

Sustainability Analysis

Domestic Sentiment Tracker: March 2025



Overview



- VisitEngland, VisitScotland and Visit Wales have been running a Consumer Sentiment Tracker, amongst a domestic audience, 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
- These slides provide an overview of topline findings from the sustainability related questions that are asked twice a year, usually in March and October.



Location: Forest of Dean, Gloucestershire, England.
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Topline Summary

- Over a fifth (22%) of UK adults say climate change influences their holiday choices to a large or very large extent. Younger adults are more likely to be influenced, with 30% of 16–24 year olds and 39% of 25–34 year olds considering climate change when planning a holiday, compared to just 12% of those aged 65+ and 11% of 55–64 year olds. There are minimal gender differences, and concern about climate change has remained a relatively minor but consistent factor in UK adults' holiday planning over time.
- 25% of UK adults have specifically looked for sustainable holiday accommodation, and of these, 71% say it is easy to find sustainable options in England. The strongest motivator for booking sustainable accommodation is when it offers a unique or authentic experience (39%).
- Sustainable travel matters to many (30%), but over half remain neutral. The proportion strongly agreeing with the statement “Sustainable travel is really important to me” has risen from 28% in October 2023 to 30% in March 2025, showing a steady increase in engagement.
- Everyday habits are the most common form of environmental action, with 62% recycling items rather than throwing them away, while fewer make bigger lifestyle changes such as flying less or shorter distances (18%) or switching to renewable energy suppliers (20%).

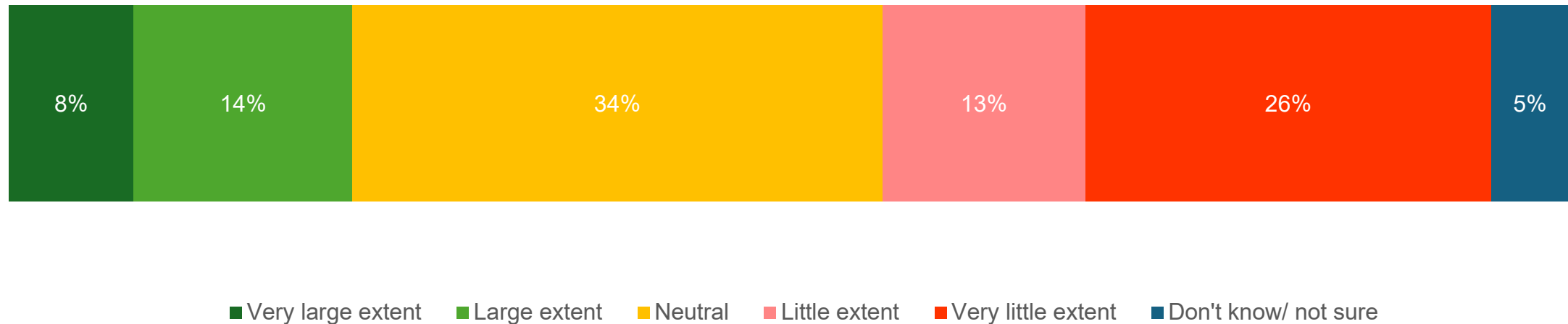


Sustainability influences on holiday choices

Two men and a woman walk through tall fern with woods behind. Location: Newtown, Northumberland, England © Visit Northumberland/Kevin Gibson

Over a fifth (22%) of UK adults say climate change influences their holiday choices to a large or very large extent

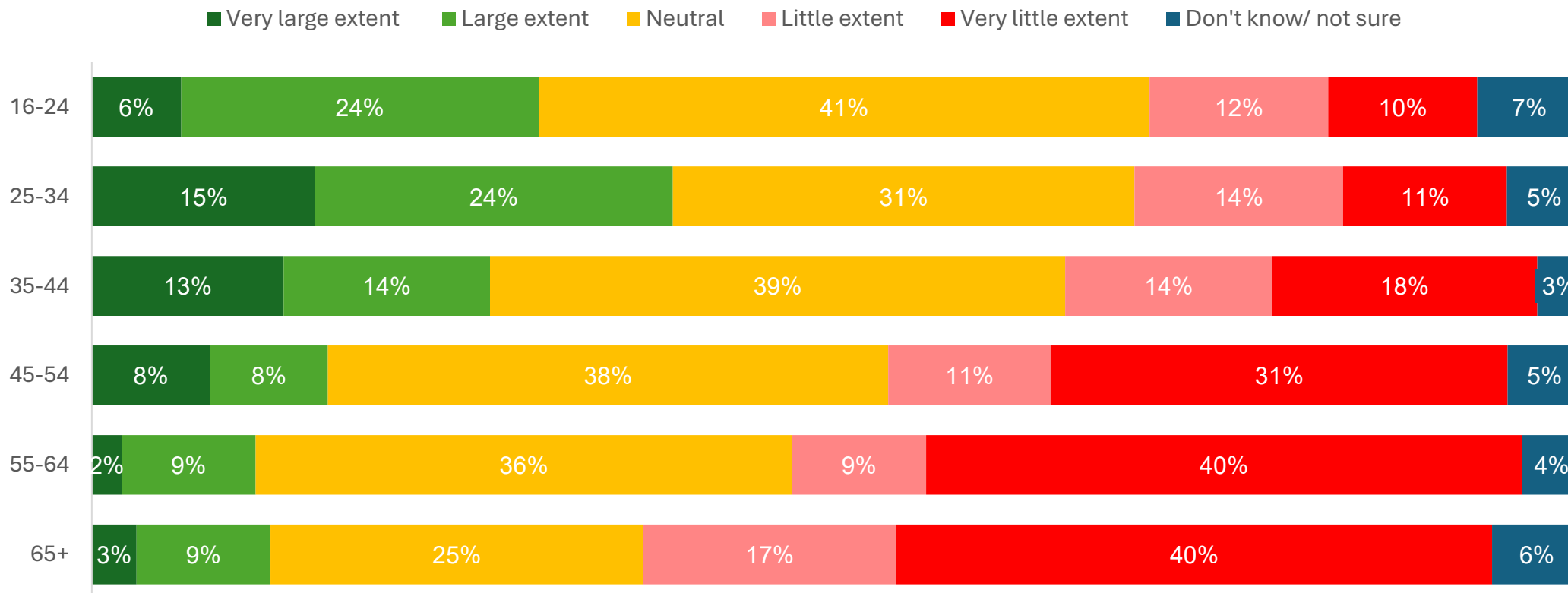
The extent to which concern about climate change influences UK adult's choices when planning a holiday



Younger respondents are more influenced by climate concerns when holiday planning



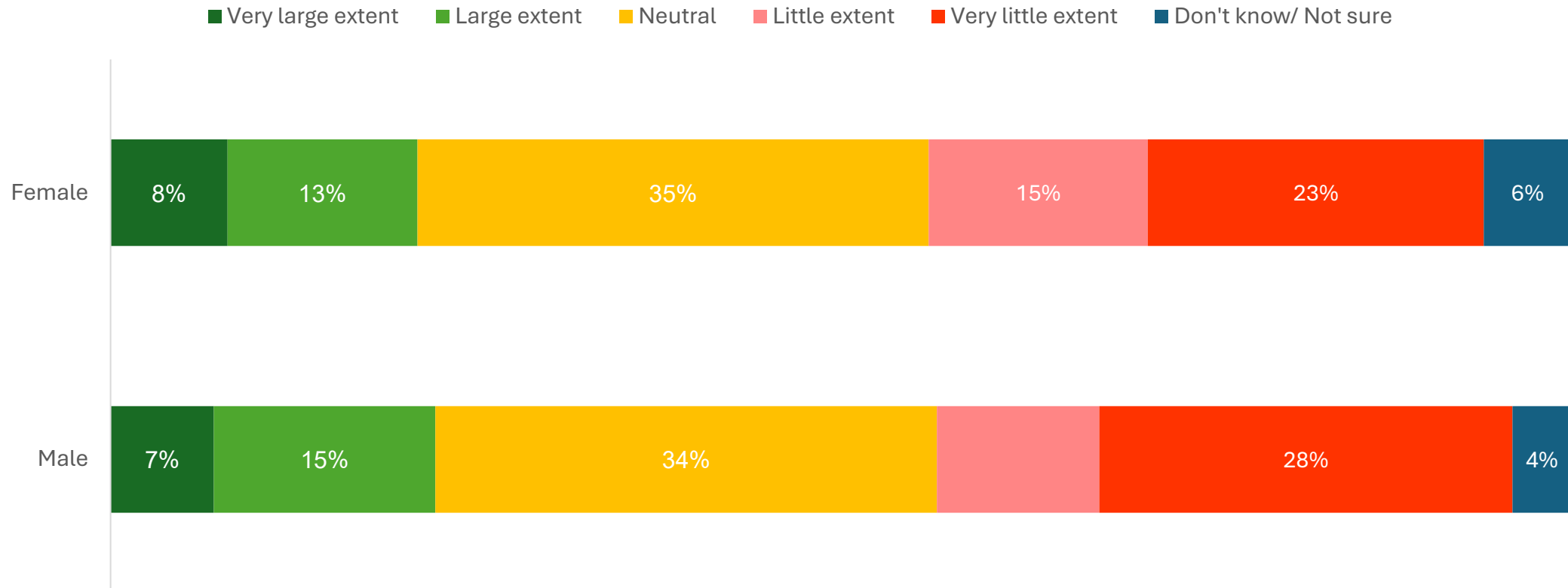
Extent to which UK adults consider climate change when planning a holiday



QVB15a: When planning a holiday or short break, to what extent does concern about climate change influence your choices?
Sample: 1755 UK adults aged 16+

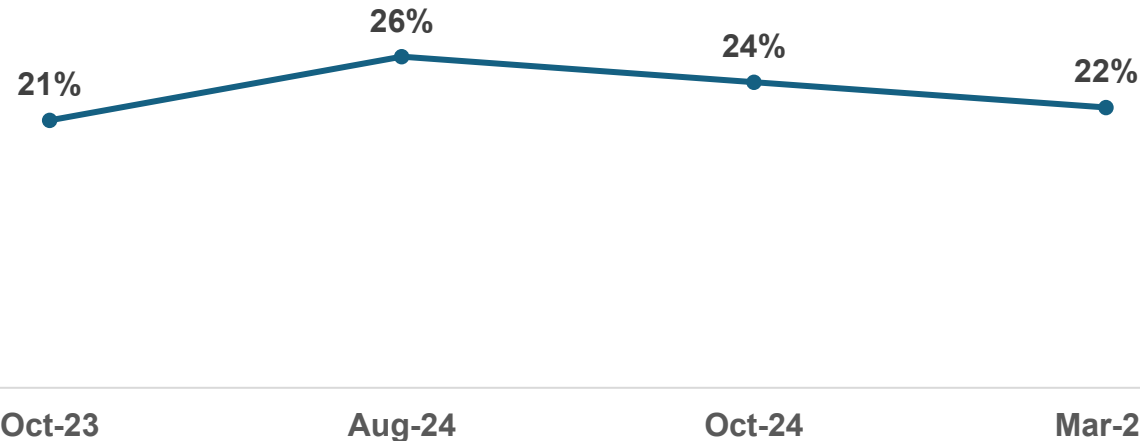
Minimal gender differences in the extent to which climate change concerns are considered when planning a holiday

Extent to which UK adults consider climate change when planning a holiday



Climate change influence trended over time

The extent to which concern about climate change influences UK adult's choices when planning a holiday (Top 2 box)



- **Overall trend:** Concern about climate change has remained a relatively minor but consistent factor in UK adults' holiday planning, with slight fluctuations in percentages.
- **Lowest and highest points:** The lowest proportion was 21% in Oct-23, while the highest was 26% in Aug-24.
- **Measure used:** Figures combine respondents who said concern about climate change influenced their holiday choices to a "very large extent" or a "large extent" (Top 2 box).

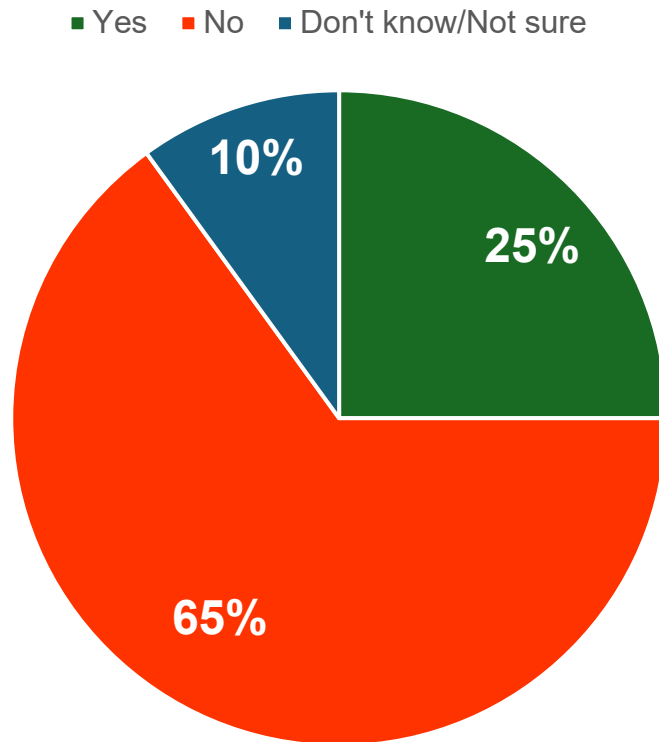


Accommodation

A woman walks through the woods with a treehouse pod in the background. Location: Chipping Norton, Oxfordshire, England,. © VisitBritain/Sarah Eichhorn

25% of UK adults have specifically looked for sustainable holiday accommodation

Percentage of UK adults who have specifically looked for sustainable holiday accommodation when planning a holiday

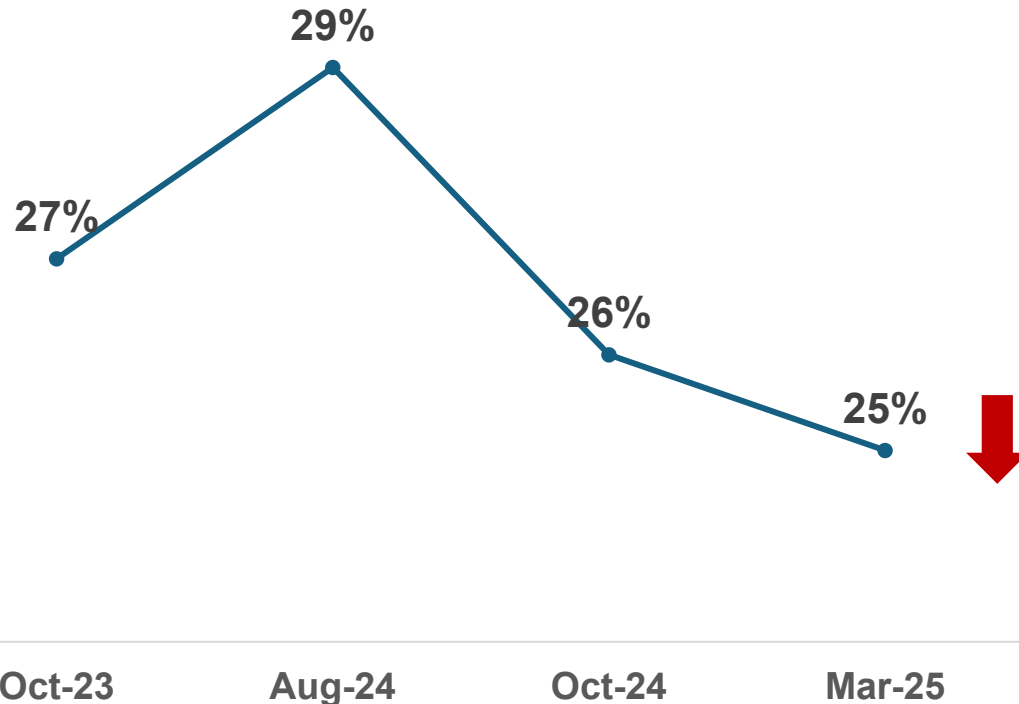


Younger adults are more likely to seek out sustainable accommodation compared to older age groups

- 50% of 25–34 year olds and 38% of 16–24 year olds said they had looked for sustainable accommodation.
- In contrast, only 16% of 55–64 year olds and just 6% of those aged 65+ said the same.

A downward trend in those looking for sustainable holiday accommodation

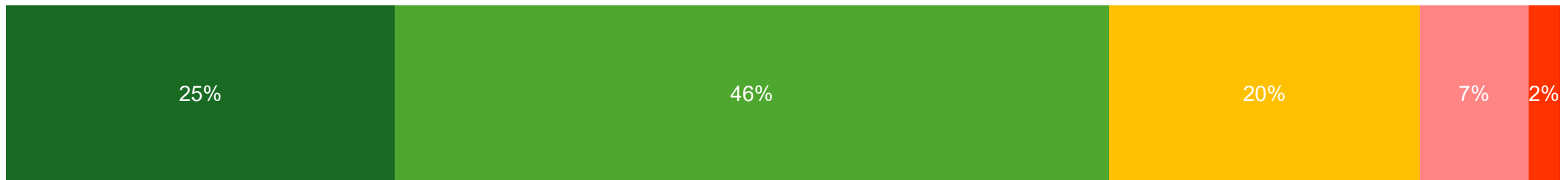
Percentage of UK adults who have looked for sustainable holiday accommodation in England



- **Overall trend:** There has been an downward trend across the two-year period, despite some fluctuations. There has been a 1% decrease since October 2023.
- **Lowest and highest points:** The lowest proportion was 25% in Mar-25, while the highest was Aug-24 with 29% looking for sustainable accommodation.
- **Measure used:** Those who responded “yes”, rather than “no” or “don’t know”

The majority of adults say it is easy to find sustainable accommodation in England (71%)

How easy UK adults find it to find sustainable accommodation in England



■ Extremely easy

■ Somewhat easy

■ Neither easy, nor difficult

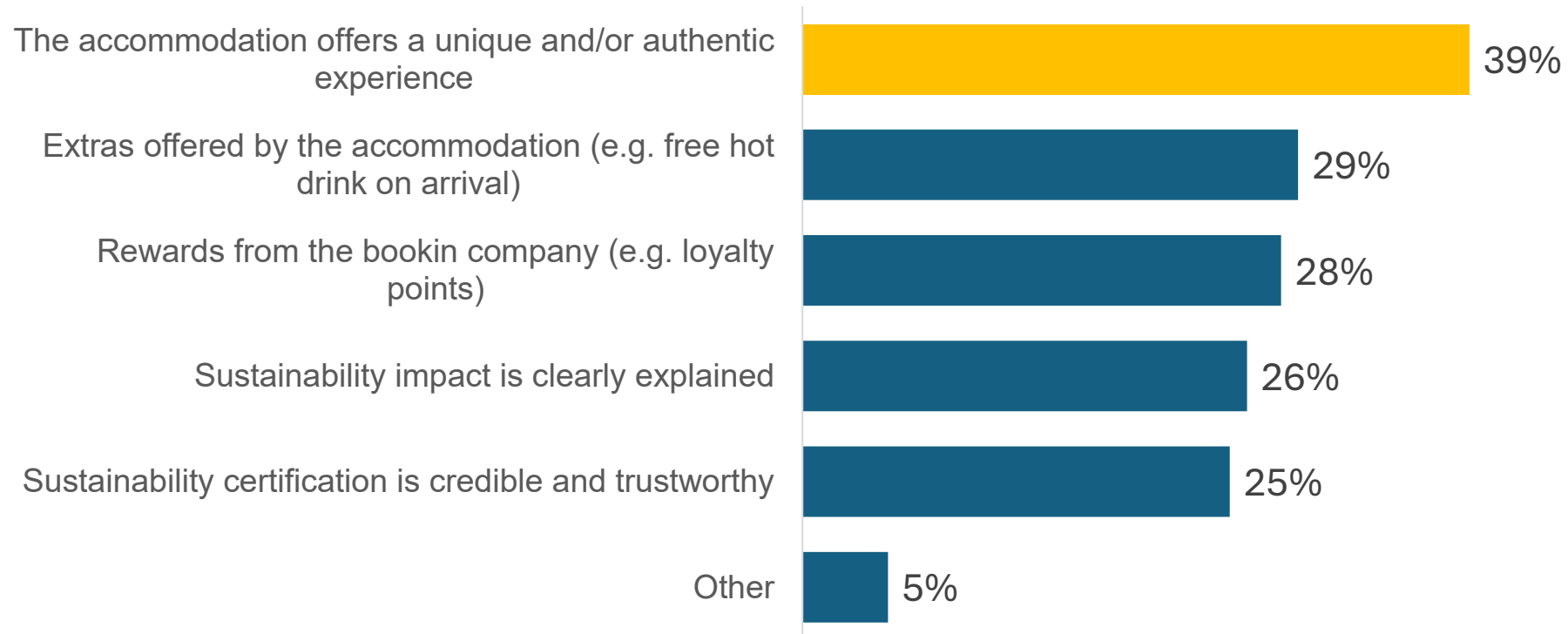
■ Somewhat difficult

■ Extremely difficult

- 71% of respondents find it easy to find sustainable holiday accommodation (25% extremely easy, 46% somewhat easy).
- Only 9% find it difficult (7% somewhat difficult, 2% extremely difficult).
- 20% are neutral (neither easy nor difficult).
- Ease of finding sustainable accommodation is highest among 25–34 year olds (79%) and lowest among those 65+ (48%).

Unique experiences drive sustainable stays

What encourages people to book sustainable holiday accommodation in England



QVB15d: If you could find sustainable holiday accommodation in England that met your requirements (e.g. cost, location, availability), what would be most likely to encourage you to book it?

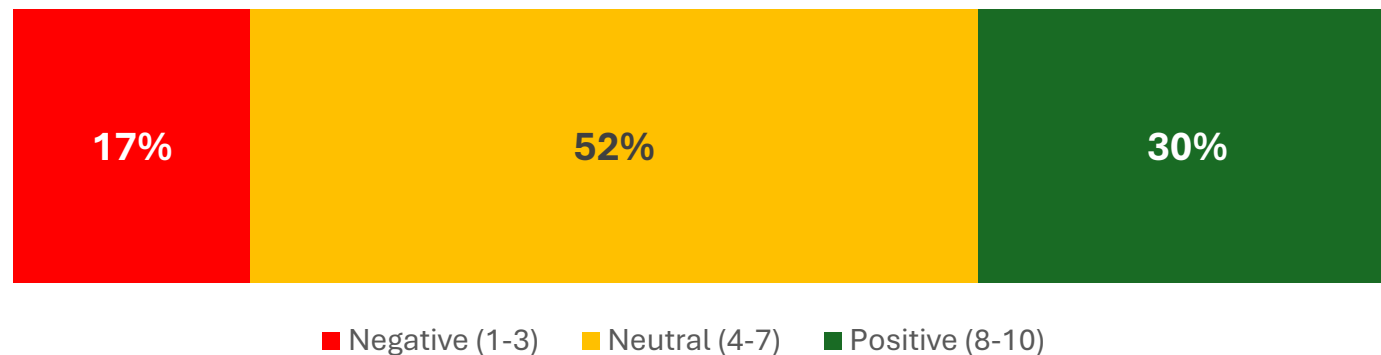


Overall sustainability travel trends

Countryside landscape with a lake below with boats. Location: Coniston, Cumbria, England © VisitBritain/Scott Salt.

Sustainable travel is important for many, but over 50% remain neutral

Agreement with the statement:
“Sustainable travel is really important to me”
(Top 3 box)



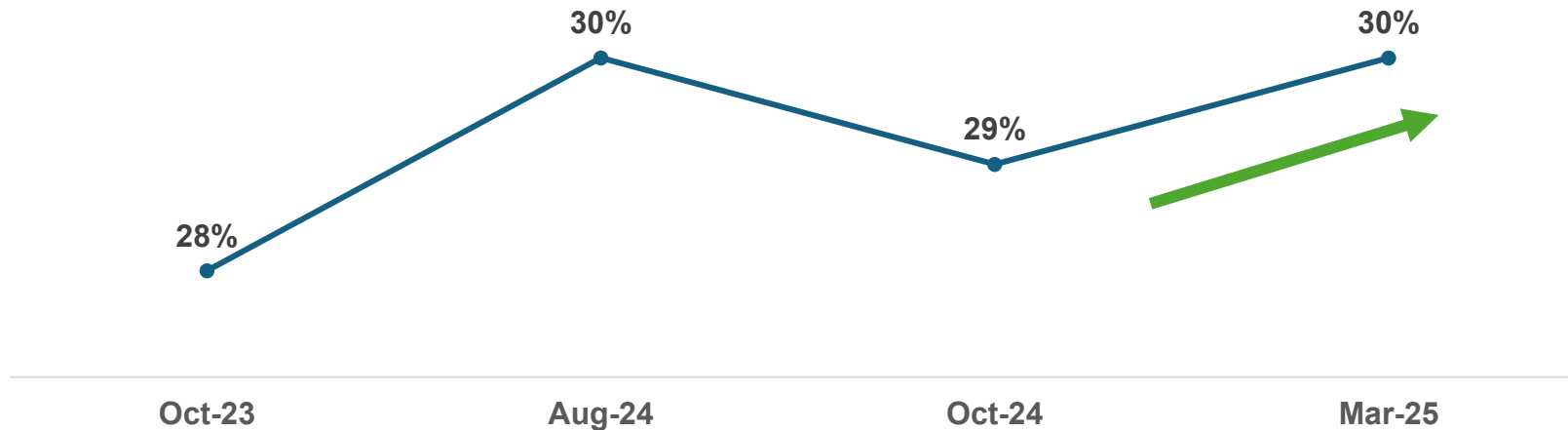
- Most respondents (57%) rated above 5, showing sustainable travel matters to many.
- Over half (52%) gave a neutral score of 5.
- 17% rated 1–3, indicating low importance.
- 31% rated 8–10, showing strong agreement.

QENV1: Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each?—
“Sustainable travel is really important to me”.

Sample: 1756 UK adults aged 16+

Importance of sustainable travel is rising

Importance of sustainable travel over time.
Top 3 Box (9–10 Ratings)



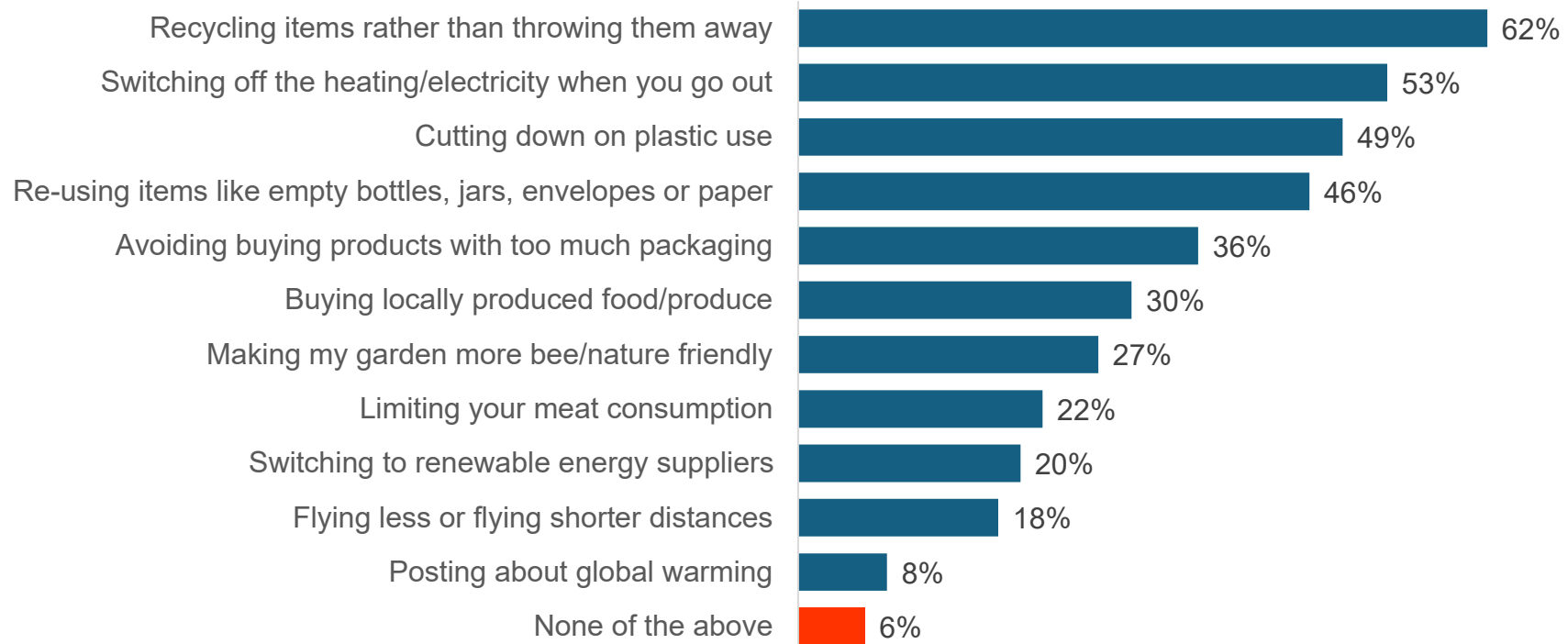
- Small fluctuations over time, but overall upward trend, with importance of sustainable travel increasing by 2% since Oct-23.
- Indicates a gradual strengthening of commitment to sustainable travel among UK adults.

QENV1: Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each? – “Sustainable Travel is really important to me”

Sample: 1755 UK adults aged 16+

Everyday habits are driving most environmental action but big lifestyle changes are less common

Environmental actions undertaken by UK adults



QENV3: Thinking about you, personally, which of the following are you currently doing to help the environment?

Sample: 1755 UK adults aged 16+



Thank You

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