Are Staycations here to stay?
What were the predictions for summer 2022?

Sir David Michels (President of the Tourism Alliance), Financial Times, 25th June 2022

Simon Calder, The Independent, 9th September 2021
Compared to summer 2021, the proportion of UK adults who took a domestic overnight trip during summer 2022 declined.

Source: VisitEngland Domestic Sentiment Tracker
Why wasn’t this year as good as 2021 in terms of staycations?
1. SWITCH TO OVERSEAS
Overall, domestic and overseas travel combined, summer 2022 was in line with 2021.

% OF UK ADULTS WHO TOOK UK AND/OR OVERSEAS OVERNIGHT TRIPS, OCTOBER FIELDWORK

July to September 2021

34% took a domestic/overseas trip

July to September 2022

35% took a domestic/overseas trip

Source: VisitEngland Domestic Sentiment Tracker
So the main reason for decrease in domestic travel is most likely the switch to overseas trips.

Source: VisitEngland Domestic Sentiment Tracker
For those who did holiday in the UK, fewer UK adults went to the South West, which may be driven by a shift to seaside holidays overseas, rather than in the UK.

DESTINATION REGION OF MOST RECENT UK OVERNIGHT TRIP BETWEEN JULY AND AUGUST, PERCENTAGE, SEPTEMBER FIELDWORK, UK

Source: VisitEngland Domestic Sentiment Tracker
2. DISPLACEMENT EFFECT OF 2021
In Q1 2021, travel was restricted, resulting in a ‘squeezed’ trip-taking window later in 2021... which created an artificially high benchmark for domestic summer.

% OF UK ADULTS WHO TOOK UK OVERNIGHT TRIPS, OCTOBER FIELDWORK

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2022</th>
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<tbody>
<tr>
<td>Net: January to September</td>
<td>42</td>
<td>50</td>
</tr>
<tr>
<td>January to March</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>April to June</td>
<td>19</td>
<td>21</td>
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<td>July to September</td>
<td>30</td>
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% OF UK ADULTS WHO TOOK OVERSEAS OVERNIGHT TRIPS, OCTOBER FIELDWORK

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<tr>
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<th>2021</th>
<th>2022</th>
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<tr>
<td>Net: January to September</td>
<td>17</td>
<td>31</td>
</tr>
<tr>
<td>January to March</td>
<td></td>
<td></td>
</tr>
<tr>
<td>April to June</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>July to September</td>
<td>7</td>
<td>14</td>
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Source: VisitEngland Domestic Sentiment Tracker
Families are showing the largest drop in domestic overnight trips in summer 2022, vs 2021. They were probably most keen to go on a holiday in summer 2021.

Source: VisitEngland Domestic Sentiment Tracker
3. FINANCIAL CONCERNS
More and more people’s finances are being ‘hit hard’.

PERSONAL FINANCES AS AN IMPACT OF....

<table>
<thead>
<tr>
<th></th>
<th>COVID</th>
<th>COST OF LIVING CRISIS</th>
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<tbody>
<tr>
<td></td>
<td>January</td>
<td>February</td>
</tr>
<tr>
<td>I've been hit hard</td>
<td>14</td>
<td>15</td>
</tr>
<tr>
<td>I'm cautious</td>
<td>37</td>
<td>38</td>
</tr>
<tr>
<td>I'm alright</td>
<td>49</td>
<td>47</td>
</tr>
</tbody>
</table>

Source: VisitEngland Domestic Sentiment Tracker
Trip intentions for summer 2022 were strong, however, not as many did actually take their trip.

<table>
<thead>
<tr>
<th></th>
<th>Summer 2021</th>
<th>Summer 2022</th>
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<tbody>
<tr>
<td>Intended a trip</td>
<td>34%</td>
<td>46%</td>
</tr>
<tr>
<td>Taken a trip</td>
<td>30%</td>
<td>25%</td>
</tr>
</tbody>
</table>

GAP: 21%

Source: VisitEngland Domestic Sentiment Tracker
Last minute bookings and last minute cancellations have been on the rise, especially in recent months.

**DEMAND**

In January 2022, 46% UK adults said ‘free cancellations’ are essential.

**ENABLER**

Covid pandemic accelerated the evolution and use of digital channels for bookings. It is now extremely easy and convenient to make a booking, as well as to cancel an existing booking.

**RESULT**

Last minute booking and cancellations are on the rise over the past few years but even more so over the recent months.

Source: VisitEngland Domestic Sentiment Tracker
And if the trip goes ahead, UK adults looked for money saving options, including free activities to do on their holidays, cheaper accommodation and spending less on eating out.

COST OF LIVING CRISIS’ IMPACT ON UK HOLIDAYS AND SHORT BREAKS, PERCENTAGE, JULY 2022 FIELDWORK

- Look for more ‘free things’ to do: 32%
- Choose cheaper accommodation: 32%
- Spend less on eating out: 31%
- Cut back on buying gifts/shopping at the destination: 26%
- Choose self-catering accommodation: 19%
- Visit fewer visitor attractions: 18%
- Take fewer UK short breaks/holidays: 18%
- Do fewer activities: 17%
- Travel less at the destination: 17%

Source: VisitEngland Domestic Sentiment Tracker
4. WEATHER CONDITIONS
The UK’s weather may also have played a role in driving travel behavior, this summer’s temperatures crossed the ideal limits making indoor and outdoor activity less likely.

**HIGHEST RECORDED TEMPERATURES BY MONTH, DEGREES CELSIUS, UK**

Source: Met Office & National Trust Climate Research

**National Trust Climate Research:**
The optimum weather for a National Trust **day out** is 21°C
Projecting into the future
UK adults feel more comfortable with overseas travel, so considering the impact of Covid, overseas trip intentions could grow next summer. However, personal finances will play a key role...

**COMFORT GAP: THE DIFFERENCE BETWEEN COMFORT LEVELS NOW AND BEFORE THE PANDEMIC, UK**

Source: BVA BDRC Consumer Sentiment tracker
... overseas holidays are more likely to be sacrificed than UK holidays.

THE TOP 5 ACTIVITIES MOST LIKELY TO CUT BACK ON DUE TO THE ‘COST-OF-LIVING’ CRISIS, PERCENTAGE OF ALL WHO DO EACH ACTIVITY, OCTOBER FIELDWORK, UK

- Restaurants: 31%
- Holidays overseas: 28%
- Clothes shops: 27%
- Pubs or bars: 23%
- Theme parks, zoos, farm attractions: 22%
- Cinemas: 20%
- Cafes or coffee shops: 18%
- Festivals: 18%
- Theatres: 17%
- Holidays in the UK: 16%
- Gaming: 16%
- Attraction memberships: 16%

Source: BVA BDRC Consumer Sentiment tracker
Fewer UK adults now saying they would choose domestic over holidays overseas. There is also a growing proportion of those undecided.

DIFFERENCE IN SHORT BREAK/HOLIDAY CHOICES IN THE NEXT 6 MONTHS COMPARED TO PRE-PANDEMIC, PERCENTAGE, OCTOBER 2022, UK

- More likely to choose UK than overseas
- More likely to choose overseas than UK
- Broadly the same as pre-pandemic
- Don’t know/It depends on the situation

Source: VisitEngland Domestic Sentiment Tracker, October 2022
Domestic holidays have clear advantages: more likely to be perceived as cheaper than overseas, plus, offering reduced stress linked to planning and travelling to the destination.

**TOP 5 reasons for UK preference**
1. UK holidays are easier to plan (66%)
2. UK holidays are cheaper (53%)
3. To avoid long queues at airports / cancelled flights (45%)
4. Shorter / quicker travel (44%)
5. Uncertainty around restrictions at overseas destinations (35%)

**TOP 5 reasons for Overseas preference**
1. Better weather (40%)
2. I want to visit new places (38%)
3. I want to explore other cultures (31%)
4. Overseas holidays are cheaper (24%)
5. I’m prioritising overseas trips after missing out during the pandemic (23%)

Source: VisitEngland Domestic Sentiment Tracker, October 2022
While 40% choose overseas holidays because of the weather, it is not a deal breaker.

The weather affects the experience – but not as much as we might expect!

<table>
<thead>
<tr>
<th>Weather on Holiday</th>
<th>Good</th>
<th>Mixed</th>
<th>Poor</th>
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<tbody>
<tr>
<td></td>
<td>39%</td>
<td>50%</td>
<td>10%</td>
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<table>
<thead>
<tr>
<th>Holiday Experience</th>
<th>% Excellent/Very Good</th>
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<tr>
<td></td>
<td>90%</td>
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<tr>
<td></td>
<td>85%</td>
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<td></td>
<td>72%</td>
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Source: VisitEngland research on Staycations, 2012
Learning from past, as a result of 2008 credit crunch, there was an increase in staycations, and the staycations trend continued for next few years after.

Experiencing staycations has a positive impact on attitudes to holidaying in England, this tends to create momentum into the next few years.

Source: VisitEngland research on Staycations, 2012
In conclusion...
Looking forward, domestic holidays trend is likely to continue into 2023. Making up for missed overseas travel during pandemic restrictions is a general driver, with better weather overseas, exploring new places, etc. Financial pressure on choices and decisions also plays a role. Pandemics and cost of living crises driving staycations is another factor. Outcomes include Slight impact (however declining) as more UK adults would feel comfortable to travel overseas. Ongoing factors, no significantly different impact on 2023 vs 2022 and 2021. Staycations momentum (similar to 2008 recession). People will look for cheaper accommodation and reducing their spend while on holidays. Inconvenient exchange rates. Overall, overseas travel could benefit in 2023, while domestic travel could benefit as well.
THANK YOU

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