

Domestic Sentiment Tracker: September 2023

Published: 21st September 2023

Fieldwork Period: 1st to 7th September 2023

UK Results

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Note: * Overnight Business Trip Intentions questions are asked every second month

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Domestic Sentiment Tracker to understand the impact of major events, such as the cost of living crisis, on the UK public's intent to take overnight trips, both within the UK and abroad.
- The survey addresses areas, such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation for their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave's fieldwork was conducted between 1st to 7th September 2023.
- The results (both, reports and data tables) are made publicly available and updated each wave at the following website:

<https://www.visitbritain.org/domestic-sentiment-tracker>

Definitions used within this report

In this report, we look at the behaviour and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip.

- **October to December 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between October to December 2023
- **January to March 2024 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January to March 2024

We also segment respondents by life stage and use the following definitions:

- **Pre-Nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older Independents:** Aged 35-64 without children in household
- **Retirees:** Aged 65+

September 2023: Scorecard of Key Metrics

Key Metrics	September 2023	Change since August 2023
% of UK adults stating 'WORST IS STILL TO COME' in regard to cost of living crisis	45%	-5%*
Proportion intending a UK overnight trip at any point <u>in the next 12 months</u>	76%	+2%
Proportion intending an overseas overnight trip at any point <u>in the next 12 months</u>	62%	+6%*
Preference for UK over overseas in the next 12 months (vs past 12 months)	36%	-2%
Took a domestic overnight trip in the past 12 months (September 2022 –August 2023)	65%	+4%*
Net proportion of UK trips in the next 12 months vs the last 12 months [% 'more' minus % 'fewer' trips]	4%	-2%
Net proportion of overseas trips in the next 12 months vs the last 12 months [% 'more' minus % 'fewer' trips]	-20%	0%
Reduce the number of UK overnight trips due to cost of living crisis [NET 'fewer', 'not go', 'go day trips instead']	29%	-2%
Reduce the number of day trips due to cost of living crisis [NET 'fewer', 'not go on day trips']	32%	-2%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1 st Rising cost of living; 2 nd Personal Finances 3 rd UK weather	UK weather from 2 nd to 3 rd

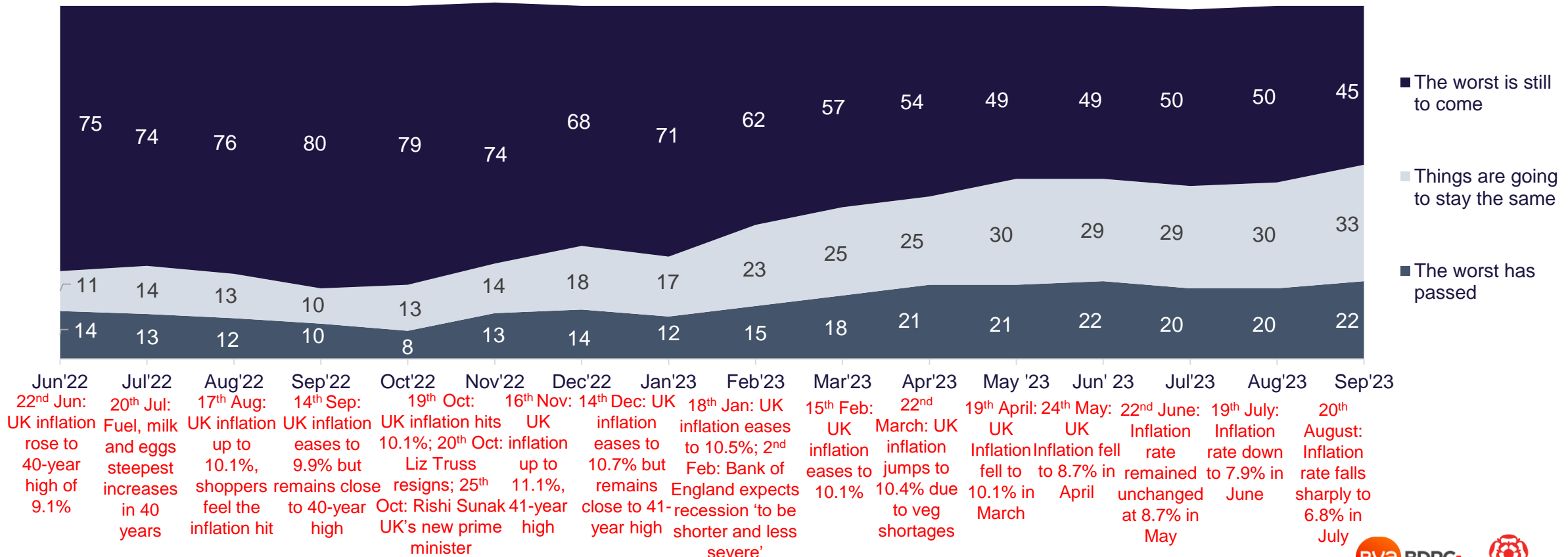
* Represents a statistically significant change on previous wave
N/A – due to new question wording meaning comparison to last wave cannot be done



1. Current General Sentiment

Fewer than half of respondents think 'the worst is still to come' in relation to the cost-of-living crisis, an improvement on recent months

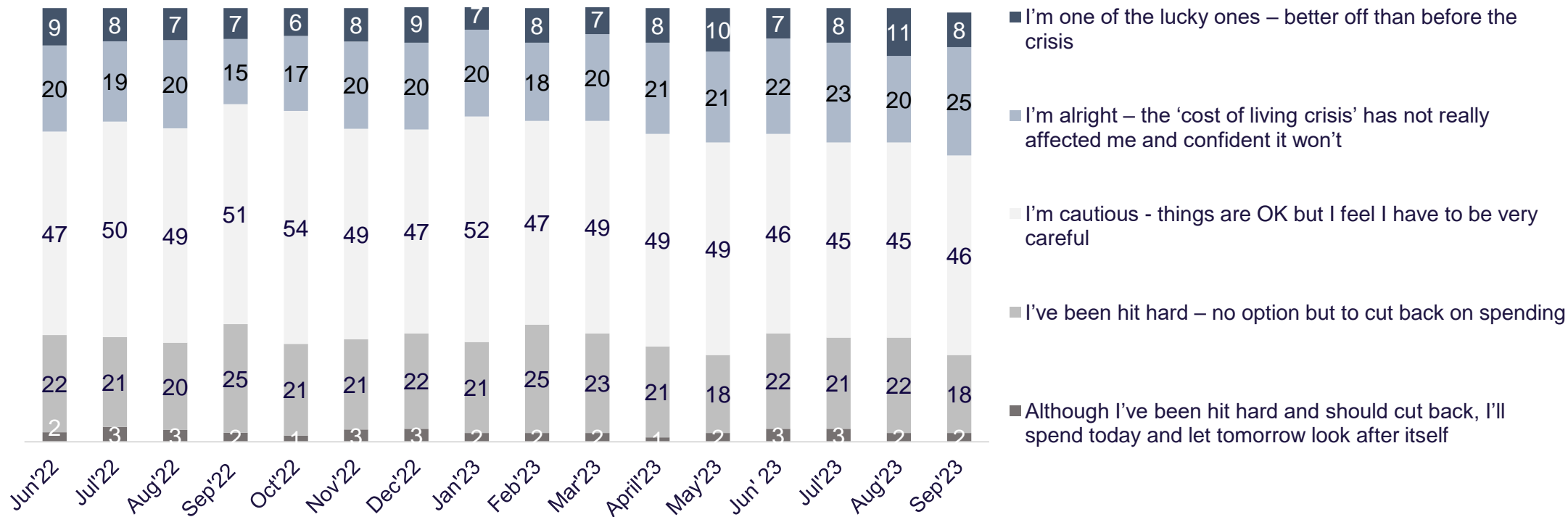
Figure 1. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK



Question: Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. September 2023 = 1,756

Due to the cost-of-living crisis, most of UK adults (64%) are either 'cautious and being very careful' (46%) or have been 'hit hard and are cutting back' (18%)

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

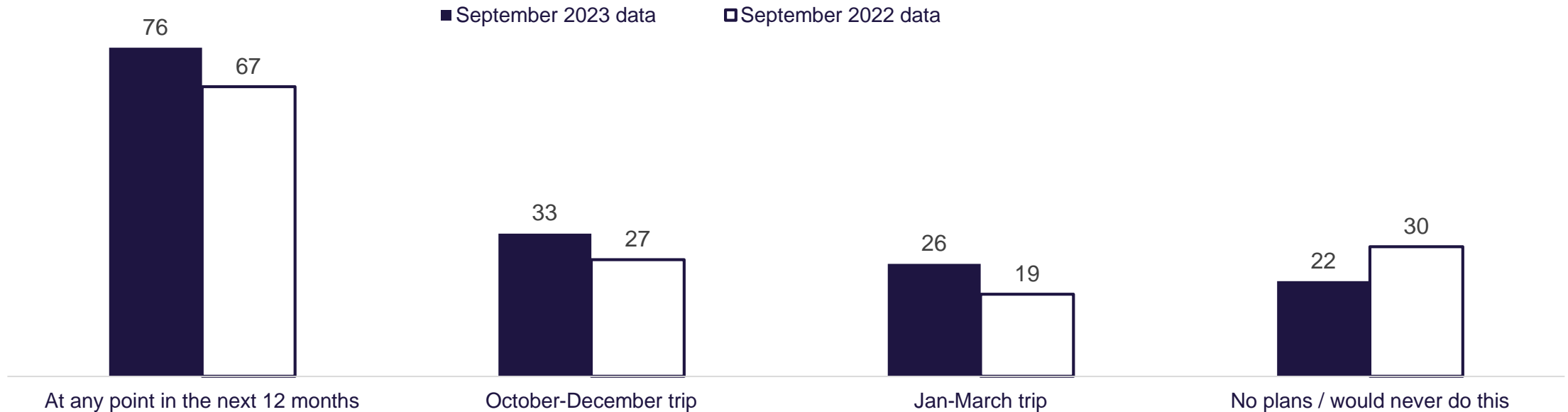


Question: Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. September 2023 = 1,756.

2. Trip Intentions: UK and Overseas

Overnight domestic trip intentions are above the levels anticipated back in September 2022, 76% planning a trip in the next 12 months compared to 67% a year earlier

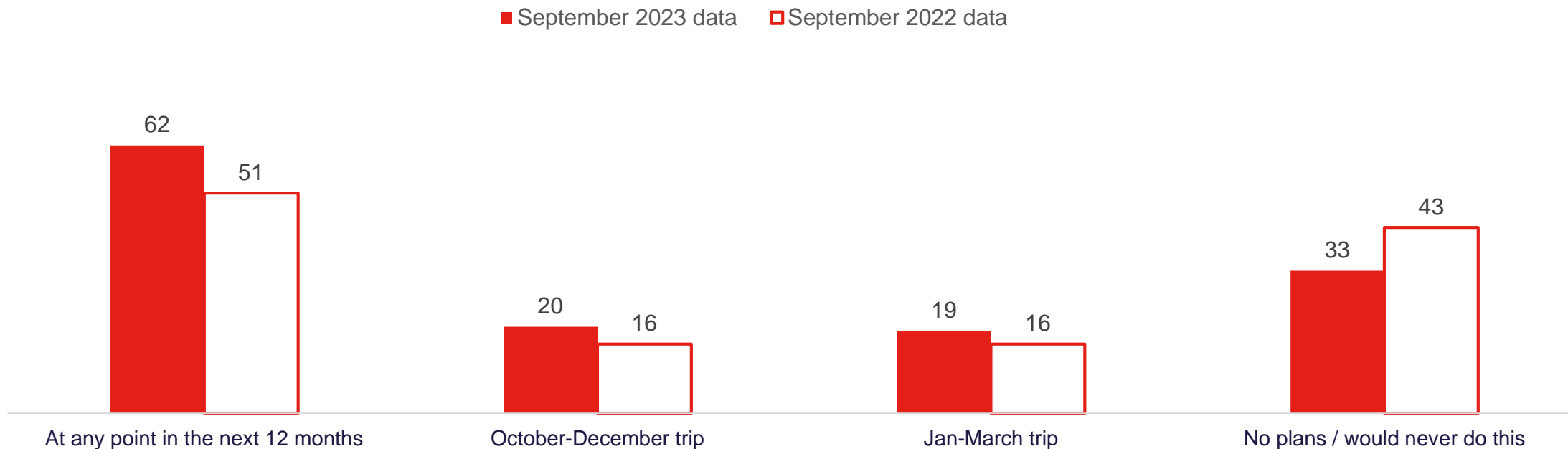
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, September 2023, UK



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. September 2022= 1,758, September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

For overnight overseas trips, intentions are also above 2022 levels, 62% planning an overseas trip in the next 12 months compared to 51% the year before

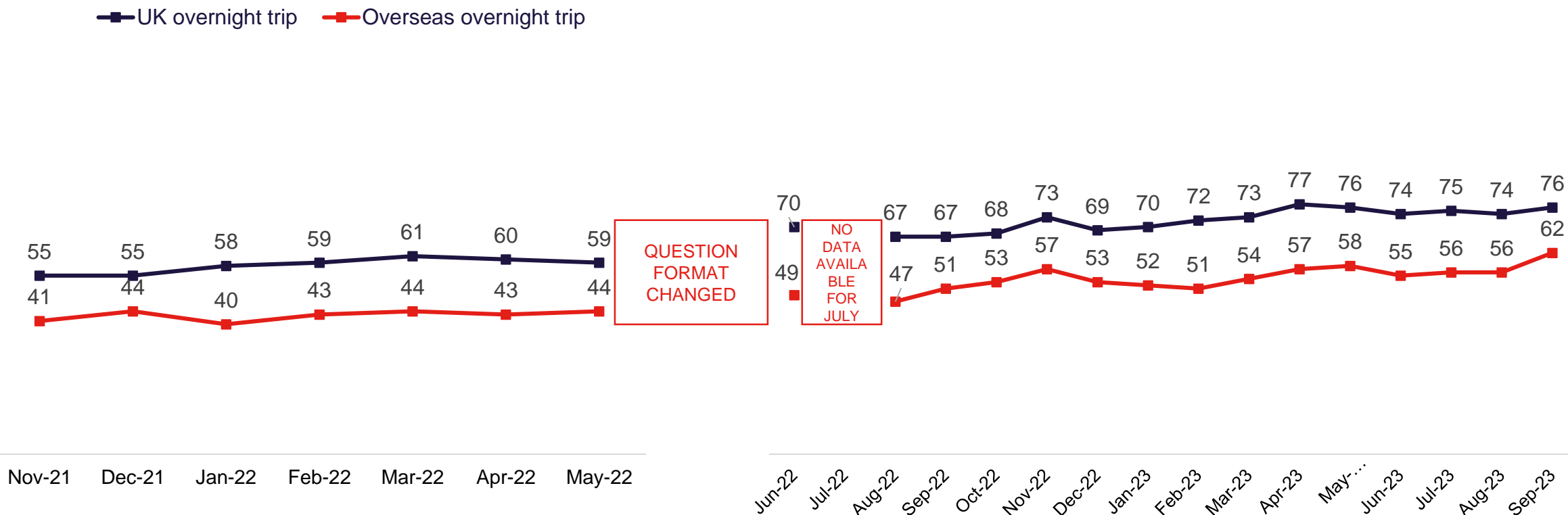
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, September 2023, UK



Question: QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. September 2022 = 1,758, September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Long term domestic overnight trip intentions have remained relatively stable since April this year, while overseas intentions jumped to 62% in September

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



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents September 2023 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

At a 'net level', the number of intended domestic trips by UK adults is above those taken in the last 12 months and have increase – overseas intentions are still below

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

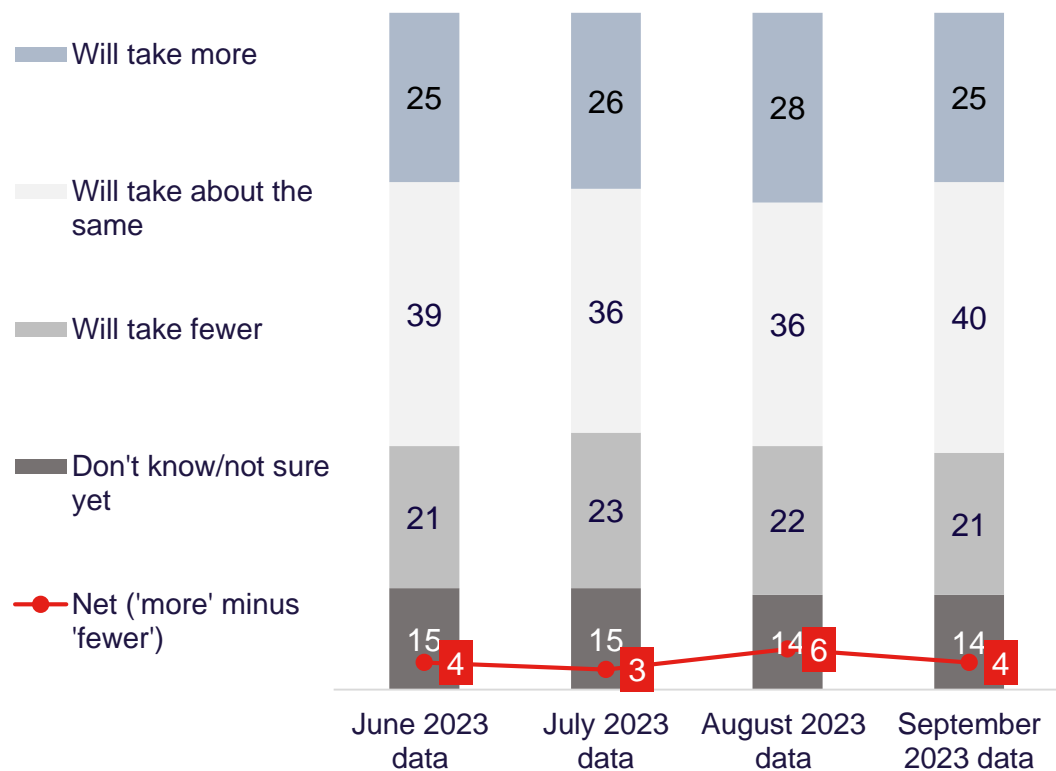
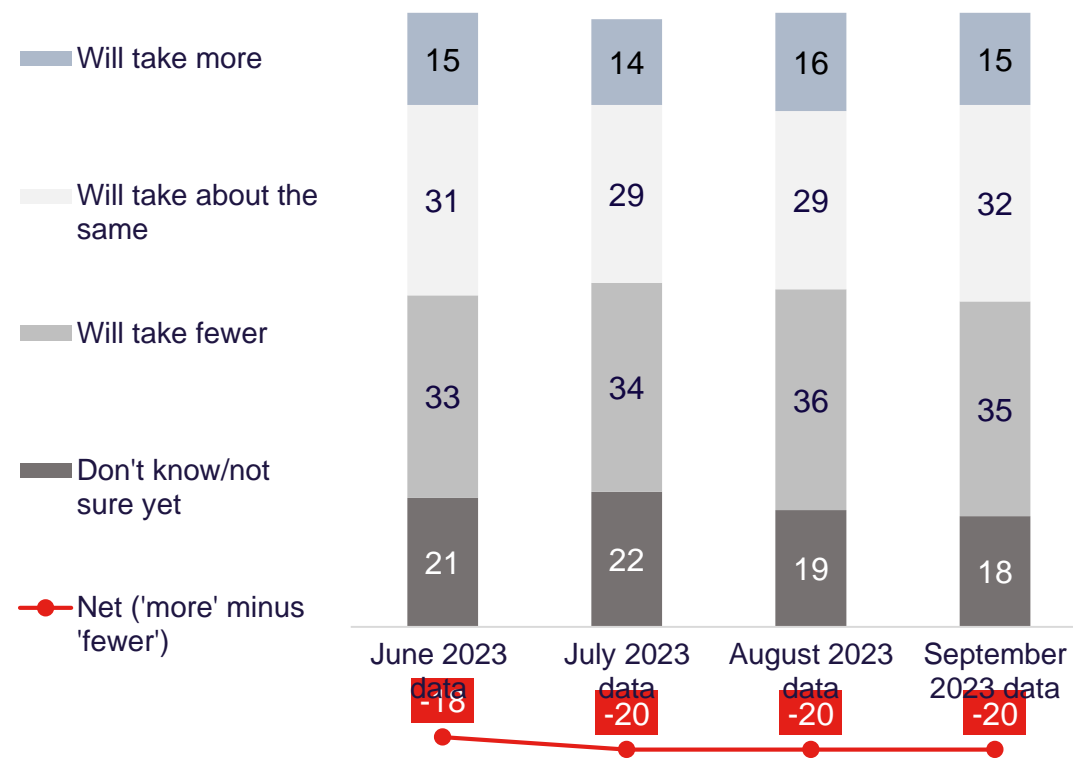


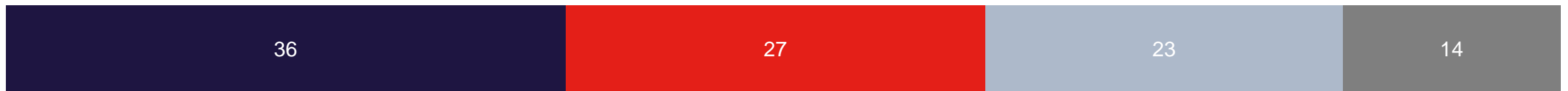
Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, September 2023, UK



36% of respondents indicated they are more likely to choose a trip in the UK than overseas, compared to the last 12 months – the top reason being ‘UK holidays are cheaper’ (51%)

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

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



TOP 5 reasons for UK preference

1. UK holidays are cheaper (51%)
2. Shorter / quicker travel (48%)
3. UK holidays are easier to plan (47%)
4. To avoid long queues at airports/cancelled flights (39%)
5. I want to take holidays in places I am familiar with (24%)

TOP 5 reasons for Overseas preference

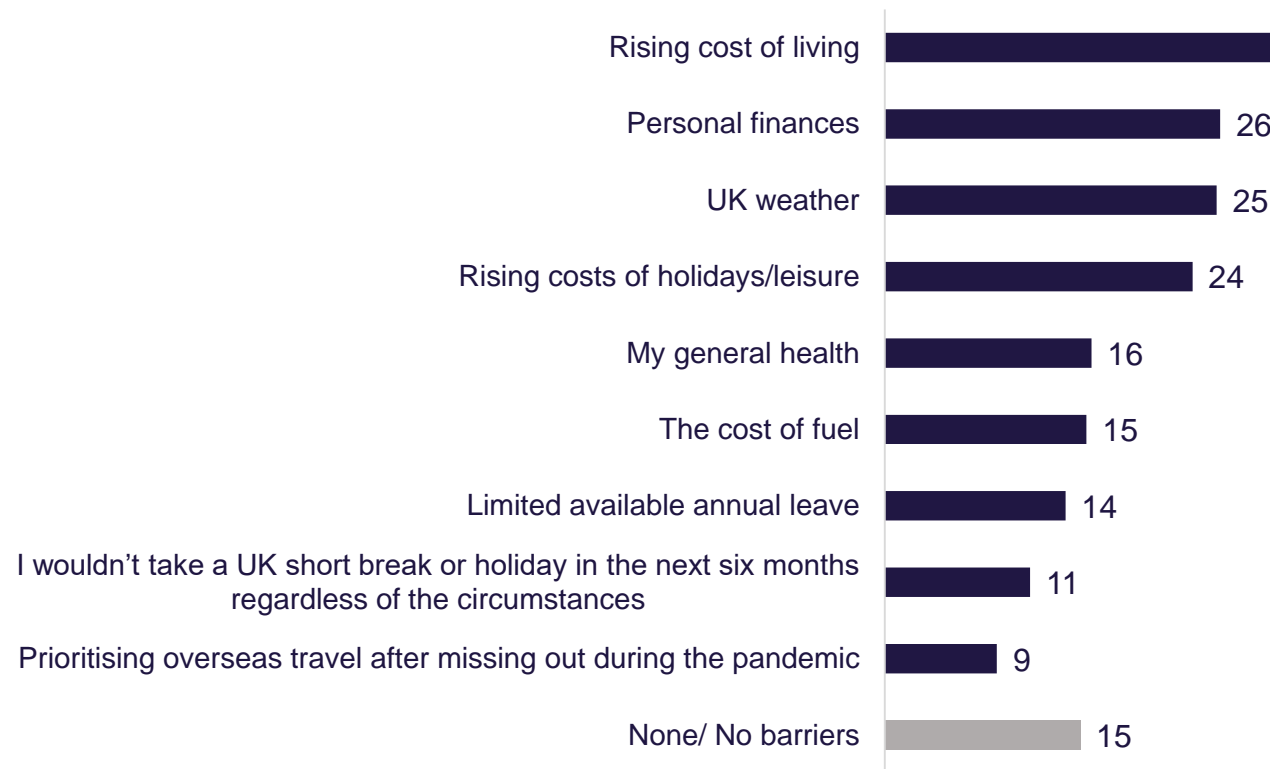
1. Better weather (48%)
2. I want to visit new places/experience new cultures (40%)
3. Overseas holidays are cheaper (31%)
4. I'm prioritising overseas trips after missing out in the last few years (25%)
5. To visit friends and relatives (16%)

FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.

Question: VB2j. Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months? Base: All respondents. September 2023 = 1,756. VB2k. Why are you more likely to choose a UK trip than an overseas trip? September 2023 = 637 VB2l. Why are you more likely to choose an overseas trip than a UK trip? September 2023 = 454

The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ (36%), followed by ‘personal finances’ (26%) and ‘UK weather’ (25%).

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



	June 2023 data	July 2023 data	August 2023 data	September 2023 data
NET: Costs and finances	57%	60%	60%	57%

FOR THE FULL LIST OF BARRIERS, PLEASE SEE THE PUBLISHED TABLES.

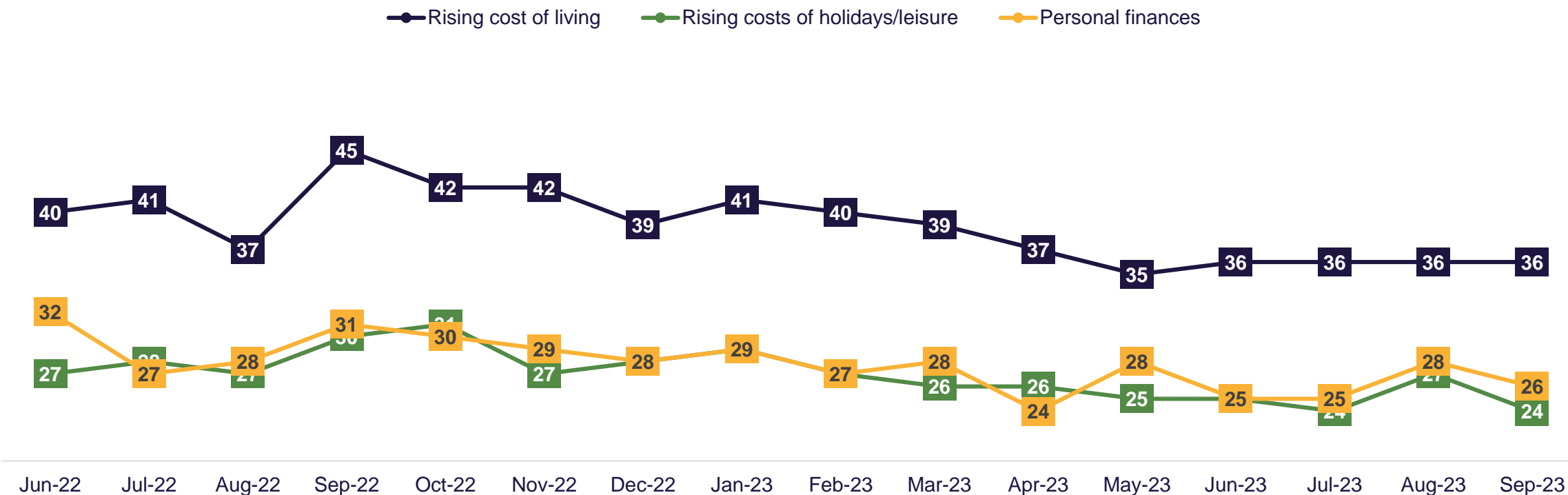
Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months? .

Base: All asked each question. September 2023 = 1,756. *NET: Cost and finances includes ‘rising cost of living’, ‘personal finances’, ‘the cost of fuel’,

‘rising costs of holidays/leisure’ and ‘difficulty getting money back if a trip is cancelled’

The 'rising cost of living' is the biggest financial barrier to taking an overnight domestic trip, and this has been consistent the last 4 months

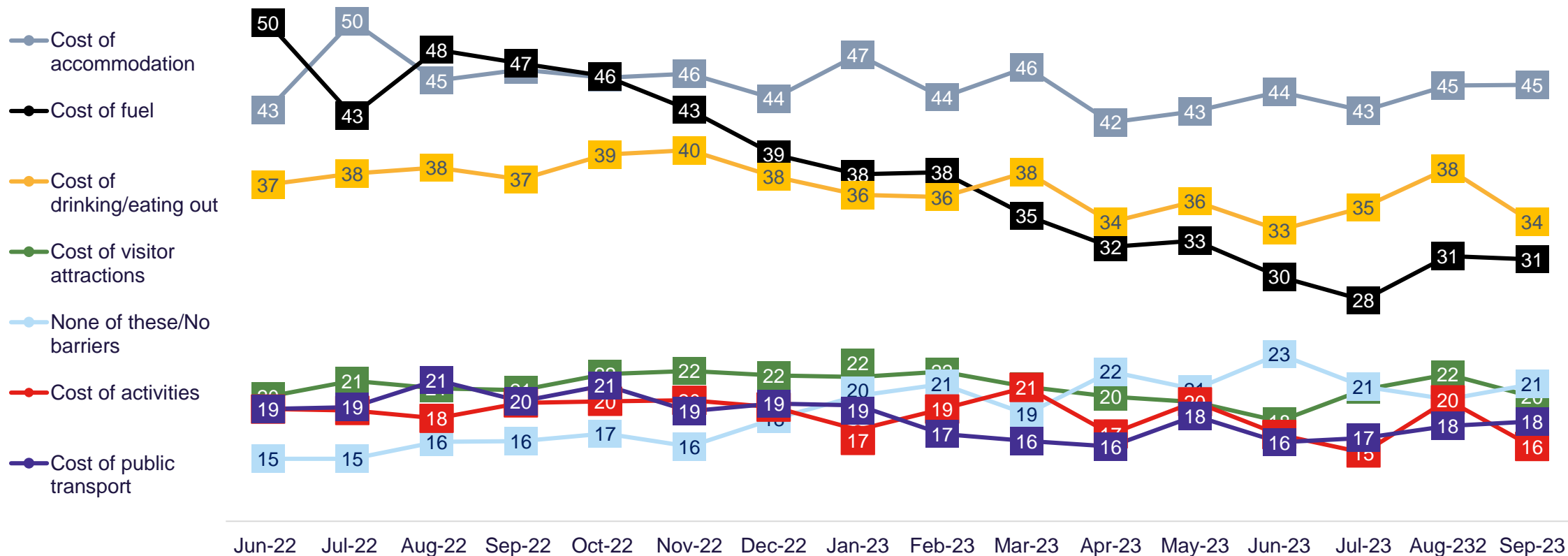
Figure 10b. Perceived financial barriers to an overnight trip in the UK in next 6 months, Wave-on-wave, Percentage, UK



Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
 Base: All asked each question. September 2023 = 1,756.

Focusing on barriers related directly to the cost of a domestic overnight trip, the 'cost of accommodation' remains at the top, followed by 'cost of drinking/eating out', albeit this has dropped

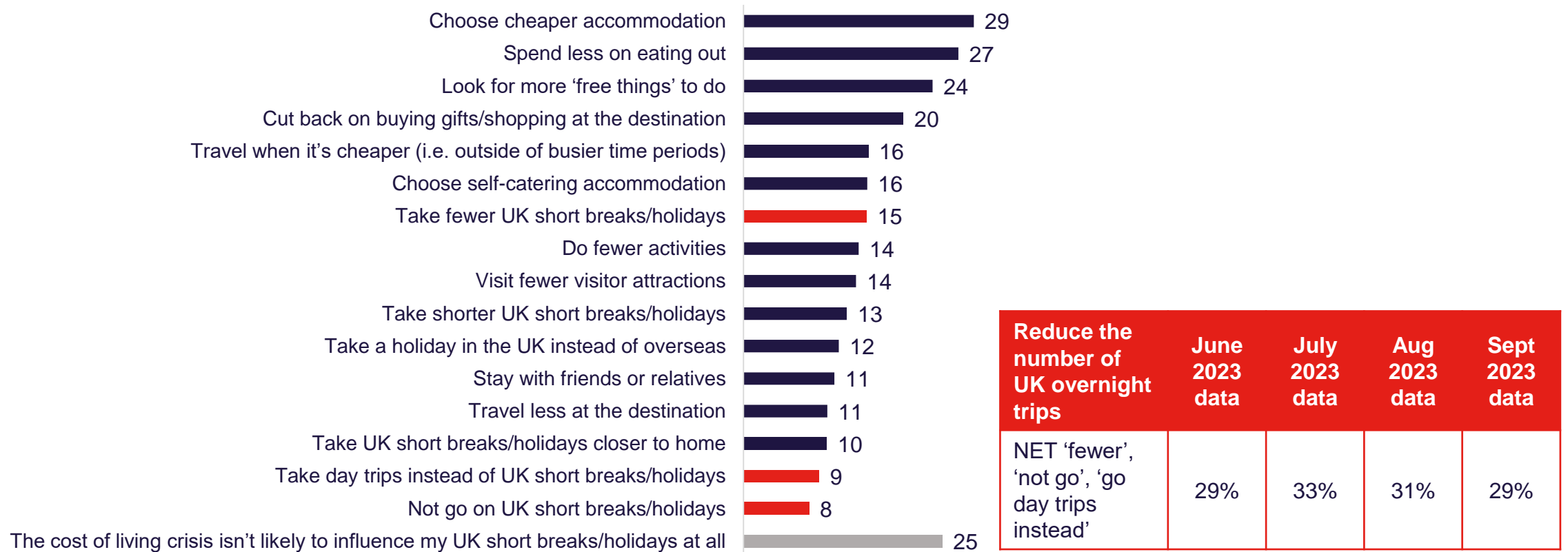
Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Wave-on-wave, Percentage, UK



Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
 Base: September 2023 = 1,756.

UK adults plan to cut their overnight trip spending mainly on accommodation, eating out and activities. 29% will cut the number of trips

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



Question: VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?

Base: September 2023 = 1,756.

In terms of UK day trips, 25% of UK adults intend to look for more free things to do. 32% will reduce the number of day trips – slightly below previous waves

Figure 13b. 'Cost of living' impact on day trips, Percentage, September 2023, UK, Full list

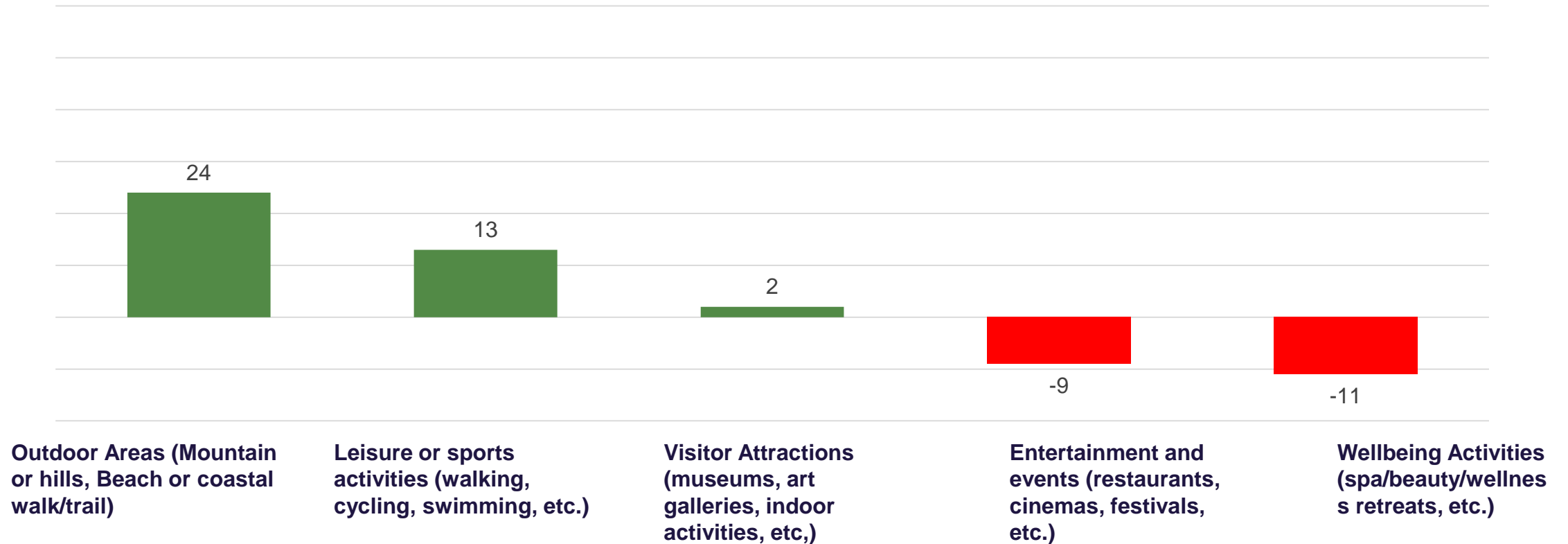


Reduce the number of day trips	June 2023 data	July 2023 data	Aug 2023 data	Sept 2023 data
NET 'fewer', 'not go on day trips'	33%	34%	34%	32%

Question: VB7Cii. How, if at all, would you say the 'cost of living crisis' is likely to influence your day trips in the next few months?
 Base: September 2023 = 1,756.

Over the next 12 months, UK adults are more likely to visit outdoor areas and practice leisure or sports activities, and are less likely to attend entertainment activities and wellbeing activities

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



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

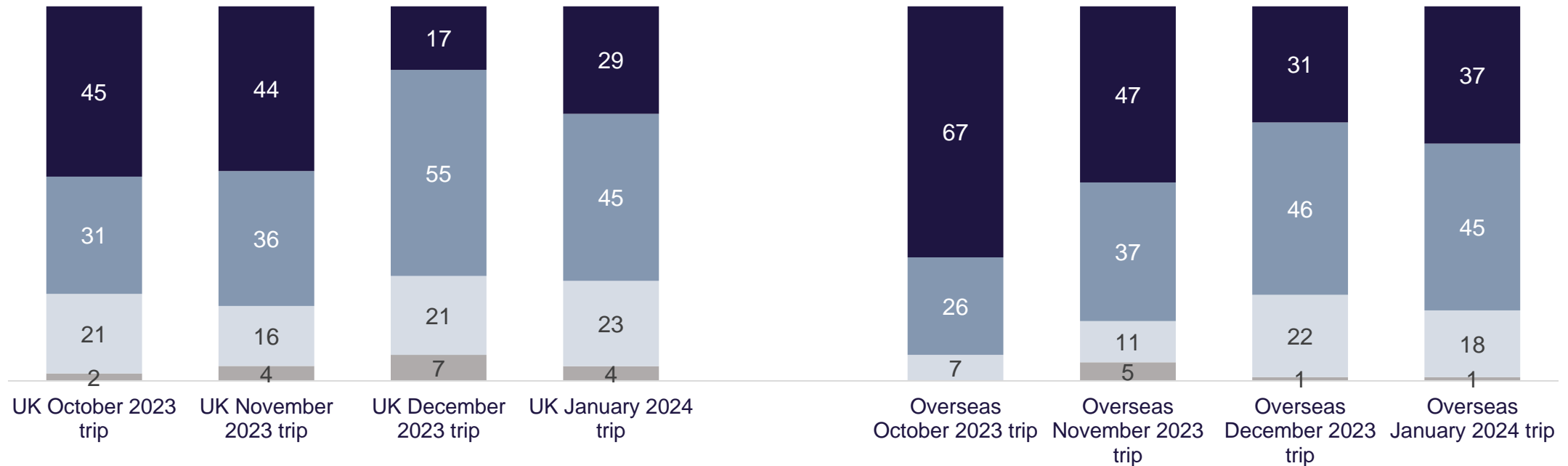
Base: September 2023 = 1,756.

3. The Next Trip: Overnight and Day Trips

45% of UK adults have already booked their domestic trips for October, while 67% have already booked their overseas trips for that month

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

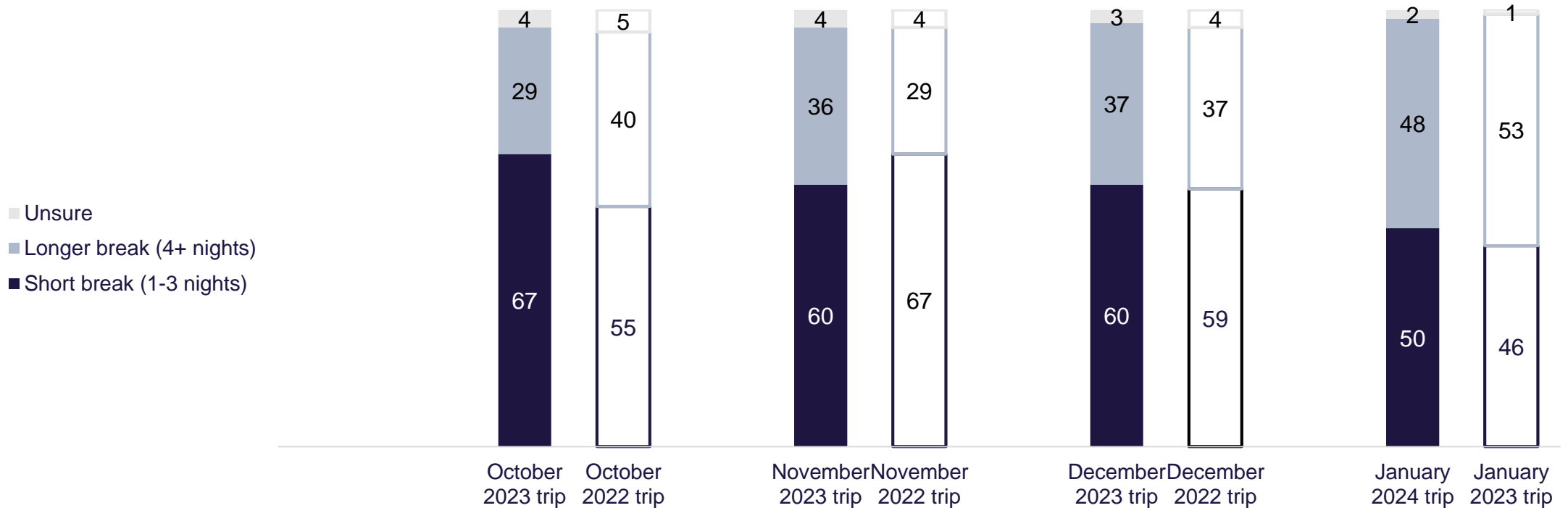
■ I have already booked the trip ■ I have decided where to go but not yet booked ■ I am yet to decide where to go ■ I am undecided whether I will take this trip at all



Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: October 2023 n = 250, November 2023 n = 123, December 2023 n = 138, January 2024 n = 79. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: October 2023 n = 123, November 2023 n = 90, December 2023 n = 91, January 2024 n = 64.

Short breaks are likely between October 2023 and January 2024, this is more likely than was reported in 2022

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



Question: QVB3. Is this next trip to <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)?
 Base: All September 2023 respondents intending to take next holiday or short break in each time period: UK trip 2023-2024: October 2023 n = 250, November 2023 n = 123, December 2023 n = 138, January 2024 n = 79

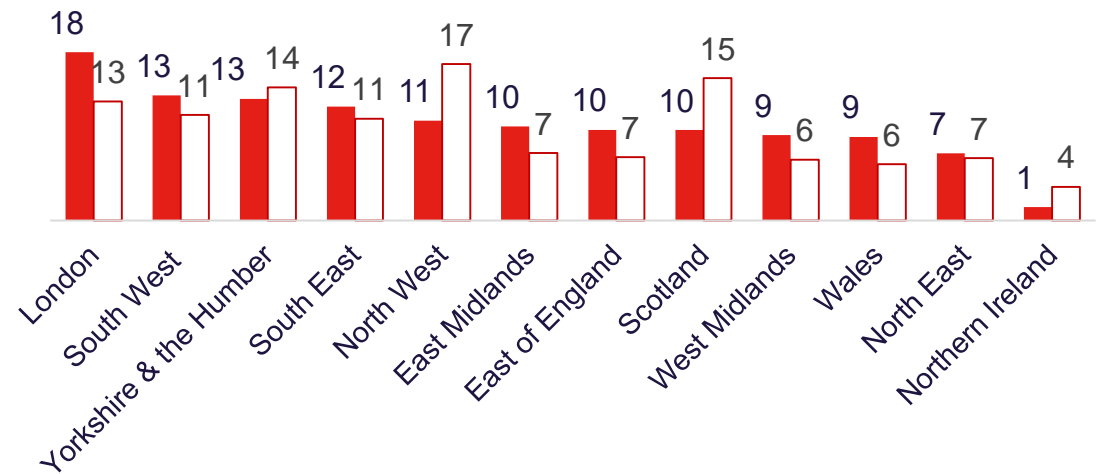
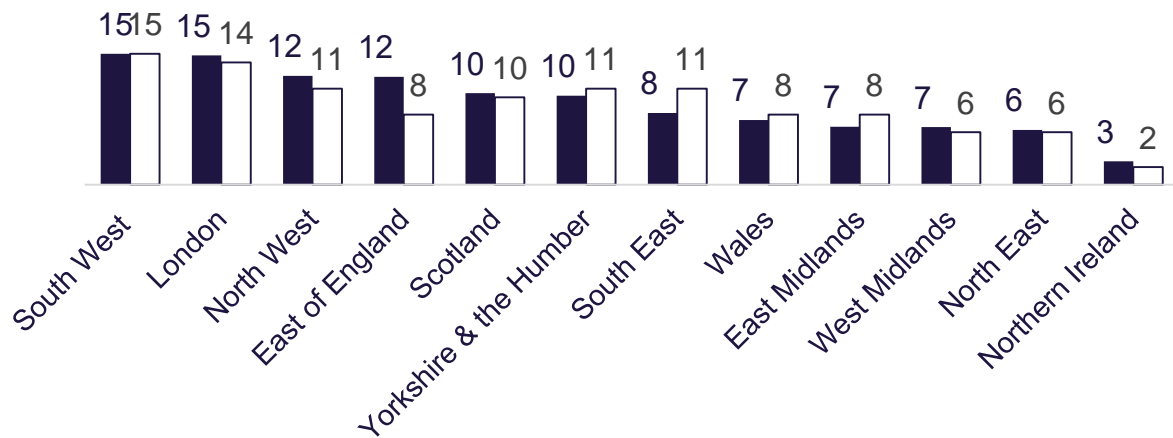
As in 2022, the South West is the most preferred UK overnight destination in October-December, while London leads for January-March 2024.

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

Figure 19. Where planning on staying on next UK overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK

■ August 2023/September 2023 data □ August 2022/September 2022 data

■ August 2023/September 2023 data □ August 2022/September 2022 data



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

Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

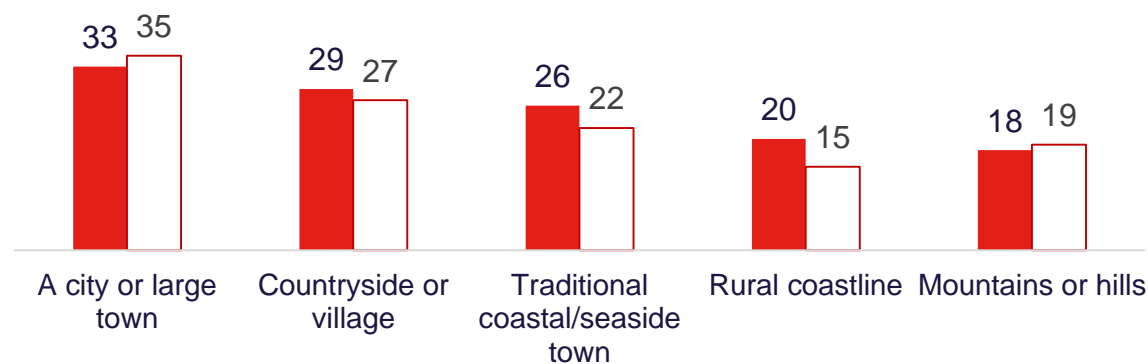
The top type of destination for overnight trips in both October-December 2023 and January-March 2024 is 'City or large town'

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

Figure 21. Types of destination for overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK

■ August 2023/September 2023 data □ August 2022/September 2022 data

■ August 2023/September 2023 data □ August 2022/September 2022 data



Question: VB5. Which of the following best describes the main types of destinations you are likely to stay in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.

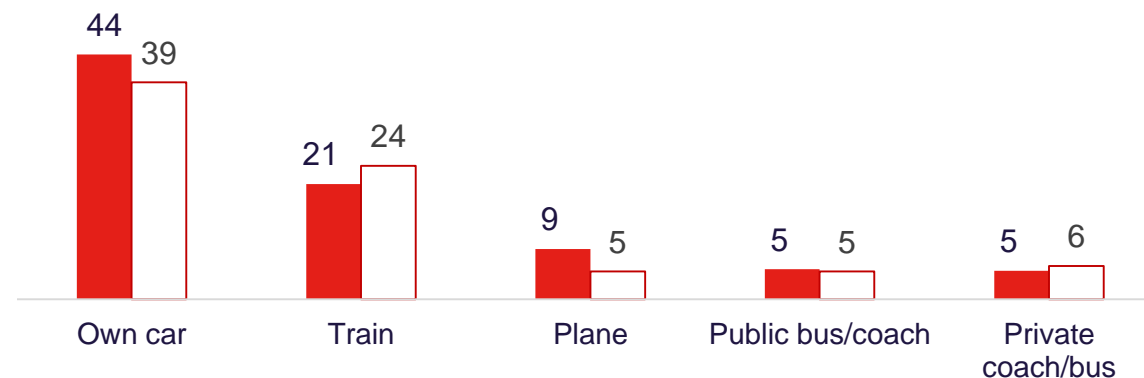
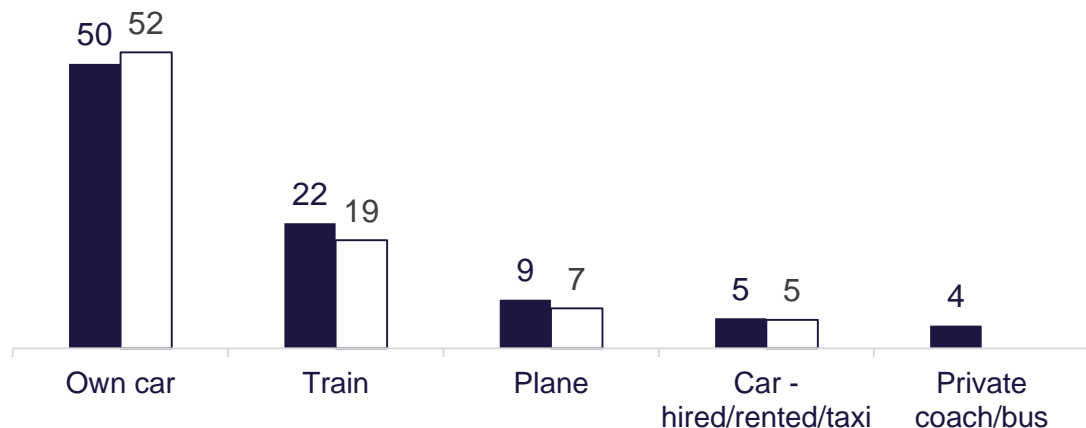
For both time periods, own car is the most common mode of travel, followed by train

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

Figure 23. Top 5 main modes of travel to destination for overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK

■ August 2023/September 2023 data □ August 2022/September 2022 data

■ August 2023/September 2023 data □ August 2022/September 2022 data



FOR THE FULL LIST OF MODES OF TRANSPORT, PLEASE SEE THE PUBLISHED TABLES.

Question: VB4c. What do you anticipate being the main mode of travel to your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2a>? Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.

For the next overnight trip in both time periods, 'hotel / motel / inn' is the leading accommodation type, followed by a 'friends or relatives' home' in October – December, while 'Guest house / B&B' is the second preference for January to March

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

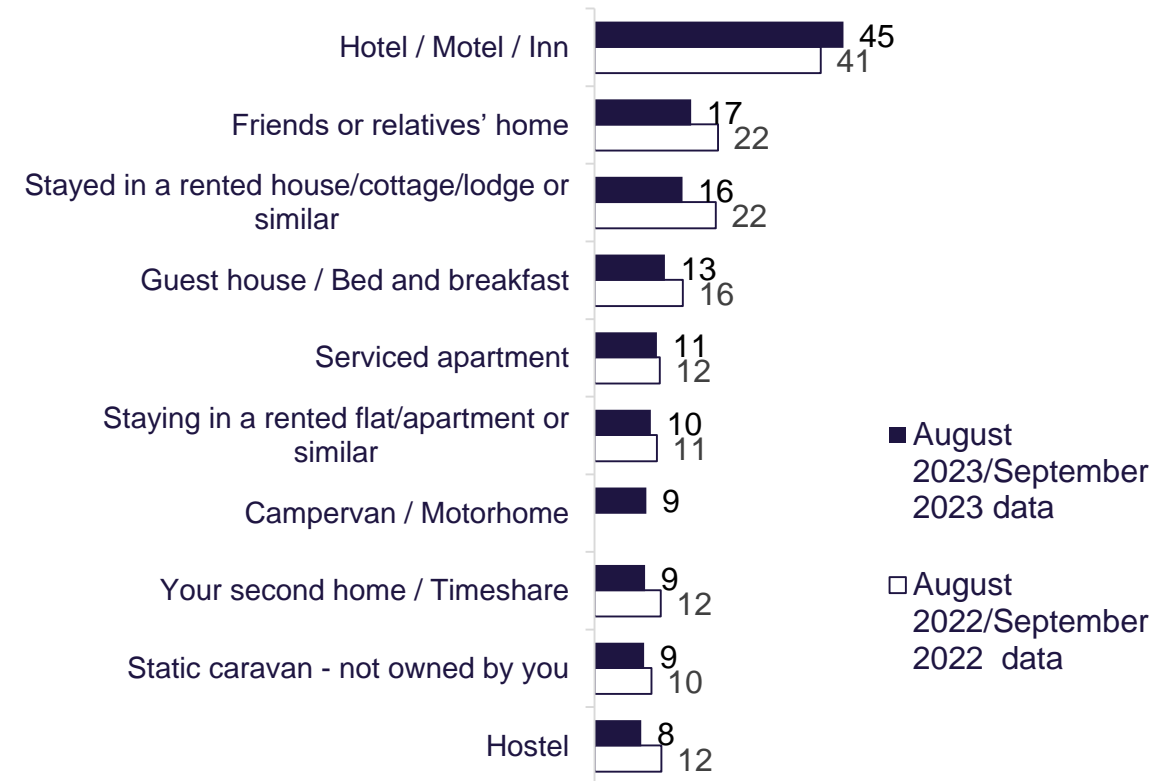
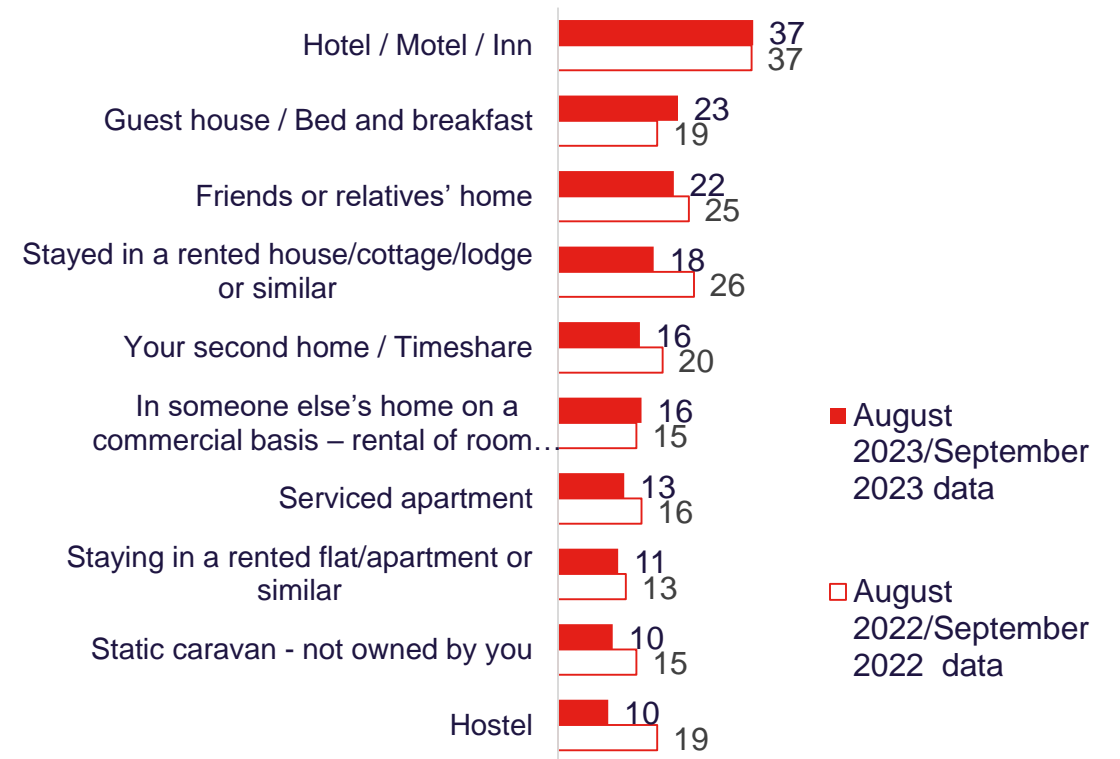


Figure 25. Top 10 accommodation types planning on staying in on next UK overnight trip in January to March 2024, Percentage, August 2023 and September 2023, UK



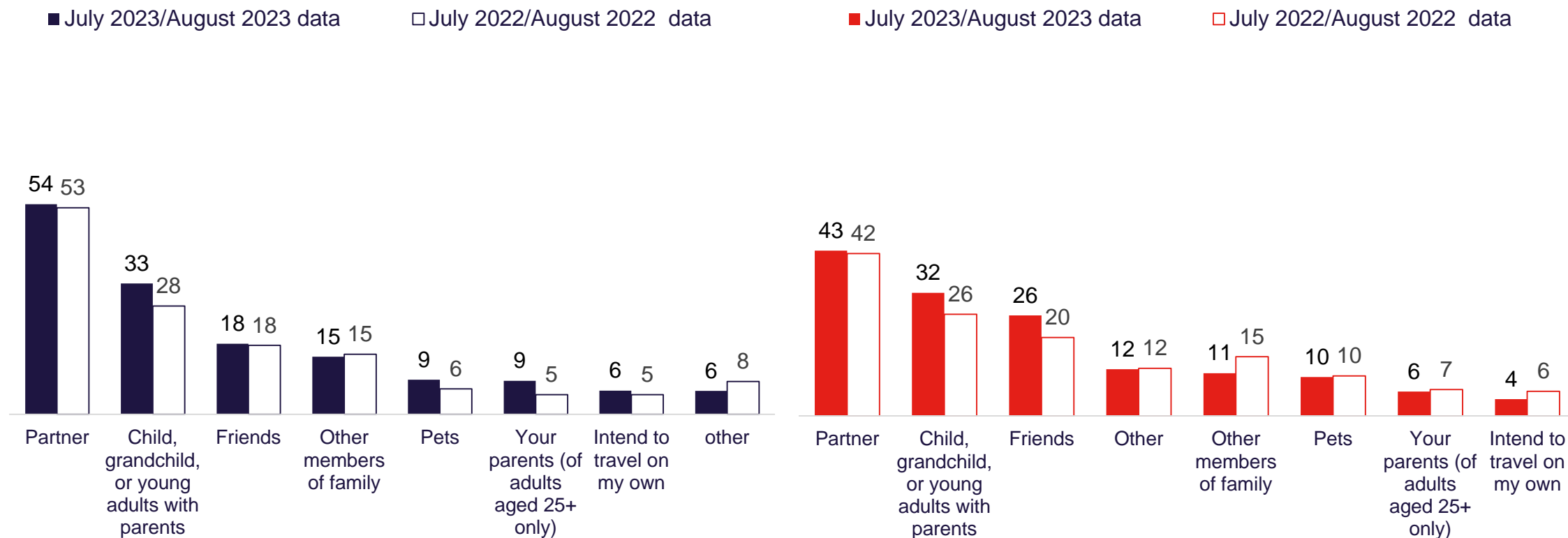
FOR THE FULL LIST OF ACCOMMODATION TYPES, PLEASE SEE THE PUBLISHED TABLES.

Question: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2A>? Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.

'Partner' is the most common companion on a trip during both time periods, followed by 'child, grandchild or young adult'

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

Figure 27. Visitor party make-up for trips taken from trip in in January to March 2024, Percentage, August 2023 and September 2023, UK



Question: QVB4d. With whom are you likely to spend your next UK holiday or short break in <INSERT DESTINATION FROM VB4A> in <INSERT MONTH FROM VB2a> ? Base: All August 2023 and September 2023 respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 737, January to March 2023 n = 302, October to December 2023 n = 890, January to March 2024 n = 344.

The top motivation for overnight trips both in October-December and January to March 2024 is ‘family time or time with my partner’, followed by ‘to get away from it all and have a rest’

Figure 28. Motivations for UK holidays and short breaks in October - December 2023, Percentage, September 2023, UK, Full list



Figure 29. Motivations for UK holidays and short breaks in January-March 2024, Percentage, September 2023, UK, Full list



Question: VB6fii. Which of the following best describe your motivation/s for this trip?

Base: All September respondents planning on taking a holiday or short break in the UK between October to December 2023 n = 511, January to March 2024 n =

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

In both October-December 2023 and January-March 2024, the top activity will be ‘trying local food and drink’

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

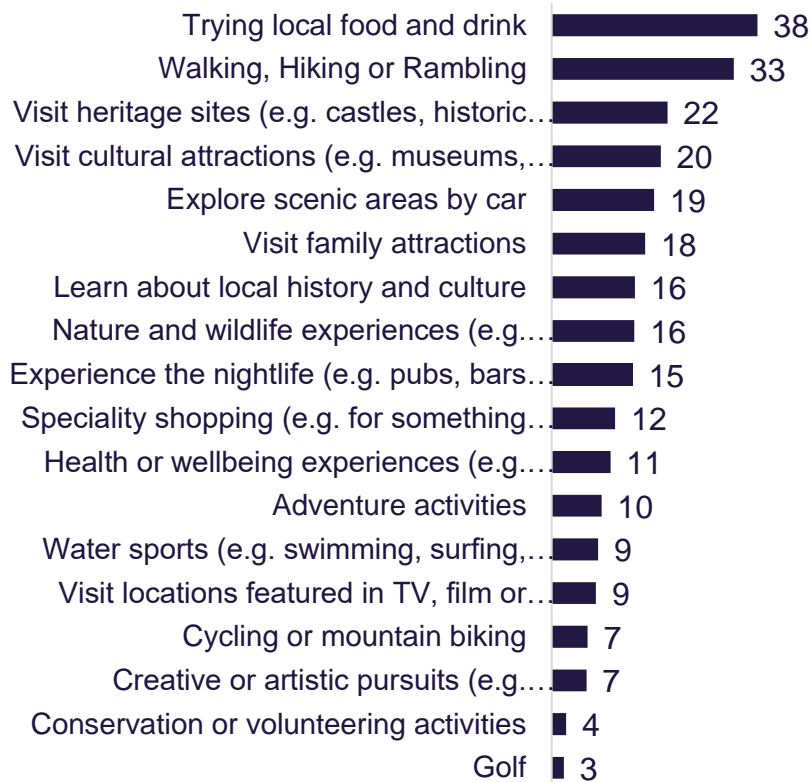


Figure 31. Activities for UK holidays and short breaks in January-March 2024, Percentage, September 2023, UK, Full list

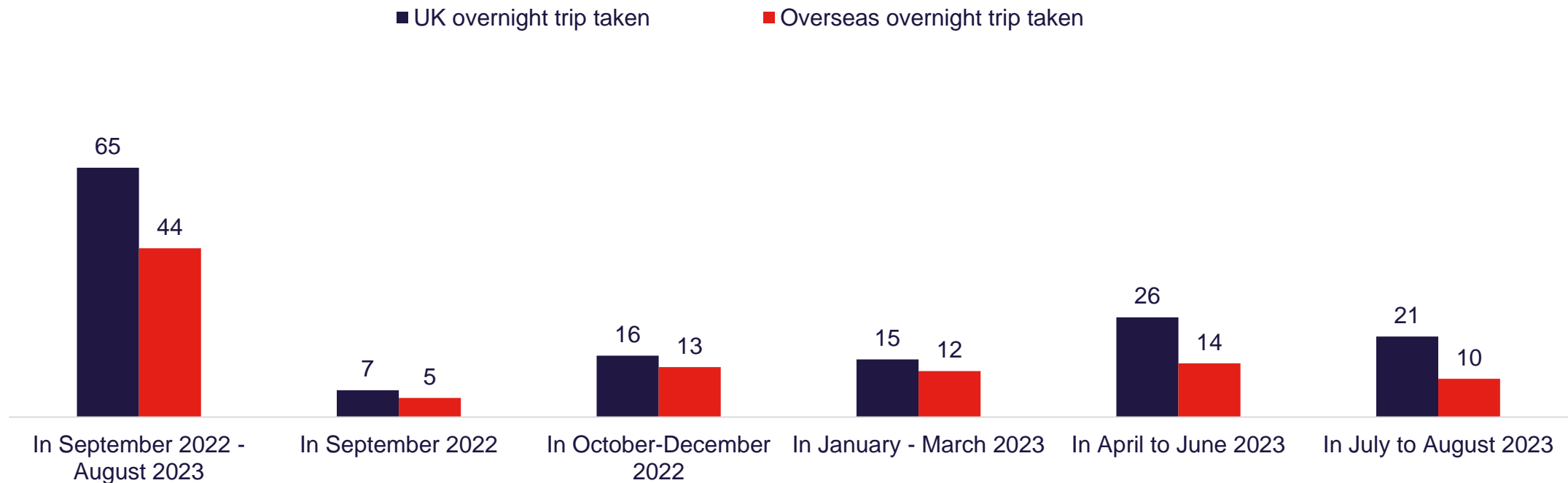


Question: VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <INSERT MONTH FROM VB2A>?
 Base: All September respondents planning on taking a holiday or short break in the UK between October to December 2023 n = 511, January to March 2024 n = 224.
 Note: Multiple choice question. Totals may exceed 100%.

4. Past UK and Overseas Trips

More than 3 in 5 (65%) have taken a UK overnight trip between September 2022 and August 2023, while 44% have taken an overseas overnight trip in that time period

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, September 2023, UK



Question: VB13a/f. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?

Base: All respondents. September 2023 = 1,756.

Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

South West was the most popular destination for domestic trips in the past three months and the main purpose was for holiday/leisure

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

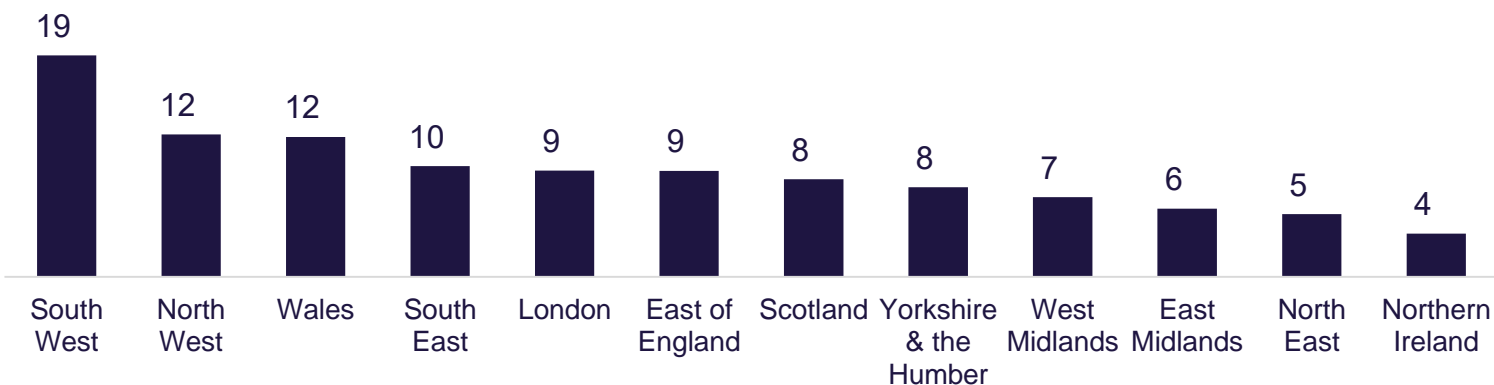
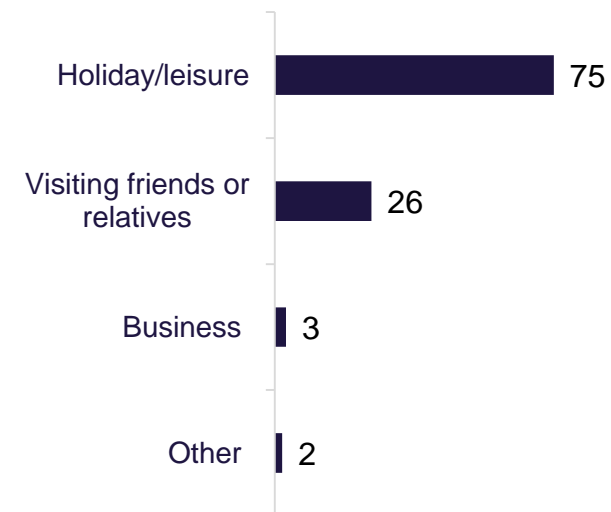


Figure 34. Purpose of overnight UK trip taken in the past three months, Percentage, September 2023, UK



Question: VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH >?

Base: All September 2023 respondents that took an overnight trips in the last three months n= 477

Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose

5. Overnight Business Trip Intentions (September 2023 data)

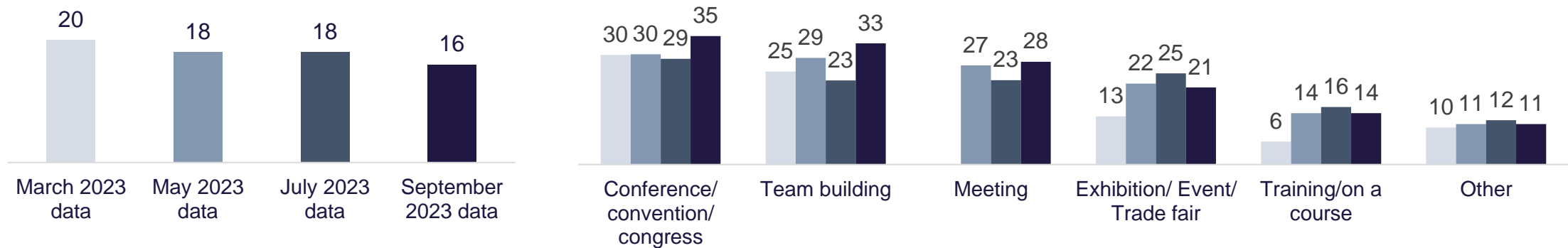
16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. 'Conference' is the leading reason (35%), followed by 'Team building' (at 33%)

Figure 35. Proportion anticipating an overnight business trip in next 3 months, Percentage, September 2023, UK adults in employment

Figure 36. Reasons for taking an overnight business trip in next 3 months, Percentage, September 2023, UK adults in employment planning a trip

■ March 2023 data ■ May 2023 data ■ July 2023 data ■ September 2023 data

81% of UK adults interviewed are in employment



Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer 'no'. Please also answer 'no' if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office). Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.

VB14b: What would be the main reason for this overnight business trip? Base: September 2023 respondents currently in employment n = 1,313. All taking a business trip n=298.



Methodology & Further Data

Methodology

- This report presents findings from the September 2023 wave of the Domestic Sentiment Tracker, with comparisons to previous months where appropriate.
- The survey is conducted online, among a sample of the UK adult population.
- In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

PLEASE NOTE:

- The current 6th phase of this project started in April 2023 and will run until March 2024.
- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis’ impact on trips intentions. It also covers the preference for domestic vs overseas overnight trips.
- Please note that as a result of the questionnaire updates, some questions are not comparable between this 6th phase and the previous phases / waves.

Master Data Table

- The full data tables are published on the VisitBritain website alongside this report and questions' data not shown in this report are available to view there: <https://www.visitbritain.org/domestic-sentiment-tracker>

Extra questions available in the tables are:

- VB1b. Likely to spend more, less or about the same on holidays in the next 12 months, vs last 12 months
 - VB9a/b. More/Less likely to visit leisure places in the UK in the next 12 months, vs last 12 months
 - VB10a/b. More/Less likely to conduct leisure activities in the UK in the next 12 months, vs last 12 months
- To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.

