

Message

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**Subject:** FW: Official Sensitive - Findings from Welsh Ipsos MORI survey research on public attitudes/perceptions to Covid-19 (Wave 28) - 6-9 November

**Attachments:** 20-036347-01 Ipsos COVID Report Wave 28 Wales V4\_INTERNAL & CLIENT USE ONLY.pdf

**Flag:** Follow up

For info.

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**Subject:** Official Sensitive - Findings from Welsh Ipsos MORI survey research on public attitudes/perceptions to Covid-19 (Wave 28) - 6-9 November

Find below the latest briefing providing key findings for Wales from Wave 28 of Ipsos MORI's ongoing online panel survey tracking public views on COVID-19. This is the twenty fourth wave including the

boosted sample for Wales, fieldwork taking place from 6-9 November i.e. **during the last few days of the national fire break**. Data were first collected in Wales on the 19-21 March, Wave 5 of the survey, and continued weekly until 10-13 July. The survey then moved to running fortnightly from the 31 July-5 August wave onwards, in line with Ipsos MORI's global Coronavirus public attitudes tracking survey. The UK figures in this report are from the global tracker.

## Background

As noted in the regular briefings, establishing a Welsh boost in this survey that started collecting data in early February was seen to be an important and pragmatic way of filling an evidence gap on perceptions and attitudes among the Welsh public in relation to Coronavirus. Some measures have been retained to enable an assessment of change through time but the dynamic nature of the study means content has also been adapted to changing circumstances. For example, for this wave, a number of questions were included in an attempt to contribute to our understanding of the initial impact of the fire break, the ongoing approach to reduce transmission and likelihood of being vaccinated. Where possible, results from Wales and the UK continue to be presented.

## Summary of methods

The sample size in Wales remains around 500 16-74 year-olds, broadly representative at population level. Likely credibility intervals around the indicators outlined below will be in the region of +/- 2% for the UK sample and closer to +/- 4% for the Welsh boosted sample. Given these credibility intervals, differences between weeks should be interpreted with some caution.

## Key messages from the findings

As with previous briefings, Ipsos MORI's high level summary is reproduced below, followed by selected findings from each section of the latest report.

*This wave coincided with the final days of the firebreak restrictions in Wales. The Welsh public remain concerned about the virus, with over half saying it is the challenge that concerns them the most. Although perceptions of the threat posed by the virus are largely similar to those seen in October, slightly fewer now see the virus as a threat to their local community –which may reflect the enhanced restrictions during the firebreak.*

*Most report they are staying local and avoiding non-essential travel journeys. However, just half report meeting indoors only with their household or extended household –which suggests a compliance gap. There has been a rise in support for closing the Welsh border to people travelling from elsewhere in the UK, with more than four in five now saying they support this measure.*

*A large majority (86%) feel confident that they understood Welsh Government guidance on what to do during the firebreak. Three quarters of the Welsh public say they support the firebreak measures, and four in five say they think it has had at least some impact on the behaviour of the public. While a majority say they coped well emotionally during the firebreak, one in ten say they coped badly. Young people –those aged 18-35 –are less likely to feel they coped well emotionally than their older counterparts are.*

*Seven in ten of the Welsh public say they would be likely to get vaccinated against COVID-19 in the next six months, if a vaccine became available.*

*Ratings of the Welsh Government's performance in containing the spread of the virus have risen slightly since the firebreak started. This is in contrast to ratings of the UK Government, which are at the lowest level yet recorded in this tracking survey.*

## Context

- Under one in five (16%) of respondents report having **stayed at home for 14 days because someone in the household had symptoms of COVID-19**, slightly lower than previous weeks.
- 9% have experienced one or more **COVID-19 symptoms** in the last week, though only two in five (40%) of these participants have **requested a test**.
- Fewer than one in twenty (3%) report having been **diagnosed with COVID-19** themselves.

## Views of threat

- When asked about **current concerns** in Wales, over half (55%) report the COVID-19 pandemic concerned them most. This is higher than the UK figure (48%). Other concerns reported, all around one in ten, include the economy (11%), personal financial concerns (8%), the environment/climate change (9%) and health (7%). These are broadly consistent with the UK data.
- One in three (31%) continue to report Coronavirus posing a **threat to them personally**, while two in five (39%) report this threat **to their family**. Both these figures are slightly higher than the UK figures (27% and 35%, respectively). The highest level of threat is seen to be to the country (61%), slightly lower than for the UK (65%).
- The majority (71%) still believe that Coronavirus poses a **threat to the world** and 37% report it poses a **threat to their community**, the latter down on recent weeks and at its lowest level yet.
- Around one in three (33%) see the coronavirus as a **threat to their job or business** (down from 41% a month ago).
- Around one in five three (35%) are concerned about **being infected with COVID-19 in the next month**, reducing from the highest proportion reported to date in late September (41%), however increasing from the last wave (31%).

## Perceived economic and financial impacts

- Around one in five (18%) of those in work report having **had their salary reduced/lost wages** and a similar proportion (16%) have had their **working hours reduced**. One in twenty (5%) of all respondents report having **lost their job**.
- One in five (21%) of all respondents report **delaying or cancelling big purchases**, just under one in five (16%) of those in work have had to **use savings to pay a bill**, and a similar proportion (10%) have had to **delay paying at least one bill**.
- Thinking ahead to a month from now, around one in five are **worried about their jobs** (20%), **paying bills** (22%) and **being able to provide for the household** (21%), all in line with previous waves.

## Self-reported current and intended behaviour

- In terms of adherence to various mitigating actions, the proportion of those in employment **working from home** rose in the past fortnight (37%), although this remains lower than the high of 43% in late March.
- Over half (55%) report **avoiding non-essential use of public transport**, lower than the peak of 69% in late April but broadly consistent with recent months. Over half (64%) report **avoiding non-essential travel journeys**, higher than levels reported in recent months, the highest level since late May and substantially higher than figures recorded in the summer. There has been a slight increase in the past three waves (e.g. 47% in late August).
- Three quarters (74%) continue to report trying to keep **2 metres distance** from people when out, this figure remaining relatively stable since Welsh data began being collected in March.
- Three in five (60%) report **only leaving the house for essential trips** (compared, for example, with 38% in early September), with a slightly higher proportion (67%) continuing to **stay local** (highest recorded since the question was first included in July). Just under half (49%) of respondents report **avoiding contact with elderly or vulnerable people**, consistent with recent weeks. Just under one in five (15%) continue to report **not leaving their home at all**, consistent with previous waves but lower than the high of 21% in May when this question was first asked.
- Just under half (48%) of respondents reported only meeting indoors with their own household or temporary extended household (which was possible under the fire break). Evidence from other sources suggests a degree of non-adherence in terms of mixing between households indoors (e.g. recent PHW and ONS surveys) but this proportion was lower than would have been anticipated. We will be exploring the question wording prior to the next data collection to ensure it adequately captures what is (an admittedly) difficult area to measure.
- Respondents were asked about other **measures they may be undertaking specifically to protect themselves from the virus**. Around three quarters (74%) report avoiding crowded places, with around two thirds (68%) avoiding close contact with others. Both of these figures are similar to those of the past month.
- Half (50%) report **cancelling or postponing holiday/leisure plans** (broadly consistent with recent months). Two in five (40%) report **cancelling or postponing a trip within their country** (compared with a peak of 55% in April), while just under half (49%) report **cancelling plans to attend events/large gatherings** (an increase on the position a fortnight ago when it was 44%).
- Around two in five (42%) report **cancelling plans to travel by air**, while a quarter (27%) report **cancelling or postponing plans to travel by car**. Both have declined compared with earlier in the pandemic, the decline remaining steeper for travel by car (peaking at 52% in April). Four in five (81%) agree they will **not be making travel plans until the situation is back to normal**, in line with previous waves. This figure is broadly consistent with UK figures for previous waves.
- The vast majority (87%) now report **wearing a face covering to protect themselves from the virus**, in line with the previous two waves. Note the wording of this question was changed from face masks to face coverings from wave 17 (in mid-June) and it became mandatory in September for face coverings to be worn in shops and other indoor spaces in Wales. However, two in five (37%) **avoid places/situations where it is mandatory to wear a face covering**, in line with previous wave albeit down slightly from 40% in September. This figure is slightly higher than that for the UK (32%).

- When asked whether they will **go back to doing all of the things they did before including holidays and travel**, the proportion has remained relatively stable again this week, with half (50%) reporting this. When asked specifically whether they would **travel by air less than before** around seven in ten (73%) report this, consistent with figures seen since late-May. Those reporting they will **avoid public transport and use their car more than before** also remains consistent, with around seven in ten (73%) reporting this. Those reporting realising they **can do with less and will reuse rather than buy new each time** is slightly higher in this wave, with the majority (85%) reporting this.
- When asked about actions they are likely to take in the next six months, around four in five of respondents (84%) continue to report being likely to **avoid large crowds**. Around nine in ten (89%) continue to report being likely to **wear a face covering when at a grocery store or other busy public locations** as well as four in five **on public transport** (86%). Around half (49%) of respondents (in employment) continue to report **being likely to work from home on a regular basis**. Two in five (49%) think they will get **tested for antibodies** for COVID-19 (increase from 40% a month ago). The proportion reporting being likely to **get a flu vaccine** in the next six months also remained stable, with over half (57%) reporting this.
- 7 in 10 (71%) say they are **likely to get vaccinated for COVID-19 in the next 6 months**, if a vaccine is available (49% very likely and 22% somewhat likely).

### Resuming normal life: feelings and expectations

- Around two in five (23%) report **feeling lonely all or most of the time** during the past week (an increase from 21% in previous wave).
- A third (34%) still believe it will take 1-2 years for things to feel like they are **getting back to normal**. Over a quarter (26%) believe it will be in 6 months to a year. Around two in five (15%) continue to think it could take 2 years or longer.
- Around half (47%) support **restarting the economy**. This is slightly lower than the previous wave which recorded the highest figure reported yet (50%).
- Around half (55%) remain anxious about **resuming normal activities**, still lower than its peak at 69% in early July.
- In the long-term, as a result of Coronavirus, the vast majority in Wales expect to make **small changes** (44%) to their lives, **make many changes** to the way they live (30%) or anticipate things **changing completely** (14%). Only around one in ten (11%) envisage doing everything as before. These figures are broadly consistent with UK figures.
- When asked if they would feel **comfortable with children attending school** at the present time, just over half (53%) report they would be, the highest figure since the question was first asked in May. Just under three in five (57%) of those (working) report they would feel **comfortable going to their usual place of work**, higher than a fortnight ago (51%). Around a quarter (25%) would be comfortable **using public transport**, remaining consistent with figures reporting this in previous weeks.
- Respondents were asked **how confident they are, if at all, that it is currently safe for children in Wales to attend school and childcare**. Over half (54%) are confident that this will be safe, slightly up the previous wave but consistent with recent weeks.

## Attitudes to actions to contain the virus

- A large majority (86%) are confident they **personally understood the Welsh Government's firebreak** guidance, while 71% reported thinking **the general public understood the guidance**. Note the difference in those very confident (45% self, 19% general public).
- Almost half (46%) report **not knowing very much or nothing at all about the 'Test, Trace, Protect' system**. Respondents remain split on **how confident they are that the system will help**, with 46% reporting being confident and 45% saying they are not confident, an increase in confidence since the last wave.
- Respondents were asked about **support for specific protective measures** against COVID-19. Almost nine in ten (88%) support the government mandating use of face coverings in any indoor space, while 83% would support closing borders to anyone from another country. A lower proportion (although still a sizeable majority) would support restricting the number of days children can attend school in person (67%) and closing the Welsh border to anyone travelling from another part of the UK (82%). Fewer (41%) would support employers mandating employees to return to the office.
- More than half (57%) said they knew either a great deal or a fair amount about the **NHS Covid-19 phone app**, with only 3% having not heard of it. Since the start of October there has been an increase in those who say they have downloaded the app (up 8% to 42%). A quarter (24%) might download in the future and the remaining third (32%) say they do not intend to download it. Security concerns remain the main reason given for not downloading the app (40%), while around a quarter (24%) do not have a smartphone or a smartphone capable of downloading the app. In line with previous waves, the majority of those who downloaded the app would use it to report symptoms (92%) or to self-isolate if advised to (93%).

## Views on the Firebreak

- Three quarters (75%) of the Welsh public report **supporting the firebreak**.
- Four in five (80%) think the firebreak has had at least **some impact on the behaviour of the general public in Wales** – including more than two in five (43%) who report it having a **great deal/quite a lot of impact**.
- Most (68%) say they **coped well emotionally during the firebreak**, although one in ten (10%) say they coped badly. Younger people are less likely to say they coped well emotionally (under 35s at 54% well, 35-49 at 71% well, 50-74 at 78% well).
- Large majorities agree both that **everyone living in their area has an important role to play in controlling the spread of the virus** (79%), and that **their own behaviour has an impact on controlling the spread** (87%).
- Nine in ten (90%) report feeling well informed about what **behaviours help to reduce the spread of COVID-19**.
- Given the choice of two options, around three in five (61%) report **favouring government setting strict rules about how people should behave during the pandemic**, rather than people being trusted to decide for themselves based on information provided.

- Around one in four quarter (27%) believe **most people can be trusted**, while almost two thirds (62%) take the view that “you can’t be too careful in dealing with others”.
- However, in contrast, large majorities report people in Wales are **willing to pull together and help each other out generally** (86%, with 31% very willing), and to **act together to help slow the spread of the virus** (74%, 22% very willing).

## Trust and government performance

- **Ratings of the Welsh Government** have increased since the start of the firebreak, with 71% now saying it is doing a good job (compared to the 64% reported as the fire break started). In contrast, ratings of the UK Government are at their lowest level yet (32%).
- Three quarters (72%) believe that **businesses in Wales are doing a good job to contain the spread of the virus**, remaining broadly consistent with previous weeks, while around four in five (80%) continue to think their **employer is doing a good job**, up from 76% a month ago.
- The vast majority continue to believe the **NHS is doing a good job**, with around two in five (81%) reporting this. This proportion has remained broadly consistent since March.
- More than half (57%) trust the **Welsh Government to deliver information on the coronavirus**. Three in five (59%) continue to trust **local health authorities**, consistent with previous weeks. Almost seven in ten (68%) trust **scientists** but trust in social media remains low (fewer than one in ten report trust in various platforms). Trust in information delivery from the **UK Government** remains relatively low (31%) and has fallen away since earlier in the pandemic.

## Next steps

Data collection will continue fortnightly, with content being reviewed on a wave by wave basis. As noted above, data collection in Wales is back in sync with the global tracker, which will allow, for example, comparisons with the UK for a number of indicators (as seen above).

Colleagues in the HSS Technical Advisory Cell, KAS-COVID-19 mailbox and Project COVID-19 Team have been copied in to this briefing.

**Please note the report can be shared within Welsh Government (and appropriate Public Health Wales colleagues) but not beyond. Any requests to use the data publicly must come through KAS in the first instance.**

**Also, note a small number of indicators will continue to be put into the public domain shortly after reports are received – see link below.**

<https://gov.wales/survey-public-views-coronavirus-covid-19>

Selected findings also continue to be included in the KAS COVID-19 monitor.

As with previous weeks, any queries please don’t hesitate to let me know, including suggestions for how these briefings could be improved.

Diolch,

NR



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