

# Domestic Sentiment Tracker: Profiling Report

Published: January 2023

Fieldwork Period: October to December 2022

UK Results

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# Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a monthly COVID-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken.

The tracker was conducted weekly for 13 consecutive weeks from May 2020 to August 2020, fortnightly from September 2020 to September 2021, and monthly from November 2021 onwards. Each wave is based on a UK nationally representative sample of c1,500 adults aged 16+, with a boost sample for Scotland and Wales.

This report is a deep dive into those who are looking to take a trip in autumn (and to a lesser extent winter) as well as more details on demographic differences than the monthly report.

**The findings in this report are based on aggregating data from the October to December 2022 fieldwork.**

Fieldwork periods are as follows: October (3<sup>rd</sup> to 9<sup>th</sup>); November (1<sup>st</sup> to 7<sup>th</sup>); December (1<sup>st</sup> to 7<sup>th</sup>).

# Definitions used within this report (1)

**Chapter 2** in this report looks at trip Intenders with the following definitions:

1. **Winter Intenders:** UK adults who intend to take a domestic overnight trip between January and March 2023
2. **Spring Intenders:** UK adults who intend to take a domestic overnight trip between April and June 2023
3. **Non-Intenders:** UK adults who do not currently intend to take any short breaks or holidays of 4+ nights over the next year

**Chapter 3** looks at the profile and behaviour of **Winter Intenders by destination type**. All individual destination types have sufficient base sizes among Winter Intenders to show each destination type's profile. Destinations types included:

- Traditional coastal/ seaside town
- Countryside or village
- Rural coastline
- Smaller city or town
- Large city
- Mountains or hills

# Definitions used within this report (2)

In **Chapter 4**, investigating the intent to visit towns and cities, the following definitions have been used:

- **City Intenders:** Winter Intenders planning on taking an overnight trip to a 'large city' in the Winter period
- **City Non-Intenders:** Winter Intenders not planning on taking an overnight trip to a 'large city' in the Winter period

**Chapter 5** looks at Winter intentions by destination region. All destination regions (below) are included but please note low base sizes on some:

- North West
- North East
- Yorkshire and The Humber
- West Midlands
- East Midlands
- East of England
- London
- South East
- South West
- Scotland
- Wales

# Definitions used within this report (3)

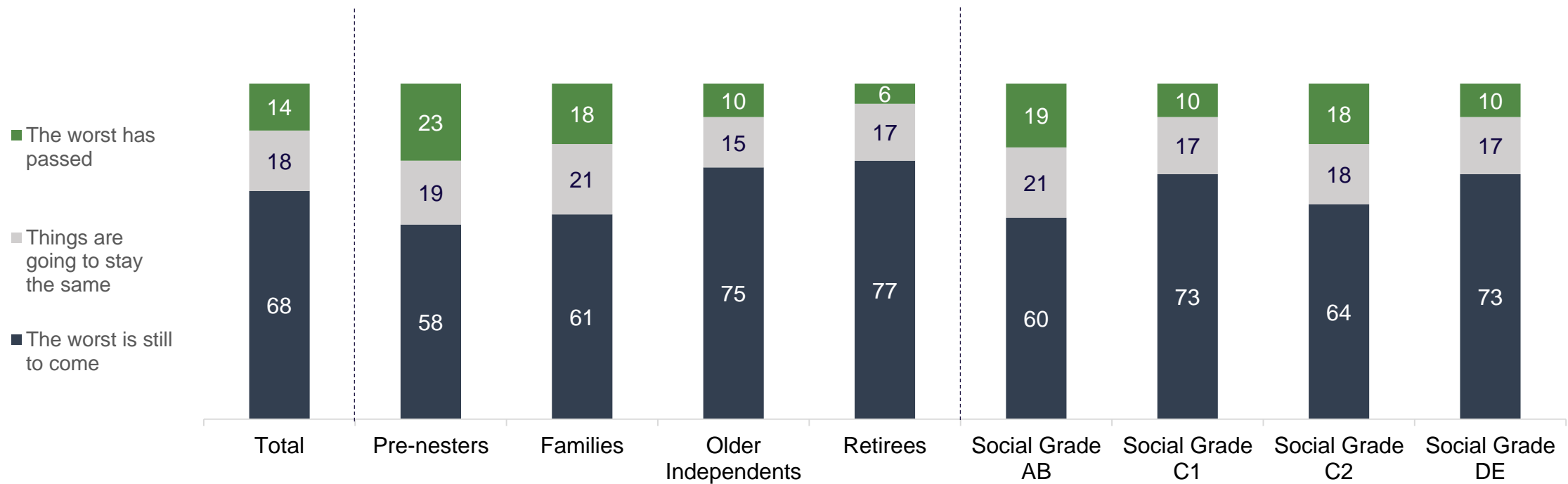
To deliver clearer profiles, we also segment by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-Nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older Independents:** Aged 35-64 with no children in household
- **Retirees:** Aged 65+.

# 1. The Rising Cost of Living and Covid

# Overall two thirds are concerned about the cost of living crisis, thinking ‘the worst is still to come’, with Retirees and Older Independents the most pessimistic.

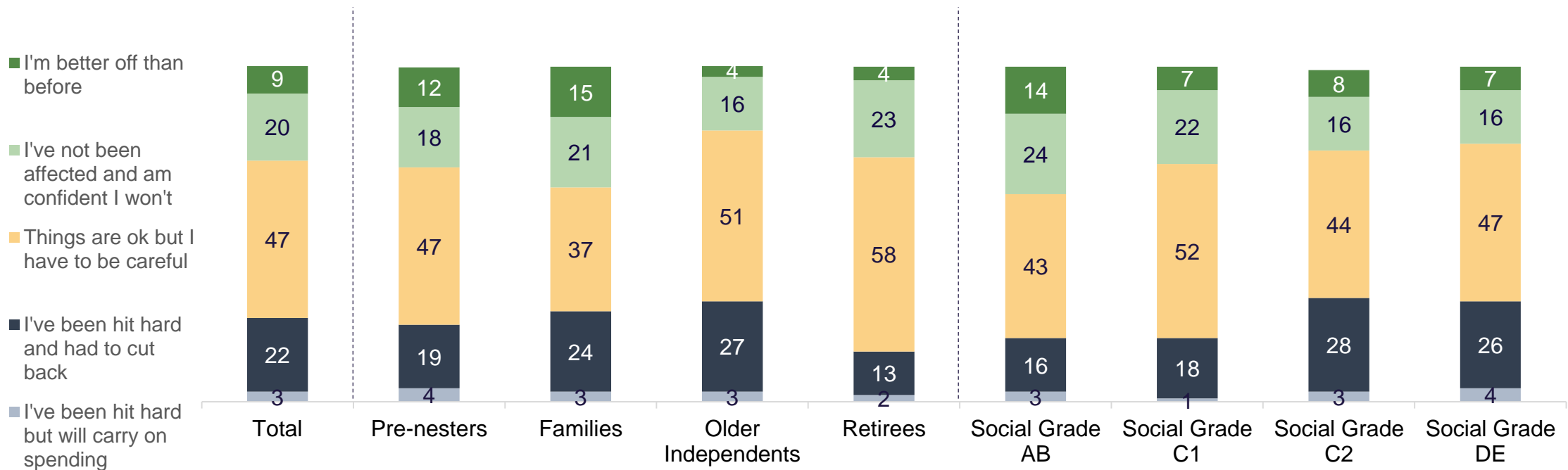
Figure 1. Perception of the situation with regards to the cost of living crisis by life stage, December data, Percentage, UK





# The majority state 'things are ok but I have to be careful' in relation to the cost-of-living crisis. Those in C2/DE social grades and Older Independents are more likely to have been 'hit hard'

Figure 2. Breakdown of residents by financial segments in relation to the cost-of-living crisis, Percentage, December data, UK

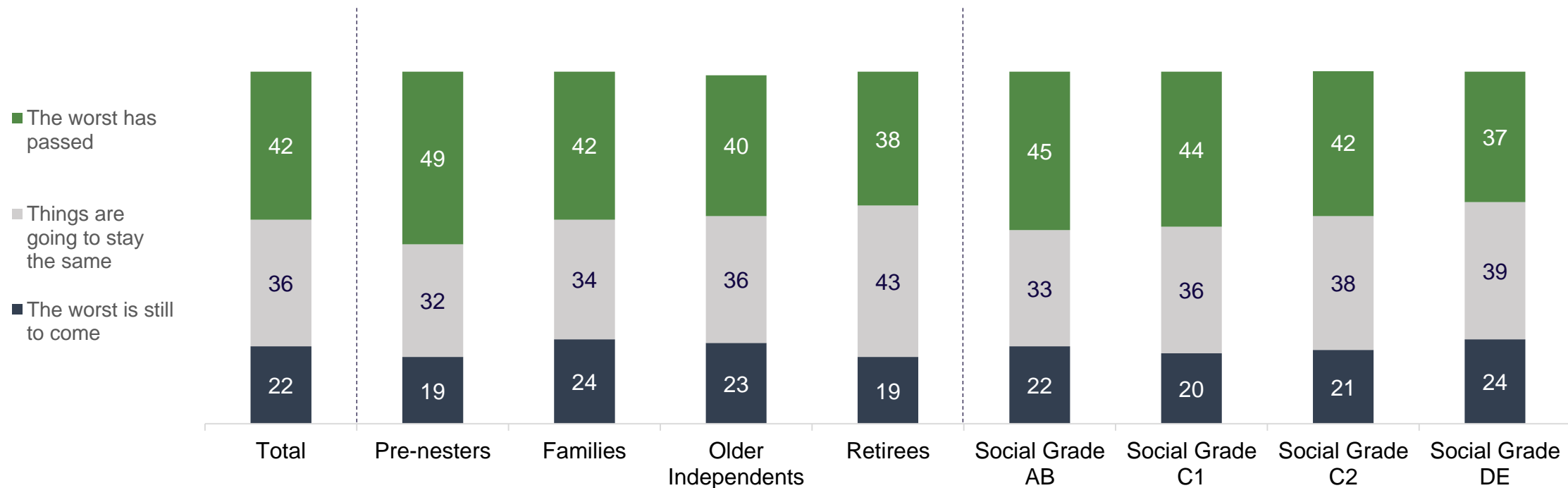


Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?

Base: Total. n=1,760. Pre-Nesters n=328; Families n=595; Older Independents n=495; Retirees n=342; Social Grades AB n=455; C1 n=299; C2 n=370; DE n=636

# Around 1 in 5 perceive the ‘worst is still to come’ in regards to Covid. Pre-Nesters are the most optimistic (49% saying ‘the worst has passed’).

Figure 5. Perception of the situation with regards to COVID-19 by life stage, December data, Percentage, UK

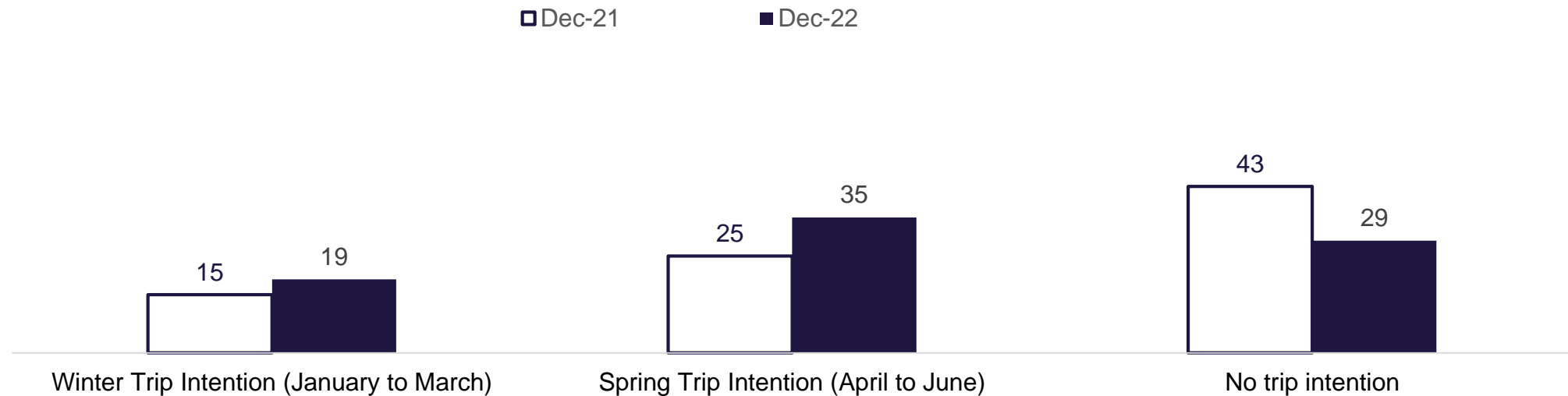


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?  
 Base: Total. n=1,760. Pre-Nesters n=328; Families n=595; Older Independents n=495; Retirees n=342; Social Grades AB n=455; C1 n=299; C2 n=370; DE n=636

## 2. Winter and Spring Intenders Profile

# 1 in 5 plan on taking an overnight trip this Winter (January to March), 1 in 3 this Spring (April to June) – both ahead of intentions in December 2021 when Omicron is likely to have suppressed intentions

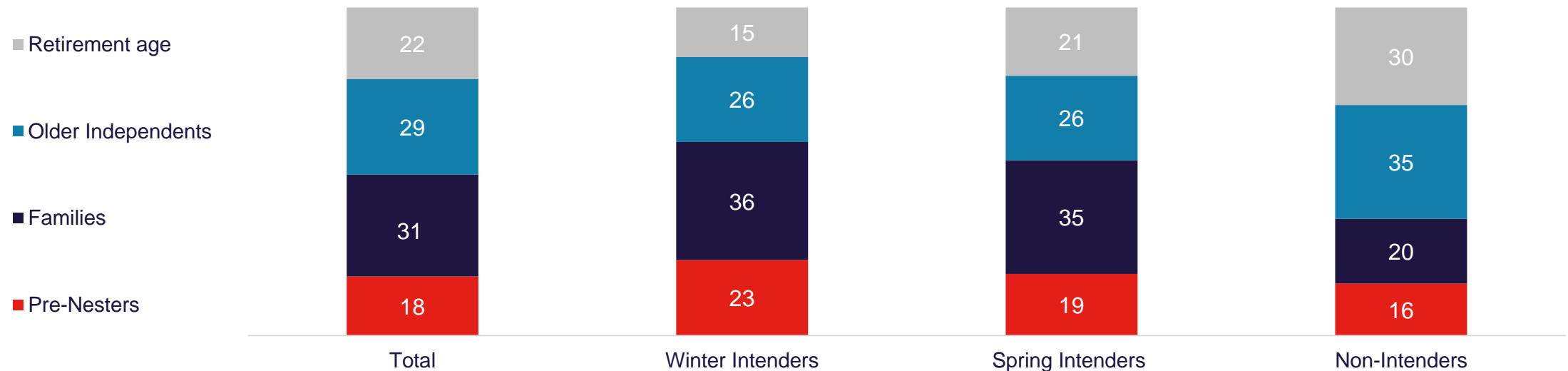
Figure 6. Proportion anticipating going on any overnight UK trips, Percentage, December 2022 data, UK



QVB2a. 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? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. December 2022 = 1,760 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

# Compared to the total sample, there are more Families among Trip intenders. Fewer retirees intend to travel in Winter.

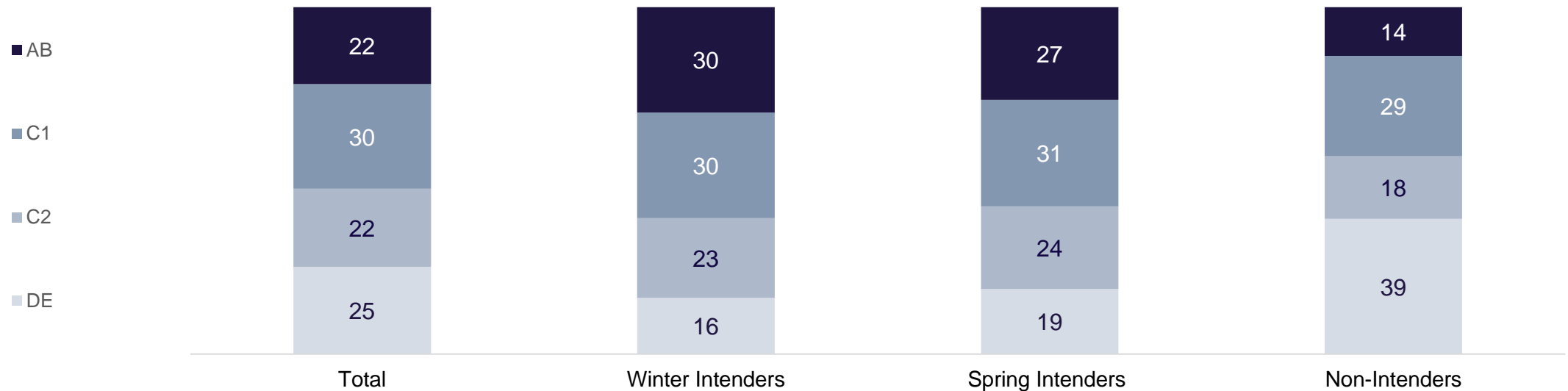
Figure 7. Life stage by UK overnight trip intention, Percentage, October to December data, UK



Source: Demographic questions. Life stage definitions: Pre-Nesters – aged 16-34 without children in household; Families – aged 16-64 with children in household; Older independents – aged 35-64 with no children in household; Retirement age – aged 65+.  
 Base: Total n=5,292; Winter Intenders n=1,129; Spring Intenders n=1,820; Non-Intenders n=1,518

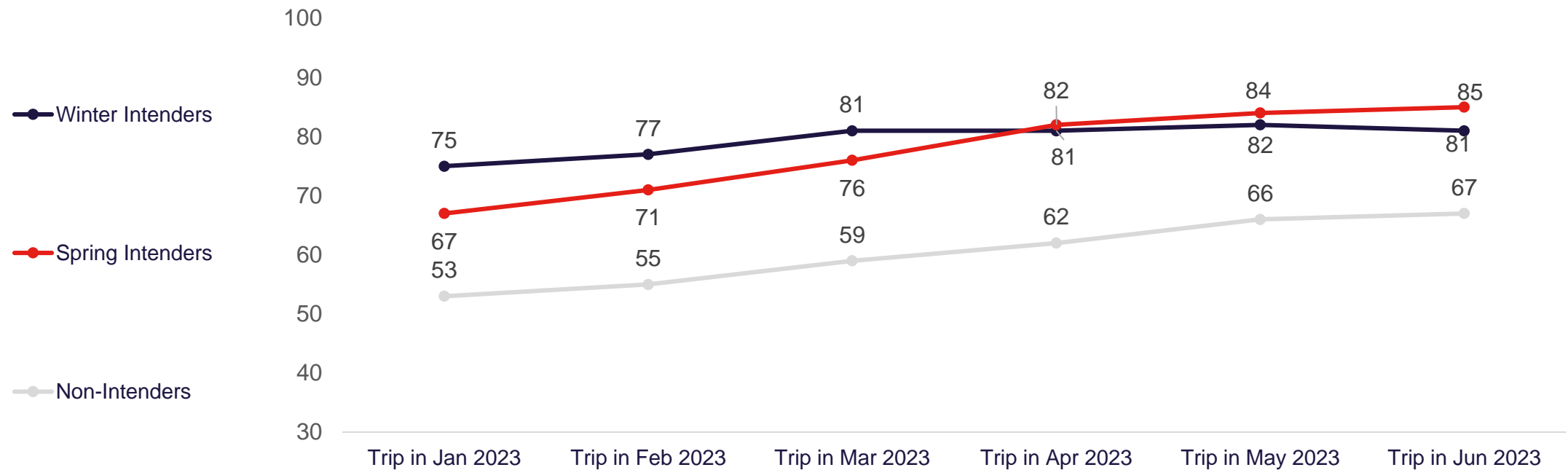
# Both Winter and Spring Intenders are more likely than average to be social grade AB. Non-Intenders are more likely to be social grade DE.

Figure 8. Social grade by UK overnight trip intention, Percentage, October to December data, UK



# Those planning a trip in Winter have a high level of confidence their Winter trip will go ahead. Spring Intenders' confidence picks up for those intending to travel from April onwards.

Figure 10. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, October to December data, UK

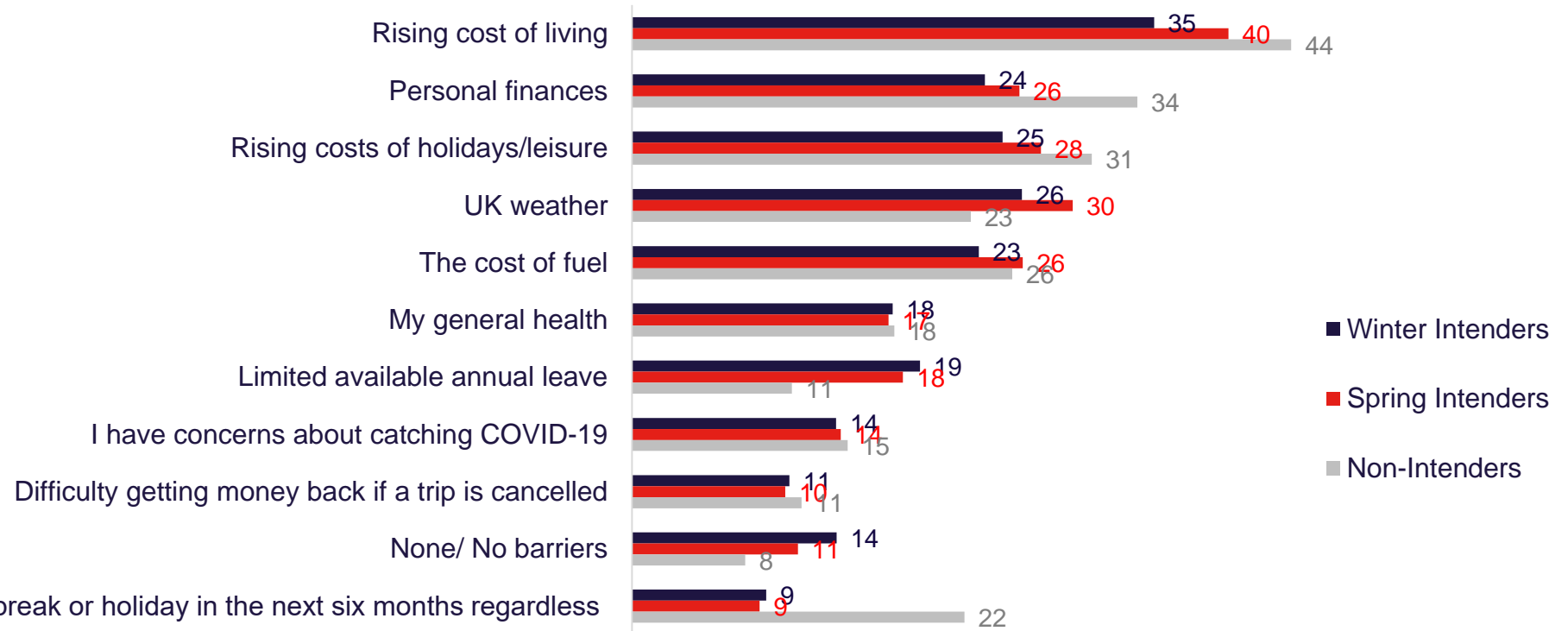


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?

Base: Winter Intenders n=1,129; Spring Intenders n=1,820; Non-Intenders n=1,518

# Those not planning any trips in the near future are more likely than intenders to state 'rising cost of living' and 'personal finances' as potential barriers to taking a trip.

Figure 11. Top 10 Potential barriers for taking an overnight UK trip in next six months, Percentage Top 10, October to December data, UK

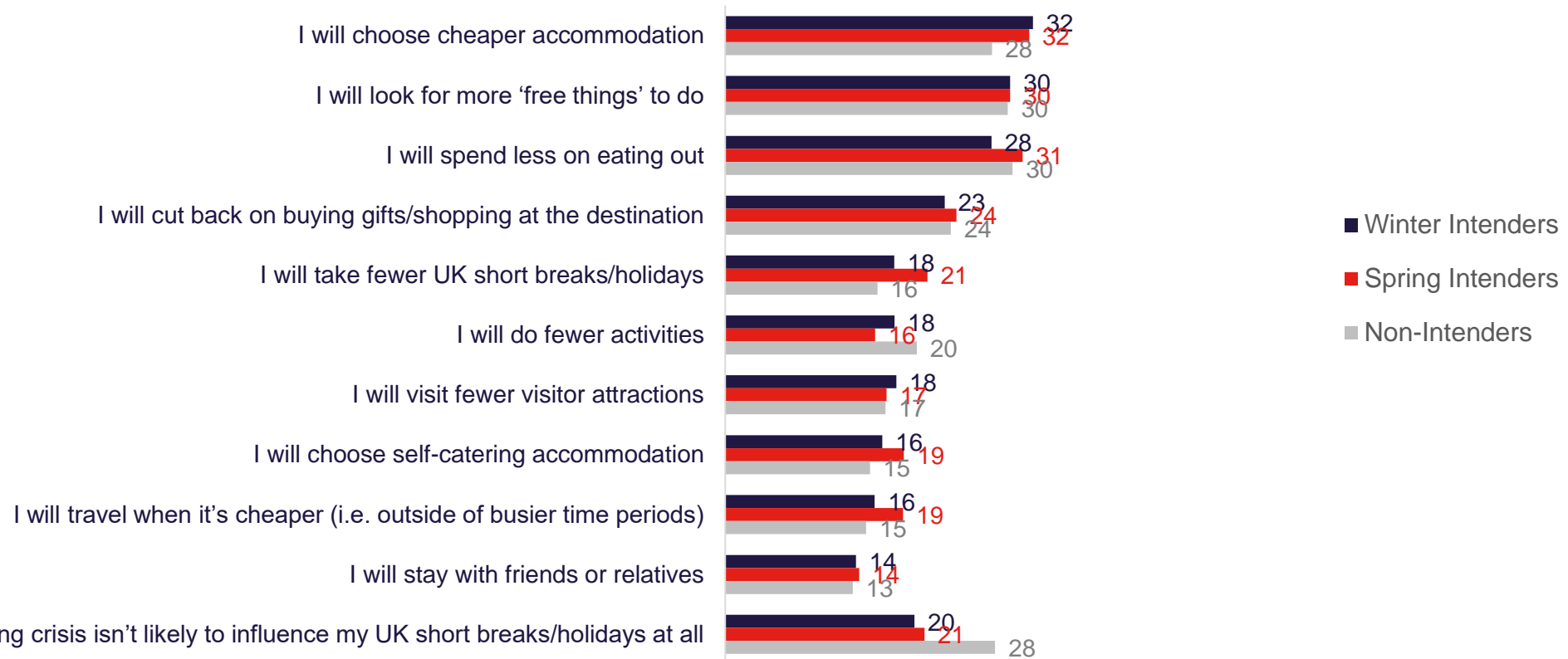


I wouldn't take a UK short break or holiday in the next six months regardless



# The cost of living crisis is most likely to influence Intenders' behaviour through 'choosing cheaper accommodation', 'looking for more free things to do' and 'spending less on eating out'.

Figure 13. 'Cost of living' impact on UK holidays and short breaks, Percentage, October to December data, UK, Top 10



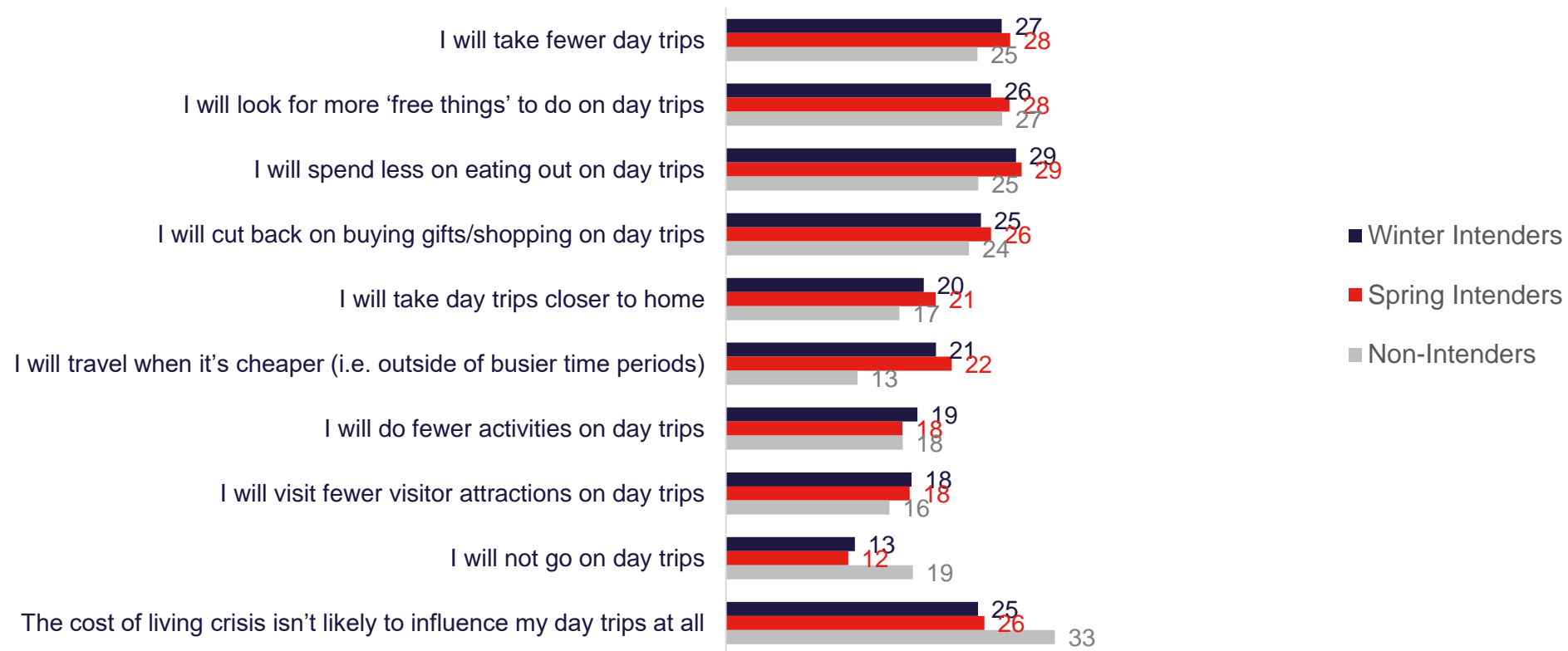
VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?

Base: Winter Intenders n=1,129; Spring Intenders n=1,820; Non-Intenders n=1,518

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

# Focusing on day trips, the ‘cost of living crisis’ is most likely to encourage trip intenders to ‘take fewer day trips’, ‘look for more free things to do’ and ‘spend less on eating out’.

Figure 14. ‘Cost of living’ impact on day trips, Percentage, October to December data, UK, Full list



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: Winter Intenders n=1,129; Spring Intenders n=1,820; Non-Intenders n=1,518

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

# Intenders from both periods share the same top two reasons for going on their next overnight trip – ‘family time or time with my partner’ and ‘to get away from it all and have a rest’.

Figure 15. Motivations for UK holidays and short breaks, Percentage, October to December data, UK, Full list



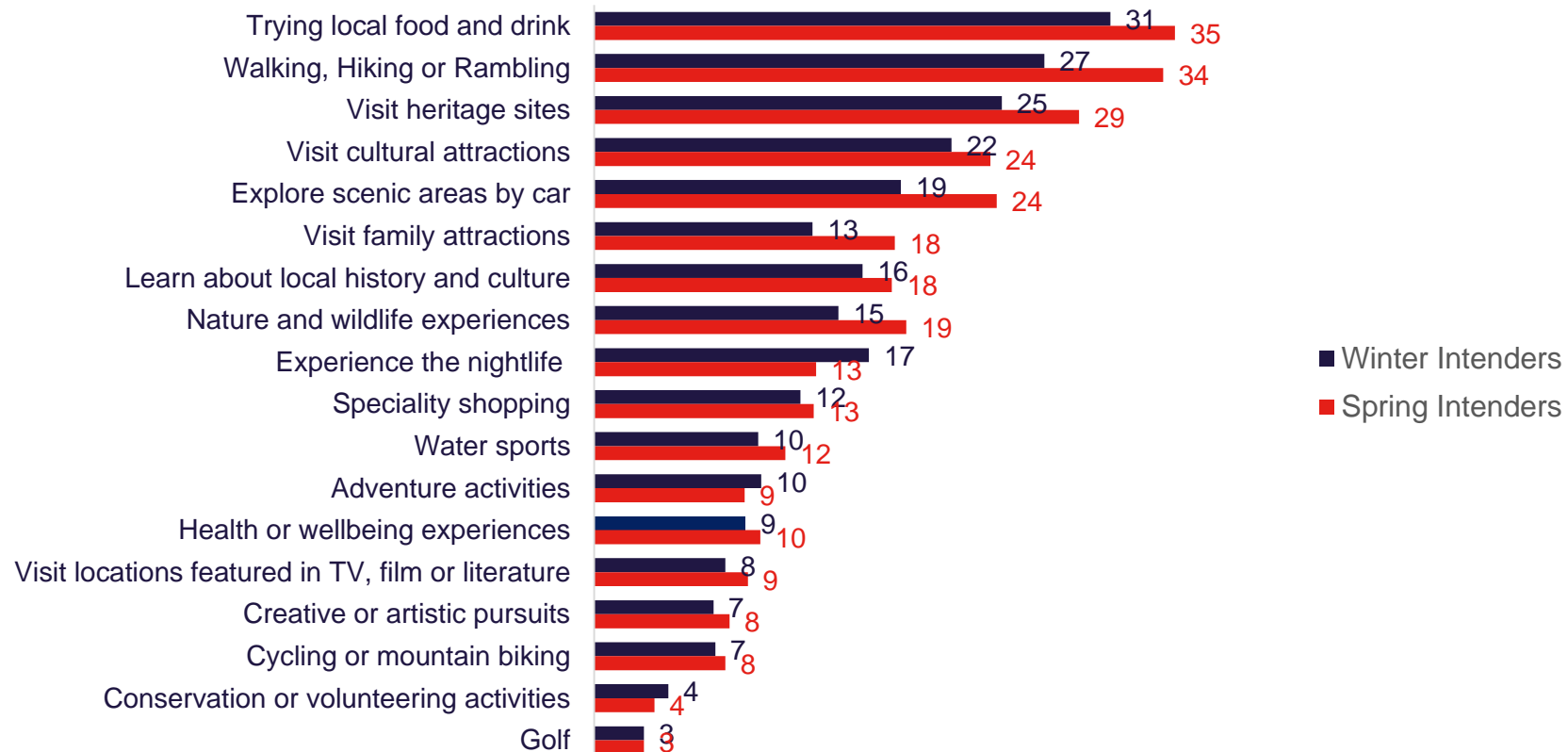
Question: VB6fii. Which of the following best describe your motivation/s for this trip?

Base: Winter Intenders n=1,129; Spring Intenders n=1,820

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

# Spring intenders are more likely to be interested in ‘walking, hiking, rambling’ and exploring ‘scenic areas by car’ and winter intenders might be more likely to ‘experience the nightlife’

Figure 16. Activities for UK holidays and short breaks, Percentage, October to December data, 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: Winter Intenders n=1,129; Spring Intenders n=1,820

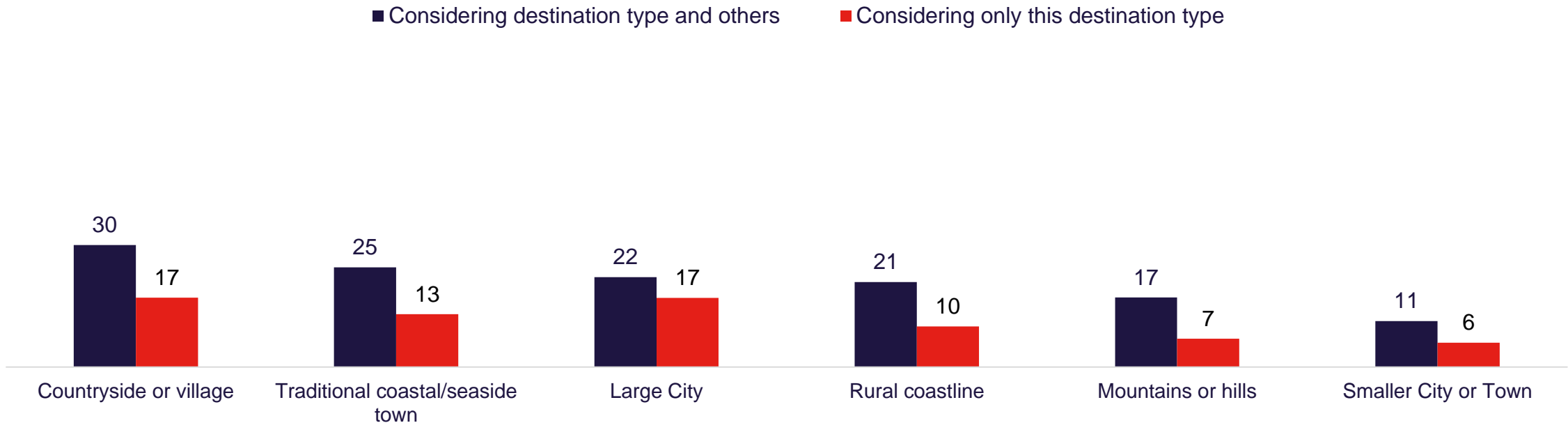
Note: Multiple choice question. Totals may exceed 100%.

## **2. Winter Intenders**

### **Profile by Destination Type**

# Winter Intenders are most likely to plan on taking their next overnight domestic trip in a countryside or village, followed by traditional coastal/seaside town.

Figure 17. Main Destination Type of Intended Winter Trip, Percentage, October to December data, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=876 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

# Some Winter Intenders are considering more than one destination type. For example, 35% of those considering mountains or hills are also considering countryside or village.

Table 1. Destination types also considered for Winter Trips, Percentage, October to December data, UK, (Read chart vertically)

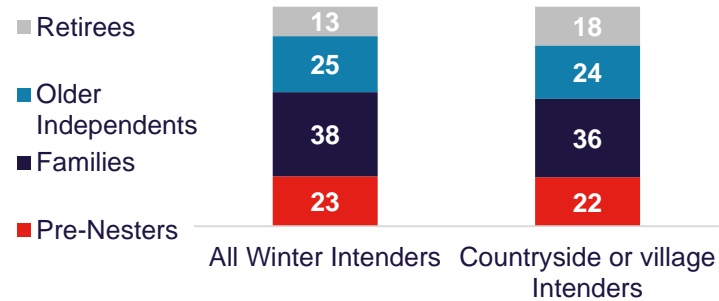
Column %	Traditional coastal/ seaside town	Countryside or village	Rural coastline	Smaller city or town	Large city	Mountains or hills
Traditional coastal/ seaside town		19%	24%	16%	11%	25%
Countryside or village	23%		30%	28%	10%	35%
Rural coastline	21%	21%		21%	9%	25%
Smaller city or town	7%	10%	11%		9%	13%
Large city	10%	7%	10%	17%		6%
Mountains or hills	18%	20%	20%	20%	5%	

QVB5a. Which of the following best describes the main types of destinations you are likely to stay in during your UK trip?  
 Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=876 Note: Multiple choice question.  
 Totals may exceed 100% as some respondents anticipate to go on more than one trip and/or stay in more than one type of destination.

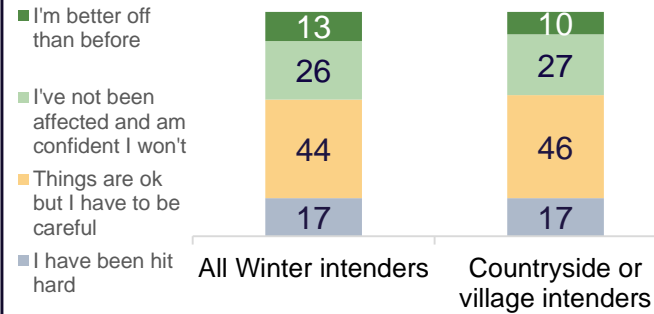
# Winter Countryside or Village Intenders have a similar life stage profile and behaviour to the average. They are more likely than average to travel with partner and other members of family.

## Comparison of those intending to travel to countryside or village in winter to all winter intenders

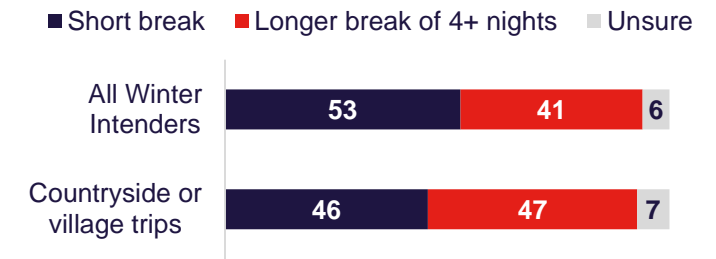
**Figure 18. Life Stage of Winter Intenders, Percentage, October to December data, UK**



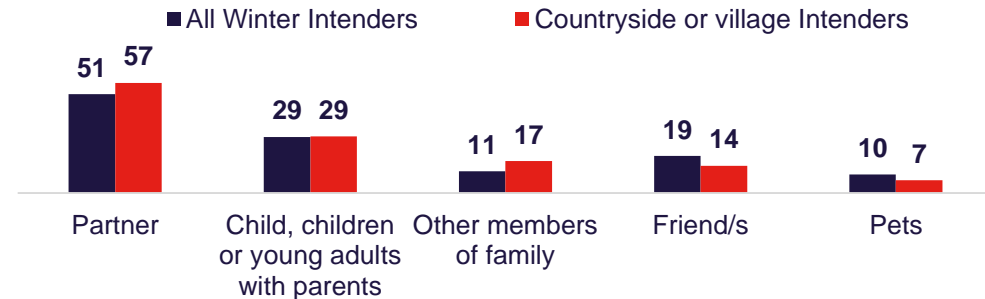
**Figure 19. Finances of Winter Intenders, Percentage, October to December data, UK**



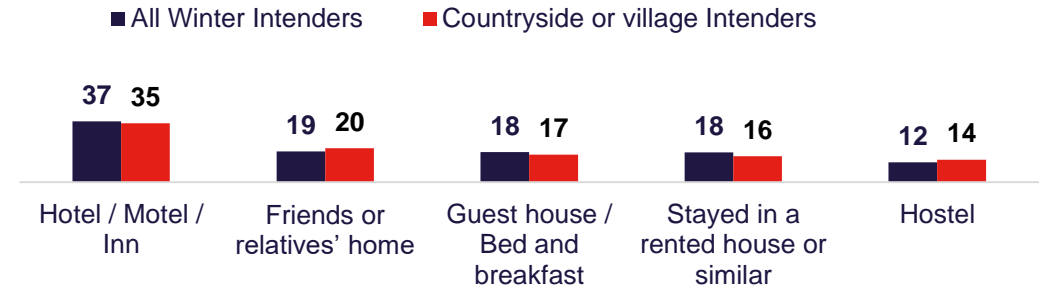
**Figure 20. Trip Duration of Intended Winter Trip, Percentage, October to December data, UK**



**Figure 21. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, October to December data, UK**



**Figure 22. Accommodation Type of Intended Winter Trip, Top 5, Percentage, October to December data, UK**

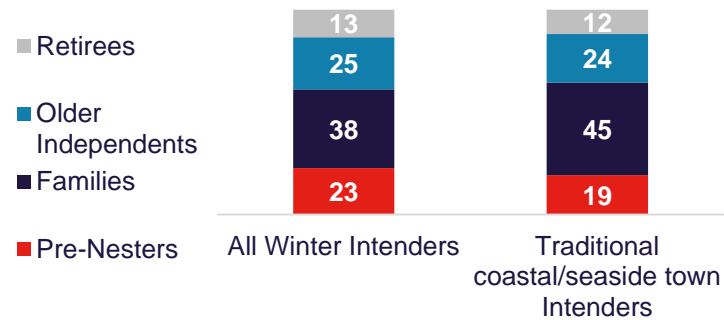




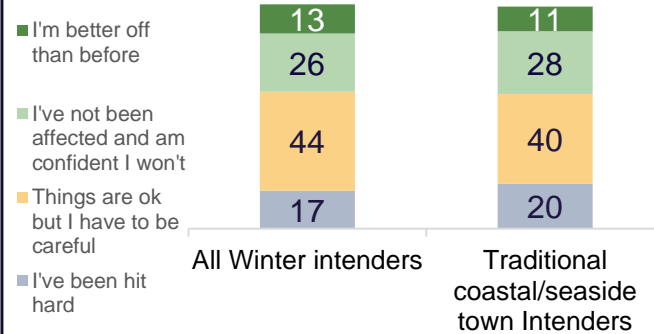
# Winter Traditional coastal/seaside town Intenders are more likely to be of Older Independents life stage compared to average. Behaviour is similar.

## Comparison of those intending to travel to traditional coastal / seaside towns in winter v all winter intenders

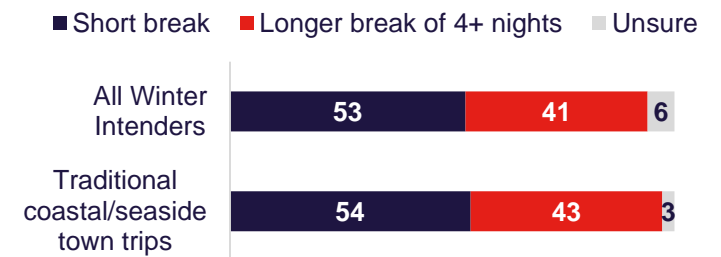
**Figure 23. Life Stage of Winter Intenders, Percentage, October to December data, UK**



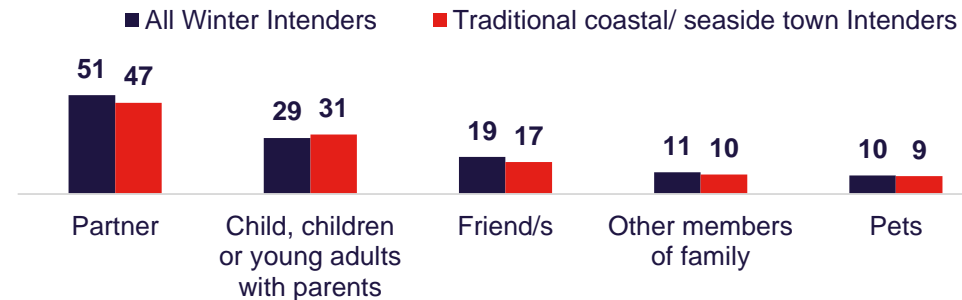
**Figure 24. Finances of Winter Intenders, Percentage, October to December data, UK**



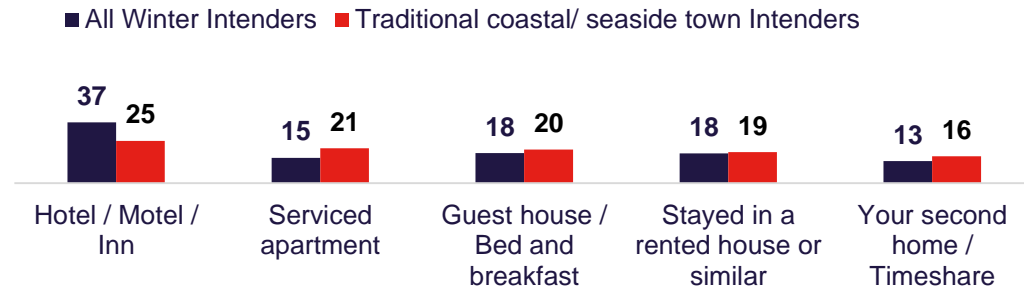
**Figure 25. Trip Duration of Intended Winter Trip, Percentage, October to December data, UK**



**Figure 26. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, October to December data, UK**

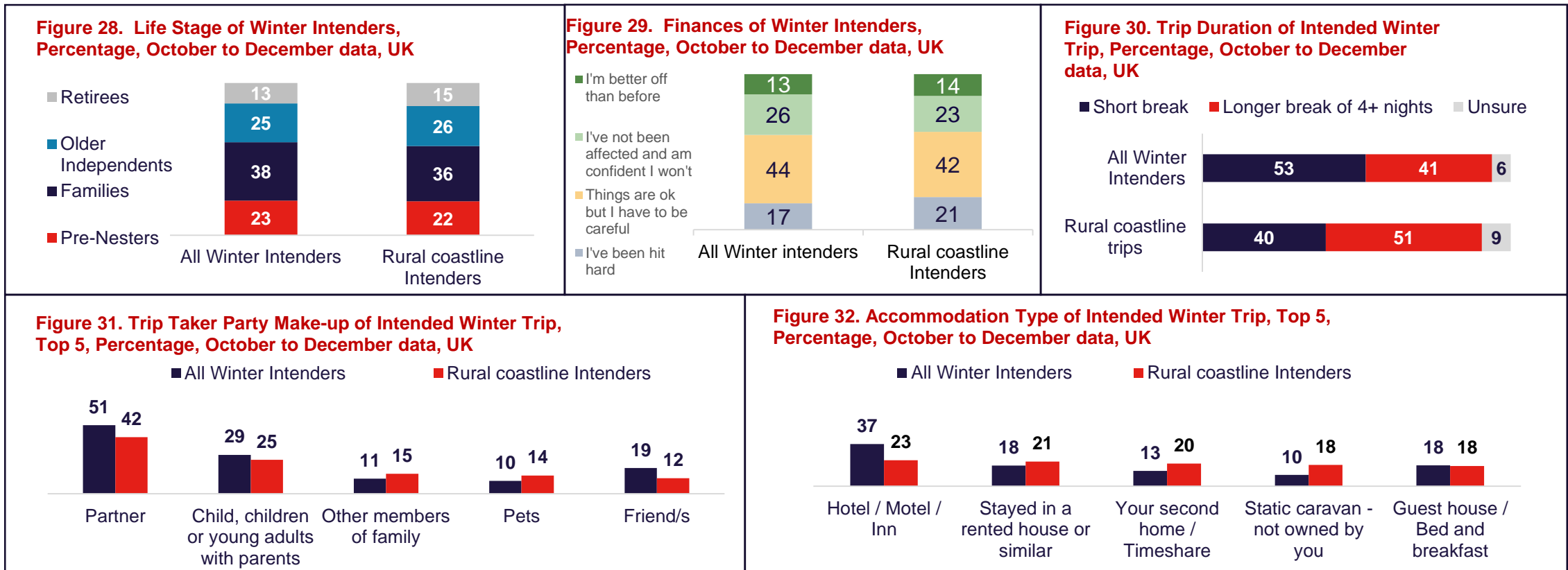


**Figure 27. Accommodation Type of Intended Winter Trip, Top 5, Percentage, October to December data, UK**



# Winter Rural coastline Intenders have a similar life stage profile to average. They are more likely than average to take a longer break, and less likely than average to stay in a Hotel / Motel / Inn.

## Comparison of those intending to travel to the rural coastline in winter to all winter intenders

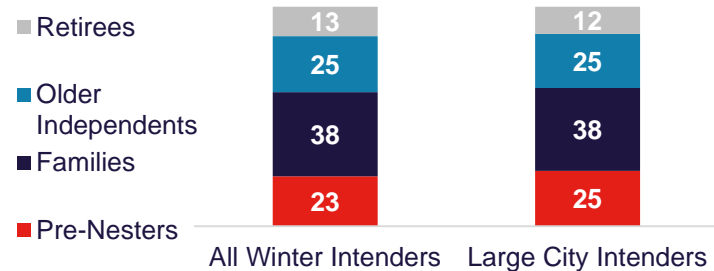


Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=876; Base for life stage and comfort level chart: All Rural Coastline Intenders n=178 ; Base for all other charts: Only Rural coastline Intenders n=80.

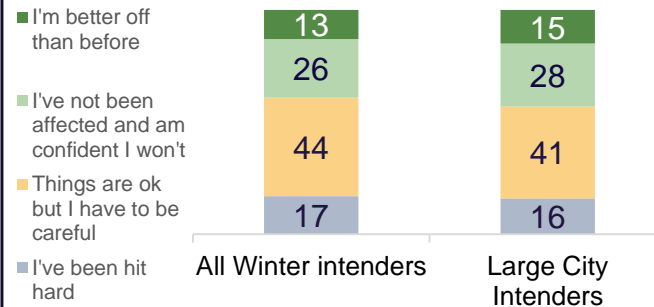
# Winter large city Intenders have a similar life stage profile to average. They are more likely than average to take a short break, take a trip with friend/s, and stay in a Hotel / Motel / Inn.

## Comparison of those intending to travel to a large city in winter to all winter intenders

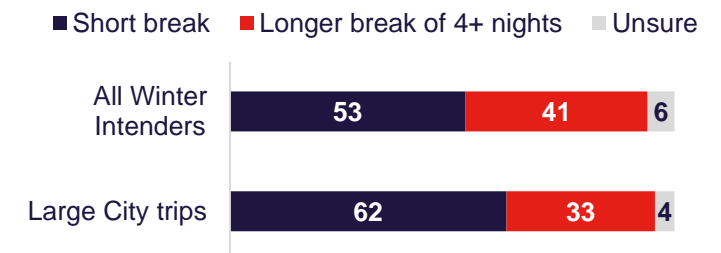
**Figure 33. Life Stage of Winter Intenders, Percentage, October to December data, UK**



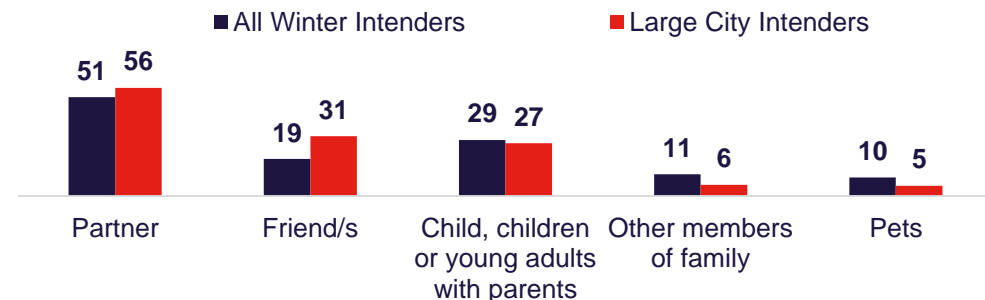
**Figure 34. Finances of Winter Intenders, Percentage, October to December data, UK**



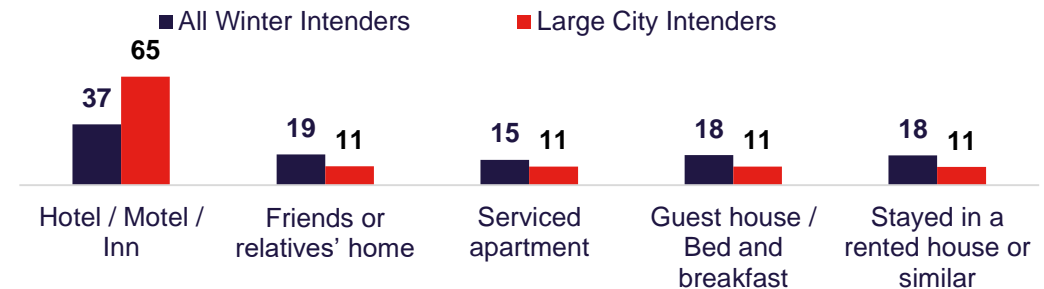
**Figure 35. Trip Duration of Intended Winter Trip, Percentage, October to December data, UK**



**Figure 36. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, October to December data, UK**



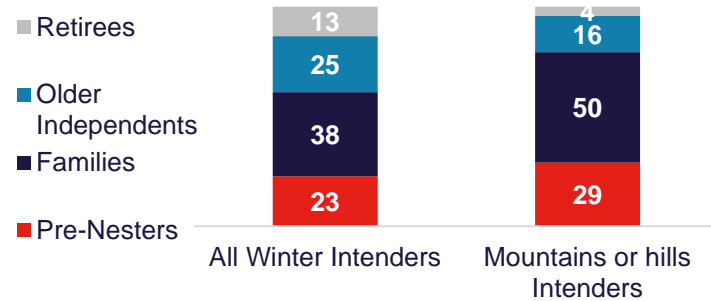
**Figure 37. Accommodation Type of Intended Winter Trip, Top 5, Percentage, October to December data, UK**



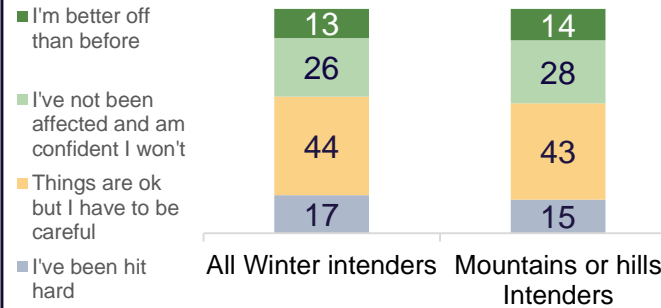
# Winter mountains or hills Intenders are more likely to be of the family life stage than average. They are more likely than average to take a trip with colleagues and stay in a hostel.

## Comparison of those intending to travel to mountains or hills in winter to all winter intenders

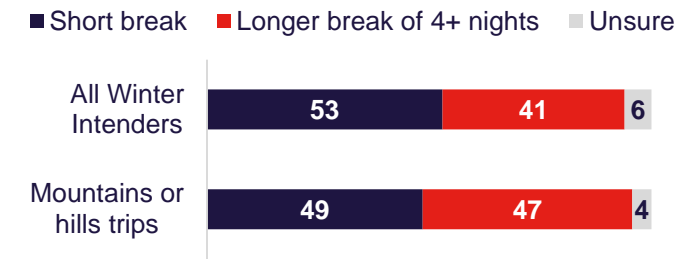
**Figure 38. Life Stage of Winter Intenders, Percentage, October to December data, UK**



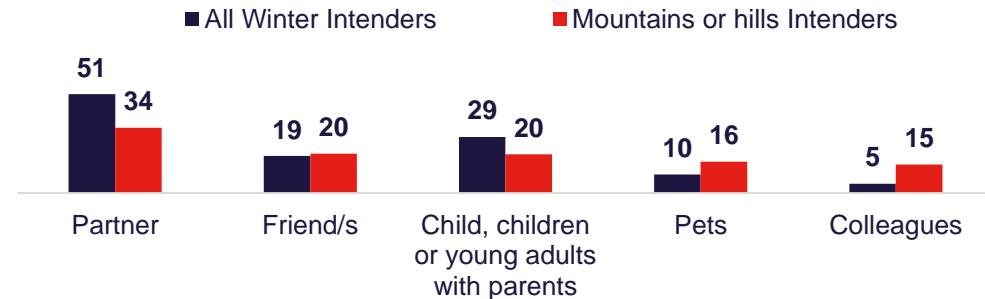
**Figure 39. Finances of Winter Intenders, Percentage, October to December data, UK**



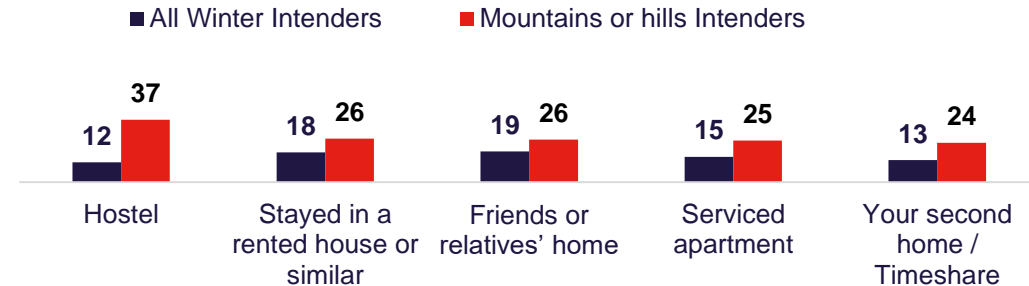
**Figure 40. Trip Duration of Intended Winter Trip, Percentage, October to December data, UK**



**Figure 41. Trip Taker Party Make-up of Intended Winter Trip, Top 5, Percentage, October to December data, UK**

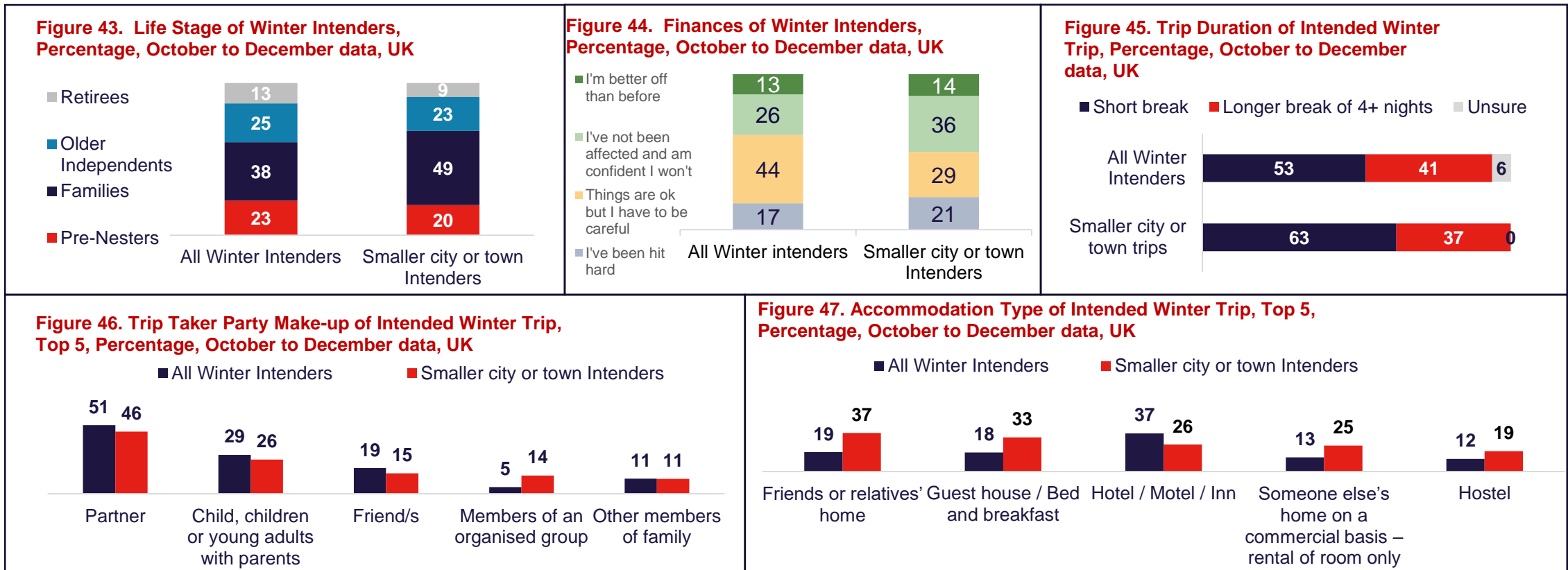


**Figure 42. Accommodation Type of Intended Winter Trip, Top 5, Percentage, October to December data, UK**



# Winter smaller city or town Intenders are more likely to be families. They are more likely to say that they are not affected by the cost of living crisis, take a short break, and stay in friends or relatives' home.

## Comparison of those intending to travel smaller city or towns in winter to all winter intenders



Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=876; Base for life stage and comfort level chart: All Smaller city or town Intenders n=97 ; Base for all other charts: Only Smaller city or town Intenders n=56.

## **3. Winter Intenders**

**Focus on Large City Trips**

# Intention to take an overnight domestic trip in the next 3 months is driven by seasonal factors. However, there is an upward trend, even for cities and large towns.

Figure 48. Incidence of UK overnight trips intended within next 3 months, Percentage wave-on-wave, UK



QVB2a. 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?

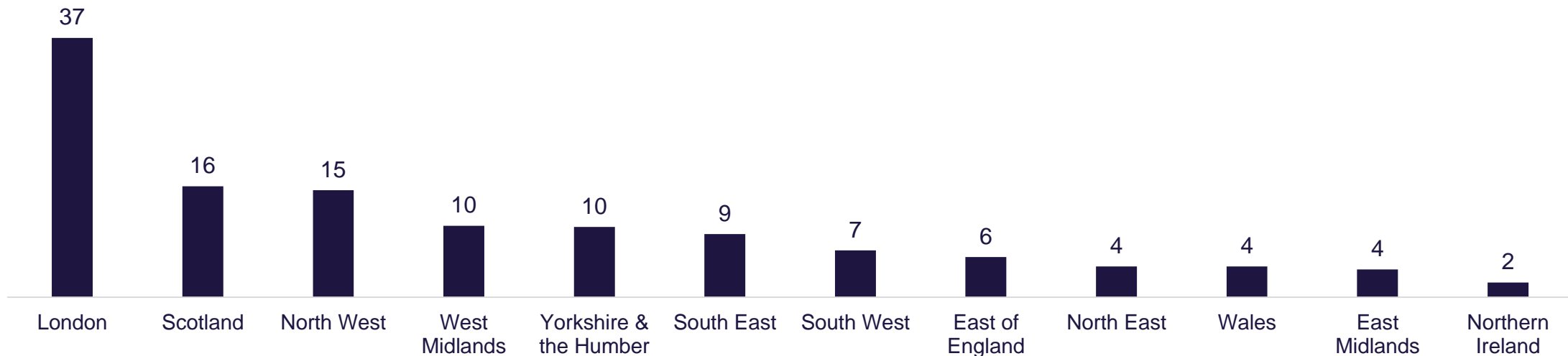
QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?

Base: All respondents n=c,1750 each wave

\*No research was conducted during October 2021

# For Winter large city Intenders, London is by far the leading destination for their trips, followed by Scotland and the North West.

Figure 49. Destination region of next UK overnight trip in a large city for Winter Intenders, Percentage, October to December data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK; Large Winter City Intenders n=216

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.



# Winter large city Intenders and Non-Intenders have similar perceptions – nearly half feel ‘the worst has passed’ for the COVID situation and 3 in 5 the ‘worst is still to come’ for Cost of Living.

Figure 50. Perception of the COVID situation amongst Winter Intenders, Percentage, October to December data, UK

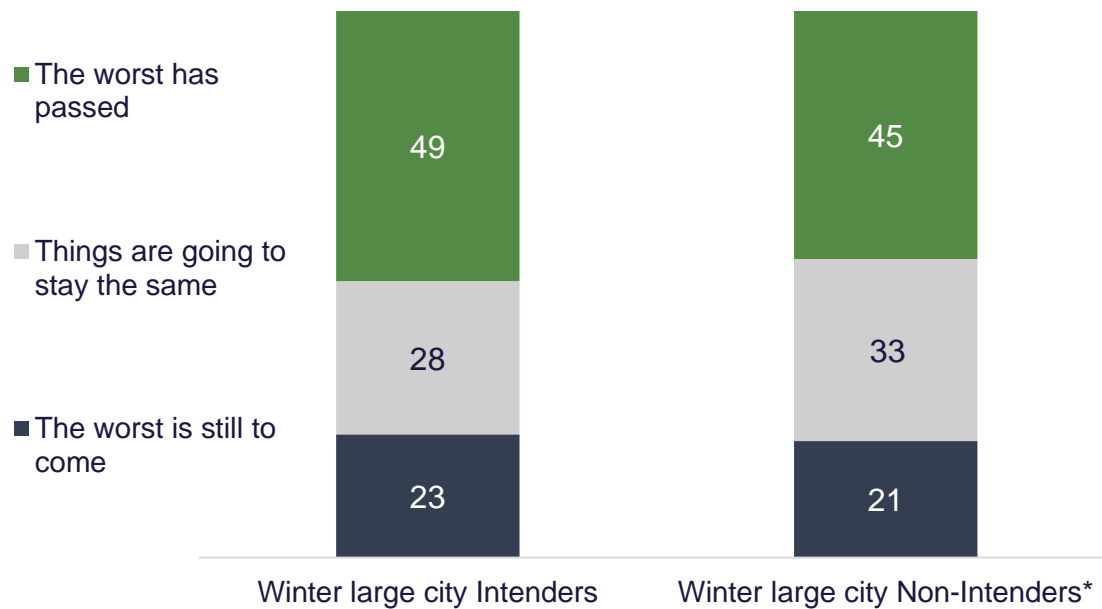
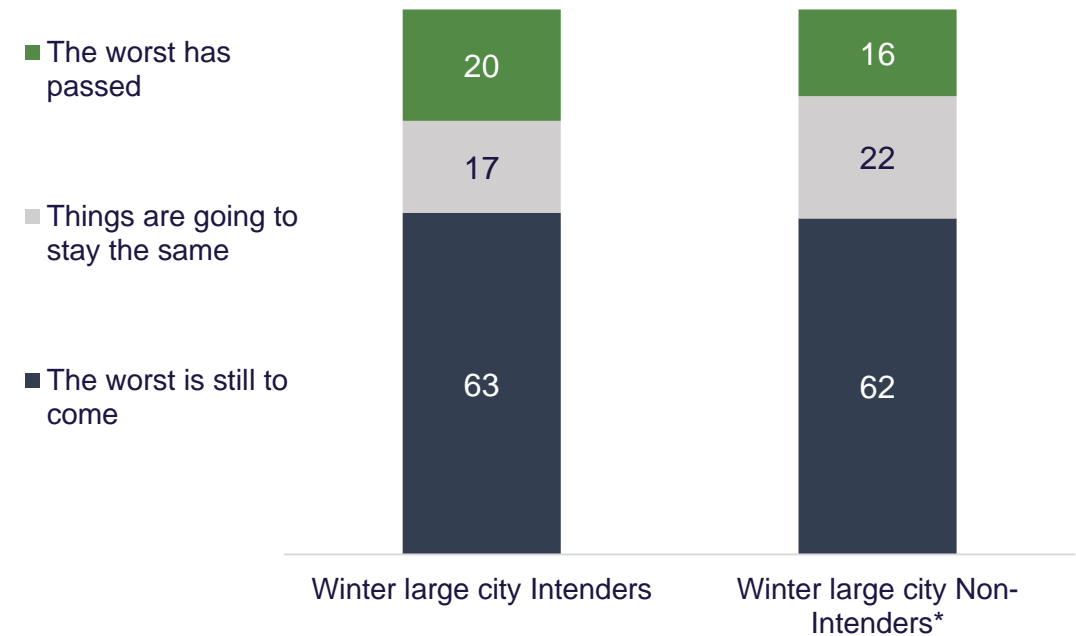
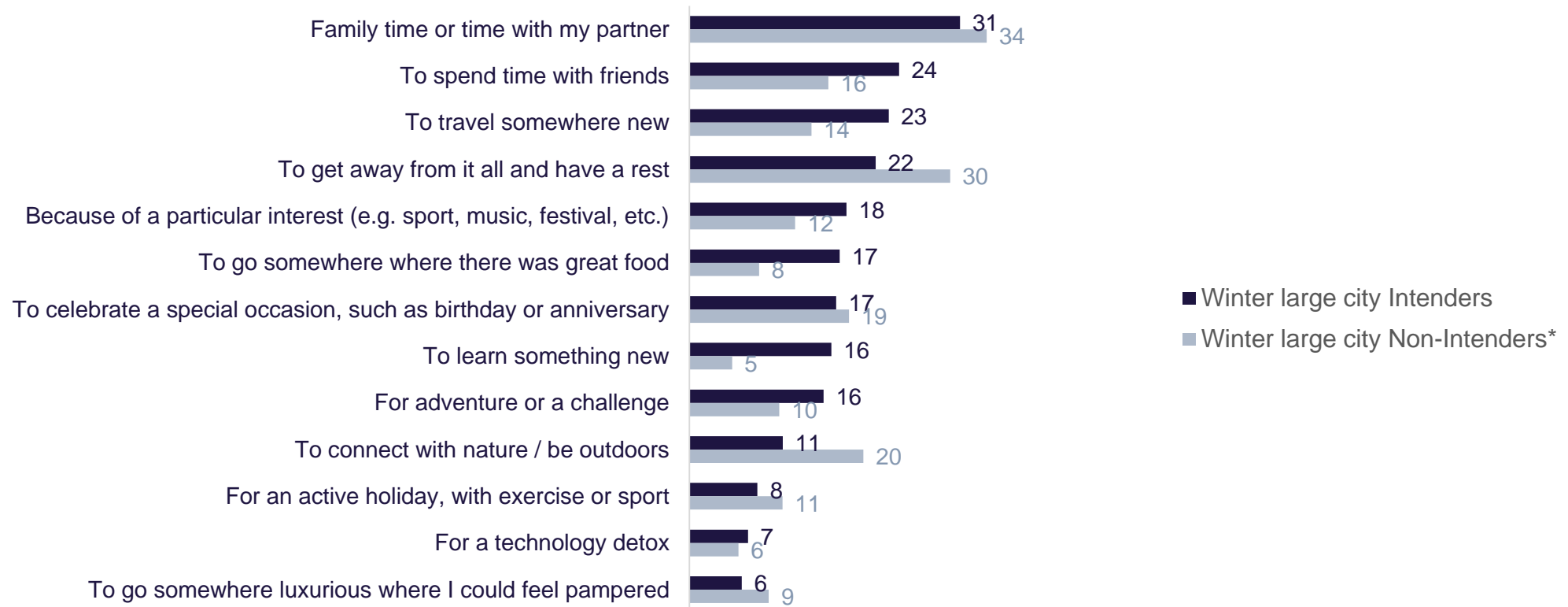


Figure 51. Perception of the Cost of Living crisis amongst Winter Intenders, Percentage, October to December data, UK



# Winter large city Intenders' motivation for the trip is to be 'family time or time with partner' and 'to spend time with friends'; the latter is higher than for Non-Intenders.

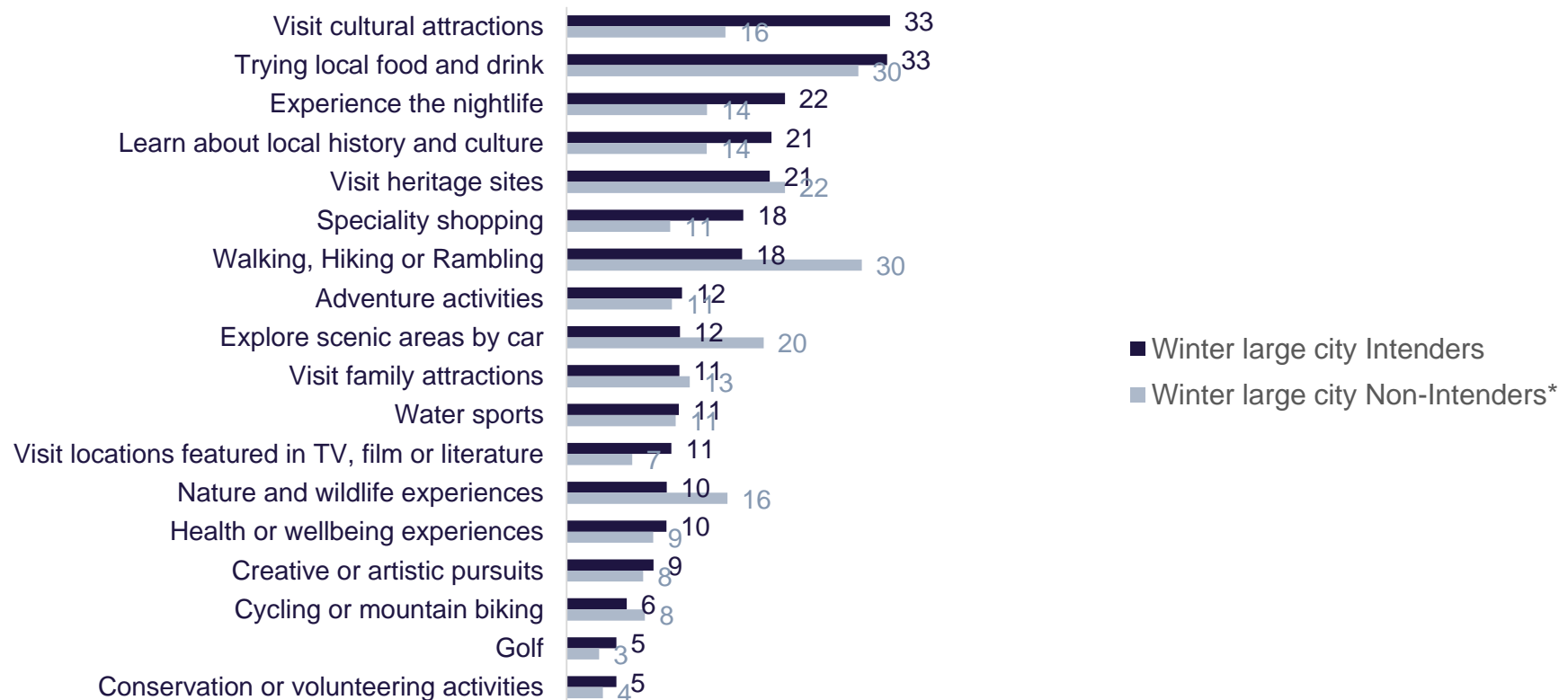
Figure 53. Motivations to take a trip amongst Winter Trip Intenders, Percentage, October to December data, UK



VB6fii. Which of the following best describe your motivation/s for this trip? (\*those winter Intenders not planning on taking an overnight trip to a 'large city' in the Winter period) Base: Large Winter City Intenders n=216; Large Winter City Non-Intenders n=660

# Winter large city Intenders are more likely to seek activities such as ‘visiting cultural attractions’ vs. those intending to go to different destination types in winter.

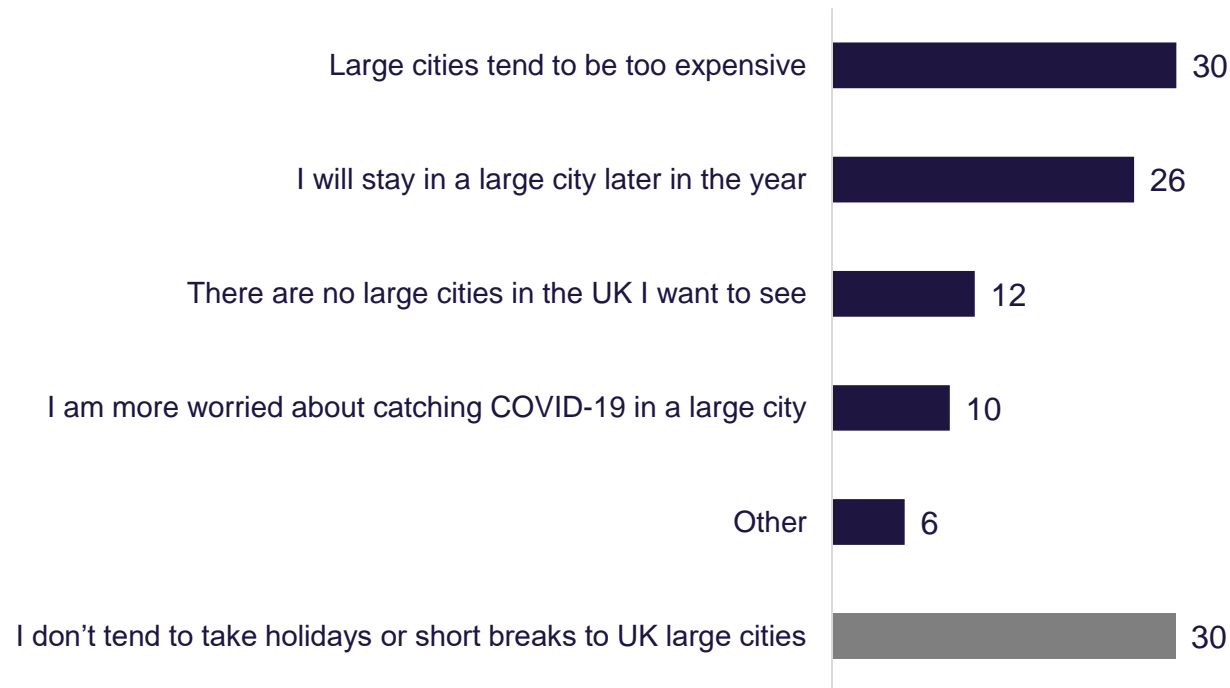
Figure 54. Activities likely to participate in amongst Winter Trip Intenders, Percentage, October to December data, UK



VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in...? (\*those winter Intenders not planning on taking an overnight trip to a 'large city' in the Winter period) Base: Large Winter City Intenders n=216; Large Winter City Non-Intenders n=660

# Those not intending to go to a large city are concerned that 'large cities tend to be too expensive'. 30% 'don't tend to take breaks in UK large cities' at all.

Figure 55. Reasons for not staying in a large city amongst Winter Trip Intenders, Percentage, October to December data, UK



# ‘Large cities tend to be too expensive’ is a top barrier for Pre-Nesters and Families, while Older Independents and Retirees generally don’t tend to choose cities for a holiday or short break.

Tables 2-5. Top 5 Reasons for not taking a trip to a large city in Winter – by life stage, Percentage, October to December data, UK

Pre-Nesters	% of mentions	Families	% of mentions	Older Independents	% of mentions	Retirees	% of mentions
Large cities tend to be too expensive	44%	Large cities tend to be too expensive	38%	I don't tend to take holidays or short breaks to UK large cities	33%	I don't tend to take holidays or short breaks to UK large cities	46%
I will stay in a large city later in the year	27%	I will stay in a large city later in the year	34%	I will stay in a large city later in the year	21%	There are no large cities in the UK I want to see	24%
I don't tend to take holidays or short breaks to UK large cities	26%	I don't tend to take holidays or short breaks to UK large cities	24%	There are no large cities in the UK I want to see	20%	Large cities tend to be too expensive	12%
There are no large cities in the UK I want to see	10%	I am more worried about catching COVID-19 in a large city	13%	Large cities tend to be too expensive	15%	I will stay in a large city later in the year	12%
I am more worried about catching COVID-19 in a large city	8%	There are no large cities in the UK I want to see	4%	I am more worried about catching COVID-19 in a large city	11%	I am more worried about catching COVID-19 in a large city	5%

VB5b. You indicated you don't plan on staying in a large city during your UK trip in <insert month>. Why is this?

Base: All Winter Intenders not confident in taking an overnight UK trip in a large city. Pre-Nesters n=176; Families n=273; Older independents n=133; Retirees n=78

# ‘Free cancellation’ is the most important condition required by both Intender groups. ‘Discounts or special offer deals’ is more important to large city Winter Intenders than to Non-Intenders.

Figure 56. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Required by Winter City Intenders and Non-Intenders, Percentage, October to December data, UK



Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? (\*those winter Intenders not planning on taking an overnight trip to a ‘large city’ in the Winter period) Base: Large Winter City Intenders n=216; Large Winter City Non-Intenders n=660

## **4. Winter Intenders**

### **Profile by Destination Region**

# London is the leading destination for a Winter overnight trip in the UK (17% stating this), marginally ahead of South West at 15% and Yorkshire & the Humber at 12%.

Figure 57. Next UK overnight trip destination region for Winter Intenders, Percentage, October to December data, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK; Winter Intenders n=876

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.



# In Winter, Wales and Scotland are more likely than other regions to attract Pre-Nesters, while many regions in England are more likely to attract Families.

Figure 58. Life stage of Winter Intenders by destination region, Percentage, October to December data, UK



Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n=25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.

# West Midlands is more likely to attract AB social grades, while North East, South East and Wales are more likely to attract C2 social grades.

Figure 59. Social grade of Winter Intenders by destination region, Percentage, October to December data, UK



Social grade question and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n=25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.

# In term of visitor flow from other regions in Winter, West Midlands is more likely to attract those from London (26%) and North East attracts those from South East (26%).

**Table 6. Region of residence of Winter Intenders by destination region, Percentage, October to December data, UK, (Read chart vertically)**

Region of residence [down]	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
England	91%	66%	66%	92%	92%	83%	85%	91%	90%	100%	95%	95%
Scotland	4%	29%	1%	3%	5%	4%	10%	9%	2%	0%	2%	1%
Wales	3%	2%	33%	5%	4%	6%	3%	0%	3%	0%	3%	1%
South West of England	9%	5%	6%	31%	7%	0%	3%	10%	0%	7%	7%	9%
London	18%	12%	2%	12%	27%	14%	18%	7%	26%	17%	8%	6%
South East of England	16%	7%	11%	18%	15%	43%	7%	26%	5%	16%	10%	15%
North West	11%	13%	11%	6%	12%	10%	29%	12%	0%	0%	5%	12%
North East	4%	2%	0%	0%	2%	4%	2%	6%	7%	0%	5%	8%
West Midlands	9%	5%	17%	9%	11%	3%	10%	0%	43%	3%	7%	5%
East Midlands	7%	4%	0%	7%	7%	3%	6%	15%	5%	30%	10%	3%
East of England	8%	2%	4%	4%	7%	1%	6%	6%	0%	19%	31%	12%
Yorkshire & Humber	9%	15%	15%	4%	4%	5%	3%	9%	5%	8%	13%	25%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.

# Destination type reflects the destination region being considered. London Intenders are likely to visit a large city while East Midlands Intenders are likely to visit countryside or village.

**Table 7. Destination type of Winter trip by destination region, Percentage, October to December data, UK**

Destination type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Traditional coastal/seaside town	23%	9%	22%	34%	10%	27%	17%	33%	13%	4%	37%	19%
Countryside or village	29%	37%	32%	39%	14%	28%	36%	10%	17%	63%	33%	24%
A city or large town	32%	36%	22%	10%	61%	24%	29%	24%	40%	11%	31%	31%
Rural coastline	21%	25%	18%	37%	13%	11%	12%	27%	14%	18%	20%	18%
Mountains or hills	16%	27%	21%	8%	8%	6%	19%	14%	29%	19%	8%	20%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.

# There are some differences by destination region in terms of who the Winter Intenders plan to travel with, although partner is most common option for most regions.

**Table 8. Trip taker party composition of Winter trip by destination region, Percentage, October to December data, UK**

Trip taker party composition	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Partner	47%	70%	68%	63%	51%	40%	42%	23%	31%	67%	41%	56%
Children or young adults (aged 16-24)	30%	26%	28%	21%	30%	31%	25%	29%	22%	39%	44%	29%
Friend/s	21%	18%	10%	21%	20%	25%	27%	17%	19%	7%	34%	9%
Other members of my family	12%	1%	15%	8%	10%	15%	16%	22%	15%	9%	8%	6%
Pets	11%	7%	3%	10%	3%	16%	6%	3%	30%	17%	12%	14%
With parents of older adults	6%	1%	7%	3%	4%	9%	10%	11%	13%	0%	5%	5%
Will travel alone	3%	8%	8%	2%	5%	5%	5%	13%	5%	0%	1%	3%
Other	11%	4%	3%	2%	3%	9%	9%	3%	9%	13%	11%	21%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.

# Hotel/motel/inn is the top accommodation type for Winter Intenders across most regions, although there is some variation.

Table 9. Accommodation type of Winter trip by destination region, Percentage, October to December data, UK, Top 9 ranked by all Winter Intenders

Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Hotel / Motel / Inn	33%	48%	44%	41%	57%	31%	43%	30%	22%	34%	10%	23%
Friends or relatives' home	21%	14%	16%	17%	17%	22%	16%	35%	27%	23%	20%	14%
Guest house / B&B	19%	20%	9%	18%	15%	17%	13%	13%	26%	18%	15%	17%
Stayed in a rented house or similar	19%	13%	9%	17%	8%	22%	19%	14%	13%	11%	12%	23%
In someone else's home on a commercial basis – rental of room only	16%	3%	15%	10%	12%	16%	11%	15%	24%	23%	18%	13%
Serviced apartment	17%	6%	2%	7%	11%	17%	20%	15%	19%	7%	27%	15%
Your second home / Timeshare	16%	7%	4%	6%	14%	18%	11%	14%	17%	17%	12%	12%
Hostel	14%	9%	3%	6%	7%	20%	11%	9%	23%	0%	9%	22%
Static caravan - not owned by you	11%	2%	8%	15%	1%	6%	4%	10%	16%	7%	38%	8%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.

# Less common accommodation choices among Winter Intenders are caravan/camping/glamping.

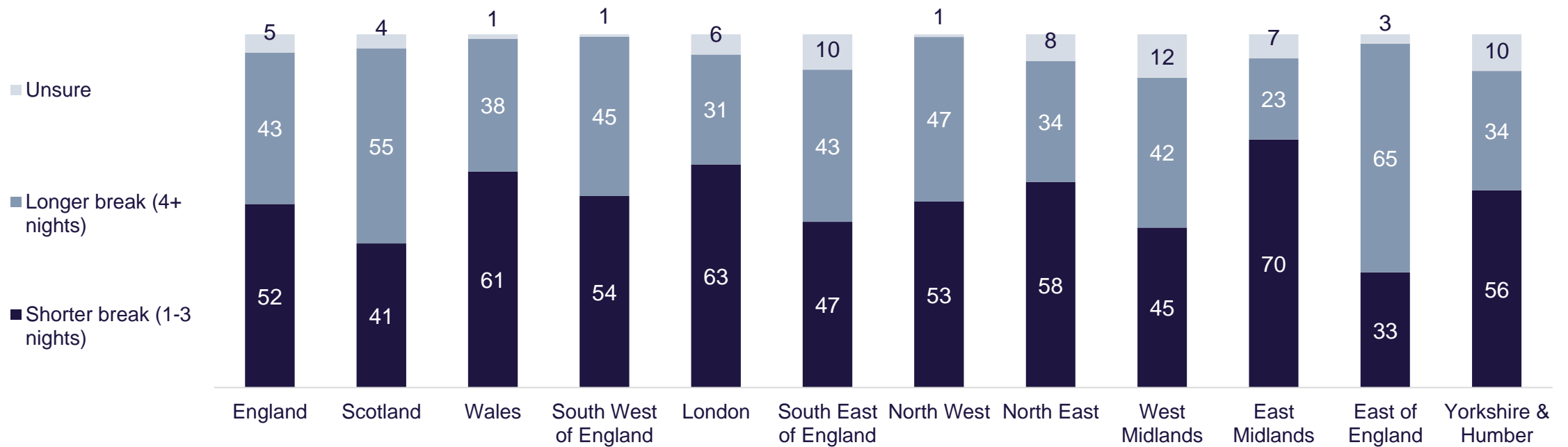
**Table 10. Accommodation type of Winter trip by destination region, Percentage, October to December data, UK, Bottom 8 ranked by all Winter Intenders**

Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Campervan / Motorhome	12%	5%	13%	5%	8%	12%	7%	9%	8%	11%	13%	16%
Staying in a rented flat/apartment or similar	8%	20%	4%	7%	5%	5%	6%	14%	17%	2%	7%	7%
Static caravan - owned by you	10%	4%	2%	3%	3%	9%	8%	12%	19%	3%	6%	11%
In someone else's home on a commercial basis – rental of full property	7%	10%	4%	10%	8%	1%	1%	0%	7%	4%	8%	5%
Touring caravan	7%	7%	0%	4%	7%	3%	5%	0%	16%	3%	7%	7%
Tent	5%	2%	9%	1%	5%	11%	3%	3%	4%	10%	0%	7%
Farmhouse	4%	4%	7%	5%	1%	3%	10%	2%	4%	4%	0%	3%
Glamping / Alternative accommodation	4%	7%	0%	2%	2%	4%	0%	2%	3%	0%	12%	4%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.

# East of England is the most likely region to be chosen for longer breaks in winter, while East Midlands, London and Wales are intended for shorter breaks.

Figure 60. Duration of Winter trip by destination region, Percentage, October to December data, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n=25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63 \*Small base size treat with caution.



# Scotland, South West and Wales are most likely chosen for ‘family time or time with my partner’. ‘To get away from it all and have a rest’ is the most likely motivation among those intending to go to Yorkshire & Humber.

**Table 11. Motivations to take a trip for Winter trip by destination region, Percentage, October to December data, UK, Top 7 ranked by all Winter Intenders**

Motivations	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Family time or time with my partner	29%	48%	43%	44%	30%	27%	28%	14%	26%	42%	23%	31%
To get away from it all and have a rest	26%	32%	21%	28%	27%	13%	30%	23%	24%	16%	32%	39%
To spend time with friends	19%	18%	19%	18%	17%	26%	16%	33%	17%	18%	24%	17%
To connect with nature / be outdoors	17%	22%	30%	18%	7%	15%	13%	8%	18%	42%	14%	23%
To celebrate a special occasion	18%	18%	15%	13%	14%	14%	21%	11%	28%	41%	7%	24%
Because of a particular interest	17%	6%	8%	13%	19%	17%	16%	21%	22%	35%	16%	13%
To travel somewhere new	12%	23%	23%	10%	12%	14%	8%	3%	14%	19%	3%	13%

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

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.

# Less common motivations for Winter Intenders to go on a trip are 'to go somewhere luxurious', 'to learn something new' and 'for a technology detox'.

**Table 12. Motivations to take a trip for Winter trip by destination region, Percentage, October to December data, UK, Bottom 7 ranked by all Winter Intenders**

Motivations	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
For adventure or a challenge	10%	14%	13%	8%	7%	6%	9%	7%	10%	4%	22%	15%
For an active holiday	10%	17%	15%	5%	5%	4%	8%	26%	10%	0%	14%	9%
To go somewhere where there was great food	11%	7%	2%	5%	18%	13%	6%	6%	10%	21%	6%	6%
To go somewhere luxurious	9%	5%	3%	7%	5%	7%	9%	5%	19%	12%	2%	13%
To learn something new	8%	4%	7%	1%	16%	9%	1%	7%	8%	7%	4%	13%
For a technology detox	7%	7%	7%	5%	2%	3%	6%	13%	12%	0%	10%	4%
Other	3%	2%	0%	2%	3%	7%	7%	0%	0%	11%	1%	6%

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

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.

# While ‘trying local food and drink’ is most common activity overall, only 8% of East of England Winter Intenders plan to take part in this activity.

**Table 13. Activities likely to participate in for Winter trip by destination region, Percentage, October to December data, UK, Top 10 ranked by all Winter Intenders**

Activities	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Trying local food and drink	24%	47%	39%	31%	22%	22%	28%	11%	18%	33%	8%	43%
Walking, Hiking or Rambling	24%	36%	44%	40%	12%	26%	27%	19%	22%	27%	21%	26%
Visit heritage sites	16%	41%	42%	30%	10%	5%	5%	25%	19%	28%	13%	21%
Explore scenic areas by car	16%	25%	25%	24%	7%	6%	11%	7%	31%	34%	18%	27%
Visit cultural attractions	17%	16%	31%	18%	24%	13%	19%	9%	8%	30%	3%	12%
Experience the nightlife	16%	15%	12%	16%	20%	12%	23%	14%	12%	7%	14%	21%
Learn about local history and culture	12%	24%	17%	17%	13%	8%	1%	14%	20%	19%	3%	21%
Nature and wildlife experiences	14%	21%	8%	24%	9%	3%	9%	11%	17%	9%	9%	24%
Water sports	12%	9%	12%	9%	8%	9%	5%	32%	27%	3%	15%	10%
Adventure activities	11%	13%	16%	11%	9%	15%	10%	20%	10%	4%	7%	8%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.

# ‘Visiting family attractions’ is mainly intended by those planning a trip to the East of England.

**Table 14. Activities likely to participate in for Winter trip by destination region, Percentage, October to December data, UK**

Activities	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Visit family attractions	12%	5%	12%	13%	8%	16%	9%	16%	6%	4%	23%	5%
Speciality shopping	12%	6%	15%	23%	15%	14%	8%	6%	13%	7%	1%	6%
Health or wellbeing experiences	9%	6%	7%	7%	5%	10%	11%	7%	10%	19%	6%	7%
Visit locations featured in TV, film or literature	8%	8%	3%	5%	10%	3%	7%	6%	13%	7%	12%	6%
Creative or artistic pursuits	9%	7%	12%	11%	6%	1%	10%	0%	10%	13%	0%	6%
Cycling or mountain biking	7%	13%	6%	5%	9%	1%	5%	9%	13%	0%	12%	3%
Golf	4%	6%	4%	5%	1%	6%	5%	3%	2%	3%	3%	1%
Conservation or volunteering activities	5%	1%	4%	0%	4%	2%	0%	3%	13%	4%	5%	2%
None of these	5%	2%	1%	9%	6%	7%	7%	0%	7%	0%	7%	4%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?

Base: All respondents planning on taking a holiday or short break in the UK in Winter England n=593; Scotland n=80; Wales n=54; South West of England n=82; London n=97; South East of England n=55; North West n=64; North East n =25\* West Midlands = 43\*, East Midlands = 17\*, East of England n=48\*, Yorkshire = 63

\*Small base size treat with caution.



# Methodology Notes

# Methodology outline

- The findings in this report are based on an online survey conducted amongst 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' in Wales and 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.

# Master Data Table

- 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.