

Domestic Sentiment Tracker: March 2025

Published: 20th March 2025
Fieldwork Period: 3rd to 9th March 2025

UK Results

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

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Domestic Sentiment Tracker to understand the impact of major events, such as the cost of living crisis, on the UK public's intent to take overnight trips, both within the UK and abroad.
- The survey addresses areas, such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation for their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave's fieldwork was conducted between 3rd to 9th March 2025
- 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 2025 Intenders** : Residents of the UK who claim their next domestic overnight trip will take place between April to June 2025
- **July to September 2025 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between July to September 2025

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

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

March 2025: Scorecard of Key Metrics

Key Metrics	March 2025	Change since February 2025
% of UK adults stating 'WORST IS STILL TO COME' regarding the cost of living crisis	53%	+2%
Proportion intending a UK overnight trip at any point <u>in the next 12 months</u>	80%	-1%
Proportion intending an overseas overnight trip at any point <u>in the next 12 months</u>	63%	-3%*
Preference for UK over overseas in the next 12 months (vs past 12 months)	35%	+2%
Took a domestic overnight trip in the past 12 months (March 2024 – February 2025)	61%	-5%*
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	26%	+1%
Reduce the number of day trips due to cost of living crisis [NET 'fewer', 'not go on day trips']	26%	-1%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1 st UK weather; 2 nd Rising cost of living; 3 rd Personal Finances.	'Personal finances' enters top 3 over 'Rising costs of holidays/leisure'

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

March 2025: Scorecard of Key Themes

Key Theme	Question	March 2025	Change since February 2025
Accommodation	% of UK adults mentioning ' Cost of Accommodation ' as a barrier to taking UK holidays and short breaks in the next 6 months	40%	-4%*
	Top 3 accommodation types planning on staying in on next UK overnight trip in <u>April to June 2025</u> – % choosing ' Hotel / Motel / Inn '	43%	+2%
	Top 3 accommodation types planning on staying in on next UK overnight trip in <u>April to June 2025</u> – % choosing ' rented house or similar '	25%	=
	Top 3 accommodation types planning on staying in on next UK overnight trip in <u>April to June 2025</u> – % choosing ' Friends or relatives' home '	16%	=
Drinking/eating out	% of UK adults mentioning ' Cost of Drinking/Eating out ' as a barrier to taking UK holidays and short breaks in the next 6 months	31%	-2%
	Activities for UK holidays and short breaks in <u>April to June 2025</u> - % choosing ' Trying local food and drink '	41%	-2%
Attractions	% of UK adults mentioning ' Cost of Visitor Attraction ' as a barrier to taking UK holidays and short breaks in the next 6 months	18%	+1%
	Activities for UK holidays and short breaks in <u>April to June 2025</u> - % choosing to ' Visit heritage sites '	28%	-3%*
	Activities for UK holidays and short breaks in <u>April to June 2025</u> - % choosing to ' Visit cultural attractions '	22%	-6%*
	Activities for UK holidays and short breaks <u>April to June 2025</u> - % choosing to ' Visit family attractions '	16%	-2%

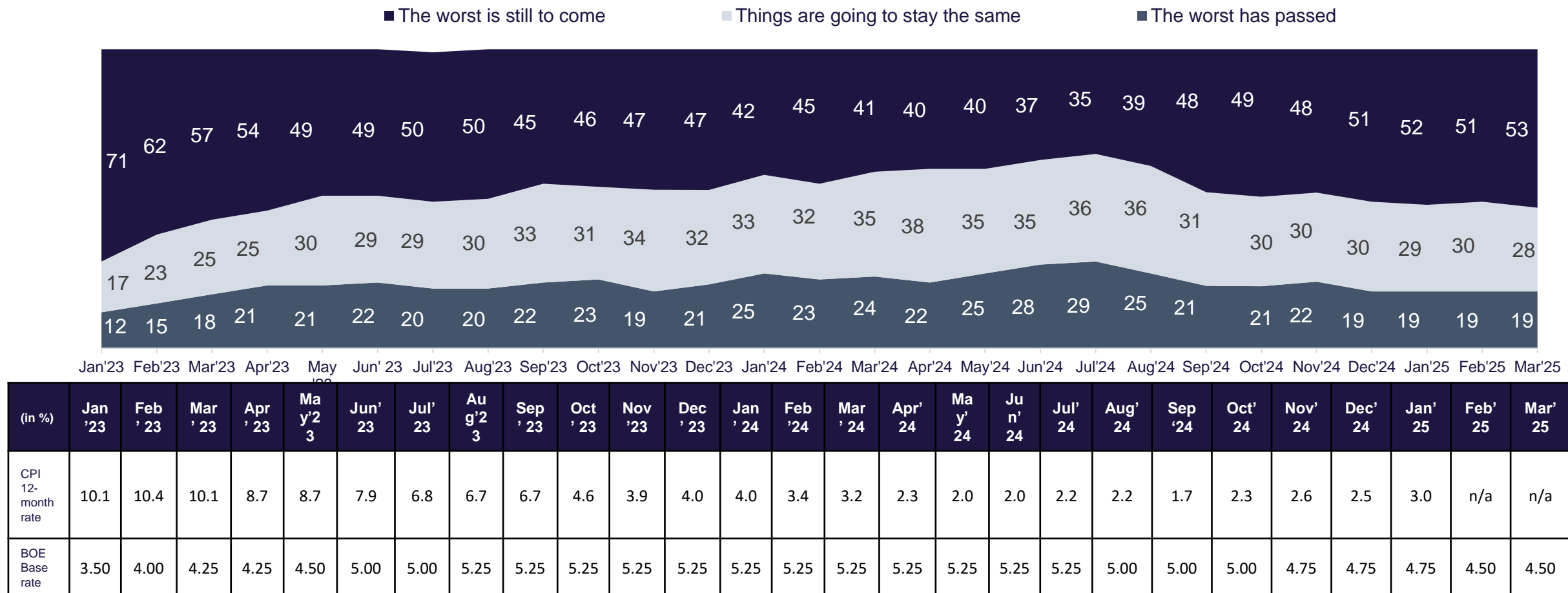
* Represents a statistically significant change on previous wave
N/A – due to new question wording meaning comparison to last wave cannot be done



1. Current General Sentiment

Cost-of-living perceptions have slightly deteriorated compared to last month, with 53% saying 'the worst is still to come' reflecting latest inflation rebound

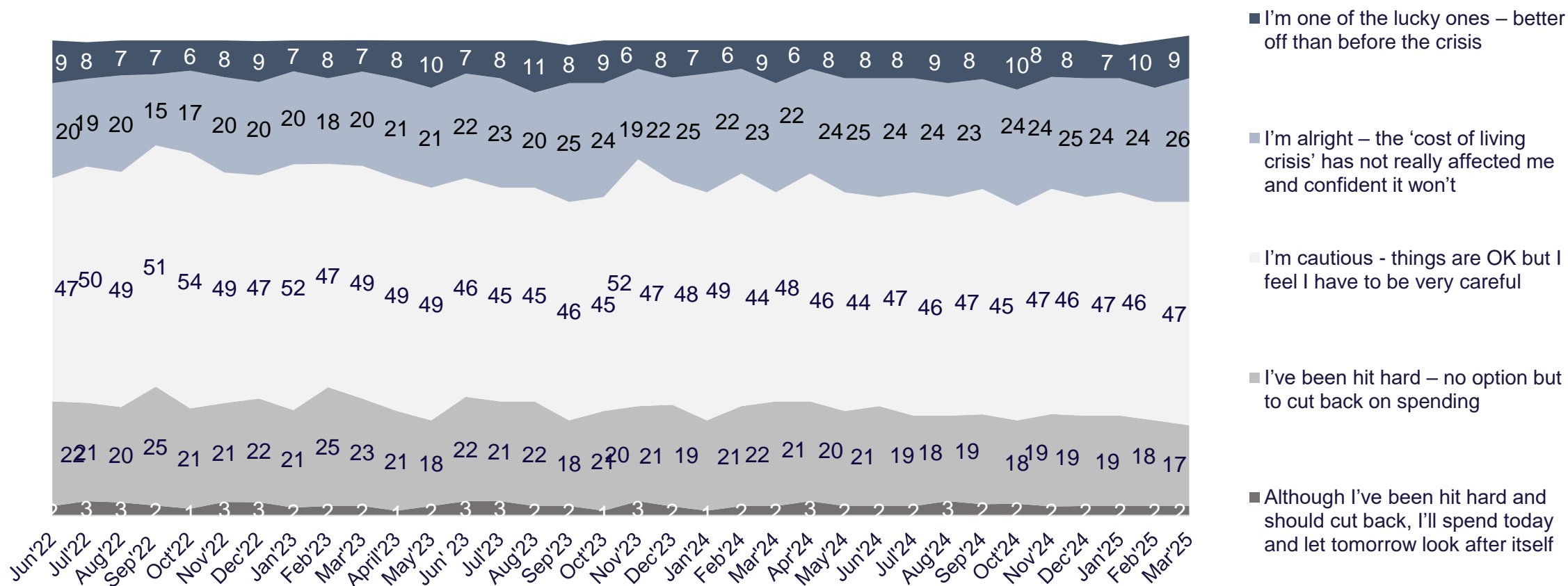
Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK



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. March 2025 = 1,755. Monthly CPI data from the Office of National Statistics (ONS), latest available December 2024. Base Rate historical data from BOE Database.

Due to the cost-of-living crisis, most UK adults (64%) are either 'cautious and being very careful' (47%) or have been 'hit hard and are cutting back' (17%)

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

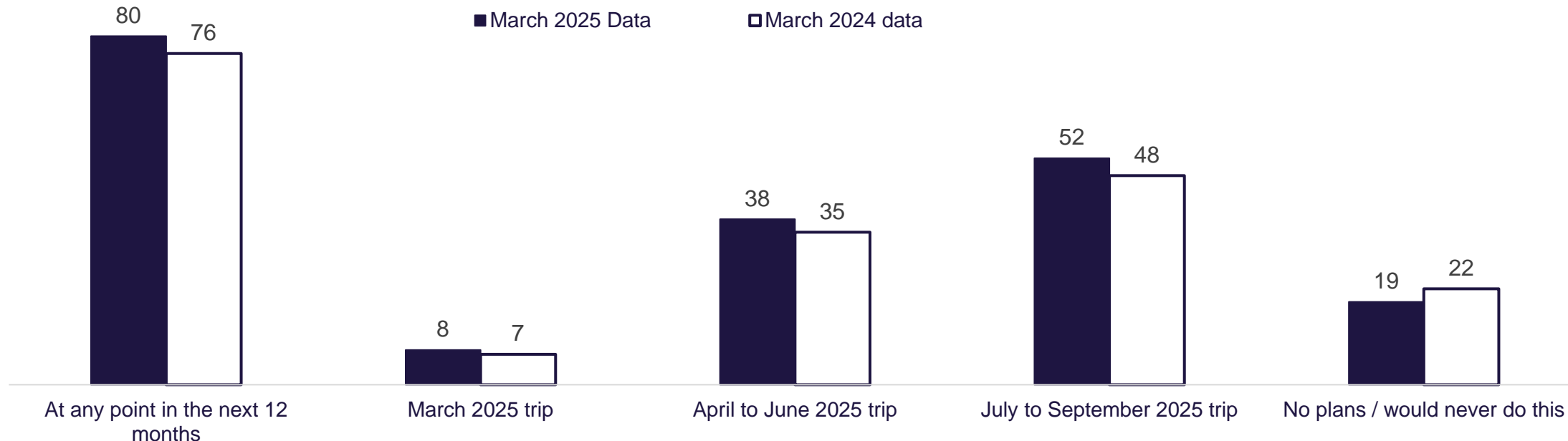


Question: Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. March 2025 = 1,755.

2. Trip Intentions: UK and Overseas

Overnight domestic trip intentions are above those anticipated in 2024. 80% are planning a trip in the next 12 months vs 76% planning to do so this time last year

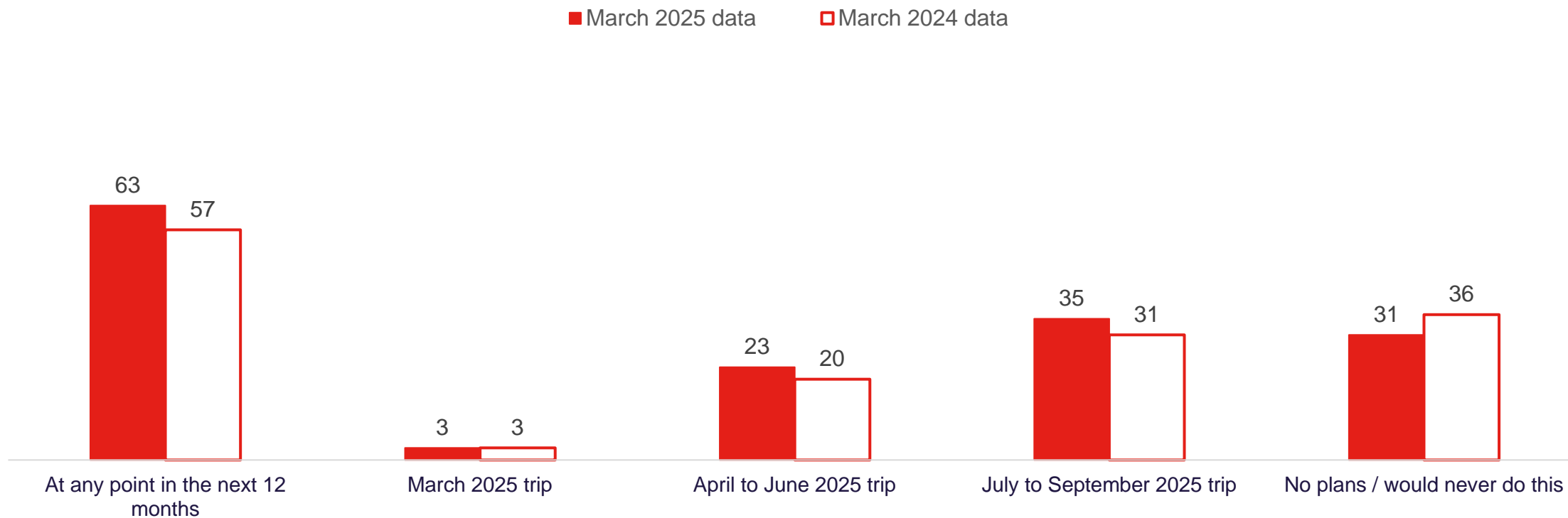
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, March 2025, UK



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 2024 = 1,775, March 2025 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

For overnight overseas trips, intentions are up on 2024 levels, 63% are planning an overseas trip in the next 12 months compared to 57% the year before

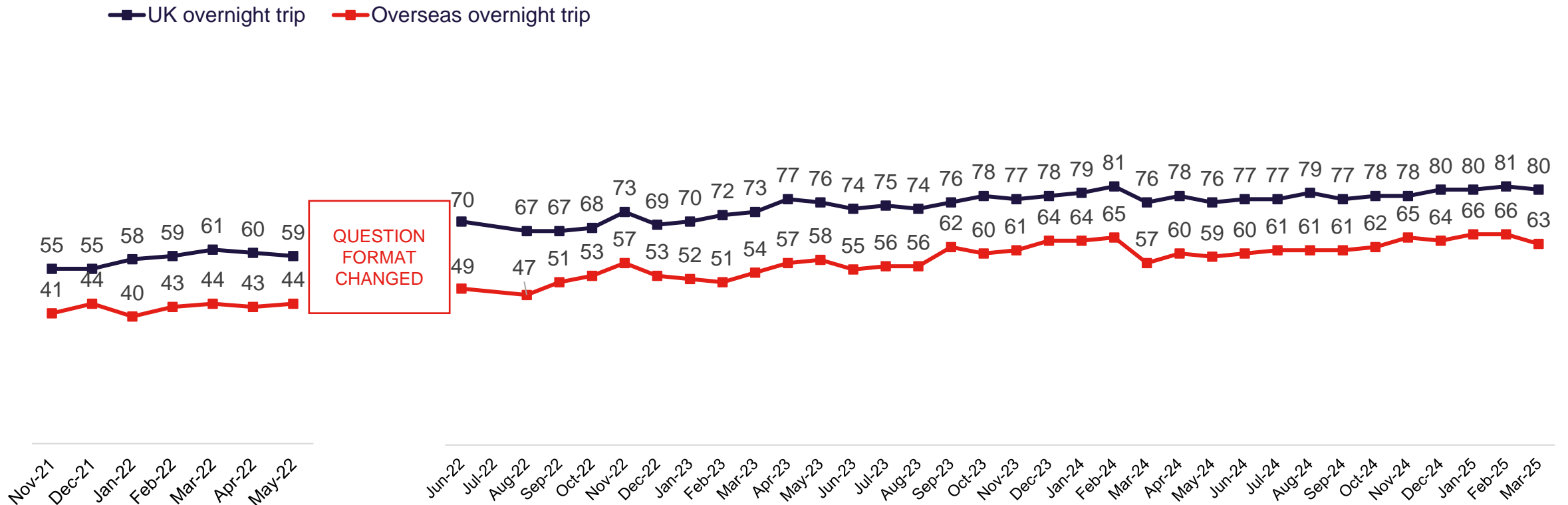
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, March 2025, UK



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 2025 = 1,755, March 2024 = 1,775. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

In March 2025, domestic trip intentions are in line with those seen in the past few months, while overseas intentions are similar to the levels last seen in October 2024

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, Wave-on-wave, 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 2025 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. ***no data available for July 2022.**

Commitment is higher for overseas trips compared to UK trips – 68% are very committed to overseas trips in April 2025 compared to 61% for UK trips in the same month

Figure 7. Commitment to taking the next overnight UK trip, Percentage, March 2025, UK

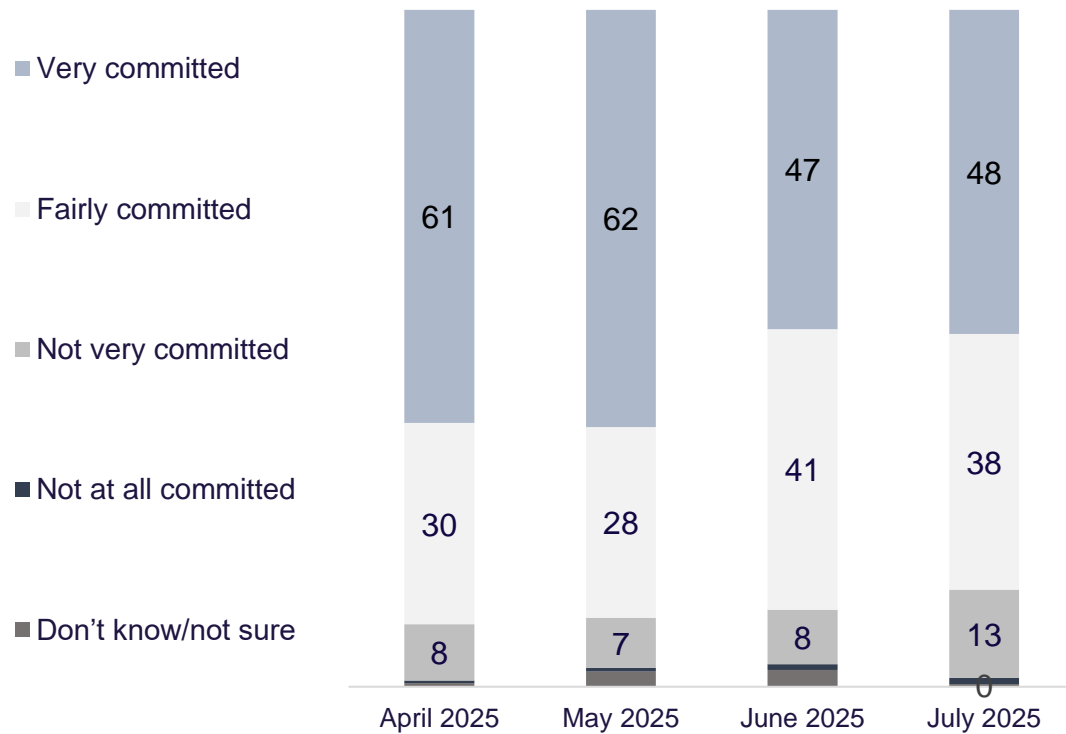
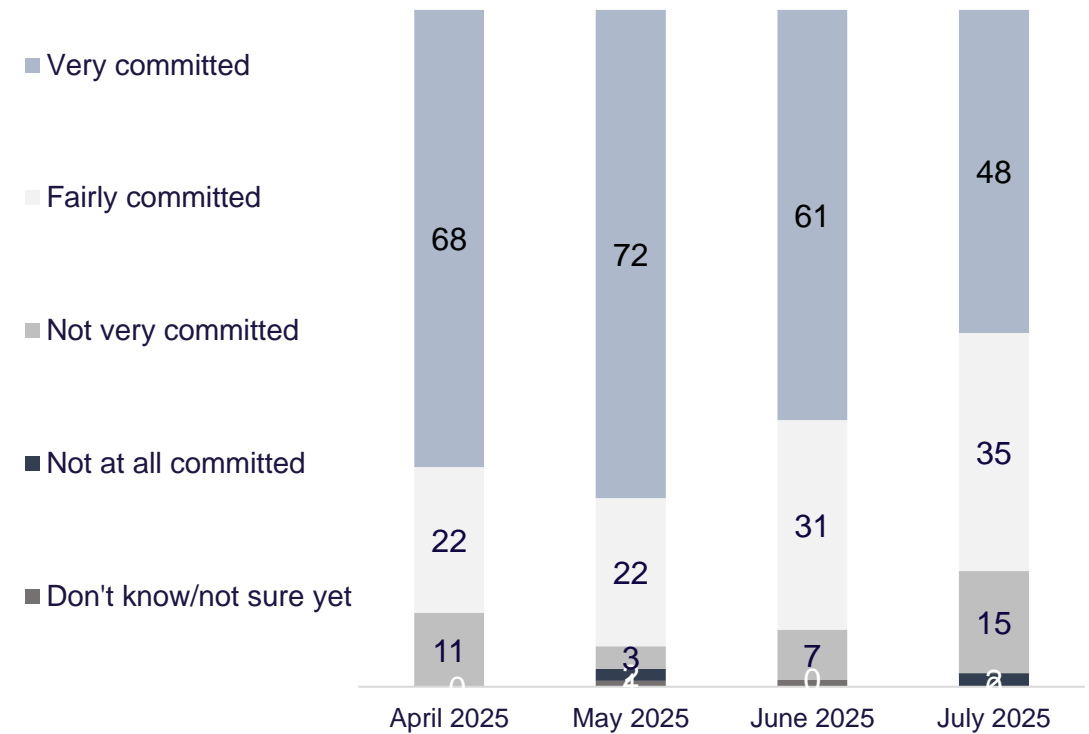


Figure 8. Commitment to taking the next overnight overseas trip, Percentage, March 2025, UK

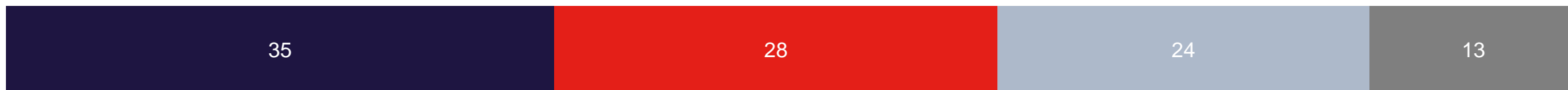


Question: VB2ei: How committed are you to taking this next trip in [pipe: hVB3]?; Base: All March respondents: April 2025 = 209, May 2025 = 213, June 2025 = 180, July 2025 = 205. VB2eii: How committed are you to taking this next trip in [pipe: hVB2civ]? Base: All March respondents: April 2025 = 96, May 2025 = 128, June 2025 = 147, July 2025 = 149.

The number of UK adults who are more likely to choose UK trips (35%) outweighs the proportion of those preferring to travel overseas (28%). UK holidays are easier to plan (55%), while overseas trips have the draw of better weather (51%)

Figure 9. Difference in short break/holiday choices in the next 6 months compared to last 12 months, Percentage, March 2025, UK

■ More likely to choose UK than overseas ■ More likely to choose overseas than UK ■ Broadly the same as past 12 months ■ Don't know/It depends on the situation



TOP 5 reasons for UK preference

1. UK holidays are easier to plan (55%)
2. UK holidays are cheaper (44%)
3. Shorter / quicker travel (42%)
4. To avoid long queues at airports/ports or cancelled flights/voyages (32%)
5. I want to take holidays in places I am familiar with (31%)

TOP 5 reasons for Overseas preference

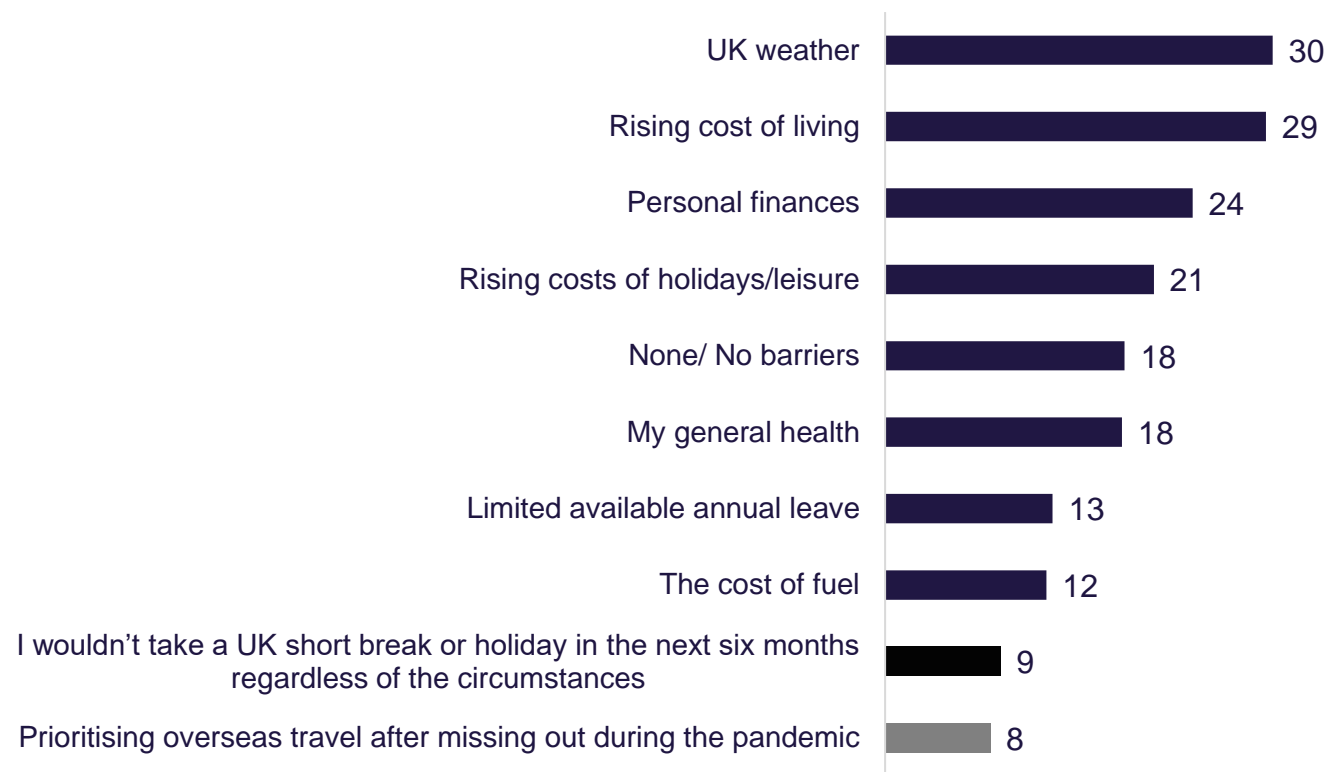
1. Better weather (51%)
2. I want to visit new places/experience new cultures (43%)
3. Overseas holidays are cheaper (28%)
4. I'm prioritising overseas trips after missing out in the last few years (23%)
5. To visit friends or relatives (21%)

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

Question: VB2j. Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months? Base: All respondents. March 2025 = 1,755. VB2k. Why are you more likely to choose a UK trip than an overseas trip? March 2025 = 624. VB2l. Why are you more likely to choose an overseas trip than a UK trip? March 2025 = 480.

The top potential barrier to taking overnight UK trips in the next 6 months is 'UK weather' at 30%. The 'costs and finances' barrier decreased in March 2025 compared to last month

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, March 2025, UK



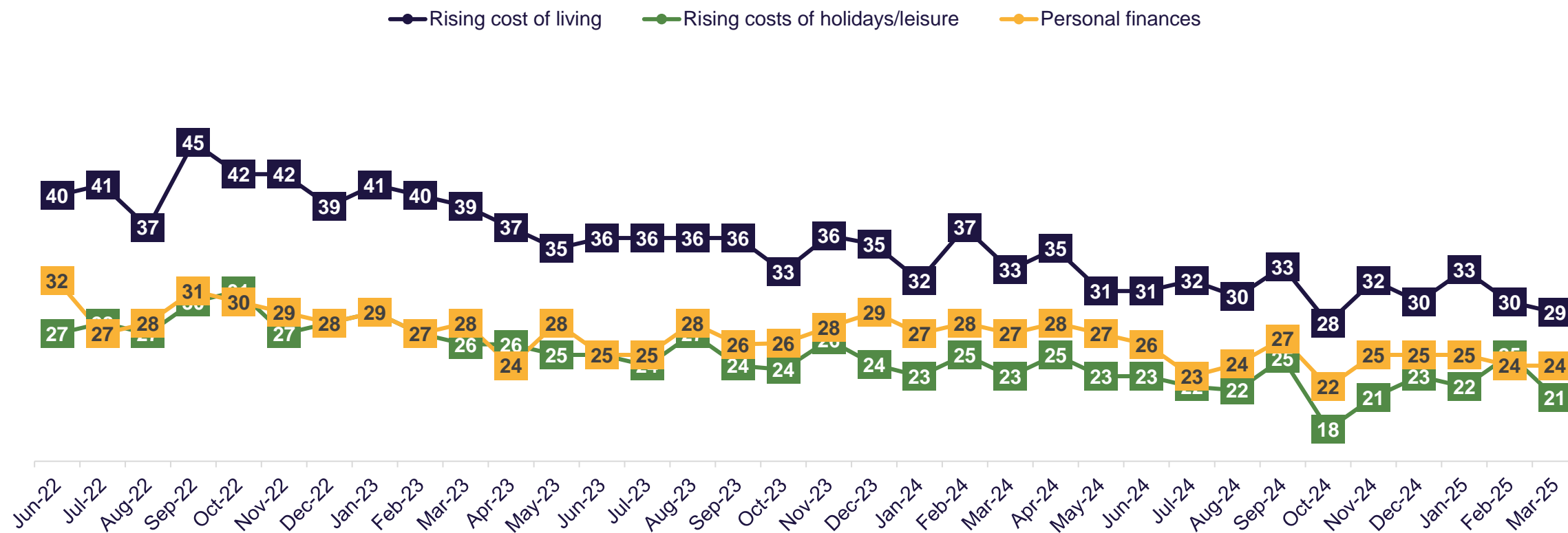
	Dec 2024 data	Jan 2025 data	Feb 2025 data	Mar 2025 data
NET: Costs and finances	54%	54%	55%	52%

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 2025 = 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 perception of personal financial barriers to domestic travel are somewhat consistent with the past three months

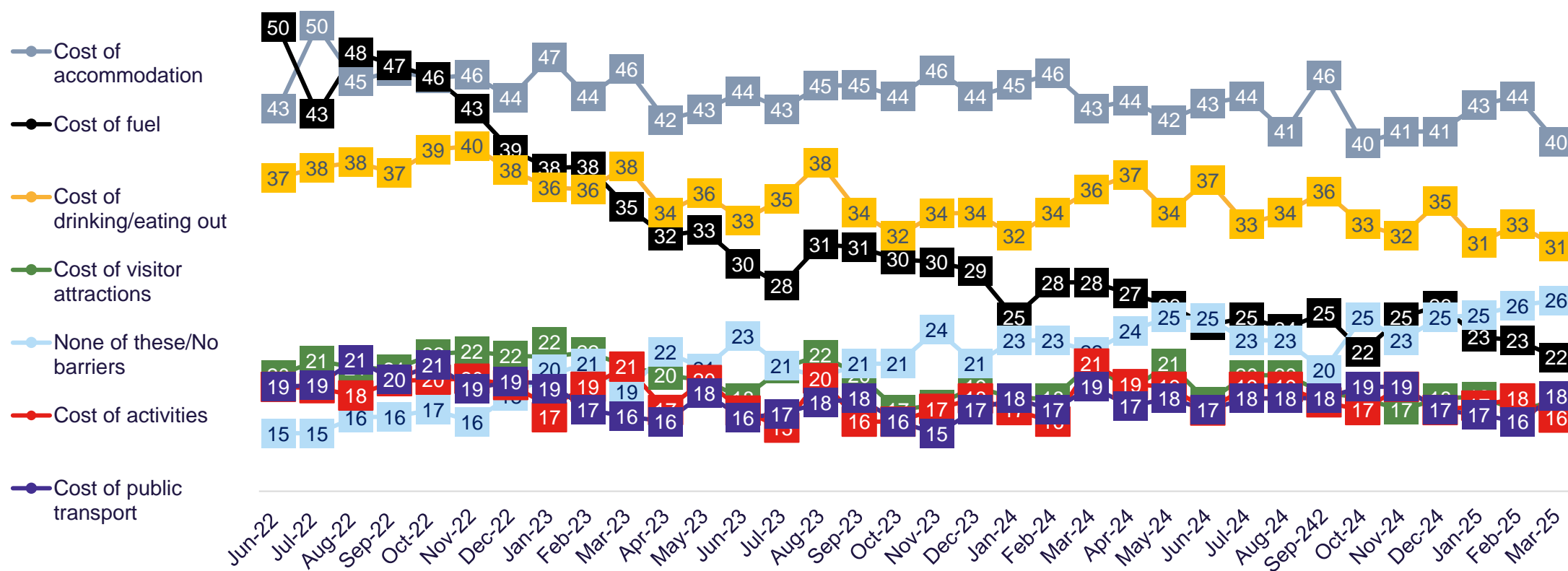
Figure 10b. Perceived financial barriers to an overnight trip in the UK in next 6 months, Wave-on-wave, Percentage, UK



Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All asked each question. March 2025 = 1,755.

Focusing on barriers related directly to the cost of a domestic overnight trip, the 'cost of accommodation' 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



UK adults plan to mainly cut their overnight trip spending on accommodation, eating out and activities. 26% will reduce the number of overnight trips they will take

Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, March 2025, UK, Full list



Reduce the number of UK overnight trips	Dec 2024 data	Jan 2025 data	Feb 2025 data	Mar 2025 data
NET 'fewer', 'not go', 'go day trips instead'	26%	24%	25%	26%

In terms of UK day trips, 19% of UK adults intend to 'look for more 'free things' to do' and 18% will 'spend less on eating out' and 'take fewer day trips'. 26% will take fewer day trips or not go on any at all

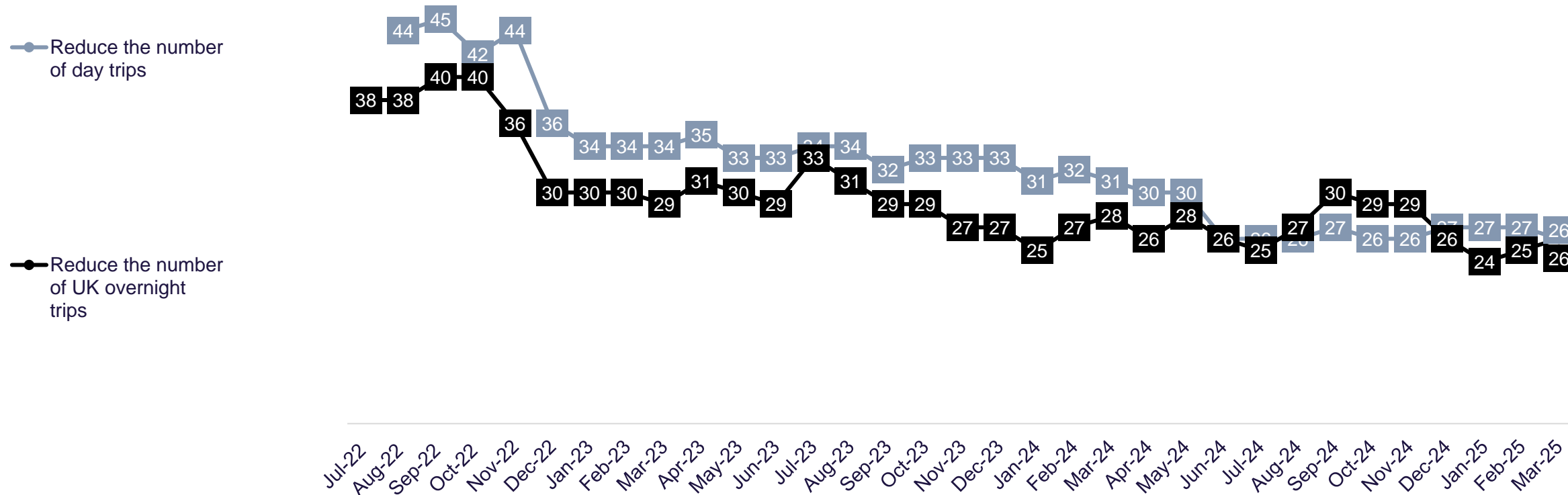
Figure 13b. 'Cost of living' impact on day trips, Percentage, March 2025, UK, Full list



Reduce the number of day trips	Dec 2024 data	Jan 2025 data	Feb 2025 data	Mar 2025 data
NET 'fewer', 'not go on day trips'	27%	27%	27%	26%

UK adults are now just as likely to reduce the number of UK day trips compared to UK overnight trips due to the cost of living (26% reducing both trip types)

Figure 13c. 'Cost of living' impact on UK holidays and short breaks and day trips, Percentage, Wave-on-wave 2024, UK,



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?

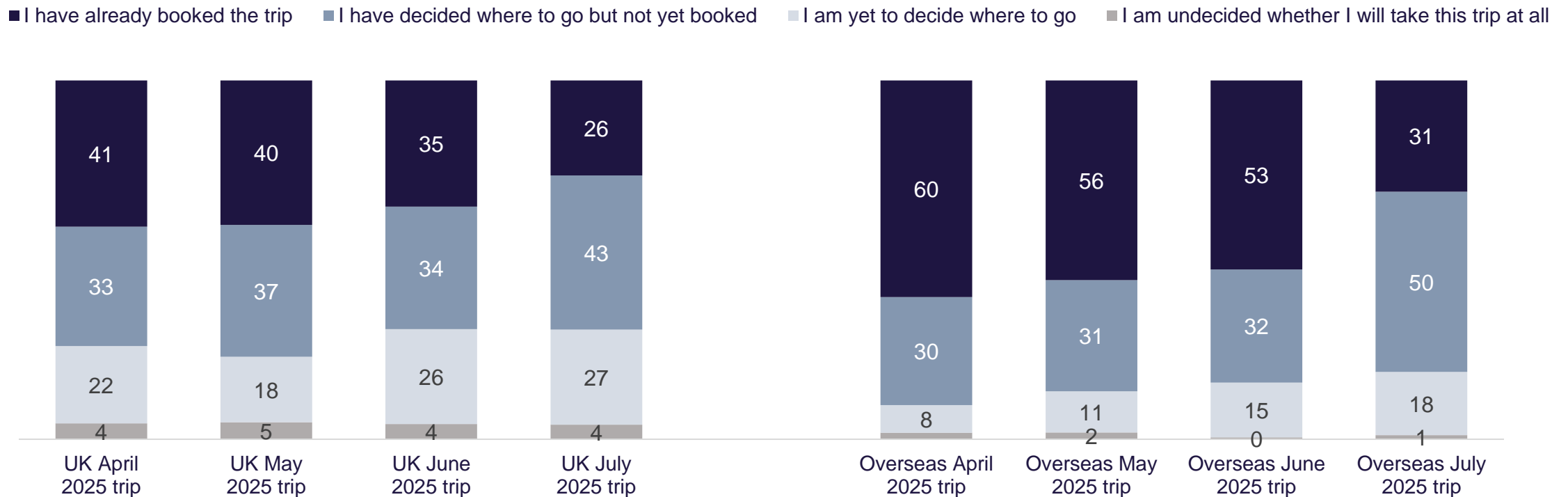
Base: March 2025 = 943 Question: VB7Cii. How, if at all, would you say the 'cost of living crisis' is likely to influence your day trips in the next few months?

Base: March 2025 = 843. *Question format changed in March 2024. **VB7Cii was introduced in August 2022

3. The Next Trip: Overnight and Day Trips

41% of UK intenders have already booked their domestic trips for April 2025, while 60% have already booked their overseas trips for the same month

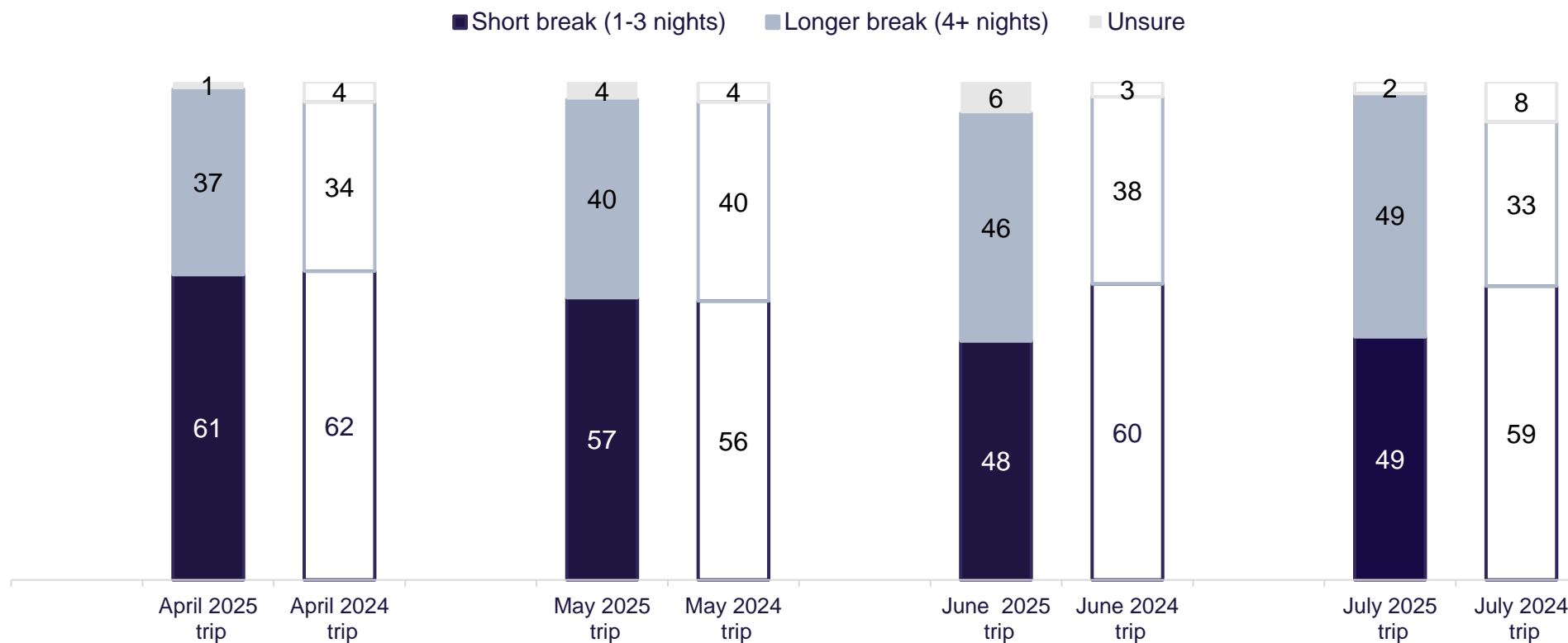
Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, March 2025, UK



Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)>? Base: UK trip: April 2025 n = 209, May 2025 n = 213, June 2025 n = 180, July 2025 n = 205. 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 2025 n = 96, May 2025 n = 128, June 2025 n = 147, July 2025 n = 149.

Domestic trips are more likely to be shorter (1-3 nights) than longer (4+ nights) in the coming months. This trend is broadly in line with intention in 2024 when short breaks also dominated

Figure 17. Length of next UK holiday or short break by time period, Percentage, March 2025, UK



Question: QVB3. Is this next trip to <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)?

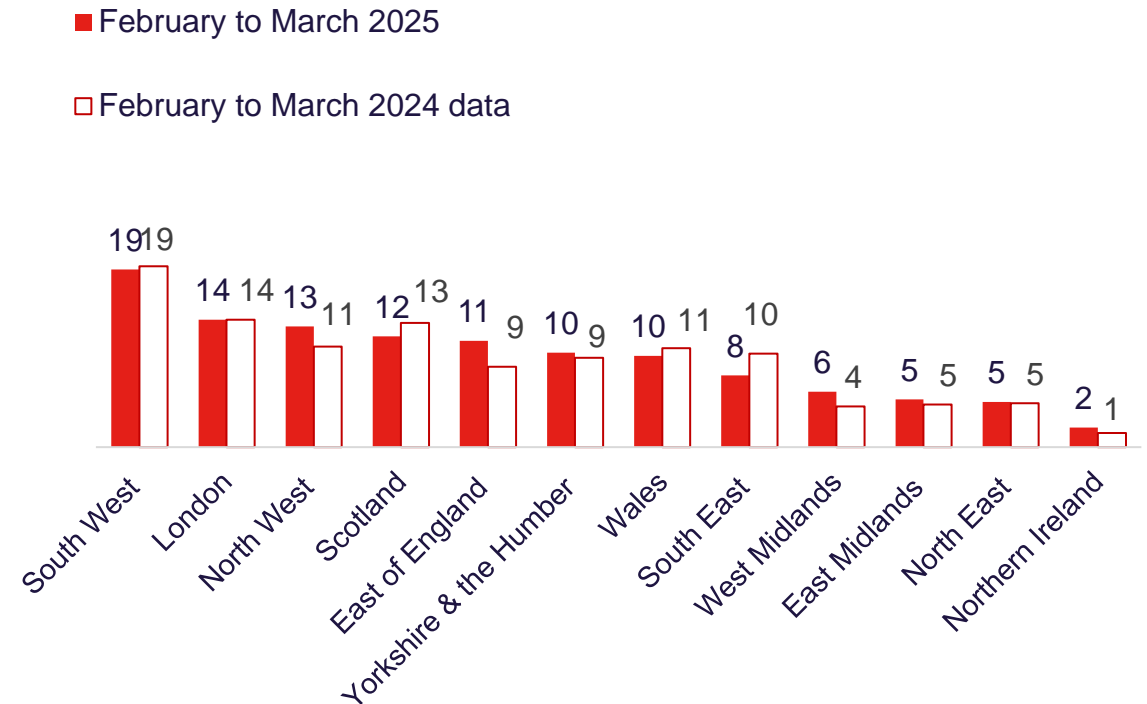
Base: All March 2025 respondents intending to take next holiday or short break in each time period: April 2025 n = 209, May 2025 n = 213, June 2025 n = 180, July 2025 n = 205. All March 2024 respondents: April 2024 n = 198, May 2024 n = 189, June 2024 n = 170, July 2024 n = 186.

South West is the most preferred UK overnight destination for trips in both April to June 2025 and July to September 2025 periods

Figure 18. Where planning on staying on next UK overnight trip in April to June 2025, Percentage, February 2025 and March 2025, UK



Figure 19. Where planning on staying on next UK overnight trip in July to September 2025, Percentage, February 2025 and March 2025, UK



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

Base: All February 2025 and March 2025 respondents planning on taking a holiday April to June 2024 n = 1,129, July to September 2024 n = 933 or short break in the April to June 2025 n = 1,189, July to September 2025 n = 986 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

The top destination type for April-June 2025 trips is 'A city or large town', while it is 'Traditional coastal/seaside town' for July-September 2025 trips

Figure 20. Types of destination for trip in April to June 2025, Percentage, February 2025 and March 2025, UK

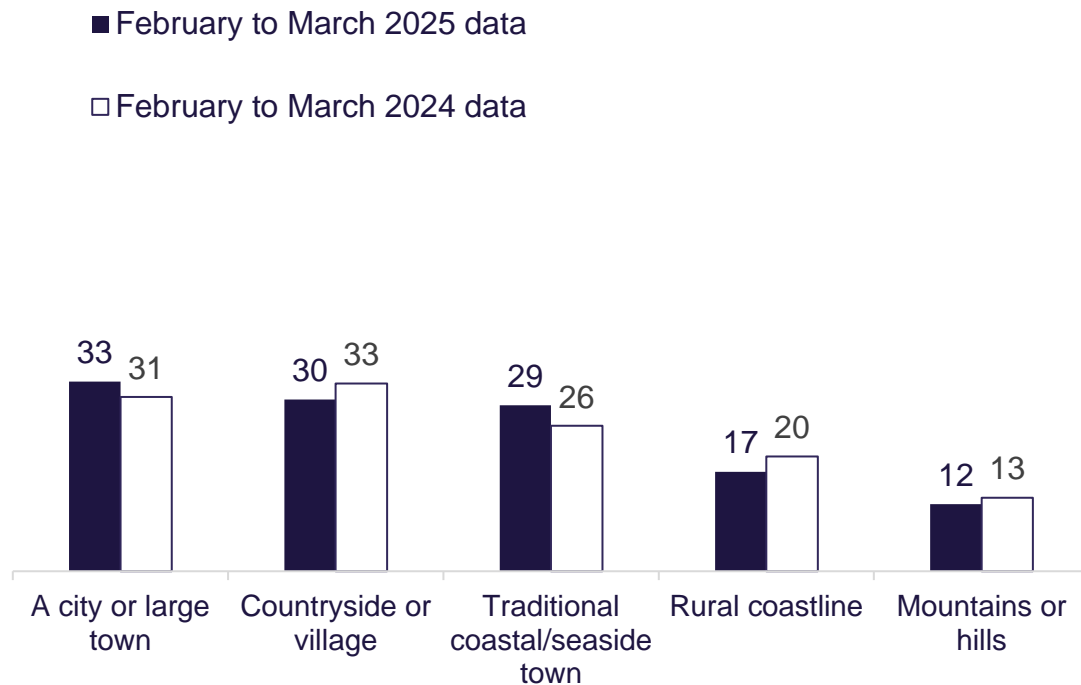
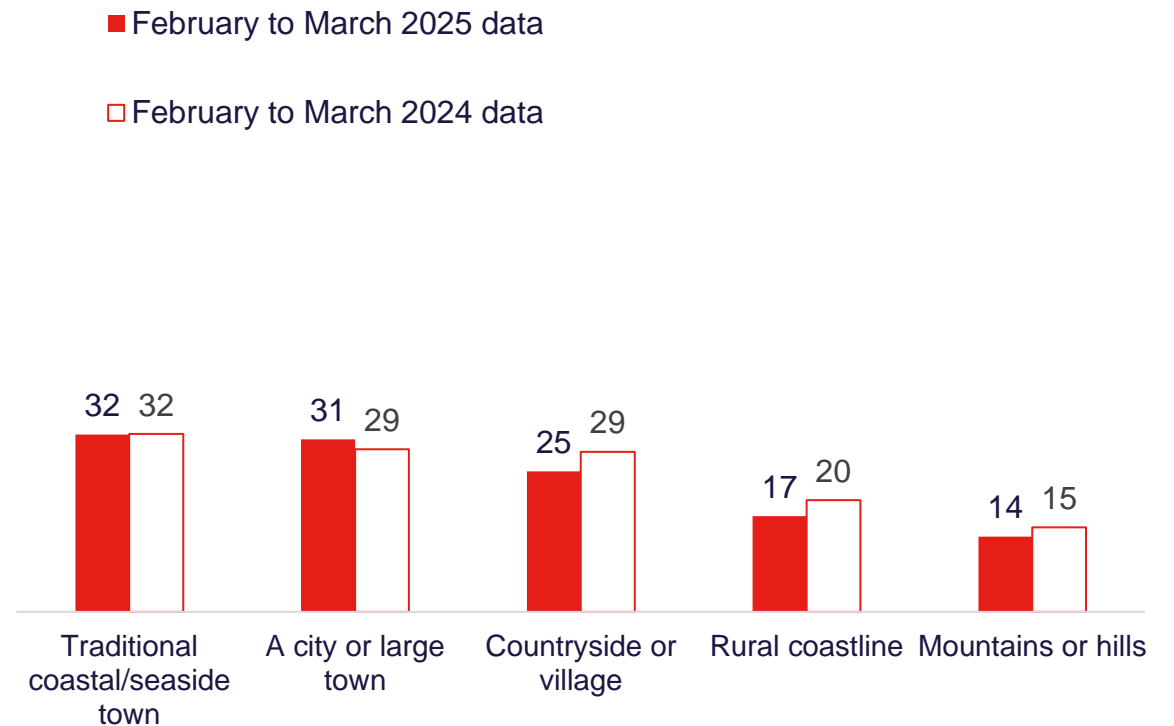


Figure 21. Types of destination for overnight trip in July to September 2025, Percentage, February 2025 and March 2025, UK



Question: VB5. Which of the following best describes the main types of destinations you are likely to stay in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All February 2025 and March 2025 respondents planning on taking a holiday or short break in the April to June 2024 n = 1,129, July to September 2024 n = 933: April to June 2025 n = 1,189, July to September 2025 n = 986

For the next overnight trip, 'Hotel / motel / inn' is the leading accommodation type in both time periods

Figure 24. Top 10 accommodation types planning on staying in on next UK overnight trip in April to June 2025, Percentage, February 2025 and March 2025, UK

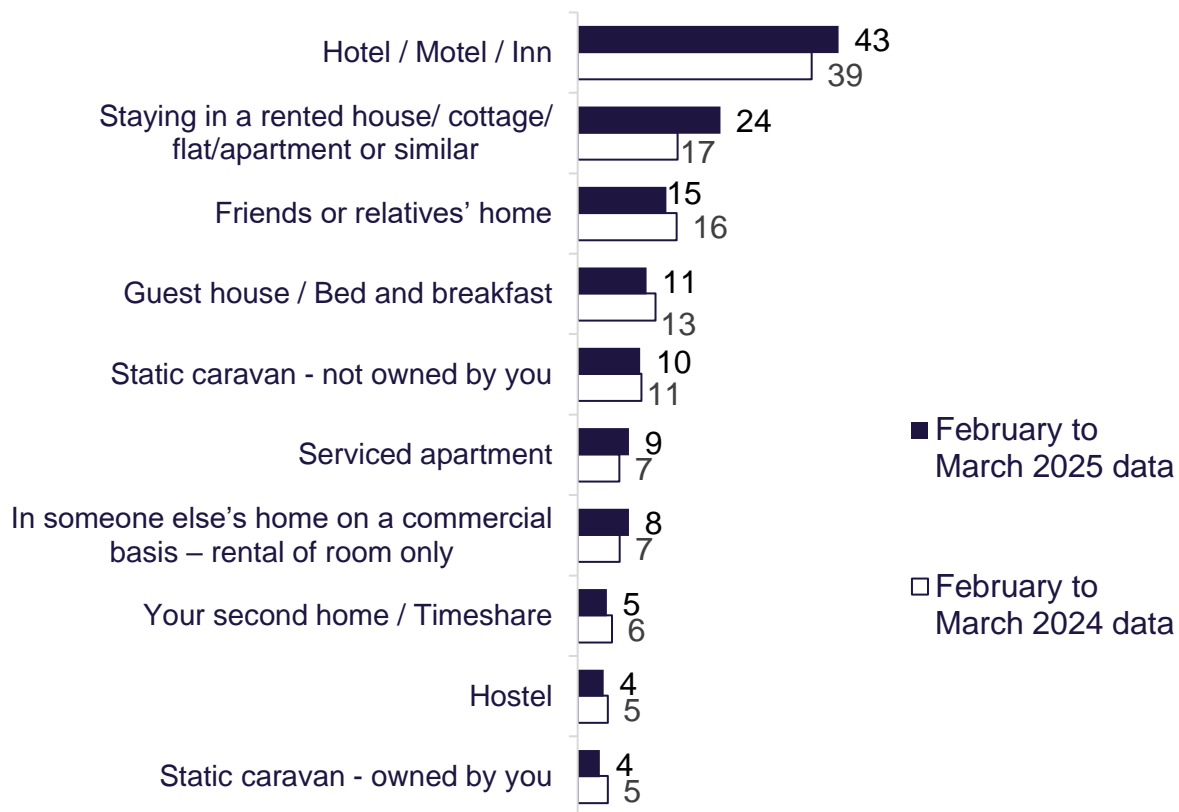
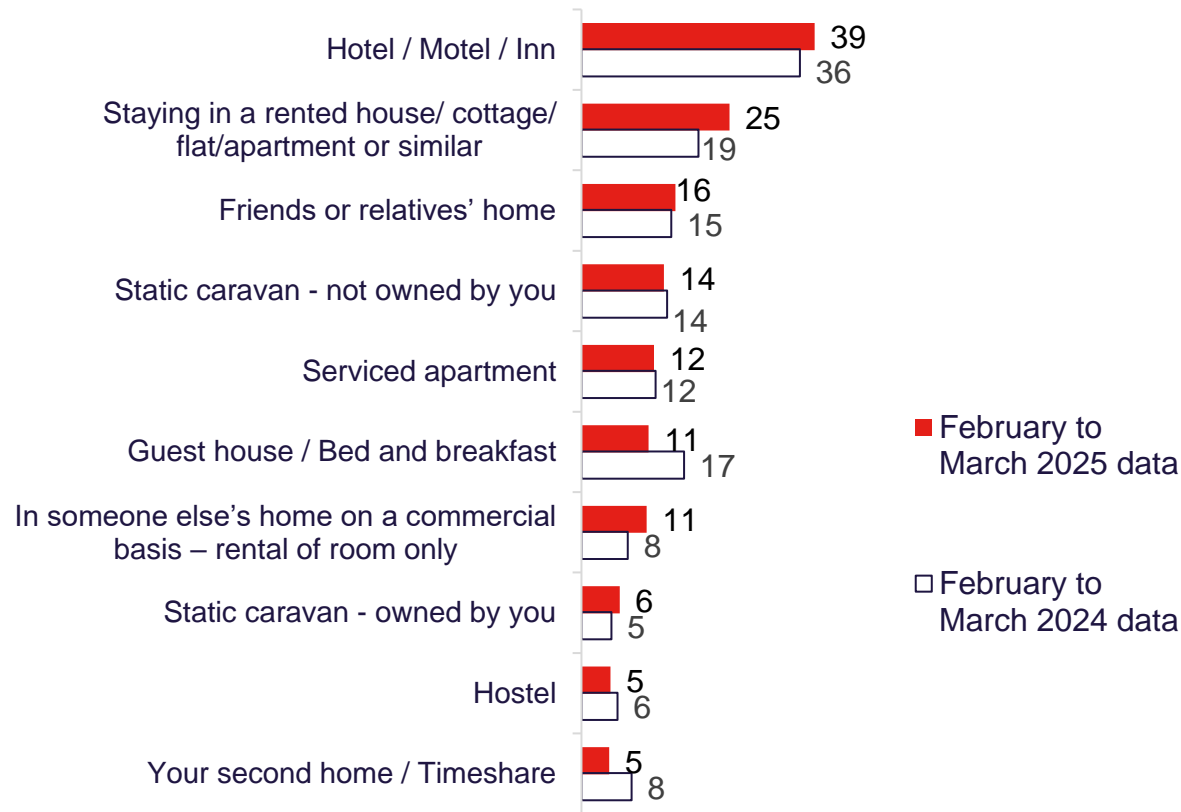


Figure 24. Top 10 accommodation types planning on staying in on next UK overnight trip in July to September 2025, Percentage, February 2025 and March 2025, UK



FOR THE FULL LIST OF ACCOMMODATION TYPES, PLEASE SEE THE PUBLISHED TABLES.
Question: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>. Base: All February 2025 and March 2025 respondents planning on taking a holiday or short break in the UK April to June 2024 n = 1,129, July to September 2024 n = 933: April to June 2025 n = 1,189, July to September 2025 n = 986. *New format of question including new code 'Staying in a rented house/ cottage/ flat/apartment or similar' added in July 2024 wave.

The top motivation for overnight trips in April to June 2025 is 'Family time or time with my partner', while it is 'To get away from it all and have a rest' for July to September 2025 trips

Figure 28. Motivations for UK holidays and short trip in April to June 2025, Percentage, March 2025, UK, Full list



Figure 29. Motivations for UK holidays and short breaks in July to September 2025, Percentage, March 2025, UK, Full list



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

Base: All March 2025 respondents planning on taking a holiday or short break in the UK between April to June 2025 n = 602, July to September 2025 n = 531.

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

The top activity for April to June 2025 trips is 'Trying local food and drink', while it is 'Walking, Hiking or Rambling' for trips in July to September 2025

Figure 30. Activities for UK holidays and short breaks, in April to June 2025, Percentage, March 2025, UK, Full list

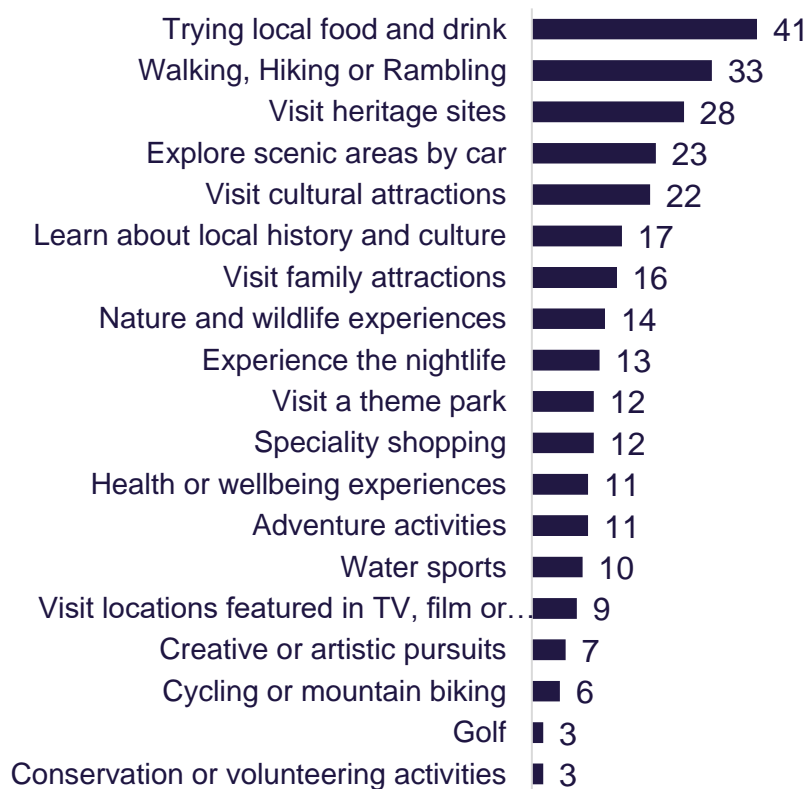


Figure 31. Activities for UK holidays and short breaks in July to September 2025, Percentage, March 2025, UK, Full list

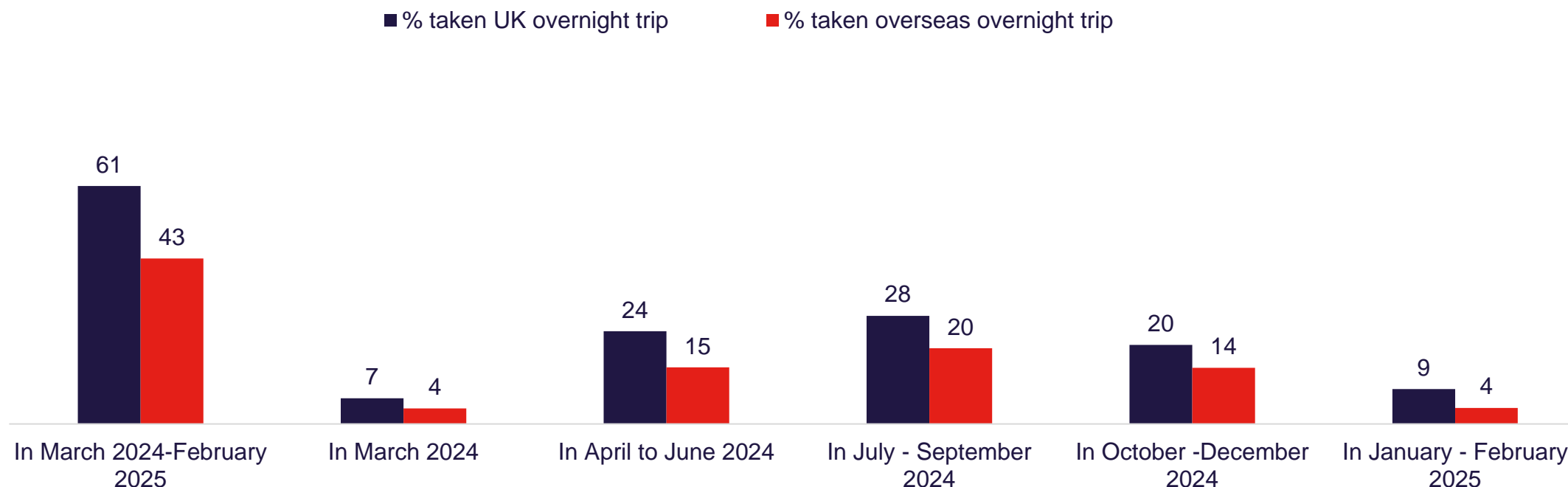


Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
Base: All March 2025 respondents planning on taking a holiday or short break in the UK between April to June 2025 n = 602, July to September 2025 n = 531.
Note: Multiple choice question. Totals may exceed 100%. *Visited theme parks was added to the list in March 2024

4. Past UK and Overseas Trips

Almost 2 in 3 (61%) have taken a UK overnight trip in the past 12 months, while 43% have taken an overseas overnight trip during the same time period

Figure 32. Proportion UK adult population who have taken an overnight UK or overseas trip in below time period, Percentage, March 2025, 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?

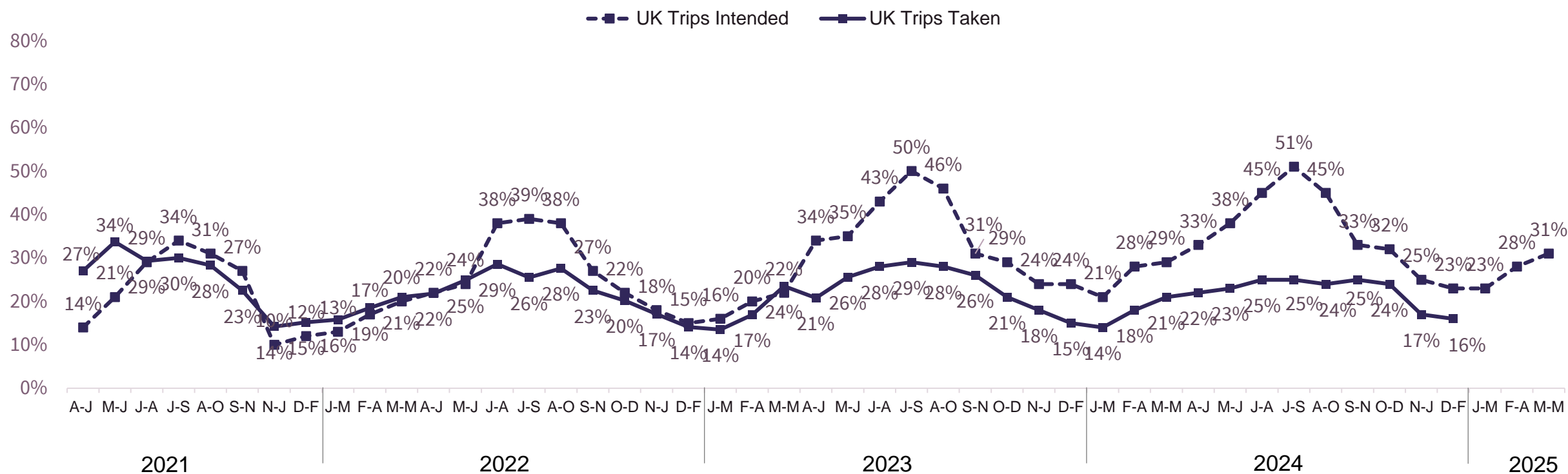
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?

Base: All respondents March 2025 = 1,755.

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

16% of respondents went on a domestic overnight trip between December 2024 and February 2025, which is in line with the same period in 2023/24 (15%)

Figure 32b. Incidence of UK short breaks or holidays intended within next 3 month and taken in last 3 months of UK adult population, Percentage, March 2025, UK



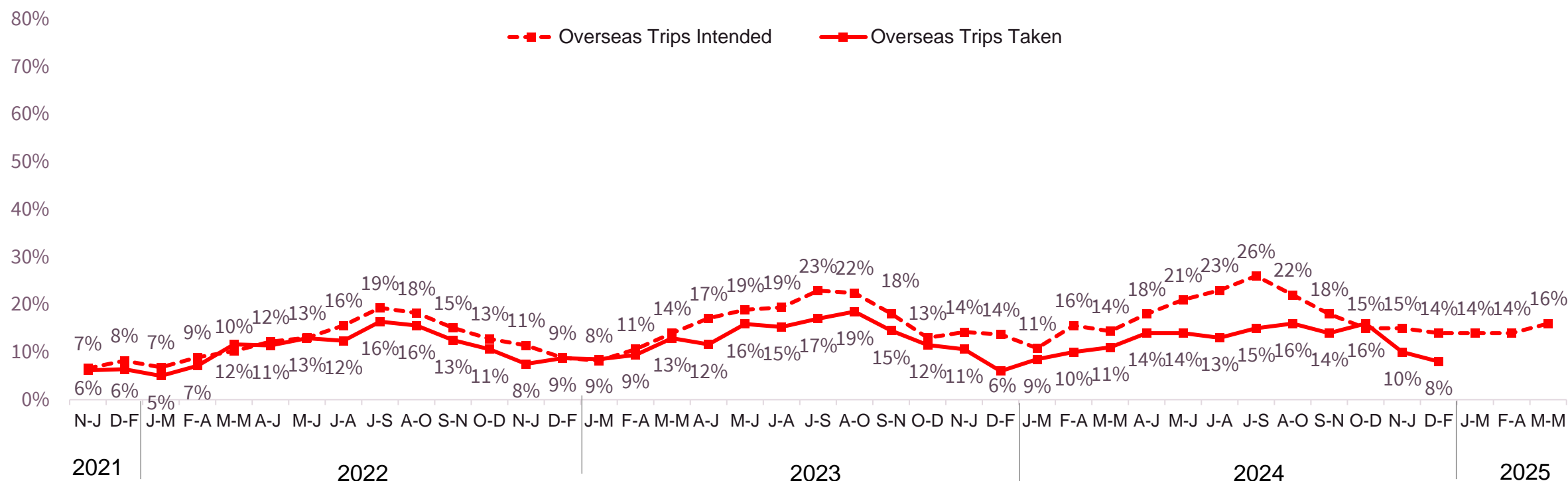
VB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?

VB13a2: Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK in the last 12 months? Base: All UK respondents = 1,755. Data shows the proportion intending to take a trip within the next 3 months – this will not account for intentions established less than 3 months ahead of trip date – and trips taken.

Actual trips taken is only available from April 2021 up to February 2025.

8% went on an overseas holiday between December 2024 and February 2025, versus 6% for the same period in 2023/24. The gap between intention and trips taken is smaller for overseas than domestic trips

Figure 32c. Incidence of overseas short breaks or holidays intended within next 3 month and taken in last 3 months of UK adult population, Percentage, March 2025, UK

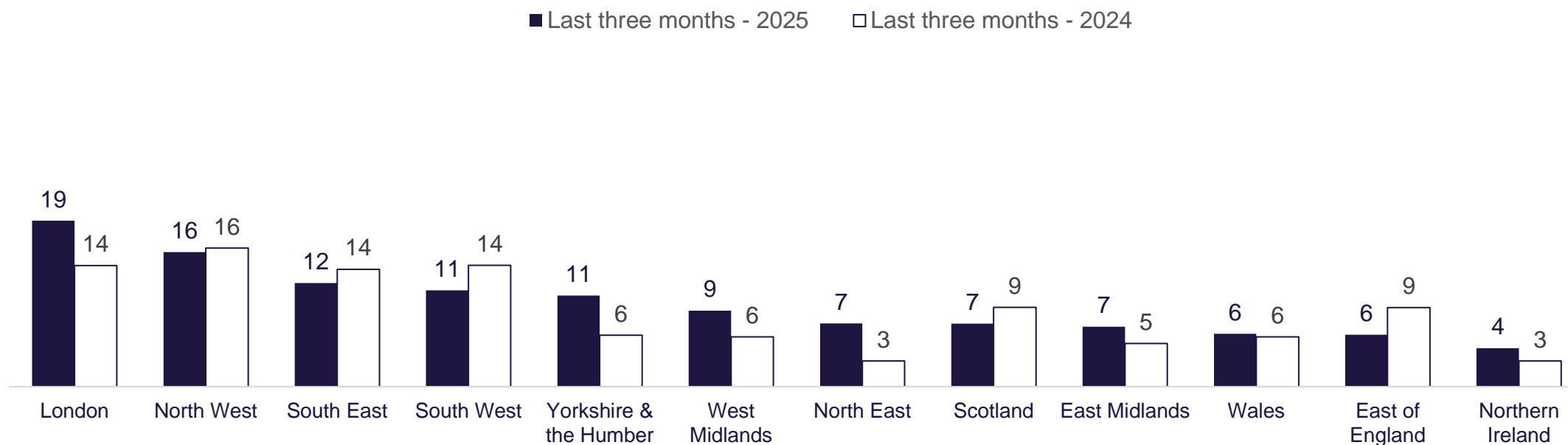


VB2c. Thinking of the next Overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?

VB13g: Now reflecting on your recent behaviour, have you taken an overnight overseas short break or holiday in the last 12 months? Base: All UK respondents = 1,755. Data shows the proportion intending to take a trip within the next 3 months – this will not account for intentions established less than 3 months ahead of trip date – and trips taken. Actual trips taken is only available from April 2021 up to February 2025.

London and the North West of England were the most popular destinations for domestic trips in the past three months

Figure 33. Destination of overnight trips taken in UK in the past three months, Percentage, March 2025, 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 2025 respondents that took an overnight trips in the last three months n = 267, March 2024 respondents = 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 2025 data)

16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. 'Team building' (34%) and 'Meeting' (32%) are the leading reasons

Figure 35. Proportion anticipating an overnight business trip in next 3 months, Percentage, March 2025, UK adults in employment

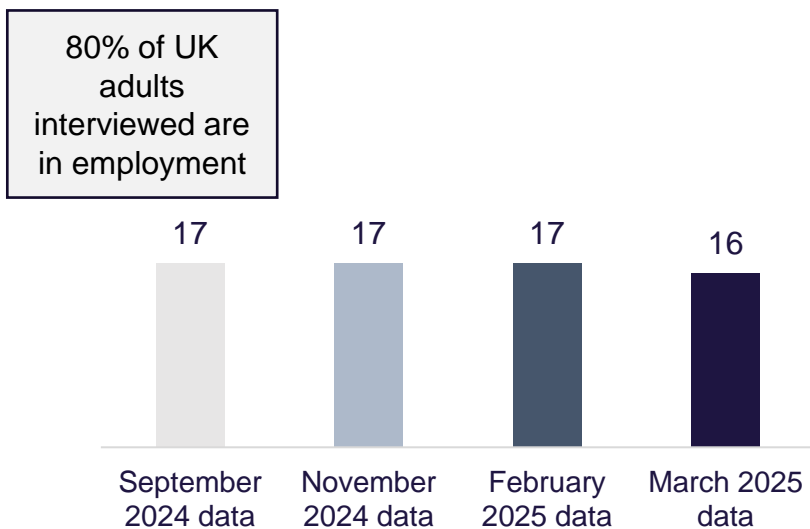
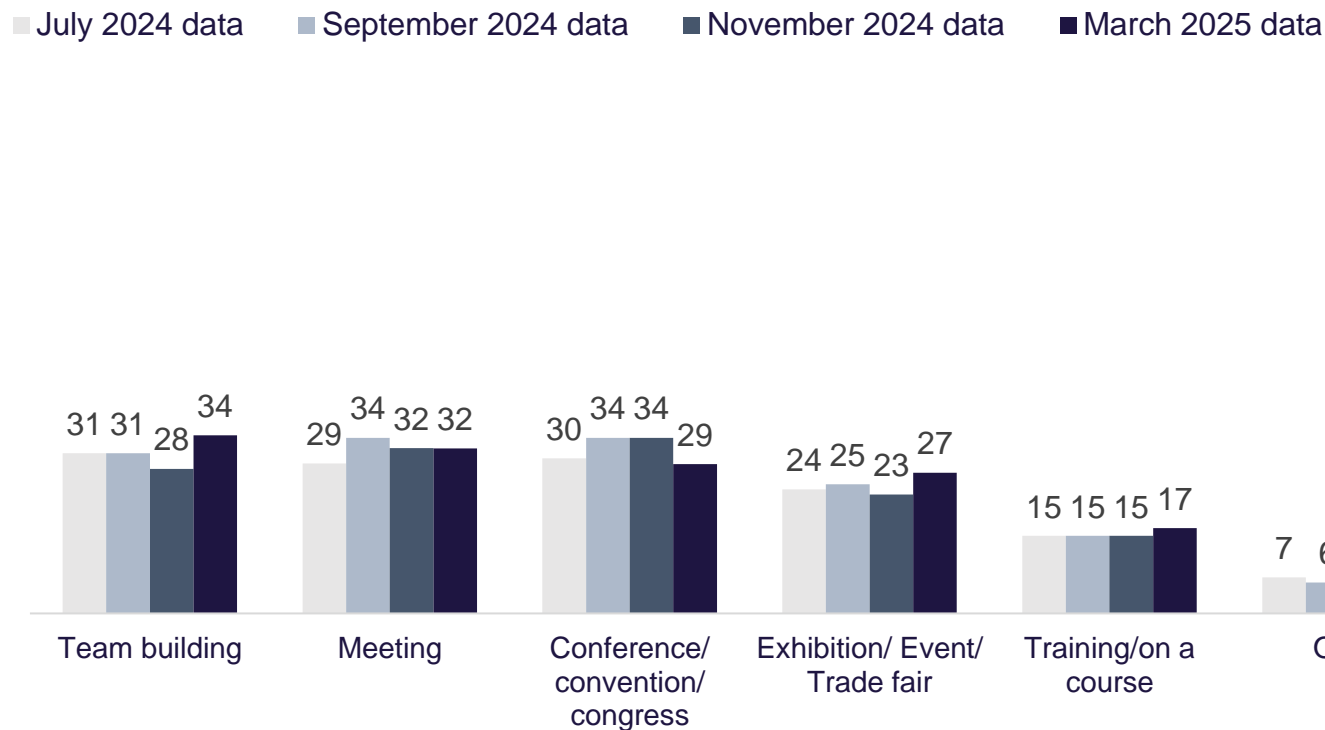


Figure 36. Reasons for taking an overnight business trip in next 3 months, Percentage, March 2025, UK adults in employment planning a trip



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 2025 respondents currently in employment n = 1,755. All taking a business trip n = 310.



Methodology & Further Data

Methodology

- This report presents findings from the March 2025 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 phase of this project started in April 2023 and will run until March 2025.
- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis' impact on trips intentions. It also covers the preference for domestic vs overseas overnight trips.
- Please note that because of the questionnaire updates, some questions are not comparable between this phase and the previous phases / waves.

Master Data Table

- The full data tables are published on the VisitBritain website alongside this report and questions' data not shown in this report are available to view there: <https://www.visitbritain.org/domestic-sentiment-tracker>

Extra questions available in the tables are:

- VB1b. Likely to spend more, less or about the same on holidays in the next 12 months, vs last 12 months
 - VB9a/b. More/Less likely to visit leisure places in the UK in the next 12 months, vs last 12 months
 - VB10a/b. More/Less likely to conduct leisure activities in the UK in the next 12 months, vs last 12 months
- To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left-hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.

