

Domestic Sentiment Tracker: March 2024

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Fieldwork Period: 1st to 7th March 2024

UK Results

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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 March 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.

- **April to June 2024 Intenders** : Residents of the UK who claim their next domestic overnight trip will take place between April to June 2024
- **July to September 2024 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between July to September 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+

March 2024: Scorecard of Key Metrics

Key Metrics	March 2024	Change since February 2024
% of UK adults stating 'WORST IS STILL TO COME' regarding the cost of living crisis	41%	-4%*
Proportion intending a UK overnight trip at any point <u>in the next 12 months</u>	76%	-5%*
Proportion intending an overseas overnight trip at any point <u>in the next 12 months</u>	57%	-8%*
Preference for UK over overseas in the next 12 months (vs past 12 months)	35%	+3%
Took a domestic overnight trip in the past 12 months (March 2023 – February 2024)	60%	-5%*
Net proportion of UK trips in the next 12 months vs the last 12 months [% 'more' minus % 'fewer' trips]	-5	-11%*
Net proportion of overseas trips in the next 12 months vs the last 12 months [% 'more' minus % 'fewer' trips]	-22%	-9%*
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	28%	+1%
Reduce the number of day trips due to cost of living crisis [NET 'fewer', 'not go on day trips']	31%	-1%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1 st Rising cost of living; 2 nd UK weather 3 rd Personal Finances	None

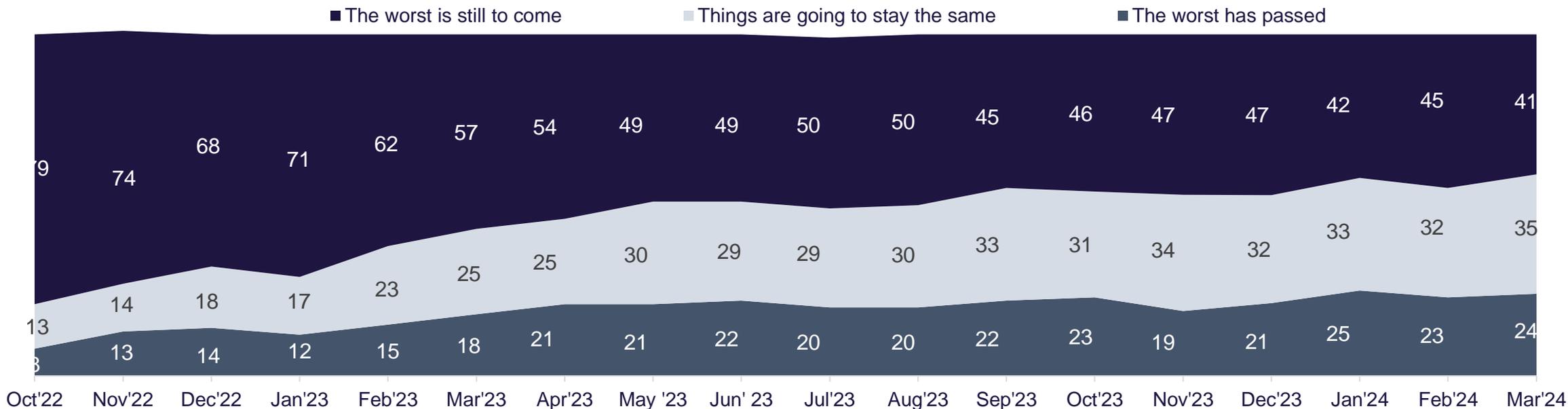
* Represents a statistically significant change on previous wave
 N/A – due to new question wording meaning comparison to last wave cannot be done



1. Current General Sentiment

41% think 'the worst is still to come' in relation to the cost-of-living crisis, a significant improvement on last month and the lowest figure since we began tracking

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



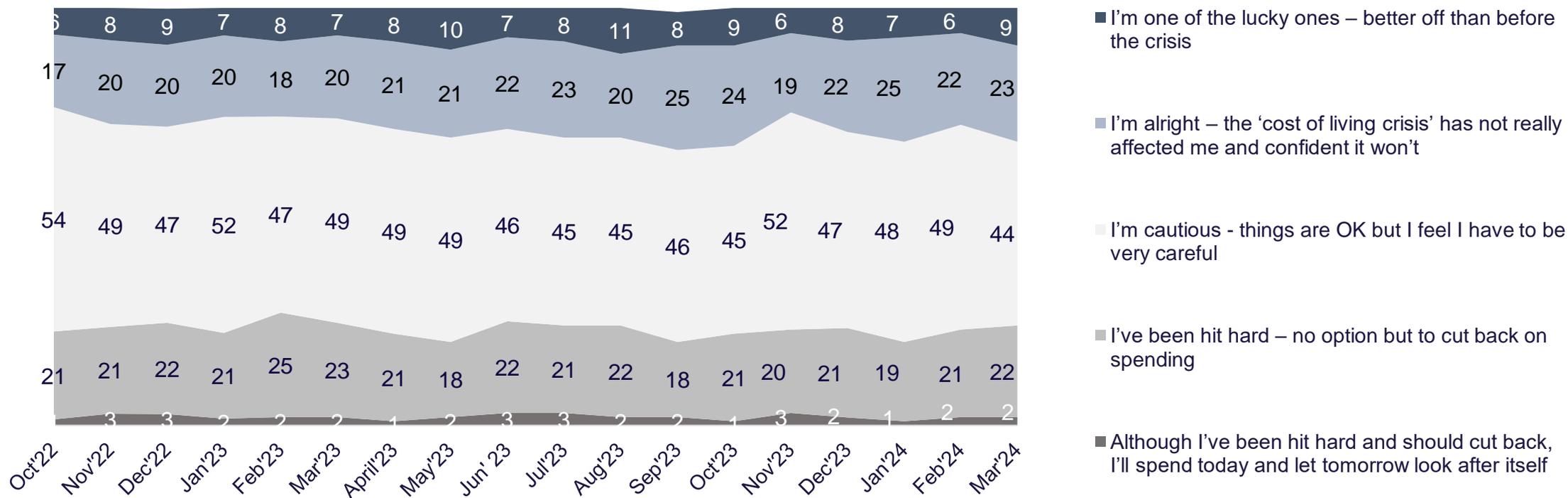
(in %)	Oct'22	Nov'22	Dec'22	Jan'23	Feb' 23	Mar'23	Apr'23	May'23	Jun' 23	Jul'23	Aug'23	Sep'23	Oct'23	Nov'23	Dec'23	Jan'24	Feb'24	Mar'24
CPI 12-month rate	11.1	10.7	10.5	10.1	10.4	10.1	8.7	8.7	7.9	6.8	6.7	6.7	4.6	3.9	4.0	4.0	n/a	n/a
BOE Bank rate	2.25	3.00	3.50	3.50	4.00	4.25	4.25	4.50	5.00	5.00	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25

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. March 2024 = 1,775. Monthly CPI data from the Office of National Statistics (ONS), latest available January 2024. Bank Rate historical data from BOE Database.



Due to the cost-of-living crisis, most UK adults (66%) are either 'cautious and being very careful' (44%) or have been 'hit hard and are cutting back' (22%)

Figure 2. Feelings about situation during the 'cost of living crisis', Percentage wave-on-wave, UK



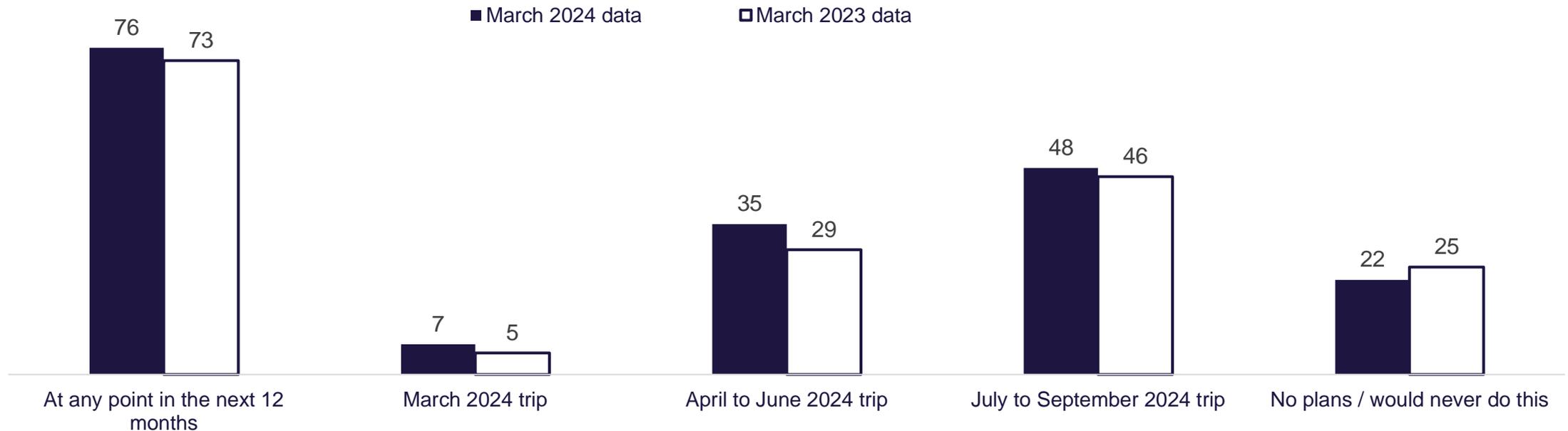
Question: Q17: There has been a lot of talk about how the 'cost of living crisis has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. Mar 2024 = 1,775.



2. Trip Intentions: UK and Overseas

Overnight domestic trip intentions are above the levels anticipated back in March 2023, 76% are planning a trip in the next 12 months compared to 73% a year earlier

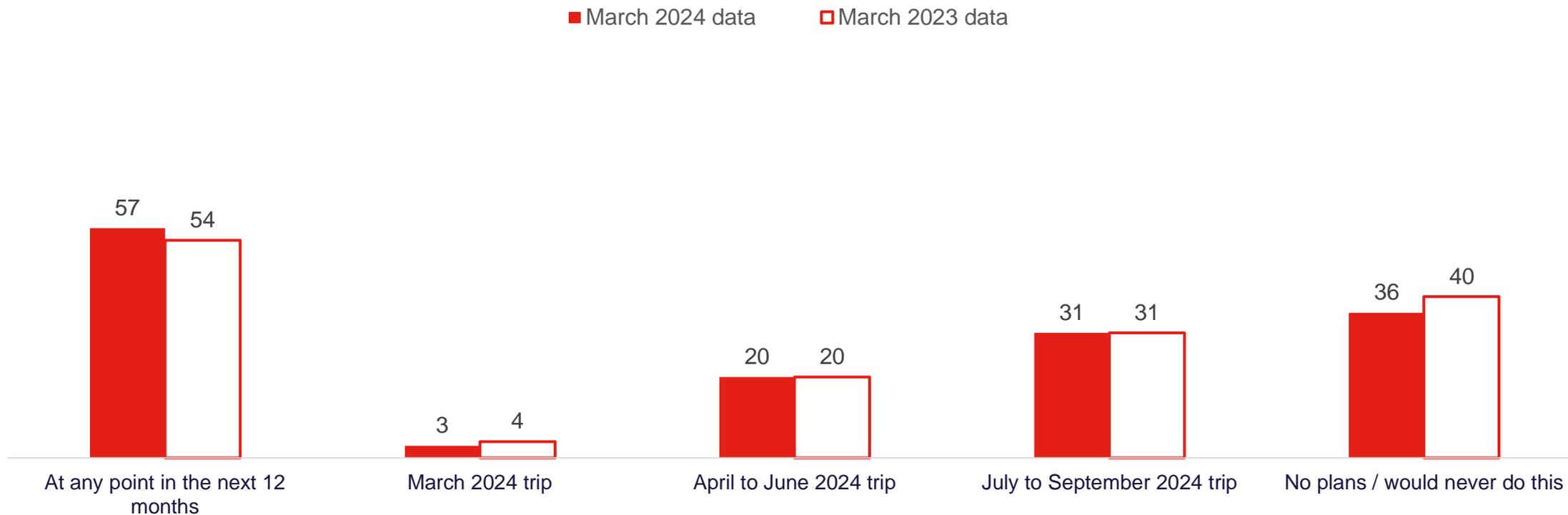
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, March 2024, UK



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. March 2023 = 1,755, March 2024 = 1,775. 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, 57% are planning an overseas trip in the next 12 months compared to 54% the year before

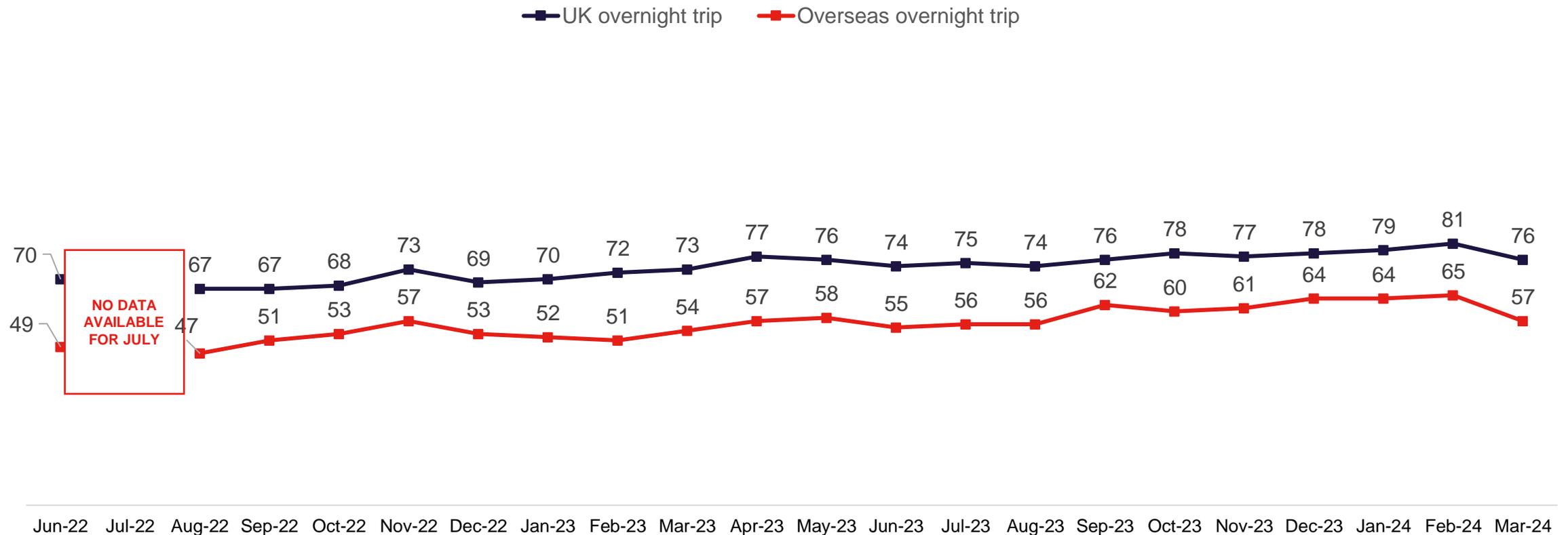
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, March 2024, UK



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. March 2023 = 1,755, March 2024 = 1,775. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Despite being ahead of levels this time last year, both long term domestic and overseas overnight trip intentions have decreased significantly since last month, and back to levels seen previously during summer 2023

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, March 2024, 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? 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 March 2024 = 1,775. 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 both intended domestic and overseas trips by UK adults is below those taken in the last 12 months – a significant deterioration from previous waves

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

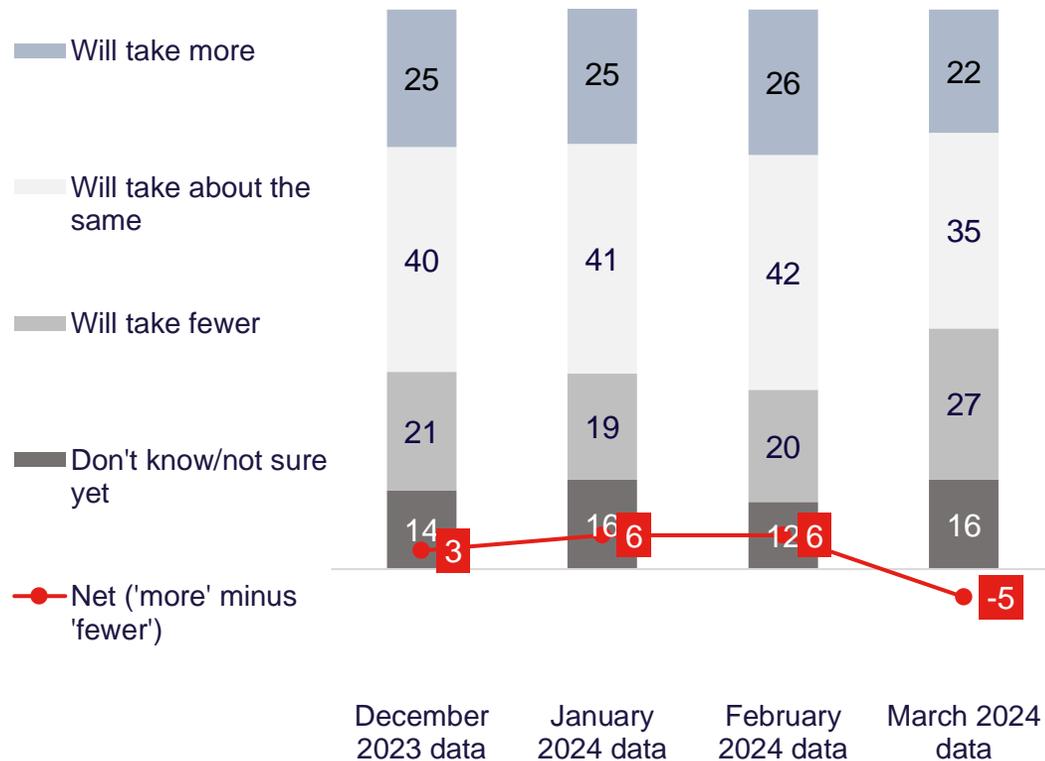
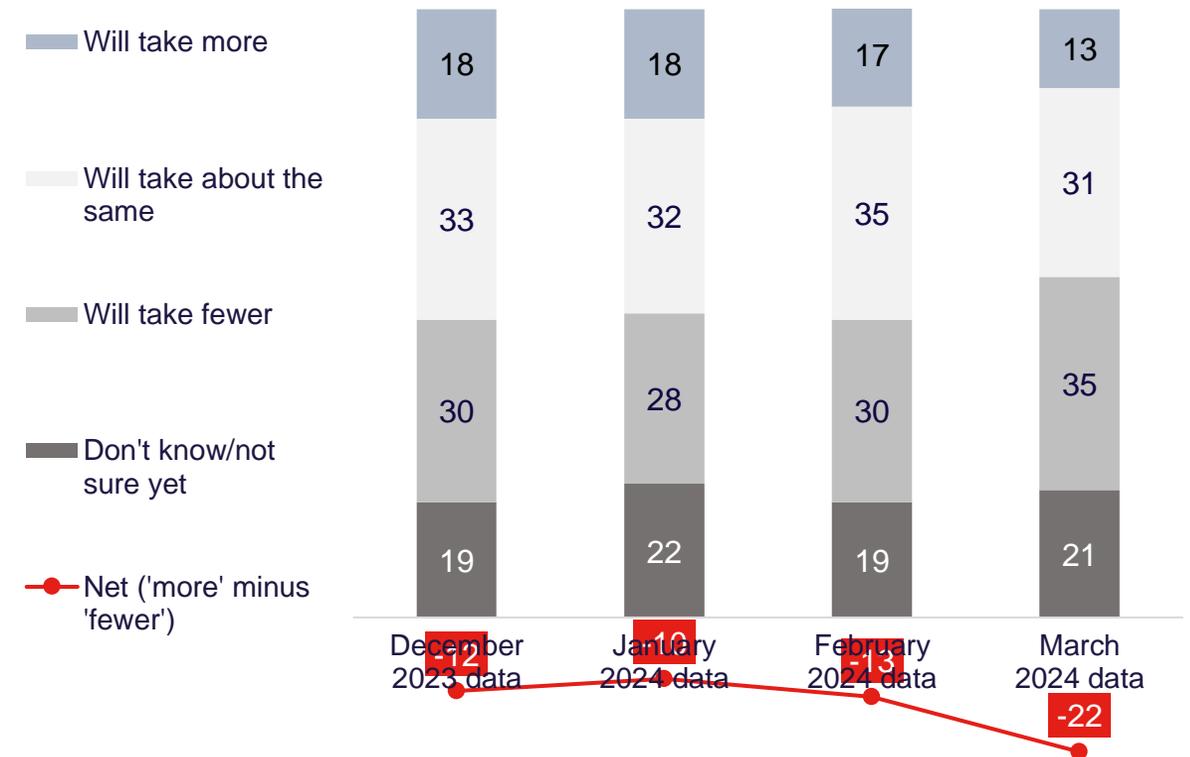


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, March 2024, UK



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. March 2024 = 1,775.

35% 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, March 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



TOP 5 reasons for UK preference

1. UK holidays are easier to plan (55%)
2. Shorter / quicker travel (51%)
3. UK holidays are cheaper (50%)
4. To avoid long queues at airports/cancelled flights (34%)
5. I want to take holidays in places I am familiar with (31%)

TOP 5 reasons for Overseas preference

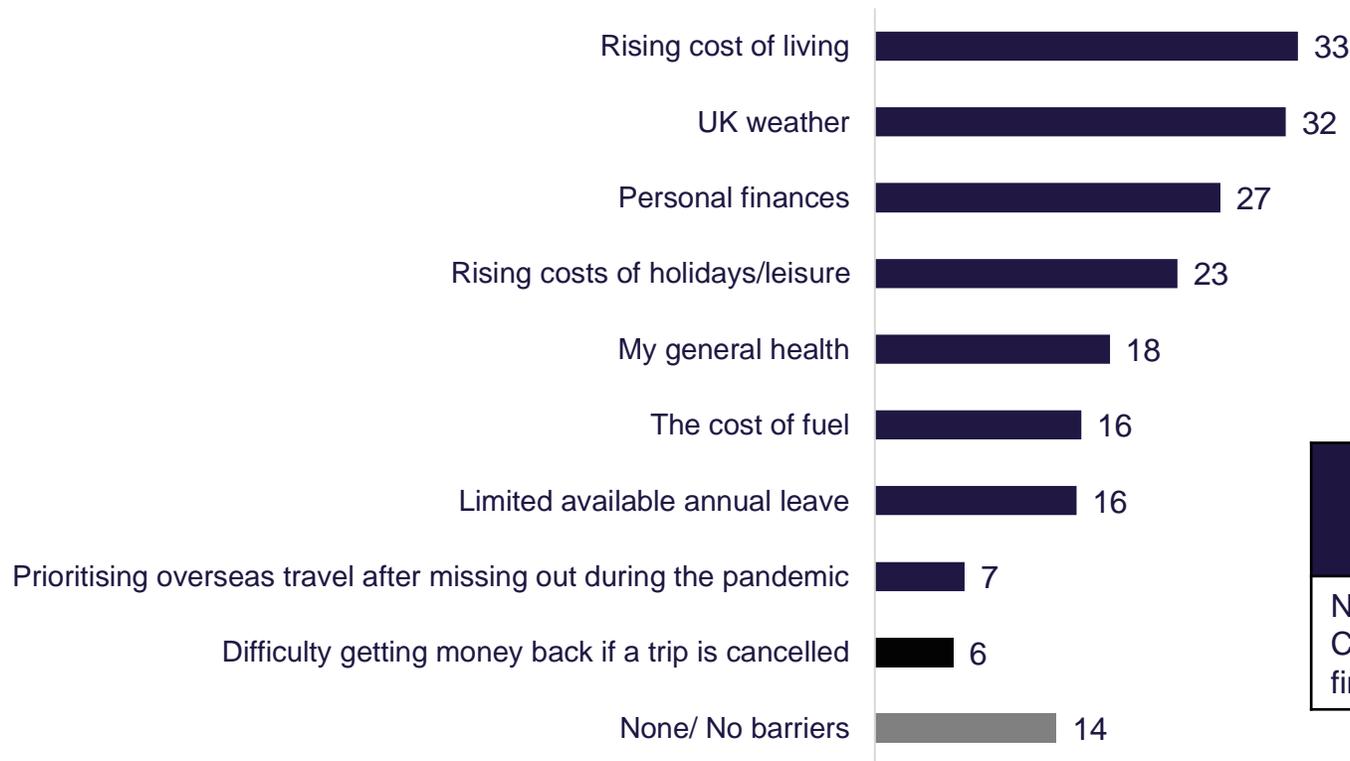
1. Better weather (47%)
2. I want to visit new places/experience new cultures (38%)
3. Overseas holidays are cheaper (25%)
4. I'm prioritising overseas trips after missing out in the last few years (23%)
5. To visit friends or relatives (18%)

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. March 2024 = 636. VB2k. Why are you more likely to choose a UK trip than an overseas trip? March 2024 = 467 VB2l. Why are you more likely to choose an overseas trip than a UK trip? March 2024 = 1,775.

The top potential barrier to taking overnight UK trips in the next 6 months is the 'rising cost of living' (33%), followed by 'UK weather' (32%) and 'personal finances' (27%)

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



	December 2023 data	January 2024 data	February 2024 data	March 2024 data
NET: Costs and finances	58%	58%	60%	57%

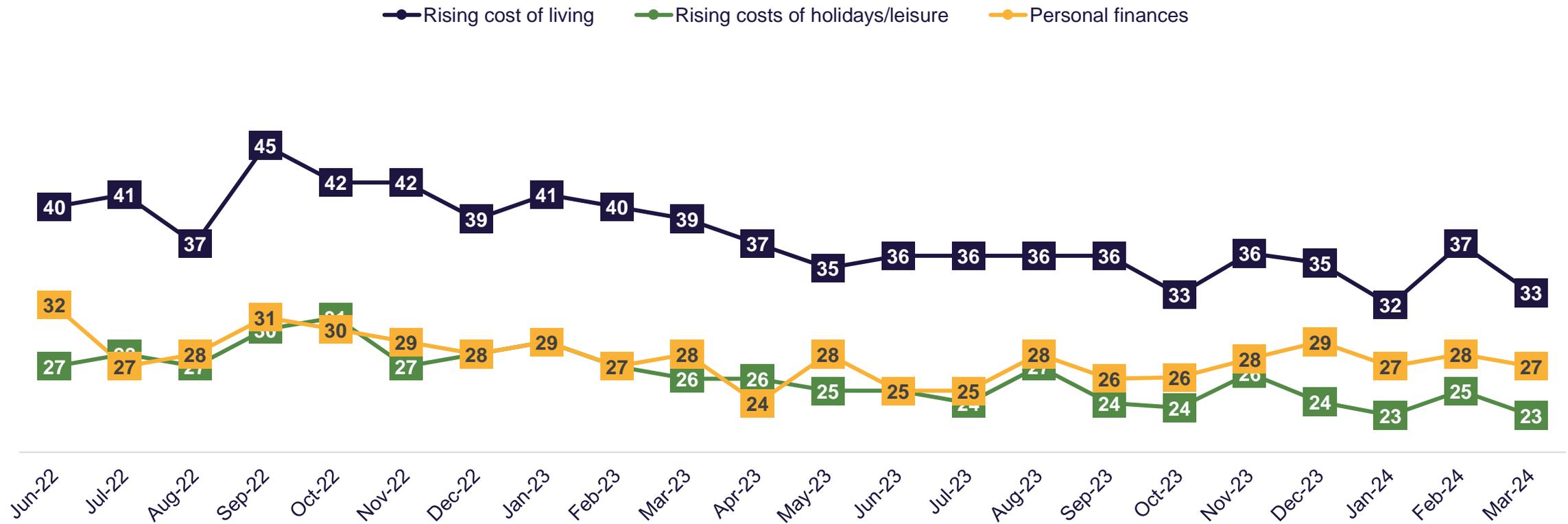
FOR THE FULL LIST OF BARRIERS, PLEASE SEE THE PUBLISHED TABLES.

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. March 2024 = 1,775. *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'

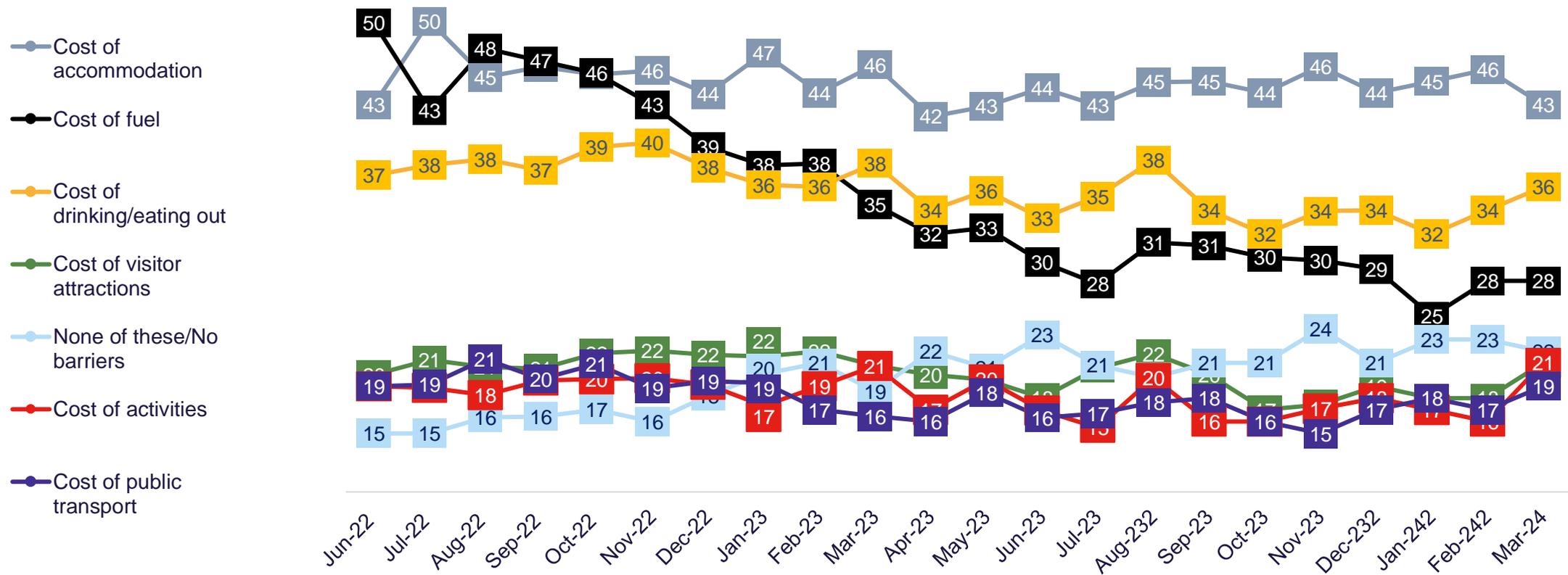
Figure 10b. Perceived financial barriers to an overnight trip in the UK in next 6 months, Wave-on-wave, Percentage, UK



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. March 2024 = 1,775.

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’ – the latter increasing for the second consecutive wave

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: March 2024 = 1,775.

UK adults plan to cut their overnight trip spending mainly on accommodation, eating out and activities. 28% will cut the number of overnight trips they take

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



Reduce the number of UK overnight trips	Dec 2023 data	Jan 2024 data	Feb 2024 data	Mar 2024
NET 'fewer', 'not go', 'go day trips instead'	27%	25%	27%	28%

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: March 2024 = 1,030. *Question format changed in March 2024.

In terms of UK day trips, 22% of UK adults intend to spend less on eating out. 31% will reduce the number of day trips – in line with previous waves

Figure 13b. 'Cost of living' impact on day trips, Percentage, March 2024, UK, Full list



Reduce the number of day trips	Dec 2023 data	Jan 2024 data	Feb 2024 data	Mar 2024 data
NET 'fewer', 'not go on day trips'	33%	31%	32%	31%

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: March 2024 = 945. *Question format changed in March 2024.



3. The Next Trip: Overnight and Day Trips

50% of UK adults have already booked their domestic trips for April, while 62% have already booked their overseas trips for the same month

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, March 2024, UK

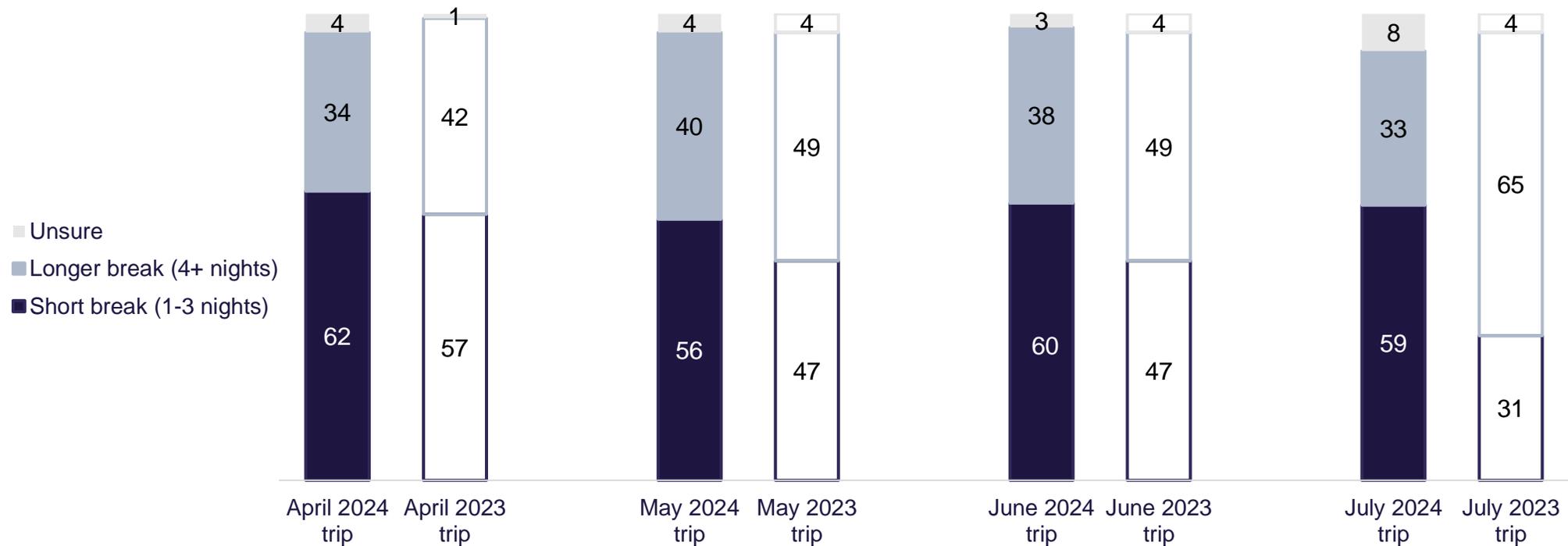
■ I have already booked the trip ■ I have decided where to go but not yet booked ■ I am yet to decide where to go ■ I am undecided whether I will take this trip at all



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: April 2024 n = 198, May 2024 n = 189, June 2024 n = 170, July 2024 n = 186. 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: April 2024 n = 78, May 2024 n = 115, June 2024 n = 125, July 2024 n = 130.

Short breaks are more likely between April to July 2024. This trend is different to last year, where longer breaks were relatively more likely

Figure 17. Length of next UK holiday or short break by time period, Percentage, March 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 March 2024 respondents intending to take next holiday or short break in each time period: UK trip 2023-2024: April 2024 n = 198, May 2024 n = 189, June 2024 n = 170, July 2024 n = 186.

The South West is the most preferred UK overnight destination in both April to June 2024 and July to September 2024

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

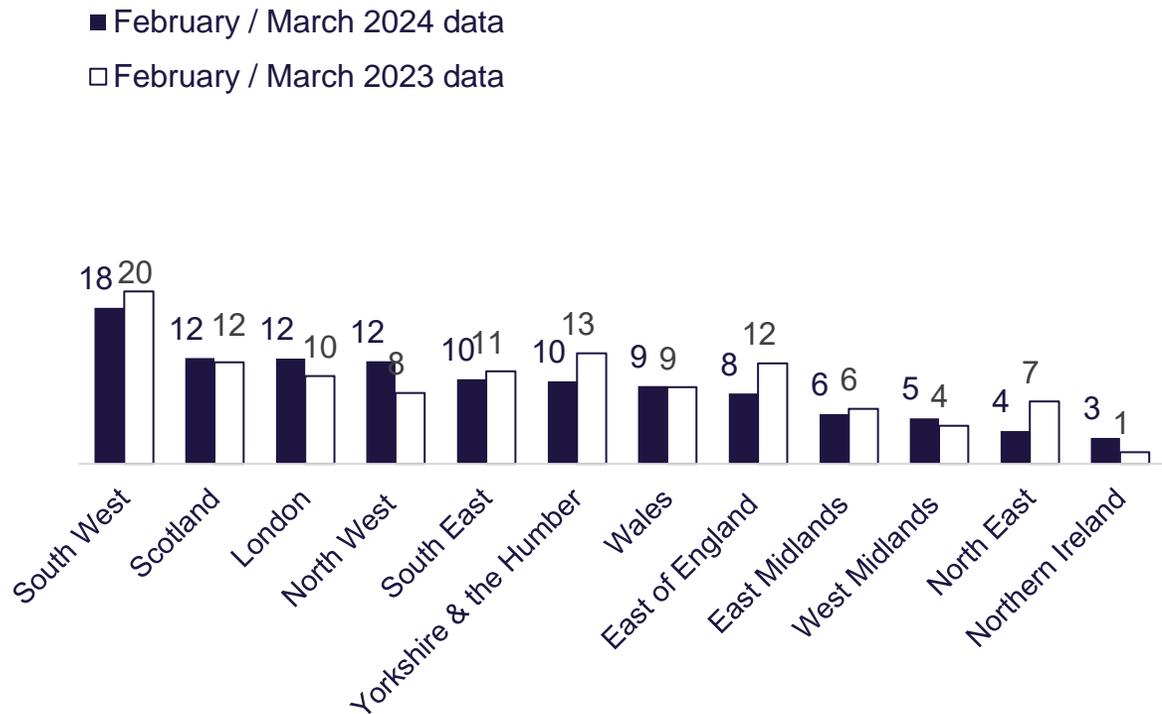
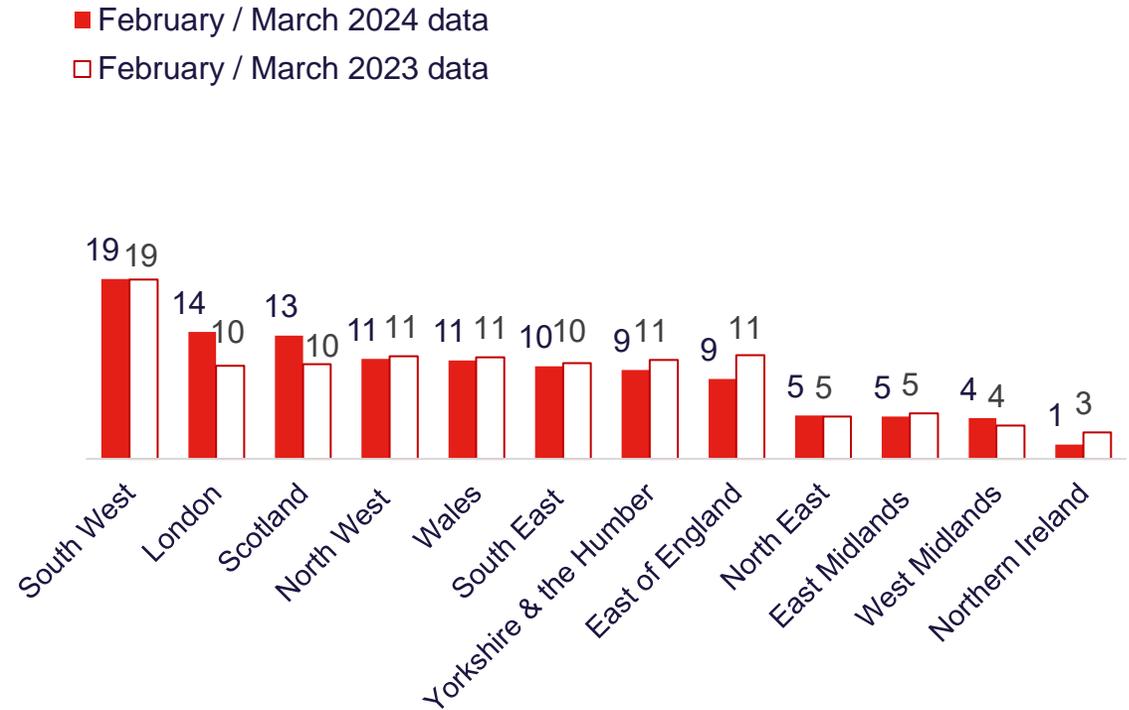


Figure 19. Where planning on staying on next UK overnight trip in July to September 2024, Percentage, February 2024 and March 2024, UK



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

Base: All February 2024 and March 2024 respondents planning on taking a holiday or short break in the UK April to June 2023 n = 952, July to September 2023 n = 1,014; April to June 2024 n = 1,129, July to September 2024 n = 933. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

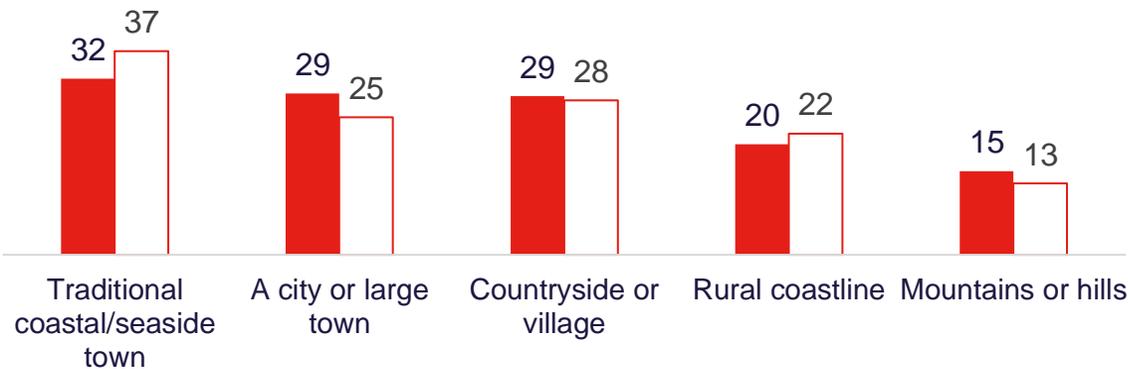
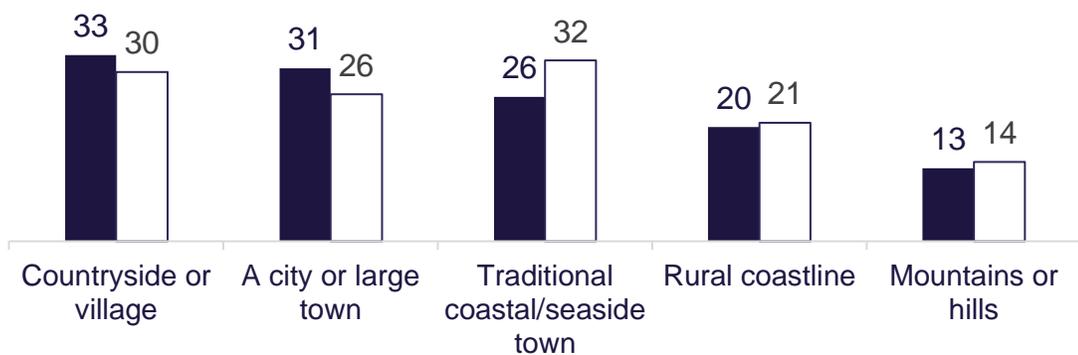
The top type of destination for overnight trips for April to June 2024 is 'Countryside or village', while it is 'Traditional coastal/seaside town' for the July to September 2024 period

Figure 20. Types of destination for trip in April to June 2024, Percentage, February 2024 and March 2024, UK

Figure 21. Types of destination for overnight trip in July to September 2024, Percentage, February 2024 and March 2024, UK

■ February / March 2024 data
□ February / March 2023 data

■ February / March 2024 data
□ February / March 2023 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 February 2024 and March 2024 respondents planning on taking a holiday or short break in the UK in the UK April to June 2024 n = 1,129, July to September 2024 n = 933

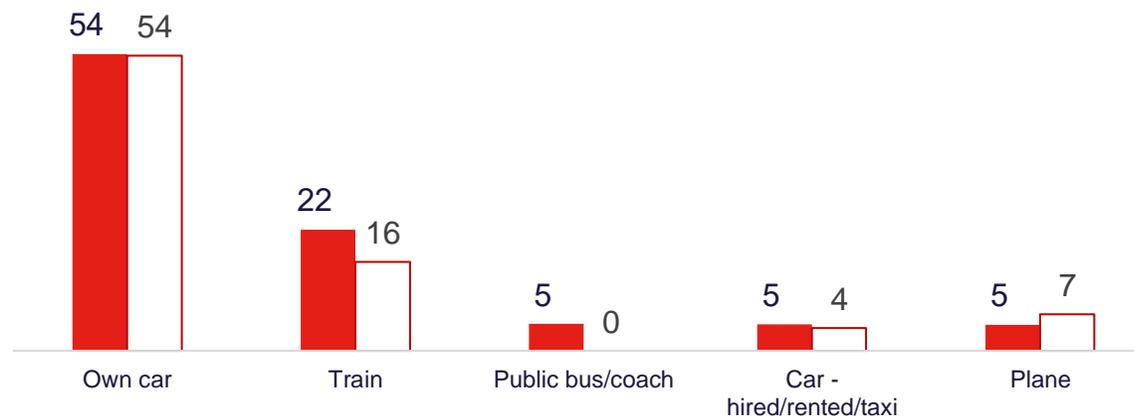
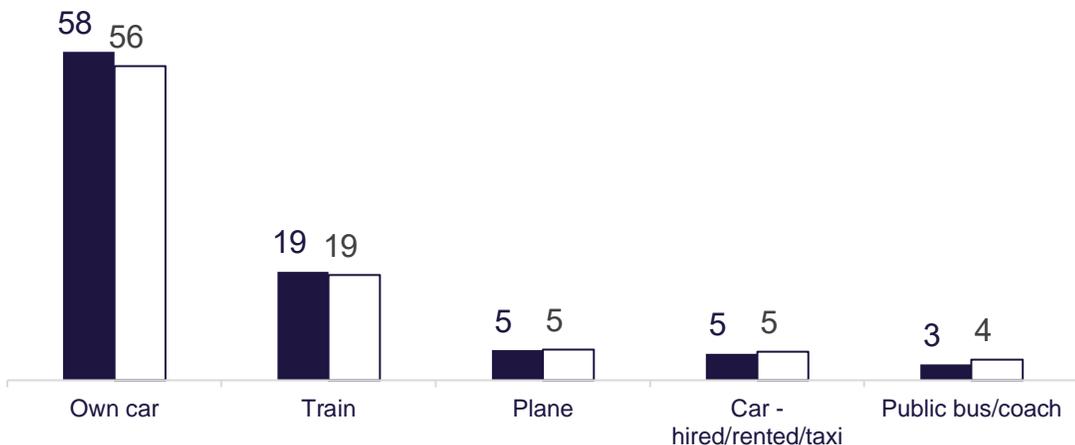
For both time periods, own car is the most common mode of travel, followed by train

Figure 22. Top 5 main modes of travel to destination for trip in April to June 2024, Percentage, February 2024 and March 2024, UK

Figure 23. Top 5 main modes of travel to destination for overnight trip in July to September 2024, Percentage, February 2024 and March 2024, UK

■ February / March 2024 data
□ February / March 2023 data

■ February / March 2024 data
□ February / March 2023 data



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 February 2024 and March 2024 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1,014; April to June 2024 n = 1,129, July to September 2024 n = 933

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 April to June 2024, Percentage, February 2024 and March 2024, UK

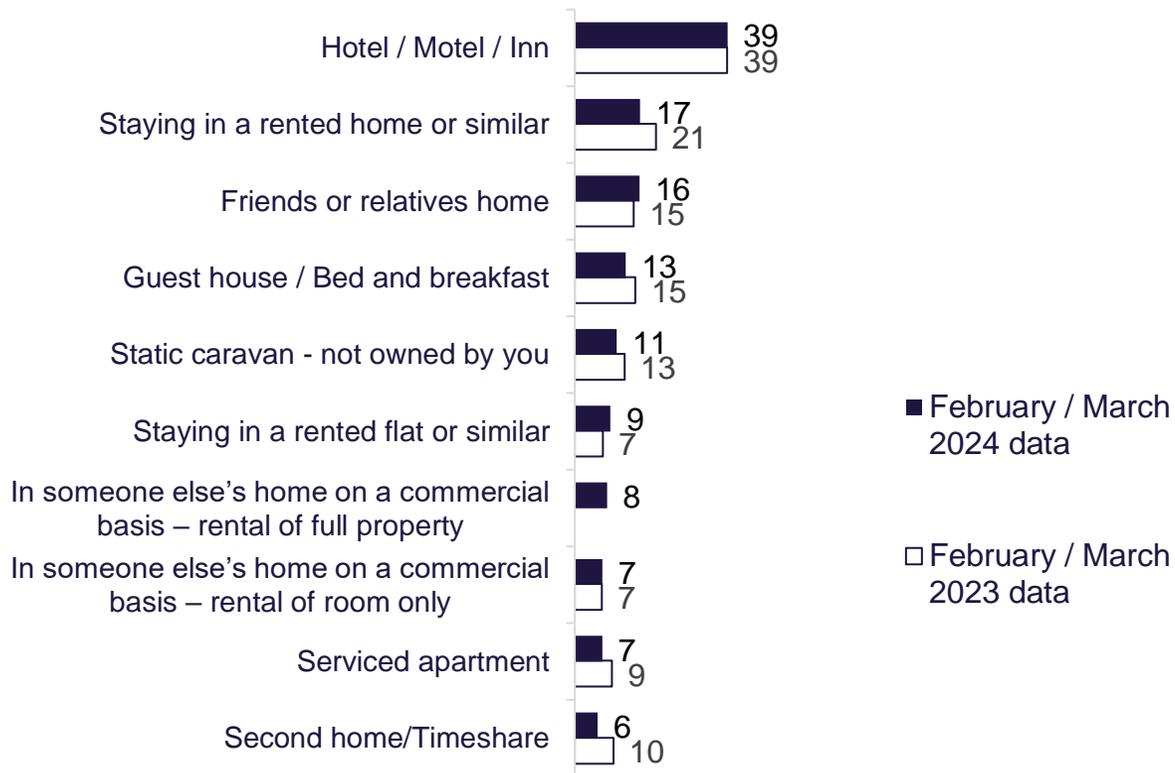
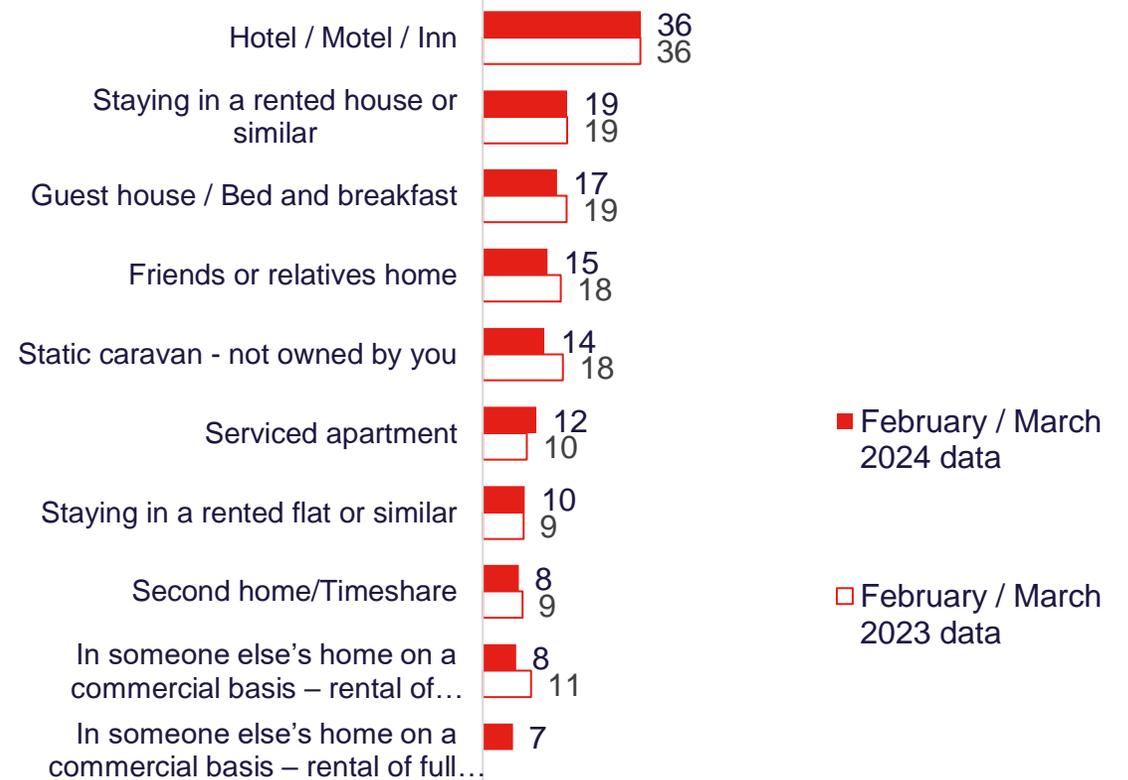


Figure 25. Top 10 accommodation types planning on staying in on next UK overnight trip in July to September 2024, Percentage, February 2024 and March 2024, UK



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 February 2024 and March 2024 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1,014; April to June 2024 n = 1,129, July to September 2024 n = 933

'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 April to June 2024, Percentage, February 2024 and March 2024, UK

■ February / March 2024 data
□ February / March 2023 data

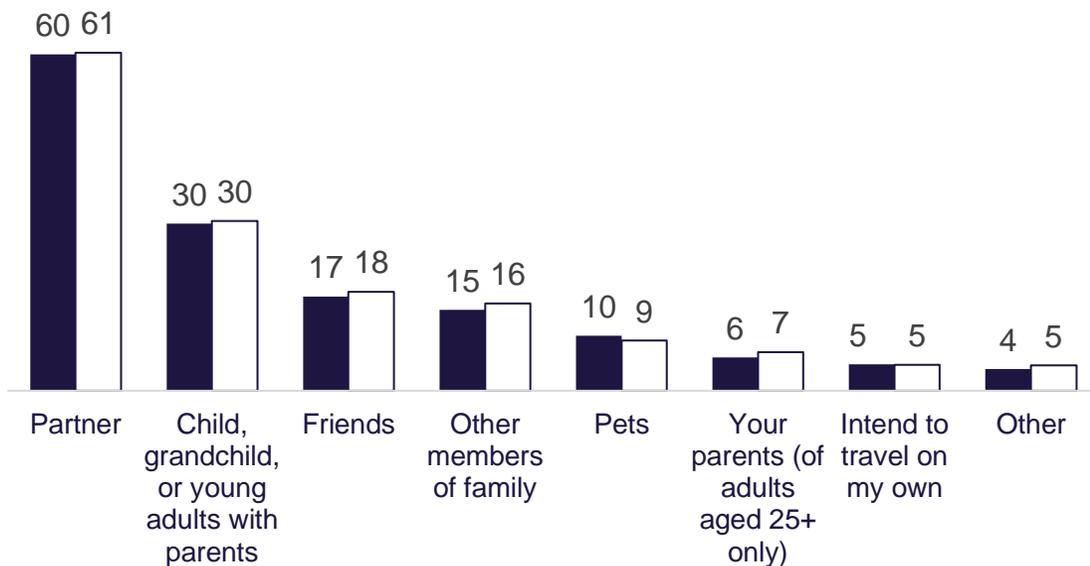
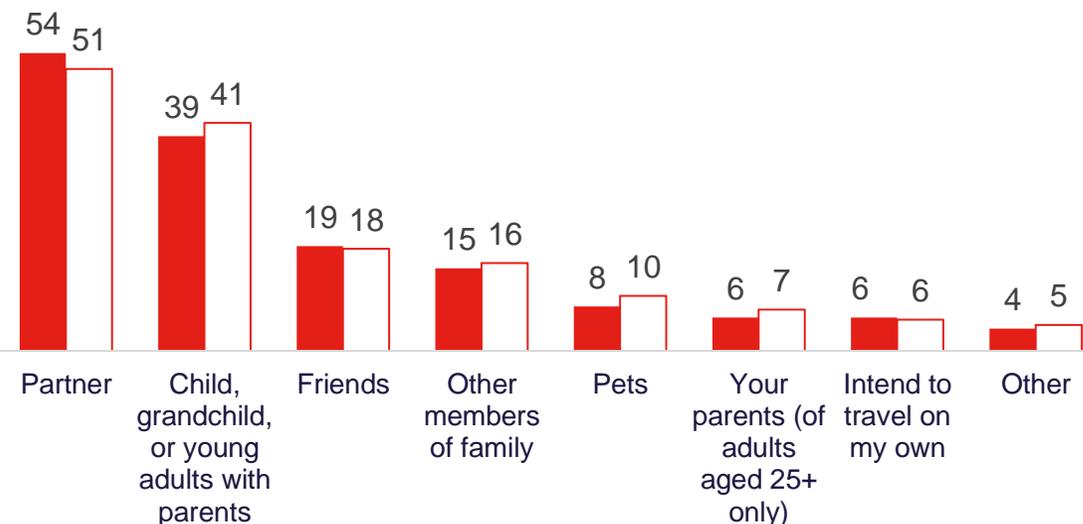


Figure 27. Visitor party make-up for trip in July to September 2024, Percentage, February 2024 and March 2024, UK

■ February / March 2024 data
□ February / March 2023 data



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 February 2024 and March 2024 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1,014; April to June 2024 n = 1,129, July to September 2024 n = 933

The top motivation for overnight trips in April to June 2024 is ‘family time or time with my partner’, while in July to September 2024 ‘to get away from it all and have a rest’ is top

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



Figure 29. Motivations for UK holidays and short breaks in July to September 2024, Percentage, March 2024, UK, Full list



Question: VB6fii. Which of the following best describe your motivation/s for this trip?

Base: All March 2024 respondents planning on taking a holiday or short break in the UK between April to June 2024 n = 557, July to September 2024 n = 508.

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

The top activity in both time periods is ‘Trying local food and drink’, followed by ‘Walking, hiking or rambling’

Figure 30. Activities for UK holidays and short breaks, in April to June 2024, Percentage, March 2024, UK, Full list

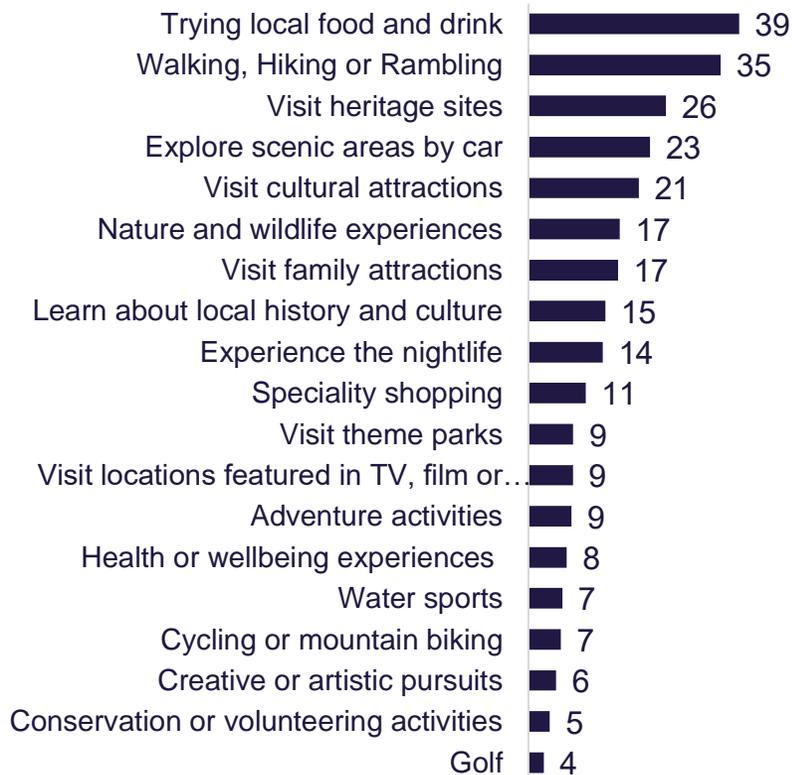


Figure 31. Activities for UK holidays and short breaks in July to September 2024, Percentage, March 2024, UK, Full list



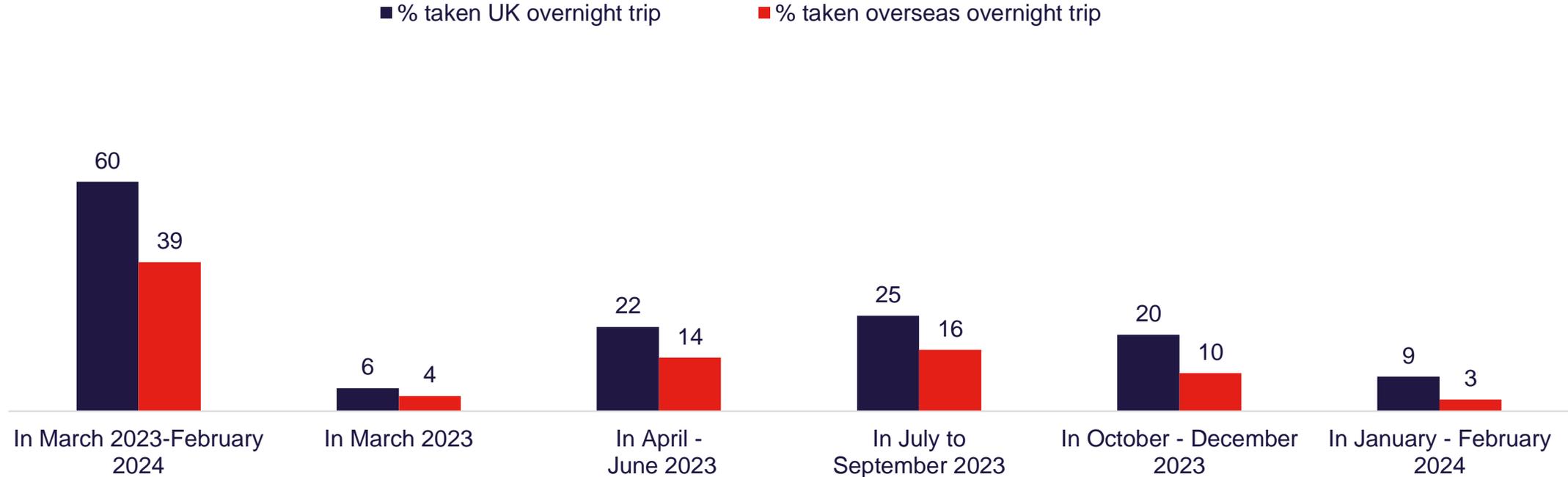
Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
 Base: All March 2024 respondents planning on taking a holiday or short break in the UK between April to June 2024 n = 557, July to September 2024 n = 508.
 Note: Multiple choice question. Totals may exceed 100%. *Visited theme parks was added to the list in March 2024



4. Past UK and Overseas Trips

3 in 5 (60%) have taken a UK overnight trip between March 2023 and February 2024, while 39% 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, March 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?

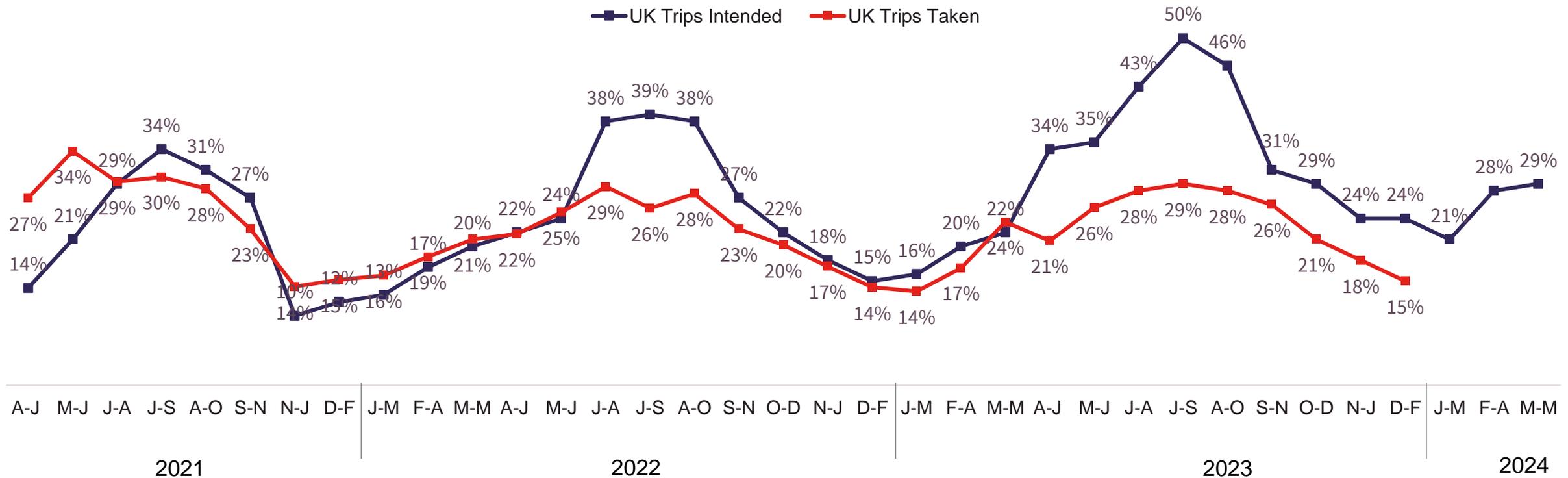
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?

Base: All respondents March 2024 = 1,775.

Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

15% of respondents went on a domestic overnight trip between December 2023 and February 2024, compared to 24% who had previously intended to do so

Figure 32b. Incidence of UK short breaks or holidays intended within next 3 month and taken in last 3 months of UK adult population, Percentage, February 2024, UK



VB2a. 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?

VB13a: Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK in the last 12 months? Base: All UK respondents = 1755. Data shows the proportion intending to take a trip within the next 3 months – this will not account for intentions established less than 3 months ahead of trip date – and trips taken. Actual trips taken is only available from April 2021 up to February 2024.

North West is the most popular destination for domestic trips in the past three months, followed by South West, London and South East

Figure 33. Destination of overnight trips taken in UK in the past three months, Percentage, March 2024, UK



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 March 2024 respondents that took an overnight trips in the last three months n= 263

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 (March 2024 data)

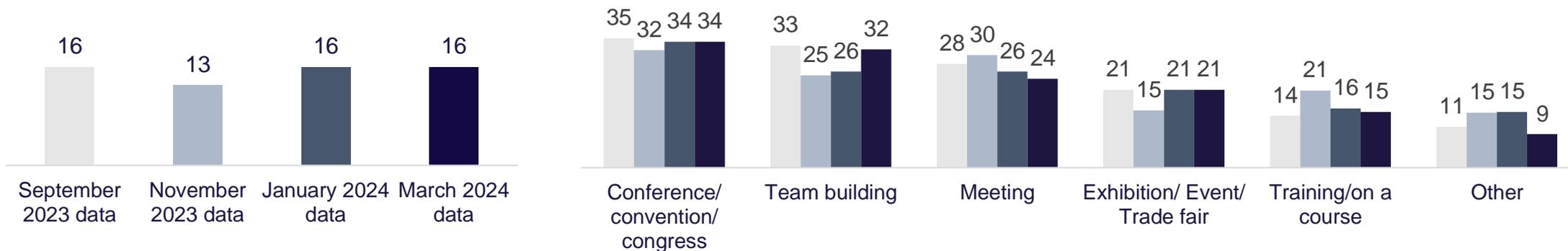
16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. 'Conference' is the leading reason (34%), followed by 'Team Building' (32%)

Figure 35. Proportion anticipating an overnight business trip in next 3 months, Percentage, March 2024, UK adults in employment

Figure 36. Reasons for taking an overnight business trip in next 3 months, Percentage, March 2024, UK adults in employment planning a trip

■ September 2023 data ■ November 2023 data ■ January 2024 data ■ March 2024 data

80% of UK adults interviewed are in employment



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: March 2024 respondents currently in employment n = 1,775. All taking a business trip n=310.



Methodology & Further Data

Methodology

- This report presents findings from the March 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.

Master Data Table

- 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.

