Domestic Sentiment Tracker: February 2023

Published: February 2023
Fieldwork Period: 1\textsuperscript{st} to 7\textsuperscript{th} February 2023

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 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 February 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.

– **February to March 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between February and March 2023
– **April to June 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 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+
February 2023: Scorecard of Key Metrics

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>February 2023</th>
<th>Change since January 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of UK adults stating ‘WORST IS STILL TO COME’ in regard to cost of living crisis</td>
<td>62%</td>
<td>-9%*</td>
</tr>
<tr>
<td>Proportion intending a UK overnight trip at any point <strong>in the next 12 months</strong></td>
<td>72%</td>
<td>+2%</td>
</tr>
<tr>
<td>Proportion intending an overseas overnight trip <strong>at any point in the next 12 months</strong></td>
<td>51%</td>
<td>-1%</td>
</tr>
<tr>
<td>Preference for UK over overseas in the next 6 months (vs pre-pandemic)</td>
<td>36%</td>
<td>+5%*</td>
</tr>
<tr>
<td>Took a domestic overnight trip in the past 12 months (Feb 2022 – Jan 2023)</td>
<td>61%</td>
<td>0%</td>
</tr>
<tr>
<td>Net proportion of UK trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]</td>
<td>4%</td>
<td>-3%</td>
</tr>
<tr>
<td>Net proportion of overseas trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]</td>
<td>-20%</td>
<td>-5%*</td>
</tr>
<tr>
<td>Reduce the number of UK overnight trips due to cost of living crisis [NET ‘fewer’, ‘not go’, ‘go day trips instead’]</td>
<td>30%</td>
<td>+1%</td>
</tr>
<tr>
<td>Reduce the number of day trips due to cost of living crisis [NET ‘fewer’, ‘not go on day trips’]</td>
<td>34%</td>
<td>0%</td>
</tr>
<tr>
<td>Top 3 barriers to taking a UK overnight trip in the next 6 months</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Rising cost of living; 2nd Personal finances; 3rd Rising costs of holidays</td>
<td></td>
<td>No change</td>
</tr>
</tbody>
</table>

* Represents a statistically significant change on previous wave
1. Current General Sentiment
With regards to the cost of living crisis, 1 in 4 now perceive that things are going to stay the same in the next few months.

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. February 2023 = 1,757

- The worst is still to come
- Things are going to stay the same
- The worst has passed
The majority of UK adults (74%) are either cautious (47%) or have been ‘hit hard’ (27%) by the cost of living crisis.

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. February 2023 = 1,757.
2. Trip Intentions: UK and Overseas
Overnight domestic trip intentions are above the levels anticipated back in February 2022, 11% planning a trip in February to March 2023, and 33% between April and June.

Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, February 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. February 2022 = 1,756, February 2023 = 1,757. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. *February 2022 fieldwork was within the period of time when Omicron was highly prevalent
For **overnight overseas trips**, intentions are also much higher than in February 2022, in particular between July and September.

**Figure 5b.** Proportion anticipating going on any overnight overseas trips, Percentage, February 2023, UK

- At any point in the next 12 months: February 2023 = 51%, February 2022 = 43%
- February-March trip: February 2023 = 6%, February 2022 = 5%
- April-June trip: February 2023 = 19%, February 2022 = 15%
- July-September trip: February 2023 = 30%, February 2022 = 24%
- No plans / would never do this: February 2023 = 45%, February 2022 = 52%

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. February 2022 = 1,756, February 2023 = 1,757. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Long term domestic overnight trip intentions have slightly increased and overseas ones are stable compared to January 2023.

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, February 2023, UK*

<table>
<thead>
<tr>
<th>Nov-21</th>
<th>Dec-21</th>
<th>Jan-22</th>
<th>Feb-22</th>
<th>Mar-22</th>
<th>Apr-22</th>
<th>May-22</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td>55</td>
<td>58</td>
<td>59</td>
<td>61</td>
<td>60</td>
<td>59</td>
</tr>
<tr>
<td>41</td>
<td>44</td>
<td>40</td>
<td>43</td>
<td>44</td>
<td>43</td>
<td>44</td>
</tr>
</tbody>
</table>

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. February 2023 = 1,757. 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 above pre-pandemic levels – overseas intentions still way below.

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

Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, February 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. February 2023 = 1,757.
36% 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’ (60%).

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

36% more likely to choose UK

20% more likely to choose overseas

27% broadly the same as pre-pandemic

17% don’t know/it depends on the situation

TOP 5 reasons for UK preference
1. UK holidays are easier to plan (60%)
2. UK holidays are cheaper (48%)
3. Shorter / quicker travel (41%)
4. To avoid long queues at airports/cancelled flights (35%)
5. I want to take holidays in places I am familiar with (30%)

TOP 5 reasons for Overseas preference
1. Better weather (40%)
2. I want to visit new places (36%)
3. I want to explore other cultures (31%)
4. Overseas holidays are cheaper (28%)
5. I’m prioritising overseas trips after missing out during the pandemic (26%)

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. February 2023 = 1,757. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? February 2023 = 616. VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? February 2023 = 363
The proportion of those more likely to choose domestic over holidays overseas has increased in the last month.

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

<table>
<thead>
<tr>
<th>Month</th>
<th>More likely to choose UK than overseas</th>
<th>More likely to choose overseas than UK</th>
<th>Broadly the same as pre-pandemic</th>
<th>Don’t know/It depends on the situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2022 data</td>
<td>39</td>
<td>21</td>
<td>26</td>
<td>15</td>
</tr>
<tr>
<td>July 2022 data</td>
<td>40</td>
<td>20</td>
<td>22</td>
<td>18</td>
</tr>
<tr>
<td>Aug 2022 data</td>
<td>39</td>
<td>19</td>
<td>25</td>
<td>17</td>
</tr>
<tr>
<td>Sep 2022 data</td>
<td>34</td>
<td>21</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>Oct 2022 data</td>
<td>32</td>
<td>23</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>Nov 2022 data</td>
<td>34</td>
<td>23</td>
<td>26</td>
<td>18</td>
</tr>
<tr>
<td>Dec 2022 data</td>
<td>35</td>
<td>22</td>
<td>25</td>
<td>19</td>
</tr>
<tr>
<td>Jan 2023 data</td>
<td>31</td>
<td>20</td>
<td>30</td>
<td>19</td>
</tr>
<tr>
<td>Feb 2023 data</td>
<td>36</td>
<td>20</td>
<td>27</td>
<td>17</td>
</tr>
</tbody>
</table>

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. February 2023 = 1,757.
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, February 2023, UK

<table>
<thead>
<tr>
<th>Factor</th>
<th>November 2022 Data</th>
<th>December 2022 Data</th>
<th>January 2023 Data</th>
<th>February 2023 Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising cost of living</td>
<td>56%</td>
<td>57%</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>Personal finances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rising costs of holidays/leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK weather</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The cost of fuel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My general health</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited available annual leave</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None/ No barriers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NET: Costs and finances</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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. February 2023 = 1,757. *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 individual financial barriers vary slightly month on month, with a slight decline recorded in February.

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. February 2023 = 1,757.
Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of accommodation, despite a slight decline, 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

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: February 2023 = 1757.
UK adults plan to cut their overnight trip spending mainly on accommodation, activities and eating out. 30% will cut the number of trips, in line with data from the previous two waves.

Figure 13a. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, February 2023, UK, Full list

- Choose cheaper accommodation: 32%
- Look for more ‘free things’ to do: 28%
- Spend less on eating out: 28%
- Cut back on buying gifts/shopping at the destination: 23%
- Visit fewer visitor attractions: 18%
- Do fewer activities: 18%
- Travel when it’s cheaper (i.e. outside of busier time periods): 17%
- Take fewer UK short breaks/holidays: 16%
- Choose self-catering accommodation: 16%
- Stay with friends or relatives: 13%
- Take a holiday in the UK instead of overseas: 13%
- Take shorter UK short breaks/holidays: 12%
- Travel less at the destination: 10%
- Take day trips instead of UK short breaks/holidays: 10%
- Take UK short breaks/holidays closer to home: 10%
- Will not go on UK short breaks/holidays: 8%

The cost of living crisis isn’t likely to influence my UK short breaks/holidays at all: 25%

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: February 2023 = 1757.

Reduce the number of UK overnight trips

<table>
<thead>
<tr>
<th>November 2022</th>
<th>December 2022</th>
<th>January 2023</th>
<th>February 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ‘fewer’, ‘not go’, ‘go day trips instead’</td>
<td>36%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>
In terms of UK day trips, 29% of UK adults intend to look for more free things to do. 34% will reduce the number of day trips – in line with last wave.

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

- Look for more ‘free things’ to do: 29%
- Spend less on eating out: 26%
- Cut back on buying gifts/shopping: 25%
- Take fewer day trips: 24%
- Will travel when it’s cheaper (i.e. outside of busier time periods): 21%
- Visit fewer visitor attractions: 18%
- Take day trips closer to home: 18%
- Do fewer activities: 16%
- Will not go on day trips: 11%

The cost of living crisis isn’t likely to influence my day trips at all: 29%

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: February 2023 = 1757.
The top destination type for an overnight domestic trip up to April 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, February 2023, UK

<table>
<thead>
<tr>
<th>Feb’23 – Dec’23</th>
<th>Large city</th>
<th>Smaller City or Town</th>
<th>Traditional coastal/ seaside town</th>
<th>Rural coastline</th>
<th>Countryside or village</th>
<th>Mountains or hills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intend a trip / trips [%]</td>
<td>31</td>
<td>34</td>
<td>48</td>
<td>37</td>
<td>45</td>
<td>30</td>
</tr>
</tbody>
</table>

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: February 2023 = 1,757.
3. The Next Trip: Overnight and Day Trips
53% of UK adults have already booked their domestic trips for March, while 75% have already booked their overseas trips for March.

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

Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in March 2023? UK trip: March 2023 n = 93, April 2023 n = 159, May 2023 n = 166, June 2023 n = 159. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in March 2023? Base: Overseas trip: March 2023 n = 58, April 2023 n = 84, May 2023 n = 111, June 2023 n = 110.
Domestic March trips are mostly booked within a month of going, while overseas March trips are more likely to be booked 1 to 3 months ahead.

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

- Up to 1 month
- More than 1 month - 3 months
- More than 3 months - 5 months
- More than 5 months
- I am unlikely to book in advance
- Don’t know/Not sure

UK March 2023 trip  UK April 2023 trip  UK May 2023 trip  UK June 2023 trip  Overseas March 2023 trip  Overseas April 2023 trip  Overseas May 2023 trip  Overseas June 2023 trip

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: March 2023 n = 93, April 2023 n = 159, May 2023 n = 166, June 2023 n = 159. 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: March 2023 n = 58, April 2023 n = 84, May 2023 n = 111, June 2023 n = 110.
Between March and April, short breaks are more common than longer breaks. During May and June, longer breaks are more likely. Both comparable with figures reported a year ago.

**Figure 17.** Length of next UK holiday or short break by time period, Percentage, February 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 February 2023 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: March 2023 n = 93, April 2023 n = 159, May 2023 n=166, June 2023 n=159. UK trip 2021-2022: March 2022 n = 97, April 2022 n = 124, May 2022 n=117, June 2022 n=131
The South West is the most preferred UK overnight destination in both time periods. Fewer expect to visit London in February to March 2023 compared to a year ago.

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

Figure 19. Where planning on staying on next UK overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK

Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n = 706. 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.

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

- Own car: 55% (January 2023/February 2023 data), 54% (January 2022/February 2022 data)
- Train: 22% (January 2023/February 2023 data), 22% (January 2022/February 2022 data)
- Plane: 5% (January 2023/February 2023 data), 5% (January 2022/February 2022 data)
- Public bus/coach: 4% (January 2023/February 2023 data), 6% (January 2022/February 2022 data)
- Car - hired/rented/taxi: 3% (January 2023/February 2023 data), 3% (January 2022/February 2022 data)

Figure 21. Top 5 main modes of travel to destination for overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK

- Own car: 55% (January 2023/February 2023 data), 60% (January 2022/February 2022 data)
- Train: 18% (January 2023/February 2023 data), 15% (January 2022/February 2022 data)
- Car - hired/rented/taxi: 5% (January 2023/February 2023 data), 4% (January 2022/February 2022 data)
- Plane: 5% (January 2023/February 2023 data), 6% (January 2022/February 2022 data)
- Motor home/Campervan: 4% (January 2023/February 2023 data), 2% (January 2022/February 2022 data)

Question: QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All January 2022 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n = 988; February to March 2022 n = 348, April to June 2022 n = 706

FOR THE FULL LIST OF MODES OF TRANSPORT, PLEASE SEE THE PUBLISHED TABLES.
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 February to March 2023, Percentage, January 2023 to February 2023, UK

- Hotel / Motel / Inn: 49%
- Staying in a rented house or similar: 15%
- Friends or relatives home: 15%
- Guest house / Bed and breakfast: 13%
- Serviced apartment: 7%
- Static caravan - owned by you: 7%
- Hostel: 6%
- In someone else’s home on a commercial basis – rental of room only: 7%
- Staying in a rented flat or similar: 6%
- Static caravan - not owned by you: 6%

January 2023/February 2023 data

January 2022/February 2022 data

Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in April to June 2023, Percentage, January 2023 to February 2023, UK

- Hotel / Motel / Inn: 36%
- Staying in a rented house or similar: 19%
- Guest house / Bed and breakfast: 17%
- Friends or relatives home: 16%
- Static caravan - not owned by you: 5%
- Your second home / Timeshare: 9%
- Serviced apartment: 6%
- In someone else’s home on a commercial basis – rental of full property: 8%
- Hostel: 8%
- In someone else’s home on a commercial basis – rental of room only: 13%

January 2023/February 2023 data

January 2022/February 2022 data

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 January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706 See tables for full breakdown.
‘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 February to March 2023, Percentage, January 2023 to February 2023, UK

Figure 25. Visitor party make-up for trips taken from trip in April to June 2023, Percentage, January 2023 to February 2023, UK

Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All January 2023 to February 2023 respondents planning on taking a holiday or short break in the UK between February to March 2023 n = 404, April to June 2023 n =988; February to March 2022 n = 348, April to June 2022 n = 706. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.
The top motivation for an overnight trip in both time periods is ‘family time or time with my partner’.

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

- Family time or time with my partner: 45%
- To get away from it all and have a rest: 42%
- To connect with nature / be outdoors: 24%
- To celebrate a special occasion: 18%
- To travel somewhere new: 17%
- To spend time with friends: 14%
- To go somewhere where there was great food: 10%
- Because of a particular interest: 10%
- For adventure or a challenge: 8%
- For an active holiday, with exercise or sport: 8%
- To go somewhere luxurious: 7%
- To learn something new: 4%
- For a technology detox: 3%

Figure 27. Motivations for UK holidays and short breaks in April-June 2023, Percentage, February 2023, UK, Full list

- Family time or time with my partner: 45%
- To get away from it all and have a rest: 40%
- To connect with nature / be outdoors: 24%
- To travel somewhere new: 17%
- To spend time with friends: 17%
- For adventure or a challenge: 12%
- To go somewhere where there was great food: 12%
- To celebrate a special occasion: 11%
- For an active holiday, with exercise or sport: 9%
- To go somewhere luxurious: 8%
- To learn something new: 8%
- Because of a particular interest: 7%
- For a technology detox: 4%
In both time periods, ‘trying local food and drink’ and ‘walking, hiking’ are the top activities.

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

- Trying local food and drink: 42%
- Walking, Hiking or Rambling: 41%
- Visit heritage sites: 24%
- Visit cultural attractions: 23%
- Nature and wildlife experiences: 22%
- Explore scenic areas by car: 18%
- Learn about local history and culture: 15%
- Visit family attractions: 12%
- Water sports: 10%
- Experience the nightlife: 9%
- Health or wellbeing experiences: 9%
- Speciality shopping: 8%
- Adventure activities: 6%
- Visit locations featured in TV, film or…: 5%
- Creative or artistic pursuits: 3%
- Cycling or mountain biking: 2%
- Golf: 1%
- Conservation or volunteering activities: 1%

Figure 29. Activities for UK holidays and short breaks in April-June 2023, Percentage, February 2023, UK, Full list

- Walking, Hiking or Rambling: 37%
- Trying local food and drink: 36%
- Visit heritage sites: 33%
- Explore scenic areas by car: 27%
- Visit cultural attractions: 24%
- Nature and wildlife experiences: 22%
- Visit family attractions: 19%
- Learn about local history and culture: 19%
- Experience the nightlife: 14%
- Speciality shopping: 12%
- Water sports: 10%
- Adventure activities: 9%
- Health or wellbeing experiences: 9%
- Creative or artistic pursuits: 8%
- Visit locations featured in TV, film or…: 7%
- Cycling or mountain biking: 6%
- Golf: 4%
- Conservation or volunteering activities: 4%

Question: VB6fii. 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 February to March 2023 n = 188, April to June 2023 n =484.
Note: Multiple choice question. Totals may exceed 100%.
In the first week of February, 15% of UK adults intend to take any day trip by the end of the month. ‘Countryside or village’ is the top day trip destination for the next 6 months.

Figure 30. Next UK day trip intention between January 2023 and September 2023, Cumulative percentages, February 2023, UK

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

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: February 2023 = 1,757
4. Past UK and Overseas Trips
Around 3 in 5 (61%) have taken a UK overnight trip between February 2022 and January 2023, while only 35% have taken an overseas overnight trip in that period.

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

Question: VB13a/1. 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. February 2023 = 1,757.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip.
The North West of England (16%) and London (15%) were the most popular destination for trips in the past three months. 36% say they stayed with / visited friends or relatives.
5. Overnight Business Trip Intentions (January 2023 data)

Note: * Overnight Business Trip Intentions questions are asked every second month
16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Team building’ is the leading reason (31%), followed by ‘meeting 6 or more people’ (at 27%).

Figure 34. Proportion anticipating an overnight business trip in next 3 months, Percentage, January 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, January 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: January 2023 respondents currently in employment n = 1,271. All taking a business trip n=237.
Methodology & Further Data
Methodology

- This report presents findings from the February 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.
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](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.