Domestic Sentiment Tracker: March 2023

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

- **April to June 2023 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between *April to June 2023*

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

<table>
<thead>
<tr>
<th>Key Metrics</th>
<th>March 2023</th>
<th>Change since February 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>57%</td>
<td>-5%*</td>
</tr>
<tr>
<td>Proportion intending a UK overnight trip at any point in the next 12 months</td>
<td>73%</td>
<td>+1%</td>
</tr>
<tr>
<td>Proportion intending an overseas overnight trip at any point in the next 12 months</td>
<td>54%</td>
<td>+3%</td>
</tr>
<tr>
<td>Preference for UK over overseas in the next 6 months (vs pre-pandemic)</td>
<td>33%</td>
<td>-3%</td>
</tr>
<tr>
<td>Took a domestic overnight trip in the past 12 months (March 2022 – Feb 2023)</td>
<td>57%</td>
<td>-4%*</td>
</tr>
<tr>
<td>Net proportion of UK trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]</td>
<td>3%</td>
<td>-1%</td>
</tr>
<tr>
<td>Net proportion of overseas trips in the next 12 months vs pre-pandemic [% ‘more’ minus % ‘fewer’ trips]</td>
<td>-15%</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>29%</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>1st Rising cost of living; 2nd Personal finances; 3rd Rising costs of holidays</td>
<td>No change</td>
</tr>
</tbody>
</table>

* Represents a statistically significant change on previous wave
1. Current General Sentiment
The proportion that think ‘the worst has passed’ in relation to the cost of living crisis has increased for the second consecutive wave.

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. March 2023 = 1,755

- The worst is still to come
- Things are going to stay the same
- The worst has passed
The majority of UK adults (72%) are either ‘cautious and being very careful’ (49%) or have been ‘hit hard and are cutting back’ (23%) due to the cost of living crisis.

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

<table>
<thead>
<tr>
<th>Month</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun’22</td>
<td>I’m one of the lucky ones – better off than before the crisis</td>
</tr>
<tr>
<td>Jul’22</td>
<td>I’m alright – the ‘cost of living crisis’ has not really affected me and confident it won’t</td>
</tr>
<tr>
<td>Aug’22</td>
<td>I’m cautious - things are OK but I feel I have to be very careful</td>
</tr>
<tr>
<td>Sep’22</td>
<td>I’ve been hit hard – no option but to cut back on spending</td>
</tr>
<tr>
<td>Oct’22</td>
<td>Although I’ve been hit hard and should cut back, I’ll spend today and let tomorrow look after itself</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun’22</td>
<td>9</td>
</tr>
<tr>
<td>Jul’22</td>
<td>8</td>
</tr>
<tr>
<td>Aug’22</td>
<td>7</td>
</tr>
<tr>
<td>Sep’22</td>
<td>7</td>
</tr>
<tr>
<td>Oct’22</td>
<td>6</td>
</tr>
<tr>
<td>Nov’22</td>
<td>8</td>
</tr>
<tr>
<td>Dec’22</td>
<td>9</td>
</tr>
<tr>
<td>Jan’23</td>
<td>7</td>
</tr>
<tr>
<td>Feb’23</td>
<td>8</td>
</tr>
<tr>
<td>March’23</td>
<td>7</td>
</tr>
</tbody>
</table>

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. March 2023 = 1,755.
2. Trip Intentions: UK and Overseas
Overnight domestic trip intentions are above the levels anticipated back in March 2022, 73% planning a trip in the next 12 months compared to 61% a year earlier.

Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, March 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. March 2022 = 1,756, March 2023 = 1,755. 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 much higher than in March 2022, in particular between July and September.

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

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. March 2022 = 1,756, March 2023 = 1,755. 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 steadily increased since December 2022.

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

- UK overnight trip
- Overseas overnight trip

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. March 2023 = 1,755. 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 still marginally above pre-pandemic levels – overseas intentions still below.

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

- Will take more: 31, 27, 21, 25, 23, 25, 25, 24
- Will take about the same: 37, 36, 38, 37, 38, 38, 38, 38
- Will take fewer: 15, 19, 24, 21, 20, 19, 20, 21
- Don’t know/not sure yet: 17, 16, 19, 16, 17, 17, 17, 17

**Figure 8.** Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, March 2023, UK

- Will take more: 16, 16, 11, 14, 13, 15, 14, 15
- Will take about the same: 29, 28, 30, 32, 30, 29, 30, 33
- Will take fewer: 30, 30, 34, 31, 32, 30, 34, 30
- Don’t know/not sure yet: 25, 26, 25, 23, 25, 26, 22, 22

**Net (‘more’ minus ‘fewer’)**

- Aug 2022 data: 16
- Sep 2022 data: 14
- Oct 2022 data: -22
- Nov 2022 data: -17
- Dec 2022 data: -19
- Jan 2023 data: -15
- Feb 2023 data: -20
- Mar 2023 data: -15

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. March 2023 = 1,755.
33% 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’ (56%)

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

TOP 5 reasons for UK preference
1. UK holidays are easier to plan (56%)
2. UK holidays are cheaper (49%)
3. Shorter / quicker travel (39%)
4. To avoid long queues at airports/cancelled flights (31%)
5. I want to take holidays in places I am familiar with (30%)

TOP 5 reasons for Overseas preference
1. Better weather (45%)
2. I want to visit new places (41%)
3. I want to explore other cultures (35%)
4. I’m prioritising overseas trips after missing out during the pandemic (25%)
5. Overseas holidays are cheaper (23%)

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. March 2023 = 1,755.

VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? March 2023 = 588.

VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? March 2023 = 437.
The proportion more likely to choose an overseas trip than a domestic trip is at its highest since June 2022

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

Base: All respondents. March 2023 = 1,755.
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, March 2023, UK

<table>
<thead>
<tr>
<th>Barrier</th>
<th>March 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising cost of living</td>
<td>39%</td>
</tr>
<tr>
<td>Personal finances</td>
<td>28%</td>
</tr>
<tr>
<td>Rising costs of holidays/leisure</td>
<td>26%</td>
</tr>
<tr>
<td>UK weather</td>
<td>26%</td>
</tr>
<tr>
<td>The cost of fuel</td>
<td>19%</td>
</tr>
<tr>
<td>My general health</td>
<td>17%</td>
</tr>
<tr>
<td>Limited available annual leave</td>
<td>17%</td>
</tr>
<tr>
<td>I wouldn’t take a UK short break or holiday in the next six months regardless of the circumstances</td>
<td>13%</td>
</tr>
<tr>
<td>I have concerns about catching COVID-19</td>
<td>11%</td>
</tr>
<tr>
<td>None/ No barriers</td>
<td>13%</td>
</tr>
</tbody>
</table>

NET: Costs 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.

Figure 10b. Perceived financial barriers to an overnight trip in the UK in next 6 months, Wave-on-wave, Percentage, UK

- Rising cost of living
- Rising costs of holidays/leisure
- Personal finances

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. March 2023 = 1,755.
Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of accommodation remains at the top, now followed by cost drinking/eating out. The cost of fuel continues to decline as a barrier.

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: March 2023 = 1755.
UK adults plan to cut their overnight trip spending mainly on accommodation, activities and eating out. 29% will cut the number of trips, in line with data from the previous three waves.

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

- Choose cheaper accommodation: 29
- Look for more ‘free things’ to do: 28
- Spend less on eating out: 28
- Travel when it’s cheaper (i.e. outside of busier time periods): 19
- Cut back on buying gifts/shopping at the destination: 19
- Choose self-catering accommodation: 17
- Take fewer UK short breaks/holidays: 16
- Do fewer activities: 16
- Visit fewer visitor attractions: 16
- Stay with friends or relatives: 12
- Take a holiday in the UK instead of overseas: 12
- Travel less at the destination: 11
- Take shorter UK short breaks/holidays: 11
- Take UK short breaks/holidays closer to home: 10
- Take day trips instead of UK short breaks/holidays: 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: 25

<table>
<thead>
<tr>
<th>Reduce the number of UK overnight trips</th>
<th>Decemb er 2022 data</th>
<th>January 2023 data</th>
<th>Februar y 2023 data</th>
<th>March 2023 data</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ‘fewer’, ‘not go’, ‘go day trips instead’</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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: March 2023 = 1755.
In terms of UK day trips, 28% of UK adults intend to look for more free things to do. 34% will reduce the number of day trips – in line with the last two waves

**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:** March 2023 = 1755.
The top destination type for an overnight domestic trip up to May 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, March 2023, UK

<table>
<thead>
<tr>
<th>Mar’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>33</td>
<td>35</td>
<td>49</td>
<td>39</td>
<td>46</td>
<td>31</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: March 2023 = 1,755.
3. The Next Trip: Overnight and Day Trips
64% of UK adults have already booked their **domestic** trips for April, while 81% have already booked their **overseas** trips for that month.
Domestic April trips are more likely to be booked within a month of going, while this is 1 to 3 months ahead for overseas April trips.

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

Question: VB2f. Roughly how much time is there likely to be between you booking your next overnight UK trip in April 2023 and the first day of your trip? UK trip: April 2023 n = 135, May 2023 n = 160, June 2023 n = 173, July 2023 n = 223. VB2h. Roughly how much time is there likely to be between you booking your next overnight OVERSEAS trip in April 2023 and the first day of your trip? Overseas trip: April 2023 n = 53, May 2023 n = 117, June 2023 n = 132, July 2023 n = 141.
In April, short breaks are more common than longer breaks. In May and June, longer breaks are marginally more likely, with July dominated by longer trips.

Figure 17. Length of next UK holiday or short break by time period, Percentage, March 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)?
The South West is the most preferred UK overnight destination in both time periods, consistent with intentions in 2022.

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

- February 2023/March 2023 data
- February 2023/March 2022 data

Figure 19. Where planning on staying on next UK overnight trip in July to September 2023, Percentage, February 2023 to March 2023, UK

- February 2023/March 2023 data
- February 2023/March 2022 data

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

Base: All February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952 July to September 2023 n =1014; April to June 2022 n = 743 July to September 2022 n =804. 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 – the latter slightly more likely than in 2022.

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

Figure 21. Top 5 main modes of travel to destination for overnight trip in July to September 2023, Percentage, February 2023 to March 2023, UK

For the full list of modes of transport, please see the published tables.

Question: QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?

Base: All February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1014; April to June 2022 n = 743, July to September 2022 n = 804
For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type.
‘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 April to June 2023. Percentage, February 2023 to March 2023, UK

Figure 25. Visitor party make-up for trips taken from trip in July to September 2023. Percentage, February 2023 to March 2023, UK

Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All February 2023 to March 2023 respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 952, July to September 2023 n = 1014; April to June 2022 n = 743, July to September 2022 n = 804. Totals may exceed 100% as some respondents anticipate a range of party types.
The top motivation for an overnight trip in April-June is ‘family time or time with my partner’, and in July-September it is ‘to get away from it all and have a rest’

<table>
<thead>
<tr>
<th>Motivation</th>
<th>April-June</th>
<th>July-September</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family time or time with my partner</td>
<td>43</td>
<td>38</td>
</tr>
<tr>
<td>To get away from it all and have a rest</td>
<td>37</td>
<td>44</td>
</tr>
<tr>
<td>To connect with nature / be outdoors</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>To spend time with friends</td>
<td>20</td>
<td>17</td>
</tr>
<tr>
<td>To travel somewhere new</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>To celebrate a special occasion</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>For an active holiday, with exercise or sport</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Because of a particular interest</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>For adventure or a challenge</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>To go somewhere where there was great food</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>To learn something new</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>To go somewhere luxurious</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>For a technology detox</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>

Question: VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All February respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 468, July to September 2023 n = 555.
Note: Multiple choice question. Totals may exceed 100%.
In April-June, ‘trying local food and drink’ is the top activity, while the top ones in July-September are ‘walking, hiking or rambling’ and ‘trying local food and drink’.

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

- Trying local food and drink: 41%
- Walking, Hiking or Rambling: 38%
- Visit heritage sites: 28%
- Explore scenic areas by car: 28%
- Visit cultural attractions: 22%
- Visit family attractions: 19%
- Nature and wildlife experiences: 17%
- Learn about local history and culture: 16%
- Experience the nightlife: 14%
- Adventure activities: 11%
- Speciality shopping: 10%
- Water sports: 10%
- Visit locations featured in TV, film or…: 9%
- Health or wellbeing experiences: 7%
- Cycling or mountain biking: 6%
- Creative or artistic pursuits: 6%
- Conservation or volunteering activities: 3%
- Golf: 3%

Figure 29. Activities for UK holidays and short breaks in July-September 2023, Percentage, March 2023, UK, Full list

- Walking, Hiking or Rambling: 38%
- Trying local food and drink: 38%
- Visit heritage sites: 26%
- Visit family attractions: 25%
- Visit cultural attractions: 24%
- Explore scenic areas by car: 23%
- Learn about local history and culture: 21%
- Nature and wildlife experiences: 20%
- Experience the nightlife: 17%
- Speciality shopping: 15%
- Adventure activities: 14%
- Health or wellbeing experiences: 10%
- Water sports: 10%
- Visit locations featured in TV, film or…: 8%
- Cycling or mountain biking: 7%
- Creative or artistic pursuits: 6%
- Golf: 4%
- Conservation or volunteering activities: 4%

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 February respondents planning on taking a holiday or short break in the UK between April to June 2023 n = 468, July to September 2023 n = 555.

Note: Multiple choice question. Totals may exceed 100%.
16% of UK adults intend to take any **day trip** by the end of March. ‘Countryside or village’ is the top day trip destination until June. By September 2023 ‘traditional coastal town’ leads.

**Figure 30. Next UK day trip intention between March 2023 and December 2023, Cumulative percentages, March 2023, UK**

Any day trip by the end of the current month: 16%
(15% for intentions stated in February, and 14% in January)

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: March 2023 = 1,755
4. Past UK and Overseas Trips
Almost 3 in 5 (57%) have taken a UK overnight trip between March 2022 and February 2023, while 42% have taken an overseas overnight trip in that time period.

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

Question: VB13a/f. 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. March 2023 = 1,755.
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip.
London (20%) was the most popular destination for domestic trips in the past three months. The majority were for a proper holiday/leisure purpose.

Figure 32. Destination of overnight trips taken in UK in the past three months, Percentage, March 2023, UK

Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, March 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 March 2023 respondents that took an overnight trips in the last three months n= 263.
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 (March 2023 data)

Note: * Overnight Business Trip Intentions questions are asked every second month
20% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Conference’ is the leading reason (30%), followed by ‘team building’ (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: March 2023 respondents currently in employment n = 1,341. All taking a business trip n=314.
Methodology & Further Data
Methodology

- This report presents findings from the March 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.
Master Data Table

- 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.