Domestic Sentiment Tracker: September 2023

Published: 21st September 2023
Fieldwork Period: 1st to 7th September 2023

UK Results
Contents

1. Current General Sentiment (slides 6-8)
2. Trip Intentions: UK and Overseas (slides 9-19)
3. The Next Trip: Overnight and Day Trips (slides 20-28)
4. Past UK and Overseas Trips (slides 29-31)
5. Overnight Business Trip Intentions* (slides 32-33)
6. Methodology & Further Data (slides 34-36)

Note: * Overnight Business Trip Intentions questions are asked every second month
Introduction

• VisitEngland, VisitScotland and Visit Wales have commissioned a Domestic Sentiment Tracker to understand the impact of major events, such as the cost of living crisis, on the UK public's intent to take overnight trips, both within the UK and abroad.

• The survey addresses areas, such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation for their intended trip.

• This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.

• Fieldwork tends to take place at the start of each month and this wave’s fieldwork was conducted between 1st to 7th September 2023.

• The results (both, reports and data tables) are made publicly available and updated each wave at the following website:

  https://www.visitbritain.org/domestic-sentiment-tracker
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.

– **October to December 2023 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between October to December 2023

– **January to March 2024 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between January to March 2024

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 without children in household
– **Retirees**: Aged 65+
## September 2023: Scorecard of Key Metrics

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>September 2023</th>
<th>Change since August 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of UK adults stating ‘WORST IS STILL TO COME’ in regard to cost of living crisis</td>
<td>45%</td>
<td>-5%*</td>
</tr>
<tr>
<td>Proportion intending a UK overnight trip at any point in the next 12 months</td>
<td>76%</td>
<td>+2%</td>
</tr>
<tr>
<td>Proportion intending an overseas overnight trip at any point in the next 12 months</td>
<td>62%</td>
<td>+6%*</td>
</tr>
<tr>
<td>Preference for UK over overseas in the next 12 months (vs past 12 months)</td>
<td>36%</td>
<td>-2%</td>
</tr>
<tr>
<td>Took a domestic overnight trip in the past 12 months (September 2022 –August 2023)</td>
<td>65%</td>
<td>+4%*</td>
</tr>
<tr>
<td>Net proportion of UK trips in the next 12 months vs the last 12 months [% ‘more’ minus % ‘fewer’ trips]</td>
<td>4%</td>
<td>-2%</td>
</tr>
<tr>
<td>Net proportion of overseas trips in the next 12 months vs the last 12 months [% ‘more’ minus % ‘fewer’ trips]</td>
<td>-20%</td>
<td>0%</td>
</tr>
<tr>
<td>Reduce the number of UK overnight trips due to cost of living crisis [NET ‘fewer’, ‘not go’, ‘go day trips instead’]</td>
<td>29%</td>
<td>-2%</td>
</tr>
<tr>
<td>Reduce the number of day trips due to cost of living crisis [NET ‘fewer’, ‘not go on day trips’]</td>
<td>32%</td>
<td>-2%</td>
</tr>
<tr>
<td>Top 3 barriers to taking a UK overnight trip in the next 6 months</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1st Rising cost of living; 2nd Personal Finances 3rd UK weather

* Represents a statistically significant change on previous wave

N/A – due to new question wording meaning comparison to last wave cannot be done
1. Current General Sentiment
Fewer than half of respondents think ‘the worst is still to come’ in relation to the cost-of-living crisis, an improvement on recent months.

Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun’22</td>
<td>UK inflation rate remained unchanged at 8.7% in May</td>
</tr>
<tr>
<td>Jul’22</td>
<td>Inflation rate falls sharply to 6.8% in July</td>
</tr>
<tr>
<td>Aug’22</td>
<td>Fuel, milk and eggs steepest increases in 40 years</td>
</tr>
<tr>
<td>Sep’22</td>
<td>UK inflation up to 10.1%, shoppers feel the inflation hit</td>
</tr>
<tr>
<td>Oct’22</td>
<td>UK inflation to 9.9% but remains close to 40-year high</td>
</tr>
<tr>
<td>Nov’22</td>
<td>UK inflation up to 10.7% but remains close to 41-year high</td>
</tr>
<tr>
<td>Dec’22</td>
<td>UK inflation to 10.7% but remains close to 41-year high</td>
</tr>
<tr>
<td>Jan’23</td>
<td>UK inflation to 10.1%</td>
</tr>
<tr>
<td>Feb’23</td>
<td>UK inflation jumps to 10.4% due to veg shortages</td>
</tr>
<tr>
<td>Mar’23</td>
<td>UK inflation to 10.1%</td>
</tr>
<tr>
<td>Apr’23</td>
<td>UK inflation fell to 8.7% in March</td>
</tr>
<tr>
<td>May’23</td>
<td>Inflation rate down to 7.9% in June</td>
</tr>
<tr>
<td>Jun’23</td>
<td>UK inflation fell to 8.7% in April</td>
</tr>
<tr>
<td>Jul’23</td>
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</tr>
<tr>
<td>Aug’23</td>
<td>Inflation rate drops sharply to 6.8% in July</td>
</tr>
<tr>
<td>Sep’23</td>
<td>Inflation rate drops sharply to 6.8% in July</td>
</tr>
</tbody>
</table>

Question: Q7b: And now regarding the ‘cost of living crisis’ in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. September 2023 = 1,756
Due to the cost-of-living crisis, most of UK adults (64%) are either ‘cautious and being very careful’ (46%) or have been ‘hit hard and are cutting back’ (18%)

Figure 2. Feelings about situation during the ‘cost of living crisis’, Percentage, UK

- I’m one of the lucky ones – better off than before the crisis
- I’m alright – the ‘cost of living crisis’ has not really affected me and confident it won’t
- I’m cautious - things are OK but I feel I have to be very careful
- I’ve been hit hard – no option but to cut back on spending
- Although I’ve been hit hard and should cut back, I’ll spend today and let tomorrow look after itself

Question: Q17: There has been a lot of talk about how the ‘cost of living crisis’ has affected people’s financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. September 2023 = 1,756.
2. Trip Intentions: UK and Overseas
Overnight domestic trip intentions are above the levels anticipated back in September 2022, 76% planning a trip in the next 12 months compared to 67% a year earlier.

Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, September 2023, UK

Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. September 2022 = 1,758, September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
For overnight overseas trips, intentions are also above 2022 levels, 62% planning an overseas trip in the next 12 months compared to 51% the year before

Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, September 2023, UK

Question: QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. September 2022 = 1,758, September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Long term domestic overnight trip intentions have remained relatively stable since April this year, while overseas intentions jumped to 62% in September.

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, September 2023, UK

UK overnight trip
Overseas overnight trip

Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
At a ‘net level’, the number of intended domestic trips by UK adults is above those taken in the last 12 months and have increased – overseas intentions are still below.

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to last 12 months, Percentage, September 2023, UK

- Will take more: June 2023 = 25, July 2023 = 26, August 2023 = 28, September 2023 = 25
- Will take about the same: June 2023 = 39, July 2023 = 36, August 2023 = 36, September 2023 = 40
- Will take fewer: June 2023 = 21, July 2023 = 23, August 2023 = 22, September 2023 = 21
- Don’t know/not sure yet: June 2023 = 15, July 2023 = 14, August 2023 = 16, September 2023 = 14
- Net (‘more’ minus ‘fewer’): June 2023 = 15, July 2023 = 15, August 2023 = 14, September 2023 = 14

Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, September 2023, UK

- Will take more: June 2023 = 15, July 2023 = 14, August 2023 = 16, September 2023 = 15
- Will take about the same: June 2023 = 31, July 2023 = 29, August 2023 = 29, September 2023 = 32
- Will take fewer: June 2023 = 33, July 2023 = 34, August 2023 = 36, September 2023 = 35
- Don’t know/not sure yet: June 2023 = 21, July 2023 = 22, August 2023 = 19, September 2023 = 18
- Net (‘more’ minus ‘fewer’): June 2023 = June 2023, July 2023 = 15, August 2023 = 15, September 2023 = 15

Question: VB1a. Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks than you took in the last 12 months? Base: All respondents. September 2023 = 1,756.
36% of respondents indicated they are more likely to choose a trip in the UK than overseas, compared to the last 12 months—the top reason being ‘UK holidays are cheaper’ (51%).

Figure 9. Difference in short break/holiday choices in the next 6 months compared to last 12 months, Percentage, September 2023, UK

- More likely to choose UK than overseas
- More likely to choose overseas than UK
- Broadly the same as past 12 months
- Don’t know/It depends on the situation

<table>
<thead>
<tr>
<th></th>
<th>36</th>
<th>27</th>
<th>23</th>
<th>14</th>
</tr>
</thead>
</table>

TOP 5 reasons for UK preference
1. UK holidays are cheaper (51%)
2. Shorter / quicker travel (48%)
3. UK holidays are easier to plan (47%)
4. To avoid long queues at airports/cancelled flights (39%)
5. I want to take holidays in places I am familiar with (24%)

TOP 5 reasons for Overseas preference
1. Better weather (48%)
2. I want to visit new places/experience new cultures (40%)
3. Overseas holidays are cheaper (31%)
4. I’m prioritising overseas trips after missing out in the last few years (25%)
5. To visit friends and relatives (16%)

FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.

Question: VB2j. Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months? Base: All respondents. September 2023 = 1,756. VB2k. Why are you more likely to choose a UK trip than an overseas trip? September 2023 = 637. VB2l. Why are you more likely to choose an overseas trip than a UK trip? September 2023 = 454
The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ (36%), followed by ‘personal finances’ (26%) and ‘UK weather’ (25%).

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, September 2023, UK

<table>
<thead>
<tr>
<th>Barriers</th>
<th>June 2023 data</th>
<th>July 2023 data</th>
<th>August 2023 data</th>
<th>September 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising cost of living</td>
<td>57%</td>
<td>60%</td>
<td>60%</td>
<td>57%</td>
</tr>
<tr>
<td>Personal finances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK weather</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rising costs of holidays/leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My general health</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The cost of fuel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited available annual leave</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I wouldn’t take a UK short break or holiday in the next six months regardless of the circumstances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prioritising overseas travel after missing out during the pandemic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None/ No barriers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FOR THE FULL LIST OF BARRIERS, PLEASE SEE THE PUBLISHED TABLES.

Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?

Base: All asked each question. September 2023 = 1,756. *NET: Cost and finances includes ‘rising cost of living’, ‘personal finances’, ‘the cost of fuel’, ‘rising costs of holidays/leisure’ and ‘difficulty getting money back if a trip is cancelled’
The ‘rising cost of living’ is the biggest financial barrier to taking an overnight domestic trip, and this has been consistent the last 4 months

Figure 10b. Perceived financial barriers to an overnight trip in the UK in next 6 months, Wave-on-wave, Percentage, UK

Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?

Base: All asked each question. September 2023 = 1,756.

Figure 10b shows the percentage of people perceiving rising cost of living, rising costs of holidays/leisure, and personal finances as barriers to an overnight trip in the UK over the past six months.
Focusing on barriers related directly to the cost of a domestic overnight trip, the ‘cost of accommodation’ remains at the top, followed by ‘cost of drinking/eating out’, albeit this has dropped.

Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Wave-on-wave, Percentage, UK

Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: September 2023 = 1,756.
UK adults plan to cut their **overnight trip spending** mainly on accommodation, eating out and activities. **29%** will cut the number of trips.

Figure 13a. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, September 2023, UK, Full list

<table>
<thead>
<tr>
<th>Action</th>
<th>September 2023 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose cheaper accommodation</td>
<td>29</td>
</tr>
<tr>
<td>Spend less on eating out</td>
<td>27</td>
</tr>
<tr>
<td>Look for more ‘free things’ to do</td>
<td>24</td>
</tr>
<tr>
<td>Cut back on buying gifts/shopping at the destination</td>
<td>20</td>
</tr>
<tr>
<td>Travel when it’s cheaper (i.e. outside of busier time periods)</td>
<td>16</td>
</tr>
<tr>
<td>Choose self-catering accommodation</td>
<td>16</td>
</tr>
<tr>
<td>Take fewer UK short breaks/holidays</td>
<td>15</td>
</tr>
<tr>
<td>Do fewer activities</td>
<td>14</td>
</tr>
<tr>
<td>Visit fewer visitor attractions</td>
<td>14</td>
</tr>
<tr>
<td>Take shorter UK short breaks/holidays</td>
<td>13</td>
</tr>
<tr>
<td>Take a holiday in the UK instead of overseas</td>
<td>12</td>
</tr>
<tr>
<td>Stay with friends or relatives</td>
<td>11</td>
</tr>
<tr>
<td>Travel less at the destination</td>
<td>11</td>
</tr>
<tr>
<td>Take UK short breaks/holidays closer to home</td>
<td>10</td>
</tr>
<tr>
<td>Take day trips instead of UK short breaks/holidays</td>
<td>9</td>
</tr>
<tr>
<td>Not go on UK short breaks/holidays</td>
<td>8</td>
</tr>
<tr>
<td>The cost of living crisis isn’t likely to influence my UK short breaks/holidays at all</td>
<td>25</td>
</tr>
</tbody>
</table>

**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:** September 2023 = 1,756.

<table>
<thead>
<tr>
<th>Reduce the number of UK overnight trips</th>
<th>NET ‘fewer’, ‘not go’, ‘go day trips instead’</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2023 data</td>
<td>29%</td>
</tr>
<tr>
<td>July 2023 data</td>
<td>33%</td>
</tr>
<tr>
<td>Aug 2023 data</td>
<td>31%</td>
</tr>
<tr>
<td>Sept 2023 data</td>
<td>29%</td>
</tr>
</tbody>
</table>
In terms of UK day trips, 25% of UK adults intend to look for more free things to do. 32% will reduce the number of day trips – slightly below previous waves.

Figure 13b. ‘Cost of living’ impact on day trips, Percentage, September 2023, UK, Full list

- Look for more ‘free things’ to do on day trips: 25%
- Spend less on eating out on day trips: 24%
- Take fewer day trips: 23%
- Travel when it’s cheaper (i.e. outside of busier time periods): 21%
- Cut back on buying gifts/shopping on day trips: 21%
- Take day trips closer to home: 19%
- Visit fewer visitor attractions on day trips: 18%
- Do fewer activities on day trips: 17%
- Not go on day trips: 10%

The cost of living crisis isn’t likely to influence my day trips at all: 29%

Question: VB7Cii. How, if at all, would you say the ‘cost of living crisis’ is likely to influence your day trips in the next few months?
Base: September 2023 = 1,756.

<table>
<thead>
<tr>
<th>Reduce the number of day trips</th>
<th>June 2023 data</th>
<th>July 2023 data</th>
<th>Aug 2023 data</th>
<th>Sept 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ‘fewer’, ‘not go on day trips’</td>
<td>33%</td>
<td>34%</td>
<td>34%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Over the next 12 months, UK adults are more likely to visit outdoor areas and practice leisure or sports activities, and are less likely to attend entertainment activities and wellbeing activities.

Figure 14. Leisure venues and activities more or less likely to visit/do compared to last 12 months, Net: ‘more likely’ minus ‘Less likely’, Percentage, UK, September 2023

Question: VB9ai. Thinking about your personal finances, which, if any, of these types of places in the UK are you more likely to visit in the next 12 months, compared to the last 12 months? VB9bi. Still thinking about your personal finances, which, if any, are you less likely to visit in the next 12 months compared to the last 12 months? VB10ai. Again thinking about your personal finances, which, if any, of these types of activities are you more likely to do in the next 12 months, compared to the last 12 months? VB10bi. And which, if any, are you less likely to do in the next 12 months compared to the last 12 months?

Base: September 2023 = 1,756.
3. The Next Trip: Overnight and Day Trips
45% of UK adults have already booked their domestic trips for October, while 67% have already booked their overseas trips for that month.

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, September 2023, UK

Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: October 2023 n = 250, November 2023 n = 123, December 2023 n = 138, January 2024 n = 79. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: October 2023 n = 123, November 2023 n = 90, December 2023 n = 91, January 2024 n = 64.
Short breaks are likely between October 2023 and January 2024, this is more likely than was reported in 2022

Figure 17. Length of next UK holiday or short break by time period, Percentage, September 2023, UK

Question: QVB3. Is this next trip to <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All September 2023 respondents intending to take next holiday or short break in each time period: UK trip 2023-2024: October 2023 n = 250, November 2023 n = 123, December 2023 n = 138, January 2024 n = 79
As in 2022, the South West is the most preferred UK overnight destination in October-December, while London leads for January-March 2024.

Figure 18. Where planning on staying on next UK overnight trip in October to December 2023, Percentage, August 2023 and September 2023, UK

Figure 19. Where planning on staying on next UK overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK

Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?

Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.
The top type of destination for overnight trips in both October-December 2023 and January-March 2024 is ‘City or large town’

**Figure 20. Types of destination for trip in October to December 2023, Percentage, August 2023 and September 2023, UK**

- August 2023/September 2023 data
- August 2022/September 2022 data

**Figure 21. Types of destination for overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK**

- August 2023/September 2023 data
- August 2022/September 2022 data

Question: VB5. Which of the following best describes the main types of destinations you are likely to stay in during your next UK holiday or short break in [INSERT DESTINATION FROM VB4A] in [INSERT MONTH FROM VB2A]?

Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.
For both time periods, own car is the most common mode of travel, followed by train.

**Figure 22. Top 5 main modes of travel to destination for trip in October to December 2023. Percentage, August 2023 and September 2023, UK**

<table>
<thead>
<tr>
<th>Mode</th>
<th>August 2023/September 2023 data</th>
<th>August 2022/September 2022 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>Train</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Plane</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Car - hired/rented/taxi</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Private coach/bus</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Figure 23. Top 5 main modes of travel to destination for overnight trip in January to March 2024. Percentage, August 2023 and September 2023, UK**

<table>
<thead>
<tr>
<th>Mode</th>
<th>August 2023/September 2023 data</th>
<th>August 2022/September 2022 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>44%</td>
<td>39%</td>
</tr>
<tr>
<td>Train</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Plane</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Public bus/coach</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Private coach/bus</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

FOR THE FULL LIST OF MODES OF TRANSPORT, PLEASE SEE THE PUBLISHED TABLES.

Question: VB4c. What do you anticipate being the main mode of travel to your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2a>? Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.
For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type, followed by a ‘friends or relatives’ home’ in October – December, while ‘Guest house / B&B’ is the second preference for January to March.
‘Partner’ is the most common companion on a trip during both time periods, followed by ‘child, grandchild or young adult’

Figure 26. Visitor party make-up for trip in October to December 2023, Percentage, August 2023 and September 2023, UK

- Partner: 54%
- Child, grandchild, or young adults with parents: 33%
- Friends: 18%
- Other members of family: 15%
- Pets: 6%
- Your parents (of adults aged 25+ only): 9%
- Intend to travel on my own: 6%
- Other: 8%

July 2023/August 2023 data: 54%
July 2022/August 2022 data: 53%

Figure 27. Visitor party make-up for trips taken from trip in in January to March 2024, Percentage, August 2023 and September 2023, UK

- Partner: 43%
- Child, grandchild, or young adults with parents: 32%
- Friends: 26%
- Other members of family: 20%
- Pets: 12%
- Your parents (of adults aged 25+ only): 11%
- Intend to travel on my own: 10%
- Other: 6%

July 2023/August 2023 data: 42%
July 2022/August 2022 data: 43%

Question: QVB4d. With whom are you likely to spend your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2a>?
Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.
The top motivation for overnight trips both in October-December and January to March 2024 is ‘family time or time with my partner’, followed by ‘to get away from it all and have a rest’.
In both October-December 2023 and January-March 2024, the top activity will be ‘trying local food and drink’

Figure 30. Activities for UK holidays and short breaks, in October -December 2023, Percentage, September 2023, UK, Full list

- Trying local food and drink: 38%
- Walking, Hiking or Rambling: 33%
- Visit heritage sites (e.g. castles, historic sites): 22%
- Visit cultural attractions (e.g. museums, galleries): 20%
- Explore scenic areas by car: 19%
- Visit family attractions: 18%
- Learn about local history and culture: 16%
- Nature and wildlife experiences (e.g. bird watching, wildlife tours): 16%
- Experience the nightlife (e.g. pubs, bars, clubs): 15%
- Speciality shopping (e.g. for something unique): 12%
- Health or wellbeing experiences (e.g. spa treatments, yoga): 11%
- Adventure activities: 10%
- Water sports (e.g. swimming, surfing): 9%
- Visit locations featured in TV, film or literature: 9%
- Cycling or mountain biking: 7%
- Creative or artistic pursuits (e.g. painting, sculpture): 7%
- Conservation or volunteering activities: 4%
- Golf: 3%

Figure 31. Activities for UK holidays and short breaks in January-March 2024, Percentage, September 2023, UK, Full list

- Trying local food and drink: 27%
- Visit heritage sites (e.g. castles, historic sites): 25%
- Visit cultural attractions (e.g. museums, galleries): 24%
- Walking, Hiking or Rambling: 23%
- Visit family attractions: 18%
- Explore scenic areas by car: 18%
- Experience the nightlife (e.g. pubs, bars, clubs): 17%
- Learn about local history and culture: 16%
- Health or wellbeing experiences (e.g. spa treatments, yoga): 13%
- Visit locations featured in TV, film or literature: 12%
- Creative or artistic pursuits (e.g. painting, sculpture): 10%
- Adventure activities: 10%
- Nature and wildlife experiences (e.g. bird watching, wildlife tours): 10%
- Cycling or mountain biking: 8%
- Water sports (e.g. swimming, surfing): 8%
- Speciality shopping (e.g. for something unique): 7%
- Conservation or volunteering activities: 7%
- Golf: 5%

Question: VB6iiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>?

Base: All September respondents planning on taking a holiday or short break in the UK between October to December 2023 n = 511, January to March 2024 n = 224.

Note: Multiple choice question. Totals may exceed 100%.

VisitEngland
4. Past UK and Overseas Trips
More than 3 in 5 (65%) have taken a UK overnight trip between September 2022 and August 2023, while 44% have taken an overseas overnight trip in that time period.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>UK Overnight Trip</th>
<th>Overseas Overnight Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>In September 2022 - August 2023</td>
<td>65</td>
<td>44</td>
</tr>
<tr>
<td>In September 2022</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>In October-December 2022</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>In January - March 2023</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>In April to June 2023</td>
<td>26</td>
<td>14</td>
</tr>
<tr>
<td>In July to August 2023</td>
<td>21</td>
<td>10</td>
</tr>
</tbody>
</table>

Question: VB13a/f. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

VB13a2/g. 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. September 2023 = 1,756.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip.
South West was the most popular destination for domestic trips in the past three months and the main purpose was for holiday/leisure.

**Figure 33. Destination of overnight trips taken in UK in the past three months, Percentage, September 2023, UK**

**Figure 34. Purpose of overnight UK trip taken in the past three months, Percentage, September 2023, UK**

- Holiday/leisure: 75%
- Visiting friends or relatives: 26%
- Business: 3%
- Other: 2%

**Question:** VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH>?  
**Base:** All September 2023 respondents that took an overnight trips in the last three months n= 477  
**Note:** Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose.
5. Overnight Business Trip Intentions (September 2023 data)

Note: * Overnight Business Trip Intentions questions are asked every second month
16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Conference’ is the leading reason (35%), followed by ‘Team building’ (at 33%).

Figure 35. Proportion anticipating an overnight business trip in next 3 months, Percentage, September 2023, UK adults in employment

Figure 36. Reasons for taking an overnight business trip in next 3 months, Percentage, September 2023, UK adults in employment planning a trip

Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? 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). Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.

VB14b: What would be the main reason for this overnight business trip? Base: September 2023 respondents currently in employment n = 1,313. All taking a business trip n=298.
Methodology & Further Data
Methodology

- This report presents findings from the September 2023 wave of the Domestic Sentiment Tracker, with comparisons to previous months where appropriate.
- The survey is conducted online, among a sample of the UK adult population.
- In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

PLEASE NOTE:
- The current 6th phase of this project started in April 2023 and will run until March 2024.
- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis’ impact on trips intentions. It also covers the preference for domestic vs overseas overnight trips.
- Please note that as a result of the questionnaire updates, some questions are not comparable between this 6th phase and the previous phases / waves.
The full data tables are published on the VisitBritain website alongside this report and questions’ data not shown in this report are available to view there: [https://www.visitbritain.org/domestic-sentiment-tracker](https://www.visitbritain.org/domestic-sentiment-tracker)

Extra questions available in the tables are:

- VB1b. Likely to spend more, less or about the same on holidays in the next 12 months, vs last 12 months
- VB9a/b. More/Less likely to visit leisure places in the UK in the next 12 months, vs last 12 months
- VB10a/b. More/Less likely to conduct leisure activities in the UK in the next 12 months, vs last 12 months

To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.