Domestic Sentiment Tracker: February 2023

Published: February 2023

Fieldwork Period: 1st to 7th February 2023

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 February 2023
- The results (both, reports and data tables) are made publicly available and updated each wave at the following website:

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

Definitions used within this report

In this report, we look at the behaviour and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip.

- **February to March 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between February and March 2023
- **April to June 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 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+

February 2023: Scorecard of Key Metrics

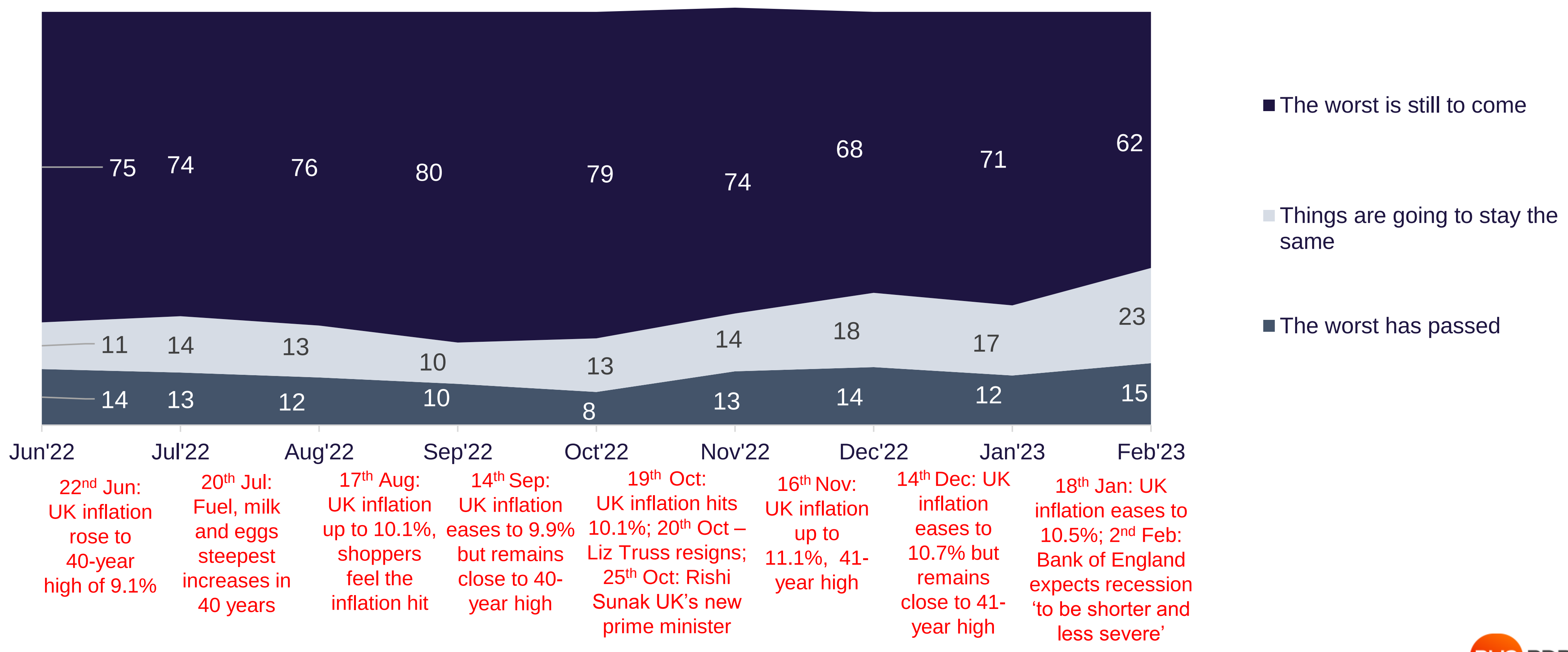
Key Metrics	February 2023	Change since January 2023
% of UK adults stating ‘WORST IS STILL TO COME’ in regard to cost of living crisis	62%	-9%*
Proportion intending a UK overnight trip at any point <u>in the next 12 months</u>	72%	+2%
Proportion intending an overseas overnight trip <u>at any point in the next 12 months</u>	51%	-1%
Preference for UK over overseas in the next 6 months (vs pre-pandemic)	36%	+5%*
Took a domestic overnight trip in the past 12 months (Feb 2022 – Jan 2023)	61%	0%
Net proportion of UK trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]	4%	-3%
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]	-20%	-5%*
Reduce the number of UK overnight trips due to cost of living crisis [NET ‘fewer’, ‘not go’, ‘go day trips instead’]	30%	+1%
Reduce the number of day trips due to cost of living crisis [NET ‘fewer’, ‘not go on day trips’]	34%	0%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1st Rising cost of living; 2nd Personal finances; 3rd Rising costs of holidays	No change

* Represents a statistically significant change on previous wave

1. Current General Sentiment

With regards to the cost of living crisis, 1 in 4 now perceive that things are going to stay the same in the next few months.

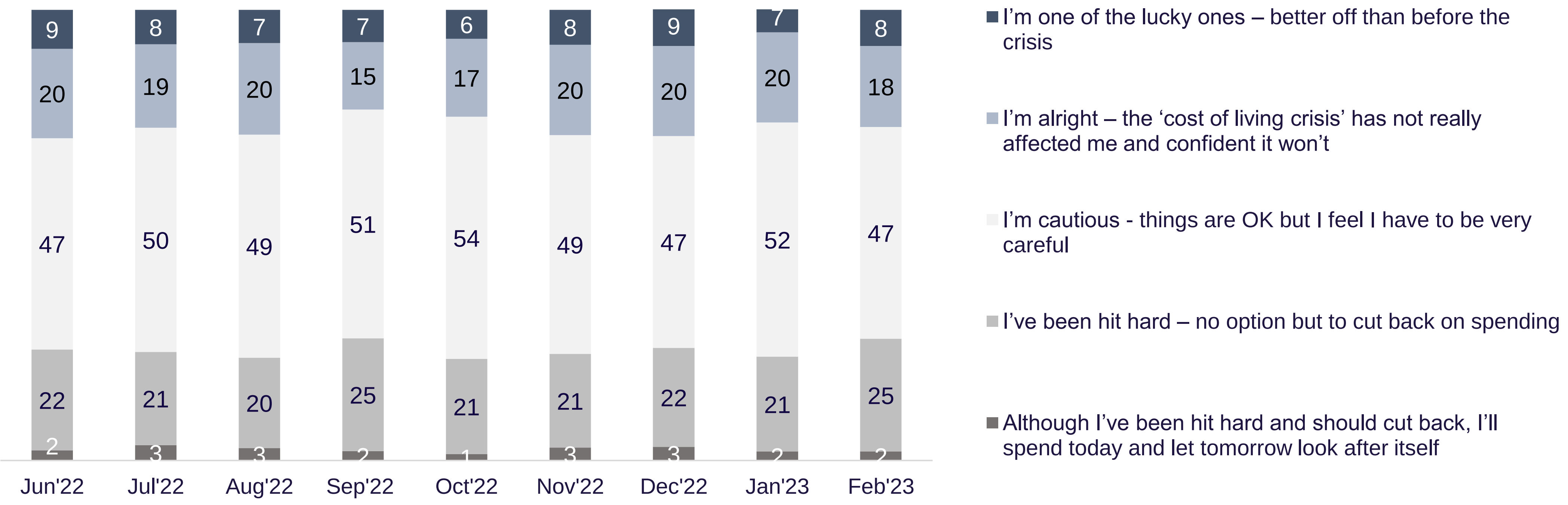
Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK



Question: Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. February 2023 = 1,757

The majority of UK adults (74%) are either cautious (47%) or have been 'hit hard' (27%) by the cost of living crisis.

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

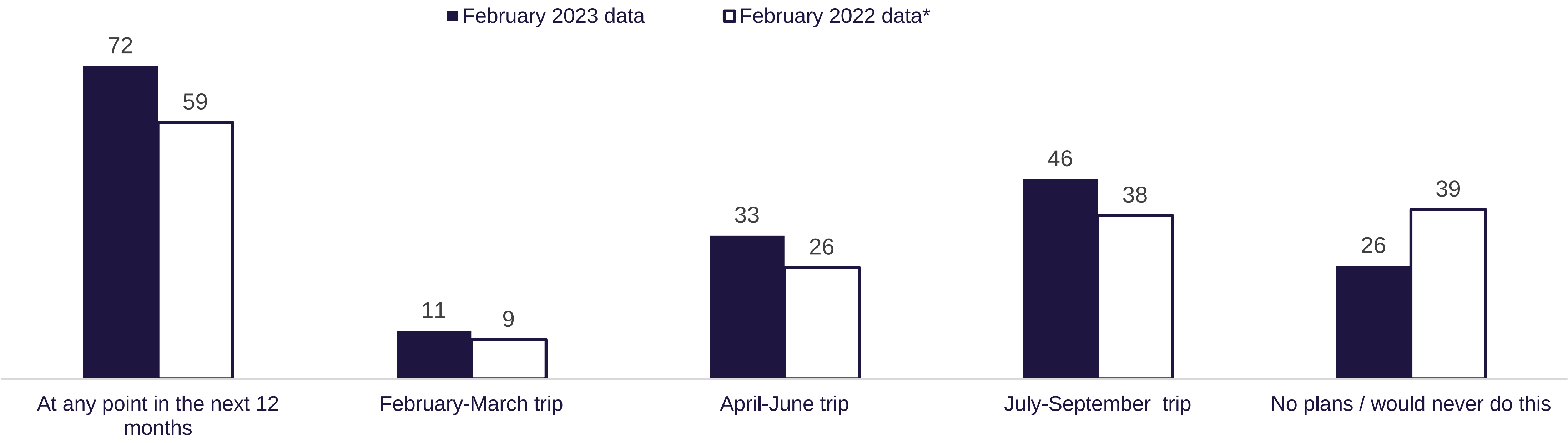


Question: Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. February 2023 = 1,757.

2. Trip Intentions: UK and Overseas

<u>Overnight domestic trip</u> intentions are above the levels anticipated back in February 2022, 11% planning a trip in February to March 2023, and 33% between April and June.

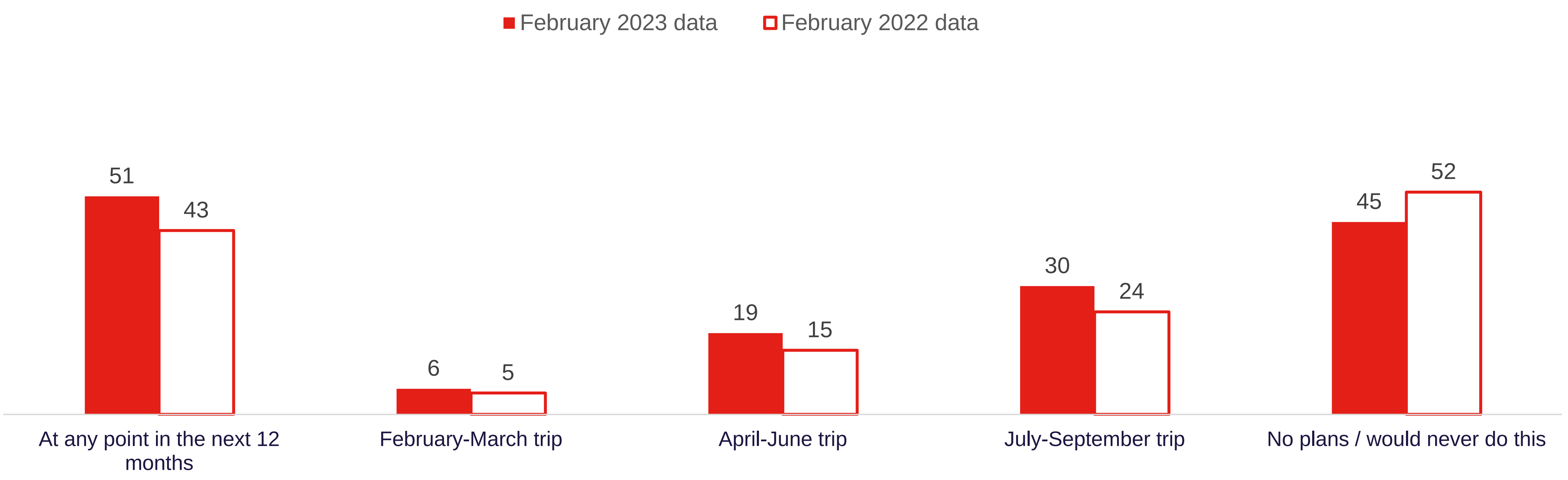
Figure 5. Proportion anticipating going on <u>any</u> overnight UK trips, Percentage, February 2023, UK



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. February 2022 = 1,756, February 2023 = 1,757. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. ***February 2022 fieldwork was within the period of time when Omicron was highly prevalent**

For overnight overseas trips, intentions are also much higher than in February 2022, in particular between July and September.

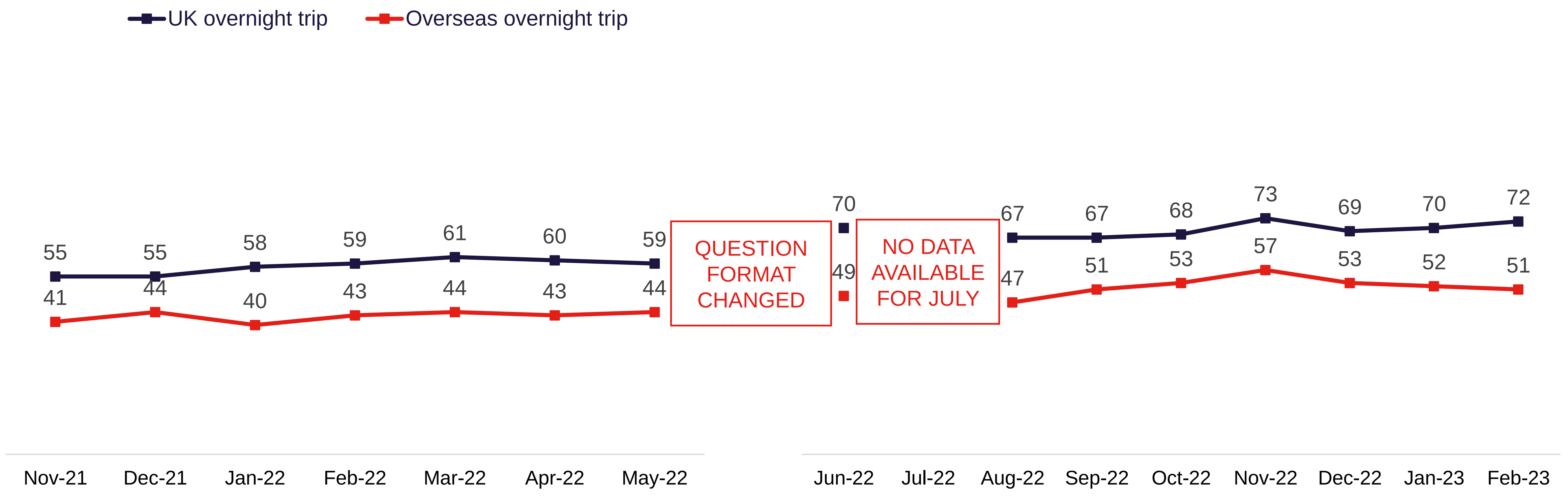
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, February 2023, UK



Question: QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. February 2022 = 1,756, February 2023 = 1,757. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Long term domestic overnight trip intentions have slightly increased and overseas ones are stable compared to January 2023.

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



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. February 2023 = 1,757. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

At a 'net level', the number of intended domestic trips by UK adults is above pre-pandemic levels – overseas intentions still way below.

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, February 2023, UK

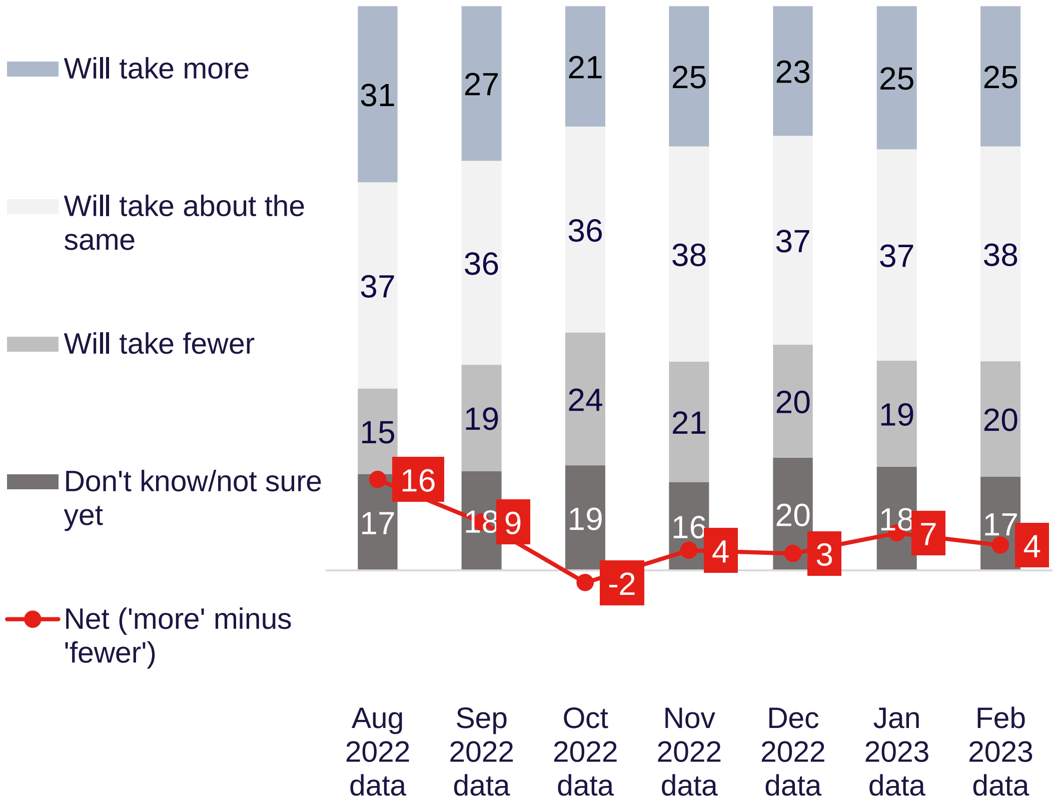
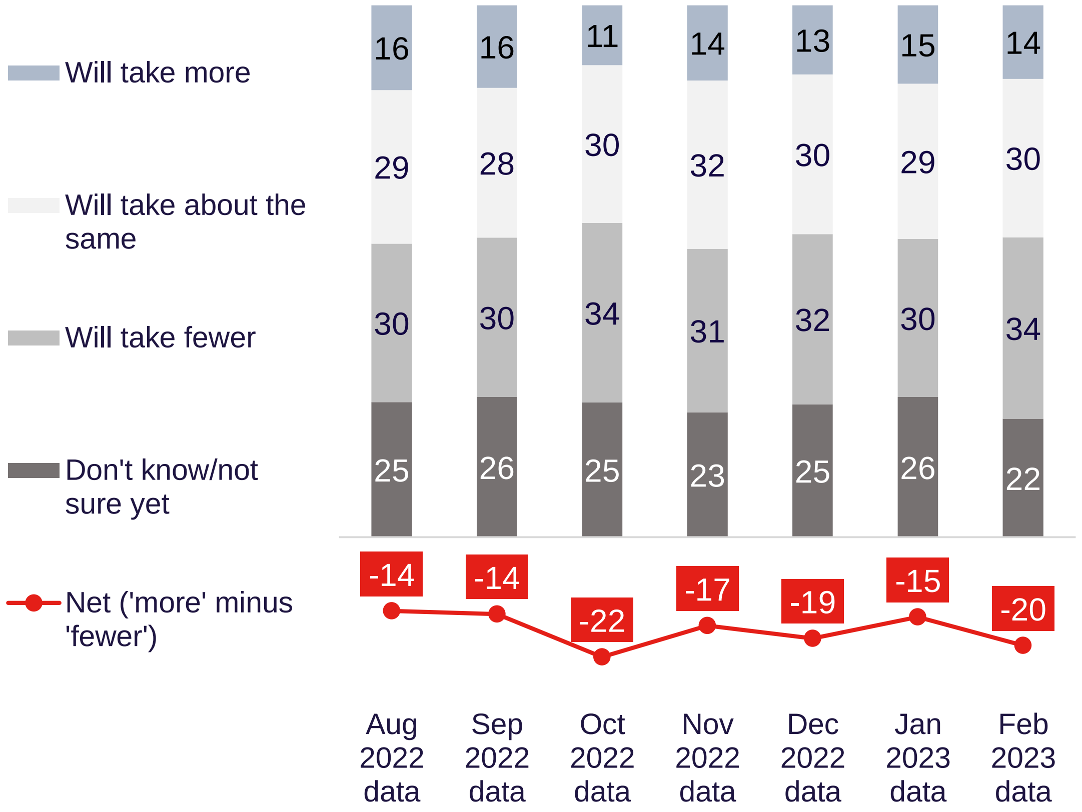


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, February 2023, UK



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. February 2023 = 1,757.

36% of respondents indicated they are more likely to choose a trip in the UK than overseas, compared to pre-pandemic – the top reason being 'UK holidays are easier to plan' (60%).

Figure 9. Difference in short break/holiday choices in the next 6 months compared to pre-pandemic, Percentage, February 2023, UK

TOP 5 reasons for UK preference

1. UK holidays are easier to plan (60%)
2. UK holidays are cheaper (48%)
3. Shorter / quicker travel (41%)
4. To avoid long queues at airports/cancelled flights (35%)
5. I want to take holidays in places I am familiar with (30%)

TOP 5 reasons for Overseas preference

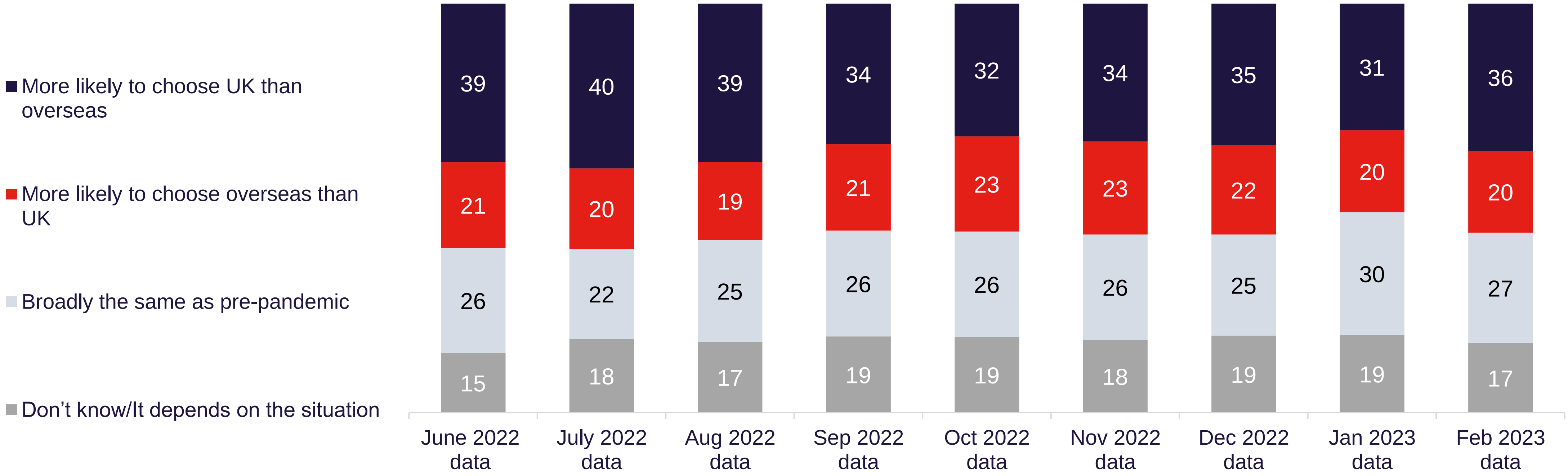
1. Better weather (40%)
2. I want to visit new places (36%)
3. I want to explore other cultures (31%)
4. Overseas holidays are cheaper (28%)
5. I'm prioritising overseas trips after missing out during the pandemic (26%)

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. February 2023 = 1,757. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? February 2023 = 616, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? February 2023 = 363

The proportion of those more likely to choose domestic over holidays overseas has increased in the last month.

Figure 9b. Preference for UK vs overseas short break/holidays in the next 6 months, compared to pre-pandemic, Percentage, February 2023, UK



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. February 2023 = 1,757.

The top potential barrier to taking overnight UK trips in the next 6 months is the 'rising cost of living', followed by 'personal finances' and 'rising costs of holidays'.

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

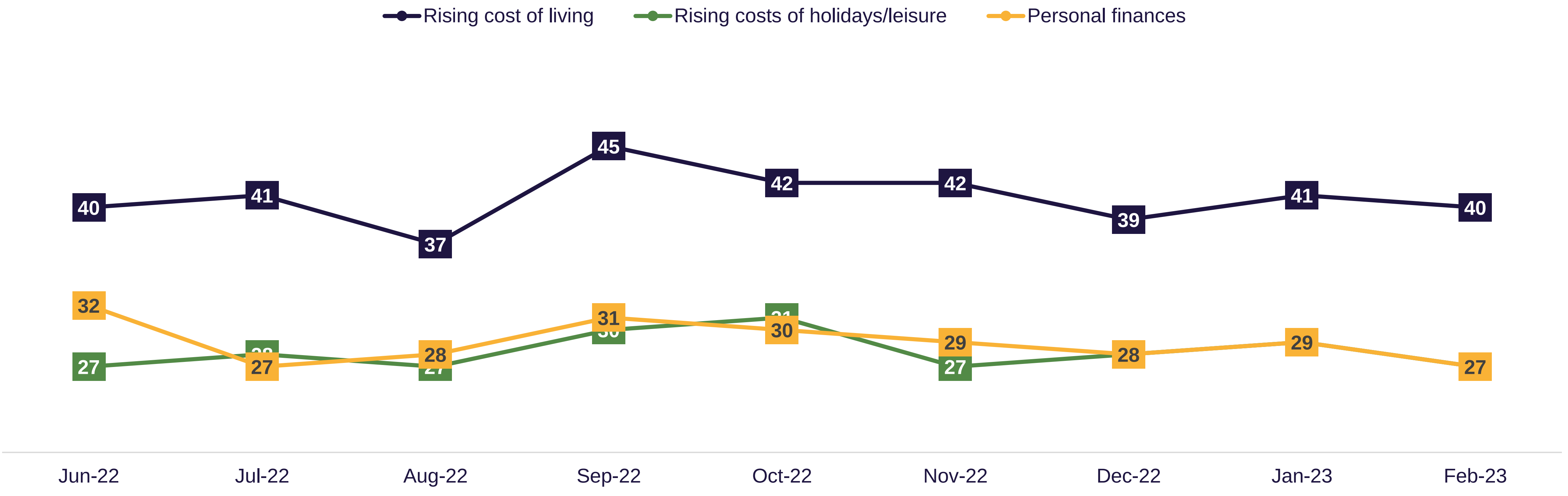
	November 2022 data	December 2022 data	January 2023 data	February 2023 data
NET: Costs and finances	56%	57%	58%	59%

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

Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months? .
Base: All asked each question. February 2023 = 1,757. *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 individual financial barriers vary slightly month on month, with a slight decline recorded in February.

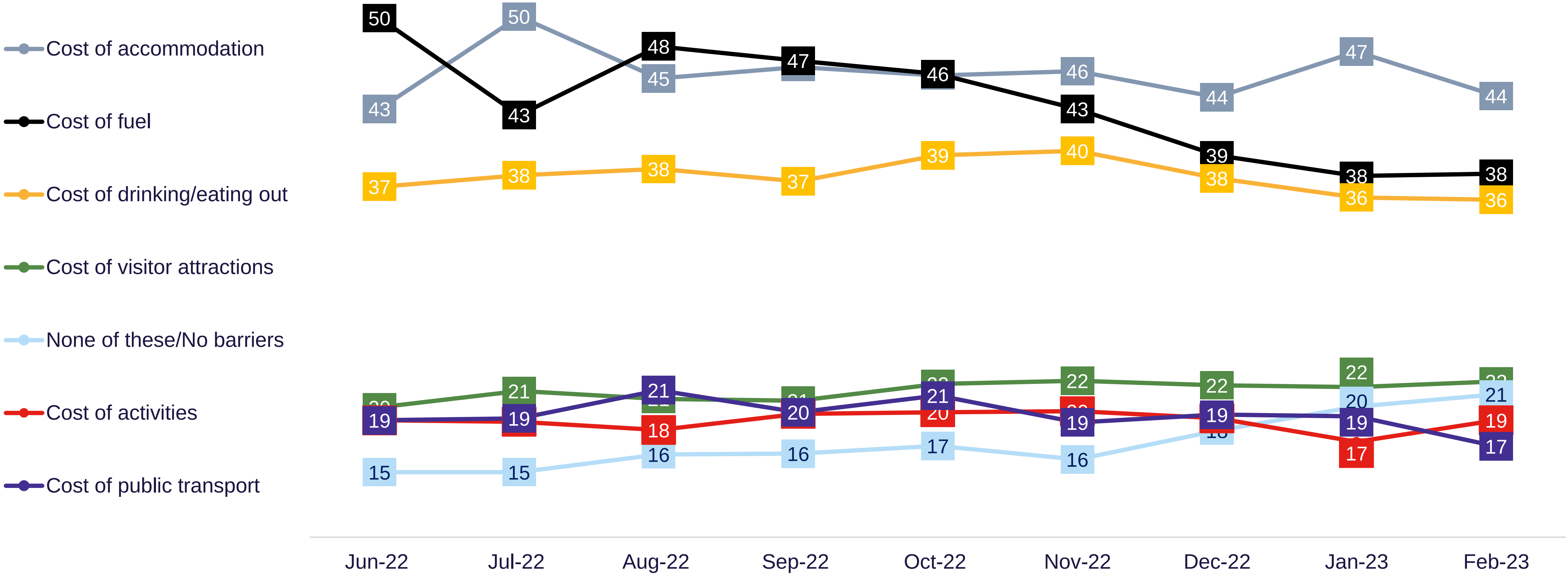
Figure 10b. <u>Perceived financial barriers </u>to an overnight trip in the UK in <u>next 6 months</u>, Wave-on-wave, Percentage, UK



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. February 2023 = 1,757.

Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of accommodation, despite a slight decline, remains at the top.

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



Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: February 2023 = 1757.

UK adults plan to cut their overnight trip spending mainly on, accommodation, activities and eating out. 30% will cut the number of trips, in line with data from the previous two waves.

Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, February 2023, UK, Full list

Reduce the number of UK overnight trips	November 2022 data	December 2022 data	January 2023 data	February 2023 data
NET 'fewer', 'not go', 'go day trips instead'	36%	30%	29%	30%

Question: VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?
Base: February 2023 = 1757.

In terms of UK day trips, 29% of UK adults intend to look for more free things to do. 34% will reduce the number of day trips – in line with last wave.

Figure 13b. 'Cost of living' impact on day trips, Percentage, February 2023, UK, Full list

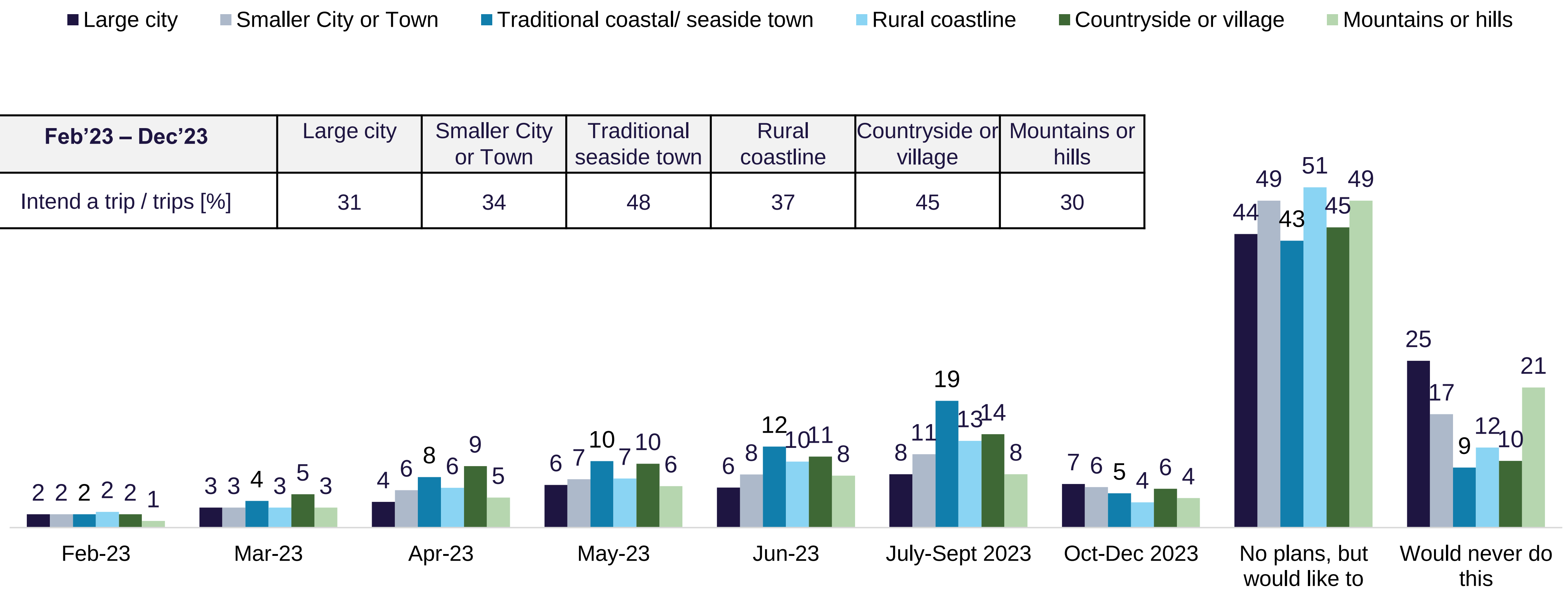
Reduce the number of day trips	November 2022 data	December 2022 data	January 2023 data	February 2023 data
NET 'fewer', 'not go on day trips'	44%	36%	34%	34%

Question: VB7Cii. How, if at all, would you say the 'cost of living crisis' is likely to influence your day trips in the next few months?
Base: February 2023 = 1757.

The top destination type for an overnight domestic trip up to April 2023 is 'Countryside or village'. From June to September 2023 it is 'traditional coastal/seaside town'.

Figure 14. Overnight trips intentions in next year by destination type, Percentage, February 2023, UK

Feb'23 – Dec'23	Large city	Smaller City or Town	Traditional seaside town	Rural coastline	Countryside or village	Mountains or hills
Intend a trip / trips [%]	31	34	48	37	45	30

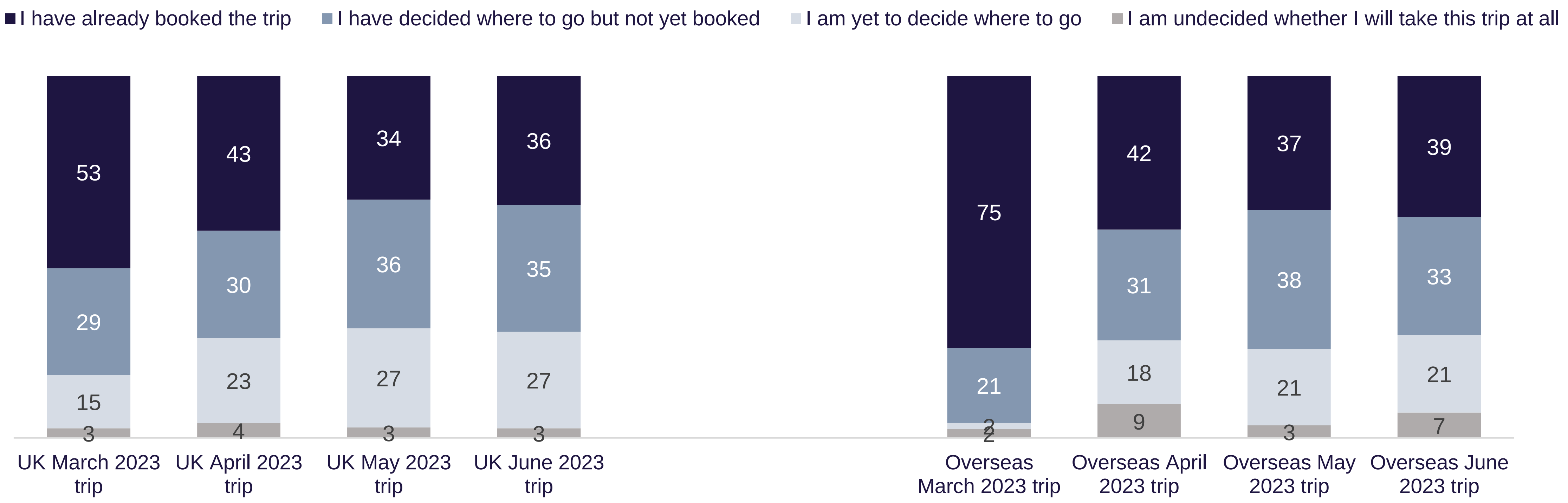


Question: VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Please select all possible occasions, not just the next one. Base: February 2023 = 1,757.

3. The Next Trip: Overnight and Day Trips

53% of UK adults have already booked their <u>domestic</u> trips for March, while 75% have already booked their <u>overseas</u> trips for March.

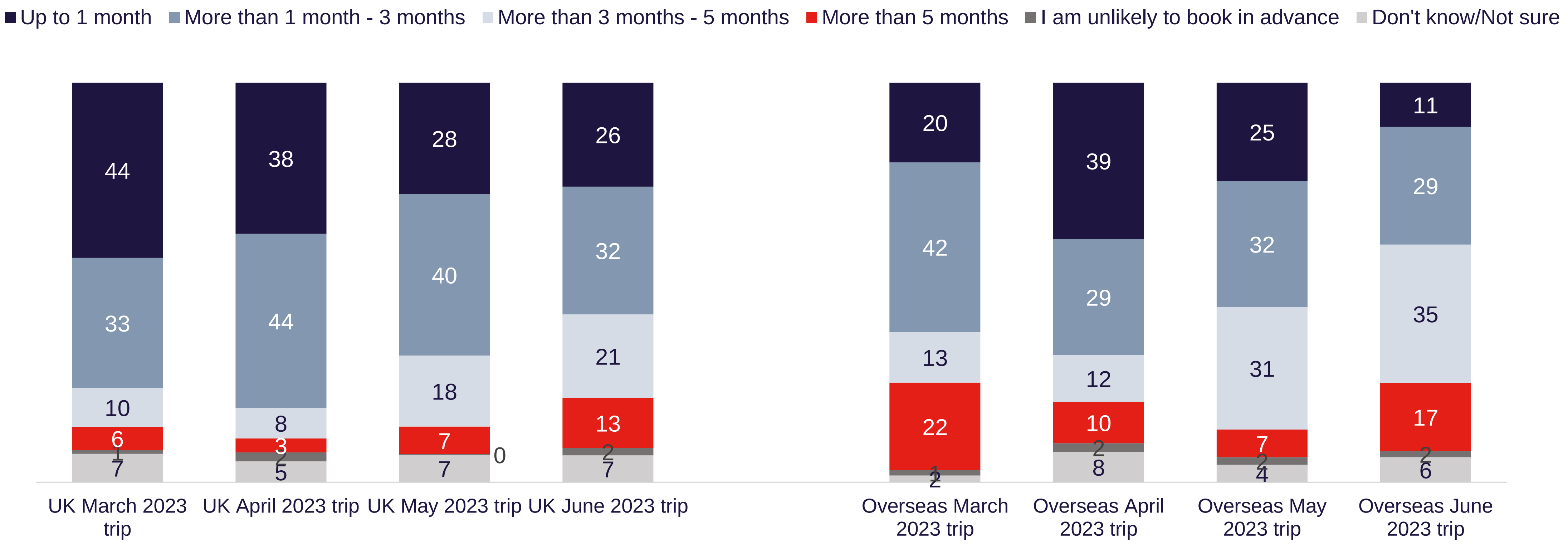
Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, February 2023, UK



Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: March 2023 n = 93, April 2023 n = 159, May 2023 n = 166, June 2023 n = 159. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: March 2023 n = 58, April 2023 n = 84, May 2023 n = 111, June 2023 n = 110.

Domestic March trips are mostly booked within a month of going, while overseas March trips are more likely to be booked 1 to 3 months ahead.

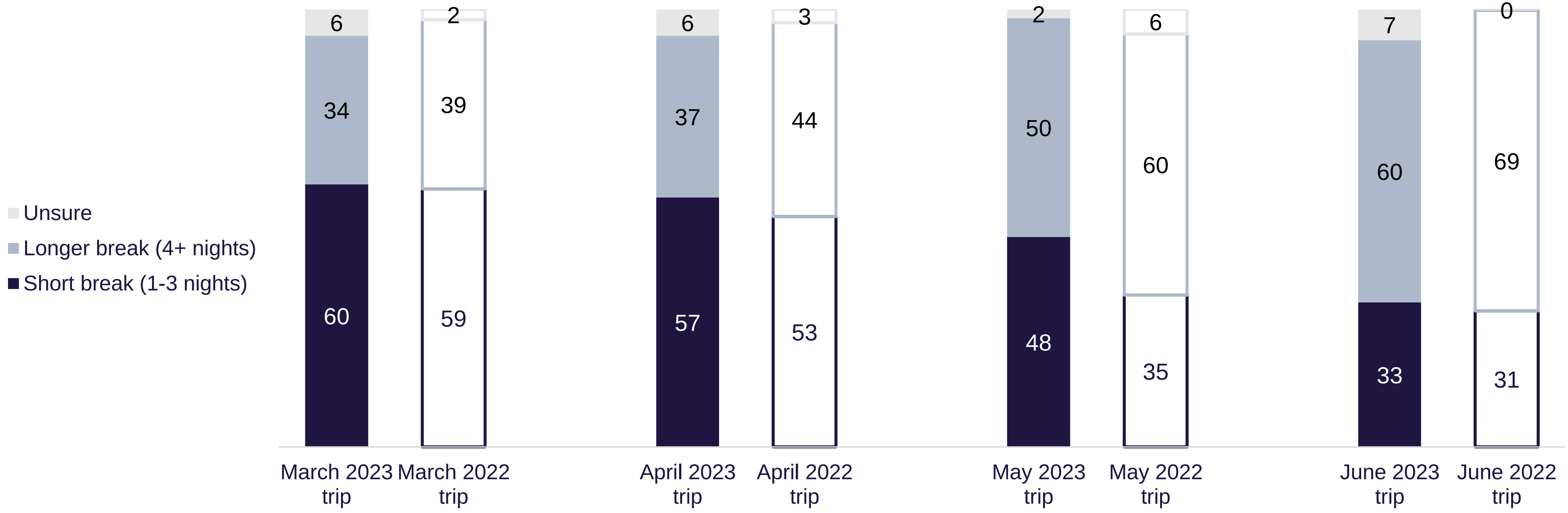
Figure 16. Time between booking the next UK and overseas overnight trip and first day of that trip, Percentage, February 2023, UK



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: March 2023 n = 93, April 2023 n = 159, May 2023 n = 166, June 2023 n = 159. 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: March 2023 n = 58, April 2023 n = 84, May 2023 n = 111, June 2023 n = 110.

Between March and April, short breaks are more common than longer breaks. During May and June, longer breaks are more likely. Both comparable with figures reported a year ago.

Figure 17. Length of next UK holiday or short break by time period, Percentage, February 2023, 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 February 2023 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: March 2023 n = 93, April 2023 n = 159, May 2023 n=166, June 2023 n=159. UK trip 2021-2022: March 2022 n = 97, April 2022 n = 124, May 2022 n=117, June 2022 n=131

The South West is the most preferred UK overnight destination in both time periods. Fewer expect to visit London in February to March 2023 compared to a year ago.

Figure 18. Where planning on staying on next UK overnight trip in February to March 2023, Percentage, January 2023 to February 2023, UK

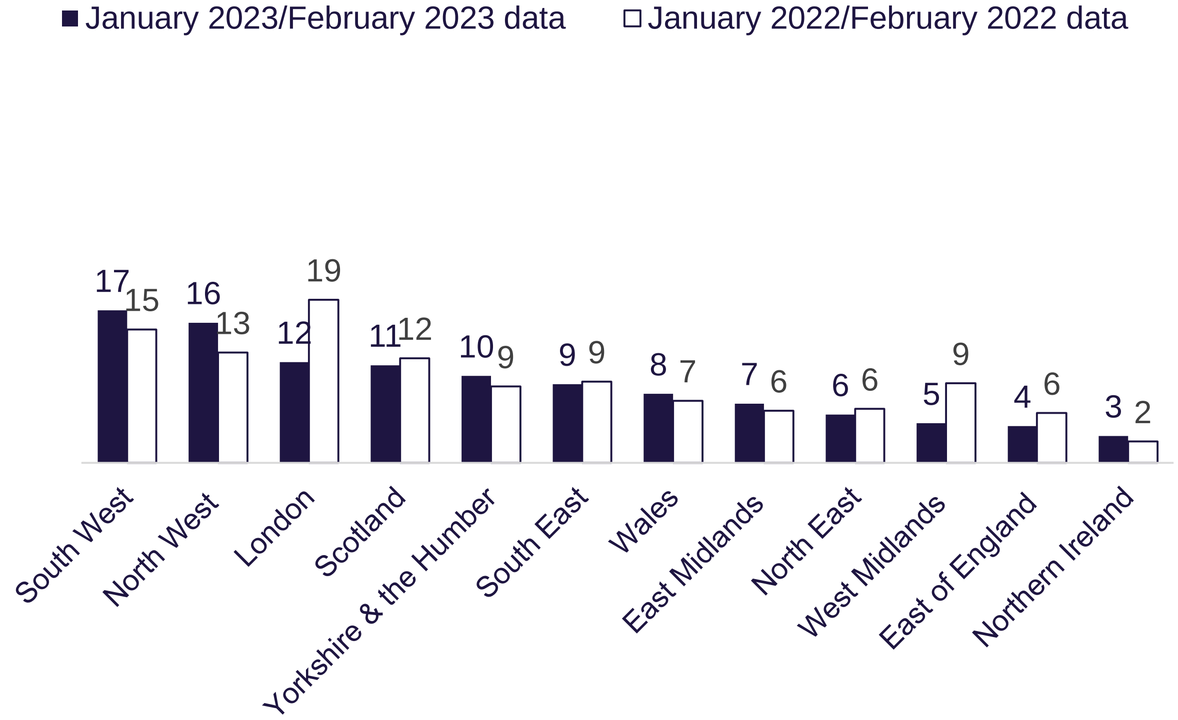
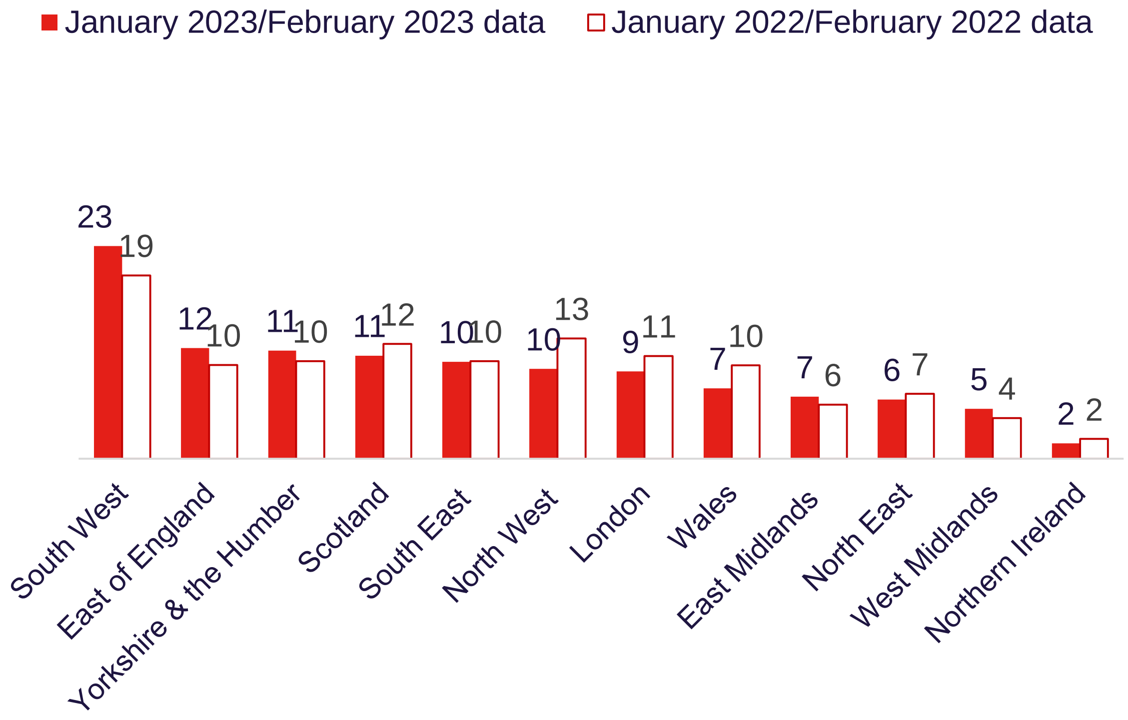


Figure 19. Where planning on staying on next UK overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK



Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

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

Figure 20. Top 5 main modes of travel to destination for trip in February to March 2023, Percentage, January 2023 to February 2023, UK

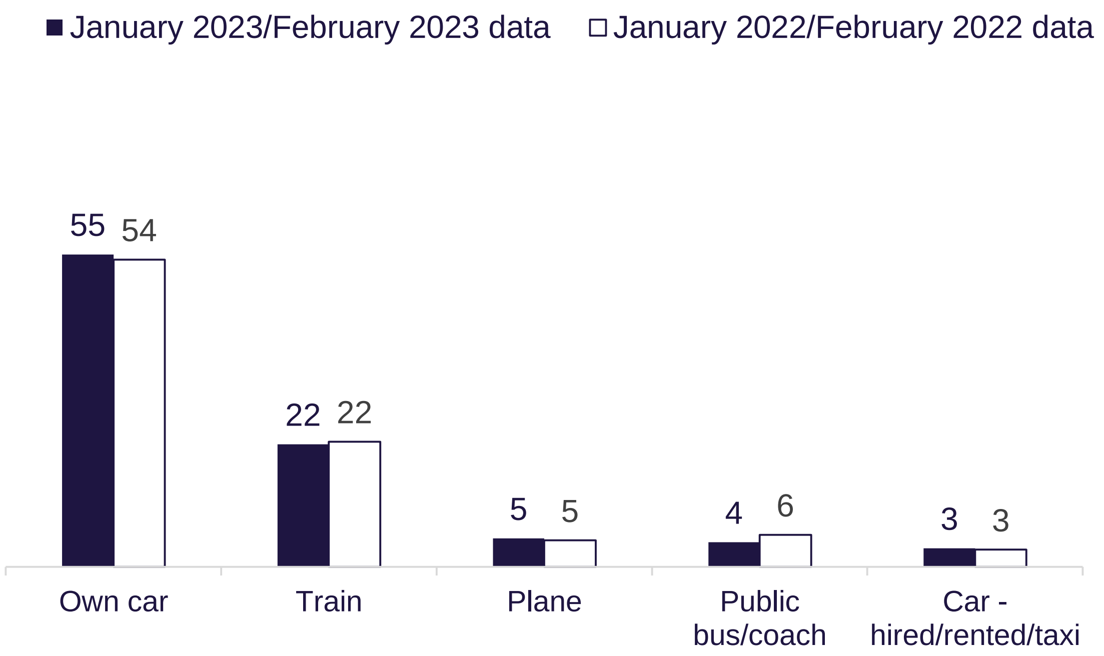
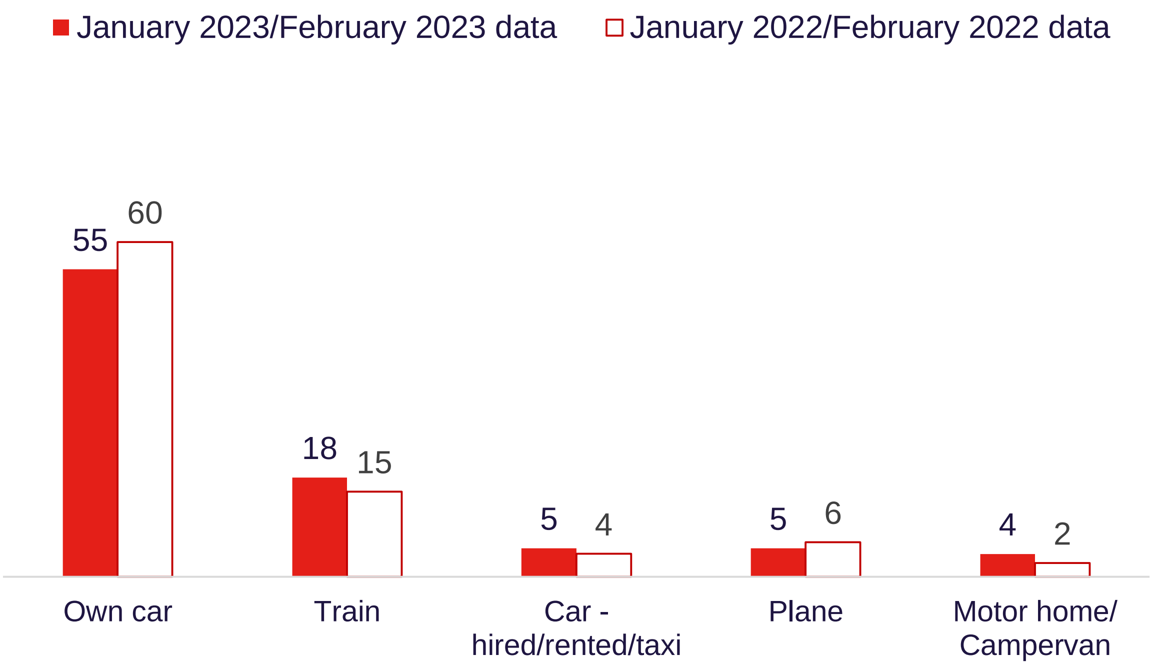


Figure 21. Top 5 main modes of travel to destination for overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK



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 January 2022 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706

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 February to March 2023, Percentage, January 2023 to February 2023, UK

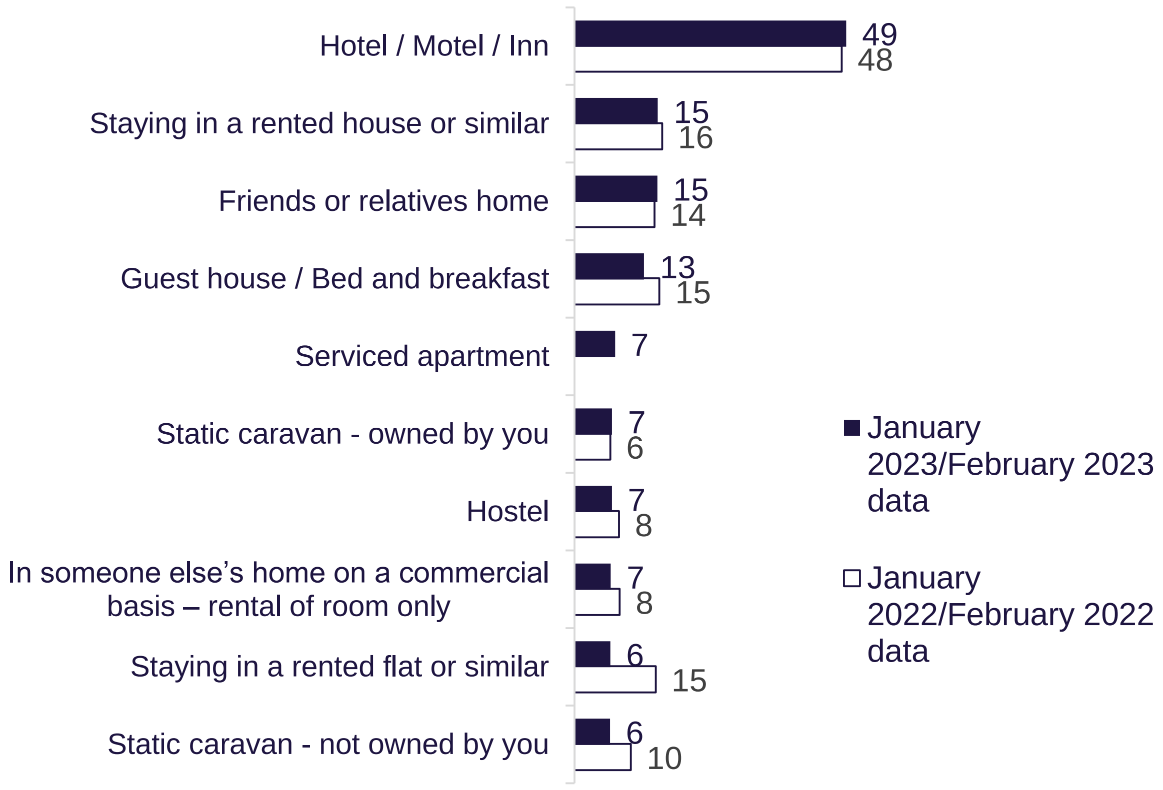
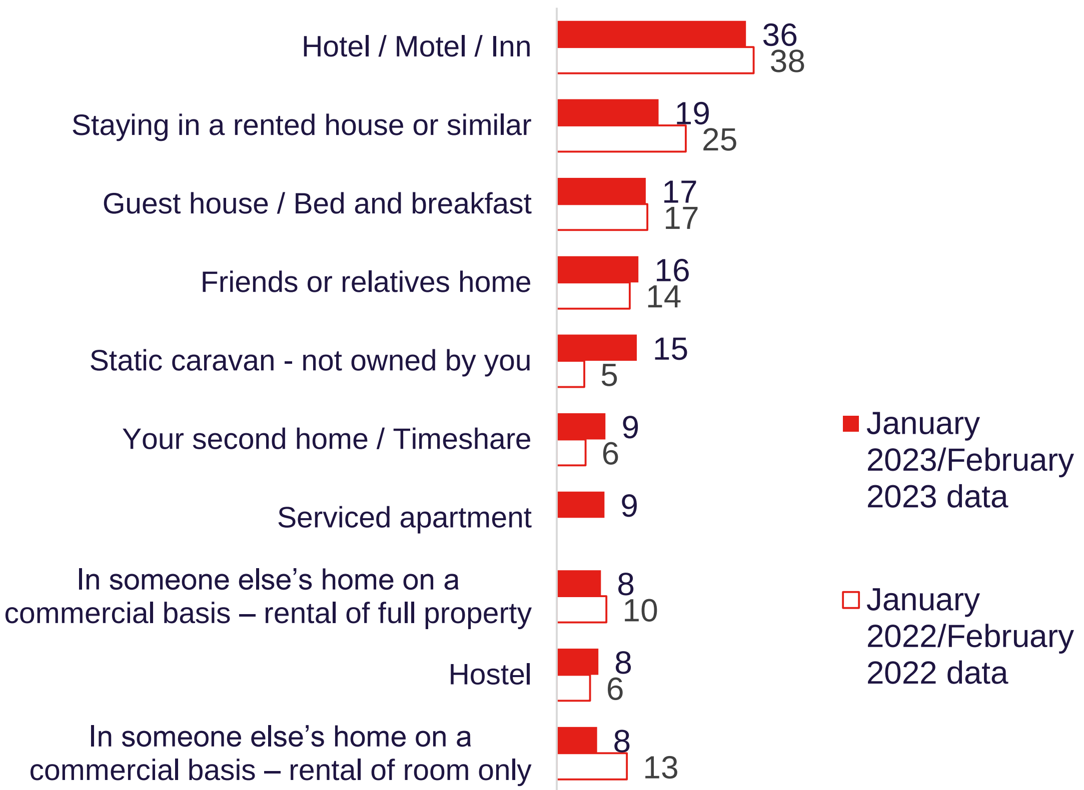


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK



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 January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706 See tables for full breakdown.

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

Figure 24. Visitor party make-up for trip in February to March 2023, Percentage, January 2023 to February 2023, UK

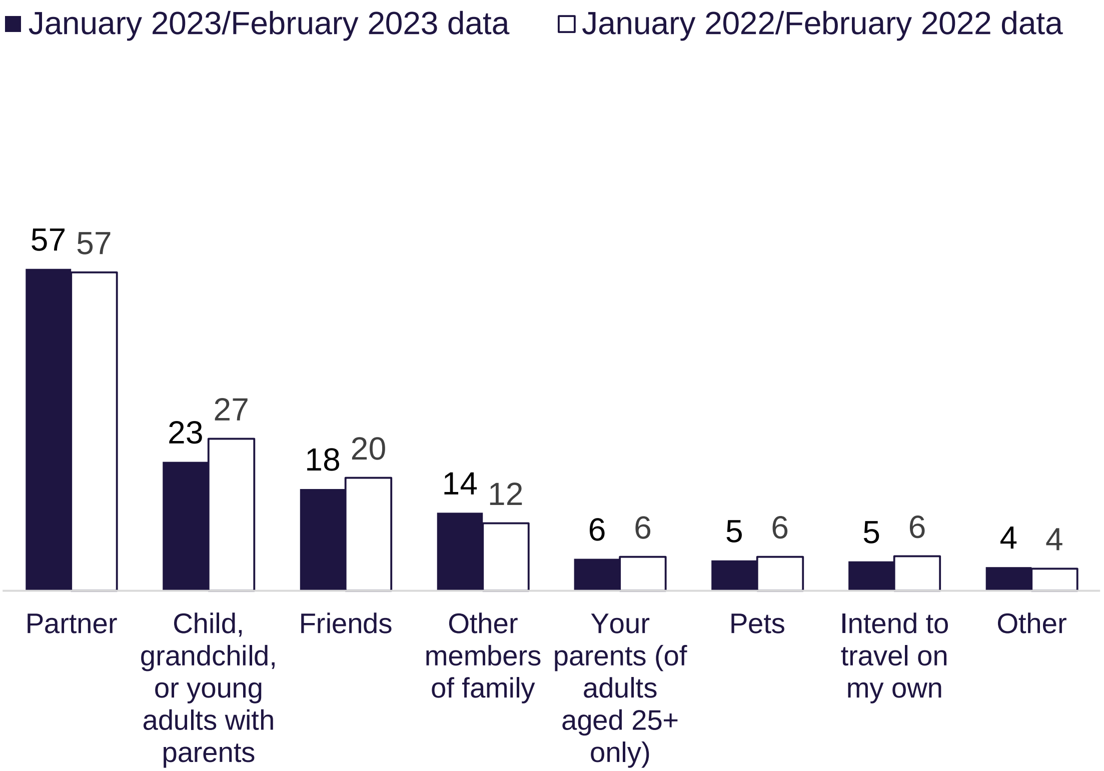
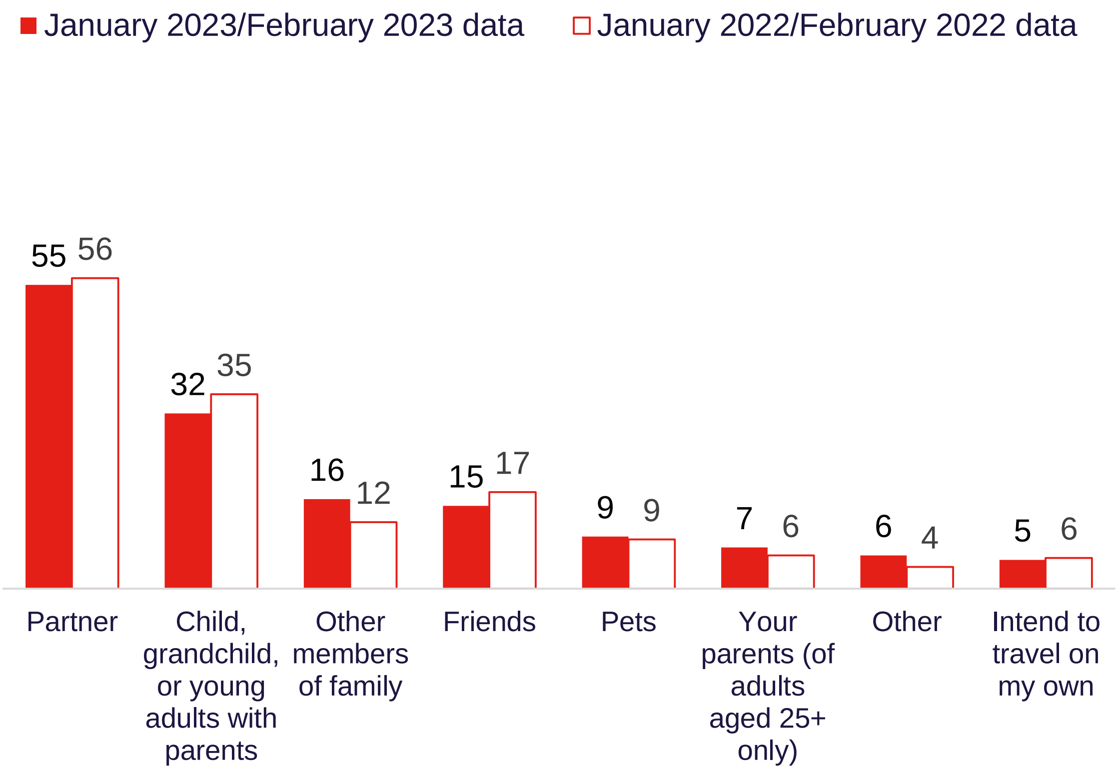


Figure 25. Visitor party make-up for trips taken from trip in April to June 2023, Percentage, January 2023 to February 2023, UK



Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

The top motivation for an overnight trip in both time periods is ‘family time or time with my partner’.

Figure 26. Motivations for UK holidays and short breaks in February-March 2023, Percentage, February 2023, UK, Full list

Figure 27. Motivations for UK holidays and short breaks in April-June 2023, Percentage, February 2023, UK, Full list

Question: VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All February respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 188, April to June 2023 n =484.
Note: Multiple choice question. Totals may exceed 100%.

In both time periods, ‘trying local food and drink’ and ‘walking, hiking’ are the top activities.

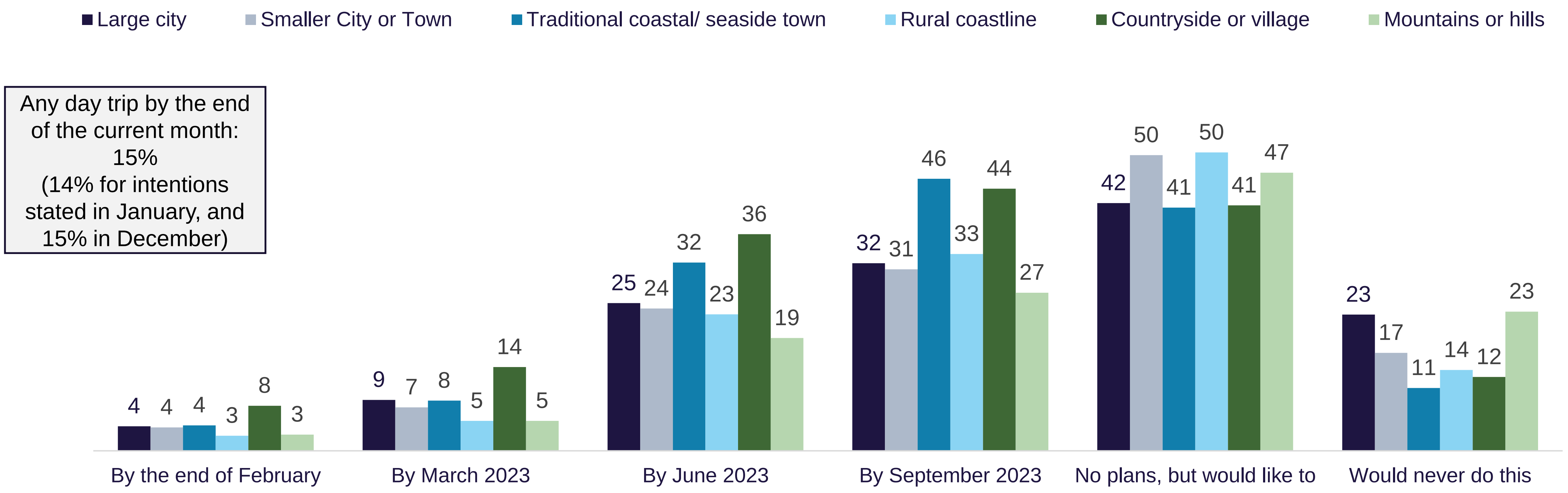
Figure 28. Activities for UK holidays and short breaks, in February-March 2023, Percentage, February 2023, UK, Full list

Figure 29. Activities for UK holidays and short breaks in April-June 2023, Percentage, February 2023, 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 February respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 188, April to June 2023 n =484.
Note: Multiple choice question. Totals may exceed 100%.

In the first week of February, 15% of UK adults intend to take any day trip by the end of the month. 'Countryside or village' is the top day trip destination for the next 6 months.

Figure 30. Next UK day trip intention between January 2023 and September 2023, Cumulative percentages, February 2023, UK

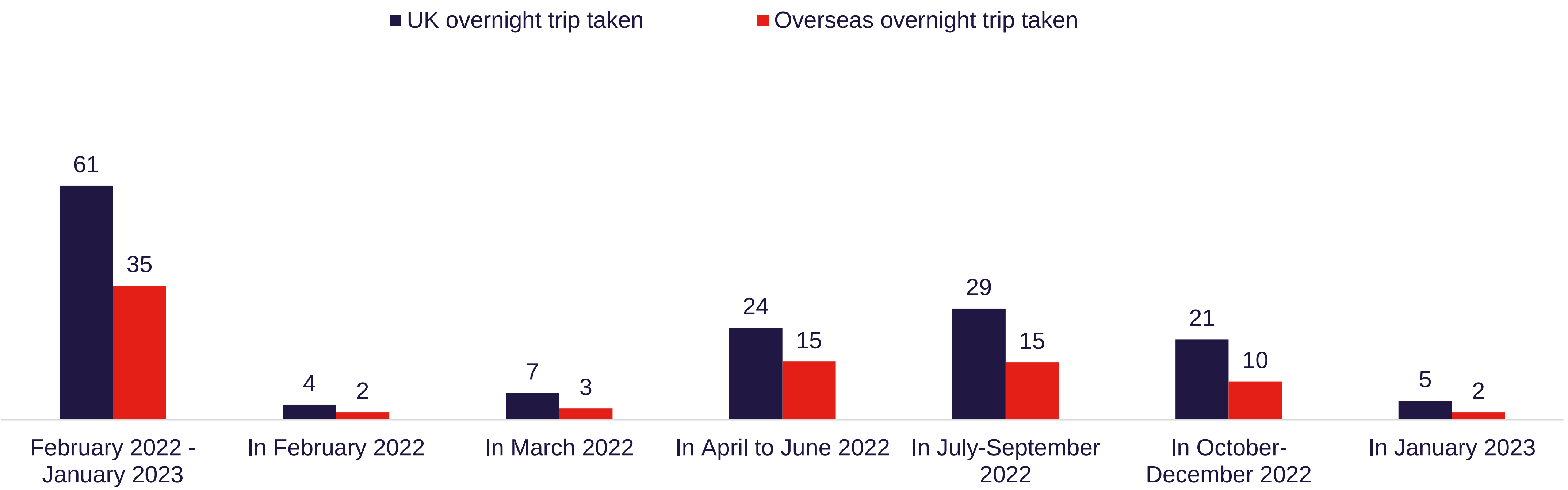


Question: VB16a. When are you next likely to take a day trip to the following types of places? Please select just the next occasion for each type of destination.
Base: February 2023 = 1,757

4. Past UK and Overseas Trips

Around 3 in 5 (61%) have taken a UK overnight trip between February 2022 and January 2023, while only 35% have taken an overseas overnight trip in that period.

Figure 31. Proportion taken an overnight UK or overseas trip in below time period, Percentage, February 2023, UK



Question: VB13a/f. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. February 2023 = 1,757.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

The North West of England (16%) and London (15%) were the most popular destination for trips in the past three months. 36% say they stayed with / visited friends or relatives.

Figure 32. Destination of overnight trips taken in UK in the past three months, Percentage, February 2023, UK

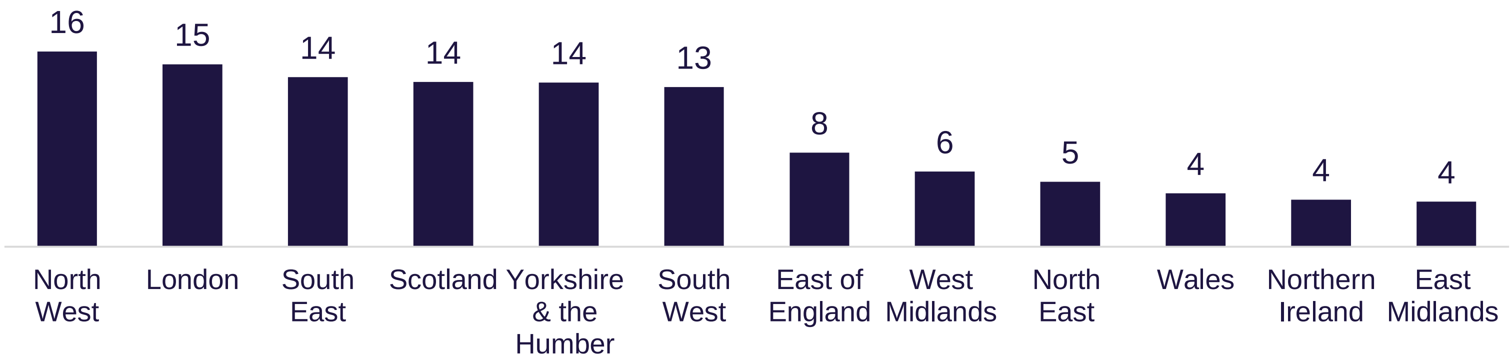
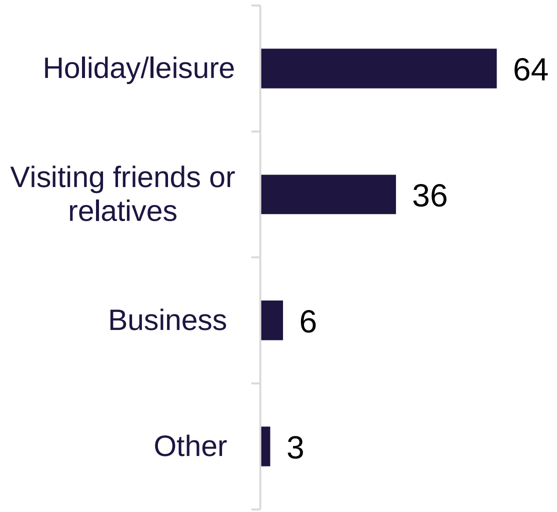


Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, February 2023, UK



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 February 2023 respondents that took an overnight trips in the last three months n= 281.
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose

5. Overnight Business Trip Intentions (January 2023 data)

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

16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Team building’ is the leading reason (31%), followed by ‘meeting 6 or more people’ (at 27%).

Figure 34. Proportion anticipating an overnight business trip in next 3 months, Percentage, January 2023, UK adults in employment

80% of UK adults interviewed are in employment

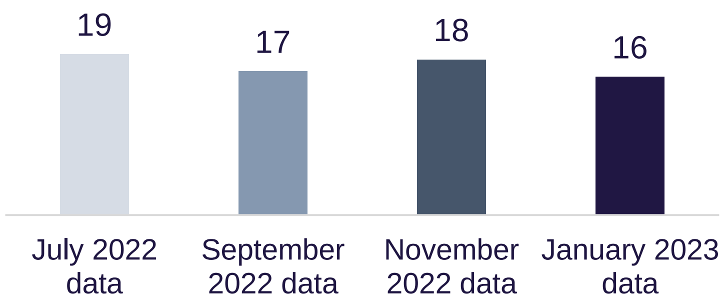
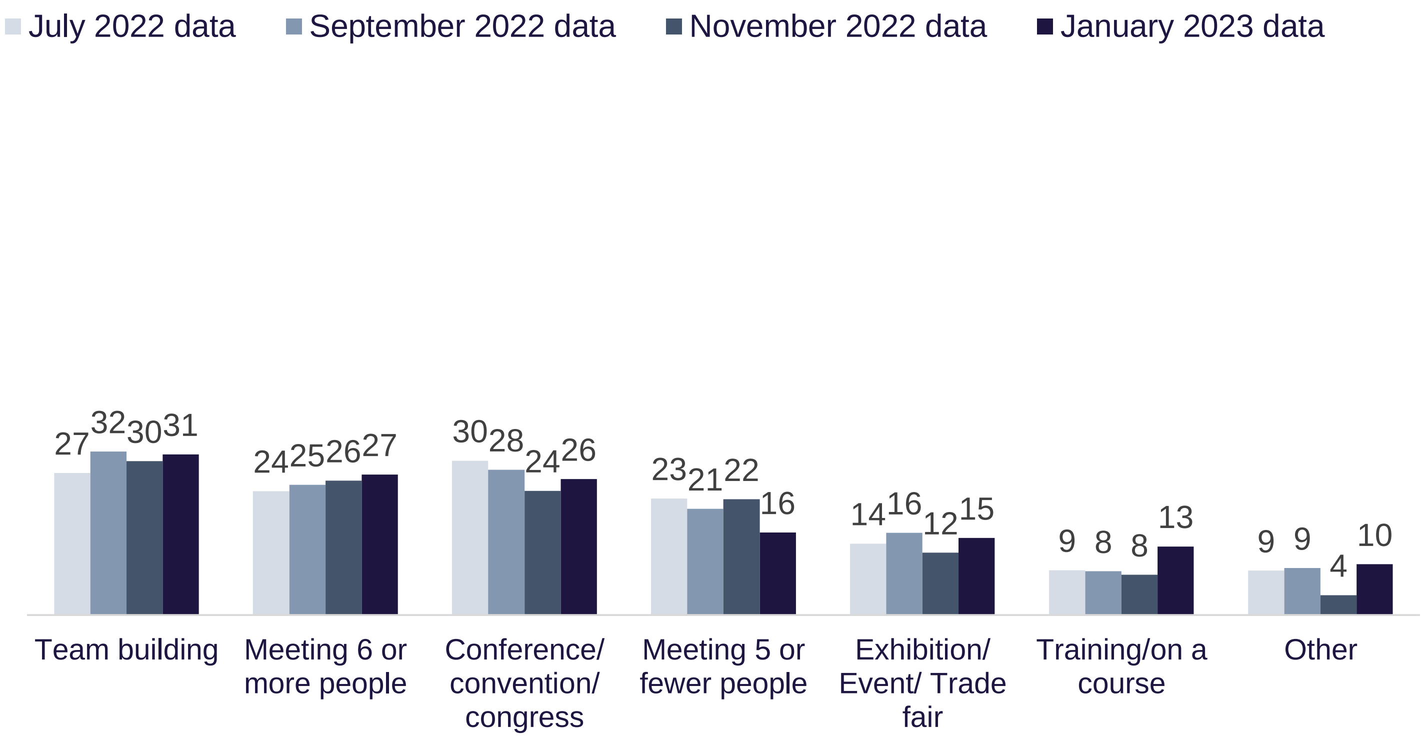


Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, January 2023, UK adults in employment planning a trip



Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer ‘no’. Please also answer ‘no’ if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office).Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.
VB14b: What would be the main reason for this overnight business trip? Base: January 2023 respondents currently in employment n = 1,271. All taking a business trip n=237.

Methodology & Further Data

Methodology

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

PLEASE NOTE:

- The current 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.