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COVID-19 UK Tourism Consumer Tracker Survey: Wales profile report 2022 (Waves 44-46)

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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

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Introduction

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VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

The tracker is based on a UK nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales residents to deliver robust weekly samples. The survey has been run since 18th May 2020

The findings in this report are based on data from Waves 44-46. This is based on fieldwork taking place during the following dates:

- **Wave 44: 1st to 7th March**
- **Wave 45: 1st to 7th April**
- **Wave 46: 3rd to 9th May**

In a number of places, and where base sizes allow, the data is based on fewer waves – this is to reflect the most recent public sentiment and intentions.

Where possible results are compared to the equivalent research period in 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:

- **Summer Intenders:** Members of the public who state their next UK holiday or short break will be between June and September 2022.
- **Autumn Intenders:** Members of the public who state their next UK holiday or short break will be between October and December 2022.

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+.

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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

Key findings

Key findings (1)

General sentiment and leisure intentions

1. As of the latest research period in early May, the UK public are significantly more likely to think 'the worst has passed' in relation COVID-19, than 'the worst is still to come', a trend that has been consistent since February this year.
2. Linked to this optimism, 'comfort levels' with the majority of everyday activities are at their highest point to date, and significantly higher than the equivalent period in 2021.
3. The increase in comfort levels is in part driven by older life stages such as older independents and retirees who report a similar comfort average to families and pre-nesters. This marks a departure from reporting since the start of the pandemic where older life stage comfort levels were consistently lower.
4. That said the virus continues to impact leisure intentions amongst a minority, comfort levels with indoor activities not yet at pre-pandemic levels, and some venues/activities still being avoided due to COVID-19. For example, 14% of Wales residents are avoiding 'festivals/exhibitions in an enclosed space', 12% nightclubs, 11% 'indoor play or activity centres' and 10% 'museums/indoor heritage.'
5. Furthermore, despite reporting a similar comfort average to younger life stages, retirees and older independents continue to be less comfortable 'visiting a busy city centre', 'travelling by public transport' and 'visiting an indoor visitor attraction'.
6. The pandemic also appears to have left a legacy in terms of expectations around conditions at indoor leisure venues – 'enhanced cleaning regimes' and 'plentiful hand sanitisers' a requirement for at least a third of UK residents.
7. As UK residents appear to feel more positive about the situation in relation to COVID-19, concerns around finances appear to be growing – 57% of UK residents describing themselves as either 'hit hard financially' or 'having to be careful' in relation to the pandemic.
8. Wales residents report very similar general sentiment to the wider UK population, a near-identical proportion now thinking 'the worst has passed' in relation to COVID. The comfort average is also similar, although Wales residents continue to report lower comfort levels with 'travelling by public transport' and 'visiting a busy city centre'. They also index higher in requiring indoor leisure providers to have conditions in place in order for them to visit.
9. Wales residents are more likely to classify themselves as 'financially cautious'.

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Key findings (2)

Upcoming trip intentions (overnight visitors)

1. Reflecting higher comfort levels, UK and Wales residents anticipate taking significantly more overnight trips in the next 12 months, than the previous 12 months. This is driven by high 'trip confidence', a consistent three quarters of Wales and UK residents confident that UK trips would go ahead for each month of the year – significantly above confidence for the equivalent period in 2021.
2. Despite high confidence, the public anticipate a number of potential barriers to taking UK trips – 'financial barriers' including 'the cost of living', 'personal finances', 'the cost of fuel' and 'rising costs of holidays/leisure' making up the top four. This marks a departure from the start of the year when 'restrictions on travel from government' was the leading barrier, underlining how front-of-mind, the 'cost of living crisis' has become in the public's minds.
3. The strong relative confidence that UK trips would go ahead means that, compared to 2021 more domestic trips are already booked, and a higher proportion of UK residents are anticipating an overnight domestic trip in summer (June to September) and autumn (October to December). In the summer period, the highest incidence of trips are set to take place in August and September.
4. UK overnight trips continue to be favoured to overseas trips, with a large gap in trip intention and trip confidence, driven in part by older life stages who are more confident in taking domestic trips. UK residents anticipate taking marginally more overseas trips in the next 12 months than in the previous 12 months, and 38% of UK summer intenders are *also* anticipating an overseas trip. However, the majority of UK intenders are not planning an overseas trip in the same month as their UK trip, suggesting they may take both types of trips, rather than one or the other.
5. Perhaps notably, confidence that overseas trips would go ahead is very similar to confidence in UK trips in the same period last year – however, in addition to financial factors, leading barriers to taking trips overseas also include 'COVID-related factors' and 'the war in Ukraine'.
6. Domestic summer trip intention is relatively even across life stages, retirees and families the most likely to be planning on taking one. Unsurprisingly, 'families' are the most likely to be intending a trip in August, retirees in September.
7. Unlike domestic trip intention, overseas trip intention strongly correlates with life stage – 'older' life stages less likely to be planning an overseas trip.
8. July to September is the time of year most likely to generate overnight domestic trips to all destination types, particularly to a 'traditional coastal/seaside town' which is set to generate more than twice as much interest as in the autumn.

Key findings (3)

Trips to Wales – profiling and behaviour

1. Consistent with a trend since the start of this research, the South West of England is the most popular region of the UK for an overnight short break or holiday. Wales is the 6th most preferred destination for an overnight trip in summer, although with 9% intention, it is only 3 percentage points behind the 2nd most preferred destination (the North West of England).
2. Wales remains the number one destination for Wales-based residents, although the majority of intenders come from elsewhere in the UK, and intention to visit Wales amongst Wales-based residents has dropped in comparison to the same period in 2021. As a proportion of all intenders within their region, the North West of England and West Midlands generates the highest interest in an overnight trip to Wales.
3. Families are set to be the most represented life stage amongst Wales trip-takers this summer, at 2 in 5, indexing above the general population and UK intenders, and rising to 3 in 5 in August. Retirees have lower representation amongst Wales summer intenders than the population, but index above the population for trips in September.
4. Wales summer intenders are more likely than UK summer intenders to see financial factors as potential barriers to taking summer trips this year – nearly half citing 'rising cost of living', and about a third citing 'the cost of fuel' and 'personal finances'.
5. Snowdonia is the number one intended destination for an overnight trip in Wales this summer (particularly high in June and September), followed closely by Pembrokeshire and Llandudno and Colwyn Bay (the latter highest in August). Compared to 2021, there is a higher incidence of interest in Llandudno and Colwyn Bay, and lower interest in Cardiff and Swansea Bay, driven by the different balance of origin in intenders (e.g. more living in the North West of England and fewer in the South East of England).
6. Wales summer Intenders are most likely to be planning on staying in a 'traditional seaside town', in particular in August', when this destination type makes up a majority of trips. Rural coastline' is the second most preferred destination type for Wales summer intenders, followed by 'countryside or village' in third. 'Countryside or village' is less preferred than in 2021 and than amongst UK intenders.
7. Wales intenders are significantly more likely to be planning a longer trip of 4+ nights than in 2021, and than UK intenders, perhaps reflecting the higher confidence reported.

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Key findings (4)

8. ‘Caravan/camping’ is the leading accommodation choice for Wales summer 2022 intenders, followed by ‘commercial self-catering’ and ‘hotel/motel/inn’.
9. Amongst Wales summer intenders, a ‘partner’ is the most common accompanying party member for a trip, followed by ‘child, grandchild or young adults with parents’ (making up a majority in August). Wales summer intenders are more likely than UK intenders to be taking their trip with children. Compared to summer 2021, Wales summer 2022 intenders are less likely to be travelling with friends.

Trips taken since Jan 2022

1. 21% of UK residents and 24% of Wales residents have taken an overnight domestic trip since January this year, with incidence highest in April. Around 1 in 12 UK and Wales residents have taken an overseas trip since the start of the year.
2. UK trip-takers since January are more likely than the population and overseas trip-takers in that period to belong to older life stages such as retirees and older independents. Both UK and overseas trip-takers since January are less likely than the general population to belong to lower social grades.
3. Consistent with most reporting over the last two years, the South West of England was the destination UK trip-takers were most likely to have stayed in since January 2022, followed by Yorkshire and the Humber, and Scotland.
4. Similar to trip intenders, non-Wales residents make up the majority of trip-takers to Wales, the North West of England, South West of England, London and the West Midlands the leading regions of origin.
5. Families make up the highest proportion of trip-takers to Wales since January 2022, followed closely by retirees, who index significantly above their fall-out in the UK population. Social grades AB also index higher amongst Wales trip-takers since January compared to the UK population.
6. The vast majority of Wales trip-takers since January took their trip for holiday/leisure - at 80%, higher than trip-takers to the wider UK.
7. Trip-takers to Wales since January visited a range of destinations on their trip – Llandudno & Colwyn Bay, Pembrokeshire, Swansea Bay, The Isle of Anglesey and Snowdonia the top 5. Notably, trips to Swansea Bay and Cardiff are more likely to include visits to friends or relatives, compared to other destinations.

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Key findings (5)

Travelling for business

1. 17% of UK adults in employment intend to take an overnight business trip in the next three months, dropping to 8% of Wales residents. ‘Meeting (6+ people)’ is the most prevalent reason for an overnight trip – chosen by 3 in 10 (30%).

Day trip intentions

1. Both UK and Wales residents are most likely to be planning on taking a day trip to a ‘traditional coastal/seaside town’ between June and September, with relatively similar intention for most other destination types.
2. The life stage of day-trippers varies depending on destination type, older life stages more prevalent amongst ‘rural coastline day trippers’ and younger life stages more dominant in ‘large cities’.

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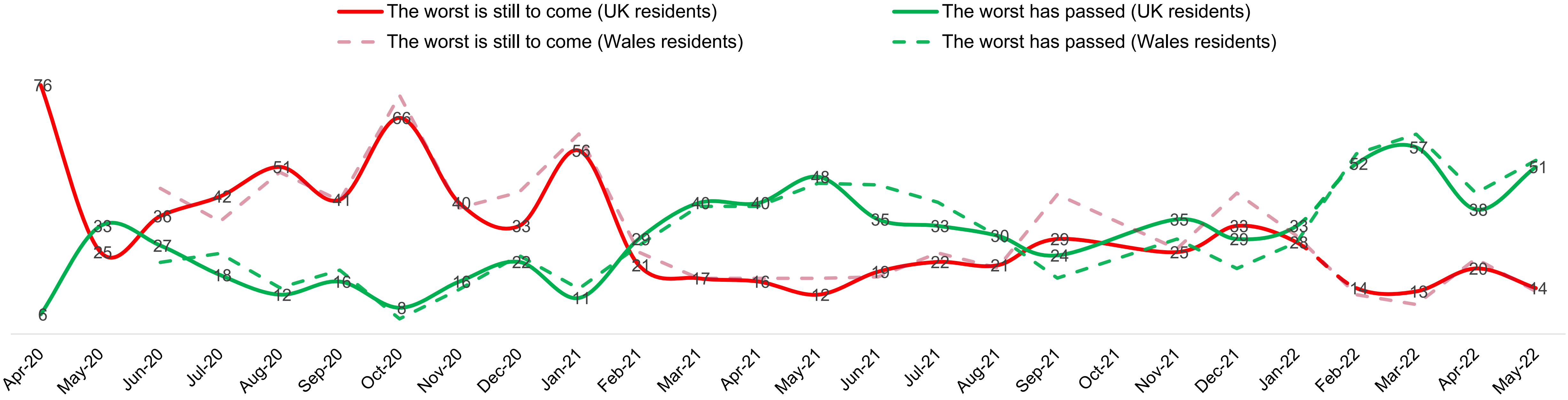
General sentiment and leisure intentions

Perceptions of the situation in relation to COVID-19

- Since February 2022, the proportion of UK and Wales-based adults thinking 'the worst has passed' in relation to COVID-19 has been significantly higher than the proportion thinking 'the worst is still to come'. Although optimism dropped in April, it has since rebounded, with 51% thinking 'the worst has passed' at the start of May – the second highest proportion since the start of the pandemic.
- Since the start of the year, sentiment amongst Wales-based residents has broadly tracked sentiment across the UK.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-46, UK and Wales



Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Wales respondents n=c.200

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Financial segments and concerns

- Over half (57%) of UK residents, and nearly two thirds (64%) of Wales residents have either been ‘hit hard’ financially by the pandemic or ‘are ok but have to be careful’ – both higher than in the equivalent period in 2021.
- The vast majority of UK and Wales residents are concerned about rising living costs/inflation, a potential recession and tax increases. Potential job losses are a concern for just over half.

Figure 2. Breakdown of residents by COVID financial segments, Percentage, Wave 46, UK and Wales

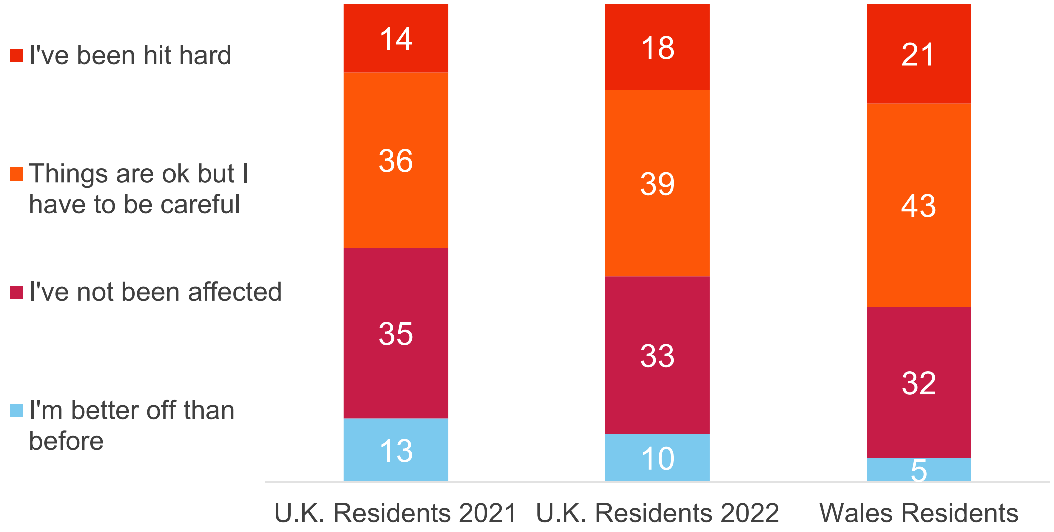
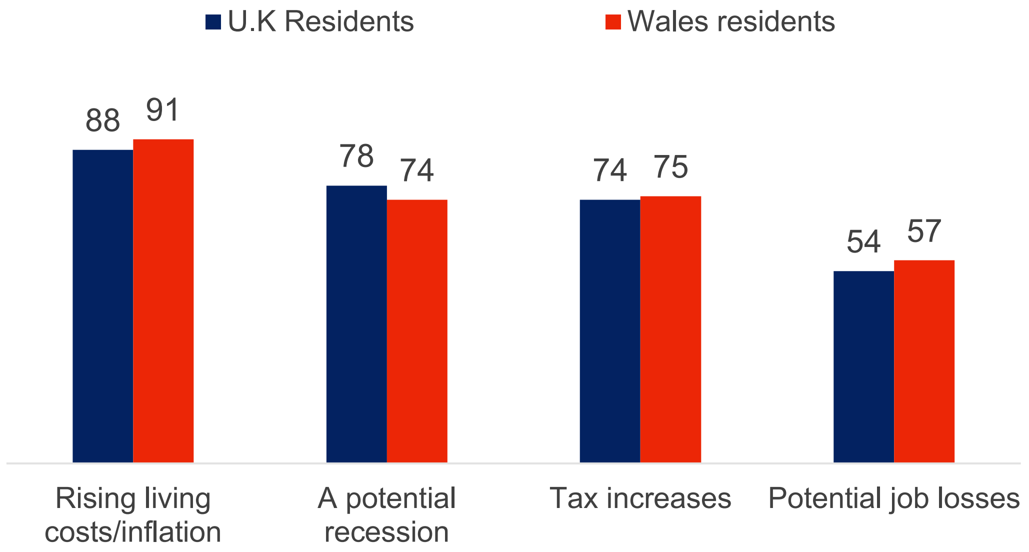


Figure 3. Concerns around economic factors, Percentage very/fairly concerned, Wave 46, UK and Wales



Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Q18d How worried, if at all, are you about the following and their impact on your personal finances? Base: All UK respondents. n=1,760; All Wales respondents n=206.

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Level of comfort undertaking activities

- Since March this year, comfort levels with all 'everyday activities' have hit their highest point since they were first measured within this research. With the exception of 'going for a walk in a country park or local trail' (which has increased by 4 percentage points), all activities report double digit increases in comfort levels since the same period last year (May 2021) – 'going to a busy centre' 30 percentage points higher, 'visiting an indoor attraction' 29 points higher.

Figure 4. Level of comfort conducting individual activities*, Net very and fairly comfortable, Percent, Waves 1-46, 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 (March 2021)

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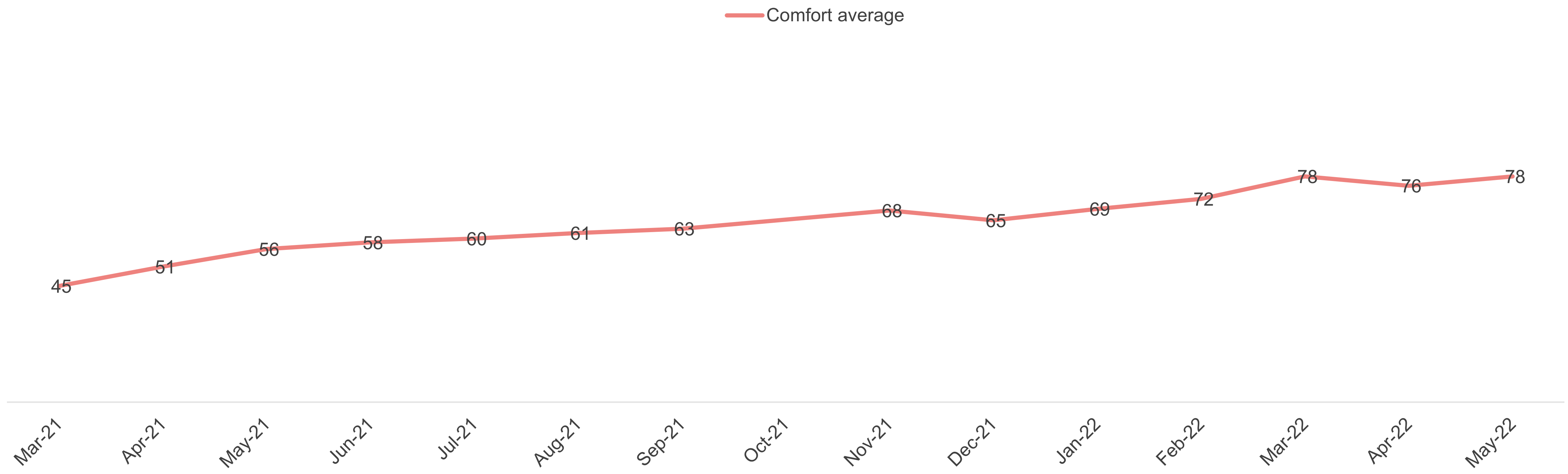
BVA BDRC

Comfort average amongst UK residents*

- The comfort average (the average of all individual activities) has consistently increased since the start of the pandemic, and as of May 2022, sits at 78% - the joint highest level and 22 percentage points higher than the same period in 2021.

Figure 5. Level of comfort conducting individual activities*, Net very and fairly comfortable, Percent, Comfort Average Waves 26-46, 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 (March 2021) so average only shown from this point in time.

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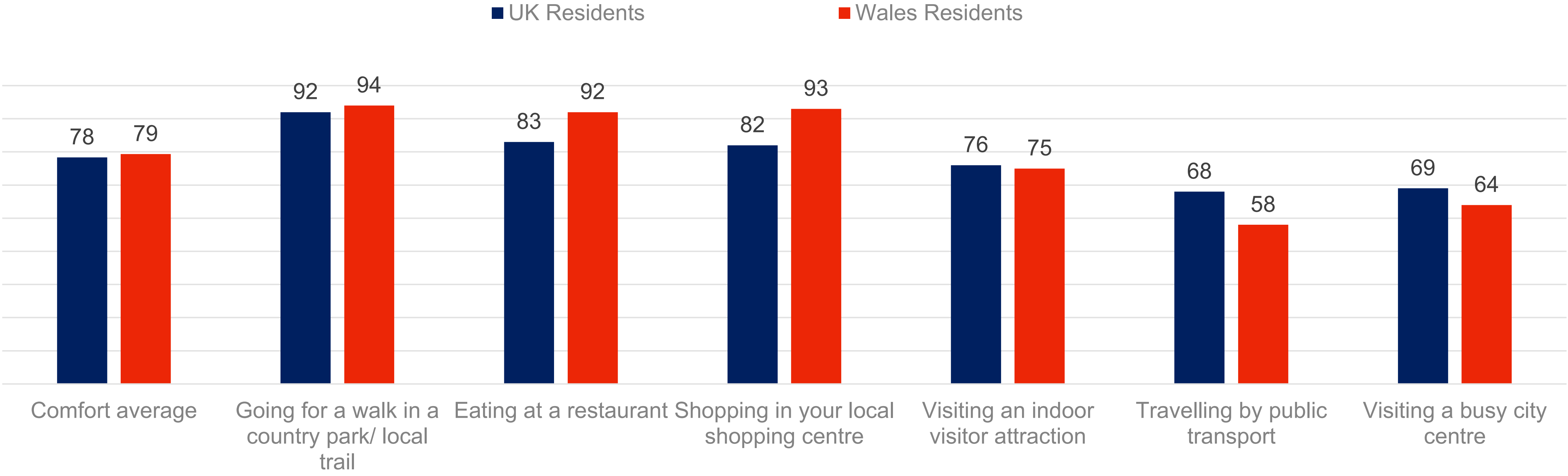
Level of comfort undertaking activities with a 'comfort average'

- Overall, Wales residents report a similar comfort average to UK residents, with higher comfort levels 'going for a walk in a country park/local trial', 'eating at a restaurant' and 'shopping in your local shopping centre'. However, Wales residents report notably lower comfort levels with 'travelling by public transport' and 'visiting a busy city centre'.

Figure 6. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 46, UK and Wales



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: All UK respondents. n=1,760; All Wales respondents n=206

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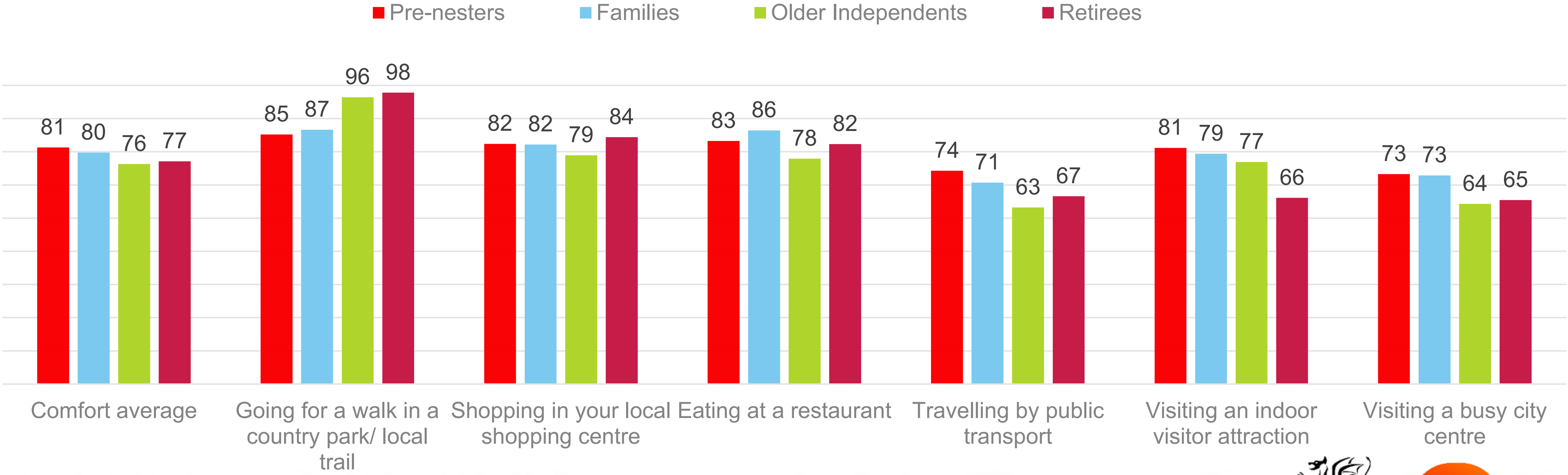
Level of comfort undertaking activities with a ‘comfort average’

- It’s notable that there are minimal differences in the comfort average across life stages, marking a departure from all previous waves where older life stages (such as older independents and retirees) reported lower comfort levels. The overall near-parity is driven by significantly higher comfort levels from older life stages with ‘going for a walk in a country park/local trail’ and broadly similar comfort levels with ‘shopping in your local shopping centre’ and ‘eating at a restaurant’. However, older life stages remain less comfortable ‘visiting a busy city centre’, ‘travelling by public transport’ and ‘visiting an indoor visitor attraction’.

Figure 7. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 46, UK

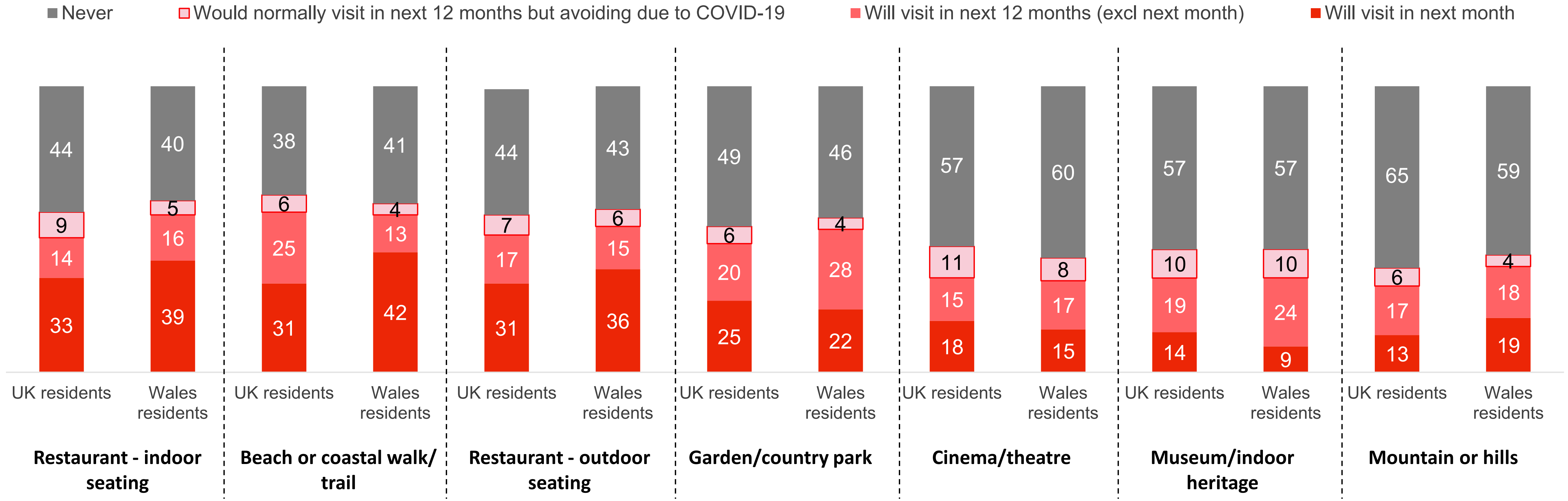


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: All UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319

Future intention to visit leisure venues

- Of the places tested, Wales residents are most likely to intend to visit a ‘beach or coastal walk/trail’ in the next month, followed by ‘a restaurant – with indoor seating’.
- Notably, Wales residents are most likely to be *avoiding* ‘museums/indoor heritage’ and ‘cinemas/theatres’ due to COVID – relatively similar to the wider UK population.

Figure 8. Intention to visit leisure venues, Percentage, Wave 46, UK and Wales



VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All UK respondents. n=1,760; All Wales respondents n=206

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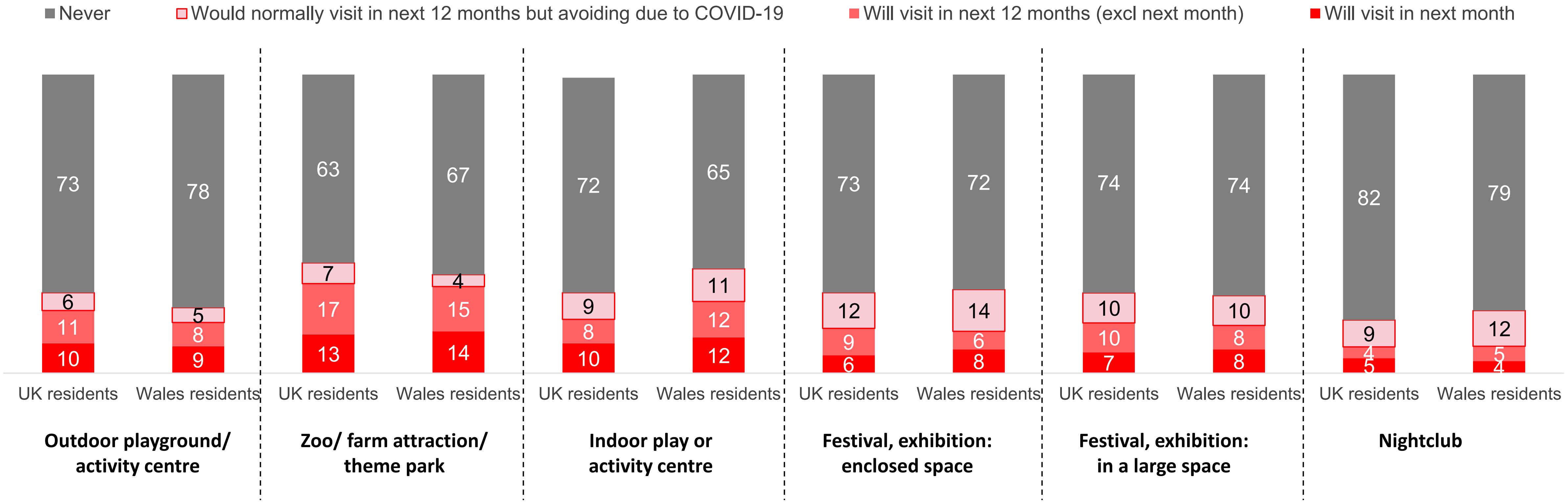
Future intention to visit leisure venues

- A notable proportion of Wales residents also state that they would normally go to ‘festivals/exhibitions in a large space’ (10%) and ‘in an enclosed space’ (14%) in the next 12 months but are avoiding them due to COVID-19, although avoidance of the former has dropped since the previous report at the start of 2022. Around 1 in 9 Wales residents are also avoiding ‘indoor play or activity centres’ and the same proportion are avoiding ‘nightclubs’ due to COVID-19.

Figure 9. Intention to visit leisure venues, Percentage, Wave 46, UK and Wales



VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All UK respondents. n=1,760; All Wales respondents n=206

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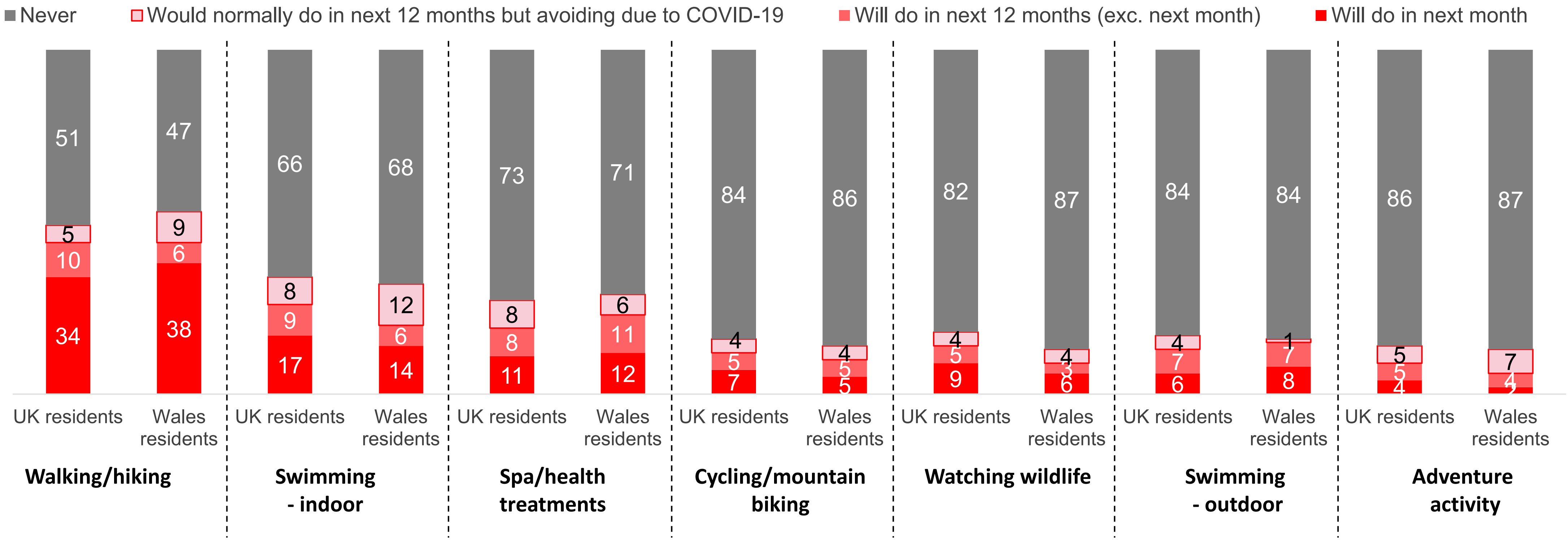
Future intention to conduct leisure activities

- In terms of activities, Wales residents are most likely to go ‘walking/hiking’ in the next month, 2 in 5 (38%) intending to do so – significantly above all other activities measured. Similar to UK residents, Wales residents are most likely to be avoiding ‘indoor swimming’ (12%) due to COVID-19.

Figure 10. Intention to conduct leisure activities, Percentage, Wave 46, UK and Wales



VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? VB10c. Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All UK respondents. n=1,760; All Wales respondents n=206

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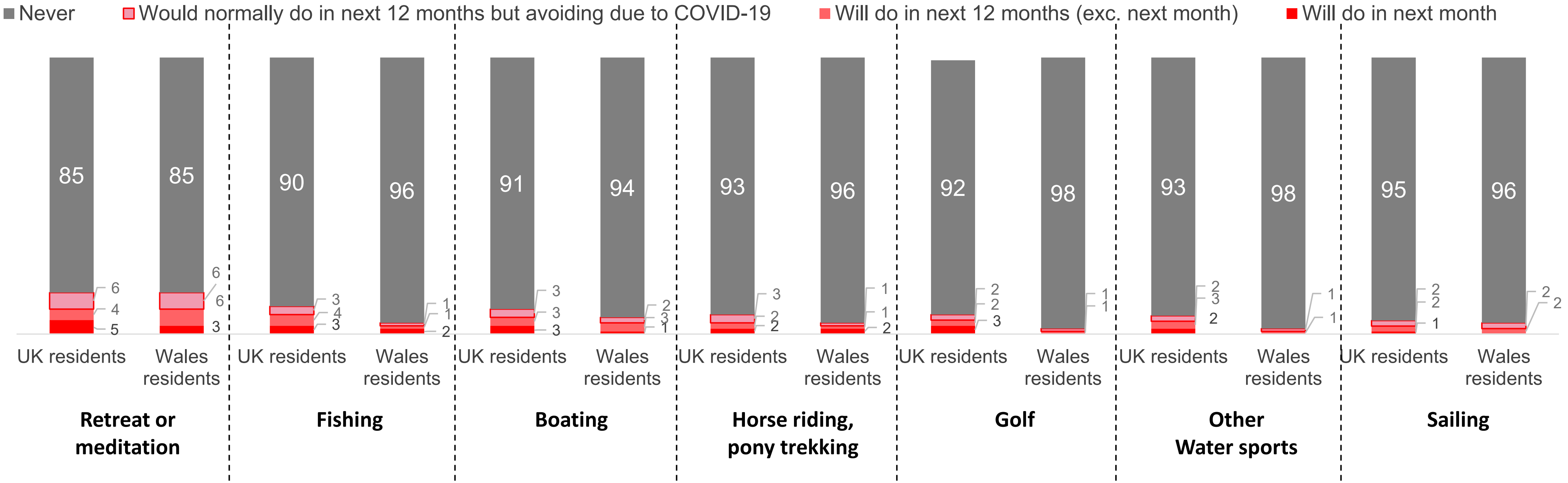
Future intention to conduct leisure activities

- Only a small minority of UK and Wales residents are intending to conduct other leisure activities in the next 12 months.

Figure 11. Intention to conduct leisure activities, Percentage, Wave 46, UK and Wales



VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? VB10c. Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All UK respondents. n=1,760; All Wales respondents n=206

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Conditions essential for tourism/leisure providers to have in place

- ‘Free cancellation’ is the condition both UK and Wales residents consider essential for indoor tourism/leisure providers to have in place, for them to visit in the next few months. Despite higher optimism in relation to COVID-19, cleanliness measures retain importance – ‘enhanced cleanliness regimes’ and ‘plentiful hand sanitizers’ are the second and third most important requirements.
- Consistent with previous reports, Wales residents tend to see more conditions as essential to have in place.

Figure 12. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, Wave 46, UK and Wales, Top 10 amongst Wales residents

Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months?
Base: All UK respondents. n=1,760; All Wales respondents n=206

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Travel confidence and trip intentions

Anticipated number of UK and overseas overnight trips

- Both UK and Wales residents anticipate taking more UK overnight trips in the next 12 months than they took in the previous 12 months. Consistent with reporting at the start of the year, around a third anticipate taking more compared to around 1 in 8 expecting to take fewer.
- UK and Wales residents also anticipate taking more overseas trips in the next 12 months – more so than at the start of the year, suggesting overseas travel is becoming more appealing as restrictions are lifted. Wales residents are more unsure about overseas travel, which is reflected in lower trip intention (see page 35). However, uncertainty about overseas travel has dropped significantly since the start of the year.

Figure 13. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 46, UK and Wales

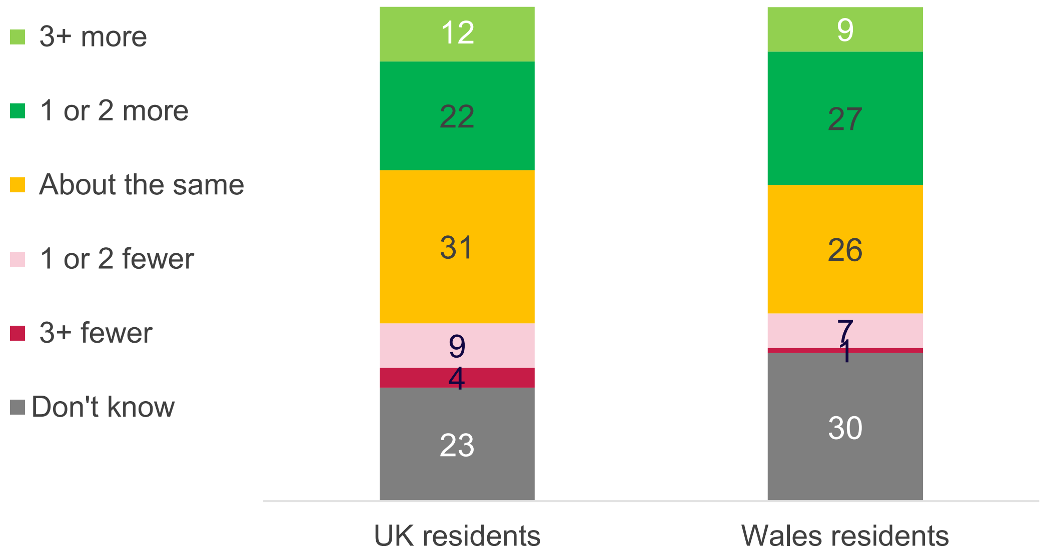
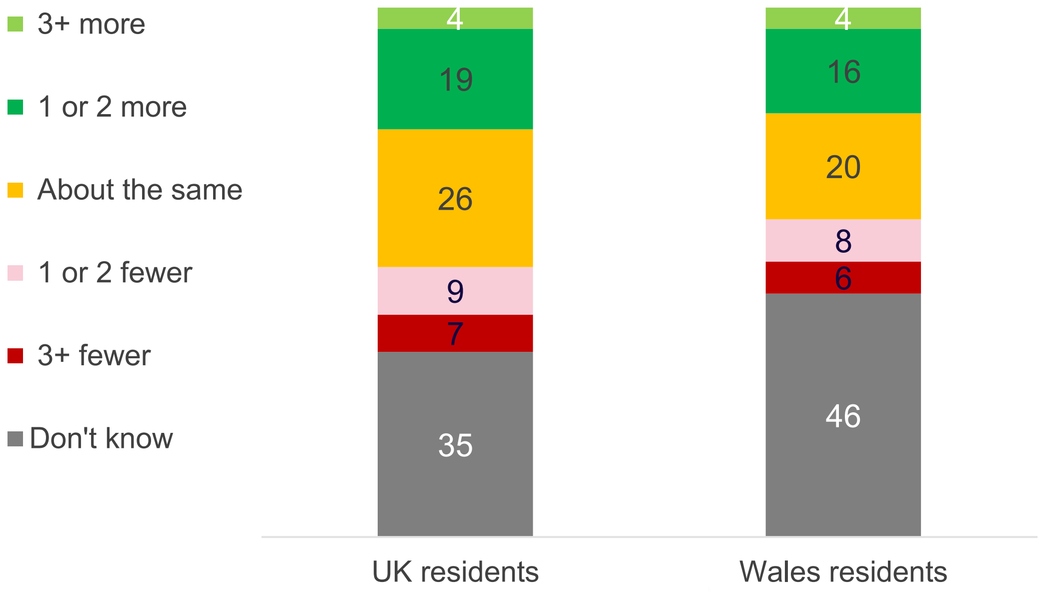


Figure 14. Number of OVERSEAS overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 46, UK and Wales



VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? VB1b. Do you think you are likely to spend more, less or about the same amount of money on UK and overseas holidays/short breaks in the next 12 months as you did in the last 12 months? Base: All UK respondents. n=1,760; All Wales respondents n=206

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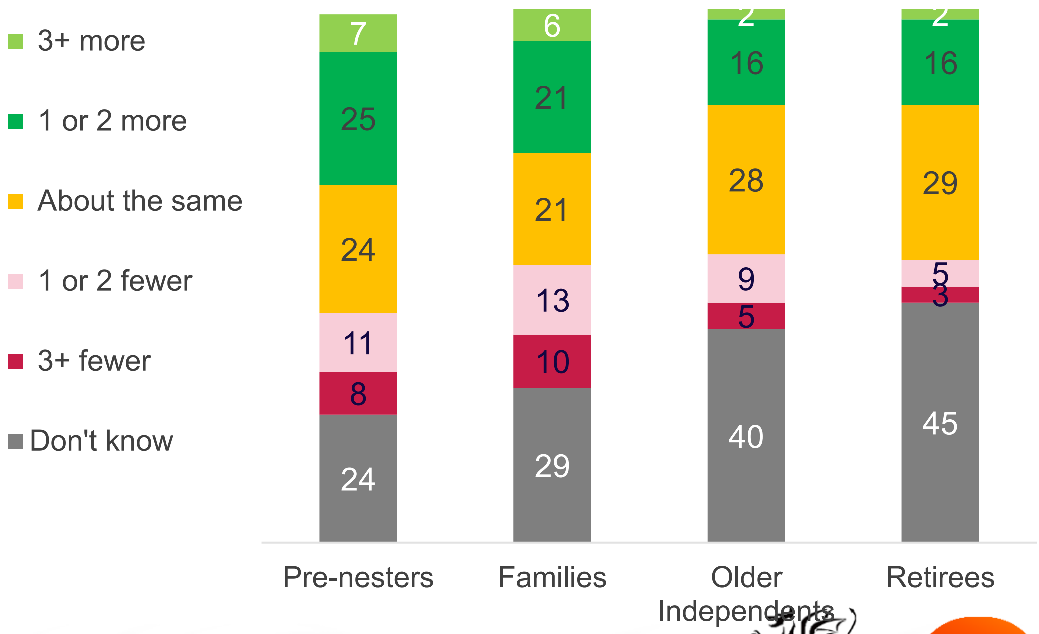
Anticipated number of UK and overseas overnight trips

- All life stages anticipate more UK and overseas overnight trips in the next 12 months than they did in the previous 12 months. Pre-nesters and families are the most likely to be anticipating more trips. Whilst older independents and retirees are less likely to be doing so, this is in part driven by a higher proportion of 'don't knows', suggesting there is potential for them to take more trips than currently planned.

Figure 15. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 46, UK

Figure 16. Number of OVERSEAS overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 46, UK



VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: All UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319

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Anticipated financial spend on UK and overseas overnight trips

- Consistent with trip intention, both UK and Wales residents anticipate spending more money on domestic and overseas overnight trips in the next 12 months compared to the last 12 months.

Figure 17. Anticipated financial spend on UK holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 46, UK and Wales

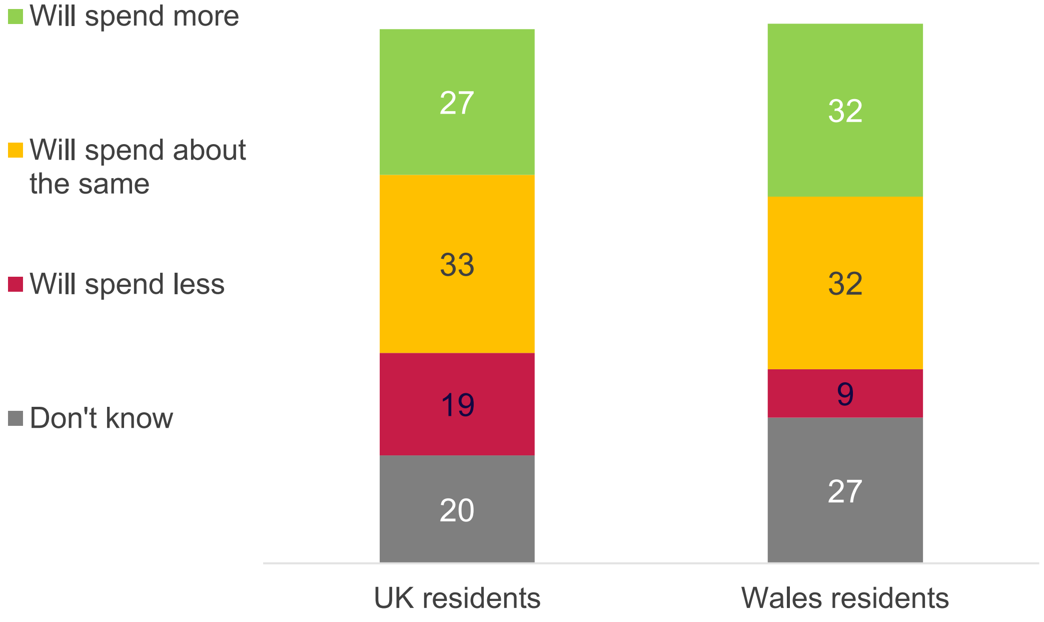
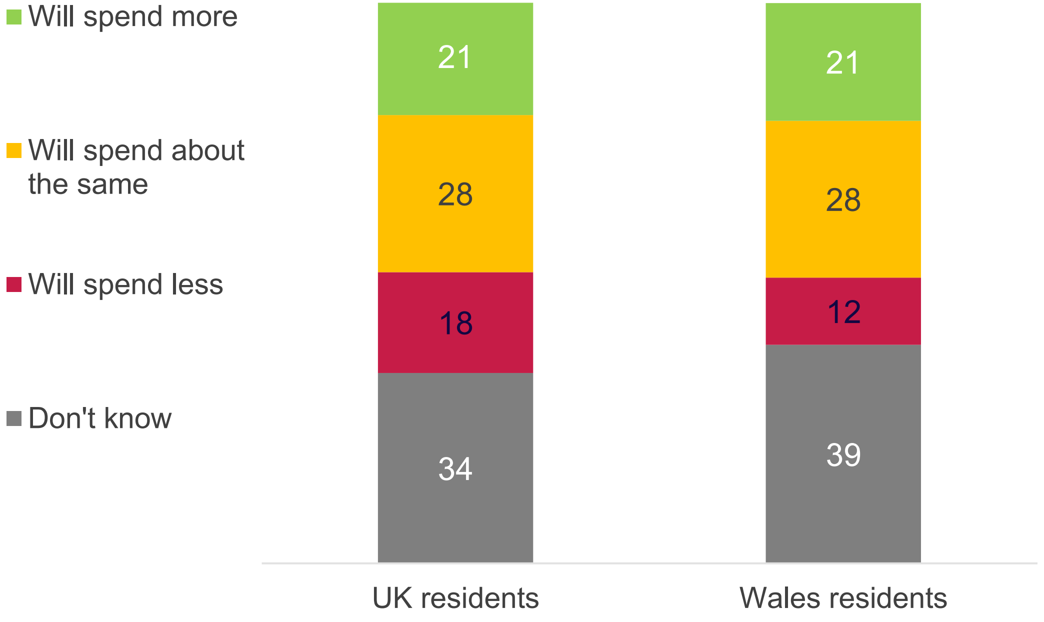


Figure 18. Anticipated financial spend on OVERSEAS holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 46, UK and Wales



VB1b. Do you think you are likely to spend more, less or about the same amount of money on UK and overseas holidays/short breaks in the next 12 months as you did in the last 12 months? Base: All UK respondents. n=1,760; All Wales respondents n=206

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Anticipated financial spend on UK and overseas overnight trips

- All life stages anticipate spending more money on UK overnight trips in the next 12 months than the previous 12 months. For overseas trips, 'pre-nesters' and 'retirees' anticipate spending more, with 'families' and 'older independents' expecting to spend the same.
- Similar to number of trips, older life stages are more likely to indicate they 'don't know' about their future spending.

Figure 19. Anticipated financial spend on UK holidays and short breaks in next 12 months compared to the last 12 months by life stage, Percentage, Wave 46, UK

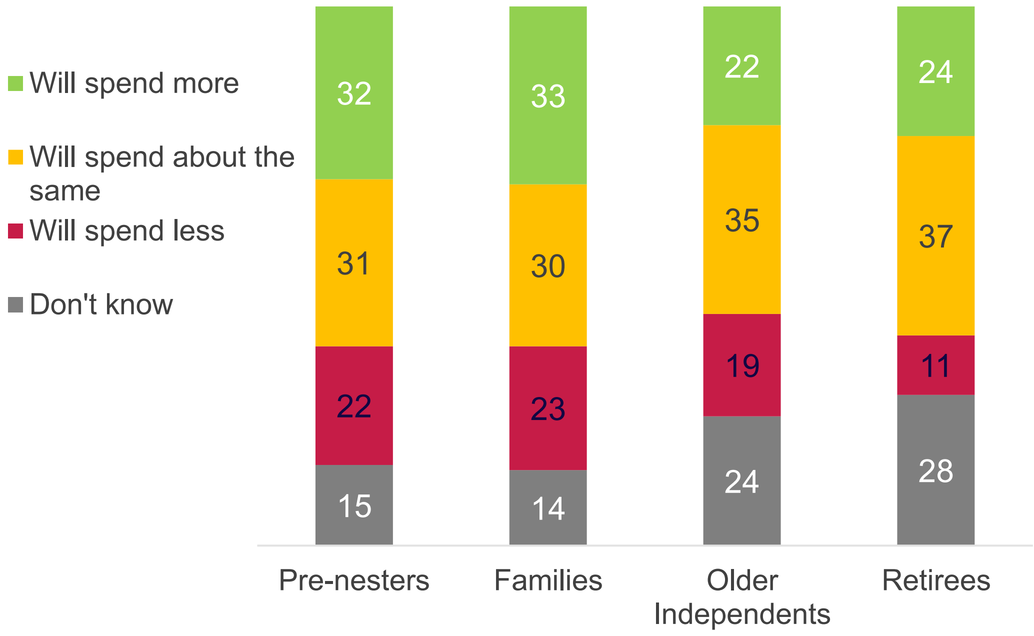
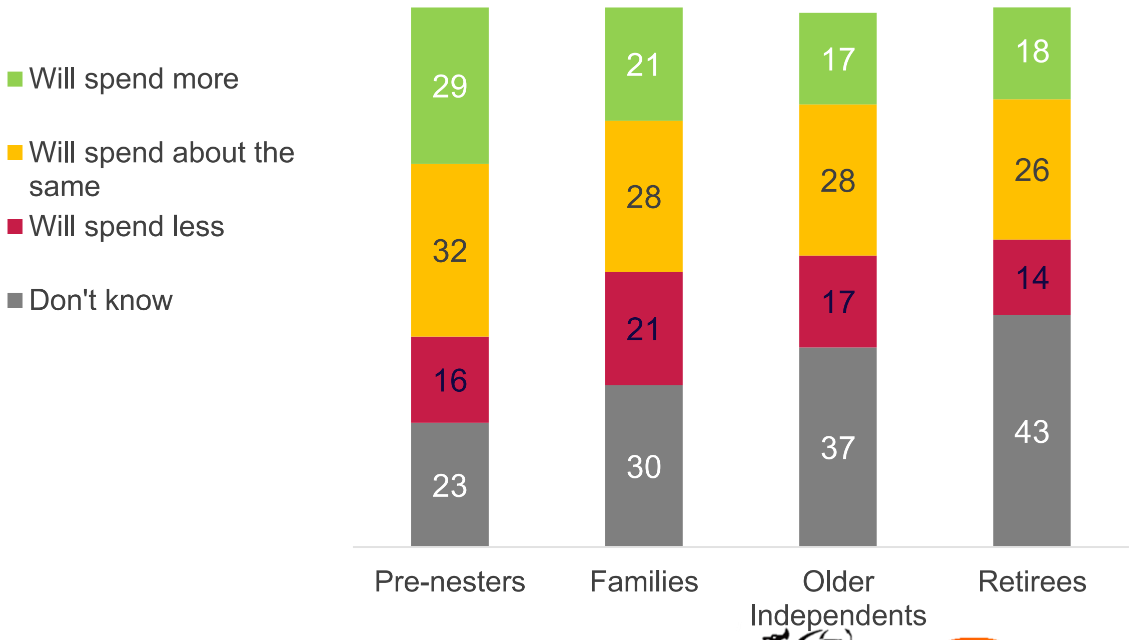


Figure 20. Anticipated financial spend on OVERSEAS holidays and short breaks in next 12 months compared to the last 12 months by life stage, Percentage, Wave 46, UK



VB1b. Do you think you are likely to spend more, less or about the same amount of money on UK and overseas holidays/short breaks in the next 12 months as you did in the last 12 months? Base: All UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319

Confidence in the ability to take a short break or holiday

- Around three quarters of Wales and UK residents are confident that a UK trip would go ahead as planned between June and the end of the year, confidence is significantly higher than in the equivalent period in 2021, and tailing off only slightly in the autumn months.
- Around 3 in 5 UK and Wales residents are confident an overseas trip would go ahead as planned between June and December, significantly lower than UK trip confidence this year, and roughly equivalent to UK trip confidence in 2021.

Figure 21. Confidence in taking a UK overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, Wave 46, UK

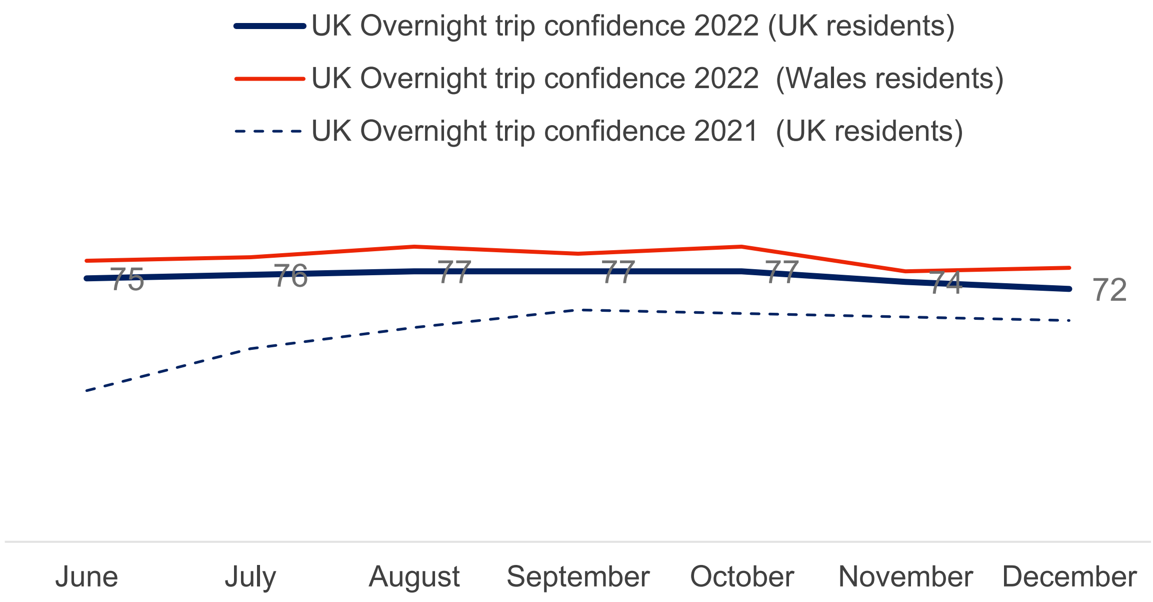
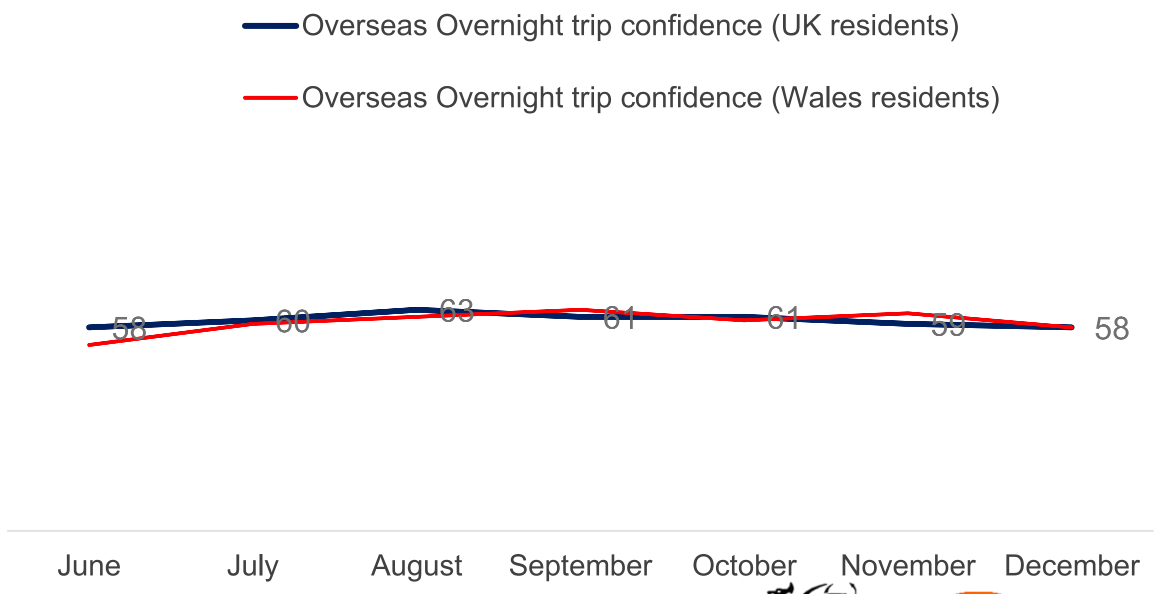


Figure 22. Confidence in taking an Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, Wave 46, UK



QVB7anew. We'd like you to imagine that you have booked a UK/OVERSEAS 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 UK respondents. n=1,760; All Wales respondents n=206

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Confidence in the ability to take a short break or holiday

- UK trip confidence is relatively similar across all life stages, with ‘older independents’ and ‘retirees’ exhibiting more confidence than other life stages between September and November.
- For overseas trips, younger life stages are significantly more confident trips would go ahead for each month. Notably, the difference in confidence between UK and overseas trips for ‘pre-nesters’ and ‘families’ is narrower than for older life stages, suggesting they are most likely to engage in international travel.

Figure 23. Confidence in taking a UK trip across different time periods by life stage, NET Confident, Percentage, Wave 46, UK

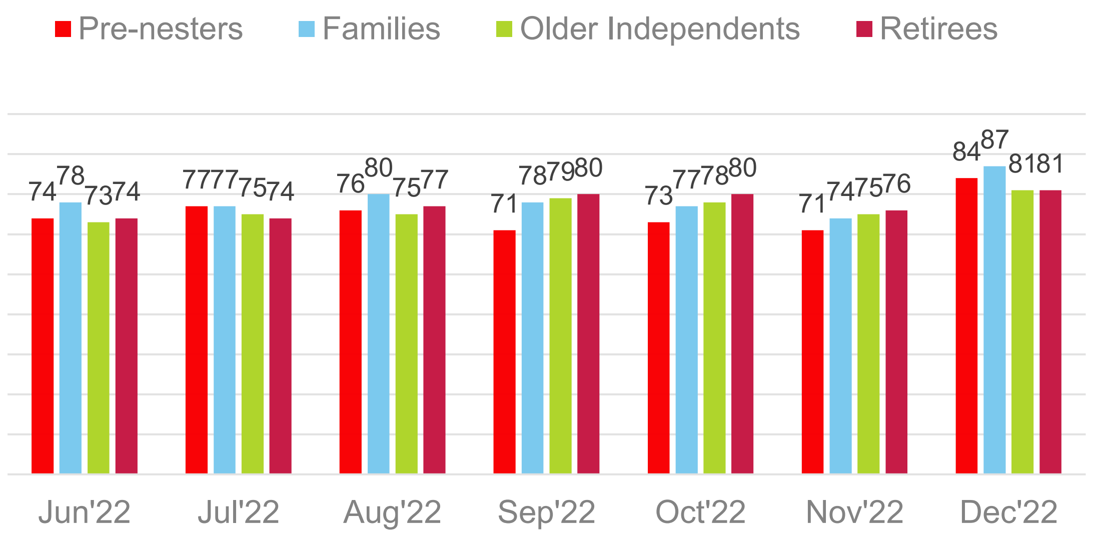
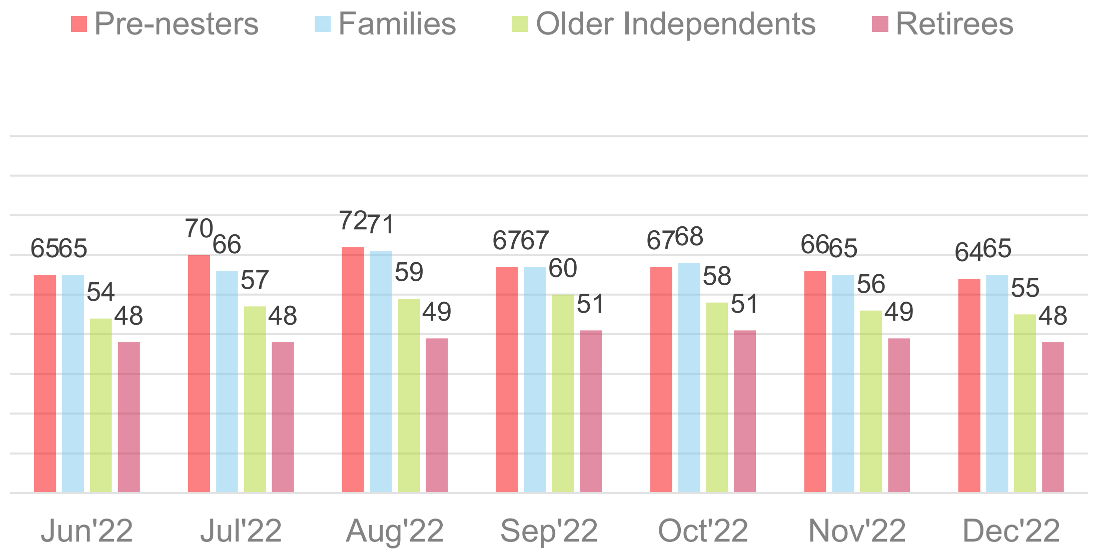


Figure 24. Confidence in taking an overseas trip across different time periods by life stage, NET Confident, Percentage, Wave 46, UK



QVB7anew. We’d like you to imagine that you have booked a UK/OVERSEAS 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 UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319

Perceived barriers to taking UK/overseas holidays and short breaks

- The perceived barriers to taking an overnight UK trip this summer are dominated by finances and the economy - ‘the cost of living’, ‘personal finances’, ‘the cost of fuel’ and ‘rising costs of holidays/leisure’ making up the top four.
- Financial barriers also make up the top three barriers to overseas travel, although the war in Ukraine and the risk of quarantine are the fourth and fifth leading barriers.
- Wales residents are more likely than UK residents to cite financial barriers for both domestic and international travel.

Figure 25. Barriers to taking an overnight UK trip in Summer 2022, Percentage, Waves 45 to 46, UK and Wales, Top 10

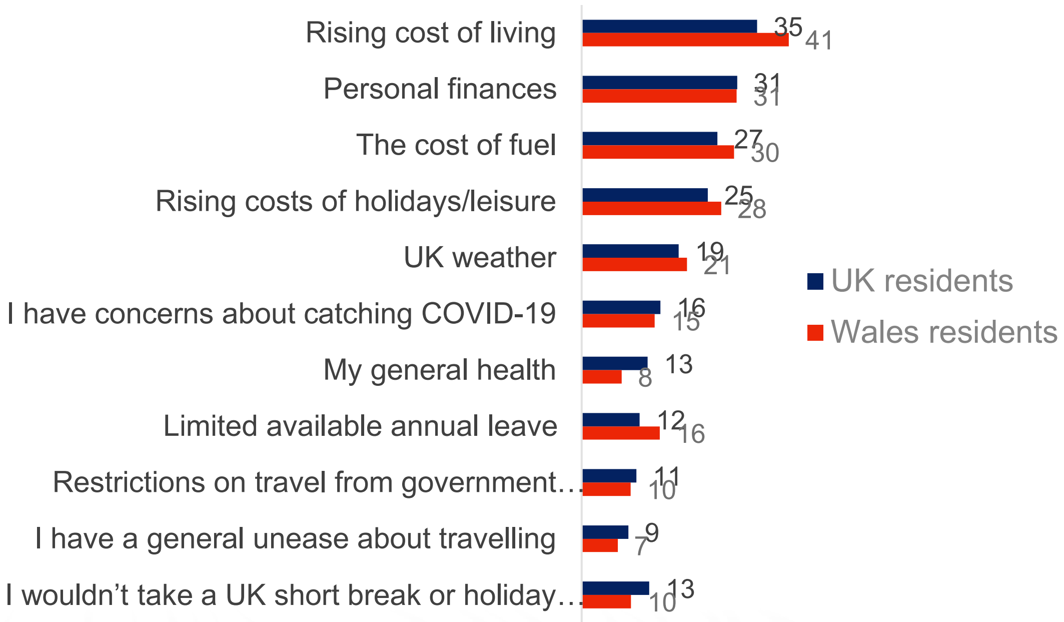
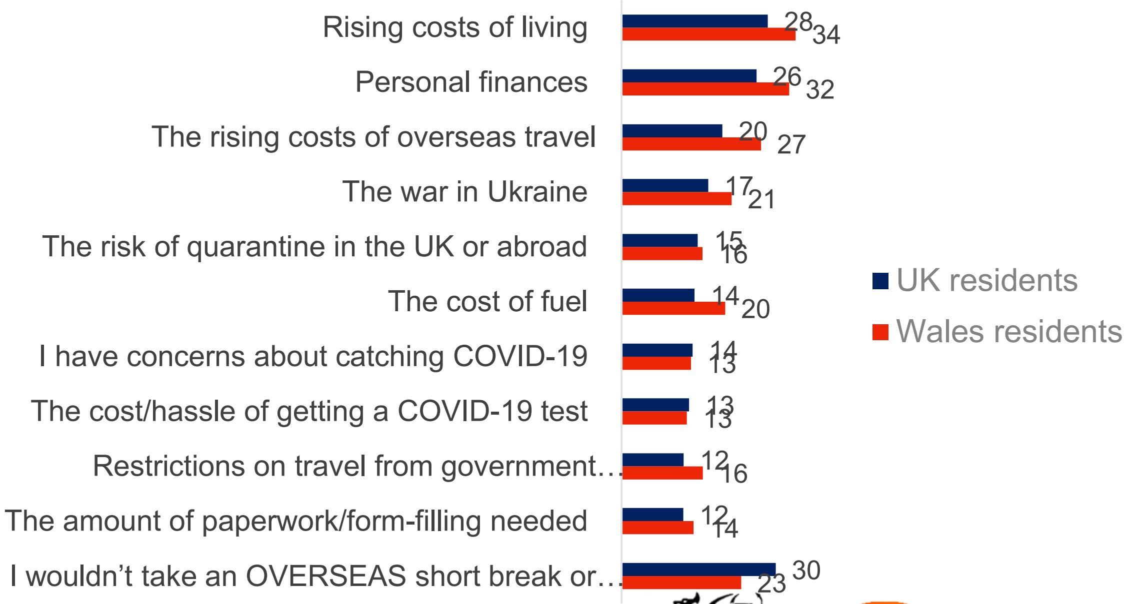


Figure 26. Barriers to taking an overnight OVERSEAS trip in Summer 2022, Percentage, Waves 45 to 46, UK and Wales, Top 10



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: April and May fieldwork to boost base sizes. Figure 11. UK residents n=2,343; Wales residents n=269. Figure 12. UK residents n=2,343; Wales residents n=269.

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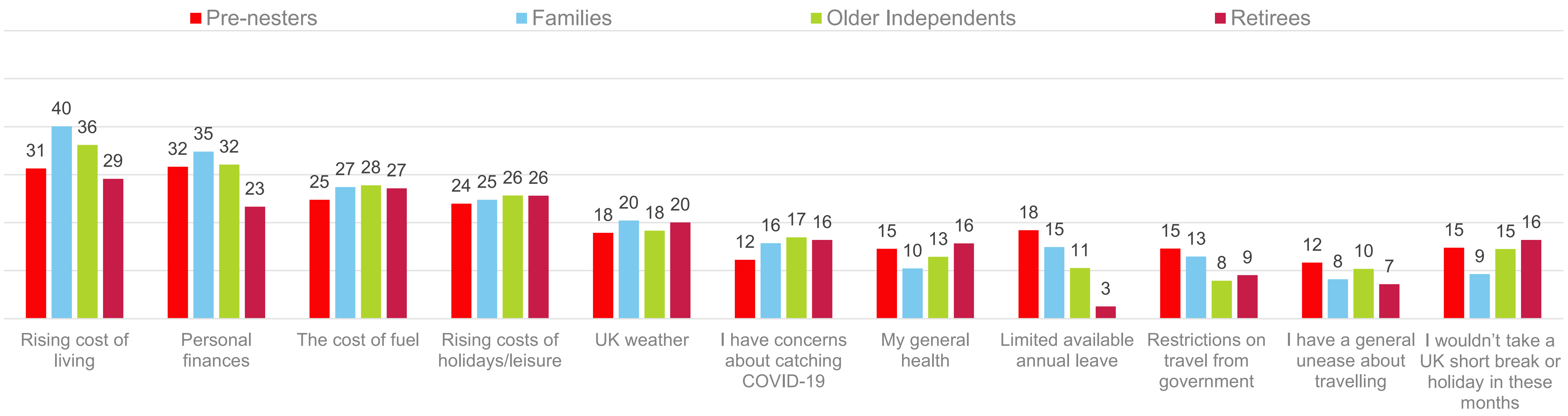
Perceived barriers to taking UK holidays and short breaks

- The perceived barriers to take UK trips differ somewhat by life stage. Families are the most likely to cite ‘rising cost of fuel’ and ‘personal finances’ – retirees the least likely to, although significant proportions of all life stages state these to some degree.

Figure 27. Barriers to taking an overnight UK trip in Summer 2022 by life stage, Percentage, Waves 45 to 46, UK, Top 10

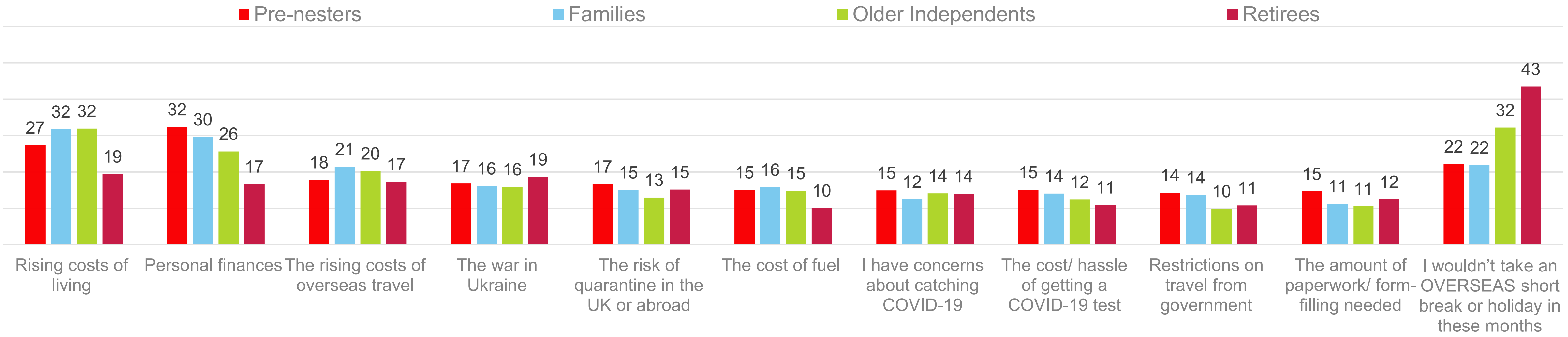


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: December and January fieldwork to boost base sizes. Pre-nesters n=484; Families n=815; Older Independents n=633; Empty Nesters n=411

Perceived barriers to taking overseas holidays and short breaks

- The pattern of perceived barriers for overseas travel this summer is relatively consistent with UK travel – ‘families’ broadly most likely to cite factors relating to finances.

Figure 28. Barriers to taking an overnight OVERSEAS trip in Summer 2022 by life stage, Percentage, Waves 45 to 46, UK, Top 10



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: December and January fieldwork to boost base sizes. Pre-nesters n=484; Families n=815; Older Independents n=633; Empty Nesters n=411

Upcoming UK and overseas overnight trip intention

- Around 2 in 5 UK residents (42%) and Wales residents (38%) anticipate taking an overnight domestic trip this summer (between June and September), the highest incidence of trips taking place in August and September. Around 1 in 4 plan on taking a trip in Autumn. At a UK level, this represents a higher proportion of domestic trips across both seasons than projected at the same point in 2021.
- 1 in 5 (22%) UK residents plan on taking an overseas summer trip, lower amongst Wales residents (15%). Overseas summer trips are spread relatively evenly across summer months. Nearly 1 in 5 UK and Wales residents plan on taking an Autumn overseas trip.

Figure 29. Proportion anticipating going on any overnight UK trips, Percentage, Wave 46, UK and Wales

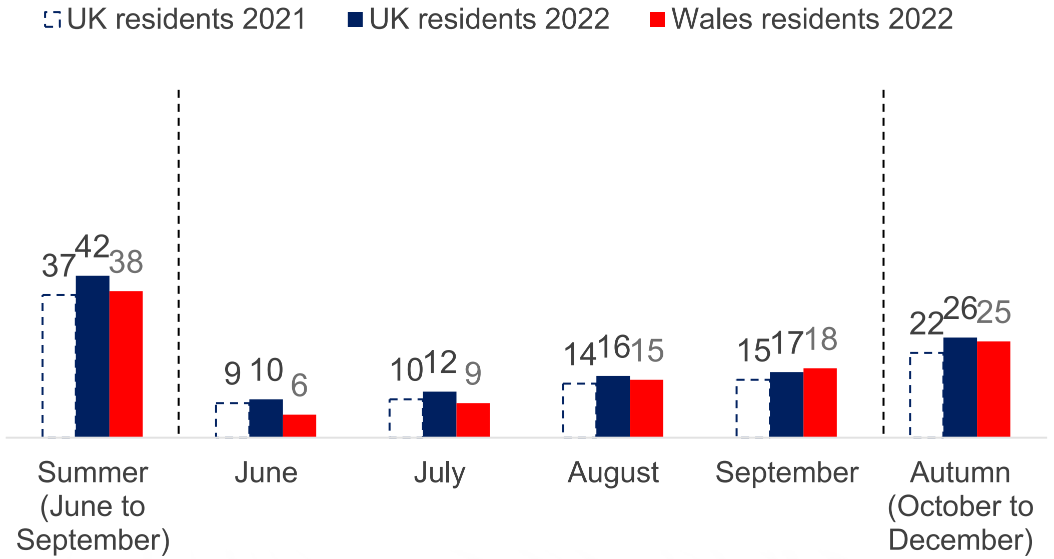
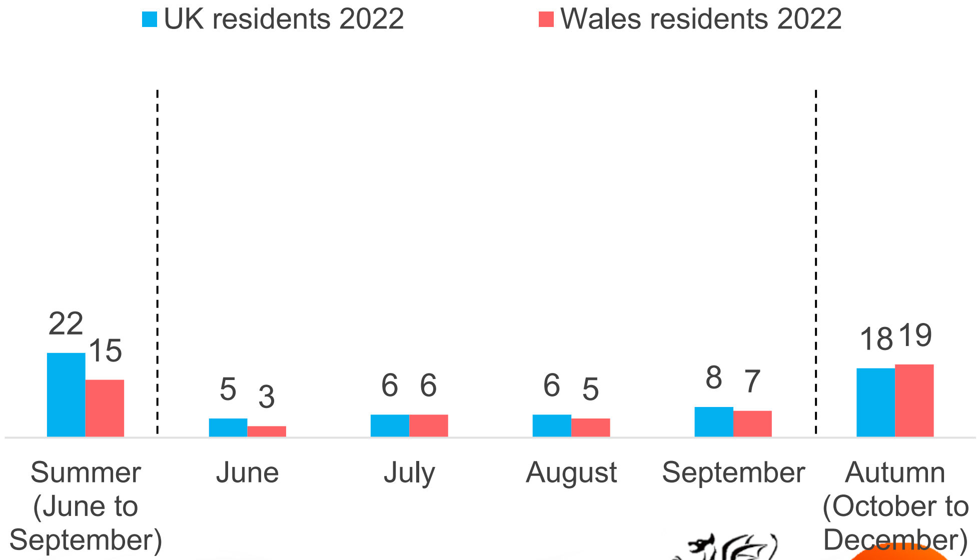


Figure 30. Proportion anticipating going on any overnight OVERSEAS trips, Percentage, Wave 46, UK and Wales



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,760; All Wales respondents n=206

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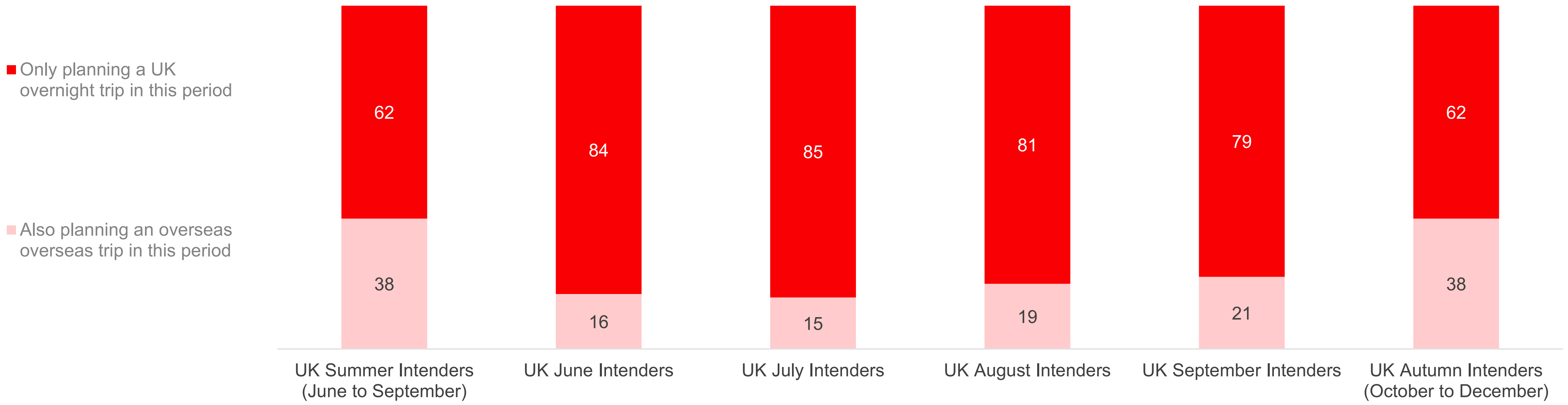
Incidence of UK and overseas trip intention

- Of the 42% of UK residents planning an overnight summer trip (see previous page), around 2 in 5 (38%) anticipate also taking an overseas trip in this period. The majority of UK intenders only plan on taking a UK trip although a notable minority (around 1 in 6 in each summer month) also plan on taking an overseas trip in the same month, suggesting a proportion are either undecided over whether to holiday at home or abroad, or plan on multiple trips. In autumn, 2 in 5 UK intenders also plan an overseas trip.

Figure 31. Breakdown of UK trip intenders by UK/overseas trip intention, Percentage, Wave 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: UK summer intenders n=737; UK June intenders n=175; UK July intenders n=215; UK August Intenders n=291; UK September intenders n=297; UK Autumn Intenders n=465

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Upcoming UK and overseas overnight trip intention

- UK Summer trip intention is relatively even across life stages, ‘retirees’ (44%) and ‘families’ (43%) the most likely to be planning on taking one. Unsurprisingly, ‘families’ are the most likely to be intending a trip in August, retirees in September.
- Consistent with patterns in trip confidence, overseas summer trips are most likely to be planned amongst ‘pre-nesters’ and ‘families’. However, the gap in intention between UK and overseas trips is apparent across all life stages.

Figure 32. Proportion anticipating going on any overnight UK trips by life stage, Percentage, Wave 46, UK

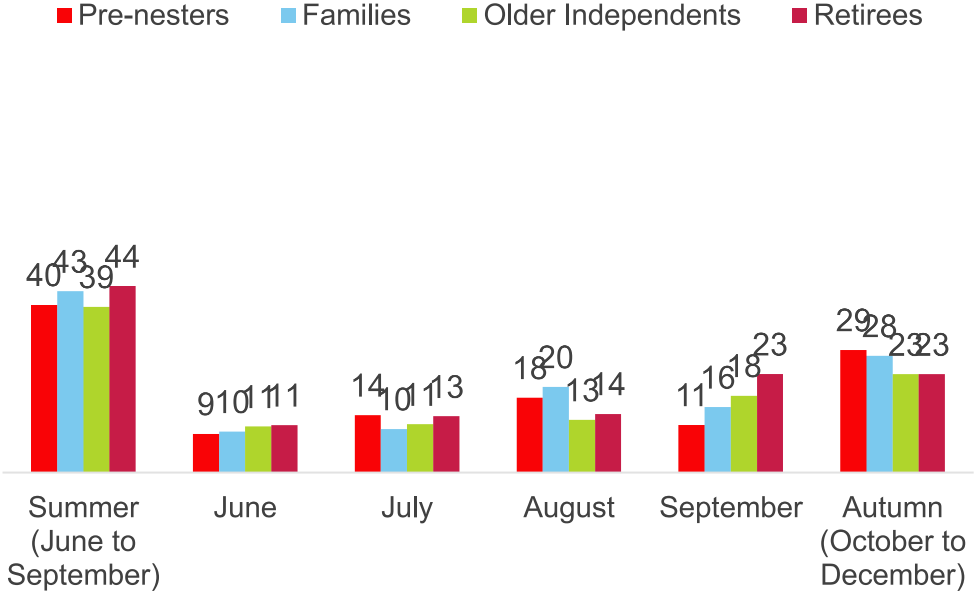
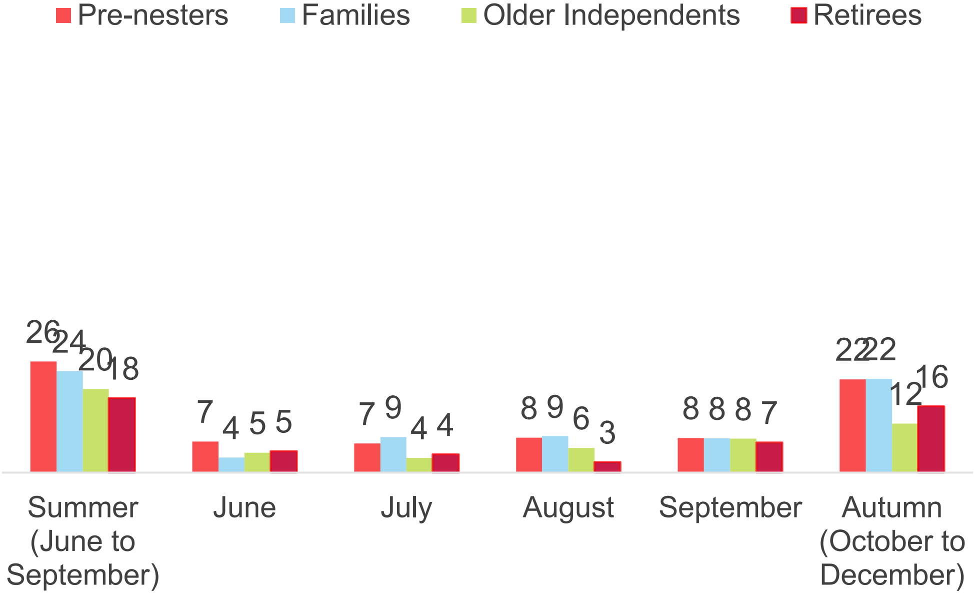


Figure 33. Proportion anticipating going on any overnight OVERSEAS trips by life stage, Percentage, Wave 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319

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Upcoming UK and overseas overnight trip intention

- The distribution of UK trip intenders this summer and autumn is broadly in line with the fall-out in the UK population, a contrast to 2021, when older life stages indexed slightly lower. Families have the highest representation in August (making up 38% of intenders), retirees and older independents in September (at 30% each), the former with significantly higher representation than in the population.
- For overseas trips, families dominate July and August intenders, with 'pre-nesters' consistently indexing above their fall-out in the population.

Figure 34. Breakdown of population and UK intenders by life stage, Percentage Wave 46, UK

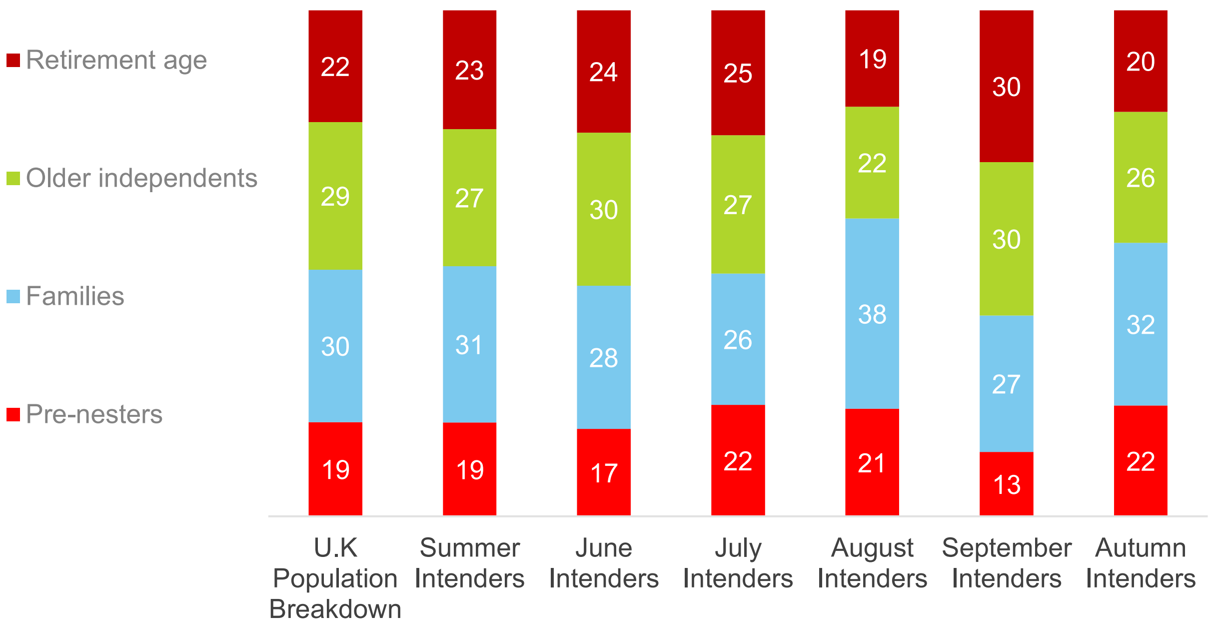
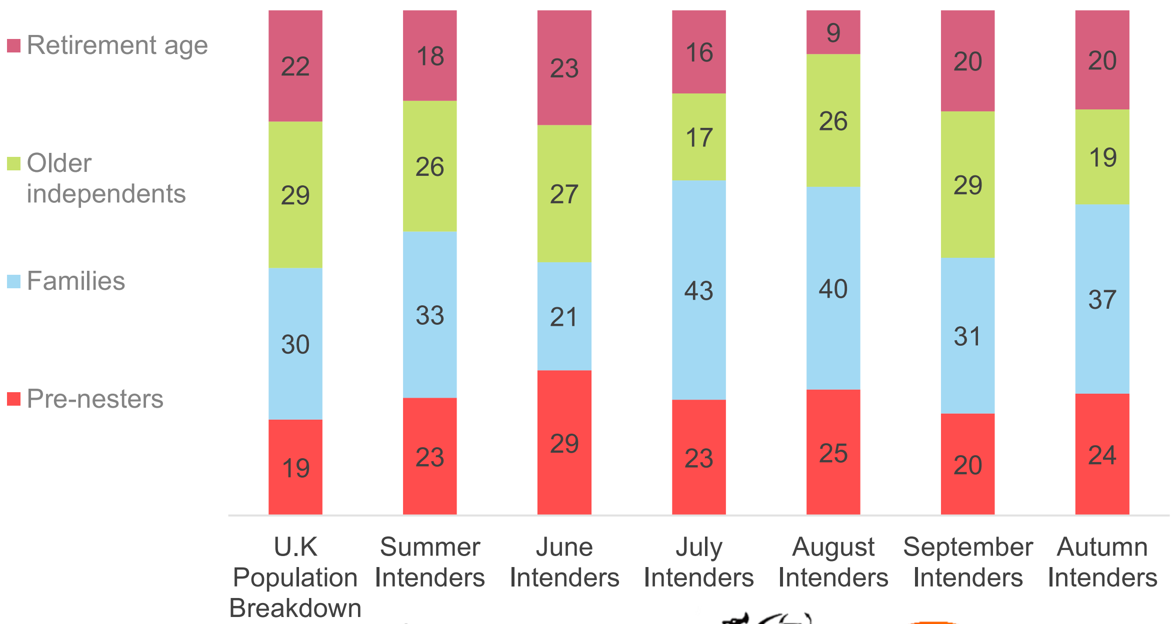


Figure 35. Breakdown of population and OVERSEAS intenders by life stage, Percentage Wave 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: UK summer intenders n=737; UK June intenders n=175; UK July intenders n=215; UK August Intenders n=291; UK September intenders n=297; UK Autumn Intenders n=465; Overseas summer intenders n=737; Overseas June intenders n=175; Overseas July intenders n=215; Overseas August Intenders n=291; Overseas September intenders n=297; Overseas Autumn Intenders n=465;

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Upcoming UK and overseas overnight trip intention

- UK residents from a high social grade are more likely to be planning on taking a domestic and overseas overnight trip than lower social grades, particularly DE social grade
- All social grades are more likely to take UK trips than overseas trips.

Figure 36. Proportion anticipating going on <u>any</u> overnight <u>UK trips</u> by social grade, Percentage, Wave 46, UK

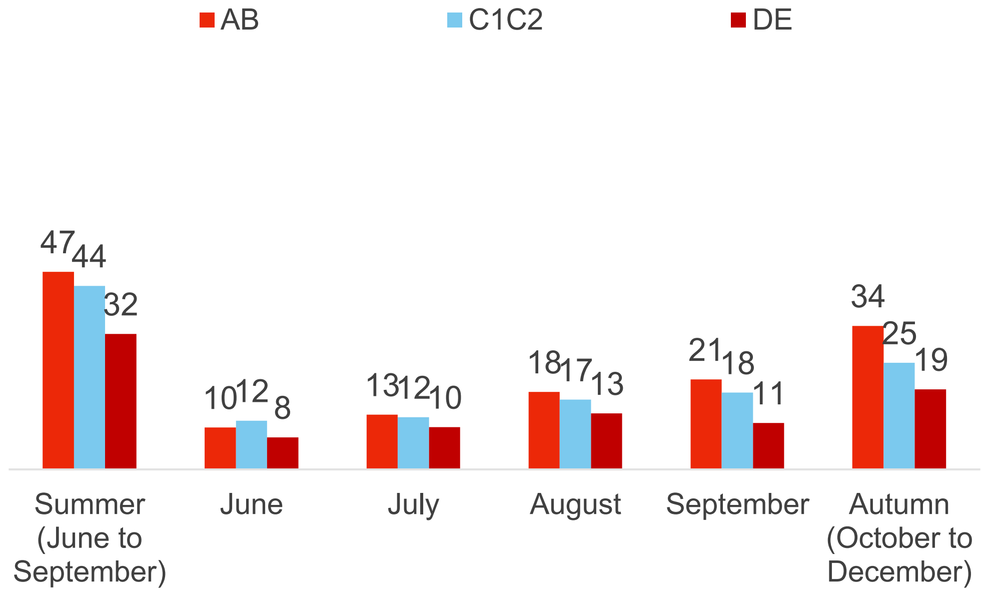
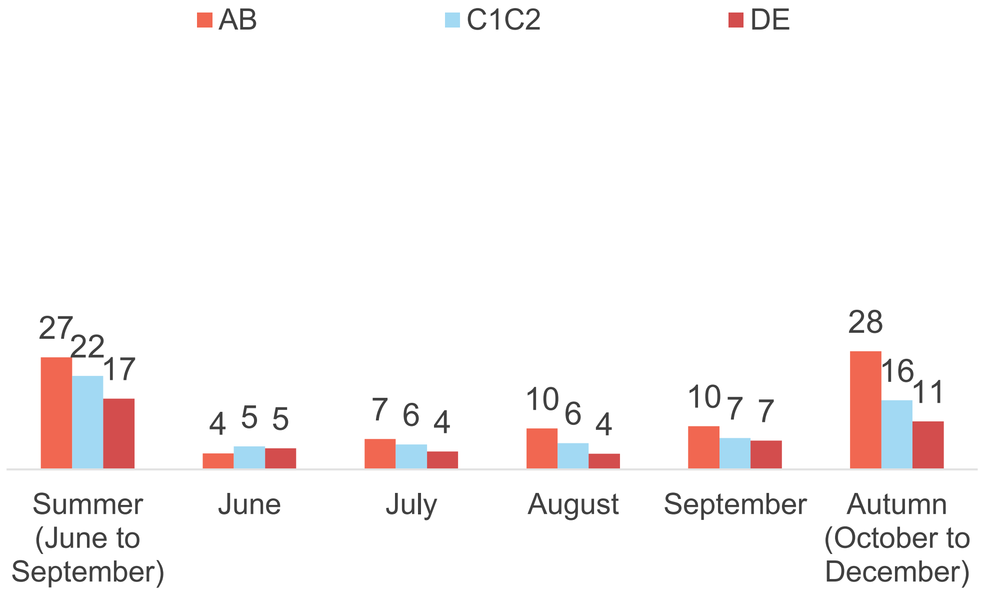


Figure 37. Proportion anticipating going on <u>any</u> overnight <u>OVERSEAS trips</u> by social grade, Percentage, Wave 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: AB social grade n=484, C1C2 social grade n=707; DE social grade n=569

Upcoming UK and overseas overnight trip intention

- Amongst UK and overseas trip intenders, social grades C1C2 make up the majority of intenders. On an overall basis, social grades AB index higher than the population for UK and overseas trip intention for summer and autumn.

Figure 38. Breakdown of population and UK intenders by Social Grade, Percentage Wave 46, UK

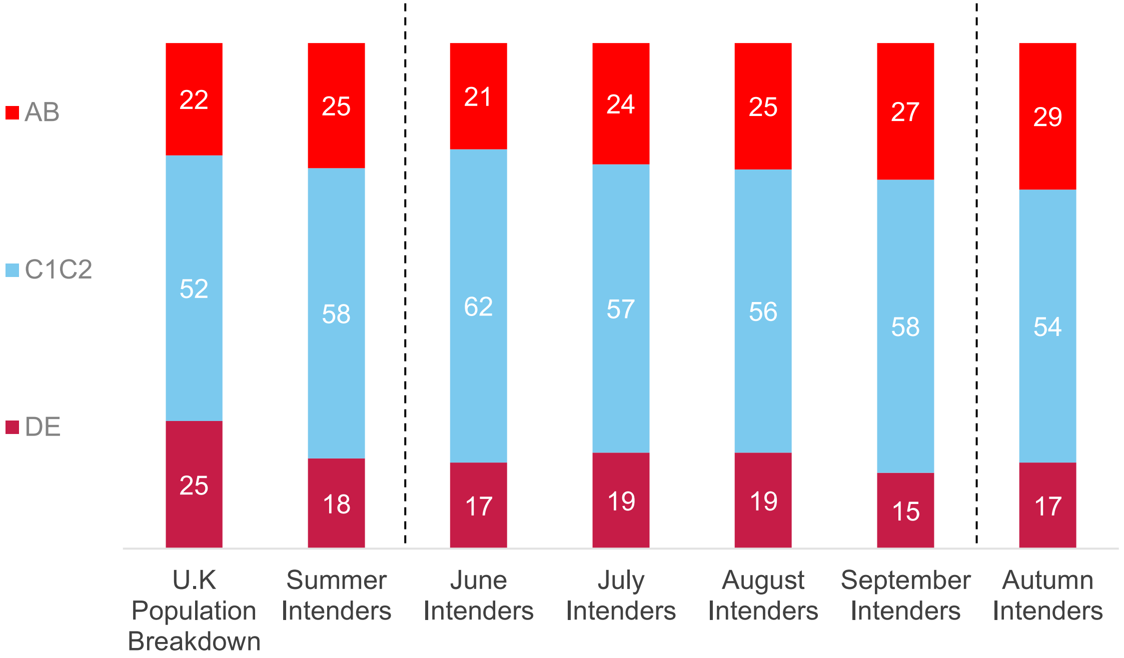
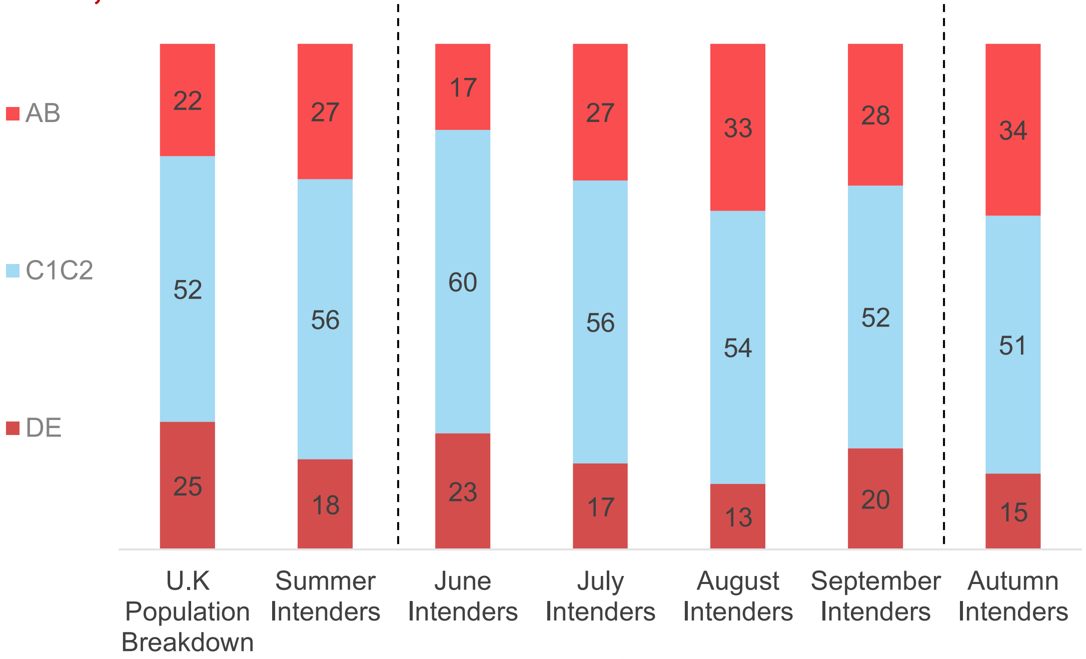


Figure 39. Breakdown of population and OVERSEAS intenders by Social Grade, Percentage Wave 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: UK summer intenders n=737; UK June intenders n=175; UK July intenders n=215; UK August Intenders n=291; UK September intenders n=297; UK Autumn Intenders n=465; Overseas summer intenders n=737; Overseas June intenders n=175; Overseas July intenders n=215; Overseas August Intenders n=291; Overseas September intenders n=297; Overseas Autumn Intenders n=465;

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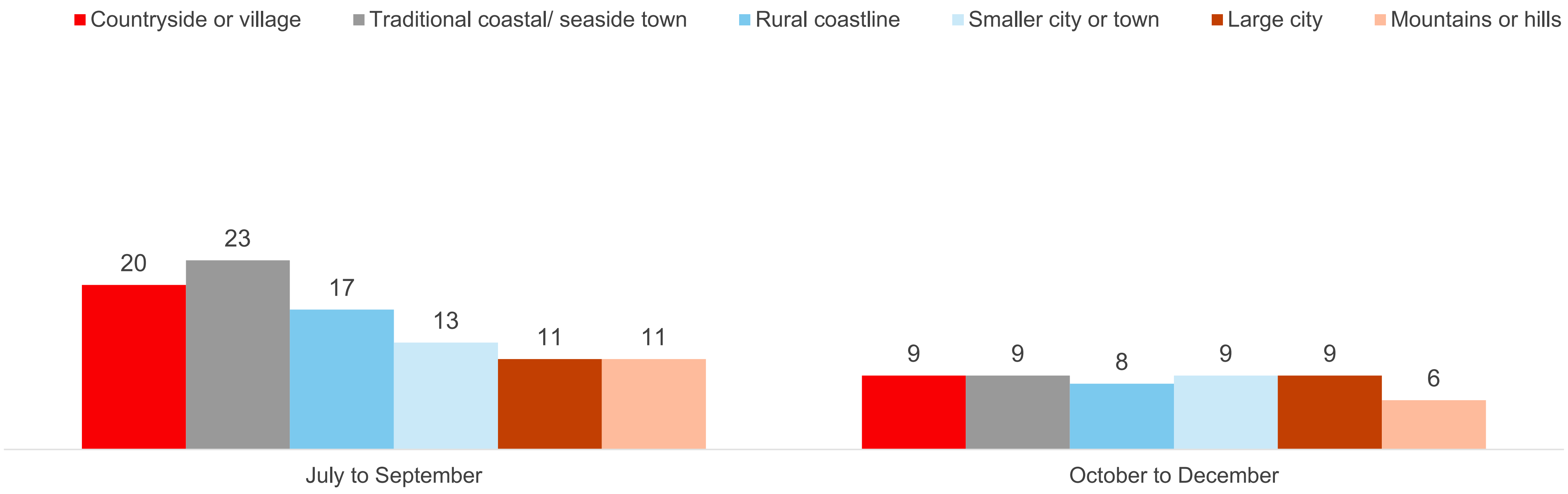
Destination type intention for UK overnight trips

- Between the summer months of July and September overnight trips to a 'traditional coastal seaside town' are the most popular, 23% of UK residents planning to take a trip to this destination type. In the Autumn months (between October and December), intention is relatively similar across each destination type.

Figure 40. Overnight trips intentions in next year by destination type, Percentage, Wave 46, UK



VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Base: All UK respondents. n=1,760
*Due to question wording, 'July to September' is used to define summer for this question Elsewhere in the report, summer is defined as June to September.

Destination type for UK trips – pre-nesters and families

- Similar to the broader population, both ‘pre-nesters’ and ‘families’ are most likely to take a trip to a ‘traditional coastal/seaside town’ this summer, followed closely by ‘countryside or village’ and ‘rural coastline’.
- Across all life stages, ‘pre-nesters’ are the most likely to plan on staying overnight in a ‘large city’ this autumn.

Figure 41. Overnight trips intentions by destination type for PRE-NESTERS, Percentage, Wave 46, UK

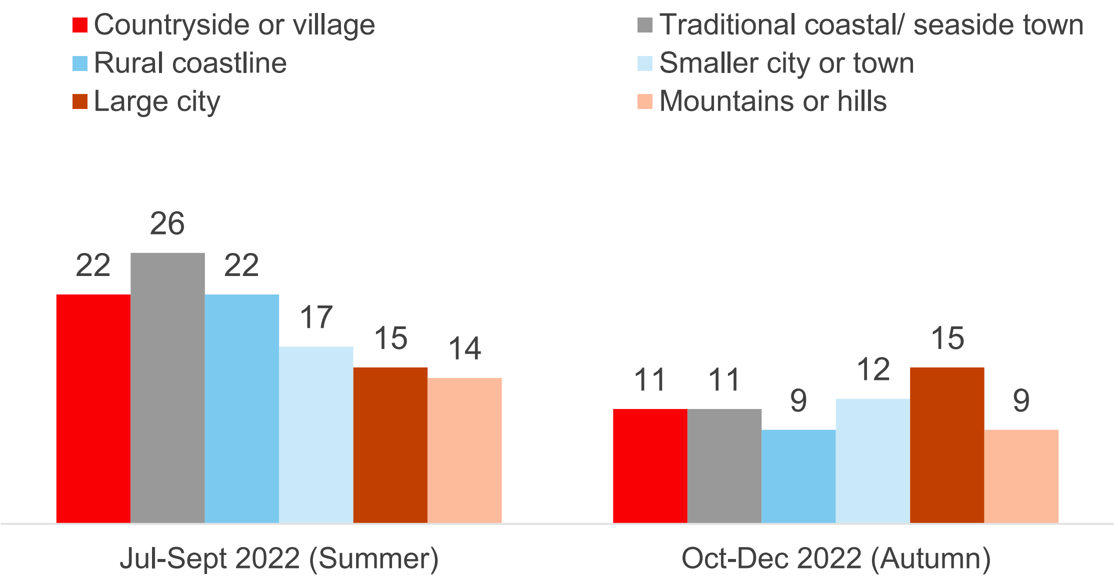
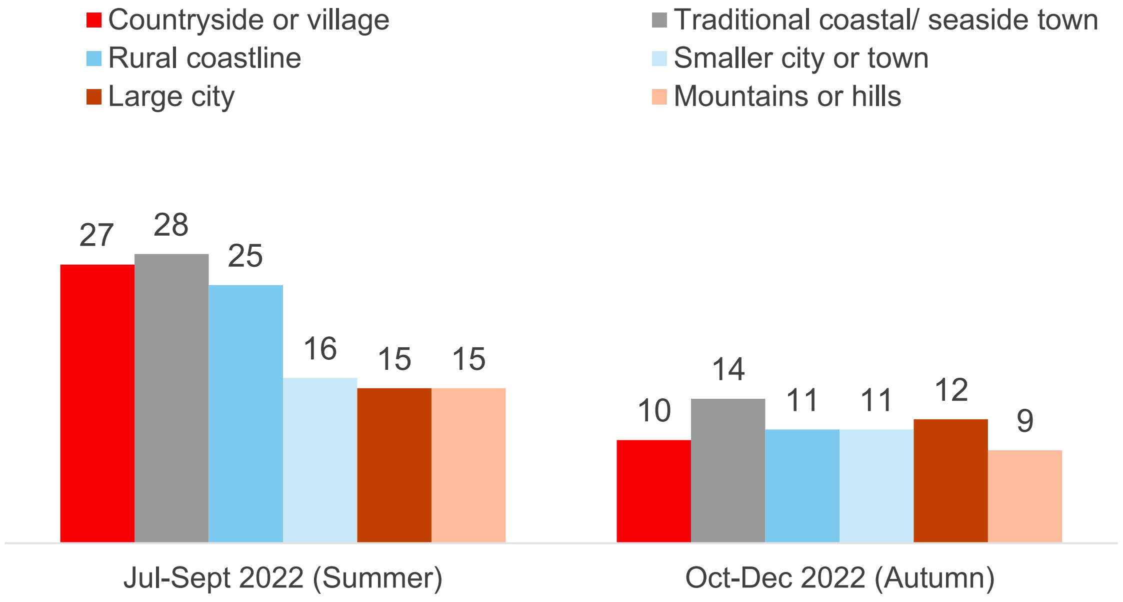


Figure 42. Overnight trips intentions by destination type for FAMILIES, Percentage, Wave 46, UK



VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Base: All UK respondents. Pre-nesters n=374; Families n=619;

*Due to question wording, ‘July to September’ is used to define summer for this question Elsewhere in the report, summer is defined as June to September.

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Destination type for UK trips – older independents and retirees

- ‘Older independents’ and ‘retirees’ are also most likely to be planning on an overnight trip in a ‘traditional coastal/seaside town’ this summer, although ‘older independents’ are equally likely to be planning on staying in the ‘countryside or a village’

Figure 43. Overnight trips intentions by destination type for OLDER INDEPENDENTS, Percentage, Wave 46, UK

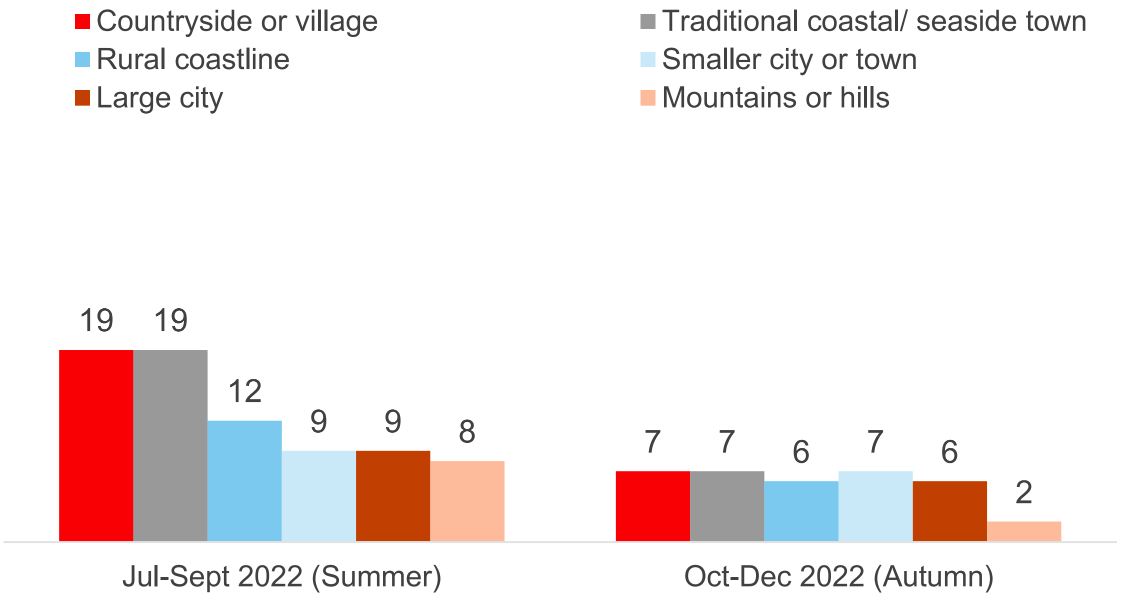
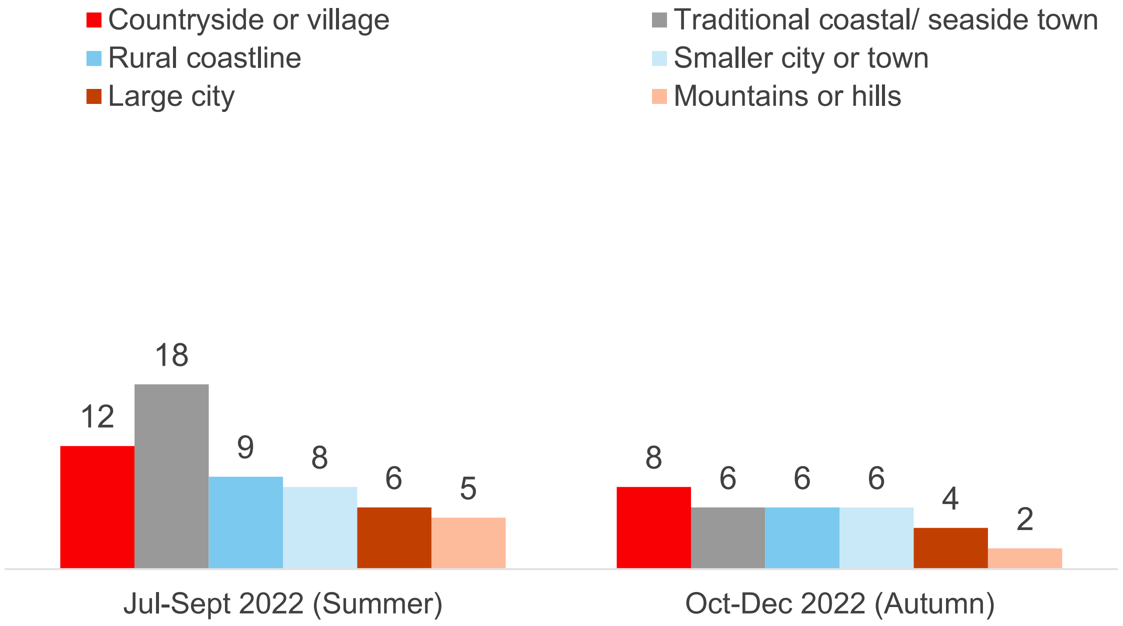


Figure 44. Overnight trips intentions by destination type for RETIREES, Percentage, Wave 46, UK



VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Base: All UK respondents; Older Independents n=448; Empty Nesters n=319

*Due to question wording, ‘July to September’ is used to define summer for this question Elsewhere in the report, summer is defined as June to September.

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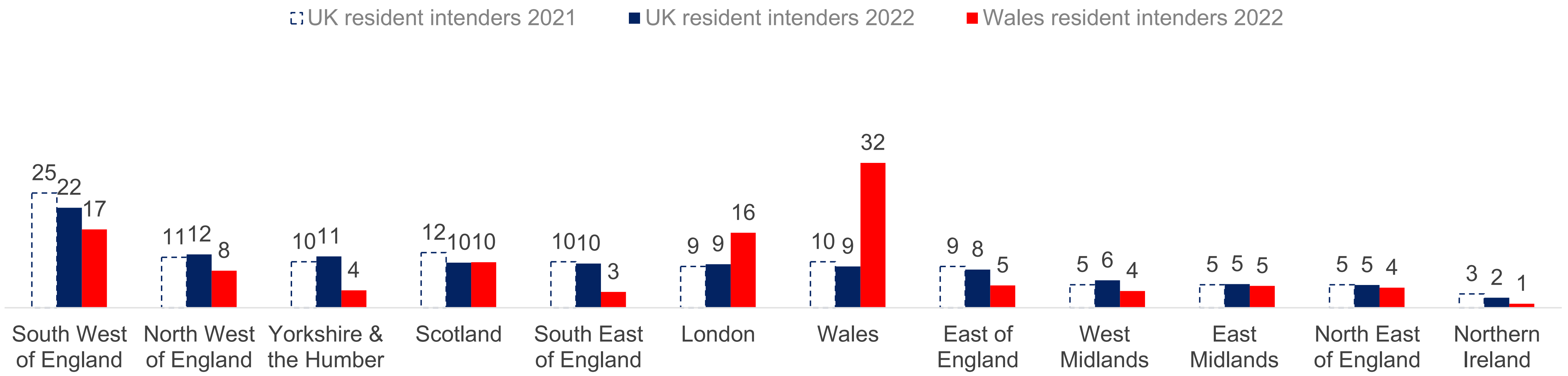
Profiling overnight trips to Wales

Where planning on staying on next UK trip in Summer 2022

- Continuing a trend since the start of this research in May 2020, the South West of England is the most popular region of the UK for an overnight short break or holiday, 22% of Summer intenders planning to go there, although intention is slightly lower than in 2021. The North West of England is the second most popular destination, followed by Yorkshire and the Humber. Wales is the joint 6th most popular region at 9%. Although this represents a slight drop on 2021 intention, in absolute terms it represents a slight rise (overall UK summer trip intention higher overall).
- 32% of Wales-based intenders are planning on taking an overnight trip in Wales this Summer.

Figure 45. Where planning on staying on next UK overnight trip in Summer (June to September), Percentage, Waves 44-46, Proportion of UK and Wales-based Intenders



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Summer UK Intenders n=1,752, Wales Resident Intenders n=197

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Intention to visit Wales by region of residence

- Intention to take an overnight holiday/short break in Wales is highest among Wales residents, with a third (32%) planning a summer trip. However, this has decreased from trip intention levels in 2021, when 4 in 10 Wales residents were planning to take a summer trip in Wales.
- The vast majority of Wales intenders live elsewhere in the UK. After Wales, those most likely to intend to visit are residents of the North West of England and the West Midlands.

Figure 46. Intention to take a summer trip to Wales by region of residence, Percentage of intenders, Waves 44-46, UK intenders

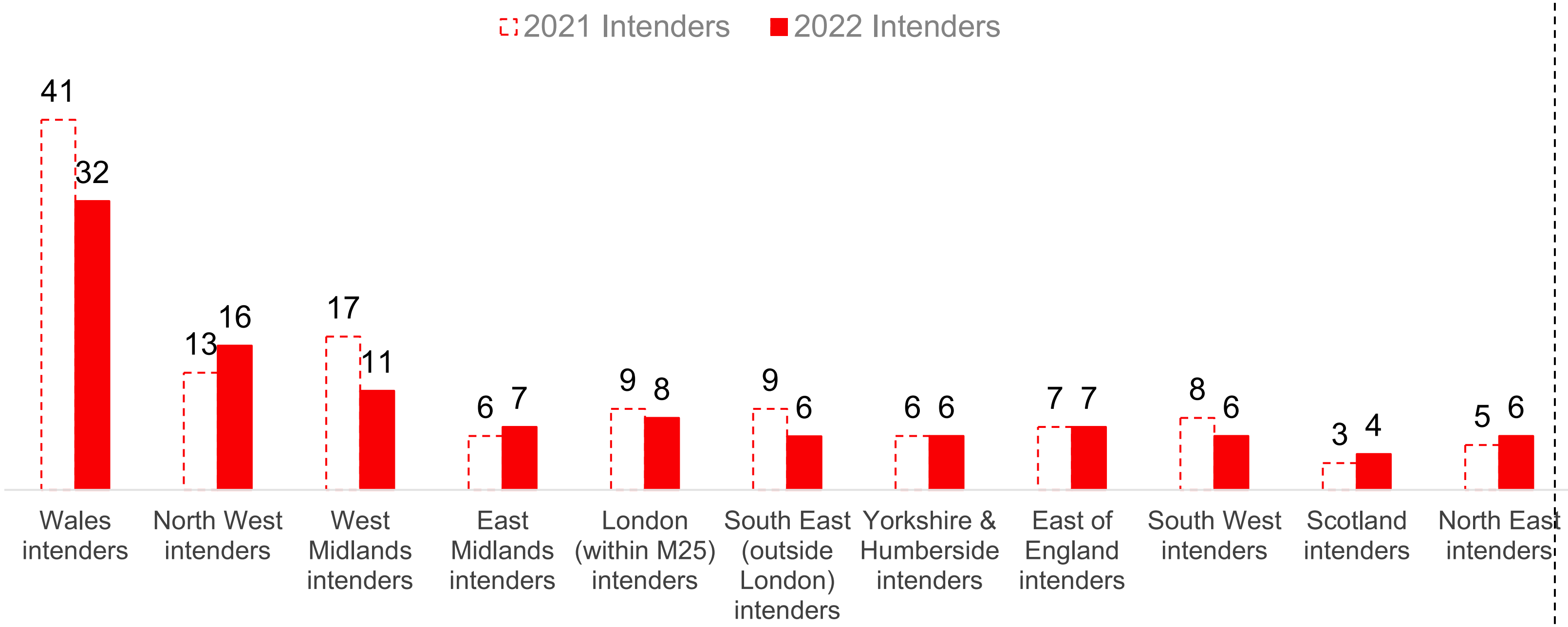
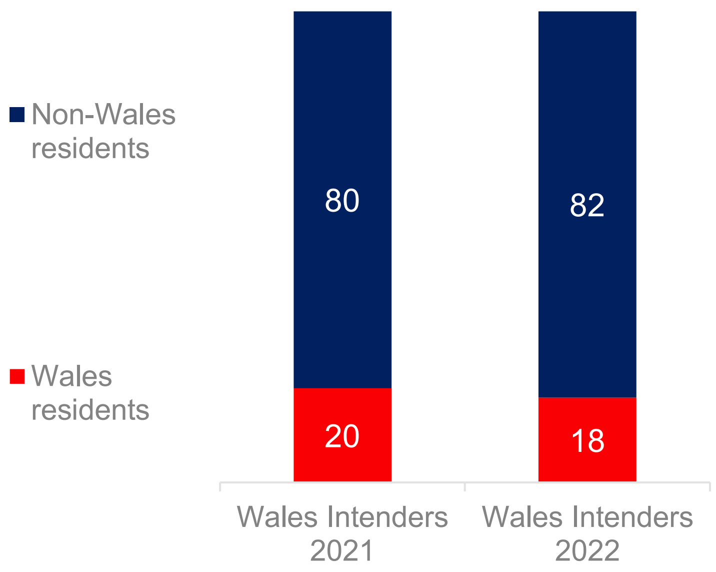


Figure 47. Breakdown of Wales intenders by region of residence, Percentage, Waves 44-46, UK



QVB4a. Where in the UK 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 UK this summers. Residents in each region Wales n=197; North West n=184; South West n=112; London n=162; West Midlands n=164; North East n=66; Yorkshire and The Humber n=140; East Midlands n=111; East of England n=122; South East n=205; Scotland n=263; Wales summer intenders n=181

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Top 3 destinations for regions with highest intention to visit Wales

- In Summer, Wales is a 'top 3 destination choice' for intenders from Wales, North West of England and the West Midlands.

Table 1. Top 3 Destinations for Summer Intenders by regions most likely to visit Wales, Waves 44-46, UK intenders, Top 5 regions intending to visit Wales

Rank	Wales Resident Intenders	North West Resident Intenders	West Midlands Resident Intenders	London Resident Intenders	East of England Resident Intenders
1st choice	**Wales (32%)**	North West (24%)	South West (30%)	South West (26%)	East of England (27%)
2nd choice	South West (17%)	**Wales (16%)**	West Midlands (16%)	South East (15%)	South West (26%)
3rd choice	London (16%)	South West (16%)	**Wales (11%)** London (11%)	London (12%)	South East (11%)

QVB4a. Where in the UK 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 UK this summers. Residents in each region Wales n=197; North West n=184; West Midlands n=164; East of England n=122; London n=162

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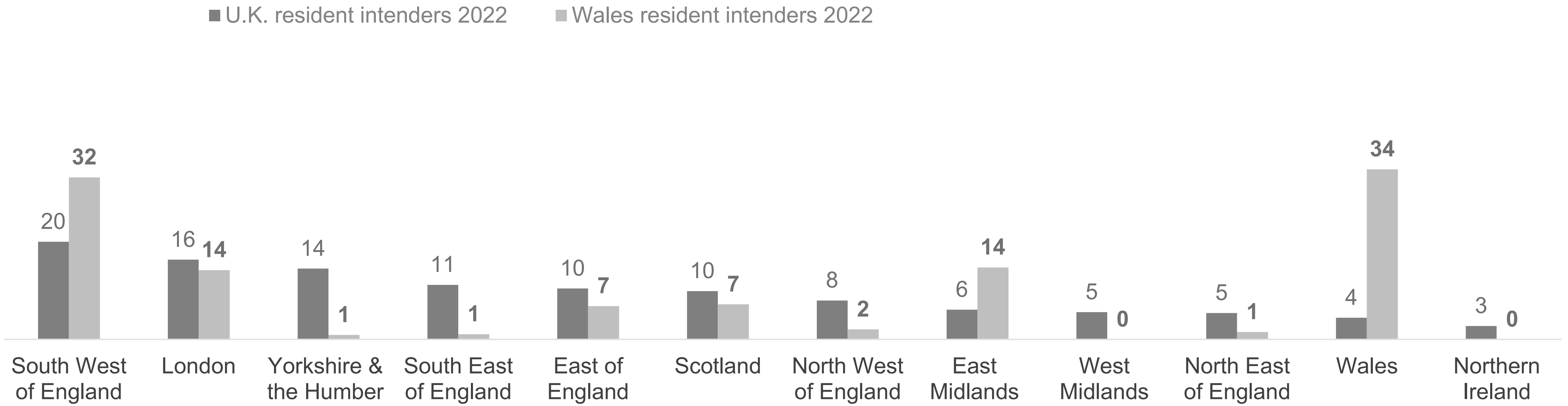
Where planning on staying on next UK trip in autumn 2022

- The South West of England is also the most preferred destination for autumn trips, although less dominant than in the summer, only 4 percentage points ahead of London, the second most preferred.
- 4% of UK autumn intenders plan on taking an overnight trip to Wales, 34% for Wales residents autumn intenders*.

Figure 48. Where planning on staying on next UK overnight trip in Autumn (October to December), Percentage, Waves 44-46, UK and Wales-based intenders



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Summer UK Intenders n=447, Wales Resident Intenders n=38* *Caution: Low base sizes
*The question is based on 'next trip', and so does not count anyone who is intending to take a trip before the autumn as well as during autumn. Results should therefore be treated with caution.

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Demographics of Wales intenders compared to general population

- As in 2021, families are the largest life stage amongst Wales summer intenders, at around 2 in 5 and rising to over half in July and nearly 3 in 5 in August. Although retirees have lower representation than amongst the population across both summer and autumn, they make up 28% of Wales intenders in September, above their fall-out in the population.
- The majority of all intender groups belong to social grades C1C2, and all have higher representation amongst social grades AB than the general population.

Figure 49. Breakdown of population and intenders by life stage, Percentage Waves 44-46, UK

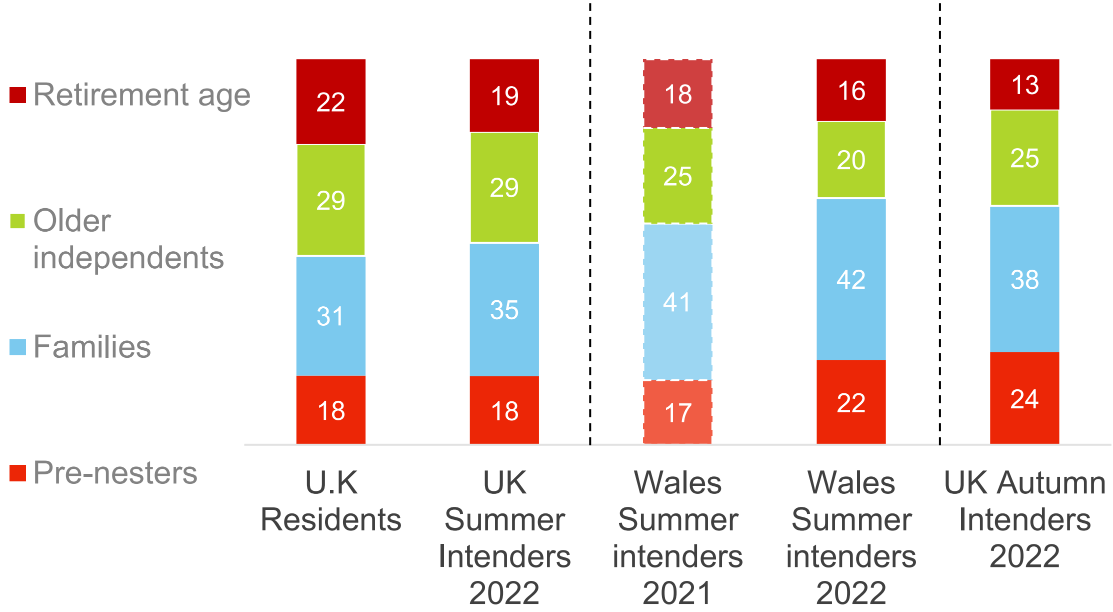
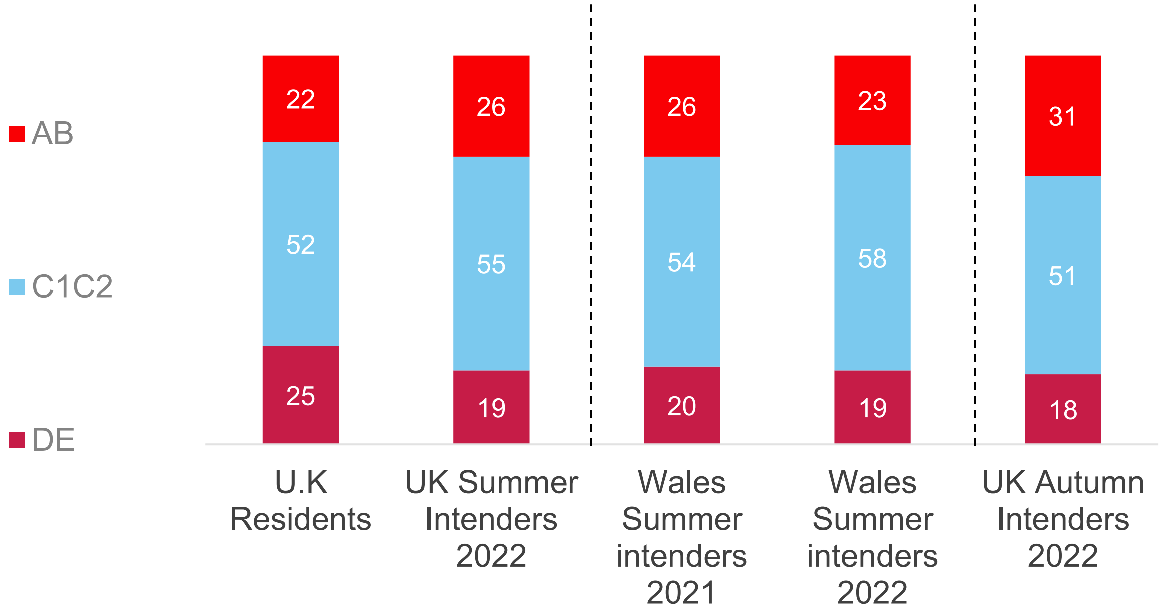


Figure 50. Breakdown of population and intenders by social grade, Percentage Waves 44-46, UK

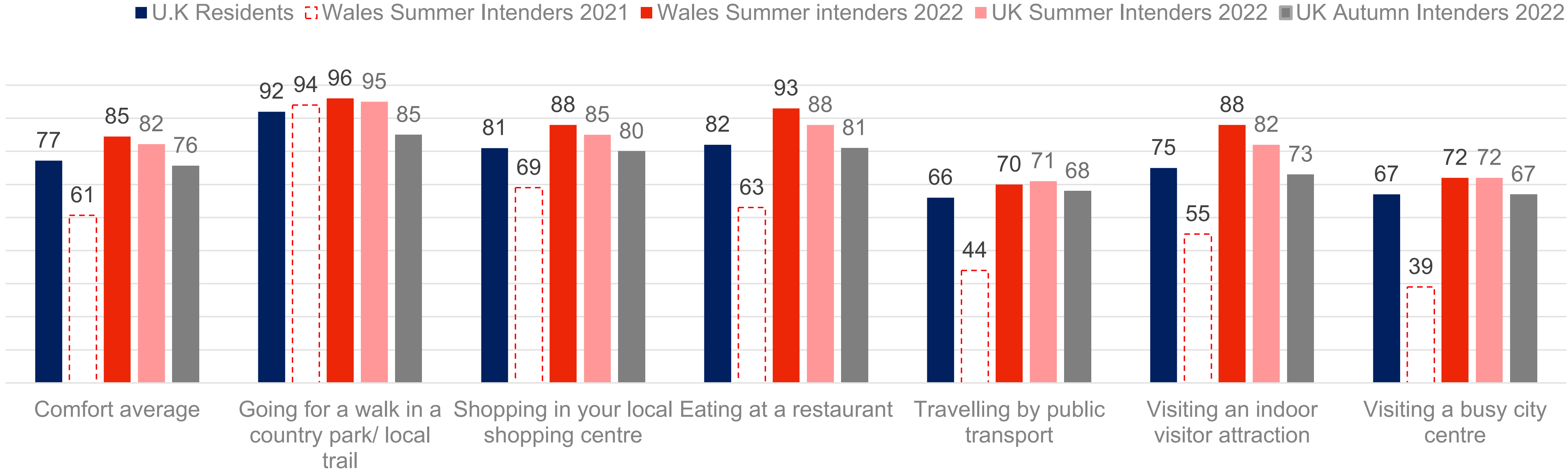


Source: Demographics. Base: All respondents. UK population n=5,274; Wales Summer intenders n=181; UK summer intenders n=1,752; UK Autumn Intenders n=447

Level of comfort undertaking activities amongst Wales intenders

- Like UK summer intenders, Wales summer 2022 intenders are significantly more comfortable with undertaking everyday activities than the general population and than Wales *summer 2021* intenders.
- UK autumn intenders exhibit lower comfort levels, suggesting that lower comfort levels may mean they are opting to take their next UK trip later in the year.

Figure 51. Level of comfort conducting activities by intenders, Net very and fairly comfortable, Percent, Wave 46, UK

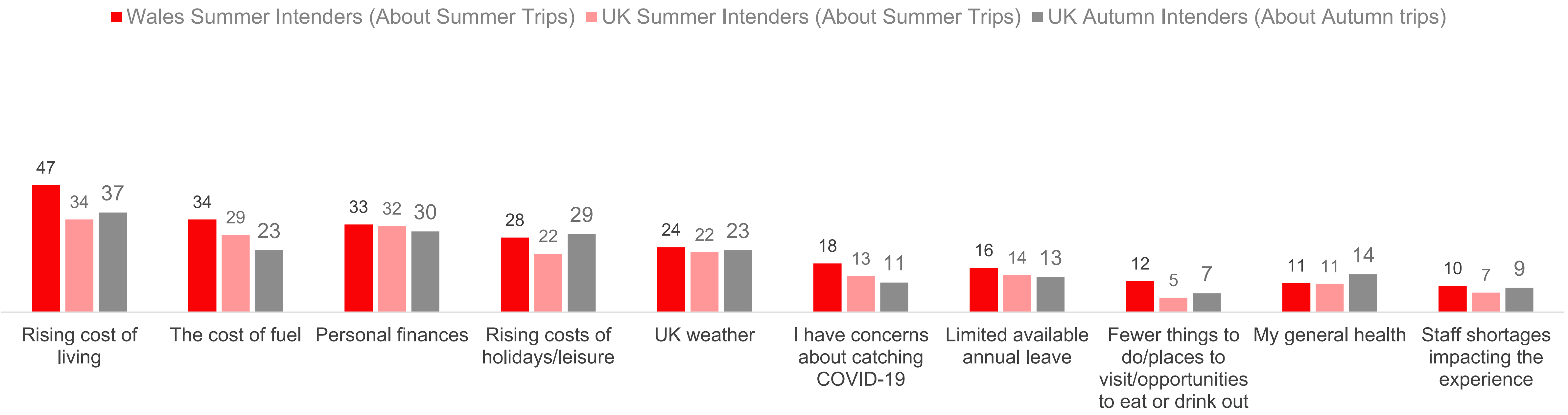


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: All respondents. UK population n=5,274; Wales Summer intenders n=181; UK summer intenders n=1,752; UK Autumn Intenders n=447

Perceived barriers to taking UK/overseas holidays and short breaks

- Wales summer intenders are more likely than UK summer intenders to see financial factors as potential barriers to taking summer trips this year – nearly half (47%) citing ‘rising cost of living’ (compared to 34% of UK intenders), and about a third either ‘the cost of fuel’ (34% compared to 29% of UK intenders) and ‘personal finances’ (33% compared 32% of UK intenders).
- Barriers amongst UK autumn intenders are broadly similar to summer barriers.

Figure 52. Barriers to taking an overnight UK trip, Percentage, Waves 45 to 46, UK and Wales, Top 10

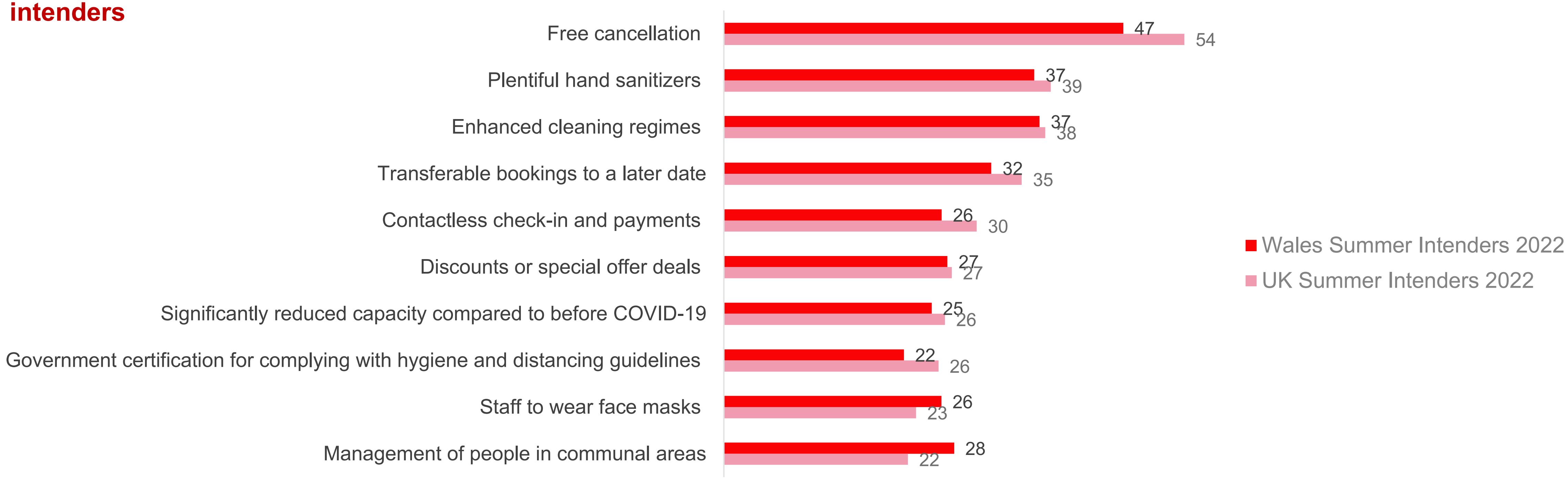


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: December and January fieldwork to boost base sizes. Figure 11. Wales summer intenders n=78; UK Summer Intenders n=796; UK Autumn Intenders n=223

Conditions essential for tourism/leisure providers to have in place

- Aligned with their higher concerns around finances, Wales summer intenders are more likely than UK summer intenders to consider ‘free cancellation’ as an essential condition to visit an indoor tourism/leisure provider.

Figure 52b. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, Wave 46, UK and Wales, Top 10 amongst Wales intenders



Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months?
Base: Wales Summer intenders n=181; UK summer intenders n=1,752; UK Autumn Intenders n=447

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Financial segments and financial concerns amongst Wales intenders

- Wales summer intenders in 2022, are more likely than Wales 2021 intenders to describe themselves as 'having to be careful financially' and less likely as being 'better off than before the pandemic'.
- The vast majority of both UK and Wales 2022 intenders describe themselves as concerned about 'rising living costs/inflation', with concerns also high about a 'a potential recession' and 'tax increases'. Wales summer intenders are more concerned than the UK population about a potential recession and marginally higher concerns about other economic impacts.

Figure 53. Breakdown of intenders by financial segments, Percentage, Waves 44-46, UK

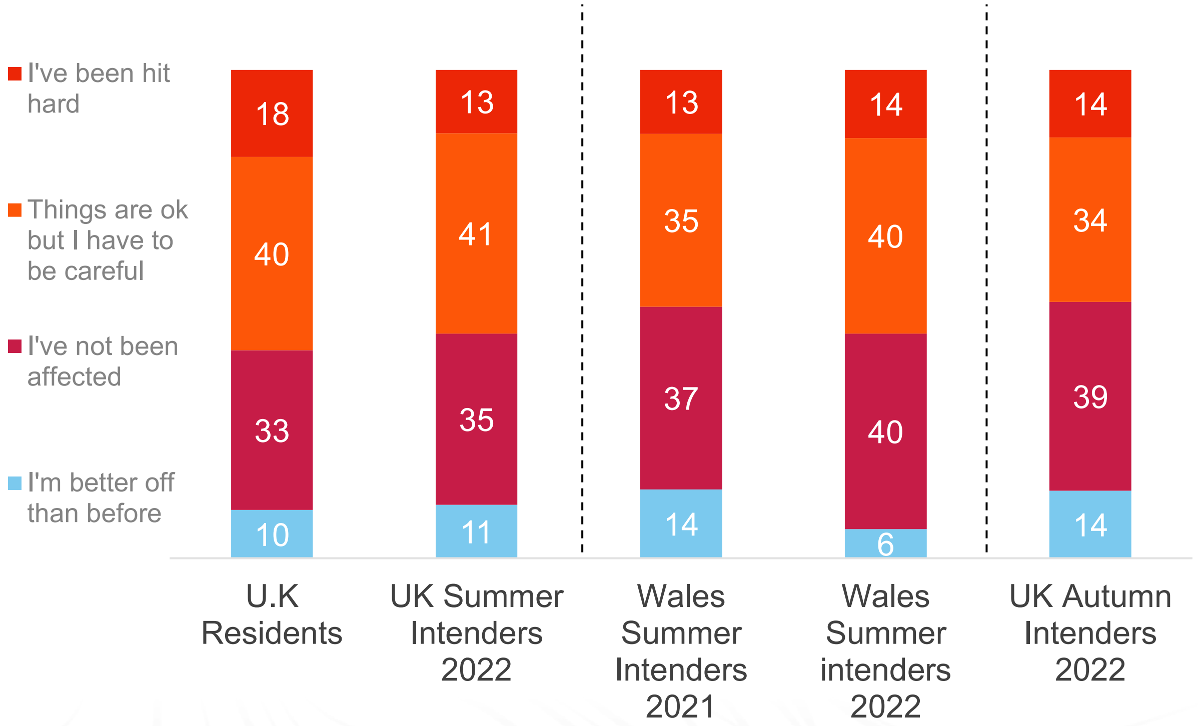
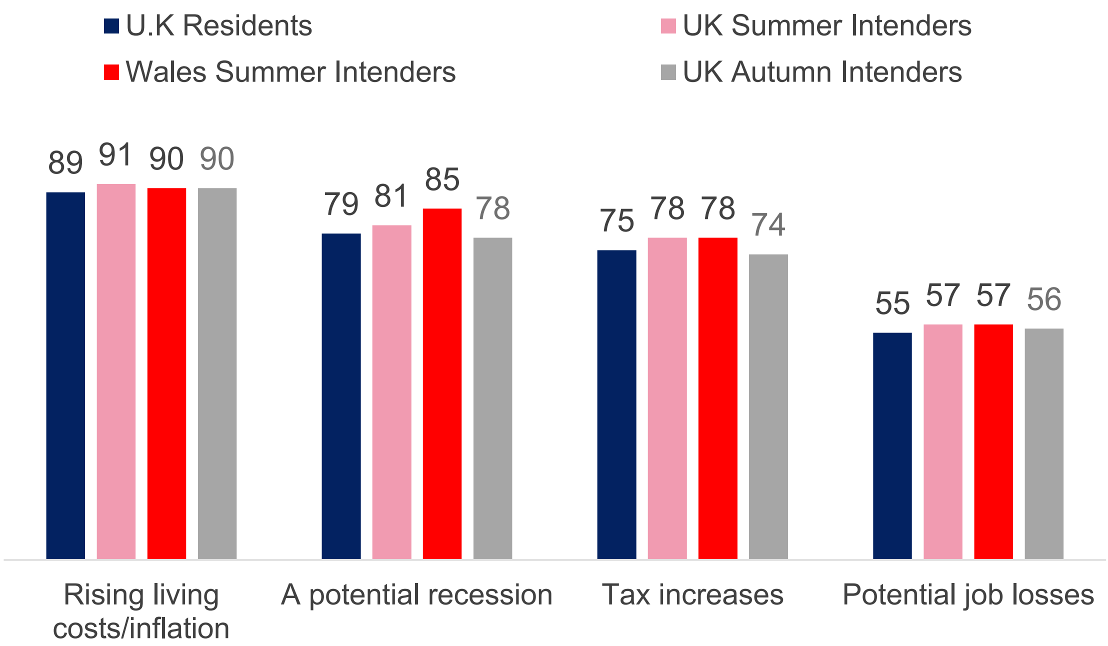


Figure 54. Concerns around economic factors by Wales intenders, Percentage, Wave 46, UK



Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Q18d How worried if at all, are you about the following and their impact on your personal finances? Base: All respondents. UK population n=5,274; Wales Summer intenders n=181; UK summer intenders n=1,752; UK Autumn Intenders n=447

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Booking status of trips amongst Wales intenders

- 44% of Wales summer 2022 intenders have already planned *and* booked their summer 2022 trip, higher than UK summer intenders and the proportion of Wales summer intenders that had done so in the equivalent period in 2021.
- In contrast with 2021, and in line with patterns earlier in the year, booking patterns appear to be broadly in line with normal, with intenders equally as likely to book closer to the date as further away.
- Overseas booking patterns are also consistent with pre-pandemic behaviour.

Figure 55. Breakdown of intenders by booking status, Percentage, Waves 30 and 46, UK

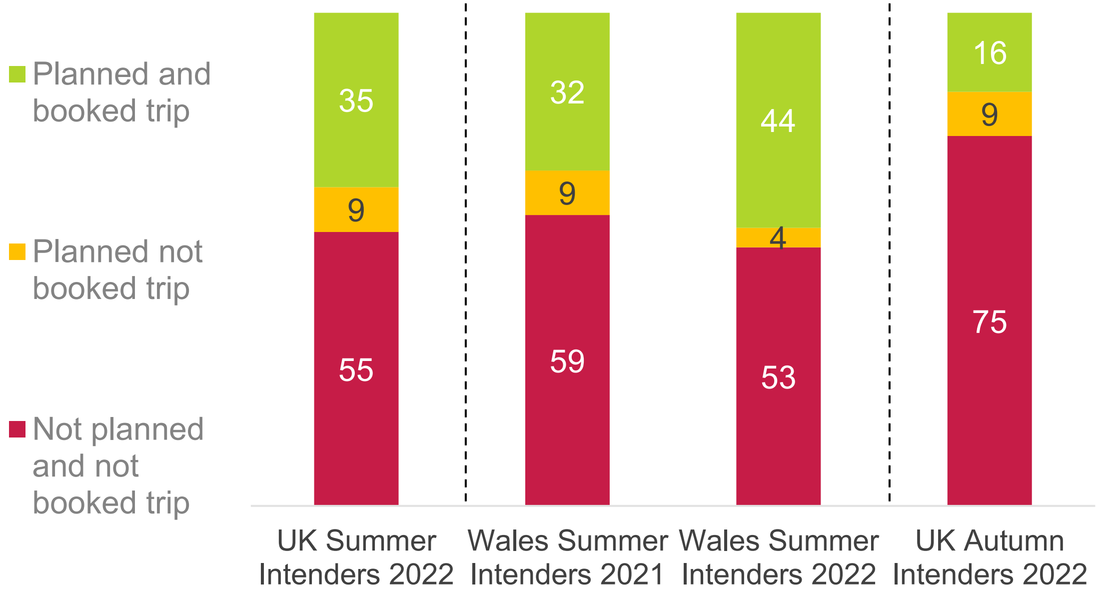
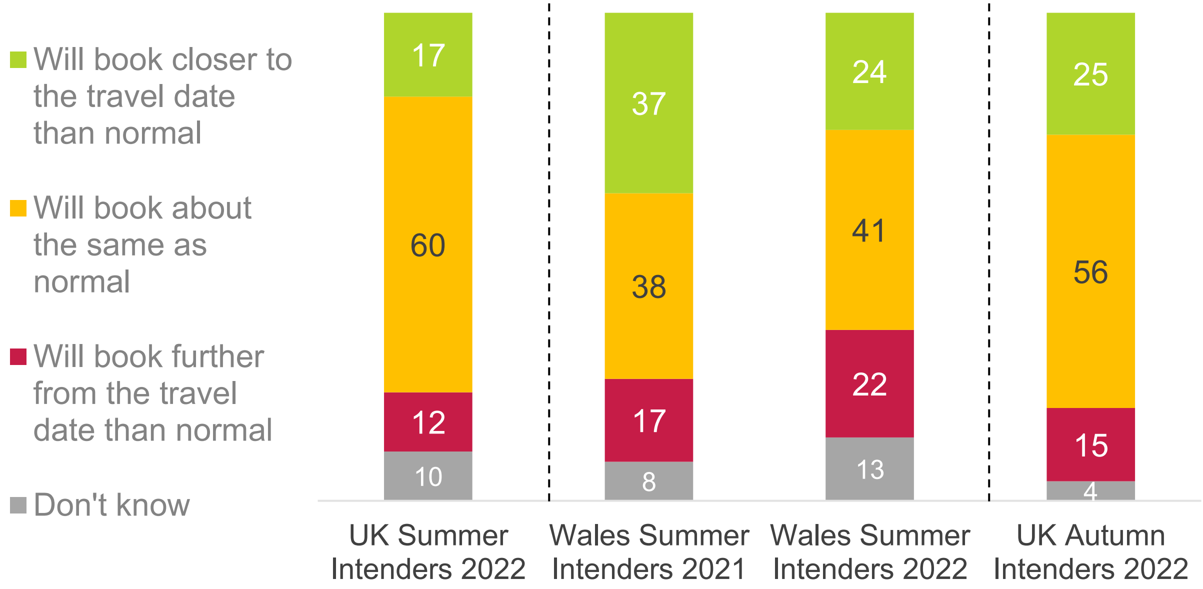


Figure 56. Breakdown of intenders by booking habits, Percentage, Waves 30 and 46, UK



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2g. Compared to before the pandemic, when are you likely to book your next OVERSEAS trip in <INSERT MONTH FROM VB2AIII>?
Base: Wales Summer intenders n=65; UK summer intenders n=647; UK Autumn Intenders n=176

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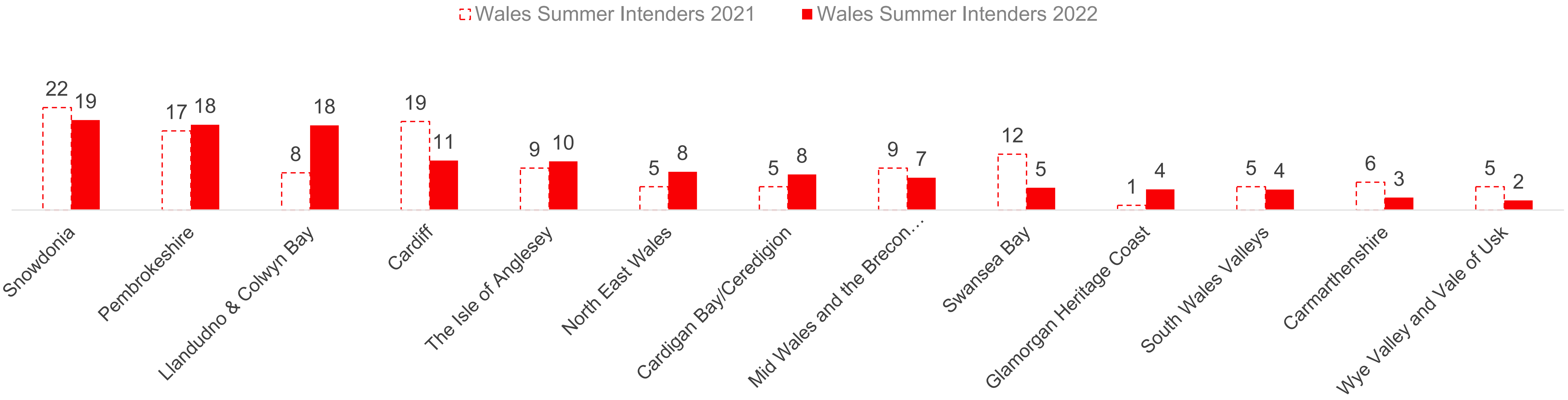
Overnight trip behaviour

Planned destination in Wales amongst Wales intenders

- Consistent with 2021, Snowdonia is the number one intended destination for an overnight trip in Wales this summer (particularly high in June and September), followed closely by Pembrokeshire and Llandudno & Colwyn Bay (highest in August).
- Compared to 2021, there is a higher incidence of interest in Llandudno and Colwyn Bay, and lower interest in Cardiff and Swansea Bay, driven by the different balance of origin in intenders (e.g. more living in the North West of England and fewer in the South East of England).

Figure 57. Planned destination for next Summer Wales trip, Percentage Waves 44-46, UK and Wales



QVB4viii. Where in Wales do you expect to be staying on this next holiday or short break?
Base: Wales Summer intenders n=181

Type of destination for next Wales short break or holiday

- Wales Summer Intenders are most likely to be planning on staying in a 'traditional seaside town' (39%), in particular in August (at 62%). 'Rural coastline' (33%) is the second most preferred summer destination type for Wales intenders, followed by 'countryside or village' (at 24%). 'Countryside or village' is less preferred than in 2021 and than amongst UK intenders, although is the leading destination type in September (at 52%).
- In the Autumn, city or large town is the leading UK destination type.

Figure 58. Main type of destination for Summer intenders, Percentage Waves 44-46, UK

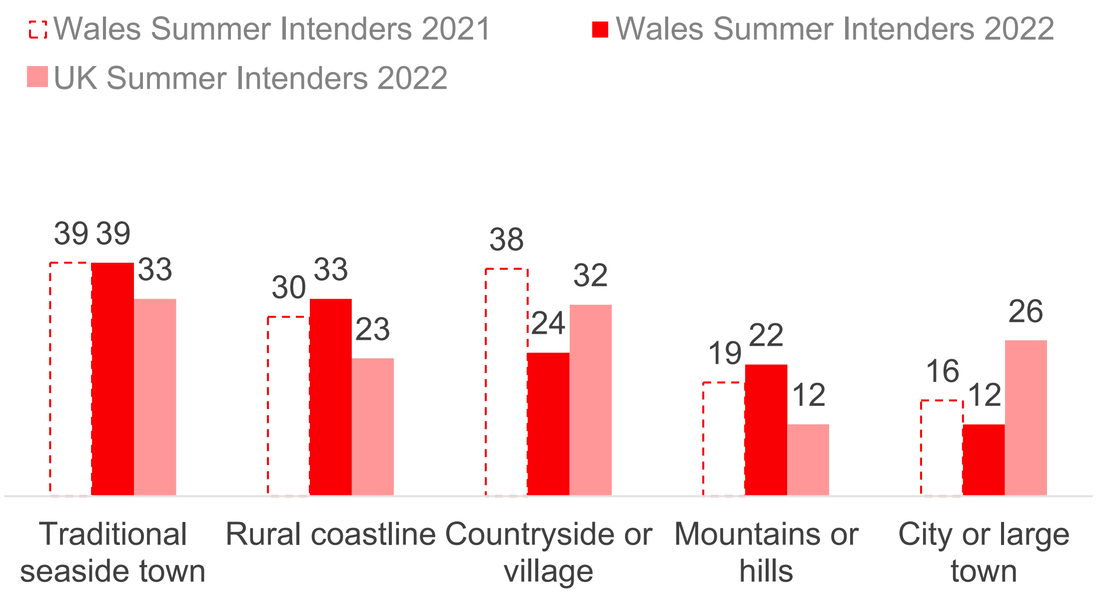
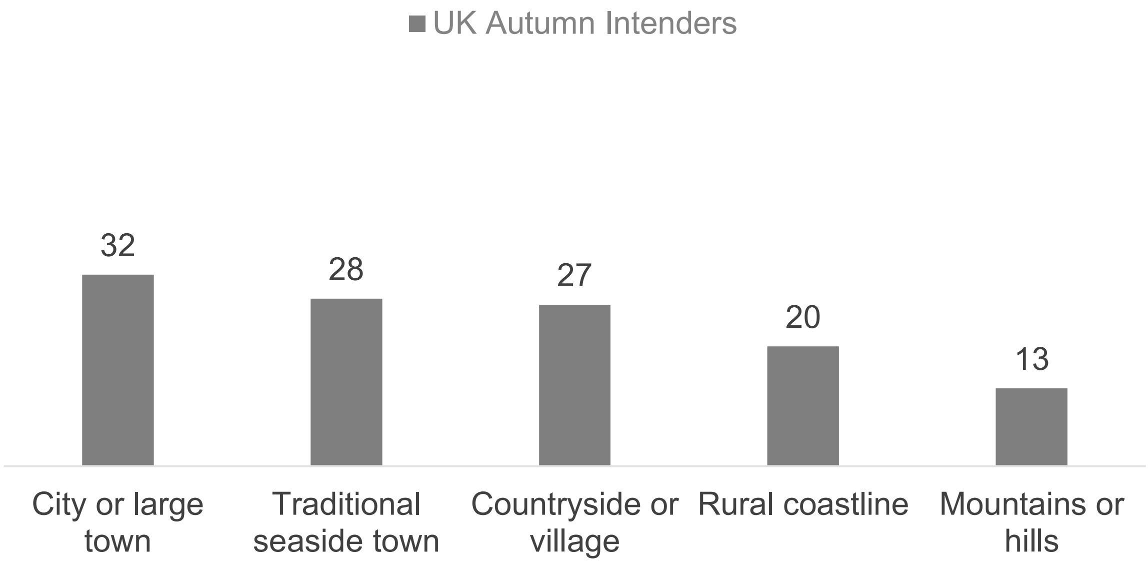


Figure 59. Main type of destination for Autumn intenders, Percentage Waves 44-46, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447

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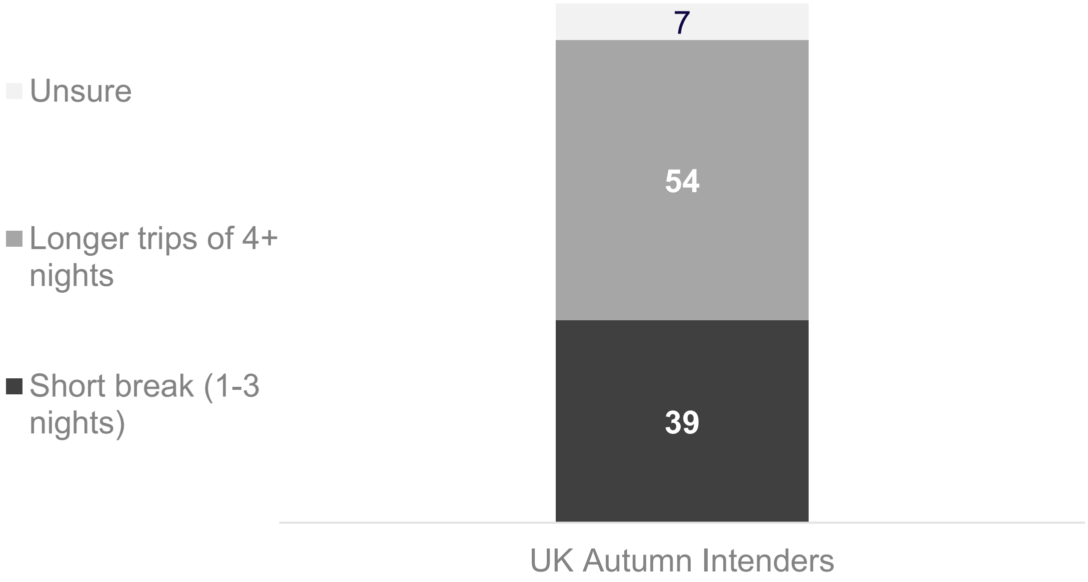
Trip length amongst Wales trip intenders

- Two thirds of Wales summer 2022 intenders are planning on a longer trip of 4+ nights, significantly higher than UK intenders (55%), and the 45% that planned a longer Wales overnight trip in 2021.
- Longer trips also dominate UK autumn intention.

Figure 60. Length of next Summer trip, Percentage, Waves 44-46, UK

Figure 61. Length of next Autumn trip, Percentage, Waves 44-46, UK



VB3. Is this next trip in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447

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

- Amongst Wales summer intenders, a 'partner' is the most common accompanying party member for a trip (at 65%), followed by 'child, grandchild or young adults with parents' (at 44% and rising to 60% in August). Wales summer 2022 intenders are more likely than UK summer 2022 intenders to be taking their trip with children or young adults, and compared to summer 2021, are less likely to be travelling with friends.
- Partner is also the most likely visitor party type for UK autumn intenders.

Figure 62. Visitor party make-up for Summer intenders, Percentage Waves 44-46, UK

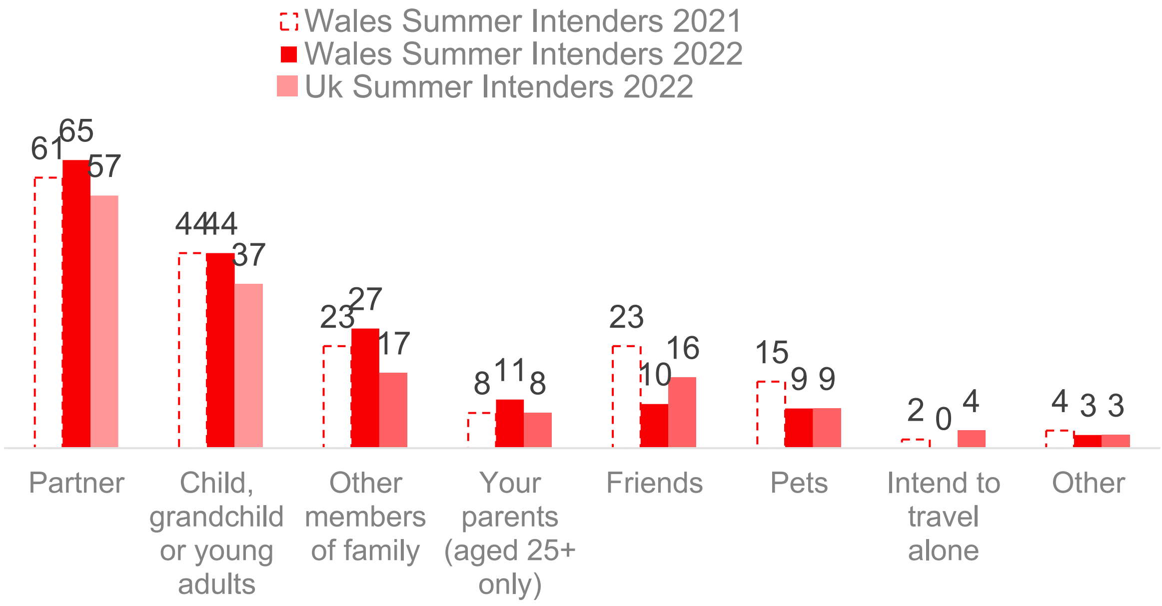
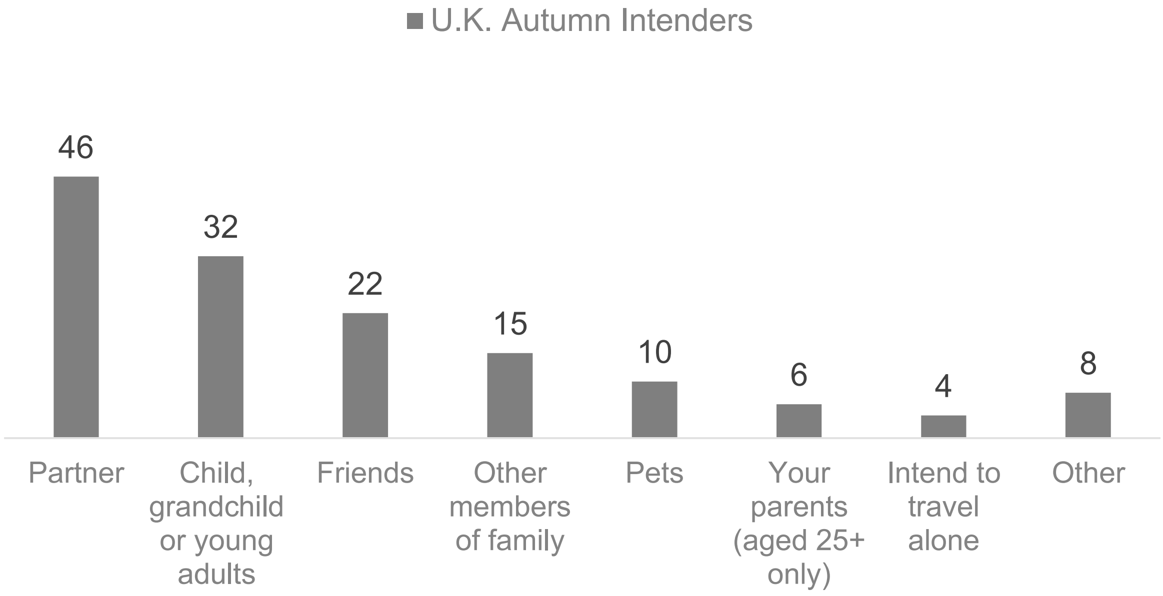


Figure 63. Visitor party make-up for Autumn intenders, Percentage Waves 44-46, UK



QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447 *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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Trip purpose/s for next UK short break or holiday

- For the vast majority of Wales summer intenders, 'holiday/leisure' is the purpose of their trip. 'Visiting friends or relatives' is a purpose for 1 in 5. Consistent with previous waves, Wales intenders are more likely than UK intenders to be travelling for a holiday/leisure purpose.
- Holiday/leisure is also the leading purpose for Autumn trips, although 1 in 3 are planning a trip to visit friends or relatives.

Figure 64. Overnight trip purpose for Summer intenders, Percentage Waves 44-46, UK

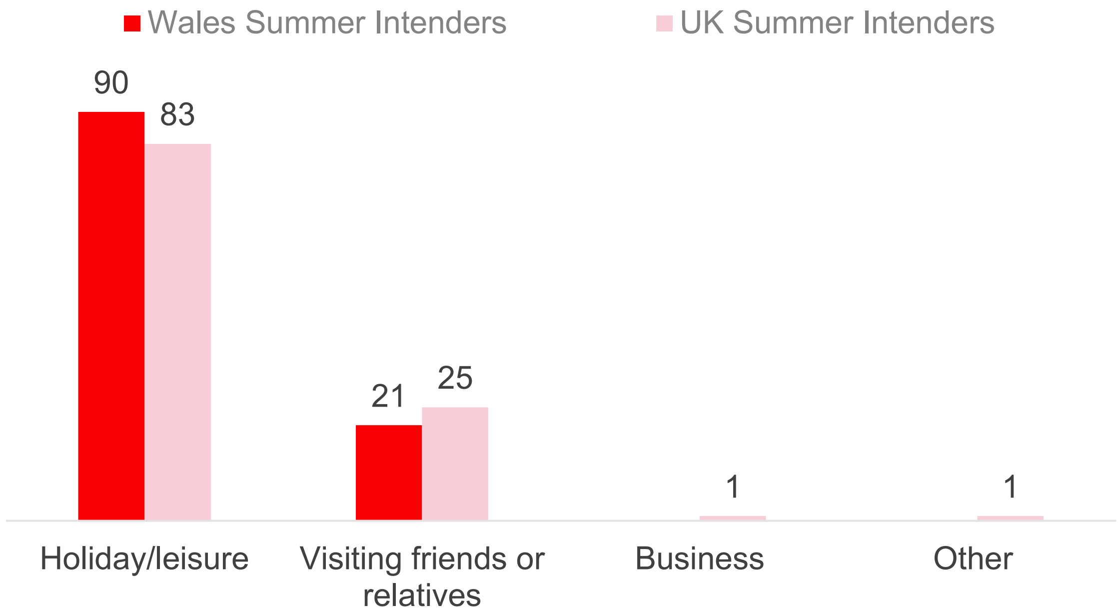
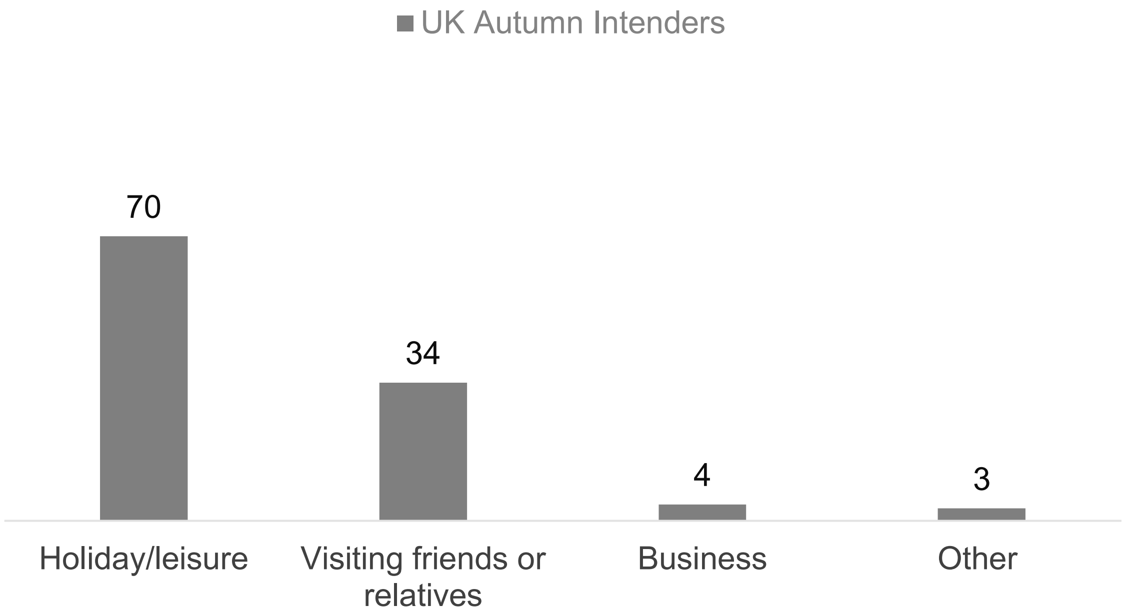


Figure 65. Overnight trip purpose for Autumn intenders, Percentage Waves 44-46, UK



VB6f. And which of the following best describes the purpose/s of this trip? Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447

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Type of accommodation for next Wales short break or holiday

- 'Caravan/camping' is the leading accommodation choice for Wales summer 2022 intenders (at 36%), followed by 'commercial self-catering' (32%) and 'hotel/motel/inn' (25%). Compared to UK summer intenders, Wales summer intenders are less likely to be staying in a 'hotel/motel/inn', 'a private home' and a 'guesthouse/B&B/farm house'.
- It's worth noting that differences in accommodation intention is in part driven by whether intenders have booked their trip (all categories tending to be higher when fewer people have already booked), which will in part explain why Wales summer 2021 and UK summer 2022 intenders index higher than Wales summer 2022 intenders for the majority of categories.

Figure 66. Accommodation categories planning on staying in on next UK overnight trip for Summer intenders, Net percentage Waves 44-46, UK

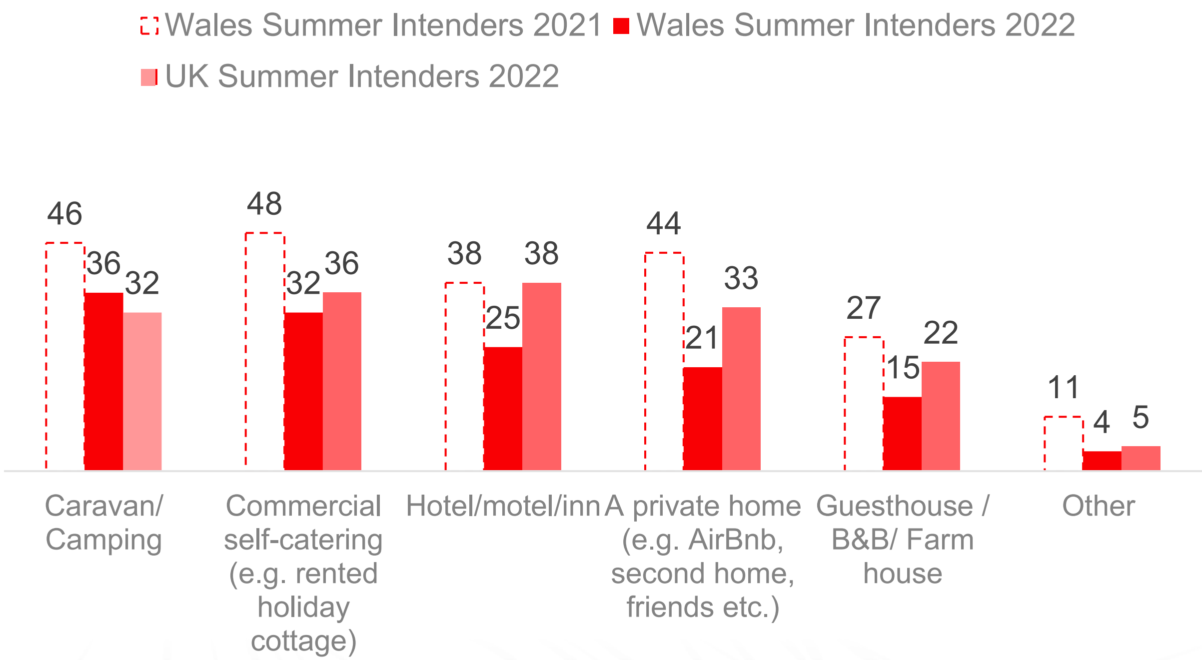
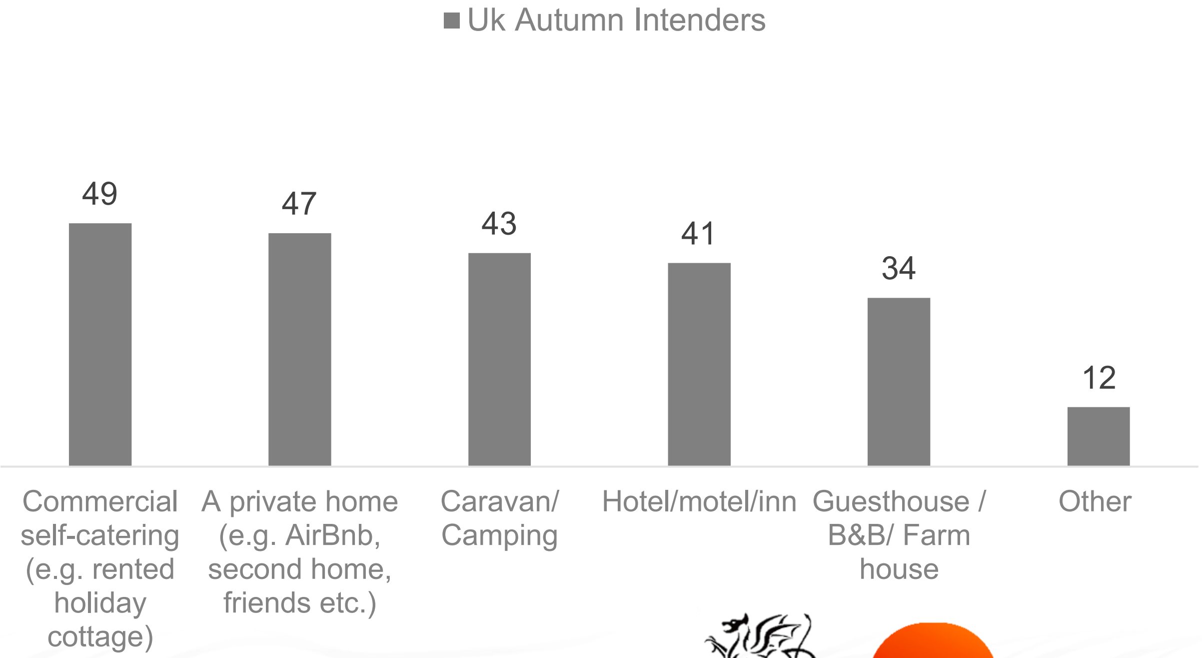


Figure 67. Accommodation categories planning on staying in on next UK overnight trip for Autumn intenders, Net percentage Waves 44-46, UK



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447

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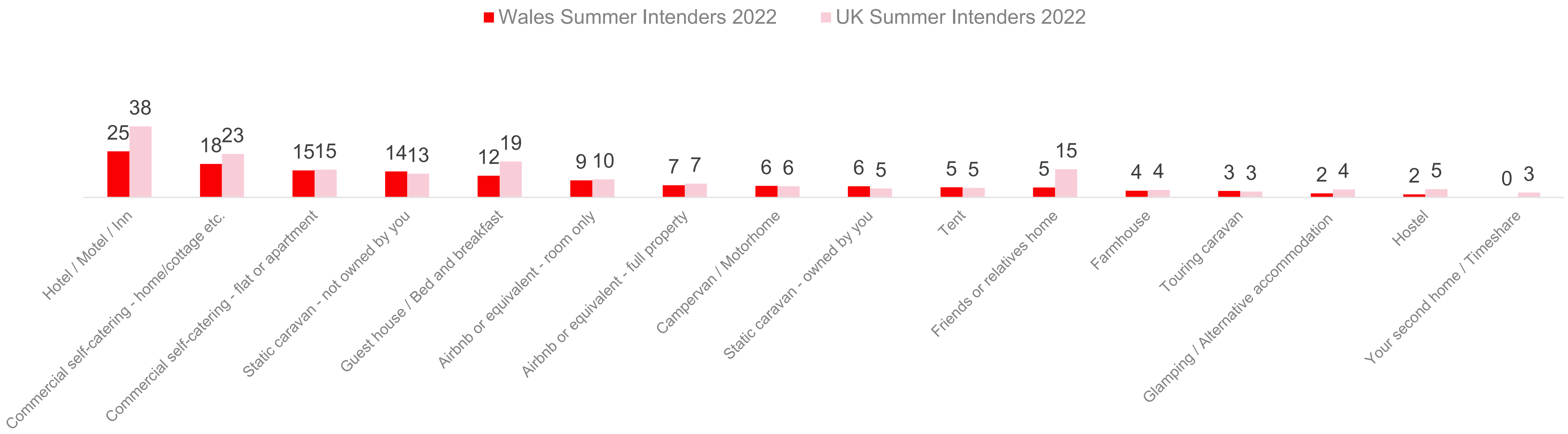
Type of accommodation for next Wales short break or holiday - FULL LIST

- The most common single accommodation type intended for Wales summer 2022 trips is ‘hotel/motel/inn’, followed by ‘commercial self-catering – home cottage’ and ‘commercial self-catering – flat or apartment’. ‘Static caravan – not owned by you’ is the leading accommodation in the ‘camping/caravan category’.

Figure 68. Accommodation planning on staying in on next UK overnight trip for Summer intenders, Full list, Waves 44-46, UK



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752;

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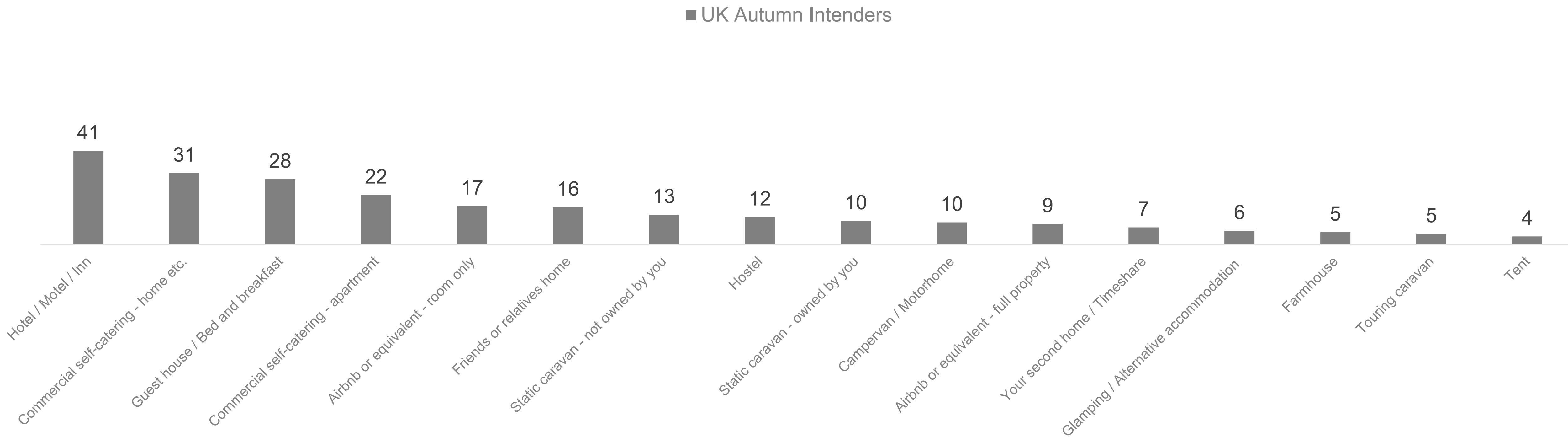
Type of accommodation for next UK short break or holiday – FULL LIST

- 'Hotel/motel/inn' is also the single most popular individual accommodation type for a UK trip in autumn.

Figure 69. Accommodation categories planning on staying in on next UK overnight trip for Autumn intenders, Full list Waves 44-46, UK



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a domestic holiday or short break in the UK. UK Autumn Intenders n=447

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Main mode of transport for next Wales short break or holiday

- ‘Own car’ is the most dominant mode of transport Wales intenders are likely to use to travel to their short break or holiday destination this summer – significantly more so than UK intenders. Conversely, ‘train’ is significantly less preferred, correlating with relatively lower intention to stay in a ‘large city or town’. Transport intentions are similar to 2021.

Figure 70. Main mode of transport for Summer intenders, Net percentage Waves 44-46, UK

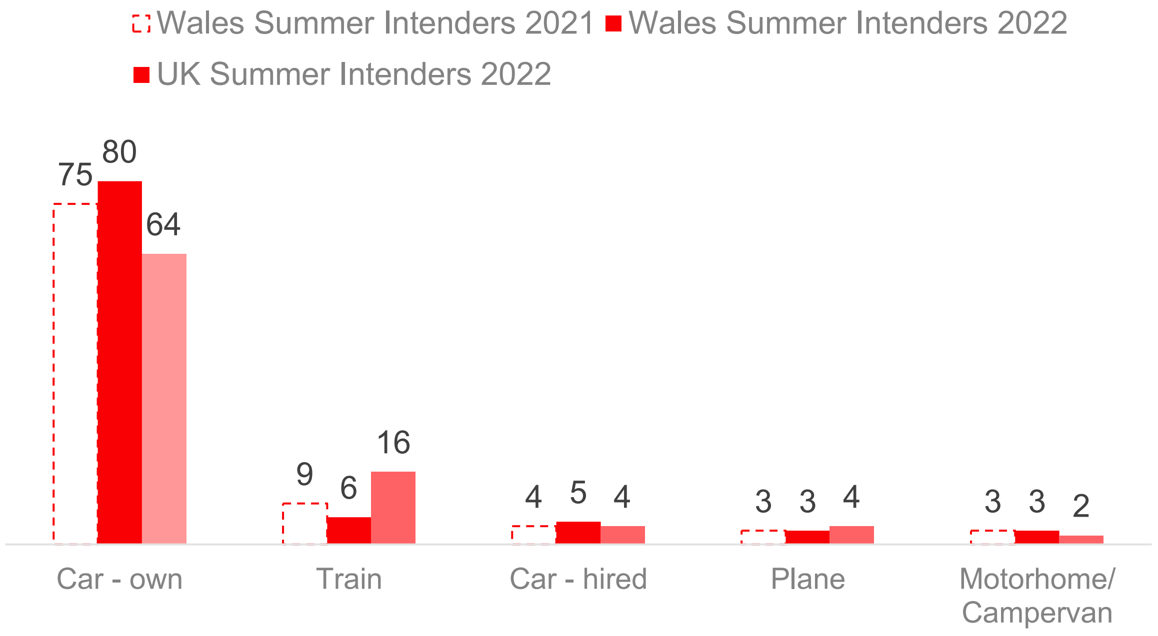
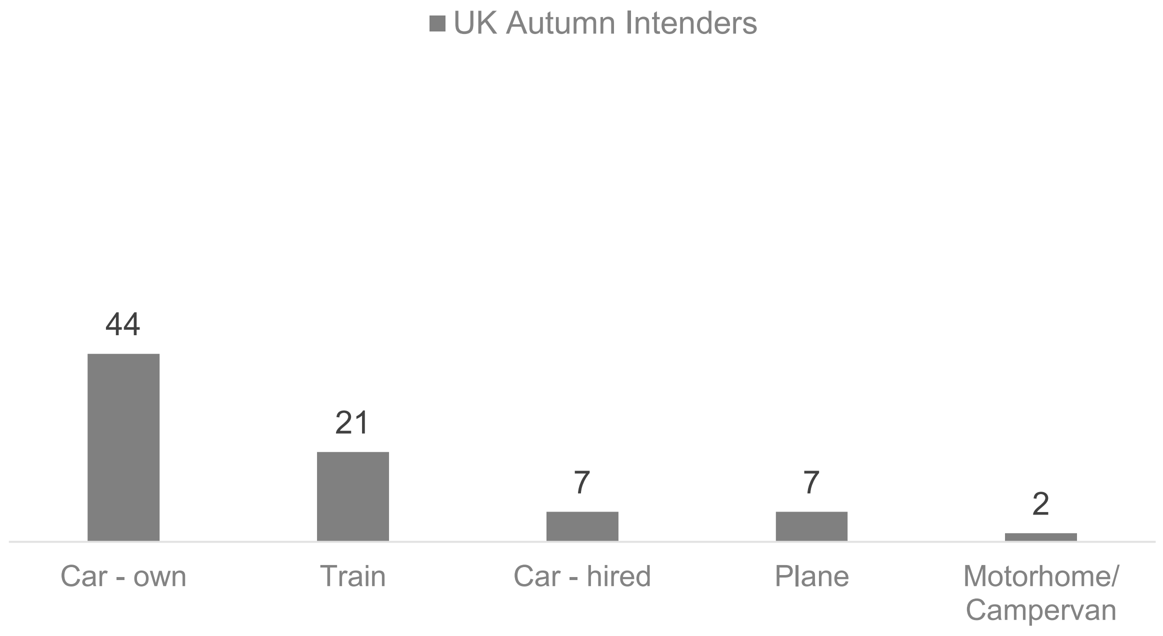


Figure 71. Main mode of transport for Autumn intenders, Net percentage Waves 44-46, UK



VB4c. What do you anticipate being the main mode of travel to your next UK holiday or short break destination in <INSERT MONTH FROM VB2A> ? Base: All respondents planning on taking a domestic holiday or short break in the UK. Wales only summer intenders n=131; UK Summer Intenders n=1,752; UK Autumn Intenders n=447

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Trips taken since January 2022

Incidence of UK and overseas trips taken since January 2022

- 21% of UK residents and 24% of Wales residents have taken an overnight domestic trip since January this year, with incidence highest in April.
- Around 1 in 12 UK and Wales residents have taken an overseas trip since the start of the year.

Figure 72. Proportion taken an overnight UK trip in below time period, Percentage, Wave 46, UK

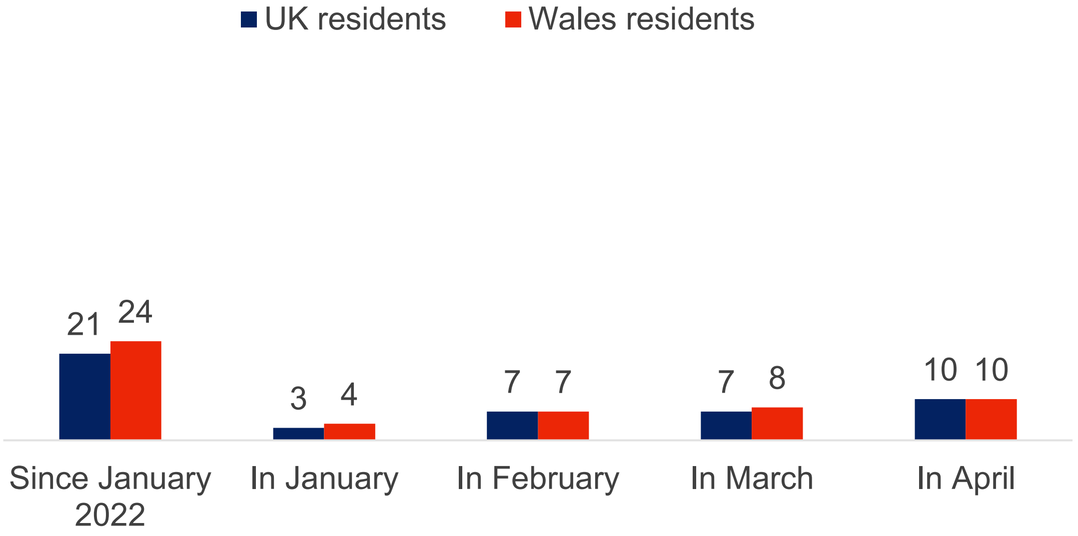
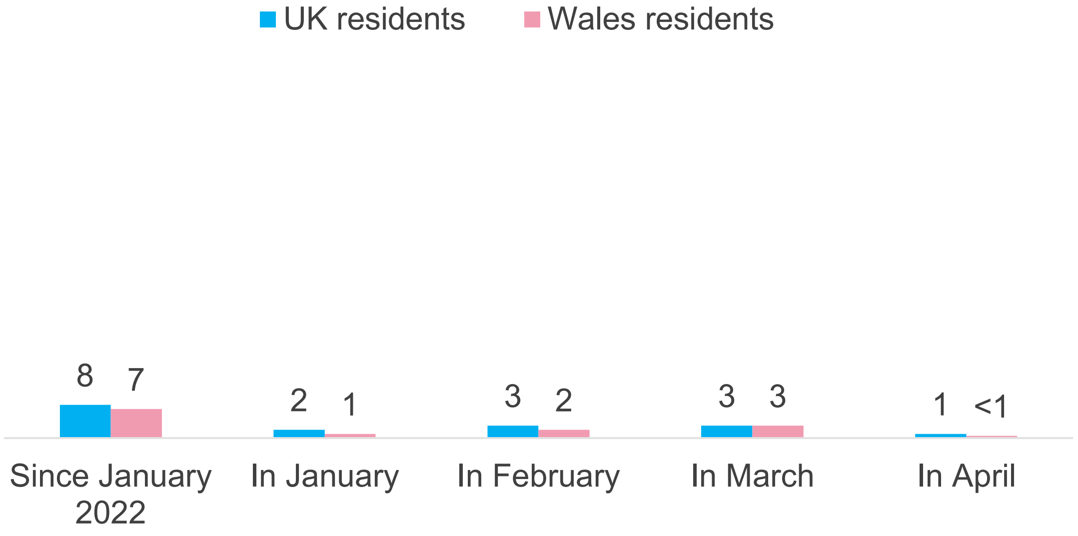


Figure 73. Proportion taken an overnight OVERSEAS trip in below time period, Percentage, Wave 46, UK



VB13a/e. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas since the start of Jan 2022? Base: All respondents. UK population n=1,760; Wales population n=206

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Demographics of UK and overseas trip takers since January 2022

- UK trip-takers since January are more likely than the population and overseas trip-takers in that period to belong to the retiree life stage. Families make up the highest proportion of trip-takers, which is the case for each month apart from March (when Older Independents were the largest life stage). Families also index highest for overseas trips, again consistent for every month apart from March, when Older Independents are the largest group.
- Both UK and overseas trip-takers since January are less likely than the general population to belong to lower social grades.

Figure 74. Breakdown of population and trip-takers since Jan 2022 by life stage, Percentage Wave 46, UK

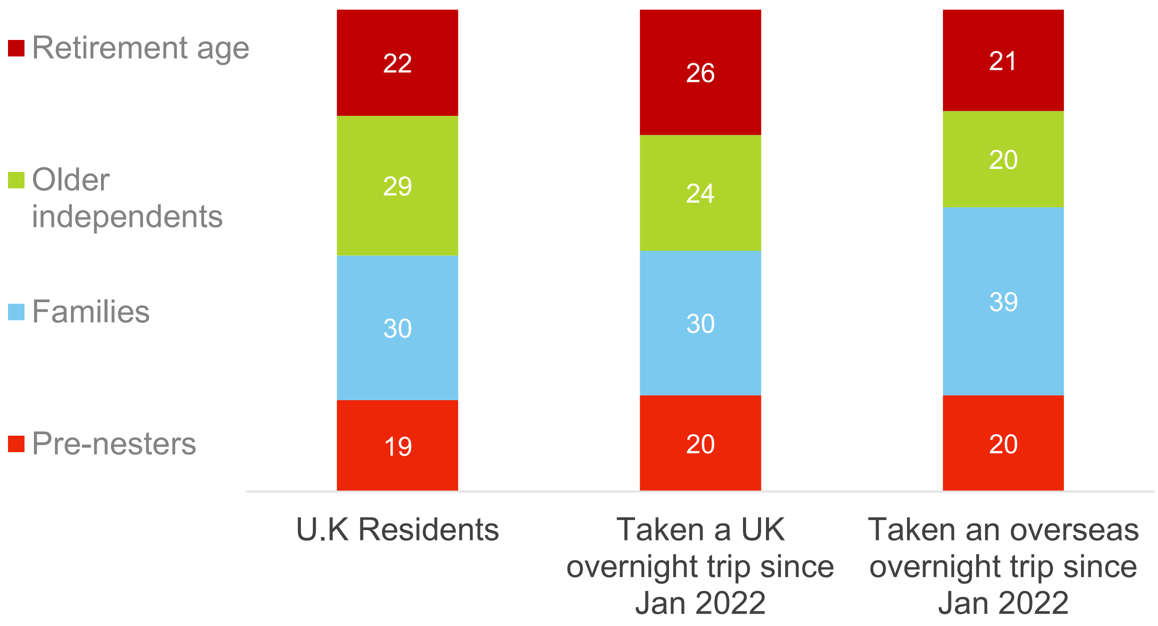

Figure 75. Breakdown of population and trip-takers since Jan 2022 by social grade, Percentage Wave 46, UK

Source: Demographics. Base: All respondents. UK residents n=1,760; Taken a UK trip since January 2022 n=383; Taken overseas trip since January 2022 n=149

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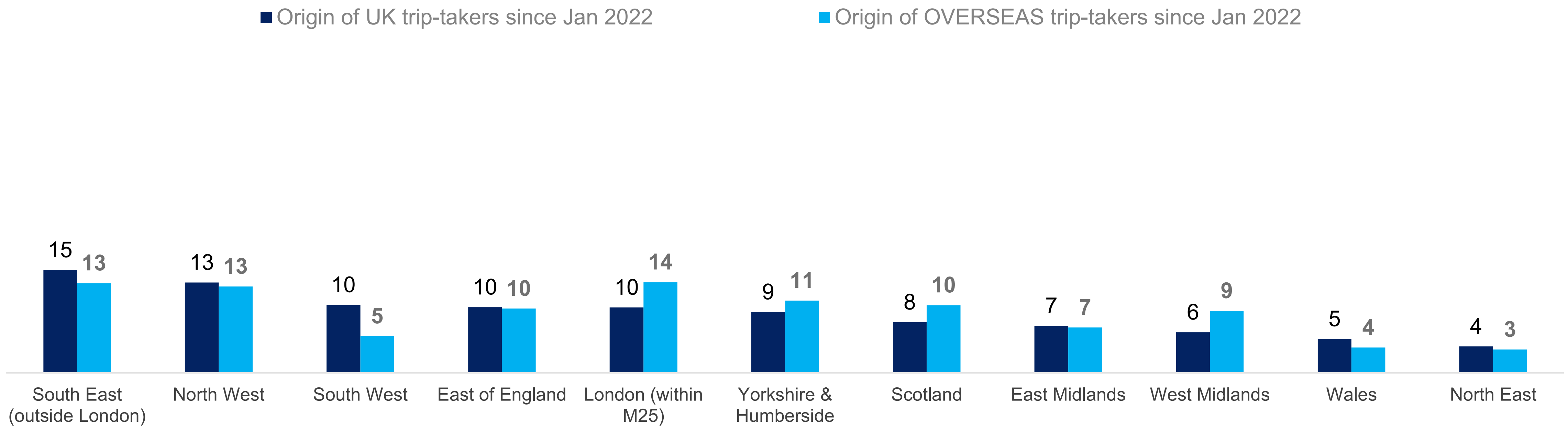
Origins of UK and overseas trip takers since January 2022

- The South East of England is the region that has generated the highest proportion of UK trip-takers so far this year, London the highest proportion of overseas trip-takers.

Figure 76. Region of origin of trip-takers since Jan 2022, Percentage, Wave 46, UK



VB13a/e. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas since the start of Jan 2022? Taken a UK trip since January 2022 n=383; Taken overseas trip since January 2022 n=149

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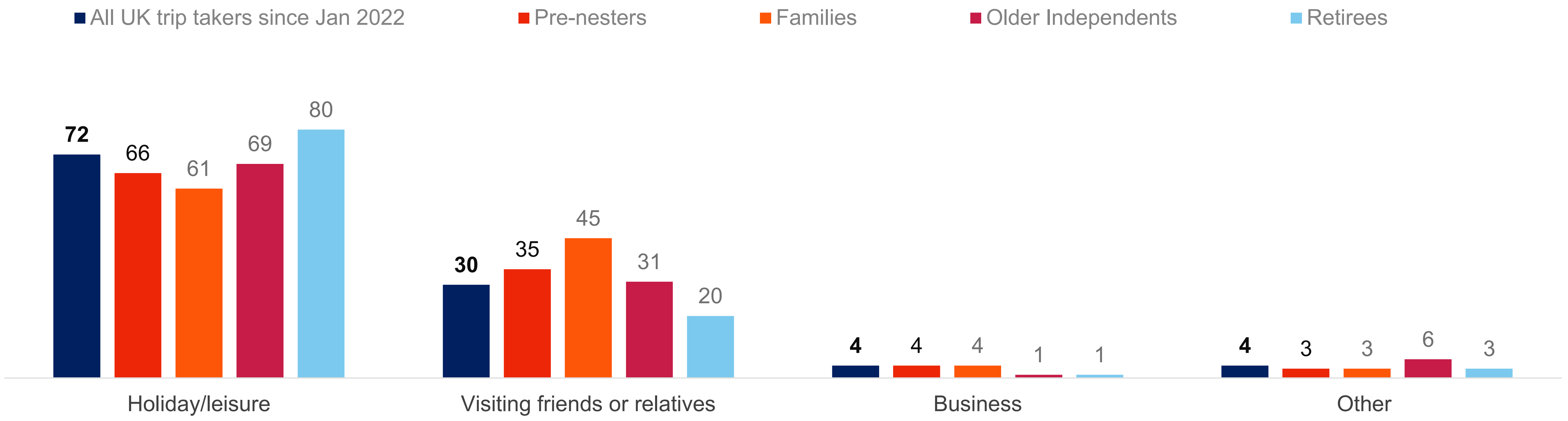
Trip purpose of UK and trip-takers since January 2022

- 7 in 10 trips taken since January 2022 were taken for holiday/leisure (highest amongst retirees), 3 in 10 for visiting friends or relatives (highest amongst families).

Figure 77. Main purpose/s of trip taken since Jan 2022, Percentage, Wave 46, UK



VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>? Base: All UK trip-takers since Jan n=955; Pre-nesters n=208; Families n=390; Older Independents n=205; Retirees n=152

Destination of UK trips taken since Jan 2022*

- Consistent with most reporting over the last two years, the South West of England was the destination UK trip-takers were most likely to have stayed at, followed by Yorkshire and the Humber, and Scotland.
- Similar to trip intenders, non-Wales residents make up the majority of trip-takers to Wales, the North West of England, South West of England, London and the West Midlands the leading regions of origin.

Figure 78. Destination stayed in on most recent UK overnight trip since Jan 2022, Percentage, Wave 46, UK and Wales Residents

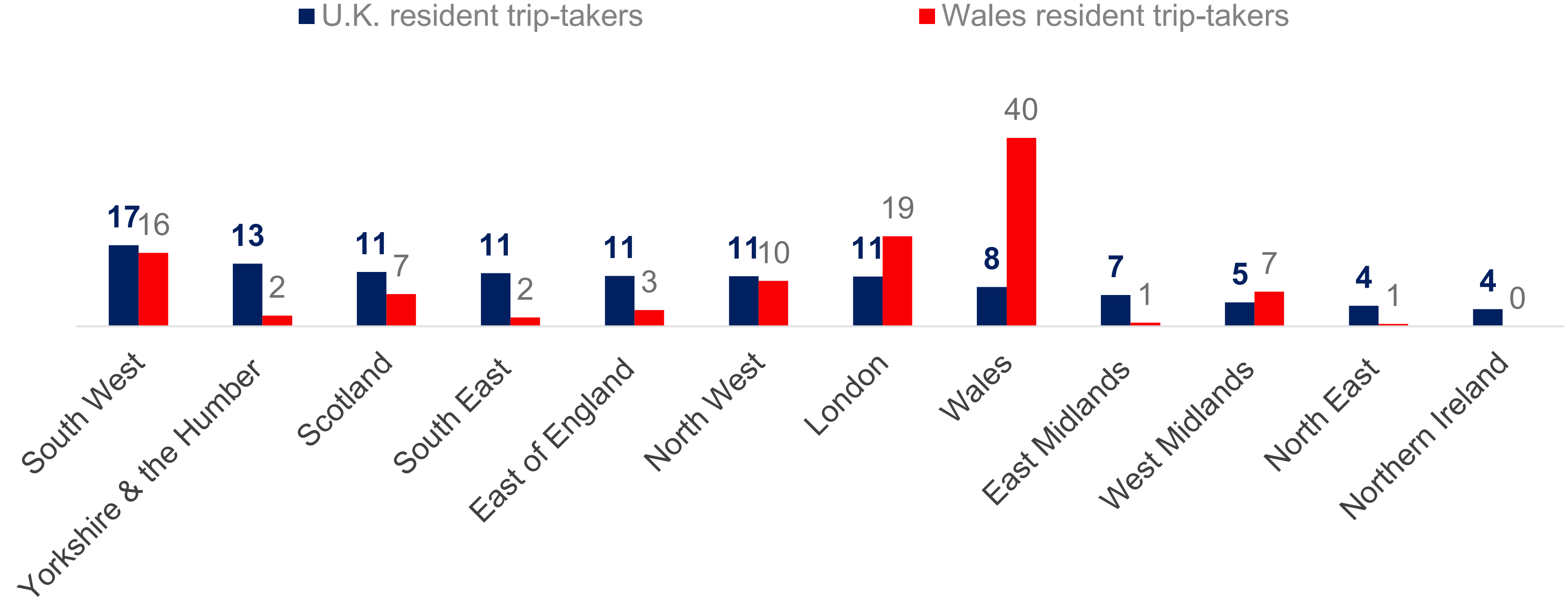
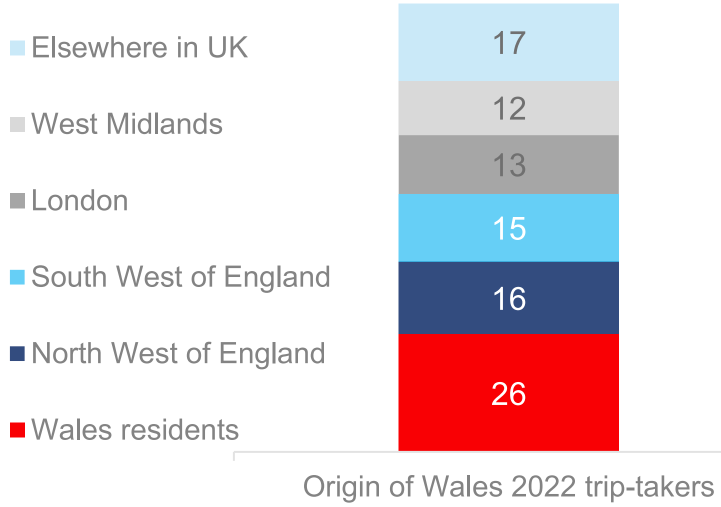


Figure 79. Breakdown of Wales trip-takers by region of residence, Percentage, Waves 44-46, UK



VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>?
Base: All UK residents that took a UK overnight trip since Jan 2022 n=383; All Wales residents that took a UK overnight trip since Jan 2022 n=52; Wales 2022 trip-takers n=76
*Note: Questions ask about latest trip, so there will be a natural bias towards trips taken later in the year

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Demographics of UK and Wales trip takers since Jan 2022*

- Families make up the highest proportion of trip-takers to Wales since Jan 2022, followed closely by retirees, who index significantly above their fall-out in the UK population, and among UK trip takers.
- Social grades AB also index higher amongst Wales trip-takers since January compared to the UK population, and to UK trip takers.

Figure 80. Breakdown of population and trip-takers since Jan 2022 by life stage, Percentage Waves 44-46, UK

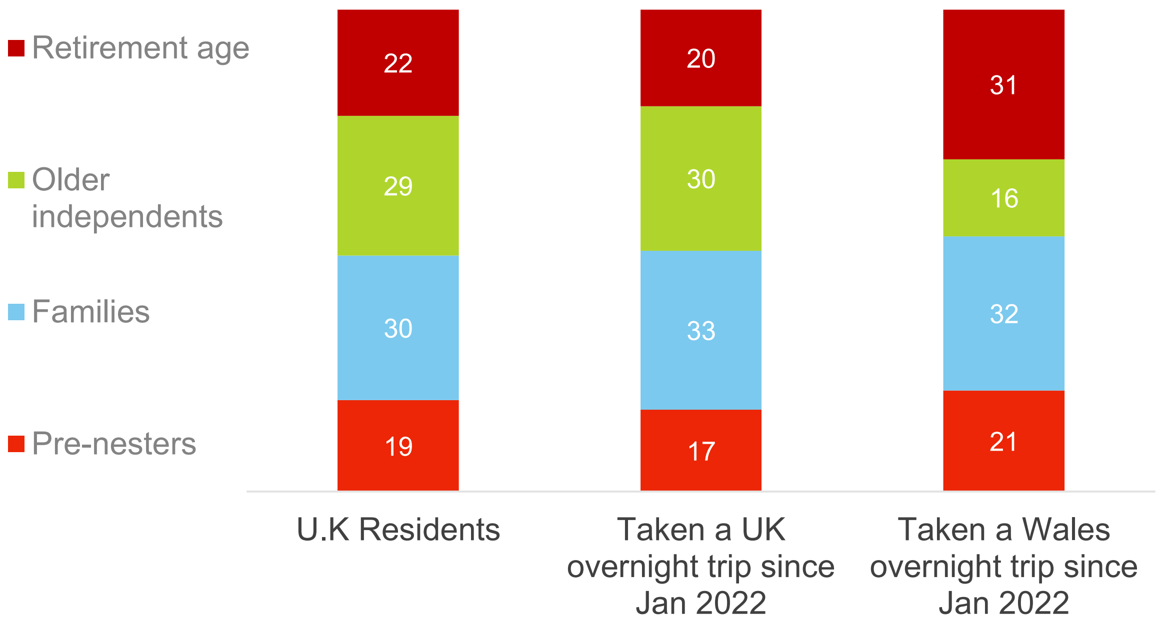


Figure 81. Breakdown of population and trip-takers since Jan 2022 by social grade, Percentage Waves 44-46, UK

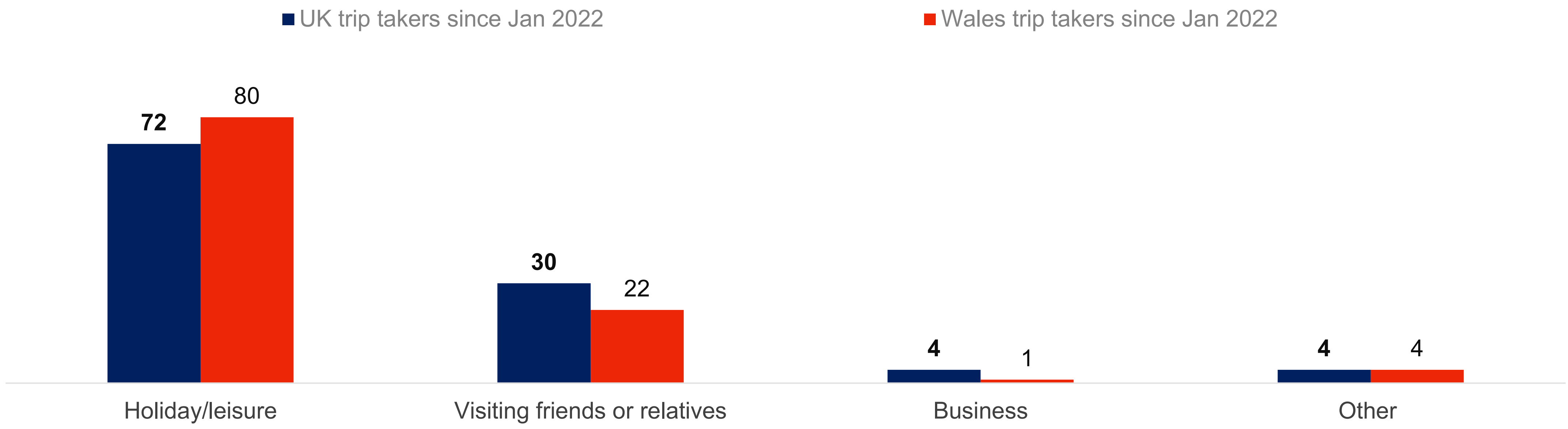
Source: Demographics. Base: UK residents n=5,274 All UK residents that took a UK overnight trip since Jan 2022 n=873 All UK residents that took a trip to Wales since Jan 2022 n=76

*Note: Trip-takers are defined by latest trip to Wales, so there will be a natural bias towards trip-takers later in the year

Trip purpose of UK and Wales trip-takers since January 2022*

- The vast majority (80%) of Wales trip-takers since January took their trip for holiday/leisure - at 80%, higher than trip-takers to the wider UK.

Figure 82. Main purpose/s of trip taken since January 2022, Percentage, Wave 46, UK



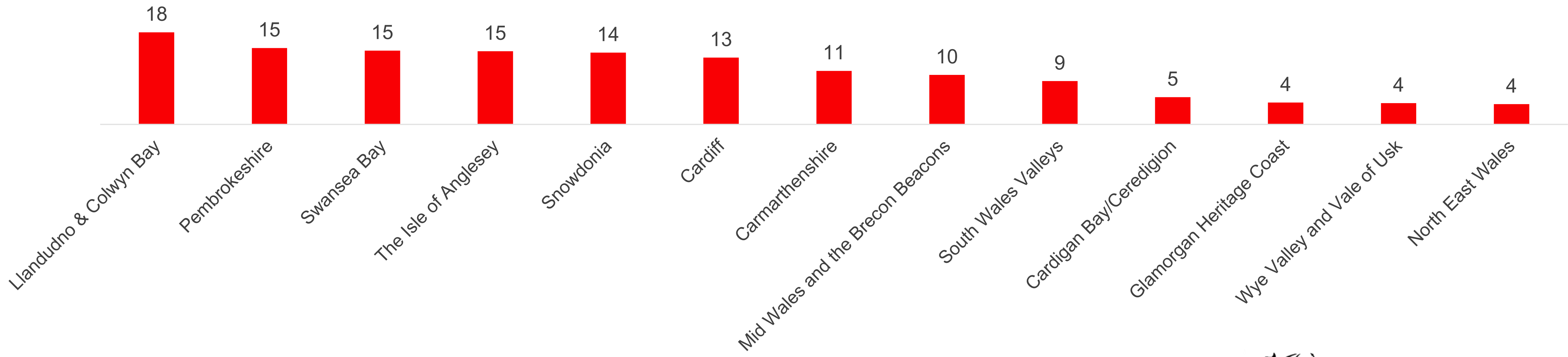
VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>? Base: All UK residents that took a UK overnight trip since Jan 2022 n=873; All UK residents that took a trip to Wales only since Jan 2022 n=54 (not small base sizes)

*Note: Trip-takers are defined by latest trip to Wales, so there will be a natural bias towards trip-takers later in the year

Destination stayed in on Wales trip since January 2022

- Trip-takers to Wales since January visited a range of destinations on their trip – Llandudno & Colwyn Bay, Pembrokeshire, Swansea Bay, The Isle of Anglesey and Snowdonia the top 5. Notably, trips to Swansea Bay and Cardiff are more likely to include visits to friends or relatives, compared to other destinations.

Figure 83. Destination of Wales trip taken since Jan 2022, Percentage Waves 44-46, UK and Wales



QVB4viii. Where in Wales did you stay on your most recent overnight trip to Wales?
Base: Wales trip-takers since Jan 2022 n=76
Note: Trip-takers are defined by latest trip to Wales, so there will be a natural bias towards trip-takers later in the year

Llywodraeth Cymru
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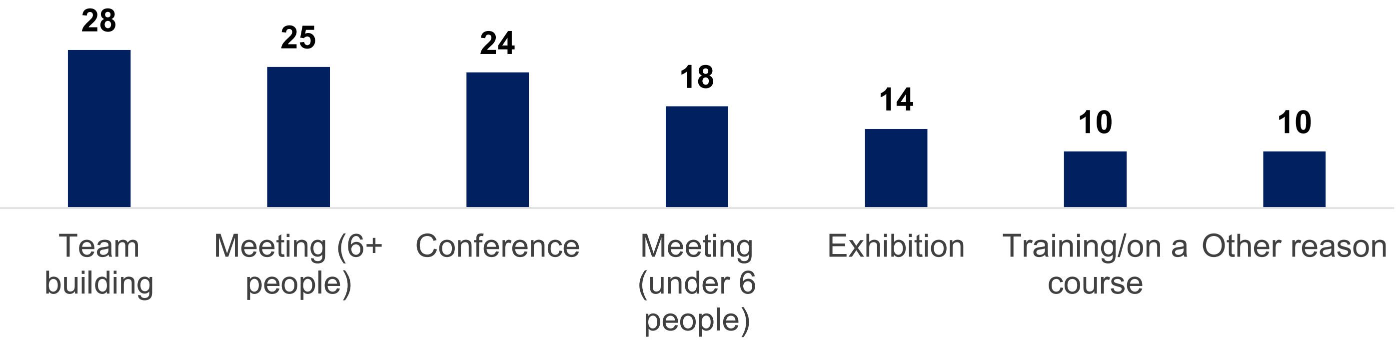
Travelling for business

Intention to take an overnight business trip in the next three months

- 16% of UK adults in employment intend to take an overnight business trip in the next three months, dropping to 12% of Wales residents. 'Team building' is the most prevalent reason for an overnight trip – chosen by nearly 3 in 10 (28%).

Figure 84. Proportion anticipating an overnight business trip in the next three months, Percentage, Waves 44-46, UK

Figure 85. Reasons for taking an overnight business trip, Percentage Waves 44-46, UK residents in employment



VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months?
Vb14b. What would be the main reason for this overnight business trip? Base: All UK respondents in employment n=3,953; All Wales respondents in employment n=449 All respondents anticipating an overnight business trip n=678

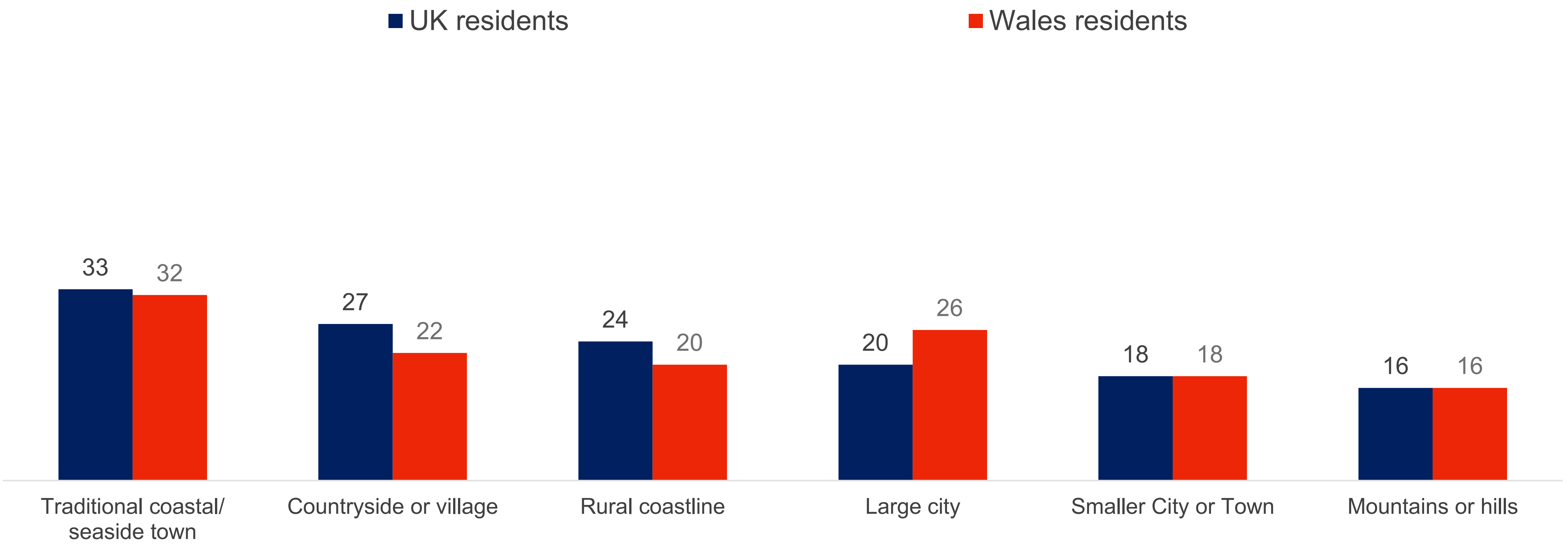
Llywodraeth Cymru Welsh Government

Day trip intention

Intention to take a day trip by destination type

- Both UK and Wales residents are most likely to be planning on taking a day trip to a 'traditional coastal/seaside town' between May and September, with relatively similar intention for most other destination types.

Figure 86. Next UK day trip intention between May and September, Cumulative percentages, Wave 46, UK

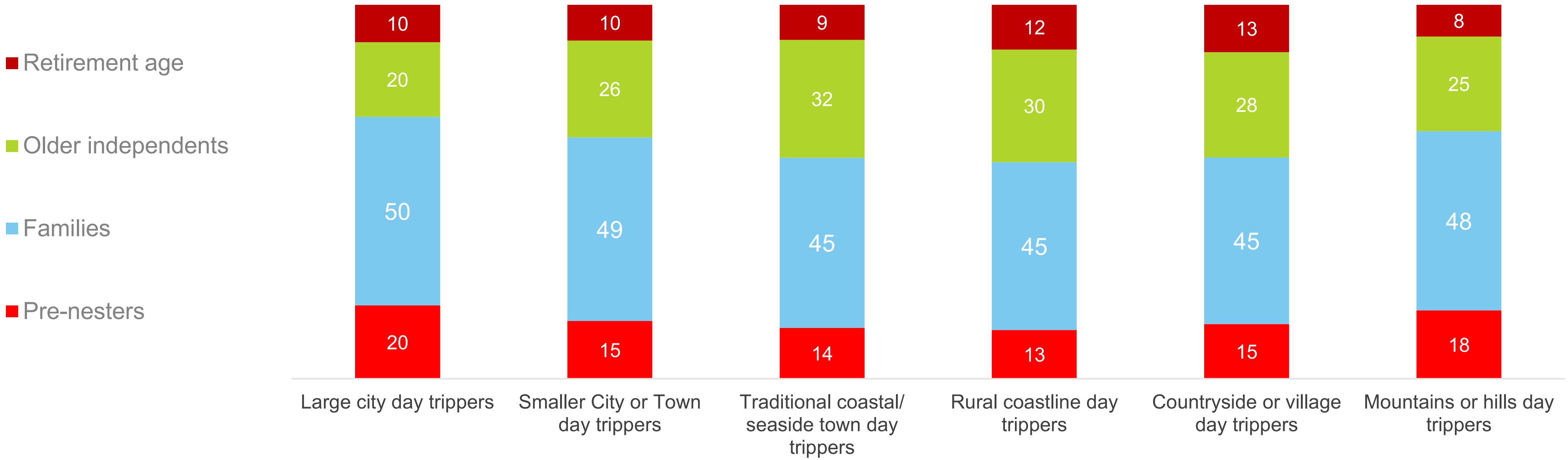


Vb16. When are you next likely to take a day trip to the following types of places? Base: All respondents. UK population n=1,760; Wales population n=206

Demographics of Wales-based day-trippers by destination

- The life stage of day-trippers varies depending on destination type, older life stages more prevalent amongst ‘rural coastline day trippers’ and younger life stages more dominant in ‘large cities’.

Figure 87. Breakdown of UK day-trippers between May and September by destination type and life stage, Percentage Waves 44-46, Wales



Vb16. When are you next likely to take a day trip to the following types of places? Base: Wales-based Large city day trippers n=174; Smaller city or town day trippers n=158; Traditional coastal town day trippers n=248; Rural coastline day trippers n=172; Countryside or village day trippers n=195; Mountain or hills day trippers n=145. Three waves used to increase base sizes

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Methodology

Methodology

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

The sample is representative of UK adults aged 16+ by gender, age, government region and social grade.

In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' in Scotland and Wales to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

This report aggregates the results taken from Waves 44-46 of the COVID-19 consumer tracker.