Domestic Sentiment Tracker: September 2022

Published: 20th September 2022

Fieldwork Period: 1st – 7th September 2022

UK Results

Contents

1. Current General Sentiment (slides 6-10)
2. Trip Intentions: UK and overseas (slides 11-22)
3. The Next Trip: Overnight and Day Trips (slides 23-33)
4. Past UK and Overseas Trips (slides 34-36)
5. Overnight Business Trip Intentions* (slides 37-38)
6. Methodology & Further Data (slides 39-41)

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 and Covid-19, 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 – 7th September 2022.
- 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 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>October and December 2022</u>
- **January to March 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>January and March 2023</u>

September 2022: Scorecard of Key Metrics

Key Metrics	September 2022	Change since August 2022
Perceptions of the situation regarding <u>Covid-19</u> (% stating 'WORST IS STILL TO COME')	24%	+3%*
Perceptions of the situation regarding <u>cost of living crisis</u> (% stating 'WORST IS STILL TO COME')	80%	+4%*
Comfort with everyday activities (average score out of 4)	3.2	No change
Confidence in ability to take UK overnight trip in September / October / November (% NET confident)	69% / 69% / 63%	-4%* / -3% / -5%*
Confidence in ability to take overseas overnight trip in September / October / November (% NET confident)	54% / 55% / 50%	-1% / 0% / -3%
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	9%	-7%*
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-14%	No change
Proportion intending a UK overnight trip <u>at any point in the next 12 months</u>	67%	No change
Proportion intending an overseas overnight trip <u>at any point in the next 12 months</u>	51%	+4%*
Top 3 barriers to taking a UK overnight trip from August to September	1st Rising cost of living; 2nd Personal finances; 3rd Rising costs of holidays/leisure	Personal finances moves up to 2nd place and Rising costs of holidays/leisure moving to 3rd

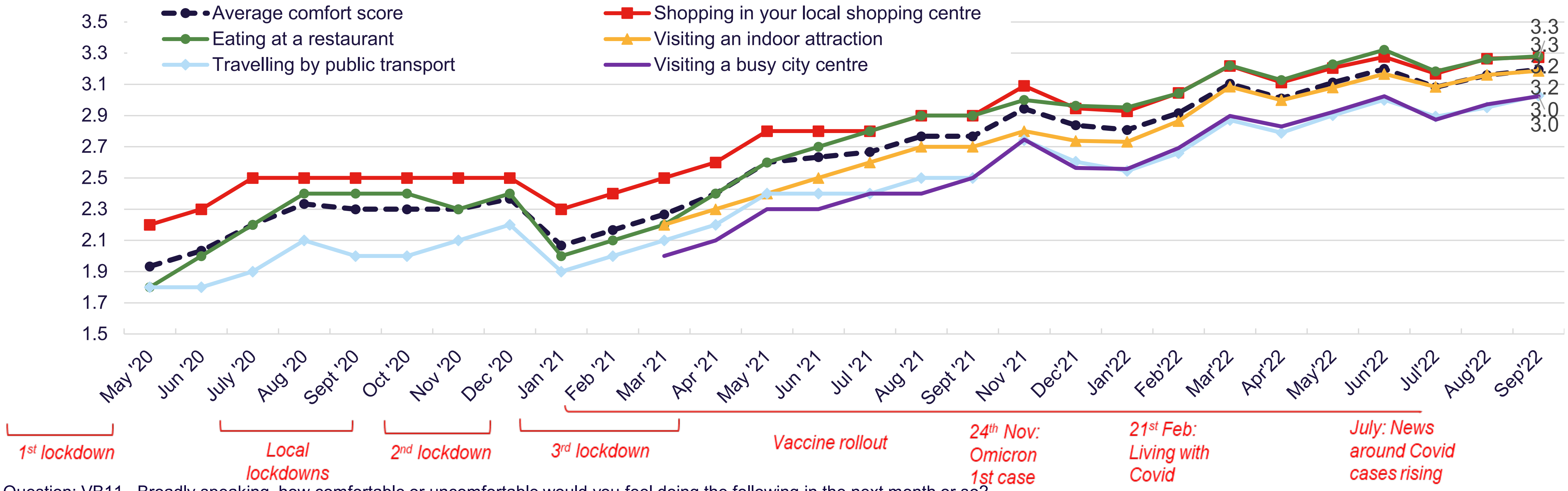
* Represents a statistically significant change on previous wave

1. Current General Sentiment

Comfort levels with everyday activities

Comfort levels with all everyday activities in September are generally in line with August data, with the 'average comfort score' stable at 3.2.

Figure 1. Level of comfort conducting a range of activities separately and combined, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, UK

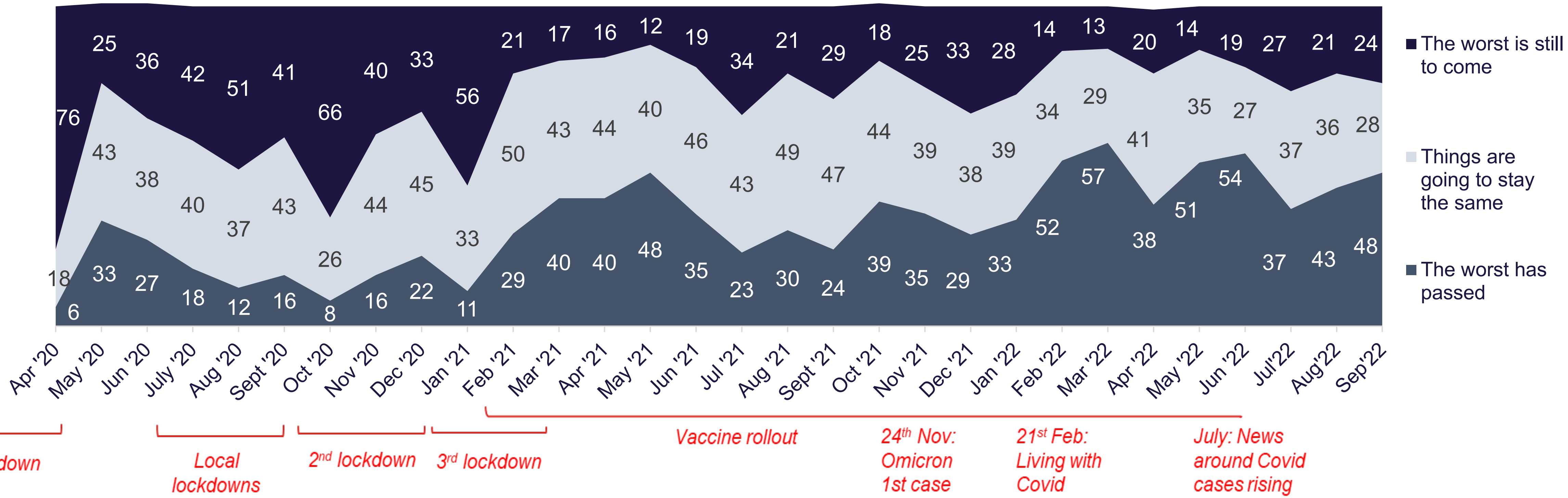


Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. September 2022 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: These questions were not asked in October 2021

Perceptions of the situation relating to COVID-19

From August to September, the proportion of those who think ‘the worst has passed ’ in relation to COVID-19 has increased, moving from 43% to 48%. At the same time, slightly more perceive the worst is still to come.

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK

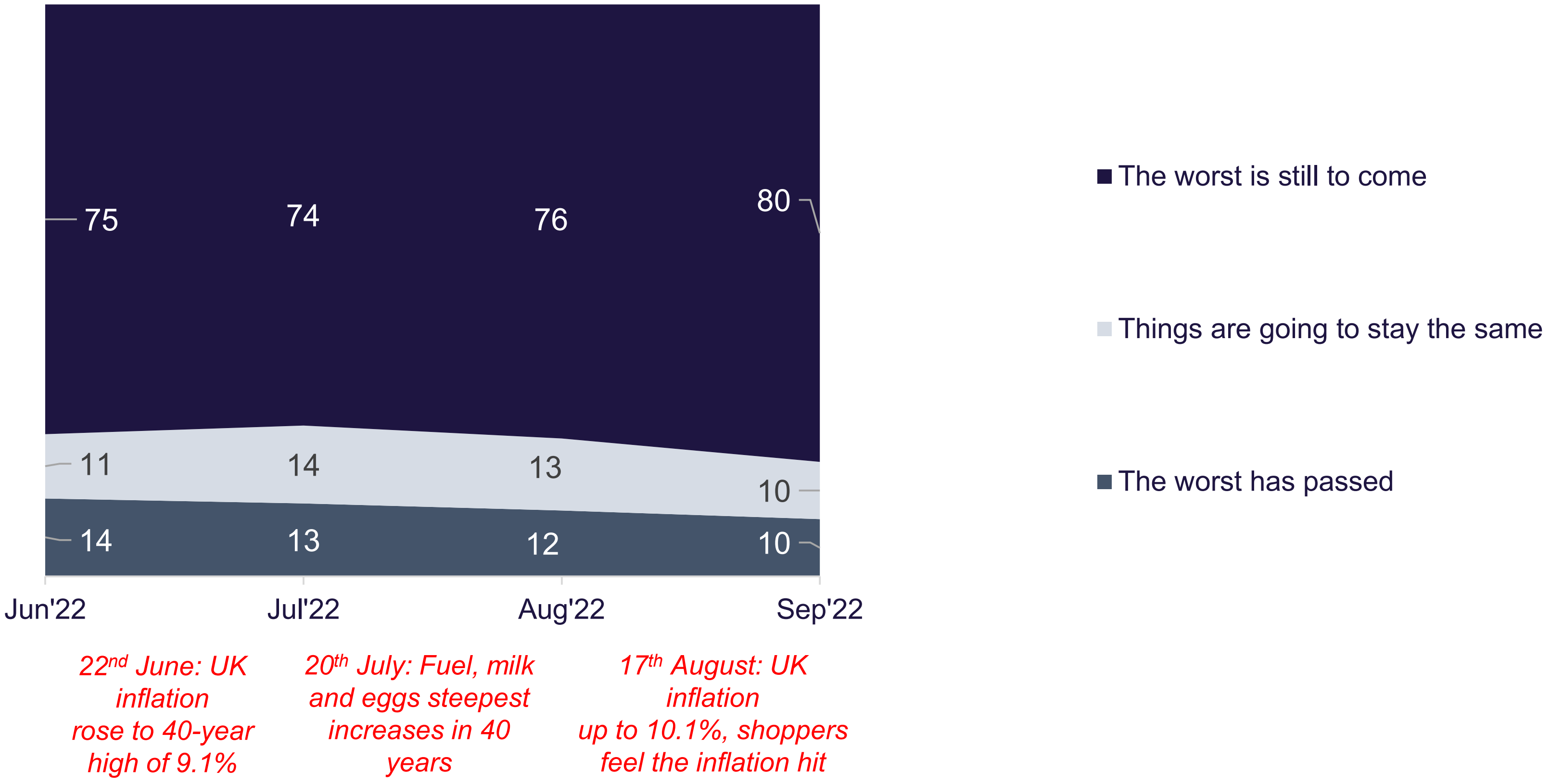


Question: Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. September 2022 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Perceptions of the situation relating to cost of living crisis

4 in 5 (80%) of UK adults think 'the worst is still to come' in relation to the cost of living crisis, an increase on the previous three months.

Figure 3. Perception of the situation with regards to cost of living crisis, Percentage, UK

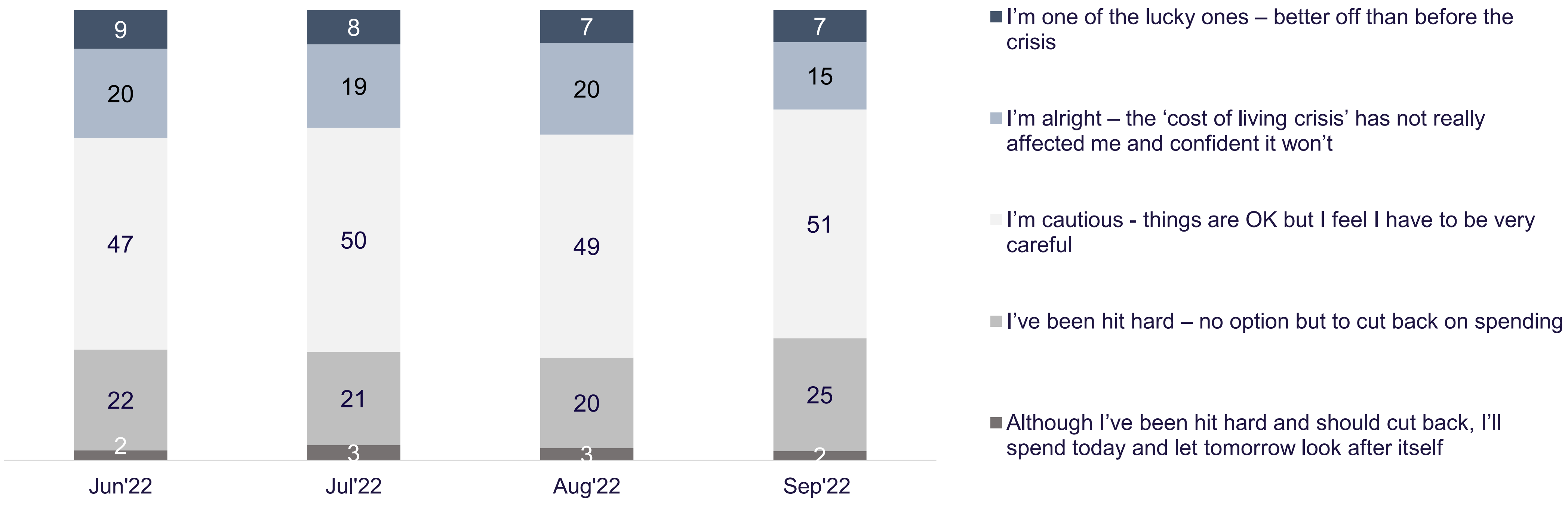


Question: Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. September 2022 = 1,758

Feelings about the situation relating to cost of living crisis

Fewer UK adults feel their financial situation is 'alright' compared to August, down from 20% to 15%, driven by a rise in the proportion of those 'hit hard' and having to cut back on spending, up from 20% in August to 25% in September.

Figure 4. Feelings about situation during the 'cost of living crisis', Percentage, UK



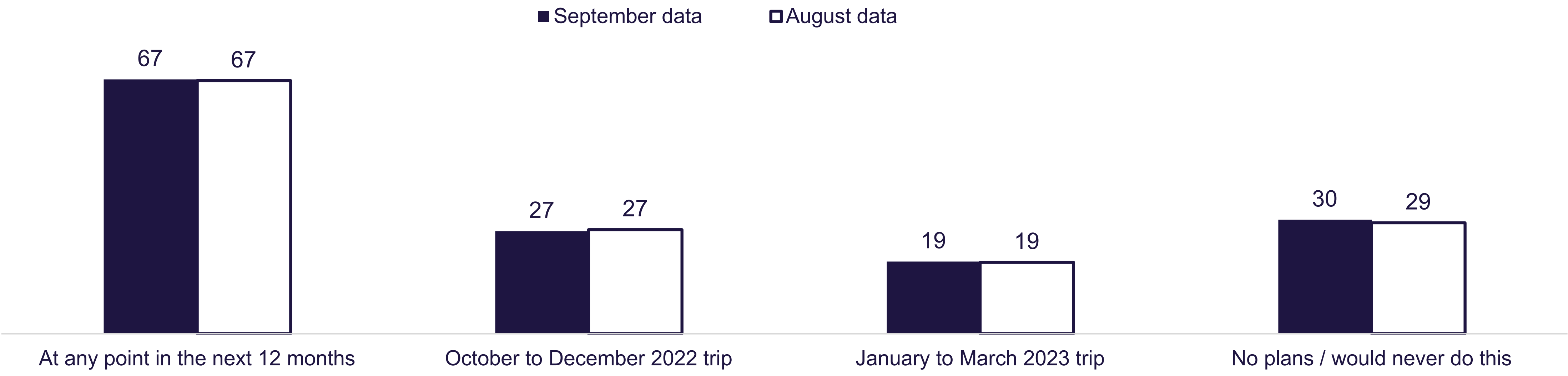
Question: Q17: There has been a lot of talk about how the 'cost of living crisis' has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. September 2022 = 1,758

2. Trip Intentions: UK and overseas

Overnight trips intentions – UK trips

67% of UK adults plan on taking an overnight domestic trip at some point in the next 12 months, consistent with expectations in August. In September, 27% are planning a trip between October and December, and 19% are intending to take a trip between January and March next year.

Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, September 2022, UK

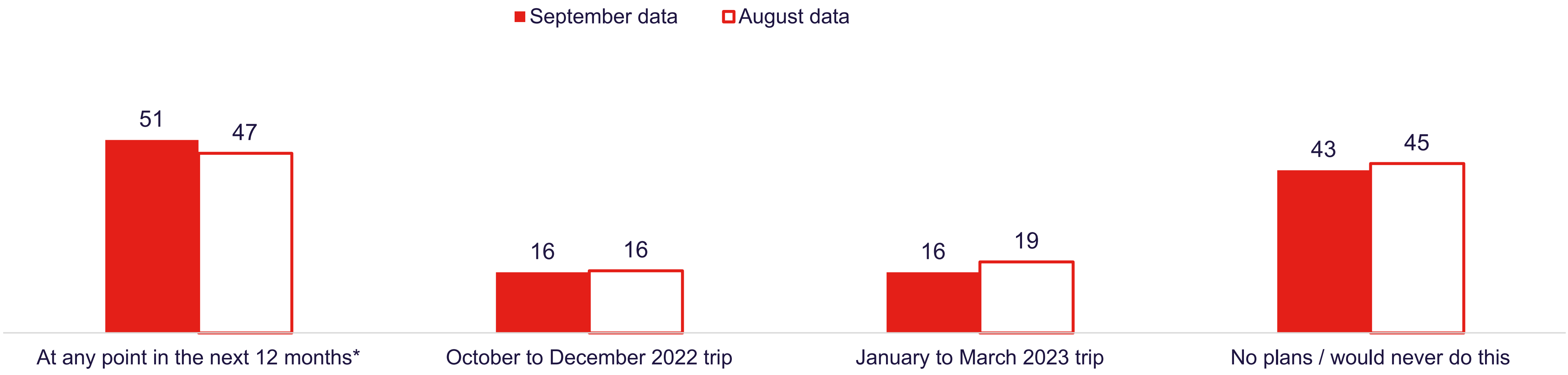


Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. August 2022 = 1,759, September 2022 = 1,758 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Overnight trips intentions - overseas

More than half (51%) of UK adults are anticipating an overseas trip at some point in the next 12 months, an increase on August intentions.

Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, September 2022, UK

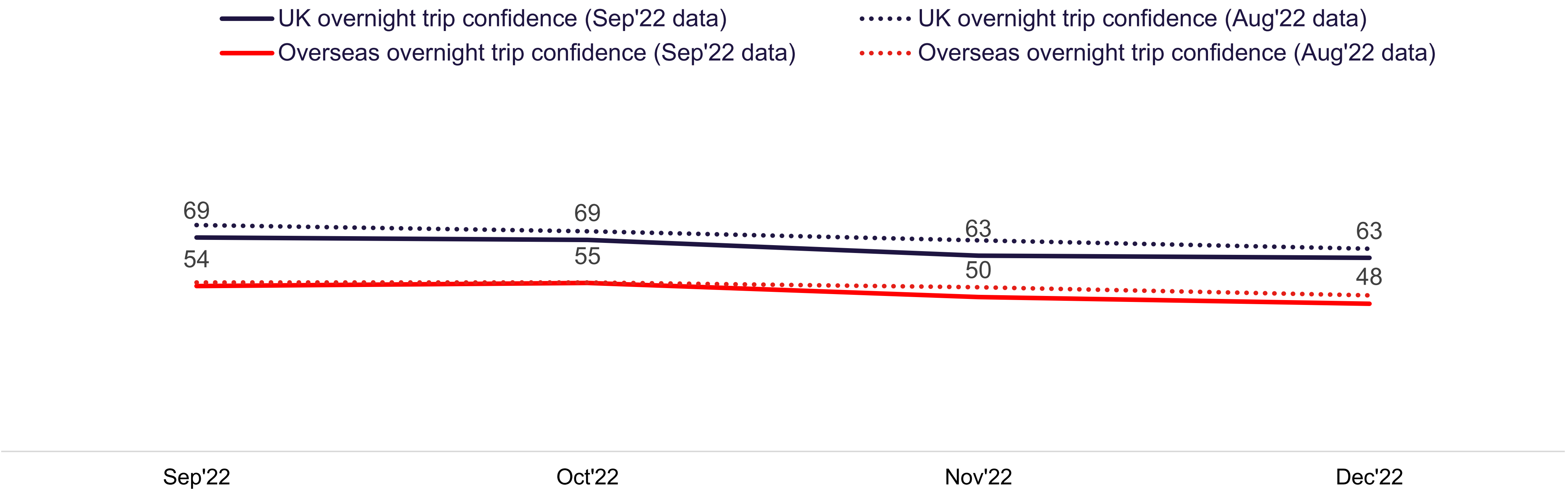


Question: QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. August 2022 = 1,759, September 2022 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Confidence in the ability to take an overnight trip

Overnight trip confidence levels for both domestic and overseas trips have slightly decreased on those reported in August 2022. Confidence is highest for trips in September and October 2022 and gradually decreases for November and December trips.

Figure 6. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, August and September 2022, UK



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? VB7d. We'd like you to imagine that you have booked an overseas 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: All respondents. August 2022 = 1,759, September 2022 = 1,758.

Anticipated number of UK and overseas trips in next 12 months compared to pre-pandemic

27% of UK adults intend to take more domestic overnight trips in the next 12 months compared to pre-pandemic, while 30% intend to take fewer overseas trips, suggesting a switch from overseas to domestic travel.

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, September 2022, UK

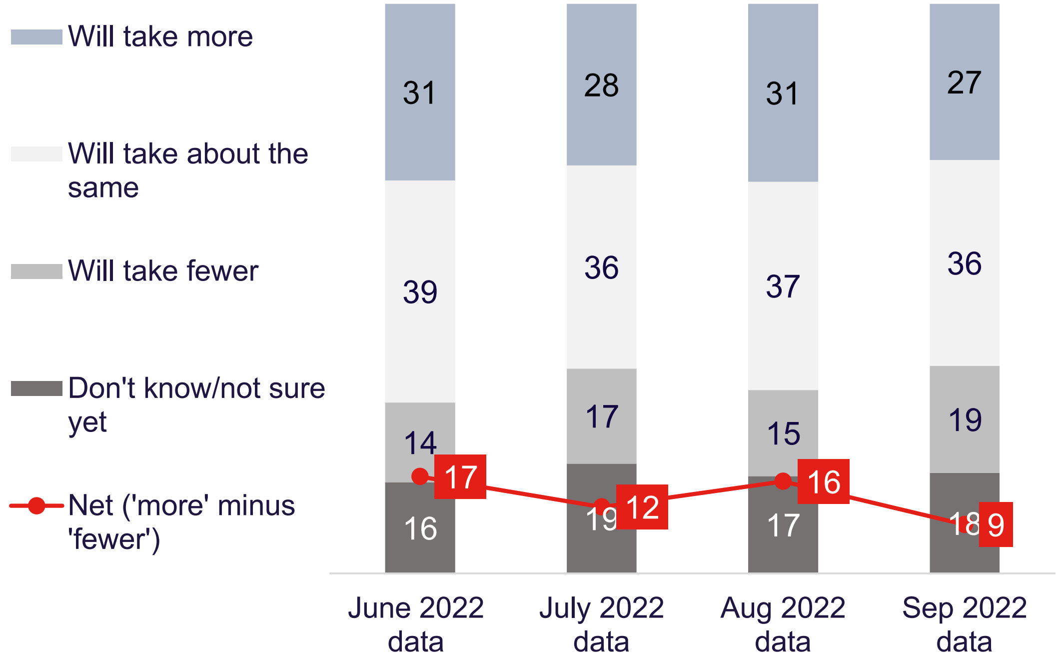
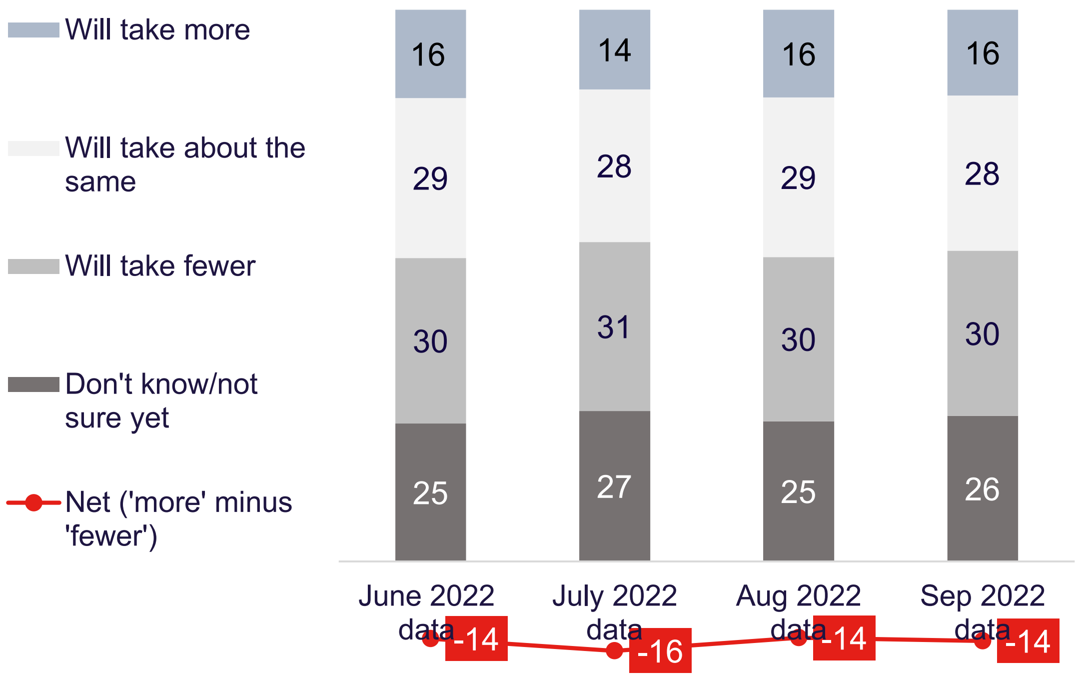


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, September 2022, UK



Question: VB1a. Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took before the COVID-19 pandemic? Base: All respondents. September 2022 = 1,758.

Anticipated change in UK and overseas trips in next 6 months compared to pre-pandemic

34% of respondents indicated they are more likely to choose a UK trip than an overseas trip, compared to pre-pandemic. The top reason for UK preference is 'UK holidays are easier to plan' (60%). For the 21% who would choose an overseas trip over a UK trip, the main reason is 'better weather' (45%).

Figure 9. Difference in short break/holiday choices in the next 6 months compared to pre-pandemic, Percentage, September 2022, UK

TOP 5 reasons for UK preference

1. UK holidays are easier to plan (60%)
2. UK holidays are cheaper (51%)
3. To avoid long queues at airports/cancelled flights (47%)
4. Shorter / quicker travel (42%)
5. Uncertainty around restrictions at overseas destinations (38%)

TOP 5 reasons for Overseas preference

1. Better weather (45%)
2. I want to visit new places (45%)
3. I want to explore other cultures (34%)
4. Overseas holidays are cheaper (30%)
5. I'm prioritising overseas trips after missing out during the pandemic (28%)

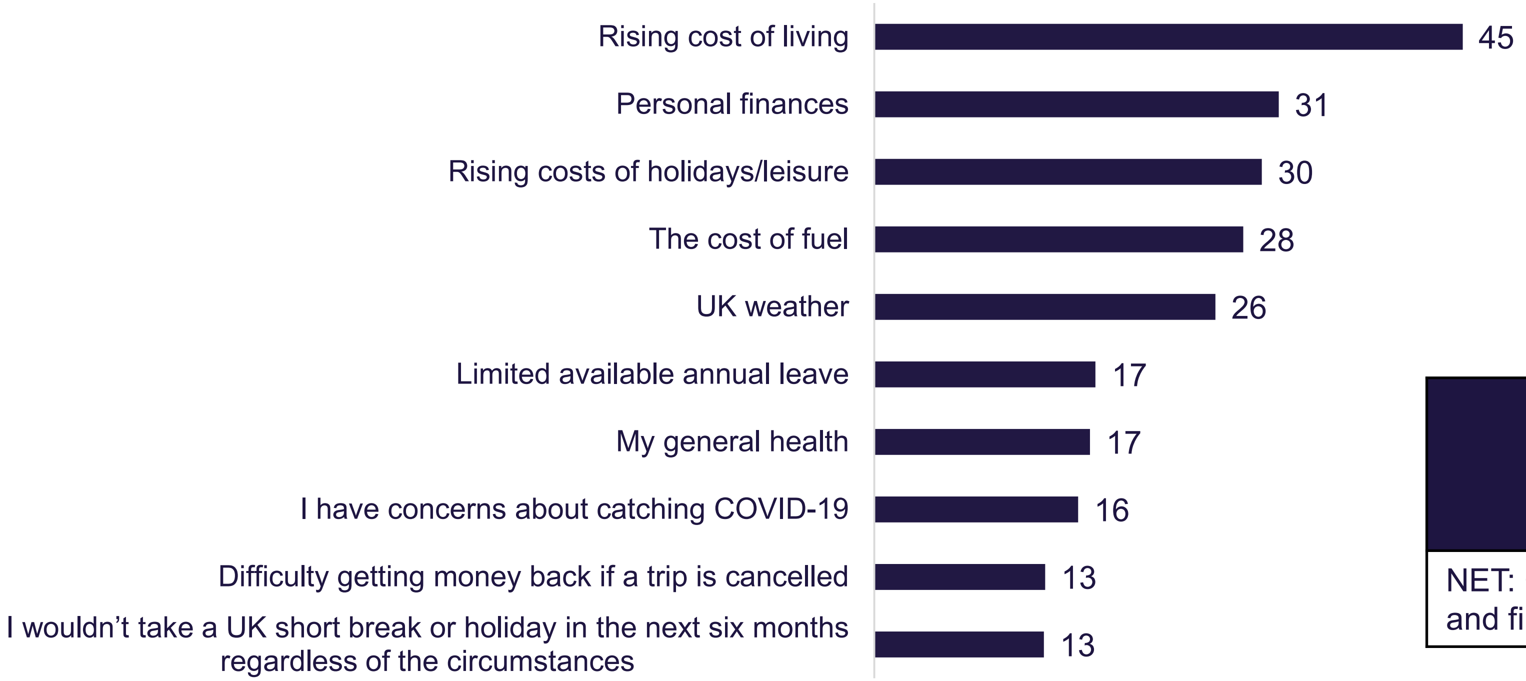
FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.

Question: VB2j. Thinking of the next 6 months, how different do you think your short break/holiday choices will be compared to before the COVID-19 pandemic? Base: All respondents. September 2022 = 1,758. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic? September 2022 = 639, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? September 2022 = 356

Perceived barriers to taking overnight UK trips in next 6 months

The ‘rising cost of living’ is the biggest perceived barrier to taking overnight UK trips in the next 6 months (45% stating this), followed by ‘personal finances’ (31%) and ‘rising costs of holidays/leisure’ (30%). At a net level, ‘costs and finances’ as a barrier is relatively in line with figures reported previously.

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months, Percentage, September 2022, UK



	June 2022 data	July 2022 data	August 2022 data	September 2022 data
NET: Costs and finances	67%	64%	60%	62%

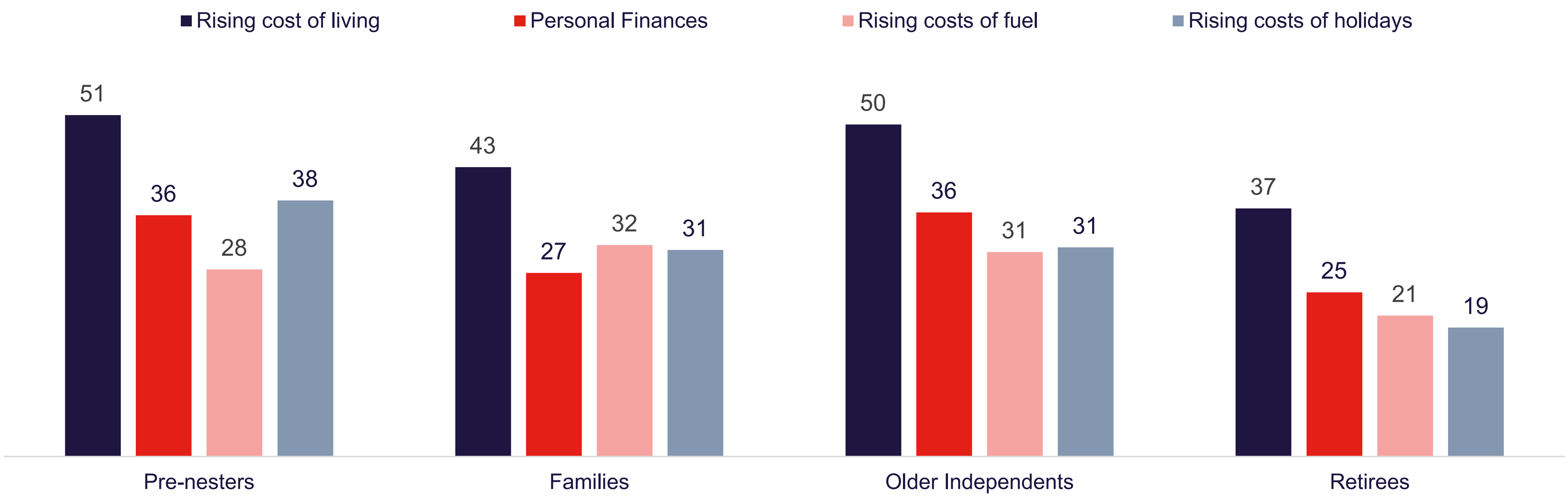
FOR THE FULL LIST OF BARRIERS, PLEASE SEE THE PUBLISHED TABLES.

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 2022 = 1,758. *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’

Finance related barriers to taking overnight UK trips in next 6 months

The ‘rising cost of living’ is the top financial barrier across all life stages, most prominent among pre-nesters and older independents, least dominant amongst retirees.

Figure 11. Perceived financial barriers as a potential barrier to taking an overnight trip in the UK in next 6 months, Percentage, September 2022, UK

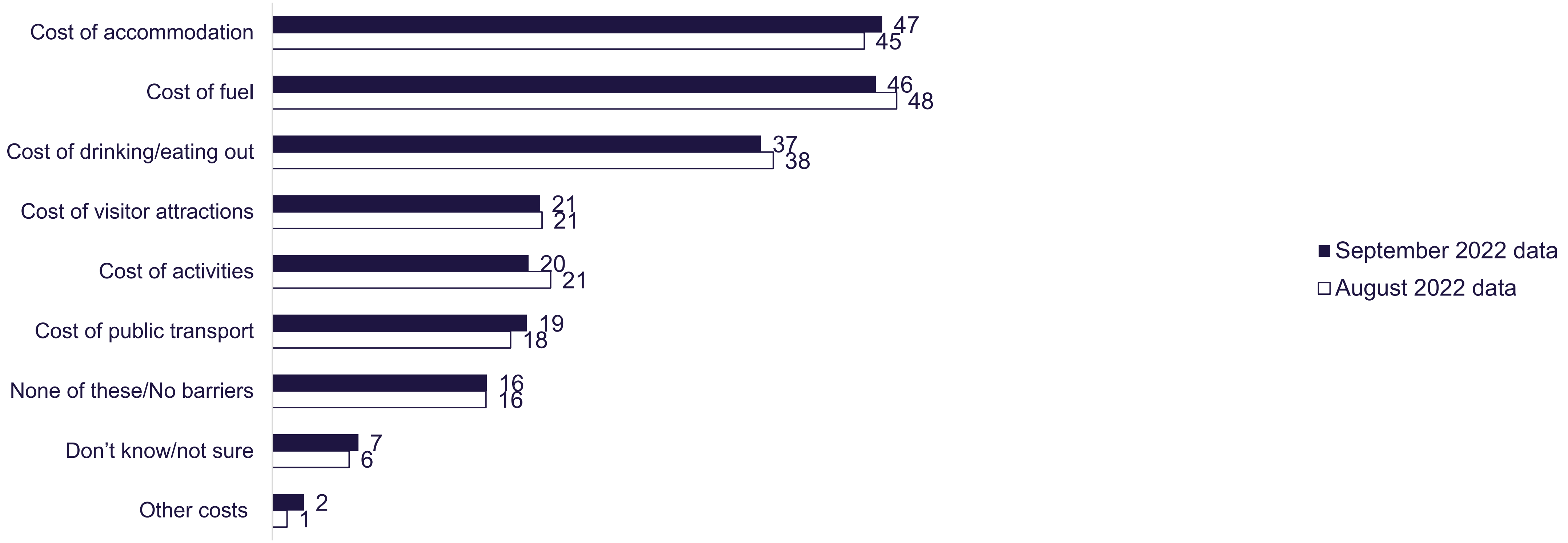


Question: VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: September fieldwork period; Pre-Nesters (383), Families (682); Older Independents (442); Retirees (251)

Individual trip costs as barriers to taking overnight UK trips in next 6 months

Focusing on costs related to overnight trips, 'cost of accommodation' becomes the top barrier to taking overnight UK trips in the next 6 months (47%), followed closely by 'cost of fuel' (46%).

Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Percentage, September 2022, UK, Full list



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: August 2022 = 1759, September 2022 = 1758.

Cost of living crisis’ impact on UK overnight trips - among next 6 months trip intenders

As a result of the ‘cost of living crisis’, 36% of UK adults say they will ‘choose cheaper accommodation’ and 34% will ‘spend less on eating out’ and ‘look for more free things to do’. Around 1 in 5 (22%) say it would have no influence on their choice of destination, while 12% would not go on a break/holiday at all.

Figure 13a. ‘Cost of living’ impact on UK holidays and short breaks, Percentage, September 2022, 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 2022 = 1758.

Cost of living crisis' impact on day trips within the next few months

Focusing on day trips in the next few months, as a result of the 'cost of living crisis', 34% of UK adults say they will 'look for more 'free' things to do' on their day trips. 32% will 'take fewer day trips and 30% will 'spend less on eating out'. 14% will not go on day trips. However, a quarter (25%) say it would have no influence on their day trips at all.

Figure 13b. 'Cost of living' impact on day trips, Percentage, September 2022, UK, Full list

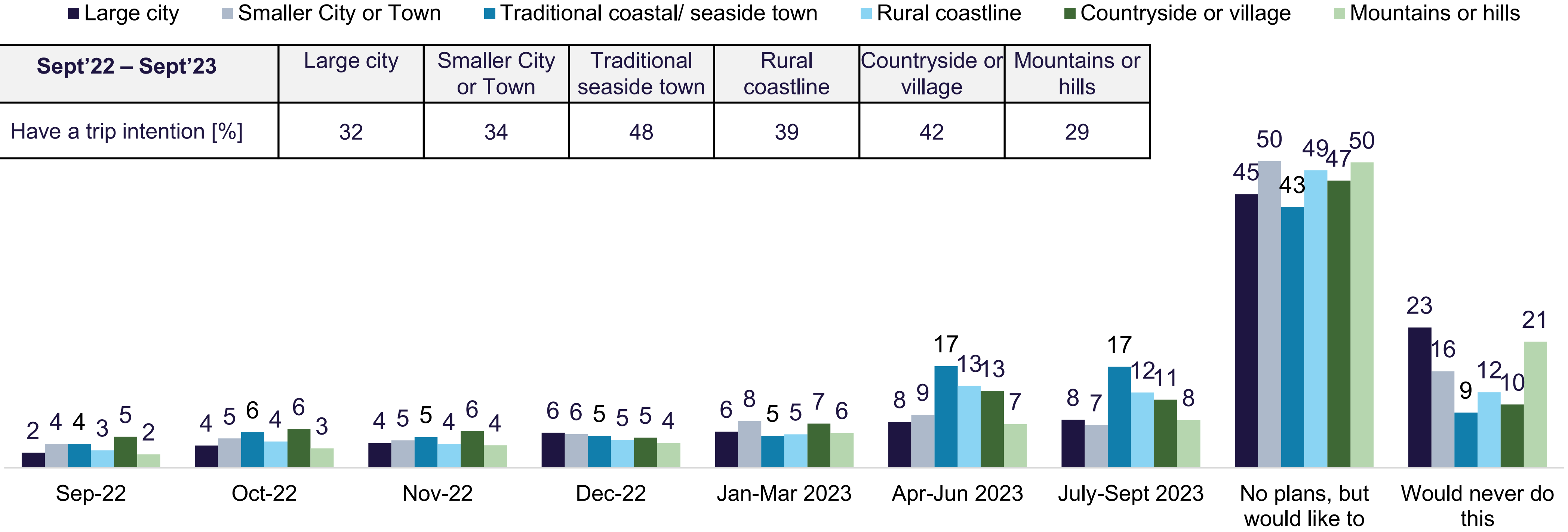
Question: VB7Cii. How, if at all, would you say the 'cost of living crisis' is likely to influence your day trips in the next few months?
Base: September 2022 = 1758.

All potential UK overnight trips intentions by destination

The top destination type for an overnight domestic trip in until November 2022 is 'countryside or village', while in January to March 2023 the top destination is a smaller city or town. Looking further ahead into next year from April-September 2023 'traditional coastal/seaside town' is expected to dominate the trip intentions.

Figure 14. Overnight trips intentions in next year by destination type, Percentage, September 2022, UK

Sept'22 – Sept'23	Large city	Smaller City or Town	Traditional seaside town	Rural coastline	Countryside or village	Mountains or hills
Have a trip intention [%]	32	34	48	39	42	29



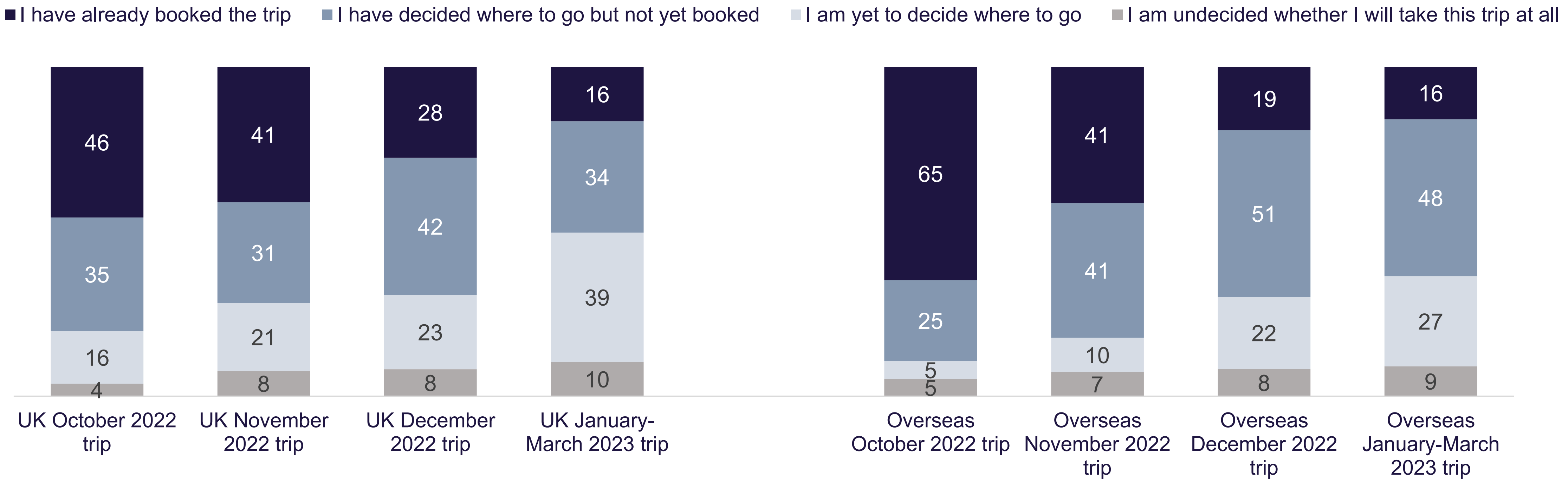
Question: VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Please select all possible occasions, not just the next one. / Base: September 2022 = 1,758.

3. The Next Trip: Overnight and Day Trips

Planning and booking for next intended overnight trips in the UK / overseas

The majority (65%) of intenders have already booked their overseas trips in October. For UK trips, just under half (46%) have already booked their trip with 35% decided but yet to book.

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, September 2022, UK

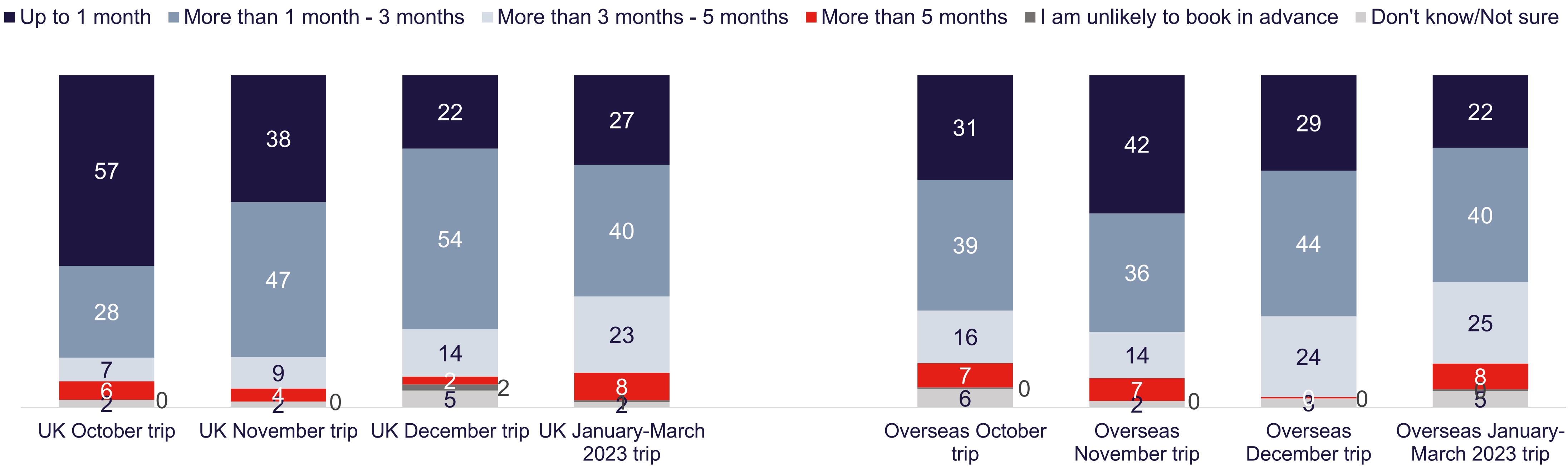


Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: October n = 198, November 2022 n = 102, December 2022 n = 119, January-March 2023 n = 171. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: October n = 92, November 2022 n = 65, December 2022 n = 71, January-March 2023 n = 178

Lead time from booking till first day of that trip

57% of UK adults will have booked their domestic October trip within 1 month of going on the trip, while 31% will have booked their overseas October trip within a month of going.

Figure 16. Time between booking the next UK and overseas overnight trip and first day of that trip, Percentage, September 2022, UK

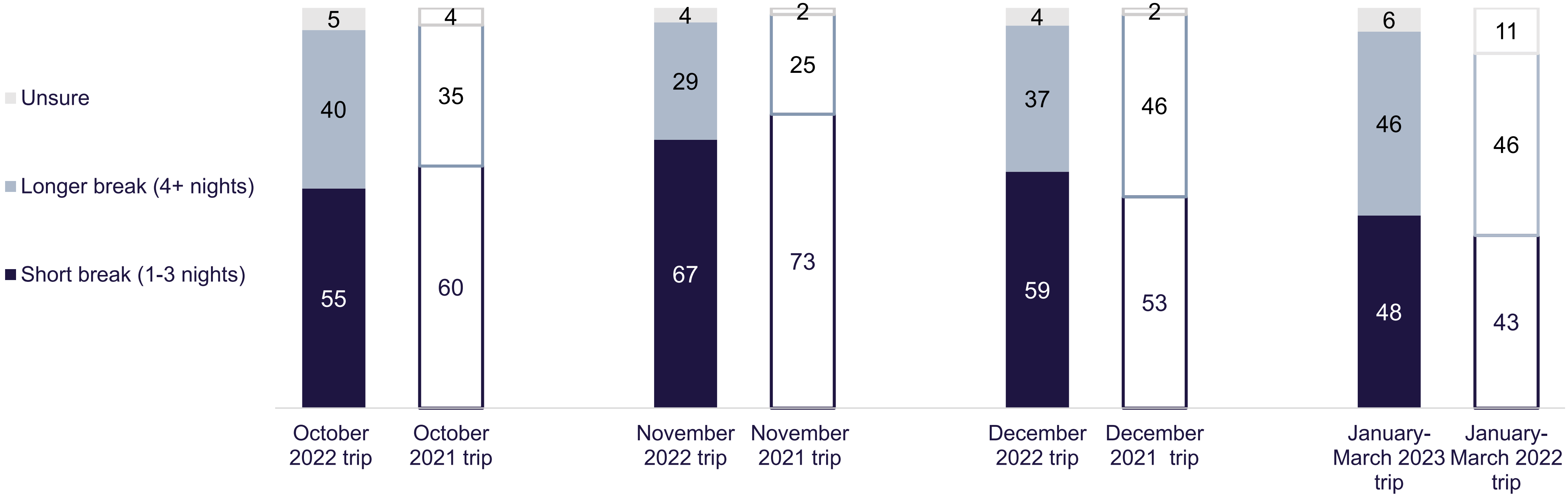


Question: VB2f. Roughly how much time is there likely to be between you booking your next overnight UK trip in <INSERT MONTH FROM VB2a(III)> and the first day of your trip? UK trip: October n = 198, November 2022 n = 102, December 2022 n = 119, January-March 2023 n = 171. VB2h. Roughly how much time is there likely to be between you booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? Overseas trip: October n = 92, November 2022 n = 65, December 2022 n = 71, January-March 2023 n = 178

Duration of the next overnight trip in UK

Short breaks are more popular than longer breaks until the end of 2022. Comparing last year and this year's data, the trend is the same.

Figure 17. Length of next UK holiday or short break by time period, Percentage, September 2022, UK



Question: QVB3. Is this next trip in <INSERT MONTH FROM VB2A> likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All September 2022 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: October n = 198, November n =102, December n = 119, January-March 2023 n = 171; UK trip 2021-2022: October n = 196, November n = 76, December n = 80, January-March 2023 n = 82

Where planning on staying on the next overnight trip in the UK

The South West is the most preferred UK overnight destination for trips between October to December 2022 (15% of intenders planning a trip there), while for trips in January to March 2023 the top destination is the North West (17% intending to take a trip there).

Figure 18. Where planning on staying on next UK overnight trip in October to December 2022, Percentage, August and September 2022, UK

■ August/September 2022 data □ August/September 2021 data

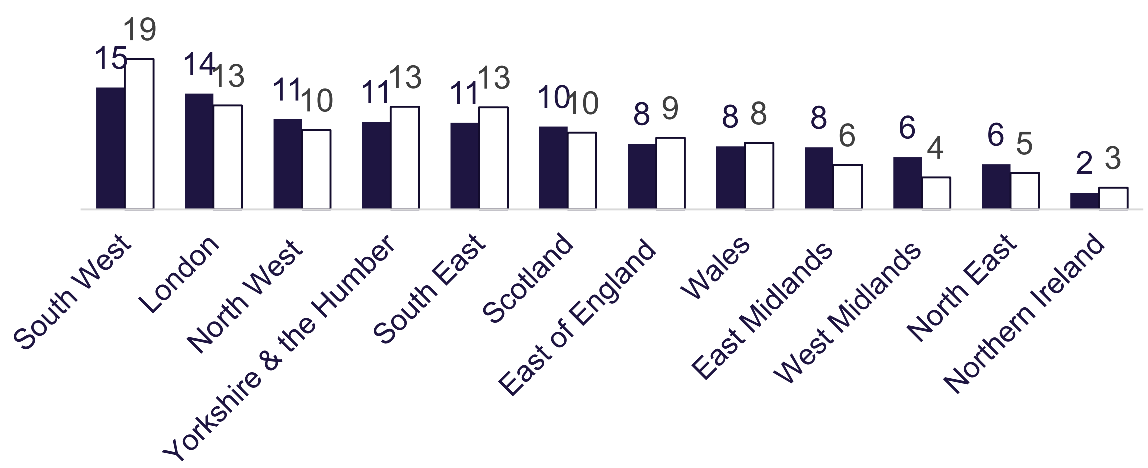
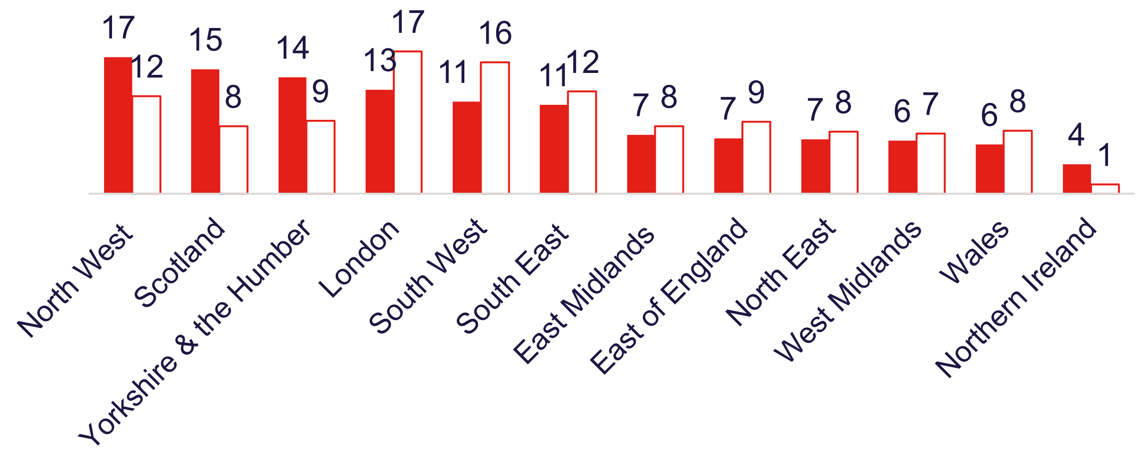


Figure 19. Where planning on staying on next UK overnight trip in January to March 2023, Percentage, August and September 2022, UK

■ August/September 2022 data □ August/September 2021 data



Question: QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All August and September 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 2021 n =626, January to March 2022 n = 155. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Main mode of transport for the next overnight trip in the UK

52% are intending to travel on their October to December trip using their own car, while only 39% are planning to do so for their January to March 2023 trip. UK adults are slightly more likely intending to use a train for their January to March trips than for their October to December trips.

Figure 20. Top 5 main modes of travel to destination for trip in October to December 2022, Percentage, August and September 2022, UK

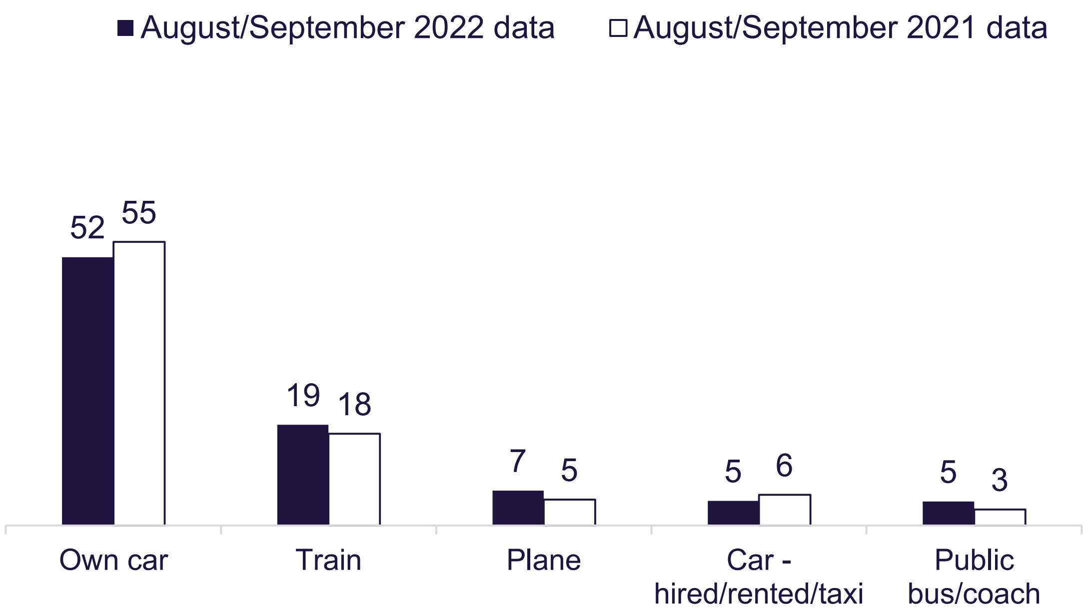
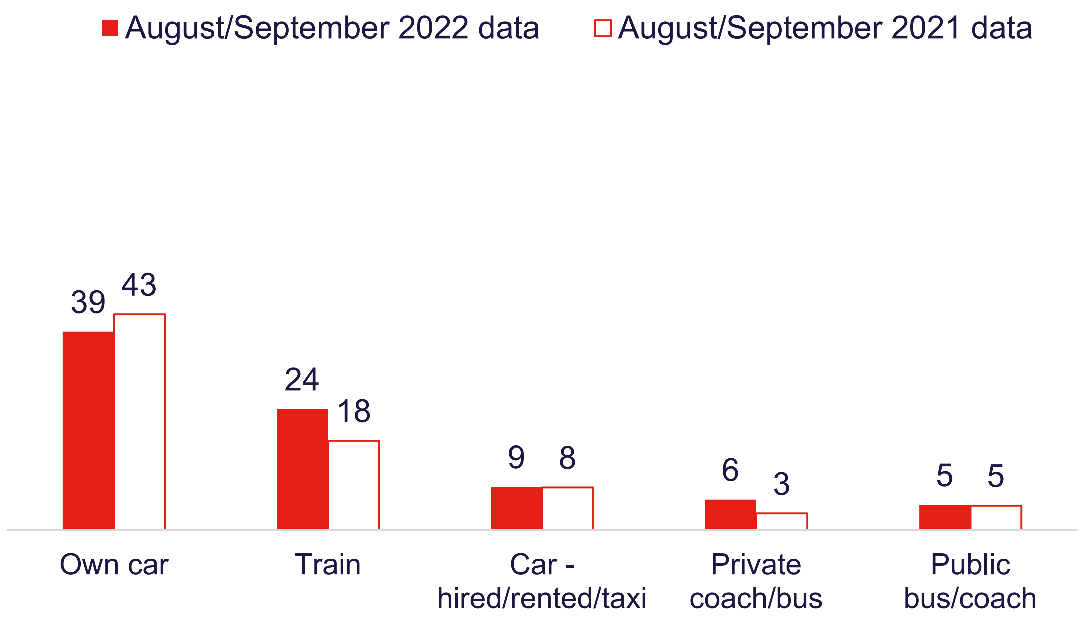


Figure 21. Top 5 main modes of travel to destination for overnight trip in January to March 2023, Percentage, August and September 2022, UK



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

Question: QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All August and September 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 2021 n =626, January to March 2022 n = 155

Accommodation type for the next overnight trip in the UK

For the next overnight trip in both time periods, ‘hotel / motel / inn’ is the leading accommodation type.

Figure 22. Top 10 accommodation types planning on staying in on next UK overnight trip in October to December 2022, Net Percentage, August and September 2022, UK

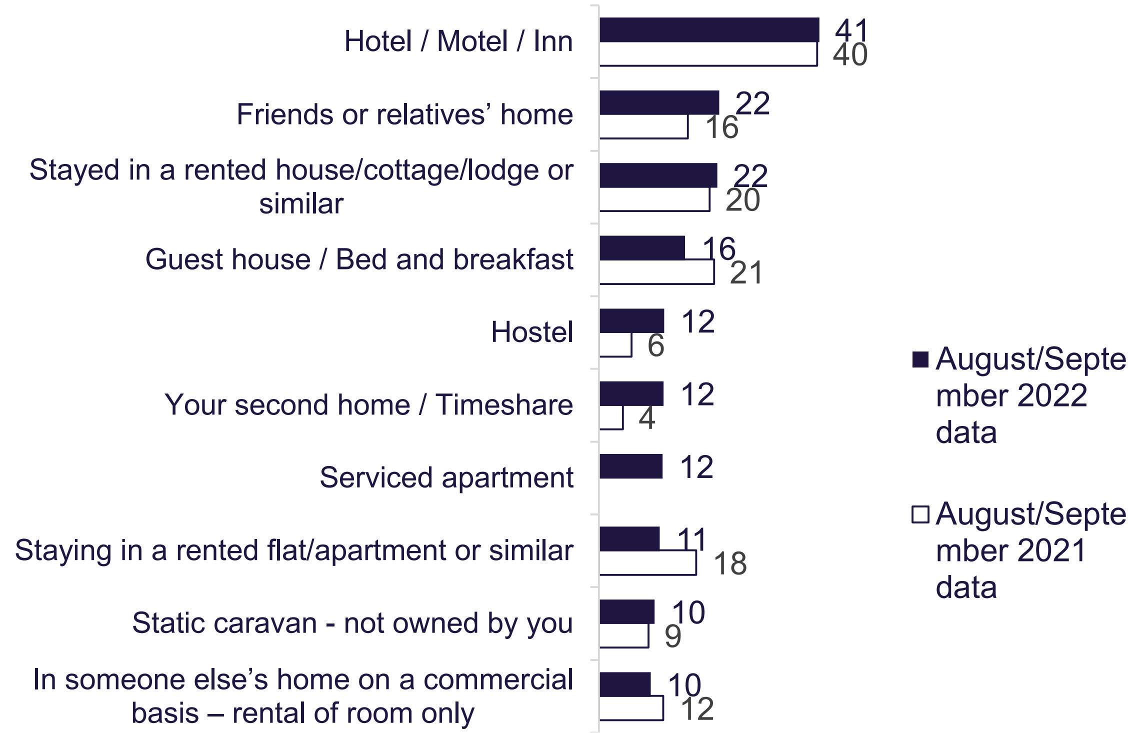
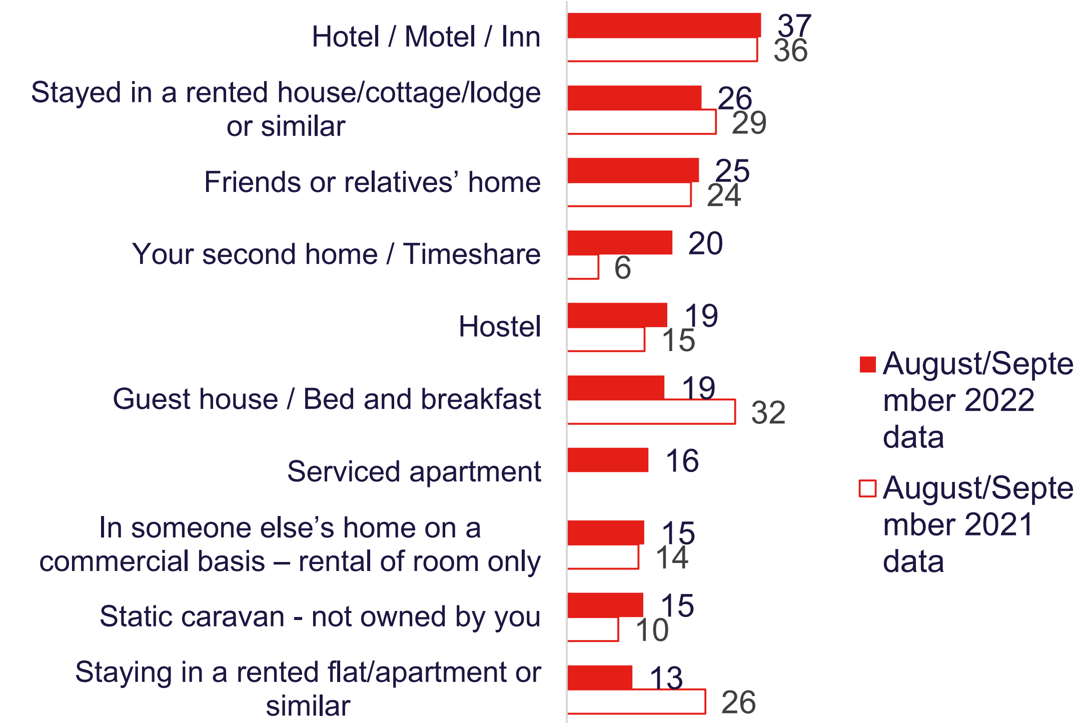


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in January to March 2023, Net Percentage, August and September 2022, UK



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? Base: All August and September 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 2021 n =626, January to March 2022 n = 155 See tables for full breakdown.

Visitor party make-up for the next overnight trip in the UK

‘Partner’ is the most common visitor party member, followed by ‘child, grandchild or young adult with parents’ for both time periods.

Figure 24. Visitor party make-up for trip in October to December 2022, Percentage, August and September 2022, UK

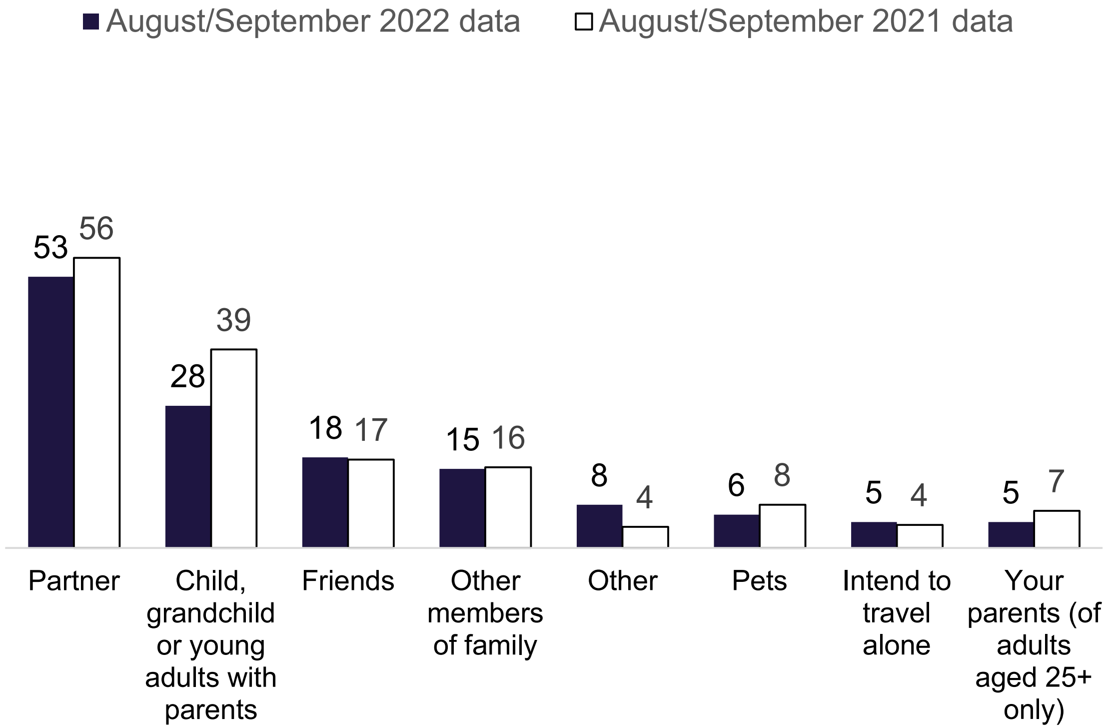
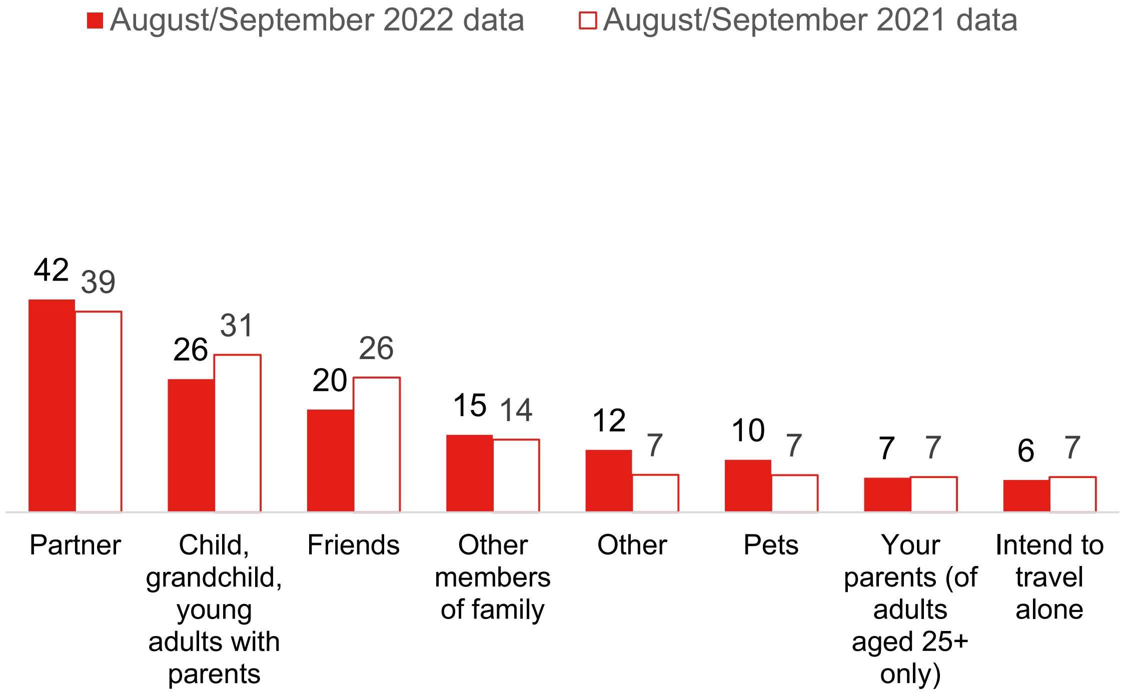


Figure 25. Visitor party make-up for trips taken from trip in January to March 2023, Percentage, August and September 2022, UK



Question: QVB4d. With whom are you likely to be spending your holiday?
Base: All August and September 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 2021 n =626, January to March 2022 n = 155 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

Motivations for the next overnight trip in the UK

Both time 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’, with October-December intenders placing nearly as much importance on family time as getting away from it all.

Figure 26. Motivations for UK holidays and short breaks in October-December 2022, Percentage, September 2022, UK, Full list

Figure 27. Motivations for UK holidays and short breaks in January-March 2023, Percentage, September 2022, 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 2022 n = 419, January to March 2023 n = 171.
Note: Multiple choice question. Totals may exceed 100%.

Activities for the next overnight trip in the UK

The top two intended activities for both time periods are ‘trying local food and drink’ and ‘walking, hiking’ – both significantly higher than other activities between October and December 2022.

Figure 28. Activities for UK holidays and short breaks, <u>in October-December 2022,</u> Percentage, September 2022, UK, Full list

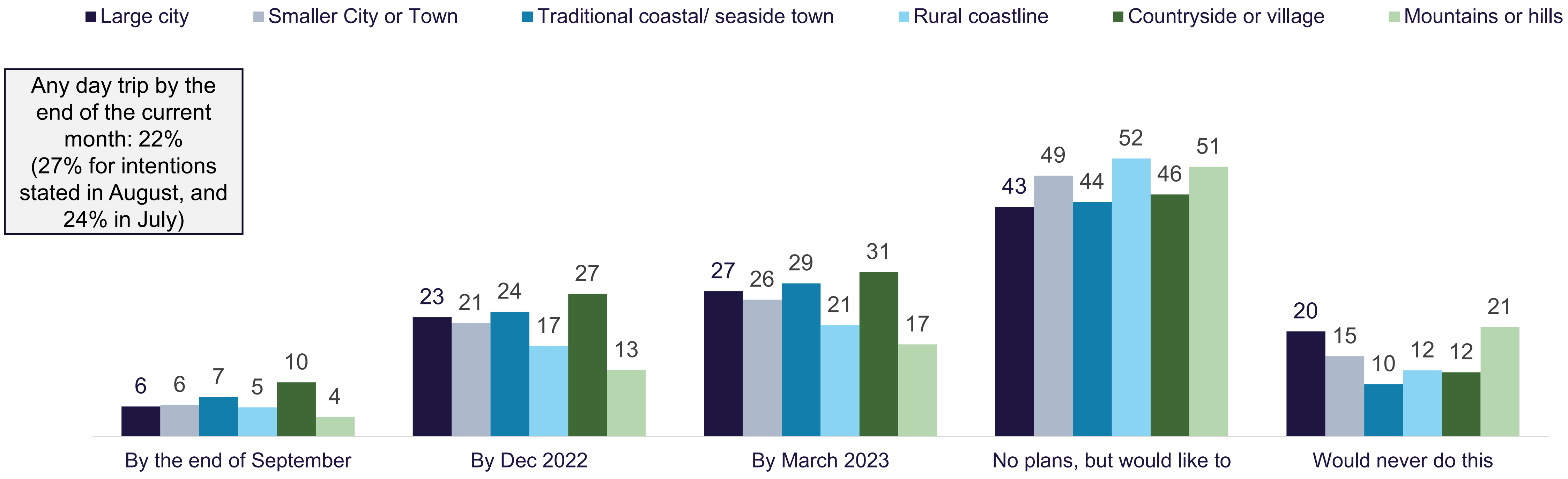
Figure 29. Activities for UK holidays and short breaks <u>in January-March 2023</u>, Percentage, September 2022, UK, Full list

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 July respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 419, January to March 2023 n = 171. Note: Multiple choice question. Totals may exceed 100%.

The next UK day trip intentions by destination type

22% of UK adults intend to take a day trip of any type by the end of September, down on figures reported in the last two months, likely driven by seasonality. 'Countryside or village' is top destination type for a day trip, followed by 'traditional coastal/seaside town' for upcoming day trips up to March 2023.

Figure 30. Next UK day trip intention between September 2022 and March 2023, Cumulative percentages, September 2022, UK



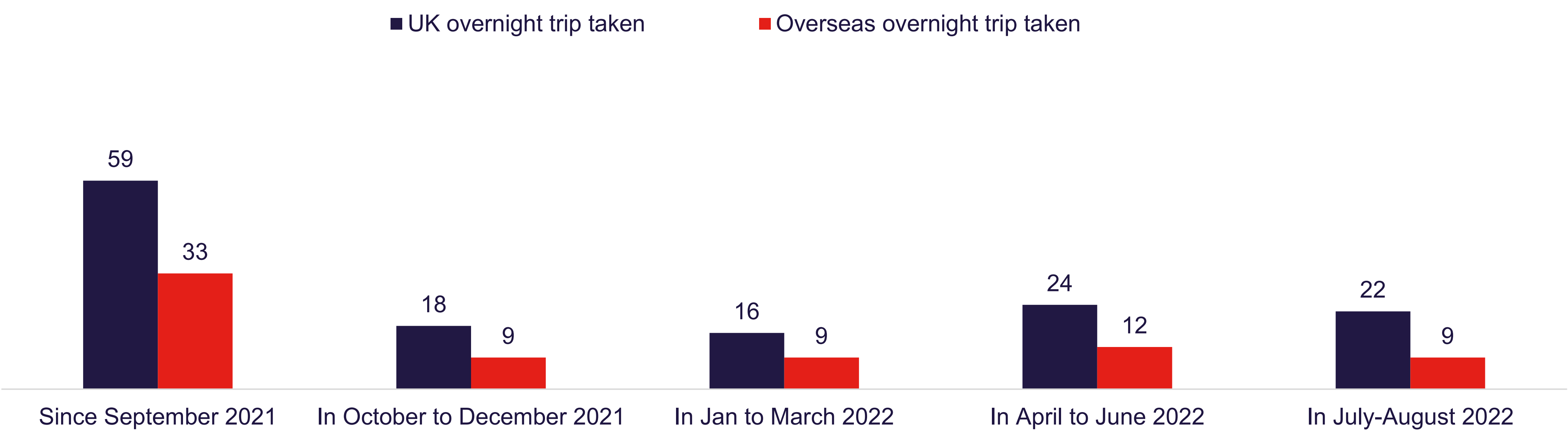
Question: QVB16a. When are you next likely to take a day trip to the following types of places? Please select just the next occasion for each type of destination.
Base: September 2022 = 1,758

4. Past UK and Overseas Trips

UK and overseas trips taken in last 12 months

Nearly 6 in 10 (59%) UK adults have taken a UK overnight trip since September 2021, almost twice as many as have taken an overseas overnight trip in that period (33%). April to June was the most popular period of time for overnight domestic trips.

Figure 31. Proportion taken an overnight UK or overseas trip in below time period, Percentage, September 2022, UK



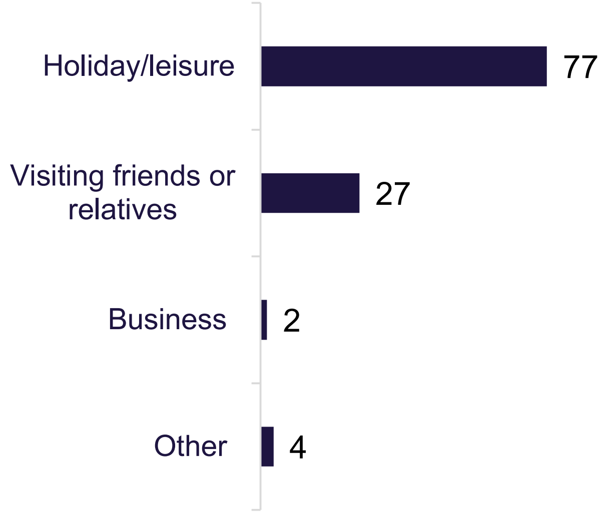
Question: VB13a/f. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. September 2022= 1,758
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

Destination region and purpose of last UK overnight trip in the past 3 months

The South West of England was the most popular destination for trips in the past three months, 19% of trip takers having stayed there, followed by Yorkshire & The Humber (at 14%). Holiday / leisure was the most dominant purpose for overnight UK trips (77% having taken trips for this reason).

Figure 32. Destination of overnight trips taken in UK in the past three months, Percentage, September 2022, UK

Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, September 2022, 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 respondents that took an overnight trips in the last three months n= 437
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

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

Intentions for overnight business trips in the next three months (latest available data)

17% of UK adults in employment plan on taking an overnight business trip in the next 3 months (consistent with former waves). 'Team building' is the leading reason for taking one (at 32%), followed by 'conference/convention/congress' (at 28%)

Figure 34. Proportion anticipating an overnight business trip in next 3 months, Percentage, September 2022, UK adults in employment

81% of UK adults interviewed are in employment

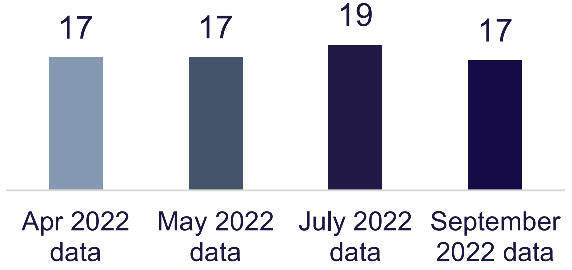
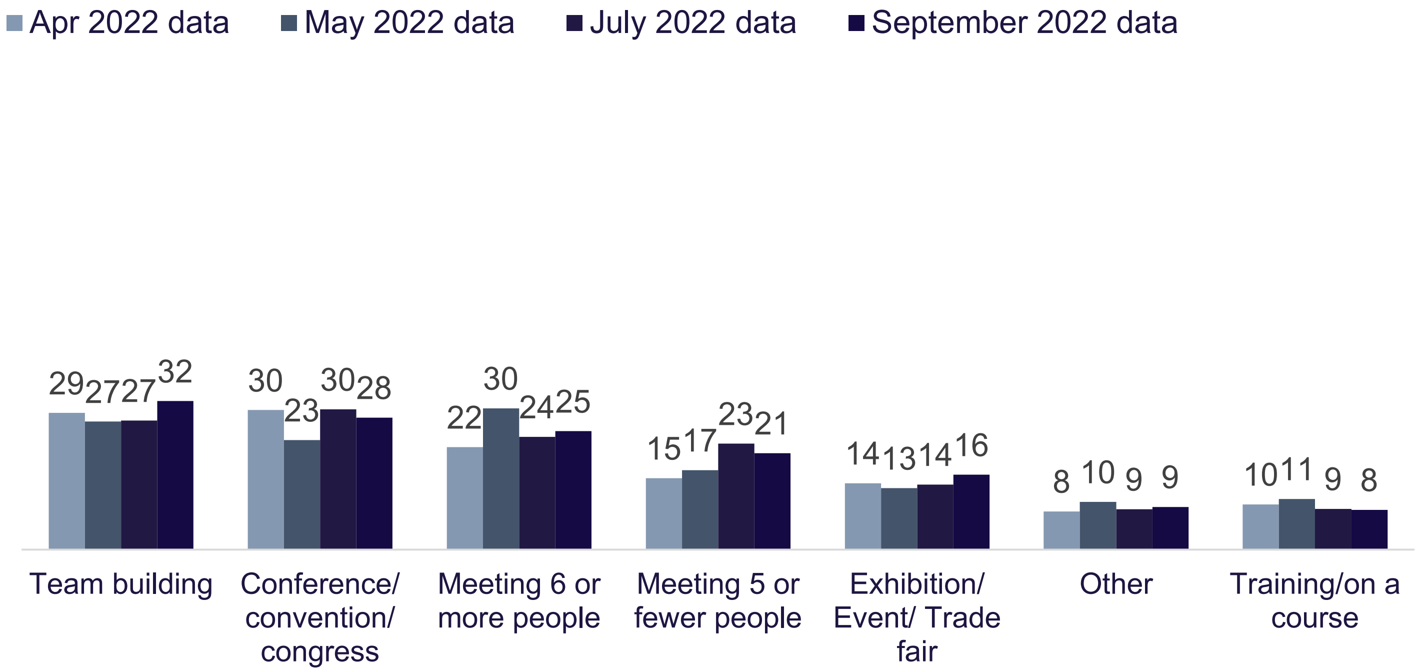


Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, September 2022, UK adults in employment planning a trip



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 2022 respondents currently in employment n = 1,313. All taking a business trip n=267

Methodology & Further Data

Methodology

- This report presents findings from the September 2022 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 5th phase of this project started in June 2022 and will run until March 2023.
- With this newly commissioned phase, the questionnaire was updated to address the cost of living crisis’ impact on trips intentions, in addition to continued tracking of Covid-19 impact. It now 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 5th phase and the previous phases / waves.
- This affects for example sl. 11 Trips Intentions by month – to make space for new, more topical questions, this question was simplified, and this small structural change means that we cannot compare the 5th phase data vs previous months.

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 pre-pandemic
  - VB5b. Reasons for not planning to stay in a large city during your next UK holiday or short break
  - VB9a/b. Intention to visit leisure places in the UK in the next 12 months/ in the next month
  - VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons?
  - VB10a/b. Intention to conduct leisure activities in the UK in the next 12 months/ in the next month
  - VB10c. Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons?
  - Q63. Conditions essential for indoor tourism and leisure providers to have in place for you to visit/use them over the next 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.