Domestic Sentiment Tracker: February 2024

Published: 21st February 2024
Fieldwork Period: 1st to 7th February 2024

UK Results
1. Current General Sentiment (slides 6-8)
2. Trip Intentions: UK and Overseas (slides 9-20)
3. The Next Trip: Overnight and Day Trips (slides 21-30)
4. Past UK and Overseas Trips (slides 31-34)
5. Overnight Business Trip Intentions* (slides 35-36)
6. Methodology & Further Data (slides 37-39)

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 February 2024.

• 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.

- **February to March 2024 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between February to March 2024
- **April to June 2024 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between April to June 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
- **Retirement age**: Aged 65+
# February 2024: Scorecard of Key Metrics

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>February 2024</th>
<th>Change since January 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of UK adults stating ‘WORST IS STILL TO COME’ regarding the cost of living crisis</td>
<td>45%</td>
<td>+3%</td>
</tr>
<tr>
<td>Proportion intending a UK overnight trip at any point in the next 12 months</td>
<td>81%</td>
<td>+2%</td>
</tr>
<tr>
<td>Proportion intending an overseas overnight trip at any point in the next 12 months</td>
<td>65%</td>
<td>+1%</td>
</tr>
<tr>
<td>Preference for UK over overseas in the next 12 months (vs past 12 months)</td>
<td>32%</td>
<td>-1%</td>
</tr>
<tr>
<td>Took a domestic overnight trip in the past 12 months (February 2023 – January 2024)</td>
<td>65%</td>
<td>=</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>6%</td>
<td>=</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>-13%</td>
<td>-3%*</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>27%</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>+1%</td>
</tr>
<tr>
<td>Top 3 barriers to taking a UK overnight trip in the next 6 months</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Rising cost of living;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd UK weather</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd Personal Finances</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* 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
45% think ‘the worst is still to come’ in relation to the cost-of-living crisis, slightly more than last month but a lot lower than the same point a year ago

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

- The worst is still to come
- Things are going to stay the same
- The worst has passed

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. February 2024 = 1,755
Due to the cost-of-living crisis, most of UK adults (70%) are either ‘cautious and being very careful’ (49%) or have been ‘hit hard and are cutting back’ (21%).

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. February 2024 = 1,755.
2. Trip Intentions: UK and Overseas
**Overnight domestic trip intentions** are above the levels anticipated back in **February 2023**, 81% are planning a trip in the next 12 months compared to 72% a year earlier.

*Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, February 2024, UK*

<table>
<thead>
<tr>
<th>Time Period</th>
<th>February 2023 Data</th>
<th>February 2024 Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>At any point in the next 12 months</td>
<td>81</td>
<td>72</td>
</tr>
<tr>
<td>February to March 2024 trip</td>
<td>18</td>
<td>11</td>
</tr>
<tr>
<td>April to June 2024 trip</td>
<td>41</td>
<td>33</td>
</tr>
<tr>
<td>July to September 2024 trip</td>
<td>50</td>
<td>46</td>
</tr>
<tr>
<td>No plans / would never do this</td>
<td>18</td>
<td>26</td>
</tr>
</tbody>
</table>

**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. February 2023 = 1,757, February 2024 = 1,755. 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 2023 levels, 65% are 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, February 2024, UK

<table>
<thead>
<tr>
<th></th>
<th>February 2024 data</th>
<th>February 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>At any point in the next 12 months</td>
<td>65</td>
<td>51</td>
</tr>
<tr>
<td>February to March 2024 trip</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>April to June 2024 trip</td>
<td>25</td>
<td>19</td>
</tr>
<tr>
<td>July to September 2024 trip</td>
<td>36</td>
<td>30</td>
</tr>
<tr>
<td>No plans / would never do this</td>
<td>31</td>
<td>45</td>
</tr>
</tbody>
</table>

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. February 2023= 1,757, February 2024 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Both long term domestic and overseas overnight trip intentions have improved significantly since last summer, and are now at their highest levels since we began tracking.

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, February 2024, UK

UK overnight trip vs 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 February 2024 = 1,755. 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 – overseas intentions remain below

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to last 12 months, Percentage, February 2024, UK

- Will take more: 24%, 25%, 25%, 26%
- Will take about the same: 45%, 40%, 41%, 42%
- Will take fewer: 16%, 21%, 19%, 20%
- Don’t know/not sure yet: 14%, 14%, 16%, 12%
- Net (‘more’ minus ‘fewer’): 6% increase, 3% increase, 6% increase, 6% increase

November 2023 data: 18%, December 2023 data: 15%, January 2024 data: 18%, February 2024 data: 19%

Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, February 2024, UK

- Will take more: 19%, 18%, 18%, 17%
- Will take about the same: 37%, 33%, 32%, 35%
- Will take fewer: 25%, 30%, 28%, 30%
- Don’t know/not sure yet: 19%, 19%, 22%, 19%
- Net (‘more’ minus ‘fewer’): 6% increase, 3% increase, 6% increase, 6% increase

November 2023 data: 6%, December 2023 data: 12%, January 2024 data: 16%, February 2024 data: 19%

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. February 2024 = 1,755.
32% 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 easier to plan’ (55%)

Figure 9. Difference in short break/holiday choices in the next 6 months compared to last 12 months, Percentage, February 2024, 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>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely UK</td>
<td>32</td>
</tr>
<tr>
<td>More likely Overseas</td>
<td>26</td>
</tr>
<tr>
<td>Broadly the same</td>
<td>26</td>
</tr>
<tr>
<td>Don’t know</td>
<td>16</td>
</tr>
</tbody>
</table>

TOP 5 reasons for UK preference
1. UK holidays are easier to plan (55%)
2. UK holidays are cheaper (51%)
3. Shorter / quicker travel (45%)
4. To avoid long queues at airports/cancelled flights (36%)
5. I want to take holidays in places I am familiar with (24%)

TOP 5 reasons for Overseas preference
1. Better weather (53%)
2. I want to visit new places/experience new cultures (40%)
3. Overseas holidays are cheaper (29%)
4. I’m prioritising overseas trips after missing out in the last few years (20%)
5. To visit friends or relatives (18%)

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. February 2024 = 580. VB2k. Why are you more likely to choose a UK trip than an overseas trip? February 2024 = 454 VB2l. Why are you more likely to choose an overseas trip than a UK trip? February 2024 = 1,755.
The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ (37%), followed by ‘UK weather’ (31%) and ‘personal finances’ (28%).

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, February 2024, UK

- Rising cost of living: 37%
- UK weather: 31%
- Personal finances: 28%
- Rising costs of holidays/leisure: 25%
- My general health: 16%
- The cost of fuel: 15%
- Limited available annual leave: 12%
- Prioritising overseas travel after missing out during the pandemic: 6%
- Difficulty getting money back if a trip is cancelled: 6%
- None/ No barriers: 16%

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. February 2024 = 1,755. *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, followed by ‘personal finances’.

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

Rising cost of living  Rising costs of holidays/leisure  Personal finances

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. February 2024 = 1,755.
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’.

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: February 2024 = 1,755.
UK adults plan to cut their overnight trip spending mainly on accommodation, eating out and activities. 27% will cut the number of overnight trips they take.

**Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, February 2024, UK, Full list**

<table>
<thead>
<tr>
<th>Spend less on eating out</th>
<th>28%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose cheaper accommodation</td>
<td>28%</td>
</tr>
<tr>
<td>Look for more ‘free things’ to do</td>
<td>26%</td>
</tr>
<tr>
<td>Cut back on buying gifts/shopping at the destination</td>
<td>18%</td>
</tr>
<tr>
<td>Travel when it’s cheaper</td>
<td>17%</td>
</tr>
<tr>
<td>Take fewer UK short breaks/holidays</td>
<td>16%</td>
</tr>
<tr>
<td>Choose self-catering accommodation</td>
<td>14%</td>
</tr>
<tr>
<td>Do fewer activities</td>
<td>14%</td>
</tr>
<tr>
<td>Visit fewer visitor attractions</td>
<td>13%</td>
</tr>
<tr>
<td>Take shorter UK short breaks/holidays</td>
<td>12%</td>
</tr>
<tr>
<td>Stay with friends or relatives</td>
<td>12%</td>
</tr>
<tr>
<td>Take a holiday in the UK instead of overseas</td>
<td>11%</td>
</tr>
<tr>
<td>Take day trips instead of UK short breaks/holidays</td>
<td>8%</td>
</tr>
<tr>
<td>Take UK short breaks/holidays closer to home</td>
<td>8%</td>
</tr>
<tr>
<td>Travel less at the destination</td>
<td>8%</td>
</tr>
<tr>
<td>Not go on UK short breaks/holidays</td>
<td>6%</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>

**Reduce the number of UK overnight trips**

<table>
<thead>
<tr>
<th>Nov 2023 data</th>
<th>Dec 2023 data</th>
<th>Jan 2024 data</th>
<th>Feb 2024 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ‘fewer’, ‘not go’, ‘go day trips instead’</td>
<td>27%</td>
<td>27%</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: February 2024 = 1,755.
In terms of **UK day trips**, 26% of UK adults intend to look for more free things to do. 32% will reduce the number of day trips – in line with previous waves

Figure 13b. ‘Cost of living’ impact on day trips, Percentage, February 2024, UK, Full list

<table>
<thead>
<tr>
<th>Action</th>
<th>February 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Look for more ‘free things’ to do on day trips</td>
<td>26%</td>
</tr>
<tr>
<td>Spend less on eating out on day trips</td>
<td>25%</td>
</tr>
<tr>
<td>Will take fewer day trips</td>
<td>24%</td>
</tr>
<tr>
<td>Cut back on buying gifts/shopping on day trips</td>
<td>21%</td>
</tr>
<tr>
<td>Travel when it’s cheaper</td>
<td>18%</td>
</tr>
<tr>
<td>Take day trips closer to home</td>
<td>17%</td>
</tr>
<tr>
<td>Do fewer activities on day trips</td>
<td>15%</td>
</tr>
<tr>
<td>Visit fewer visitor attractions on day trips</td>
<td>15%</td>
</tr>
<tr>
<td>Will not go on day trips</td>
<td>9%</td>
</tr>
<tr>
<td>The cost of living crisis isn’t likely to influence my day trips at all</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Reduce the number of day trips**

<table>
<thead>
<tr>
<th></th>
<th>Nov 2023 data</th>
<th>Dec 2023 data</th>
<th>Jan 2024 data</th>
<th>Feb 2024 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ‘fewer’, ‘not go on day trips’</td>
<td>33%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
</tr>
</tbody>
</table>

**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:** February 2024 = 1,755.
In the next 12 months, UK adults are more likely to visit outdoor areas, practice leisure/sports activities or visit attractions. They are less likely to take part in 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, February 2024

Outdoor Areas (Mountain or hills, Beach or coastal walk/trail) 31
Leisure or sports activities (walking, cycling, swimming, etc.) 18
Visitor Attractions (museums, art galleries, indoor activities, etc.) 4
Entertainment and events (restaurants, cinemas, festivals, etc.) -2
Wellbeing Activities (spa/beauty/wellness retreats, etc.) -14

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: February 2024 = 1,755.
3. The Next Trip: Overnight and Day Trips
54% of UK adults have already booked their domestic trips for March, while 74% have already booked their overseas trips for the same month.

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, February 2024, 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)>? Base: UK trip: March 2024 n = 197, April 2024 n = 205, May 2024 n = 186, June 2024 n = 181. 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: March 2024 n = 94, April 2024 n = 104, May 2024 n = 123, June 2024 n = 150.
Short breaks are more likely between March and May 2024, while longer breaks are preferred in June – this is relatively in line with a year ago except for May 2023.

Figure 17. Length of next UK holiday or short break by time period, Percentage, February 2024, 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 February 2024 respondents intending to take next holiday or short break in each time period: UK trip 2023-2024: March 2024 n = 197, April 2024 n = 205, May 2024 n = 186, June 2024 n = 181; March 2023 n = 93, April 2023 n = 159, May 2023 n=166, June 2023 n=159.
The South West is the most preferred UK overnight destination for both February-March 2024 and April-June 2024 trips

Figure 18. Where planning on staying on next UK overnight trip in February to March 2024, Percentage, January 2024 and February 2024, UK

- January / February 2024 data
- January / February 2023 data

Figure 19. Where planning on staying on next UK overnight trip in April to June 2024, Percentage, January 2024 and February 2024, UK

- January / February 2024 data
- January / February 2023 data

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

Base: All January 2024 and February 2024 respondents planning on taking a holiday or short break in the UK February to March 2023 n = 404, April to June 2023 n = 988, February to March 2024 n = 606, April to June 2024 n = 1,127. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.
The top destination type for overnight trips for February-March 2024 is ‘City or large town’, while it is ‘Countryside or village’ for the April-June 2024 period.

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 January 2024 and February 2024 respondents planning on taking a holiday or short break in the UK in the UK February to March 2023 n = 404, April to June 2023 n = 988; February to March 2024 n = 606, April to June 2024 n = 1,127.
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 February to March 2024, Percentage, January 2024 and February 2024, UK

- January / February 2024 data
- January / February 2023 data

55 55
5 20 22
7 3
4 3
3
Own Car Train Plane Car - hired/rented/taxi Private coach/bus

59 55
20 22
7 5
4 3
3
Own Car Train Plane Car - hired/rented/taxi Private coach/bus

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 January 2024 and February 2024 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n = 988; February to March 2024 n = 606, April to June 2024 n = 1,127.
For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type

Figure 24. Top 10 accommodation types planning on staying in on next UK overnight trip in February to March 2024, Percentage, January 2024 and February 2024, UK

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>January 2024</th>
<th>February 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / Motel / Inn</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>Friends or relatives’ home</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Guest house / Bed and breakfast</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Stayed in a rented house/cottage/lodge or similar</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Serviced apartment</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Campervan / Motorhome</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Staying in a rented flat/apartment or similar</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Static caravan - not owned by you</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>In someone else’s home on a commercial basis – rental of full property</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Your second home / Timeshare</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Figure 25. Top 10 accommodation types planning on staying in on next UK overnight trip in April to June 2024, Percentage, January 2024 and February 2024, UK

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>January 2024</th>
<th>February 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / Motel / Inn</td>
<td>41%</td>
<td>36%</td>
</tr>
<tr>
<td>Stayed in a rented house/cottage/lodge or similar</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Guest house / Bed and breakfast</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Friends or relatives’ home</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Static caravan - not owned by you</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Staying in a rented flat/apartment or similar</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>In someone else’s home on a commercial basis – rental of full property</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Serviced apartment</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>In someone else’s home on a commercial basis – rental of room only</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Static caravan - owned by you</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

FOR THE FULL LIST OF ACCOMMODATION TYPES, PLEASE SEE THE PUBLISHED TABLES.

Question: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All January 2024 and February 2024 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2024 n = 606, April to June 2024 n = 1,127.
‘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 February to March 2024, Percentage, January 2024 and February 2024, UK

- **Partner**: 63%
- **Child, grandchild or young adults with parents**: 29%
- **Friends**: 19%
- **Other members of your family**: 15%
- **Pets**: 10%
- **Your parents (of adults aged 25+ only)**: 6%
- **Other**: 2%

### Figure 27. Visitor party make-up for trip in April to June 2024, Percentage, January 2024 and February 2024, UK

- **Partner**: 60%
- **Child, grandchild or young adults with parents**: 30%
- **Friends**: 32%
- **Other members of your family**: 15%
- **Pets**: 15%
- **Your parents (of adults aged 25+ only)**: 8%
- **Other**: 4%

Question: QVB4d. With whom are you likely to spend your next UK holiday or short break in [DESTINATION] in [MONTH]? Base: All January 2024 and February 2024 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n = 988; February to March 2024 n = 606, April to June 2024 n = 1,127.
Family connection time continues to be the most important trip motivator, as well as escapism and rest. For spring trips, connecting with nature / the outdoors is key for a quarter.

Figure 28. Motivations for UK holidays and short breaks in February to March 2024, Percentage, February 2024, UK, Full list

- Family time or time with my partner: 51%
- To get away from it all and have a rest: 31%
- To celebrate a special occasion, such as…: 20%
- To spend time with friends: 19%
- To connect with nature / be outdoors: 18%
- To experience excitement or fun: 15%
- To travel somewhere new: 15%
- For an active holiday, with exercise or sport: 11%
- Because of a particular interest: 10%
- To go somewhere where there was great food: 9%
- For adventure or a challenge: 7%
- To go somewhere luxurious where I could…: 5%
- To learn something new: 5%
- For a technology detox: 4%

Figure 29. Motivations for UK holidays and short breaks in April to June 2024, Percentage, February 2024, UK, Full list

- Family time or time with my partner: 41%
- To get away from it all and have a rest: 38%
- To connect with nature / be outdoors: 24%
- To travel somewhere new: 19%
- To experience excitement or fun: 19%
- To spend time with friends: 16%
- To celebrate a special occasion, such as…: 12%
- For adventure or a challenge: 12%
- For an active holiday, with exercise or sport: 10%
- Because of a particular interest: 9%
- To go somewhere where there was great food: 8%
- To learn something new: 7%
- To go somewhere luxurious where I could…: 6%
- For a technology detox: 3%

Question: Which of the following best describe your motivation/s for this trip?
Base: All February 2024 respondents planning on taking a holiday or short break in the UK between February to March 2024 n = 307, April to June 2024 n = 572.
Note: Multiple choice question. Totals may exceed 100%.
‘Trying local food and drink’, followed by ‘Walking, hiking or rambling’ are the top activities planned for trips this winter and spring.

Figure 30. Activities for UK holidays and short breaks, in February-March 2024, Percentage, February 2024, UK, Full list

- Trying local food and drink: 43%
- Walking, Hiking or Rambling: 35%
- Visit heritage sites: 31%
- Visit cultural attractions: 28%
- Explore scenic areas by car: 23%
- Visit family attractions: 21%
- Experience the nightlife: 18%
- Nature and wildlife experiences: 16%
- Learn about local history and culture: 16%
- Speciality shopping: 10%
- Adventure activities: 9%
- Health or wellbeing experiences: 8%
- Visit locations featured in TV, film or…: 8%
- Creative or artistic pursuits: 7%
- Cycling or mountain biking: 6%
- Water sports: 5%
- Golf: 2%
- Conservation or volunteering activities: 2%

Figure 31. Activities for UK holidays and short breaks in April-June 2024, Percentage, February 2024, UK, Full list

- Trying local food and drink: 44%
- Walking, Hiking or Rambling: 36%
- Visit cultural attractions: 28%
- Visit heritage sites: 27%
- Explore scenic areas by car: 26%
- Learn about local history and culture: 23%
- Nature and wildlife experiences: 21%
- Visit family attractions: 18%
- Speciality shopping: 15%
- Experience the nightlife: 12%
- Adventure activities: 11%
- Health or wellbeing experiences: 11%
- Water sports: 10%
- Visit locations featured in TV, film or…: 8%
- Creative or artistic pursuits: 7%
- Cycling or mountain biking: 6%
- Golf: 3%
- Conservation or volunteering activities: 2%

Question: VB6fiii. 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 February 2024 respondents planning on taking a holiday or short break in the UK between February to March 2024 n = 307, April to June 2024 n = 572.

Note: Multiple choice question. Totals may exceed 100%.
4. Past UK and Overseas Trips
Almost two thirds (65%) have taken a UK overnight trip between February 2023 and January 2024, while 46% have taken an overseas overnight trip during the same time period.

Figure 32. Proportion UK adult population who have taken an overnight UK or overseas trip in below time period, Percentage, February 2024, UK

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 February 2024 = 1,755.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip.
18% of respondents went on a domestic overnight trip between November 2023 and January 2024, compared to 24% who had previously intended to do so.

Figure 32b. Incidence of UK short breaks or holidays intended within next 3 months and taken in last 3 months of UK adult population, Percentage, February 2024, UK.
London, the South West and the North West were 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, February 2024, UK

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>20</td>
</tr>
<tr>
<td>South West</td>
<td>15</td>
</tr>
<tr>
<td>North West</td>
<td>14</td>
</tr>
<tr>
<td>Scotland</td>
<td>10</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>10</td>
</tr>
<tr>
<td>South East</td>
<td>7</td>
</tr>
<tr>
<td>East of England</td>
<td>6</td>
</tr>
<tr>
<td>East Midlands</td>
<td>6</td>
</tr>
<tr>
<td>Wales</td>
<td>5</td>
</tr>
<tr>
<td>West Midlands</td>
<td>5</td>
</tr>
<tr>
<td>North East</td>
<td>4</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

Figure 34. Purpose of overnight UK trip taken in the past three months, Percentage, February 2024, UK

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday/leisure</td>
<td>69</td>
</tr>
<tr>
<td>Visiting friends or relatives</td>
<td>36</td>
</tr>
<tr>
<td>Business</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

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 February 2024 respondents that took an overnight trip in the last three months n= 302
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 (January 2024 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 (34%), followed by ‘Meeting’ and ‘Team Building’ (26%).

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: January 2024 respondents currently in employment n = 1,337. All taking a business trip n=287.
Methodology & Further Data
Methodology

– This report presents findings from the February 2024 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 because 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

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.