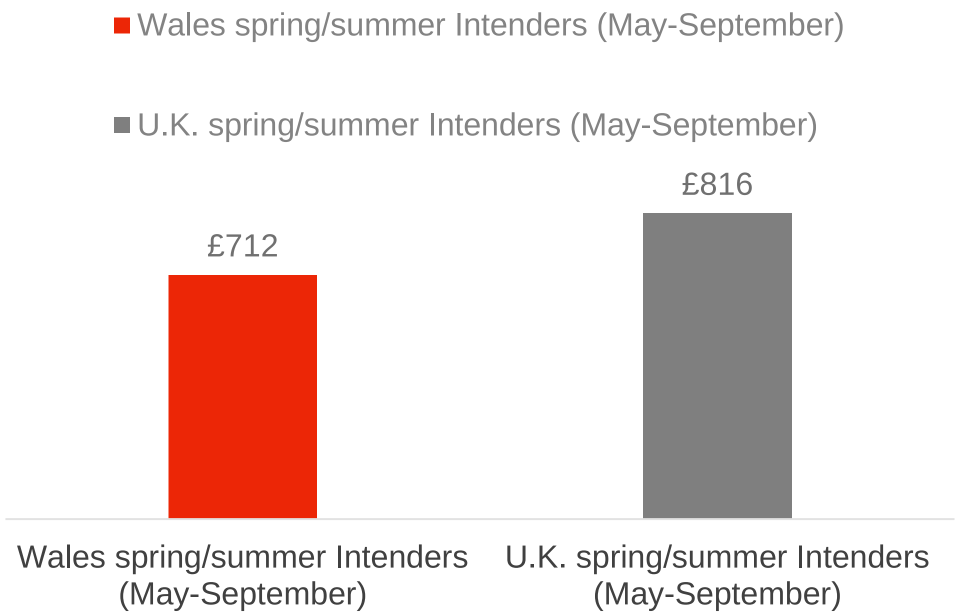


Figure 45. Anticipated average spend for spring/summer intenders, Average, Waves 28-30, U.K.

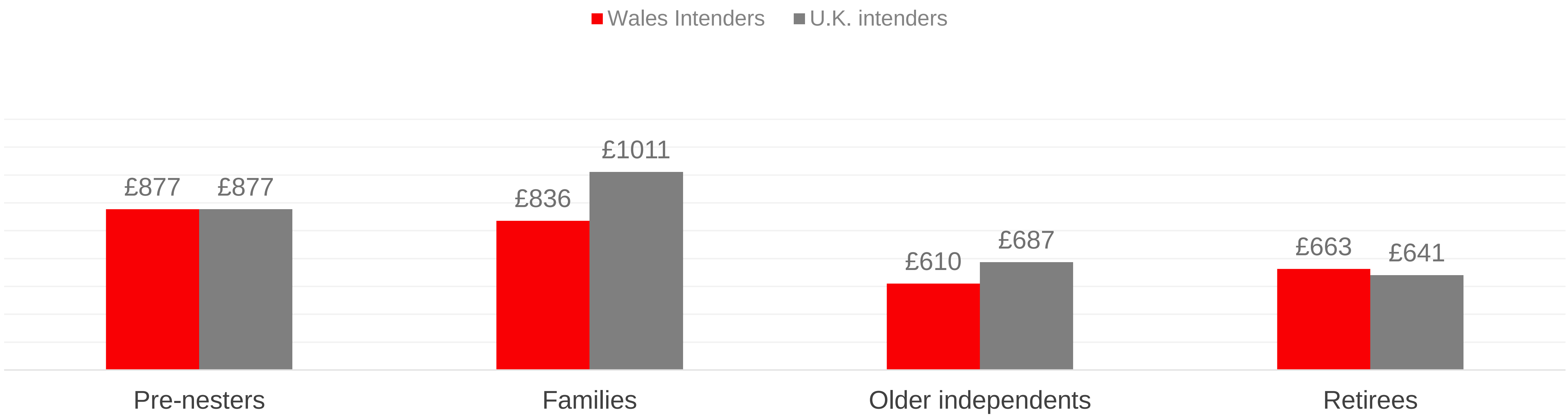


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a domestic holiday or short break in spring or summer. Wales Exclusive Spring or Summer Intenders n=166; U.K. spring or summer intenders n=1907

Anticipated spend on next Wales holiday or short break

- At a U.K. intender level, families are by far the highest spending life stage for spring/summer overnight trips. Retirees and older independents are the lowest, likely driven by smaller visitor parties than other life stages.
- Whilst Wales intender families still spend more than older life stages, their average spend is almost £200 less than U.K. intender families, suggesting the Wales family visitor is more likely to be looking for a 'good value' trip.
- This explains why, despite making up a higher proportion of families than U.K. trips on the whole, the average spend for a Wales overnight trip is lower.

Figure 46. Anticipated average spend for spring/summer intenders, Average, Waves 28-30, U.K.

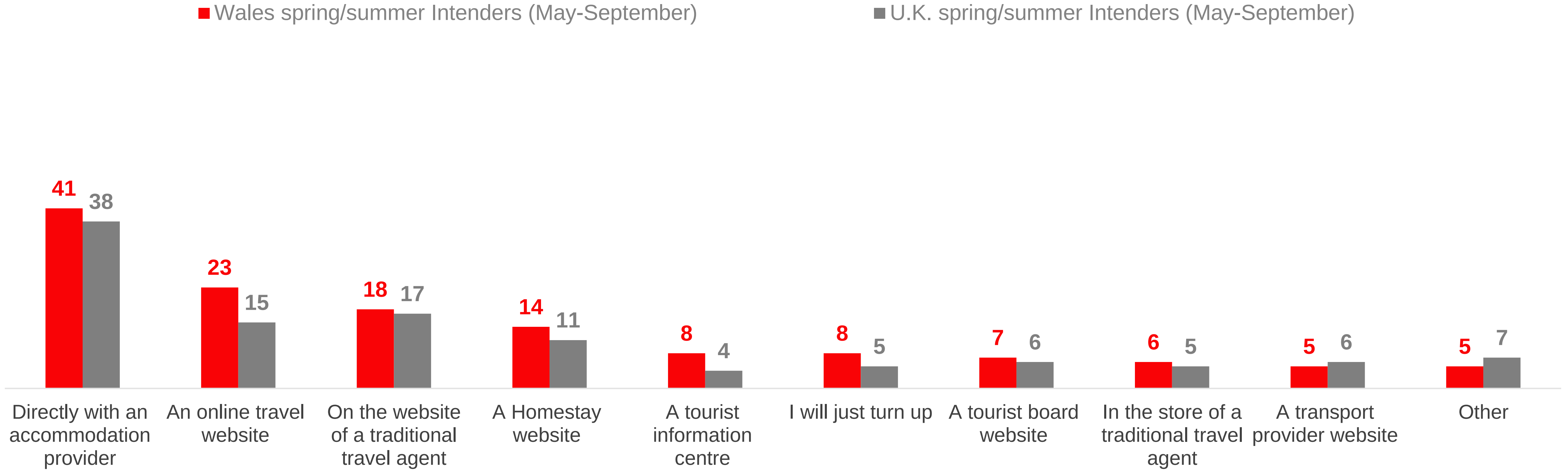


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a domestic holiday or short break in spring or summer. UK intenders/Wales intenders. Pre-nesters n=48/428; Families n=103/683; Older independents n=45/467; Retirees n=38/329

Preferred booking channel for next Wales short break or holiday

- Both U.K. and Wales spring/summer intenders are most likely to book directly with the accommodation provider.
- An online travel agent, the website of a traditional travel agent and a homestay website make up other leading booking channels.

Figure 47. Accommodation booking channel for spring/summer intenders, Net percentage Waves 28-30, 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 domestic holiday or short break in spring or summer. U.K. spring or summer intenders n=2,005; Wales Exclusive Spring or Summer Intenders n=173

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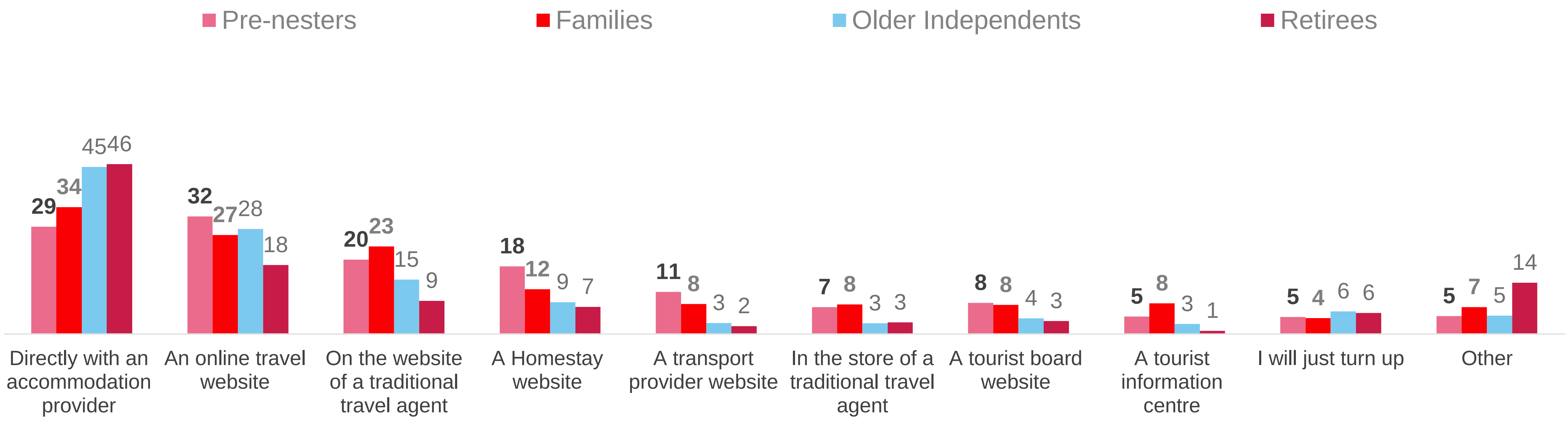
Preferred booking channel for all UK intenders by life stage

- Booking preference varies considerably by life stage – retirees are the most likely to prefer direct bookings, and the least likely to choose online options.
- Pre-nesters, in contrast, index highest for online travel agents and homestay websites. These findings are consistent with previous reporting periods.

Figure 48. Accommodation booking channel for all UK Spring or Summer intenders by life stage, Net percentage Waves 28-30, 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=464; Families n=725; Older Independents n=479; Retirees n=337;

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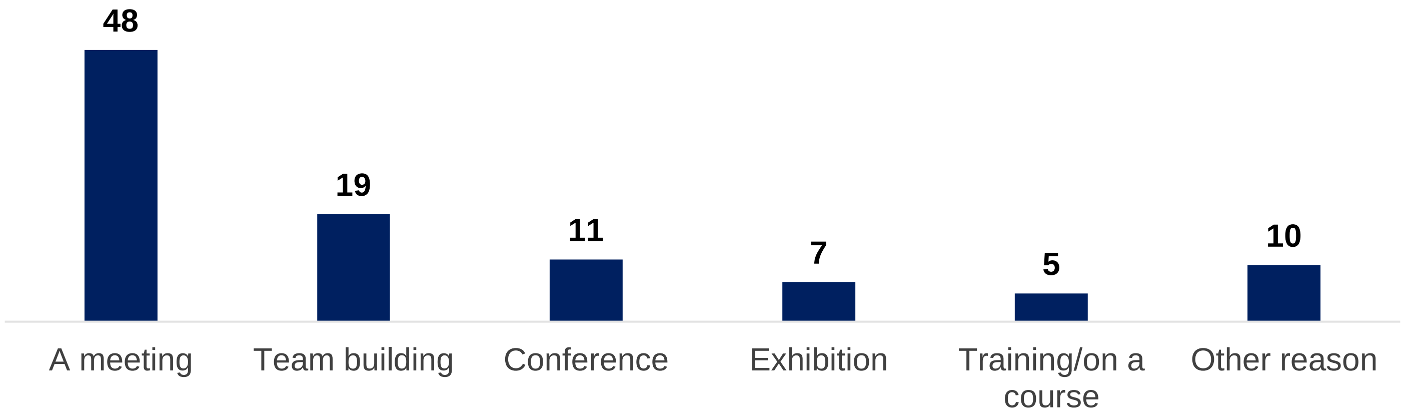
Travelling for business

Intention to take an overnight business trip by June 2021

- Only 10% of U.K. adults in employment intend to take an overnight business trip by June 2021, dropping slightly to 8% of Wales residents. A meeting is by far the most prevalent reason for an overnight trip – chosen by nearly half.

Figure 49. Proportion anticipating an overnight business trip by June 2021, Percentage, Waves 28 + 30, U.K.

Figure 50. Reasons for taking an overnight business trip , Percentage Waves 28 + 30, U.K. residents in employment



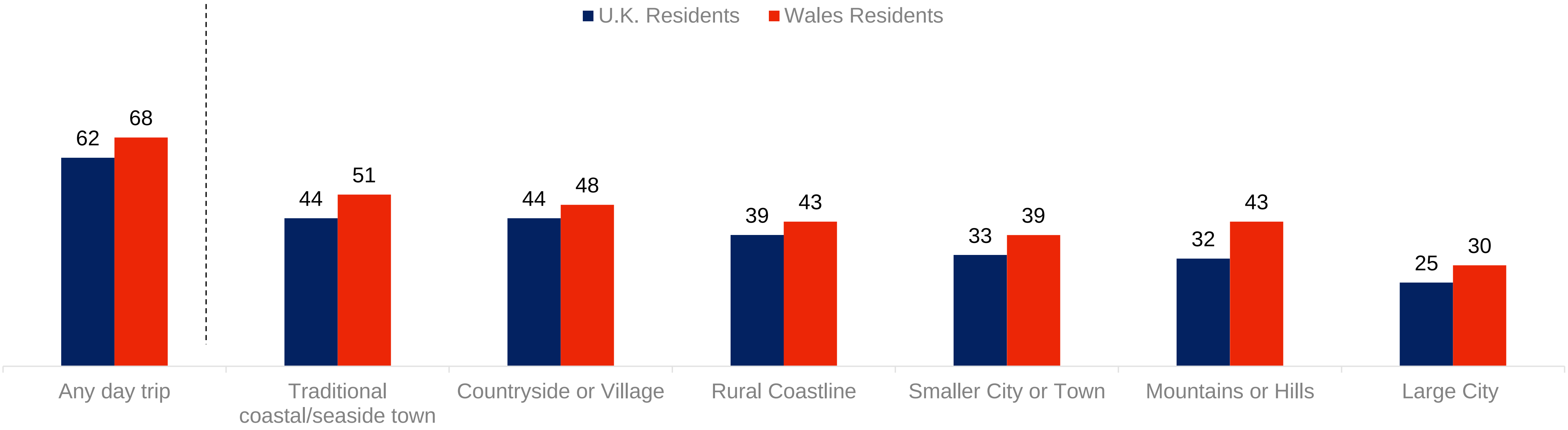
VB14a. Now looking ahead, are you intending to take any overnight business trips in the U.K. between now and June 2021? VB14b. What would be the main reason for this overnight business trip? Base: All in employment: U.K. residents in employment n=2629; Wales residents in employment n=297. U.K. residents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

Day trips and general leisure behaviour

Day trip intention by destination type

- As of early May 2021, over 3 in 5 (62%) U.K. residents and nearly 7 in 10 (68%) Wales residents plan on taking a day trip by this summer. Day trip intention is highest for less populated destination areas such as ‘traditional coastal/seaside town’ and ‘countryside or village’.
- Trip intentions are lower for urban areas such as ‘a large city’- although this will in part be driven by proximity of city destinations, it also reflects low comfort levels for visiting this type of a destination.

Figure 51. Likelihood to take a day trip overall and by destination type by this summer, percentage, Waves 28-30, UK

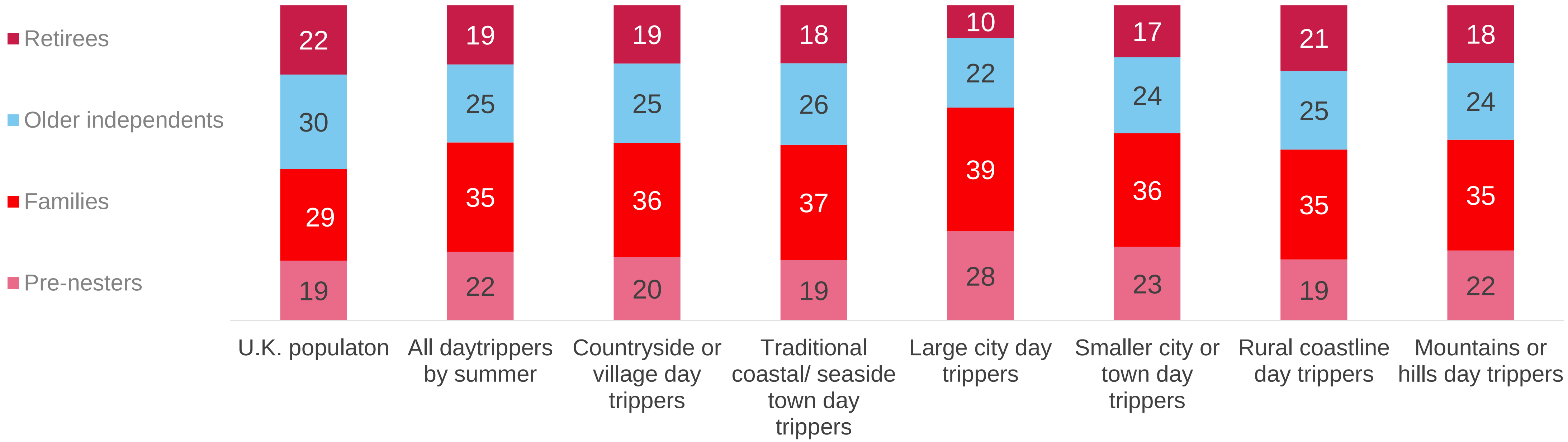


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 30 respondents n = 1,758

Day trip intention by destination type and life stage

- Overall, day trippers have higher representation amongst pre-nesters and families compared to the wider U.K. population.
- The breakdown of life stage differs by day trip destination, with younger groups exhibiting a preference for visiting a large city, and to a lesser extent for 'smaller city or towns'.
- Families show interest in taking day trips to both urban and rural locations.

Figure 52. Breakdown of day trip intenders* by life stage, percentage, Waves 28-30, UK



QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 30 respondents n = 1,758

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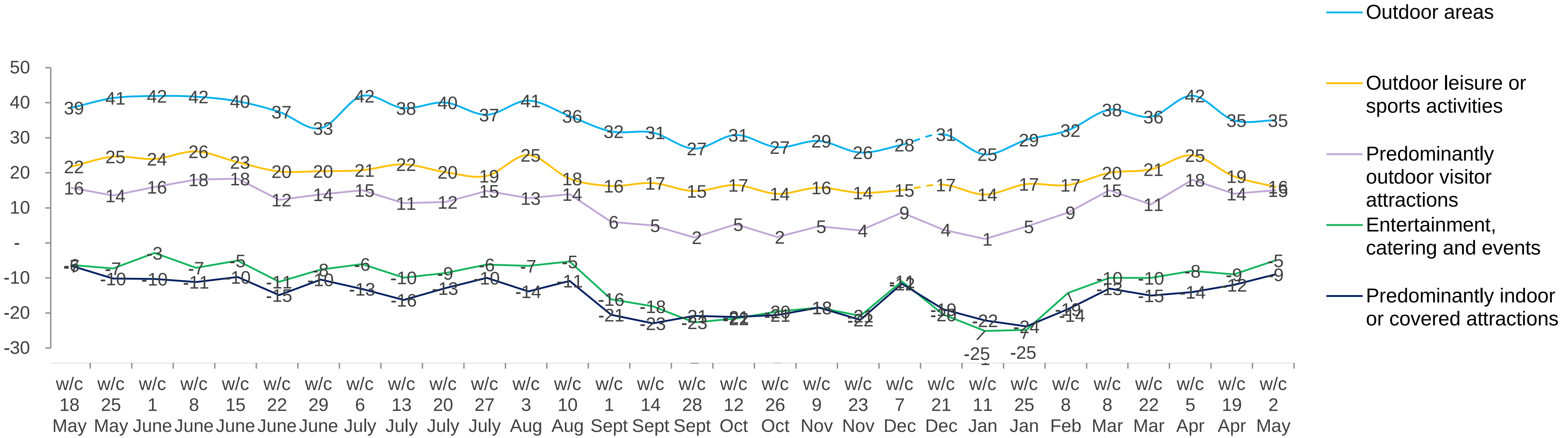
Trended anticipated activity compared to 'normal' in the next few months

- The order of anticipated general leisure activity compared to normal has remained largely consistent since the start of the pandemic.
- Intentions remain stronger for outdoor based attractions and activities.
- However, in recent waves there appears to be some convergence between 'outdoor' and 'indoor' engagement – both slowly approach normality.

Figure 53. Leisure venues and activities more or less likely to visit/do in the next few months, Net: 'more likely' minus 'less likely' Waves 1-30, UK

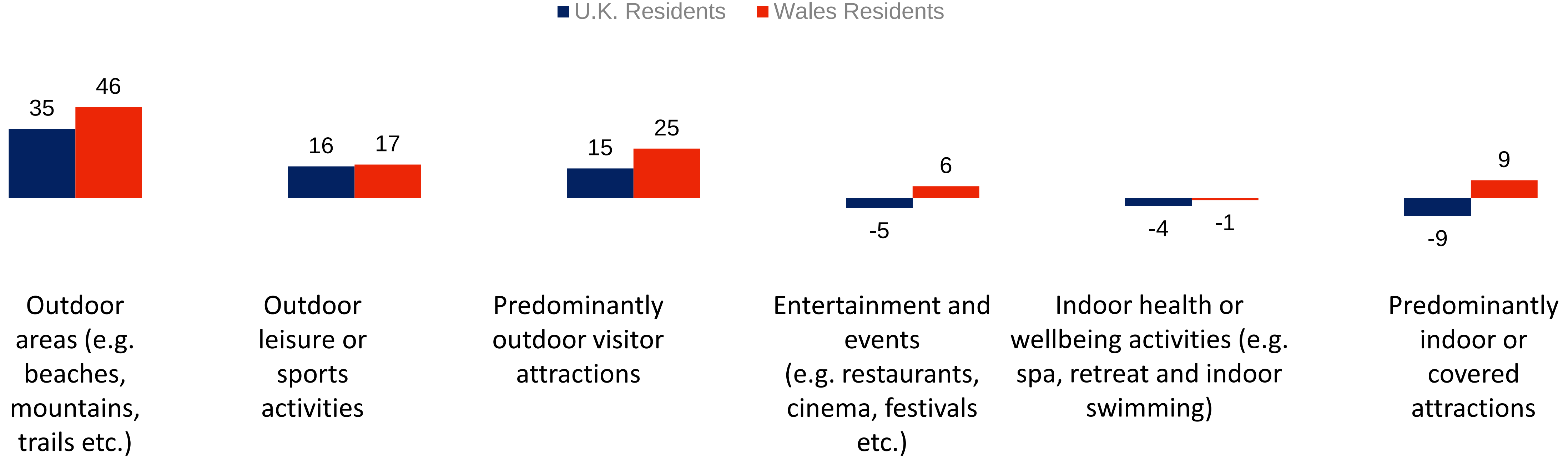


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=c.1,750.

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

- As of early May 2021, both U.K. and Wales adults anticipate engaging significantly more than normal with 'outdoor areas', 'outdoor leisure or sports activities' and 'outdoor visitor attractions' – engagement with the latter increasing significantly since the previous reporting period in mid-February.
- Wales adults are also more likely than normal to be planning to visit 'entertainment and events' and 'indoor attractions', compared to normal.

Figure 54. Leisure venues and activities more or less likely to visit/do in the next few months, Net: 'more likely' minus 'less likely' Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

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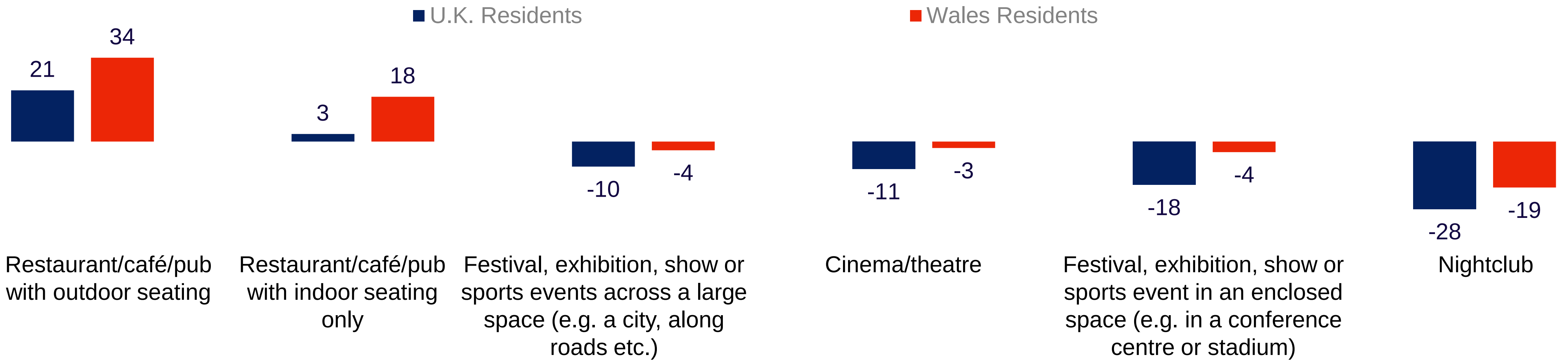
Anticipated activity compared to 'normal' in the next few months

- Both U.K. and Wales adults anticipate visiting restaurants with outdoor seating significantly more than normal in the next few months.
- Unlike in previous reporting periods, they also anticipate visiting more *indoor* restaurants than normal – marginally so for U.K. residents and significantly so for Wales residents.
- Other entertainment and events activities – including visiting festivals, cinemas/theatres and nightclubs are likely to continue to generate fewer visits, although this is less the case than in previous reports or amongst Wales residents.

Figure 55. Entertainment and events venues and activities more or less likely to visit/do in the next few months, Net: 'more likely' minus 'less likely' Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

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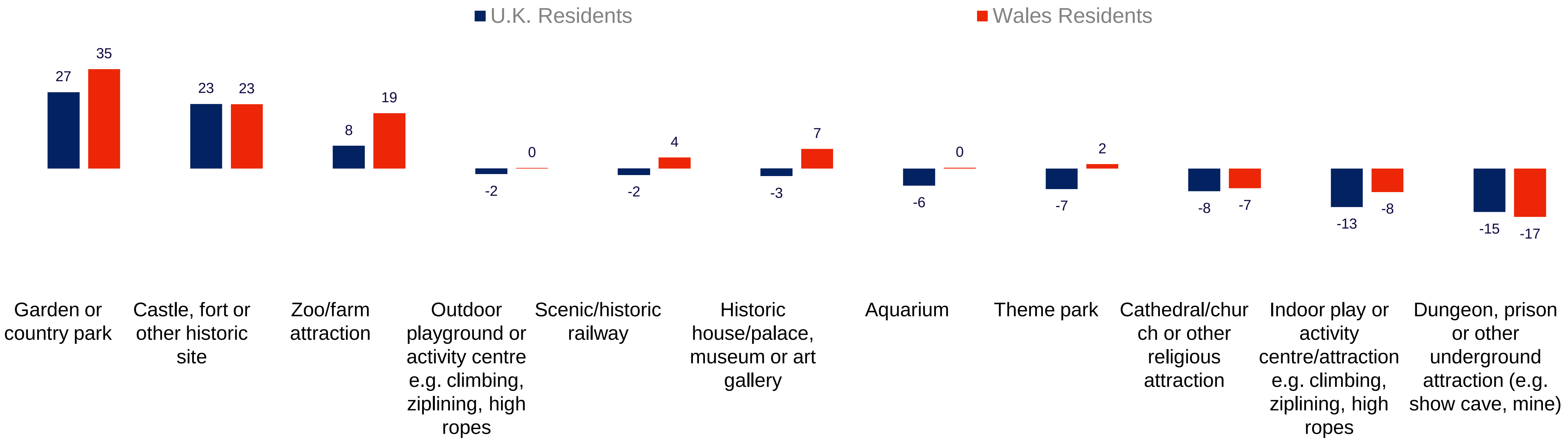
Anticipated activity compared to 'normal' in the next few months

- In the last 12 months, 'garden or country park' has consistently been the only visitor attraction type set to experience a large net increase visit intentions. Positively, as of early May 2021 this attraction type is joined by 'castles, forts or other historic sites' and 'zoos/farm attractions' in generating net positive visit intentions.
- Amongst Wales residents, there is also set to be positive engagement with some indoor attractions including 'historic houses/palaces', 'scenic railways' and 'theme parks' . Only three attraction types are set to generate net fewer visits than normal amongst Wales residents, and this is significantly less the case than at the start of 2021.

Figure 56. Visitor attractions more or less likely to visit compared to normal in the next few months, Net: 'more likely' minus 'less likely' Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

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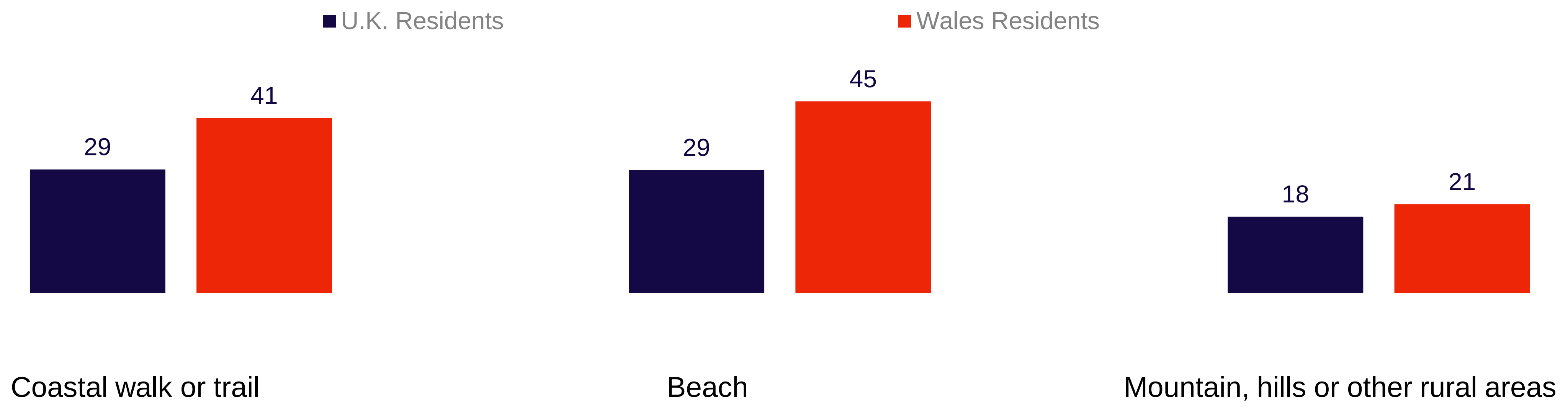
Anticipated activity compared to ‘normal’ in the next few months

- UK and Wales adults continue to be significantly more likely to visit outdoor areas such as beaches, mountains or hills/rural areas, and coastal walks/trails – each significantly more so amongst Wales residents.

Figure 57. Outdoor areas more or less likely to visit in the next few months, Net: ‘more likely’ minus ‘less likely’ Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

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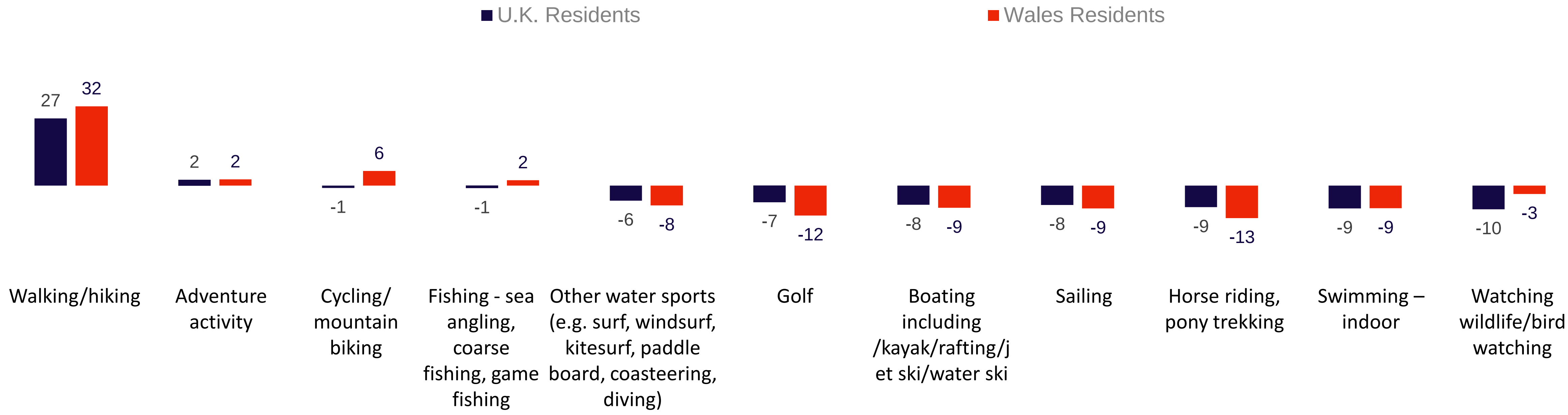
Anticipated activity compared to ‘normal’ in the next few months

- Consistent with previous reporting periods, both Wales and U.K. residents anticipate a large net increase in likelihood to go walking/hiking over the next few months. There is also a small anticipated increase in adventure activity and cycling/mountain biking by Welsh residents.
- There is likely to be a net decrease in most other outdoor activities, relatively consistent with previous reporting

Figure 58. Outdoor activities more or less likely to visit in the next few months, Net: ‘more likely’ minus ‘less likely’ Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

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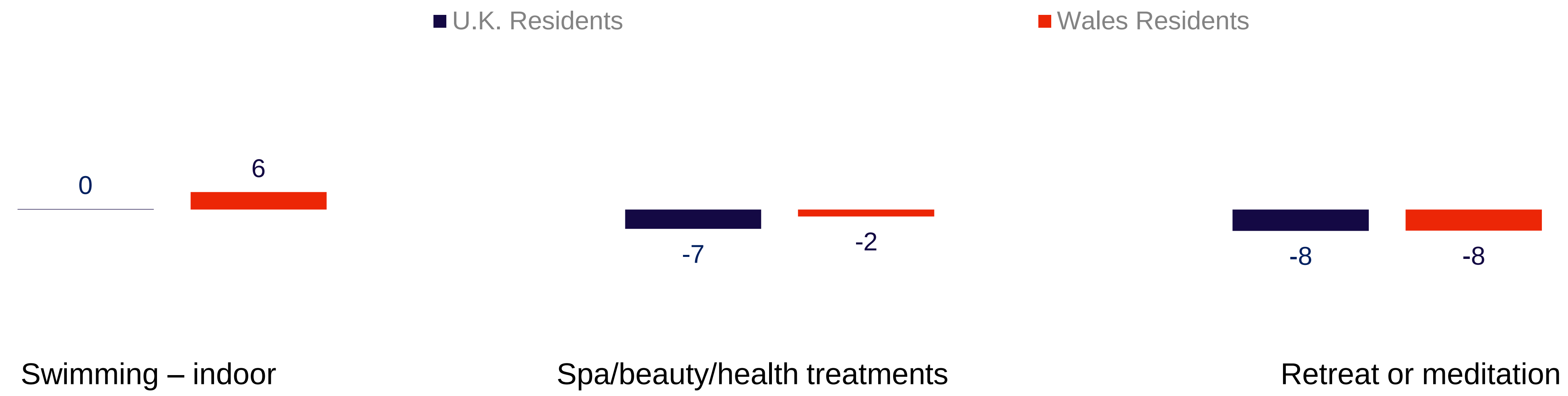
Anticipated activity compared to 'normal' in the next few months

- Anticipated engagement with indoor swimming is now consistent with normal behaviour amongst U.K. residents and above normal behaviour amongst Wales residents.
- Both U.K. and Wales adults anticipate lower engagement with 'spa/beauty/health treatments' and 'retreats or meditation', although consistent with other activities, they are higher than in the previous reporting period.

Figure 59. Indoor health and wellness more or less likely to do compared to normal in the next few months, Net: 'more likely' minus 'less likely' Wave 30, 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 in the next few months? Base: All respondents. U.K. population n=1,758; Wales population n=207

Overnight trips taken since April 2021

Please note small base sizes for Wales trips taken. Data is indicative only.

Overnight trips taken and purpose of trips since April 2021

- 1 in 7 U.K. and Wales adults state they have taken an overnight holiday or short break since April.
- The vast majority (77%) of trips taken to Wales were for a ‘holiday’ purpose, in contrast to all U.K. trips which were relatively evenly divided between holidays (46%) and visits to friends or relatives (43%).

Figure 60. Taken an overnight holiday or short break in the U.K. since April, Percentage Wave 30, U.K.

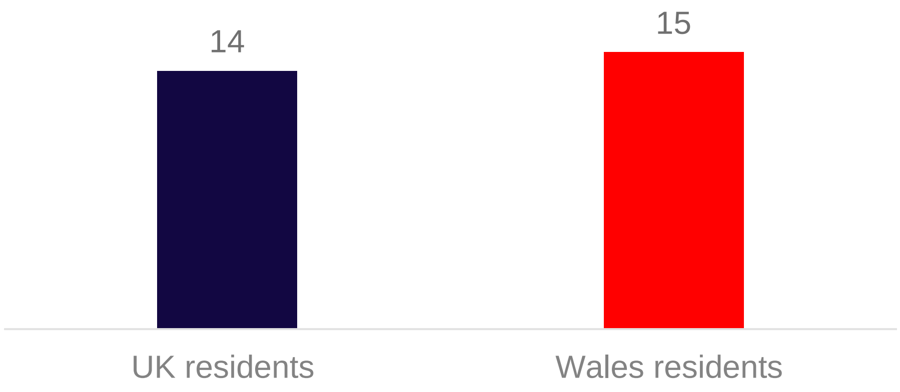
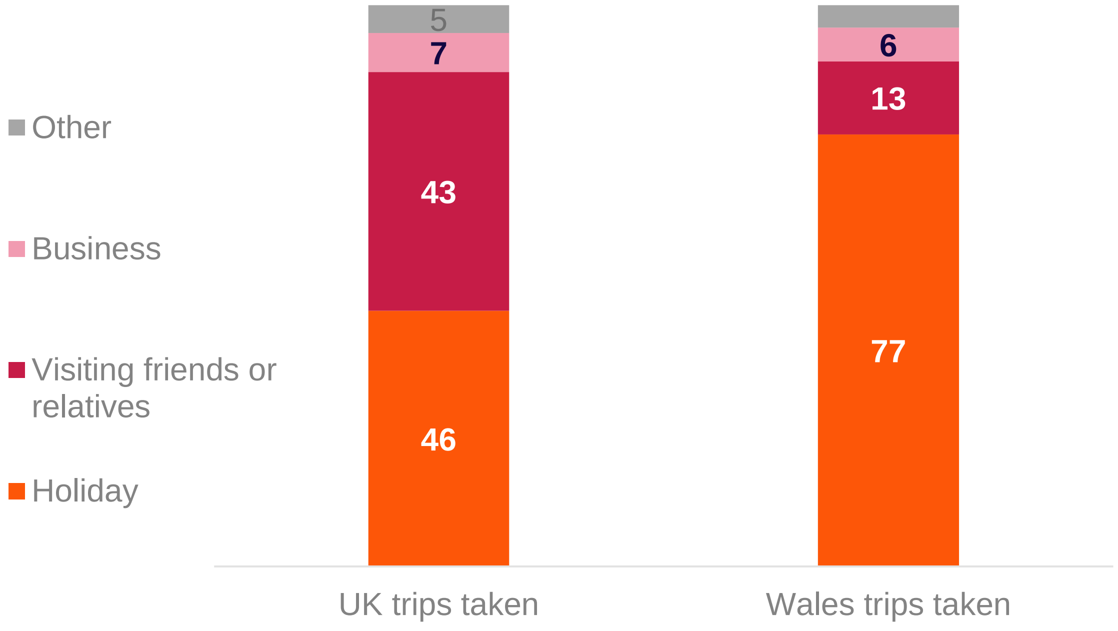


Figure 61. Purpose of intended and taken holiday or short break in UK and Wales, Percentage, Waves 29-30, U.K.



QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the trip you took in April?
Base: All Wave 30 respondents. U.K. residents n=1,758. Wales residents n=207.

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Demographics of overnight trip-takers since April

- Over half of U.K. and Wales trip-takers since April belonged to the family life stage (significantly higher than their representation in the population), 1 in 5 to the pre-nesters life stage (level with the populations). Only a small minority were retirees or older independents – both with lower representation than in the population.
- Compared to the wider population, social grade ABs were significantly more represented amongst U.K. and Wales trip-takers

Figure 62. Breakdown of population and trip-takers by life stage, Percentage Waves 29-30, U.K.

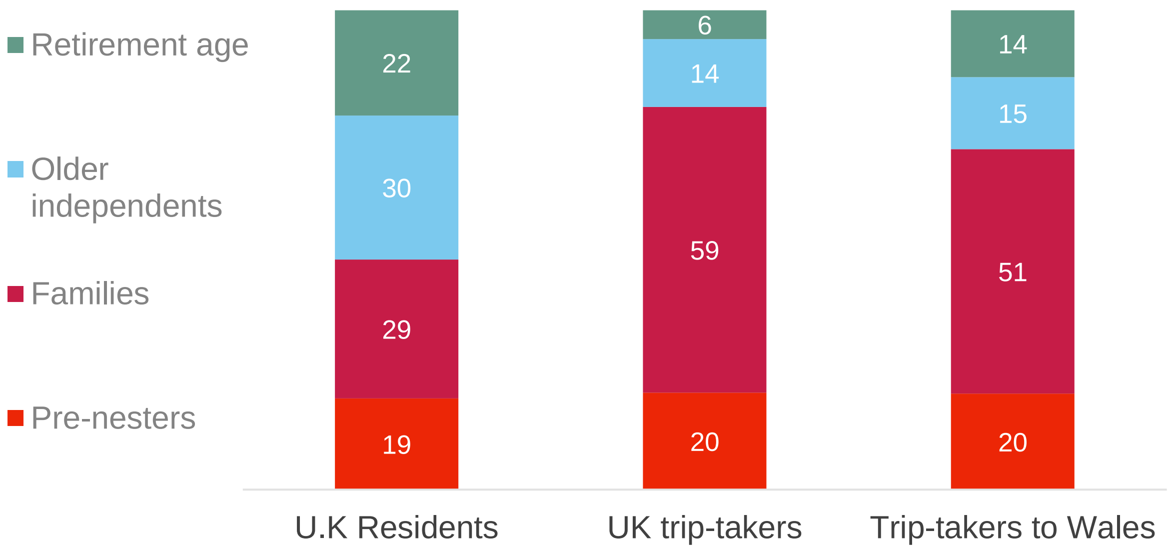
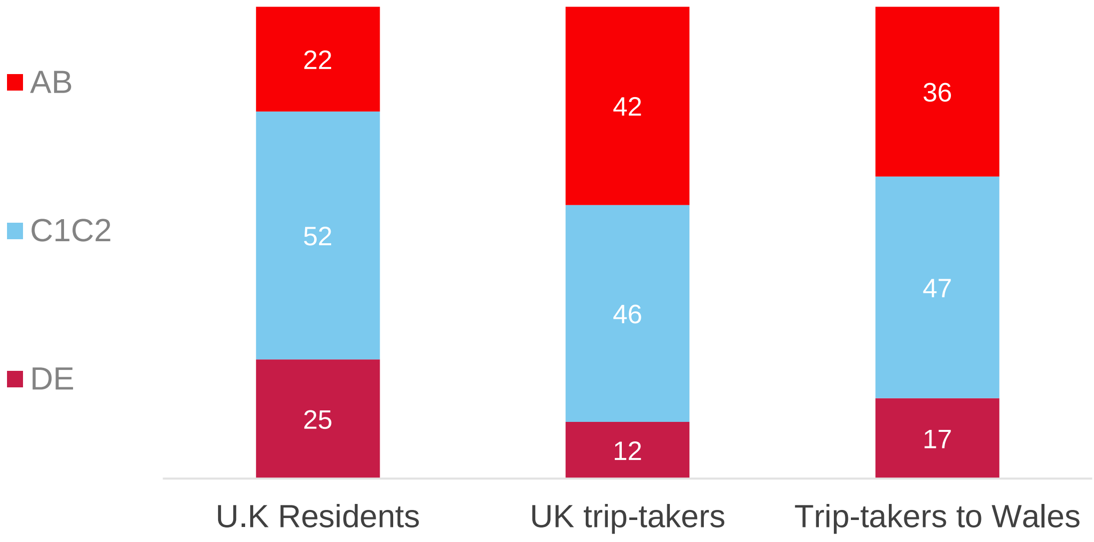


Figure 63. Breakdown of population and trip-takers by social grade, Percentage Waves 29-30, U.K.



Source: Demographics. Base: All respondents. U.K. population n=8947 All U.K. trip takers since April n=510; All Wales trip-takers n=62

Financial impact of COVID-19 on overnight trip-takers

- Both U.K. and Wales trip-takers are more likely to state they are better off financially than before COVID or that they have not been affected.

Figure 64. Breakdown of trip-takers compared to intenders by financial segments, Percentage Waves 29-30, U.K.

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Base: All respondents. U.K. population n=8947 All U.K. trip takers since April n=510; All Wales trip-takers n=62

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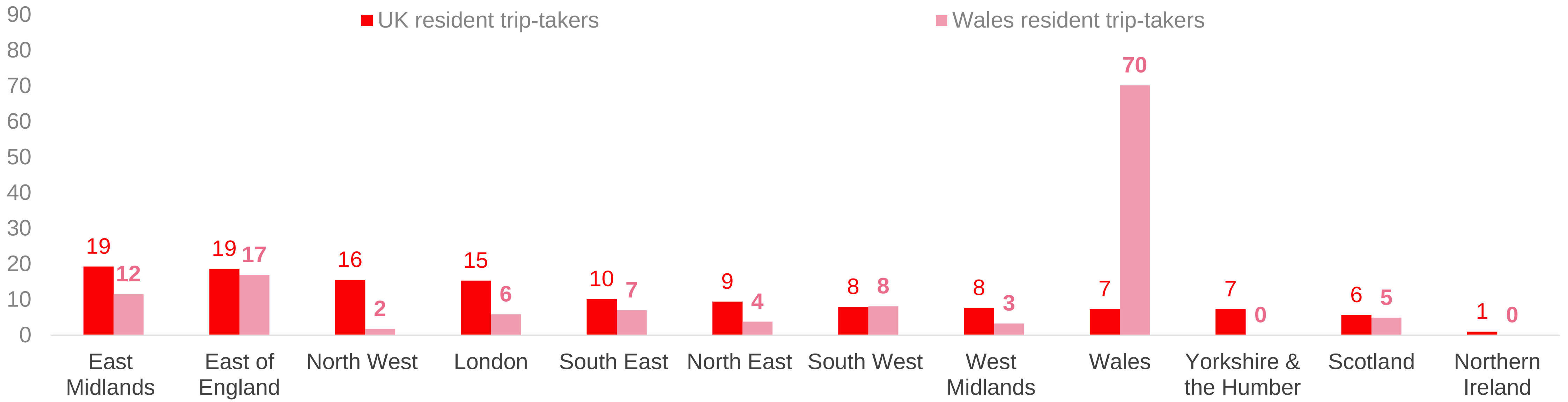
Where stayed on overnight U.K. trips since April

- Trips taken across the UK as a whole since April have a different pattern to normal, with East of England and East Midlands receiving the highest share of trip takers followed by North West England and London.
- This change in UK trip patterns may reflect the higher than normal incidence of visits to friends or family since April.
- Amongst Wales resident trip-takers, Wales was by far the most visited destination at 70%, reflecting travel restrictions in place in Wales for part of April.

Figure 65. Where stayed on April overnight trip , Percentage Waves 29-30, U.K. and Wales Residents, Ranked on holidays

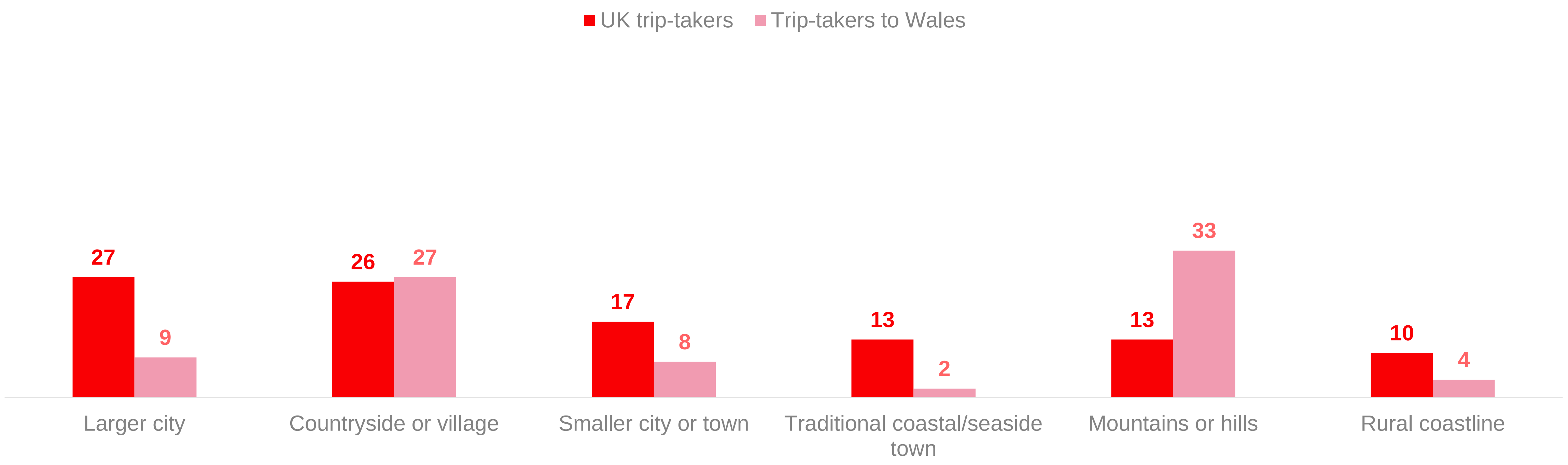


VB13c. Where in the U.K. did you stay on this trip in April?
Base: All respondents that took an overnight trip in the U.K. UK resident trip-takers n=510; Wales resident trip-takers n=57

Types of location of overnight trips taken since April

- The location of trips taken since April also appears to be impacted by the difference in trip types taken in Wales than the UK with most trips in Wales for holidays compared to a mix of holidays and visits to friends and relatives across UK as a whole.
- Trips taken across UK as a whole were much more likely to be to urban areas compared to trips taken in Wales.
- Trips taken in Wales were most likely to have been taken to rural countryside areas.

Figure 66. Main type of destination for April overnight trip, Percentage Waves 29-30, U.K.



VB13d. Which of the following best describes the main type of destination you stayed in during your trip in April?
Base: All respondents that took a trip since April: U.K. trip-takers n=510; Wales trip-takers exclusive n=48

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Ability to take trip originally planned to take

- The vast majority of U.K. and Wales trip takers were able to visit the destination trip they originally planned to in April.
- Of the small minority that didn't, concerns about there being too many people at the destination, worries there wouldn't be enough to do and limited accommodation were the main reasons for not doing so.
- A small minority were also worried about the welcome they would receive and that venues weren't COVID safe.

Figure 67. Proportion that were able to take the overnight domestic trip they originally planned to in April, Percentage Waves 29-30, U.K.

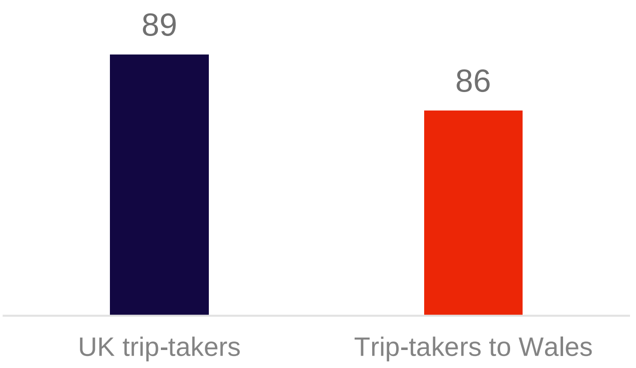
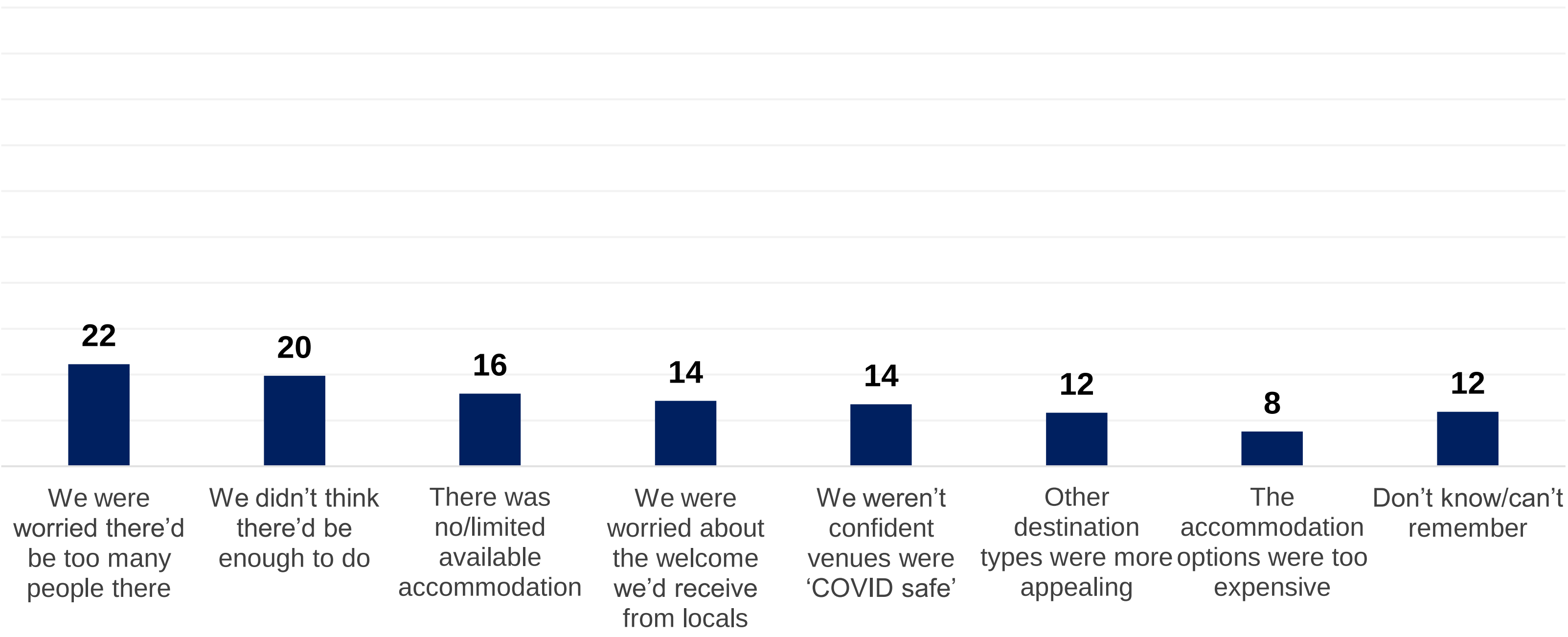


Figure 68. Reasons for not taking trip originally planned to, Percentage Waves 29-30, U.K.

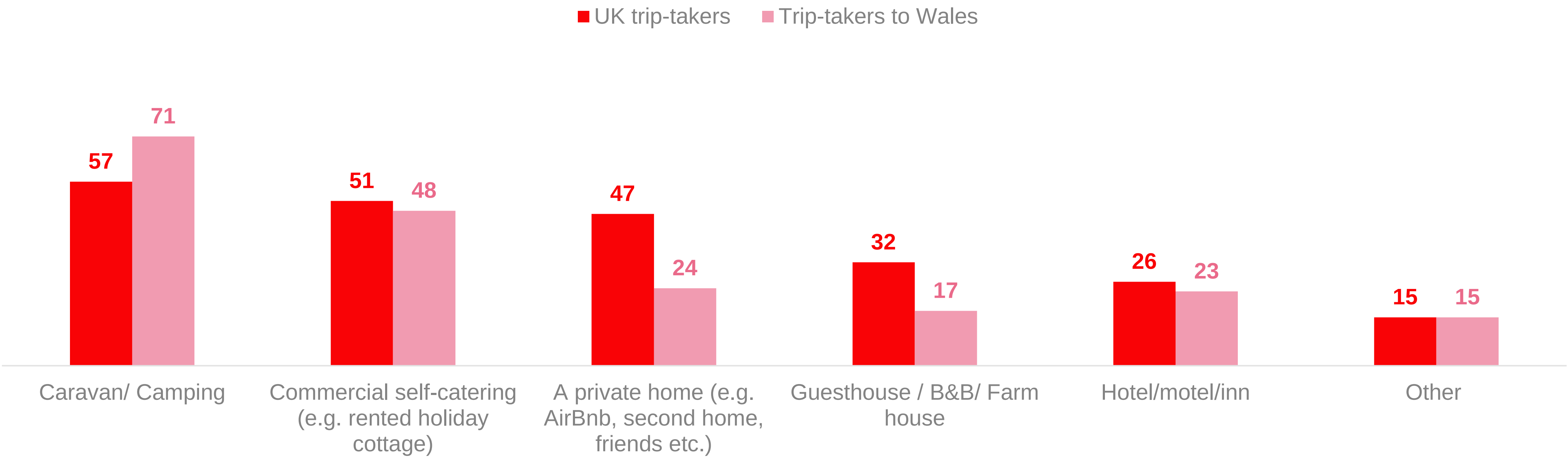


QVB13fii. Thinking of where you actually went, was it in the destination you originally hoped to go to, or did you end up choosing somewhere else? Base: All respondents that took a trip since April: U.K. trip-takers n=510; All that couldn't take the trip originally planned n=68

Types of accommodation used on trips taken since April

- Amongst both U.K. and Wales trip-takers ‘caravan/camping’ and ‘commercial self-catering’ were the two leading accommodation types for trips taken since April.
- ‘Private home’ was also a leading accommodation type for U.K. trip-takers – but less so for Wales trip-takers – driven by the high proportion of visits to friends or relatives.

Figure 69. Accommodation stayed in on April trip, Net percentage, Waves 29-30, U.K.

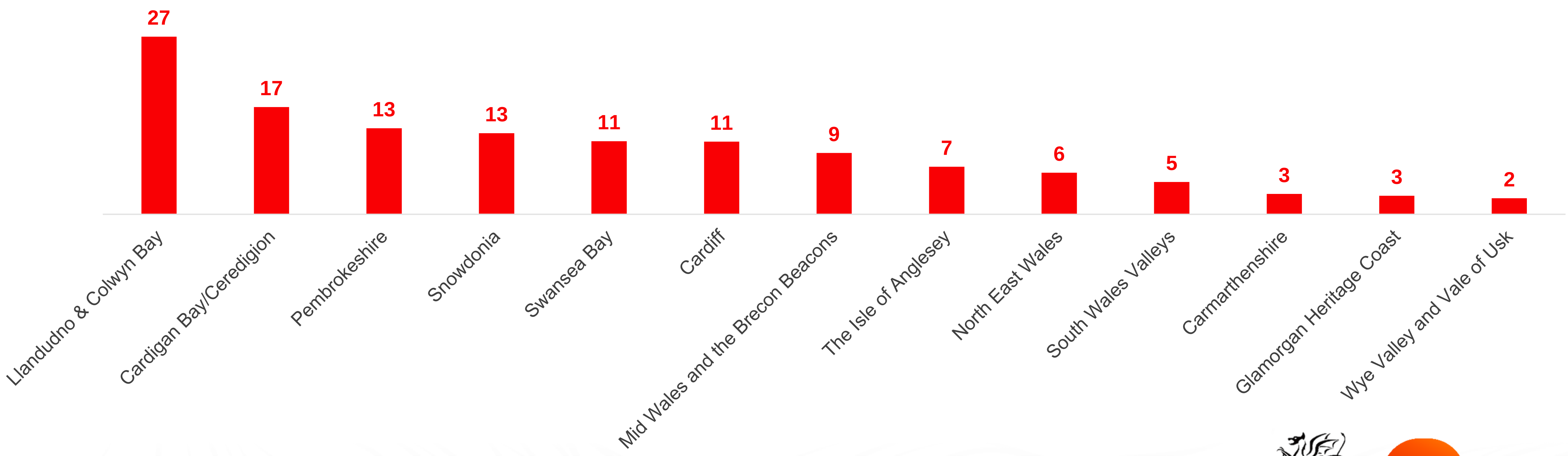


VB13f. In what type/s of accommodation did you stay in during your U.K. trip in April?
Base: All respondents that took a trip since April: U.K. trip-takers n=510; Wales trip-takers exclusive n=48

Where Wales trip-takers visited in Wales

- Trip takers in Wales since April are most likely to have stayed in Llandudno and Colwyn Bay followed by Cardigan Bay, Pembrokeshire and Snowdonia.
- Swansea Bay and Cardiff also make the top 5.

Figure 70. Areas of Wales visited on trip in April, Percentage Waves 29-30, U.K.



VB13cii. Where specifically in these areas did you stay?
Base: All respondents that took a trip to Wales since April. Base n=62

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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 28-30 of the COVID-19 consumer tracker.

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