Domestic Sentiment Tracker: Profiling Report

Published: 6th October 2022
Fieldwork Period: July to September 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 July to September 2022 fieldwork. Fieldwork periods are as follows: July (1st to 7th July); August (1st to 7th August); September (1st to 7th September).
Definitions used within this report (1)

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

1. Autumn Intenders: UK adults who intend to take a domestic overnight trip between October and December 2022
2. Winter Intenders: UK adults who intend to take a domestic overnight trip between January and March 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 Autumn Intenders by destination type. All individual destination types have sufficient base sizes among Autumn 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:** Autumn Intenders planning on taking an overnight trip to a ‘large city’ in the Autumn period
- **City Non-Intenders:** Autumn Intenders not planning on taking an overnight trip to a ‘large city’ in the Autumn period

Chapter 5 looks at Autumn 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
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 4 in 5 are concerned about the cost of living crisis, expecting ‘the worst still to come’, with Retirees and social grade DE most sceptical.

Figure 1. Perception of the situation with regards to the cost of living crisis by life stage, September 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=1,758. Pre-Nesters n=383; Families n=682; Older Independents n=442; Retirees n=251; Social Grades AB n=514; C1 n=257; C2 n=375; DE n=612
Older Independents are most likely to have been ‘hit hard’ by the cost of living crisis, while those in AB social grade are more likely than others to say they are actually ‘better off’ or ‘not affected’.

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

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=1,758, Pre-Nesters n=383; Families n=682; Older Independents n=442; Retirees n=251; Social Grades AB n=514; C1 n=257; C2 n=375; DE n=612
Confidence in the ability to take an overnight domestic trip does not vary much by life stage but correlates with social grade – higher social grades reporting stronger confidence.

Figure 3. Confidence in ability to take an overnight domestic trip by life stage, Percentage, September data, UK and Scotland

- Pre-nesters
- Families
- Older Independents
- Retirees

October: 70, 67, 68, 70
November: 63, 63, 62, 67
December: 64, 60, 63, 64

Figure 4. Confidence in ability to take an overnight domestic trip by social grade, Percentage, September data, UK and Scotland

- Social Grade AB
- Social Grade C1
- Social Grade C2
- Social Grade DE

October: 76, 71, 68, 60
November: 72, 64, 64, 55
December: 69, 68, 60, 54

Question: VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?

Base: Pre-Nesters n=383; Families n=682; Older Independents n=442; Retirees n=251; Social Grades AB n=514; C1 n=257; C2 n=375; DE n=612
In regards to Covid, Pre-Nesters and social grade C1 are most optimistic (55% saying ‘the worst has passed’), while Families are more likely than others to say that the ‘worst is still to come’.

Figure 5. Perception of the situation with regards to COVID-19 by life stage, September data, Percentage, UK
2. Autumn and Winter Intenders Profile
Intentions for an overnight UK trip in October to December are consistent with the same period last year, while January to March intentions are significantly higher than in 2020 and 2021.

Figure 6. Proportion anticipating going on any overnight UK trips, Percentage, September 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. September 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 and Pre-Nesters among Trip Intenders, while Non-Intenders are dominated by Retirees and Older Independents.

Figure 7. Life stage by UK overnight trip intention, Percentage, July to September 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=5,276; Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
Both Autumn and Winter Intenders are more likely than average to be social grades AB. Non-Intenders are more likely to be social grades DE.

Figure 8. Social grade by UK overnight trip intention, Percentage, July to September data, UK

Source: Demographic questions. Base: Total n=5,276; Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
Autumn Intenders are slightly more comfortable than Winter Intenders with most everyday activities.

Figure 9. Level of comfort conducting a range of activities, NET very and fairly comfortable, Percentage, July to September data, UK
Those planning a trip in autumn have a high level of confidence their autumn trip will go ahead. Winter Intenders’ confidence picks up in winter, encouraging them to go on a trip then.

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, July to September 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: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
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, July to September data, UK

Rising cost of living
The cost of fuel
UK weather
Rising costs of holidays/leisure
Personal finances
Limited available annual leave
My general health
I have concerns about catching COVID-19
Prioritising overseas travel after missing out during the pandemic
I have a general unease about travelling

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: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
The rising cost of living has consistently been the top potential barrier to taking a UK holiday or short break, and has increased by 10% over the past 5 months.

Figure 12. Potential barriers to taking a UK short break or holiday in next six months, Wave-on-wave, Percentage, UK

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: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
The cost of living crisis is most likely to influence Autumn and Winter Intenders’ behaviour through ‘choosing cheaper accommodation’, ‘spending less on eating out’ and ‘looking for more free things to do’.

**Figure 13. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, July to September data, UK, Top 10**

- I will choose cheaper accommodation: Autumn Intenders 35%, Winter Intenders 31%, Non-Intenders 29%
- I will spend less on eating out: Autumn Intenders 31%, Winter Intenders 27%, Non-Intenders 26%
- I will look for more ‘free things’ to do: Autumn Intenders 35%, Winter Intenders 30%, Non-Intenders 26%
- I will cut back on buying gifts/shopping at the destination: Autumn Intenders 24%, Winter Intenders 20%, Non-Intenders 17%
- I will take fewer UK short breaks/holidays: Autumn Intenders 20%, Winter Intenders 17%, Non-Intenders 16%
- I will choose self-catering accommodation: Autumn Intenders 16%, Winter Intenders 15%, Non-Intenders 13%
- I will visit fewer visitor attractions: Autumn Intenders 18%, Winter Intenders 17%, Non-Intenders 16%
- I will do fewer activities: Autumn Intenders 16%, Winter Intenders 15%, Non-Intenders 15%
- I will take shorter UK short breaks/holidays: Autumn Intenders 10%, Winter Intenders 16%, Non-Intenders 16%
- I will stay with friends or relatives: Autumn Intenders 13%, Winter Intenders 16%, Non-Intenders 16%

The cost of living crisis isn’t likely to influence my UK short breaks/holidays at all: Autumn Intenders 21%, Winter Intenders 20%, Non-Intenders 28%
Focusing on day trips, the ‘cost of living crisis’ is most likely to encourage trip intenders to ‘look for more free things to do’, ‘take fewer day trips’ and ‘spend less on eating out’.

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

- I will look for more ‘free things’ to do on day trips: 34% (Autumn Intenders), 32% (Winter Intenders), 33% (Non-Intenders)
- I will take fewer day trips: 28% (Autumn Intenders), 27% (Winter Intenders), 29% (Non-Intenders)
- I will spend less on eating out on day trips: 29% (Autumn Intenders), 28% (Winter Intenders), 30% (Non-Intenders)
- I will cut back on buying gifts/shopping on day trips: 25% (Autumn Intenders), 24% (Winter Intenders), 27% (Non-Intenders)
- I will take day trips closer to home: 23% (Autumn Intenders), 22% (Winter Intenders), 21% (Non-Intenders)
- I will visit fewer visitor attractions on day trips: 20% (Autumn Intenders), 20% (Winter Intenders), 20% (Non-Intenders)
- I will do fewer activities on day trips: 19% (Autumn Intenders), 18% (Winter Intenders), 20% (Non-Intenders)
- I will not go on day trips: 11% (Autumn Intenders), 15% (Winter Intenders), 19% (Non-Intenders)
- The cost of living crisis isn’t likely to influence my day trips at all: 32% (Autumn Intenders), 32% (Winter Intenders), 34% (Non-Intenders)

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

Base: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
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, July to September data, UK, Full list

- Family time or time with my partner: 39%
- To get away from it all and have a rest: 38%
- To travel somewhere new: 17%
- To spend time with friends: 18%
- To connect with nature / be outdoors: 18%
- To celebrate a special occasion, such as birthday or anniversary: 14%
- To go somewhere where there was great food: 11%
- For adventure or a challenge: 11%
- To go somewhere luxurious where I could feel pampered: 11%
- Because of a particular interest (e.g. sport, music, festival, etc.): 9%
- To learn something new: 9%
- For an active holiday, with exercise or sport: 9%
- For a technology detox: 7%

Question: VB6fii. Which of the following best describe your motivation/s for this trip?
Base: Autumn Intenders n=1,492; Winter Intenders n=1,031
Note: Multiple choice question. Totals may exceed 100%.
The top two intended activities for both time periods are ‘trying local food and drink’ and ‘walking, hiking or rambling’, especially prominent for Autumn Intenders.
2. Autumn Intenders

Profile by Destination Type
Autumn 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 Autumn Trip, Percentage, July to September data, UK

- Considering destination type and others
- Considering only this destination type

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Considering destination type and others</th>
<th>Considering only this destination type</th>
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<tbody>
<tr>
<td>Countryside or village</td>
<td>31</td>
<td>17</td>
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<tr>
<td>Traditional coastal/seaside town</td>
<td>26</td>
<td>15</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>21</td>
<td>11</td>
</tr>
<tr>
<td>Large city</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>Smaller city or town</td>
<td>12</td>
<td>7</td>
</tr>
</tbody>
</table>
Some Autumn 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 Autumn Trips, Percentage, July to September data, UK, (Read chart vertically)

<table>
<thead>
<tr>
<th>Column %</th>
<th>Traditional coastal/seaside town</th>
<th>Countryside or village</th>
<th>Rural coastline</th>
<th>Smaller city or town</th>
<th>Large city</th>
<th>Mountains or hills</th>
</tr>
</thead>
<tbody>
<tr>
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<td>22%</td>
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<td>Smaller city or town</td>
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<td>8%</td>
<td>5%</td>
<td></td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Large city</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>14%</td>
<td>18%</td>
<td>19%</td>
<td>10%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

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; Autumn Intenders n=1,018 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.
Autumn countryside or village Intenders have a similar life stage profile to average. Behaviour is also similar. They are more likely than average to stay in a rented house or similar.

**Figure 18. Life Stage of Autumn Intenders, Percentage, July to September data, UK**

- Retirees: 17% All Autumn Intenders, 19% Countryside or village Intenders
- Older Independents: 26% All Autumn Intenders, 25% Countryside or village Intenders
- Families: 38% All Autumn Intenders, 39% Countryside or village Intenders
- Pre-Nesters: 20% All Autumn Intenders, 17% Countryside or village Intenders

**Figure 19. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK**

- All Autumn Intenders: 81%
- Countryside or village Intenders: 80%

**Figure 20. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK**

- Short break: 52%
- Longer break of 4+ nights: 43%
- Unsure: 4%

**Figure 21. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK**

- Partner: 51% All Autumn Intenders, 50% Countryside or village Intenders
- Child, grandchild or young adults: 29% All Autumn Intenders, 31% Countryside or village Intenders
- Other members of family: 16% All Autumn Intenders, 19% Countryside or village Intenders
- Friends: 18% All Autumn Intenders, 14% Countryside or village Intenders
- Pets: 8% All Autumn Intenders, 9% Countryside or village Intenders

**Figure 22. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK**

- Stayed in a rented house or similar: 24% All Autumn Intenders, 33% Countryside or village Intenders
- Hotel / Motel / Inn: 42% All Autumn Intenders, 32% Countryside or village Intenders
- Friends or relatives’ home: 20% All Autumn Intenders, 18% Countryside or village Intenders
- Guest house / B&B: 17% All Autumn Intenders, 16% Countryside or village Intenders
- Someone else’s home on a commercial basis – rental of room only: 11% All Autumn Intenders, 15% Countryside or village Intenders

Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Countryside or village Intenders n=304; Base for all other charts: Only Countryside or village Intenders n=169.
Autumn traditional seaside town Intenders are more likely than average to be Older Independents, travelling with their partner, taking longer breaks of 4+ nights and to stay in a ‘static caravan – not owned by you’.

Figure 23. Life Stage of Autumn Intenders, Percentage, July to September data, UK

Figure 24. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

Figure 25. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

Figure 26. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Figure 27. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Traditional seaside town Intenders n=267; Base for all other charts: Only Traditional seaside town Intenders n=154.
Autumn rural coastline Intenders are more likely to be Older Independents or Families, staying in rented accommodation, guest houses/B&Bs, second homes/timeshares, and hostels.

Figure 28. Life Stage of Autumn Intenders, Percentage, July to September data, UK

- Retirees: 17% All Autumn Intenders, 13% Rural Coastline Intenders
- Older Independents: 26% All Autumn Intenders, 30% Rural Coastline Intenders
- Families: 38% All Autumn Intenders, 41% Rural Coastline Intenders
- Pre-Nesters: 20% All Autumn Intenders, 17% Rural Coastline Intenders

Figure 29. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

- All Autumn Intenders: 81% Comfortable
- Rural Coastline Intenders: 78% Comfortable

Figure 30. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

- Short break: 52% All Autumn Intenders, 51% Rural Coastline Intenders
- Longer break of 4+ nights: 43% All Autumn Intenders, 29% Rural Coastline Intenders
- Unsure: 4% All Autumn Intenders, 18% Rural Coastline Intenders

Figure 31. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

- Partner: 51% All Autumn Intenders, 45% Rural Coastline Intenders
- Child, grandchild or young adults: 29% All Autumn Intenders, 23% Rural Coastline Intenders
- Friends: 18% All Autumn Intenders, 16% Rural Coastline Intenders
- Other members of your family: 16% All Autumn Intenders, 10% Rural Coastline Intenders
- Pets: 8% All Autumn Intenders, 10% Rural Coastline Intenders

Figure 32. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

- Hotel / Motel / Inn: 42% All Autumn Intenders, 39% Rural Coastline Intenders
- Staying in a rented house or similar: 24% All Autumn Intenders, 28% Rural Coastline Intenders
- Guest house / B&B: 17% All Autumn Intenders, 25% Rural Coastline Intenders
- Your second home / Timeshare: 14% All Autumn Intenders, 23% Rural Coastline Intenders
- Hostel: 13% All Autumn Intenders, 22% Rural Coastline Intenders

Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Rural coastline Intenders n=204 ; Base for all other charts: Only Rural coastline Intenders n=105.
Autumn large city Intenders are more likely than average to be Pre-Nesters, travelling with friends or partner, taking a short break and staying in a hotel/motel/inn or with friends/relatives.
Autumn mountains or hills Intenders are more likely than average to be Families, overall those going to mountains/hills are more likely to go for a longer break, stay in a rented accommodation, in friends’ home, hostel or own static caravan.

Figure 38. Life Stage of Autumn Intenders, Percentage, July to September data, UK

Figure 39. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

Figure 40. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

Figure 41. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Figure 42. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Mountains or hills Intenders n=163 ; Base for all other charts: Only Mountains or hills Intenders n=74.
Autumn smaller city or town Intenders are more likely than average to be Families. Overall, they are more likely to stay with friends or relatives or in a serviced apartment.

Figure 43. Life Stage of Autumn Intenders, Percentage, July to September data, UK

Figure 44. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

Figure 45. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

Figure 46. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Figure 47. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Smaller city or town Intenders n=112 ; Base for all other charts: Only Smaller city or town Intenders n=58.
3. Autumn 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 a clear 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 Autumn large city Intenders, London is by far the leading destination for their trips, followed by the North West region.

Figure 49. Destination region of next UK overnight trip in a large city for Autumn Intenders, Percentage, July to September data, UK
Autumn large city Intenders are generally more optimistic in regards to their perception of both Covid and the cost of living crisis.

**Figure 50. Perception of the COVID situation amongst Autumn Intenders, Percentage, July to September data, UK**

- The worst has passed: 50% Intenders, 19% Non-Intenders
- Things are going to stay the same: 31% Intenders, 32% Non-Intenders
- The worst is still to come: 19% Intenders, 24% Non-Intenders

**Figure 51. Perception of the Cost of Living crisis amongst Autumn Intenders, Percentage, July to September data, UK**

- The worst has passed: 19% Intenders, 16% Non-Intenders
- Things are going to stay the same: 14% Intenders, 12% Non-Intenders
- The worst is still to come: 67% Intenders, 72% Non-Intenders

Source: Demographic questions. Base: Autumn City Intenders n=237; Autumn City Non-Intenders (those autumn Intenders not planning on taking an overnight trip to a ‘large city’ in the Autumn period) n=781
Autumn large city Intenders are also more comfortable with a range of everyday activities related to going to a busy city centre.

Figure 52. Level of comfort conducting activities, NET very and fairly comfortable, Percentage, July to September data, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Autumn large city Intenders</th>
<th>Autumn large city Non-Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>87</td>
<td>79</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>94</td>
<td>87</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>92</td>
<td>84</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>87</td>
<td>80</td>
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<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>87</td>
<td>79</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>82</td>
<td>73</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>80</td>
<td>74</td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: City Intenders n=237; Non-City Intenders n=781
Autumn large city Intenders’ motivation for the trip is more likely to be ‘to spend time with friends’ and ‘to celebrate a special occasion’, vs. those intending to go to different destination types in autumn.

Figure 53. Motivations to take a trip amongst Autumn Trip Intenders, Percentage, July to September data, UK

- To get away from it all and have a rest: 33% Intenders, 40% Non-Intenders
- Family time or time with my partner: 31% Intenders, 41% Non-Intenders
- To spend time with friends: 17% Intenders, 23% Non-Intenders
- To travel somewhere new: 12% Intenders, 18% Non-Intenders
- To celebrate a special occasion, such as birthday or anniversary: 12% Intenders, 20% Non-Intenders
- Because of a particular interest (e.g. sport, music, festival, etc.): 8% Intenders, 17% Non-Intenders
- For adventure or a challenge: 10% Intenders, 16% Non-Intenders
- To go somewhere where there was great food: 14% Intenders, 11% Non-Intenders
- For an active holiday, with exercise or sport: 8% Intenders, 13% Non-Intenders
- To go somewhere luxurious where I could feel pampered: 10% Intenders, 13% Non-Intenders
- To connect with nature / be outdoors: 12% Intenders, 19% Non-Intenders
- To learn something new: 9% Intenders, 10% Non-Intenders
- For a technology detox: 8% Intenders, 7% Non-Intenders

VB6fii. Which of the following best describe your motivation/s for this trip? Base: City Intenders n=237; Non-City Intenders n=781
Autumn large city Intenders are more likely to seek activities such as ‘visiting cultural attractions’, ‘experiencing the nightlife’ and ‘speciality shopping’, vs. those intending to go to different destination types in autumn.

Figure 54. Activities likely to participate in amongst Autumn Trip Intenders, Percentage, July to September data, UK

- Trying local food and drink: 35%
- Visit cultural attractions: 30%
- Walking, Hiking or Rambling: 22%
- Experience the nightlife: 22%
- Speciality shopping: 21%
- Visit heritage sites: 20%
- Visit family attractions: 17%
- Learn about local history and culture: 17%
- Adventure activities: 15%
- Explore scenic areas by car: 15%
- Nature and wildlife experiences: 13%
- Water sports: 12%
- Visit locations featured in TV, film or literature: 12%
- Health or wellbeing experiences: 11%
- Cycling or mountain biking: 9%
- Creative or artistic pursuits: 8%
- Golf: 6%
- Conservation or volunteering activities: 5%

VB6fii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in…? Base: City Intenders n=237; Non-City Intenders n=781
Those not intending to go to a large city, are mainly concerned that ‘large cities tend to be too expensive’. However, 32% actually ‘don’t tend to take breaks in UK large cities’ at all.

Figure 55. Reasons for not staying in a large city amongst Autumn Trip Intenders, Percentage, July to September data, UK

- Large cities tend to be too expensive: 31%
- I will stay in a large city later in the year: 21%
- I am more worried about catching COVID-19 in a large city: 17%
- There are no large cities in the UK I want to see: 11%
- Other: 8%
- I don’t tend to take holidays or short breaks to UK large cities: 32%

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 Autumn Intenders not planning on staying in a large city. n=781
‘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 Autumn – by life stage, Percentage, July to September data, UK

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>% of Mentions</th>
<th>% of Mentions</th>
<th>% of Mentions</th>
<th>% of Mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Nesters</td>
<td>Large cities tend to be too expensive</td>
<td>41%</td>
<td>Large cities tend to be too expensive</td>
<td>33%</td>
</tr>
<tr>
<td></td>
<td>I will stay in a large city later in the year</td>
<td>27%</td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>26%</td>
<td>I will stay in a large city later in the year</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>13%</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>There are no large cities in the UK I want to see</td>
<td>6%</td>
<td>There are no large cities in the UK I want to see</td>
<td>9%</td>
</tr>
<tr>
<td>Families</td>
<td>Large cities tend to be too expensive</td>
<td>33%</td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>I will stay in a large city later in the year</td>
<td>24%</td>
<td>Large cities tend to be too expensive</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>29%</td>
<td>I will stay in a large city later in the year</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>20%</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>There are no large cities in the UK I want to see</td>
<td>9%</td>
<td>There are no large cities in the UK I want to see</td>
<td>11%</td>
</tr>
<tr>
<td>Older Independents</td>
<td>Large cities tend to be too expensive</td>
<td>27%</td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>I will stay in a large city later in the year</td>
<td>20%</td>
<td>Large cities tend to be too expensive</td>
<td>27%</td>
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<tr>
<td></td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>29%</td>
<td>I will stay in a large city later in the year</td>
<td>20%</td>
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<tr>
<td></td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>12%</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>There are no large cities in the UK I want to see</td>
<td>11%</td>
<td>There are no large cities in the UK I want to see</td>
<td>11%</td>
</tr>
<tr>
<td>Retirees</td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>40%</td>
<td>Large cities tend to be too expensive</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Large cities tend to be too expensive</td>
<td>24%</td>
<td>I will stay in a large city later in the year</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>I don’t tend to take holidays or short breaks to UK large cities</td>
<td>29%</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>I will stay in a large city later in the year</td>
<td>20%</td>
<td>There are no large cities in the UK I want to see</td>
<td>11%</td>
</tr>
</tbody>
</table>

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 Autumn Intenders not confident in taking a overnight UK trip in a large city. Pre-Nesters n=176; Families n=350; Older independents n=164; Retirees n=91
Overall, ‘free cancellation’ is the most important condition required by both large city Intenders and Non-Intenders. Accessibility seems to be more important to large city Autumn 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 Autumn City Intenders and Non-Intenders, Percentage, July to September 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? Base: City Intenders n=237; City Non-Intenders n=781

- Free cancellation
- Contactless check-in and payments
- Transferable bookings to a later date
- A quick and simple refund process
- Discounts or special offer deals
- Plentiful hand sanitizers
- Enhanced cleaning regimes
- A commitment to being eco-friendly/sustainable
- Accessibility (e.g. for wheelchair users or other disabilities)
- Government certification for complying with hygiene and distancing guidelines
- The ability to pay in instalments
- Packaged food only (no open buffets)
- None of these
- Don’t know/not sure
4. Autumn Intenders

Profile by Destination Region
The South West of England is the leading destination for an Autumn overnight trip in the UK (16% stating this), although only marginally ahead of London at 14% and North West at 13%.

Figure 57. Next UK overnight trip destination region for Autumn Intenders, Percentage, July to September data, UK
In autumn, London and West Midlands are more likely than other regions to attract Pre-Nesters, while East Midlands and North East are more likely to attract Families. South West, Yorkshire & Humber and East of England are more likely to attract Older Independents and Retirees.

Figure 58. Life stage of Autumn Intenders by destination region, Percentage, July to September data, UK

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</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>15</td>
<td>28</td>
<td>24</td>
<td>23</td>
<td>8</td>
<td>20</td>
<td>24</td>
<td>11</td>
<td>12</td>
<td>25</td>
<td>12</td>
<td>23</td>
</tr>
<tr>
<td>Older independents</td>
<td>23</td>
<td>29</td>
<td>41</td>
<td>32</td>
<td>37</td>
<td>25</td>
<td>46</td>
<td>52</td>
<td>38</td>
<td>54</td>
<td>31</td>
<td>32</td>
</tr>
<tr>
<td>Families</td>
<td>43</td>
<td>24</td>
<td>25</td>
<td>35</td>
<td>36</td>
<td>20</td>
<td>17</td>
<td>35</td>
<td>11</td>
<td>11</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>20</td>
<td>19</td>
<td>11</td>
<td>11</td>
<td>20</td>
<td>17</td>
<td>23</td>
<td>35</td>
<td>11</td>
<td>13</td>
<td>13</td>
<td>13</td>
</tr>
</tbody>
</table>

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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; East Midlands n=44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59 *Small base size treat with caution.
The North East and West Midlands are more likely to attract AB social grades, while Yorkshire & Humber is more likely to attract C1C2 social grades.

Figure 59. Social grade of Autumn Intenders by destination region, Percentage, July to September 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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n =44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59 *Small base size treat with caution.
In term of visitors flow from other regions in autumn, South West is more likely than other regions to attract those from South East (20%) and London attracts those from Yorkshire & Humber (17%).

Table 6. Region of residence of Autumn Intenders by destination region, Percentage, July to September data, UK, (Read chart vertically)

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</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>91%</td>
<td>50%</td>
<td>74%</td>
<td>96%</td>
<td>86%</td>
<td>96%</td>
<td>84%</td>
<td>75%</td>
<td>95%</td>
<td>91%</td>
<td>91%</td>
<td>94%</td>
</tr>
<tr>
<td>Scotland</td>
<td>5%</td>
<td>46%</td>
<td>2%</td>
<td>1%</td>
<td>11%</td>
<td>1%</td>
<td>8%</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Wales</td>
<td>2%</td>
<td>3%</td>
<td>25%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>South West of England</td>
<td>9%</td>
<td>2%</td>
<td>4%</td>
<td>29%</td>
<td>8%</td>
<td>6%</td>
<td>3%</td>
<td>6%</td>
<td>15%</td>
<td>3%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>London</td>
<td>17%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>22%</td>
<td>25%</td>
<td>7%</td>
<td>12%</td>
<td>21%</td>
<td>11%</td>
<td>16%</td>
<td>6%</td>
</tr>
<tr>
<td>South East of England</td>
<td>14%</td>
<td>5%</td>
<td>7%</td>
<td>20%</td>
<td>8%</td>
<td>36%</td>
<td>8%</td>
<td>15%</td>
<td>3%</td>
<td>16%</td>
<td>13%</td>
<td>8%</td>
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<tr>
<td>North West</td>
<td>10%</td>
<td>7%</td>
<td>23%</td>
<td>3%</td>
<td>8%</td>
<td>4%</td>
<td>25%</td>
<td>13%</td>
<td>7%</td>
<td>9%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>North East</td>
<td>5%</td>
<td>2%</td>
<td>0%</td>
<td>3%</td>
<td>5%</td>
<td>0%</td>
<td>14%</td>
<td>15%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>8%</td>
<td>6%</td>
<td>14%</td>
<td>12%</td>
<td>10%</td>
<td>4%</td>
<td>9%</td>
<td>0%</td>
<td>20%</td>
<td>4%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
<td>9%</td>
<td>1%</td>
<td>11%</td>
<td>6%</td>
<td>7%</td>
<td>12%</td>
<td>32%</td>
<td>8%</td>
<td>6%</td>
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<tr>
<td>East of England</td>
<td>10%</td>
<td>6%</td>
<td>2%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>3%</td>
<td>0%</td>
<td>11%</td>
<td>2%</td>
<td>39%</td>
<td>15%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humber</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
<td>4%</td>
<td>17%</td>
<td>5%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>13%</td>
<td>1%</td>
<td>28%</td>
</tr>
</tbody>
</table>

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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n =44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59
*Small base size treat with caution.
Destination type tends to reflect the destination region being considered. 39% of South West Intenders wish to go to the seaside, 67% of London Intenders are keen on visiting a large city.

Table 7. Destination type of Autumn trip by destination region, Percentage, July to September data, UK

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>26%</td>
<td>21%</td>
<td>43%</td>
<td>39%</td>
<td>10%</td>
<td>25%</td>
<td>25%</td>
<td>9%</td>
<td>18%</td>
<td>13%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>31%</td>
<td>30%</td>
<td>16%</td>
<td>30%</td>
<td>11%</td>
<td>39%</td>
<td>33%</td>
<td>30%</td>
<td>40%</td>
<td>36%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>A city or large town</td>
<td>32%</td>
<td>29%</td>
<td>20%</td>
<td>12%</td>
<td>67%</td>
<td>24%</td>
<td>35%</td>
<td>22%</td>
<td>44%</td>
<td>25%</td>
<td>17%</td>
<td>28%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>20%</td>
<td>26%</td>
<td>25%</td>
<td>28%</td>
<td>14%</td>
<td>26%</td>
<td>12%</td>
<td>22%</td>
<td>7%</td>
<td>12%</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>14%</td>
<td>29%</td>
<td>11%</td>
<td>10%</td>
<td>12%</td>
<td>7%</td>
<td>14%</td>
<td>26%</td>
<td>9%</td>
<td>21%</td>
<td>9%</td>
<td>13%</td>
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</table>

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 Autumn. England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n=44* West Midlands = 33*, East Midlands = 42*, East of England = 50, Yorkshire = 59 *Small base size treat with caution.
There are some differences by destination region in terms of who the Autumn Intenders plan to travel with, although partner is most common top option for most region.

Table 8. Trip taker party composition of Autumn trip by destination region, Percentage, July to September data, UK

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</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>48%</td>
<td>55%</td>
<td>68%</td>
<td>57%</td>
<td>40%</td>
<td>43%</td>
<td>47%</td>
<td>24%</td>
<td>47%</td>
<td>47%</td>
<td>55%</td>
<td>63%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24)</td>
<td>30%</td>
<td>25%</td>
<td>30%</td>
<td>26%</td>
<td>24%</td>
<td>15%</td>
<td>29%</td>
<td>36%</td>
<td>31%</td>
<td>59%</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>19%</td>
<td>11%</td>
<td>5%</td>
<td>15%</td>
<td>25%</td>
<td>21%</td>
<td>22%</td>
<td>17%</td>
<td>19%</td>
<td>6%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Other members of my family</td>
<td>15%</td>
<td>19%</td>
<td>12%</td>
<td>12%</td>
<td>10%</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
<td>6%</td>
<td>12%</td>
<td>10%</td>
<td>9%</td>
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<tr>
<td>Pets</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>With parents of older adults</td>
<td>6%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>7%</td>
<td>17%</td>
<td>1%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>7%</td>
<td>2%</td>
<td>3%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>3%</td>
<td>6%</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
<td>19%</td>
<td>4%</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n=44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59 *Small base size treat with caution.
Hotel/motel/inn is the top accommodation type for Autumn Intenders across most regions, although there is some variation; for example in West Midlands, the main choice is rented house/flat, and for North East, it’s friends or relatives’ home.

Table 9. Accommodation type of Autumn trip by destination region, Percentage, July to September data, UK, Top 9 ranked by all Autumn Intenders

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</tr>
</thead>
<tbody>
<tr>
<td>Hotel / Motel / Inn</td>
<td>40%</td>
<td>42%</td>
<td>55%</td>
<td>32%</td>
<td>65%</td>
<td>35%</td>
<td>41%</td>
<td>25%</td>
<td>45%</td>
<td>36%</td>
<td>28%</td>
<td>33%</td>
</tr>
<tr>
<td>Stayed in a rented house or similar</td>
<td>25%</td>
<td>23%</td>
<td>18%</td>
<td>21%</td>
<td>10%</td>
<td>28%</td>
<td>22%</td>
<td>31%</td>
<td>46%</td>
<td>36%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Friends or relatives’ home</td>
<td>22%</td>
<td>14%</td>
<td>16%</td>
<td>13%</td>
<td>24%</td>
<td>18%</td>
<td>29%</td>
<td>33%</td>
<td>10%</td>
<td>19%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Guest house / B&amp;B</td>
<td>17%</td>
<td>9%</td>
<td>14%</td>
<td>20%</td>
<td>6%</td>
<td>17%</td>
<td>19%</td>
<td>25%</td>
<td>15%</td>
<td>9%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Serviced apartment</td>
<td>16%</td>
<td>8%</td>
<td>1%</td>
<td>8%</td>
<td>13%</td>
<td>18%</td>
<td>13%</td>
<td>26%</td>
<td>31%</td>
<td>16%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Second home / Timeshare</td>
<td>17%</td>
<td>2%</td>
<td>2%</td>
<td>13%</td>
<td>17%</td>
<td>7%</td>
<td>7%</td>
<td>31%</td>
<td>23%</td>
<td>19%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Hostel</td>
<td>15%</td>
<td>8%</td>
<td>6%</td>
<td>11%</td>
<td>14%</td>
<td>12%</td>
<td>10%</td>
<td>33%</td>
<td>14%</td>
<td>15%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Static caravan - not owned by you</td>
<td>12%</td>
<td>13%</td>
<td>14%</td>
<td>9%</td>
<td>5%</td>
<td>9%</td>
<td>12%</td>
<td>18%</td>
<td>11%</td>
<td>8%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>In someone else’s home on a commercial basis – rental of room only</td>
<td>12%</td>
<td>5%</td>
<td>10%</td>
<td>6%</td>
<td>13%</td>
<td>15%</td>
<td>10%</td>
<td>16%</td>
<td>15%</td>
<td>15%</td>
<td>6%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Less common accommodation choices among Autumn Intenders are caravan/camping/glamping, which links with the season.

Table 10. Accommodation type of Autumn trip by destination region, Percentage, July to September data, UK, Bottom 8 ranked by all Autumn Intenders

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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Static caravan - owned by you</td>
<td>12%</td>
<td>2%</td>
<td>5%</td>
<td>6%</td>
<td>12%</td>
<td>15%</td>
<td>7%</td>
<td>18%</td>
<td>7%</td>
<td>9%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Campervan / Motorhome</td>
<td>9%</td>
<td>2%</td>
<td>5%</td>
<td>4%</td>
<td>11%</td>
<td>5%</td>
<td>5%</td>
<td>9%</td>
<td>11%</td>
<td>1%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>In someone else's home on a commercial basis – rental of full property</td>
<td>5%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td>1%</td>
<td>4%</td>
<td>6%</td>
<td>1%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Glamping / Alternative accommodation</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>9%</td>
<td>5%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Touring caravan</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
<td>7%</td>
<td>2%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Farmhouse</td>
<td>3%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>0%</td>
<td>2%</td>
<td>3%</td>
<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Tent</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
<td>1%</td>
<td>2%</td>
<td>9%</td>
<td>3%</td>
<td>7%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>0%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>7%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n =44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59 *Small base size treat with caution.
There is some variation in trip duration by destination. The North East and South West are the most likely regions to be chosen for longer breaks in autumn, while Scotland, North West and Yorkshire & Humber are intended for shorter breaks.

Figure 60. Duration of Autumn trip by destination region, Percentage, July to September data, UK

<table>
<thead>
<tr>
<th>Region</th>
<th>Unsure</th>
<th>Longer break (4+ nights)</th>
<th>Shorter break (1-3 nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>44</td>
<td>53</td>
<td>66</td>
</tr>
<tr>
<td>Scotland</td>
<td>30</td>
<td>49</td>
<td>51</td>
</tr>
<tr>
<td>Wales</td>
<td>49</td>
<td>48</td>
<td>46</td>
</tr>
<tr>
<td>South West of England</td>
<td>53</td>
<td>51</td>
<td>61</td>
</tr>
<tr>
<td>London</td>
<td>43</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>South East of England</td>
<td>45</td>
<td>45</td>
<td>50</td>
</tr>
<tr>
<td>North West</td>
<td>35</td>
<td>45</td>
<td>55</td>
</tr>
<tr>
<td>North East</td>
<td>59</td>
<td>59</td>
<td>59</td>
</tr>
<tr>
<td>West Midlands</td>
<td>41</td>
<td>41</td>
<td>59</td>
</tr>
<tr>
<td>East Midlands</td>
<td>44</td>
<td>44</td>
<td>45</td>
</tr>
<tr>
<td>East of England</td>
<td>45</td>
<td>45</td>
<td>35</td>
</tr>
<tr>
<td>Yorkshire &amp; Humber</td>
<td>39</td>
<td>39</td>
<td>39</td>
</tr>
</tbody>
</table>

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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n=44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59 *Small base size treat with caution.
Wales, South West and Yorkshire & Humber are most likely regions chosen ‘to get away from it all and have a rest’. ‘To connect with nature/be outdoors’ is most likely motivation among those intending to go to South East.

Table 11. Motivations to take a trip for Autumn trip by destination region, Percentage, July to September data, UK, Top 7 ranked by all Autumn Intenders

<table>
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<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Family time or time with my partner</td>
<td>37%</td>
<td>46%</td>
<td>51%</td>
<td>49%</td>
<td>31%</td>
<td>34%</td>
<td>35%</td>
<td>40%</td>
<td>19%</td>
<td>36%</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>To get away from it all and have a rest</td>
<td>37%</td>
<td>40%</td>
<td>56%</td>
<td>52%</td>
<td>36%</td>
<td>35%</td>
<td>38%</td>
<td>9%</td>
<td>26%</td>
<td>18%</td>
<td>46%</td>
<td>51%</td>
</tr>
<tr>
<td>To connect with nature/be outdoors</td>
<td>17%</td>
<td>20%</td>
<td>22%</td>
<td>19%</td>
<td>12%</td>
<td>25%</td>
<td>20%</td>
<td>0%</td>
<td>9%</td>
<td>18%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>To travel somewhere new</td>
<td>17%</td>
<td>18%</td>
<td>24%</td>
<td>23%</td>
<td>12%</td>
<td>11%</td>
<td>13%</td>
<td>7%</td>
<td>24%</td>
<td>13%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>To spend time with friends</td>
<td>19%</td>
<td>13%</td>
<td>9%</td>
<td>11%</td>
<td>21%</td>
<td>17%</td>
<td>20%</td>
<td>9%</td>
<td>25%</td>
<td>22%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>To celebrate a special occasion</td>
<td>13%</td>
<td>17%</td>
<td>11%</td>
<td>6%</td>
<td>18%</td>
<td>10%</td>
<td>15%</td>
<td>10%</td>
<td>22%</td>
<td>14%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>To go somewhere where there was great food</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>8%</td>
</tr>
</tbody>
</table>
South East is also a region more likely chosen by those who seek technology detox. West Midlands Intenders are more likely to seek adventure or challenge.

Table 12. Motivations to take a trip for Autumn trip by destination region, Percentage, July to September data, UK, Bottom 7 ranked by all Autumn Intenders

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</tr>
</thead>
<tbody>
<tr>
<td>To go somewhere luxurious</td>
<td>12%</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>12%</td>
<td>12%</td>
<td>9%</td>
<td>12%</td>
<td>10%</td>
<td>12%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>For adventure or a challenge</td>
<td>11%</td>
<td>7%</td>
<td>11%</td>
<td>5%</td>
<td>8%</td>
<td>12%</td>
<td>10%</td>
<td>6%</td>
<td>22%</td>
<td>9%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>To learn something new</td>
<td>11%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>12%</td>
<td>12%</td>
<td>7%</td>
<td>14%</td>
<td>9%</td>
<td>14%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>For an active holiday</td>
<td>9%</td>
<td>9%</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
<td>12%</td>
<td>11%</td>
<td>5%</td>
<td>11%</td>
<td>12%</td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>Because of a particular interest</td>
<td>11%</td>
<td>9%</td>
<td>4%</td>
<td>5%</td>
<td>18%</td>
<td>3%</td>
<td>11%</td>
<td>13%</td>
<td>13%</td>
<td>15%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>For a technology detox</td>
<td>8%</td>
<td>5%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>12%</td>
<td>4%</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
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</tbody>
</table>

VB6fi. 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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n =44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59
*Small base size treat with caution.
While ‘trying local food and drink’ is most common activity overall, for Autumn London Intenders, ‘visiting cultural attractions’ is the top activity they plan to take part in.

Table 13. Activities likely to participate in for Autumn trip by destination region, Percentage, July to September data, UK, Top 10 ranked by all Autumn Intenders

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</tr>
</thead>
<tbody>
<tr>
<td>Trying local food and drink</td>
<td>35%</td>
<td>41%</td>
<td>53%</td>
<td>41%</td>
<td>28%</td>
<td>32%</td>
<td>31%</td>
<td>32%</td>
<td>41%</td>
<td>28%</td>
<td>28%</td>
<td>49%</td>
</tr>
<tr>
<td>Walking, Hiking or Rambling</td>
<td>31%</td>
<td>46%</td>
<td>51%</td>
<td>38%</td>
<td>17%</td>
<td>42%</td>
<td>35%</td>
<td>20%</td>
<td>29%</td>
<td>44%</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Explore scenic areas by car</td>
<td>18%</td>
<td>42%</td>
<td>32%</td>
<td>29%</td>
<td>7%</td>
<td>11%</td>
<td>16%</td>
<td>21%</td>
<td>12%</td>
<td>17%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Visit heritage sites</td>
<td>19%</td>
<td>22%</td>
<td>34%</td>
<td>26%</td>
<td>17%</td>
<td>29%</td>
<td>11%</td>
<td>13%</td>
<td>5%</td>
<td>22%</td>
<td>14%</td>
<td>27%</td>
</tr>
<tr>
<td>Visit cultural attractions</td>
<td>21%</td>
<td>26%</td>
<td>17%</td>
<td>24%</td>
<td>30%</td>
<td>21%</td>
<td>15%</td>
<td>21%</td>
<td>16%</td>
<td>15%</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>Nature and wildlife experiences</td>
<td>17%</td>
<td>23%</td>
<td>19%</td>
<td>24%</td>
<td>9%</td>
<td>20%</td>
<td>11%</td>
<td>18%</td>
<td>19%</td>
<td>26%</td>
<td>21%</td>
<td>10%</td>
</tr>
<tr>
<td>Visit family attractions</td>
<td>17%</td>
<td>16%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>11%</td>
<td>19%</td>
<td>12%</td>
<td>19%</td>
<td>13%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Learn about local history and culture</td>
<td>15%</td>
<td>16%</td>
<td>28%</td>
<td>21%</td>
<td>12%</td>
<td>26%</td>
<td>6%</td>
<td>16%</td>
<td>8%</td>
<td>19%</td>
<td>7%</td>
<td>13%</td>
</tr>
<tr>
<td>Experience the nightlife</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>22%</td>
<td>13%</td>
<td>16%</td>
<td>11%</td>
<td>21%</td>
<td>15%</td>
<td>12%</td>
<td>24%</td>
</tr>
<tr>
<td>Adventure activities</td>
<td>13%</td>
<td>9%</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>11%</td>
<td>17%</td>
<td>6%</td>
<td>13%</td>
<td>15%</td>
<td>19%</td>
<td>11%</td>
</tr>
</tbody>
</table>

VB6fi.ii. VB6fi.iii. 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 Autumn England n=699; Scotland n=102; Wales n=70; South West of England n=103; London n=105; South East of England n=61; North West n=95; North East n =44* West Midlands = 33*, East Midlands = 42*, East of England n=50, Yorkshire = 59
*Small base size treat with caution.
Health or wellbeing experience is intended mostly by those planning a trip to Yorkshire & Humber and West Midlands. Conservation activities by those intending a trip to East Midlands.

Table 14. Activities likely to participate in for Autumn trip by destination region, Percentage, July to September data, UK

<table>
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</thead>
<tbody>
<tr>
<td>Speciality shopping</td>
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<td>10%</td>
<td>14%</td>
<td>7%</td>
<td>23%</td>
<td>7%</td>
<td>11%</td>
<td>13%</td>
<td>10%</td>
<td>16%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Health or wellbeing experiences</td>
<td>12%</td>
<td>5%</td>
<td>1%</td>
<td>8%</td>
<td>9%</td>
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<td>10%</td>
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<td>15%</td>
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<tr>
<td>Water sports</td>
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<td>4%</td>
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<td>17%</td>
<td>13%</td>
<td>15%</td>
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<td>11%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Visit locations featured in TV, film or literature</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>10%</td>
<td>13%</td>
<td>2%</td>
<td>7%</td>
<td>7%</td>
<td>12%</td>
<td>3%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Cycling or mountain biking</td>
<td>9%</td>
<td>15%</td>
<td>5%</td>
<td>12%</td>
<td>12%</td>
<td>0%</td>
<td>9%</td>
<td>2%</td>
<td>3%</td>
<td>10%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Creative or artistic pursuits</td>
<td>7%</td>
<td>7%</td>
<td>2%</td>
<td>3%</td>
<td>7%</td>
<td>9%</td>
<td>2%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Conservation or volunteering activities</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>10%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Golf</td>
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<td>0%</td>
<td>2%</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>8%</td>
<td>0%</td>
<td>3%</td>
<td>3%</td>
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<td>3%</td>
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<tr>
<td>None of these</td>
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<td>1%</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>8%</td>
<td>4%</td>
<td>4%</td>
<td>0%</td>
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<td>2%</td>
<td>5%</td>
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</tbody>
</table>
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.
• 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.