Domestic Sentiment Tracker: March 2023

Published: March 2023

Fieldwork Period: 1st to 7th March 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 March 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.

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

March 2023: Scorecard of Key Metrics

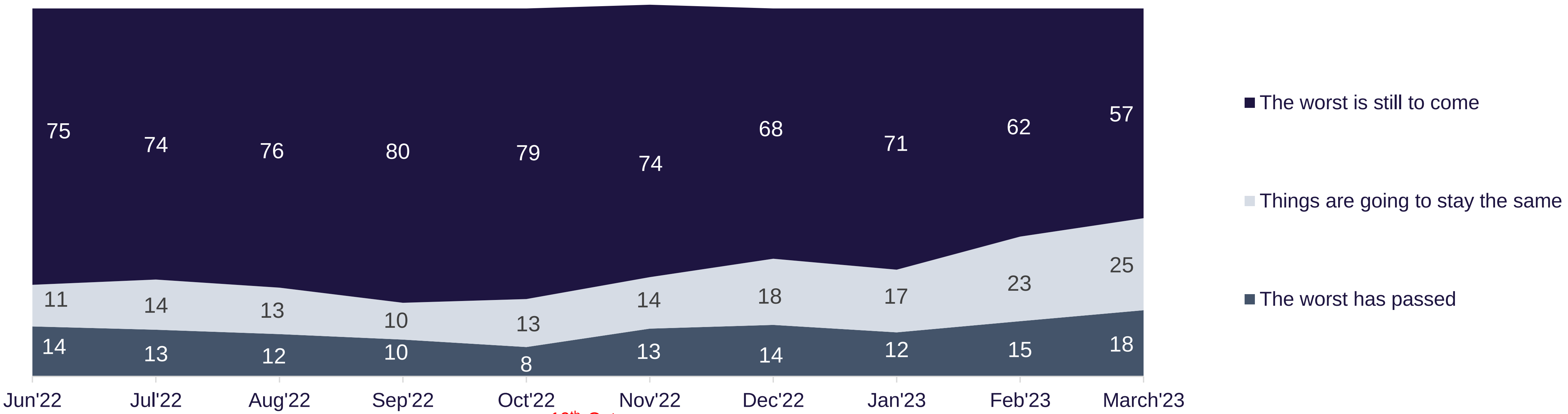
Key Metrics	March 2023	Change since February 2023
% of UK adults stating 'WORST IS STILL TO COME' in regard to cost of living crisis	57%	-5%*
Proportion intending a UK overnight trip at any point in the next 12 months	73%	+1%
Proportion intending an overseas overnight trip at any point in the next 12 months	54%	+3%
Preference for UK over overseas in the next 6 months (vs pre-pandemic)	33%	-3%
Took a domestic overnight trip in the past 12 months (March 2022 – Feb 2023)	57%	-4%*
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	3%	-1%
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-15%	+5%*
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	29%	-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

The proportion that think 'the worst has passed' in relation to the cost of living crisis has increased for the second consecutive wave

Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, 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 UK's new prime minister

16th Nov: UK inflation up to 11.1%, 41-year high

14th Dec: UK inflation eases to 10.7% but remains close to 41-year high

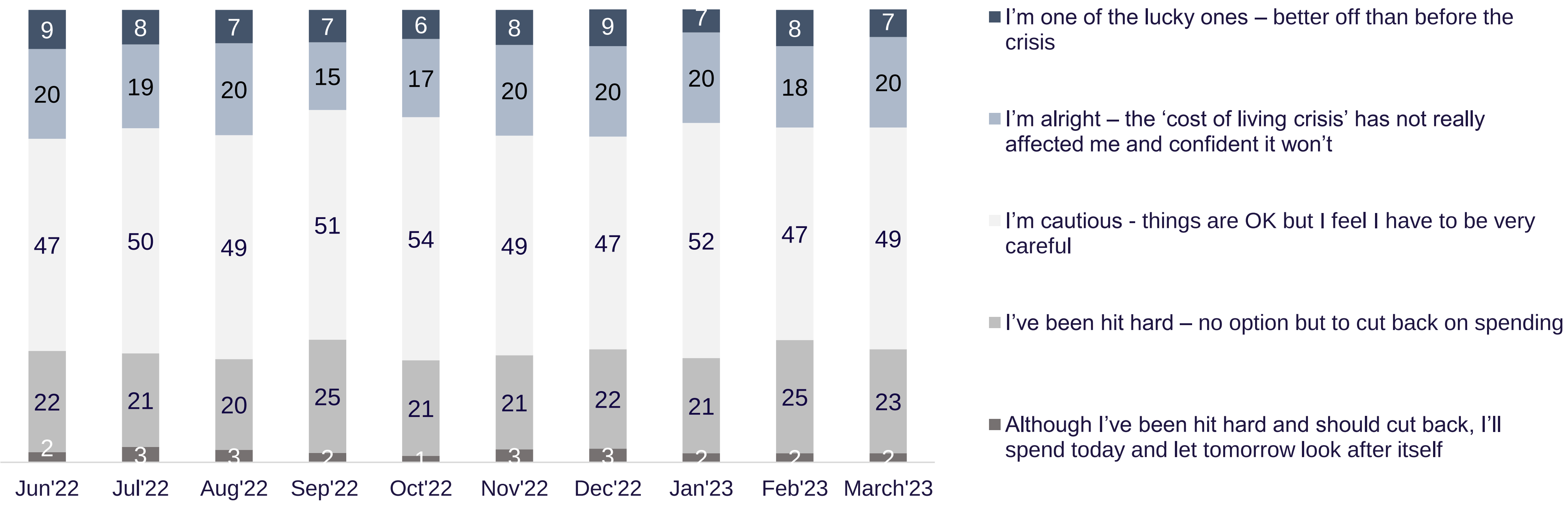
18th Jan: UK inflation eases to 10.5%; 2nd Feb: Bank of England expects recession 'to be shorter and less severe'

15th Feb: UK inflation eases to 10.1%

Question: Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. March 2023 = 1,755

The majority of UK adults (72%) are either 'cautious and being very careful' (49%) or have been 'hit hard and are cutting back' (23%) due to the cost of living crisis

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

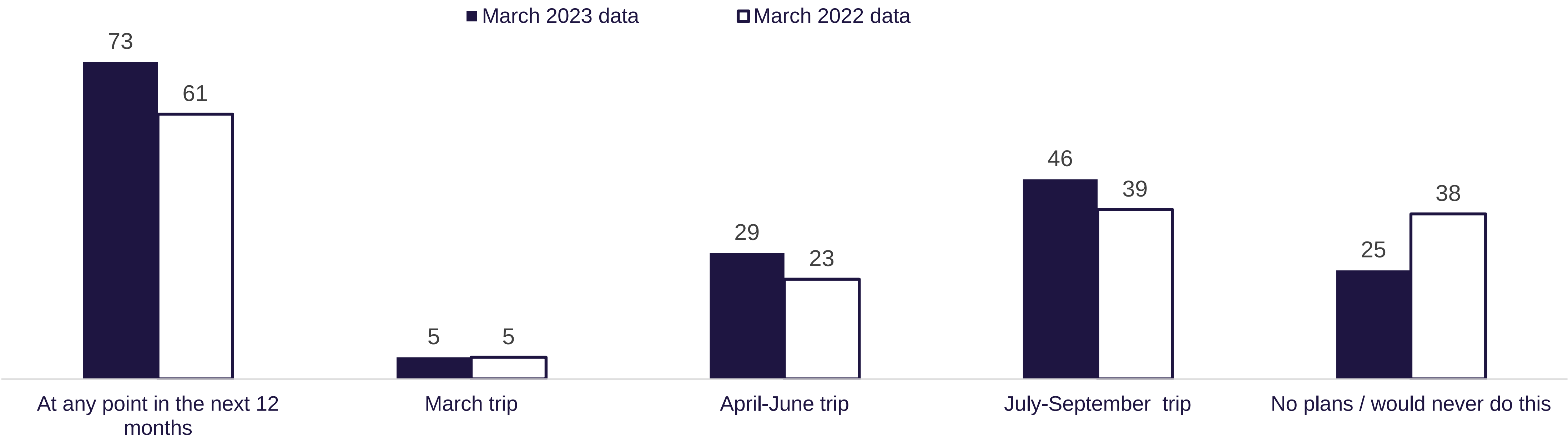


Question: Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. March 2023 = 1,755.

2. Trip Intentions: UK and Overseas

Overnight domestic trip intentions are above the levels anticipated back in March 2022, 73% planning a trip in the next 12 months compared to 61% a year earlier

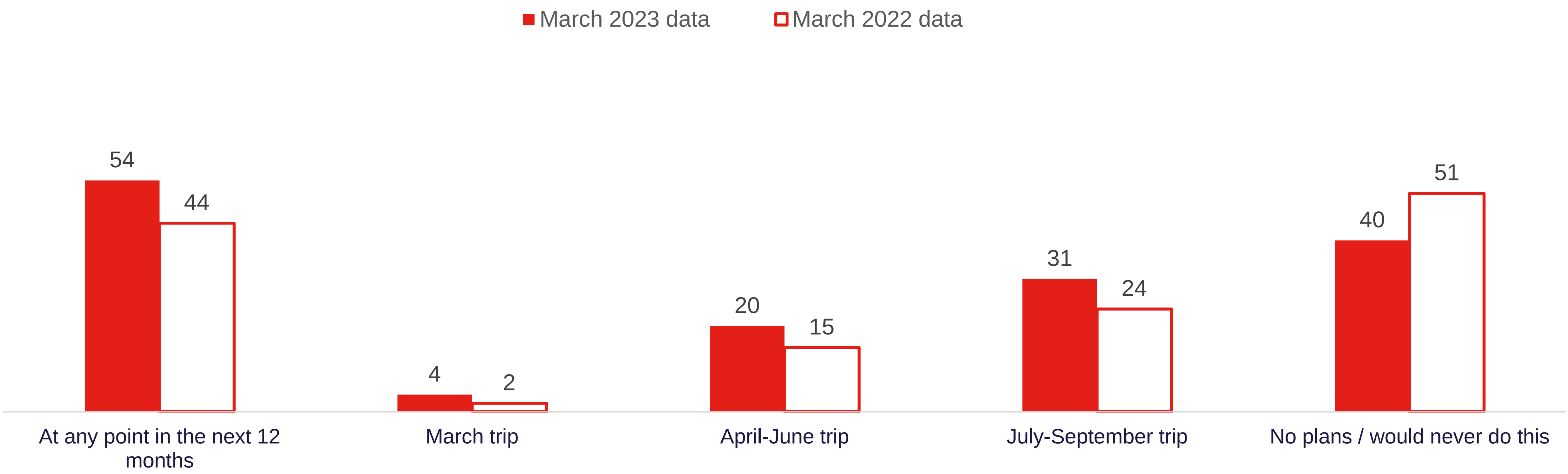
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, March 2023, UK



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. March 2022 = 1,756, March 2023 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

For <u>overnight overseas trips</u>, intentions are also much higher than in March 2022, in particular between July and September

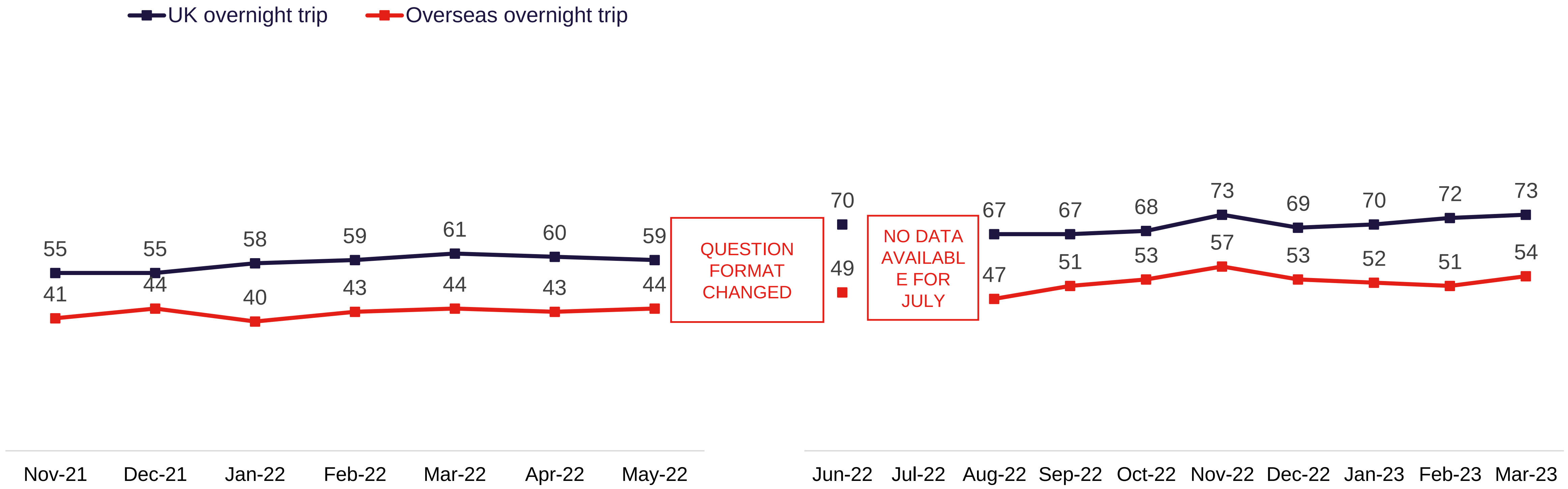
Figure 5b. Proportion anticipating going on <u>any</u> overnight overseas trips, Percentage, March 2023, UK



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. March 2022 = 1,756, March 2023 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Both long term domestic and overseas overnight trip intentions have steadily increased since December 2022

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, March 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. March 2023 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

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

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

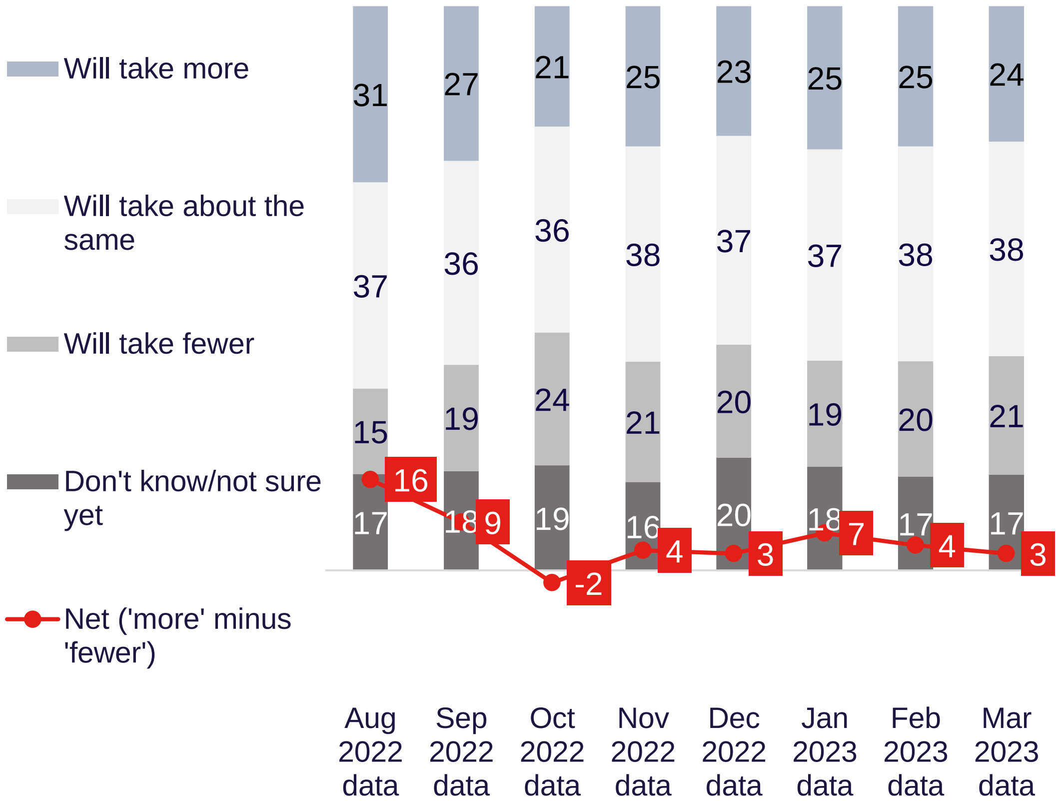
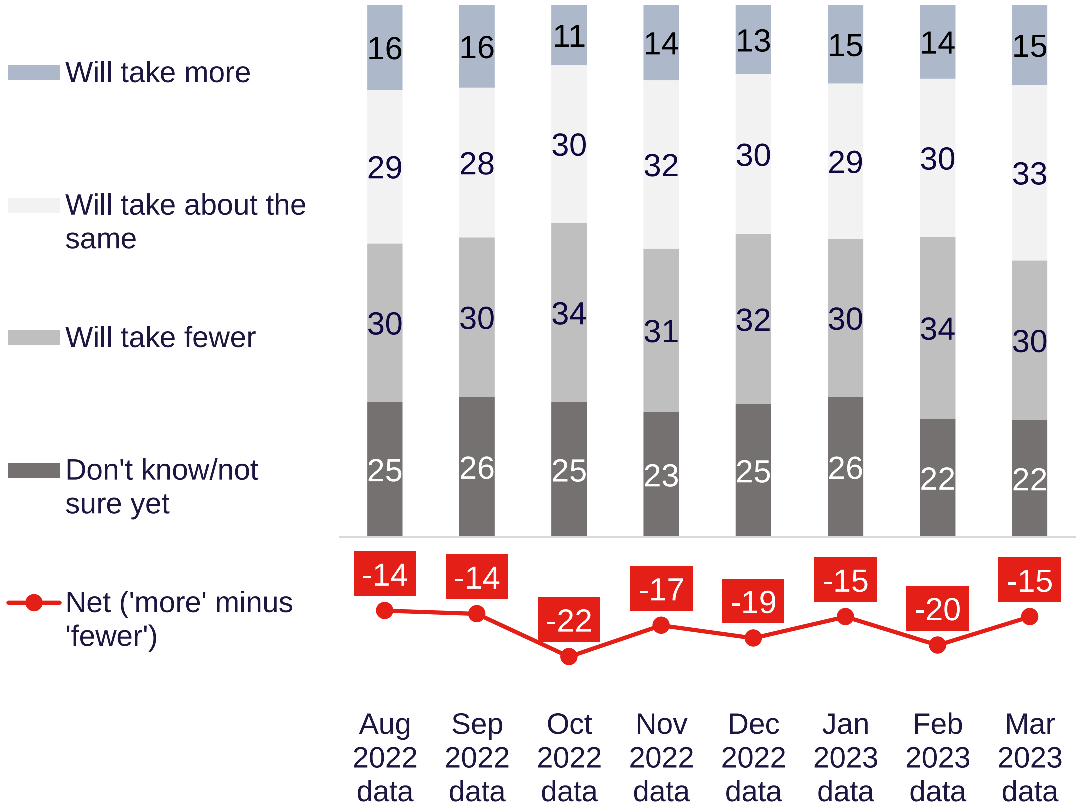


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, March 2023, UK



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. March 2023 = 1,755.

33% 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’ (56%)

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

<u>TOP 5 reasons for UK preference</u>

1. UK holidays are easier to plan (56%)
2. UK holidays are cheaper (49%)
3. Shorter / quicker travel (39%)
4. To avoid long queues at airports/cancelled flights (31%)
5. I want to take holidays in places I am familiar with (30%)

<u>TOP 5 reasons for Overseas preference</u>

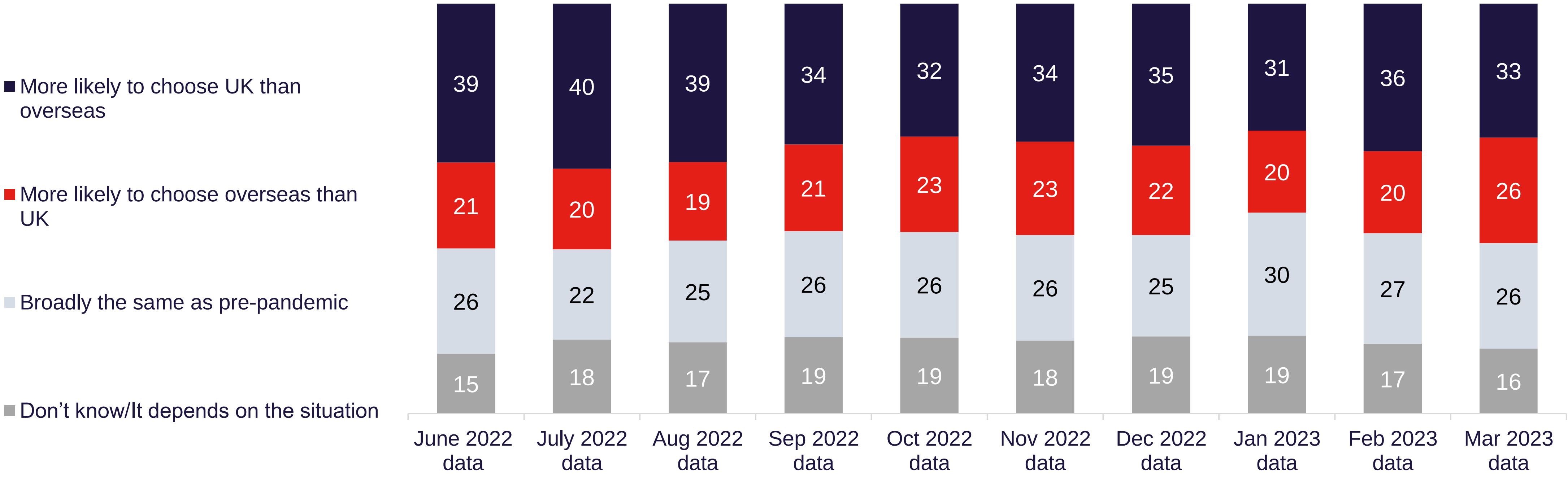
1. Better weather (45%)
2. I want to visit new places (41%)
3. I want to explore other cultures (35%)
4. I’m prioritising overseas trips after missing out during the pandemic (25%)
5. Overseas holidays are cheaper (23%)

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. March 2023 = 1,755. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? March 2023 = 588, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? March 2023 = 437

The proportion more likely to choose an overseas trip than a domestic trip is at its highest since June 2022

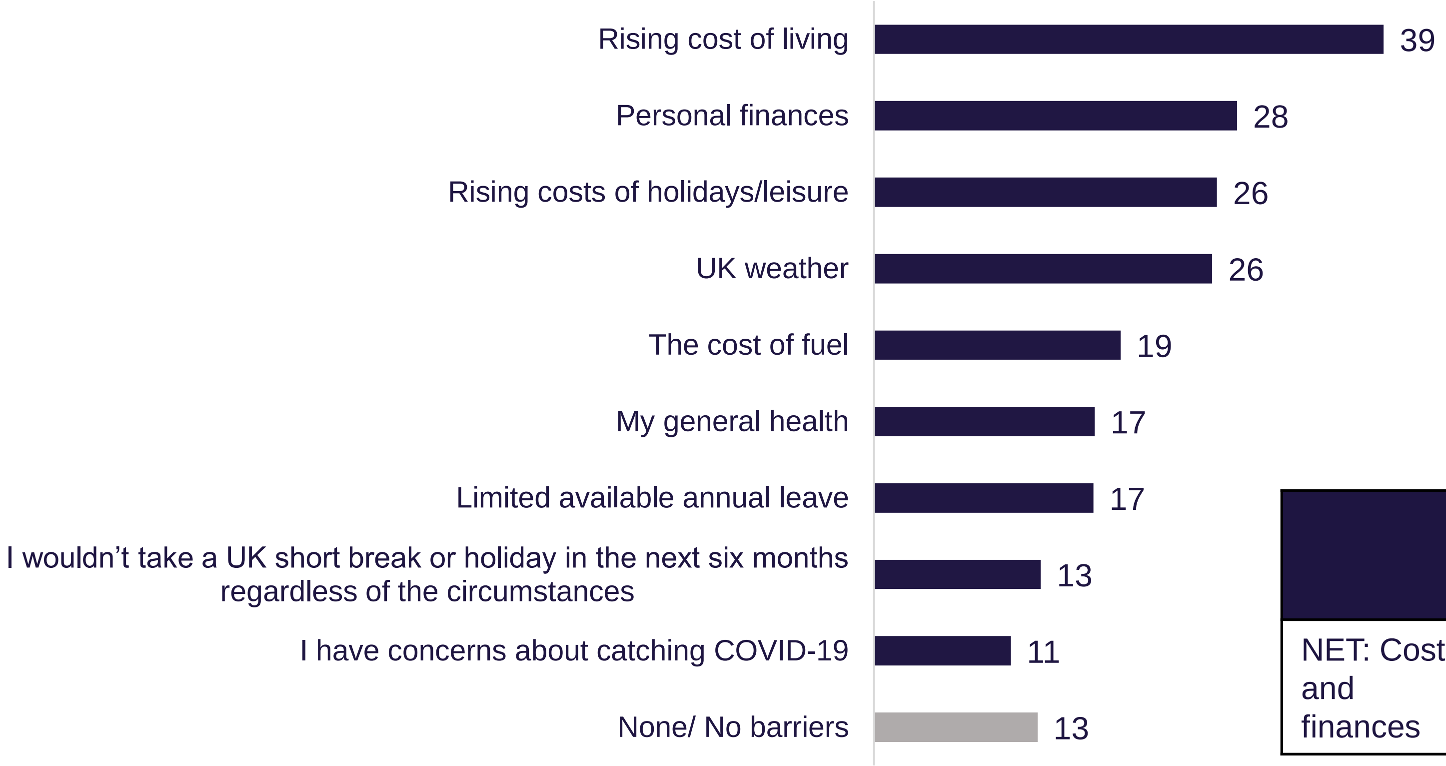
Figure 9b. Preference for UK vs overseas short break/holidays in the next 6 months, compared to pre-pandemic, Percentage, March 2023, UK



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. March 2023 = 1,755.

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, March 2023, UK



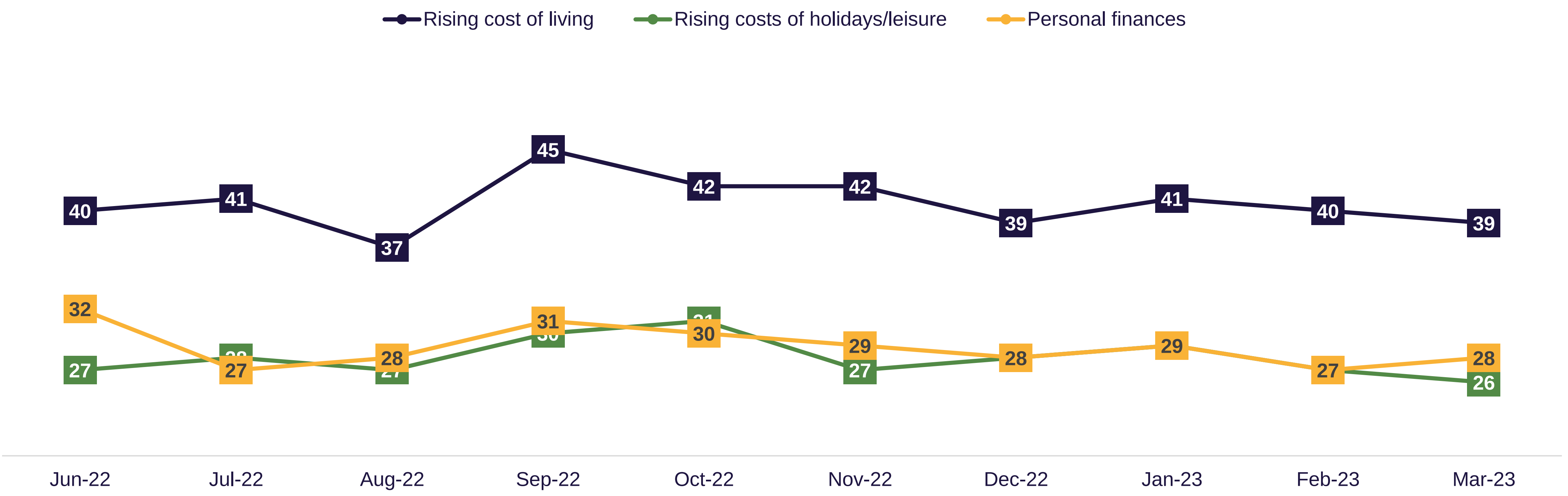
	December 2022 data	January 2023 data	February 2023 data	March 2023 data
NET: Costs and finances	57%	58%	59%	59%

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. March 2023 = 1,755. *NET: Cost and finances includes ‘rising cost of living’, ‘personal finances’, ‘the cost of fuel’, ‘rising costs of holidays/leisure’ and ‘difficulty getting money back if a trip is cancelled’

The rising cost of living has consistently been the biggest financial barrier to taking an overnight domestic trip

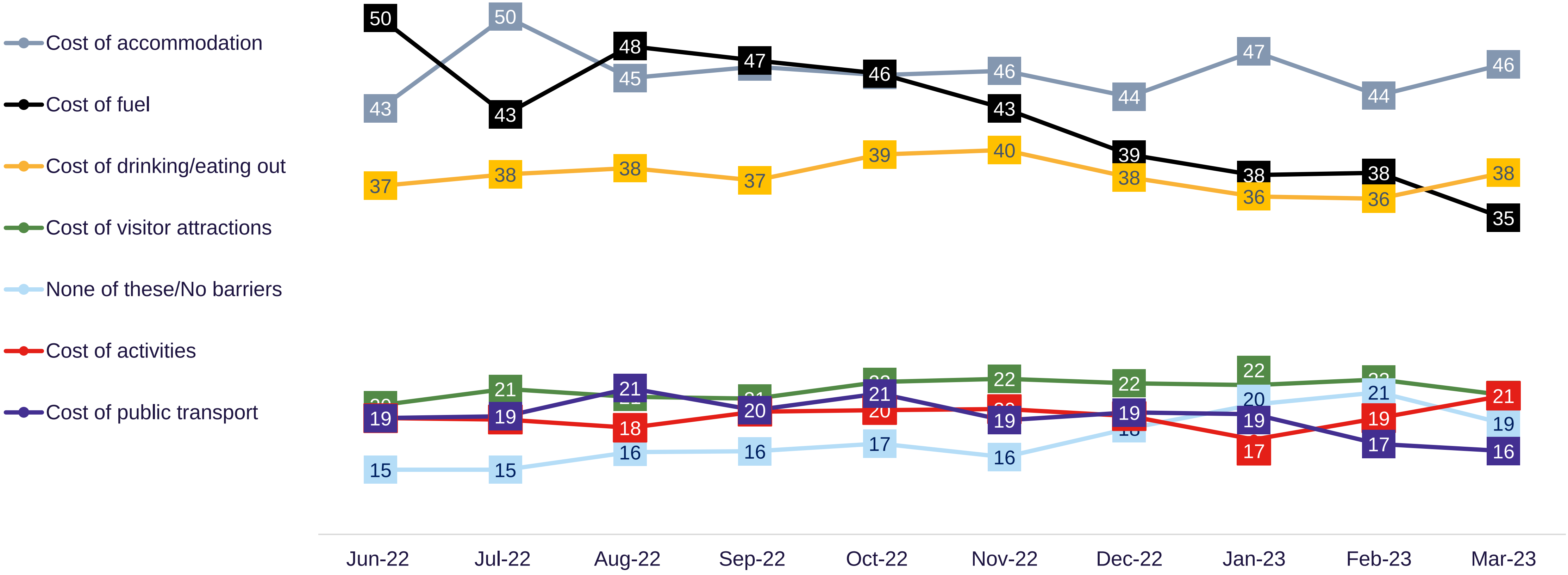
Figure 10b. <u>Perceived financial barriers</u> to an overnight trip in the UK in <u>next 6 months</u>, Wave-on-wave, Percentage, UK



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. March 2023 = 1,755.

Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of accommodation remains at the top, now followed by cost drinking/eating out. The cost of fuel continues to decline as a barrier

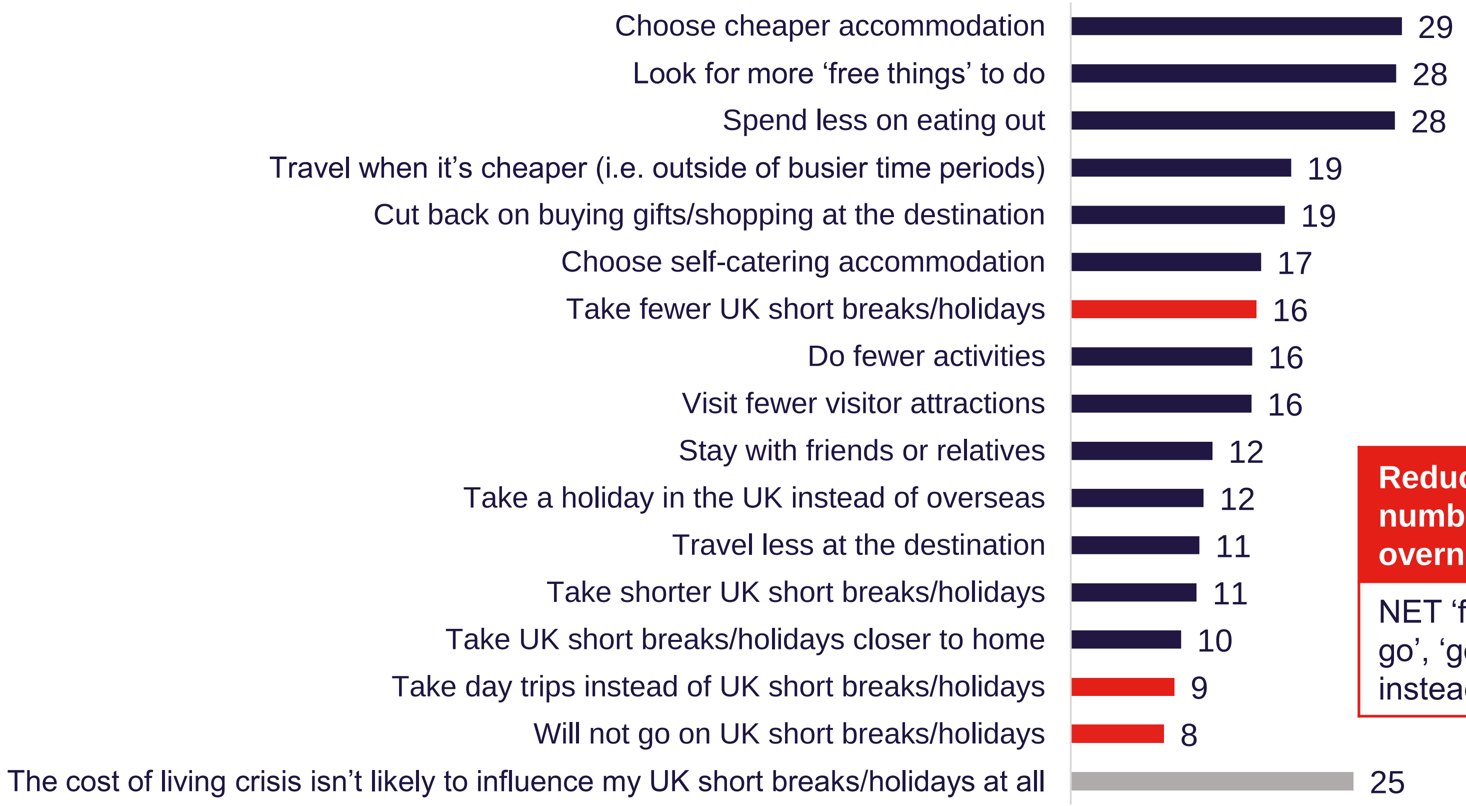
Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Wave-on-wave, Percentage, UK



Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: March 2023 = 1755.

UK adults plan to cut their <u>overnight trip spending</u> mainly on accommodation, activities and eating out. 29% will cut the number of trips, in line with data from the previous three waves

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



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

Question: VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?
Base: March 2023 = 1755.

In terms of UK day trips, 28% of UK adults intend to look for more free things to do. 34% will reduce the number of day trips – in line with the last two waves

Figure 13b. ‘Cost of living’ impact on day trips, Percentage, March 2023, UK, Full list

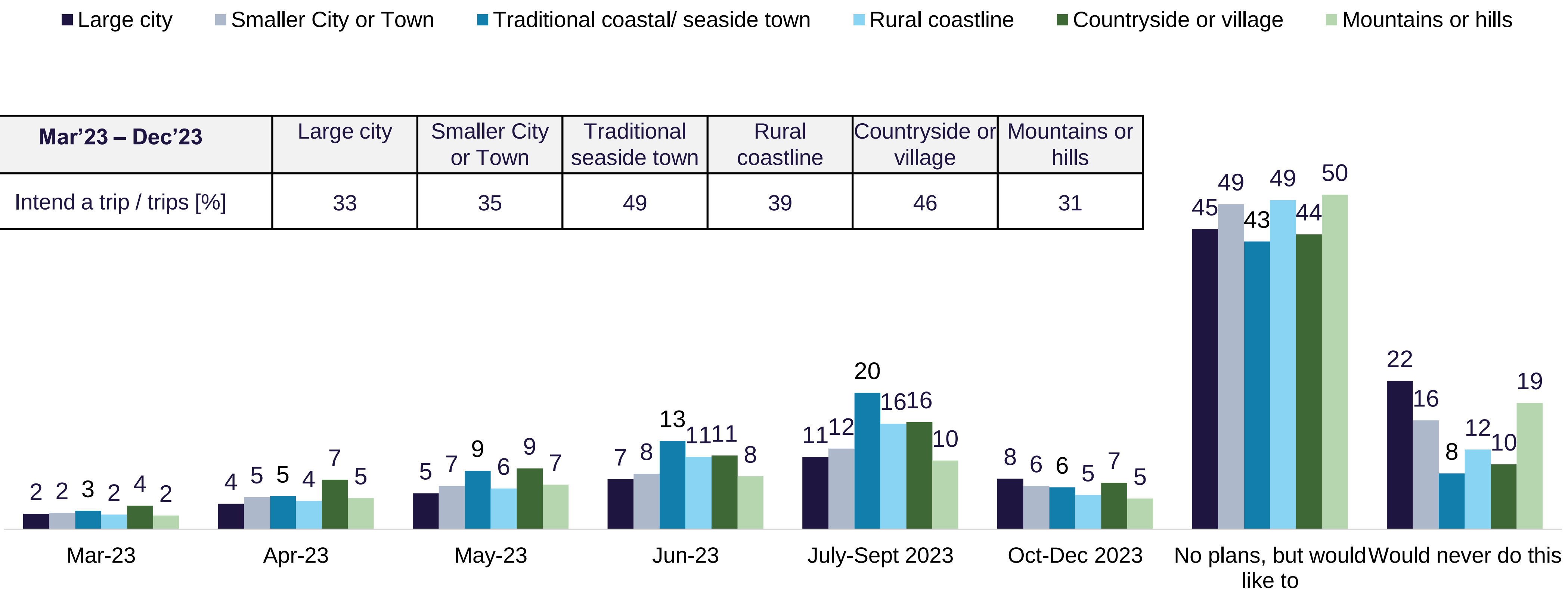
Reduce the number of day trips	December 2022 data	January 2023 data	February 2023 data	March 2023 data
NET ‘fewer’, ‘not go on day trips’	36%	34%	34%	34%

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: March 2023 = 1755.

The top destination type for an overnight domestic trip up to May 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, March 2023, UK

Mar’23 – Dec’23	Large city	Smaller City or Town	Traditional seaside town	Rural coastline	Countryside or village	Mountains or hills
Intend a trip / trips [%]	33	35	49	39	46	31

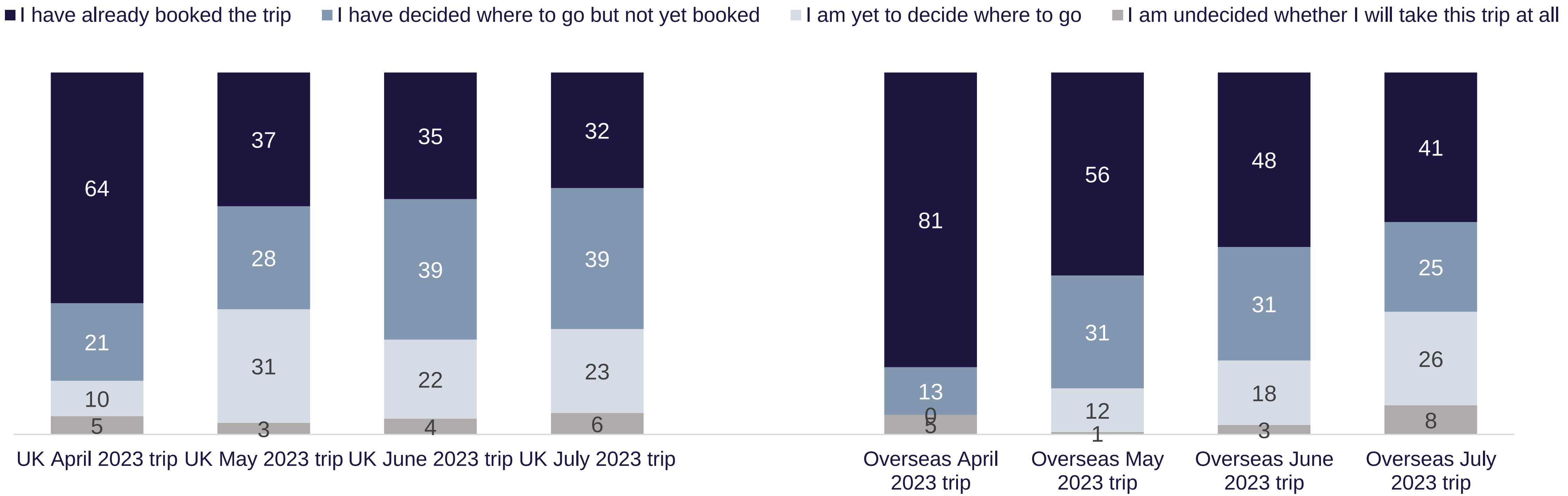


Question: VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Please select all possible occasions, not just the next one. Base: March 2023 = 1,755.

3. The Next Trip: Overnight and Day Trips

64% of UK adults have already booked their domestic trips for April, while 81% have already booked their overseas trips for that month

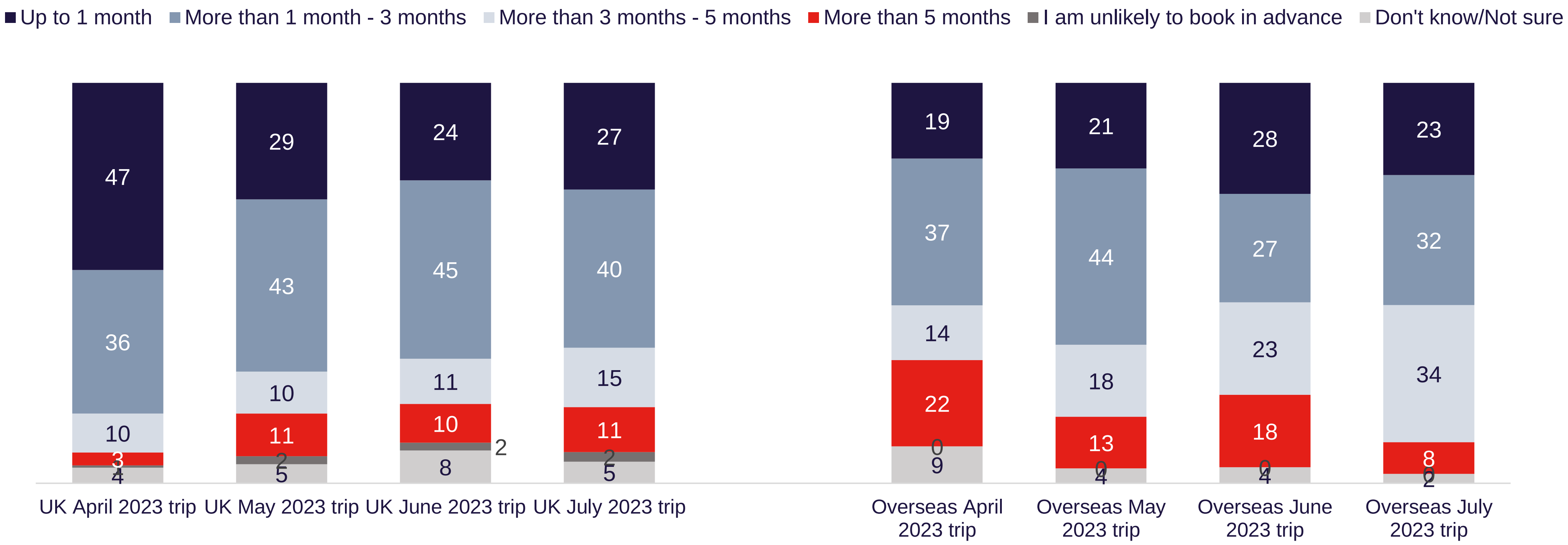
Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, March 2023, UK



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: April 2023 n = 135, May 2023 n = 160, June 2023 n = 173, July 2023 n = 223. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: April 2023 n = 53, May 2023 n = 117, June 2023 n = 132, July 2023 n = 141

Domestic April trips are more likely to be booked within a month of going, while this is 1 to 3 months ahead for overseas April trips

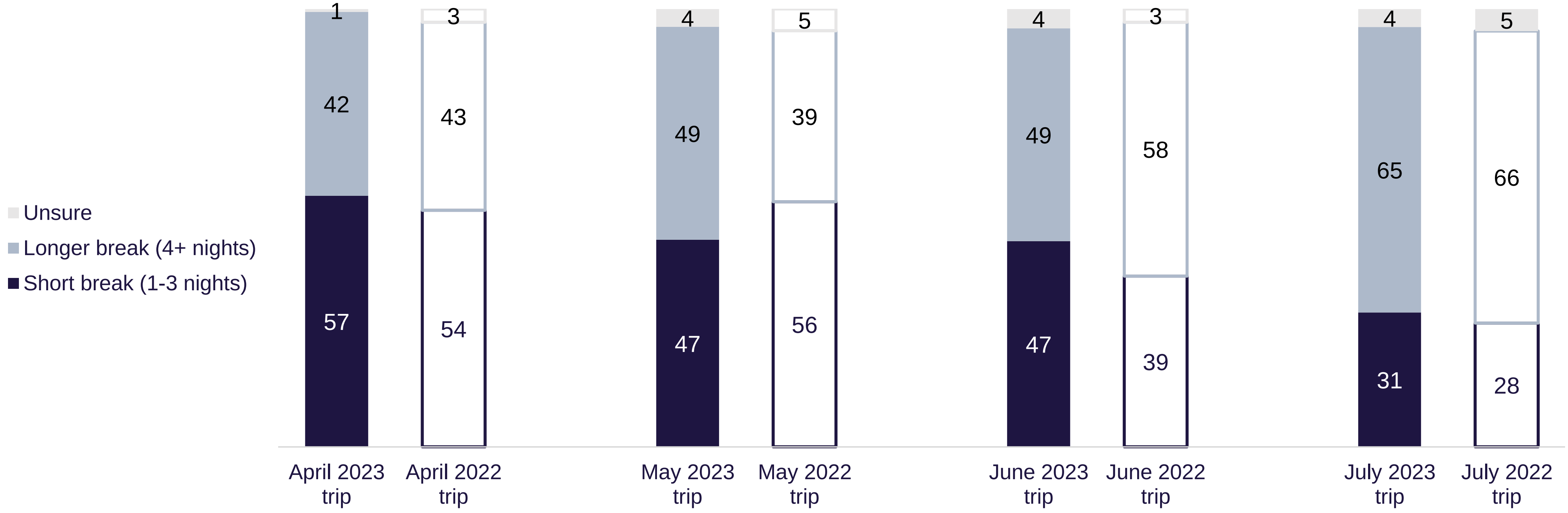
Figure 16. Time between booking the next UK and overseas overnight trip and first day of that trip, Percentage, March 2023, UK



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: UK trip: April 2023 n = 135, May 2023 n = 160, June 2023 n = 173, July 2023 n = 223. 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: April 2023 n = 53, May 2023 n = 117, June 2023 n = 132, July 2023 n = 141

In April, short breaks are more common than longer breaks. In May and June, longer breaks are marginally more likely, with July dominated by longer trips

Figure 17. Length of next UK holiday or short break by time period, Percentage, March 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 March 2023 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: April 2023 n = 135, May 2023 n=160, June 2023 n=173, July 2023 n = 223. UK trip 2021-2022: April 2022 n = 123, May 2022 n=119, June 2022 n=129, July 2022 n = 137

The South West is the most preferred UK overnight destination in both time periods, consistent with intentions in 2022

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

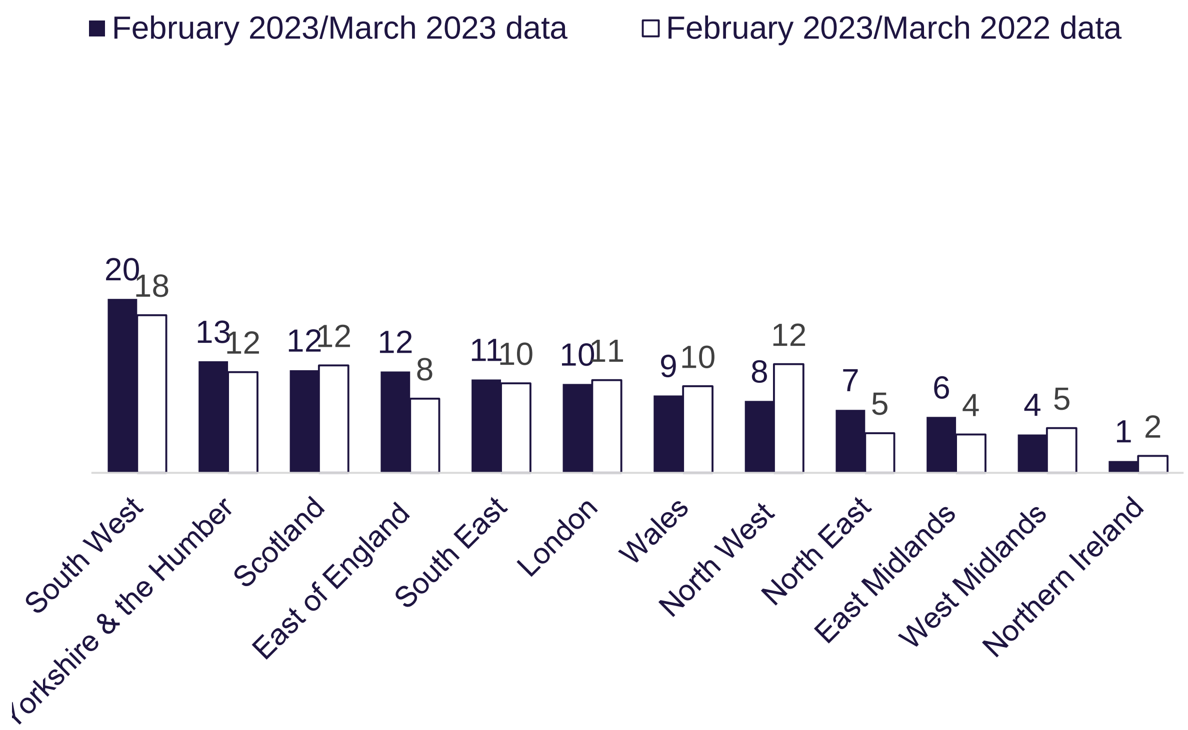
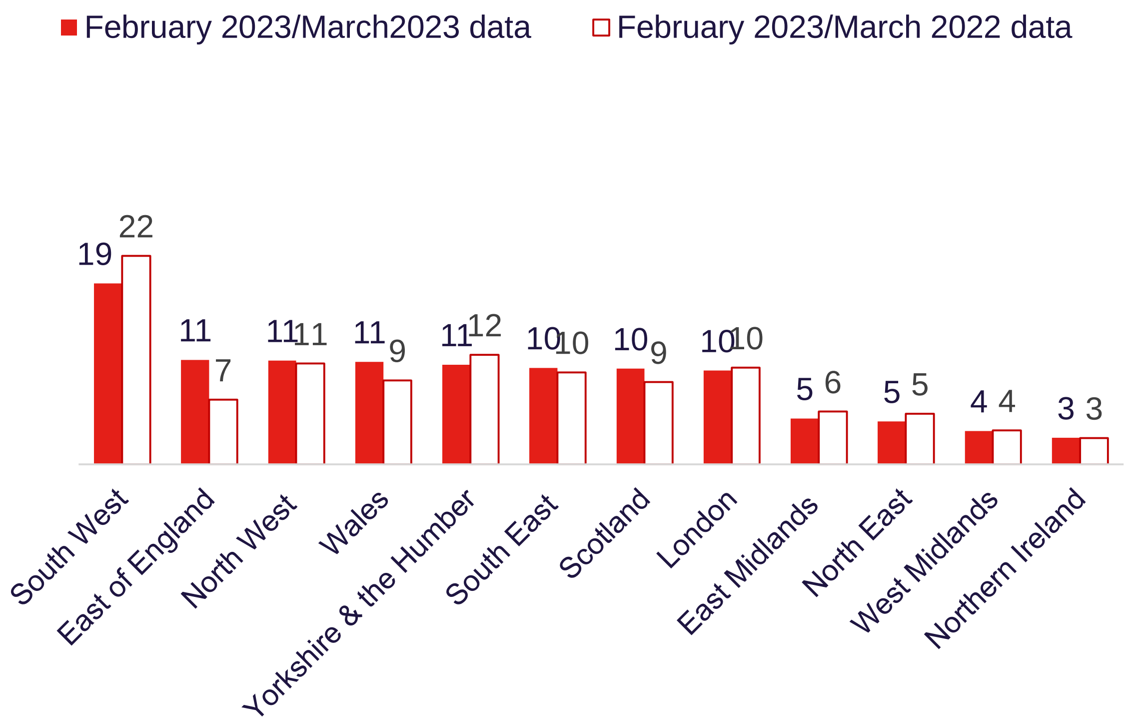


Figure 19. Where planning on staying on next UK overnight trip in July to September 2023, Percentage, February 2023 to March 2023, UK



Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952 July to September 2023 n =1014; April to June 2022 n = 743 July to September 2022 n =804. 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 – the latter slightly more likely than in 2022

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

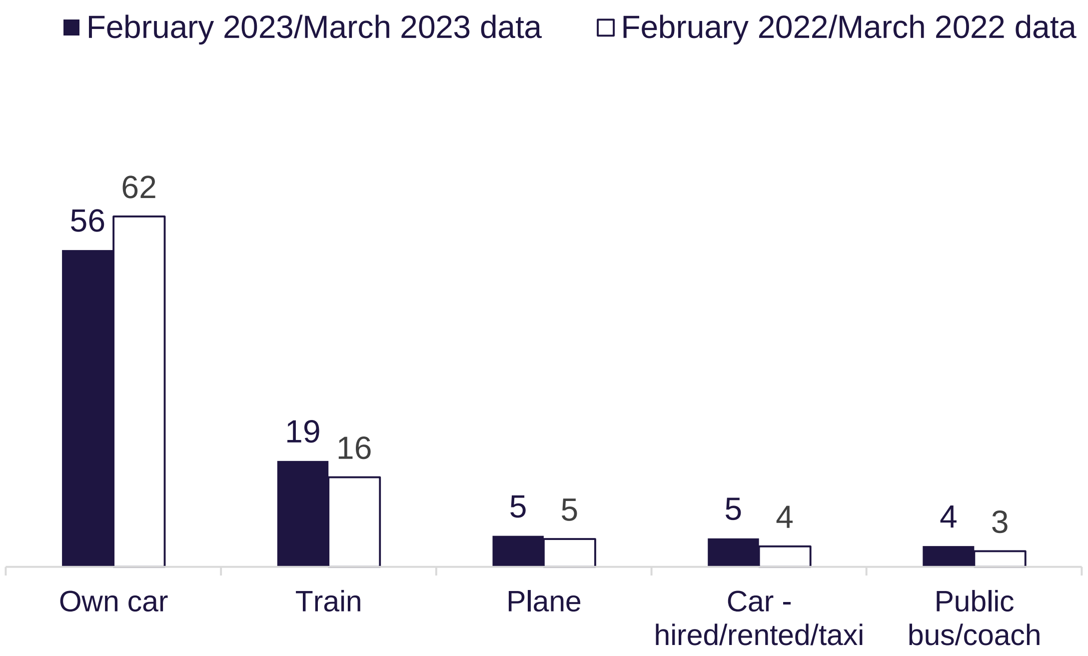
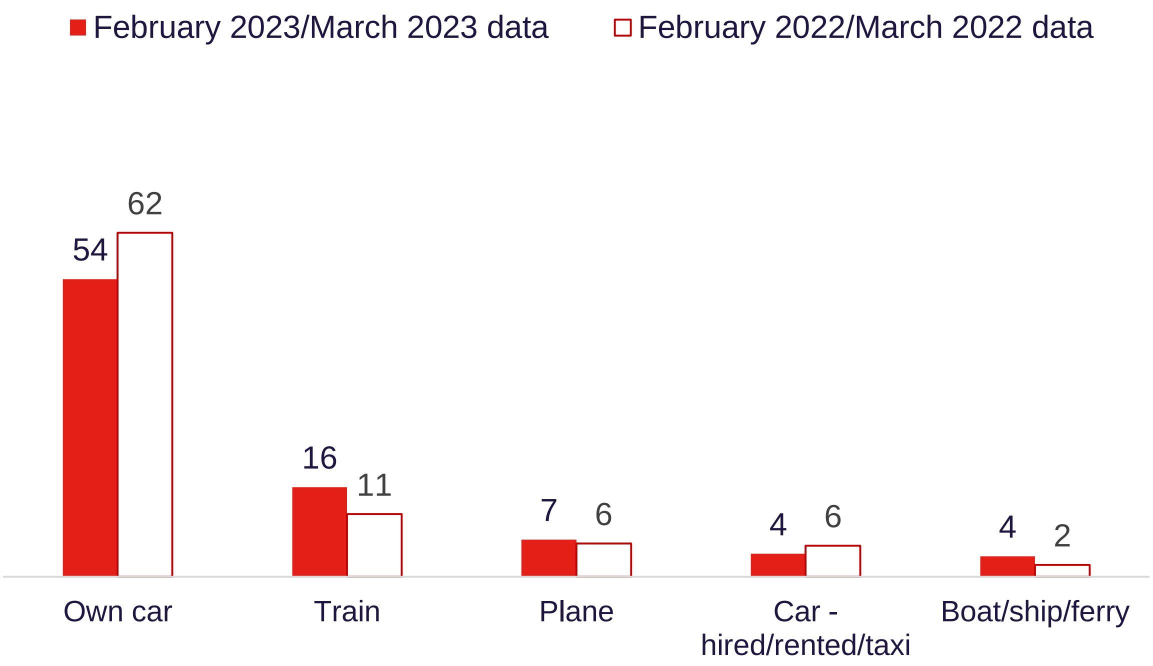


Figure 21. Top 5 main modes of travel to destination for overnight trip in July to September 2023, Percentage, February 2023 to March 2023, UK



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 February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1014; April to June 2022 n = 743, July to September 2022 n = 804

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 April to June 2023, Percentage, February 2023 to March 2023, UK

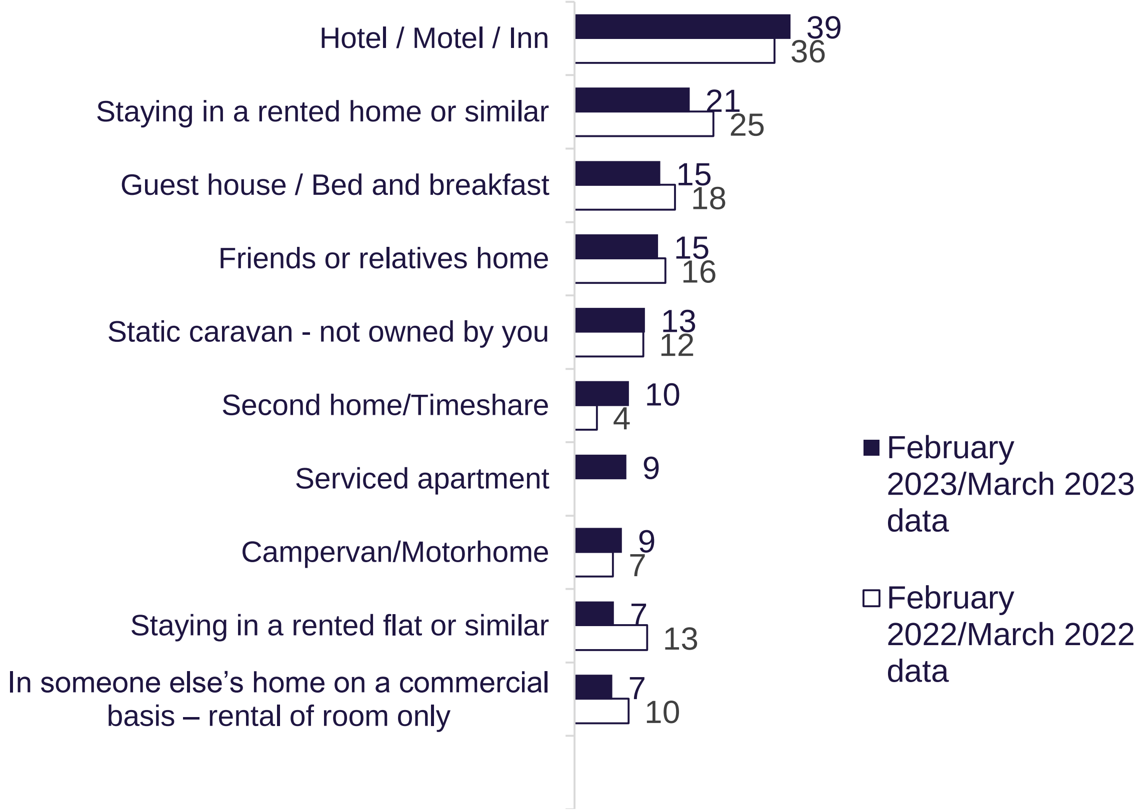
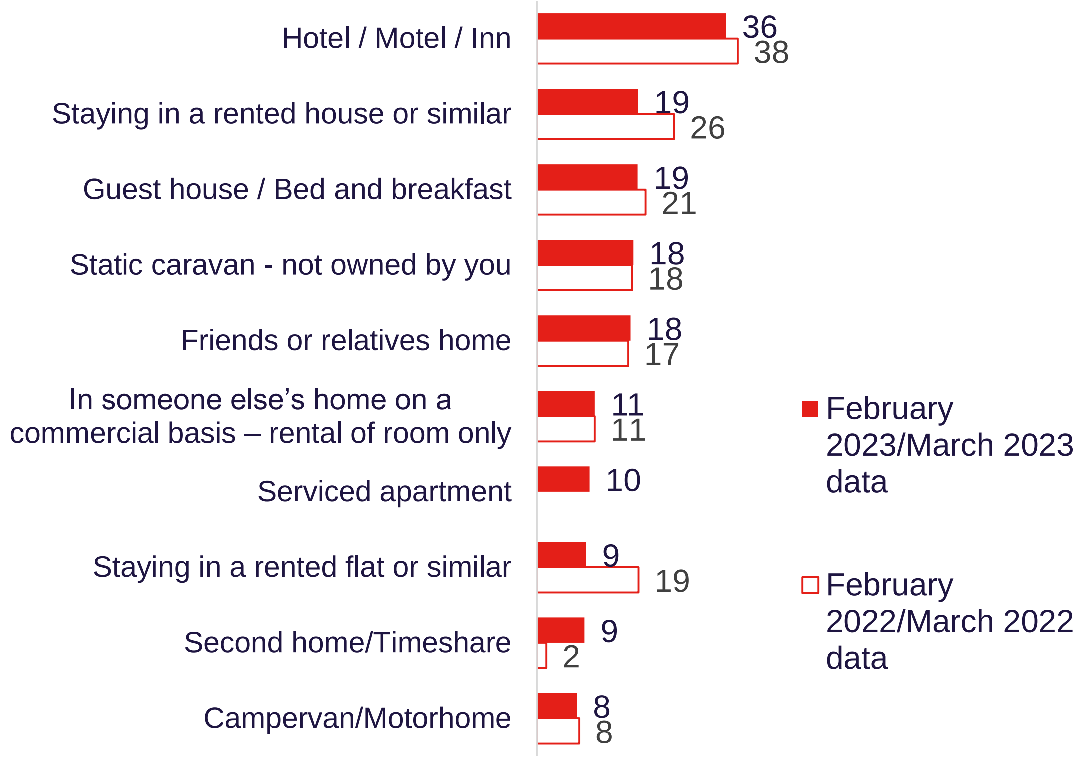


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in July to September 2023, Percentage, February 2023 to March 2023, UK



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 February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1014; April to June 2022 n = 743, July to September 2022 n = 804.

‘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 April to June 2023, Percentage, February 2023 to March 2023, UK

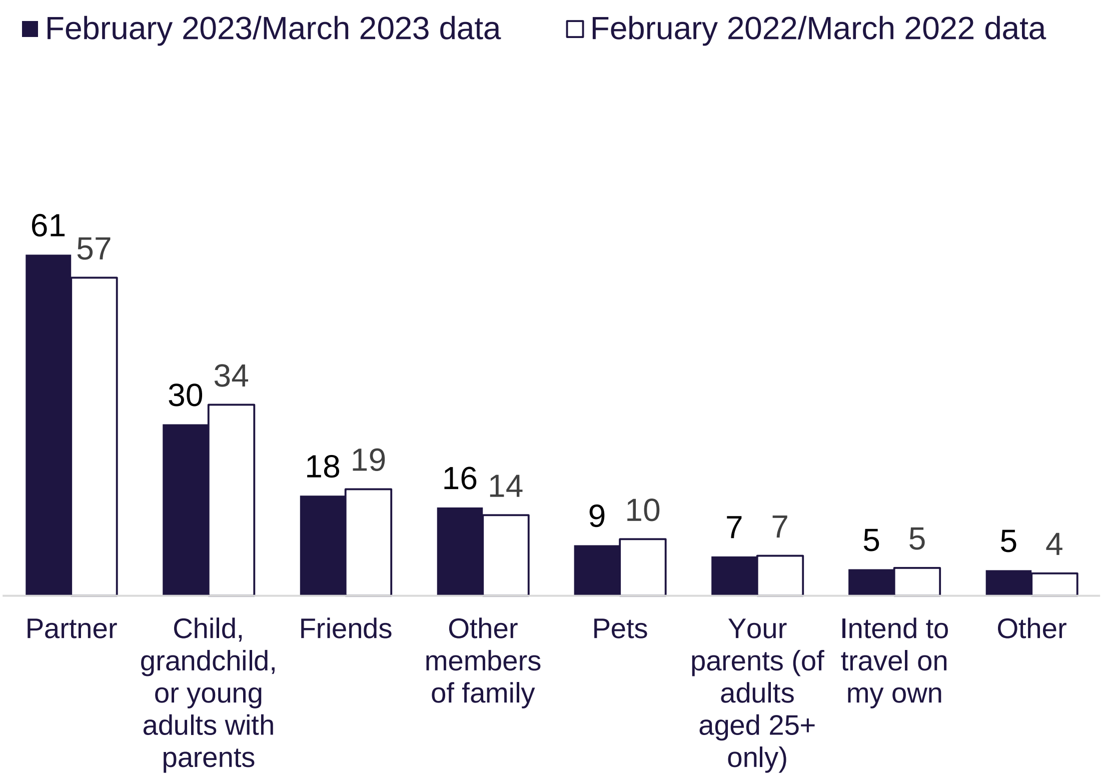
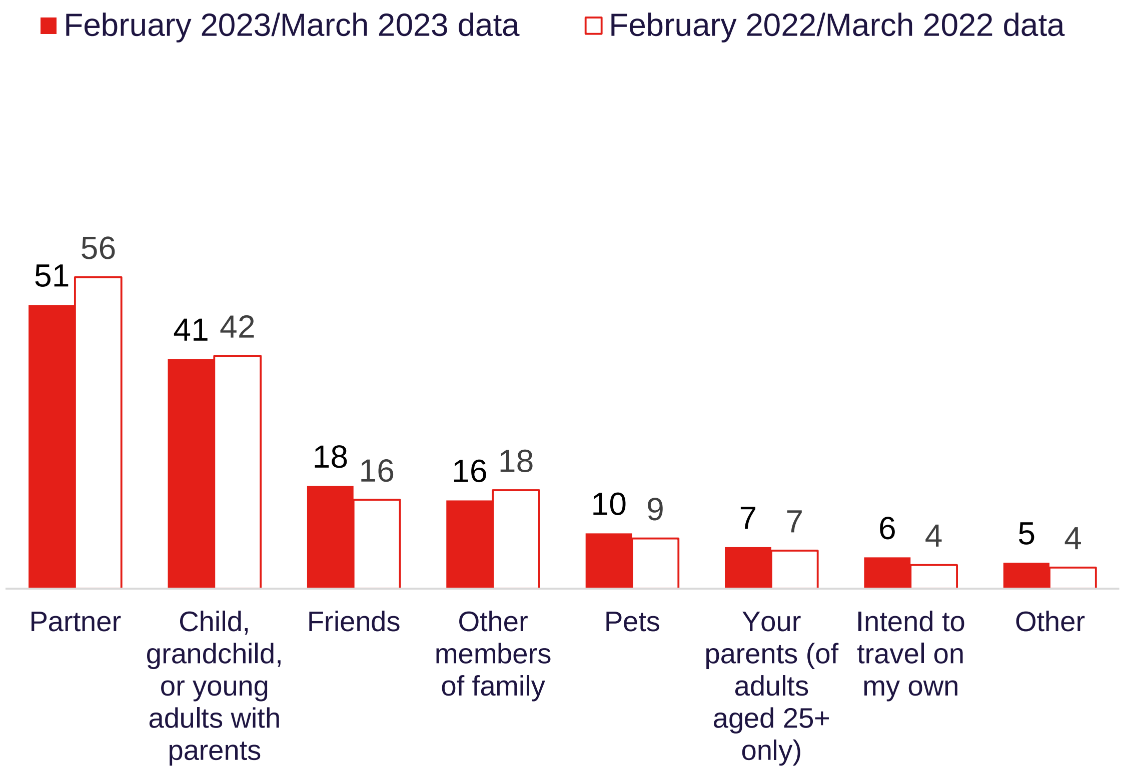


Figure 25. Visitor party make-up for trips taken from trip in July to September 2023, Percentage, February 2023 to March 2023, UK



Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1014; April to June 2022 n = 743, July to September 2022 n = 804. Totals may exceed 100% as some respondents anticipate a range of party types.

The top motivation for an overnight trip in April-June is 'family time or time with my partner', and in July-September it is 'to get away from it all and have a rest'

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

Figure 27. Motivations for UK holidays and short breaks in July-September 2023, Percentage, March 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 April to June 2023 n = 468, July to September 2023 n = 555.
Note: Multiple choice question. Totals may exceed 100%.

In April-June, ‘trying local food and drink’ is the top activity, while the top ones in July-September are ‘walking, hiking or rambling’ and ‘trying local food and drink’

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

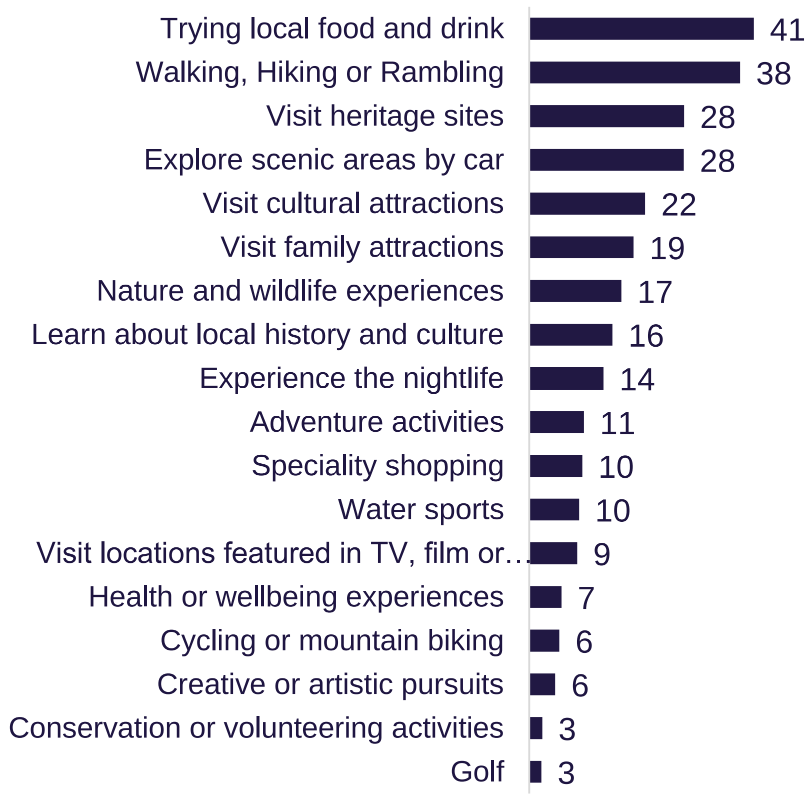


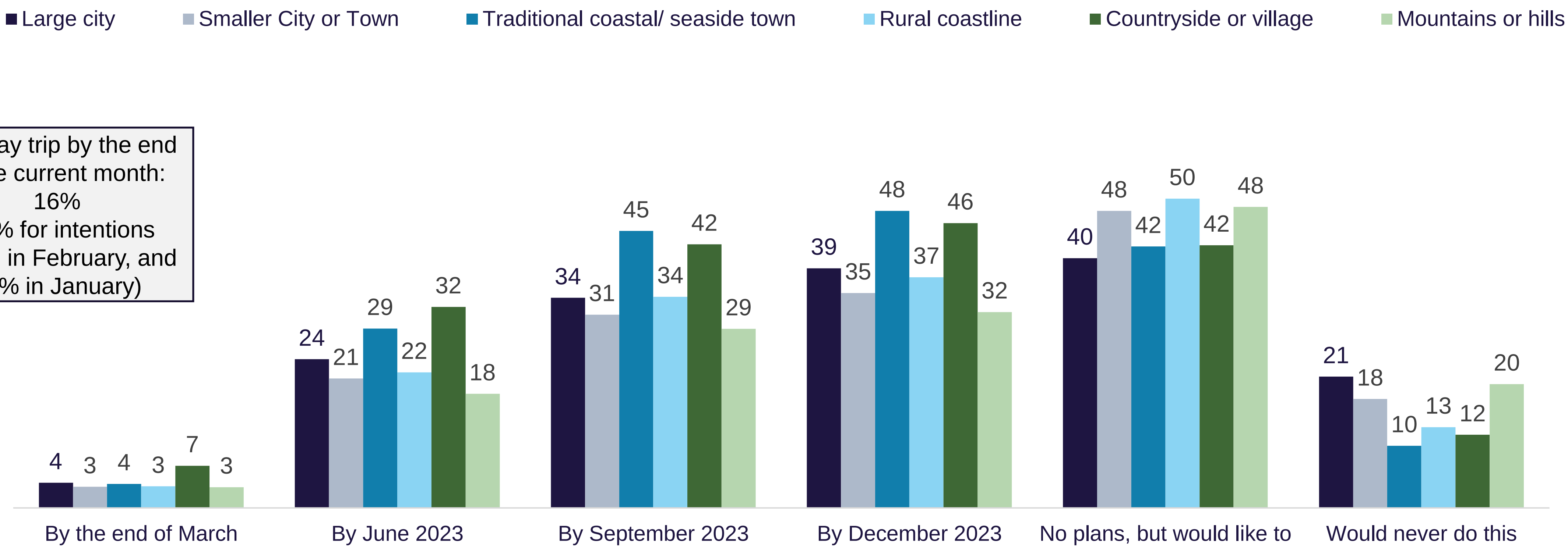
Figure 29. Activities for UK holidays and short breaks in July-September 2023, Percentage, March 2023, UK, Full list

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 April to June 2023 n = 468, July to September 2023 n = 555.
Note: Multiple choice question. Totals may exceed 100%.

16% of UK adults intend to take any day trip by the end of March. 'Countryside or village' is the top day trip destination until June. By September 2023 'traditional coastal town' leads

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

Any day trip by the end of the current month: 16%
(15% for intentions stated in February, and 14% in January)

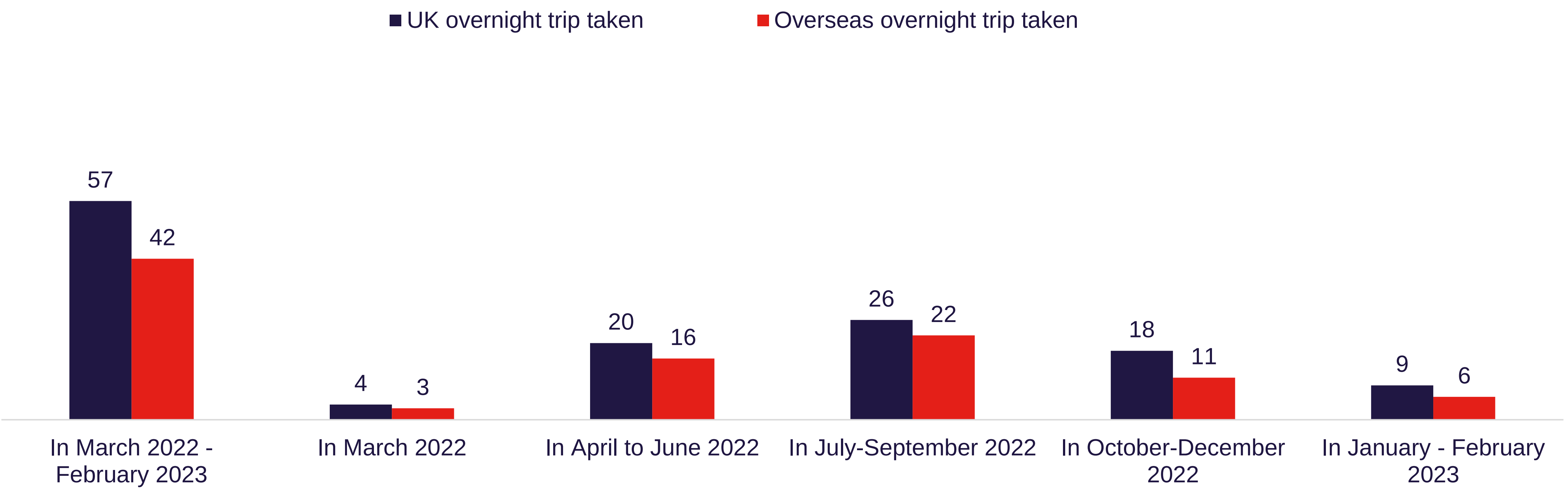


Question: VB16a. When are you next likely to take a day trip to the following types of places? Please select just the next occasion for each type of destination.
Base: March 2023 = 1,755

4. Past UK and Overseas Trips

Almost 3 in 5 (57%) have taken a UK overnight trip between March 2022 and February 2023, while 42% have taken an overseas overnight trip in that time period

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

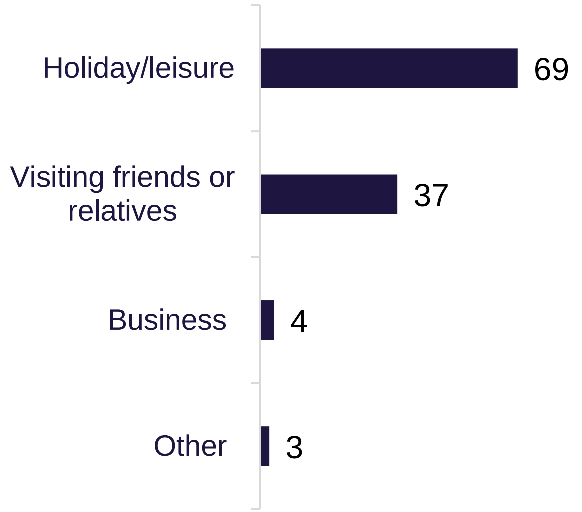


Question: VB13a/f. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. March 2023 = 1,755.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

London (20%) was the most popular destination for domestic trips in the past three months. The majority were for a proper holiday/leisure purpose

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

Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, March 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 March 2023 respondents that took an overnight trips in the last three months n= 263.
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose

5. Overnight Business Trip Intentions (March 2023 data)

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

20% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Conference’ is the leading reason (30%), followed by ‘team building’ (at 25%)

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

80% of UK adults interviewed are in employment

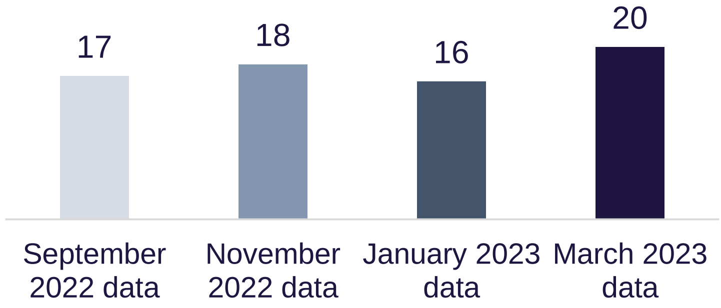
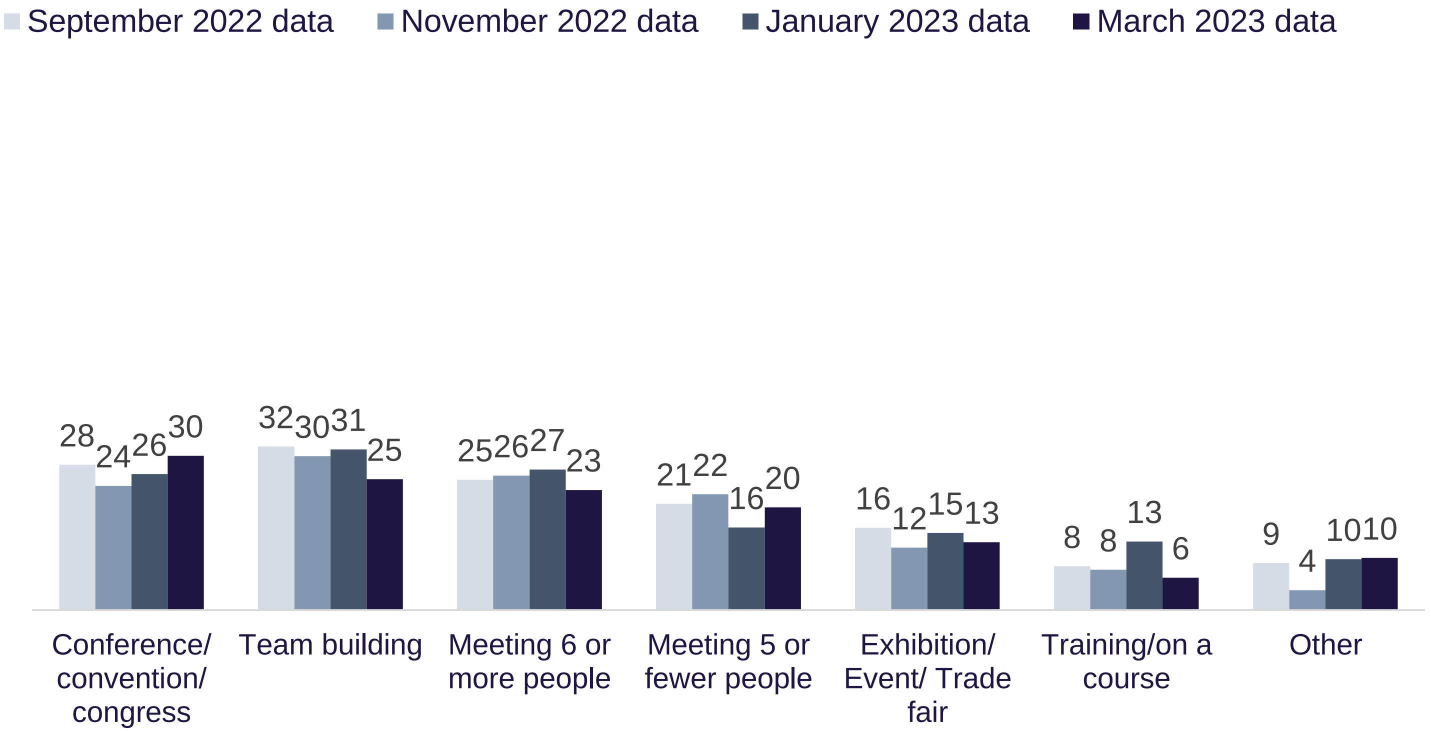


Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, March 2023, UK adults in employment planning a trip



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: March 2023 respondents currently in employment n = 1,341. All taking a business trip n=314.

Methodology & Further Data

Methodology

- This report presents findings from the March 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.