Domestic Sentiment Tracker: November 2022

Published: November 2022

Fieldwork Period: 1st – 7th November 2022

UK Results

Contents

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 November 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.

- **November to December 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between November and December 2022
- **January to March 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January and March 2023

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

- **Pre-Nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older Independents:** Aged 35-64 without children in household
- **Retirees:** Aged 65+

November 2022: Scorecard of Key Metrics

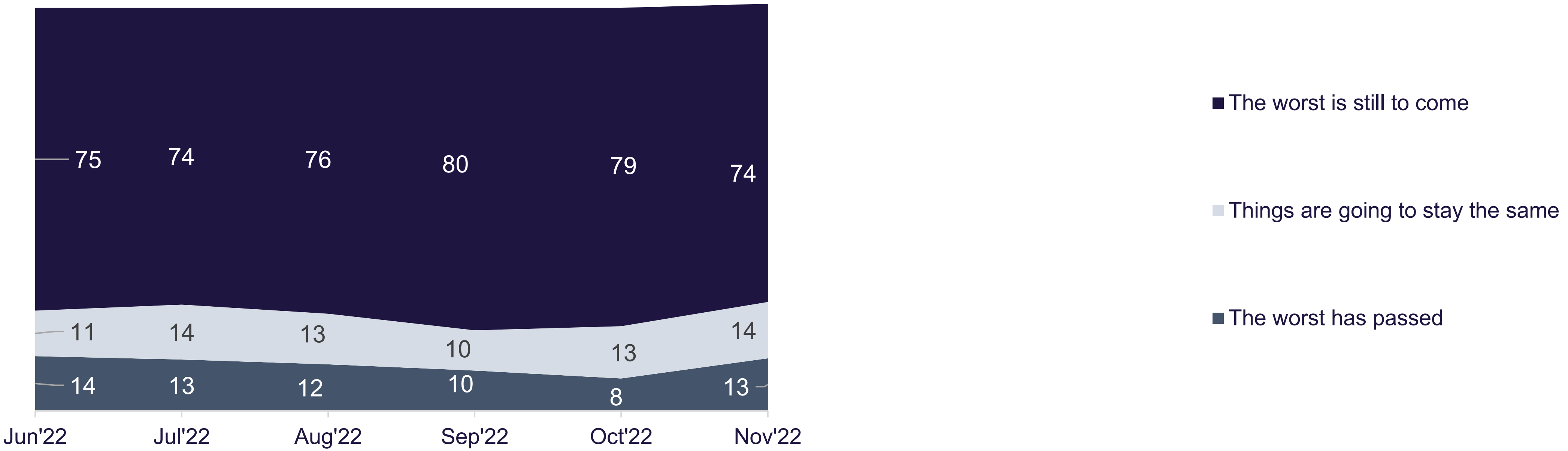
Key Metrics	November 2022	Change since October 2022
% of UK adults stating 'WORST IS STILL TO COME' in regard to cost of living crisis	74%	-5%*
Proportion intending a UK overnight trip at any point <u>in the next 12 months</u>	73%	+5%*
Proportion intending an overseas overnight trip <u>at any point in the next 12 months</u>	57%	+4%*
Preference for UK than overseas in the next 6 months (vs pre-pandemic)	34%	+2%
Took a domestic overnight trip in the past 12 months	73%	+5%*
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	4%	+6%*
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-17%	+5%*
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	36%	-4%*
Reduce the number of day trips due to cost of living crisis [NET 'fewer', 'not go on day trips']	44%	+2%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1st Rising cost of living; 2nd Personal finances; 3rd UK weather/Rising costs of holidays/leisure	Personal finances moves up to 2nd place, Rising costs of holidays/leisure moves to 3rd joint with UK weather

* Represents a statistically significant change on previous wave

1. Current General Sentiment

In November, the perceptions of the cost of living crisis have improved, with currently 3 in 4 (74%) of UK adults thinking ‘the worst is still to come’.

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



22nd Jun: UK inflation rose to 40-year high of 9.1%

20th Jul: Fuel, milk and eggs steepest increases in 40 years

17th Aug: UK inflation up to 10.1%, shoppers feel the inflation hit

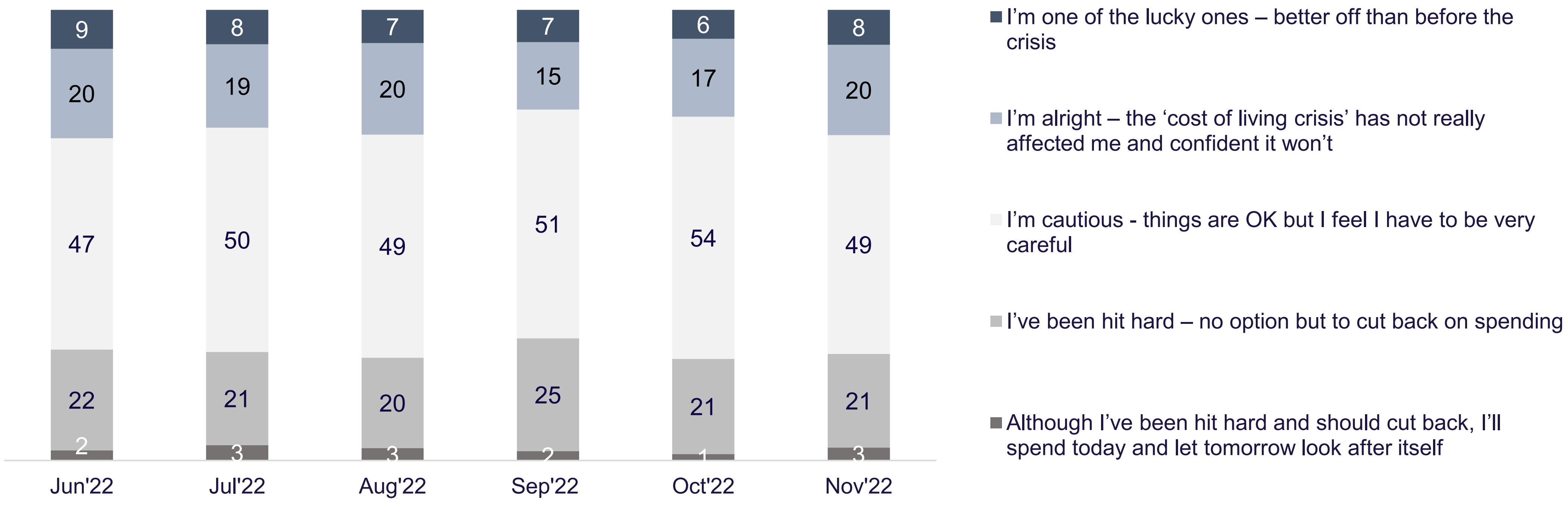
14th Sep: UK inflation eases to 9.9% but remains close to 40-year high

19th Oct: UK inflation hits 10.1%; 20th Oct – Liz Truss resigns; 25th Oct: Rishi Sunak becomes UK’s new prime minister

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. November 2022 = 1,776

The majority of UK adults are either ‘cautious – being very careful’ or have already been ‘hit hard’ by the cost of living crisis.

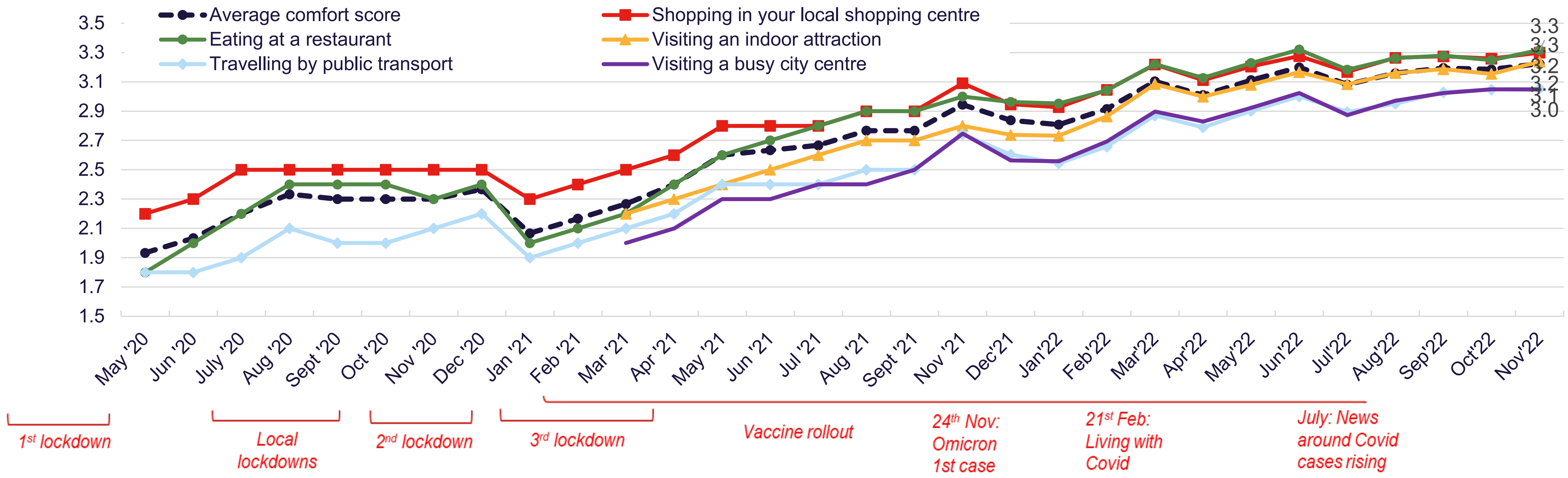
Figure 2. Feelings about situation during the ‘cost of living crisis’, Percentage, UK



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. November 2022 = 1,776

Comfort with everyday activities seems to have stabilized. In November, the 'average comfort score' was at 3.2, which is in line with the last 3 months of data.

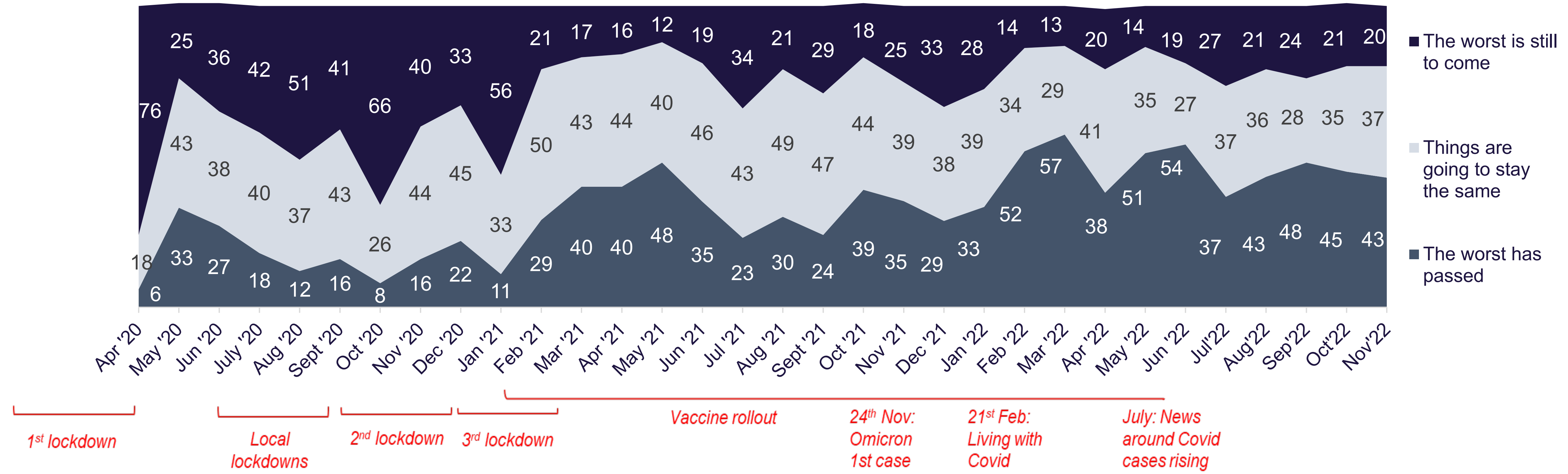
Figure 3. Level of comfort conducting a range of activities separately and combined, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, UK



Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. November 2022 = 1,776 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 Covid situation have also stabilized; 43% now think that ‘the worst has passed’, a further 37% believe ‘things are going to stay the same’.

Figure 4. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK

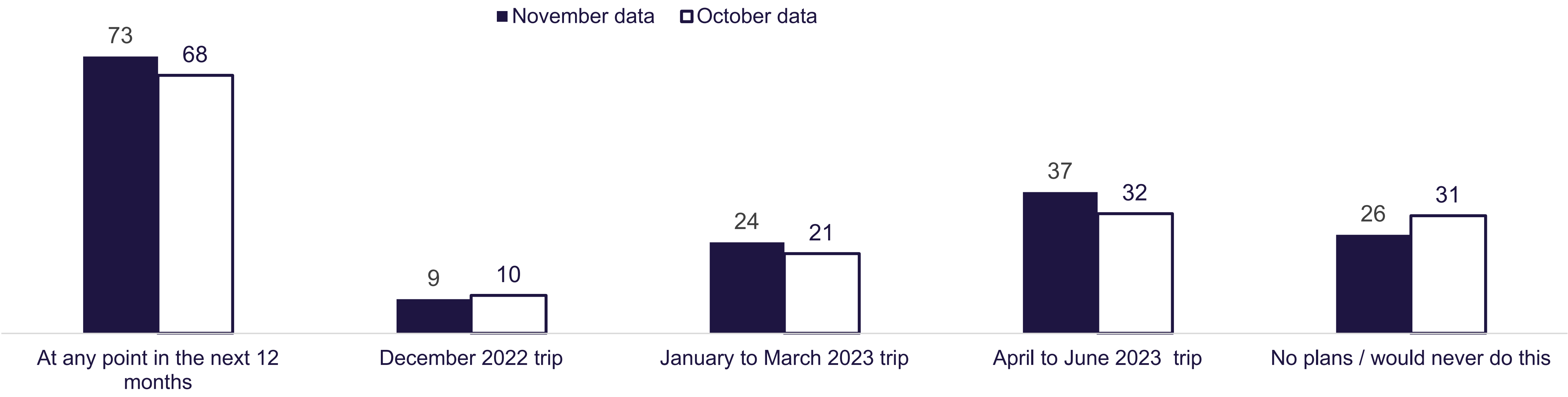


Question: Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. November 2022 = 1,776 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base 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.

2. Trip Intentions: UK and Overseas

73% of UK adults plan on taking an overnight domestic trip at some point in the next 12 months, which is higher than in October.

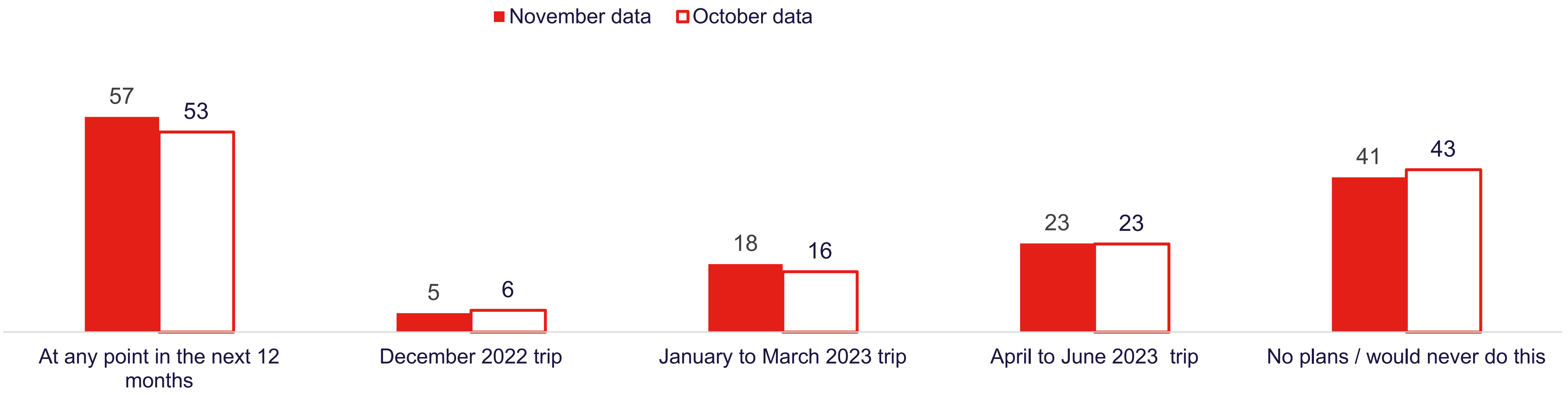
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, November 2022, UK



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. October 2022 = 1,756, November 2022 = 1,776. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Over half (57%) of UK adults are anticipating an overnight overseas trip at some point in the next 12 months, an increase on October intentions.

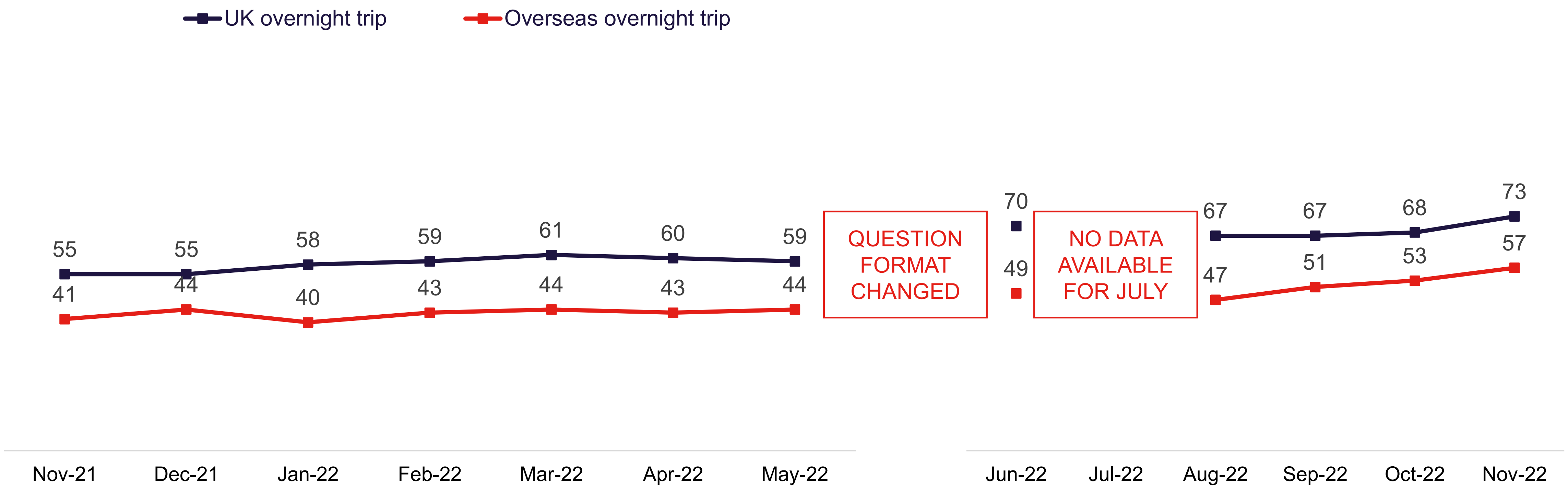
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, November 2022, UK



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. October 2022 = 1,756, November 2022 = 1,776. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

The proportion of those anticipating domestic and overseas trips are showing an upwards trend (steeper for overseas for recent months' intentions)

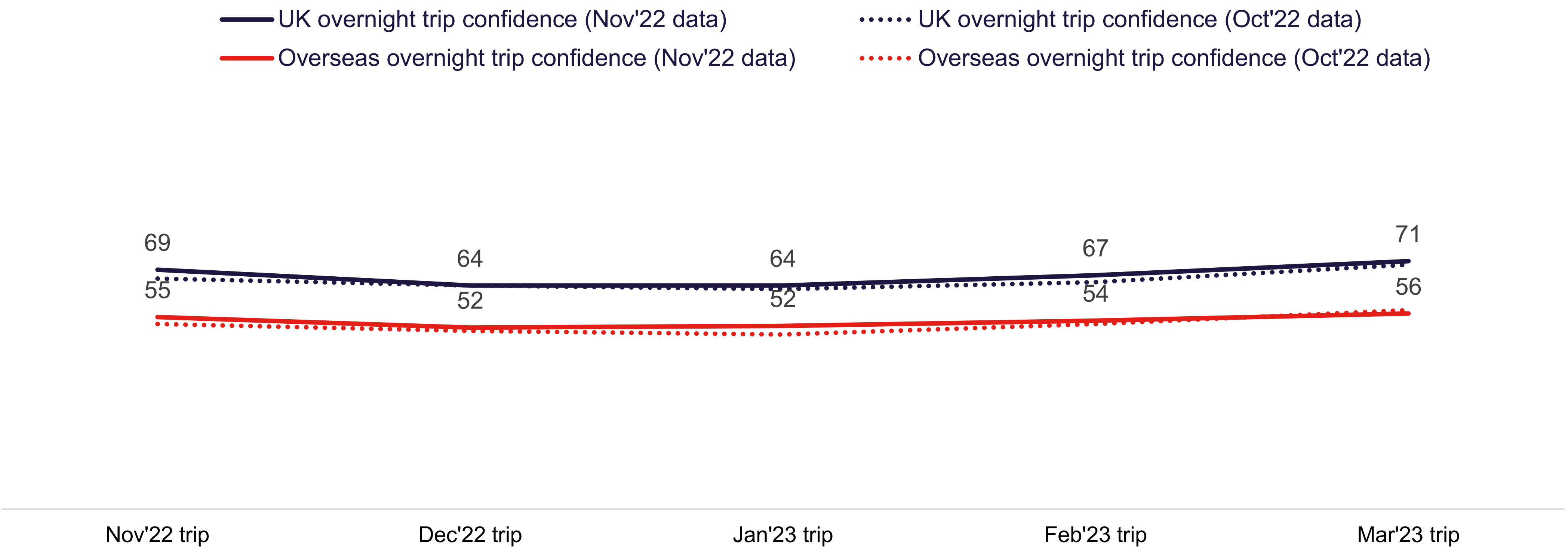
Figure 5c. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, November 2022, UK*



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. November 2022 = 1,776. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Confidence in the ability to take a trip over the coming months is higher for more immediate trips, then declines slightly for trips in December and January, and rises again in February and March.

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



Question: 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. October 2022 = 1,756 and November 2022 = 1,776.

The proportion of UK adults intending to take more domestic and overseas overnight trips in the next 12 months compared to pre-pandemic increased in November.

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

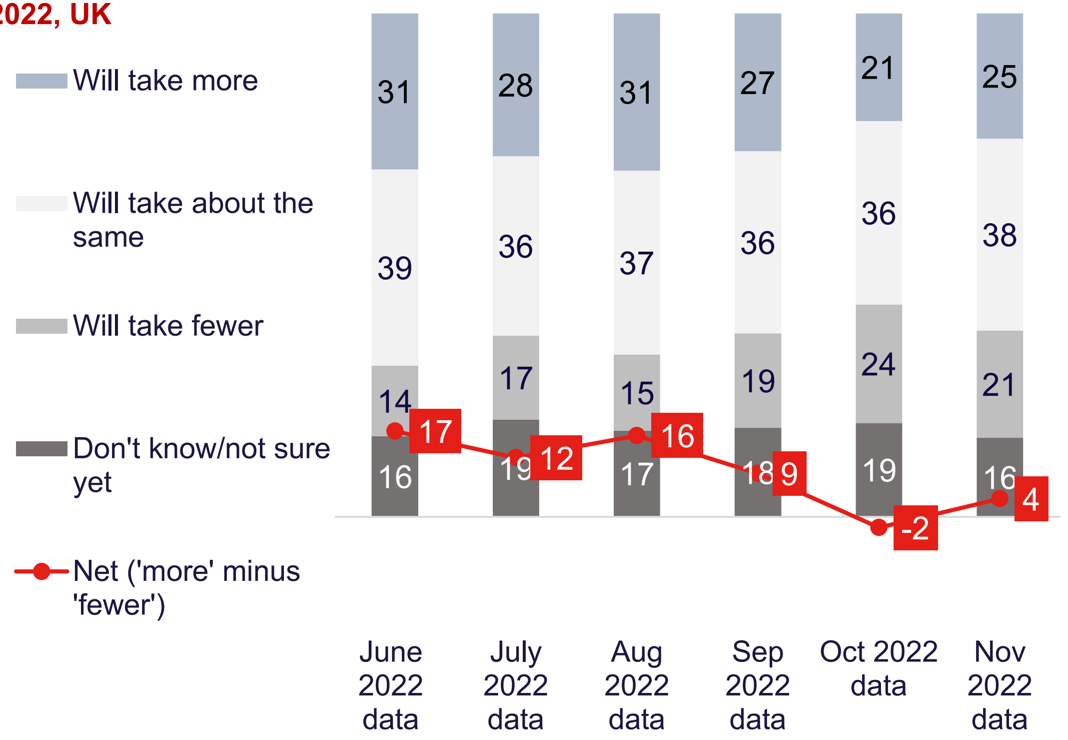
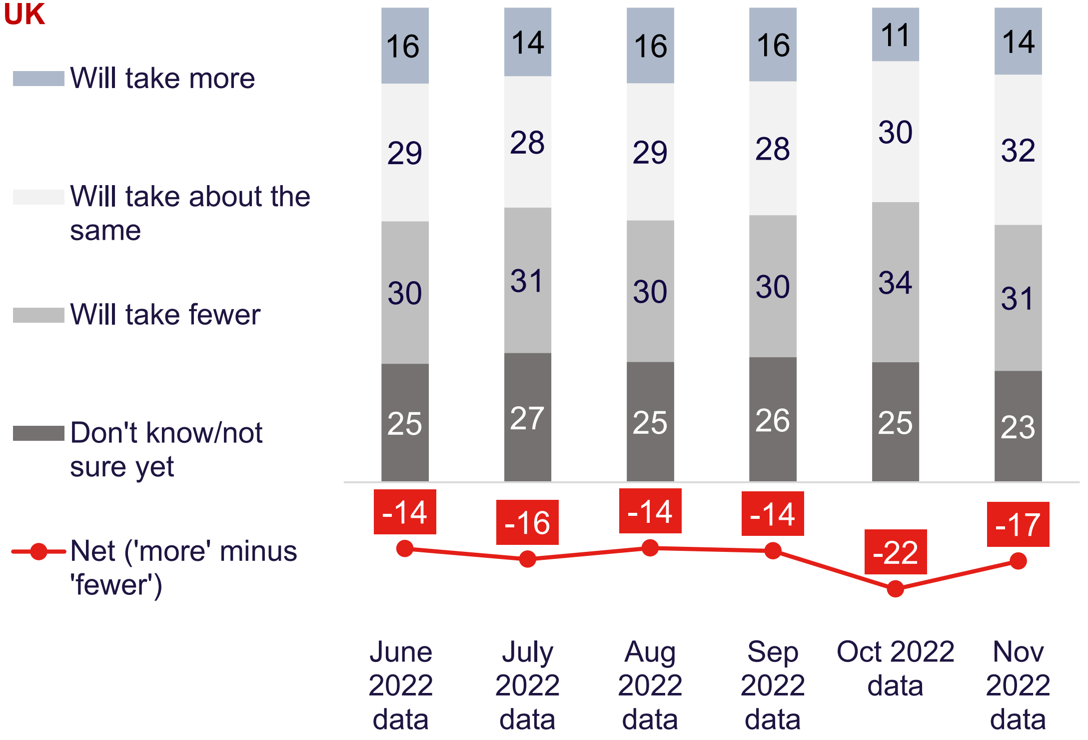


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, November 2022, UK



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 as you took before the COVID-19 pandemic? Base: All respondents. November 2022 = 1,776.

34% of respondents indicated they are more likely to choose a UK trip than an overseas trip, compared to pre-pandemic. The top reason for domestic preference is ‘UK holidays are easier to plan’ (63%).

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

TOP 5 reasons for UK preference

1. UK holidays are easier to plan (63%)
2. UK holidays are cheaper (51%)
3. Shorter / quicker travel (42%)
4. To avoid long queues at airports/cancelled flights (41%)
5. Uncertainty around restrictions at overseas destinations (35%)

TOP 5 reasons for Overseas preference

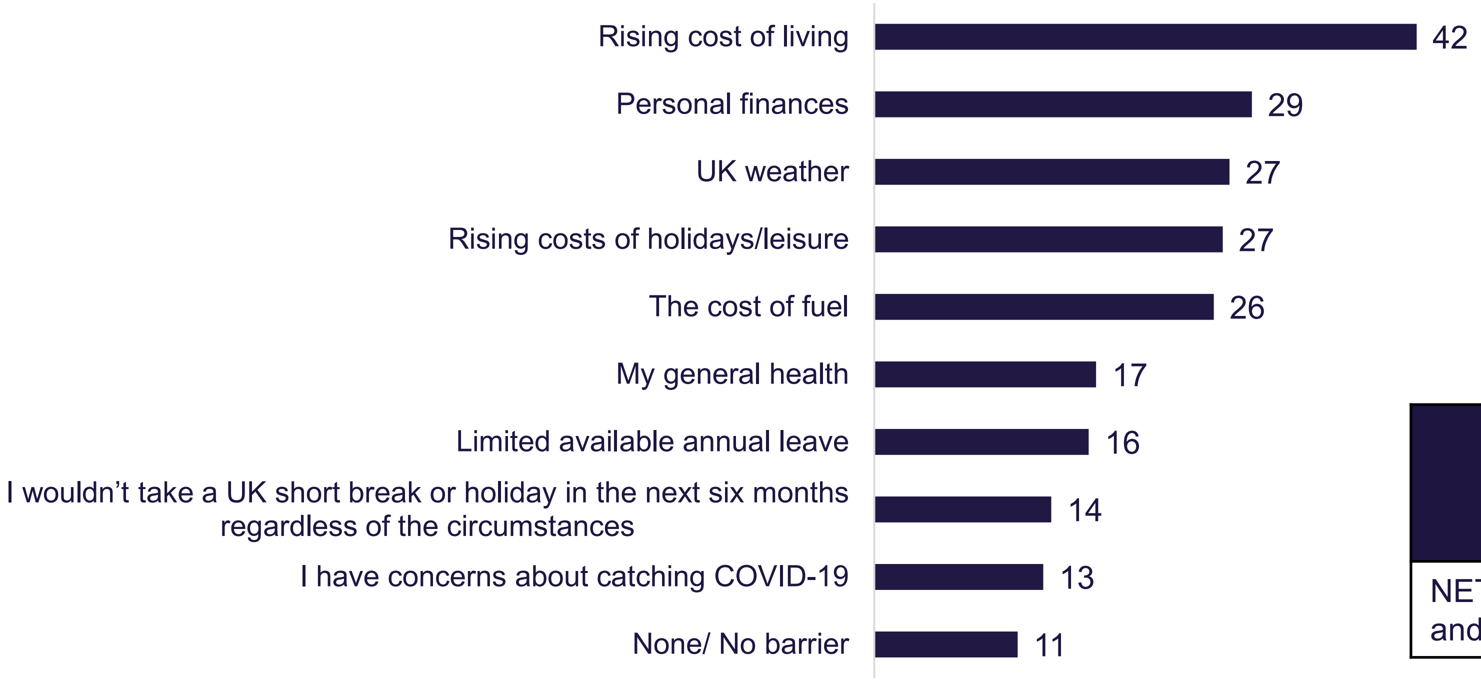
1. Better weather (40%)
2. I want to visit new places (33%)
3. I want to explore other cultures (27%)
4. I’m prioritising overseas trips after missing out during the pandemic (26%)
5. Overseas holidays are cheaper (25%)

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

Question: VB2j. Thinking of the next 6 months, how different do you think your short break/holiday choices will be compared to before the COVID-19 pandemic? Base: All respondents. November 2022 = 1,776. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? November 2022 = 590, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? November 2022 = 412

The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ (42% stating this) – indexing much higher than any other barriers.

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



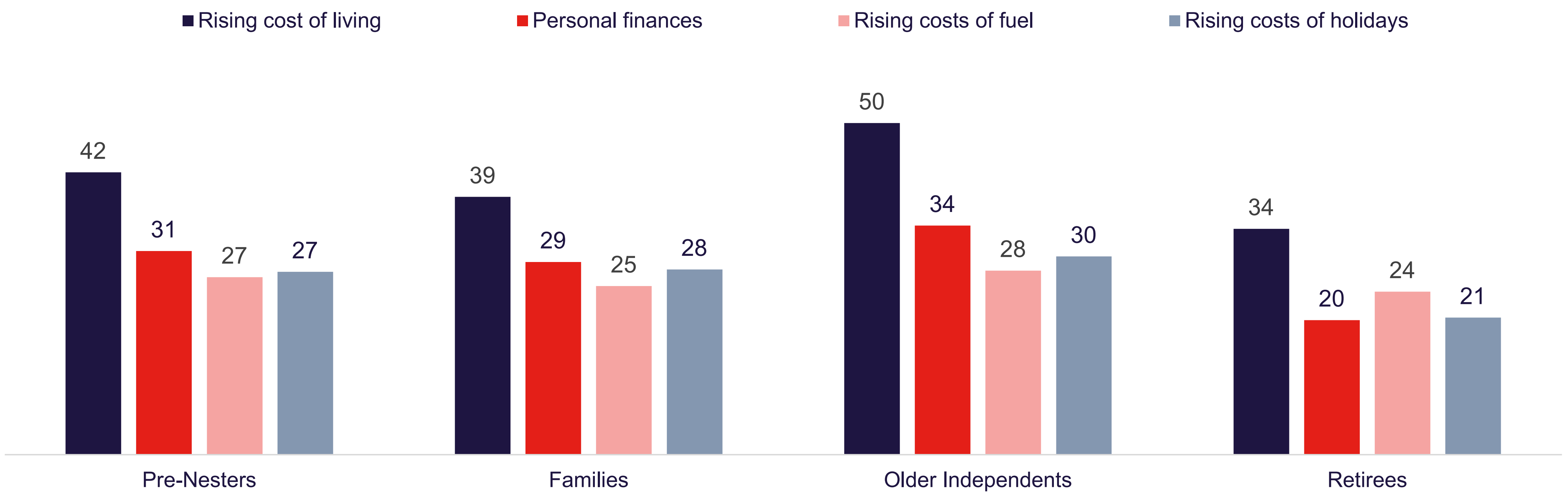
	September 2022 data	October 2022 data	November 2022 data
NET: Costs and finances	62%	62%	61%

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. November 2022 = 1,776. *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 top financial barrier across all life stages – most notably amongst Older Independents.

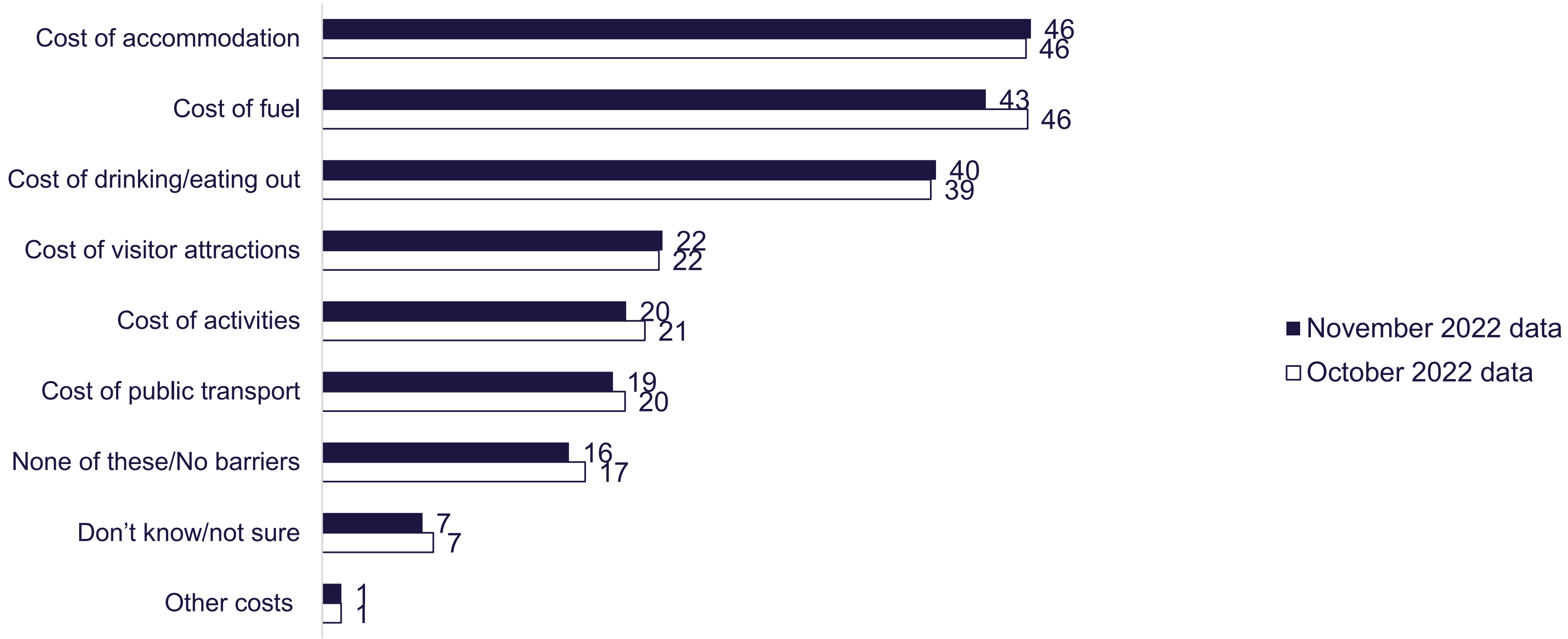
Figure 11. Perceived financial barriers as a potential barrier to taking an overnight trip in the UK in next 6 months, Percentage, November 2022, UK



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: November 2022 fieldwork period; Pre-Nesters (452), Families (626); Older Independents (417); Retirees (281)

Focusing on costs related to overnight trips, ‘cost of accommodation’ is the top barrier to taking overnight UK trips in the next 6 months (46%), followed by ‘cost of fuel’ (43%).

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



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: October 2022 = 1756 and November 2022 = 1776.

As a result of the cost of living crisis, 32% of UK adults said they will 'spend less on eating out' on their UK overnight trip, 32% will 'choose cheaper accommodation' and 31% will 'look for more free things to do'.

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

Reduce the number of UK overnight trips	September 2022 data	October 2022 data	November 2022 data
NET 'fewer', 'not go', 'go day trips instead'	40%	40%	36%

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: November 2022 = 1776.

In terms of UK day trips, 30% of UK adults say they will 'take fewer day trips', while 28% will 'spend less on eating out' and 28% will 'look for more 'free things to do'.

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

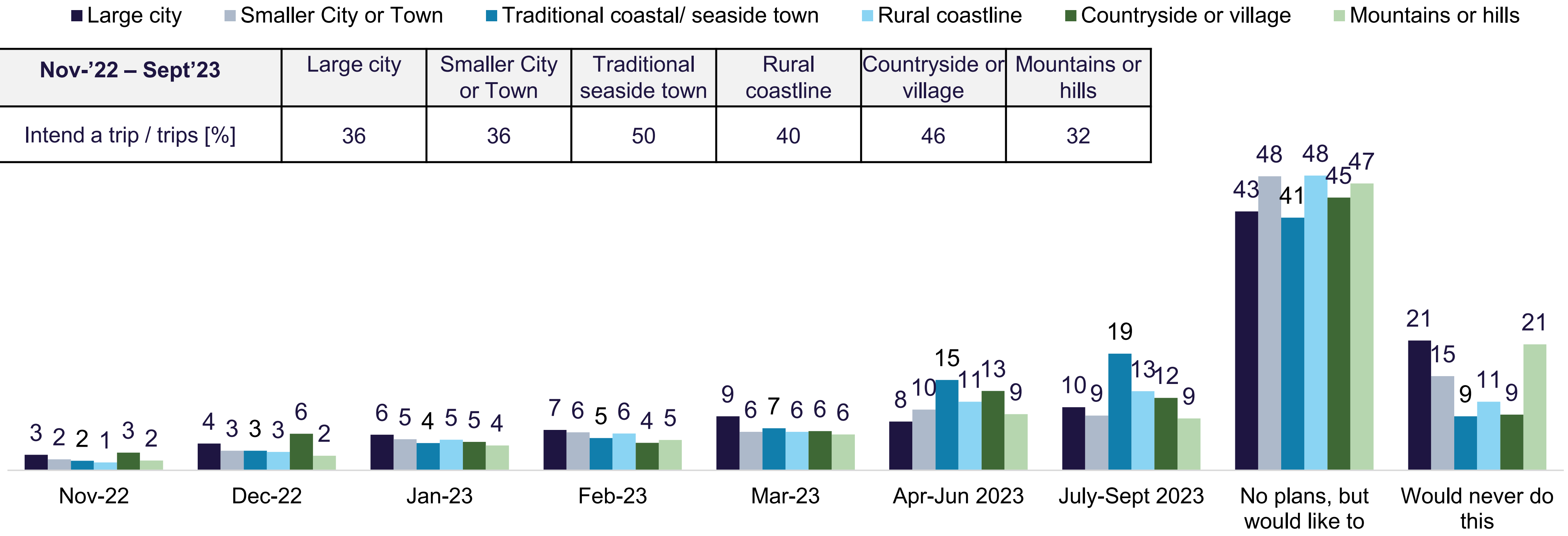
Reduce the number of day trips	September 2022 data	October 2022 data	November 2022 data
NET 'fewer', 'not go on day trips'	45%	42%	44%

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: November 2022 = 1776.

The top destination type for an overnight domestic trip in the coming months (November to December) is ‘countryside or village’. From January to March, it is ‘large city’, while from April to September it is ‘traditional coastal/seaside town’.

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

Nov-’22 – Sept’23	Large city	Smaller City or Town	Traditional seaside town	Rural coastline	Countryside or village	Mountains or hills
Intend a trip / trips [%]	36	36	50	40	46	32

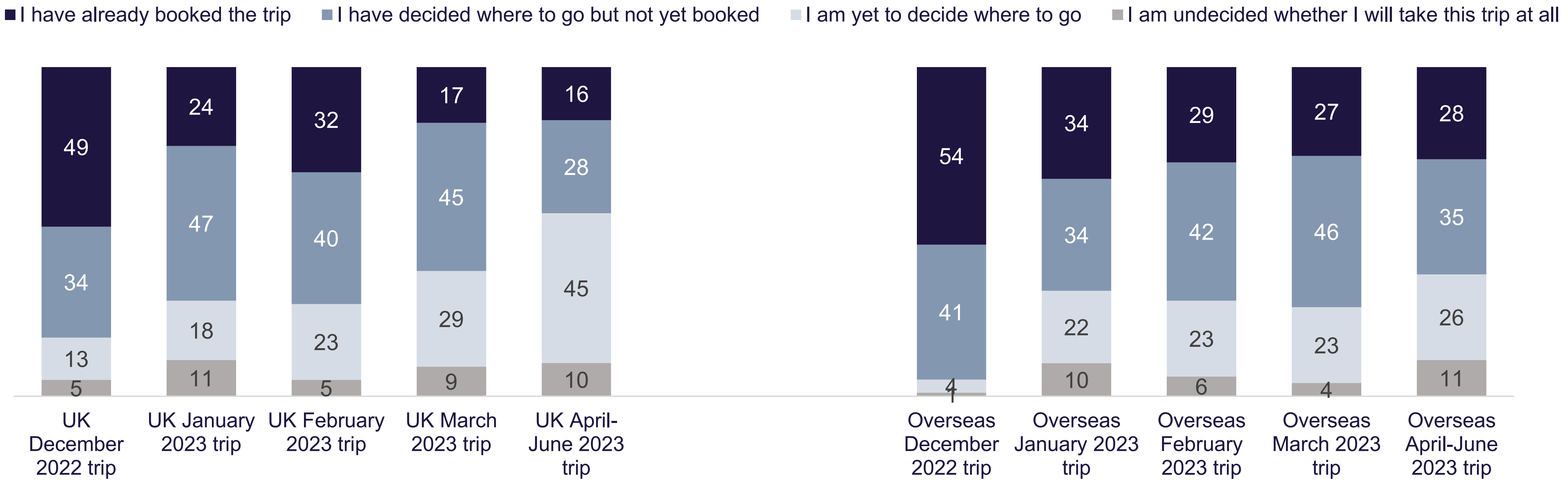


Question: VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Please select all possible occasions, not just the next one. Base: November 2022 = 1,776.

3. The Next Trip: Overnight and Day Trips

Over half (54%) of intenders have already booked their overseas trips in December. For UK trips, 49% have already booked their trip, with 34% decided but not yet booked.

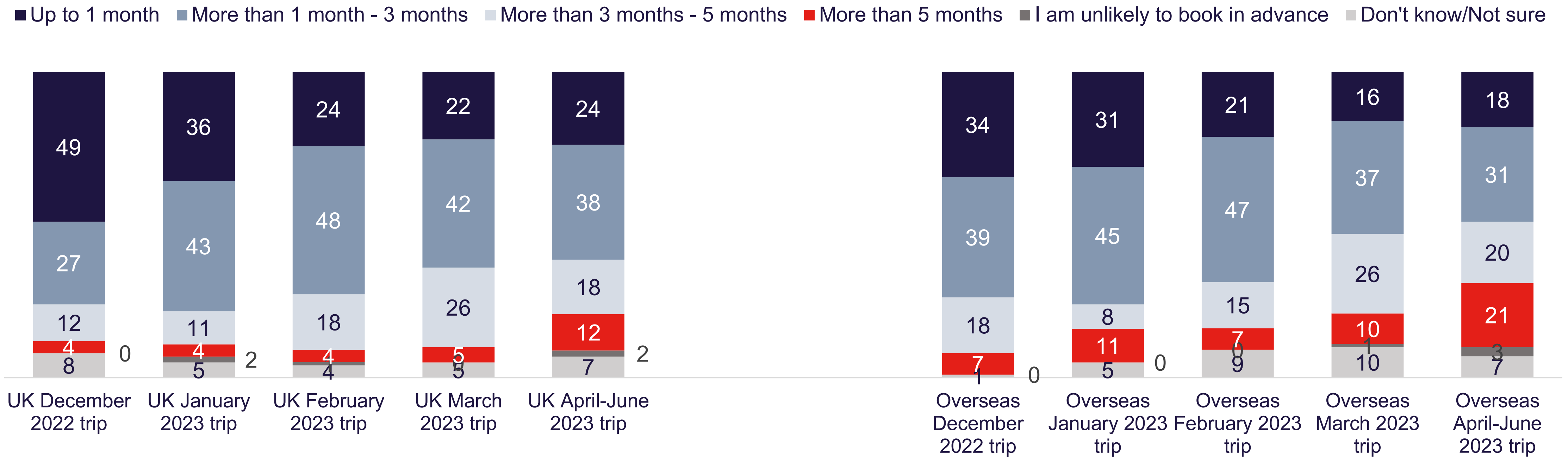
Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, November 2022, UK



Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: December 2022 n = 140, January 2023 n = 79, February 2023 n = 119, March 2023 n = 129, April-June 2023 n = 402. 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: December 2022 n = 72, January 2023 n = 55, February 2023 n = 104, March 2023 n = 98, April-June 2023 n = 272.

49% of UK adults will have booked their domestic December trip within 1 month of going on the trip, while overseas December trips are most likely booked 1-3 months ahead.

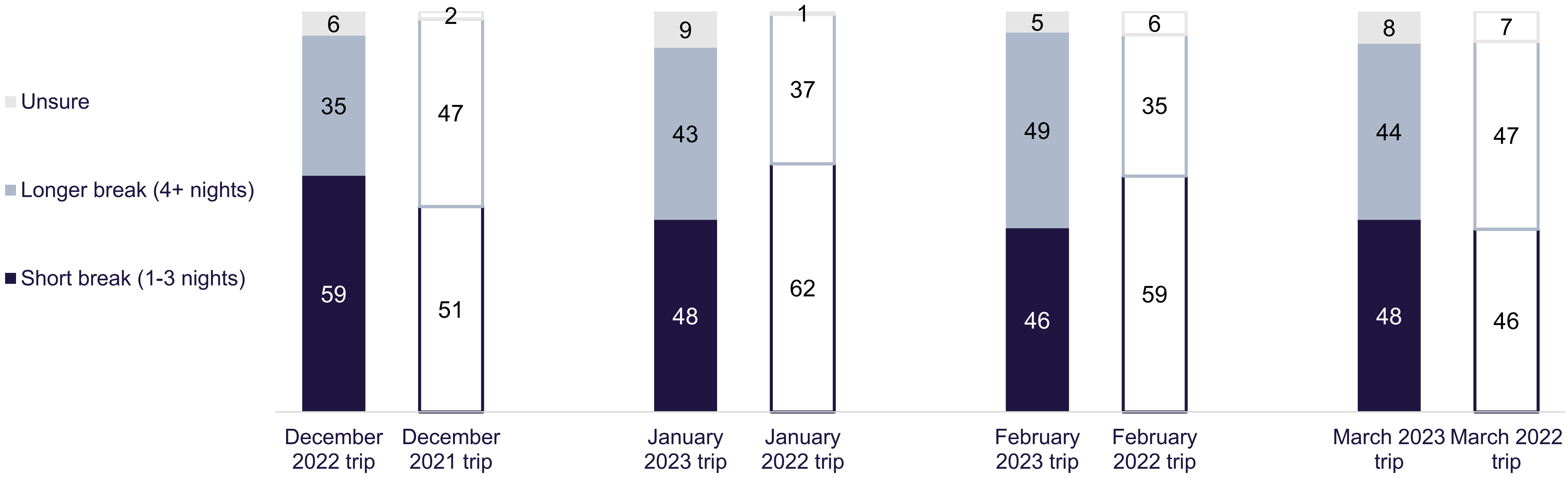
Figure 16. Time between booking the <u>next</u> UK and overseas overnight trip and first day of that trip, Percentage, November 2022, UK



Question: 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: : December 2022 n = 140, January 2023 n = 79, February 2023 n = 119, March 2023 n = 129, April-June 2023 n = 402. 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? Overseas trip December 2022 n = 72, January 2023 n = 55, February 2023 n = 104, March 2023 n = 98, April-June 2023 n = 272.

Short breaks are significantly more common than longer breaks in December 2022. From January, there is more of an equal split between short and long breaks intended.

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



Question: 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 November 2022 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: December 2022 n = 140, January 2023 n = 79, February 2023 n = 119, March 2023 n = 129. UK trip 2021-2022: December 2022 n = 98, January 2023 n = 33*, February 2023 n = 67, March 2023 n = 78 *Caution base size is low

London is the most preferred UK overnight destination for both time periods (20% intending to take a trip to London in November to December and 19% in January to March).

Figure 18. Where planning on staying on next UK overnight trip in November to December 2022, Percentage, October to November 2022, UK

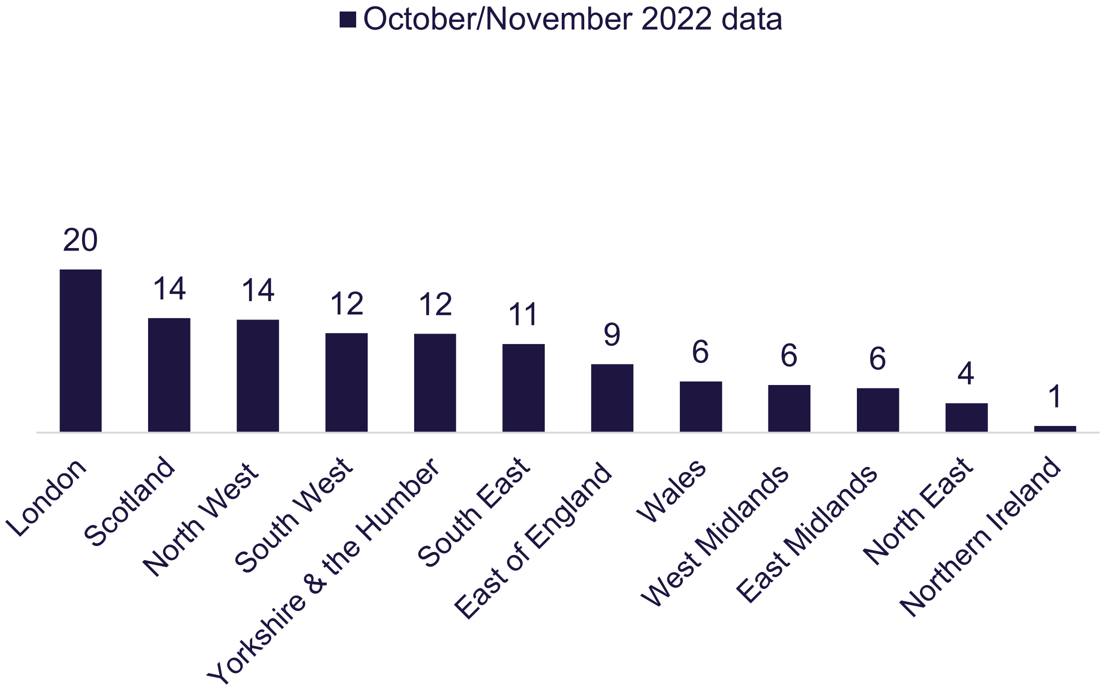
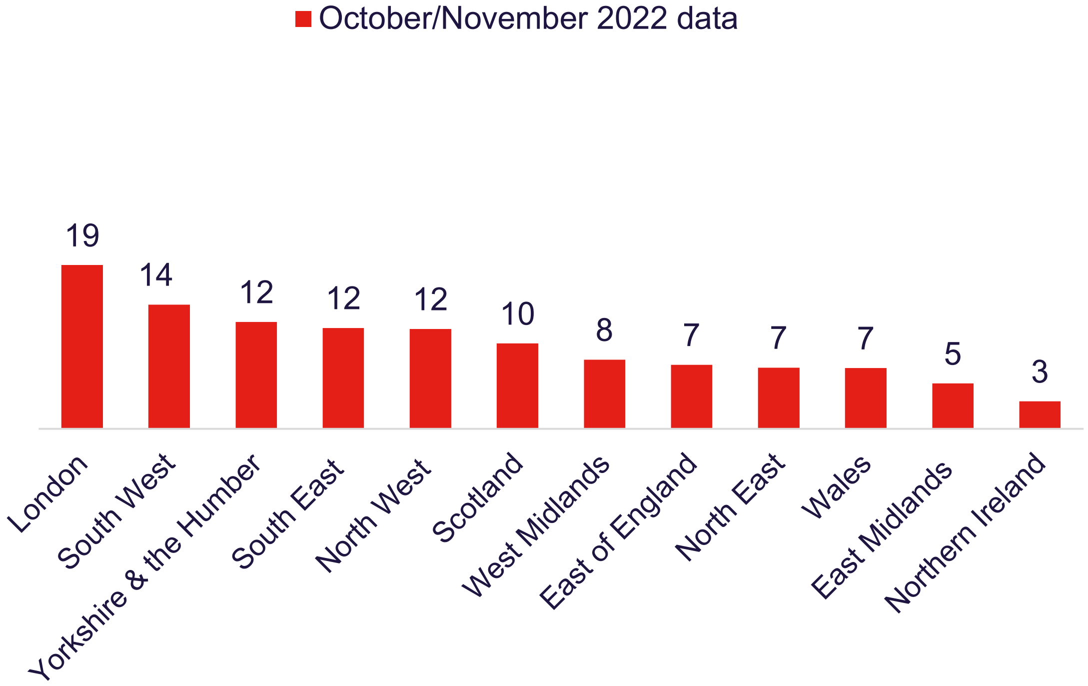


Figure 19. Where planning on staying on next UK overnight trip in January to March 2023, Percentage, October to November 2022, UK



Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All October to November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 479, January to March 2023 n = 572. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

49% are intending to travel to their November to December trip destination using their own car, while 46% are planning to do so for their January to March 2023 trip. Train is the second most preferred transport type in both time periods.

Figure 20. Top 5 main modes of travel to destination for trip in November to December 2022, Percentage, October to November 2022, UK

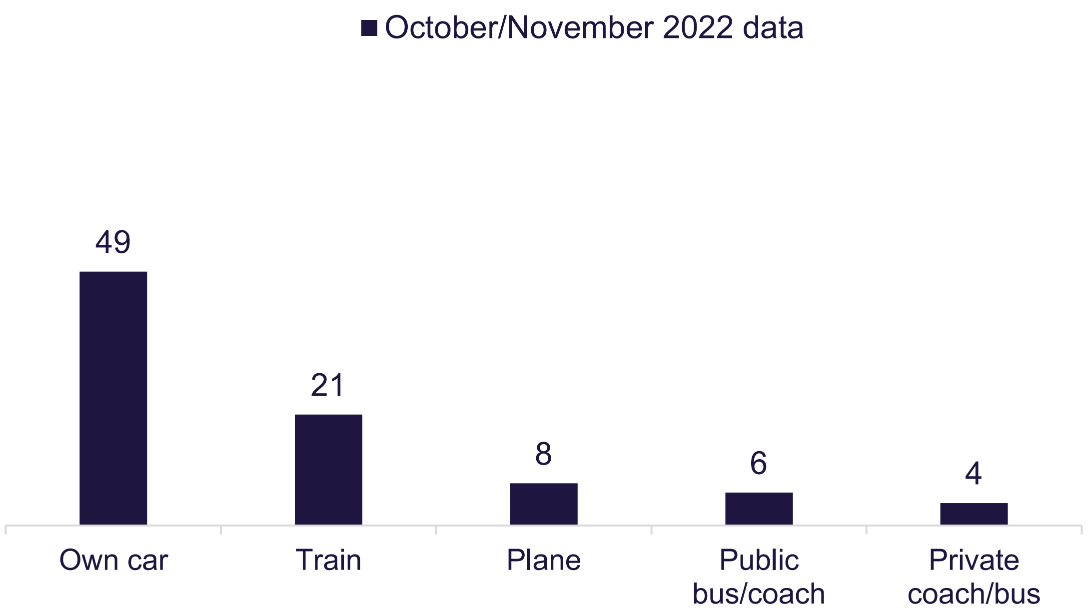
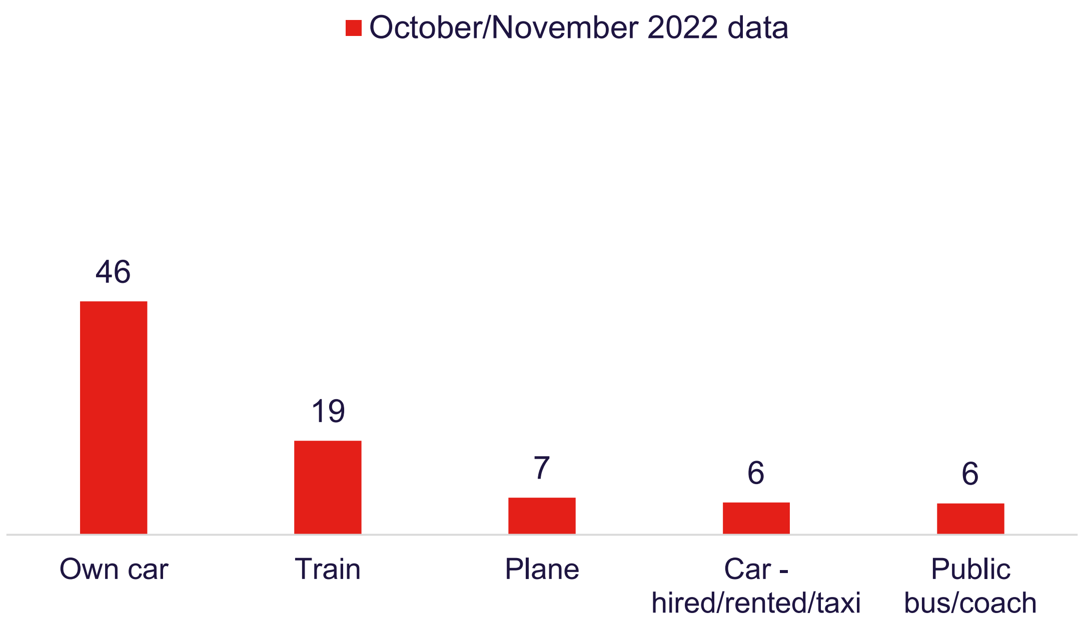


Figure 21. Top 5 main modes of travel to destination for overnight trip in January to March 2023, Percentage, October to November 2022, UK



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

Question: QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All October to November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 479, January to March 2023 n = 572. . *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type.

Figure 22. Top 10 accommodation types planning on staying in on next UK overnight trip in November to December 2022, Percentage, October to November 2022, UK

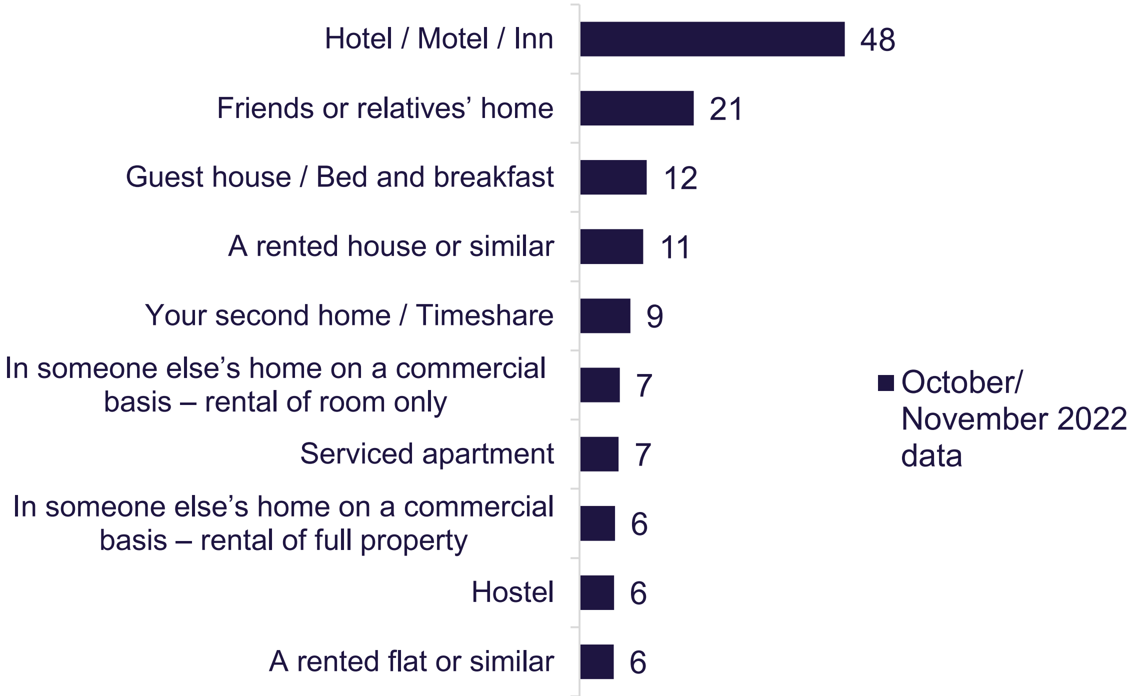
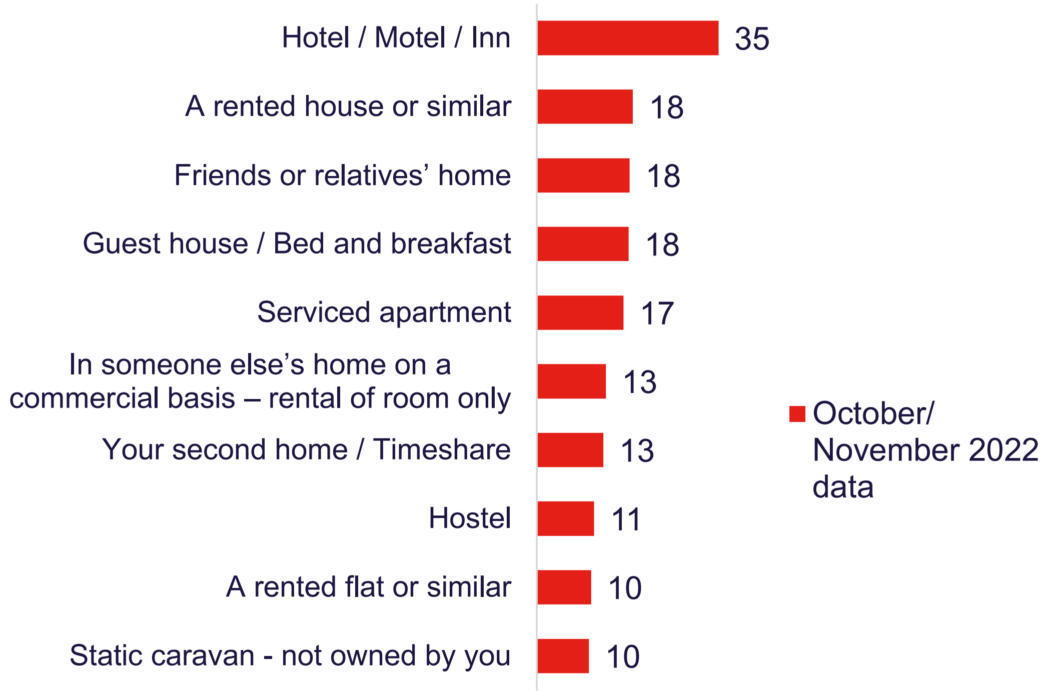


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in January to March 2023, Net Percentage, October to November 2022, UK



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? Base: All October to November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 479, January to March 2023 n = 572. See tables for full breakdown. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

‘Partner’ is the most common companion, followed by ‘child, grandchild or young adult’ for both time periods.

Figure 24. Visitor party make-up for trip in November to December 2022, Percentage, October to November 2022, UK

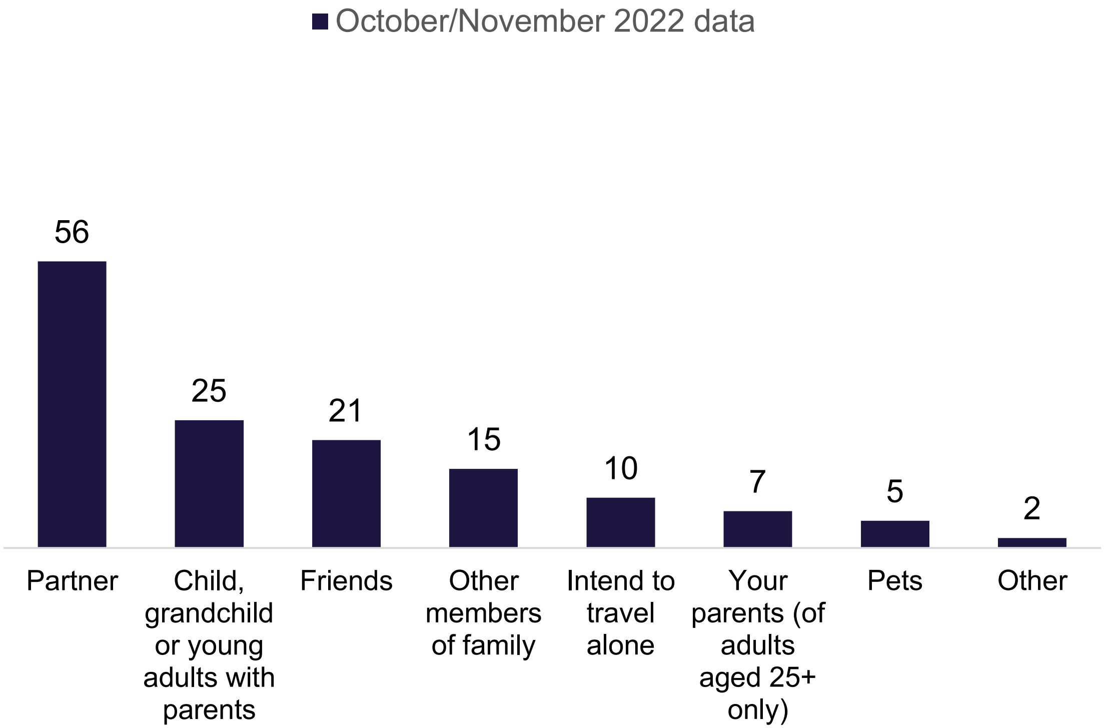
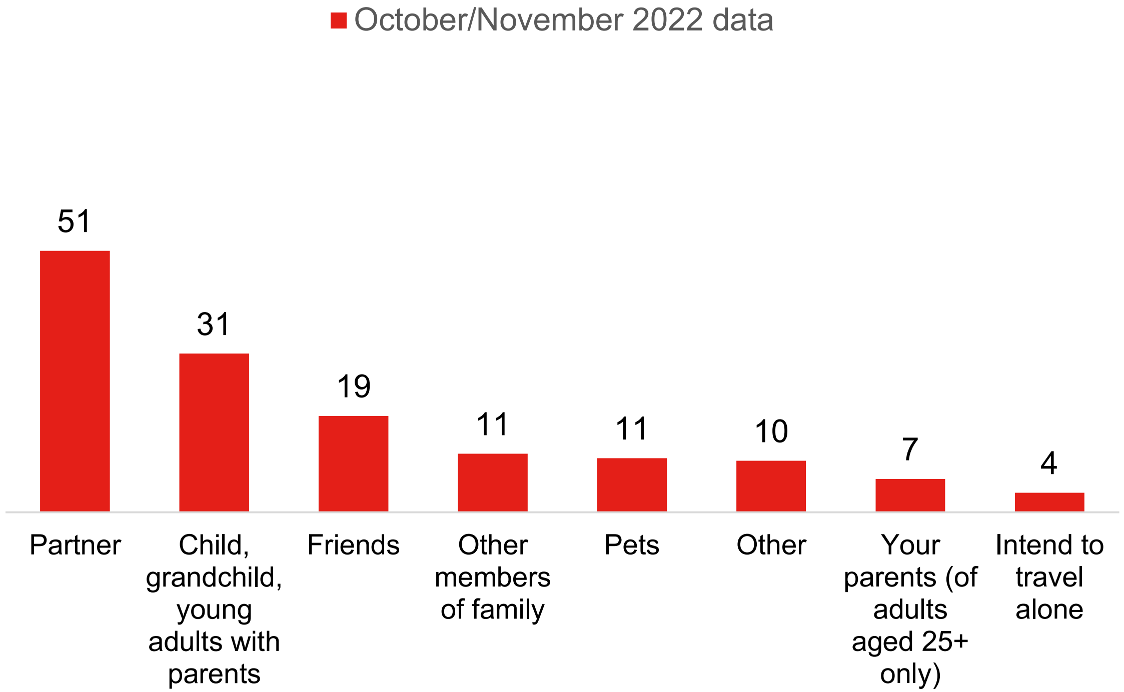


Figure 25. Visitor party make-up for trips taken from trip in January to March 2023, Percentage, October to November 2022, UK



Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All October to November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 479, January to March 2023 n = 572. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

Both time periods share the same top two reasons for going on their next overnight trip – ‘family time or time with my partner’ and ‘to get away from it all and have a rest’.

Figure 26. Motivations for UK holidays and short breaks in November-December 2022, Percentage, November 2022, UK, Full list

Figure 27. Motivations for UK holidays and short breaks in January-March 2023, Percentage, November 2022, UK, Full list

Question: VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 245, January to March 2023 n = 327.
Note: Multiple choice question. Totals may exceed 100%.

Both time periods share the same top four intended activities – ‘trying local food and drink’, ‘walking, hiking or rambling’, ‘visiting cultural attractions’ and ‘visiting heritage sites’.

Figure 28. Activities for UK holidays and short breaks, in November-December 2022, Percentage, November 2022, UK, Full list

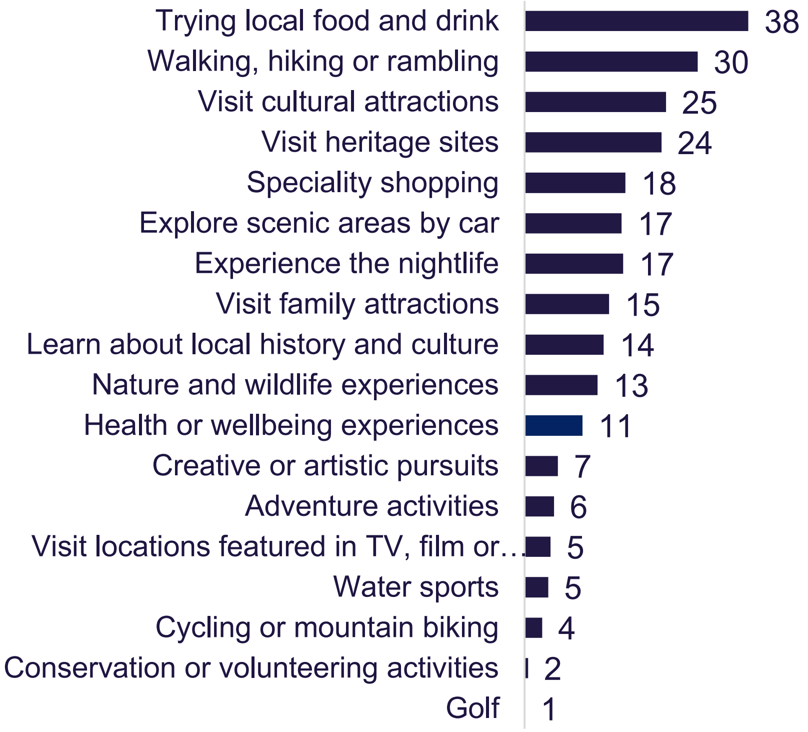
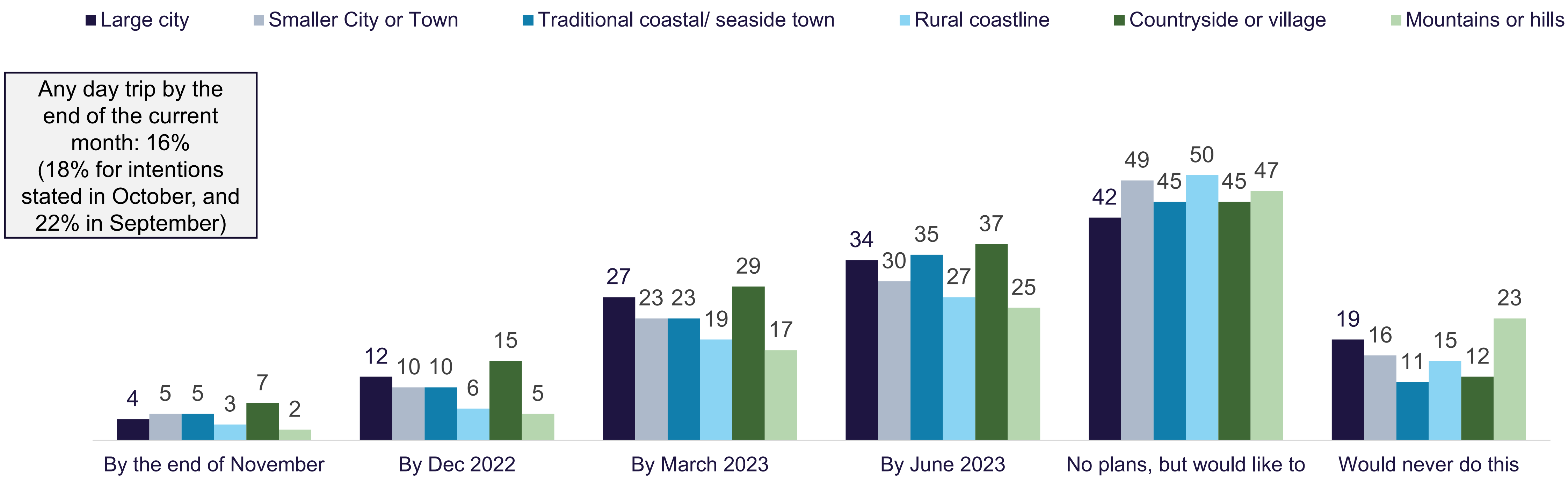


Figure 29. Activities for UK holidays and short breaks in January-March 2023, Percentage, November 2022, UK, Full list

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 November respondents planning on taking a holiday or short break in the UK between November to December 2022 n = 245, January to March 2023 n = 327.
Note: Multiple choice question. Totals may exceed 100%.

In the first week of November, 16% of UK adults intended to take any day trip by the end of November. 'Countryside or village' is the top destination type for a day trip throughout the period from November 2022 to June 2023.

Figure 30. Next UK day trip intention between November 2022 and June 2023, Cumulative percentages, November 2022, UK

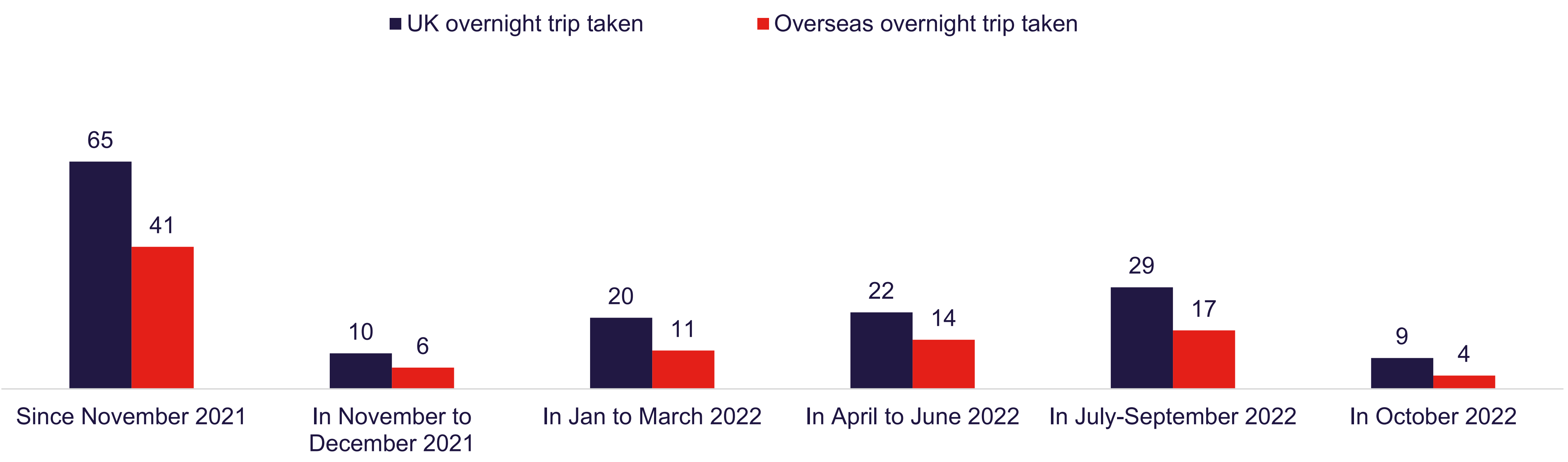


Question: QVB16a. When are you next likely to take a day trip to the following types of places? Please select just the next occasion for each type of destination.
Base: November 2022 = 1,776

4. Past UK and Overseas Trips

Nearly 2 in 3 (65%) have taken a UK overnight trip since November 2021, higher than those that have taken an overseas overnight trip in that period (41%).

Figure 31. Proportion taken an overnight UK or overseas trip in below time period, Percentage, November 2022, 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. November 2022= 1,776
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

The South West of England was the most popular destination for trips in the past three months, 19% of trip takers having stayed there. Holiday / leisure was the most dominant purpose for overnight UK trips (77% having taken trips for this reason).

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

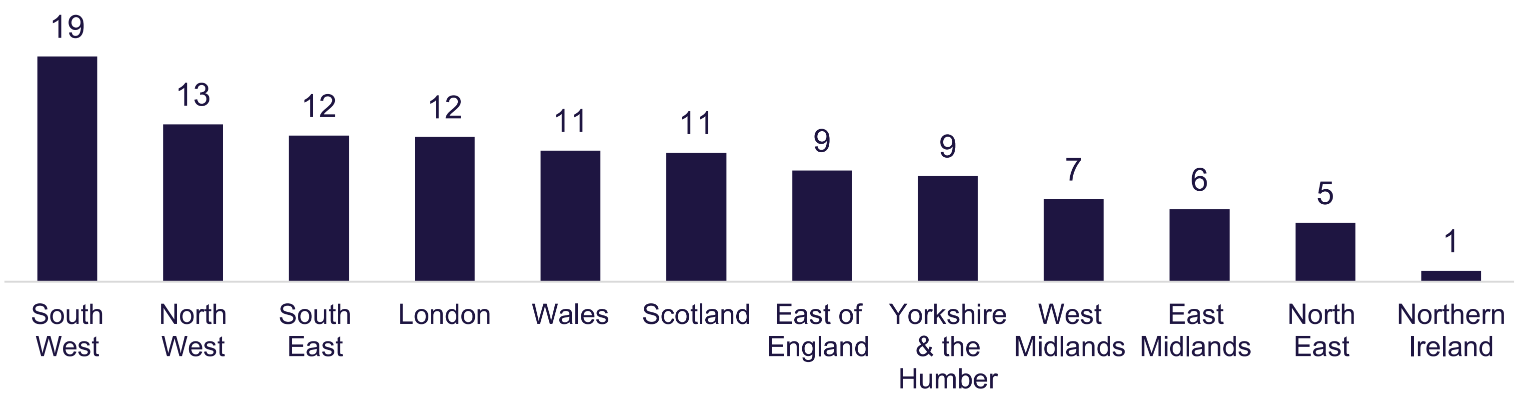
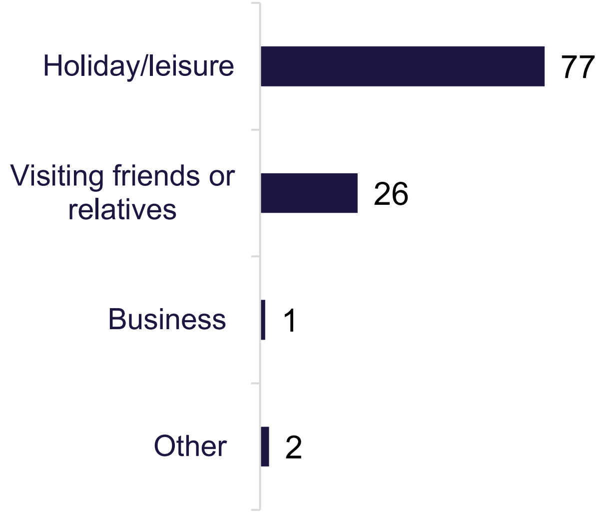


Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, November 2022, UK



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 October respondents that took an overnight trips in the last three months n= 460.
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

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

18% of UK adults in employment plan on taking an overnight business trip in the next 3 months (consistent with former waves). 'Team building' is the leading reason for taking one (at 30%), followed by 'meeting 6 or more people' (at 26%).

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

80% of UK adults interviewed are in employment

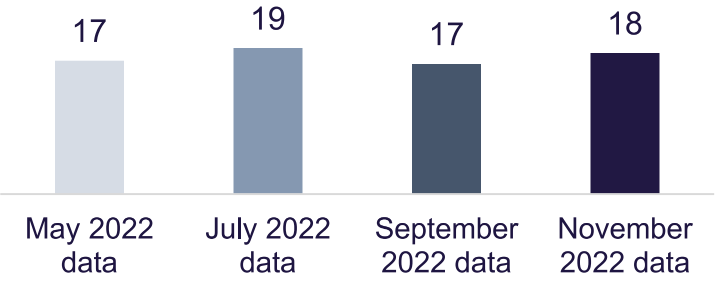
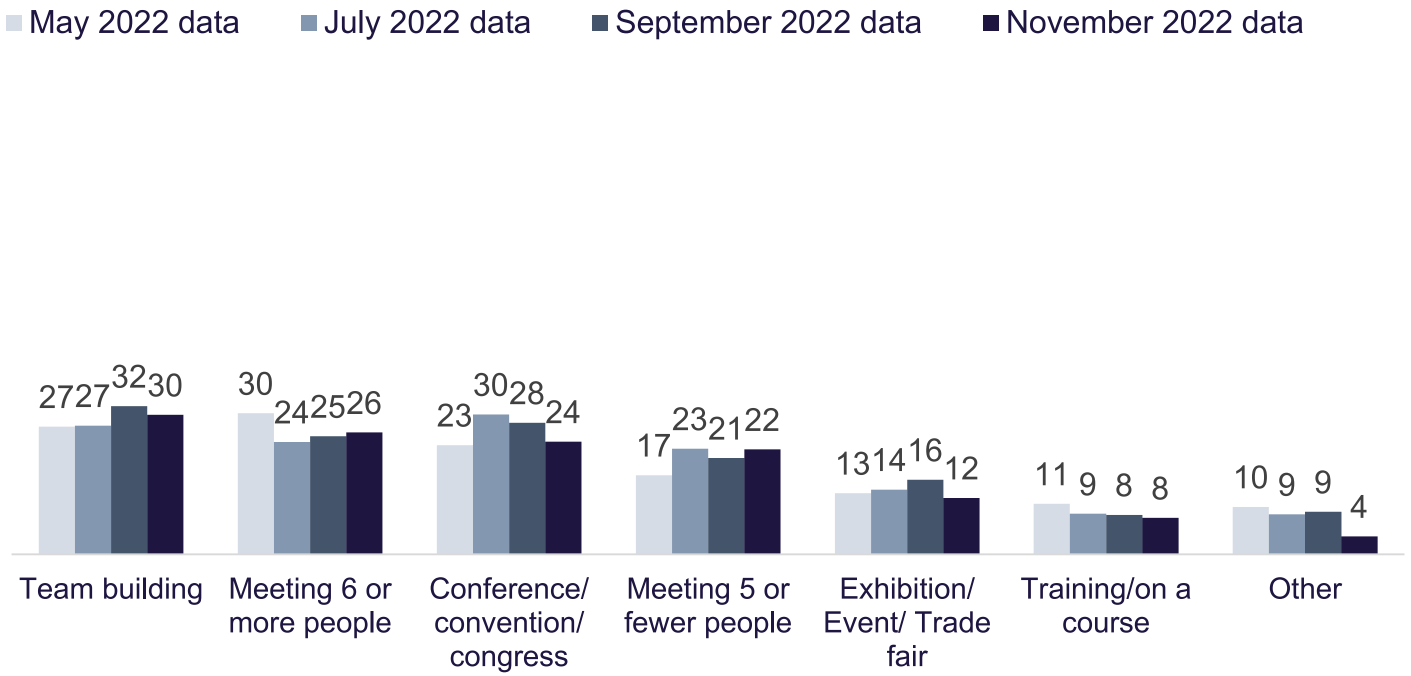


Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, November 2022, UK adults in employment planning a trip



Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer 'no'. Please also answer 'no' if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office).Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.
VB14b: What would be the main reason for this overnight business trip? Base: November 2022 respondents currently in employment n = 1,361. All taking a business trip n=296.

Methodology & Further Data

Methodology

- This report presents findings from the November 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. Attractions/events would 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. Leisure activities 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.