

Domestic Sentiment Tracker: October 2022

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Fieldwork Period: 3rd – 9th October 2022

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 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 3rd – 9th October 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 October and December 2022
- **January to March 2023 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January and March 2023

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
- **Retirees:** Aged 65+.

October 2022: Scorecard of Key Metrics

Key Metrics	October 2022	Change since September 2022
Perceptions of the situation regarding <u>Covid-19</u> (% stating 'WORST IS STILL TO COME')	21%	-3%*
Perceptions of the situation regarding <u>cost of living crisis</u> (% stating 'WORST IS STILL TO COME')	79%	-1%
Comfort with everyday activities (average score out of 4)	3.2	No change
Confidence in ability to take UK overnight trip in October / November / December (% NET confident)	71% / 66% / 64%	+2% / +3% / +1%
Confidence in ability to take overseas overnight trip in October / November / December (% NET confident)	56% / 53% / 51%	+1% / +3% / +3%
Net proportion of UK trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-2%	-11%*
Net proportion of overseas trips in the next 12 months vs pre-pandemic [% 'more' minus % 'fewer' trips]	-22%	-8%*
Proportion intending a UK overnight trip <u>at any point in the next 12 months</u>	68%	+1%
Proportion intending an overseas overnight trip <u>at any point in the next 12 months</u>	53%	+2%
Top 3 barriers to taking a UK overnight trip in the next 6 months	1 st Rising cost of living; 2 nd Rising costs of holidays/leisure; 3 rd Personal finances	Personal finances moves down to 3 rd place and Rising costs of holidays/leisure moves to 2 nd

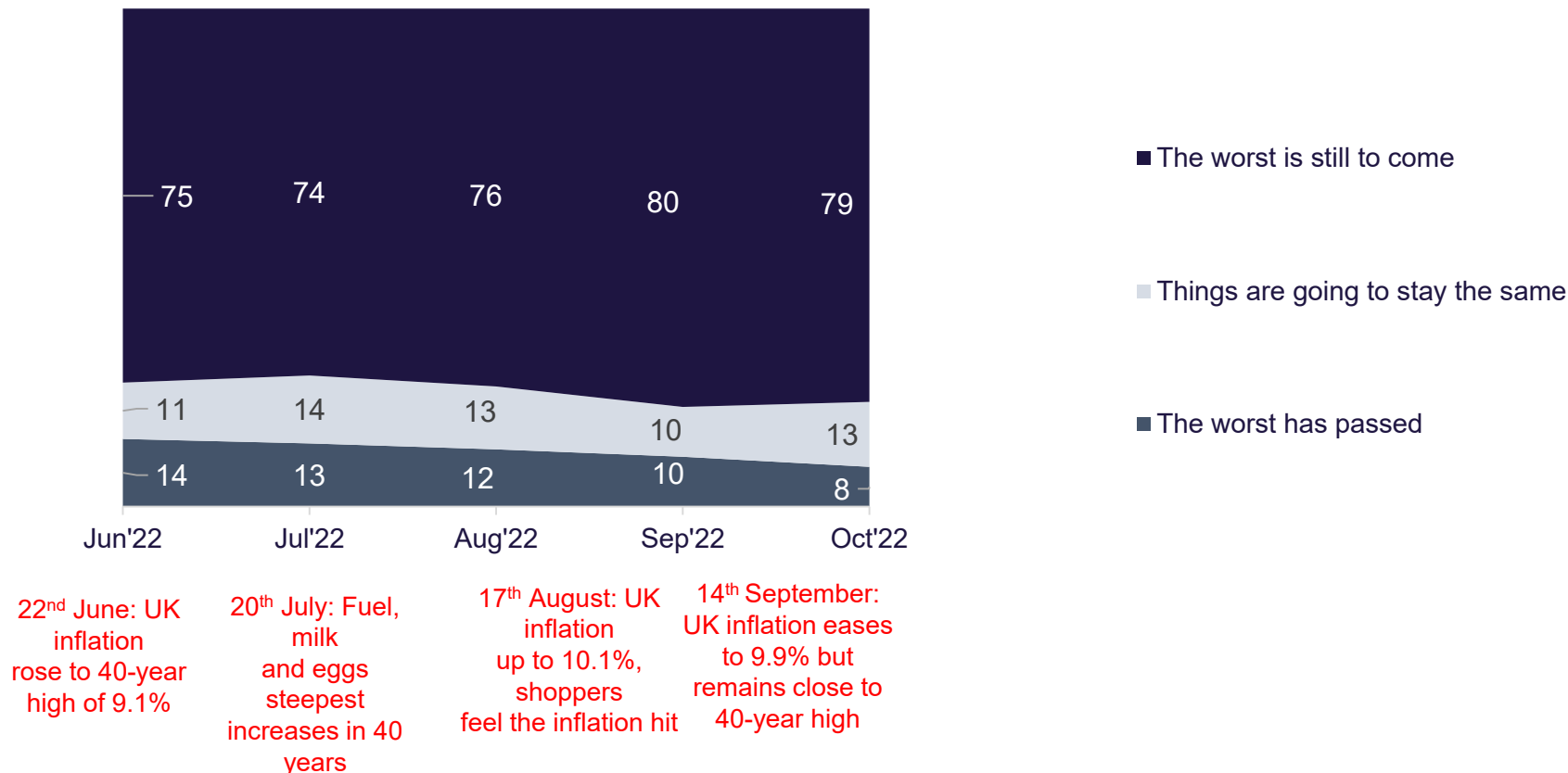
* Represents a statistically significant change on previous wave



1. Current General Sentiment

In October, the perceptions of the cost of living crisis remain at similar levels as in September, with almost 4 in 5 (79%) of UK adults think 'the worst is still to come'.

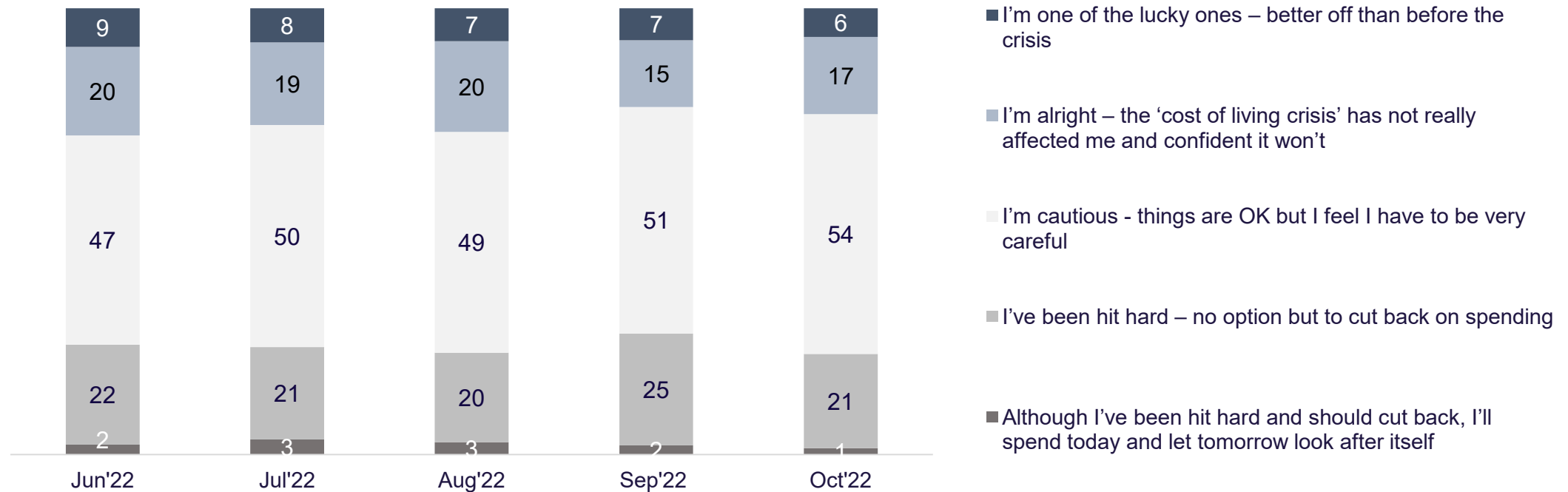
Figure 1. Perception of the situation with regards to cost of living crisis, Percentage, UK



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. October 2022 = 1,756

The majority of UK adults are either ‘cautious – being very careful’ or they have already been ‘hit hard’ by the cost of living crisis. And the proportion of those affected is growing.

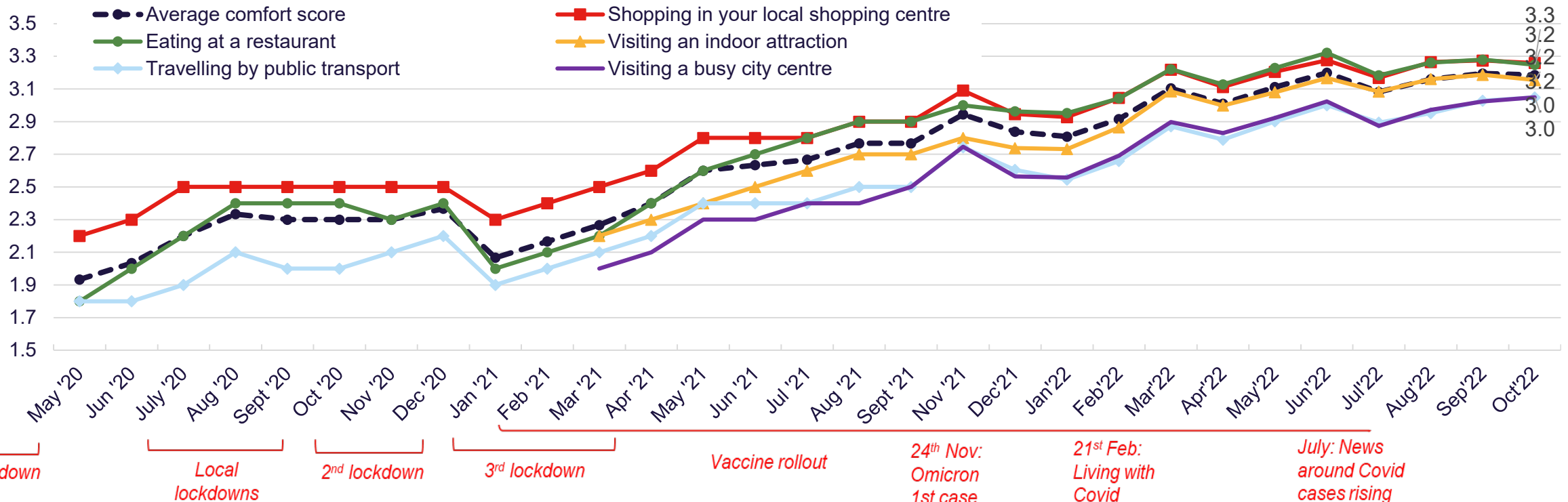
Figure 2. Feelings about situation during the ‘cost of living crisis’, Percentage, UK



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. October 2022 = 1,756

The comfort with all everyday activities seems to have stabilized. In October, the 'average comfort score' was at 3.2, which is in line with August and September data.

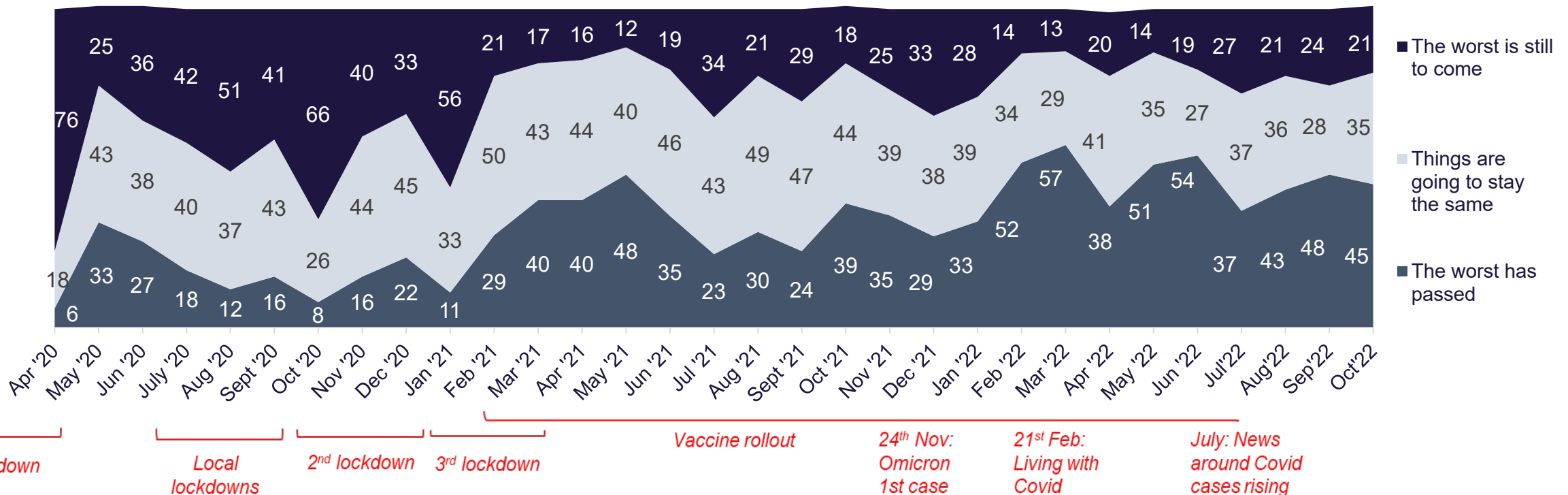
Figure 3. Level of comfort conducting a range of activities separately and combined, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, UK



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. October 2022 = 1,756 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

The perception of the Covid situation has stabilized too; 80% say either 'things are going to stay the same' or 'the worst has passed'.

Figure 4. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK

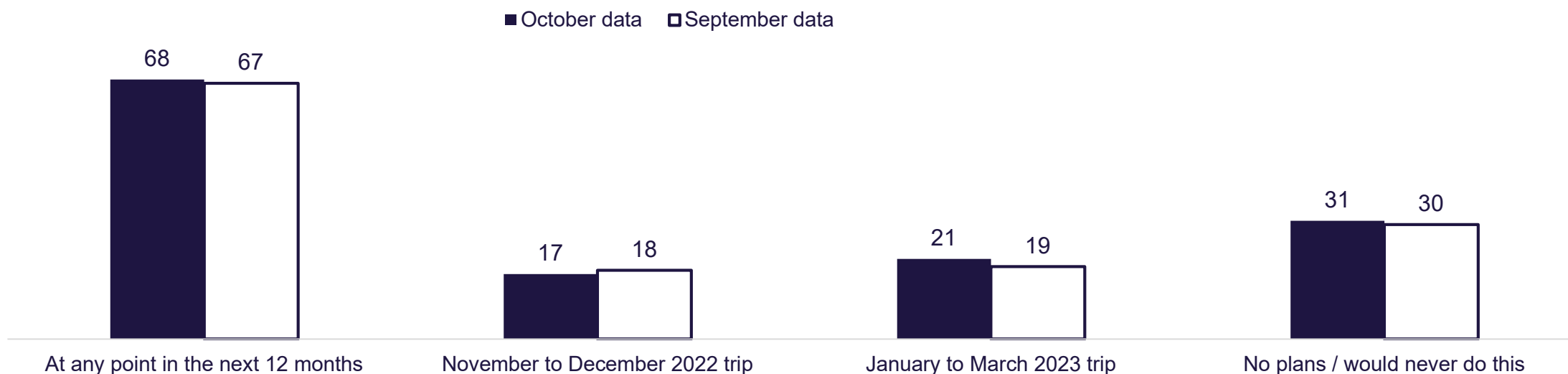


Question: Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. October 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base 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.

2. Trip Intentions: UK and overseas

68% of UK adults plan on taking an overnight domestic trip at some point in the next 12 months, which consistent with expectations in September.

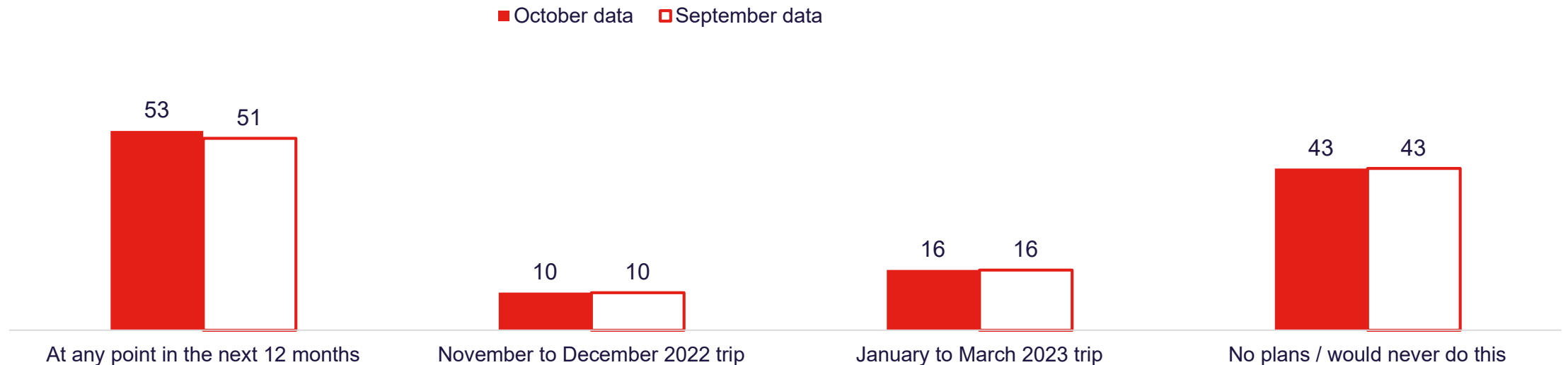
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, October 2022, UK



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. September 2022 = 1,758, October 2022 = 1,756. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Just over half (53%) of UK adults are anticipating an overnight overseas trip at some point in the next 12 months, relatively consistent with September intentions.

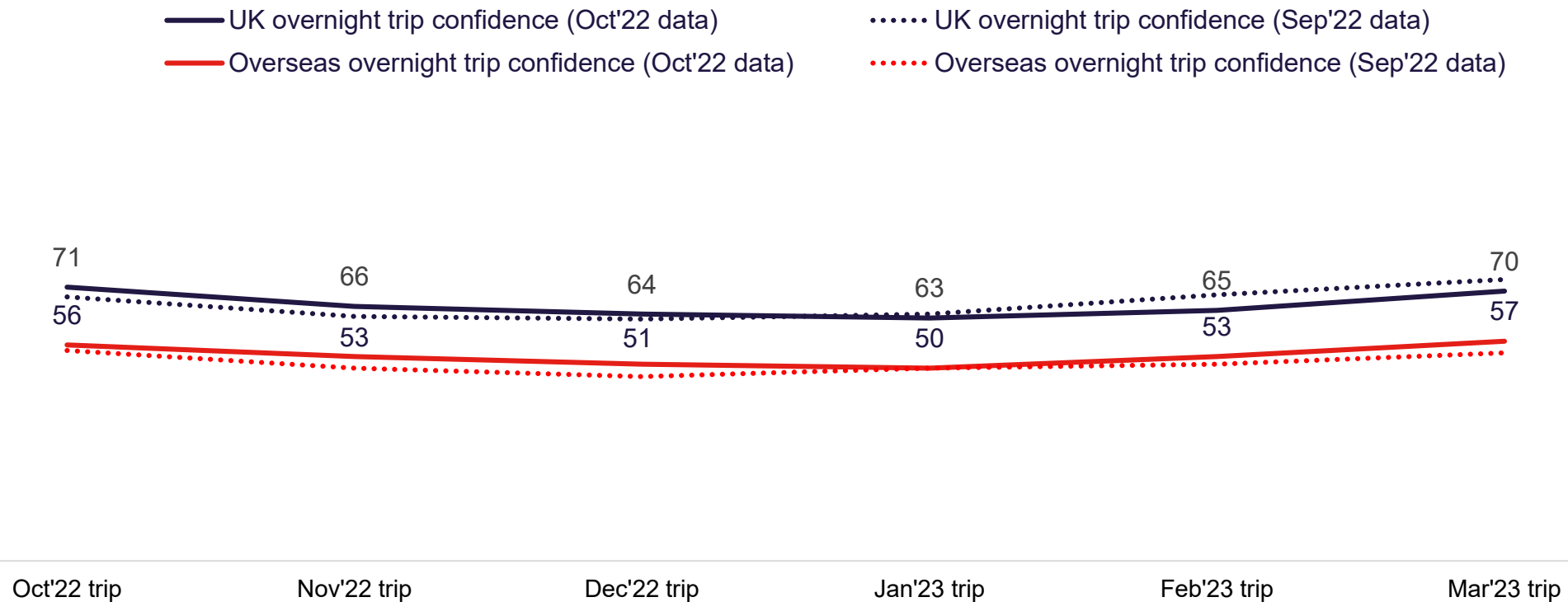
Figure 5b. Proportion anticipating going on any overnight overseas trips, Percentage, October 2022, UK



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. September 2022 = 1,758 and October 2022 = 1,756. 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 a trip over the coming months is higher for more immediate trips, then declines slightly for trips in November to February, and rises again in March.

Figure 6. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, September and October 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. September 2022 = 1,758 and October 2022 = 1,756.

The percentage intending to take more domestic and overseas overnight trips in the next 12 months compared to pre-pandemic has decreased in October. (Possibly linked to more UK adults being affected by the cost of living crisis and needing to be careful or even cut back.)

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

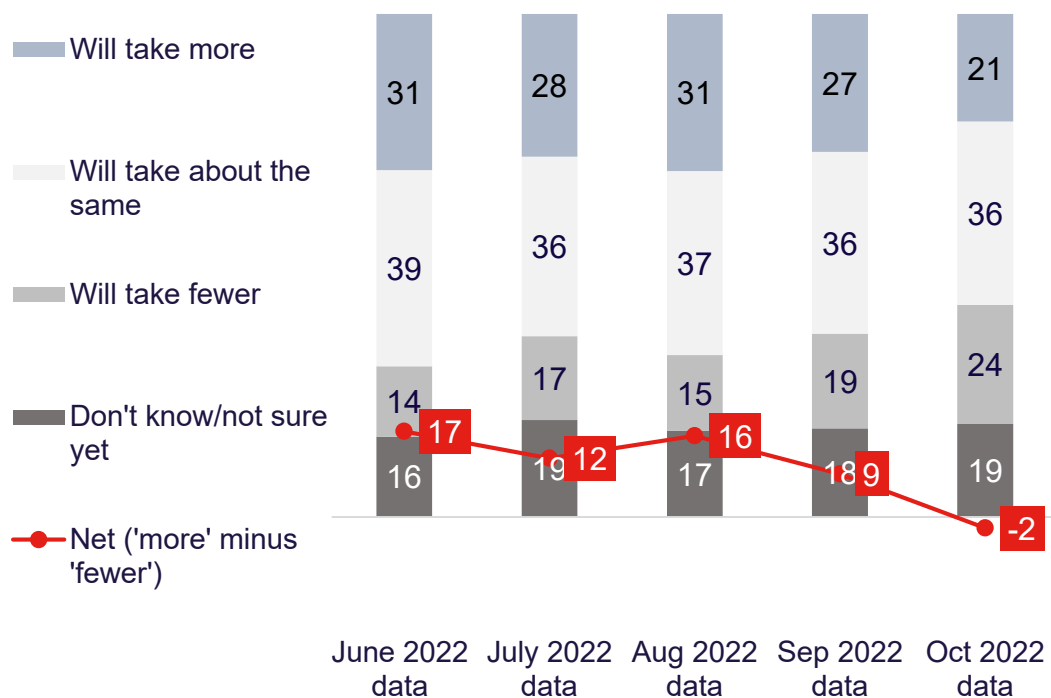
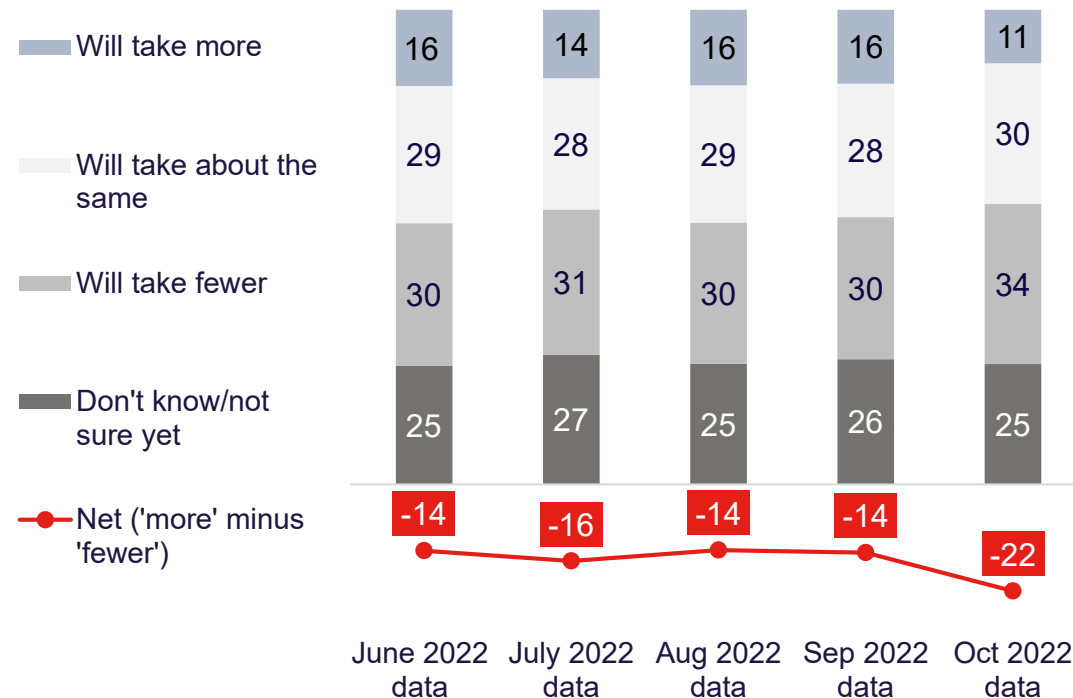


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to pre-pandemic, Percentage, October 2022, UK



32% of respondents indicated they are more likely to choose a UK trip than an overseas trip, compared to pre-pandemic. The top reason for domestic preference is 'UK holidays are easier to plan' (66%).

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



TOP 5 reasons for UK preference

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

TOP 5 reasons for Overseas preference

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

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

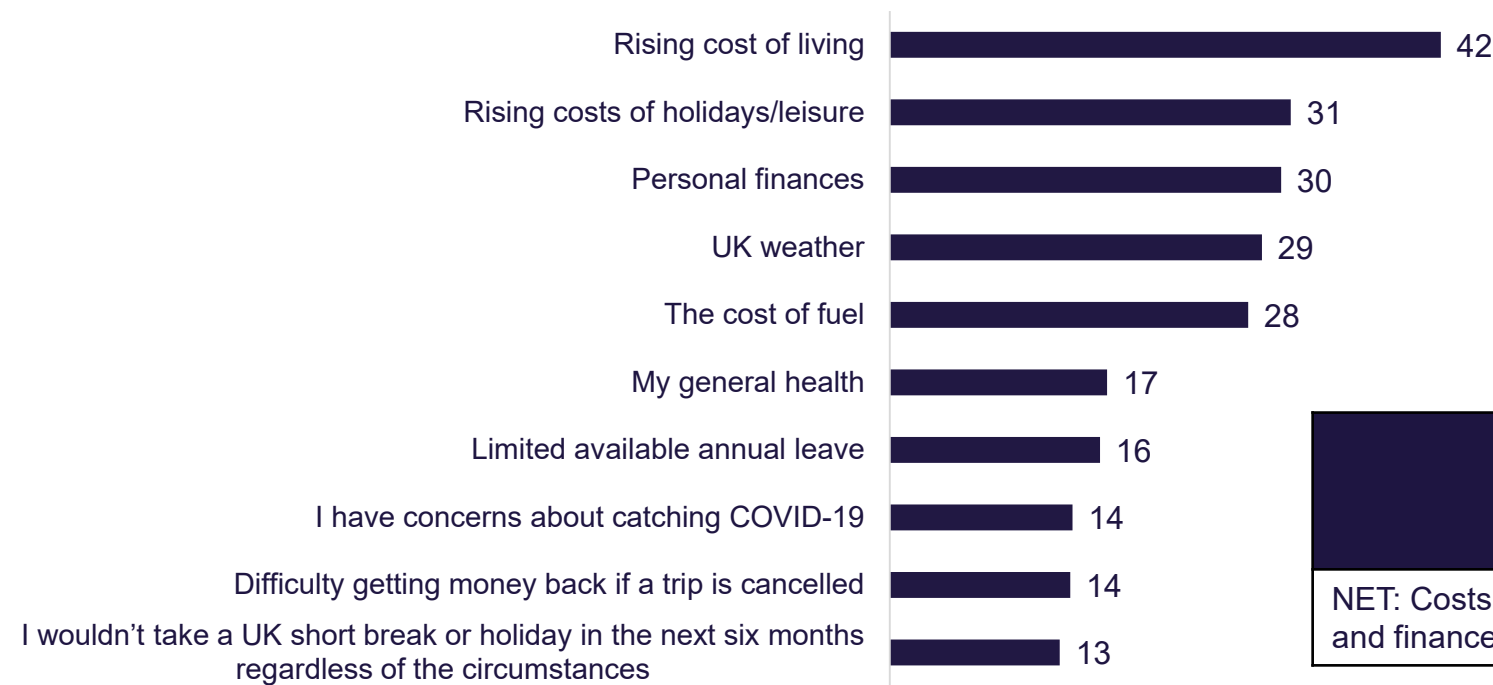
Question: VB2j. Thinking of the next 6 months, how different do you think your short break/holiday choices will be compared to before the COVID-19 pandemic?

Base: All respondents. October 2022 = 1,756. VB2k. Why are you more likely to choose a UK trip than an overseas trip compared to before the pandemic?

October 2022 = 587, VB2l. Why are you more likely to choose an overseas trip than a UK trip compared to before the pandemic? October 2022 = 418

The top potential barrier to taking overnight UK trips in the next 6 months is the ‘rising cost of living’ (42% stating this), followed by ‘rising costs of holidays/leisure’ (31%) and ‘personal finances’ (30%).

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



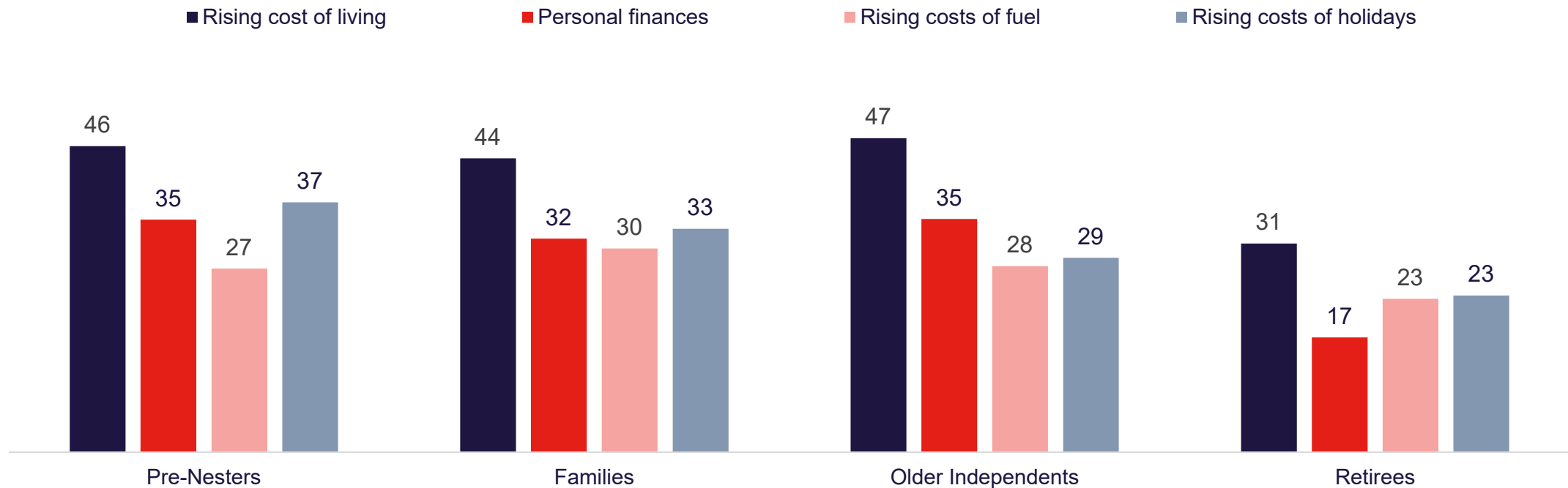
	June 2022 data	July 2022 data	August 2022 data	September 2022 data	October 2022 data
NET: Costs and finances	67%	64%	60%	62%	62%

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. October 2022 = 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’

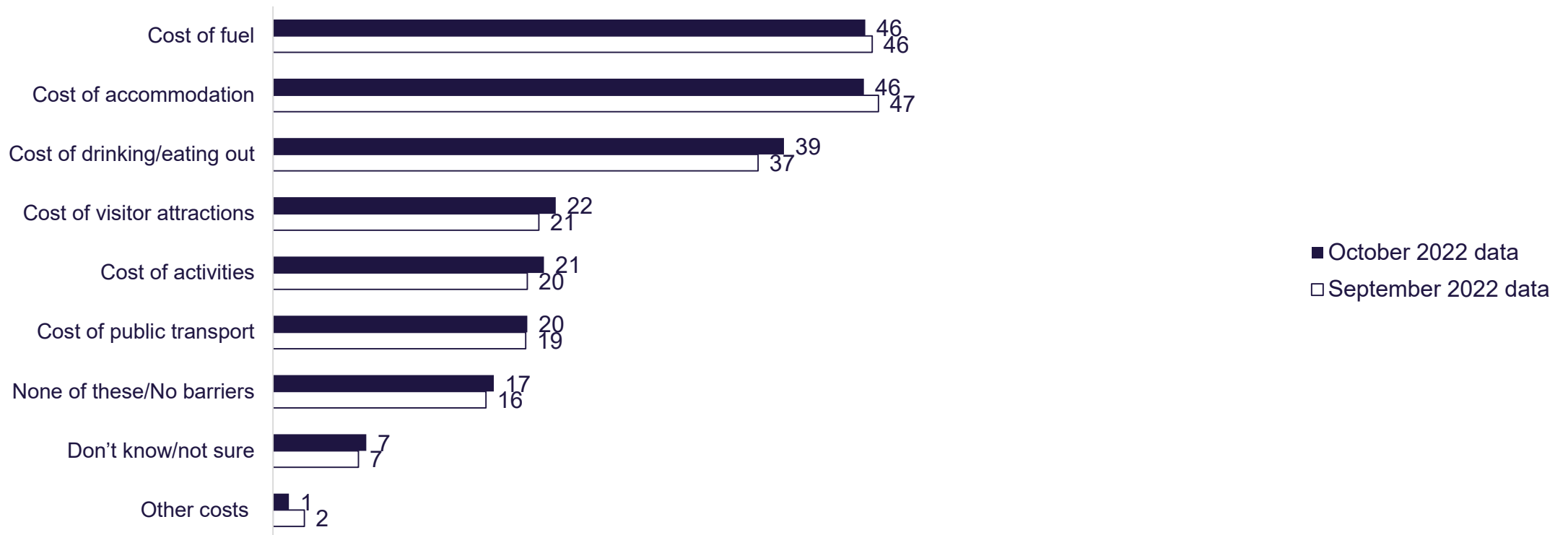
The 'rising cost of living' is the top financial barrier across all life stages.

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



Focusing on costs related to overnight trips, ‘cost of fuel’ and ‘cost of accommodation’ are the joint top barriers to taking overnight UK trips in the next 6 months (46%).

Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Percentage, October 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: September 2022 = 1758 and October 2022 = 1756.

As a result of the cost of living crisis, UK adults are likely to cut spend on their overnight trip in the UK in a variety of ways: saving on accommodation, activities or eating out.

Figure 13a. 'Cost of living' impact on UK holidays and short breaks, Percentage, October 2022, UK, Full list



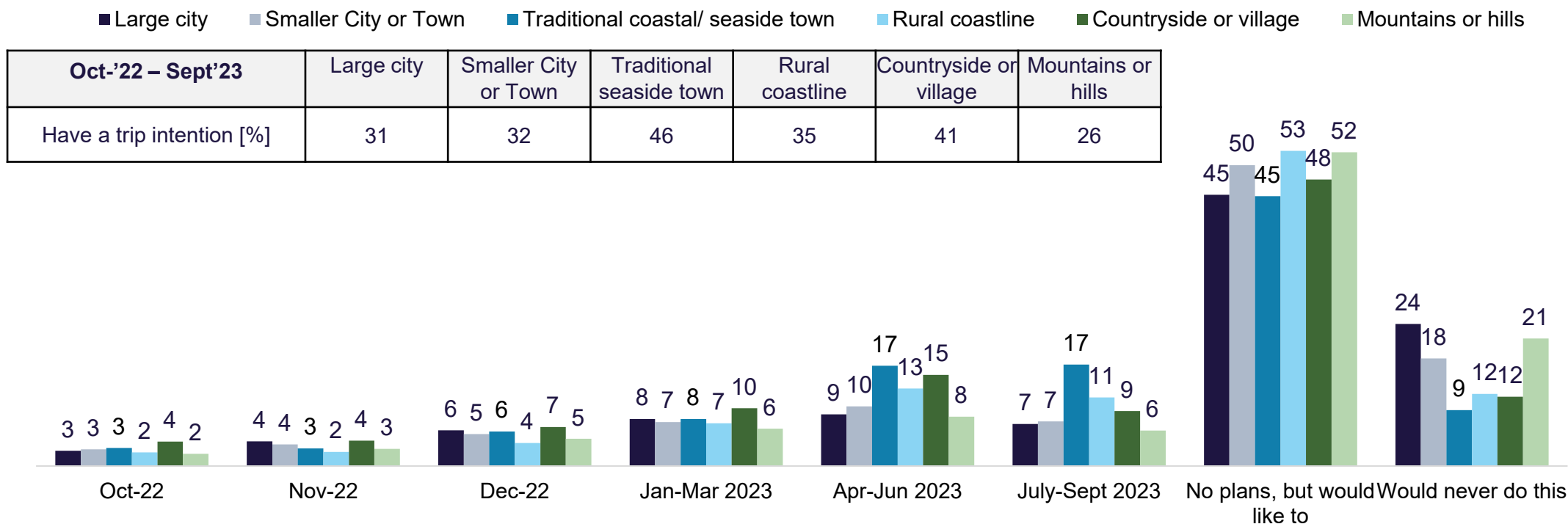
While in regards to day trips, 30% of UK adults say they will take fewer day trips (only 20% said they will go on fewer overnight trips). Others will cut on spending on their UK day trip by looking for free activities or spending less on eating out.

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



The top destination type for an overnight domestic in in the coming months (October to March) is ‘countryside or village’. From April 2023 to September 2023 it is ‘traditional coastal/seaside town’.

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



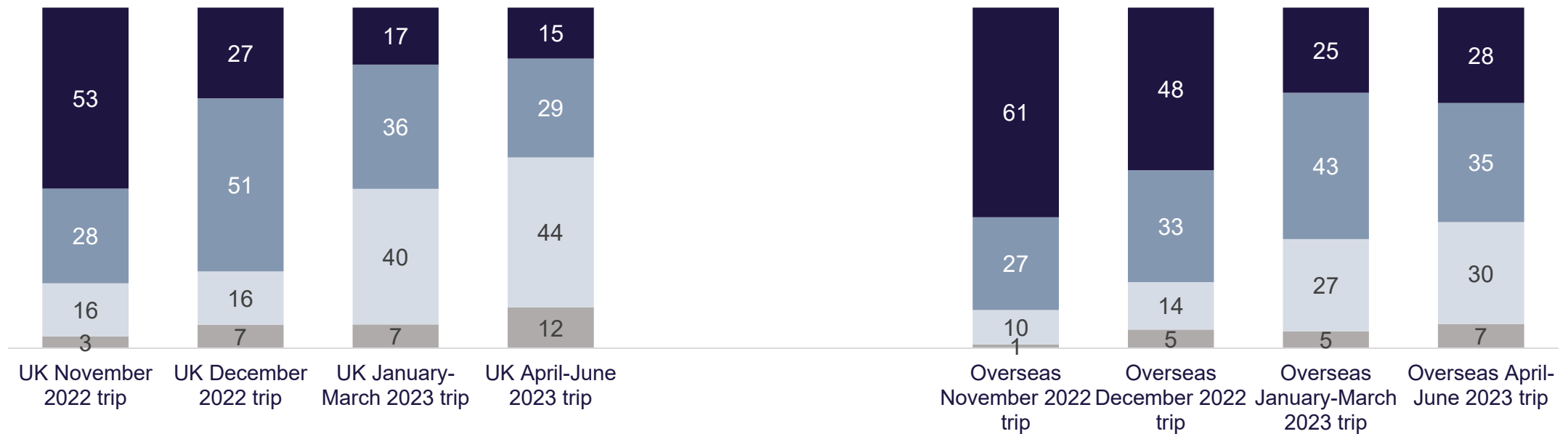
Question: VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? Please select all possible occasions, not just the next one. Base: October 2022 = 1,756.

3. The Next Trip: Overnight and Day Trips

The majority (61%) of intenders have already booked their overseas trips in November. For UK trips, just over half (53%) have already booked their trip with 28% decided but yet to book.

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

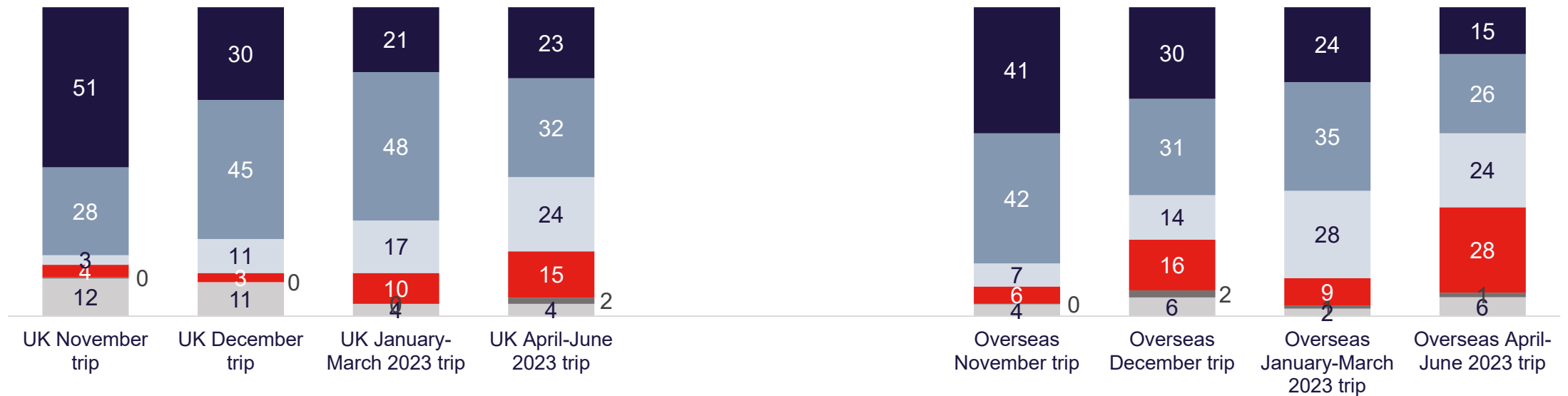


Question: VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>? UK trip: November 2022 n = 106, December 2022 n = 128, January-March 2023 n = 245, April-June 2023 n = 331. VB2g. Which of the following best describes how close you are to booking your next overnight OVERSEAS trip in <INSERT MONTH FROM VB2c(III)>? Base: Overseas trip: November 2022 n = 67, December 2022 n = 89, January-March 2023 n = 209, April-June 2023 n = 264.

51% of UK adults will have booked their domestic November trip within 1 month of going on the trip, while 41% will have booked their overseas November 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, October 2022, UK

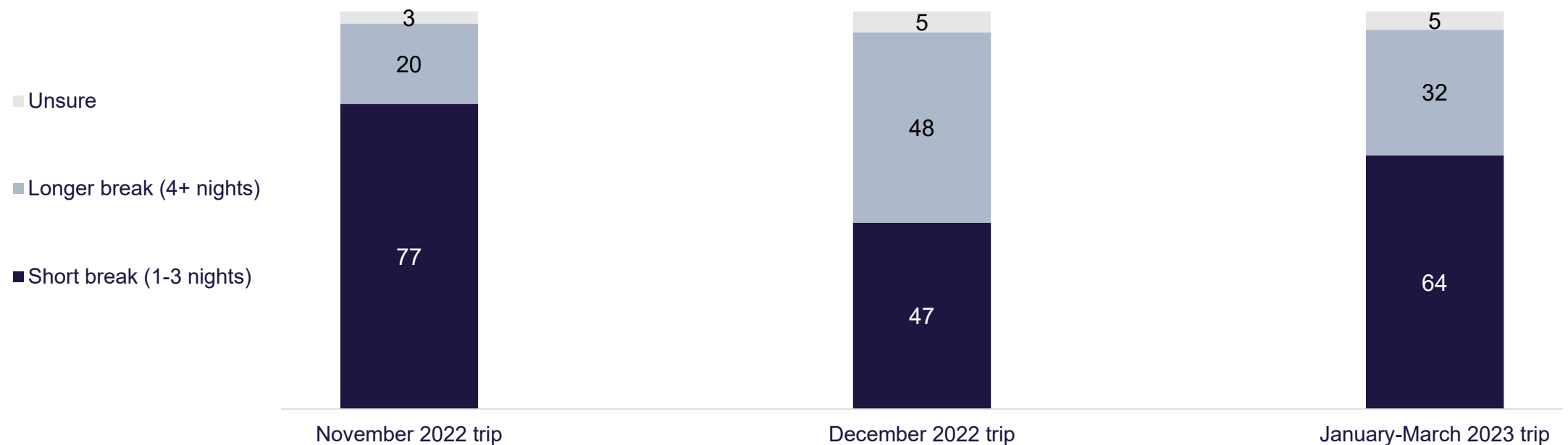
■ Up to 1 month ■ More than 1 month - 3 months ■ More than 3 months - 5 months ■ More than 5 months ■ I am unlikely to book in advance ■ Don't know/Not sure



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: November 2022 n = 106, December 2022 n = 128, January-March 2023 n = 245, April-June 2023 n = 331. 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: November 2022 n = 67, December 2022 n = 89, January-March 2023 n = 209, April-June 2023 n = 264.

Short breaks are significantly more common than longer breaks in November 2022. In December, there is a fairly equal split between short and long breaks intended, while from January to March 2023 short breaks make up a majority.

Figure 17. Length of next UK holiday or short break by time period, Percentage, October 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 October 2022 respondents intending to take next holiday or short break in each time period: UK trip 2022-2023: November n =106, December n = 128, January-March 2023 n = 245 *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

The South West and London are the joint most preferred UK overnight destinations between October to December 2022 (15% planning a trip there), while from January to March 2023 the top destination is London (18% intending to a trip there).

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

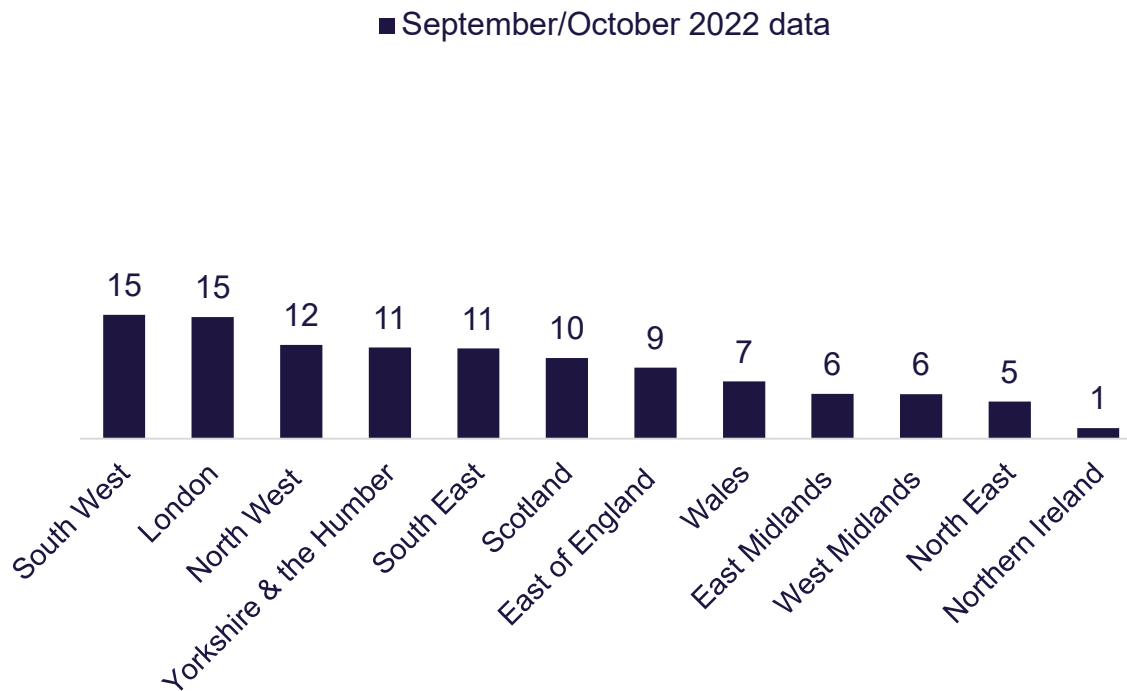
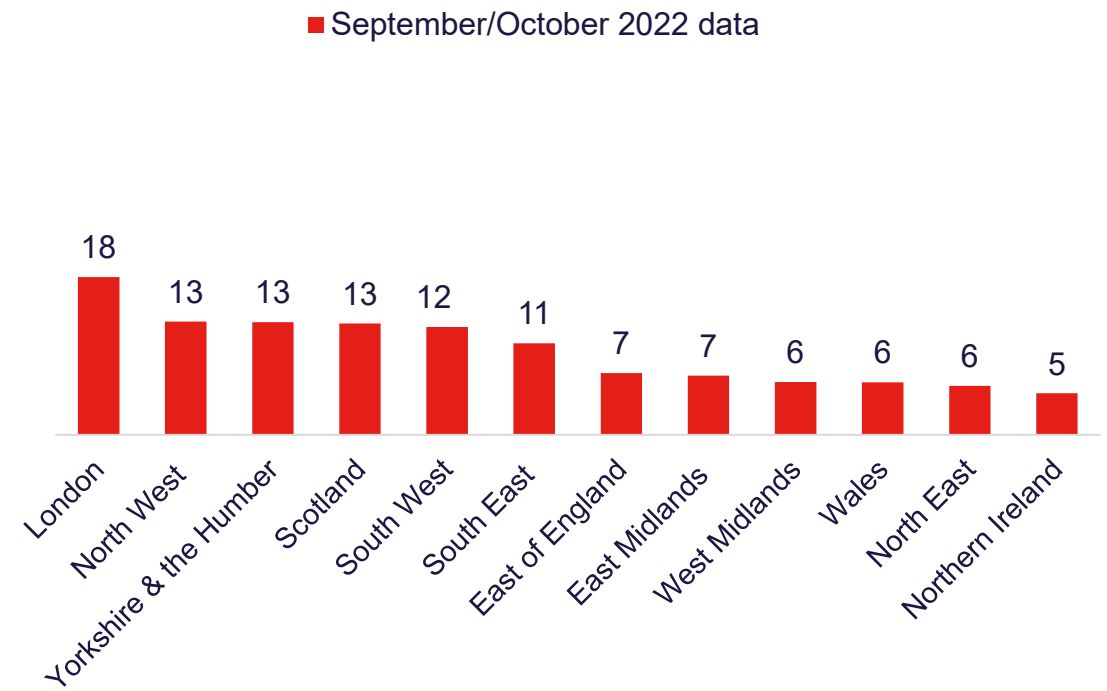


Figure 19. Where planning on staying on next UK overnight trip in January to March 2023, Percentage, September to October 2022, UK



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

Base: All September to October respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 792, January to March 2023 n = 416. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

51% are intending to travel to their October to December trip destination using their own car, while 46% are planning to do so for their January to March 2023 trip. Train is the second most preferred transport type in both time periods.

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

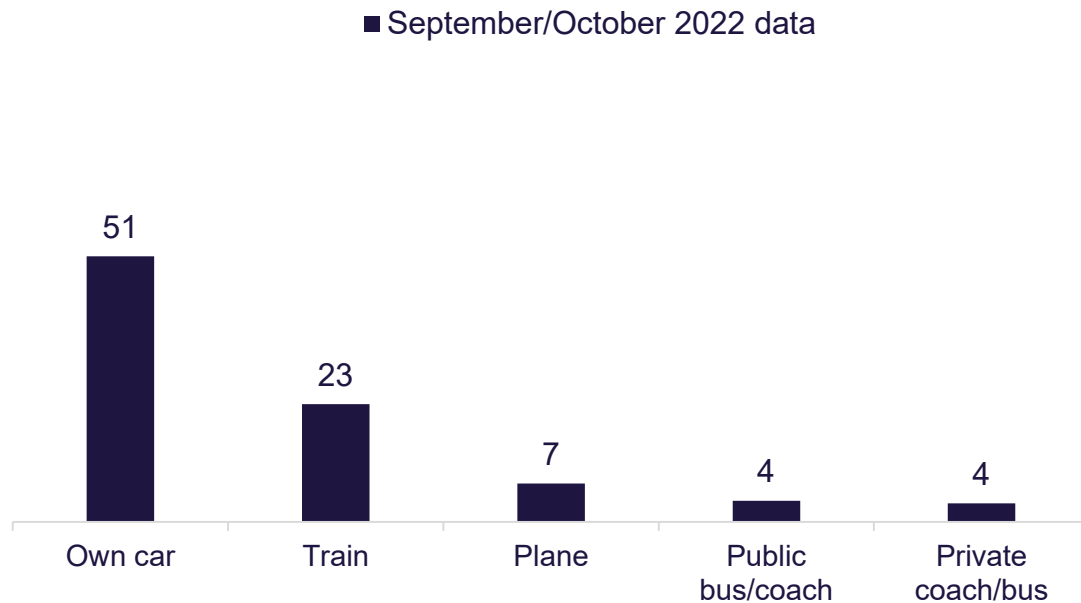
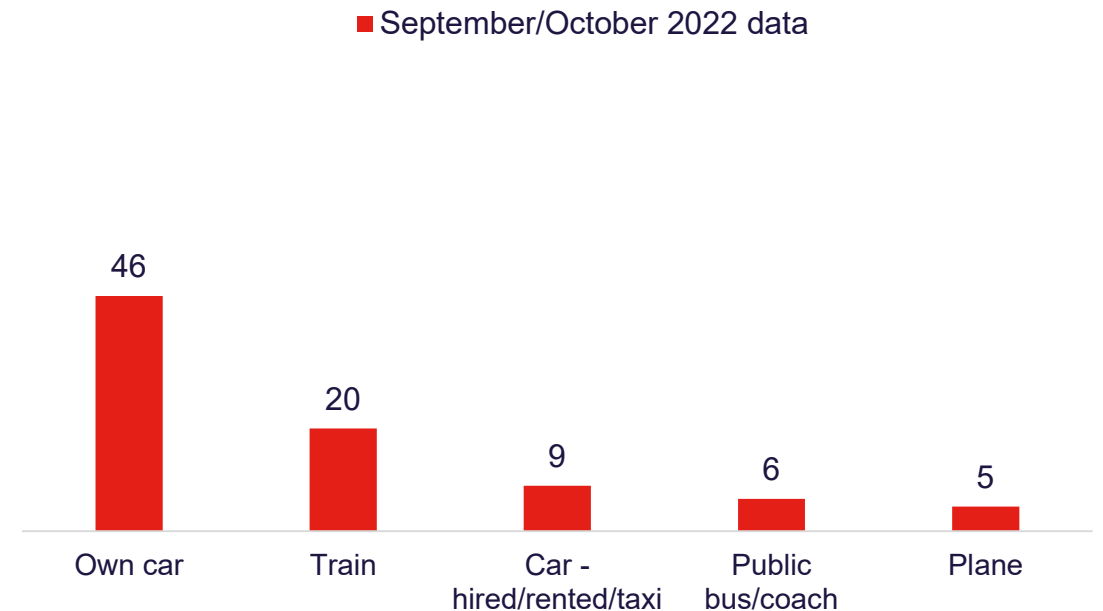


Figure 21. Top 5 main modes of travel to destination for overnight trip in January to March 2023, Percentage, September to October 2022, UK



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 September to October respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 792, January to March 2023 n = 416. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

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, September to October 2022, UK

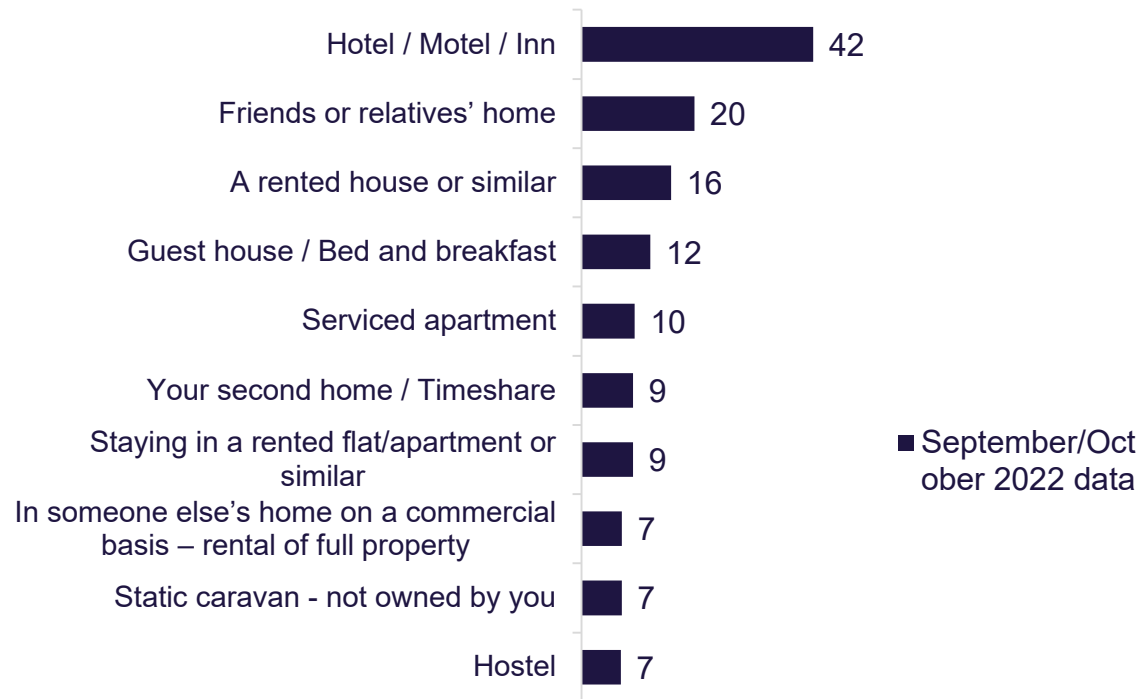
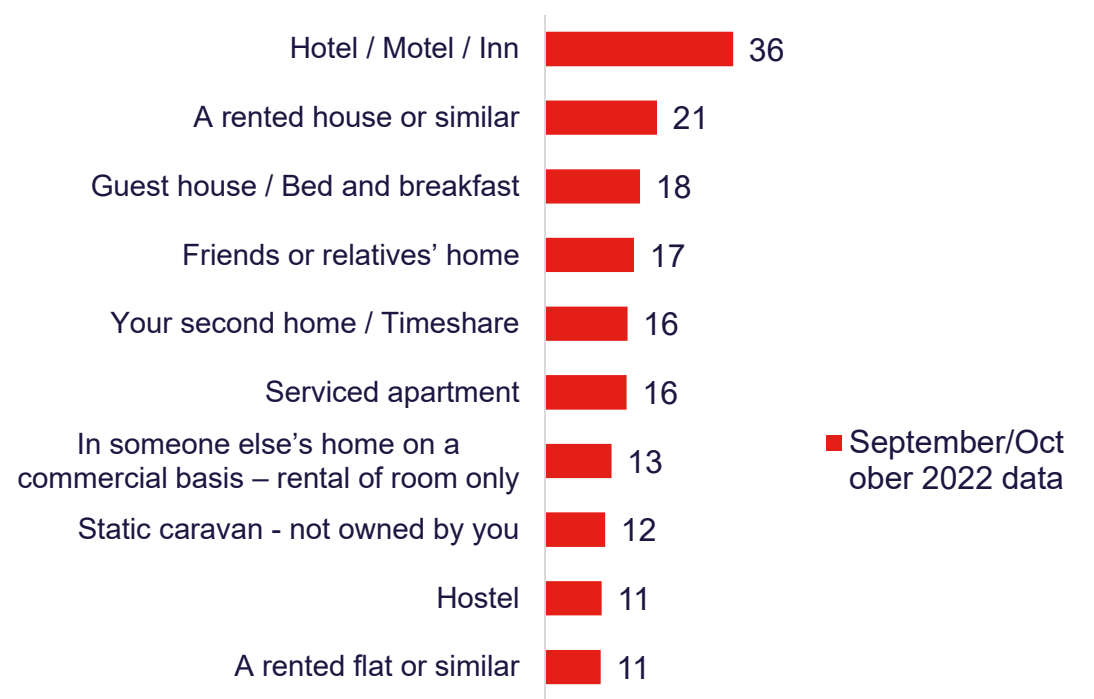


Figure 23. Top 10 accommodation types planning on staying in on next UK overnight trip in January to March 2023, Net Percentage, September to October 2022, UK



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 September to October respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 792, January to March 2023 n = 416. See tables for full breakdown. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

‘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, September to October 2022, UK

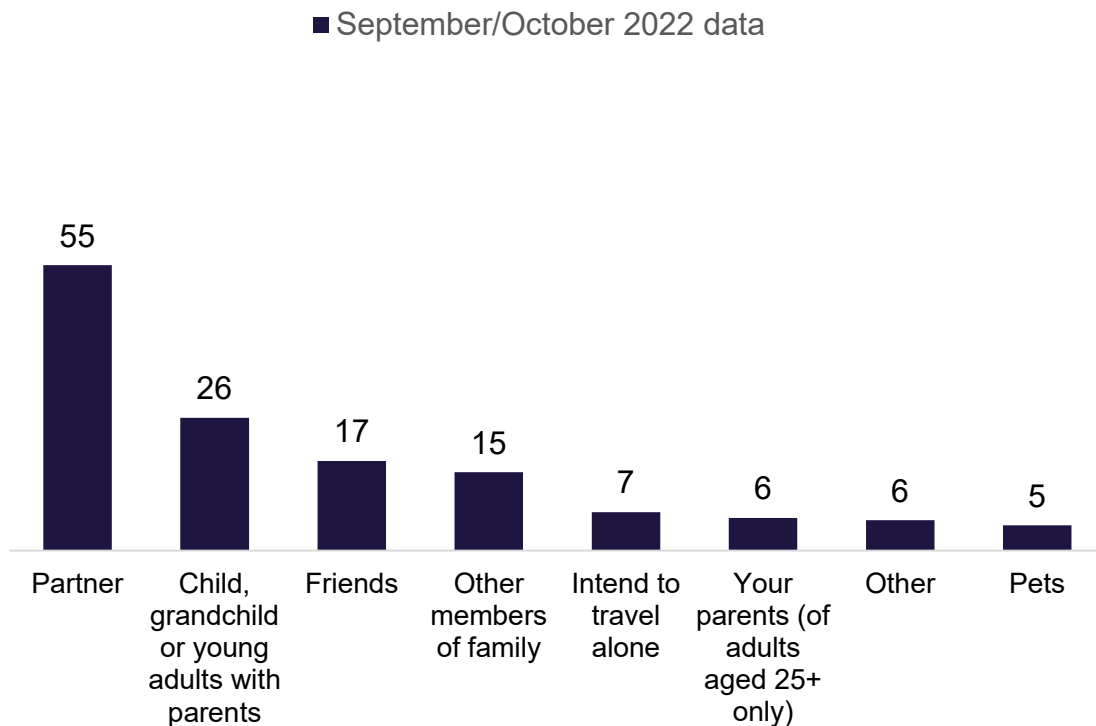
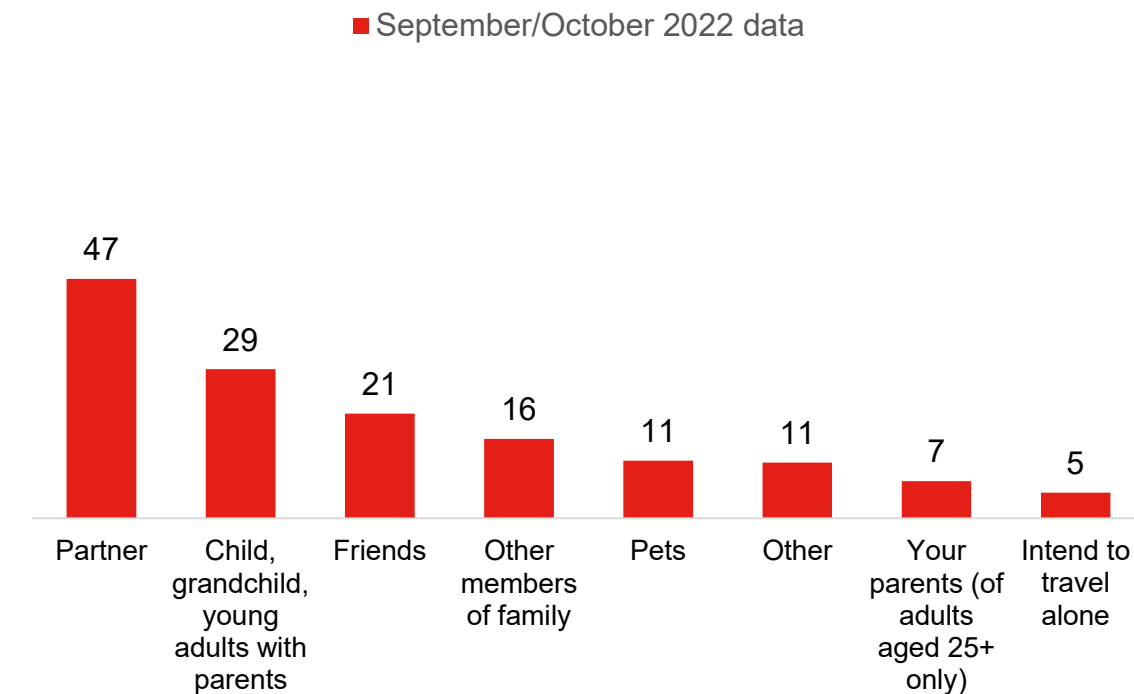


Figure 25. Visitor party make-up for trips taken from trip in January to March 2023, Percentage, September to October 2022, UK



Question: QVB4d. With whom are you likely to be spending your holiday?

Base: All September to October respondents planning on taking a holiday or short break in the UK between October to December 2022 n = 792, January to March 2023 n = 416. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types. *A 2021 comparison is not possible due to the equivalent fieldwork period not available due to a pause between September and November 2021 last year.

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’.

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



Figure 27. Motivations for UK holidays and short breaks in January-March 2023, Percentage, October 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 = 373, January to March 2023 n = 245.

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

The top two intended activities between October and December 2022 are ‘trying local food and drink’ and ‘visiting heritage sites’, while in January-March 2023 ‘walking and hiking’ is the leading activity followed by ‘trying local food and drink’.

Figure 28. Activities for UK holidays and short breaks, in October-December 2022, Percentage, October 2022, UK, Full list



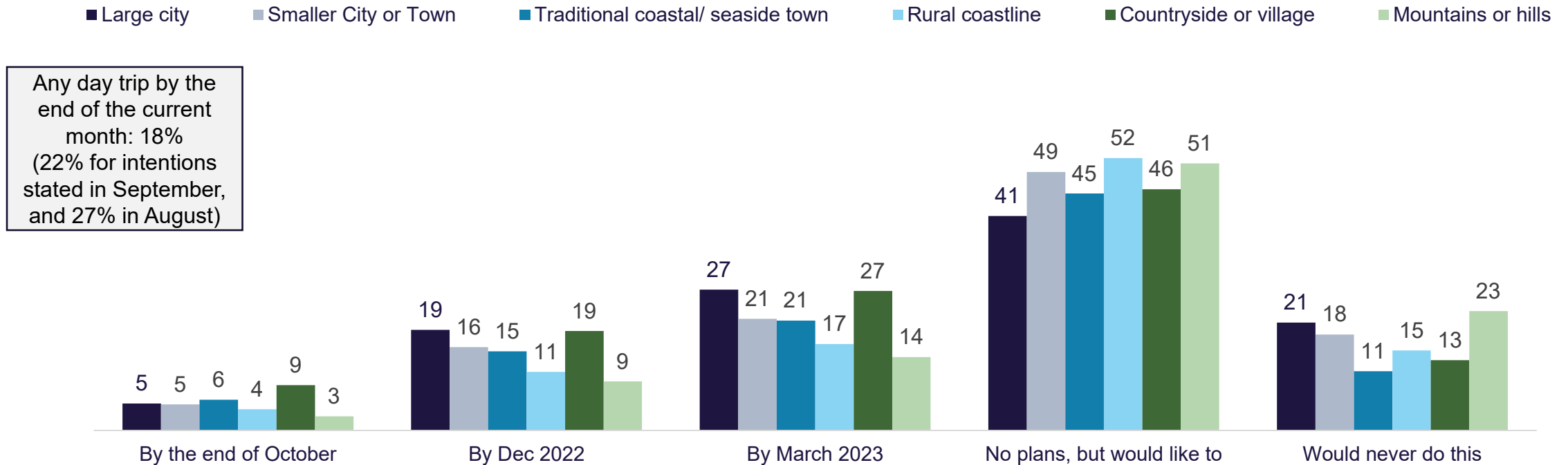
Figure 29. Activities for UK holidays and short breaks in January-March 2023, Percentage, October 2022, UK, Full list



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 = 373, January to March 2023 n = 245. Note:
 Multiple choice question. Totals may exceed 100%.

18% of UK adults intend to take a day trip of any type by the end of October, down on figures reported in the last two months. 'Countryside or village' is the top destination type for a day trip, followed by 'large city' for day trips up to March 2023.

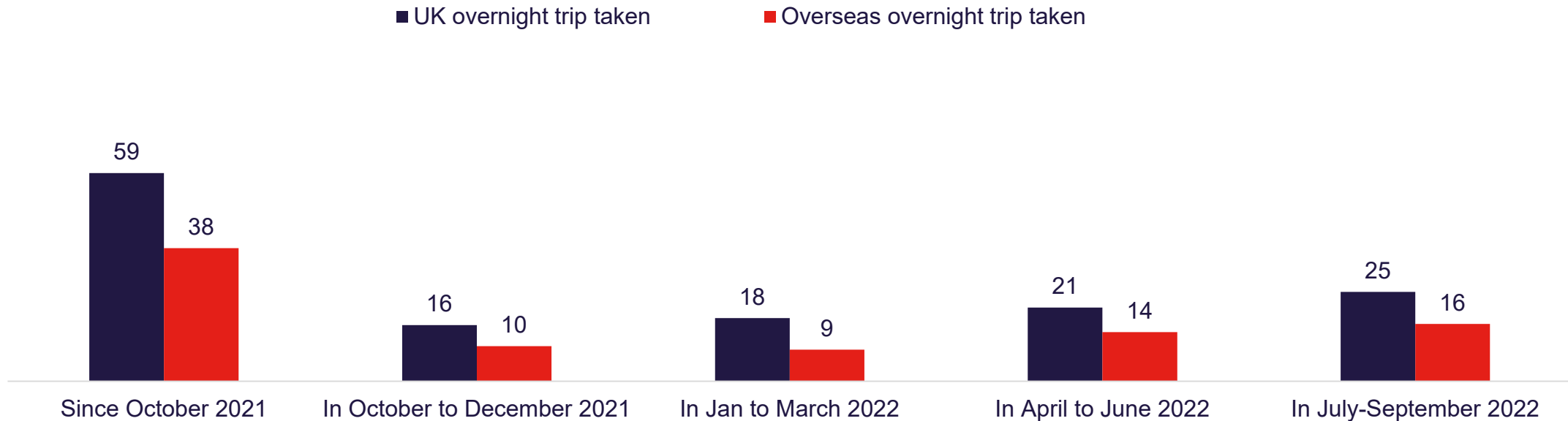
Figure 30. Next UK day trip intention between October 2022 and March 2023, Cumulative percentages, October 2022, UK



4. Past UK and Overseas Trips

Nearly 6 in 10 (59%) have taken a UK overnight trip since October 2021, higher than those that have taken an overseas overnight trip in that period (38%).

Figure 31. Proportion taken an overnight UK or overseas trip in below time period, Percentage, October 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. October 2022= 1,756

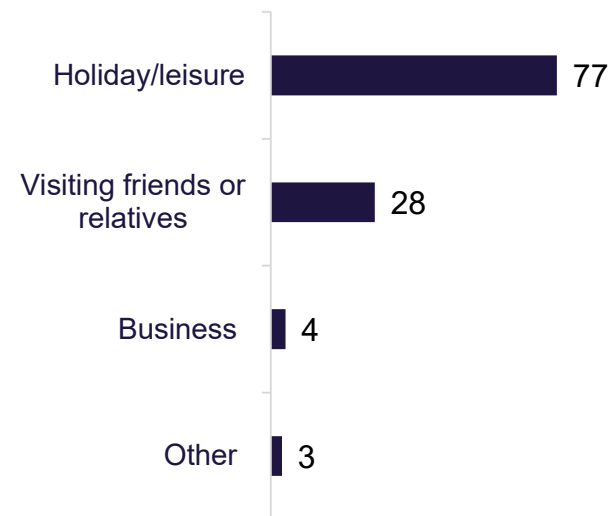
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

The South West of England was the most popular destination for trips in the past three months, 26% of trip takers having stayed there. 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, October 2022, UK



Figure 33. Purpose of overnight UK trip taken in the past three months, Percentage, October 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 October respondents that took an overnight trips in the last three months n= 483

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

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

82% of UK adults interviewed are in employment

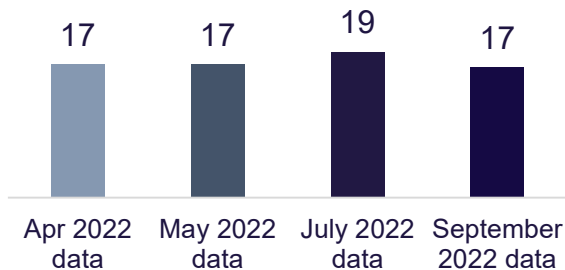
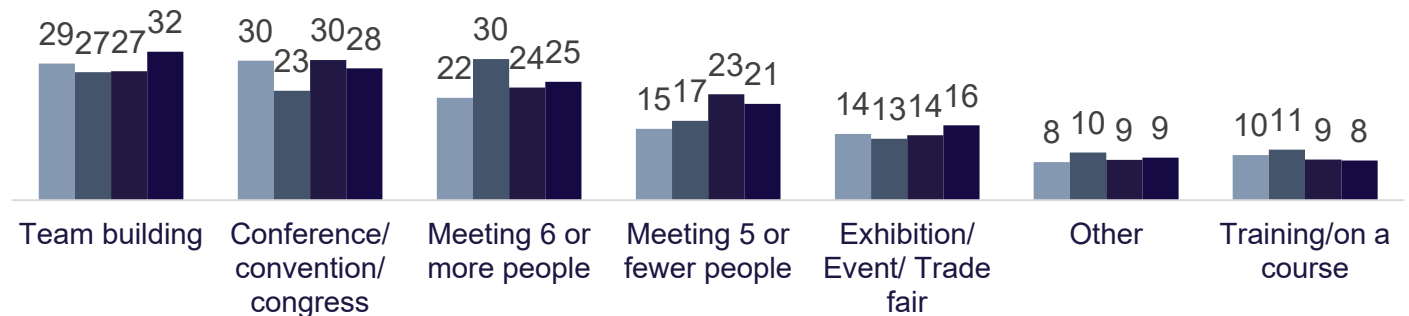


Figure 35. Reasons for taking an overnight business trip in next 3 months, Percentage, October 2022, UK adults in employment planning a trip

■ Apr 2022 data ■ May 2022 data ■ July 2022 data ■ September 2022 data



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 October 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.

