

Sustainability Analysis

Domestic Sentiment Tracker: March 2026



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, resulting in a total sample size of 1,756 for this report.
- 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, unchanged from the same period of March last year. Younger adults are more likely to be influenced, with 45% of 25–34 year olds and 34% of 16–24 year olds considering climate change when planning a holiday, compared to just 11% of those aged 65+ and 12% 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.
- 29% of UK adults have specifically looked for sustainable holiday accommodation, and of these, 73% 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 (52%). The proportion strongly agreeing with the statement 'Sustainable travel is really important to me' has risen from 28% in October 2023 to 31% in March 2026, showing a steady increase in engagement.
- Everyday habits are the most common form of environmental action, with 57% recycling items rather than throwing them away, while fewer make bigger lifestyle changes such as flying less or shorter distances (17%) or switching to renewable energy suppliers (18%).

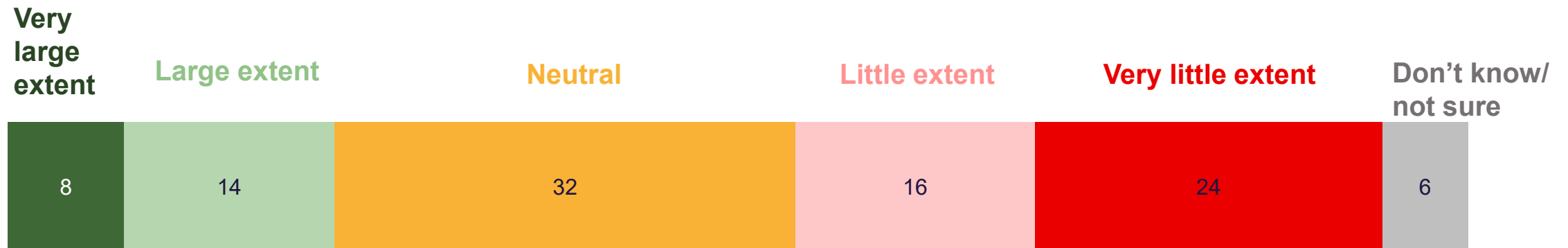


Sustainability influences on holiday choices

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

22% of UK adults say concerns about climate change influence their holiday planning to a large or very large extent; in contrast, nearly twice as many (40%) say it has little or very little impact

Extent to which UK adults consider climate change when planning a holiday, %, March 2026

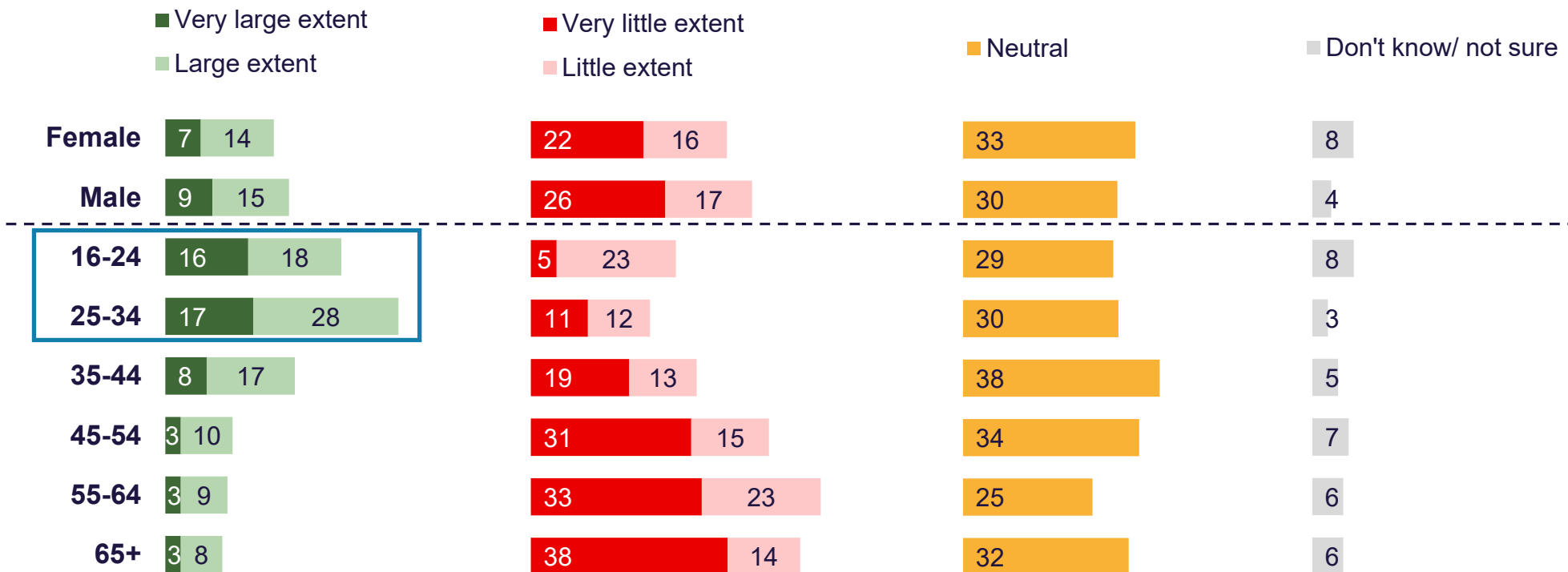


QVB15a: When planning a holiday or short break, to what extent does concern about climate change influence your choices?

Sample: 1756 UK adults aged 16+

Younger adults, particularly those aged 25-34, are more influenced by climate concerns when planning holidays compared to older age groups

Extent to which UK adults consider climate change when planning a holiday, %, March 2026

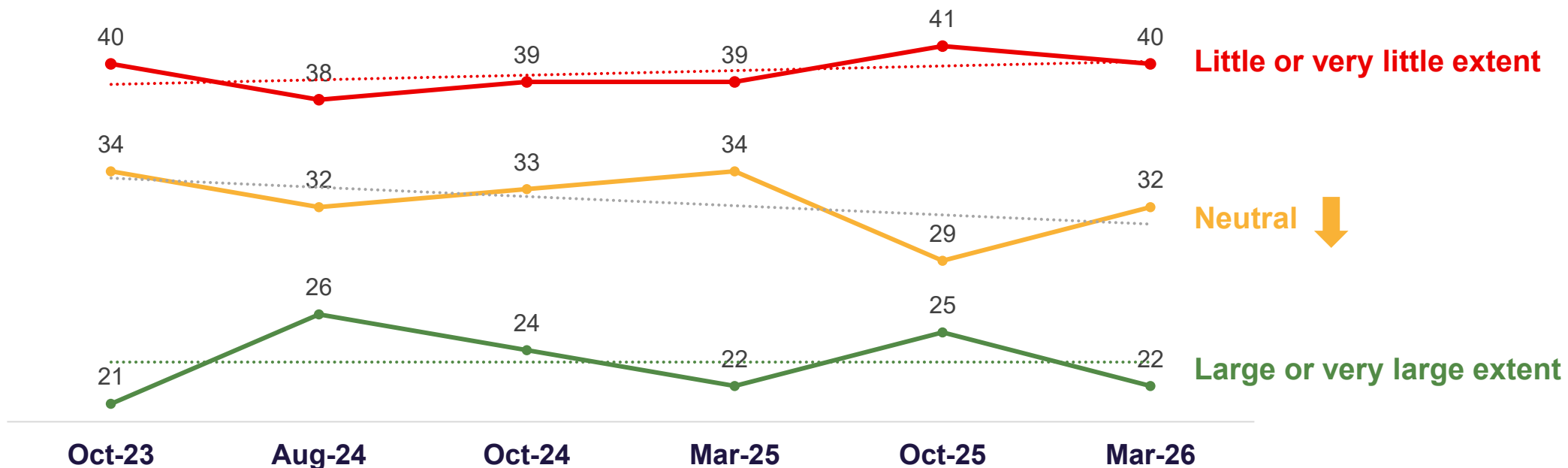


QVB15a: When planning a holiday or short break, to what extent does concern about climate change influence your choices?

Sample: 1756 UK adults aged 16+

The share of those who say climate change concerns influence their holiday planning remains unchanged from the same period last year (22%); however, those who feel neutral has seen a slight decline

Extent to which UK adults consider climate change when planning a holiday, %, trended over time



QVB15a: When planning a holiday or short break, to what extent does concern about climate change influence your choices?

Sample: 1756 UK adults aged 16+



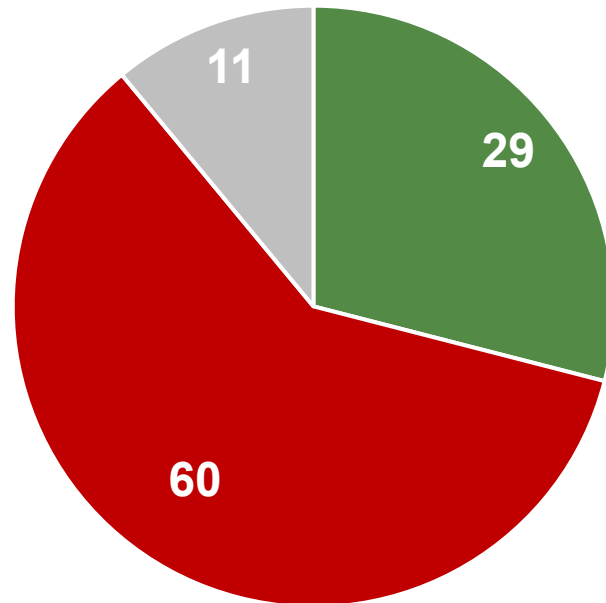
Accommodation

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

Nearly one third (29%) of UK adults have specifically looked for sustainable holiday accommodation in England

UK adults who have specifically looked for sustainable holiday accommodation when planning a holiday, %, March 2026

■ Yes ■ No ■ Don't know/Not sure



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

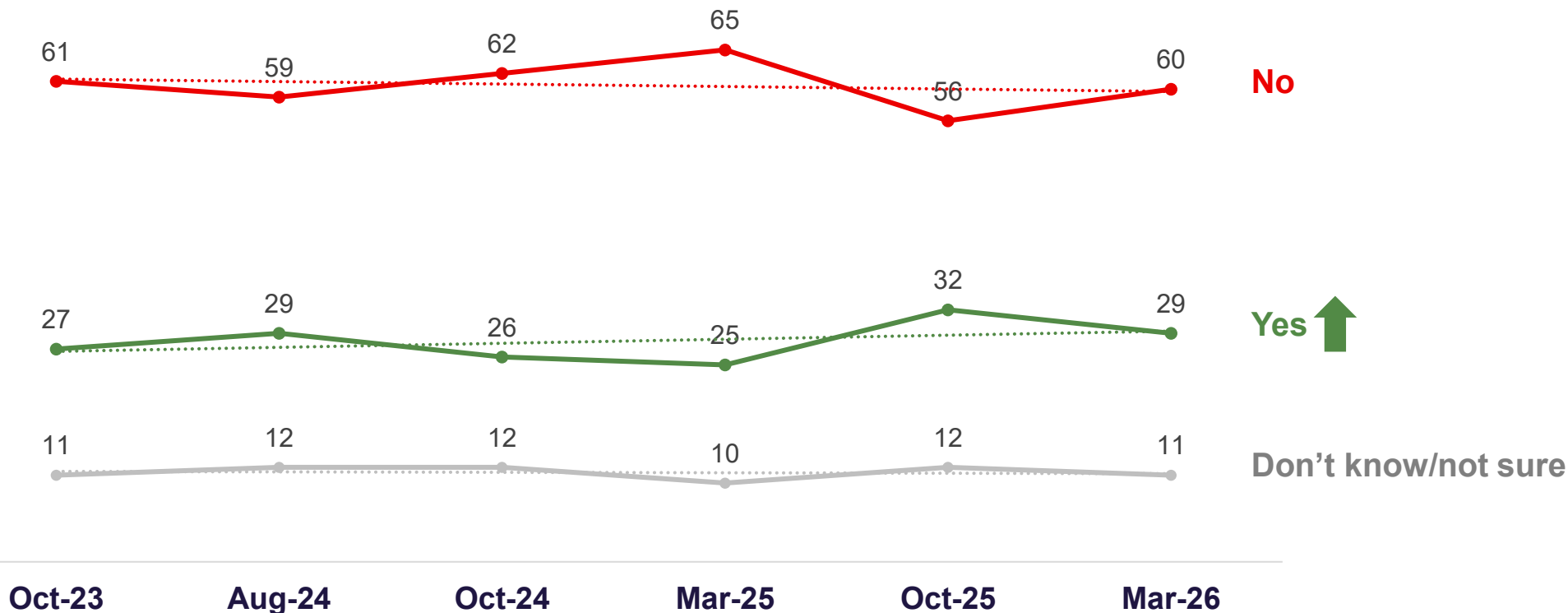
- 61% of 25-34 year olds and 39% of 16-24 year olds said they had looked for sustainable accommodation.
- In contrast, only 17% of 55-64 year olds and just 11% of those aged 65+ said the same.

QVB15b: When planning a holiday or short break, have you specifically looked for sustainable holiday accommodation in England?

Sample: 1756 UK adults aged 16+

While the majority report that they have not looked for sustainable holiday accommodation, there has been an upward trend overall in those who have done so in the past year

UK adults who have looked for sustainable holiday accommodation in England, %, trended over time

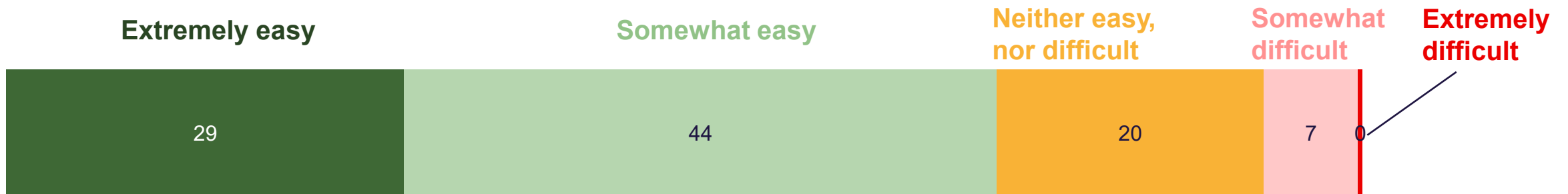


QVB15b: When planning a holiday or short break, have you specifically looked for sustainable holiday accommodation in England?

Sample: 1756 UK adults aged 16+

The majority have found it easy to find sustainable holiday accommodation in England

Ease of finding sustainable holiday accommodation in England, %, March 2026

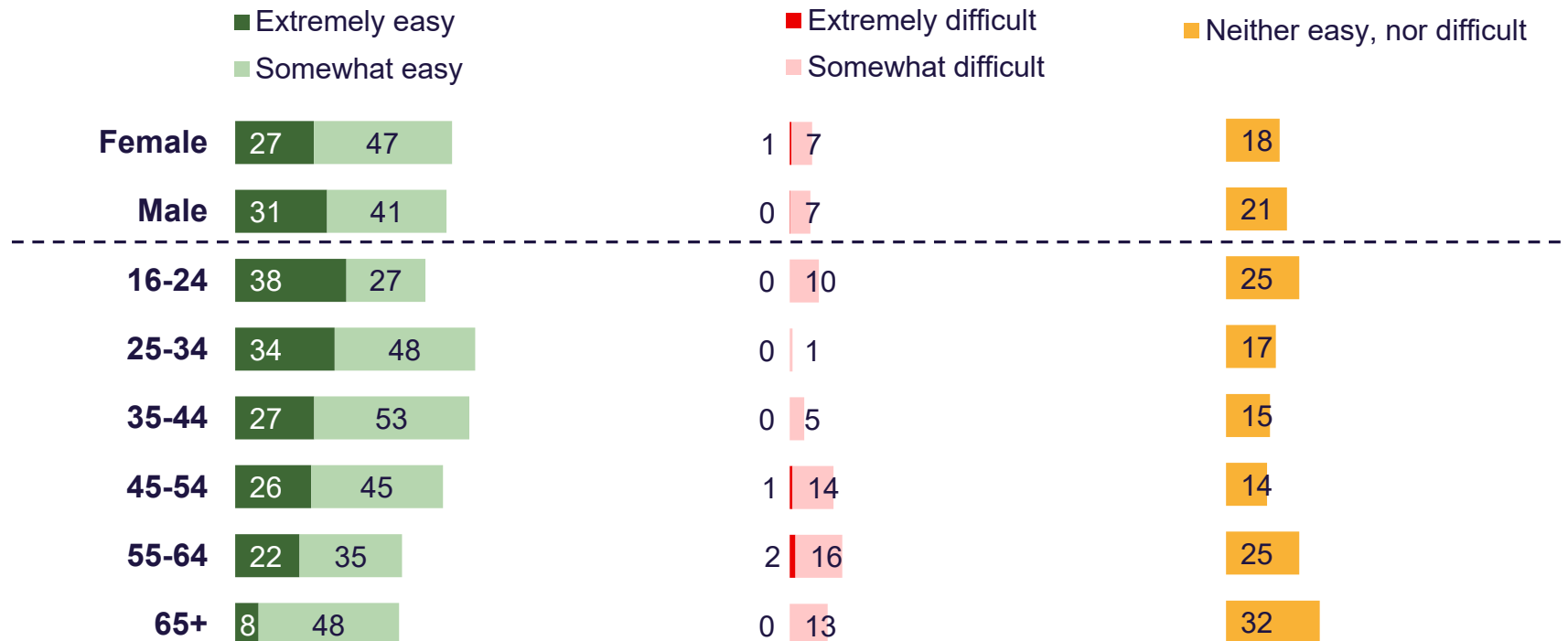


QVB15c: In your experience, how easy is it to find sustainable holiday accommodation in England?

Sample: 539 UK adults who have looked for sustainable accommodation

The ease of finding sustainable holiday accommodation is highest among 25–34 year olds (82%) and lowest among those aged 65+ (55%)

Ease of finding sustainable holiday accommodation in England, %, March 2026



QVB15c: In your experience, how easy is it to find sustainable holiday accommodation in England?

Sample: 29-227 UK adults who have looked for sustainable accommodation. Note smaller base sizes for some subgroups

The offer of unique or authentic experiences would drive bookings for sustainable stays

What encourages people to book sustainable holiday accommodation in England, %, March 2026



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?
Sample: 1756 UK adults aged 16+

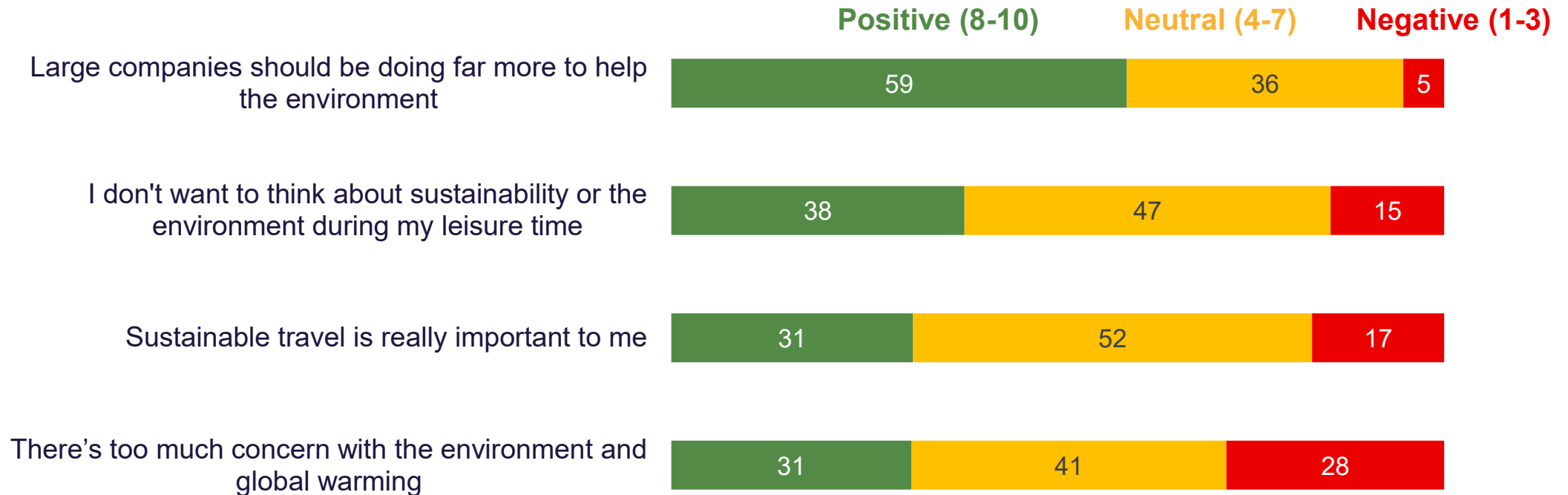


Overall sustainability travel trends

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

Over half (52%) remain neutral on the importance of sustainable travel, although almost a third (31%) state it's important to them. Most agree that companies should do more to help the environment (59%)

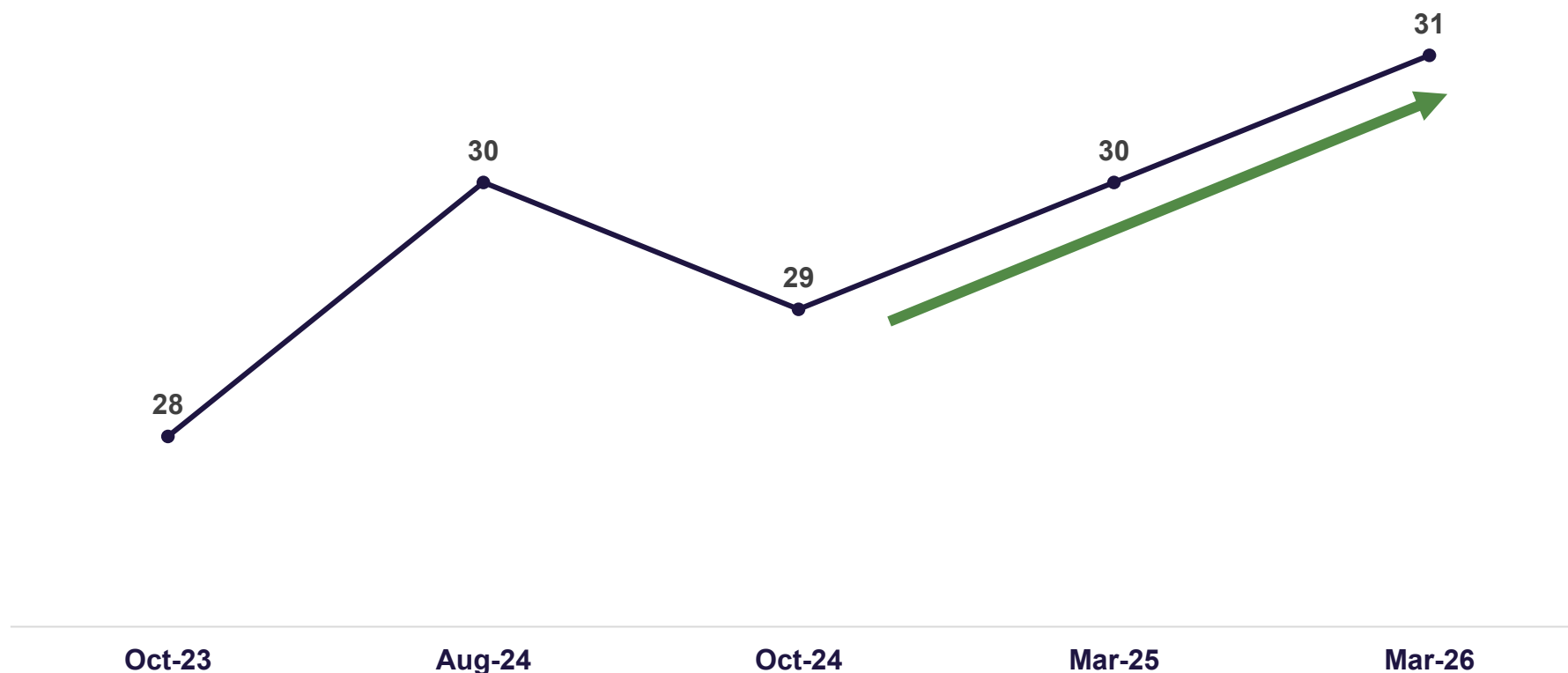
Agreement or disagreement with following sustainability statement, %, March 2026



QENV1: Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each?
 Sample: 1756 UK adults aged 16+

Nonetheless positive sentiment towards the importance of sustainable travel is tracking up, rising 3 percentage points from 28% in October 2023 to 31% in March 2026.

Agreement with the statement 'Sustainable travel is really important to me', %, trended over time



QENV1: Below are some statements other people have made about climate change and the environment. How much do you agree or disagree with each?
Sample: 1756 UK adults aged 16+

Environmental action is largely driven by everyday habits, most commonly recycling (57%), whilst big lifestyle changes are less widely adopted

Environmental actions undertaken by UK adults, %, March 2026

