Domestic Sentiment Tracker: August 2023

Published: 21st August 2023
Fieldwork Period: 1st to 7th August 2023

UK Results
Contents

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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, 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 to 7th August 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
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.

- **August to September 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between August to September 2023
- **October to December 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between October to December 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+
## August 2023: Scorecard of Key Metrics

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>August 2023</th>
<th>Change since July 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>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Proportion intending a UK overnight trip at any point in the next 12 months</td>
<td>74%</td>
<td>-1%</td>
</tr>
<tr>
<td>Proportion intending an overseas overnight trip at any point in the next 12 months</td>
<td>56%</td>
<td>0%</td>
</tr>
<tr>
<td>Preference for UK over overseas in the next 12 months (vs past 12 months)</td>
<td>38%</td>
<td>+2%</td>
</tr>
<tr>
<td>Took a domestic overnight trip in the past 12 months (August 2022 –July 2023)</td>
<td>61%</td>
<td>-1%</td>
</tr>
<tr>
<td>Net proportion of UK trips in the next 12 months vs the last 12 months [% ‘more’ minus % ‘fewer’ trips]</td>
<td>6%</td>
<td>+3%*</td>
</tr>
<tr>
<td>Net proportion of overseas trips in the next 12 months vs the last 12 months [% ‘more’ minus % ‘fewer’ trips]</td>
<td>-20%</td>
<td>0%</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>31%</td>
<td>-2%</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>1st Rising cost of living; 2nd UK weather 3rd Personal Finances</td>
<td>No differences</td>
</tr>
</tbody>
</table>

* Represents a statistically significant change on previous wave
N/A – due to new question wording meaning comparison to last wave cannot be done
1. Current General Sentiment
Half of respondents think ‘the worst is still to come’ in relation to the cost-of-living crisis, consistent with recent months.

Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK

- The worst is still to come
- Things are going to stay the same
- The worst has passed

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. August 2023 = 1,761
Due to the cost-of-living crisis, most of UK adults (67%) are either ‘cautious and being very careful’ (45%) or have been ‘hit hard and are cutting back’ (22%)

Figure 2. Feelings about situation during the ‘cost of living crisis’, Percentage, UK

- I’m one of the lucky ones – better off than before the crisis
- I’m alright – the ‘cost of living crisis’ has not really affected me and confident it won’t
- I’m cautious - things are OK but I feel I have to be very careful
- I’ve been hit hard – no option but to cut back on spending
- Although I’ve been hit hard and should cut back, I’ll spend today and let tomorrow look after itself

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. August 2023 = 1,761.
2. Trip Intentions: UK and Overseas
Overnight domestic trip intentions are above the levels anticipated back in August 2022, 74% planning a trip in the next 12 months compared to 67% a year earlier.

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. August 2022 = 1,759, August 2023 = 1,761. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
For overnight overseas trips, intentions are also above 2022 levels, in particular between October and December 2023.

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

- At any point in the next 12 months: August 2023 data = 56%, August 2022 data = 47%
- August-September trip: August 2023 data = 15%, August 2022 data = 12%
- October-December trip: August 2023 data = 22%, August 2022 data = 16%
- No plans / would never do this: August 2023 data = 37%, August 2022 data = 45%

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. August 2022 = 1,759, August 2023 = 1,761. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Both long term domestic and overseas overnight trip intentions have remained relatively stable since April this year.

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, August 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? 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. August 2023 = 1,761. 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 those taken in the last 12 months and have increased – overseas intentions are still below.

**Figure 7. Number of UK overnight trips likely to take in next 12 months compared to last 12 months, Percentage, August 2023, UK**

<table>
<thead>
<tr>
<th></th>
<th>April 2023 data</th>
<th>May 2023 data</th>
<th>June 2023 data</th>
<th>July 2023 data</th>
<th>August 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will take more</td>
<td>24</td>
<td>28</td>
<td>25</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>Will take the same</td>
<td>37</td>
<td>36</td>
<td>39</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Will take fewer</td>
<td>23</td>
<td>23</td>
<td>21</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>Don’t know/not sure yet</td>
<td>15</td>
<td>13</td>
<td>15</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Net (‘more’ minus ‘fewer’)</td>
<td>15</td>
<td>16</td>
<td>14</td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>

**Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, August 2023, UK**

<table>
<thead>
<tr>
<th></th>
<th>April 2023 data</th>
<th>May 2023 data</th>
<th>June 2023 data</th>
<th>July 2023 data</th>
<th>August 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will take more</td>
<td>16</td>
<td>16</td>
<td>15</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Will take the same</td>
<td>30</td>
<td>30</td>
<td>31</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Will take fewer</td>
<td>32</td>
<td>34</td>
<td>33</td>
<td>34</td>
<td>36</td>
</tr>
<tr>
<td>Don’t know/not sure yet</td>
<td>22</td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>19</td>
</tr>
<tr>
<td>Net (‘more’ minus ‘fewer’)</td>
<td>22</td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>19</td>
</tr>
</tbody>
</table>

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 than you took in the last 12 months? Base: All respondents. August 2023 = 1,761.
38% of respondents indicated they are more likely to choose a trip in the UK than overseas, compared to the last 12 months – the top reason being ‘UK holidays are cheaper’ (53%)

Figure 9. Difference in short break/holiday choices in the next 6 months compared to last 12 months, Percentage, August 2023, UK

- More likely to choose UK than overseas
- More likely to choose overseas than UK
- Broadly the same as past 12 months
- Don’t know/It depends on the situation

TOP 5 reasons for UK preference
1. UK holidays are cheaper (53%)
2. UK holidays are easier to plan (51%)
3. Shorter / quicker travel (48%)
4. To avoid long queues at airports/cancelled flights (42%)
5. I want to take holidays in places I am familiar with (25%)

TOP 5 reasons for Overseas preference
1. Better weather (52%)
2. I want to visit new places/experience new cultures (40%)
3. Overseas holidays are cheaper (27%)
4. I’m prioritising overseas trips after missing out in the last few years (27%)
5. To visit friends and relatives (16%)

FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.
The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ with the top 4 remaining in the same position as in July 2023.

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, August 2023, UK

- Rising cost of living: 36%
- UK weather: 34%
- Personal finances: 28%
- Rising costs of holidays/leisure: 27%
- My general health: 18%
- The cost of fuel: 16%
- Limited available annual leave: 15%
- I wouldn’t take a UK short break or holiday in the next six months regardless of the circumstances: 10%
- Difficulty getting money back if a trip is cancelled: 7%
- None/ No barriers: 14%

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. August 2023 = 1,761. *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 ‘rising cost of living’ has consistently been the biggest financial barrier to taking an overnight domestic trip, and has been consistent the last 3 months.

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. August 2023 = 1,761.
Focusing on barriers related directly to the cost of a domestic overnight trip, the ‘cost of accommodation’ remains at the top, followed by ‘cost of drinking/eating out’ which continues to rise.

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: August 2023 = 1,761
UK adults plan to cut their overnight trip spending mainly on accommodation, activities and eating out. 31% will cut the number of trips, slightly below the previous wave.

Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, August 2023, UK, Full list

- Choose cheaper accommodation: 32%
- Look for more ‘free things’ to do: 30%
- Spend less on eating out: 28%
- Cut back on buying gifts/shopping at the destination: 19%
- Take fewer UK short breaks/holidays: 17%
- Travel when it's cheaper (i.e. outside of busier time periods): 17%
- Choose self-catering accommodation: 16%
- Do fewer activities: 15%
- Take shorter UK short breaks/holidays: 14%
- Visit fewer visitor attractions: 14%
- Take a holiday in the UK instead of overseas: 12%
- Stay with friends or relatives: 12%
- Travel less at the destination: 11%
- Take day trips instead of UK short breaks/holidays: 10%
- Take UK short breaks/holidays closer to home: 9%
- 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: 23%

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: August 2023 = 1,761.

Reduce the number of UK overnight trips

<table>
<thead>
<tr>
<th>NET 'fewer', 'not go', 'go day trips instead'</th>
<th>May 2023 data</th>
<th>June 2023 data</th>
<th>July 2023 data</th>
<th>August 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>29%</td>
<td>33%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

May 2023 data

- Reduce the number of UK overnight trips
- NET 'fewer', 'not go', 'go day trips instead' 30%
In terms of UK day trips, 30% of UK adults intend to look for more free things to do. 34% will reduce the number of day trips – consistent with July 2023

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

- Look for more ‘free things’ to do: 30%
- Take fewer day trips: 25%
- Spend less on eating out: 25%
- Cut back on buying gifts/shopping: 21%
- Will travel when it’s cheaper (i.e. outside of busier time periods): 21%
- Take day trips closer to home: 18%
- Do fewer activities: 17%
- Visit fewer visitor attractions: 16%
- Will not go on day trips: 11%
- The cost of living crisis isn’t likely to influence my day trips at all: 27%

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: August 2023 = 1,761.
Over the next 12 months, UK adults are more likely to visit outdoor areas and practice leisure or sports activities, while are less likely to attend entertainment activities and wellbeing activities.

Figure 14. Leisure venues and activities more or less likely to visit/do compared to last 12 months, Net: ‘more likely’ minus ‘Less likely’, Percentage, UK, August 2023

Outdoor Areas (Mountain or hills, Beach or coastal walk/trail)
Leisure or sports activities (walking, cycling, swimming, etc.)
Visitor Attractions (museums, art galleries, indoor activities, etc.)
Entertainment and events (restaurants, cinemas, festivals, etc.)
Wellbeing Activities (spa/beauty/wellness retreats, etc.)

Question: VB9ai. Thinking about your personal finances, which, if any, of these types of places in the UK are you more likely to visit in the next 12 months, compared to the last 12 months? VB9bi. Still thinking about your personal finances, which, if any, are you less likely to visit in the next 12 months compared to the last 12 months? VB10ai. Again thinking about your personal finances, which, if any, of these types of activities are you more likely to do in the next 12 months, compared to the last 12 months? VB10bi. And which, if any, are you less likely to do in the next 12 months compared to the last 12 months?

Base: August 2023 = 1,761.
3. The Next Trip: Overnight and Day Trips
47% of UK adults have already booked their **domestic** trips for September, while 73% have already booked their **overseas** trips for that month.

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

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Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: September 2023 n = 246, October 2023 n = 224, November 2023 n = 78, December 2023 n = 77. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: September n = 147, October 2023 n = 124, November 2023 n = 79, December 2023 n = 91.
Compared to 2022, upcoming trips between September and December are more likely to be short breaks than longer trips.

Figure 17. Length of next UK holiday or short break by time period, Percentage, August 2023, UK

Question: QVB3. Is this next trip to <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All August 2023 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: September 2023 n = 224, October 2023 n = 224, November 2023 n = 78, December 2023 n = 77. UK trip 2021-2022: September trip n = 229, October trip n = 163, November trip n = 65, December trip n = 90.
As in 2022, the South West is the most preferred UK overnight destination in both August-September and October-December, although the latter only just ahead of London.

Figure 18. Where planning on staying on next UK overnight trip in August to September 2023, Percentage, July 2023 and August 2023, UK

Figure 19. Where planning on staying on next UK overnight trip in October to December 2023, Percentage, July 2023 and August 2023, UK

Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?

Base: All July 2023 and August 2023 respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 1,188, October to December n = 668; August to September 2022 n = 988 October to December 2022 n = 599. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.
The top type of destination for an overnight trip in August-September is ‘traditional coastal/seaside town’. ‘City or large town’ is most preferred in October-December.

Figure 20. Types of destination for trip in August to September 2023, Percentage, July 2023 and August 2023, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>July 2023/August 2023</th>
<th>July 2022/August 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>37</td>
<td>34</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>30</td>
<td>32</td>
</tr>
<tr>
<td>A city or large town</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>12</td>
<td>13</td>
</tr>
</tbody>
</table>

Figure 21. Types of destination for overnight trip in October to December 2023, Percentage, July 2023 and August 2023, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>June 2023/July 2023</th>
<th>June 2022/July 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>A city or large town</td>
<td>31</td>
<td>27</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>29</td>
<td>32</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>18</td>
<td>23</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>15</td>
<td>17</td>
</tr>
</tbody>
</table>

Question: VB5. Which of the following best describes the main types of destinations you are likely to stay in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All July 2023 and August 2023 respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 1,188 October to December n = 668; August to September 2022 n = 988 October to December 2022 n = 599.
For both time periods, own car is the most common mode of travel, followed by train.

Figure 22. Top 5 main modes of travel to destination for trip in August to September 2023, Percentage, July 2023 and August 2023, UK

- July 2023/August 2023 data
- July 2022/August 2022 data

Figure 23. Top 5 main modes of travel to destination for overnight trip in October to December 2023, Percentage, July 2023 and August 2023, UK

- July 2023/August 2023 data
- July 2022/August 2022 data

Question: VB4c. What do you anticipate being the main mode of travel to your next UK holiday or short break in [INSERT DESTINATION FROM VB4A] in [INSERT MONTH FROM VB2A]? Base: All July 2023 and August 2023 respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 1,188 October to December n = 668; August to September 2022 n = 988 October to December 2022 n =599.
For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type, followed by a ‘rented house or similar’

Figure 24. Top 10 accommodation types planning on staying in on next UK overnight trip August to September 2023, Percentage, July 2023 and August 2023, UK

Figure 25. Top 10 accommodation types planning on staying in on next UK overnight trip in October to December 2023, Percentage, July 2023 and August 2023, UK

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 <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All July 2023 and August 2023 respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 1,188 October to December n = 668; July to September 2022 n = 988 October to December 2022 n = 599.
‘Partner’ is the most common companion on a trip during both time periods, followed by ‘child, grandchild or young adult’

<table>
<thead>
<tr>
<th></th>
<th>Partner</th>
<th>Child, grandchild, or young adults with parents</th>
<th>Friends</th>
<th>Other members of family</th>
<th>Pets</th>
<th>Your parents (of adults aged 25+ only)</th>
<th>Intend to travel on my own</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2023/August 2023</td>
<td>56</td>
<td>36</td>
<td>18</td>
<td>14</td>
<td>9</td>
<td>7</td>
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<tr>
<td>July 2022/August 2022</td>
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<td>30</td>
<td>16</td>
<td>17</td>
<td>10</td>
<td>7</td>
<td>4</td>
</tr>
</tbody>
</table>

Figure 26. Visitor party make-up for trip in August to September 2023, Percentage, July 2023 and August 2023, UK

<table>
<thead>
<tr>
<th></th>
<th>Partner</th>
<th>Child, grandchild, or young adults with parents</th>
<th>Friends</th>
<th>Other members of family</th>
<th>Pets</th>
<th>Your parents (of adults aged 25+ only)</th>
<th>Intend to travel on my own</th>
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<tr>
<td>July 2023/August 2023</td>
<td>51</td>
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<td>July 2022/August 2022</td>
<td>48</td>
<td>30</td>
<td>19</td>
<td>15</td>
<td>15</td>
<td>10</td>
<td>7</td>
</tr>
</tbody>
</table>

Figure 27. Visitor party make-up for trips taken from trip in in October to December 2023, Percentage, July 2023 and August 2023, UK

Question: QVB4d. With whom are you likely to spend your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2a>? Base: All July 2023 and August 2023 respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 1,188 October to December n = 668; July to September 2022 n = 988 October to December 2022 n =599.
The top motivation for overnight trips in August-September is ‘to get away from it all and have a rest’, while in October-December this is shared with ‘family time or time with my partner’.
In August-September the top activity is ‘walking, hiking or rambling’, while in October-December it is ‘trying local food and drink’

Figure 30. Activities for UK holidays and short breaks, in August-September 2023, Percentage, August 2023, UK, Full list

- Walking, Hiking or Rambling: 42%
- Trying local food and drink: 39%
- Visit heritage sites: 29%
- Explore scenic areas by car: 24%
- Visit family attractions: 22%
- Visit cultural attractions: 21%
- Nature and wildlife experiences: 21%
- Experience the nightlife: 16%
- Learn about local history and culture: 16%
- Adventure activities: 12%
- Water sports: 9%
- Visit locations featured in TV, film or…: 9%
- Speciality shopping (e.g. for something…): 9%
- Health or wellbeing experiences: 9%
- Creative or artistic pursuits: 6%
- Cycling or mountain biking: 5%
- Conservation or volunteering activities: 3%
- Golf: 2%

Figure 31. Activities for UK holidays and short breaks in October-December 2023, Percentage, August 2023, UK, Full list

- Trying local food and drink: 37%
- Walking, Hiking or Rambling: 31%
- Visit cultural attractions: 21%
- Explore scenic areas by car: 20%
- Visit heritage sites: 19%
- Nature and wildlife experiences: 18%
- Visit family attractions: 17%
- Experience the nightlife: 17%
- Learn about local history and culture: 15%
- Speciality shopping: 12%
- Health or wellbeing experiences: 11%
- Visit locations featured in TV, film or…: 11%
- Water sports: 10%
- Creative or artistic pursuits: 9%
- Adventure activities: 8%
- Cycling or mountain biking: 7%
- Conservation or volunteering activities: 5%
- Golf: 3%

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: All August respondents planning on taking a holiday or short break in the UK between August to September 2023 n = 559, October to December n = 379.
Note: Multiple choice question. Totals may exceed 100%.
4. Past UK and Overseas Trips
More than 3 in 5 (61%) have taken a UK overnight trip between August 2022 and July 2023, while 44% have taken an overseas overnight trip in that time period.

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, August 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. August 2023 = 1,761.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip.
South West was the most popular destination for domestic trips in the past three months and the main purpose was for holiday/leisure.

Figure 33. Destination of overnight trips taken in UK in the past three months, Percentage, August 2023, UK

Figure 34. Purpose of overnight UK trip taken in the past three months, Percentage, August 2023, UK

Question: VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH>?
Base: All August 2023 respondents that took an overnight trips in the last three months n= 432
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose.
5. Overnight Business Trip Intentions (July 2023 data)

Note: * Overnight Business Trip Intentions questions are asked every second month
18% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Conference’ is the leading reason (29%), followed by ‘Exhibition/ Event/ Trade fair’ (at 25%).

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: July 2023 respondents currently in employment n = 1,411. All taking a business trip n=361.
Methodology & Further Data
Methodology

- This report presents findings from the August 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 6th phase of this project started in April 2023 and will run until March 2024.

- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis’ impact on trips intentions. It 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 6th phase and the previous phases / waves.
• 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

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 last 12 months
• VB9a/b. More/Less likely to visit leisure places in the UK in the next 12 months, vs last 12 months
• VB10a/b. More/Less likely to conduct leisure activities in the UK in the next 12 months, vs last 12 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.