

YouGov / True Global Intelligence Survey Results

Sample Size: 1716 adults in UK
Fieldwork: 23rd - 24th September 2021

	Vote in 2019 GE			EU Ref 2016		Gender		Age				Social Grade		Region							
	Total	Con	Lab	Lib Dem	Remain	Leave	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	London	Rest of South	Midlands / Wales	North	Scotland	Northern Ireland	
Weighted Sample	1716	563	415	149	637	674	836	880	187	716	415	398	978	738	199	561	367	402	142	45	
Unweighted Sample	1716	579	405	157	703	690	726	990	137	665	425	489	1022	694	167	573	363	408	152	53	
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

What impact, if any, do you think lowering prices in restaurants, pubs and cafes, and maintaining them at a lower level long-term, would have on each of the following?

You personally

A large positive impact	22	20	25	17	21	22	20	23	38	20	20	18	22	21	23	21	23	23	18	22
A small positive impact	36	35	41	38	41	32	35	37	32	39	34	34	39	32	43	36	31	37	31	33
TOTAL POSITIVE IMPACT	58	55	66	55	62	54	55	60	70	59	54	52	61	53	66	57	54	60	49	55
No impact at all	32	37	25	35	32	37	34	30	13	27	40	41	31	34	21	34	37	27	40	32
A small negative impact	1	1	2	0	1	2	2	1	2	1	1	1	1	2	1	1	2	1	1	0
A large negative impact	1	1	0	0	0	1	1	1	0	1	0	1	1	1	2	1	1	0	1	0
TOTAL NEGATIVE IMPACT	2	2	2	0	1	3	3	2	2	2	1	2	2	3	3	2	3	1	2	0
Don't know	8	6	8	9	5	7	9	8	15	11	4	5	6	11	10	7	6	11	8	13

Society generally

A large positive impact	27	28	31	20	27	29	25	29	28	26	29	26	27	27	26	27	28	26	28	33
A small positive impact	42	48	36	47	43	43	42	42	37	38	45	51	45	39	39	43	44	44	40	33
TOTAL POSITIVE IMPACT	69	76	67	67	70	72	67	71	65	64	74	77	72	66	65	70	72	70	68	66
No impact at all	11	11	12	13	12	11	12	10	4	12	13	12	11	11	12	11	13	9	11	9
A small negative impact	4	3	6	5	5	3	4	4	10	5	3	2	4	4	3	5	4	3	6	5
A large negative impact	2	2	1	0	1	2	1	2	1	2	2	1	1	2	2	1	2	2	1	2
TOTAL NEGATIVE IMPACT	6	5	7	5	6	5	5	6	11	7	5	3	5	6	5	6	6	5	7	7
Don't know	14	9	14	16	11	12	15	13	20	17	10	9	11	17	17	12	10	16	15	18

The industry generally

A large positive impact	24	27	25	20	24	27	24	24	16	24	25	27	24	24	26	24	22	25	26	29
A small positive impact	28	33	24	30	28	33	29	27	18	22	36	36	30	26	18	30	27	32	31	26
TOTAL POSITIVE IMPACT	52	60	49	50	52	60	53	51	34	46	61	63	54	50	44	54	49	57	57	55
No impact at all	9	9	8	8	9	8	10	7	7	9	9	10	9	9	9	9	11	7	8	2
A small negative impact	15	12	17	17	16	11	15	15	30	16	10	11	16	14	19	15	17	14	9	18
A large negative impact	8	6	9	8	10	7	6	10	8	10	8	5	9	7	4	10	9	7	11	6
TOTAL NEGATIVE IMPACT	23	18	26	25	26	18	21	25	38	26	18	16	25	21	23	25	26	21	20	24
Don't know	15	12	16	17	13	14	15	16	21	19	11	11	12	20	24	13	14	15	15	19

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	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

How important, if at all, do you feel that restaurants, pubs and cafes are to each of the following?

Providing jobs in your area

Very important	37	37	39	38	40	37	32	41	32	34	44	36	37	37	34	36	35	38	41	40
Fairly important	44	45	43	49	45	46	47	42	39	45	42	48	46	42	45	47	43	42	41	47
TOTAL VERY/ FAIRLY IMPORTANT	81	82	82	87	85	83	79	83	71	79	86	84	83	79	79	83	78	80	82	87
Not very important	9	9	8	7	8	8	10	7	11	7	9	11	9	8	12	7	11	6	11	7
Not at all important	1	1	1	0	1	1	2	1	2	1	1	1	1	2	1	1	3	1	1	0
TOTAL NOT VERY/ NOT AT ALL IMPORTANT	10	10	9	7	9	9	12	8	13	8	10	12	10	10	13	8	14	7	12	7
Don't know	9	7	9	6	7	7	10	8	16	12	4	5	7	11	8	8	9	12	6	6

Your social life

Very important	18	18	23	14	20	16	16	19	27	17	17	13	17	18	23	16	17	18	16	13
Fairly important	35	35	39	43	38	34	34	36	33	38	34	33	39	30	39	34	33	37	33	35
TOTAL VERY/ FAIRLY IMPORTANT	53	53	62	57	58	50	50	55	60	55	51	46	56	48	62	50	50	55	49	48
Not very important	29	33	23	27	29	32	30	28	19	25	33	37	30	27	22	32	33	24	33	29
Not at all important	12	10	10	12	9	14	13	11	7	10	14	15	9	16	9	13	11	11	14	19
TOTAL NOT VERY/ NOT AT ALL IMPORTANT	41	43	33	39	38	46	43	39	26	35	47	52	39	43	31	45	44	35	47	48
Don't know	6	4	5	3	4	4	7	6	13	10	2	2	5	8	7	6	5	10	3	4

Your local community

Very important	31	32	35	32	36	31	28	35	28	30	38	28	30	32	32	30	27	35	36	33
Fairly important	47	49	45	48	47	49	48	47	41	48	44	54	49	46	47	51	49	43	44	50
TOTAL VERY/ FAIRLY IMPORTANT	78	81	80	80	83	80	76	82	69	78	82	82	79	78	79	81	76	78	80	83
Not very important	10	11	9	9	9	11	12	8	8	9	10	12	12	8	8	10	12	9	11	9
Not at all important	2	1	3	0	1	2	2	1	4	1	2	1	1	2	1	1	3	1	1	2
TOTAL NOT VERY/ NOT AT ALL IMPORTANT	12	12	12	9	10	13	14	9	12	10	12	13	13	10	9	11	15	10	12	11
Don't know	10	7	8	11	7	7	11	9	19	12	6	4	8	12	12	8	9	12	8	5

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	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

After a temporary reduction in VAT for the hospitality and tourism industries during the coronavirus pandemic, the Government plans to return VAT to the pre-pandemic rate of 20% in April 2022.

Which of the following statements comes closest to your view?

VAT should return to 20% earlier than April 2022	12	15	11	7	10	14	15	9	13	12	14	11	12	13	8	12	10	16	13	14
VAT should return to 20% in April 2022	19	23	17	21	22	21	21	17	10	17	24	22	22	15	16	19	20	19	21	23
VAT should return to 20%, but later than April 2022	12	12	16	13	15	11	14	11	17	13	11	11	14	11	12	14	13	11	13	6
VAT should be kept at its current levels long-term	30	32	30	29	29	33	31	29	19	25	32	41	32	27	30	29	30	30	30	32
Don't know	27	17	27	31	24	21	20	33	42	33	19	15	21	34	34	26	27	25	24	25

If prices were increased permanently in restaurants, pubs and cafes, would you be more or less likely to eat out, or would it make no difference?

Much more likely	1	1	2	0	1	1	1	1	6	1	1	0	1	1	1	1	1	2	0	2
Slightly more likely	3	2	4	2	3	3	3	4	2	4	3	3	3	3	4	3	3	4	3	3
TOTAL MORE LIKELY	4	3	6	2	4	4	4	5	8	5	4	3	4	4	5	4	4	6	3	5
Would make no difference – I would eat out anyway	24	31	23	30	29	25	25	22	17	21	26	29	26	20	20	23	28	21	31	12
Would make no difference – I would not eat out anyway	16	15	12	14	13	17	17	15	15	13	18	19	13	20	12	18	15	16	14	16
Slightly less likely	29	29	32	39	32	28	26	31	28	30	27	30	32	25	36	28	26	32	24	26
Much less likely	20	17	22	12	17	22	20	21	18	22	22	17	18	22	22	20	20	16	25	34
TOTAL LESS LIKELY	49	46	54	51	49	50	46	52	46	52	49	47	50	47	58	48	46	48	49	60
Don't know	7	4	6	3	5	5	8	6	14	10	4	2	6	9	6	6	7	10	3	6

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	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

How much responsibility, if any, do you think each of the below groups have in ensuring that hospitality businesses recover from the economic impact of the coronavirus pandemic?

Central government

A great deal	34	24	49	31	39	29	35	33	40	34	34	31	36	31	34	32	30	36	39	46
A fair amount	36	40	32	47	43	34	33	39	26	36	38	38	37	34	35	36	37	34	40	32
TOTAL A GREAT DEAL/ A FAIR AMOUNT	70	64	81	78	82	63	68	72	66	70	72	69	73	65	69	68	67	70	79	78
Not very much	14	22	8	13	9	21	17	11	10	12	15	19	14	14	9	18	16	12	11	7
None at all	4	5	2	1	2	5	5	3	6	4	4	3	4	4	8	3	4	4	4	3
TOTAL NOT VERY MUCH/ NONE AT ALL	18	27	10	14	11	26	22	14	16	16	19	22	18	18	17	21	20	16	15	10
Don't know	12	9	10	9	7	11	10	15	19	15	9	8	9	16	14	11	13	15	7	11

Local government

A great deal	22	19	27	18	20	22	21	23	31	20	23	21	22	22	26	20	18	25	24	45
A fair amount	42	43	43	49	49	38	42	41	29	44	44	42	44	39	37	44	43	38	51	31
TOTAL A GREAT DEAL/ A FAIR AMOUNT	64	62	70	67	69	60	63	64	60	64	67	63	66	61	63	64	61	63	75	76
Not very much	18	22	17	18	18	23	20	17	11	16	20	24	21	15	19	20	20	18	11	13
None at all	5	6	1	3	3	6	6	4	4	5	6	4	4	6	5	5	6	3	5	2
TOTAL NOT VERY MUCH/ NONE AT ALL	23	28	18	21	21	29	26	21	15	21	26	28	25	21	24	25	26	21	16	15
Don't know	13	9	12	12	9	10	11	15	24	15	8	9	10	17	14	11	13	16	9	9

Consumers

A great deal	20	23	20	24	19	23	19	20	16	15	24	24	20	19	17	21	18	22	16	12
A fair amount	49	56	48	51	54	53	48	51	36	49	52	55	51	48	50	49	49	47	55	58
TOTAL A GREAT DEAL/ A FAIR AMOUNT	69	79	68	75	73	76	67	71	52	64	76	79	71	67	67	70	67	69	71	70
Not very much	14	11	16	13	14	13	17	12	20	15	13	11	15	13	13	15	15	13	18	15
None at all	5	3	6	2	5	3	6	4	7	6	3	3	5	5	7	5	6	3	4	7
TOTAL NOT VERY MUCH/ NONE AT ALL	19	14	22	15	19	16	23	16	27	21	16	14	20	18	20	20	21	16	22	22
Don't know	12	8	10	10	8	9	10	13	22	15	8	6	9	15	13	10	13	15	7	9

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	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

Hospitality businesses themselves

A great deal	34	43	31	37	34	42	39	30	25	28	41	43	36	32	30	38	29	33	38	44
A fair amount	45	42	50	49	50	41	41	49	43	45	47	44	46	44	50	43	46	43	48	44
TOTAL A GREAT DEAL/ A FAIR AMOUNT	79	85	81	86	84	83	80	79	68	73	88	87	82	76	80	81	75	76	86	88
Not very much	8	6	8	8	8	7	10	6	11	11	4	6	9	7	10	8	8	8	8	2
None at all	1	1	1	0	1	1	2	1	1	2	1	1	1	2	3	1	2	1	0	1
TOTAL NOT VERY MUCH/ NONE AT ALL	9	7	9	8	9	8	12	7	12	13	5	7	10	9	13	9	10	9	8	3
Don't know	11	8	11	6	7	9	9	14	19	14	8	6	8	16	7	11	15	14	5	9

Charities

A great deal	4	5	4	2	3	4	4	3	9	3	2	4	3	5	8	2	4	5	0	0
A fair amount	10	10	11	8	10	10	10	10	8	10	9	12	9	11	14	9	10	10	9	11
TOTAL A GREAT DEAL/ A FAIR AMOUNT	14	15	15	10	13	14	14	13	17	13	11	16	12	16	22	11	14	15	9	11
Not very much	36	39	35	39	36	37	37	35	37	36	35	37	38	33	30	41	35	33	37	30
None at all	32	31	35	36	37	32	34	31	17	32	40	30	34	29	30	33	32	31	35	46
TOTAL NOT VERY MUCH/ NONE AT ALL	68	70	70	75	73	69	71	66	54	68	75	67	72	62	60	74	67	64	72	76
Don't know	18	15	14	15	14	16	15	21	28	19	13	17	15	22	19	15	20	22	18	13

How worried are you, if at all, about the possibility that businesses in each of the following sectors could permanently close as a result of the coronavirus pandemic?

Pubs, restaurants, cafes

Very worried	14	15	16	8	14	15	15	14	22	11	16	15	15	13	20	12	13	17	16	7
Fairly worried	41	40	43	54	47	37	39	42	39	38	42	44	44	37	39	42	40	39	42	46
TOTAL VERY/ FAIRLY WORRIED	55	55	59	62	61	52	54	56	61	49	58	59	59	50	59	54	53	56	58	53
Not very worried	27	28	27	28	27	30	29	25	20	28	26	28	27	26	26	28	29	24	28	21
Not at all worried	8	8	5	5	6	9	8	8	2	8	9	9	7	9	6	8	9	6	7	17
TOTAL NOT VERY / NOT AT ALL WORRIED	35	36	32	33	33	39	37	33	22	36	35	37	34	35	32	36	38	30	35	38
Don't know	11	8	9	5	7	9	10	11	17	15	7	4	8	14	9	9	10	15	7	9

Holiday accommodation and tourist attractions

Very worried	11	12	13	4	11	11	10	11	14	8	11	12	10	12	15	9	8	13	14	5
Fairly worried	35	35	35	48	39	33	35	36	29	35	37	37	38	32	35	37	32	35	36	37
TOTAL VERY/ FAIRLY WORRIED	46	47	48	52	50	44	45	47	43	43	48	49	48	44	50	46	40	48	50	42
Not very worried	31	33	35	32	33	34	33	30	26	30	32	34	33	29	33	35	31	29	26	28
Not at all worried	12	11	9	9	10	13	13	12	14	12	12	11	13	12	9	11	18	9	14	24
TOTAL NOT VERY / NOT AT ALL WORRIED	43	44	44	41	43	47	46	42	40	42	44	45	46	41	42	46	49	38	40	52
Don't know	11	9	8	7	7	10	10	11	17	14	7	5	8	15	9	9	12	15	10	6

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	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

Imagine that the rate of VAT for hospitality and tourism was kept at a reduced level of 12.5% beyond April 2022.

Do you think this would generally have a positive or negative impact on each of the following, or would it make no difference?

Your local high street

Very positive impact	19	20	21	13	17	22	17	20	19	15	18	25	18	19	19	18	18	19	19	24
Fairly positive impact	37	40	38	37	41	39	35	39	19	35	43	42	39	34	40	38	35	37	33	38
TOTAL POSITIVE IMPACT	56	60	59	50	58	61	52	59	38	50	61	67	57	53	59	56	53	56	52	62
Make no difference	22	25	18	24	23	23	27	16	20	21	23	23	23	19	17	23	23	19	24	27
Fairly negative impact	4	3	2	8	3	3	4	4	4	6	2	2	4	3	2	4	3	4	3	2
Very negative impact	1	1	2	0	1	1	1	2	2	2	1	1	1	2	2	1	1	1	4	0
TOTAL NEGATIVE IMPACT	5	4	4	8	4	4	5	6	6	8	3	3	5	5	4	5	4	5	7	2
Don't know	18	11	19	19	16	12	15	21	35	22	13	8	15	22	21	16	20	19	17	9

The hospitality industry

Very positive impact	21	23	24	14	21	26	21	22	18	17	23	29	22	20	22	21	20	23	20	30
Fairly positive impact	42	43	42	44	47	41	40	43	30	42	44	44	45	38	45	42	39	41	45	40
TOTAL POSITIVE IMPACT	63	66	66	58	68	67	61	65	48	59	67	73	67	58	67	63	59	64	65	70
Make no difference	15	19	11	18	15	17	20	11	10	14	19	16	15	15	8	16	18	14	14	23
Fairly negative impact	3	2	3	5	2	3	3	3	4	4	2	2	2	3	2	4	3	2	2	1
Very negative impact	1	1	1	0	1	1	1	1	0	2	1	1	1	2	1	1	1	1	0	0
TOTAL NEGATIVE IMPACT	4	3	4	5	3	4	4	4	4	6	3	3	3	5	3	5	4	3	2	1
Don't know	18	11	19	18	15	13	16	20	39	21	12	8	14	22	20	16	19	19	19	6