Domestic Sentiment Tracker: Profiling Report

Published: 6th October 2022

Fieldwork Period: July to September 2022

UK Results

Content

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

Definitions used within this report (3)

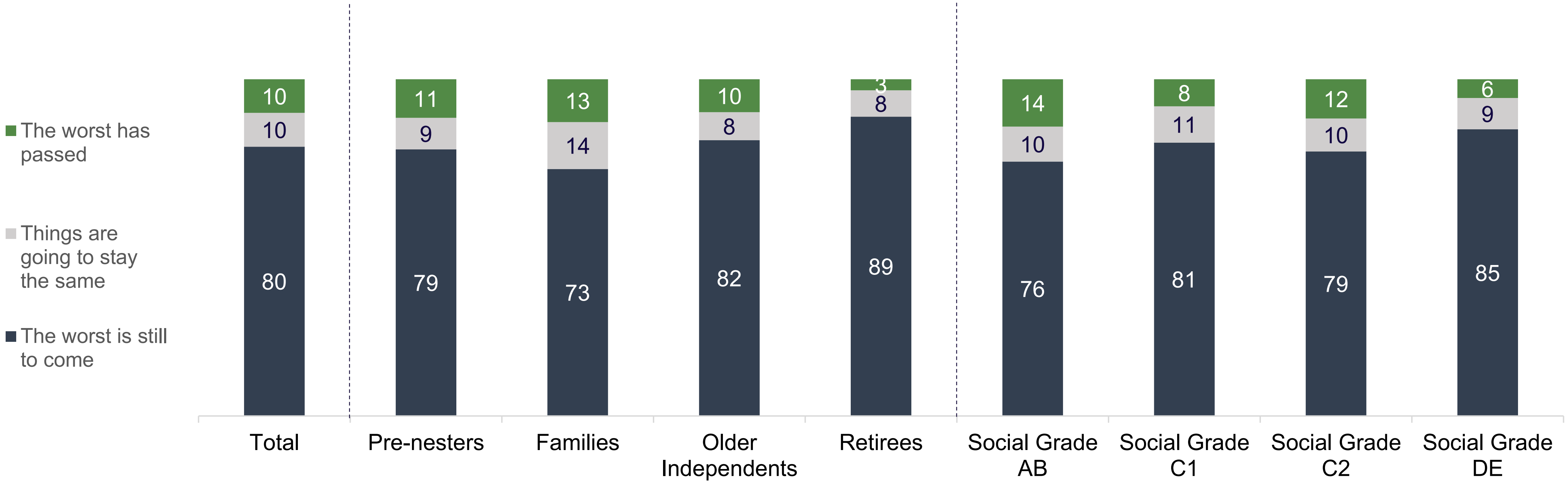
To deliver clearer profiles, we also segment by life stage. Life stages are preferable to ‘age’ as they better describe someone’s life situation. For the purpose of this report, we have used the following:

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

1. The Rising Cost of Living and Covid

Overall 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.

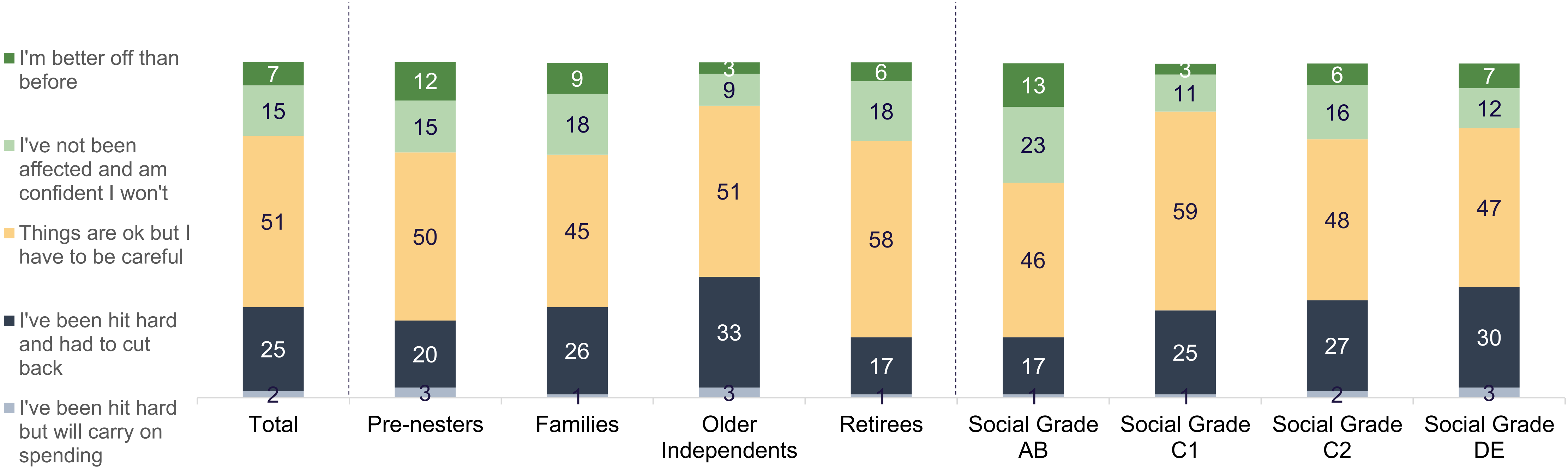
Figure 1. Perception of the situation with regards to the cost of living crisis by life stage, September data, Percentage, UK



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

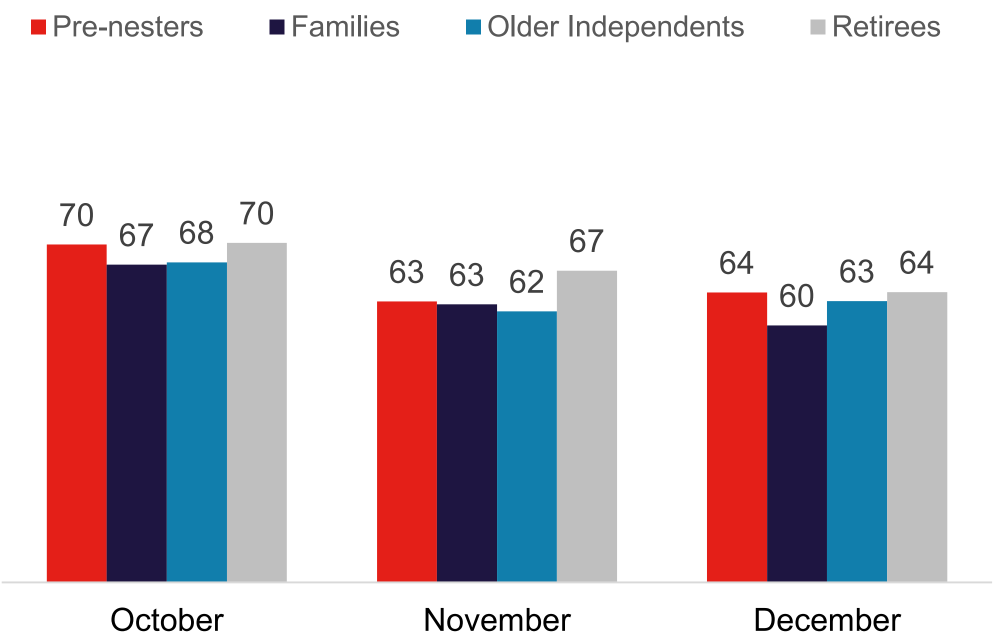
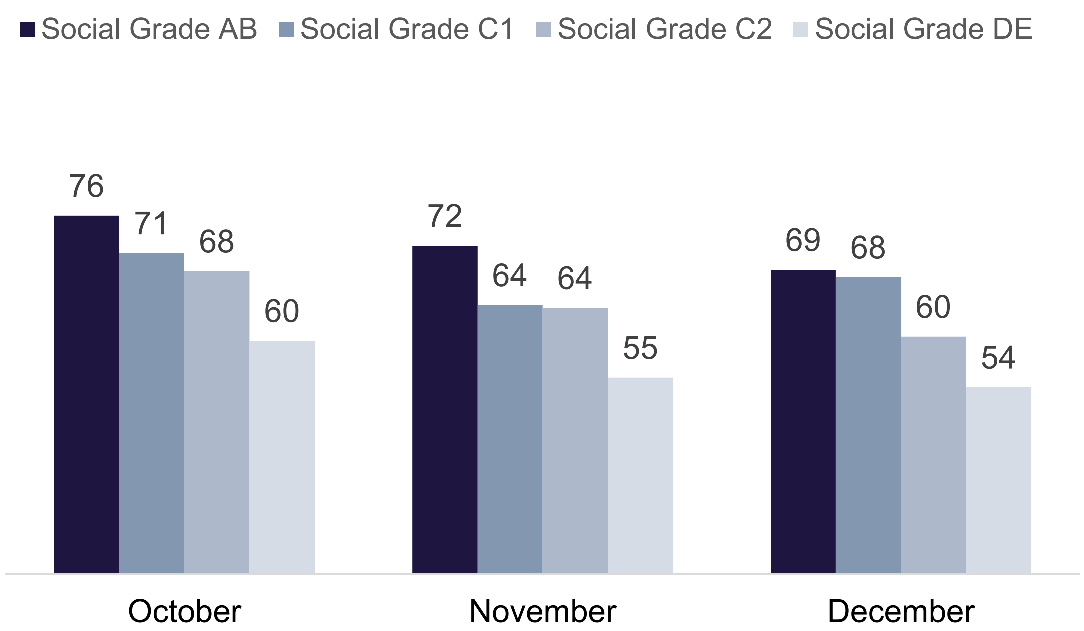


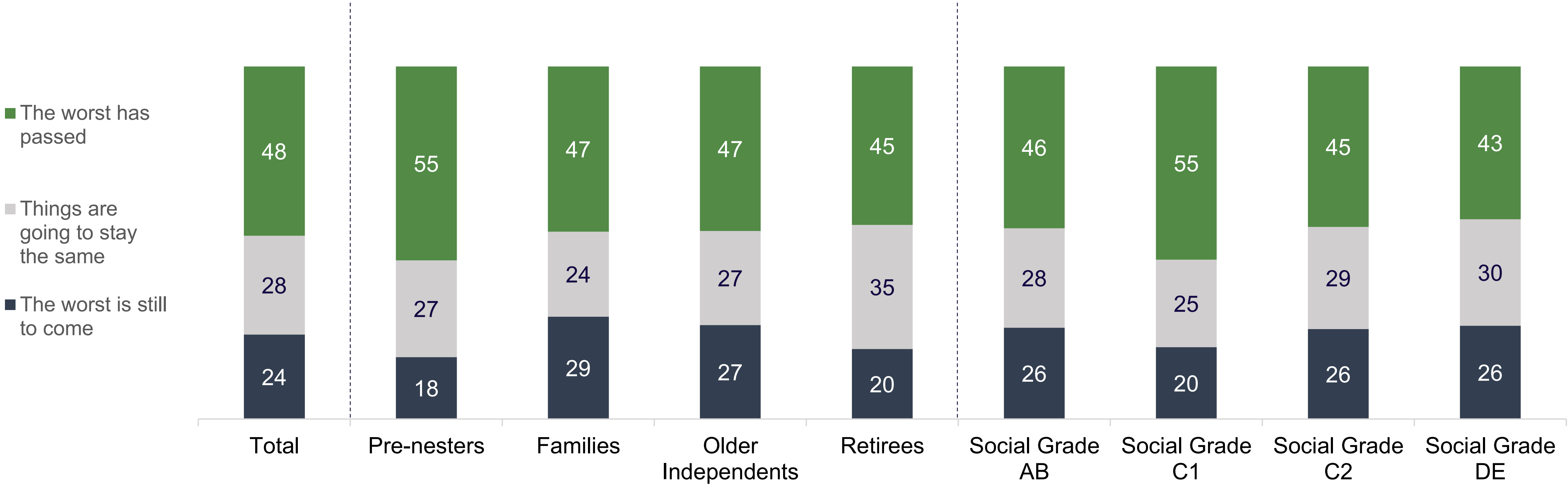
Figure 4. Confidence in ability to take an overnight domestic trip by social grade, Percentage, September data, UK and Scotland



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

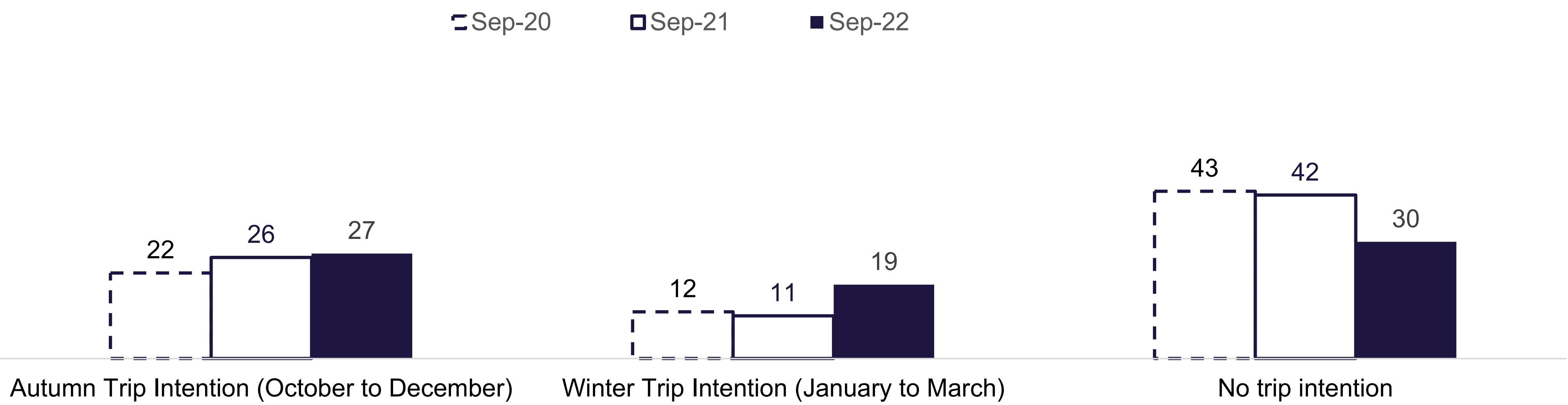


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
Base: Total. n=1,758. Pre-Nesters n=383; Families n=682; Older Independents n=442; Retirees n=251; Social Grades AB n=514; C1 n=257; C2 n=375; DE n=612

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.

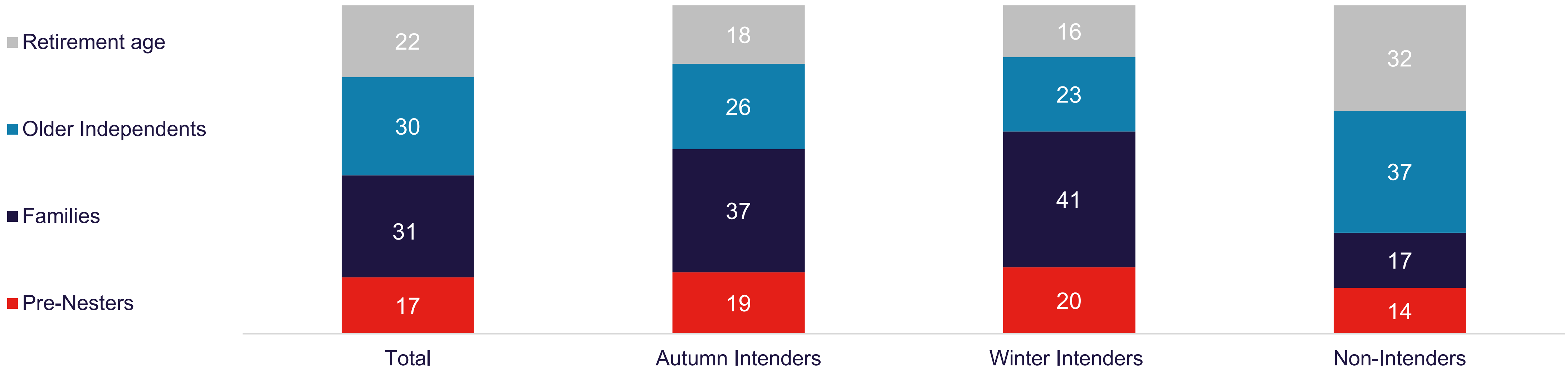
Figure 6. Proportion anticipating going on any overnight UK trips, Percentage, September 2022 data, UK



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.

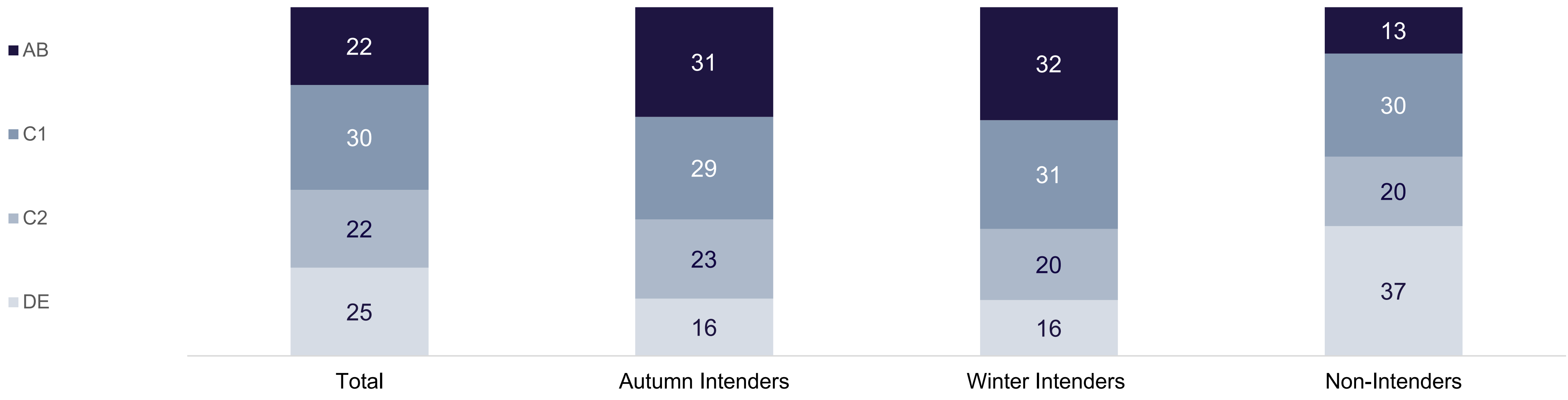
Figure 7. Life stage by UK overnight trip intention, Percentage, July to September data, UK



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.

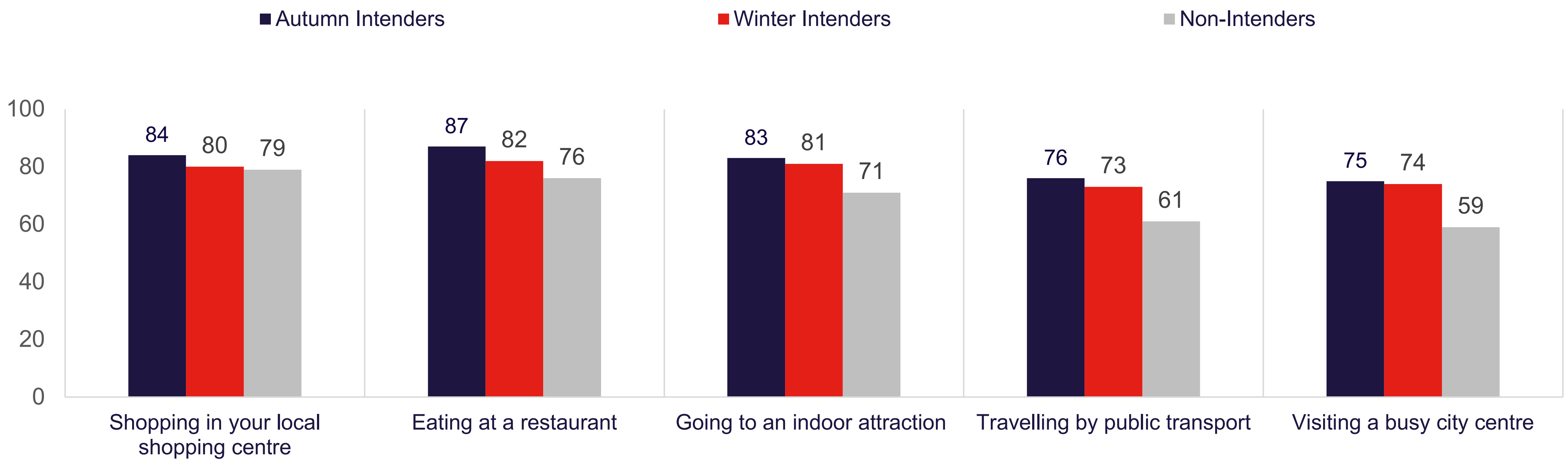
Figure 8. Social grade by UK overnight trip intention, Percentage, July to September data, UK



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.

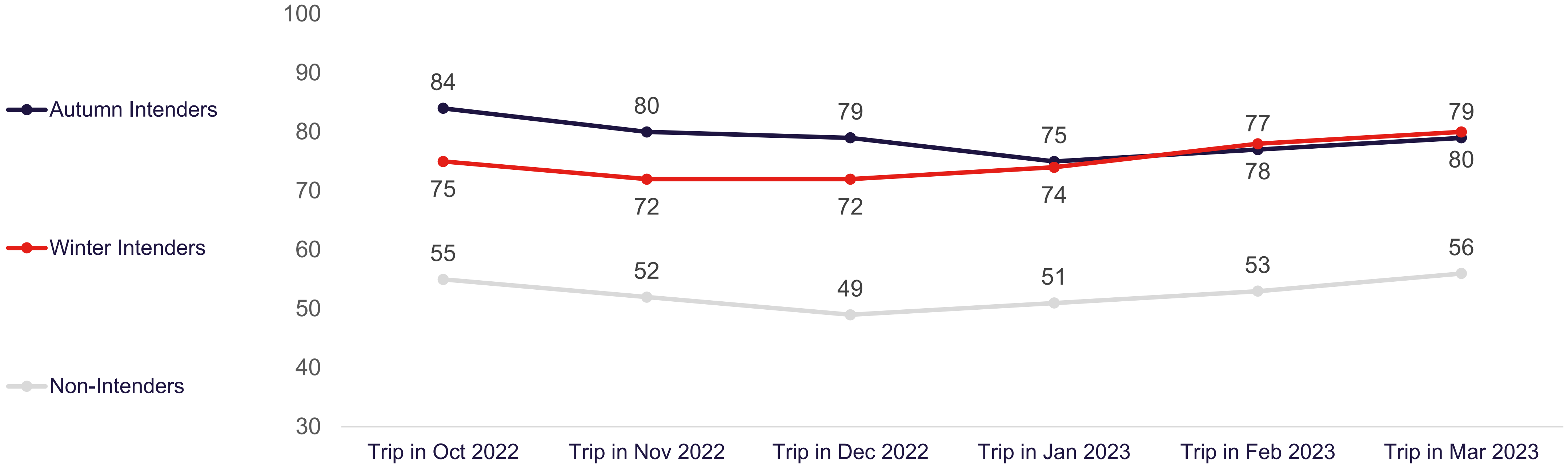
Figure 9. Level of comfort conducting a range of activities, NET very and fairly comfortable, Percentage, July to September data, UK



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450

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.

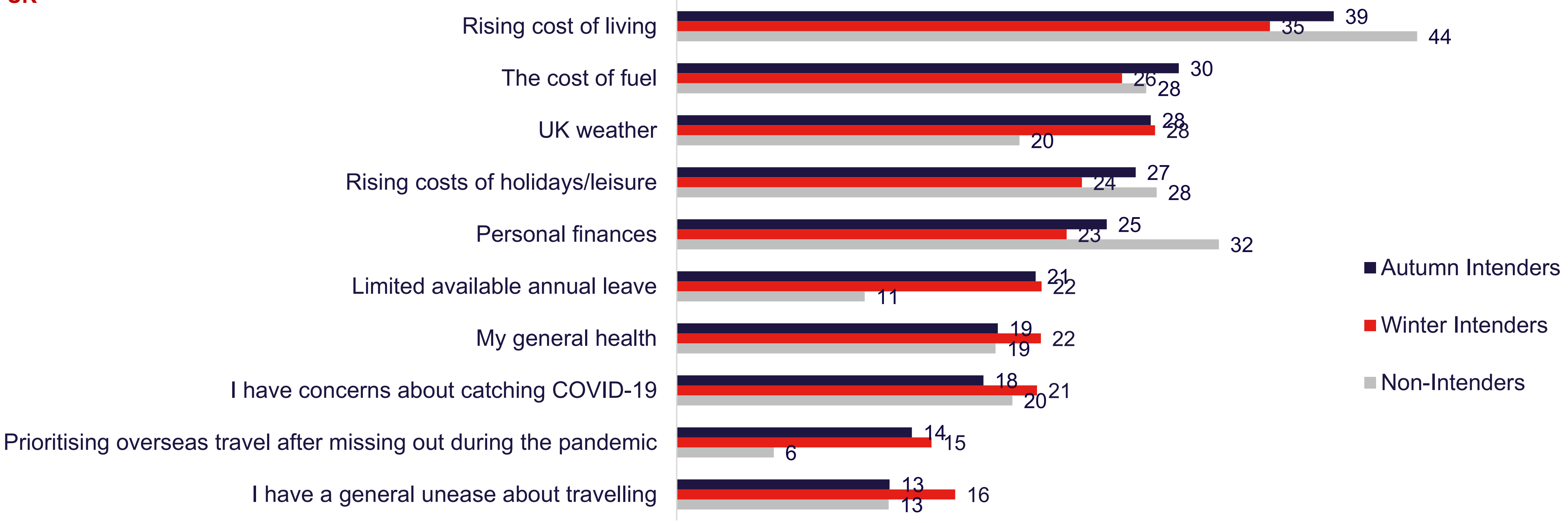
Figure 10. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, July to September data, UK



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.

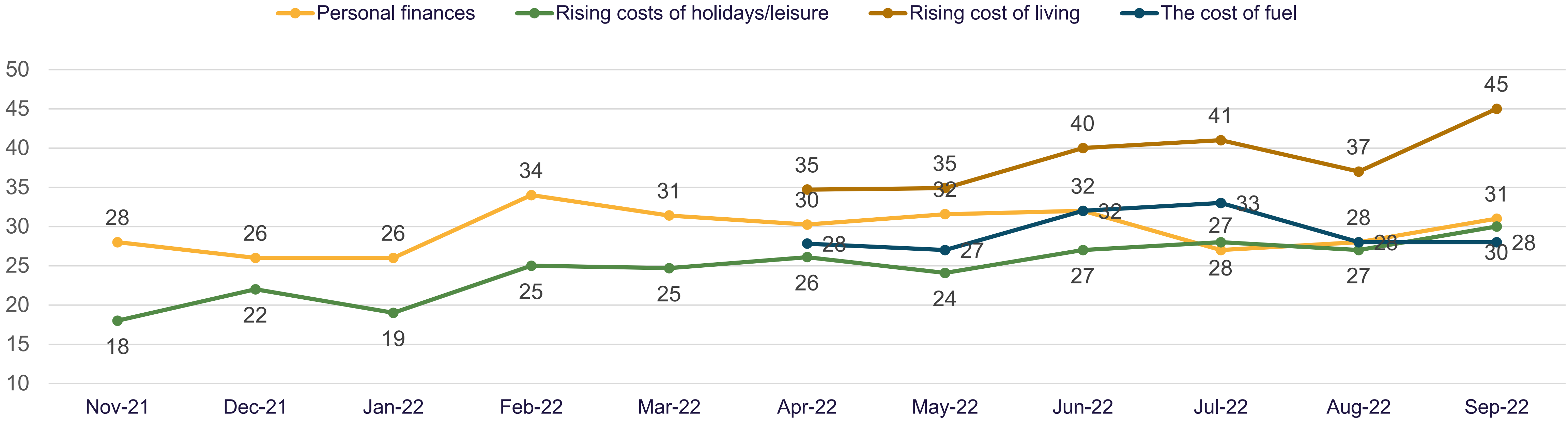
Figure 11. Top 10 Potential barriers for taking an overnight UK trip in next six months, Percentage Top 10, July to September data, UK



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

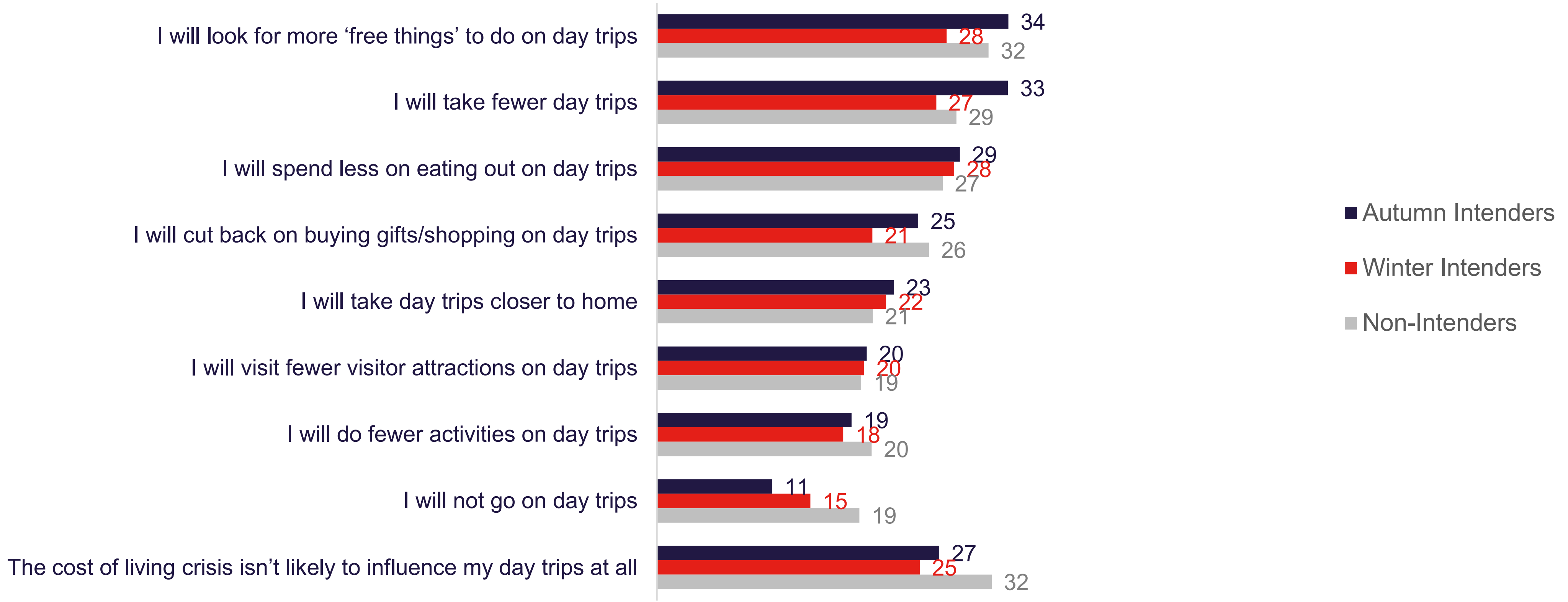
The cost of living crisis is most likely to influence Autumn and Winter Intenders' behaviour through 'choosing cheaper accommodation', 'spending less on eating out' and 'looking for more free things to do'.

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

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: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
Note: Multiple choice question. Totals may exceed 100%.

Focusing on day trips, the ‘cost of living crisis’ is most likely to encourage trip intenders to ‘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



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: Autumn Intenders n=1,492; Winter Intenders n=1,031; Non-Intenders n=1,450
Note: Multiple choice question. Totals may exceed 100%.

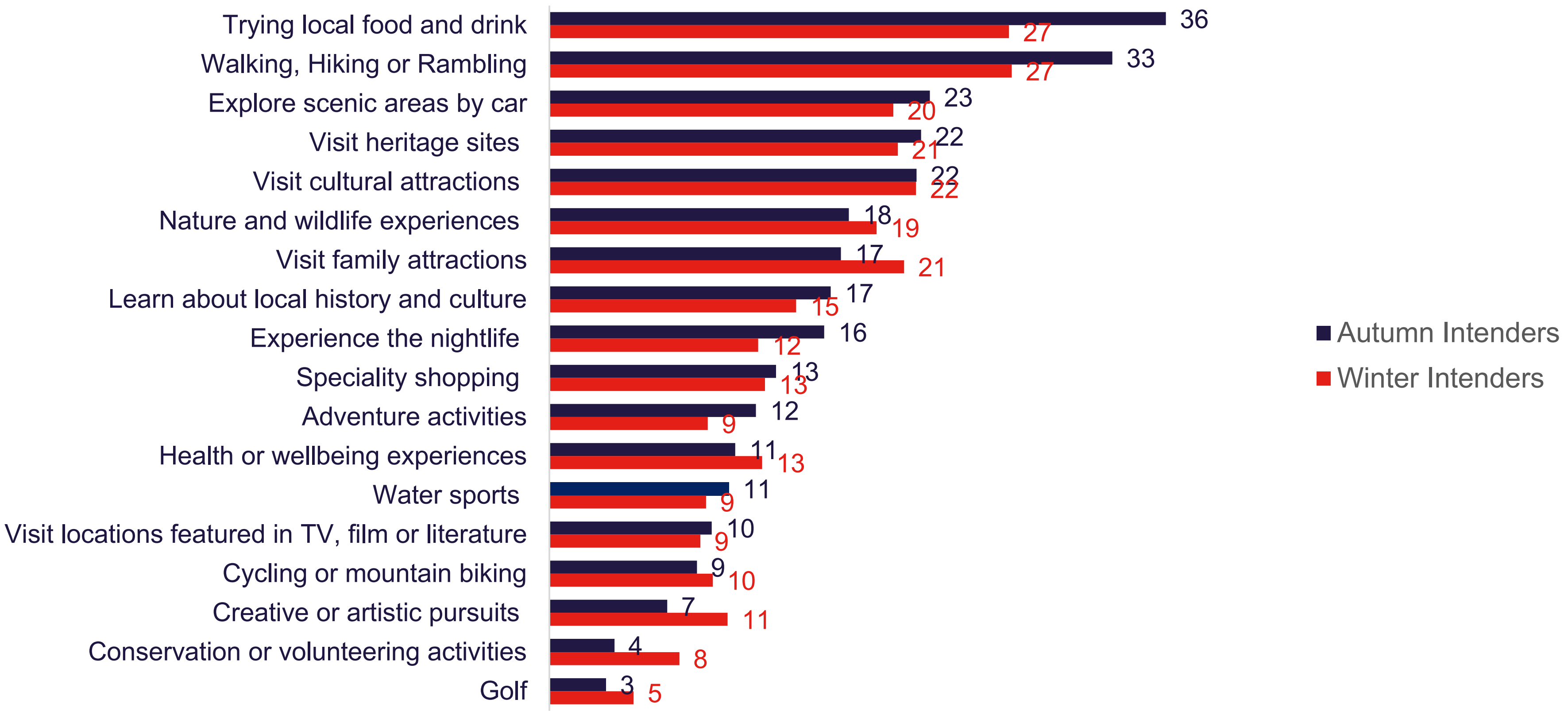
Intenders from both periods share the same top two reasons for going on their next overnight trip – ‘family time or time with my partner’ and ‘to get away from it all and have a rest’.

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

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.

Figure 16. Activities for UK holidays and short breaks, Percentage, July to September data, UK, Full list



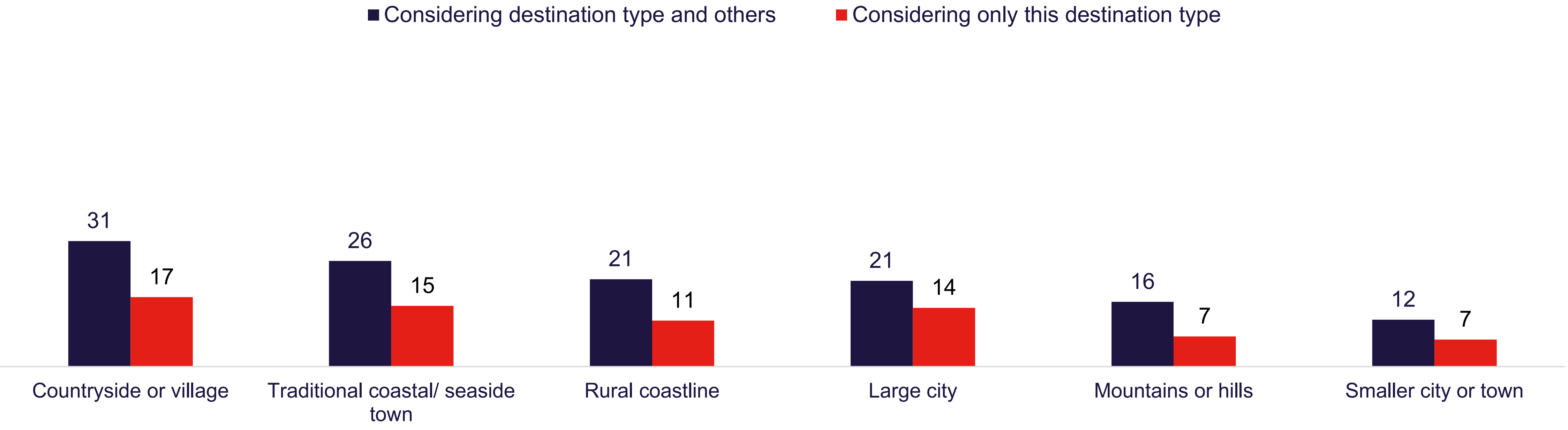
Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
Base: Autumn Intenders n=1,492; Winter Intenders n=1,031
Note: Multiple choice question. Totals may exceed 100%.

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



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

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)

Column %	Traditional coastal/ seaside town	Countryside or village	Rural coastline	Smaller city or town	Large city	Mountains or hills
Traditional coastal/ seaside town		21%	25%	10%	12%	22%
Countryside or village	25%		31%	22%	11%	35%
Rural coastline	21%	22%		9%	8%	26%
Smaller city or town	5%	8%	5%		10%	7%
Large city	10%	8%	8%	18%		11%
Mountains or hills	14%	18%	19%	10%	8%	

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

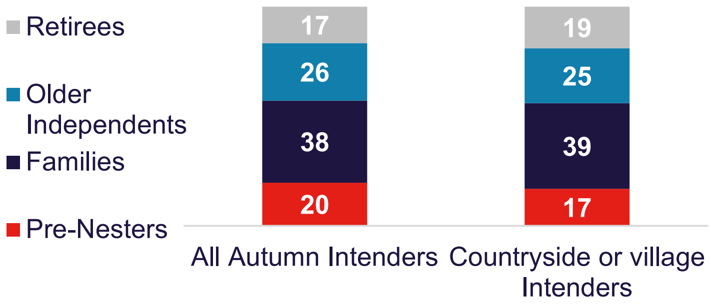


Figure 19. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

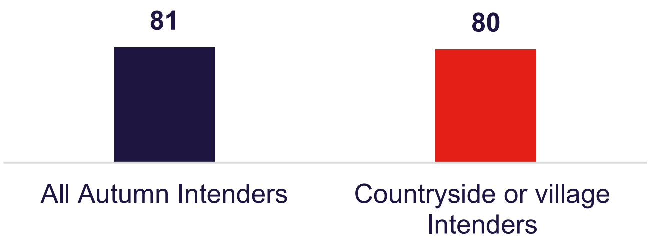


Figure 20. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

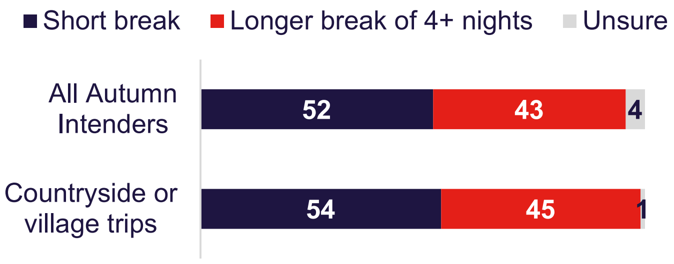


Figure 21. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

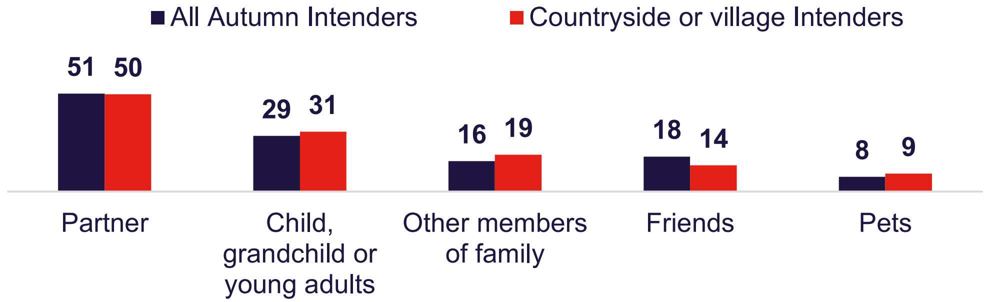
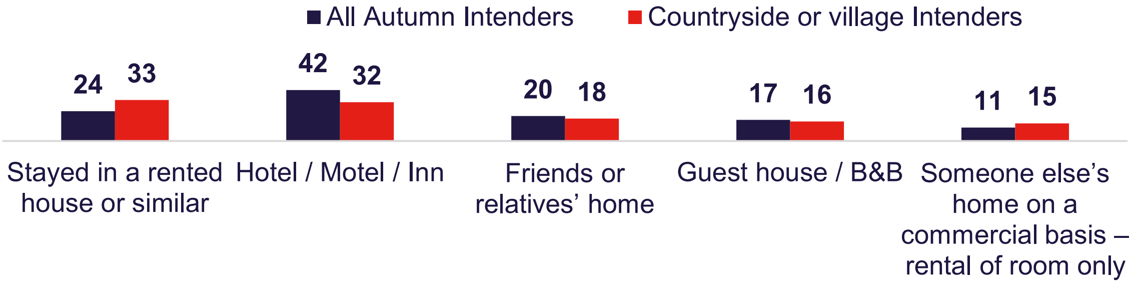


Figure 22. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



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 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

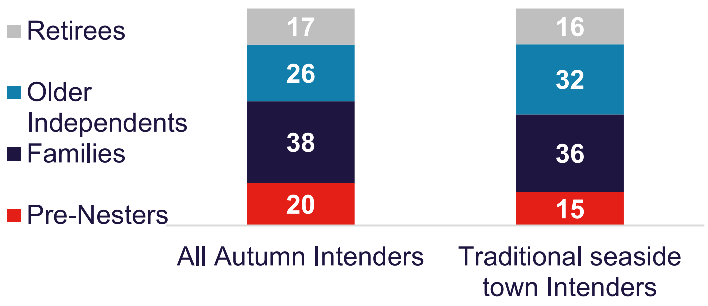


Figure 24. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

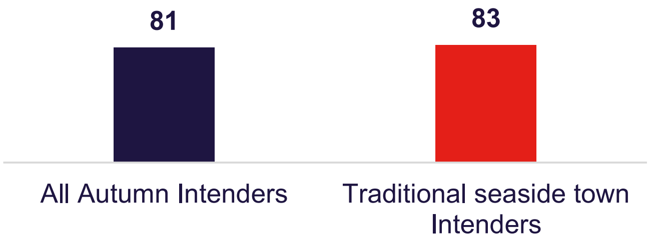


Figure 25. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

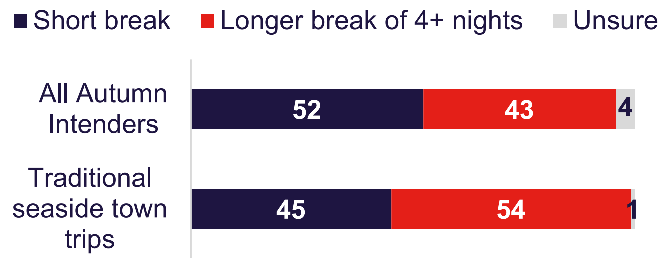


Figure 26. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

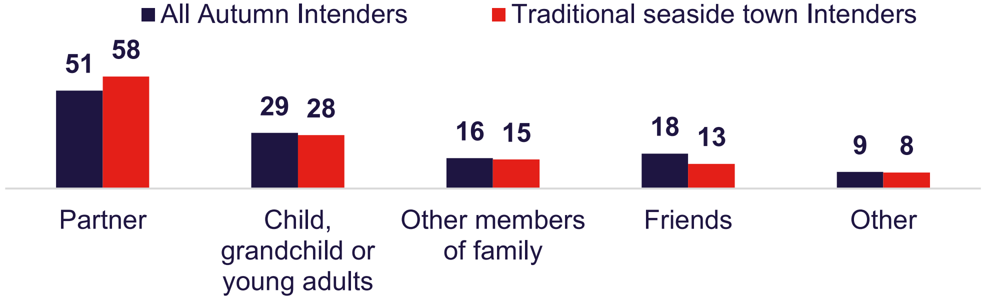
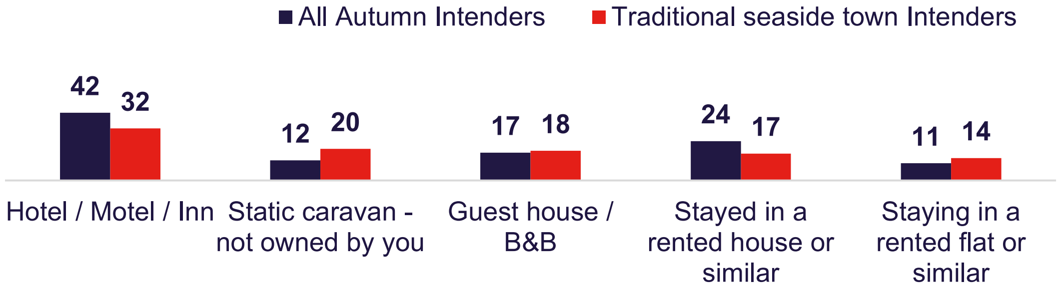


Figure 27. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



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

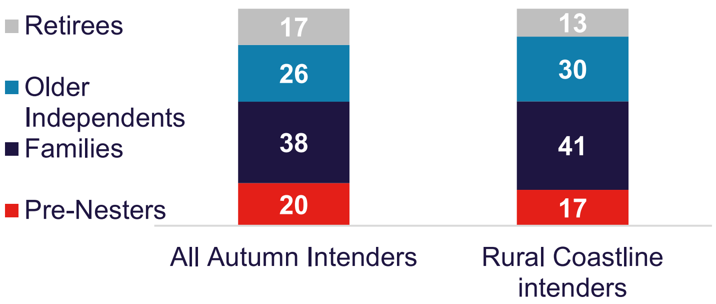


Figure 29. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

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

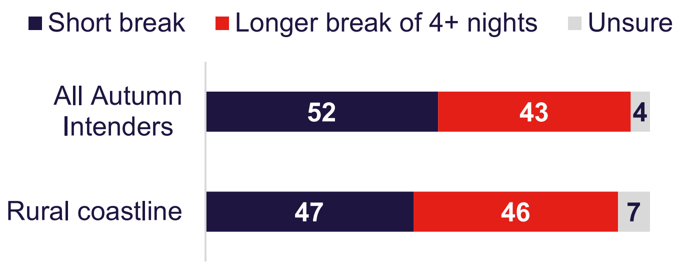


Figure 31. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

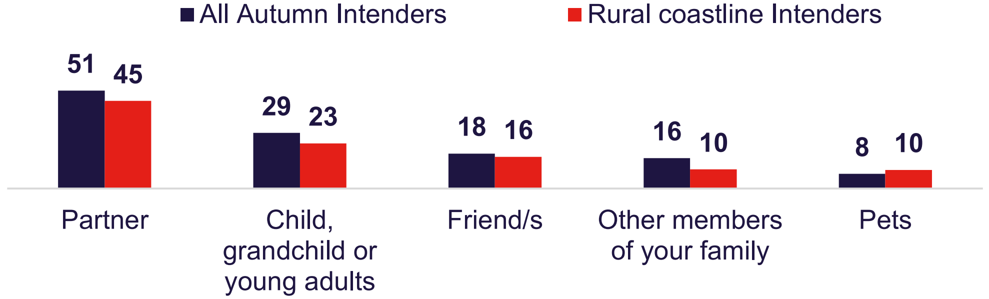
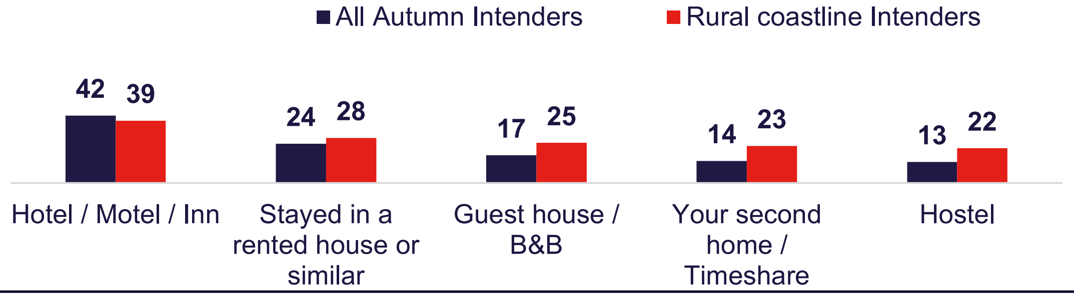


Figure 32. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



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 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.

Figure 33. Life Stage of Autumn Intenders, Percentage, July to September data, UK

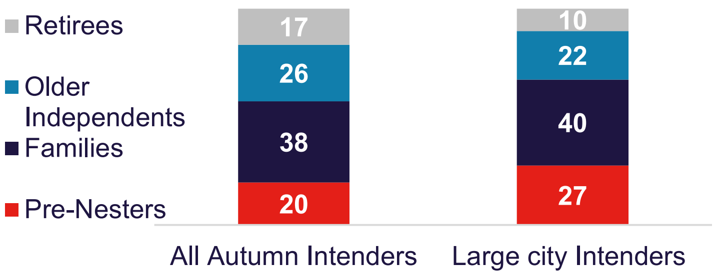


Figure 34. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

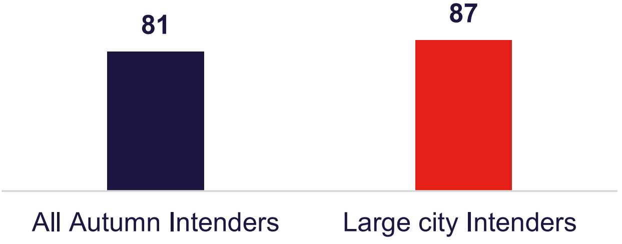


Figure 35. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

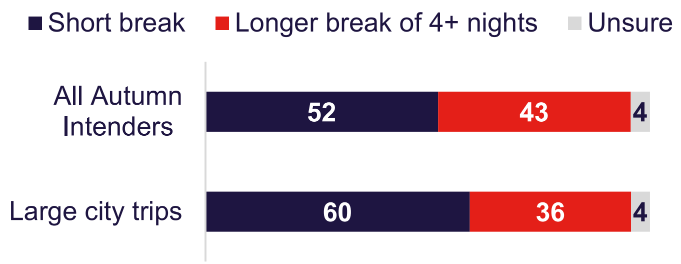


Figure 36. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

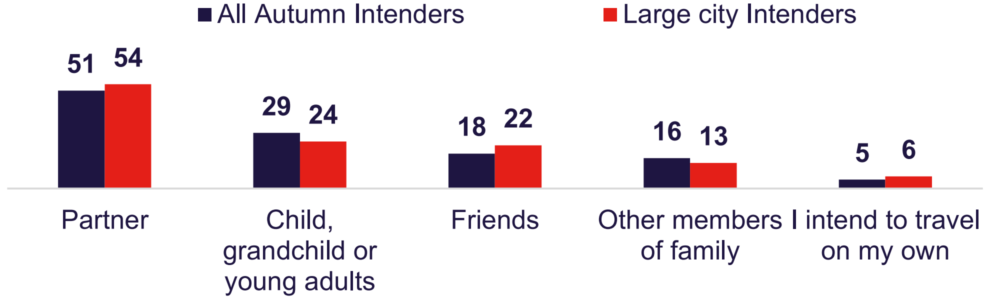
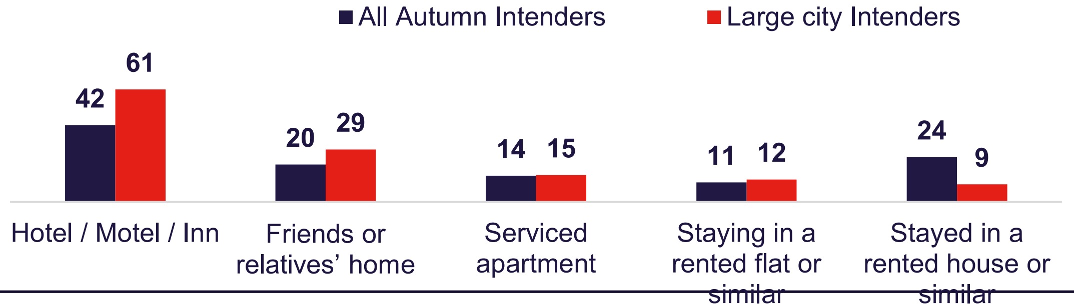


Figure 37. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



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 Large city Intenders n=237 ; Base for all other charts: Only Large city Intenders n=169.

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

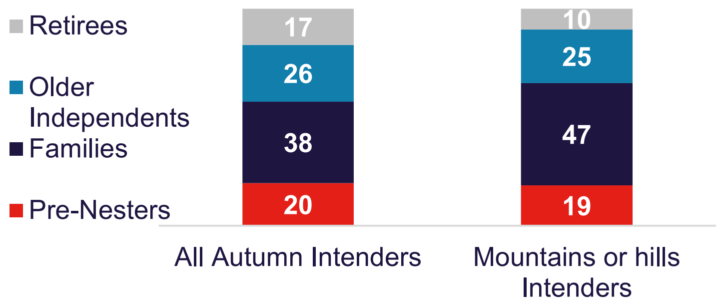


Figure 39. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

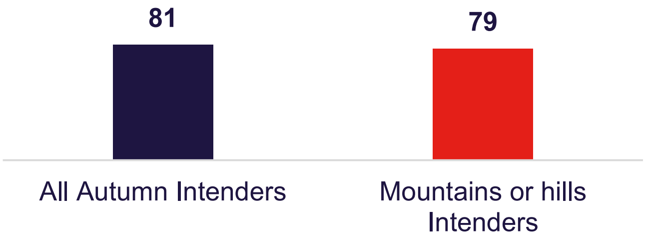


Figure 40. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

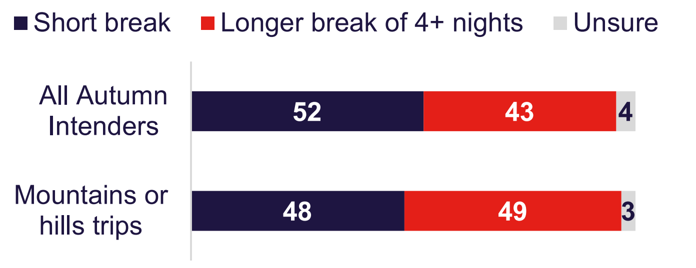


Figure 41. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

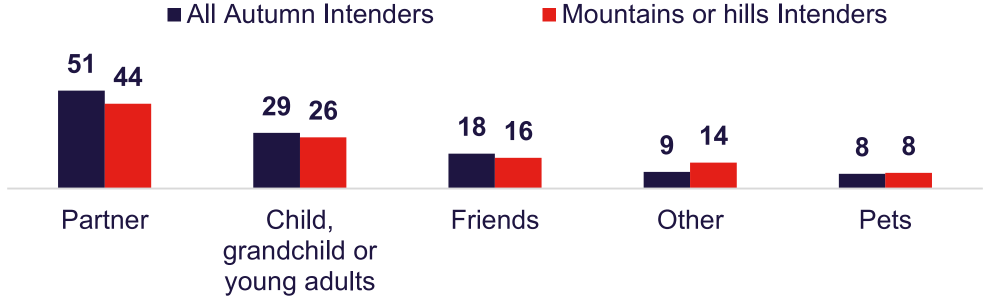
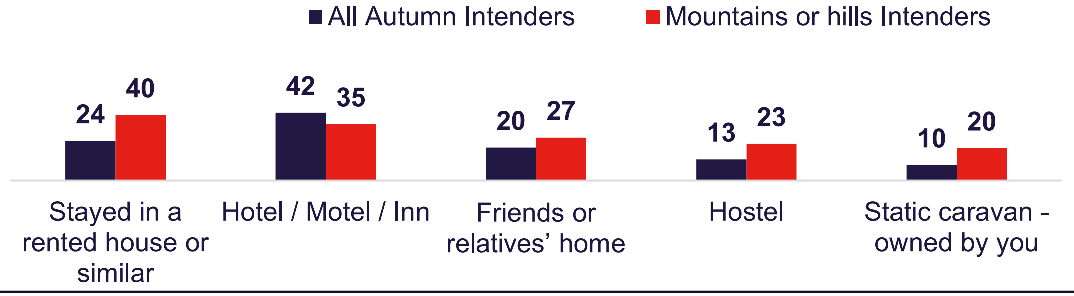


Figure 42. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



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

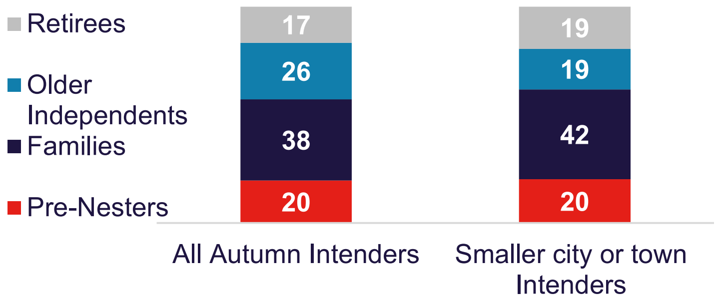


Figure 44. Average comfort level conducting everyday activities, NET very and fairly comfortable, July to September data, UK

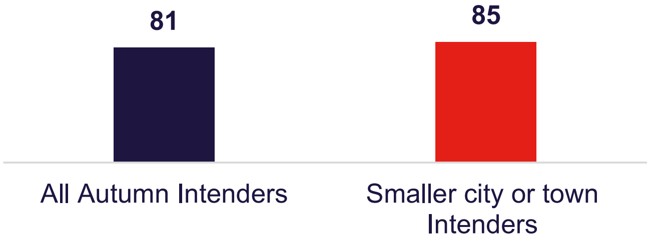


Figure 45. Trip Duration of Intended Autumn Trip, Percentage, July to September data, UK

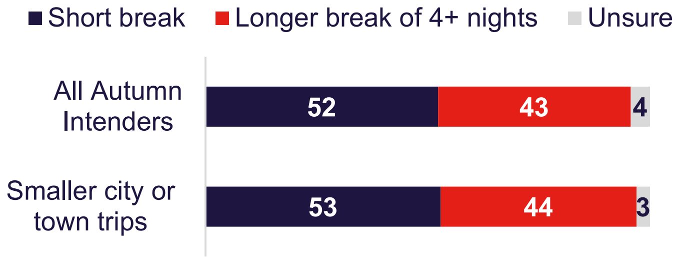


Figure 46. Trip Taker Party Make-up of Intended Autumn Trip, Top 5, Percentage, July to September data, UK

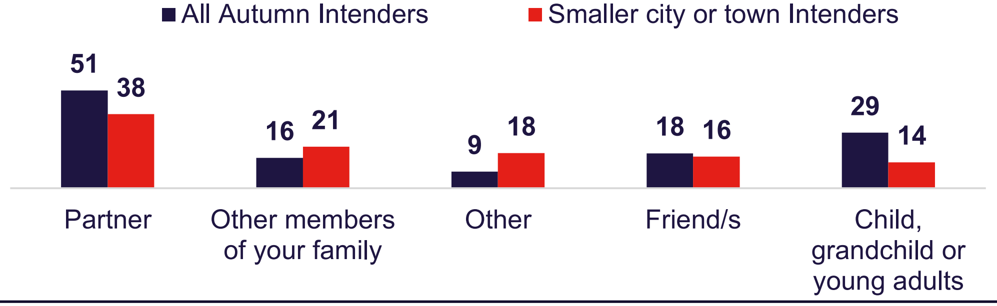
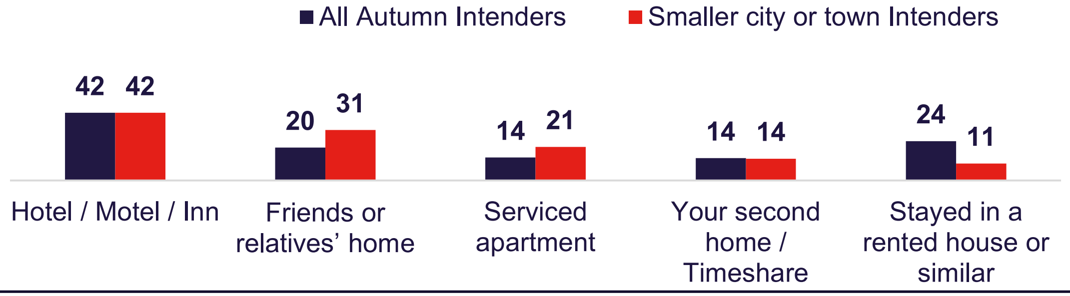


Figure 47. Accommodation Type of Intended Autumn Trip, Top 5, Percentage, July to September data, UK



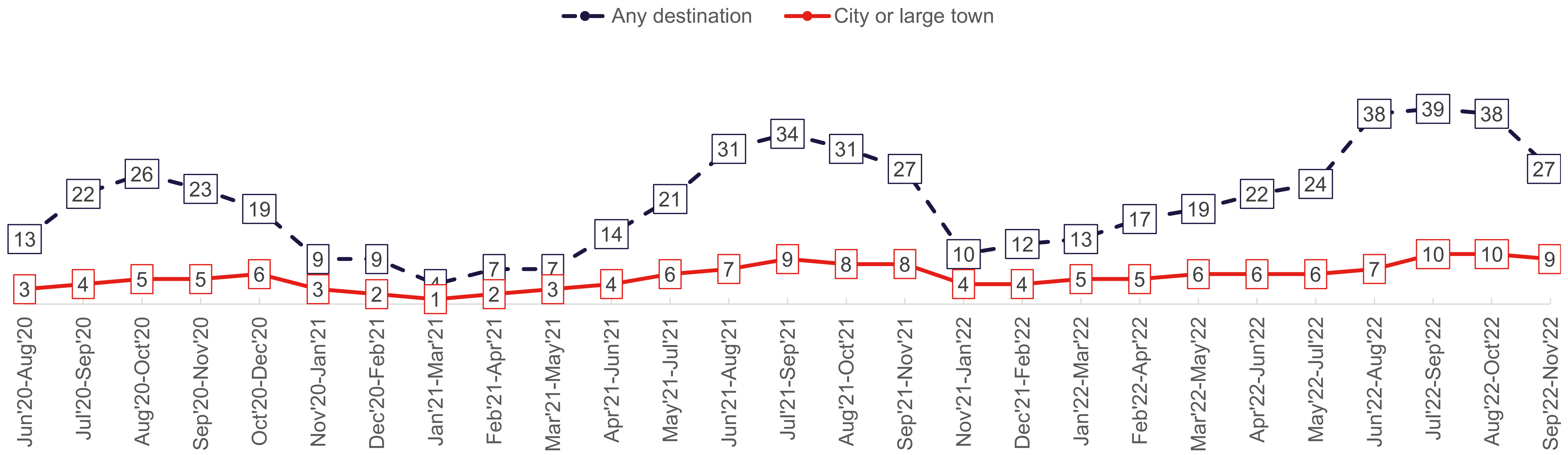
Base: All respondents planning on taking a holiday or short break in the UK; Autumn Intenders n=1,018; Base for life stage and comfort level chart: All Smaller city or town Intenders n=112 ; Base for all other charts: Only Smaller city or town Intenders n=58.

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.

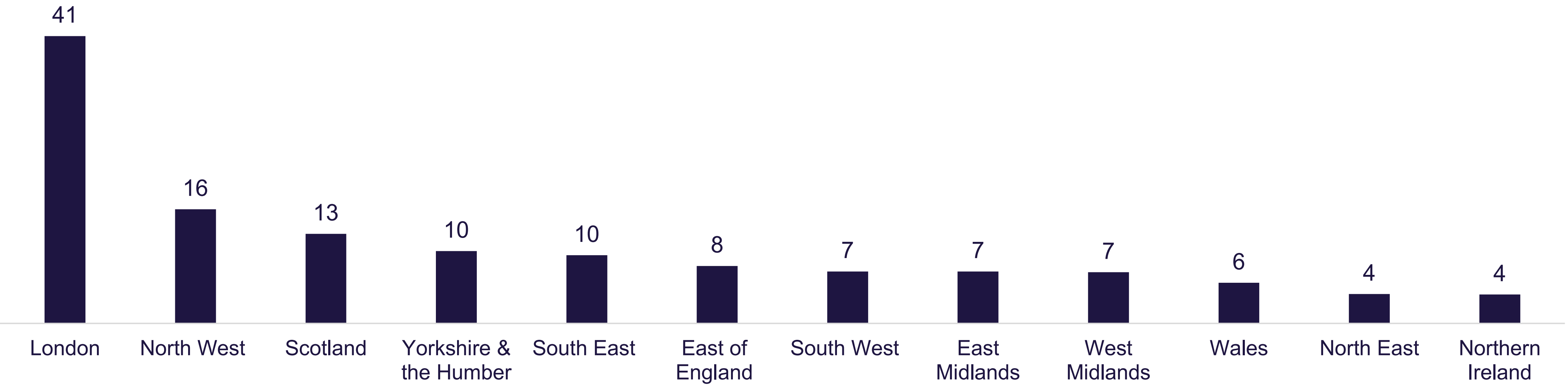
Figure 48. Incidence of UK overnight trips intended within next 3 months, Percentage wave-on-wave, UK



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



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; Large city Intenders n=237
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

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 <u>Autumn Intenders</u>, Percentage, July to September data, UK

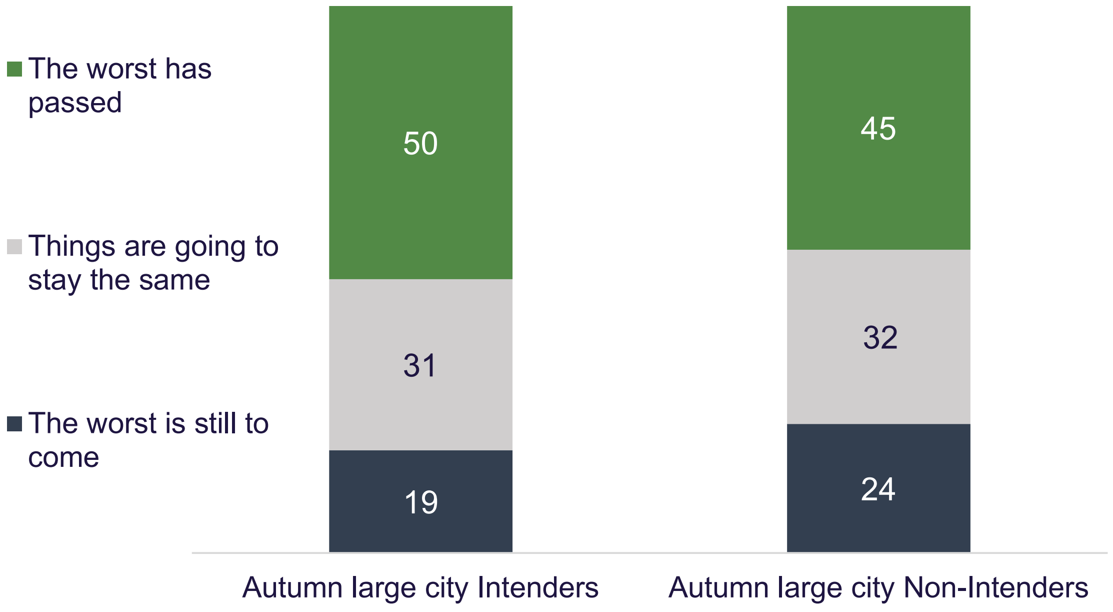
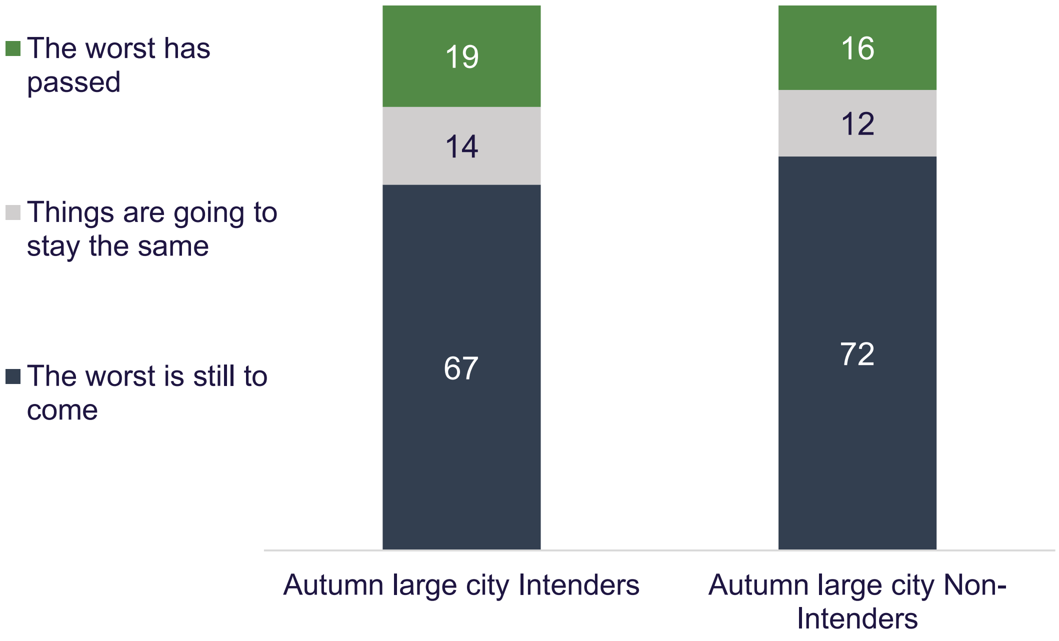


Figure 51. Perception of the Cost of Living crisis amongst <u>Autumn Intenders</u>, Percentage, July to September data, UK



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

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

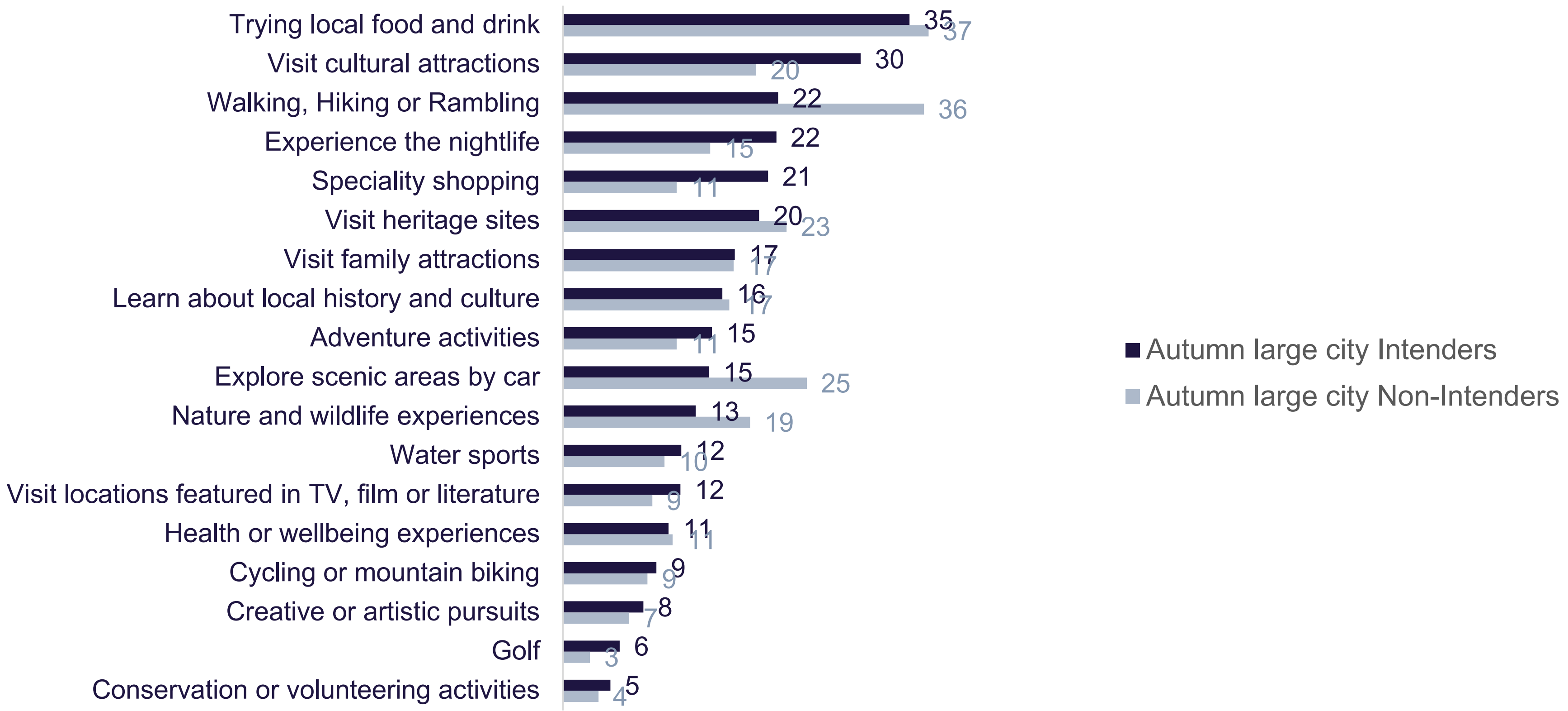
Autumn large city Intenders' motivation for the trip is more likely to be 'to spend time with friends' and 'to celebrate a special occasion', vs. those intending to go to different destination types in autumn.

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

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.

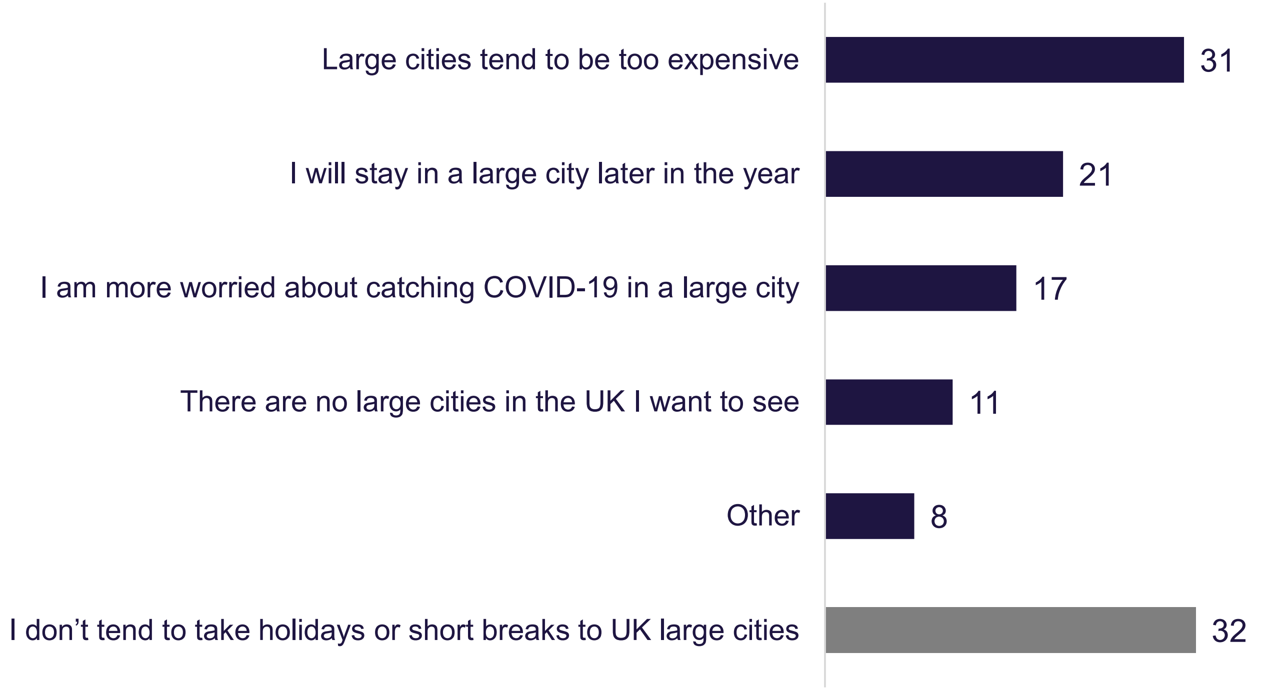
Figure 54. Activities likely to participate in amongst Autumn Trip Intenders, Percentage, July to September data, UK



VB6fiii. 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



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

Pre-Nesters	% of mentions
Large cities tend to be too expensive	41%
I will stay in a large city later in the year	27%
I don’t tend to take holidays or short breaks to UK large cities	26%
I am more worried about catching COVID-19 in a large city	13%
There are no large cities in the UK I want to see	6%

Families	% of mentions
Large cities tend to be too expensive	33%
I don’t tend to take holidays or short breaks to UK large cities	29%
I will stay in a large city later in the year	24%
I am more worried about catching COVID-19 in a large city	20%
There are no large cities in the UK I want to see	9%

Older Independents	% of mentions
I don’t tend to take holidays or short breaks to UK large cities	34%
Large cities tend to be too expensive	27%
I will stay in a large city later in the year	20%
I am more worried about catching COVID-19 in a large city	12%
There are no large cities in the UK I want to see	11%

Retirees	% of mentions
I don’t tend to take holidays or short breaks to UK large cities	40%
Large cities tend to be too expensive	24%
There are no large cities in the UK I want to see	20%
I am more worried about catching COVID-19 in a large city	20%
I will stay in a large city later in the year	9%

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

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

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; Autumn Intenders n=1,018
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

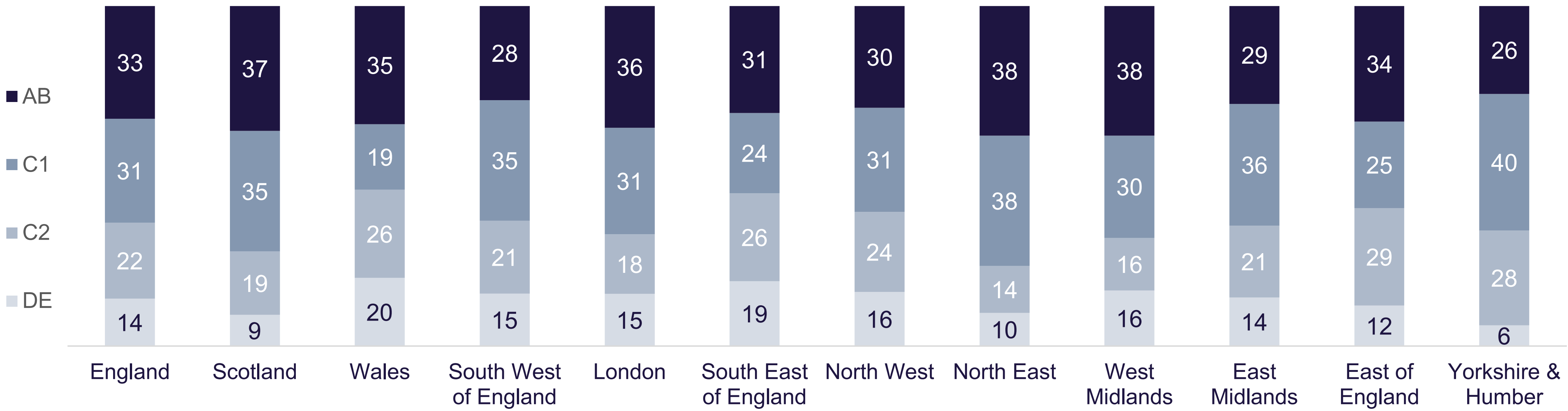
In autumn, London and West Midlands are more likely than other regions to attract Pre-Nesters, while East Midlands and North East are more likely to attract Families. South West, Yorkshire & Humber and East of England are more likely to attract Older Independents and Retirees.

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

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; 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.

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)

Region of residence [down]	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
England	91%	50%	74%	96%	86%	96%	84%	75%	95%	91%	91%	94%
Scotland	5%	46%	2%	1%	11%	1%	8%	6%	3%	2%	6%	5%
Wales	2%	3%	25%	3%	3%	1%	4%	4%	3%	4%	0%	1%
South West of England	9%	2%	4%	29%	8%	6%	3%	6%	15%	3%	2%	6%
London	17%	10%	11%	11%	22%	25%	7%	12%	21%	11%	16%	6%
South East of England	14%	5%	7%	20%	8%	36%	8%	15%	3%	16%	13%	8%
North West	10%	7%	23%	3%	8%	4%	25%	13%	7%	9%	4%	11%
North East	5%	2%	0%	3%	5%	0%	14%	15%	0%	0%	2%	6%
West Midlands	8%	6%	14%	12%	10%	4%	9%	0%	20%	4%	8%	8%
East Midlands	9%	5%	3%	9%	1%	11%	6%	7%	12%	32%	8%	6%
East of England	10%	6%	2%	6%	8%	5%	3%	0%	11%	2%	39%	15%
Yorkshire & Humber	10%	7%	9%	4%	17%	5%	9%	7%	6%	13%	1%	28%

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

Destination type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Traditional coastal/seaside town	26%	21%	43%	39%	10%	25%	25%	9%	18%	13%	36%	25%
Countryside or village	31%	30%	16%	30%	11%	39%	33%	30%	40%	36%	21%	32%
A city or large town	32%	29%	20%	12%	67%	24%	35%	22%	44%	25%	17%	28%
Rural coastline	20%	26%	25%	28%	14%	26%	12%	22%	7%	12%	22%	9%
Mountains or hills	14%	29%	11%	10%	12%	7%	14%	26%	9%	21%	9%	13%

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 n=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

Trip taker party composition	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Partner	48%	55%	68%	57%	40%	43%	47%	24%	47%	47%	55%	63%
Children or young adults (aged 16-24)	30%	25%	30%	26%	24%	15%	29%	36%	31%	59%	29%	25%
Friend/s	19%	11%	5%	15%	25%	21%	22%	17%	19%	6%	24%	12%
Other members of my family	15%	19%	12%	12%	10%	24%	24%	24%	6%	12%	10%	9%
Pets	7%	7%	6%	10%	5%	6%	5%	7%	5%	5%	9%	8%
With parents of older adults	6%	6%	3%	4%	3%	5%	7%	17%	1%	6%	5%	4%
Will travel alone	5%	6%	4%	4%	7%	2%	3%	10%	4%	2%	3%	9%
Other	10%	3%	6%	12%	10%	10%	4%	2%	19%	4%	9%	7%

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

Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Hotel / Motel / Inn	40%	42%	55%	32%	65%	35%	41%	25%	45%	36%	28%	33%
Stayed in a rented house or similar	25%	23%	18%	21%	10%	28%	22%	31%	46%	36%	22%	19%
Friends or relatives' home	22%	14%	16%	13%	24%	18%	29%	33%	10%	19%	24%	26%
Guest house / B&B	17%	9%	14%	20%	6%	17%	19%	25%	15%	9%	13%	17%
Serviced apartment	16%	8%	1%	8%	13%	18%	13%	26%	31%	16%	15%	14%
Second home / Timeshare	17%	2%	2%	13%	17%	7%	7%	31%	23%	19%	11%	13%
Hostel	15%	8%	6%	11%	14%	12%	10%	33%	14%	15%	14%	15%
Static caravan - not owned by you	12%	13%	14%	9%	5%	9%	12%	18%	11%	8%	11%	12%
In someone else's home on a commercial basis – rental of room only	12%	5%	10%	6%	13%	15%	10%	16%	15%	15%	6%	14%

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.

Less common accommodation choices among Autumn Intenders are caravan/camping/glamping, which links with the season.

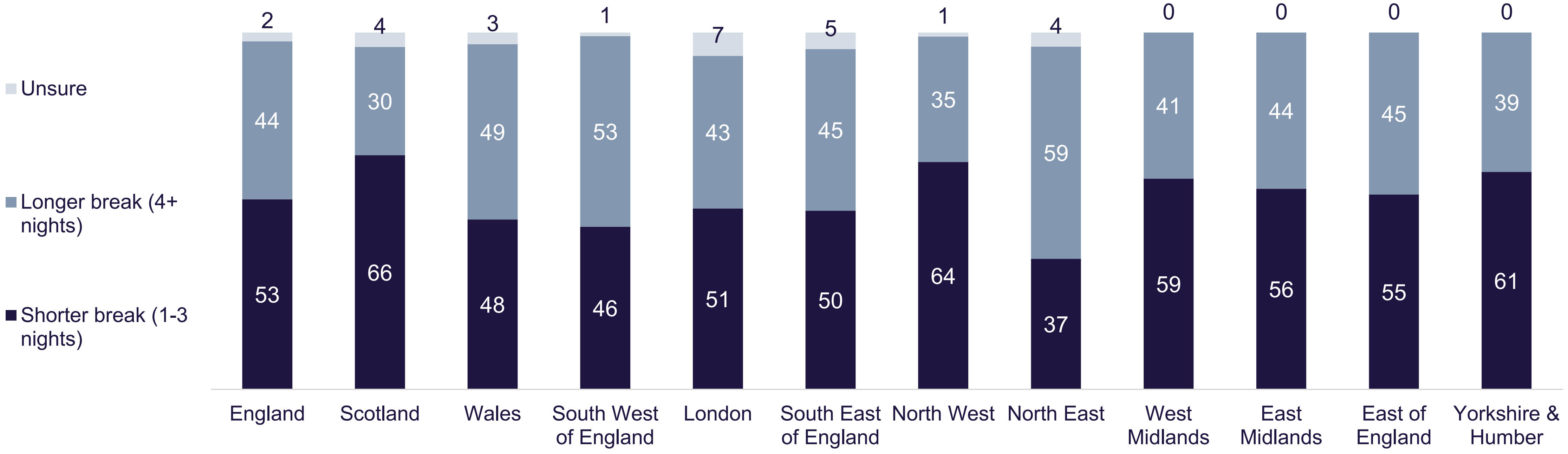
Table 10. Accommodation type of Autumn trip by destination region, Percentage, July to September data, UK, Bottom 8 ranked by all Autumn Intenders

Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Static caravan - owned by you	12%	2%	5%	6%	12%	15%	7%	18%	7%	9%	14%	12%
Campervan / Motorhome	9%	2%	5%	4%	11%	5%	5%	9%	11%	1%	7%	10%
In someone else's home on a commercial basis – rental of full property	5%	7%	6%	6%	8%	6%	1%	4%	6%	1%	8%	4%
Glamping / Alternative accommodation	5%	1%	4%	2%	3%	8%	8%	10%	9%	5%	2%	6%
Touring caravan	5%	2%	4%	3%	7%	2%	5%	5%	4%	4%	9%	5%
Farmhouse	3%	7%	6%	7%	0%	2%	3%	0%	3%	0%	3%	4%
Tent	4%	3%	2%	4%	6%	1%	2%	9%	3%	7%	4%	2%
Other	2%	0%	2%	2%	1%	3%	2%	0%	0%	0%	7%	0%

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



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

Motivations	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Family time or time with my partner	37%	46%	51%	49%	31%	34%	35%	40%	19%	36%	43%	36%
To get away from it all and have a rest	37%	40%	56%	52%	36%	35%	38%	9%	26%	18%	46%	51%
To connect with nature / be outdoors	17%	20%	22%	19%	12%	25%	20%	0%	9%	18%	16%	13%
To travel somewhere new	17%	18%	24%	23%	12%	11%	13%	7%	24%	13%	19%	14%
To spend time with friends	19%	13%	9%	11%	21%	17%	20%	9%	25%	22%	23%	19%
To celebrate a special occasion	13%	17%	11%	6%	18%	10%	15%	10%	22%	14%	19%	18%
To go somewhere where there was great food	11%	13%	12%	9%	12%	8%	9%	6%	12%	12%	11%	8%

VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All respondents planning on taking a holiday or short break in the UK in 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.

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

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

VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All respondents planning on taking a holiday or short break in the UK in 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

Activities	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Trying local food and drink	35%	41%	53%	41%	28%	32%	31%	32%	41%	28%	28%	49%
Walking, Hiking or Rambling	31%	46%	51%	38%	17%	42%	35%	20%	29%	44%	32%	27%
Explore scenic areas by car	18%	42%	32%	29%	7%	11%	16%	21%	12%	17%	22%	18%
Visit heritage sites	19%	22%	34%	26%	17%	29%	11%	13%	5%	22%	14%	27%
Visit cultural attractions	21%	26%	17%	24%	30%	21%	15%	21%	16%	15%	16%	25%
Nature and wildlife experiences	17%	23%	19%	24%	9%	20%	11%	18%	19%	26%	21%	10%
Visit family attractions	17%	16%	17%	17%	20%	11%	19%	12%	19%	13%	14%	20%
Learn about local history and culture	15%	16%	28%	21%	12%	26%	6%	16%	8%	19%	7%	13%
Experience the nightlife	17%	14%	10%	10%	22%	13%	16%	11%	21%	15%	12%	24%
Adventure activities	13%	9%	10%	9%	9%	11%	17%	6%	13%	15%	19%	11%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?
Base: All respondents planning on taking a holiday or short break in the UK in 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

Activities	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Speciality shopping	14%	10%	14%	7%	23%	7%	11%	13%	10%	16%	14%	18%
Health or wellbeing experiences	12%	5%	1%	8%	9%	11%	10%	9%	15%	11%	12%	16%
Water sports	11%	10%	4%	9%	7%	17%	13%	15%	0%	11%	15%	6%
Visit locations featured in TV, film or literature	10%	10%	6%	10%	13%	2%	7%	7%	12%	3%	7%	8%
Cycling or mountain biking	9%	15%	5%	12%	12%	0%	9%	2%	3%	10%	8%	7%
Creative or artistic pursuits	7%	7%	2%	3%	7%	9%	2%	8%	7%	8%	6%	6%
Conservation or volunteering activities	4%	3%	5%	3%	3%	1%	2%	3%	4%	10%	4%	4%
Golf	4%	0%	2%	4%	5%	3%	8%	0%	3%	3%	1%	3%
None of these	3%	1%	3%	4%	2%	8%	4%	4%	0%	0%	2%	5%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?
Base: All respondents planning on taking a holiday or short break in the UK in 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.

Methodology Notes

Methodology outline

- The findings in this report are based on an online survey conducted amongst a sample of the UK adult population.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Wales and to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

Master Data Table

- To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.