

Overnight Domestic Travel: How was summer 2023?

UK Results

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Introduction

- VisitEngland have commissioned BVA BDRC to conduct an analysis of overnight trips taken in the UK this summer
- The research seeks to understand the proportion of UK residents that took an overnight short break or holiday in the UK in Summer 2023, with comparisons to 2022 and 2021, and the reasons for any differences
- This report seeks to answer this objective through a combination of direct and wider contextual information
- A broad range of data sources have been used to achieve the objective of this report, including:
 - **VisitEngland Domestic Sentiment Tracker**
 - **VisitEngland Occupancy Survey**
 - **VisitEngland Short Term Rentals Reports**
 - **BVA BDRC's Consumer Sentiment Tracker**
 - **BVA BDRC's Hotel Guest Survey**
 - **BVA BDRC's Holiday Trends 2022 Report**
 - **ABTA's Holiday Habits 2023-24 Report**
 - **Met Office data**
 - **ForwardKeys Flight Bookings Data**
 - **Conversations with representatives of tourism organisations (e.g. VisitCornwall)**

Not all data sources feature directly in the report, but all have been used to understand the broader travel context

Additional information about the project including full details of the methodologies used and deliverables are available on request.

Please contact jon.young@bva-bdrc.com to get this

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.

- **Summer Trip-takers:** Residents of the UK who have taken an overnight short break or holiday between July and September
- **Summer Intenders:** Residents of the UK who stated they intended to take an overnight short break or holiday between July and September
- **Summer Non-trip-takers:** Residents of the UK who did not take an overnight short break or holiday between July and September

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 with no children in household
- **Retirement age:** Aged 65+.



1. Key Findings

Key findings (1/2)

- A slightly higher proportion of the UK public took an overnight UK trip this summer (July to September 2023) compared to summer 2022, driven by higher trip-taking in September. However, when extending the time period the picture is more mixed, with June to August trips slightly down on 2023. The research also suggests that overnight trips were shorter than in 2022, and that the public were anticipating cutting back on spending on their domestic trips – in particular on eating out and accommodation. Together, these findings suggests a domestic summer that was at best in line with 2022, but potential down on 2022.
- Despite a relatively flat picture overall, a clear trend identified within this research is the steadily declining proportion of ‘pre-nesters’ taking domestic summer trips (22% in 2023 compared to 32% in 2021) and a decline in Retirement Age’ doing so (rising from 27% to 37%) – the latter driving September trip-taking.
- The South West of England was the region of the UK most likely to be stayed in this summer, but was also the only region to experience a significant drop in summer trip-takers against 2022 – a drop that was largest in Cornwall (Devon consistent with 2022).
- A notable feature of this year’s research is ‘the domestic intention gap’ (the difference between trips intended and trips taken) which was at its highest point to date this summer – 42% of ‘summer intenders’ not ending up taking the trip they planned. The intention gap was particularly high amongst life stages of ‘working age’ – lowest amongst Retirement Age.
- The size of the intention gap may relate to a trend towards last-minute booking – only 3 in 10 intenders having booked their trip at the start of the summer period – falling to 1 in 4 (23%) amongst pre-nesters and rising to 2 in 5 (40%) of Retirement Age. Last-minute booking is potentially problematic as it leaves tourism organisations vulnerable to undesirable circumstances such as poor UK weather, squeezed finances, more appealing options overseas or limited availability.

Key findings (2/2)

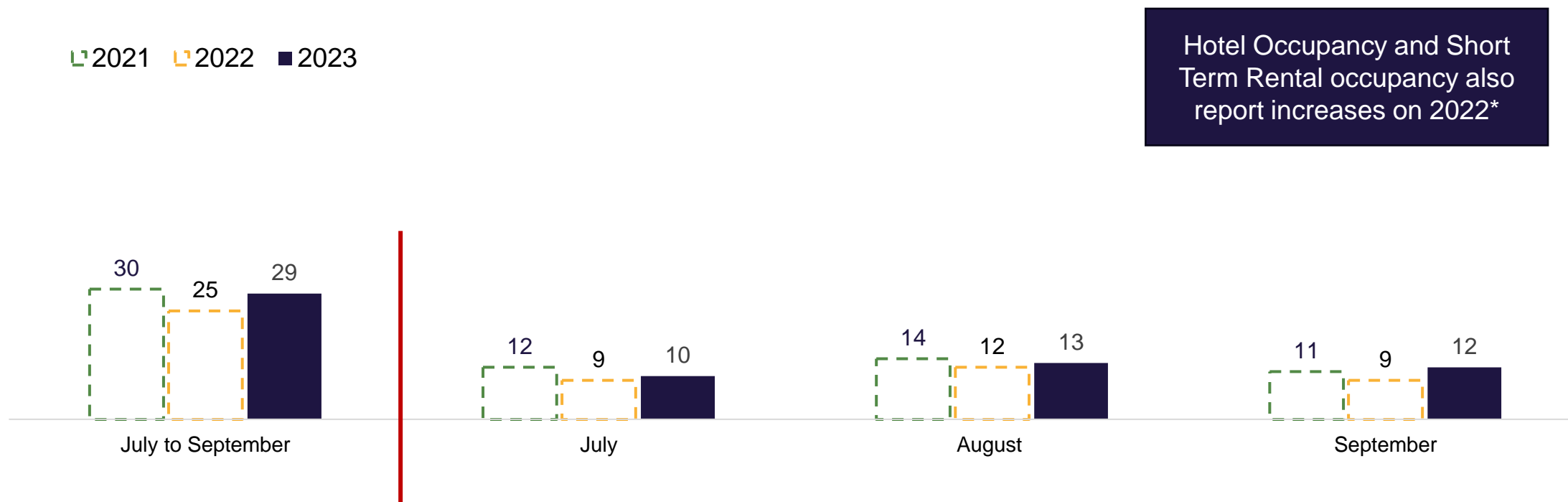
- A range of reasons were provided for not taking a planned summer overnight trip. 'Finances' was by far the most dominant, nearly half stating this, supported by data collected throughout the year, which indicated intenders would be cutting back on trip spending in a range of different ways. In addition to finances, a notable 1 in 8 stated they 'went overseas instead', and a similar proportion that they 'couldn't find anywhere available' – the latter particularly high amongst pre-nesters and families.
- The proportion stating 'went overseas instead' is supported by data showing an incremental increase in overseas travel – all 2023 months reporting more trips abroad than the equivalent period in 2022, compared to a more 'mixed' picture in the UK. Notably, the overseas 'intention gap' is considerably lower than the UK equivalent. This may be linked to longer overseas booking lead times, making a UK cancellation more likely in the event of residents needing to cut back.
- Whilst UK weather is likely to be a barrier to UK trips in any year, summer 2023 was considerably wetter than 2022, suggesting it may have been a factor in putting off last-minute bookers from taking a trip – particularly for pre-nesters and families, who are most likely to fall into this category.
- 'Lack of availability' should also be noted as a key factor driving down trips, perhaps driven by an increase in inbound travel, business travel and associated higher hotel occupancy levels.
- Looking ahead, the UK public continues to have a strong appetite for domestic travel. However, concerns around cost-of-living remain, and there is no evidence these will go away any time soon. The trend towards last-minute booking means domestic intention will continue to be vulnerable to financial concerns and a range of other factors. Financial incentives, and tactics to encourage more advance booking may help protect trip intentions.



2. Overnight domestic trip trends

The UK public took more 'summer' overnight trips in 2023 than in 2022, levels broadly in line with 2021. The biggest rise in trips was in September

Figure 1. Proportion of UK summer trip-takers, Percentage, October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker

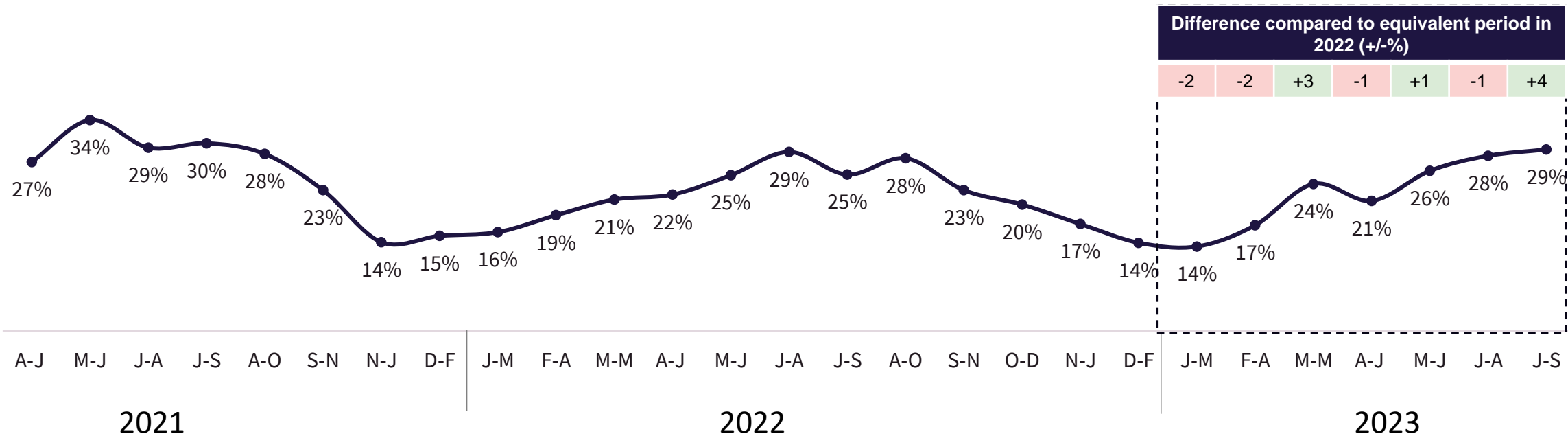
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?

Base: All respondents. October 2023 = 1,755; October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

*Hotel occupancy and short term rental are based on occupancy for all purposes and may include domestic and international stays

However, despite a positive summer, the picture is mixed when looking at all of 2023 (or even at June to August), with the rolling proportion of trips ‘down’ more often than ‘up’. This suggests the trend is relatively flat in comparison to 2022

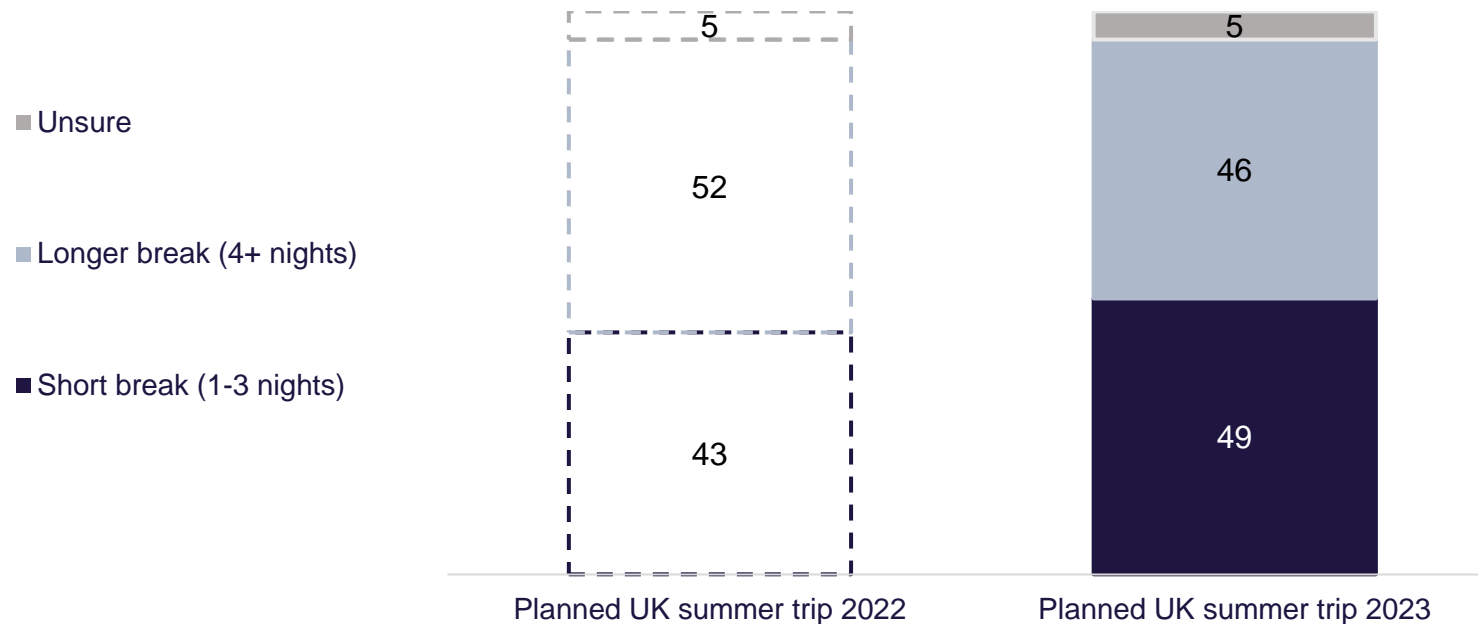
Figure 2. UK overnight trips taken in 3 month periods, Percentage wave-on-wave, UK



Source: VisitEngland Domestic Sentiment Tracker
 Question: QVB13a2. 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: n=c.1,750 each wave

Furthermore, 'trips taken' do not necessarily equate to similar 'trip spend' or 'trip length'. In July, summer 2023 intenders expected to take shorter trips than in 2022, suggesting that 'number of nights' may have fallen compared to 2022

Figure 3. Intended length of UK summer overnight trip, Percentage, July 2023 fieldwork, UK



★ ABTA Holiday Habits 2023-24 report also indicated UK residents took slightly fewer domestic trips in 2023 than in 2022 and 2021



Although the overall trend is flat, there are some big changes by life stage. Since 2021 the incidence of pre-nesters taking a summer domestic break has declined, with the ‘retirement age’ group increasing, and driving September growth. Family trips have also dropped since 2021, although are on a par with 2022

Figure 4. Overnight UK trips taken this summer by life stage, Percentage, October fieldwork, UK

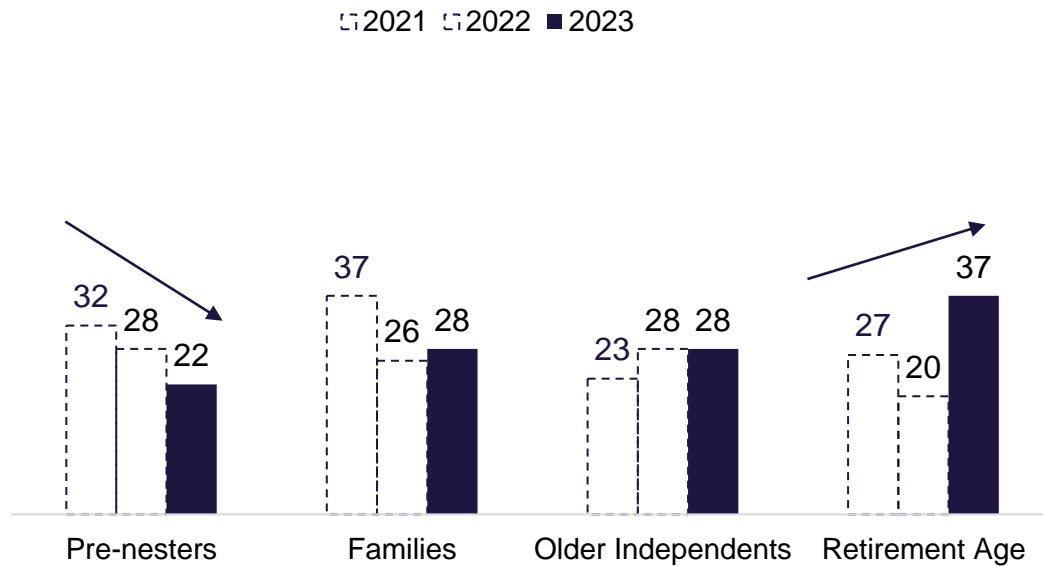
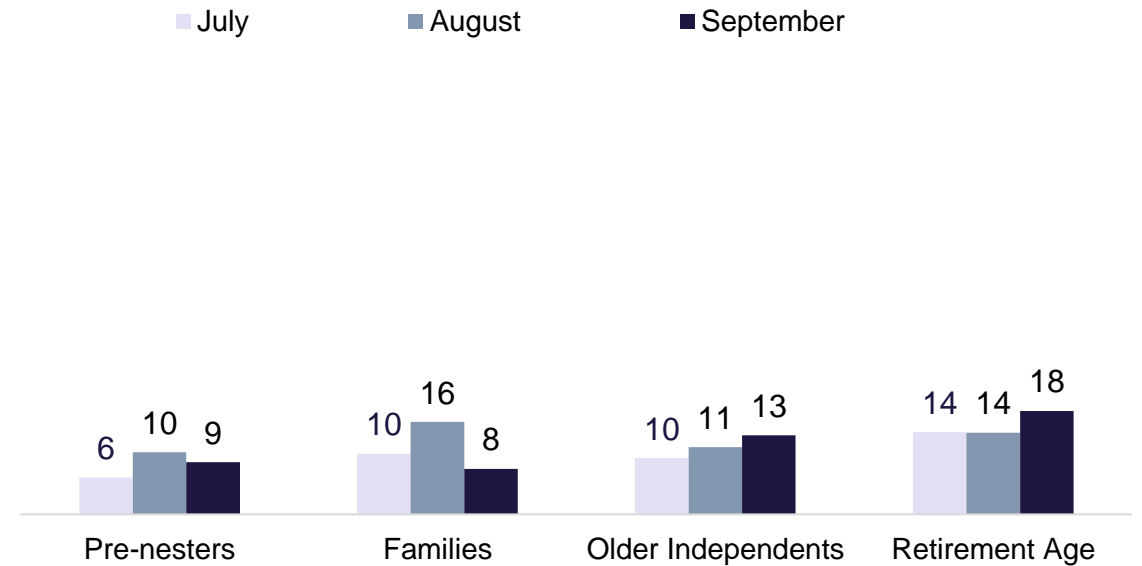


Figure 5. Overnight UK trips taken in each summer month by life stage, Percentage, October fieldwork, UK



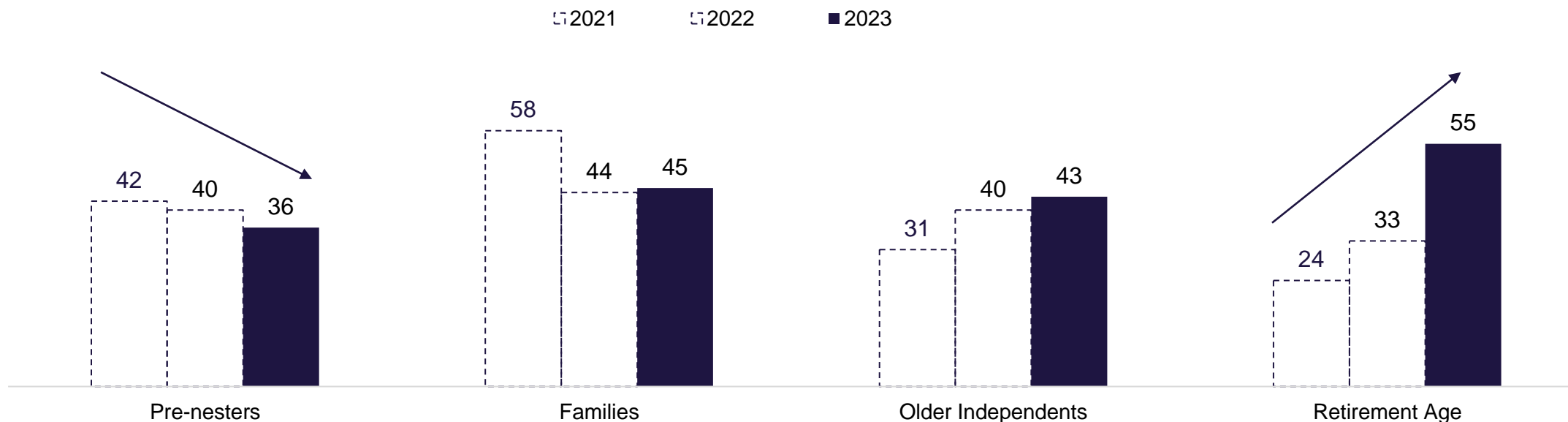
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

Base: All respondents. October 2023 Pre-nesters n=287; Families n=658; Older Independents n=474; Retirement Age n=336 October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirement Age n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirement Age n=219

The decline in summer domestic trips taken by pre-nesters and the increase amongst the Retirement Age group is also evident when extending the window to April to September – even more exaggerated amongst the Retirement Age group

Figure 6. Overnight UK trips taken between April and September by life stage, Percentage, October fieldwork, UK



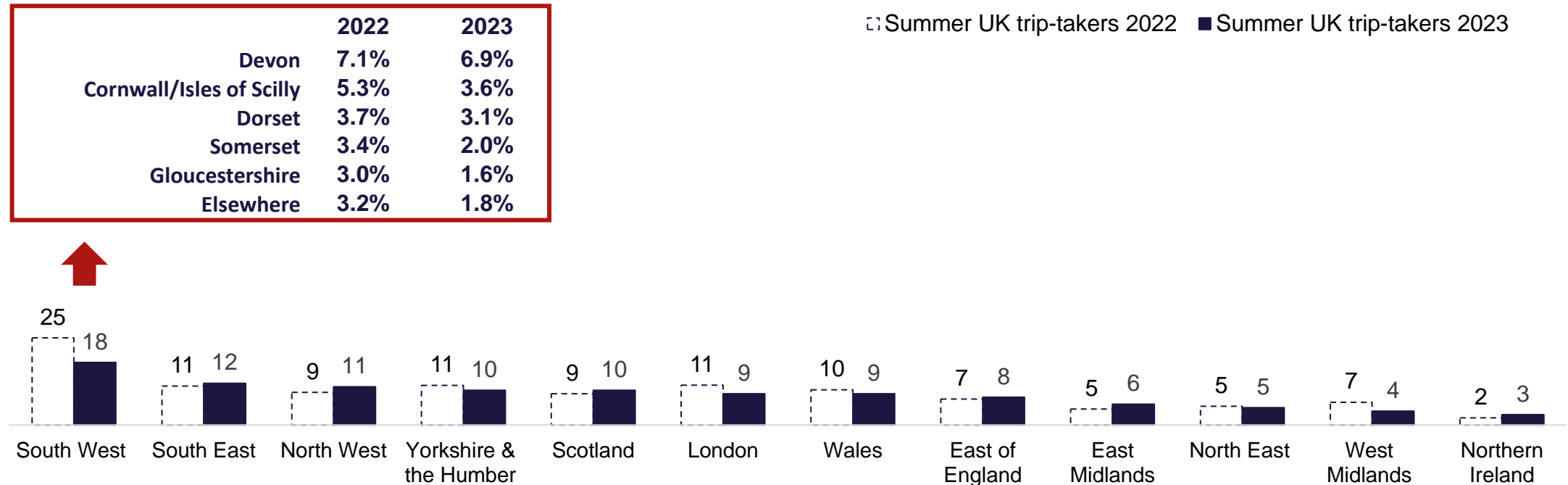
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

Base: All respondents. October 2023 Pre-nesters n=287; Families n=658; Older Independents n=474; Retirement Age n=336 October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirement Age n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirement Age n=219

The spread of domestic destinations stayed in summer 2023 is broadly the same as in 2022, with the notable exception of the South West of England, which has experienced a decline across the region, in particular in Cornwall / Isles of Scilly

Figure 7. Where stayed on most recent UK overnight summer trip, Percentage, October fieldwork, UK



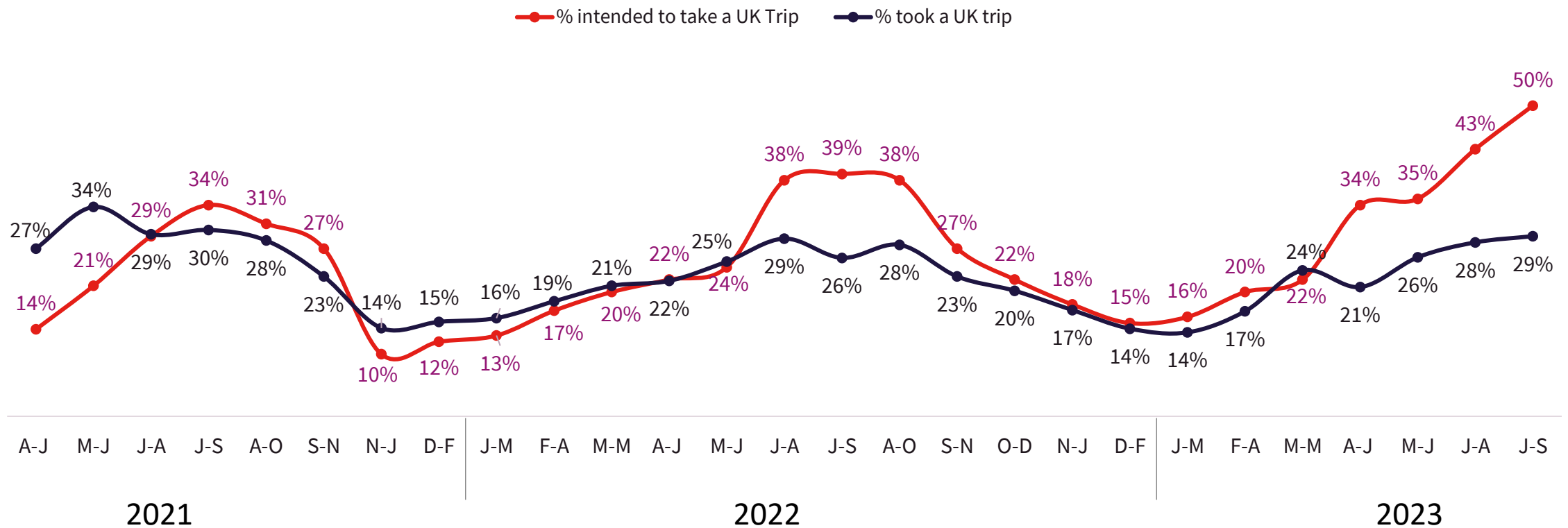
Source: VisitEngland Domestic Sentiment Tracker
 VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH FROM VB13A2>?
 Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
 Base: Summer 2022 n=686; Summer 2023 n=838



3. The intention gap

A key feature of this year's domestic research is the gradual increase in 'domestic trip intention' – demand was at its highest point (at 50%) for this summer. This suggests that the appetite for a domestic summer trip was strong, although nearly half of these 'intenders' did not end up taking a trip

Figure 8. Overnight UK trips planned/taken in 3 month periods, Percentage wave-on-wave, UK



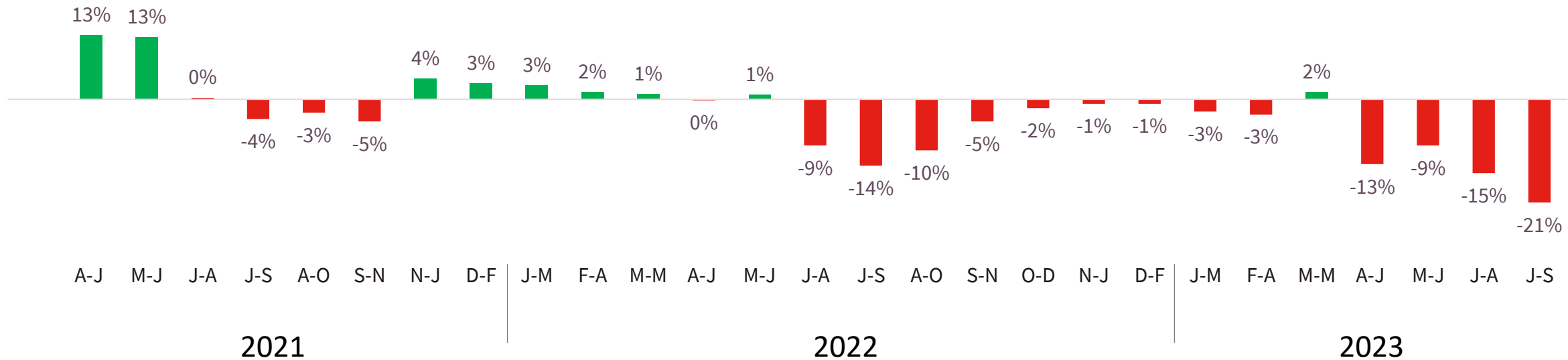
Source: VisitEngland Domestic Sentiment Tracker

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? Question: QVB13a2. 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: n=c.1,750 each wave

As alluded to on the previous page, a further notable feature of this year's research is 'the domestic intention gap' (the difference between overnight trips intended and trips taken). In summer 2023 (July-Sept), the intention gap was at its highest point to date, at -21%.

Figure 9. The 'intention gap' for overnight UK trips in 3 month periods (% intended to take a trip minus those who actually took a trip), Percentage wave-on-wave, UK



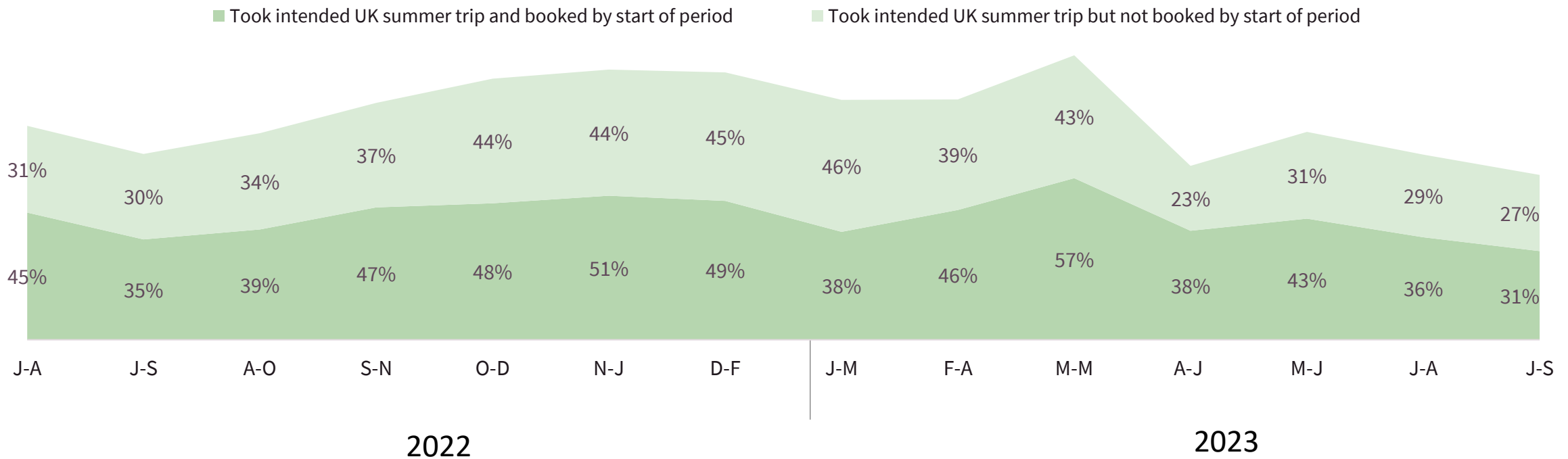
Source: VisitEngland Domestic Sentiment Tracker

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? Question: QVB13a2. 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: n=c.1,750 each wave

A high intention gap is perhaps driven by trip ‘booking status’ at the start of the intended period. At the start of summer 2023, the proportion that had booked their intended trip was lower than any period– the next lowest summer 2022. This suggests the public are least likely to follow through on intentions in peak summer months

Figure 10. Booking status of domestic overnight trips planned at the start of each 3 month period, Percentage wave-on-wave, UK



Source: VisitEngland Domestic Sentiment Tracker

Question: QVB2eNEW.Which of the following best describe how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)>?

Base: All intenders for each period July to September 2023 n=838

The 'intention gap' is evident across all life stages. However, it is lowest amongst 'Retirement Age', who are also the life stage most likely to have already booked their summer trip by the start of the summer period – pre-nesters are the least likely to have done so

Figure 11. Overnight UK trips taken compared to trips intended by life stage, Percentage, October fieldwork, UK

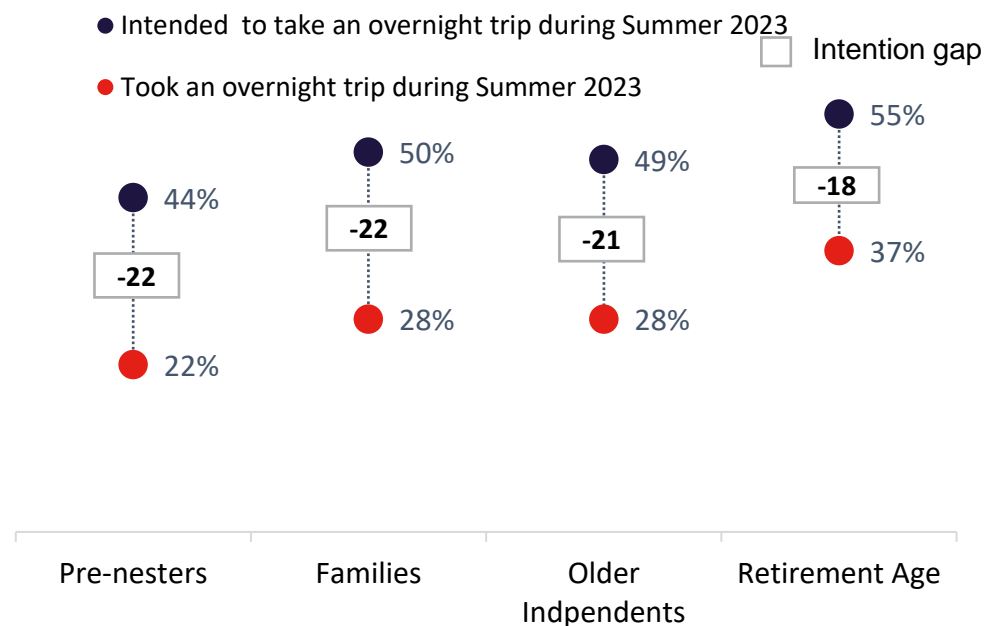
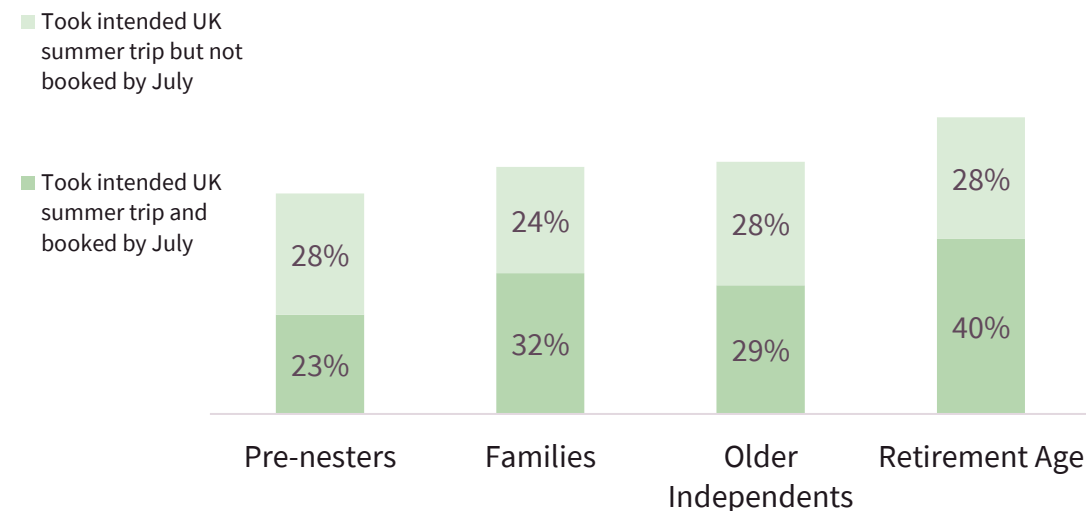


Figure 12. Booking status of trips planned at the start of each 3 month period by life stage, Percentage wave-on-wave, UK



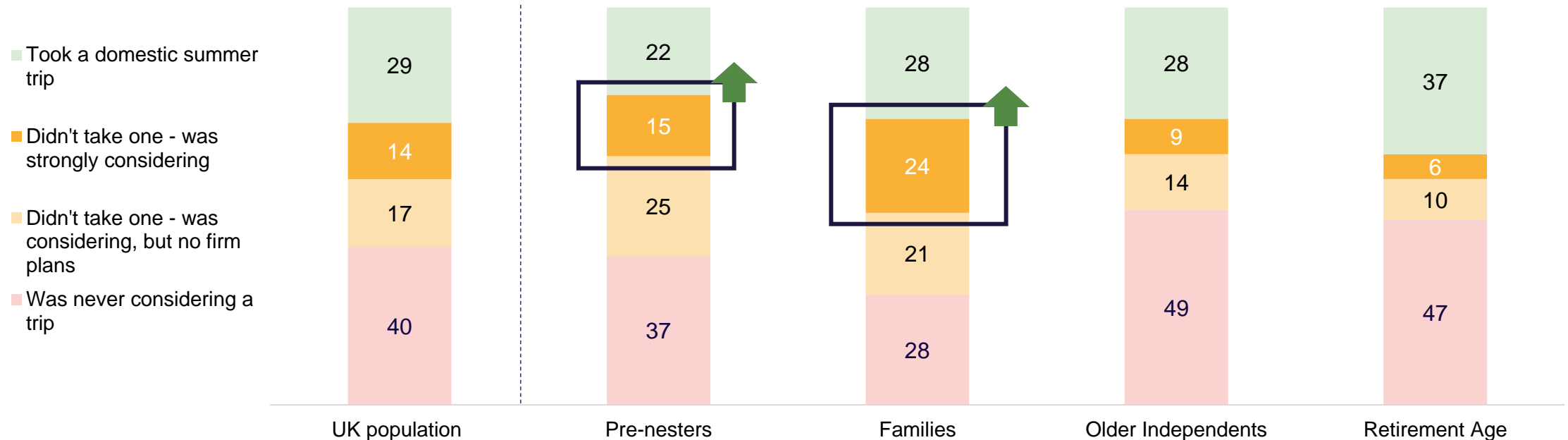
Source: VisitEngland Domestic Sentiment Tracker

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? Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? QVB2eNEW. Which of the following best describe how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)>?

Base: Figure 16: Pre-nesters n=362; Families n=710; Older Independents n=451; Retirement Age n=232; Figure 17 Pre-nesters n=162; Families n=348; Older Independents n=204; Retirement Age n=124

Around 1 in 7 non-summer trip-takers were strongly considering taking a UK overnight trip between July and September – highest amongst pre-nesters and families, suggesting they were the life stage most likely to have faced barriers to doing so

Figure 13. Domestic trip consideration amongst non-summer trip-takers overall and by life stage, Percentage, November fieldwork, UK all non-summer trip-takers



Source: VisitEngland Domestic Sentiment Tracker

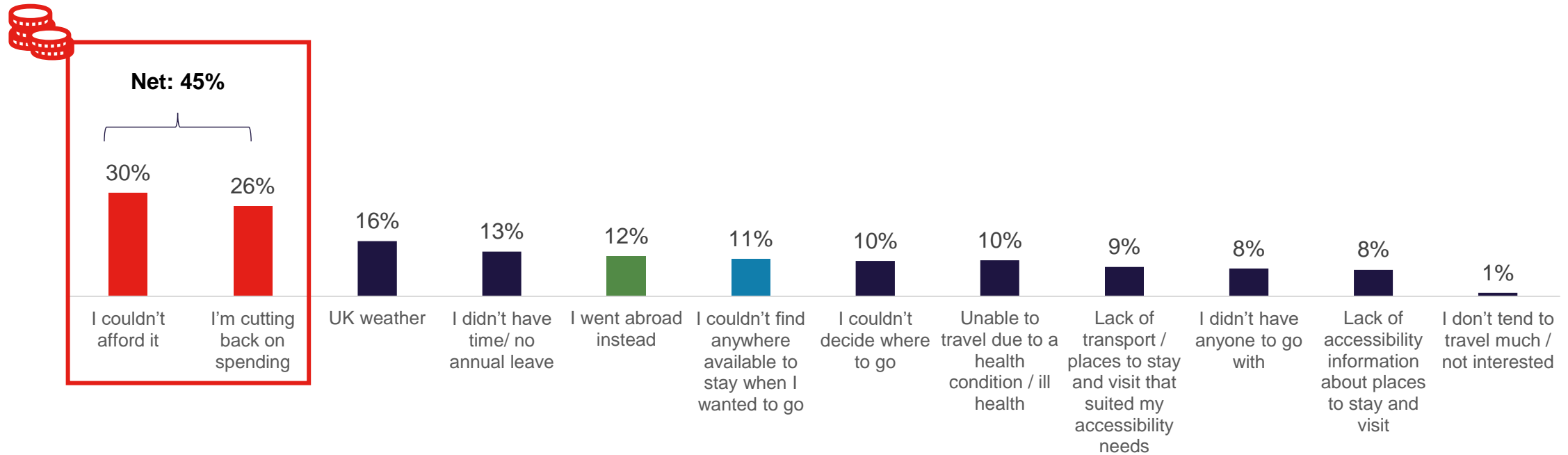
Question: VB13hW53: You indicated that you did not take an overnight short break or holiday in the UK during the summer months this year (July, August, September).

Did you originally intend to take a trip during those months?

Base: All Summer non-trip takers n=1,161

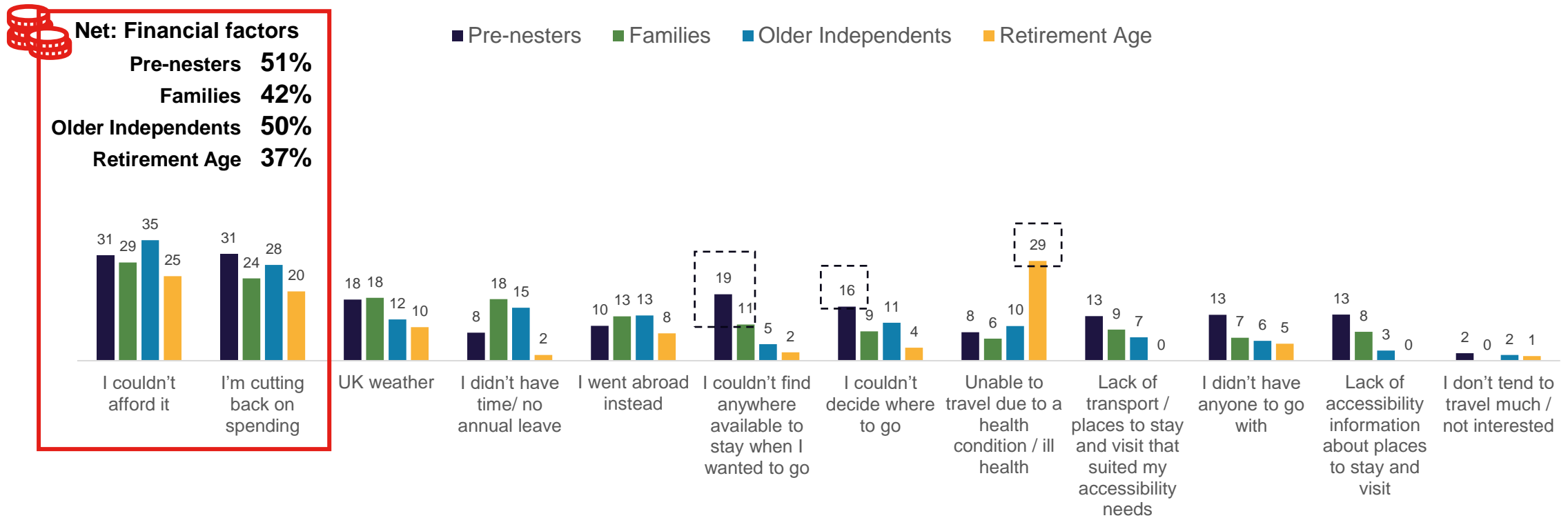
The leading reasons summer non-trip-takers did not take a trip (despite originally intending to) were financial – nearly half stating this. Other notable reasons include ‘going abroad instead’ (12%) and ‘I couldn’t find anywhere available’ (11%)

Figure 14. Reasons for not taking a UK overnight trip despite originally intending to do so, Percentage, UK summer non-trip-takers originally considering a trip



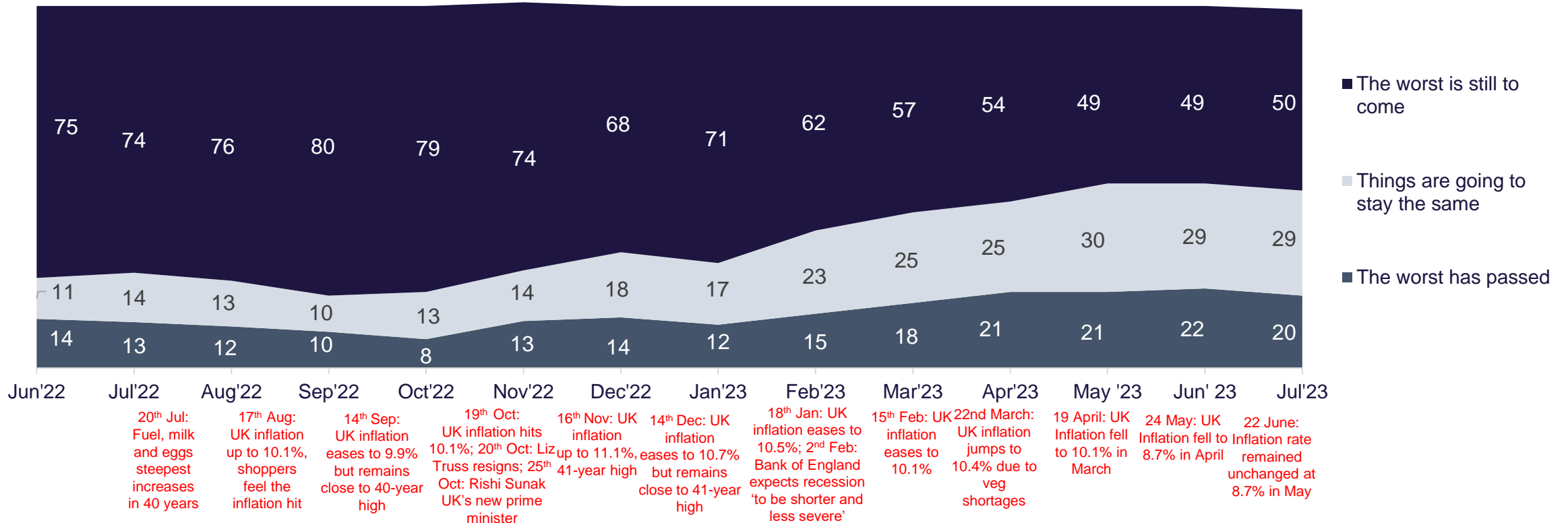
Finances were a leading reason for all life stages not taking a summer trip for, although least amongst Retirement Age. Other reasons differed, notably with pre-nesters, and to a lesser extent families, most likely to cite 'I couldn't find anywhere available'

Figure 14b. Reasons for not taking a UK overnight trip despite originally intending to do so, Percentage, UK summer non-trip-takers originally considering a trip



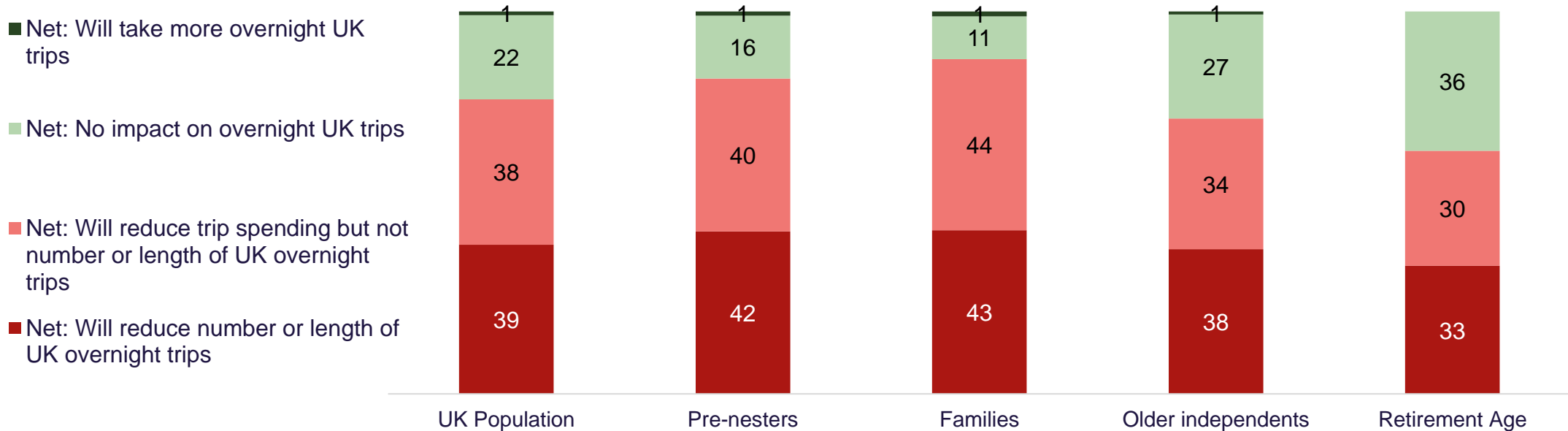
Whilst perceptions relating to the cost of living crisis were greatly improved compared to earlier in the year, financial concerns were still clearly front of mind as summer approached. At the start of July, 50% were thinking that ‘the worst is still to come’ and 3 in 10 ‘things are going to stay the same’

Figure 15. Perception of the situation with regards to cost of living crisis, Percentage wave-on-wave, UK



Financial concern was also conveyed with 2 in 5 anticipating that the ‘cost-of-living crisis’ would drive them to ‘reduce the number or length of domestic trips’ or to ‘reduce spending on the trips’ – both notably lower amongst Retirement Age

Figure 16. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Net



Source: VisitEngland Domestic Sentiment Tracker

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: UK population n=1,755; Pre-nesters n=362; Families n=710; Older Independents n=451; Retirement Age n=232



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3. The impact of overseas travel on domestic trips

When looking only at the summer period, there is minimal evidence that overseas travel is eroding domestic tourism – overseas summer trips remain relatively stable year on year and by life stage

Figure 17. Proportion taken an OVERSEAS overnight trip by time period, Percentage, October fieldwork, UK

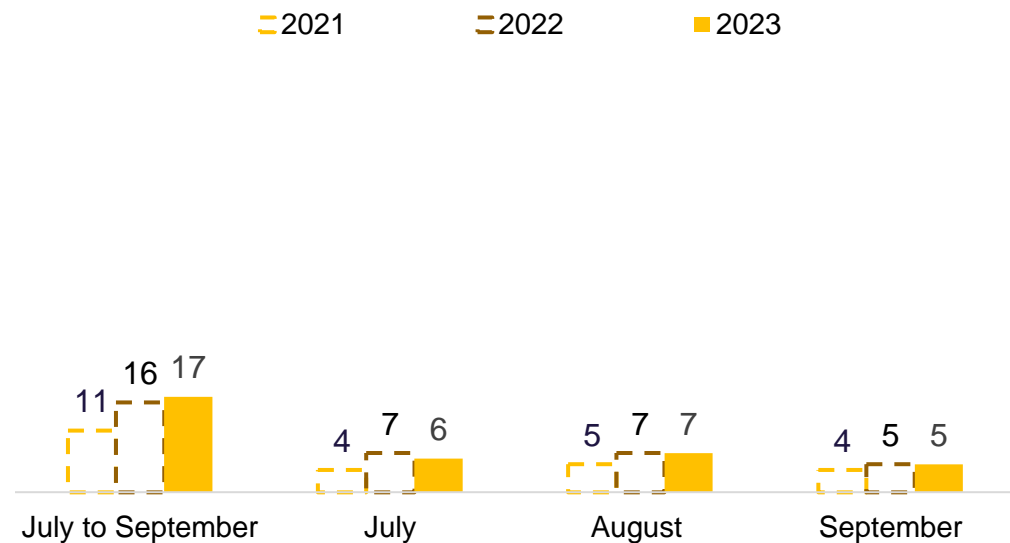
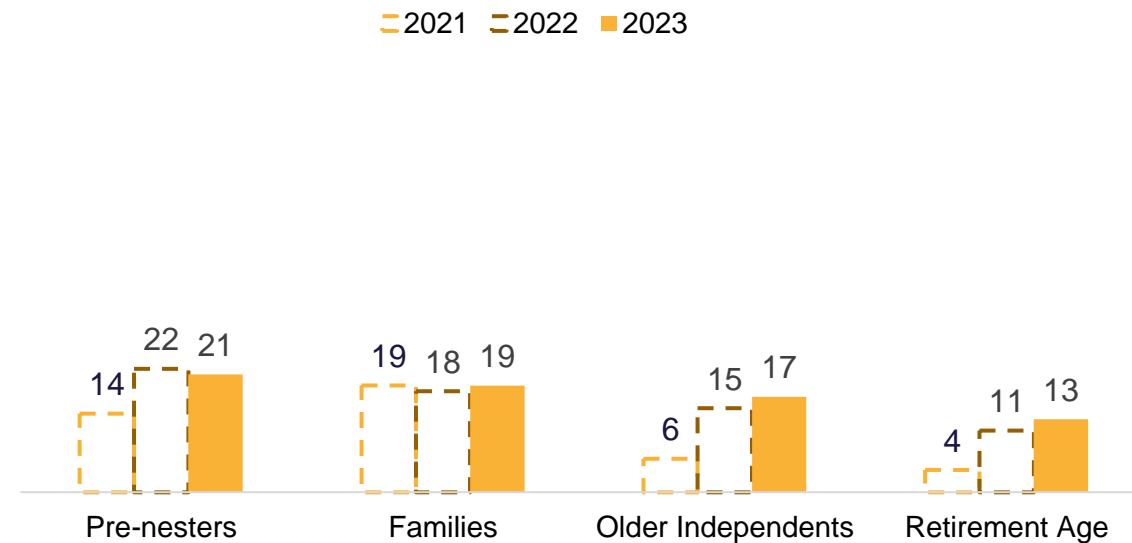


Figure 18. Overnight OVERSEAS trips taken this summer by life stage, Percentage, October fieldwork, UK



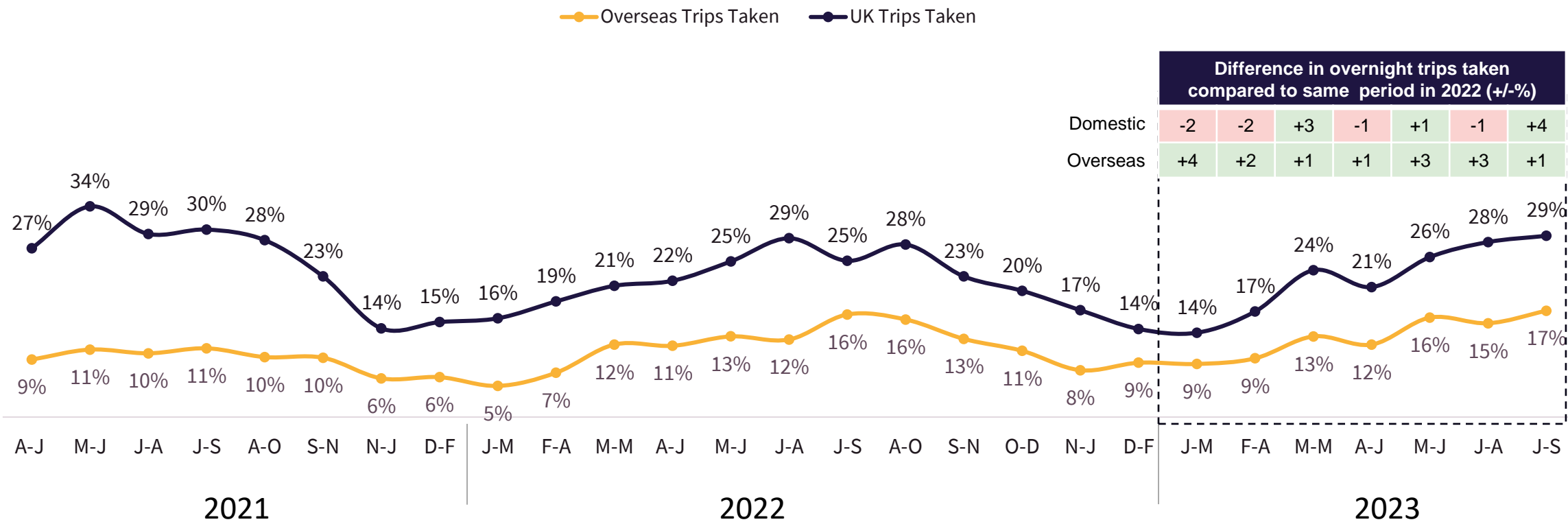
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2. In which of these months have you taken an overnight short break or holiday overseas in the last 12 months?

Base: All respondents. October 2023 = 1,755; October 2022 = 1,756, November 2021 = 1,758. October 2023 Pre-nesters n=287; Families n=658; Older Independents n=474; Retirement Age n=336 October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirement Age n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirement Age n=219 Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

However, when we extend the timeframe to the whole of 2023, we can see much larger jumps in overseas trip-taking than UK trip-taking, suggesting that overseas travel is increasingly accounting for a larger proportion of trip share

Figure 19. UK and overseas overnight trips taken in 3 month periods, Percentage wave-on-wave, UK



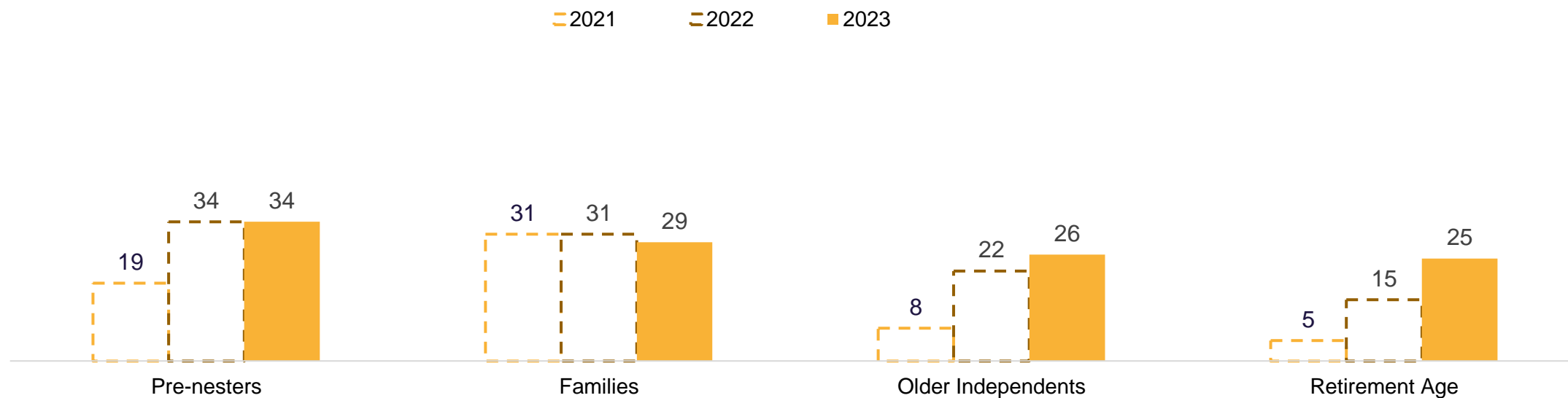
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

Base: All respondents: n=c.1,750 each wave

When extending the period to April and September, there is a positive story for all life stages – unlike domestic tourism where there is a drop-off amongst pre-nesters

Figure 20. Overnight OVERSEAS trips taken between April and September by life stage, Percentage, October fieldwork, UK



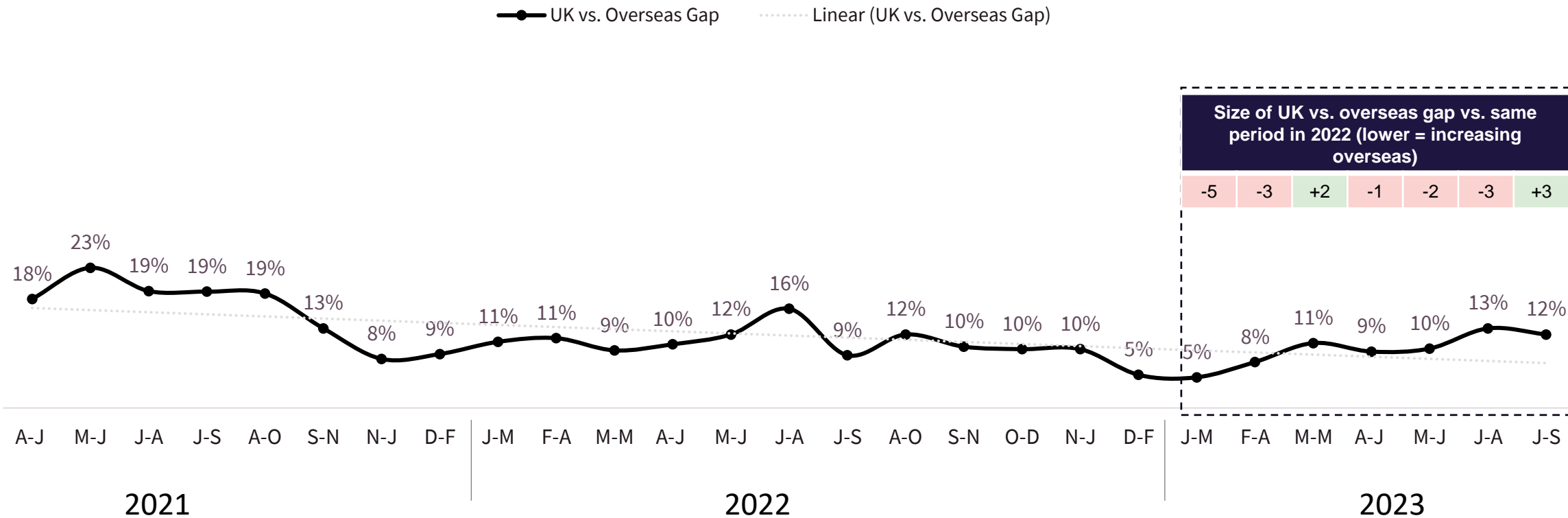
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2. In which of these months have you taken an overnight short break or holiday overseas in the last 12 months?

Base: October 2023 Pre-nesters n=287; Families n=658; Older Independents n=474; Retirement Age n=336 October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirement Age n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirement Age n=219 Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.

Since 2021 the gap between domestic and overseas travel has continued to close, further highlighting a slight shift in the mix of trips the UK public takes

Figure 21. Gap between UK and overseas trips taken within 3 month periods, Percentage wave-on-wave, UK



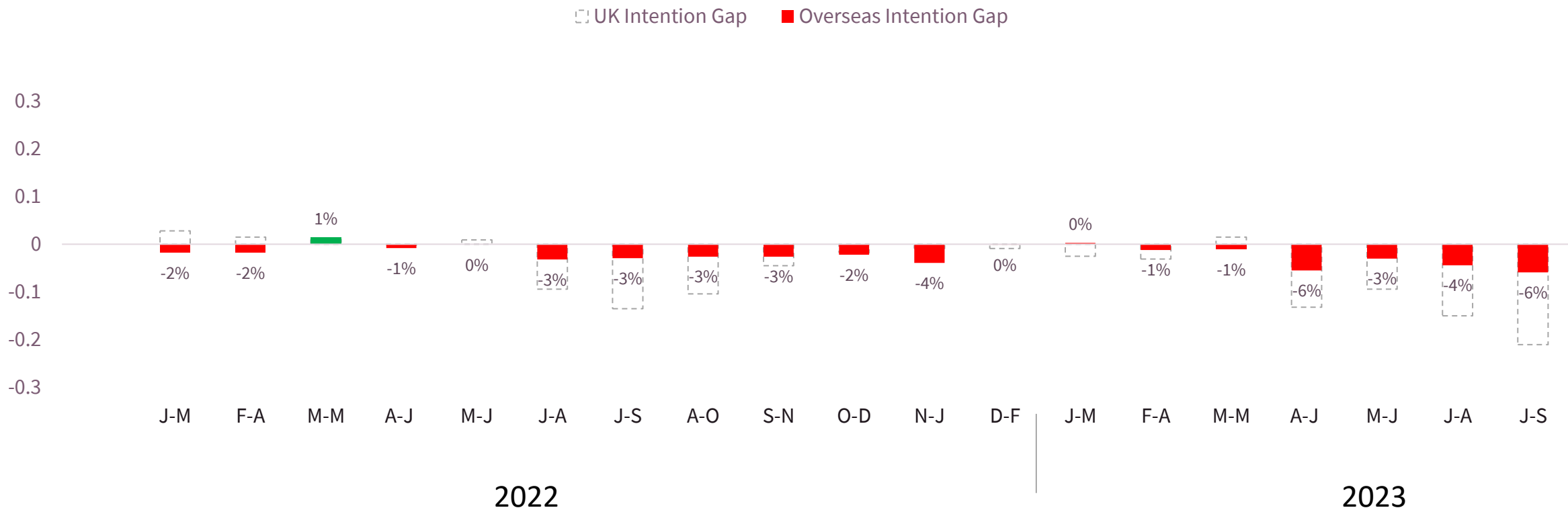
Source: VisitEngland Domestic Sentiment Tracker

Question: QVB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?

Base: All respondents: n=c.1,750 each wave

The overseas intention gap is not as large as the domestic equivalent – planned overseas trips more likely to go ahead. This suggests that domestic travel may be seen as more ‘expendable’

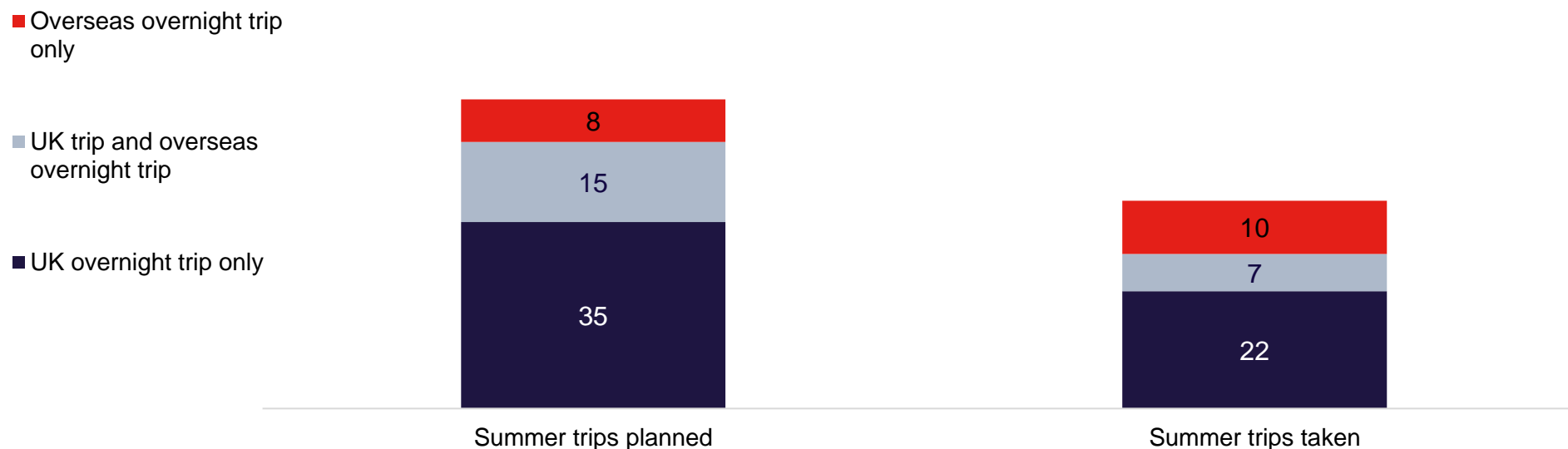
Figure 22. Net difference in UK and overseas trips planned/taken in 3 month periods, Percentage wave-on-wave, UK



Source: VisitEngland Domestic Sentiment Tracker
 Question: QVB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
 Base: All respondents: n=c.1,750 each wave

The more 'expendable' nature of domestic trips is further suggested when looking at the mix of planned trips versus actual trips – 'UK only' trips falling by 13 percentage points, but 'overseas only' planned trips marginally increasing

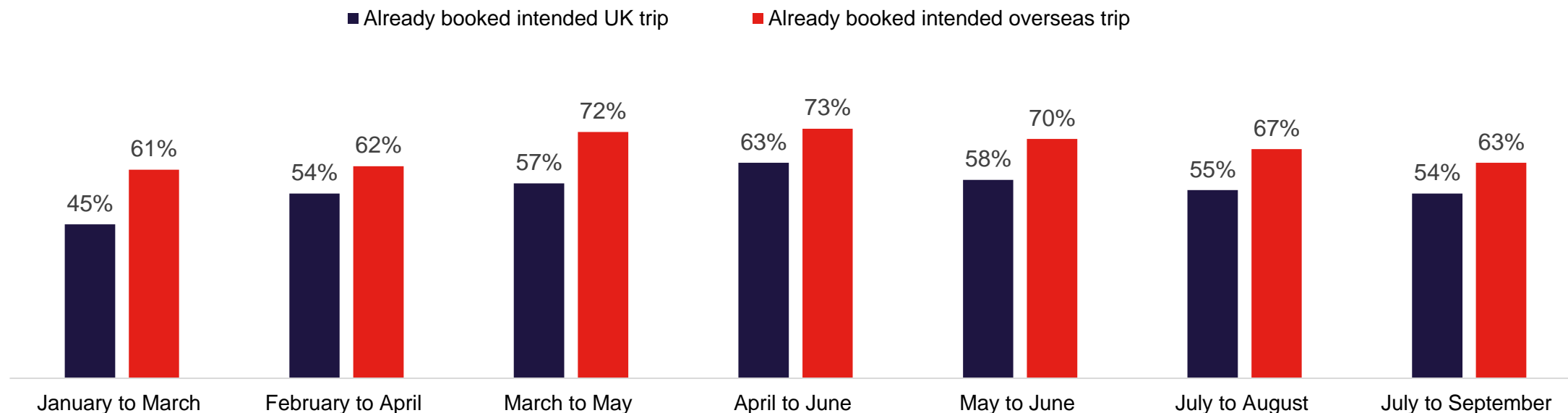
Figure 23. Balance of UK and overseas trips amongst overnight trip intenders and trip-takers, Percentage, July and October fieldwork, UK



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: All respondents: n=c.1,750 each wave

The public's higher likelihood to sacrifice domestic trips may be linked to booking lead times – overseas trips significantly more likely to have been booked at the start of the intended trip period, making UK trips more vulnerable should UK residents need to choose between the two

Figure 24. Booking status of overnight UK and overseas trips planned at the start of each period, Percentage wave-on-wave, UK



Source: VisitEngland Domestic Sentiment Tracker

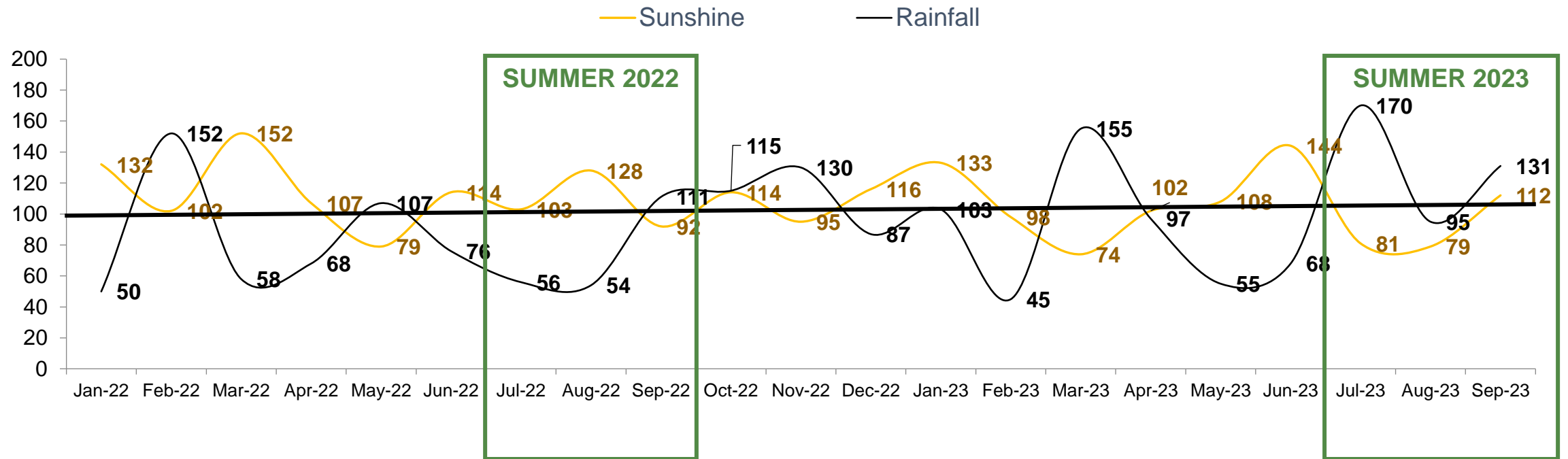
Question: QVB2eNEW.Which of the following best describe how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)>?

Base: All intenders for each period July to September 2023 n=838

4. Other factors impacting domestic travel

The UK was wetter and less sunny in summer 2023 (especially in July and August) than in summer 2022, which may have meant UK residents were less likely to book a 'last minute' domestic break

Figure 25. Percentage of sunshine and rainfall compared to 1991 to 2020 average, Percentage, UK



International air arrivals to the UK this summer were up on the equivalent period in 2022. This suggests a general increase in demand for international travel (outbound as well as inbound) and may have translated to accommodation availability challenges for the domestic audience

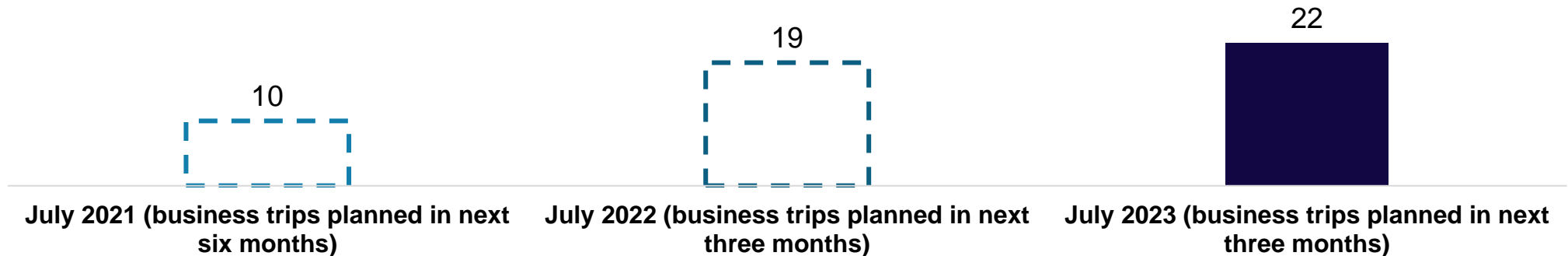
Figure 26. Inbound flight bookings relative to 2019 levels in equivalent period



Source: Forward Keys data up to 17th September 2023

Based on intentions alone, business travel also appears to be on the increase – 22% planning an overnight summer business trip in July 2023, compared to 19% in 2022 and 10% in July

Figure 27. Proportion anticipating an overnight business trip, Percentage, July, U.K. adults in employment*



Source: VisitEngland Domestic Sentiment Tracker

Question: VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months (2021 asked 'by the end of the year')? 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). Base: July 2023 respondents currently in employment n = 1,411 July 2022 respondents currently in employment n = 1,313. July 2021 respondents currently in employment n=1,3333 *Note: Different timeframes

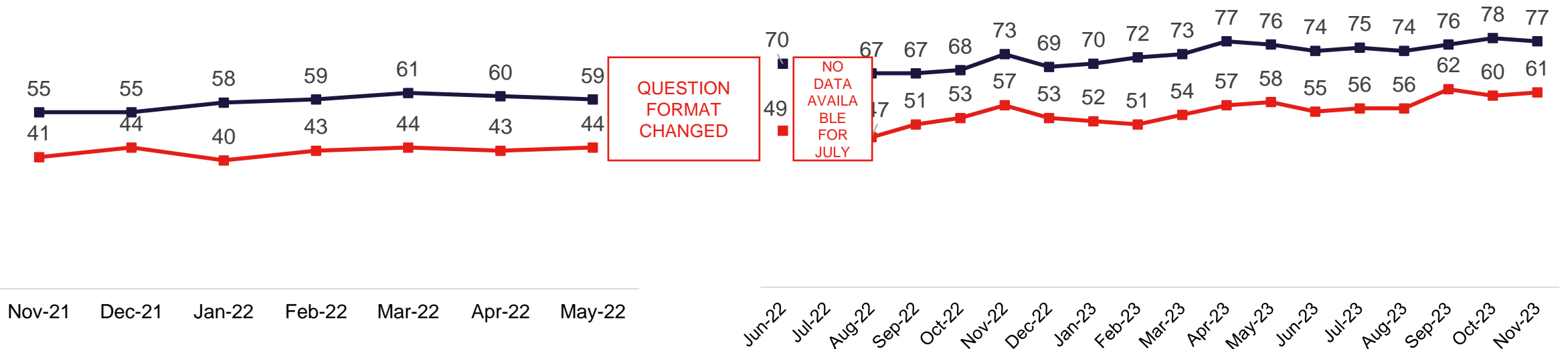


7. Looking ahead: How close to ‘normal’ is domestic travel?

Looking ahead, demand for domestic and overseas overnight tourism in the next 12 months continues to rise

Figure 28. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, October fieldwork, UK

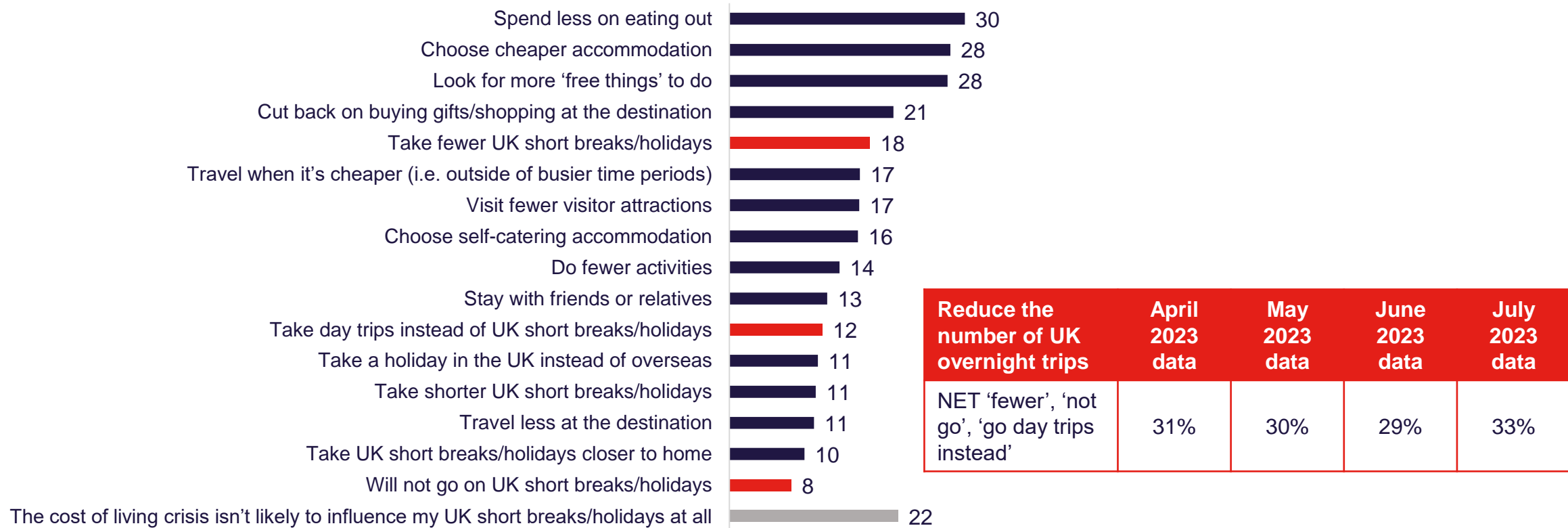
- % intend to take a UK overnight trip
- % intend to take an Overseas overnight trip



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents October 2023 = 1,755. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

However, the ‘cost-of-living crisis’ is still very salient in the public’s minds, and it’s likely they will continue to ‘cut back’ on domestic trips as a result

Figure 31. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, July 2023, UK, Full list





VisitEngland™



Appendix



Statistical Difference

As this research will be conducted with a sample of the target audience, we cannot be 100% certain that a census of the whole population would yield the same results.

However, we can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure.

The percentages within the table represent the error variance for the target sample:

	Survey finding of...		
Base	5 / 95%	20 / 80%	50 / 50%
Total Sample of nat rep audience (n=1750)	+/- 1.0%	+/- 1.9%	+/- 2.3%
Summer trip takers (n=686)	+/- 1.6%	+/- 3.0%	+/- 3.7%
Summer non-trip-takers (n=488)	+/- 1.9%	+/- 3.5%	+/- 4.4%

This research is designed to ensure robust sample sizes for analysis.

Quality Standards & Accreditation



We are ISO 20252:2012 and ISO 27001:2013 certified, the recognised international quality standards for market research and information security.

- We are working towards ISO 20252:2019 and expect to be fully certified to that by February 2023
- All work is carried out in conformity to these standards, the MRS Code of Conduct, GDPR, the UK's Data Protection Act, and all other relevant industry codes, legal and ethical requirements
- Adherence to the standard is independently audited once per year
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence with these same standards.