



VisitEngland™

**Are Staycations here to stay?**

# What were the predictions for summer 2022?

ism industry.” Michels said he did not expect demand for domestic holidays this summer to surpass the heights of summer 2021, but it was possible levels of interest could mirror last year.

Sir David Michels (President of the Tourism Alliance), Financial Times, 25<sup>th</sup> June 2022

## The UK's current staycation boom is unlikely to be sustainable, experts say

The Independent's travel correspondent Simon Calder hosted 'Travelling to the other side of the pandemic', the latest in our virtual event series

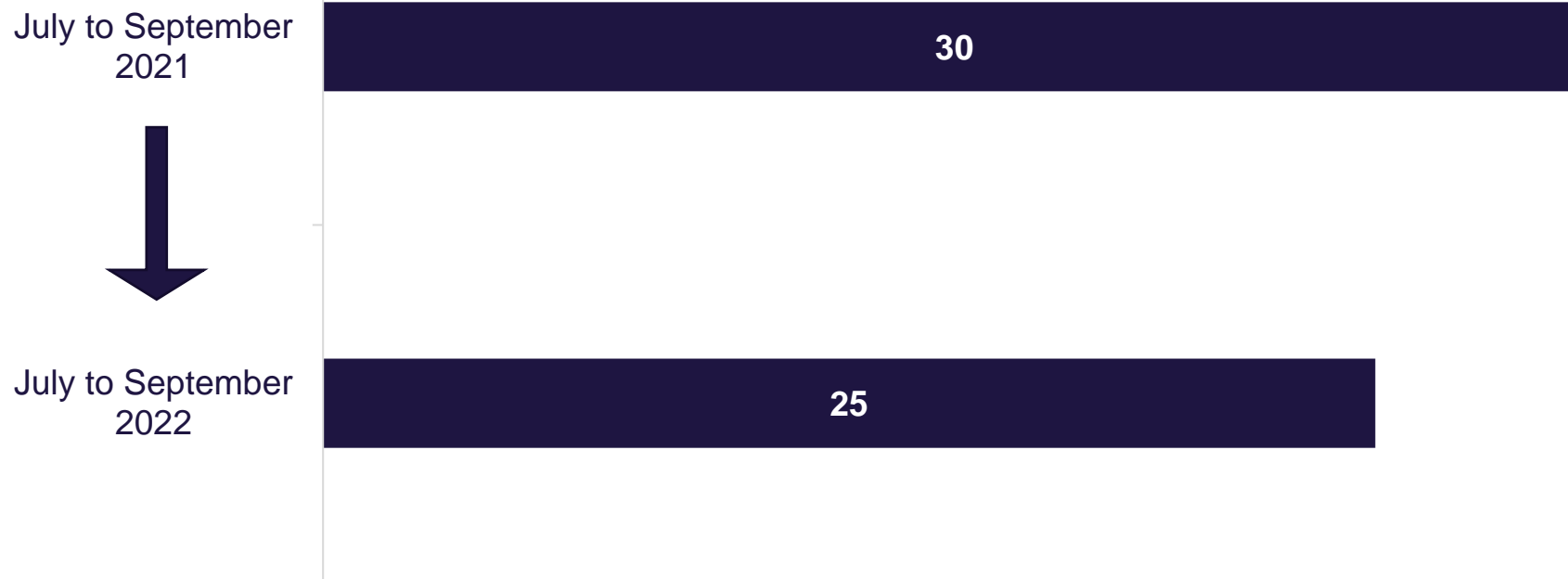
Thursday 09 September 2021 09:41 • [Comments](#)



Simon Calder, The Independent, 9<sup>th</sup> September 2021

# Compared to summer 2021, the proportion of UK adults who took a domestic overnight trip during summer 2022 declined.

% OF UK ADULTS WHO TOOK DOMESTIC OVERNIGHT TRIPS, OCTOBER FIELDWORK





**Why wasn't  
this year as  
good as 2021  
in terms of  
staycations?**

**Location:** Southwold; Suffolk; England / **credit:** VisitBritain/Ollie Kilvert

# **1. SWITCH TO OVERSEAS**

1

# Overall, domestic and overseas travel combined, summer 2022 was in line with 2021.

% OF UK ADULTS WHO TOOK UK AND/OR OVERSEAS OVERNIGHT TRIPS, OCTOBER FIELDWORK

July to September  
2021

**34% took a domestic/overseas trip**



July to September  
2022

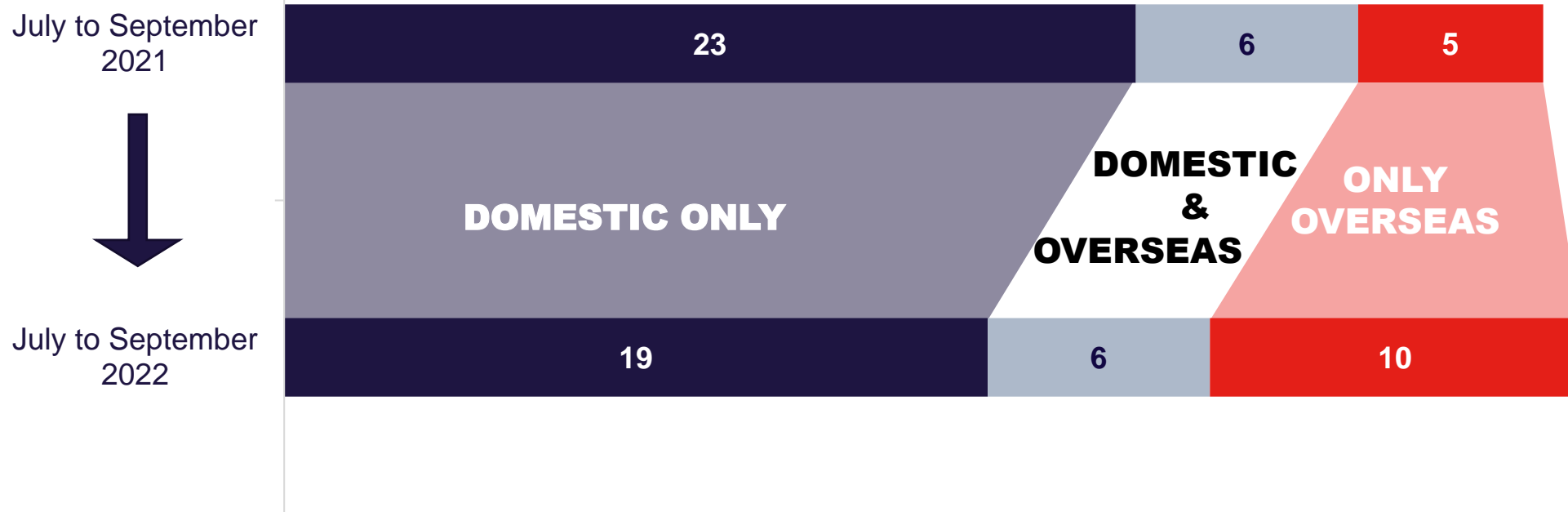
**35% took a domestic/overseas trip**



1

# So the main reason for decrease in domestic travel is most likely the switch to overseas trips.

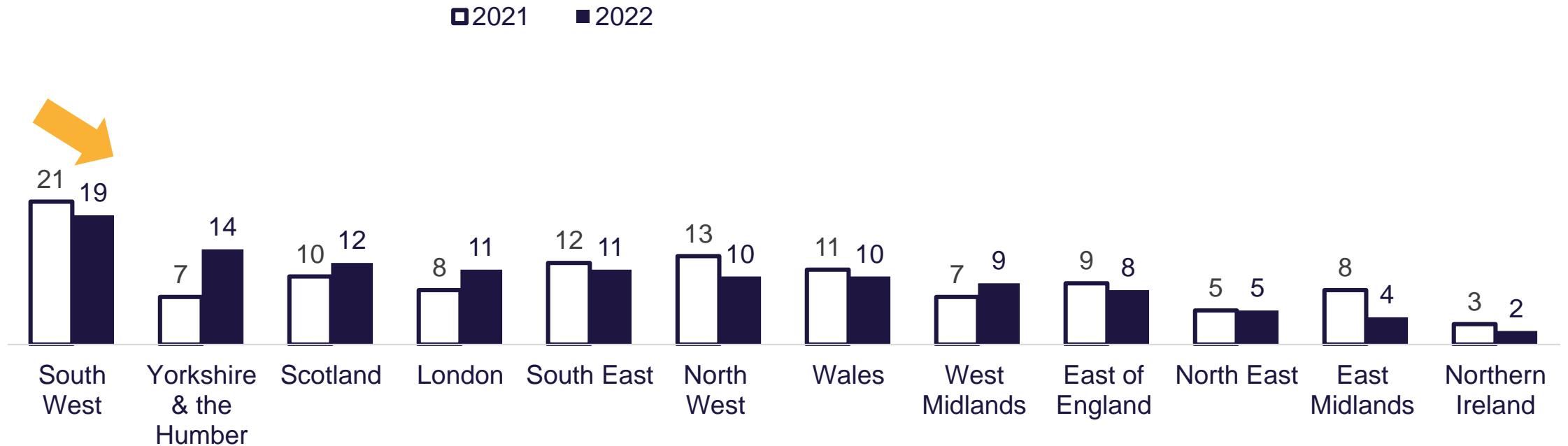
% OF UK ADULTS WHO TOOK UK AND/OR OVERSEAS OVERNIGHT TRIPS, OCTOBER FIELDWORK



1

# For those who did holiday in the UK, fewer UK adults went to the South West, which may be driven by a shift to seaside holidays overseas, rather than in the UK.

DESTINATION REGION OF MOST RECENT UK OVERNIGHT TRIP BETWEEN JULY AND AUGUST, PERCENTAGE, SEPTEMBER FIELDWORK, UK

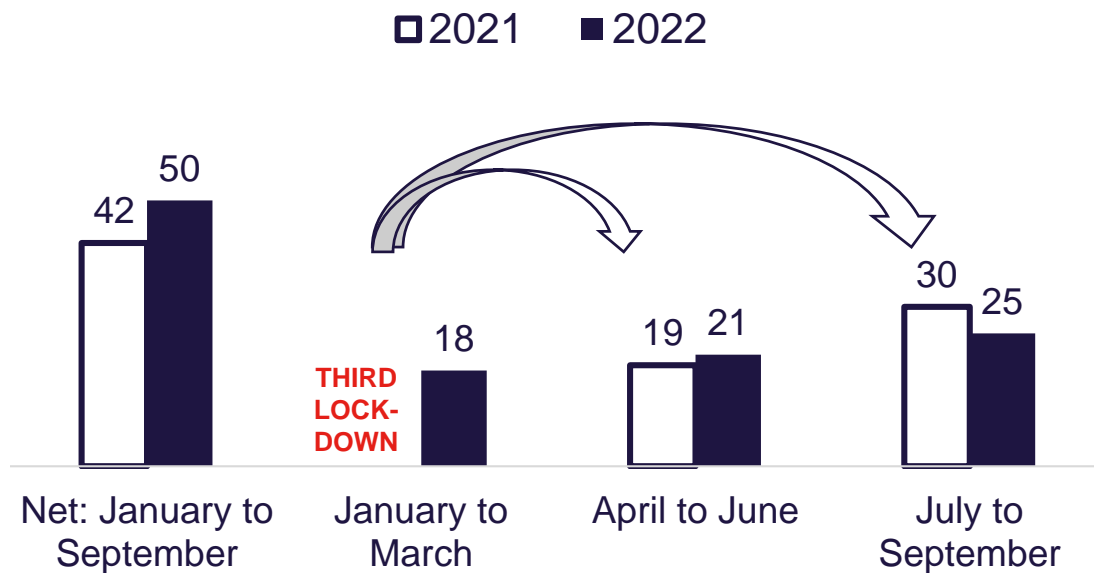




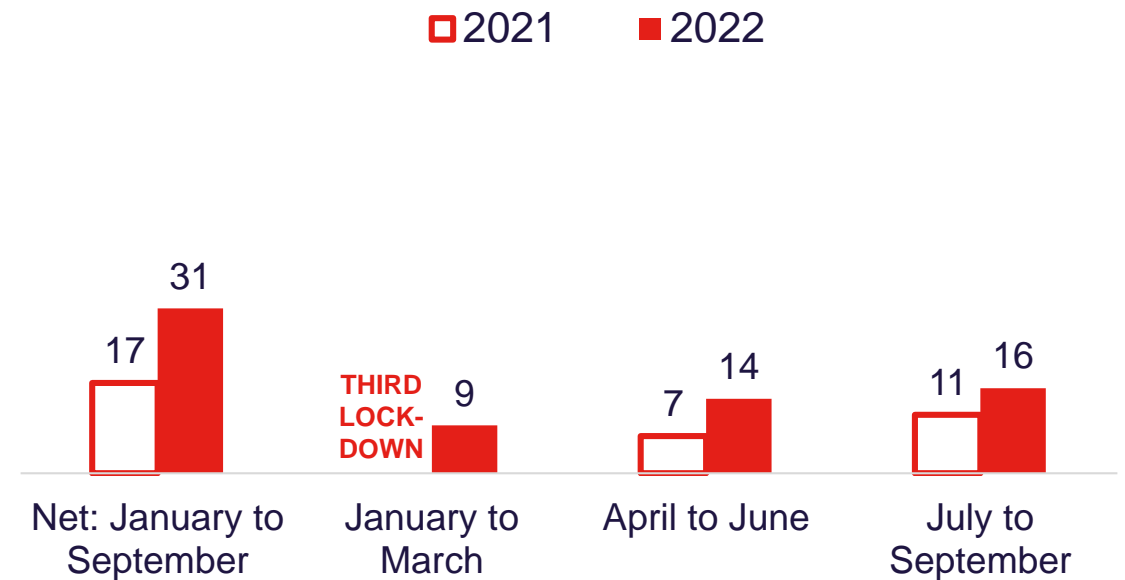
## **2. DISPLACEMENT EFFECT OF 2021**

## In Q1 2021, travel was restricted, resulting in a ‘squeezed’ trip-taking window later in 2021... which created an artificially high benchmark for domestic summer.

% OF UK ADULTS WHO TOOK UK OVERNIGHT TRIPS, OCTOBER FIELDWORK

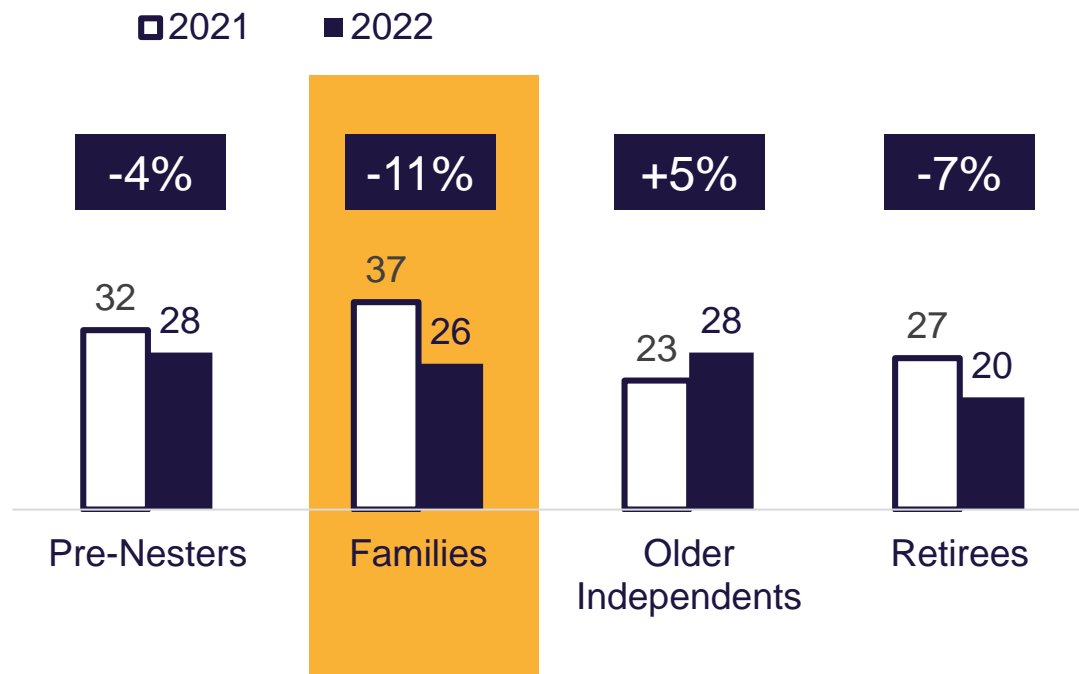


% OF UK ADULTS WHO TOOK OVERSEAS OVERNIGHT TRIPS, OCTOBER FIELDWORK

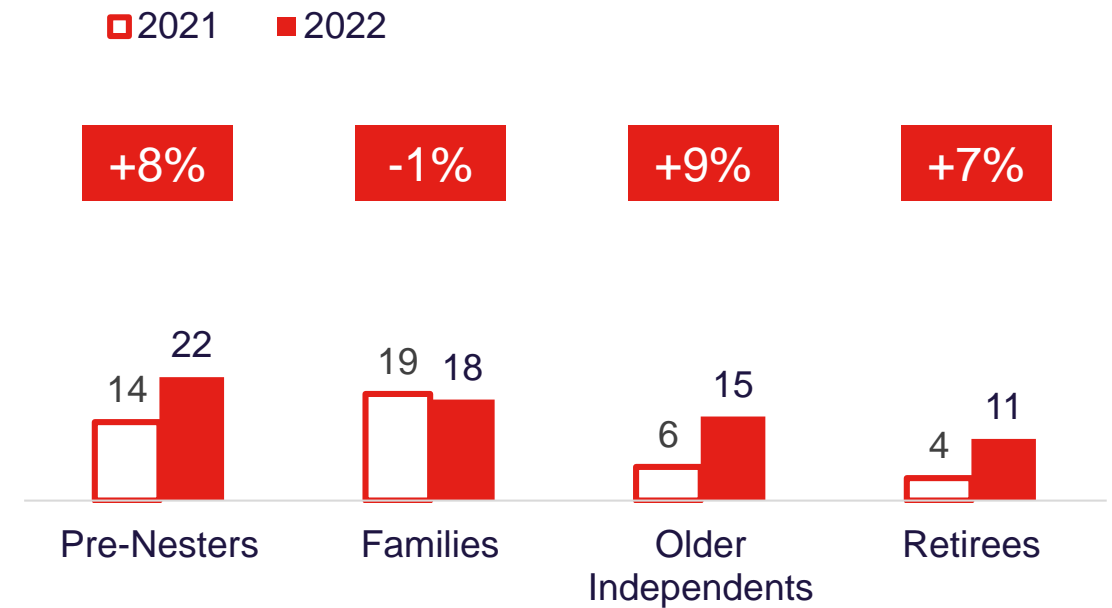


## Families are showing the largest drop in domestic overnight trips in summer 2022, vs 2021. They were probably most keen to go on a holiday in summer 2021.

TOOK OVERNIGHT UK TRIPS IN SUMMER, %, OCTOBER FIELDWORK, UK



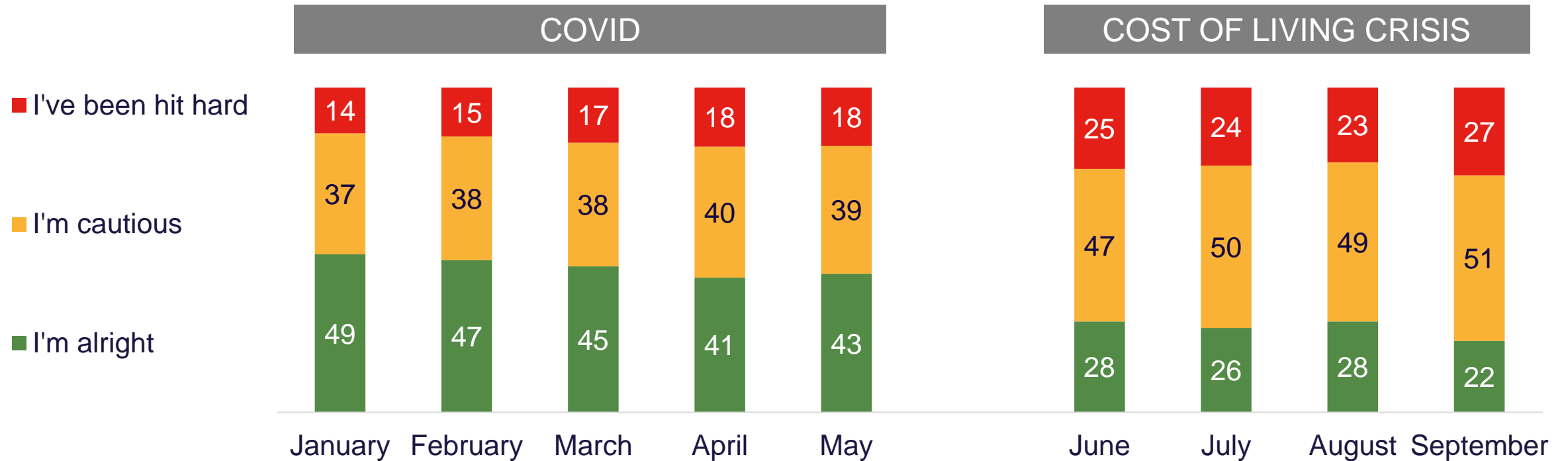
TOOK OVERNIGHT OVERSEAS TRIPS IN SUMMER, %, OCTOBER FIELDWORK, UK



# **3. FINANCIAL CONCERNS**

## More and more people's finances are being 'hit hard'.

### PERSONAL FINANCES AS AN IMPACT OF....

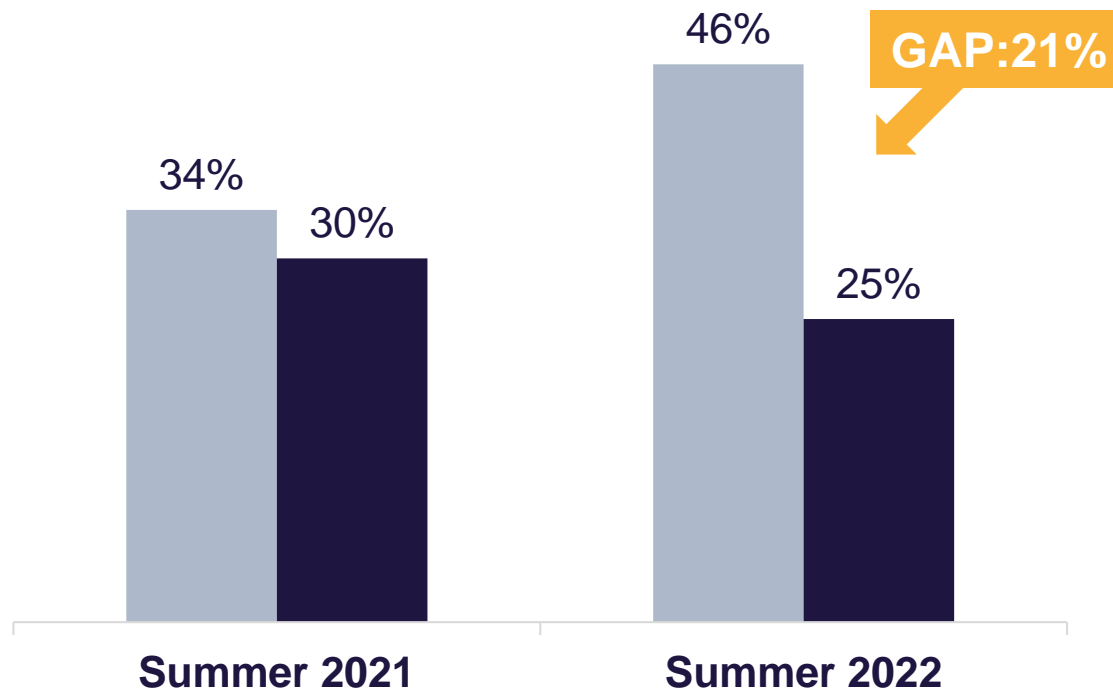


3

# Trip intentions for summer 2022 were strong, however, not as many did actually take their trip.

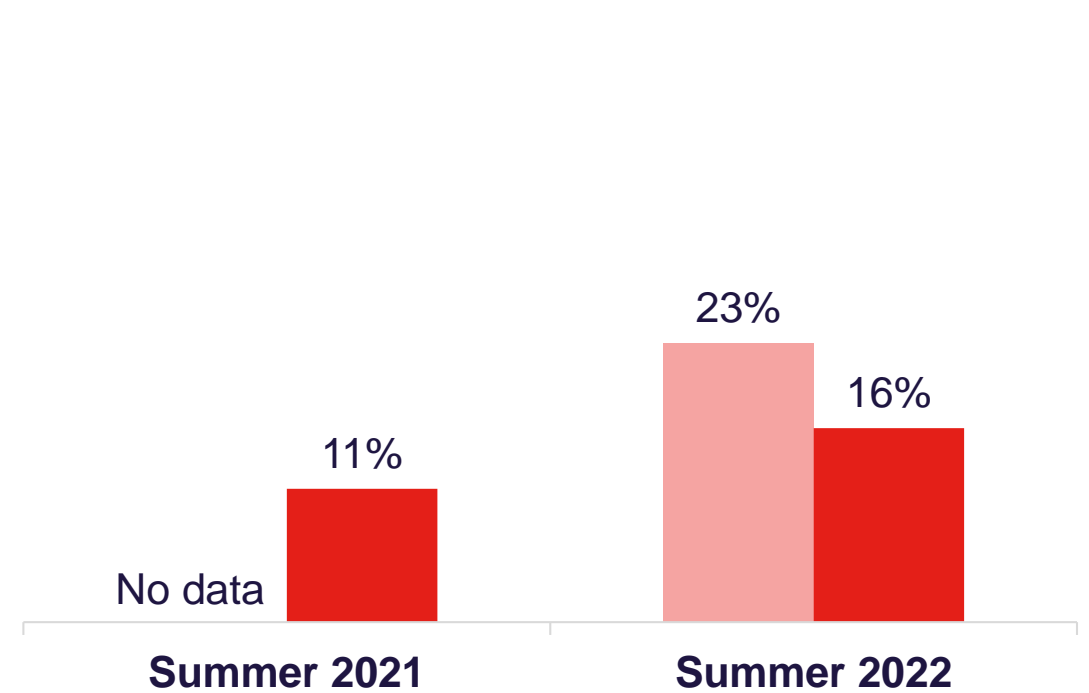
## DOMESTIC

■ Intended a trip ■ Taken a trip



## OVERSEAS

■ Intended a trip ■ Taken a trip



3

## Last minute bookings and last minute cancellations have been on the rise, especially in recent months.

### DEMAND

In January 2022,  
46% UK adults said  
'free cancellations'  
are essential



### ENABLER

Covid pandemic accelerated the evolution and use of digital channels for bookings. It is now extremely easy and convenient to make a booking, as well as to cancel an existing booking



### RESULT

Last minute booking and cancellations are on the rise over the past few years but even more so over the recent months.



## And if the trip goes ahead, UK adults looked for money saving options, including free activities to do on their holidays, cheaper accommodation and spending less on eating out.

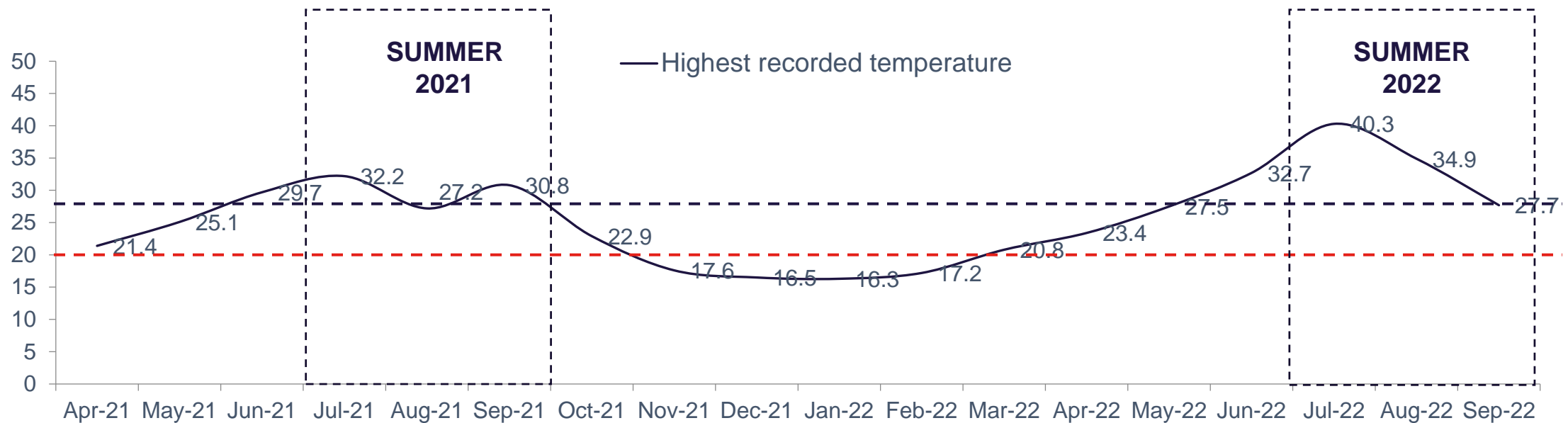
COST OF LIVING CRISIS' IMPACT ON UK HOLIDAYS AND SHORT BREAKS, PERCENTAGE, JULY 2022 FIELDWORK



# **4. WEATHER CONDITIONS**

# The UK's weather may also have played a role in driving travel behavior, this summer's temperatures crossed the ideal limits making indoor and outdoor activity less likely.

HIGHEST RECORDED TEMPERATURES BY MONTH, DEGREES CELSIUS, UK



National Trust Climate Research:  
The optimum weather for a National Trust day out is 21C

UPPER  
THRESHOLD  
FOR OUTDOOR  
ATTRACTIONS:  
28°C

UPPER  
THRESHOLD  
FOR INDOOR  
ATTRACTIONS:  
20°C

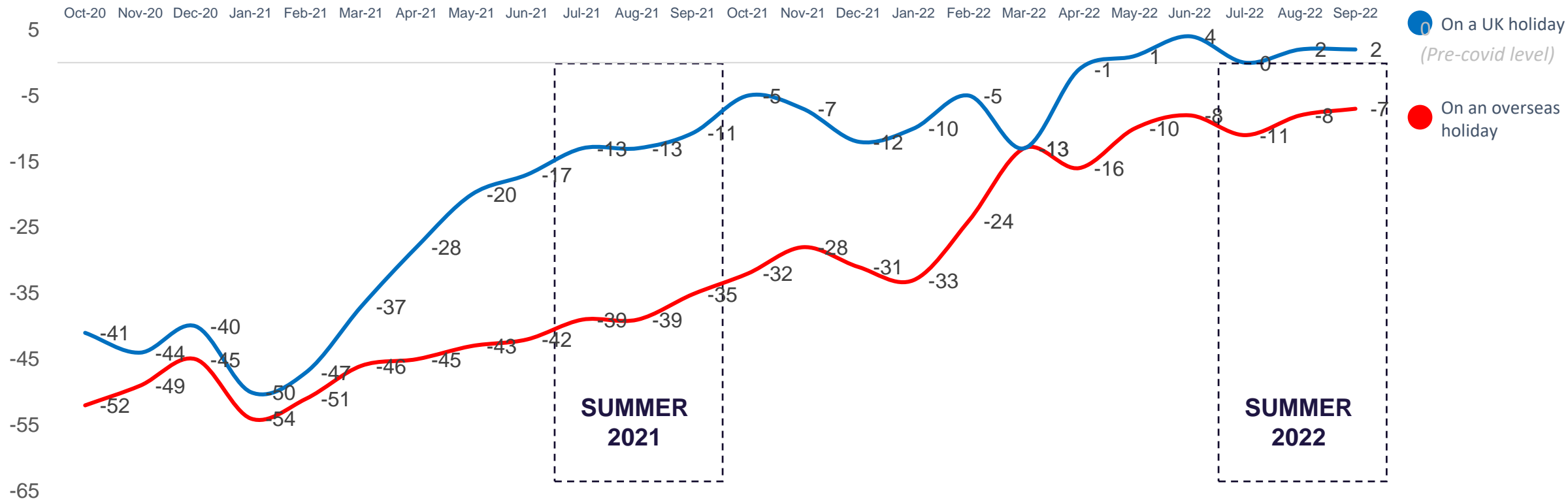


# Projecting into the future

**Location:** Grasmere; Cumbria; England / **credit:** VisitBritain/Stefano Carta

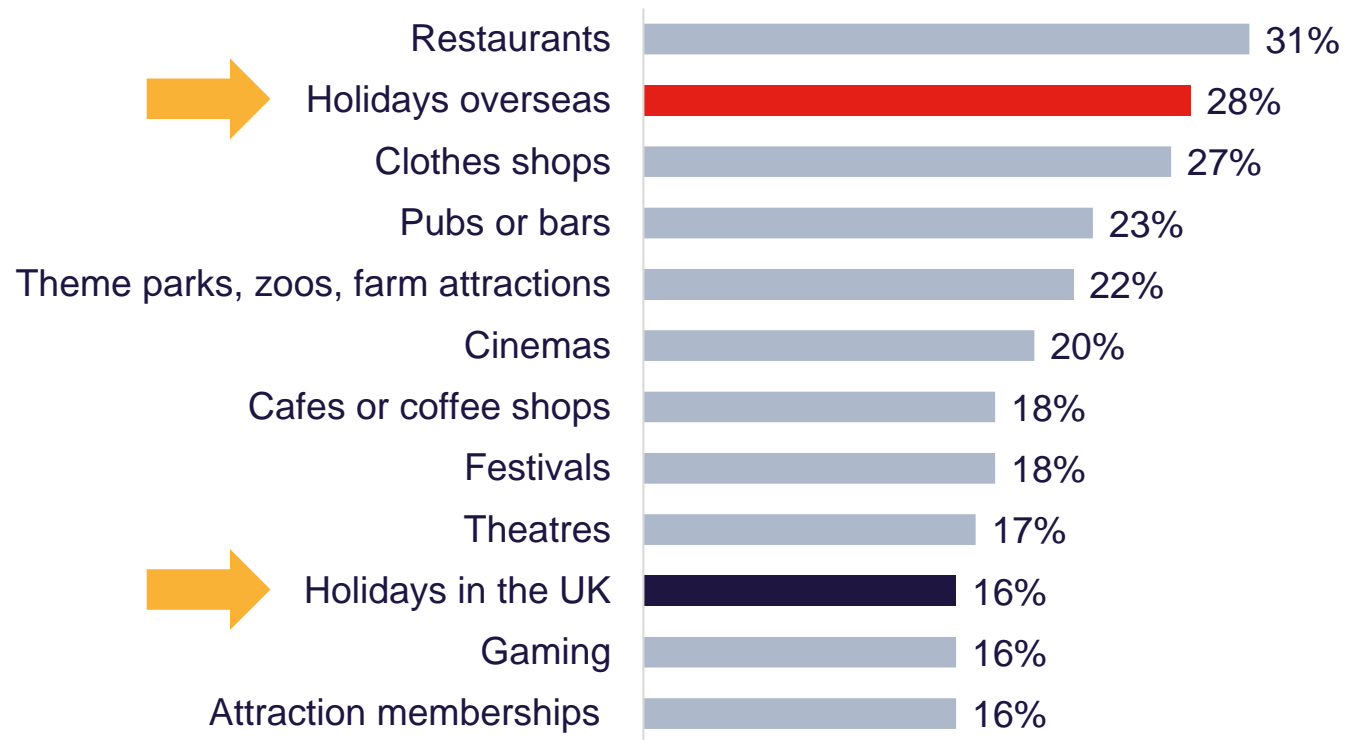
# UK adults feel more comfortable with overseas travel, so considering the impact of Covid, overseas trip intentions could grow next summer. However, personal finances will play a key role...

COMFORT GAP: THE DIFFERENCE BETWEEN COMFORT LEVELS NOW AND BEFORE THE PANDEMIC, UK



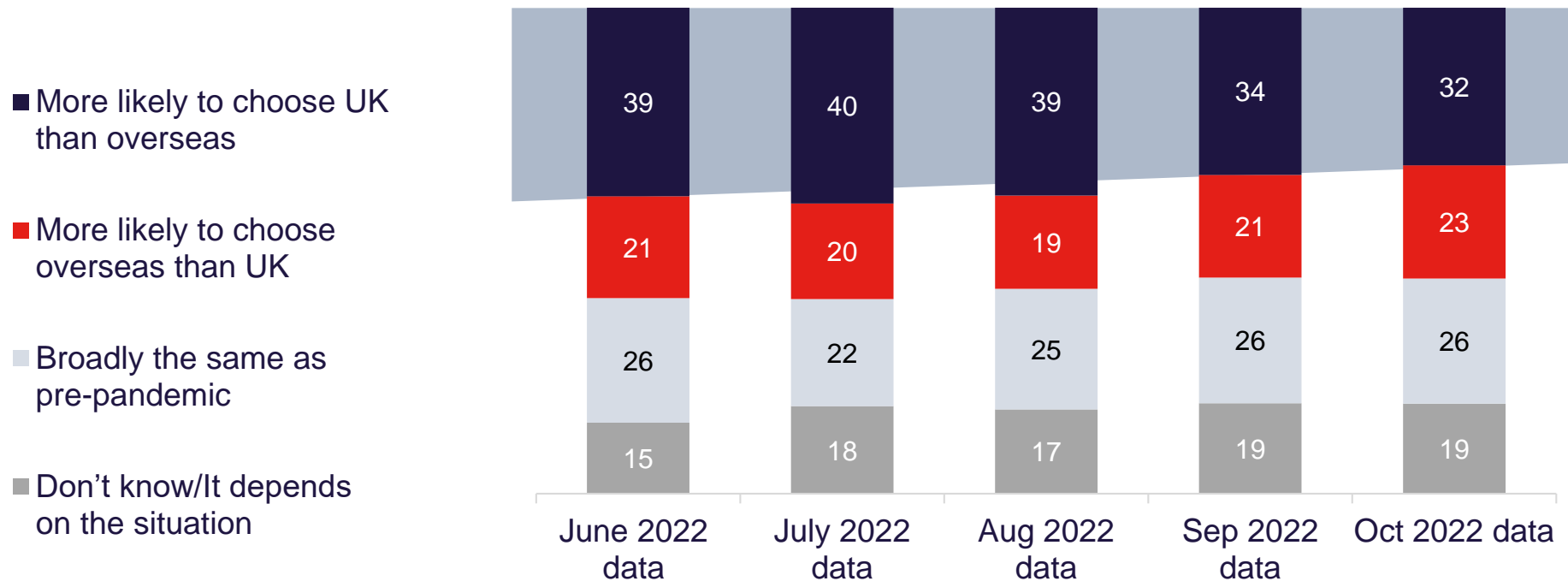
# ... overseas holidays are more likely to be sacrificed than UK holidays.

THE TOP 5 ACTIVITIES MOST LIKELY TO CUT BACK ON DUE TO THE 'COST-OF-LIVING' CRISIS, PERCENTAGE OF ALL WHO DO EACH ACTIVITY, OCTOBER FIELDWORK, UK



# Fewer UK adults now saying they would choose domestic over holidays overseas. There is also a growing proportion of those undecided.

DIFFERENCE IN SHORT BREAK/HOLIDAY CHOICES IN THE NEXT 6 MONTHS  
COMPARED TO PRE-PANDEMIC, PERCENTAGE, OCTOBER 2022, UK





**Domestic holidays have clear advantages: more likely to be perceived as cheaper than overseas, plus, offering reduced stress linked to planning and travelling to the destination.**

### TOP 5 reasons for UK preference

1. UK holidays are easier to plan (66%)
- 2. UK holidays are cheaper (53%)
3. To avoid long queues at airports / cancelled flights (45%)
4. Shorter / quicker travel (44%)
5. Uncertainty around restrictions at overseas destinations (35%)

### TOP 5 reasons for Overseas preference

1. Better weather (40%)
2. I want to visit new places (38%)
3. I want to explore other cultures (31%)
- 4. Overseas holidays are cheaper (24%)
5. I'm prioritising overseas trips after missing out during the pandemic (23%)

# While 40% choose overseas holidays because of the weather, it is not a deal breaker.

**The weather affects the experience – but not as much as we might expect!**

**Weather on Holiday**

**Good**

**Mixed**

**Poor**



**Holiday Experience**

**% Excellent/Very Good**

**90%**

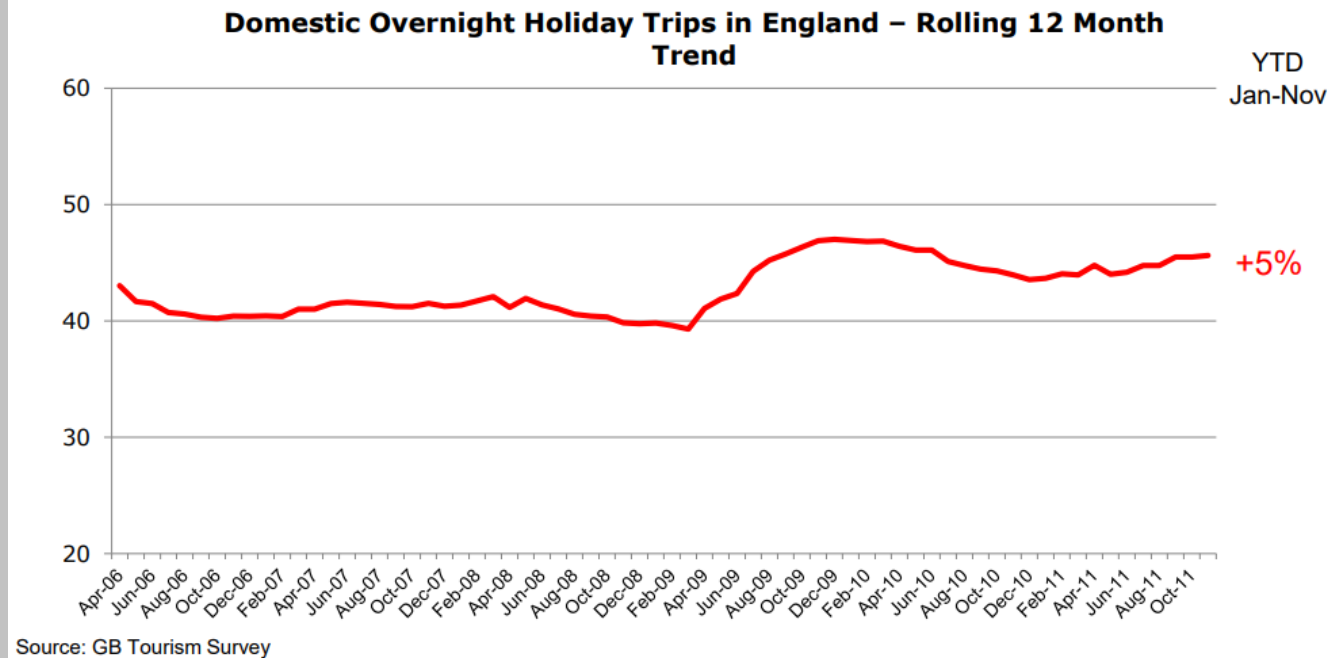
**85%**

**72%**

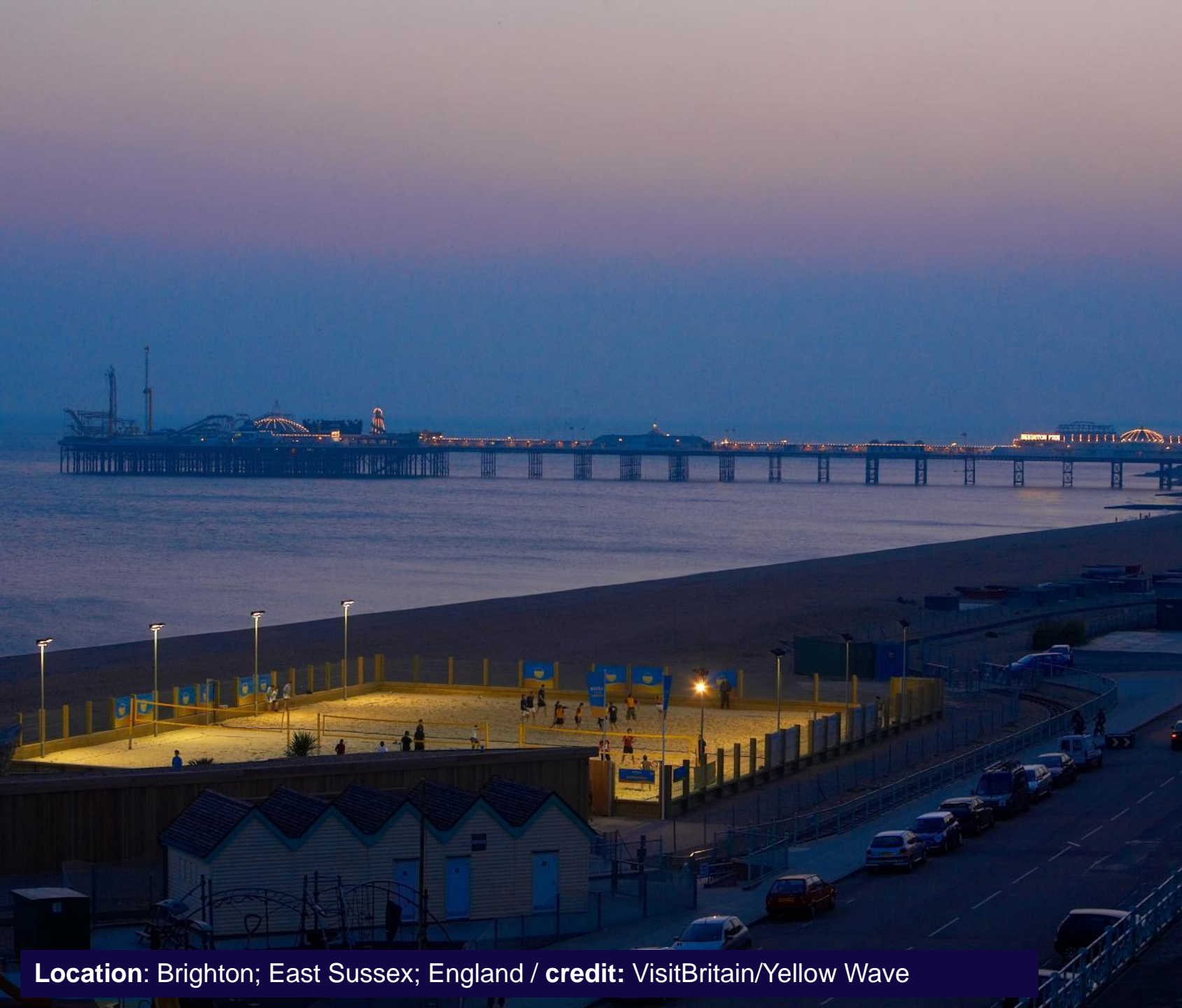
**VisitEngland** 

**Learning from past, as a result of 2008 credit crunch, there was an increase in staycations, and the staycations trend continued for next few years after.**

**2011 holiday volumes are below 2009 peak, but remain well above pre-recession levels**



Experiencing staycations has a positive impact on attitudes to holidaying in England, this tends to create **momentum** into the next few years.



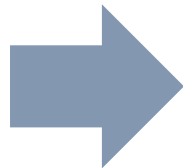
**In  
conclusion...**

**Location:** Brighton; East Sussex; England / **credit:** VisitBritain/Yellow Wave

# Looking forward, domestic holidays trend is likely to continue into 2023

## FACTORS TO CONSIDER

Making up for missed overseas travel during pandemic restrictions



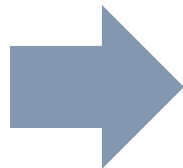
## WHAT IT MEANS FOR 2023

Slight impact (however declining) as more UK adults would feel comfortable to travel overseas



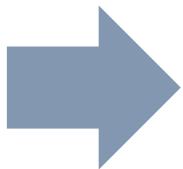
Overseas travel could benefit

General drivers: better weather overseas, exploring new places, etc.



Ongoing factors, no significantly different impact on 2023 vs 2022 and 2021

Pandemics and cost of living crises driving staycations

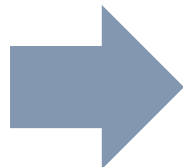


Staycations momentum (similar to 2008 recession)



Domestic travel could benefit

Financial pressure on choices and decisions



People will look for cheaper accommodation and reducing their spend while on holidays. Inconvenient exchange rates



Domestic travel could benefit

# THANK YOU

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