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COVID-19 U.K. Tourism Consumer Tracker Survey: Wales profile report 2021 (Waves 37-39)

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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 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 predominantly based on data from Waves 37-39. This is based on fieldwork taking place during the following dates:

- **Wave 37: 9th to 13th August 2021**
- **Wave 38: 23rd to 27th August 2021**
- **Wave 39: 6th to 10th September 2021**

In some cases, waves 37 and/or 38 have been excluded. This is typically to capture current 'mood and sentiment' although in some cases this isn't possible to due to small base sizes. For business questions – which are asked just once a month - Wave 36 (26th to 31st July) is also included.

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Definitions used within this report (1)

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.

- **U.K. September to December Intenders:** Members of the public who state their next holiday or short break will be between September and December 2021.
- **Wales September to December Intenders:** Members of the public who state their next holiday or short break will be in Wales between September and December 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+.

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. 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, leisure behaviour and travel confidence

1. As of early September, the U.K. public are marginally more likely to think that 'the worst is still to come' than the 'worst has passed' in relation to COVID-19. The latest sentiment confirms a departure from most of 2021, when significantly more people felt 'the worst has passed'. These findings suggest that, on balance, the public do not expect conditions to change anytime soon – a conclusion supported by just 14% expecting normality by December, and less than half (49%) by April to June 2022. The fall in optimism is driven predominantly by older age groups. Between January and July, retirees and older independents were the life stages most likely to believe that 'the worst has passed', but as of August and September they are *as likely* to think this as pre-nesters and families.
2. Flattening optimism may in part be a reflection of lower headroom for improvement, rather than fears things are immediately getting worse. This argument is supported by current leisure behaviour, with the U.K. public reporting higher levels of leisure activity in August than any month since the start of the pandemic.
3. Similarly, comfort levels with the majority of everyday activities are at their highest since this research began. The proportion comfortable with going to a restaurant is now at 71% (32 percentage points higher than in early March and 8 points higher than July); to an indoor visitor attraction at 57% (23 points higher than March and 5 higher than early July); and 'shopping in your local shopping centre' at 69% (18 points higher than March and 4 points higher than early July).
4. However, despite these positive signs, there remains reason for caution. Confidence that a booked domestic trip would go ahead drops with each consecutive month from September to December, driven by retirees and older independents. Most notably, 'I have concerns around catching COVID-19' is the leading reason for low confidence – the first time it has been most influential since the start of the year. Retirees and older independents are the most likely to state this (in earlier reporting following the vaccine roll-out they were the least likely to), perhaps explaining their increasing pessimism. Fears that government restrictions will impact trips are significantly lower than in previous reporting, suggesting that barriers to travel are currently 'personal' rather than 'logistical'.
5. Wales residents tend to be more pessimistic about the future – indexing higher than the wider U.K. on 'the worst is still to come', with a longer lead time to normality and lower comfort levels with everyday activities. Travel confidence amongst Wales residents is also lower, as is the net anticipated number of short breaks and longer breaks over the next six months.

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Key findings (2)

Upcoming trip intentions (overnight visitors)

1. 31% of U.K. residents intend to take an overnight trip between September and December, slightly lower amongst Wales residents (at 29%). The highest proportion of overnight trips is likely to be in October followed by September. November and December are set to generate relatively fewer trips.
2. Pre-nesters and families are the most likely to be planning an overnight trip between September and December, although the differences across life stage are relatively marginal. That said, intention amongst retirees and older independents drops off in November and December, correlating with their lower travel confidence in those months.
3. Overseas travel is unlikely to threaten U.K. trips - in the event of overseas travel restrictions being lifted, the vast majority state they would take their U.K. overnight trip as planned. That said, 20% of pre-nesters would take an overseas trip as well and 9% would take one instead; 28% and 6% amongst families. Older independents and retirees are less likely to take an overseas trip.
4. All life stages are likely to book their overnight trip closer to the date than normal, although around half will be booking in line with typical behaviour. Retirees are the life stage most likely to have already booked their September to December trip. Combined with them being one of the least likely to switch to an overseas trip, it may be that retirees make up a higher proportion of actual trip-takers.
5. The South West of England is the most preferred destination for a September to December trip, continuing a trend that has been in place since the start of the pandemic. Wales is the 7th most preferred destination for a September to December trip, a contrast to July/August where it was joint 3rd. Amongst Wales *resident* intenders, Wales remains the number one destination, generating twice as many intenders as the next most popular destination (the South West of England).
6. 4 in 5 Wales trip intenders live elsewhere in the U.K., nearby West Midlands and North West of England the leading contributors.
7. Notably, Wales intenders are more likely to belong to the retiree life stage than U.K. intenders and the wider U.K. population – a trend that was also evident for trips taken since April. Social grades AB also over-index against the population.
8. The vast majority of overnight trips to Wales between September and December are likely to be for a ‘holiday’, with short-breaks making up a majority – both consistent with wider U.K. trips.

Key findings (3)

9. Wales intenders for September to December plan on visiting a wide range of places in Wales, although there are differences depending on place of origin. Wales residents are significantly more likely to plan on staying in Pembrokeshire, whilst non-Wales residents are two times more likely to stay in Snowdonia.
10. 'Traditional coastal/seaside town', 'countryside or village', and 'rural coastline' are the three leading destination types for Wales September to December intenders this year. U.K. intenders have the same top two preferences, but are significantly less likely to be intending to visit the rural coastline and significantly *more* likely to be intending to visit a large city or smaller city or town.
11. A range of accommodation types are being considered by Wales and U.K. September to December intenders – minimal separation between anticipated stays in a 'hotel/motel/inn', 'commercial self-catering', 'a private home' and 'caravan/camping'.
12. Continuing a trend observed since the start of this research, Wales September to December intenders expect to spend around £100 less on their overnight trip than U.K. intenders (£628 compared to £735).

Key findings (4)

General leisure and Day Trip intentions

1. 7 in 10 U.K. and Wales residents plan on taking a day trip by autumn or later. Intentions are highest for less populated destination areas such as 'traditional coastal/seaside town' and 'countryside or village', and lower for large cities.
2. In line with growing comfort levels, the U.K. public's engagement in leisure activities has increased with each consecutive month since restrictions were lifted earlier this year – August reporting the highest.
3. Leisure intentions remain stronger for outdoor based attractions and activities. At a net level, engagement with indoor venues and activities are close to normal, suggesting potential resilience as we enter the Autumn and Winter.
4. Amongst both U.K. and Wales residents, 'garden or country park' remains the visitor attraction type set to experience a net increase in visits, alongside 'castles, forts or other historic sites', 'zoos/farm attractions' and 'historic houses/palaces'. 'Scenic/historic railways', 'outdoor playgrounds' and aquariums are set to generate close to normal engagement.
5. 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'
6. Both U.K. and Wales adults anticipate visiting restaurants with outdoor and indoor seating more than normal in the next few months.

Upcoming Business Trips

1. Only 12% of U.K. adults in employment intend to take an overnight business trip in the next 6 months, dropping slightly to 7% 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. 40% of U.K. residents and 45% of Wales residents took an overnight domestic holiday or short break between April and August. The highest proportion of bookings and trips taken were in August, particularly amongst Wales residents where trips taken accounted for almost twice as many as any other single month.
2. U.K. residents were significantly less likely to have taken an overseas trip since April and those that did were dominated by 'COVID confident' groups such as families and the 'less to lose' COVID segment. There is minimal evidence of a growing appetite for overseas holidays amongst the majority of the U.K. public.
3. In line with intentions, the South West England generated the highest proportion of all trips since April, with Wales positioned in joint 6th. However, if looking only at *holiday trips* taken in the *peak July/August period*, Wales rises to the joint 3rd most popular destination. Amongst Wales residents, Wales was the number one destination, although 3 in 4 trip-takers came from elsewhere in the U.K.
4. Consistent with previous reporting, Wales is one of a number of regions of the U.K. where the majority of trips taken were for a 'holiday' purpose, although 3 in 10 were to visit friends or family.
5. Similar to all U.K. trip-takers, 2 in 5 Wales trip-takers belonged to the 'family' life stage (rising for Wales holiday takers), and over half to social grades C1C2. Consistent with Wales September to December *intenders,* Wales trip-takers were more likely to be retirees, indexing above the U.K. population and intentions.
6. 'Countryside or village' and 'traditional coastal/seaside town' were the two leading destination types for an overnight trip to Wales between April and August, both of which indexed significantly above all U.K. trips. When looking solely at trips taken for a holiday, 'traditional coastal/seaside town' was the number one destination type for Wales trips.
7. Again consistent with trip intentions, Wales-based trip-takers are significantly more likely to take trips to West Wales – in particular Pembrokeshire and Carmarthenshire. Non-Wales-based trip-takers index higher for North Wales – in particular Snowdonia, North East Wales and Llandudno and Colwyn Bay.
8. Wales trip-takers between April and August were most likely to have stayed in 'caravan/camping' accommodation, followed by 'hotel/motel/inn' and 'commercial self-catering'. Notably, stays in 'caravan/camping' made up nearly half of trips taken to Wales for a *holiday* purpose.

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Trips taken since April

Domestic and overseas trips taken since April 2021

- As of early September 2021, 40% of U.K. residents have taken an overnight domestic break since April, rising to 45% of Wales residents. Consistent with bookings, the month with the highest incidence of trips taken was August. This was especially the case for Wales residents, August trips accounting for almost twice as many as any other month. Domestic trips taken by U.K. residents were significantly above intentions in March this year.
- As implied on the previous page, the incidence of overseas trips taken this year is significantly lower than U.K. trips, and there is no immediate sign of this trend changing. 15% of U.K. residents have been on an overseas overnight trip since April, dropping to 8% of Wales residents. There was a relatively even spread of overseas trips taken by month.

Figure 2. Taken an overnight holiday or short break in the U.K. since April, Percentage Wave 39, U.K.

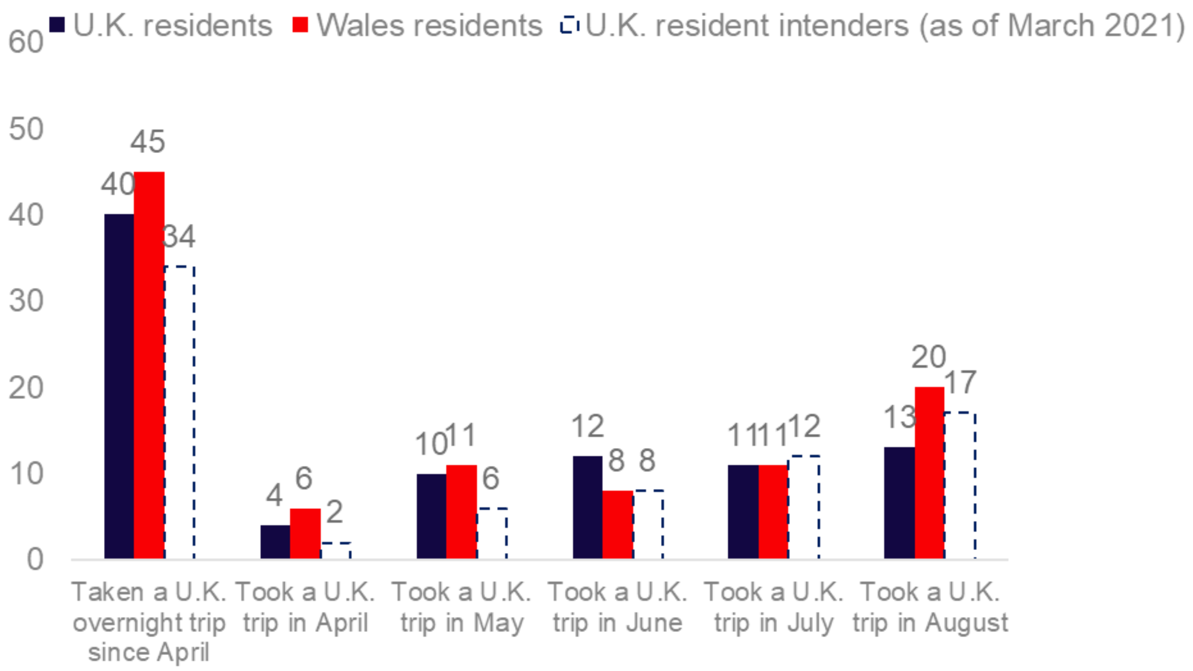
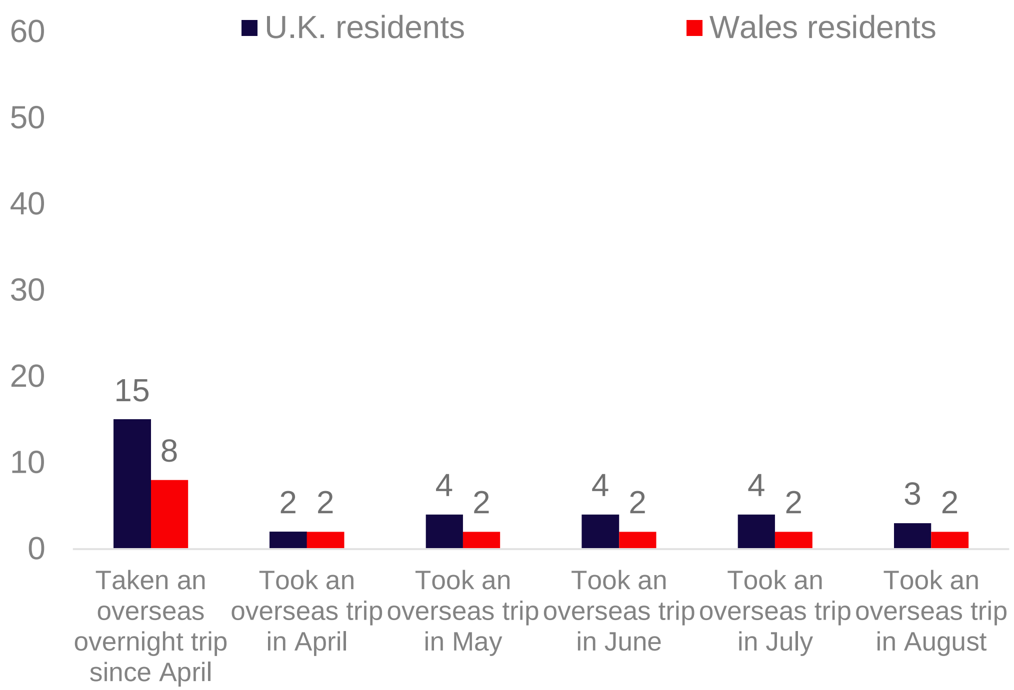


Figure 3. Taken an overnight holiday or short break OVERSEAS since April, Percentage Wave 39, U.K.



QVB13a. Have you already taken an overnight short break or holiday in the U.K./overseas since April?
Base: All Waves 38-39 respondents. U.K. residents n=1,762. Wales residents n=179.
*U.K. resident intenders are U.K. residents that planned on taking an overnight domestic trip between April and August

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Demographics of overnight trip-takers

- Families make up 2 in 5 of U.K. overnight trip-takers since April, significantly higher than their representation within the population. ‘Pre-nesters’ have equal representation to the population, ‘older independents’ and ‘retirees’ less. Although, retirees index lower than the population, they have significantly higher representation than in 2020.
- In terms of COVID segments, U.K. overnight trip-takers have higher representation amongst ‘COVID confident’ segments such as ‘less to lose’ and ‘protective but pragmatic’.
- Overseas trip-takers are dominated by the less risk-averse families (making up 64%) and ‘less to lose’ segment (making up 71%).

Figure 4. Breakdown of population and trip-takers by life stage, Percentage Waves 38-39, U.K. and Wales

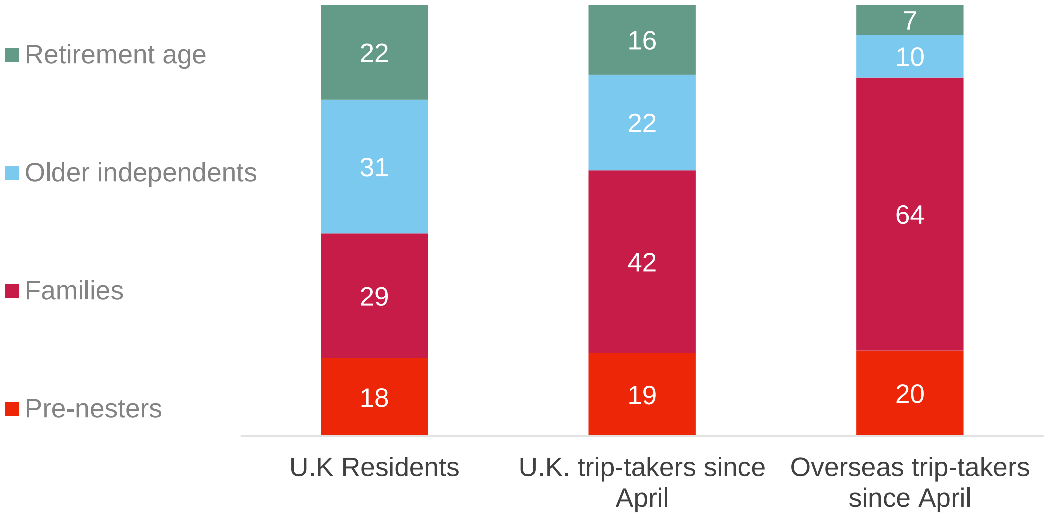
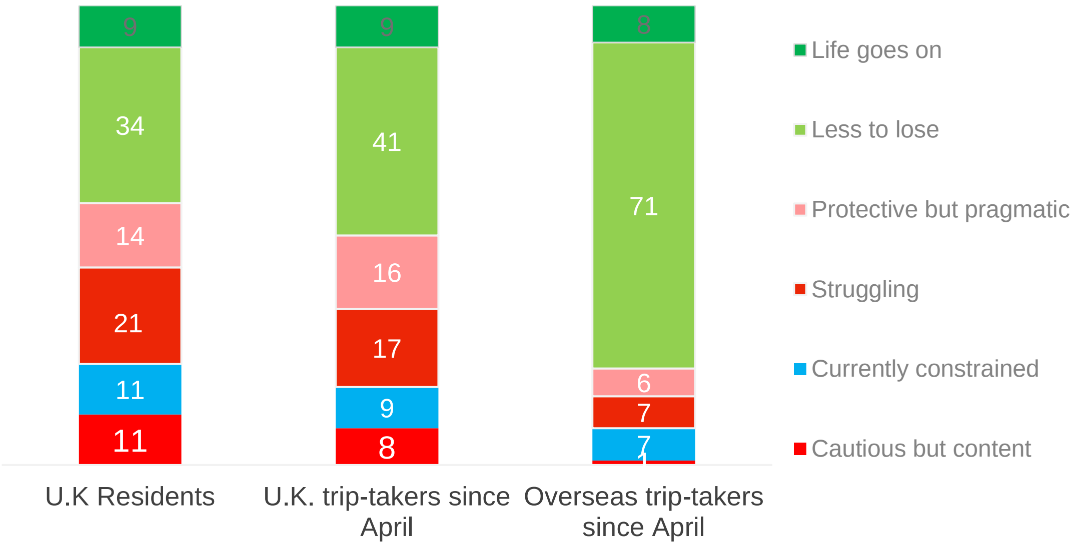


Figure 5. Breakdown of population and trip-takers by COVID segments, Percentage, Waves 38-39, U.K. and Wales

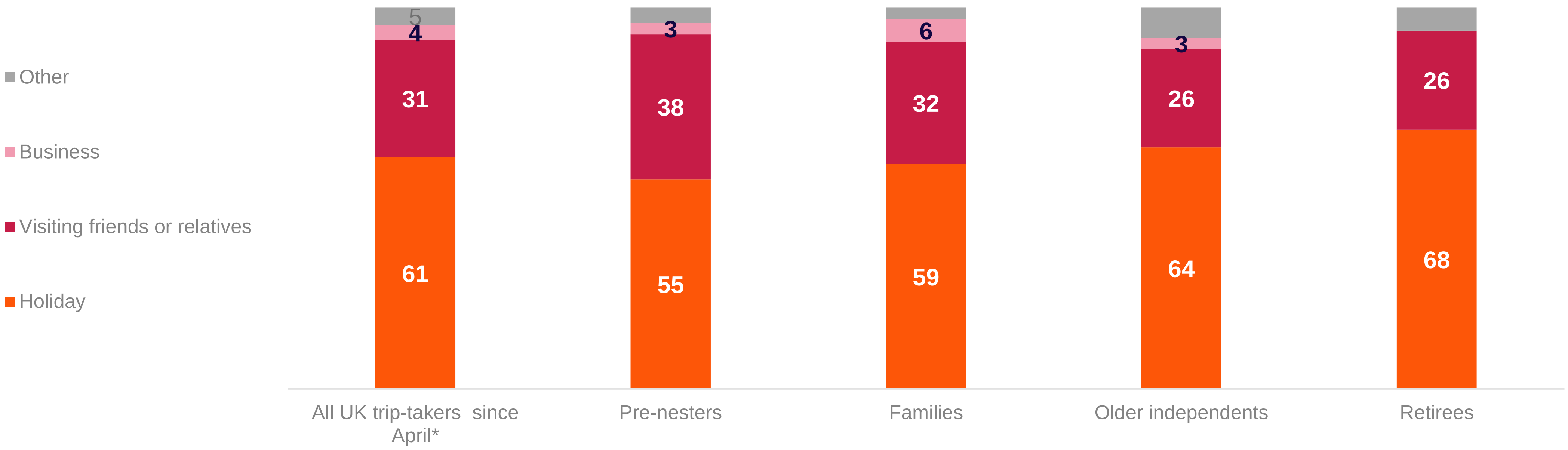


Source: Demographics. Base: All respondents. U.K. population n=3,520 U.K. trip-takers since April n=1,445; Overseas trip-takers since April n=502

Purpose of U.K. trips since April 2021

- The majority of overnight U.K. trips taken since April were for a 'holiday purpose', the incidence of this type of trip higher amongst 'older' life stages – 55% of pre-nesters taking this type of trip, 68% of retirees. 31% of trips were VFR (visiting friends or relatives) - higher amongst younger life stages.
- Looking solely at the July/August period, 'holidays' made up 68% of trips – significantly higher than the equivalent period in 2020 (55%) when restrictions had just been lifted.

Figure 6. Purpose of taken holiday or short break in UK overall and by life stage, Percentage, Waves 38-39, U.K.



VB13e. And which of the following best describes the purpose of the trip you took from April to August?
Base: All Waves 38-39 respondents. All UK trip-takers: n=1,445; Pre-nesters n=231; Families n=677; Older independents n=288; Retirees n=159*Due to questionnaire structure, responses are biased to more recent trips taken

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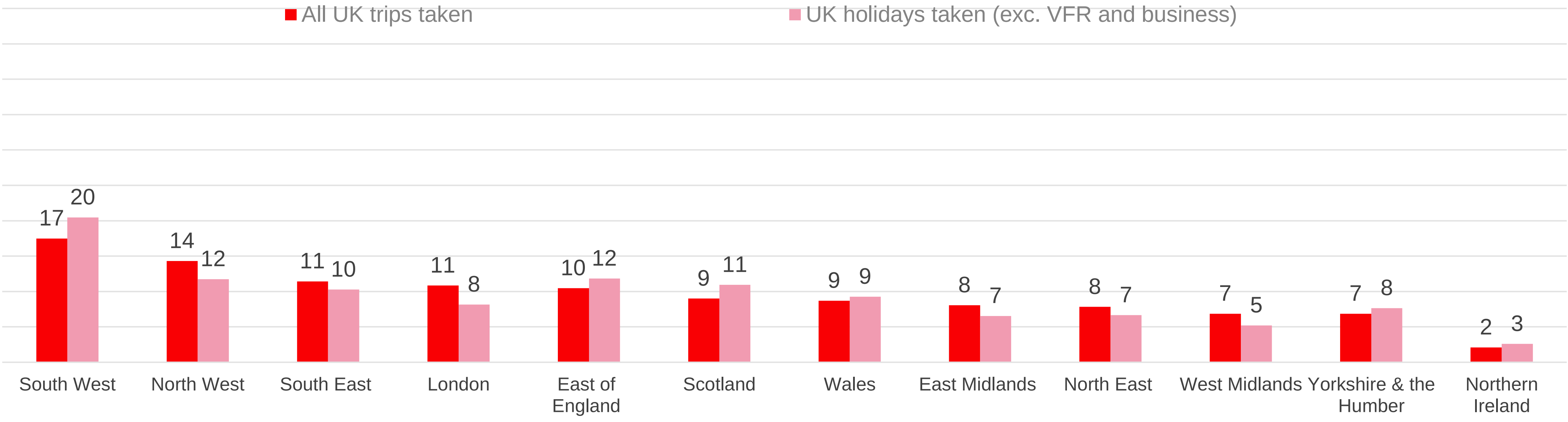
Where stayed on trips since April 2021

- In line with intentions, the South West England is the region of the U.K. that has attracted the highest proportion of all trips since April, followed by the North West, the South East and London. Wales is positioned in joint 6th with Scotland, accounting for 9% of trips taken.
- When looking *only* at trips taken for a holiday purpose, the South West extends its lead, whilst London drops further down the list. Wales retains a similar position.
- Notably, if looking only at holiday trips taken in July/August, Wales rises to the joint 3rd most popular destination alongside Scotland at 11% - aligned with pre-summer predictions.

Figure 7. Where took trips since April, Percentage Wave 38-39, U.K. and Wales Residents, Ranked on all trips



VB13c. Where in the U.K. did you stay on this trip from April to August?
Base: All respondents that took an overnight trip in the U.K. All UK trips n=1,445; All U.K. holidays or short breaks n=886

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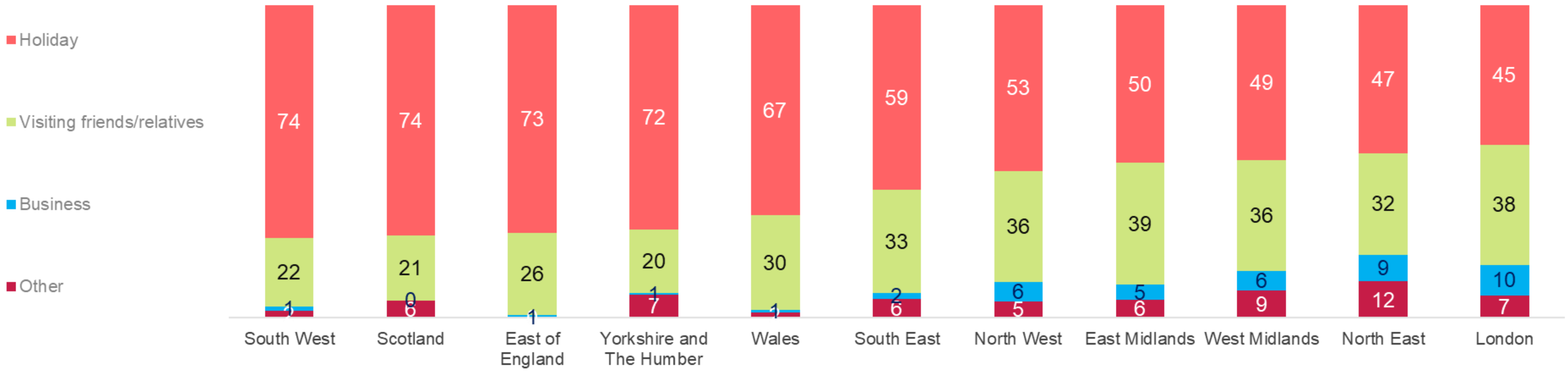
Purpose of trips since April 2021 by destination

- Two thirds (67%) of trips taken to Wales since April were for a holiday purpose, although in this regard it is ranked 5th behind South West, Scotland, East of England and Yorkshire and The Humber.
- When looking only at July/August, the incidence of 'holiday' trips to Wales rises to 71%.

Figure 8. Purpose of April to August U.K. short break or holiday by destination, Percentage Waves 38-39, U.K.



Vb13e. And which of the following best describes the purpose of the trip you took from April to August? Base: All that took a trip to exclusively to each destination Wales n=126, East of England n=95; East Mids n=77; North East n=70; North West n=171; South East n=115; South West n=188; West Mids n=70; Yorkshire and The Humber n=87;London n=111; Scotland n=141

Demographics of trip-takers since April 2021

- Similar to all U.K. trip-takers, 2 in 5 *Wales* trip-takers belong to the ‘family’ life stage (rising for Wales holiday takers), and over half to social grades C1C2. Wales trip-takers are more likely to be retirees, indexing above the U.K. population amongst this cohort.
- Retirees also indexed significantly above trip intentions for the April to August period in March this year, and had more than double the representation as in the equivalent period in 2020.

Figure 9. Breakdown of population and trip-takers by life stage, Percentage Waves 38-39, U.K. and Wales

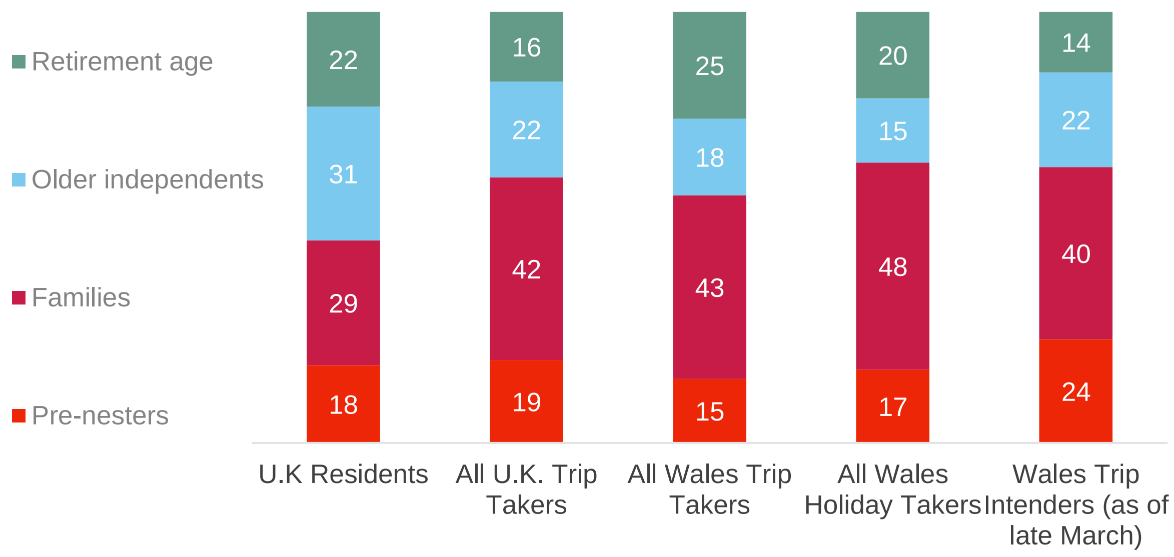
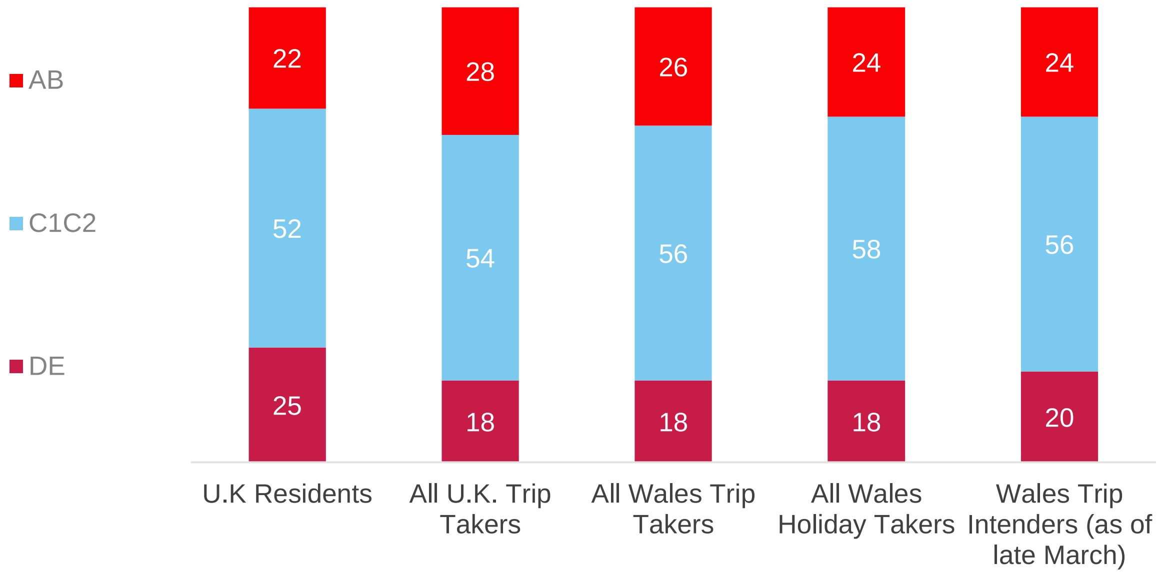


Figure 10. Breakdown of population and trip-takers by social grade, Percentage Waves 38-39, U.K. and Wales



Source: Demographics. Base: All respondents. U.K. population n=3,520 All UK trip-takers n=1,445; All Wales trip-takers n=151; All Wales holiday takers n=101

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Proportion of stays in Wales by region of residence

- More than 2 in 5 (43%) Wales residents who took an overnight domestic trip between April and August took it in Wales, rising to 55% of Wales-based *holiday-takers*. The North West of England, the West Midlands and the South West of England were the regions of the U.K. next most likely to take a trip to Wales.
- The vast majority (74%) of people that took an overnight trip in Wales, live elsewhere in the U.K.

Figure 11. Proportion of overnight trip-takers that took an April to August trip to Wales by region, Percentage Waves 38-39, U.K. and Wales, ranked on all trips

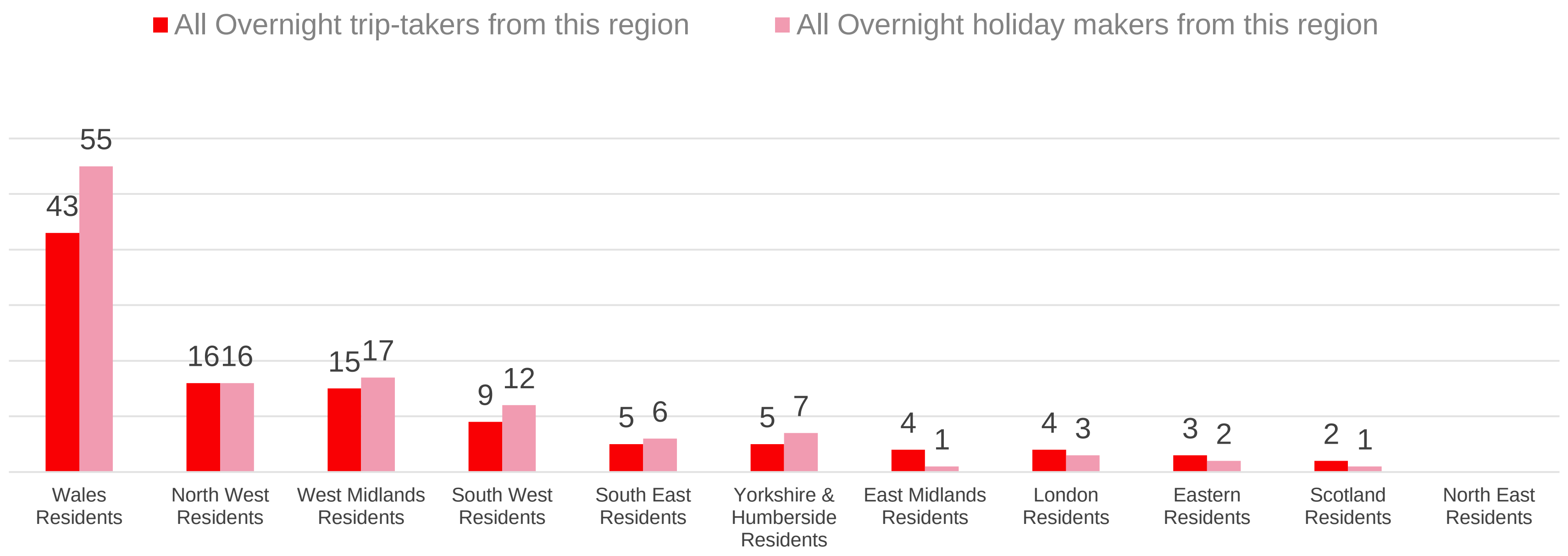
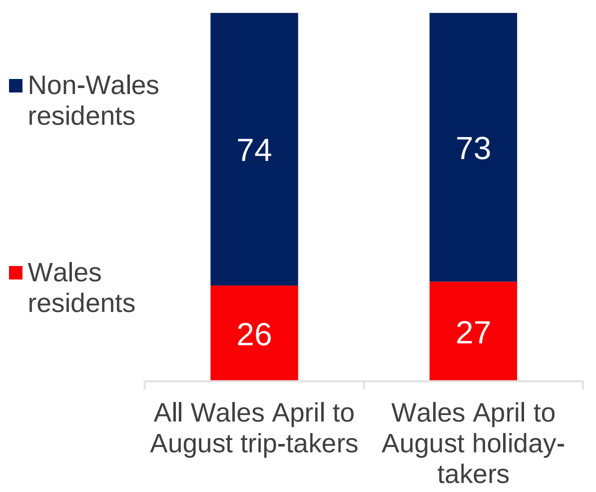


Figure 12. Breakdown of Wales trip-takers by region of residence, Percentage Waves 38-39, U.K.

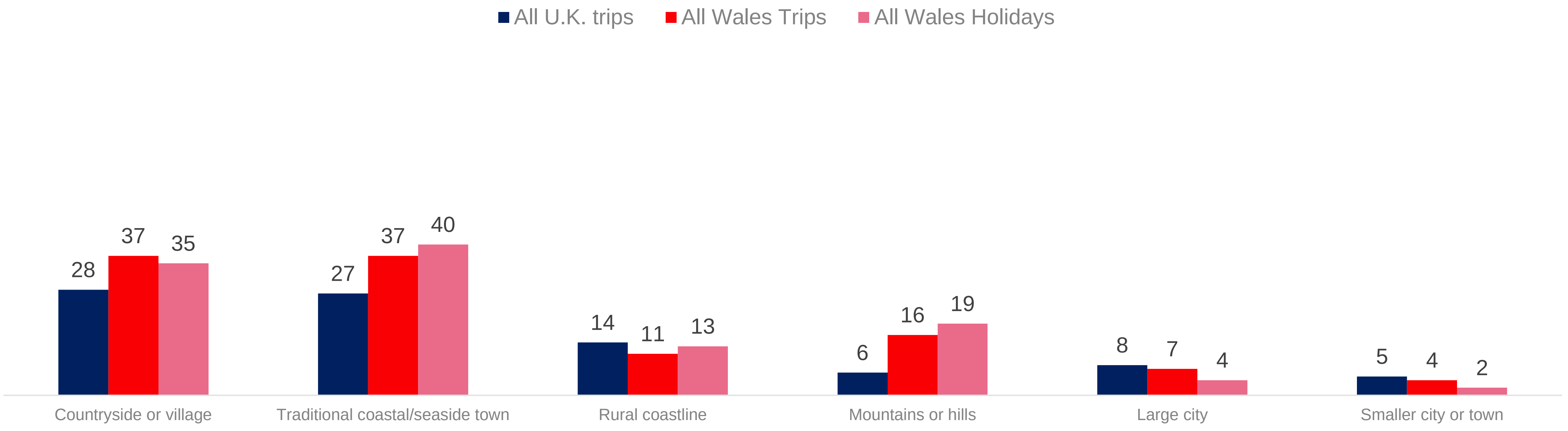


VB13c. Where in the U.K. did you stay on this trip from April to August?
Base: All residents that have taken a holiday or short break in the U.K. since April. Residents in each region Wales n=161, East of England n=154; East Mids n=91; North East n=56; North West n=146; South East n=149; South West n=112; West Mids n=129; Yorkshire and The Humber n=119;London n=189; Scotland n=209. All April to August trip takers to Wales n=151; April to August holiday takers to Wales n=101

Types of location of trips taken since April 2021

- 'Countryside or village' and 'traditional coastal/seaside town' were the two leading destination types for an overnight trip to Wales between April and August, both of which index significantly above all U.K. trips. When looking solely at trips taken for a holiday, 'traditional coastal/seaside town' was the number one destination type for Wales trips at 40%, rising to 42% in the July/August period.
- Compared to the equivalent period in 2020, July/August this year saw significantly higher 'traditional coastal/seaside town' stays.
- Wales overnight trips and holidays were significantly more likely than U.K. trips to have been taken in 'mountains or hills'.
- The vast majority of U.K. and Wales trip-takers were able to take the trip they originally planned to take. Of those that were unable to, limited available accommodation was the leading barrier.

Figure 13. Main type of destination for Wales April to August overnight trip, Percentage Waves 38-39, U.K.



VB13d. Which of the following best describes the main type of destination you stayed in during your trip from April to August? Base: All UK trips n=1,445; All respondents that took a trip exclusively to Wales since April All Wales trips n=126; Wales holidays n=87

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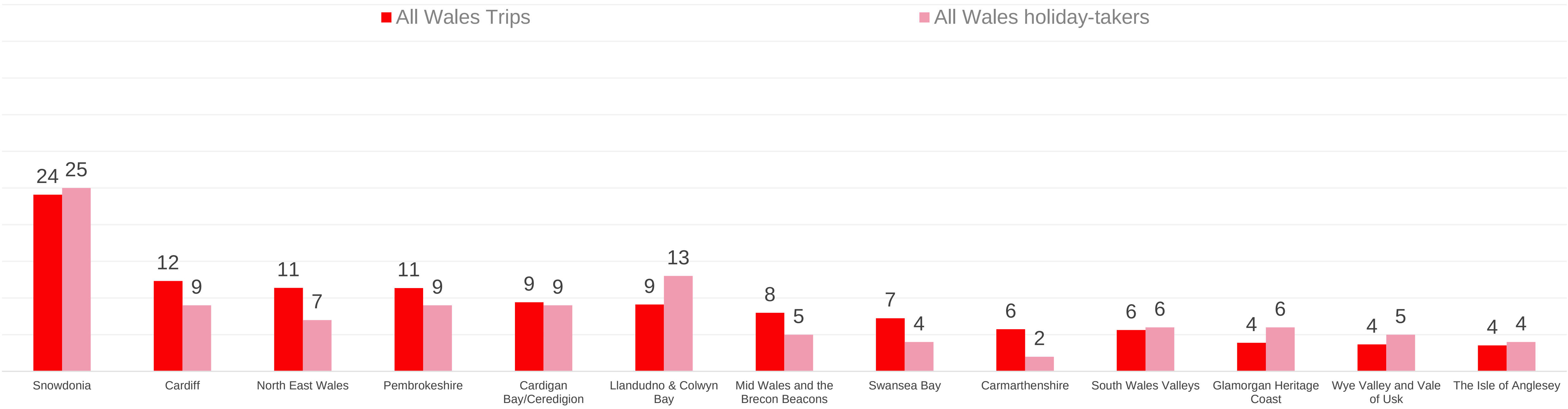
Where Wales trip-takers visited in Wales

- Trip-takers to Wales are most likely to have stayed in Snowdonia, followed by Cardiff, North East Wales and Pembrokeshire.
- Snowdonia and 'Llandudno and Colwyn Bay' each index higher amongst Wales holiday-takers.

Figure 14. Areas of Wales visited on trip from April to August, Percentage Waves 38-39, U.K. and Wales



VB13cii. Where specifically in these areas did you stay?
Base: All respondents that took a trip to Wales since April All Wales trips n=142; Wales holidays n=94

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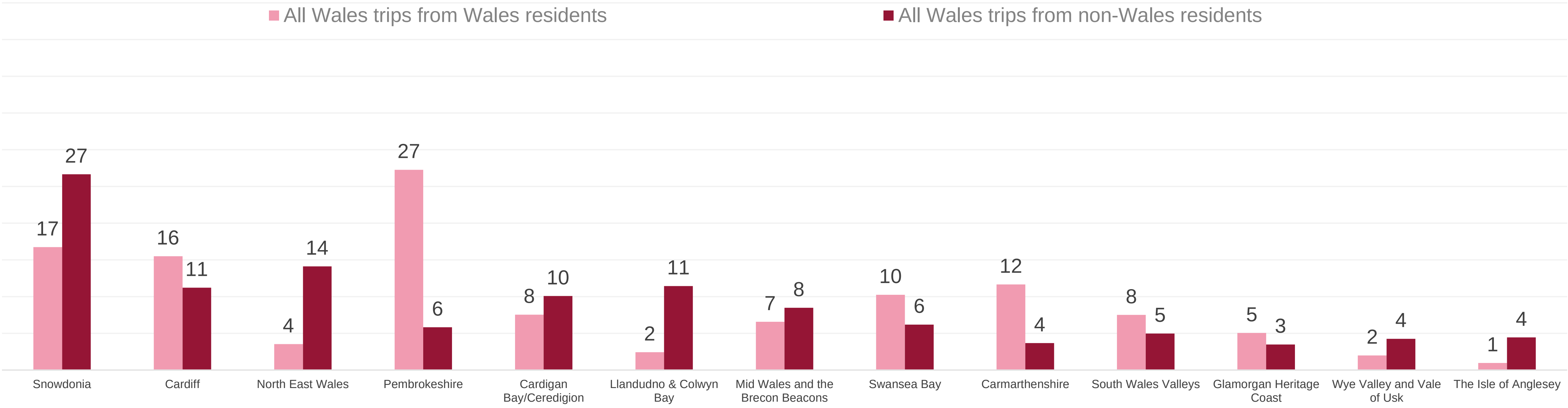
Where Wales trip-takers visited in Wales

- There are notable differences in the destination of choice between Wales resident trip-takers and non-Wales resident trip-takers on their overnight trip. Wales resident trip-takers are significantly more likely to take trips to West Wales – in particular Pembrokeshire and Carmarthenshire. Non-Wales-resident trip-takers index higher for North Wales – in particular Snowdonia, North East Wales and Llandudno and Colwyn Bay. The differences will in part be driven by the concentration of Wales residents in South Wales, and the easier access of West Wales destinations.

Figure 15. Areas of Wales visited on trip from April to August, Percentage Waves 38-39, U.K. and Wales



VB13cii. Where specifically in these areas did you stay?
Base: All respondents that took a trip to Wales since April All Wales trips n=142; All Wales trips from Wales residents n=67; All Wales trips from non-Wales residents n=84

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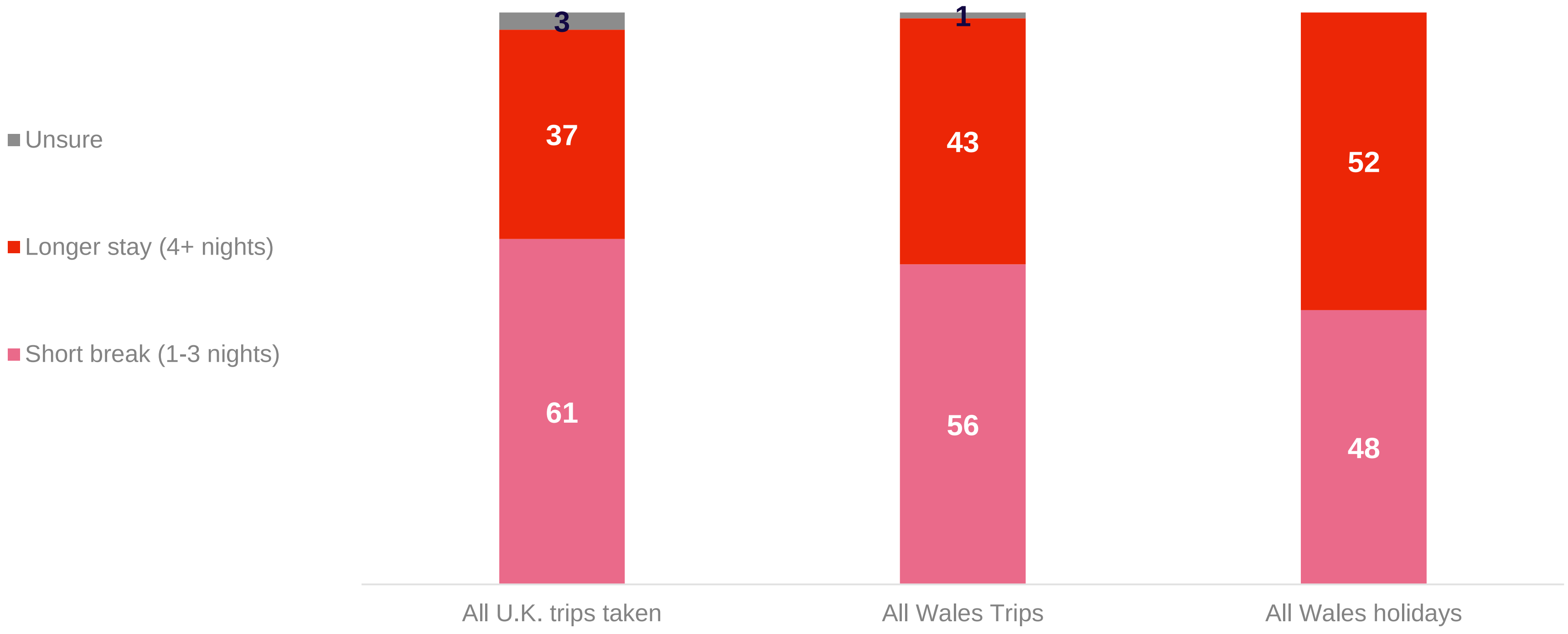
Length of trips taken since April 2021

- Broadly consistent with U.K. trips taken between April and August, Wales trips were more likely to have been short-breaks than longer stays. When looking solely at holidays however, longer breaks make up the majority. This is especially the case for holidays taken in Wales in *July/August*, which were comprised of 59% longer stays.
- Trip length was relatively consistent with July/August last year.

Figure 16. Length of Wales April to August trip, Net percentage, Waves 38-39, U.K.



VB13b. Was this trip in July a short break (1-3 nights) or a holiday (4+ nights)?
Base: All UK trips n=1,445; All respondents that took a trip exclusively to Wales since April All Wales trips n=126; Wales holidays n=87

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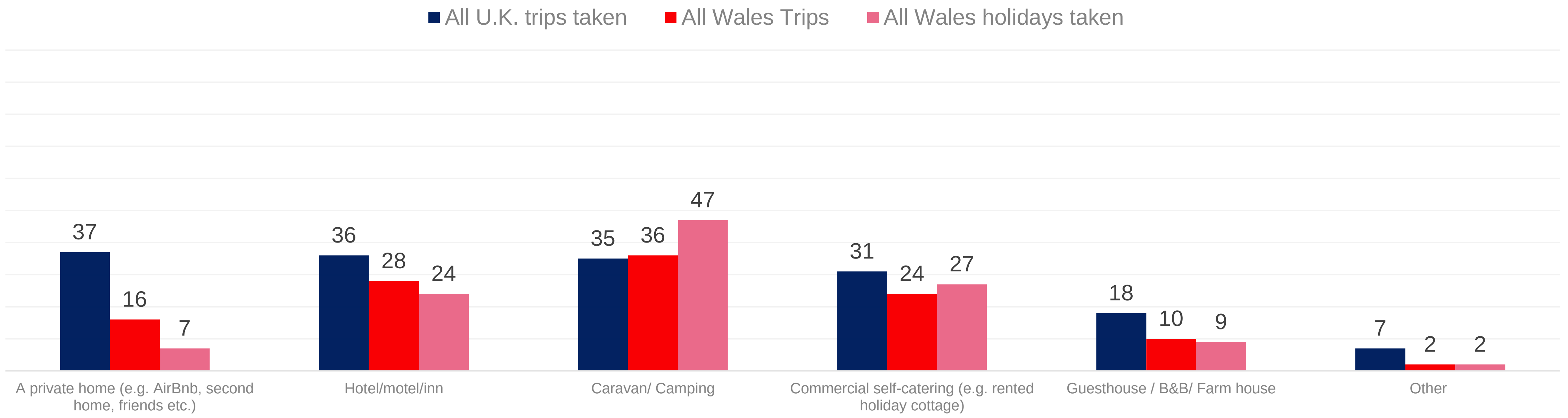
Types of accommodation used on trips taken since April 2021

- Wales trip-takers between April and August were most likely to have stayed in 'caravan/camping' accommodation, followed by 'hotel/motel/inn' and 'commercial self-catering'. Notably, stays in 'caravan/camping' make up nearly half of trips taken to Wales for a holiday purpose (11 percentage points higher than all trips), a rise that does not happen when looking at *U.K.trips* taken for a holiday purpose.
- The incidence of 'camping/caravan' stays increases in July/August, with 'hotel/motel/inn' dropping. That said, stays in a 'hotel/motel/inn' are significantly higher than in July/August 2020, reflecting higher comfort with this type of accommodation.

Figure 17. Accommodation stayed in on Wales April to August trip in Wales, Net percentage, Waves 38-39, U.K.



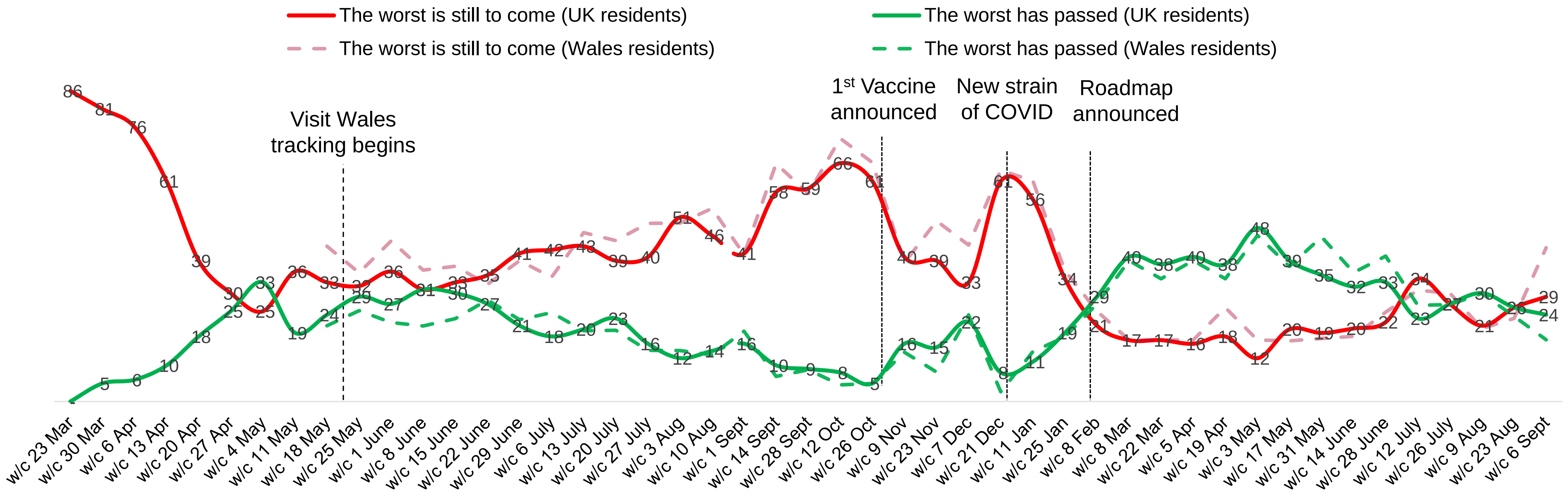
VB13f. In what type/s of accommodation did you stay in during your U.K. trip from April to August?
Base: All UK trips n=1,445; All respondents that took a trip exclusively to Wales since April All Wales trips n=126; Wales holidays n=87

National sentiment

Perceptions of the situation in relation to COVID-19

- As of early September the proportion of U.K. adults stating ‘the worst is still to come’ is higher than the proportion stating ‘the worst has passed’. After five months (from February to June) where the proportion thinking the worst has passed was significantly higher, there has been no consistent trend in the last two months, highlighting the renewed uncertainty around the future.
- Sentiment amongst Wales residents tends to track adults from across the U.K. However, the latest wave sees Wales residents significantly more pessimistic.

Figure 18. Perception of the situation with regards to COVID-19, Waves 1-39, 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

- Notably, perceptions of the situation in relation to COVID-19 remain relatively similar across life stages. This marks a departure from previous reporting periods this year, when older life stages were significantly more likely to believe the worst has passed. Lower optimism amongst these older groups may be linked to increased concerns about catching COVID-19 (see page 35).

Figure 19. Perception of the situation with regards to COVID-19, Wave 38-39, Percentage U.K. and Wales

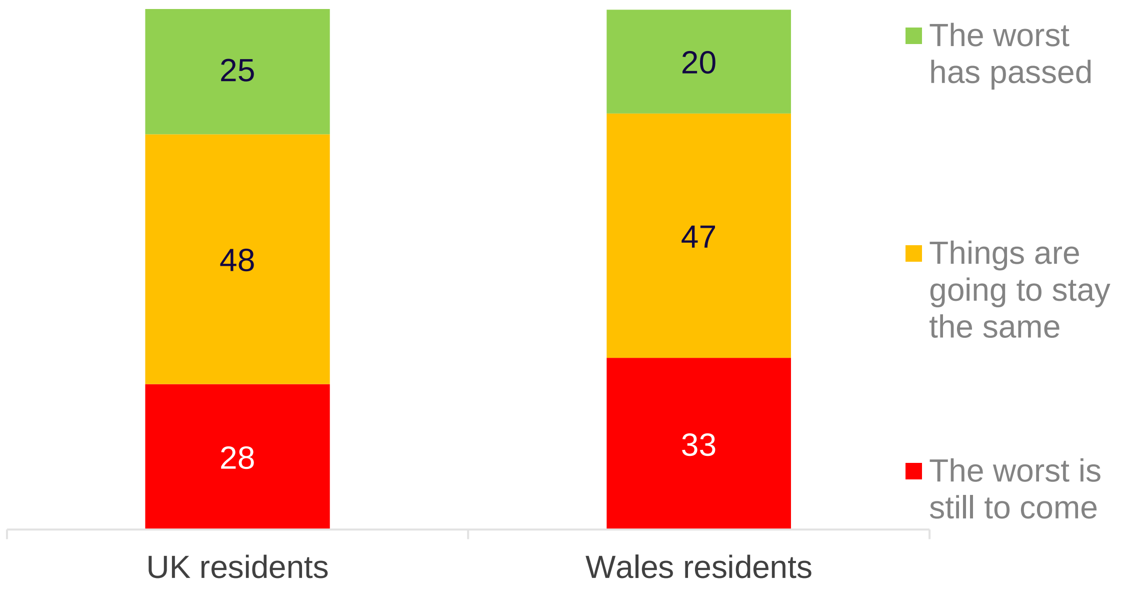
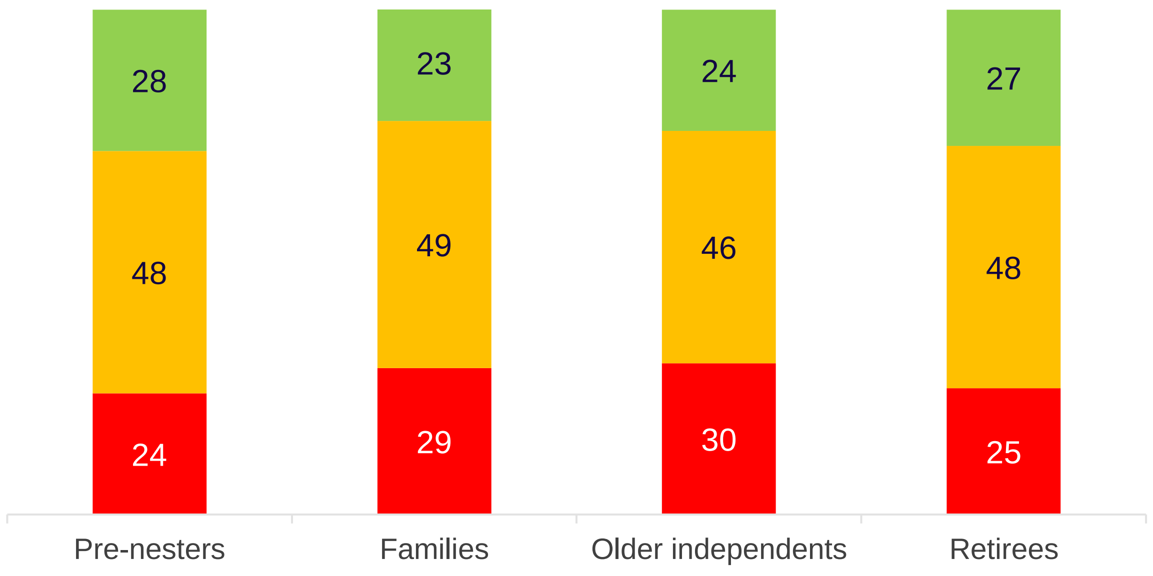


Figure 20. Perception of the situation with regards to COVID-19 by life stage, Wave 38-39, Percentage, U.K.



Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion?
Base: All U.K. respondents. n=3,520; All Wales respondents n=385; Pre-nesters n=779; Families n=1,219; Older Independents n=956; Retirees n=341

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Perceptions of when things will return to normal

- The vast majority of the U.K. population do not expect normality this year – only 1 in 7 (14%) expecting it by December and less than half by April to June 2022. Pre-nesters and families (the most 'COVID confident' groups) are the most optimistic, retirees the least. 16% now 'never' expect normality.
- Expectations of normality are consistently lower amongst Wales residents than residents from across the U.K.

Figure 21. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Waves 38-39, UK and Wales

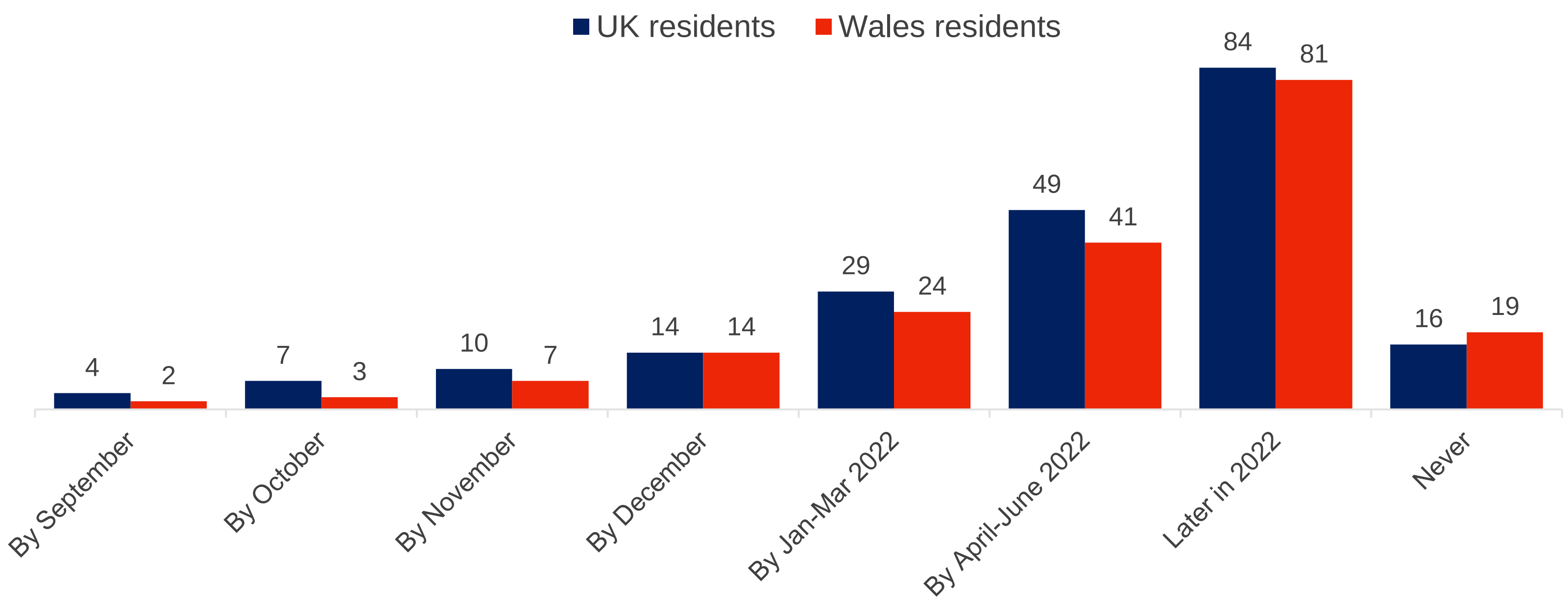

Table 1. Normality by December by sub-group

Audience	%
Pre-nesters	19%
Families	21%
Older independents	9%
Retirees	6%

Q16: Given what you know today, when do you think life will return to something close to normal?
U.K. respondents. n=3,520; All Wales respondents n=385; Pre-nesters n=779; Families n=1,219; Older Independents n=956; Retirees n=341

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Financial segments and financial impact of COVID-19

- Wales residents are significantly more likely than U.K. residents to state that they're been hit hard by COVID-19 financially (22% compared to 14%). That said, nearly half (44%) have either not been affected or are better off than before.
- Around 1 in 5 of U.K. and Wales residents of working age suffered a reduced income as a result of COVID.

Figure 22. Breakdown of residents by financial segments, Percentage, Waves 38-39, U.K. and Wales

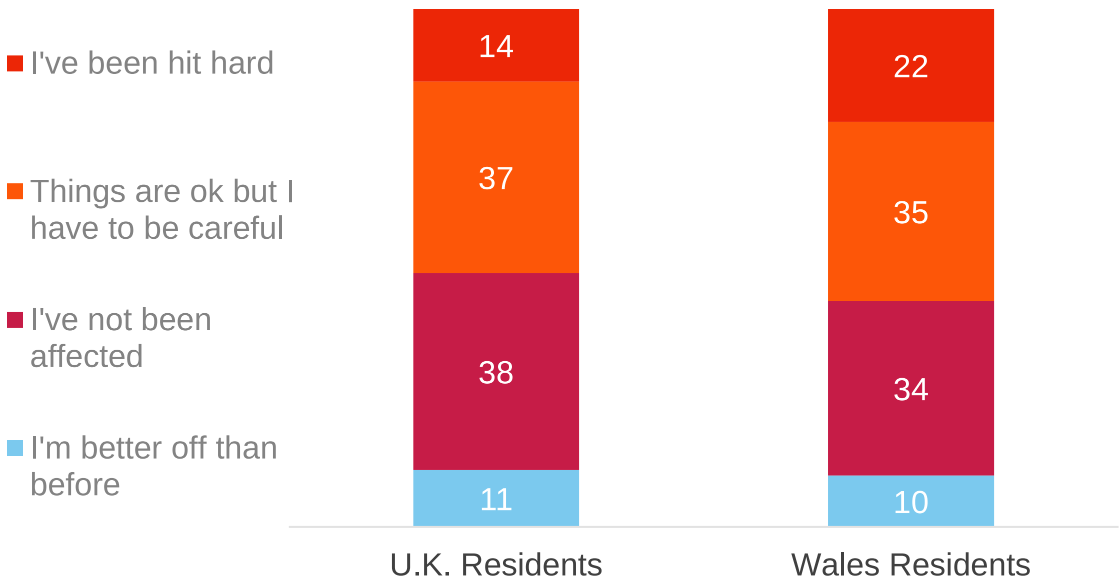
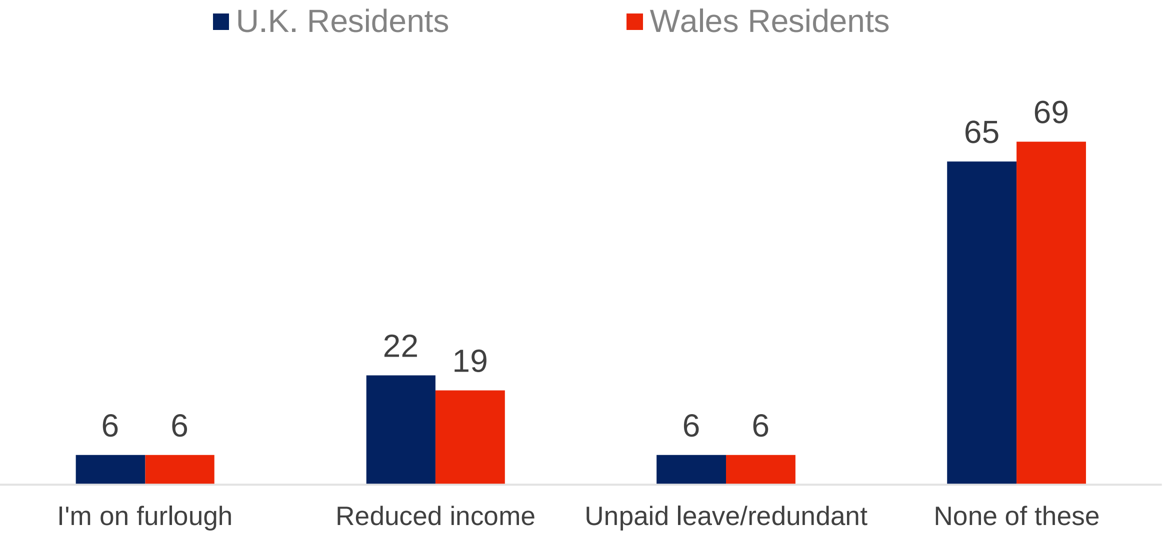


Figure 23. Employment impact of COVID-19, Percentage, Waves 38-39, U.K. and Wales of working age*



Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All U.K. respondents. n=3,520; All Wales respondents n=385 *Working age defined as under 65.

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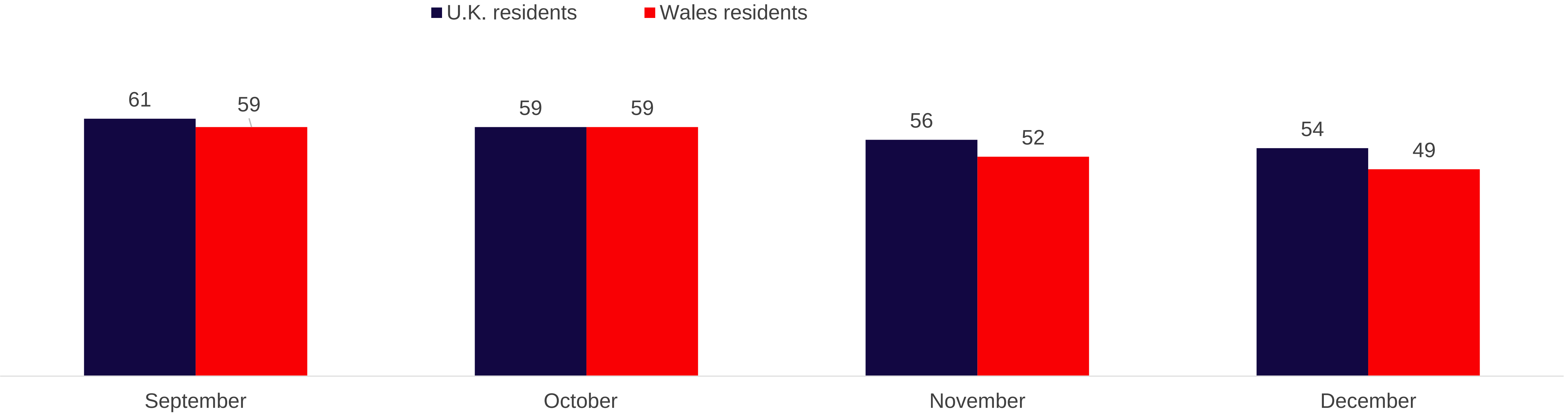
Confidence in the ability to take a U.K. short break or holiday

- 3 in 5 of the U.K. public would be confident that an overnight U.K. trip would go ahead as planned in September and October 2021. However, confidence drops to 56% in November, and 54% in December. Confidence for each month is lower than it was in the previous reporting period in June 2021.
- Consistent with lower expectations of normality, Wales residents are generally less confident than the wider U.K. population, although there is parity in trip confidence in October.

Figure 24. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Waves 38-39, U.K. and Wales

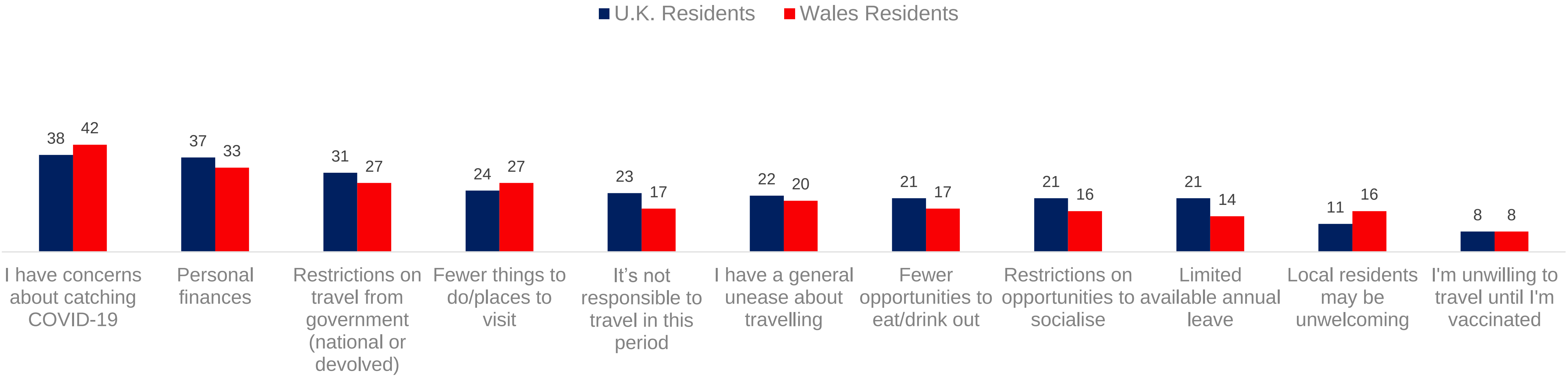


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All U.K. respondents. n=3,520; All Wales respondents n=385

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

- ‘I have concerns about catching COVID-19’ is the leading reason for not being confident about travel between September and December – the first time it has been the leading reason since the start of the year. Conversely, ‘restrictions on travel from government’ is the third most influential reason – lower placed than in previous reporting. Consistent with previous reporting, ‘personal finances’ is the second most influential reason.
- The order of reasons amongst Wales-based residents is broadly consistent with the wider U.K.

Figure 25. Reasons for not being confident about travelling between September and December, Percentage, Waves 38-39, U.K. and Wales

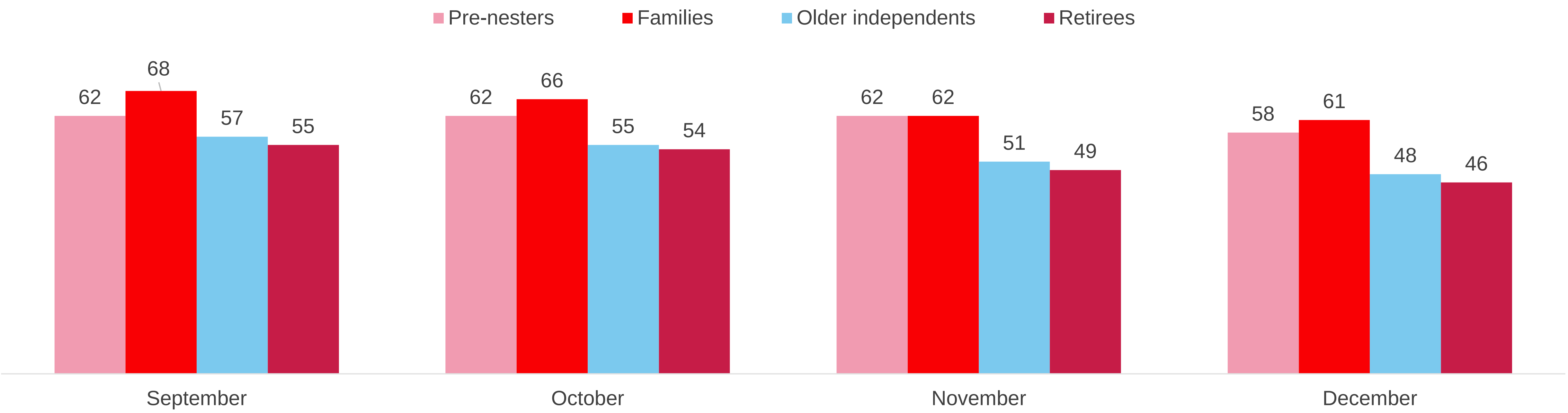


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between September and December? Base: All U.K. Respondents not confident travelling between September and December. n=1,170; All Wales respondents n=148.

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

- Consistent with all previous reporting periods, pre-nesters and families exhibit significantly higher confidence than older independents and retirees that a domestic trip would go ahead between September and December. Notably, and aligned with their pessimism around COVID-19 more generally, retirees are less confident.

Figure 26. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Waves 38-39, U.K.

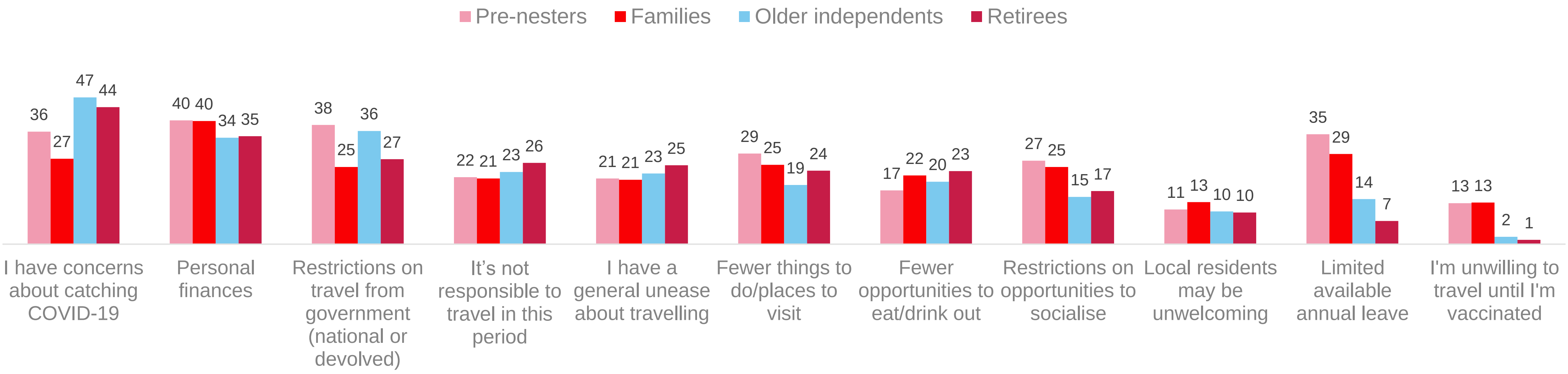


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Pre-nesters n=779; Families n=1,219; Older Independents n=956; Retirees n=341

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

- For the first time since the start of the year, older life stages are significantly more likely than younger life stages to state 'I have concerns about catching COVID-19' as a leading reason for low confidence. 47% of retirees and 44% of older independents currently cite this.
- 'Personal finances' is a leading reason for all life stages. 'Restrictions on travel from government' is a more dominant reason for 'pre-nesters' and 'older independents'. 'Pre-nesters' are also more likely to cite 'limited annual leave', 'fewer things to do/places to visit' and 'restrictions on opportunities to socialise.'

Figure 27. Reasons for not being confident about travelling from September to December, Percentage, Waves 38-39, U.K. and Wales

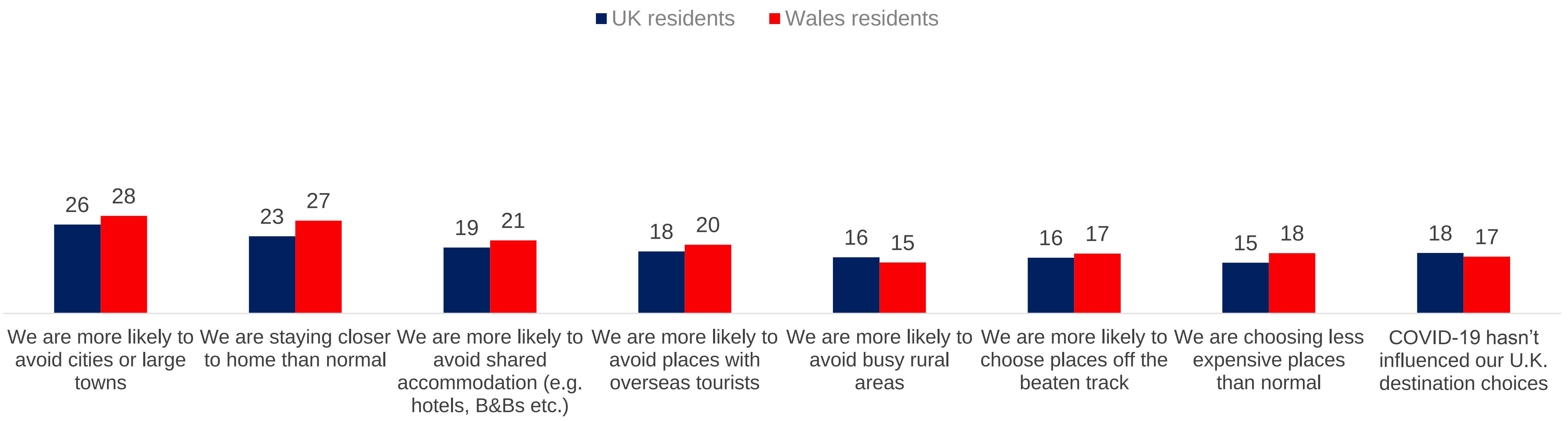


QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday between September and December? Pre-nesters n=276; Families n=406; Older Independents n=309; Retirees n=179

Impact of COVID-19 on destination choice

- When asked how COVID-19 is influencing their choice of destination for domestic trips, ‘we are more likely to avoid cities or large towns’ is the most common response. A range of other outcomes are also listed, including ‘staying closer to home than normal’ and ‘avoiding shared accommodation’. Only 1 in 5 state that COVID-19 hasn’t influenced their U.K. destination choices.

Figure 28. Impact of COVID-19 on destination choice, Percentage Waves 38-39, 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 Waves 38-39 respondents. U.K. respondents. n=3,520; All Wales respondents n=385

Upcoming trip intentions

Anticipated number of U.K. and overseas trips compared to normal

- Overall, the number of anticipated 'short breaks' and 'longer breaks of 4+ nights' amongst U.K. residents in the next six months remain below 'normal' levels – 'longer breaks' more so. This being said, anticipated UK overnight trips have now increased for two consecutive waves.
- Consistent with trips taken, there are no signs of a resurgence in overseas travel.

Figure 29. Number of U.K. overnight trips in the next 6 months compared to normal, Net 'More minus fewer', Wave-on-wave, UK

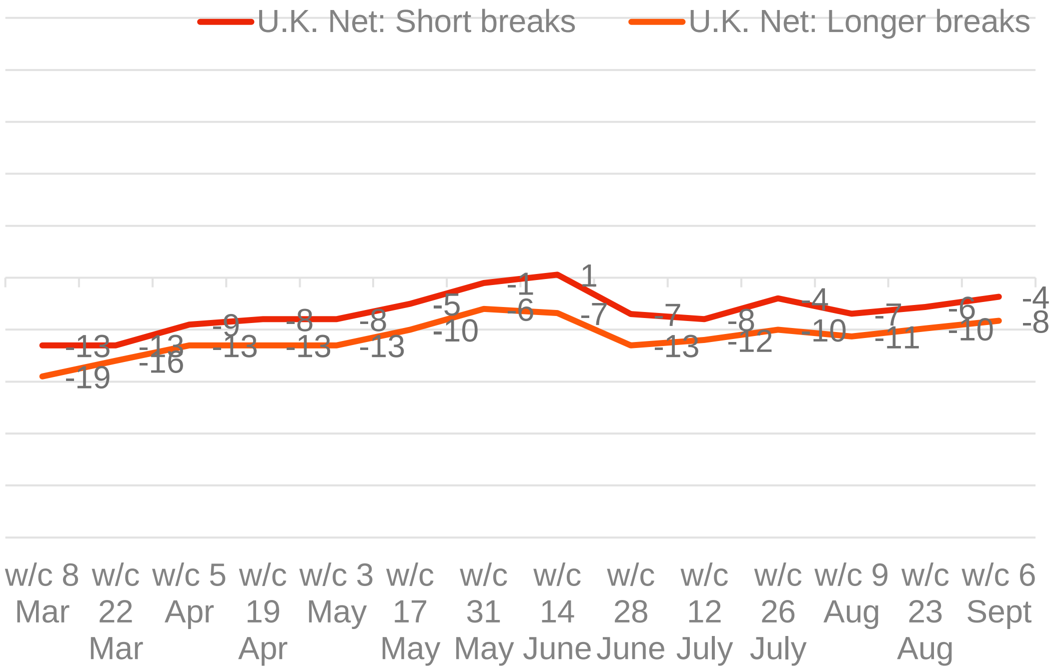
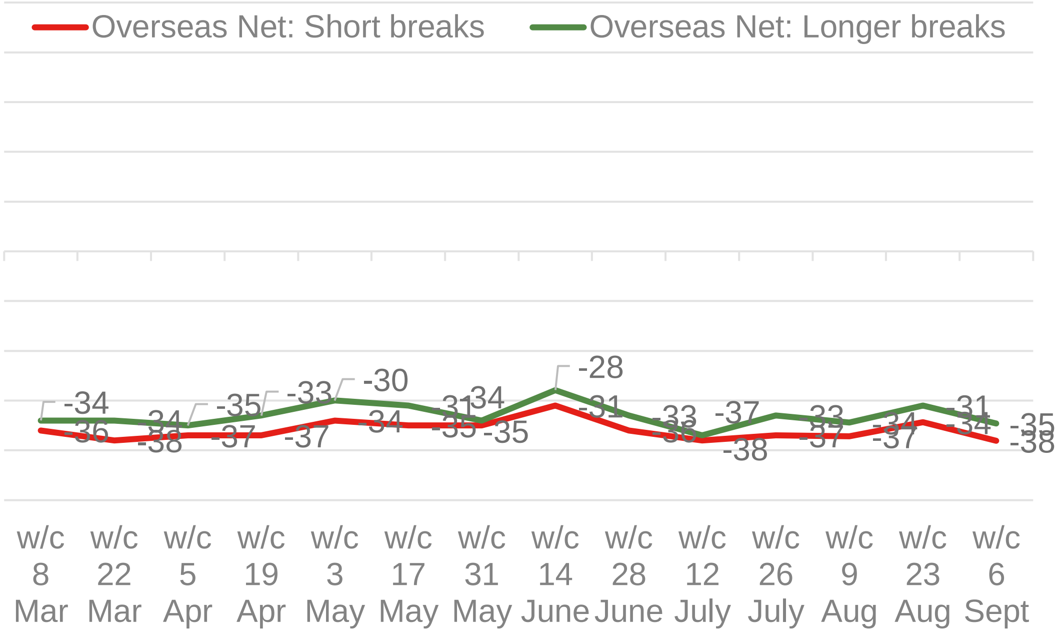


Figure 30. Number of OVERSEAS overnight trips in the next 6 months compared to normal, Net 'More minus fewer', Wave-on-wave, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks in the next six months? U.K. respondents. n=c.1,750.

Anticipated number of U.K. trips compared to normal

- In line with higher pessimism around the future, Wales residents anticipate taking fewer U.K. short breaks and longer breaks than the wider U.K. population in the next six months. This pattern is consistent when looking at Waves 38 and 39 separately, as well as netted together.
- A significant proportion of U.K. and Wales residents 'don't know' about their trip plans in the next six months, underlining continued uncertainty around travel.

Figure 31. Number of U.K. short breaks (1-3 nights) in the next six months compared to normal, Percentage Waves 37-38, U.K. and Wales

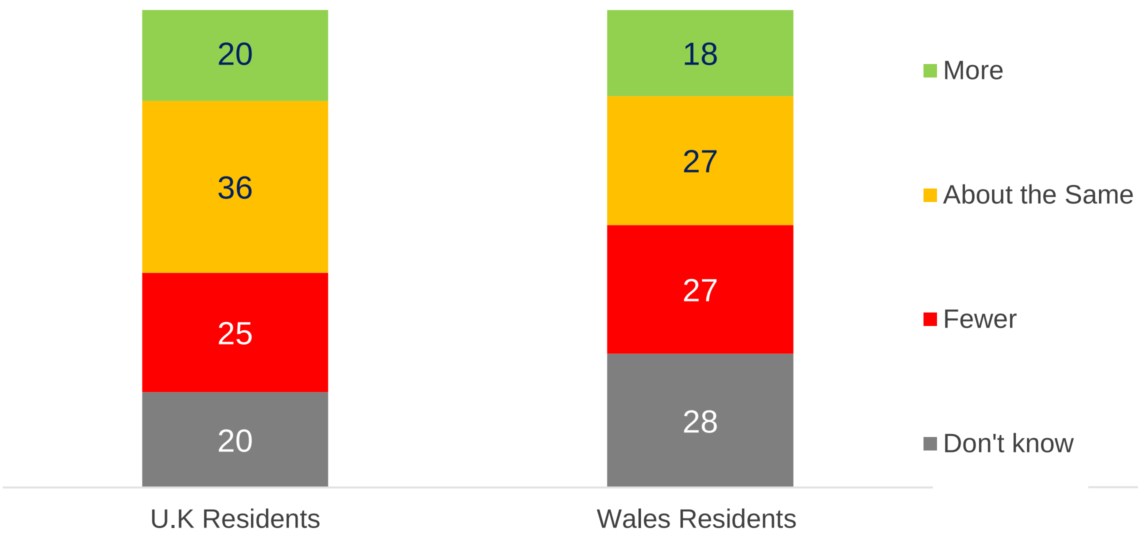
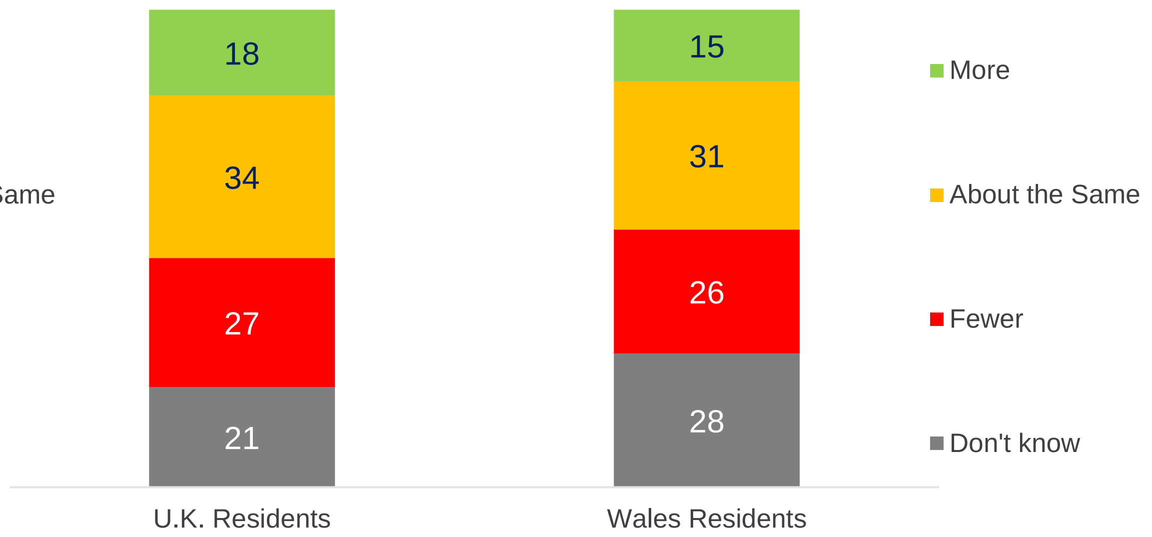


Figure 32. Number of U.K. holidays (4+ nights) in the next six months compared to normal, Percentage Waves 37-38, U.K. and Wales



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks in the next six months? Base: All U.K. respondents. n=3,520; All Wales respondents n=385

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BVA BDRC

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

- 3 in 10 (31%) U.K. residents and a similar proportion (29%) of Wales residents are planning on taking an overnight domestic trip between September and December. The highest proportion of overnight trips amongst U.K. residents is likely to be in October – September the highest for Wales residents. In the event of overseas travel restrictions being lifted, the vast majority of September to December intenders would take their U.K. overnight trip as planned.
- A consistent 3 in 10 of both U.K. and Wales residents don't intend to take a trip at all.
- Trip intentions are significantly higher than the equivalent period in 2020.

Figure 33. Proportion anticipating going on <u>any</u> overnight UK trips, percentage Wave 39, UK

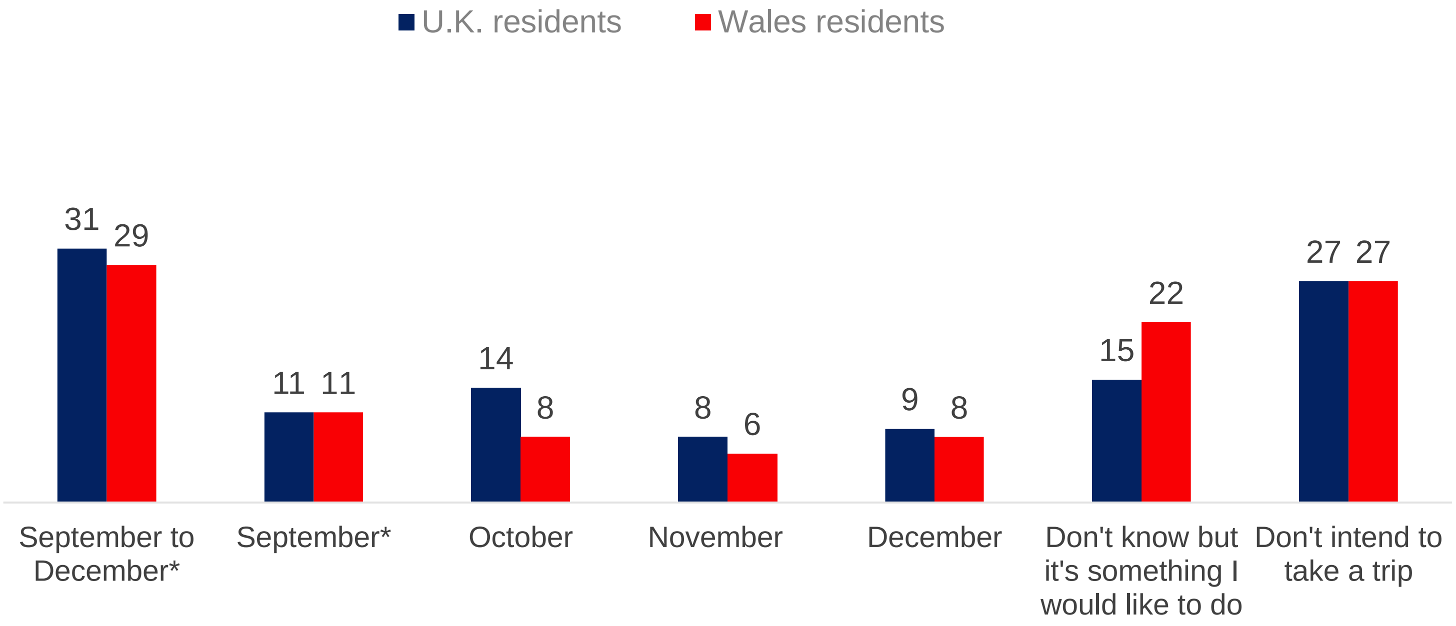
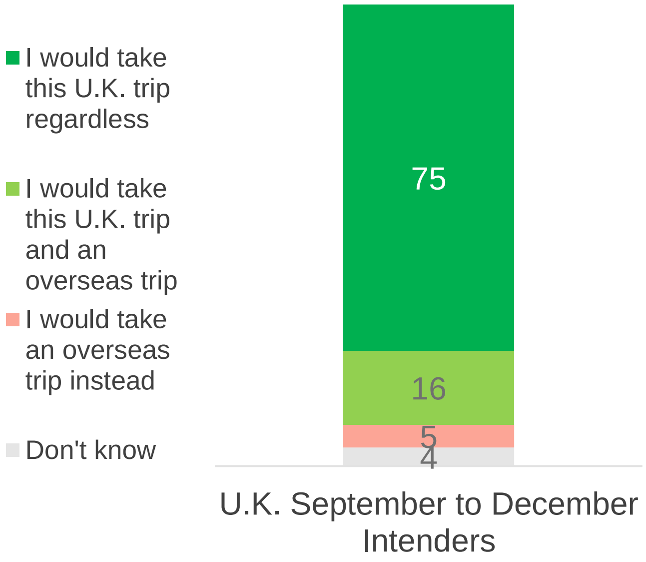


Figure 34. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Waves 38-39, UK



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 38-39 U.K. respondents. n=c.1,750. All Wales respondents n=c.200; VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your planned overnight trip in the UK during <<insert month>>? September to December intenders n=869
*Note: Fieldwork for figure 33 took place between 6th September and 10th September so September projections will not include trips already taken. These figures are therefore likely to under-count actual September trips taken

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Proportion anticipating an overnight trip in September to December

- Intention to take an overnight trip between September and December falls with age – pre-nesters the most likely to do so, retirees the least likely. The drop-off in age is driven by 'older life stages' less likely to take trips in November and December, perhaps reflecting concerns about 'catching the virus'. Although the drop-off is not to the extent reported during 2020, it does mark a slight shift from the majority of reporting during 2021
- In the event of overseas travel restrictions being lifted, 'retirees and 'older independents' are the most likely to take their planned U.K. trip. Younger life stages are also likely to take their U.K. trip, but would take an overseas trip as well.

Figure 35. Proportion anticipating an overnight U.K. trip in September to December by life stage, Percentage, Waves 38-39, U.K.

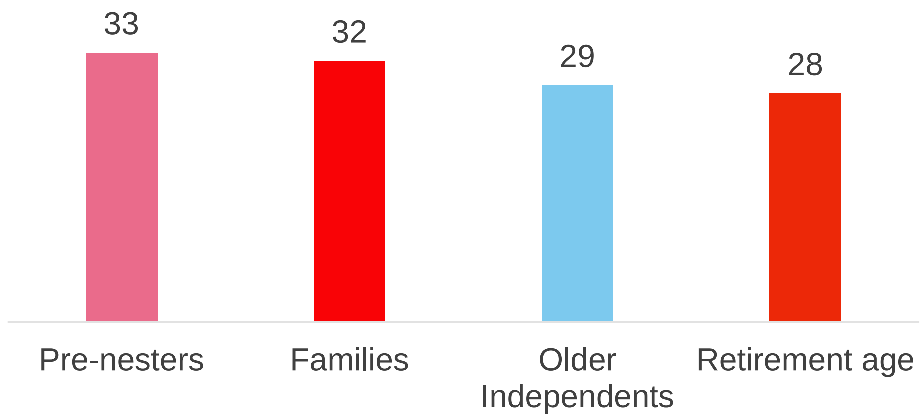
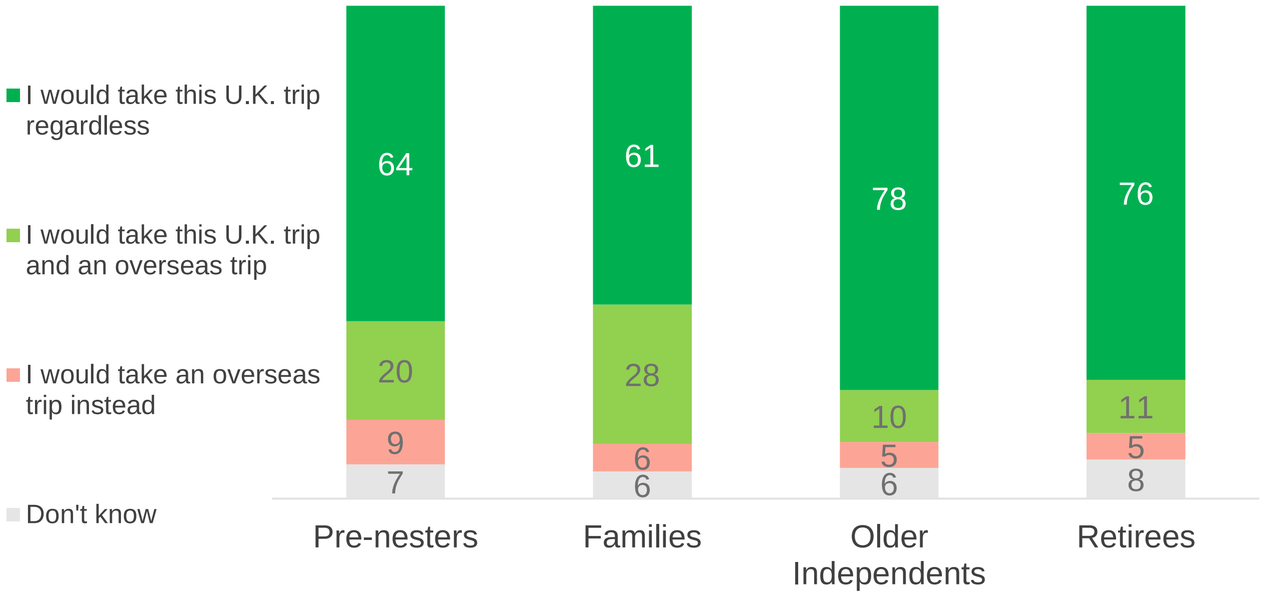


Figure 36. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Waves 38-39, UK



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=779; Families n=1,219; Older Independents n=956; Retirees n=341; VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your planned overnight trip in the UK during <<insert month>>? Pre-nesters n=201; Families n=304; Older Independents n=227; Retirees n=137

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Whether planned or booked holiday or short break yet

- Over half (51%) of September to December intenders have already planned their U.K. trip with over a third (39%) having booked it.
- Generally, intenders are planning their September to December trips further from the date than normal and booking significantly closer than normal.

Figure 37. Proportion of September to December intenders that have already planned and booked their trip , Percentage Wave 39, U.K.

Figure 38. Planning and booking lead times for September to December trips compared to normal, Percentage Waves 38-39, 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? September to December U.K. intenders: Wave 39 n=406 VB6diic. Compared to normal, when did or will you plan and book your next UK trip?

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Whether planned or booked holiday or short break yet

- Retirees planning on a U.K. trip between September and December are more likely to have already booked their trip than other life stages. That said, all life stages are tending to book their trips closer to the date than normal. Notably, retirees and older independents are the only life stages also planning their trips closer to normal, perhaps reflecting their lower travel confidence.

Figure 39. Proportion of September to December intenders that have already planned their trip , Percentage Wave 39, U.K.

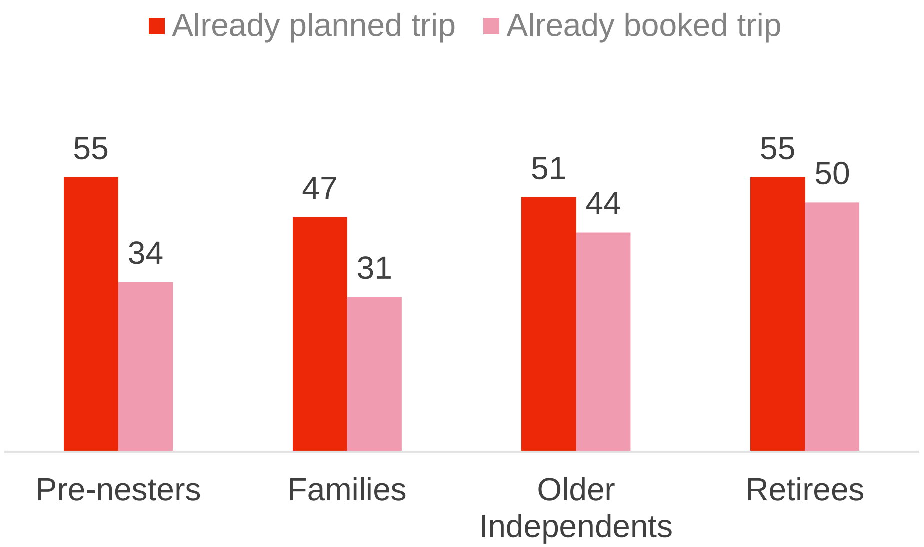
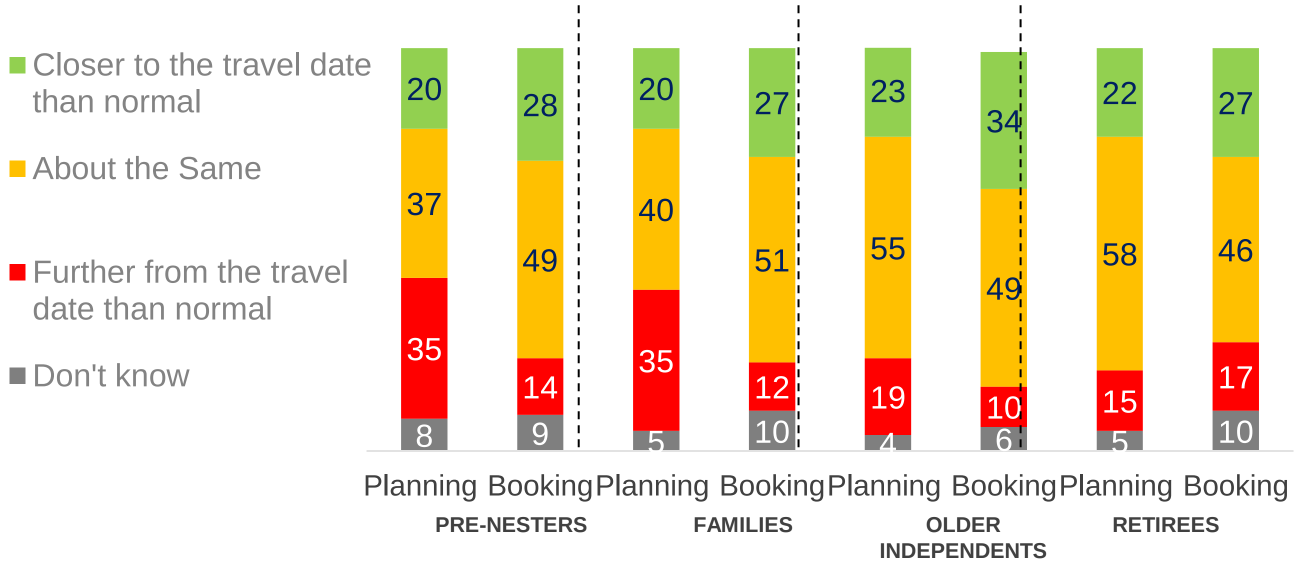


Figure 40. Planning and booking lead times for September to December trips compared to normal, Percentage Waves 38-39, U.K.



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? September to December U.K. intenders: Pre-nesters n=92; Families n=151; Older Independents n=100; Retirees n=63; VB6diic. Compared to normal, when did or will you plan and book your next UK trip? Pre-nesters n=201; Families n=304; Older Independents n=227; Retirees n=137

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Whether planned or booked holiday or short break yet

- Retirees planning on a U.K. trip between September and December are more likely to have already booked their trip than other life stages. That said, all life stages are tending to book their trips closer to the date than normal. Notably, retirees and older independents are the only life stages also planning their trips closer to normal, perhaps reflecting their lower travel confidence.

Figure 39. Proportion of September to December intenders that have already planned their trip , Percentage Wave 39, U.K.

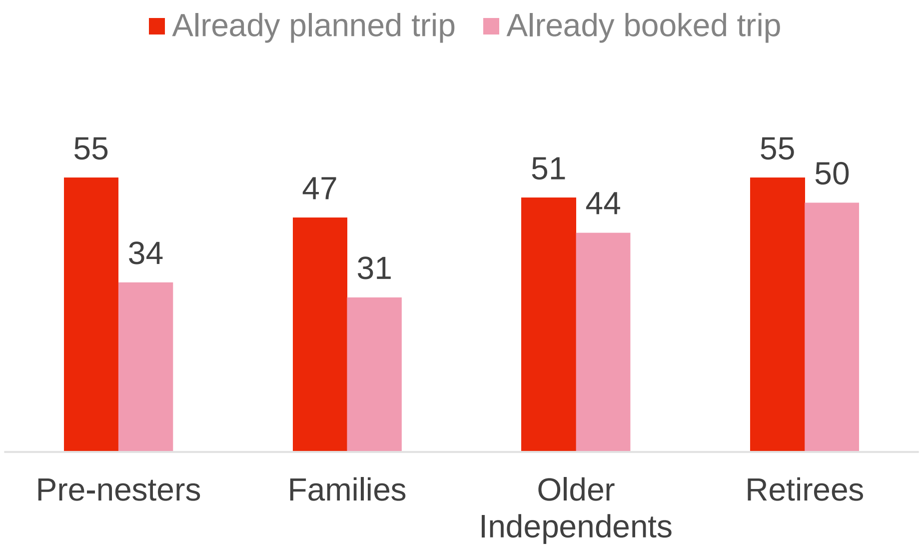
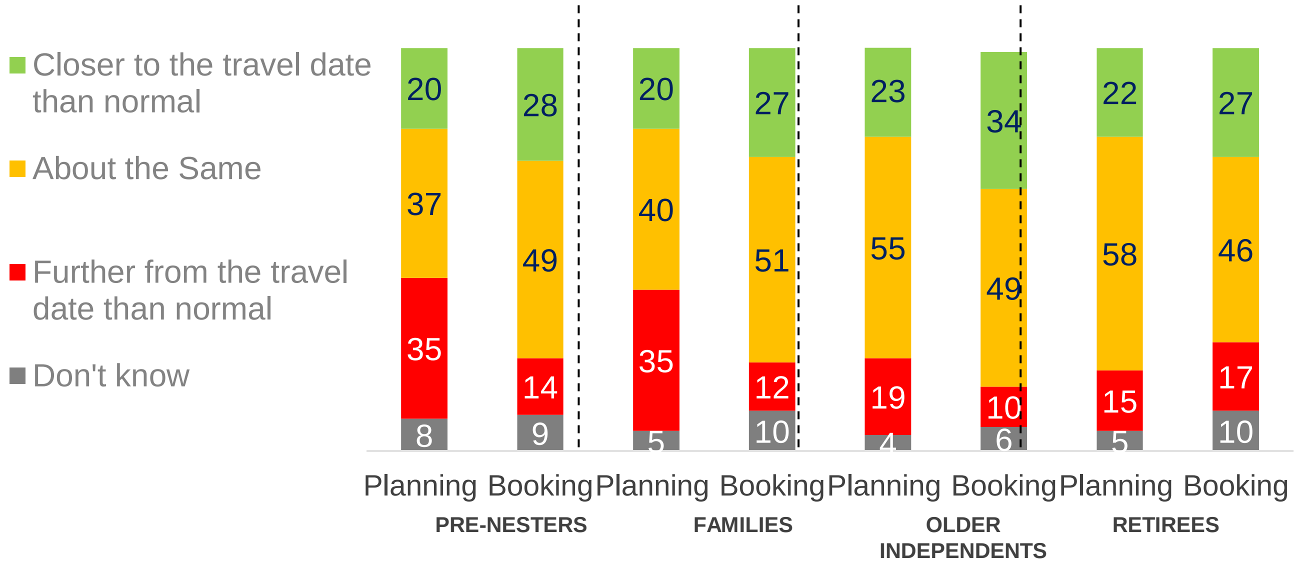


Figure 40. Planning and booking lead times for September to December trips compared to normal, Percentage Waves 38-39, U.K.



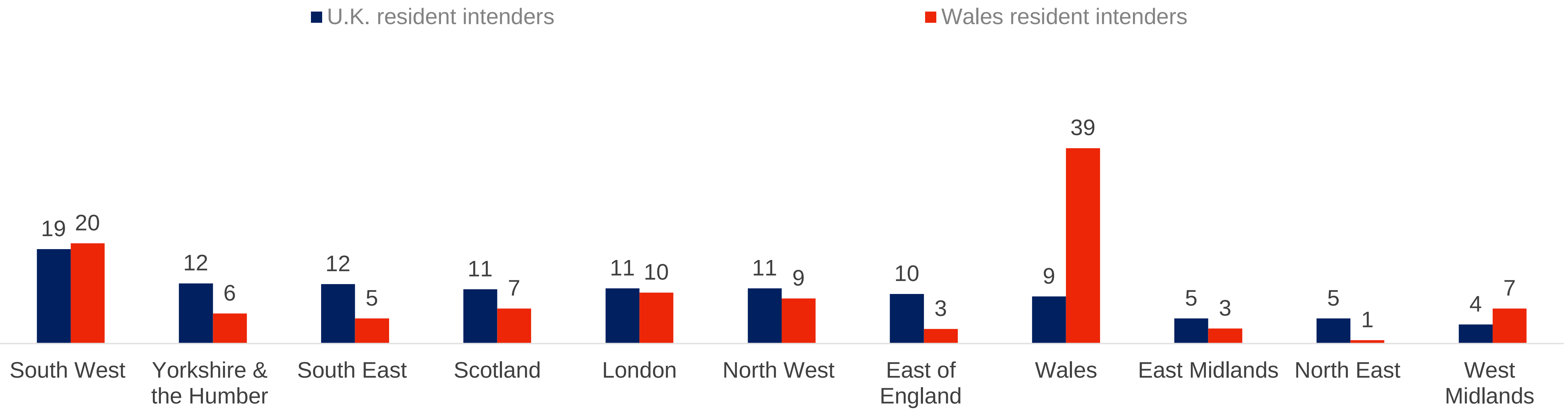
QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? September to December U.K. intenders: Pre-nesters n=92; Families n=151; Older Independents n=100; Retirees n=63; VB6diic. Compared to normal, when did or will you plan and book your next UK trip? Pre-nesters n=201; Families n=304; Older Independents n=227; Retirees n=137

Profiling September to December overnight trips to Wales

Where planning on staying on next U.K. trip in September to December 2021

- Continuing a trend since the start of this research in May 2020, the South West of England is the most popular region of the U.K. for an overnight short break or holiday, 19% of September to December intenders intending to go there. Yorkshire & The Humber is the next most popular at 12%, followed by the South East (also at 12%). 9% of September to December intenders plan on going to Wales, consistent across each month within the period.
- 39% of Wales resident intenders are planning on taking an overnight trip in Wales.

Figure 41. Where planning on staying on next U.K. overnight trip in September to December, Percentage, Waves 37-39, 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 September to December U.K. Intenders n=1,457, Wales Resident Intenders n=154

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Intention to visit Wales by region of residence

- Over 2 in 5 Wales resident intenders 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 England and the West Midlands indexing the highest.

Figure 42. Intention to take a trip to Wales by region of residence, Percentage, Waves 37-39, U.K.

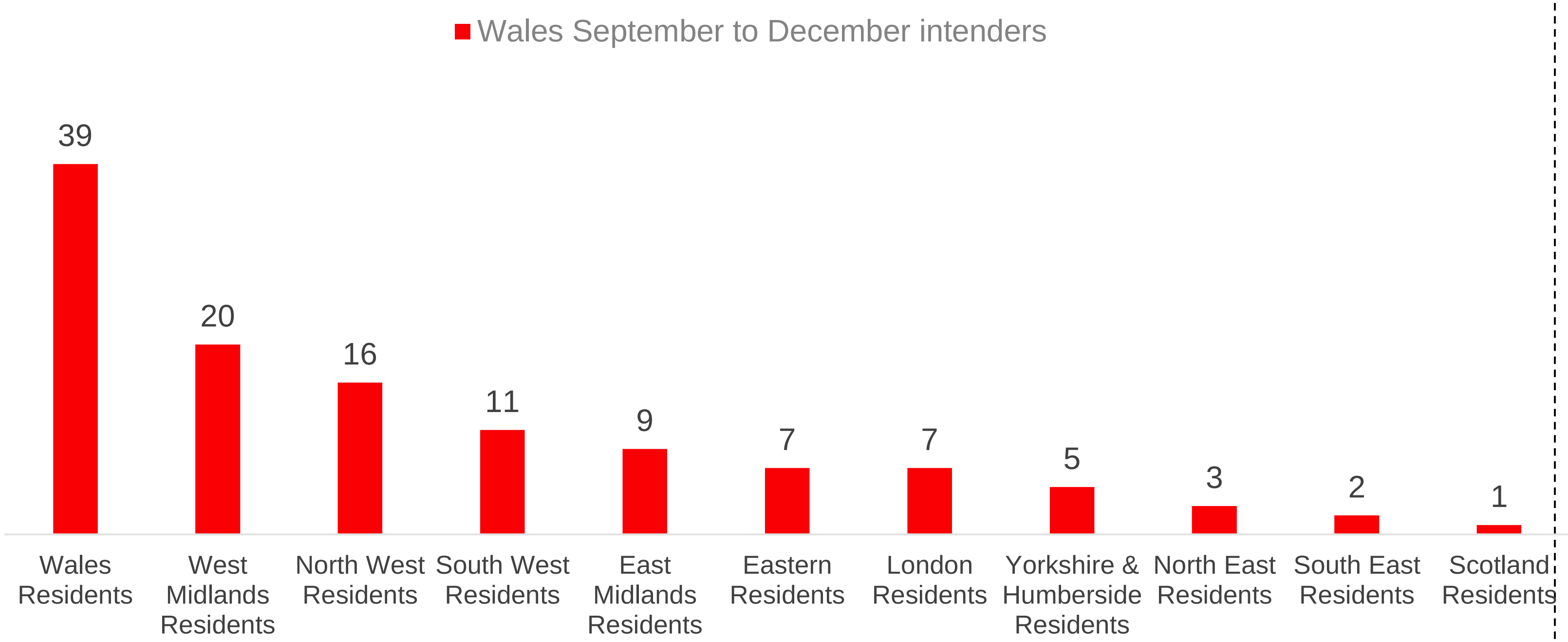
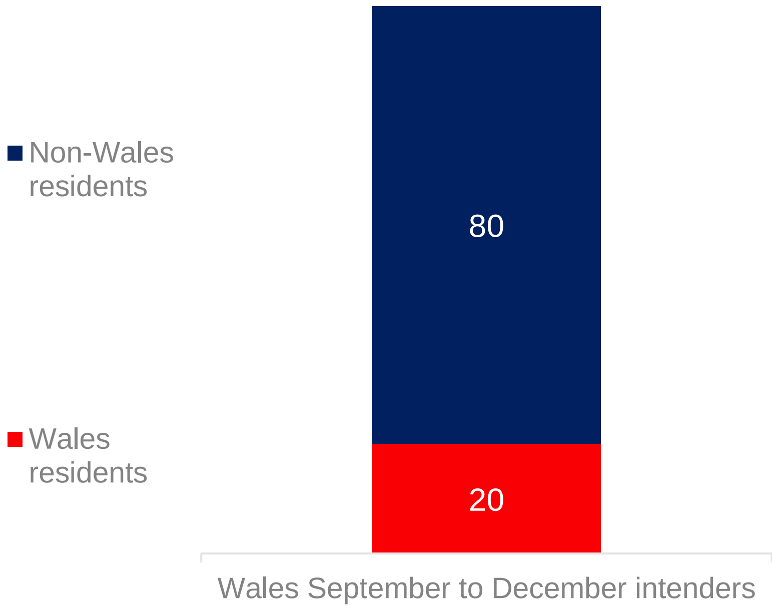


Figure 43. Breakdown of Wales intenders by region of residence, Percentage, Waves 37-39, U.K.



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 September to December. Residents in each region Wales n=154, East of England n=78; East Mids n=78; North East n=41*; North West n=131; South East n=162; South West n=103; West Mids n=96; Yorkshire and The Humber n=122;London n=165; Scotland n=195. Wales September to December intenders n=150

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Demographics of Wales intenders compared to general population

- The demographic profile of U.K. September to December intenders is broadly similar to the U.K. population. However, similar to trip-takers since April, Wales intenders have significantly higher representation amongst retirees.
- Both U.K. and Wales intenders have a higher proportion of the social grade ABs than the wider population.

Figure 44. Breakdown of populations and intenders by life stage, Percentage Waves 37-39, U.K.

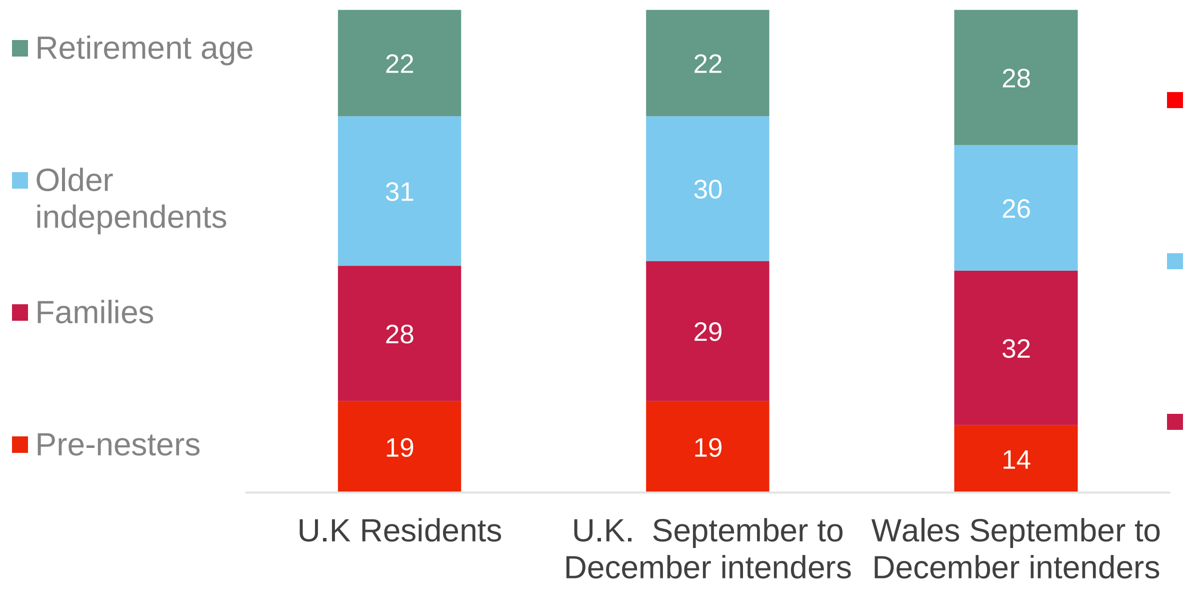
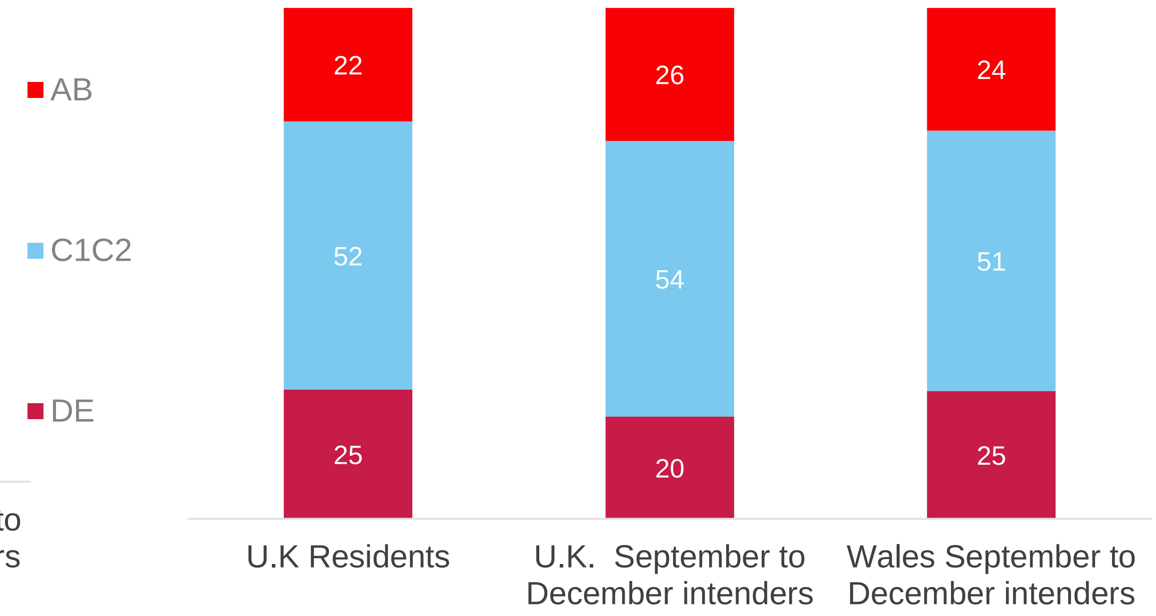


Figure 45. Breakdown of populations and intenders by social grade, Percentage Waves 37-39, U.K.

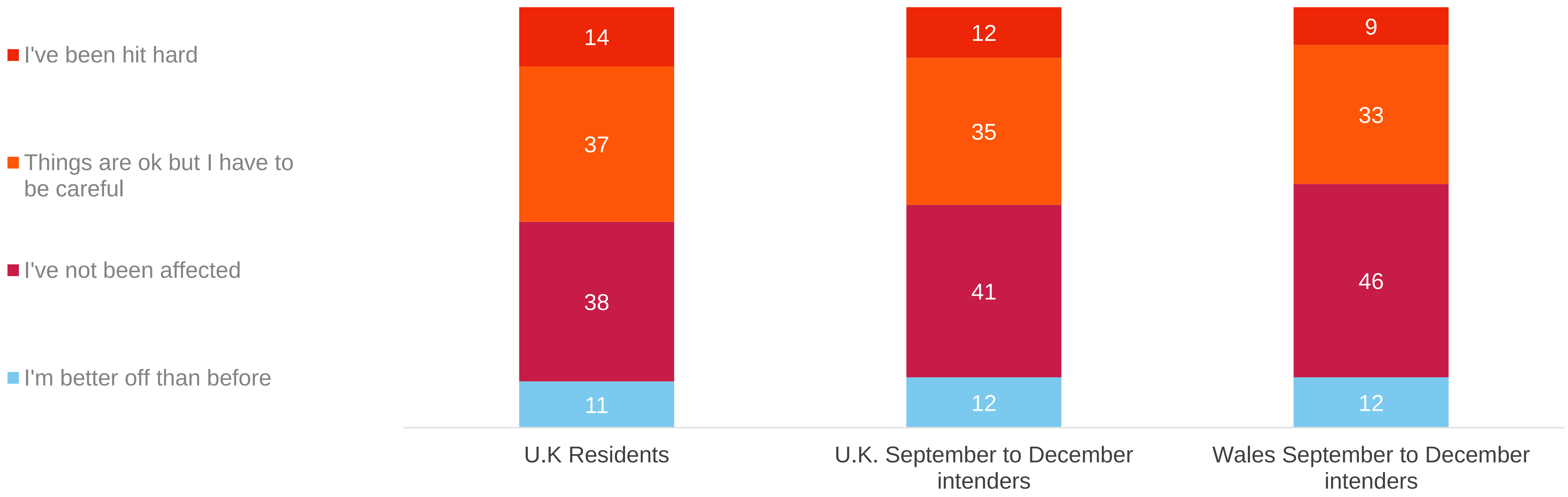


Source: Demographics. Base: All respondents. U.K. population n=5,280; U.K. September to December intenders n=1,582; Wales September to December intenders n=164

Financial segments and financial impact of COVID-19 on intenders

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

Figure 46. Breakdown of intenders by financial segments, Percentage, Waves 37-39, U.K.

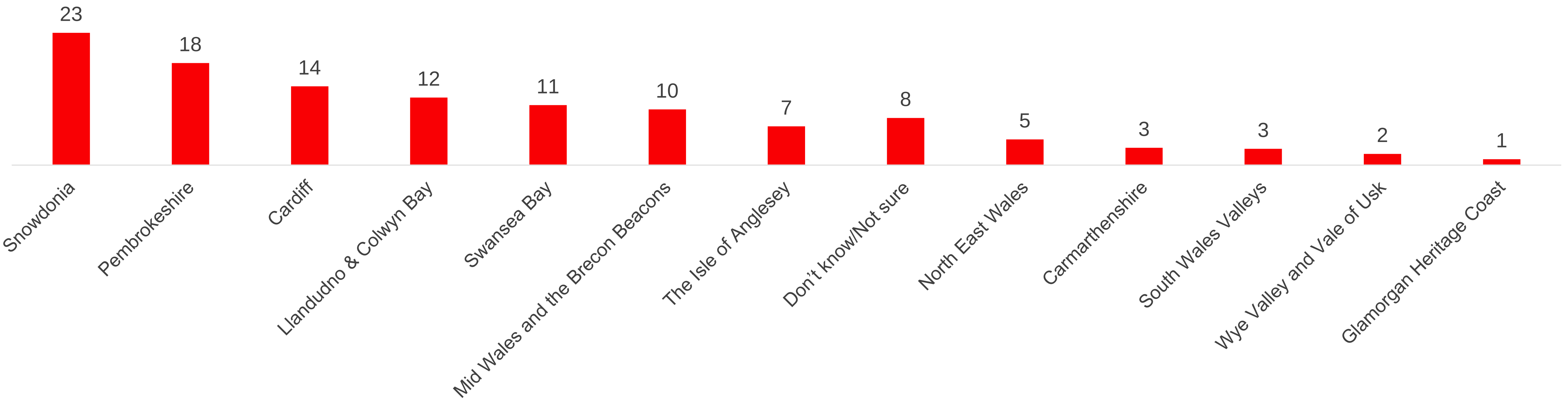


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Base: All respondents. U.K. population n=5,280; U.K. September to December intenders n=1,582; Wales September to December intenders n=164

Where planning on staying on Wales trip in September to December

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

Figure 47. Planned destination for next September to December Wales trip, Percentage Waves 37-39, 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 September to December n=164

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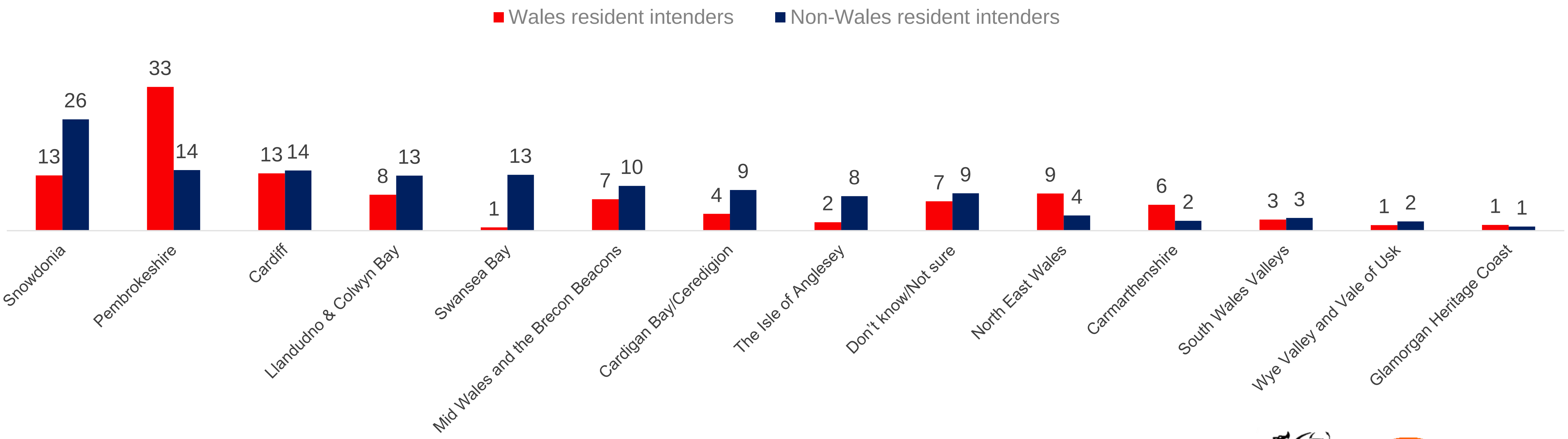
Where planning on staying on Wales trip in September to December

- Pembrokeshire is by far the most preferred destination for Wales-resident adults planning a Wales trip this September to December, generating more than twice as many intenders as Snowdonia.
- Similar to trips taken since April, non-Wales residents index significantly higher with intention for visiting North Wales destinations including Snowdonia and Llandudno and Colwyn Bay. They also index higher for trips to Cardigan Bay and Swansea Bay.

Figure 48. Planned destination for next Wales trip for <u>September to December Intenders</u> by residence, Percentage Waves 37-39, 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 September to December. All Wales resident intenders n=66; Non-Wales resident intenders n=98

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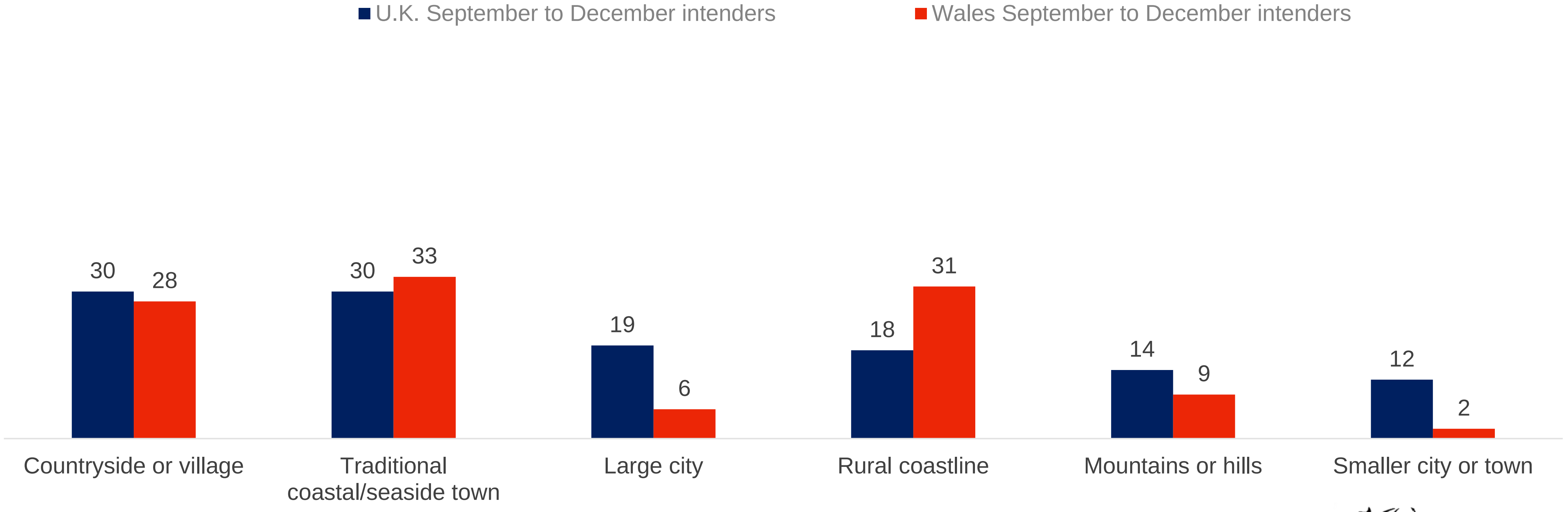
Type of destination for next U.K. short break or holiday

- ‘Traditional coastal/seaside town’, ‘rural coastline’ and ‘countryside or village’ are the three leading destination types for Wales September to December intenders this year.
- U.K. intenders are as likely as Wales intenders to be intending to visit a ‘countryside or village’ and a ‘traditional coastal/seaside town’, although are significantly less likely to be intending to visit the rural coastline and significantly *more* likely to be intending to visit a large city or smaller city or town.

Figure 49. Main type of destination for September to December intenders, Percentage Waves 37-39, 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 September to December U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122

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Trip purpose and trip length of September to December trips

- Consistent with previous reporting, the vast majority of overnight trips to Wales between September and December are likely to be for a 'holiday' purpose.
- Shorter breaks of 1-3 nights are slightly more dominant than longer breaks amongst both Wales and U.K. intenders.

Figure 50. Purpose of next September to December trip, Percentage, Waves 37-39, U.K.

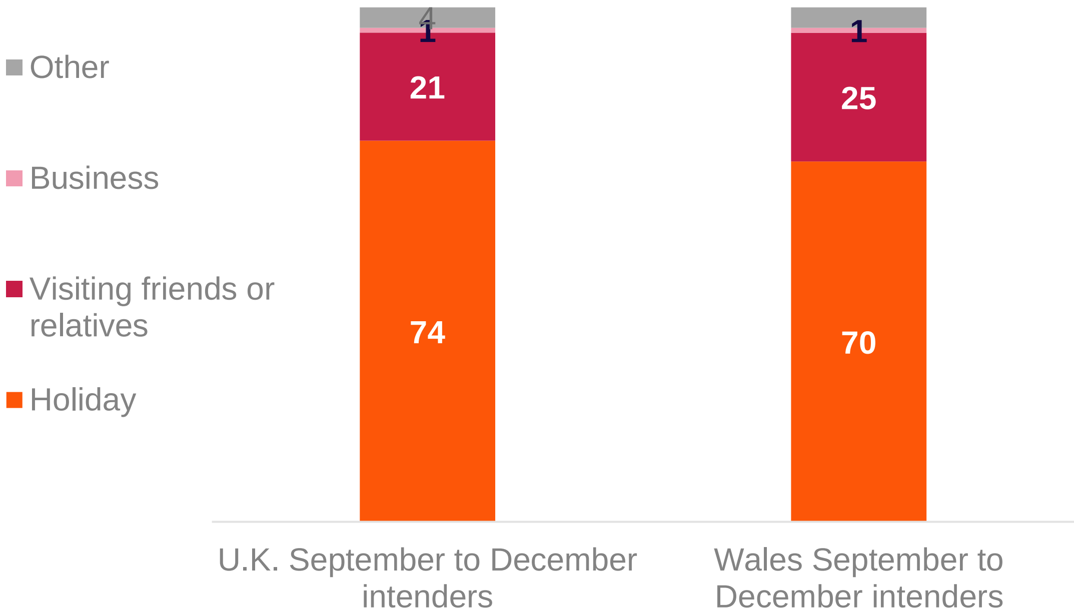
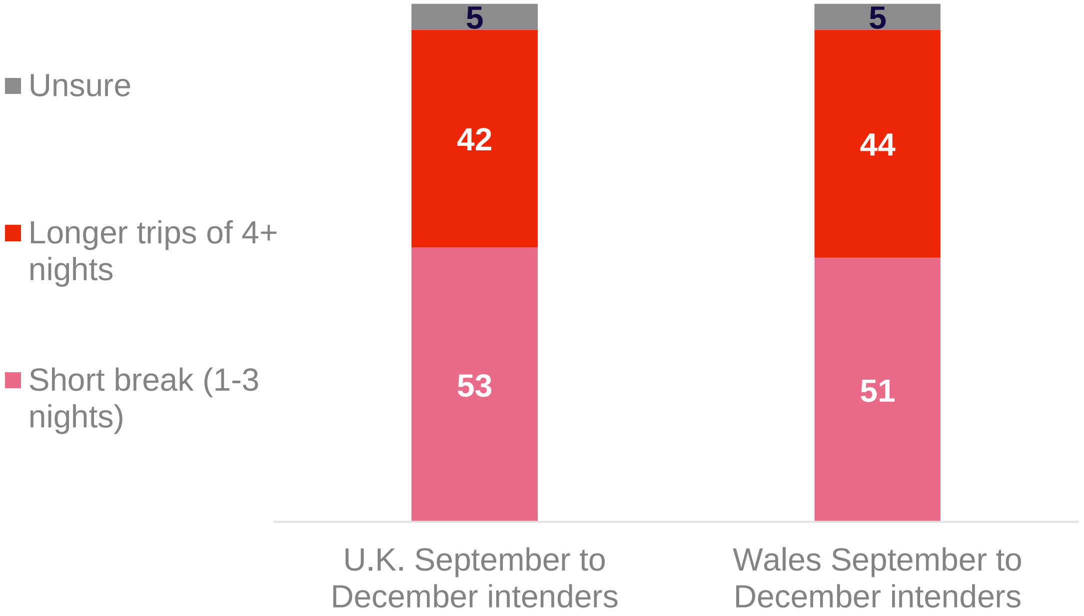


Figure 51. Length of next September to December trip, Percentage, Waves 37-39, U.K.



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 September to December. U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122

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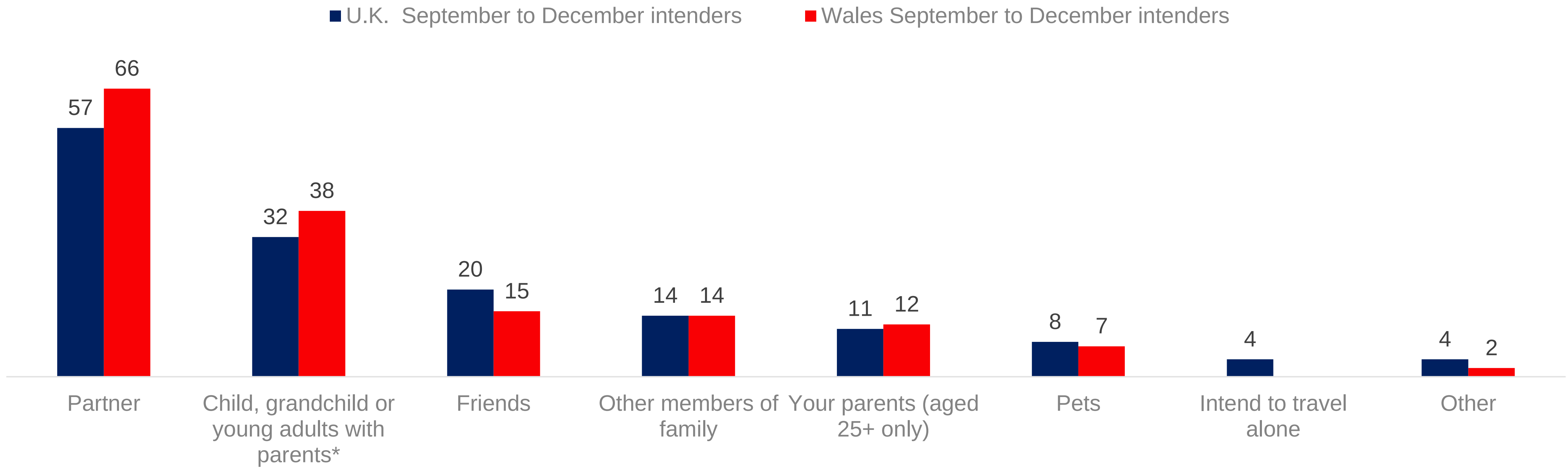
Make-up of visitor party for next Wales holiday or short break

- Amongst September to December Wales intenders, a ‘partner’ is the most common accompanying party member for a trip, followed by ‘child, grandchild or young adults with parents’ – both indexing above U.K. September to December intenders.
- Around 1 in 7 plan on travelling with friends.

Figure 52. Visitor party make-up for September to December intenders, Percentage Waves 37-39, 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 September to December. U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122 *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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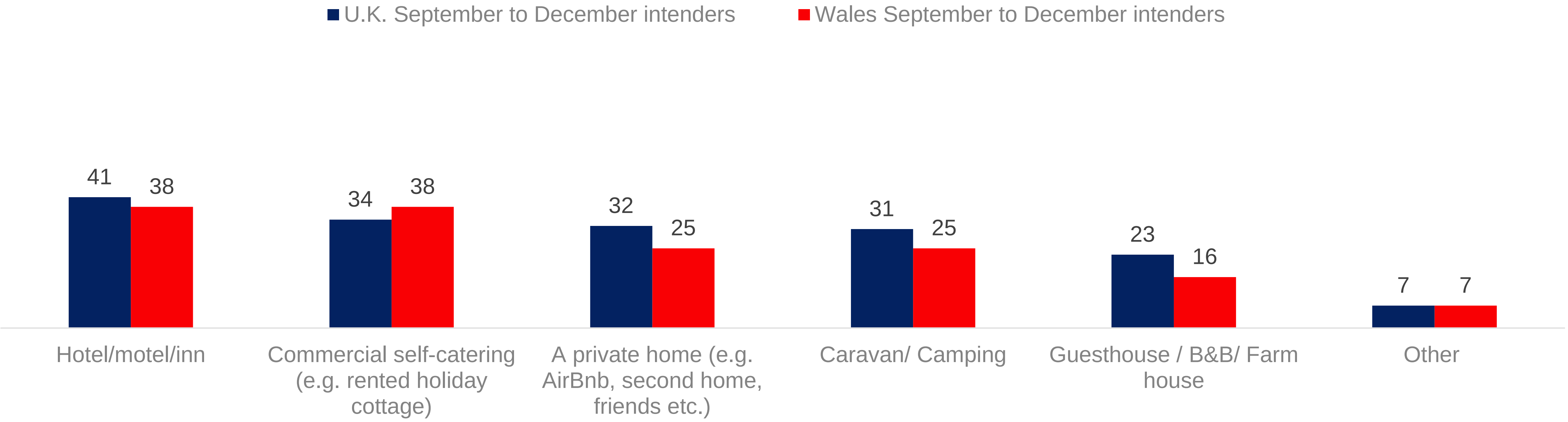
Type of accommodation for next Wales short break or holiday

- A range of accommodation types are being considered by Wales September to December trip intenders – minimal separation between anticipated stays in a ‘hotel/motel/inn’ and ‘commercial self-catering’. The preference of ‘hotel/motel/inn’ marks a shift from the summer when ‘caravan/camping’ was the leading accommodation choice.
- On average, Wales intenders are considering 1.5 accommodation types. This number is lower than previous reporting, implying that the reduced threat of government restrictions is increasing certainty.

Figure 53. Accommodation planning on staying in on next U.K. overnight trip for September to December intenders, Net percentage Waves 37-39, 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 September to December. U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122

Anticipated spend on next Wales holiday or short break

- On average, Wales September to December intenders expect to spend around £100 less on their September to December trip than U.K. intenders (£628 compared to £735).
- At a U.K. level, 'families' tend to be the highest spenders (£901) but amongst Wales intenders they spend less than average (£551), suggesting that the families that visit Wales are more likely to be looking for 'value trips' than those visiting elsewhere.

Figure 54. Anticipated spend for September to December intenders, Percentage Waves 37-39, U.K.

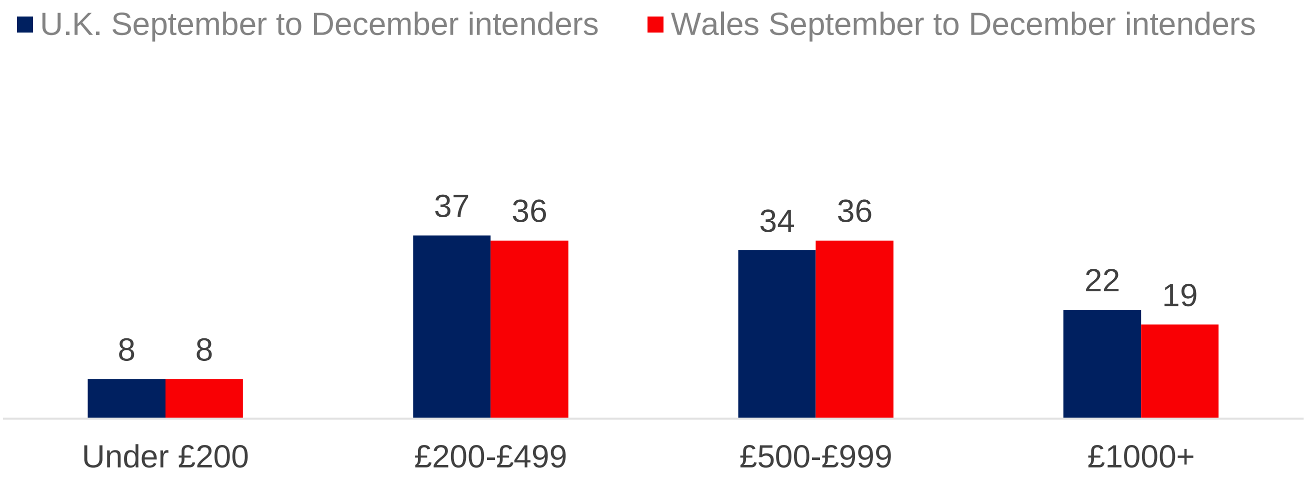
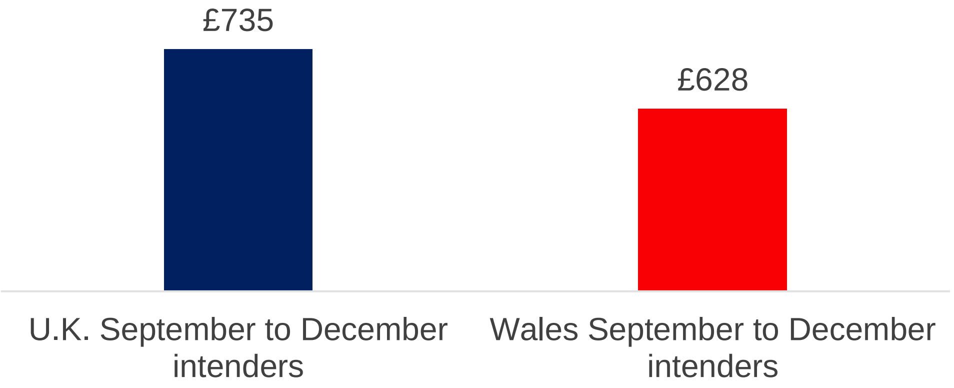


Figure 55. Anticipated average spend for September to December intenders, Average, Waves 37-39, U.K.

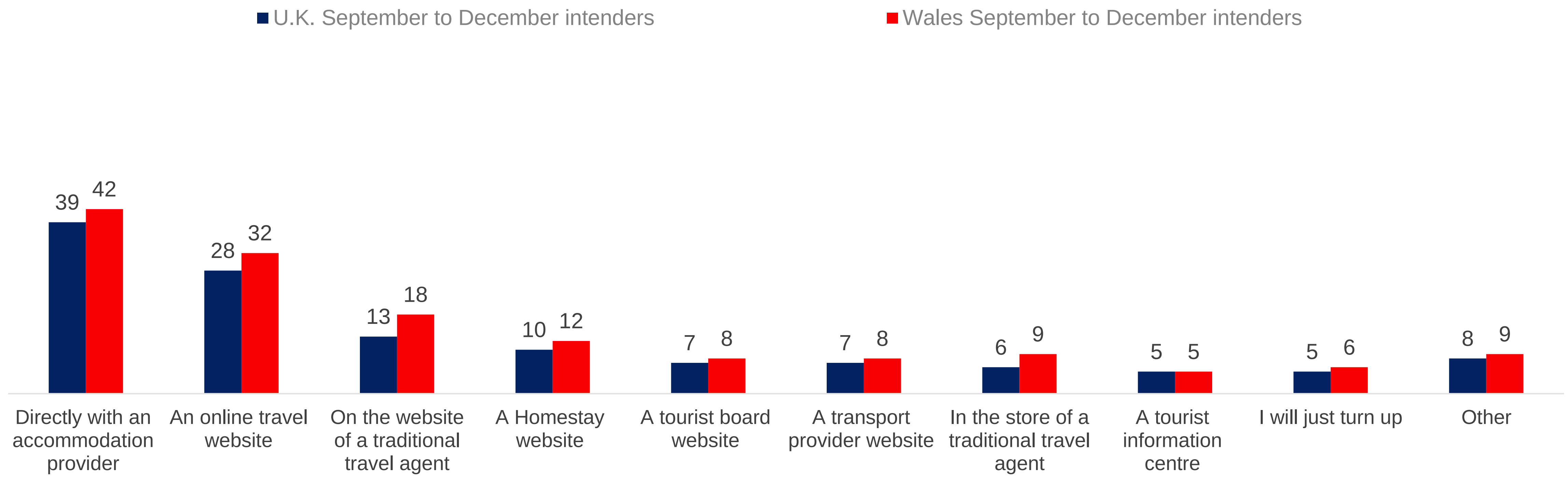


QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a domestic holiday or short break in September to December. U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122

Preferred booking channel for next Wales short break or holiday

- Both U.K. and Wales September to December 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 56. Accommodation booking channel for September to December intenders, Net percentage Waves 37-39, U.K.



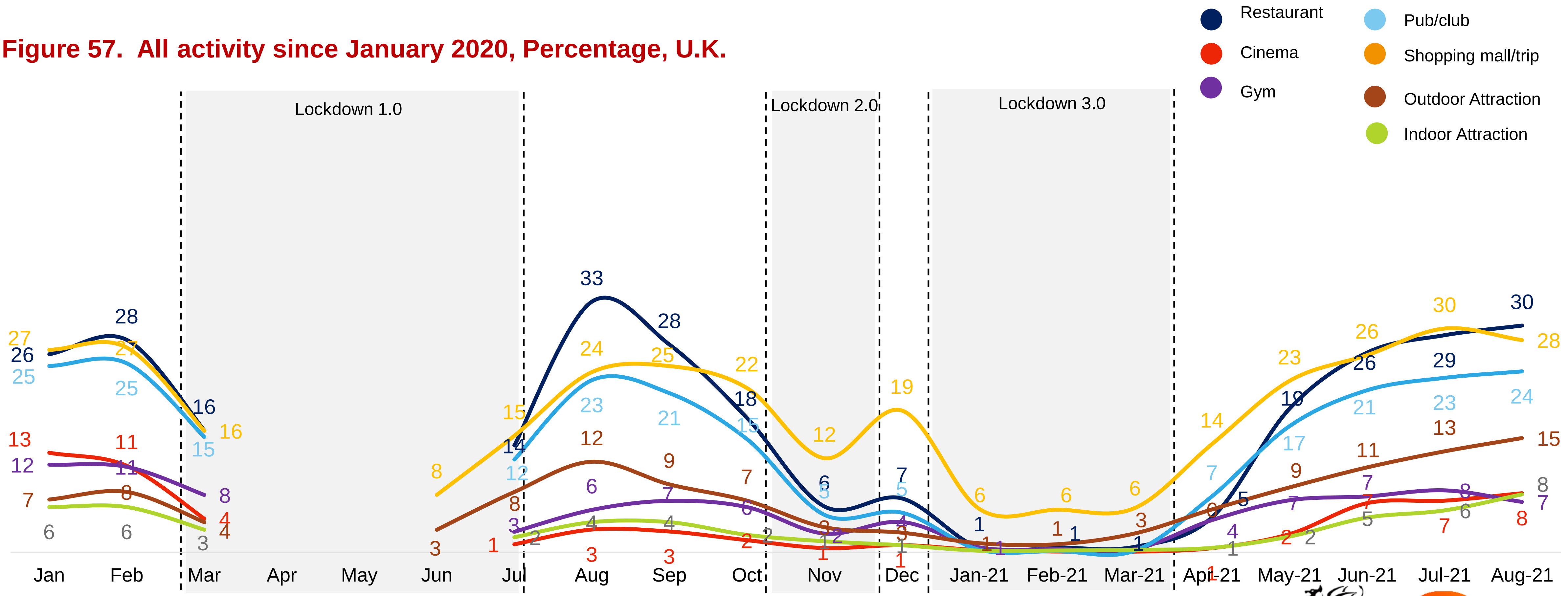
VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip?
Base: All respondents planning on taking a domestic holiday or short break in September to December. U.K. September to December intenders n=1,457; Wales Exclusive September to December intenders n=122

Day trips and general leisure behaviour

Leisure activity since January 2020

- The U.K. public's engagement in leisure activities has broadly increased with each consecutive month since restrictions were lifted earlier this year. The majority of activities report higher engagement compared to summer 2020, with the exception of visits to a restaurant (likely linked to the 2020 'eat out to help out' initiative). Engagement with indoor attracts, cinema and gyms remain relatively low.

Figure 57. All activity since January 2020, Percentage, U.K.



q1a. When have you done the following activity/activities?
= >0.5% of the population. All U.K. residents

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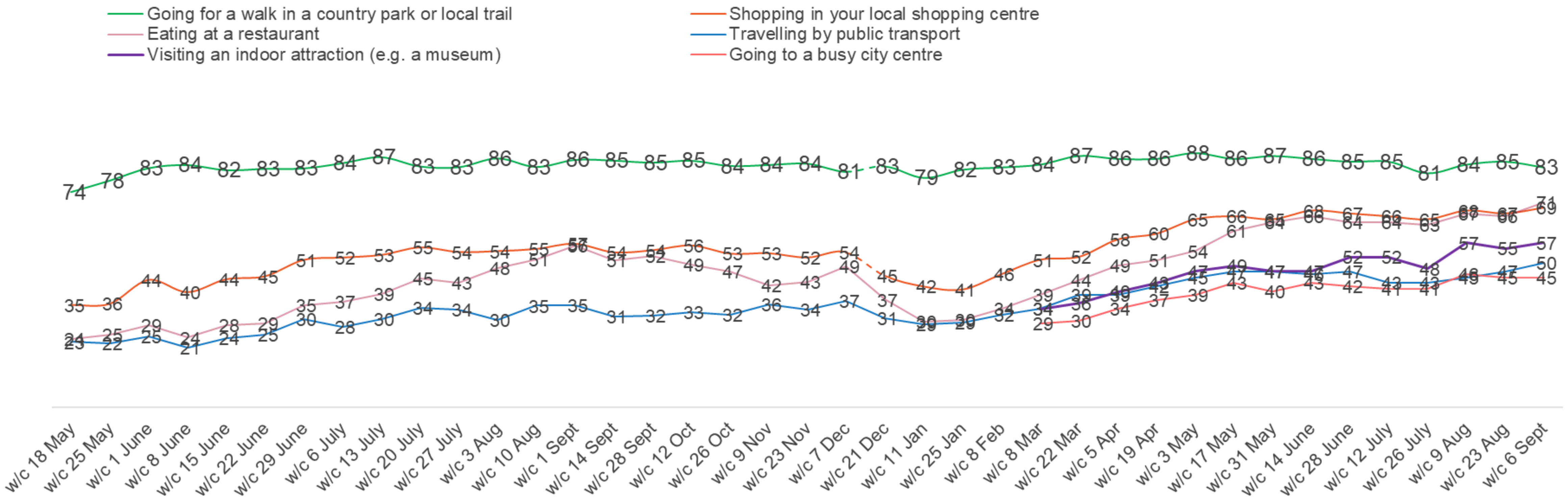
Level of comfort undertaking activities

- Comfort levels with ‘going for a walk in a country park or local trail’ have remained consistently high throughout the pandemic, sitting at 83% as of early September.
- Despite increasing pessimism in relation to COVID-19, comfort levels with most other individual activities have increased in the latest wave – reaching their highest points since the research began. Comfort levels with ‘visiting an indoor attraction’, for example, are 23 percentage points higher than in early March; visiting ‘a busy city centre’ 16 percentage points higher.

Figure 58. Level of comfort conducting individual activities*, Net very and fairly comfortable, Percent, Waves 1-39, U.K.

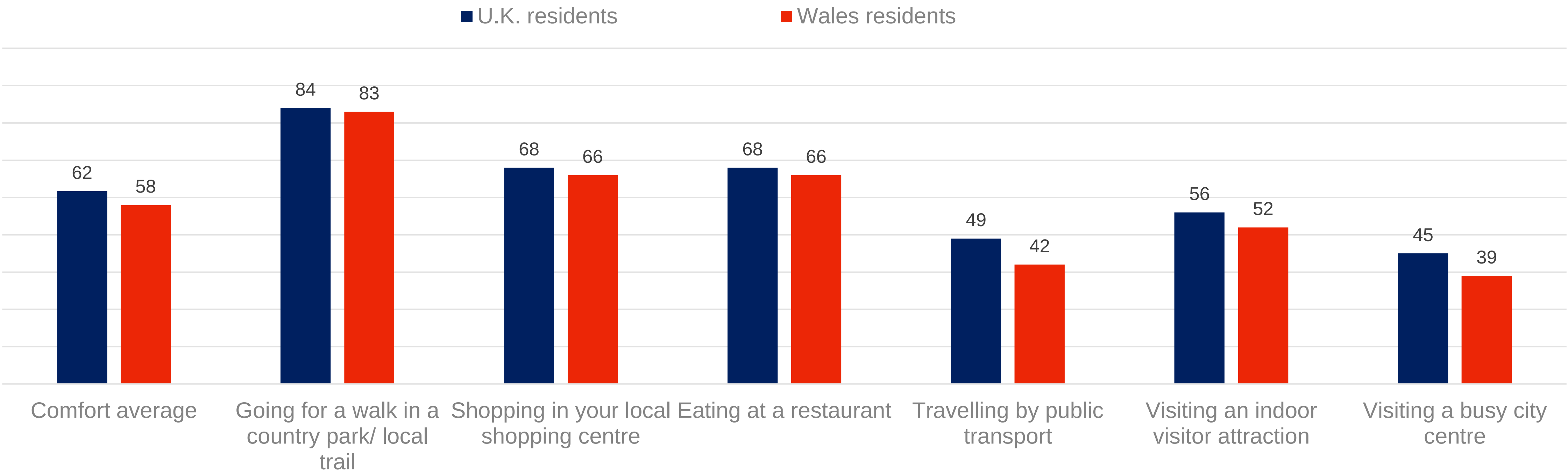


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=c.1,750. *New activities added from Wave 26 (w/c 8 Mar)

Level of comfort undertaking activities with a ‘comfort average’

- Wales residents report a marginally lower comfort average than U.K. residents, consistent across the majority of individual activities – in particular ‘travelling by public transport’ and ‘visiting a busy city centre’.

Figure 59. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 38-39, U.K. and Wales

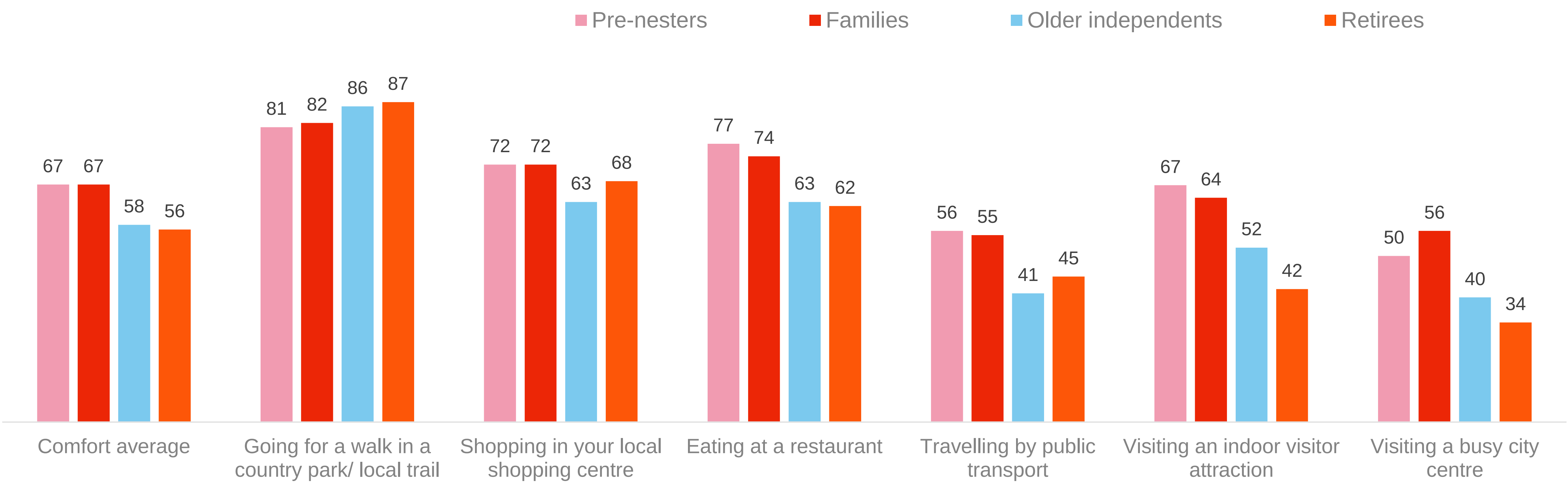


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: All U.K. respondents. n=3,520; All Wales respondents n=385

Level of comfort undertaking activities with a 'comfort average'

- Despite the vast majority having received the vaccine, retirees and older independents remain the life stages least likely to feel comfortable doing most everyday activities, with the exception of 'going for a walk in a country park/local trail'. This pattern is perhaps most notable for 'visiting an indoor attraction', only 42% of retirees describing themselves as 'comfortable' compared to 67% of pre-nesters and 64% of families.

Figure 60. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Waves 38-39, 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=779; Families n=1,219; Older Independents n=956; Retirees n=341;

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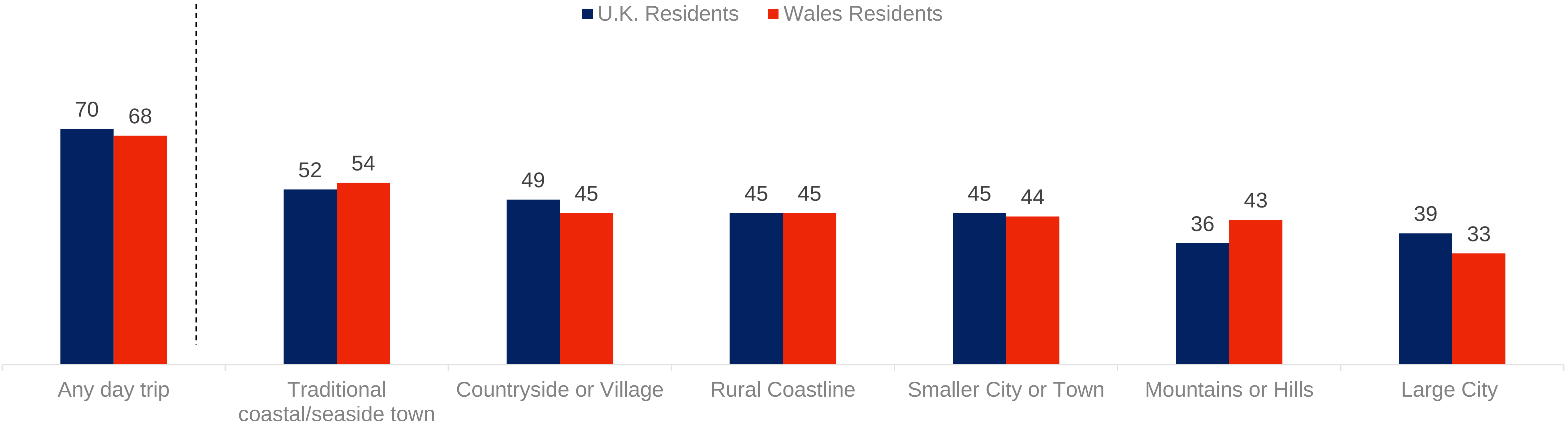
Day trip intention by destination type

- As of early September, 7 in 10 U.K. and Wales residents are planning a day trip by this autumn or later. For Wales residents, day trip intention is highest to a ‘traditional coastal or seaside town’ and lowest to a ‘large city’.

Figure 61. Likelihood to take a day trip overall and by destination type by this autumn or later, percentage, Waves 38-39, UK

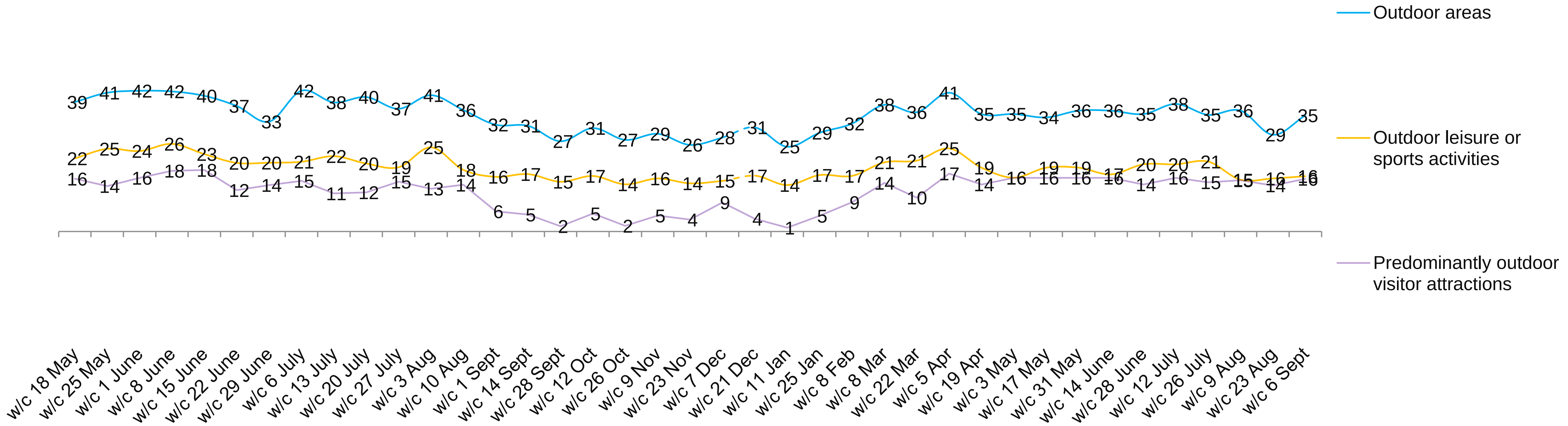


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: All U.K. respondents. n=3,520; All Wales respondents n=385

Trended anticipated activity compared to ‘normal’ in the next few months

- Engagement levels with outdoor activities and spaces remain significantly ahead of normal, with outdoor areas returning to previous levels following a dip in August.

Figure 62. Leisure venues and activities more or less likely to visit/do in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 1-39, UK

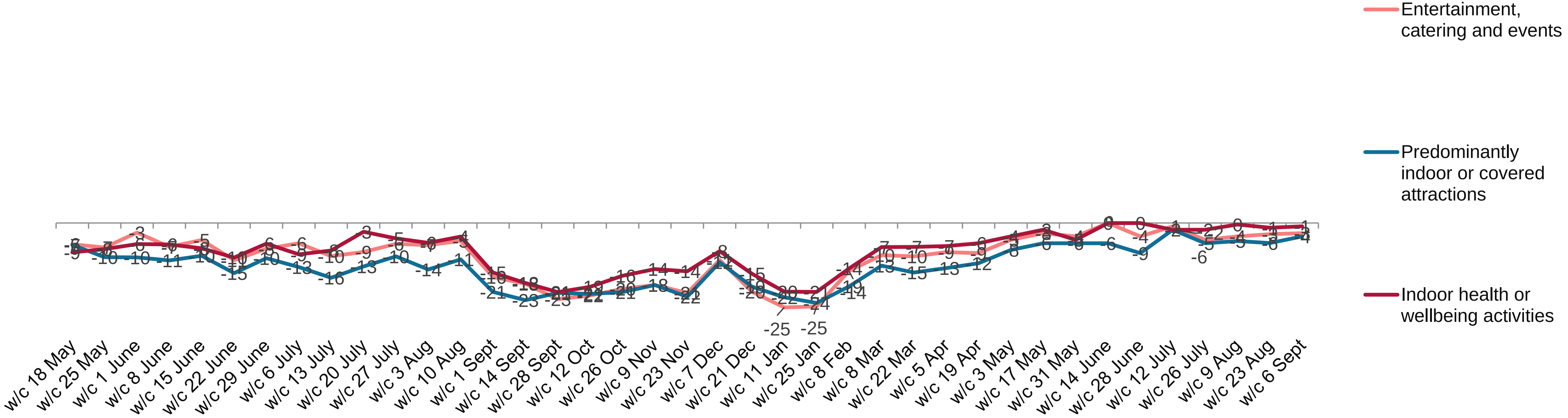


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months?
Base: All respondents. U.K. population n=3,520;

Trended anticipated activity compared to ‘normal’ in the next few months

- Although intentions are still ‘net negative’, engagement with indoor activities and spaces remain close to normal.

Figure 63. Leisure venues and activities more or less likely to visit/do in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 1-39, UK

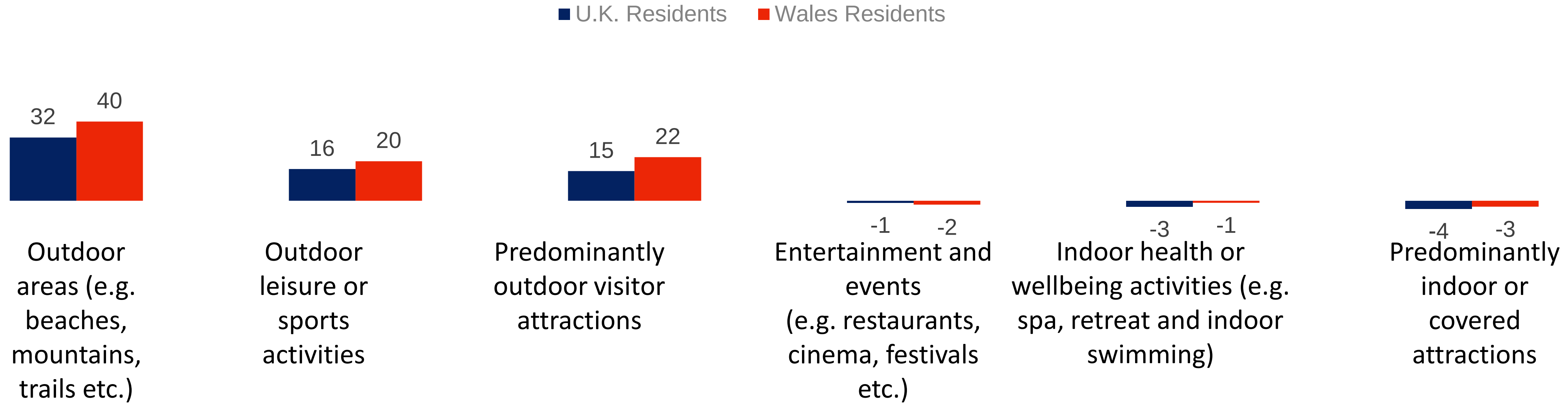


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months?
Base: All respondents. U.K. population n=3,520;

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

- As of early September 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 indoor or enclosed spaces are now relatively close to normal.

Figure 64. Leisure venues and activities more or less likely to visit/do in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 38-39, UK 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=3,520; Wales population n=385

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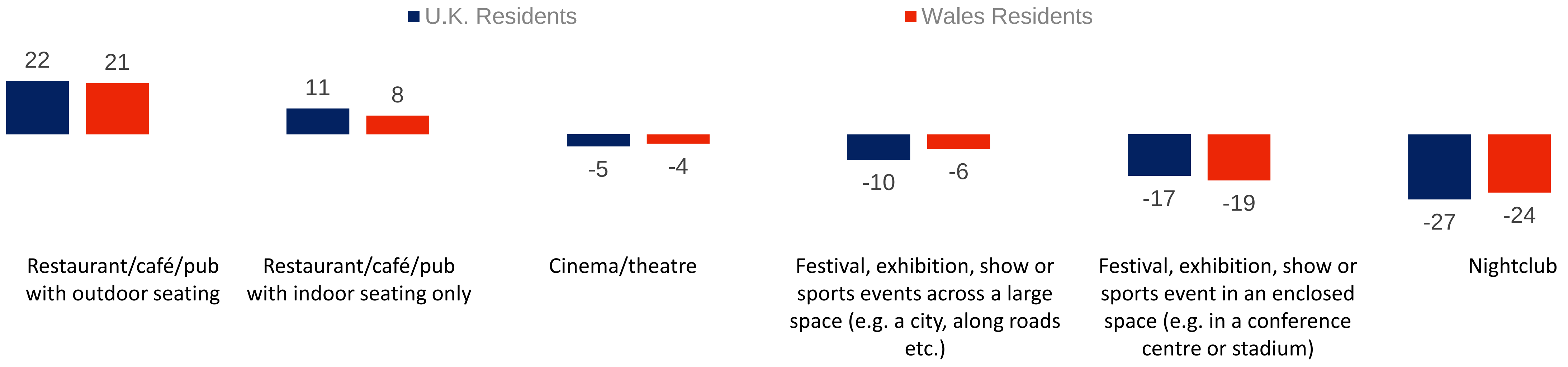
Anticipated activity compared to ‘normal’ in the next few months

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

Figure 65. Entertainment and events venues and activities more or less likely to visit/do in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 38-39, 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=3,520; Wales population n=385

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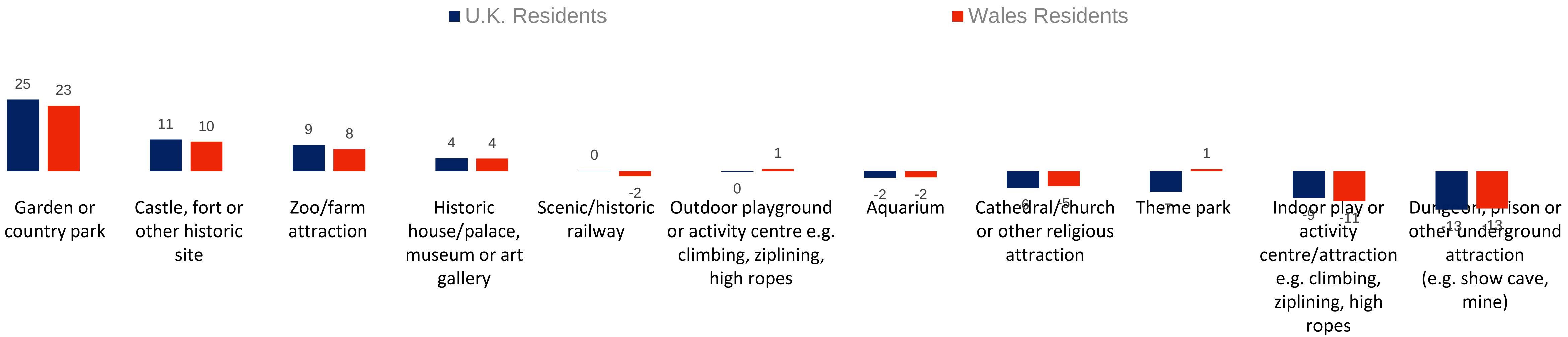
Anticipated activity compared to 'normal' in the next few months

- Four attraction types are set to generate 'net more' activity compared to normal in the next few months – 'gardens or country parks', 'castles, forts or other historic sites', 'zoos/farm attractions' and 'historic houses/palaces'. 'Scenic/historic railways', 'outdoor playgrounds' and aquariums are set to generate close to normal engagement.
- Visits to enclosed and hands-on venues such as an 'aquarium', 'cathedral church', 'theme park', 'indoor play or activity centre' and 'dungeon, prison or other underground attraction' continue to generate 'net negative' engagement (although theme parks are neutral for Wales residents).

Figure 66. Visitor attractions more or less likely to visit compared to normal in the next few months, Net: 'more likely' minus 'less likely' Waves 38-39, 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=3,520; Wales population n=385

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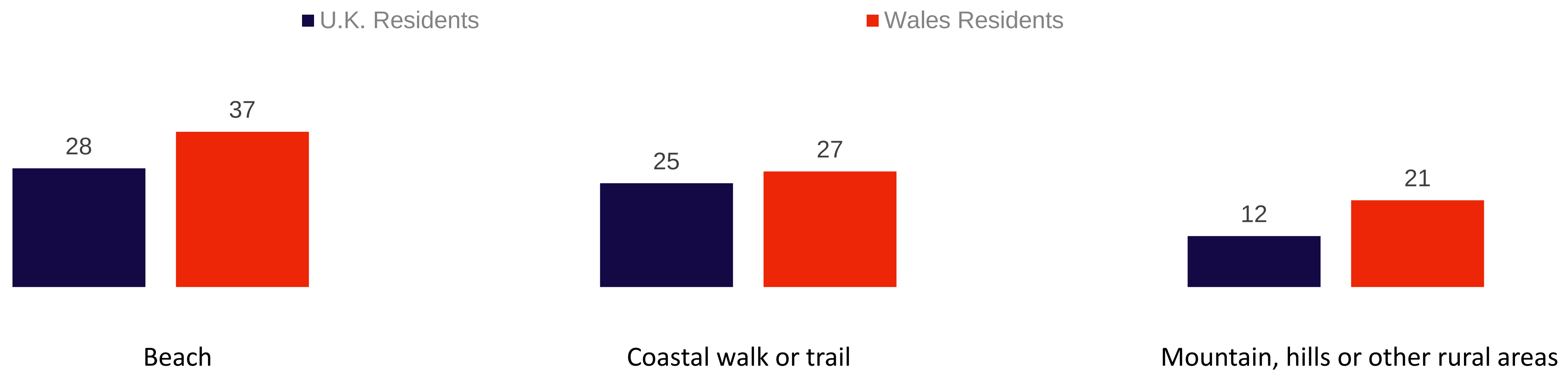
Anticipated activity compared to ‘normal’ in the next few months

- 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 67. Outdoor areas more or less likely to visit in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 38-39, 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=3,520; Wales population n=385

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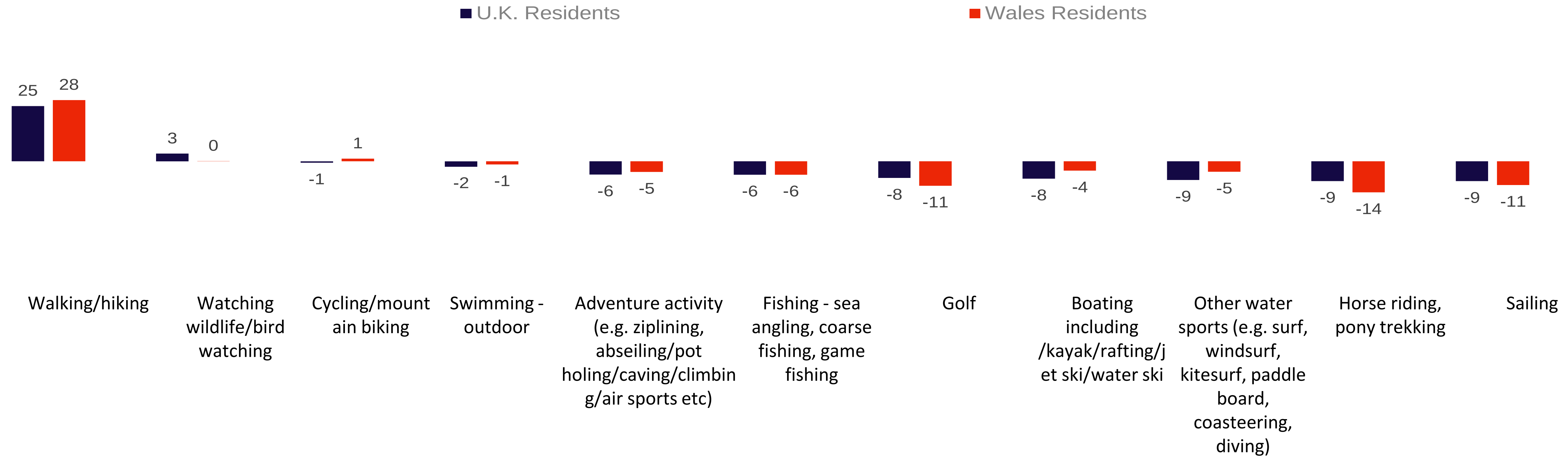
Anticipated activity compared to ‘normal’ in the next few months

- 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 watching wildlife/bird watching among U.K. residents 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 68. Outdoor activities more or less likely to visit in the next few months, Net: ‘more likely’ minus ‘less likely’ Waves 38-39, 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=3,520; Wales population n=385

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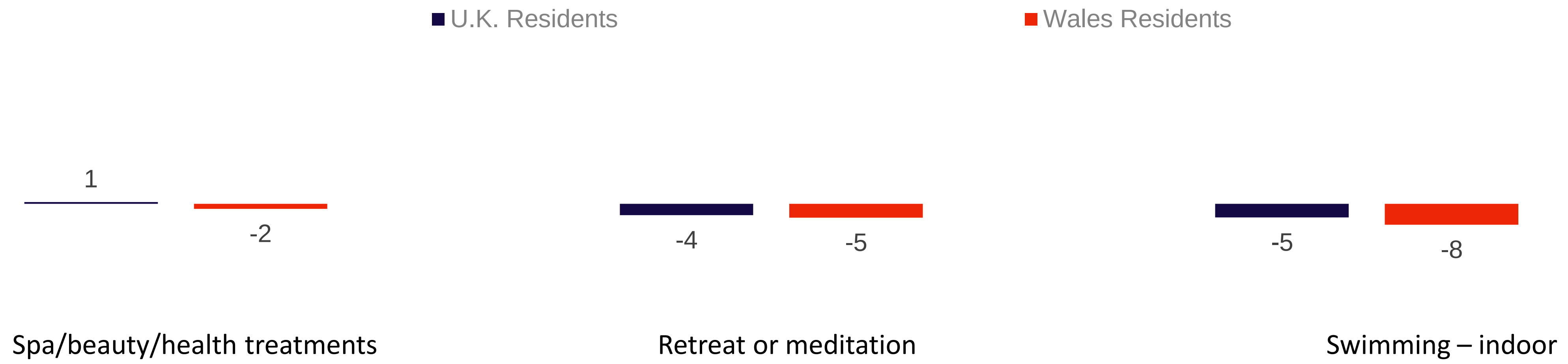
Anticipated activity compared to 'normal' in the next few months

- Anticipated engagement with indoor health and wellness activities is relatively close to normal – 'spa/beauty/health treatments' the closest.

Figure 69. Indoor health and wellness more or less likely to do compared to normal in the next few months, Net: 'more likely' minus 'less likely' Waves 38-39, 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=3,520; Wales population n=385

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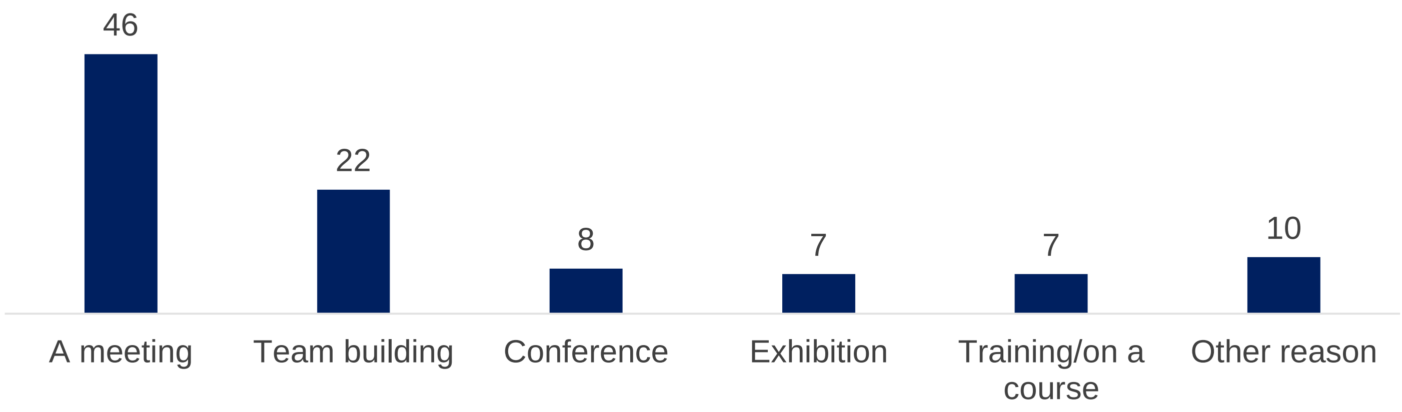
Travelling for business

Intention to take an overnight business trip in next six months

- Only 12% of U.K. adults in employment intend to take an overnight business trip in the next six months, dropping slightly to 7% of Wales residents. A meeting is by far the most prevalent reason for an overnight trip – chosen by nearly half.

Figure 70. Proportion anticipating an overnight business trip in the next six months, Percentage, Waves 36 + 38, U.K.

Figure 71. Reasons for taking an overnight business trip , Percentage Waves 36 + 38, U.K. residents in employment



Vb14a. Now looking ahead are you intending to take any overnight business trips inn the UK between now and March 2021?
Vb14b. What would be the main reason for this overnight business trip? Base: All respondents. U.K. population n=3,520; Wales population n=385

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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 37-39 of the COVID-19 consumer tracker.

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