

Domestic Sentiment Tracker

August 2022

Published: August 2022
Fieldwork Period: 1st – 7th August 2022

UK Results



Contents

- 1. Current General Sentiment (slides 6-10)**
- 2. Trip Intentions: UK and overseas (slides 11-22)**
- 3. The Next Trip: Overnight and Day Trips (slides 23-33)**
- 4. Past UK and Overseas Trips (slides 34-36)**
- 5. Overnight Business Trip Intentions* (slides 37-38)**
- 6. Methodology (slides 39-41)**

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 and Covid-19, 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 – 7th August 2022.
- 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.

- **August to September 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between August and September 2022
- **October to December 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between October and December 2022

August 2022: Scorecard of Key Metrics

Key Metrics	August 2022	Change since July 2022
Perceptions of the situation regarding <u>Covid-19</u> (% stating 'WORST IS STILL TO COME')	21%	-6%*
Perceptions of the situation regarding <u>cost of living crisis</u> (% stating 'WORST IS STILL TO COME')	76%	+2%
Comfort with everyday activities (average score out of 4)	3.2	+0.1
Confidence in ability to take UK overnight trip in August / September / October (% NET confident)	74% / 73% / 71%	+1% / +2% / +1%
Confidence in ability to take overseas overnight trip in August / September / October (% NET confident)	55% / 55% / 55%	+4%* / +4%* / +4%*
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	16%	+4%
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-14%	+2%
Proportion intending a UK overnight trip <u>at any point in the next 12 months</u>	67%	NA ^A
Proportion intending an overseas overnight trip <u>at any point in the next 12 months</u>	47%	NA ^A
Top 3 barriers to taking a UK overnight trip from August to September	1 st Rising cost of living; 2 nd The cost of fuel; 3 rd Personal finances	Personal finances moves up to 3 rd place (with UK weather moving from 3 rd down to 5 th place)

* Represents a statistically significant change on previous wave

^A DATA COMPARISON VS JULY IS NOT POSSIBLE DUE TO A TEMPORARY CHANGE IN THE QUESTION IN JULY.



VisitBritain™



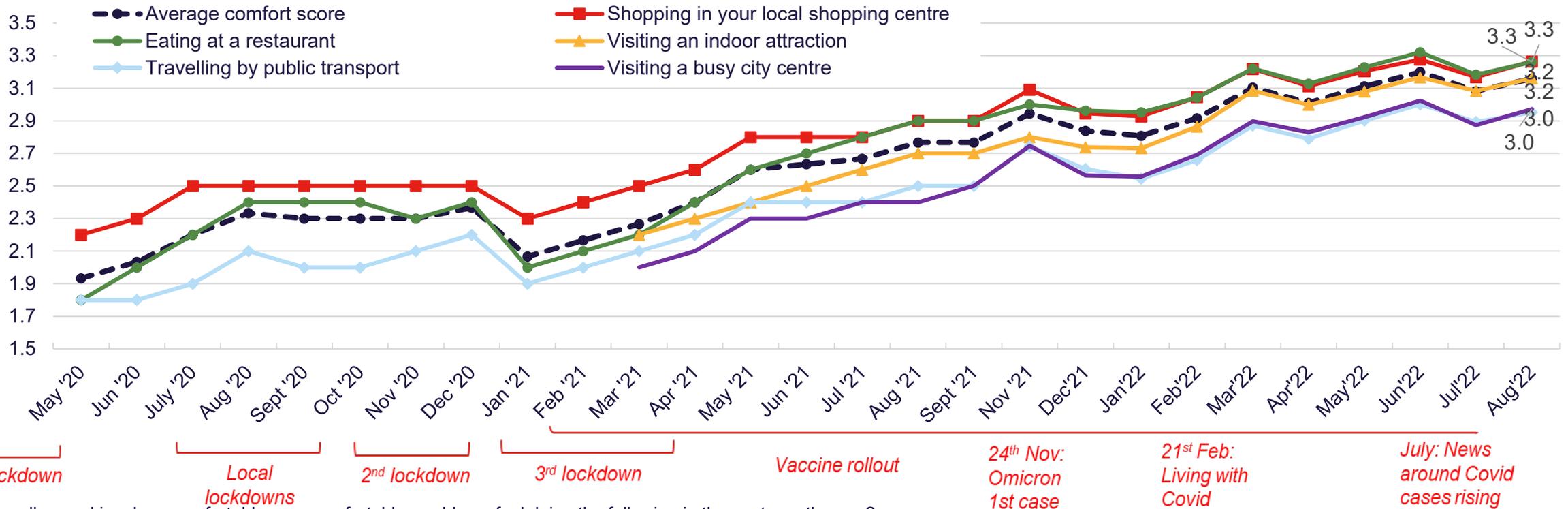
VisitEngland™

1. Current General Sentiment

Comfort levels with everyday activities

Comfort levels with all everyday activities have increase slightly in August for all activities tracked below, with the 'average comfort score' rising from 3.1 to 3.2.

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



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?

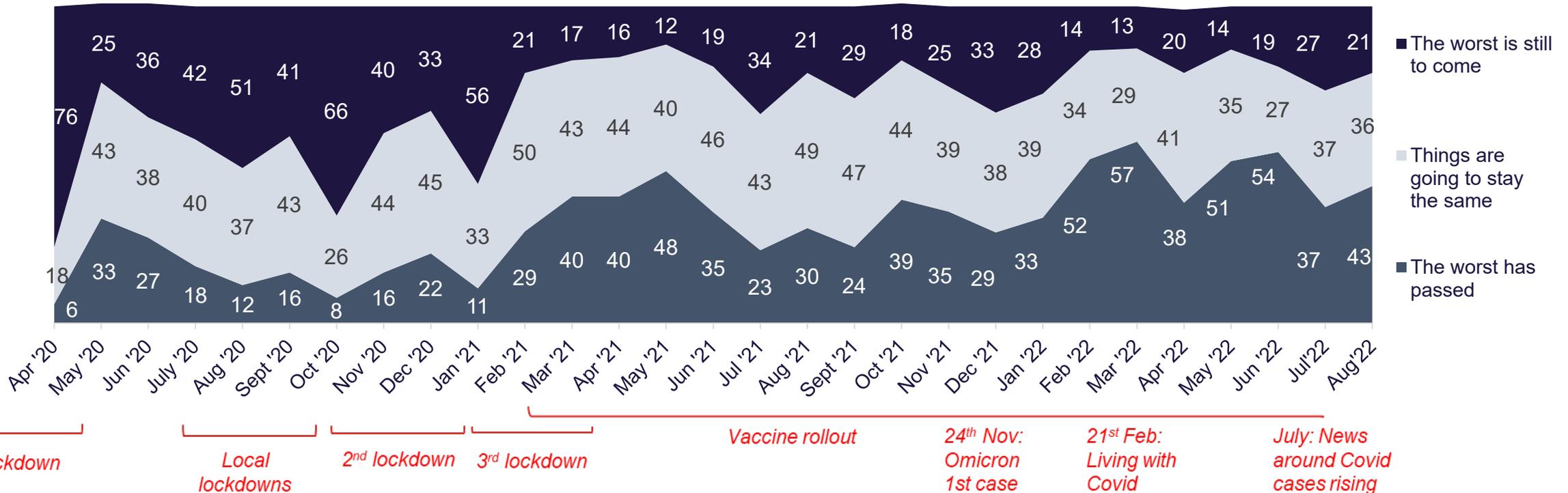
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. August 2022 = 1,759 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750

Note: These questions were not asked in October 2021

Perceptions of the situation relating to COVID-19

From July to August, the proportion of those who think 'the worst is still to come' in relation to COVID-19 has decreased again, moving from 27% to 21%. Now, more perceive the worst to have passed.

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK

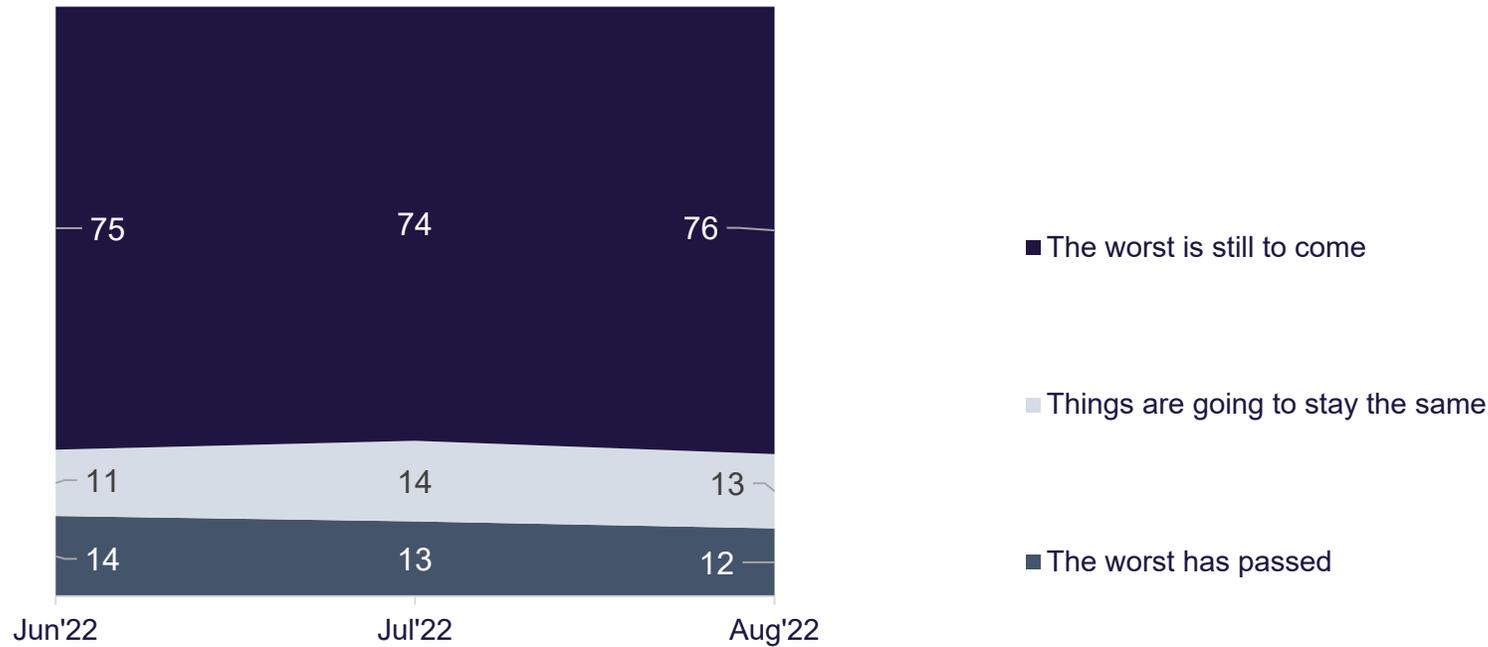


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: All respondents. August 2022 = 1,759 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
 Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Perceptions of the situation relating to cost of living crisis

Three quarters (76%) of UK adults think 'the worst is still to come' in relation to the cost of living crisis, in line with the last two months.

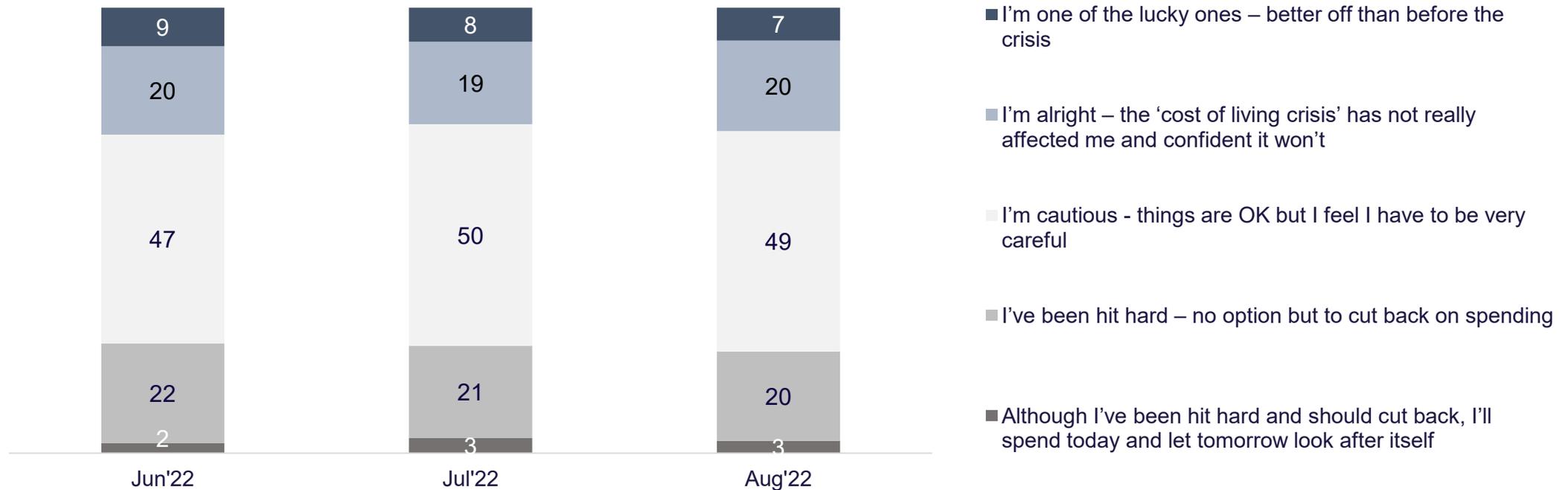
Figure 3. Perception of the situation with regards to cost of living crisis, Percentage, UK



Feelings about the situation relating to cost of living crisis

49% feel things 'are OK' but they 'have to be careful', which is fairly consistent with results reported in July 2022. Further 20% have been 'hit hard' and had to cut back on spending

Figure 4. Feelings about situation during the 'cost of living crisis', Percentage, UK



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. August 2022 = 1,759



VisitBritain™



VisitEngland™

2. Trip Intentions: UK and overseas

Overnight trips intentions – UK trips

67% of UK adults plan on taking an overnight domestic trip at some point in the next 12 months. In June, looking three months ahead, 20% were planning a trip in September, which is now only 16% as we near September. Just over a quarter are expecting to take a trip in October to December this year.

Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, August 2022, UK



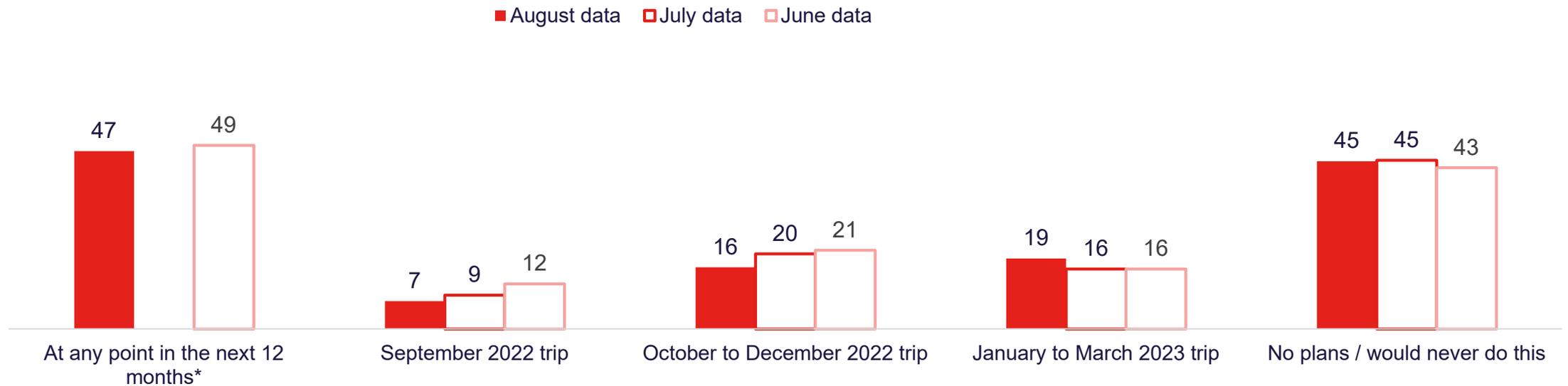
QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. July 2022 = 1,759, August 2022 = 1,759 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

*DATA COMPARISON VS JULY IS NOT POSSIBLE DUE TO A TEMPORARY CHANGE IN THE QUESTION IN JULY.

Overnight trips intentions - Overseas

Nearly half (47%) of UK adults are anticipating an overseas trip at some point in the next 12 months. Looking back at June, 12% were planning overseas trips for September, however, this has since dropped to 7% in the August data.

Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, August 2022, UK



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?

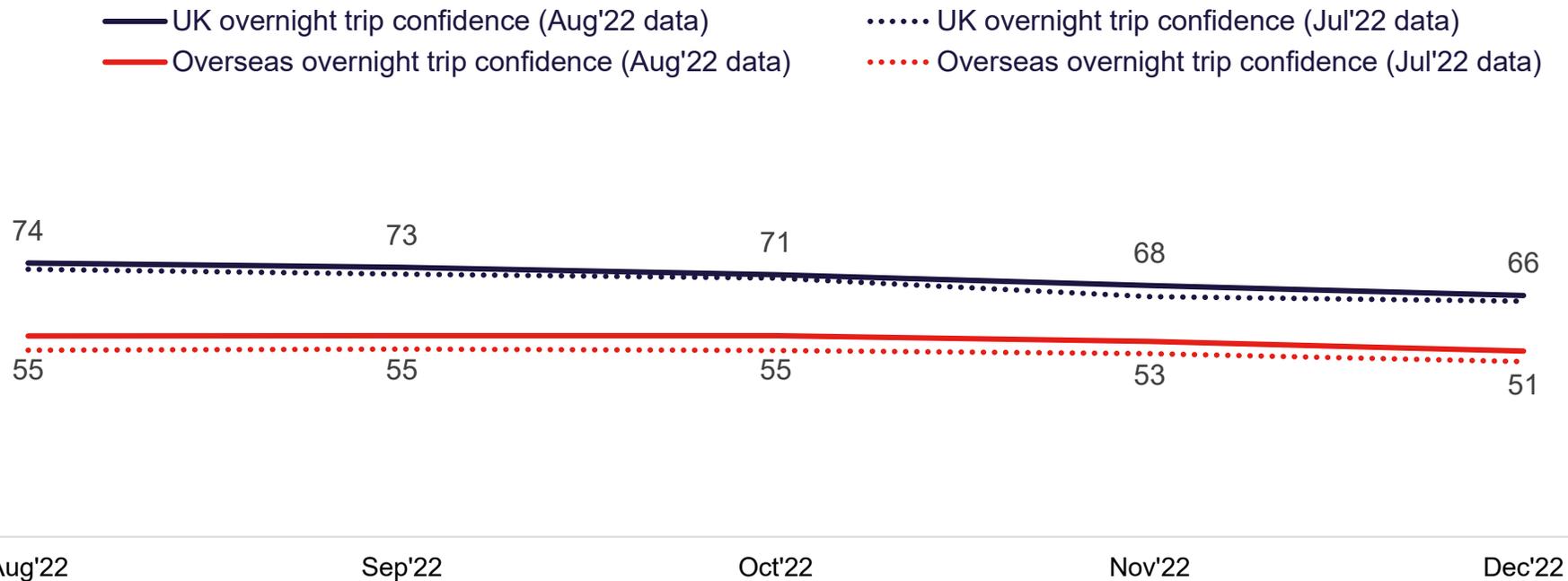
Base: All respondents. July 2022 = 1,759, August 2022 = 1,759 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

* DATA COMPARISON VS JULY IS NOT POSSIBLE DUE TO A TEMPORARY CHANGE IN THE QUESTION IN JULY

Confidence in the ability to take an overnight trip

Overnight trip confidence levels for both domestic and overseas trips slightly increase on those reported in July 2022. Confidence is highest for immediate months (August and September 2022) and gradually decreases. Consistent with previous research, domestic confidence levels drop from November onwards.

Figure 6. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, July and August 2022, UK



VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months? VB7d. We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?
Base: All respondents. July 2022 = 1,759, August 2022 = 1,759.

Anticipated number of UK and overseas trips in next 12 months compared to pre-pandemic

The net number of trips ('more' minus 'fewer') for domestic and overseas trips has since returned to levels seen in June after a slight dip in July. 31% of UK adults intend to take more domestic overnight trips in the next 12 months compared to pre-pandemic, while 30% intend to take fewer overseas trips, suggesting a switch from overseas to domestic travel.

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, August 2022, UK

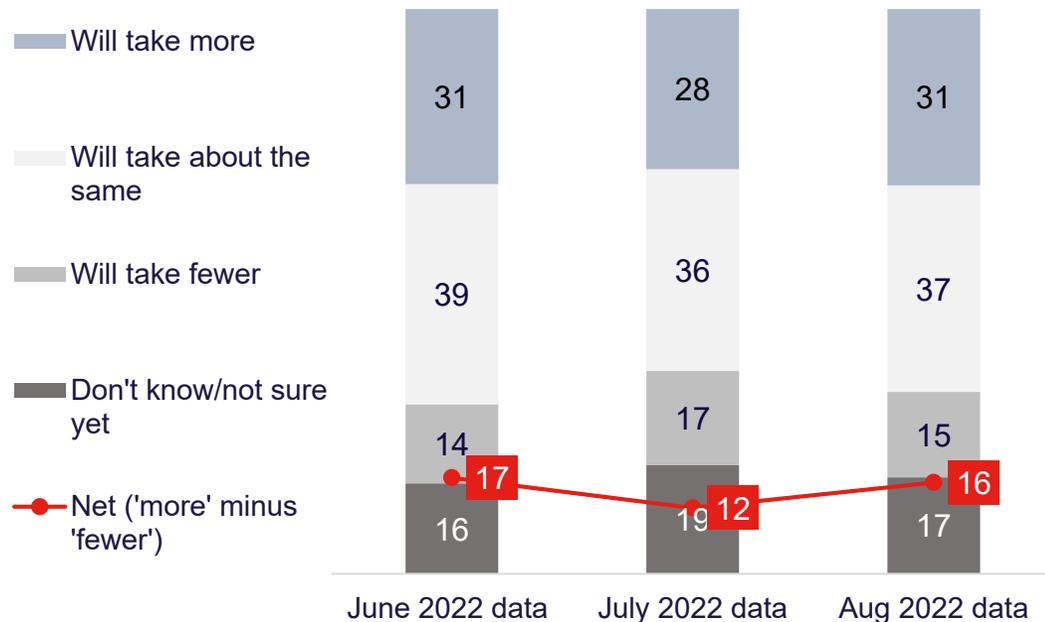
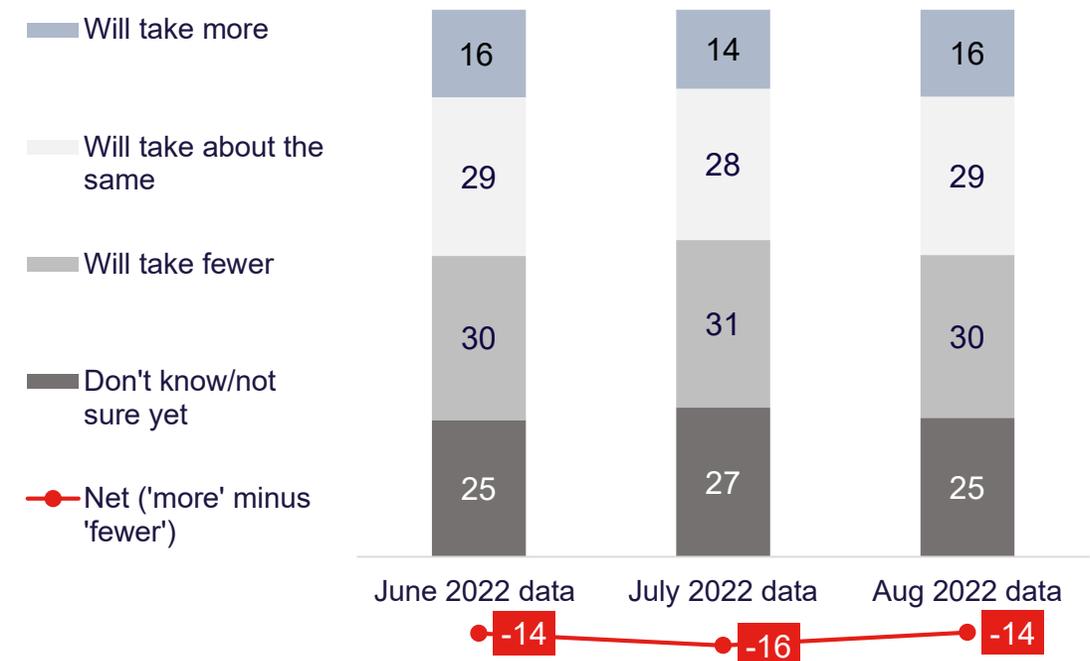


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, August 2022, UK



Anticipated change in UK and overseas trips in next 6 months compared to pre-pandemic

39% of respondents indicated they are more likely to choose a UK trip than an overseas trip, compared to pre-pandemic. The top reasons for UK preference is 'UK holidays are easier to plan' (67%), and 'avoiding long queues at airports/cancelled flights' (50%). For the 19% who would choose an overseas trip over a UK trip, the main reason is 'better weather' (40%).

Figure 9. Difference in short break/holiday choices in the next 6 months compared to pre-pandemic, Percentage, August 2022, UK



TOP 5 reasons for UK preference

1. UK holidays are easier to plan (67%)
2. To avoid long queues at airports/cancelled flights (50%)
3. UK holidays are cheaper (49%)
4. Shorter / quicker travel (44%)
5. To avoid long queues at ports/ Channel crossing (39%)

TOP 5 reasons for Overseas preference

1. Better weather (40%)
2. I want to visit new places (34%)
3. I'm prioritising overseas trips after missing out during the pandemic (29%)
4. Overseas holidays are cheaper (25%)
5. I want to explore other cultures (23%)

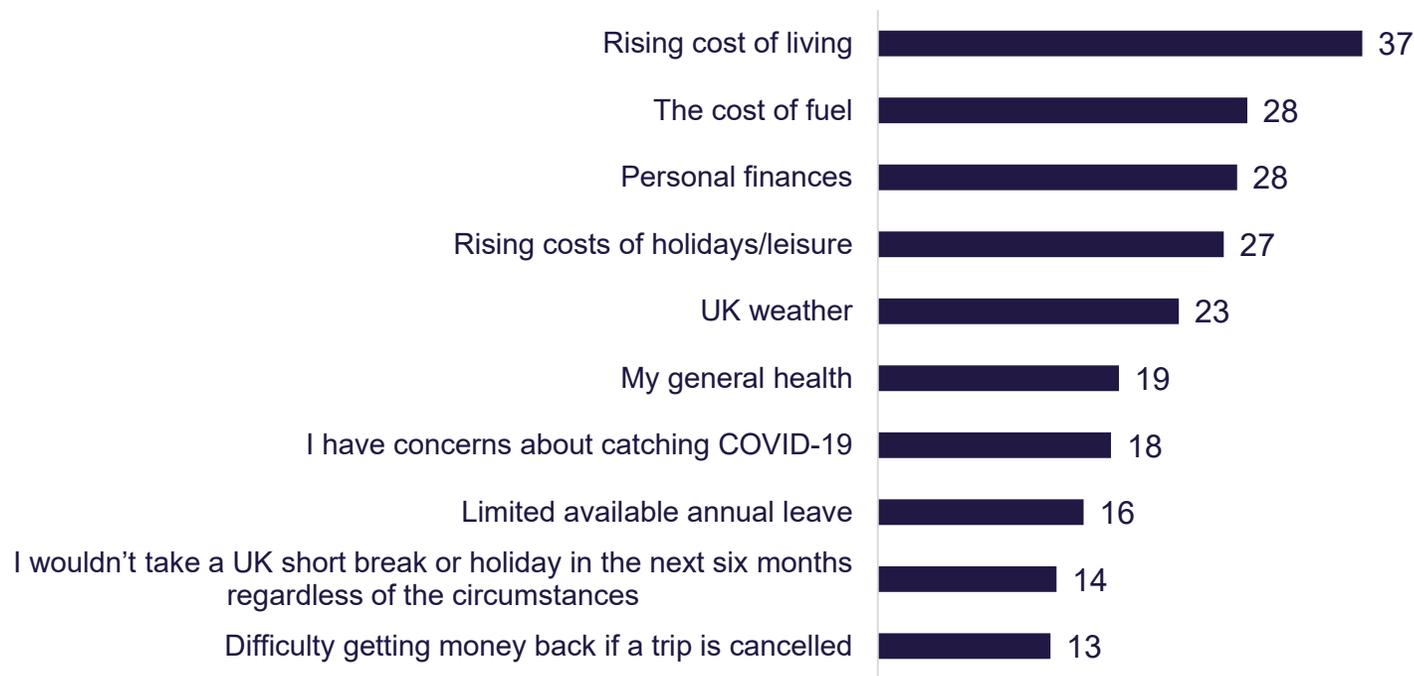
FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.

VB2j. Thinking of the next 6 months, how different do you think your short break/holiday choices will be compared to before the COVID-19 pandemic? Base: All respondents. August 2022 = 1,759. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? August 2022 = 700, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? August 2022 = 362

Perceived barriers to taking overnight UK trips in next 6 months

The 'rising cost of living' is the biggest perceived barrier to taking overnight UK trips in the next 6 months (37% stating this), followed by 'the cost of fuel' (28%) and 'personal finances' (28%). At a net level, 'costs and finances' as barrier declined for a second consecutive wave.

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, August 2022, UK



	June 2022 data	July 2022 data	August 2022 data
NET: Costs and finances	67%	64%	60%

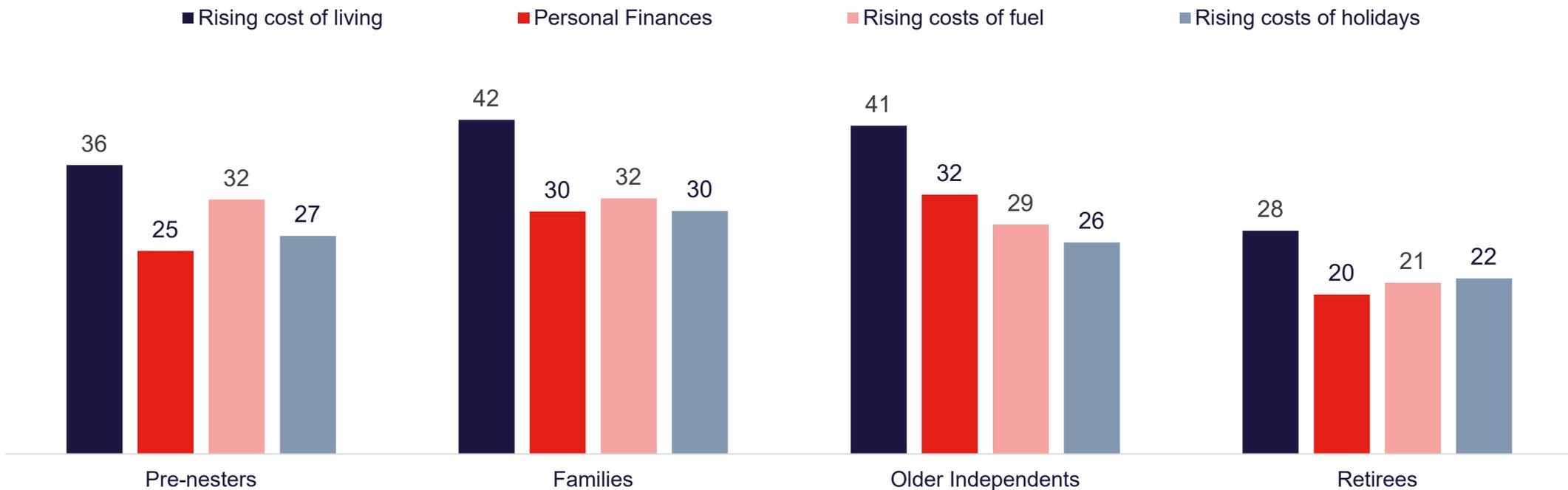
FOR THE FULL LIST OF BARRIERS, PLEASE SEE THE PUBLISHED TABLES.

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. August 2022 = 1,759. *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'

Finance related barriers to taking overnight UK trips in next 6 months

The 'rising cost of living' is the top financial barrier across all life stages, most prominent among families and older independents.

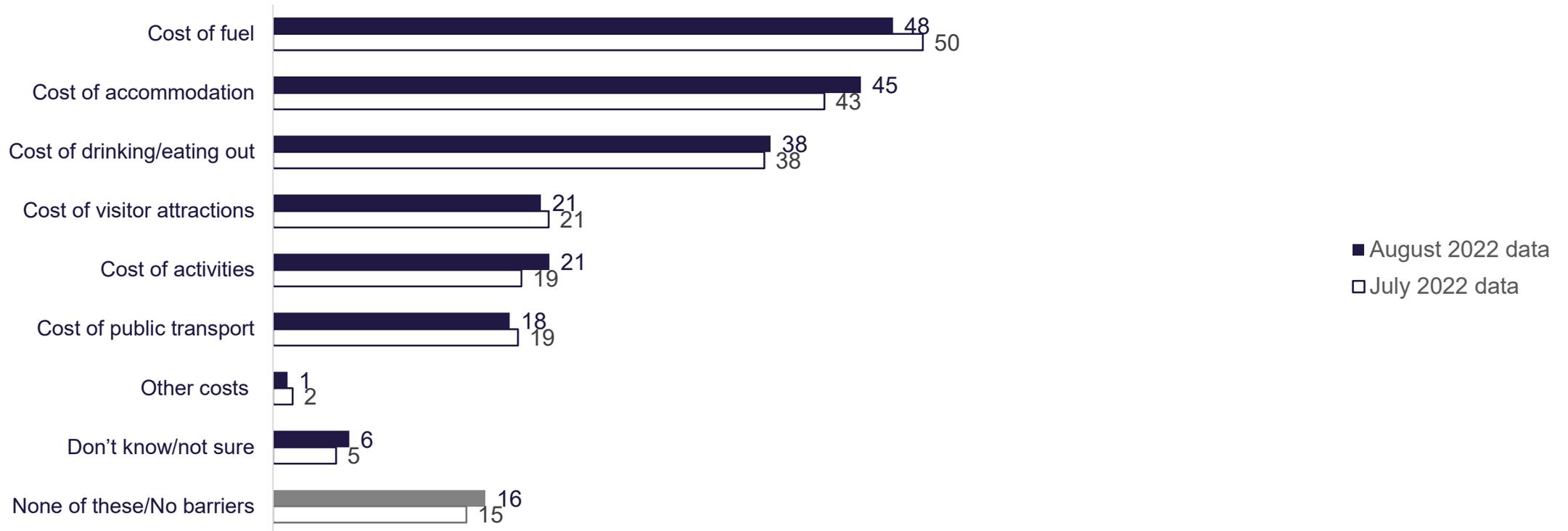
Figure 11. Perceived financial barriers as a potential barrier to taking an overnight trip in the UK in next 6 months, Percentage, August 2022, UK



Individual trip costs as barriers to taking overnight UK trips in next 6 months

Focusing on costs related to overnight trips, 'cost of fuel' remains the top barrier to taking overnight UK trips in the next 6 months (48%), followed by 'cost of accommodation' (45%).

Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Percentage, August 2022, UK, Full list



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? July 2022 = 1759, August 2022 = 1759.

Cost of living crisis' impact on UK overnight trips - among next 6 months trip intenders

As a result of the 'cost of living crisis', 33% of UK adults say they will 'choose cheaper accommodation', 32% will 'look for more free things to do' and 31% expect to 'spend less on eating out'. Nearly a quarter (24%) say it would have no influence on their choice of destination, while 10% would not go on a break/holidays.

Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, August 2022, UK, Full list



Cost of living crisis' impact on day trips within the next few months

Focusing on day trips in the next few months, as a result of the 'cost of living crisis', 32% of UK adults say they will 'look for more 'free' things to do' on their day trips. 31% will 'take fewer day trips and 29% will 'spend less on eating out'. 15% will not go on day trips. However, 29% say it would have no influence on their day trips at all.

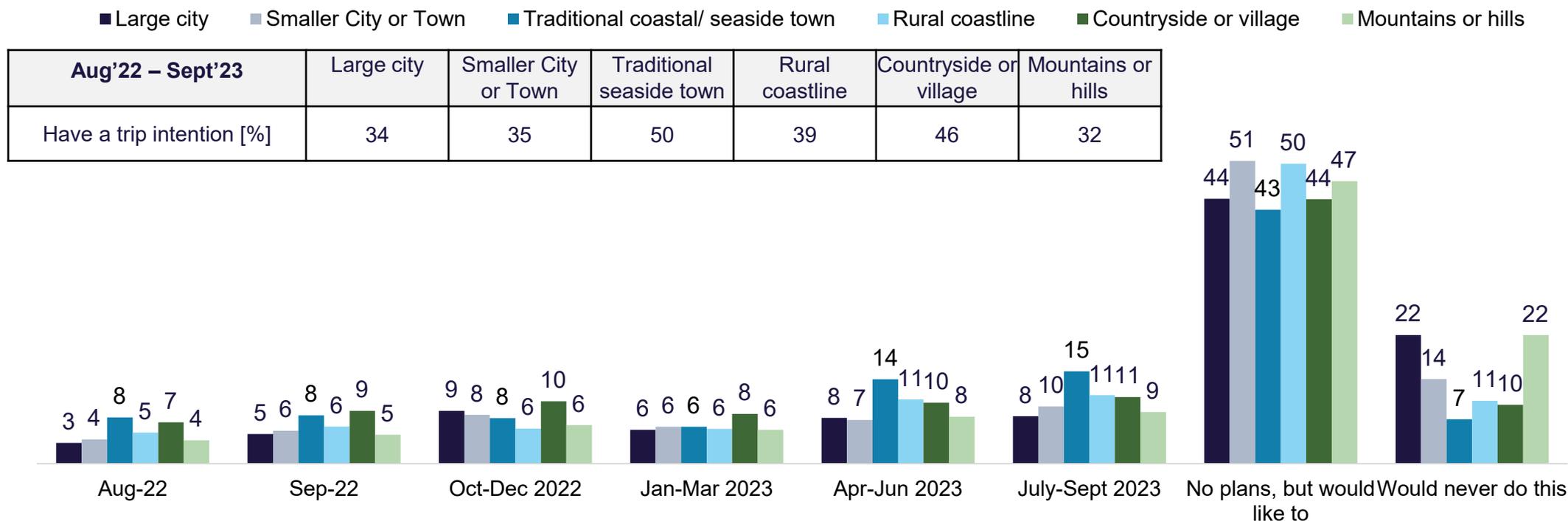
Figure 13b. 'Cost of living' impact on day trips, Percentage, August 2022, UK, Full list



All potential UK overnight trips intentions by destination

The top two destinations for overnight domestic trip in August – September are ‘traditional coastal/seaside towns’ and ‘countryside or village’, while during autumn and winter the lead destination is ‘countryside or village’.

Figure 14. Overnight trips intentions in next year by destination type, Percentage, August 2022, UK





VisitBritain™



VisitEngland™

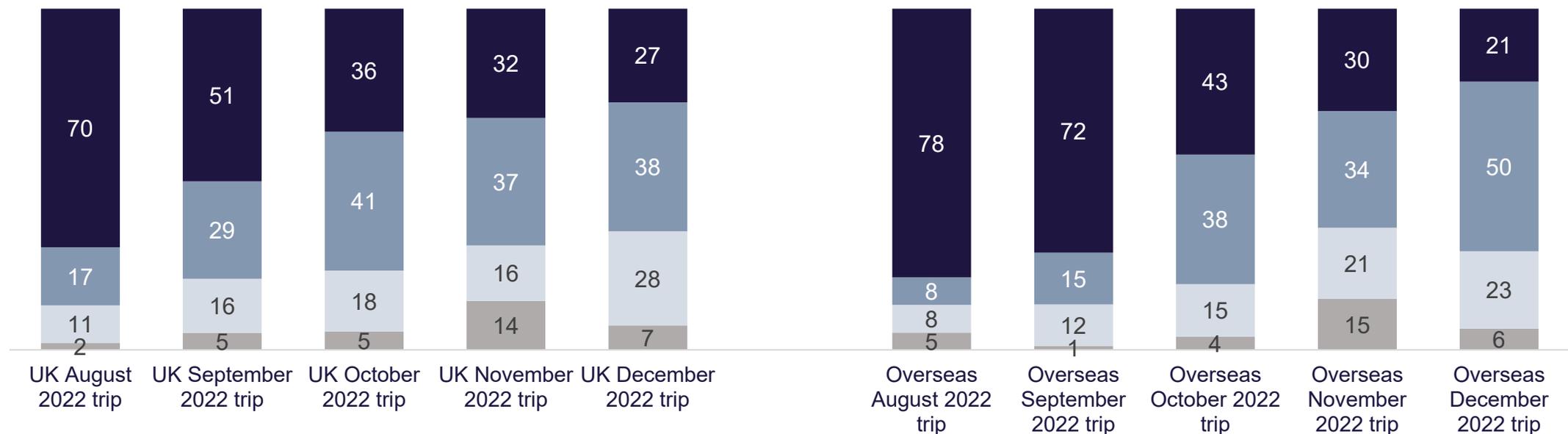
3. The Next Trip: Overnight and Day Trips

Planning and booking for next intended overnight trips in the UK / overseas

The majority of intenders have already booked their overseas (78%) trips in August. For UK trips, 70% have already booked their August trip, with 17% decided but yet to book.

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, August 2022, 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

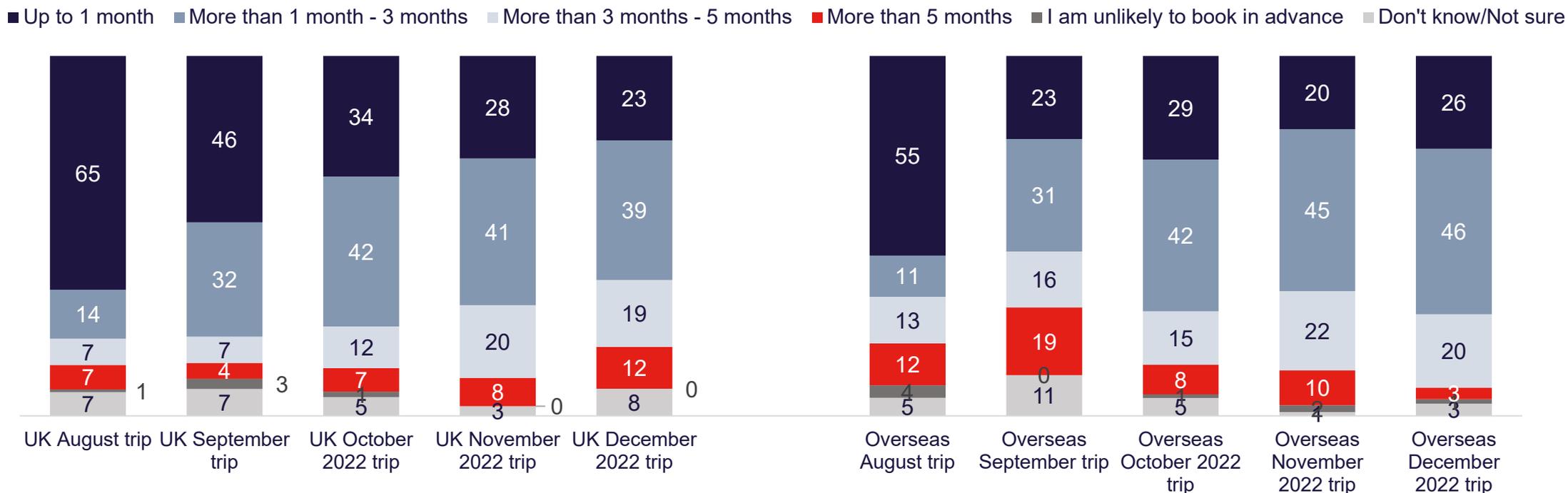


VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: August trip n=262, September trip n = 229, October trip n = 163, November 2022 n = 65, December 2022 n = 90. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: August trip n = 102, September trip n = 110, October trip n = 106, November 2022 n = 65, December 2022 n = 82.

Lead time from booking till first day of that trip

There is a shorter lead time between booking and going on September UK overnight trips, compared to trips in October till December. 65% booking their August trip within 1 month of going on the trip. Overseas trips tend to be booked more ahead than domestic trips, especially September overseas trips (potentially due to a different traveller's profile and booking patterns).

Figure 16. Time between booking the next UK and overseas overnight trip and first day of that trip, Percentage, August 2022, UK

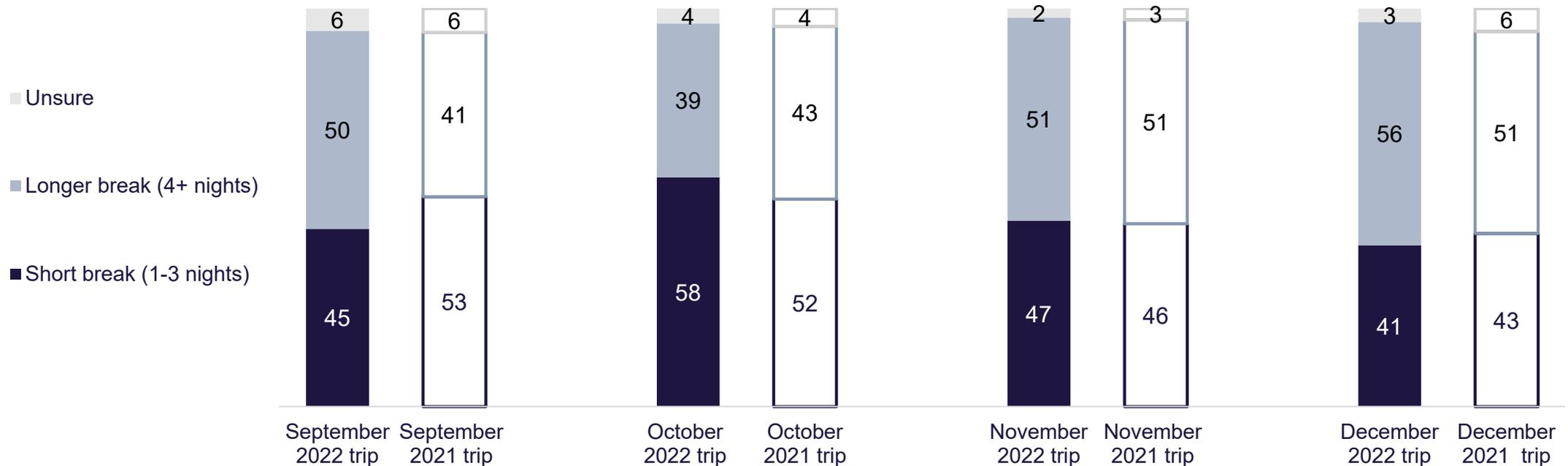


VB2f. Roughly how much time is there likely to be between you booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)> and the first day of your trip? UK trip: August trip n = 262, September trip n = 229, October trip n = 163, November 2022 n = 65, December 2022 n = 90 VB2h. Roughly how much time is there likely to be between you booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? August trip n = 102, September trip n = 110, October trip n = 106, November 2022 n = 65, December 2022 n = 82.

Duration of the next overnight trip in UK

Comparing last year and this year data, for September trips there is a clear increase of longer stays of 4 or more nights, from 41% last year to 50% this year. In October, a majority look set to take shorter breaks (58%).

Figure 17. Length of next UK holiday or short break by time period, Percentage, August 2022, UK



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

Base: All August 2022 respondents intending to take next holiday or short break in each time period: UK trip 2022: September trip n = 229, October trip n = 163, November trip n = 65, December trip n = 90; UK trip 2021: September trip n = 192, October trip n = 150, November trip n = 61, December trip n = 63

Where planning on staying on the next overnight trip in the UK

The South West is the most preferred UK overnight destination for trips between August and September 2022 (19% of intenders planning a trip there), and it remains the top destination between October to December 2022 (16% intending to take a trip there).

Figure 18. Where planning on staying on next UK overnight trip in August to September 2022, Percentage, July and August 2022, UK

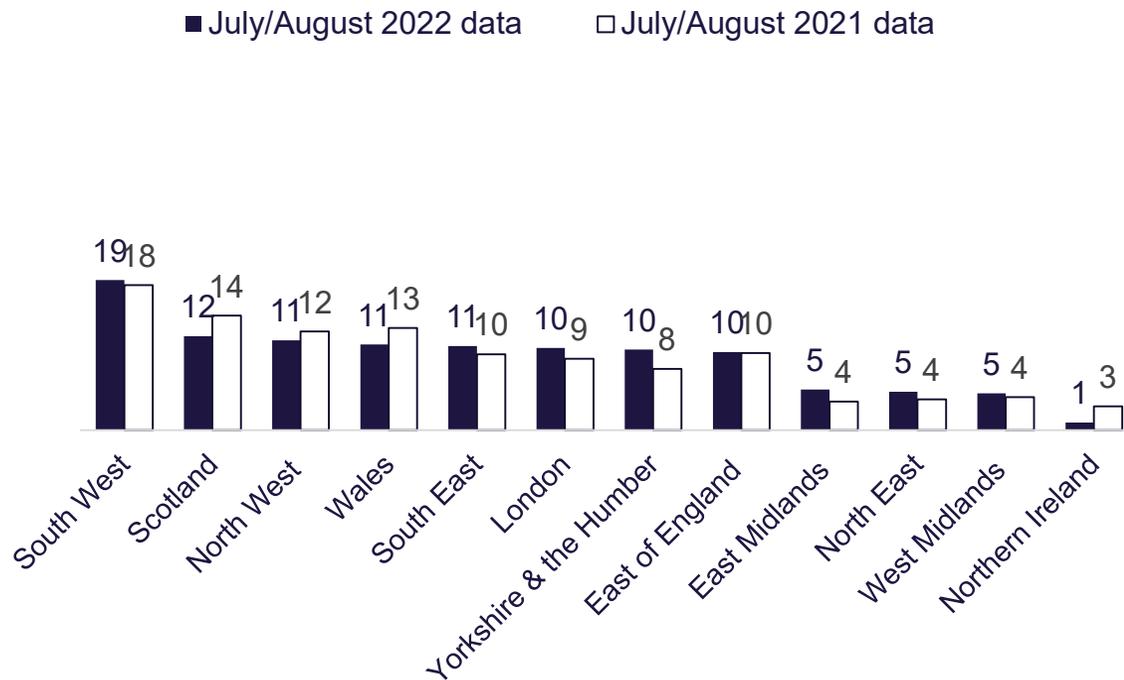
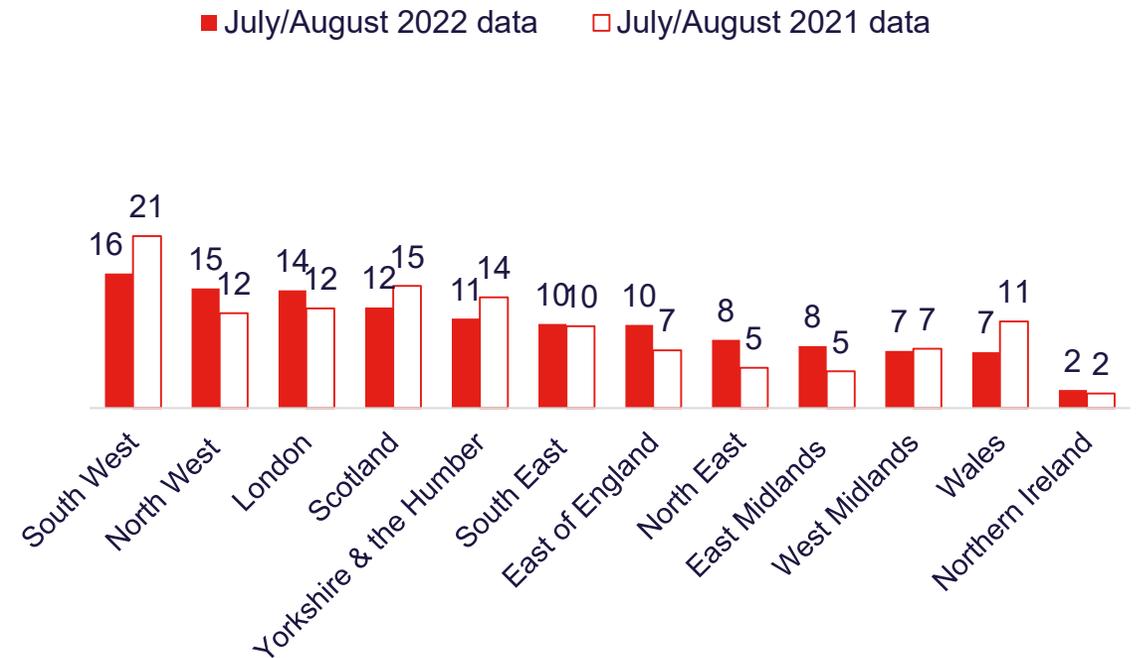


Figure 19. Where planning on staying on next UK overnight trip in October to December 2022, Percentage, July and August 2022, UK



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

Base: All July and August respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 988, October to December 2022 n = 599; August to September 2021 n = 703, October to December 2021 n = 509. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Main mode of transport for the next overnight trip in the UK

62% are intending to go on their August-September trip by their own car, while only 49% are planning to do so for their October – December trip. UK adults are slightly more likely intending to use a train for their autumn trips than for their summer trips.

Figure 20. Top 5 main modes of travel to destination for trip in August to September 2022, Percentage, July and August 2022, UK

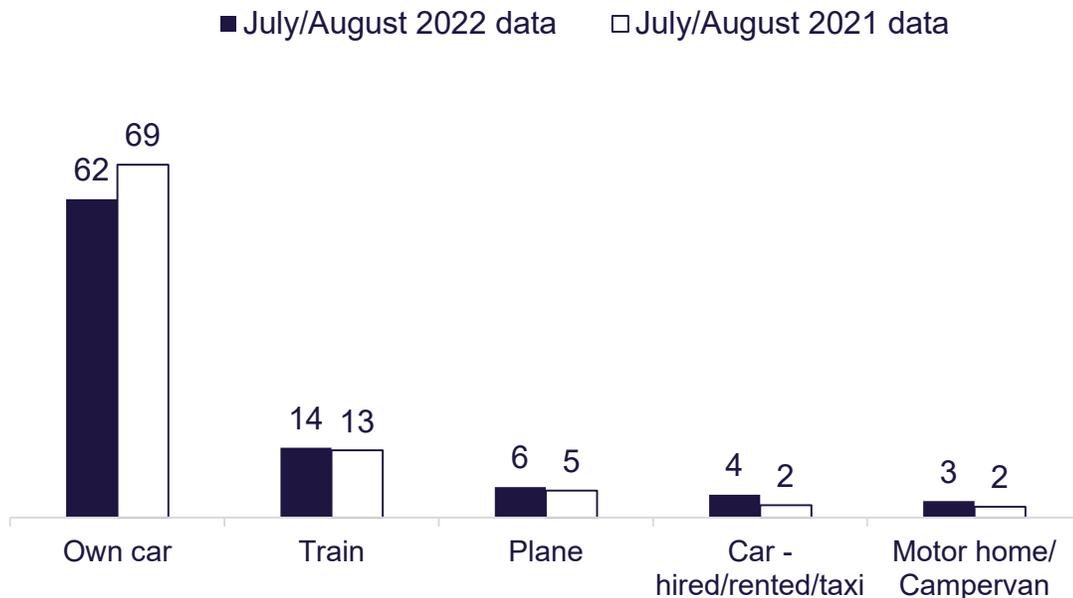
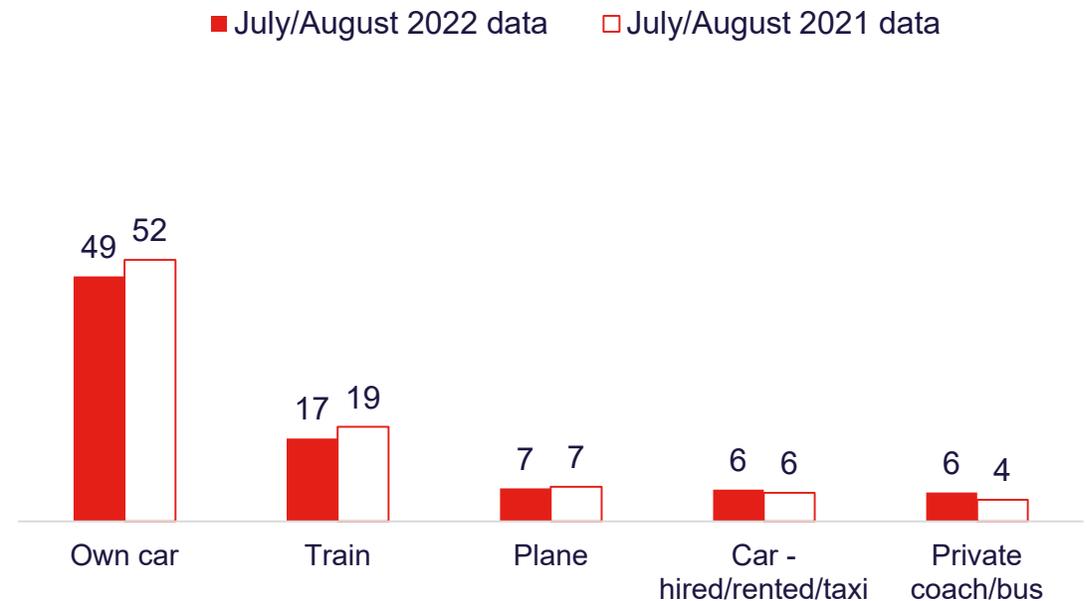


Figure 21. Top 5 main modes of travel to destination for trip in October to December 2022, Percentage, July and August 2022, UK



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

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?

Base: All July and August respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 988, October to December 2022 n = 599;

August to September 2021 n = 703, October to December 2021 n = 509

Accommodation type for the next overnight trip in the UK

For the next overnight trip in both time periods, 'hotel / motel / inn' is the leading accommodation type, followed by 'staying in a rented house or similar'.

Figure 22. Top 10 accommodation types planning on staying in on next UK overnight trip in August to September 2022, Net Percentage, July and August 2022, UK

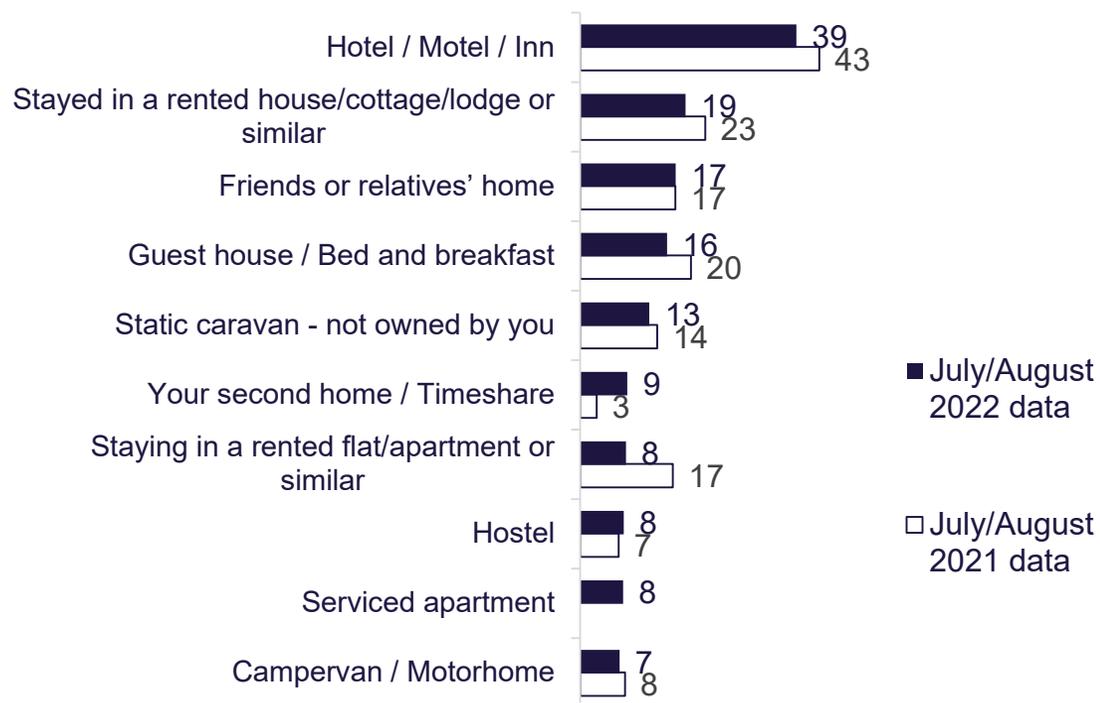
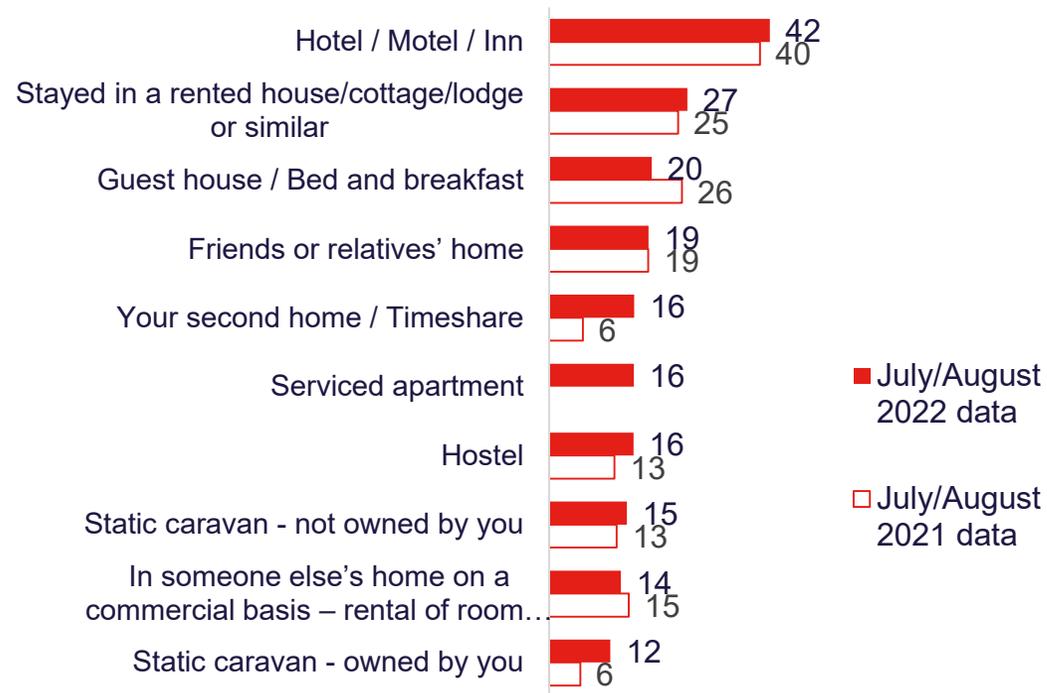


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in October – December 2022, Net Percentage, July and August 2022, UK



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

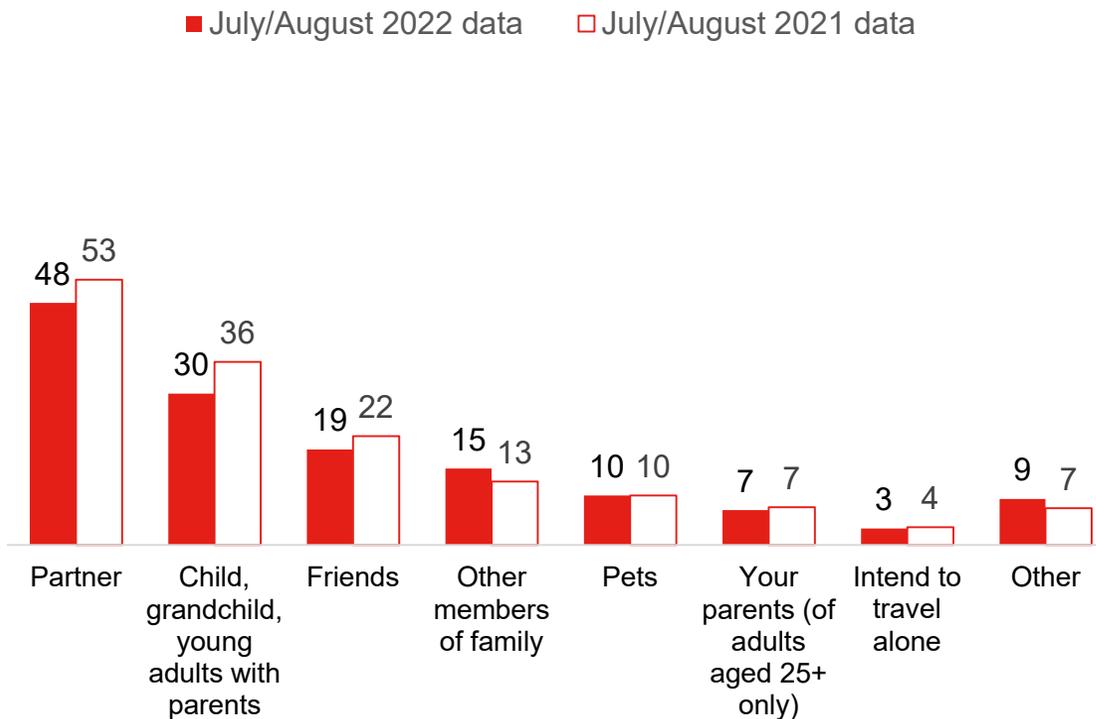
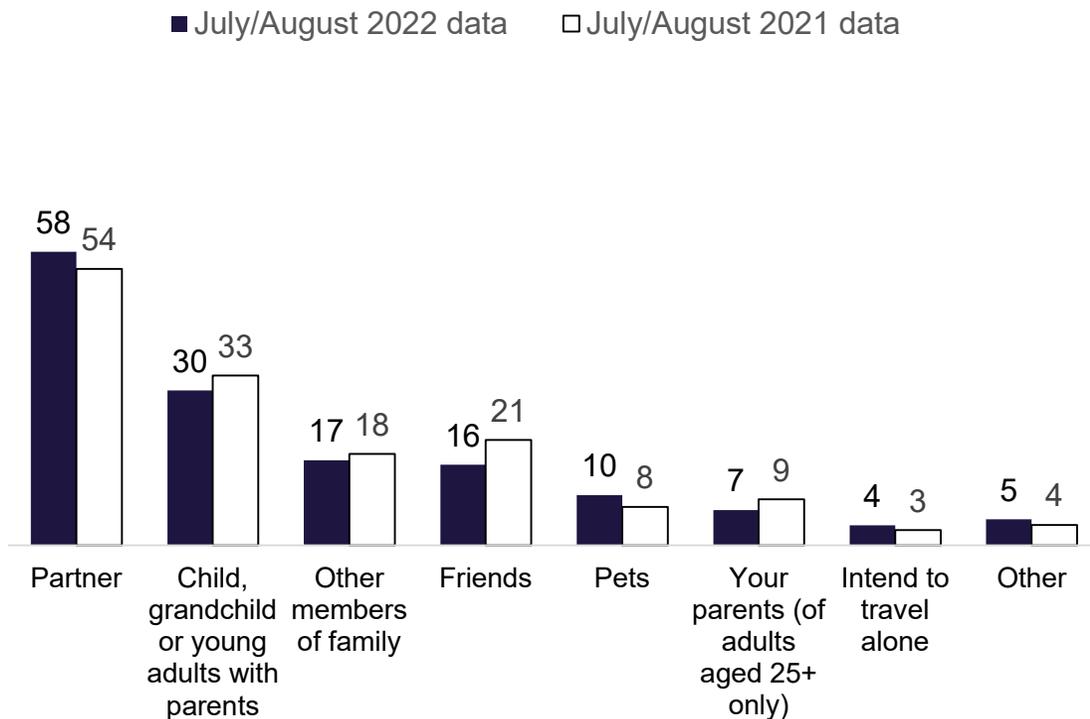
Base: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in? Base: All July and August respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 988, October to December 2022 n = 599; August to September 2021 n = 703, October to December 2021 n = 509 See tables for full breakdown.

Visitor party make-up for the next overnight trip in the UK

‘Partner’ is the most common visitor party member, followed by ‘child, grandchild or young adult with parents’.

Figure 24. Visitor party make-up for trips taken from August to September 2022, Percentage, July and August 2022, UK

Figure 25. Visitor party make-up for trips taken from October – December 2022, Percentage, July and August 2022, UK



QVB4d. With whom are you likely to be spending your holiday?

Base: All July and August respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 988, October to December 2022 n = 599; August to September 2021 n = 703, October to December 2021 n = 509 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

Motivations for the next overnight trip in the UK

Both time periods share the same top two reasons for going on the next overnight trip – ‘family time or time with my partner’, which is viewed as most important for trips in the August to September 2022, and ‘to get away from it all and have a rest’, which is the top motivation for trips in October to December 2022.

Figure 26. Motivations for UK holidays and short breaks in August to September 2022, Percentage, August 2022, UK, Full list



Figure 27. Motivations for UK holidays and short breaks in October – December 2022, Percentage, August 2022, UK, Full list



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

Base: All August respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 491, October to December 2022 n = 318.

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

Activities for the next overnight trip in the UK

The top two intended activities and set out apart from the remaining activities for both time periods are ‘trying local food and drink’ and ‘walking, hiking’.

Figure 28. Activities for UK holidays and short breaks, in August to September 2022, Percentage, August 2022, UK, Full list



Figure 29. Activities for UK holidays and short breaks, in October – December 2022, Percentage, August 2022, UK, Full list

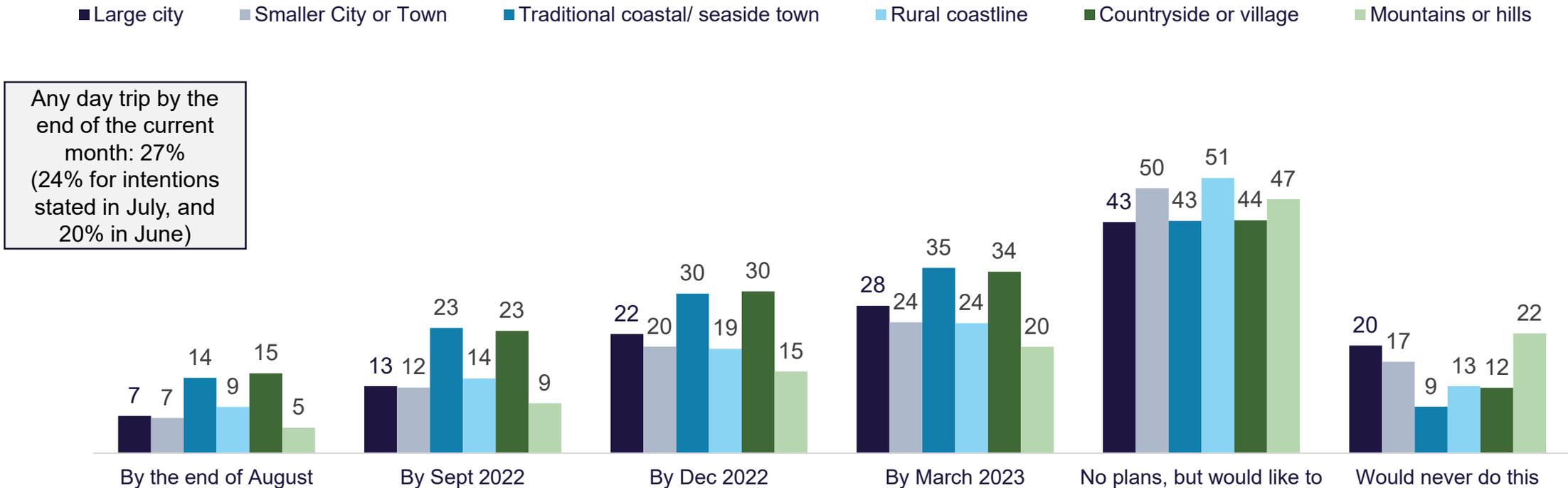


VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>? Base: All July respondents planning on taking a holiday or short break in the UK between August to September 2022 n = 491, October to December 2022 n = 318. Note: Multiple choice question. Totals may exceed 100%.

The next UK day trip intentions by destination type

27% of UK adults intend to take any type of day trip by the end of August, up on figures reported in the last two months. 'Countryside or village' and 'traditional coastal/seaside town' are the top two destination types for a day trip.

Figure 30. Next UK day trip intention between August 2022 and March 2023, Cumulative percentages, August 2022, UK





VisitBritain™



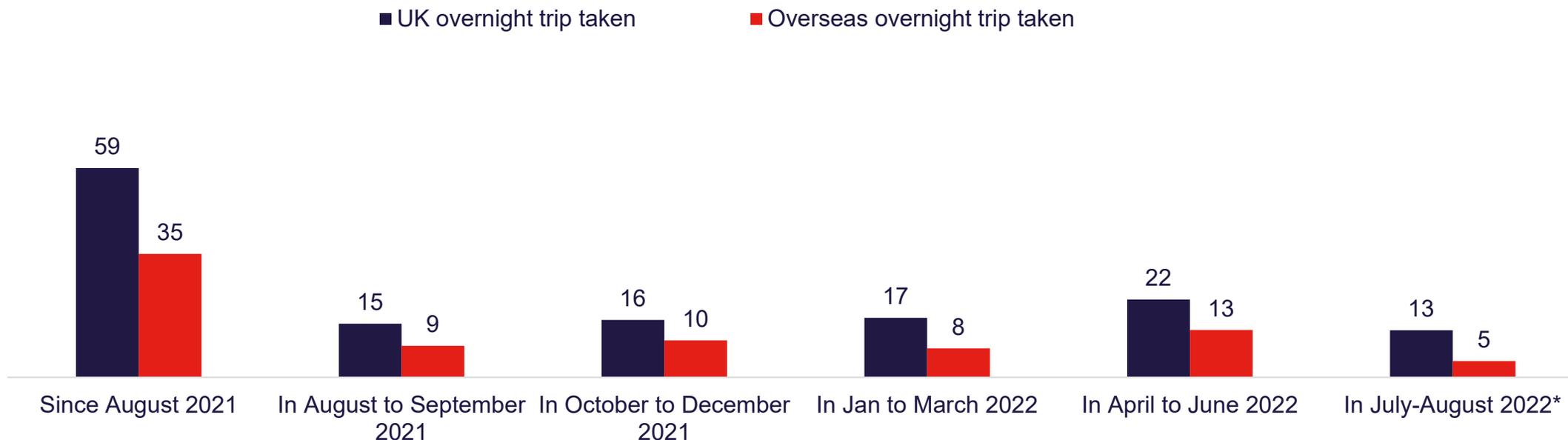
VisitEngland™

4. Past UK and Overseas Trips

UK and overseas trips taken in last 12 months

Nearly 6 in 10 (59%) UK adults have taken a UK overnight trip since August 2021, almost twice as many as have taken an overseas overnight trip in that period (35%). The most popular time periods in the past 12 months were April to June 2022.

Figure 31. Proportion taken an overnight UK or overseas trip in below time period, Percentage, August 2022, UK



VB13a/v. 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. August 2022= 1,759 *July-August 2022 accounts for July and the first week of August when fieldwork took place
 Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

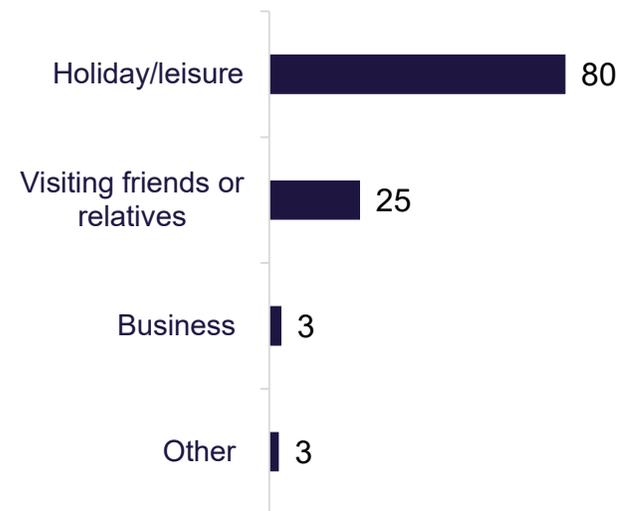
Destination region and purpose of last UK overnight trip in the past 3 months

The South West of England was the most popular destination region for trips in the past three months, 20% of trip takers having stayed there, with little disparity between the destination choice after this. Holiday / leisure was the most dominant purpose for overnight UK trips (80% having taken trips for this reason).

Figure 32. Destination of overnight trips taken in UK in the past three months, Percentage, August 2022, UK



Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, August 2022, UK



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 August respondents that took an overnight trips in the last three months n=373

Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose



VisitBritain



VisitEngland

5. Overnight Business Trip Intentions (July 2022 data *)



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

Intentions for overnight business trips in the next three months (latest available data)

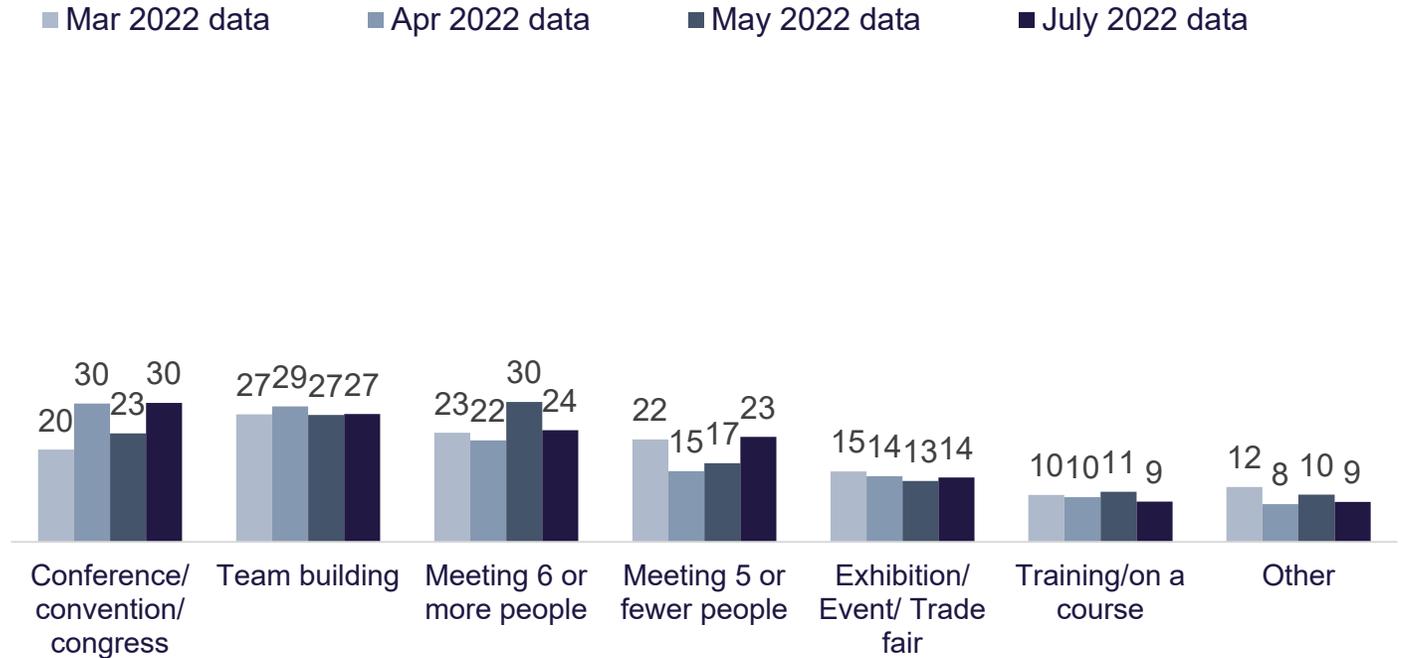
19% of UK adults in employment plan on taking an overnight business trip in the next 3 months (slightly higher than the previous 4 waves). 'Conference / convention / congress' is the leading reason for taking one (at 30%), followed by 'team building' (at 27%)

Figure 34. Proportion anticipating an overnight business trip in next 3 months, Percentage, July 2022, UK adults in employment

81% of UK adults interviewed are in employment



Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, July 2022, UK adults in employment planning a trip



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: July 2022 respondents currently in employment n = 1,333. All taking a business trip n=301



VisitBritain™



VisitEngland™

Methodology & Further Data

Methodology

- This report presents findings from the August 2022 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 5th phase of this project started in June 2022 and will run until March 2023.
- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis’ impact on trips intentions, in addition to continued tracking of Covid-19 impact. It now 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 5th phase and the previous phases / waves.
- This affects for example sl. 11 Trips Intentions by month – to make space for new, more topical questions, this question was simplified, and this small structural change means that we cannot compare the 5th phase data vs previous months.

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 pre-pandemic
 - VB5b. Reasons for not planning to stay in a large city during your next UK holiday or short break
 - VB9a/b. Intention to visit leisure places in the UK in the next 12 months/ in the next month
 - VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons?
 - VB10a/b. Intention to conduct leisure activities in the UK in the next 12 months/ in the next month
 - VB10c. Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons?
 - Q63. Conditions essential for indoor tourism and leisure providers to have in place for you to visit/use them over the next 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.

