Overnight Domestic Travel - Summer 2022

Presentation: 31st October 2022

UK Results

Introduction

- VisitEngland have commissioned BVA BDRC to conduct an analysis of overnight trips taken in the UK this summer
- The research seeks to understand the proportion of UK residents that took an overnight short break or holiday in the UK in Summer 2022, with comparisons to 2021, and the reasons for any differences
- This report seeks to answer this objective through a combination of direct and wider contextual information
- A broad range of data sources have been used to achieve the objective of this report, including:
    - **VisitEngland Domestic Sentiment Tracker**
    - **VisitEngland Occupancy Survey**
    - **BVA BDRC's Consumer Sentiment Tracker**
    - **BVA BDRC's Hotel Guest Survey**
    - **BVA BDRC's Holiday Trends 2022 Report**
    - **ABTA's Holiday Habits 2022 Report**
    - **Met Office data**
    - **National Trust Climate Research**
    - **ForwardKeys Air Ticket Data**

Not all data sources feature directly in the report, but all have been used to understand the broader travel context

Definitions used within this report

In this report, we look at the behaviour and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip.

- **Summer Trip-takers:** Residents of the UK who have taken an overnight short break or holiday in July to September
- **Summer Intenders:** Residents of the UK who stated they intend to take an overnight short break or holiday between July and September

We also segment respondents by life stage and use the following definitions:

- **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
- **Retirees:** Aged 65+.

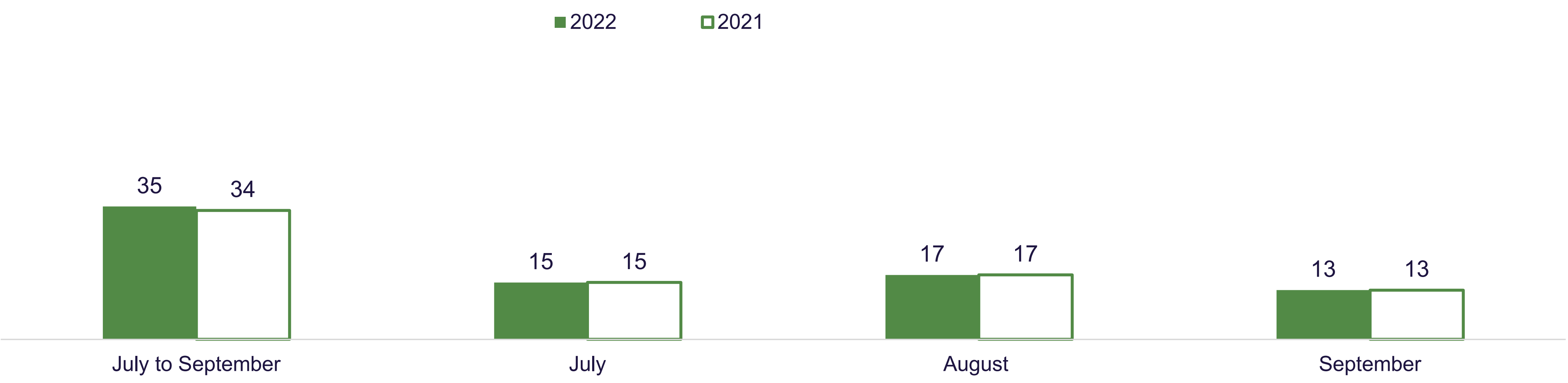
Today’s Presentation

- Introduction
- The impact of a return to overseas travel
- The 2021 ‘displacement effect’
- The influence of finances and British weather
- The Wider Context: Explaining rising occupancy data
- Day trip behaviour
- Looking ahead: How close to ‘normal’ is domestic travel?
- Summary of findings

2. Overall trends and the impact of a return to overseas travel

A near-identical proportion of the UK public took an overnight trip (domestic or overseas) this Summer as did in Summer 2021, consistent across each month.

Figure 1. Proportion taken a UK or OVERSEAS overnight trip by time period, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

However, the UK public took fewer overnight *domestic* trips this Summer than in Summer 2021, and more *overseas* trips. This suggests that overseas travel has replaced UK travel for some people.

Figure 2. Proportion taken a UK overnight trip by time period, Percentage, October fieldwork, UK

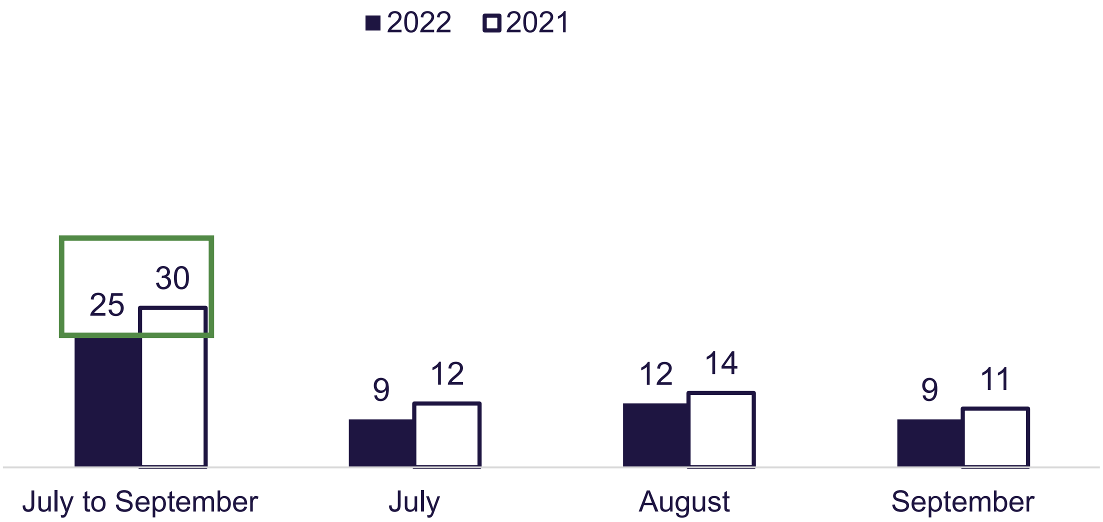
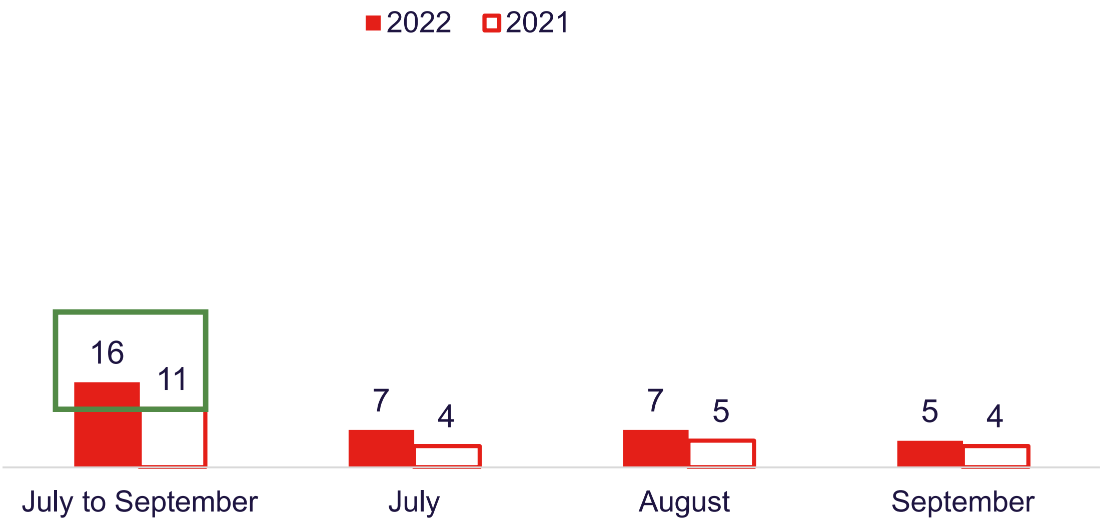


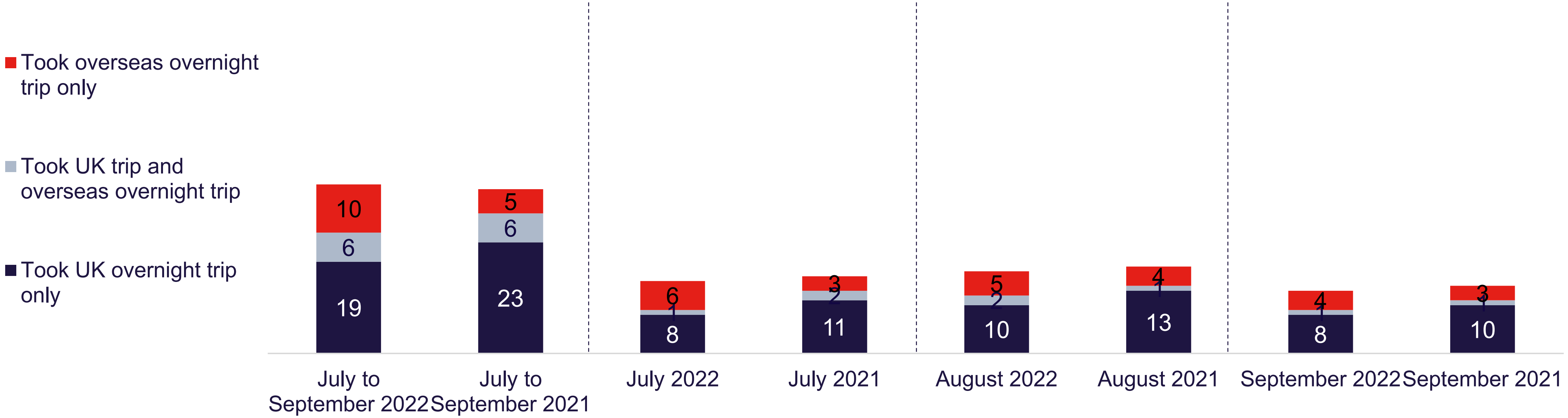
Figure 3. Proportion taken an OVERSEAS overnight trip by time period, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

The shift from UK to overseas travel appears to be driven by people only taking one type of overnight trip – those 'only taking a UK trip' in 2021 higher than those 'only taking a UK trip' in 2022.

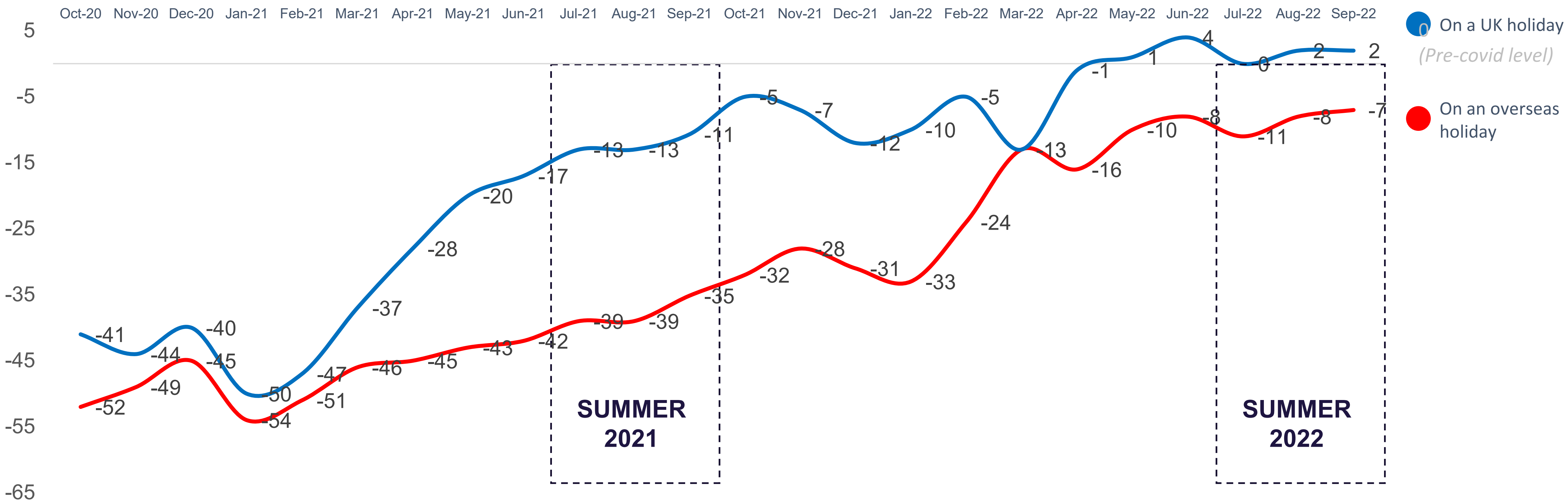
Figure 4. Proportion taken a UK and/or OVERSEAS overnight trips by time period, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

The rebalancing of domestic and international travel aligns with increasing comfort levels with taking an overseas holiday this summer – almost in line with UK and pre-pandemic levels.

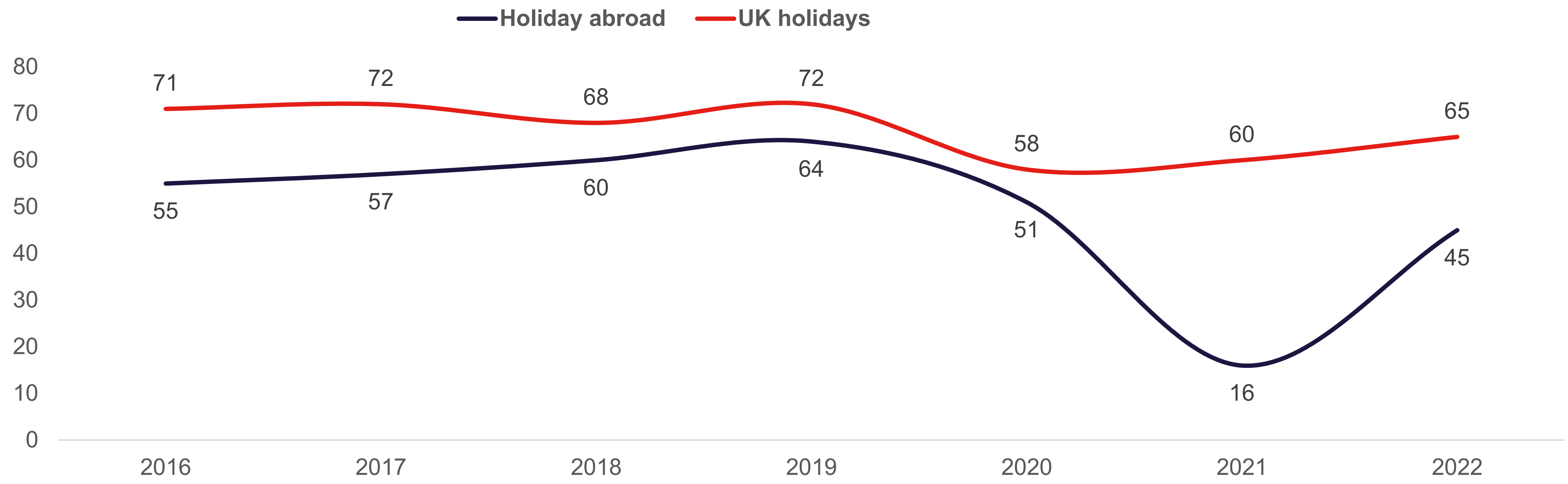
Figure 5. The 'comfort gap' = the difference between comfort levels with an activity now and before the pandemic, Net difference, UK



Source: BVA BDRC Consumer Sentiment tracker
Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances.
Base: All months n=c.1,750

The ABTA Holiday Habits report (which looks at trips taken in the last 12 months) also supports the argument that overseas travel has rebounded.

Figure 7. 'Holidays' taken in the last 12 months, Percentage, Year-on-year, September fieldwork, UK



Source:: ABTA Holiday Habits Survey
Base: n=c.2,000 each year

The switch to overseas travel is driven by most life stages taking more overseas trips compared to 2021 and families maintaining their overseas travel but taking fewer domestic trips.

Figure 8. Overnight UK trips taken this summer by life stage, Percentage, October fieldwork, UK

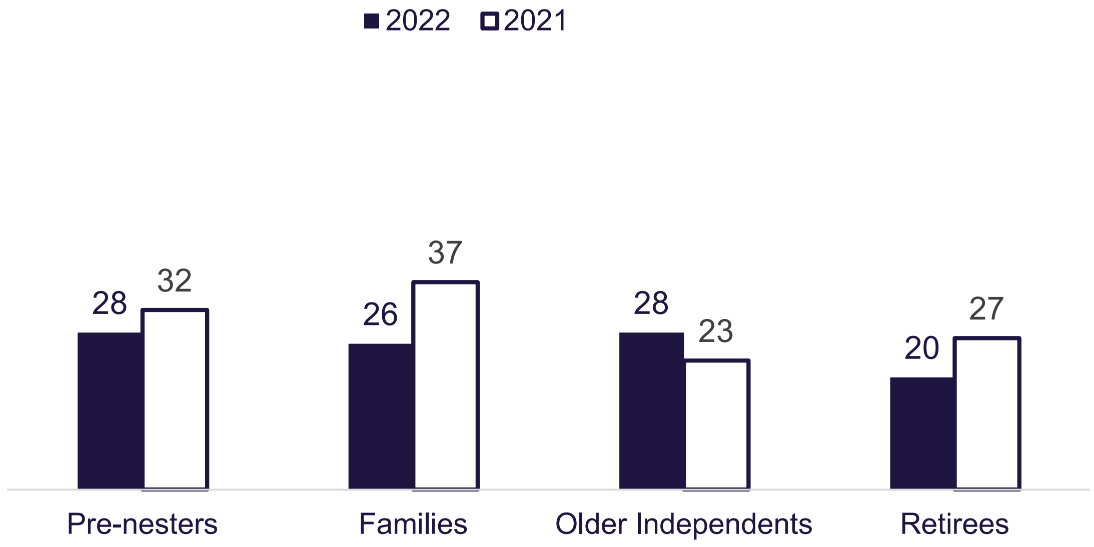
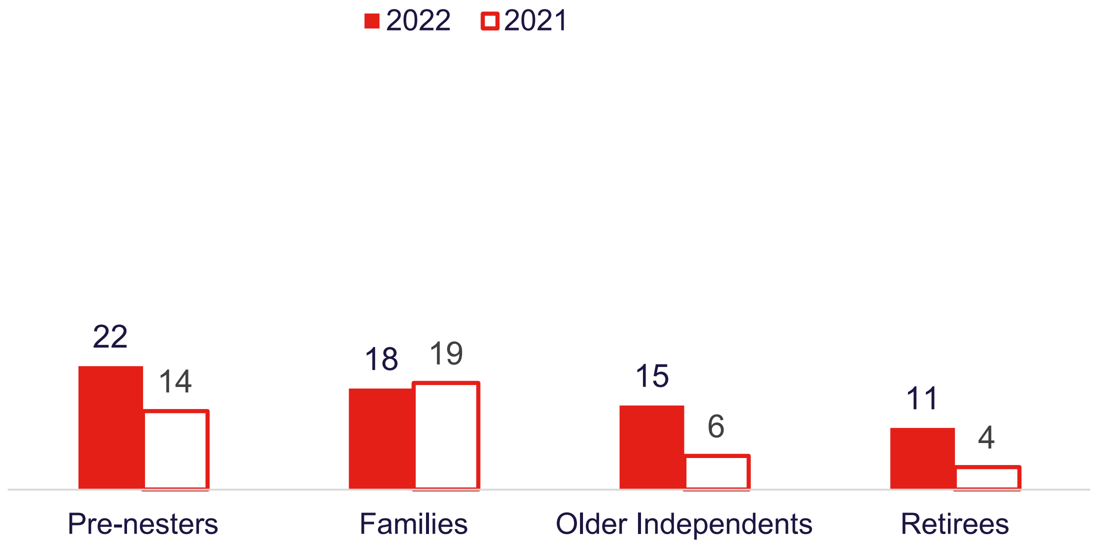


Figure 9. Overnight OVERSEAS trips taken this summer by life stage, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: All respondents. October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirees n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirees n=219

Most social grades – with the exception of family-dominated ABs – are more likely to have taken an overseas short break or holiday this year. All are less likely to have taken a domestic overnight trip.

Figure 10. Overnight UK trips taken this summer by social grade, Percentage, October fieldwork, UK

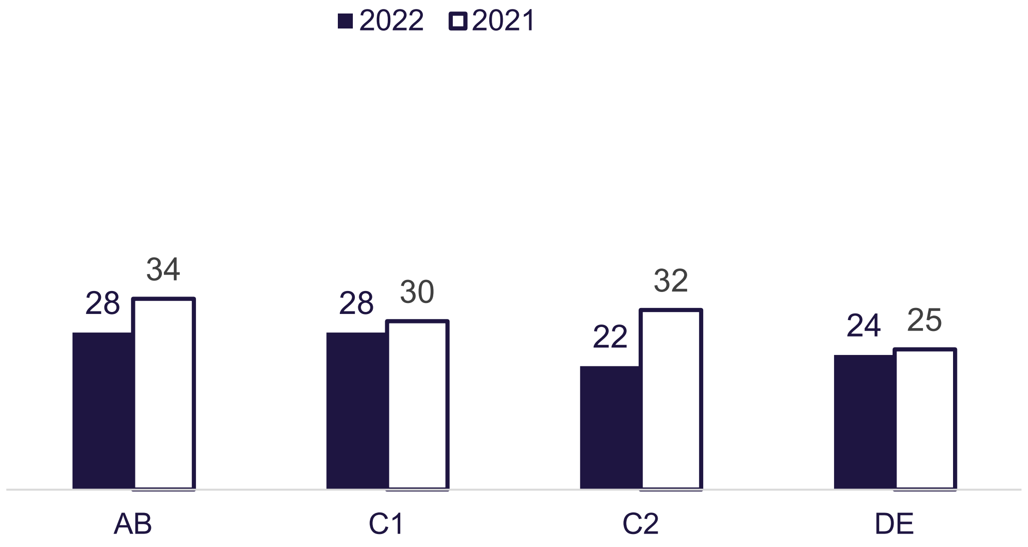
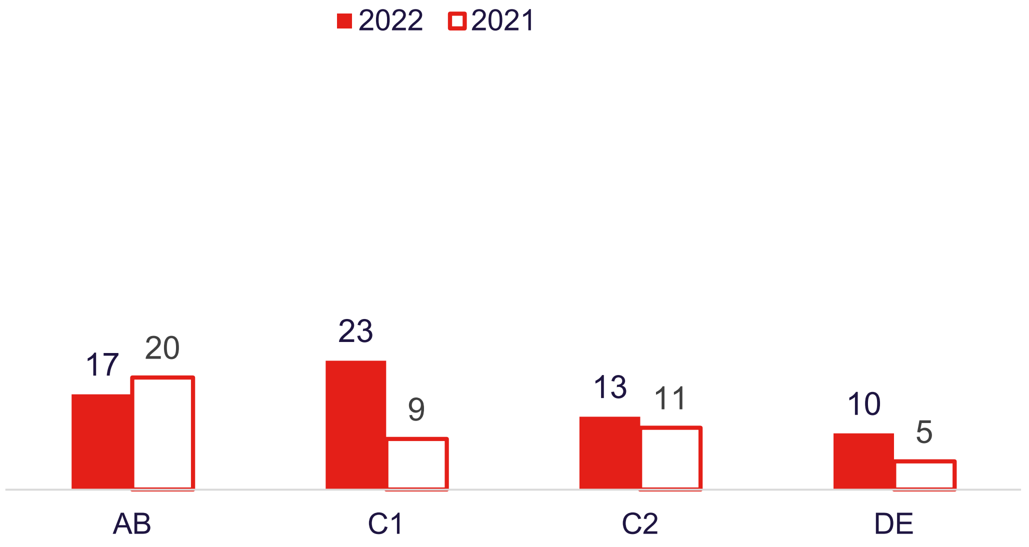


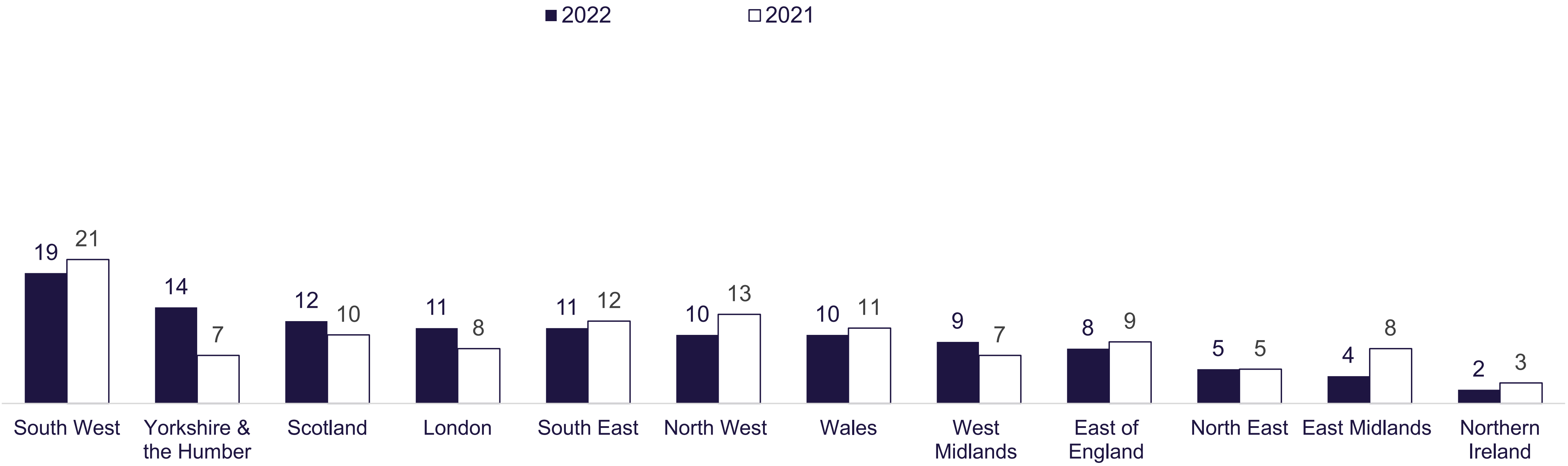
Figure 11. Overnight OVERSEAS trips taken this summer by social grade, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: All respondents. 2022 Social grade AB n=570; C1 n=235; C2 n=345; DE n=606; 2021 Social grade AB n=451; C1 n=313; C2 n=379; DE n=615

Compared to 2021 there are some minimal differences in destinations stayed in - the biggest increase in Yorkshire & The Humber (which fits with England Occupancy data). Aligned with industry feedback, the South West experienced a small drop, which may be driven by a movement to seaside holidays overseas, rather than in the UK.

Figure 12. Where stayed on most recent UK overnight trip between July and August*, Percentage, September fieldwork*, UK



Source: VisitEngland Domestic Sentiment Tracker
VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>?
Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
Base: Summer trip takers (September fieldwork) 2022 n=409; 2021 n=396. September used to ensure a like-for-like comparison with 2021

The slight drop in trips to South West is potentially driven by fewer families, whilst the rise in Yorkshire & The Humber is driven by the rise in Older Independents.

Tables 1-4. Top 5 destinations stayed on most recent UK overnight trip between July and August*, Percentage, September fieldwork, UK

Pre-Nesters	
South West	22%
Yorkshire & the Humber	15%
London	15%
North West	14%
Wales	11%

Families	
South West	20%
North West	16%
East of England	14%
London	13%
Wales	12%

Older Independents	
South West	15%
West Midlands	15%
Yorkshire & the Humber	15%
London	13%
Scotland	11%

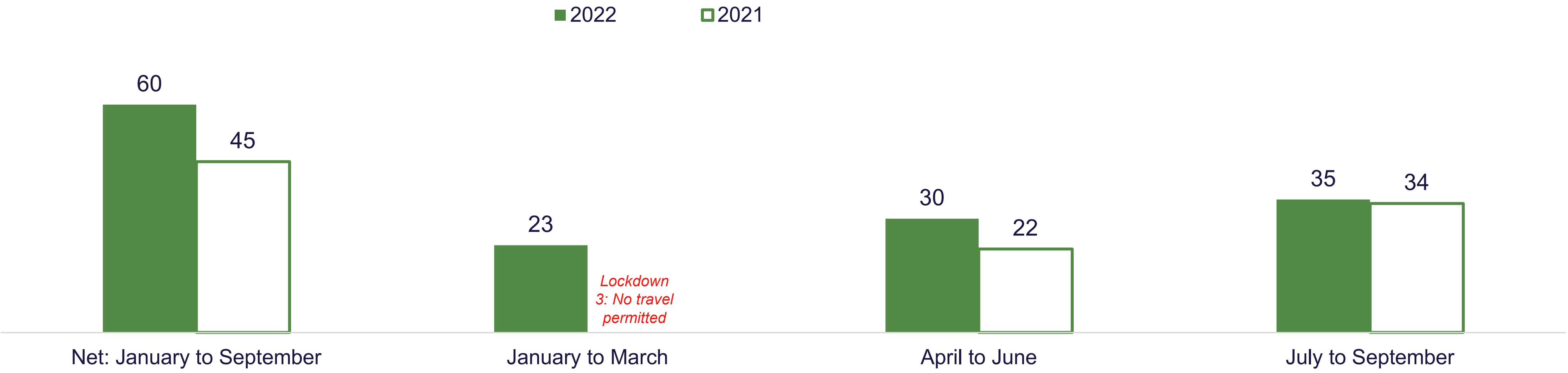
Retirees	
Scotland	21%
South West	19%
Yorkshire & the Humber	14%
South East	12%
Wales	9%

Source: VisitEngland Domestic Sentiment Tracker
VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>?
Base: Summer trip takers (September fieldwork) re-nesters n=94; Families n=171; Older Independents n=88; Retirees n=56
Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

3. The 2021 ‘displacement effect’

Although a switch to international travel is a clear driver of fewer UK trips, it's important to note that so far this year, the UK public have taken more overnight trips in total than in 2021.

Figure 13. Proportion taken a UK or OVERSEAS overnight trip by time period, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

This is the case with UK trips as well as overseas trips, suggesting that the drop in 2022 may partly be due to a ‘squeezed’ trip-taking window in 2021 – government restrictions reducing travel in the first six months of the year.

Figure 14. Proportion taken a UK overnight trip by time period, Percentage, October fieldwork, UK

Figure 15. Proportion taken an OVERSEAS overnight trip by time period, Percentage, October fieldwork, UK

Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

4. The influence of finances and British weather

There was a significant drop-off in intention to take a domestic short break/holiday against intentions this summer – a drop-off not apparent in summer 2021, earlier in 2022 or with summer overseas travel. This suggests that circumstances may have also driven a drop in domestic trips.

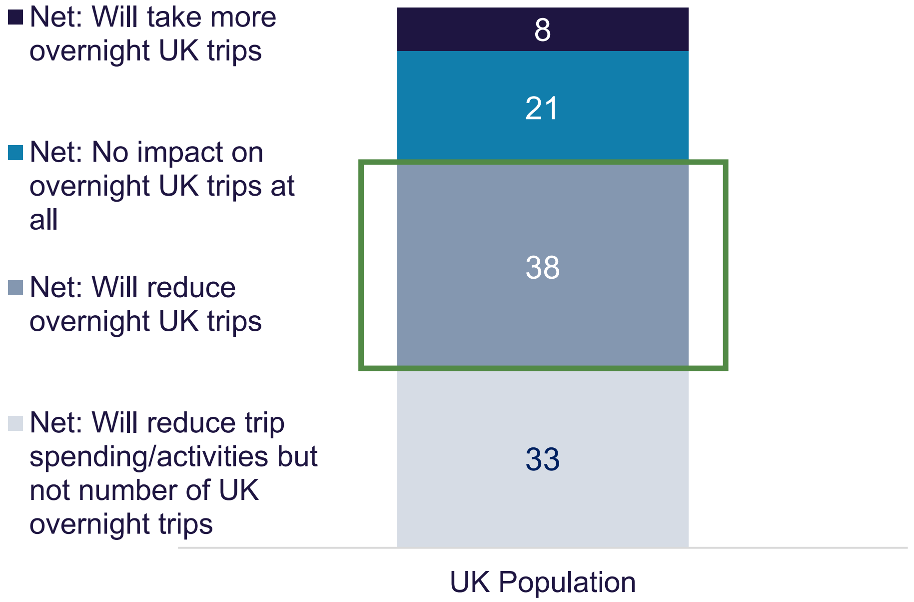
Figure 16. Overnight UK trips taken compared to trips intended with 2021 comparison, Percentage, October fieldwork, UK

Source: VisitEngland Domestic Sentiment Tracker
Trip-takers: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Intenders: QVB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All trips taken data (October 2022 fieldwork) = 1,756, Trips intenders: July to September (June fieldwork n=c.1,750) April to June (March fieldwork n=c.1,750) January to March (December fieldwork n=c.1,750)

The 'cost of living' crisis may be one of these circumstances – back in July this year 38% stating they will reduce the number of domestic trips as a result of financial pressures.

Figure 19. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Full list

Figure 20. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Net



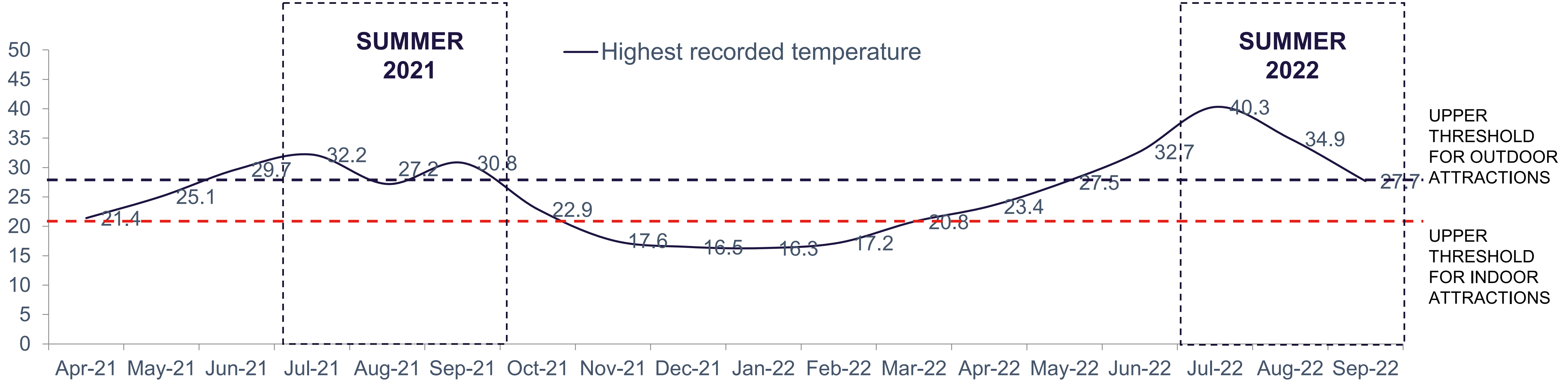
Source: VisitEngland Domestic Sentiment Tracker
Question: VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?
Base: July to September n=5,274

The UK's weather may also have played a role in driving behaviour. National Trust climate research indicates that this summer's hot weather crossed thresholds that make both indoor and outdoor activity less likely.

National Trust Climate Research

- The optimum weather for a National Trust day out is 21C
- People flock to outdoor locations (particularly coastal locations) on hotter days – but numbers dramatically drop off at 28C for most outdoor sites
- The ideal temperature for visiting indoor locations is 20C degrees, but above this the number of people visiting historic houses starts to fall.

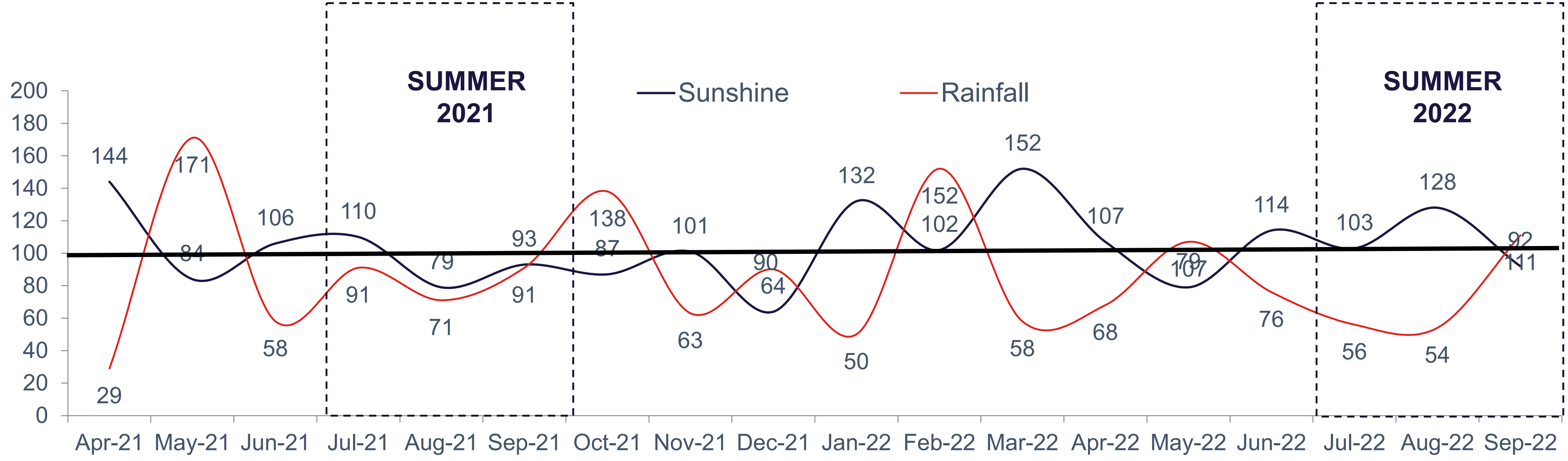
Figure 21. Highest recorded temperatures by month, Degrees Celsius, UK



Source: Met Office

The potential impact of weather is also supported by high Summer 2022 sunshine averages against the 20 year average, potentially coupled with below average sunshine in 2021 putting people off a 2022 trip.

Figure 22. Percentage of sunshine and rainfall compared to 1991 to 2020 average, Percentage, UK



Source: Met Office

5. The Wider Context: Explaining rising occupancy data

The England Occupancy Survey (which looks predominantly at hotels) reports an increase in occupancy levels in Summer 2022 compared to Summer 2021 – driven by London and cities/large towns.

Figure 23. Overall occupancy levels in July to September, England

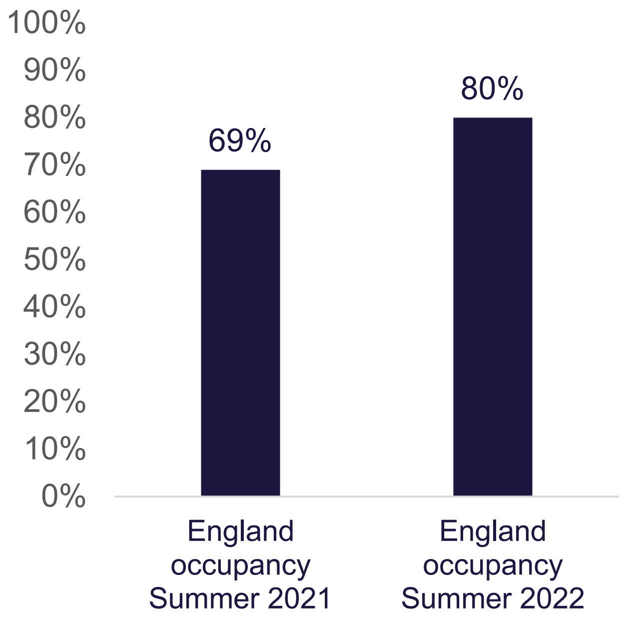


Figure 24. Overall occupancy levels in Summer by England region, England

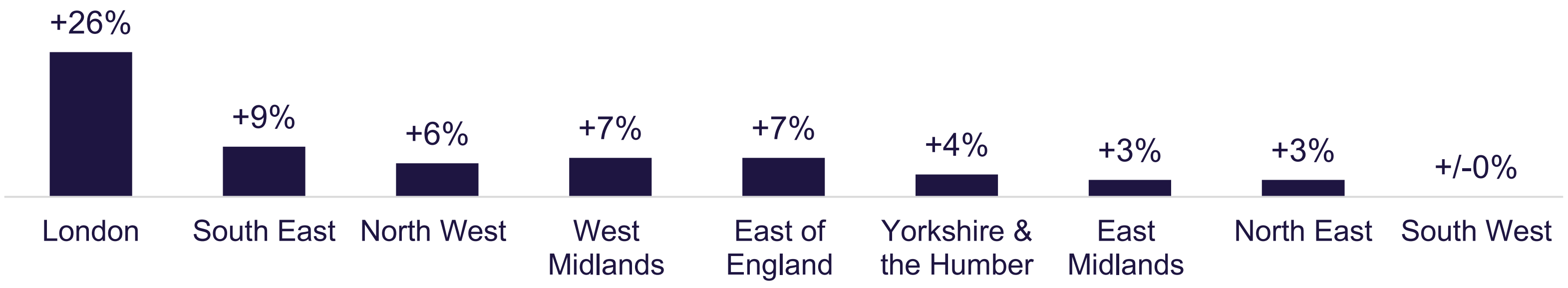
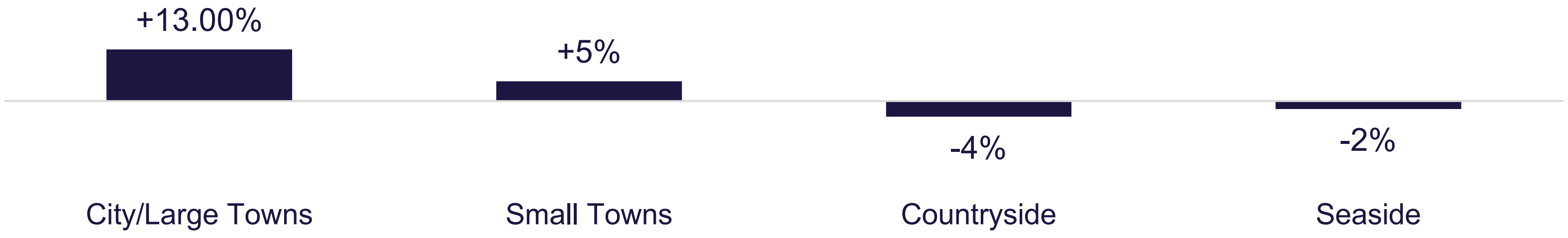


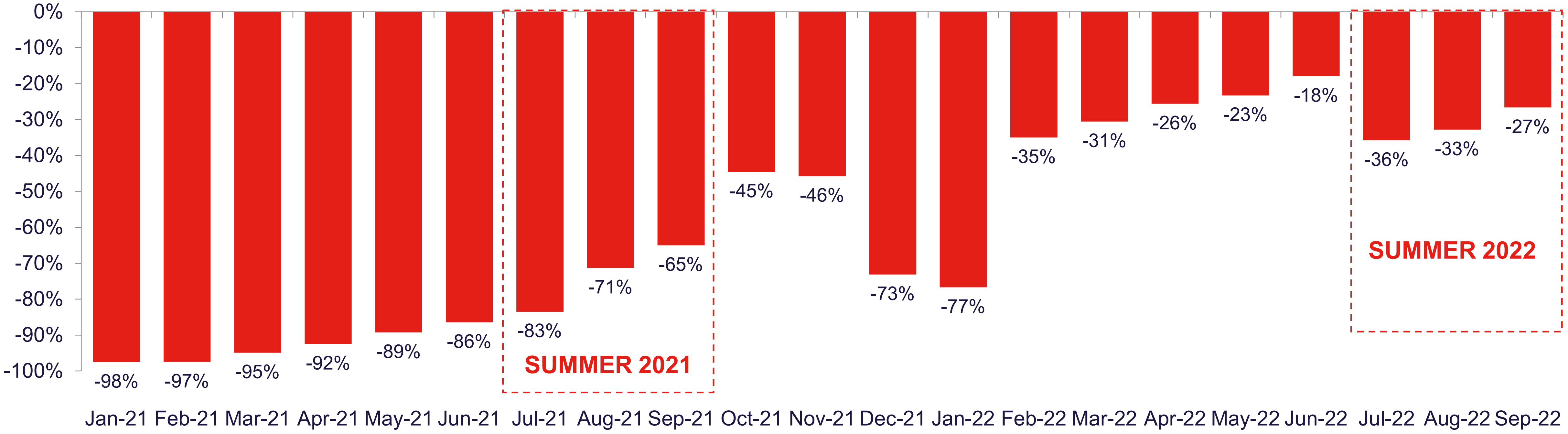
Figure 25. Overall occupancy levels in Summer by destination type, England



Source: England Occupancy Survey

Rising occupancy will, at least in part, be driven by significantly higher inbound visits relative to 2021 – particularly for cities and large towns such as London.

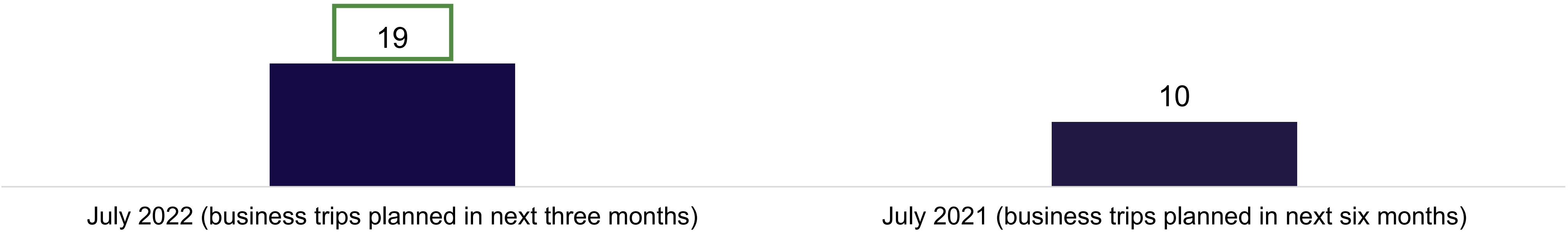
Figure 26. Flight bookings made to UK vs. those made the same time in 2019, Percentage, Global



Source: ForwardKeys Air Ticket Data

A rise in business travel may have also driven occupancy levels – research indicating increasing intentions since 2021.

Figure 27. Proportion anticipating an overnight business trip, Percentage, July 2022 and July 2021, U.K. adults in employment*



Source: VisitEngland Domestic Sentiment Tracker
Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months (2021 asked 'by the end of the year')? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer 'no'. Please also answer 'no' if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office). Base: July 2022 respondents currently in employment n = 1,313. July 2021 respondents currently in employment n=1,3333 *Note: Different timeframes

Shifts in life stage representation may also partly explain rises in hotel occupancy – Older Independents (which have increased) more likely to stay in a hotel/motel/inn than Families (which have decreased).

Tables 5-8. Top 5 accommodation types intending to stay in for UK summer overnight trip by life stage, Percentage, June fieldwork, UK

Pre-Nesters	
Hotel / Motel / Inn	42%
Friends or relatives' home	35%
Guest house / Bed and breakfast	19%
Stayed in a rented house/cottage/lodge or similar	16%
Static caravan - not owned by you	13%

Families	
Hotel / Motel / Inn	32%
Static caravan - not owned by you	26%
Friends or relatives' home	22%
Guest house / Bed and breakfast	15%
In someone else's home on a commercial basis – rental of full property (e.g. AirBnB)	14%

Older Independents	
Hotel / Motel / Inn	34%
Friends or relatives' home	26%
Static caravan - not owned by you	17%
Stayed in a rented house/cottage/lodge or similar	16%
Guest house / Bed and breakfast	16%

Retirees	
Hotel / Motel / Inn	41%
Friends or relatives' home	11%
Static caravan - not owned by you	13%
Stayed in a rented house/cottage/lodge or similar	9%
Guest house / Bed and breakfast	13%

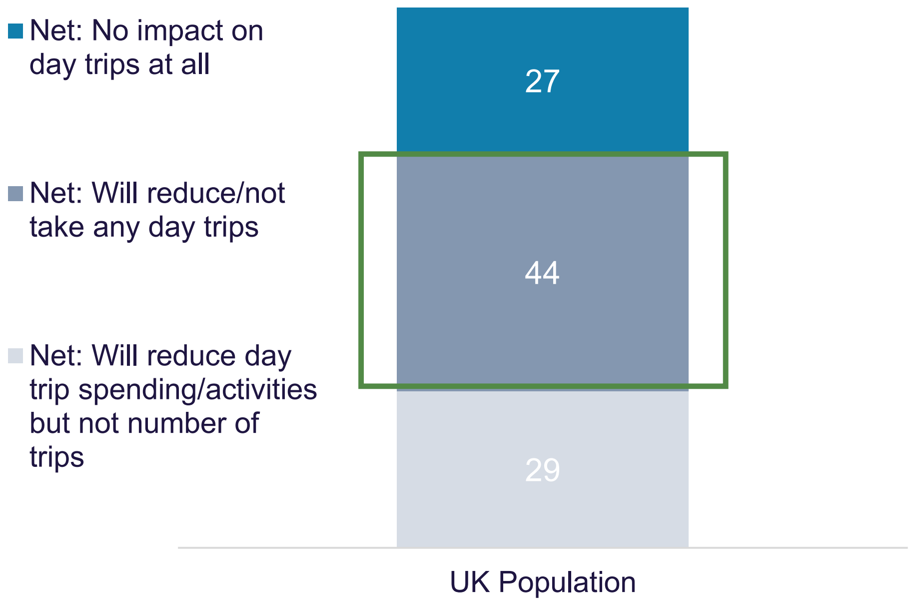
Source: VisitEngland Domestic Sentiment Tracker
VB6a. What type/s of accommodation do you expect to be staying in during your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
All summer intenders (June fieldwork). Pre-nesters n=173; Families n=296; Older Independents n=162; Retirees n=101
Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

6. Day trip behaviour

The ‘cost of living’ crisis has also had an impact on day trips – 44% of the public stating they will reduce or stop taking them.

Figure 28. ‘Cost of living’ impact on UK day trips, Percentage, July and August fieldwork, UK, Full list

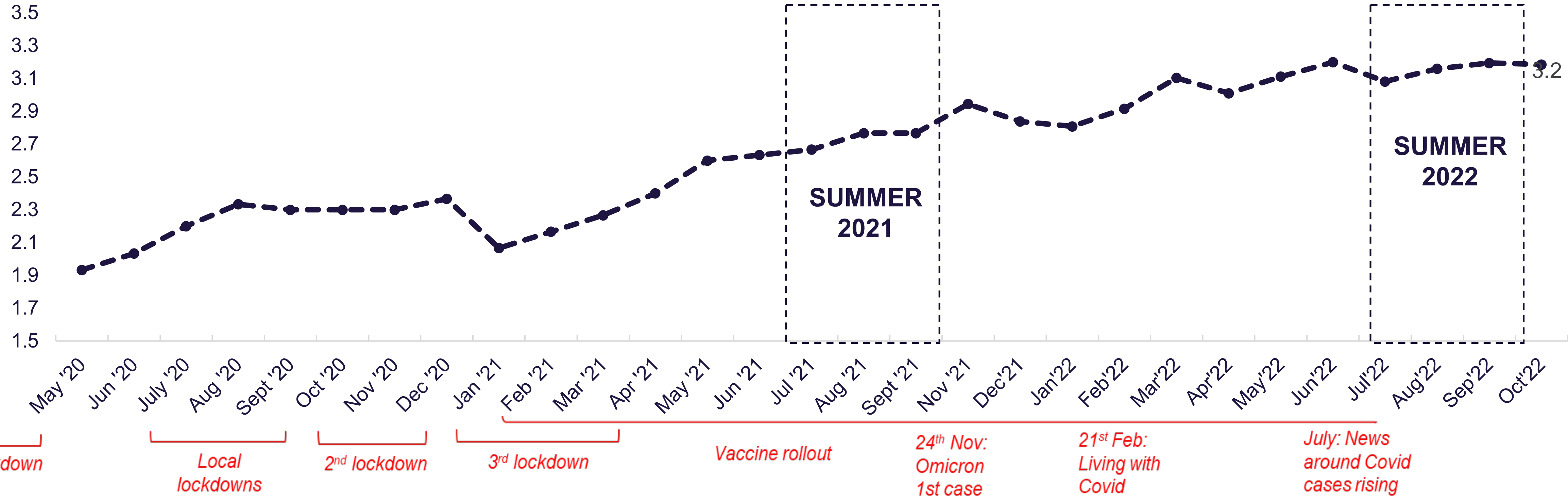
Figure 29. ‘Cost of living’ impact on UK day trips, Percentage, July and August fieldwork, UK, Net



Source: VisitEngland Domestic Sentiment Tracker
Question: VB7c. How, if at all, would you say the ‘cost of living crisis’ is likely to influence your UK day trips in the next six months?
Base: July to August n=3,500

However, the impact of finances in reducing day trips is counter-balanced by a public increasingly 'comfortable' with everyday activities.

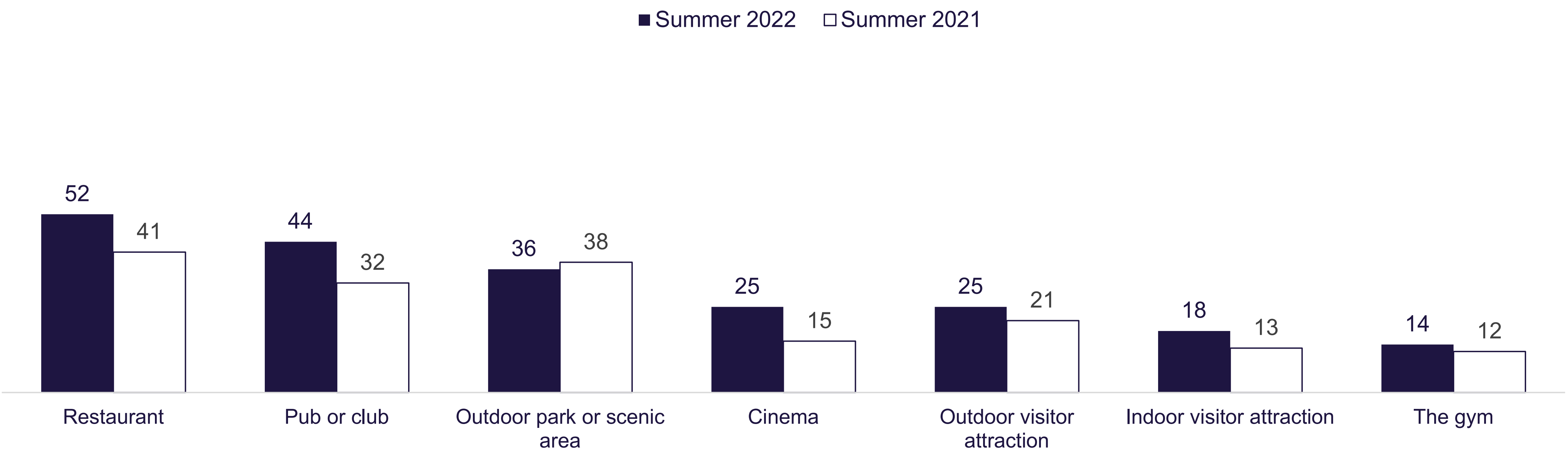
Figure 30. Level of comfort conducting a range of activities, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. October 2022 = 1,756 All other months n=c,1750

As a result, BVA BDRC data reports a rise in most day-trip activities compared to 2021, with the exception of trips to ‘outdoor parks or scenic areas’ – a destination type that was popular throughout the pandemic.

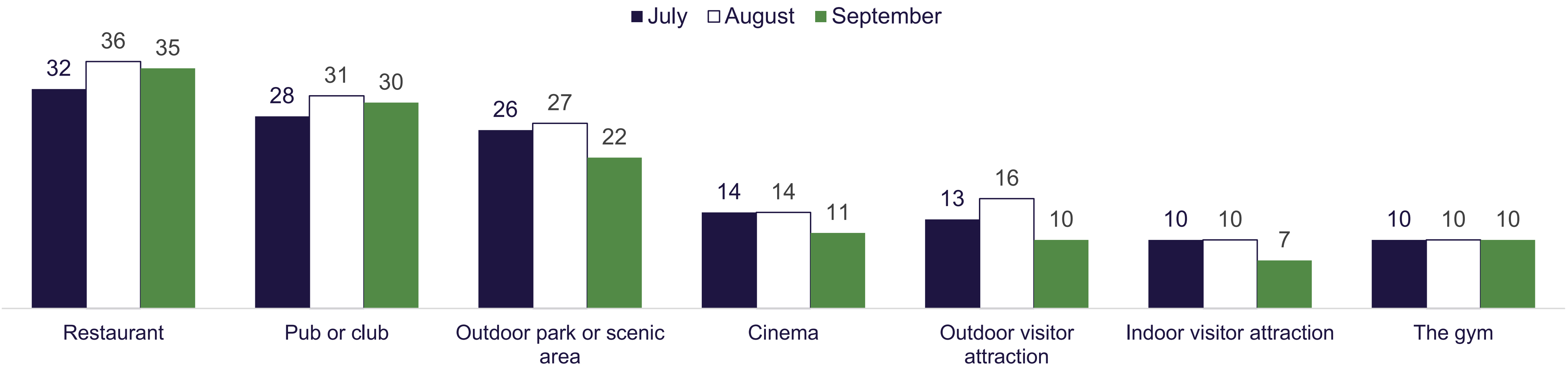
Figure 31. Leisure destination visited between July and September, Percentage, October fieldwork UK



Source: BVA BDRC Clearsight consumer sentiment tracker
Q1: Which, if any, of the following activities have you conducted since the beginning of the first lockdown? Q1a. When have you done the following activity/activities?
Base: n=1,756

Activity was relatively consistent across summer months with a general – unsurprising - trend of more activity in August.

Figure 32. Leisure destination visited between July and September by month, Percentage, October fieldwork, UK

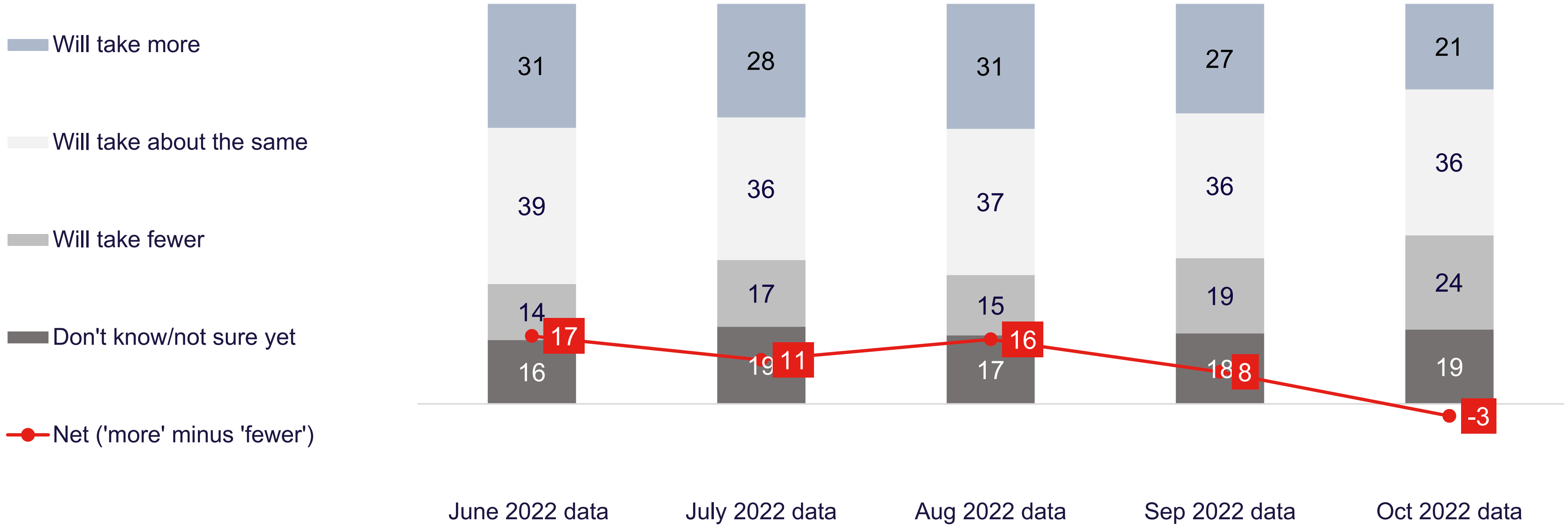


Source: BVA BDRC Clearsight consumer sentiment tracker
Q1: Which, if any, of the following activities have you conducted since the beginning of the first lockdown? Q1a. When have you done the following activity/activities?
Base: n=1,756

7. Looking ahead: How close to 'normal' is domestic travel?

October fieldwork suggests that domestic overnight travel is returning to pre-pandemic levels.

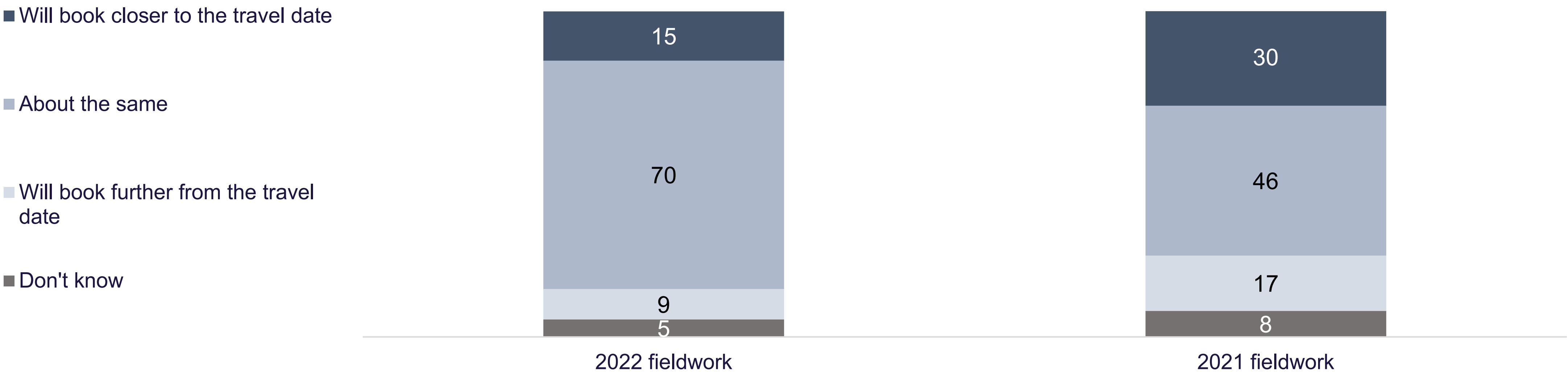
Figure 33. Number of UK overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, October 2022, UK



Source: VisitEngland Domestic Sentiment Tracker
VB6a. What type/s of accommodation do you expect to be staying in during your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
All summer intenders (June fieldwork). Pre-nesters n=173; Families n=296; Older Independents n=162; Retirees n=101
Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

Booking patterns are also more in line with pre-pandemic than in 2021.

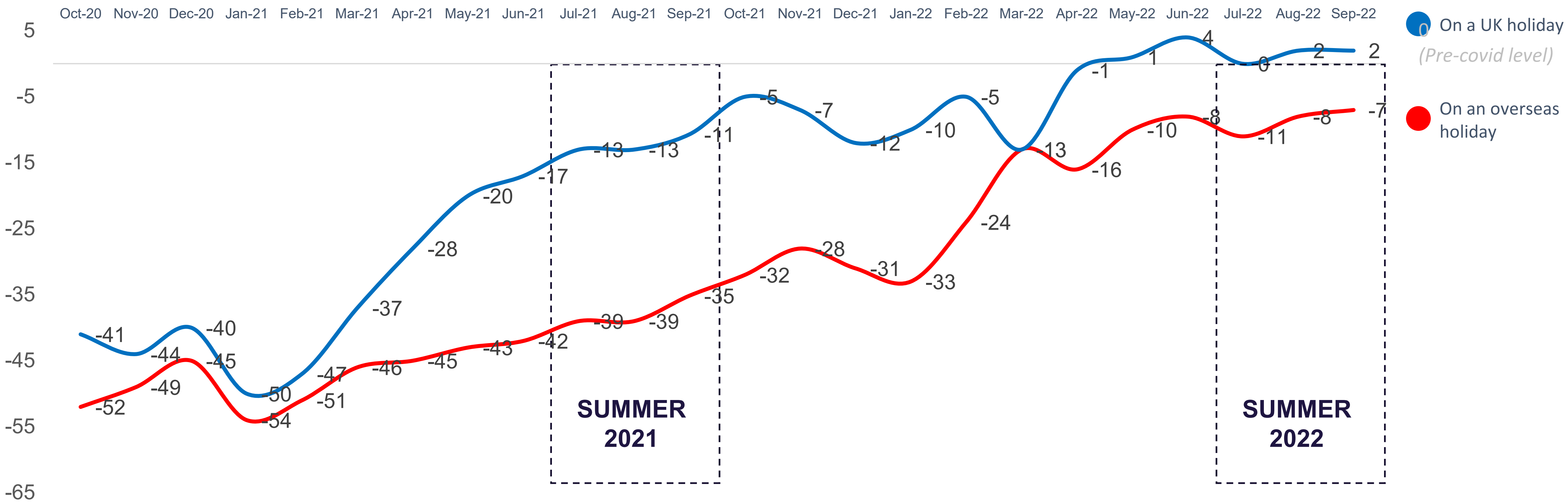
Figure 34. Anticipated booking lead times for summer trips compared to before the pandemic, Percentage, May 2022 and June 2021 fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
2022 fieldwork question = V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? 2021 fieldwork question = VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base : 2022 fieldwork n=498; 2021 fieldwork n=526

As illustrated earlier in this report, comfort levels indicate overseas travel is a more appealing prospect than at any point since the start of the pandemic. This suggests the domestic/international balance is close to normality.

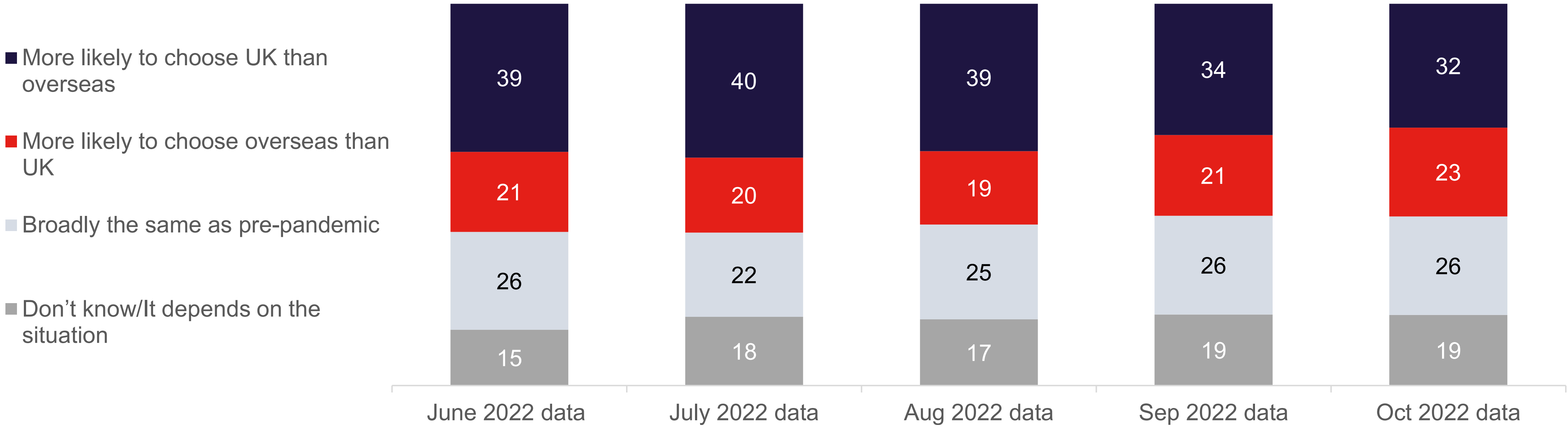
Figure 35. The ‘comfort gap’ = the difference between comfort levels with an activity now and before the pandemic, Net difference, UK



Source: BVA BDRC Consumer Sentiment tracker
Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances.
Base: All months n=c.1,750

The likelihood to choose UK instead of overseas relative to pre-pandemic is also declining – further suggesting the domestic/international balance is close to normal. However, domestic trips are still preferred.

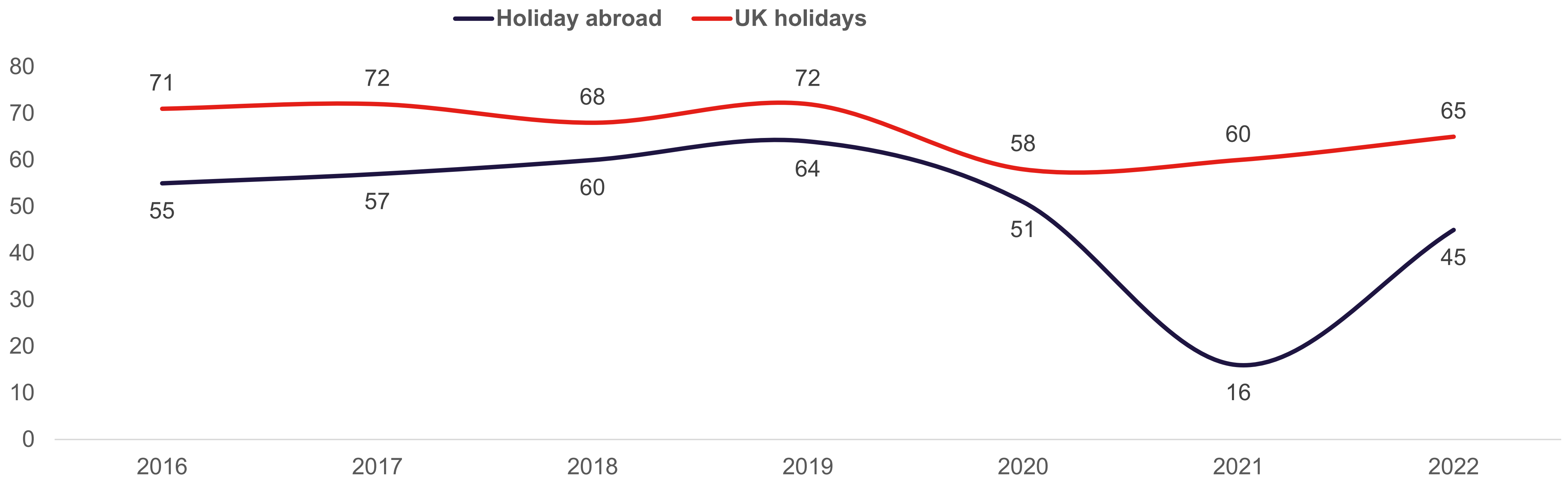
Figure 36. Difference in short break/holiday choices in the next 6 months compared to pre-pandemic, Percentage, October 2022, UK



Question: VB2j. Thinking of the next 6 months, how different do you think your short break/holiday choices will be compared to before the COVID-19 pandemic?
Base: All respondents. October 2022 = 1,756. Other months n=c.1,750

The ABTA Holiday Habits report also highlights there is still some scope to close the gap.

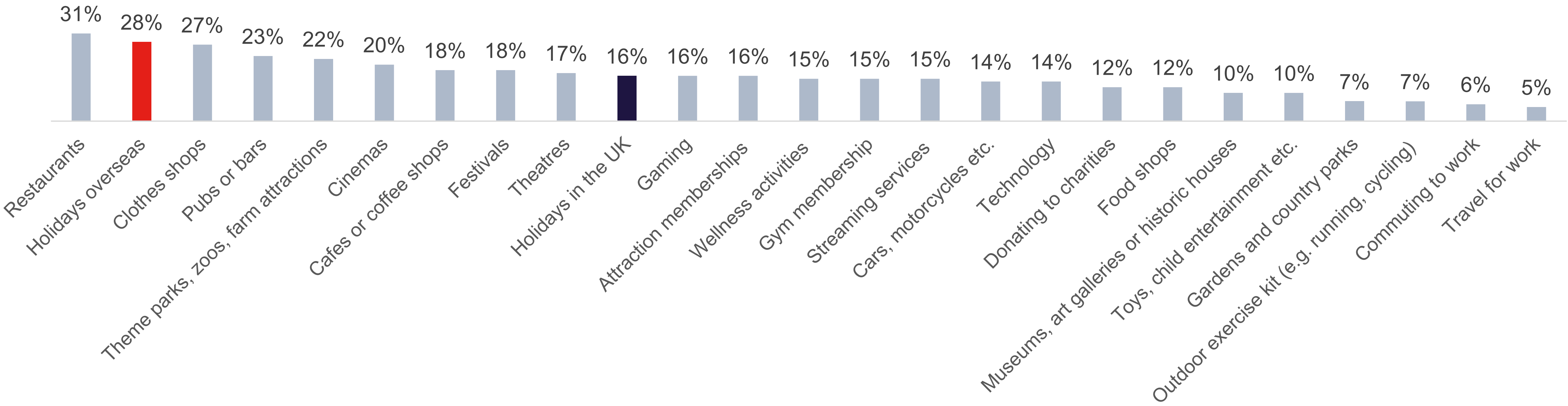
Figure 7. 'Holidays' taken in the last 12 months, Percentage, Year-on-year, September fieldwork, UK



Source:: ABTA Holiday Habits Survey
Base: n=c.2,000 each year

The continued – albeit declining - preference of UK over overseas may be driven by financial pressures. Overseas holidays are more likely to be sacrificed than UK holidays due to the cost-of-living crisis. So an element of ‘staycation’ preference is likely to stay.

Figure 37. The Top 5 activities most likely to cut back on due to the ‘cost-of-living’ crisis, Percentage of all who do each activity, October fieldwork, UK



Source: BVA BDRC Consumer Sentiment tracker
The cost-of-living crisis means some people are likely to have less disposable income in the coming months. In the context of the cost-of-living crisis, if you had to cut back your disposable spending on any 5 of these, which would you choose?
Base n=1,756

8. Summary of findings

Summary of findings

The UK public took fewer overnight domestic trips in Summer 2022 than in Summer 2021. The drop was driven by…

- A switch to overseas travel in 2022
- The 'displacement effect' of a 'squeezed holiday window' in 2021
- Financial concerns due to the 'cost-of-living crisis' in 2022
- Extreme weather conditions in 2022

Whilst day trips were also likely driven down by financial pressures, increased comfort with 'everyday activities' means more day trips were taken to indoor venues in Summer 2022 than in Summer 2021.

The balance of domestic versus overseas travel is closer to pre-pandemic levels, but financial pressures mean domestic trips are still likely to be favoured as we head into 2023.

Thank you