

Domestic Sentiment Tracker: Profiling Report

Published: April 2023

Fieldwork Period: January to March 2023

UK Results

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Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a monthly COVID-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken.

The tracker was conducted weekly for 13 consecutive weeks from May 2020 to August 2020, fortnightly from September 2020 to September 2021, and monthly from November 2021 onwards. Each wave is based on a UK nationally representative sample of c1,500 adults aged 16+, with a boost sample for Scotland and Wales.

This report is a deep dive into those who are looking to take a trip in spring and summer as well as more details on demographic differences than the monthly report.

The findings in this report are based on aggregating data from the January to March 2023 fieldwork. Fieldwork periods are as follows: January (3rd to 10th); February (1st to 7th); March (1st to 9th).

Definitions used within this report (1)

Chapter 2 in this report looks at trip Intenders with the following definitions:

1. **Spring Intenders:** UK adults who intend to take a domestic overnight trip between April and June 2023
2. **Summer Intenders:** UK adults who intend to take a domestic overnight trip between July and September 2023
3. **Non-Intenders:** UK adults who do not currently intend to take any short breaks or holidays of 4+ nights over the next year

Chapter 3 looks at the profile and behaviour of **Spring and Summer Intenders by destination type**. The Spring and Summer seasons were emerged to build reliable base sizes. All individual destination types have sufficient base sizes to show each destination type's profile. Destination types included:

- Traditional coastal/ seaside town
- Countryside or village
- Rural coastline
- Smaller city or town
- Large city
- Mountains or hills

Definitions used within this report (2)

Chapter 4 looks at Spring and Summer intentions by destination region. The Spring and Summer seasons were emerged to ensure each region has reliable base sizes. All destination regions (below) are included.

- North West
- North East
- Yorkshire and The Humber
- West Midlands
- East Midlands
- East of England
- London
- South East
- South West
- Scotland
- Wales

Definitions used within this report (3)

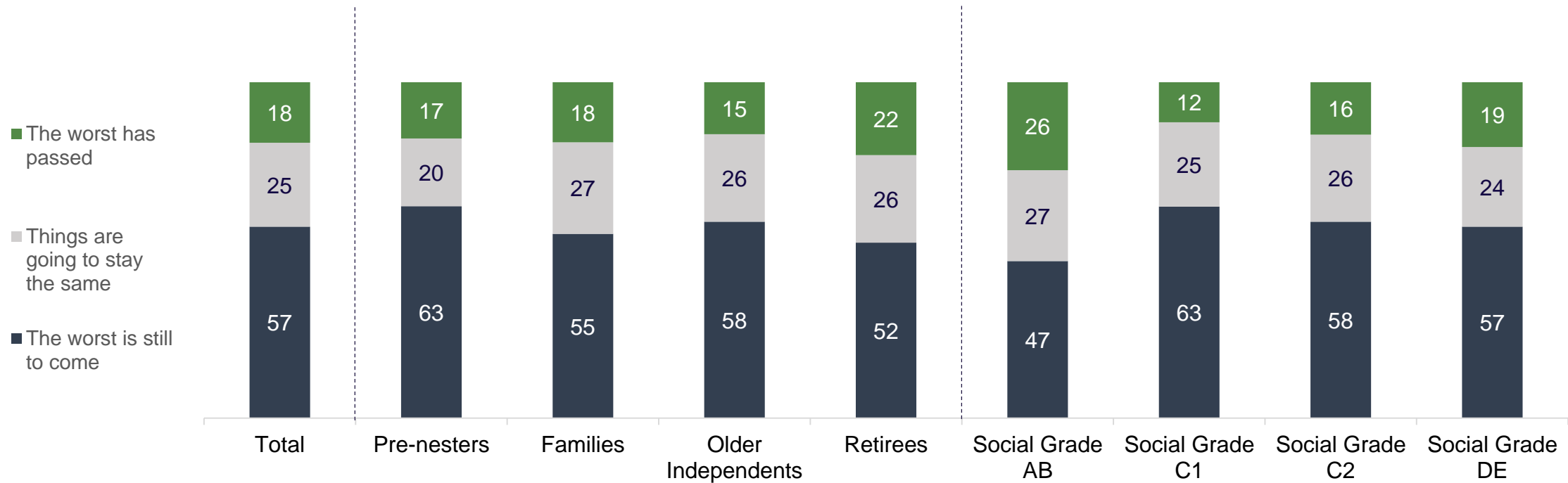
To deliver clearer profiles, we also segment by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **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+.

1. The Rising Cost of Living and Covid

As of March, nearly 3 in 5 think ‘the worst is still to come’ in relation to the cost-of-living crisis, with retirees and ABs the least pessimistic.

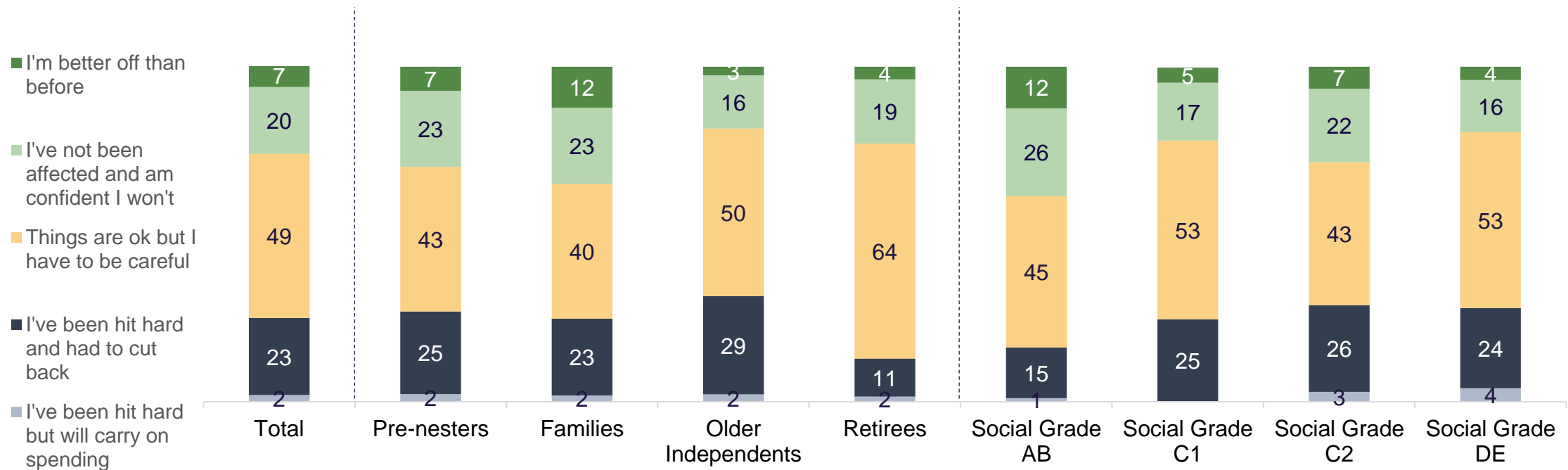
Figure 1. Perception of the situation with regards to the cost of living crisis by life stage, March data, Percentage, UK



Q7: 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: Total. n=1,755. Pre-Nesters n=382; Families n=627; Older Independents n=525; Retirees n=221; Social Grades AB n=508; C1 n=386; C2 n=370; DE n=582

Around half think ‘things are ok but I have to be careful’ in relation to the cost-of-living crisis. Those in C2/DE social grades and Older Independents are more likely to have been ‘hit hard’.

Figure 2. Breakdown of residents by financial segments in relation to the cost-of-living crisis, Percentage, March data, UK

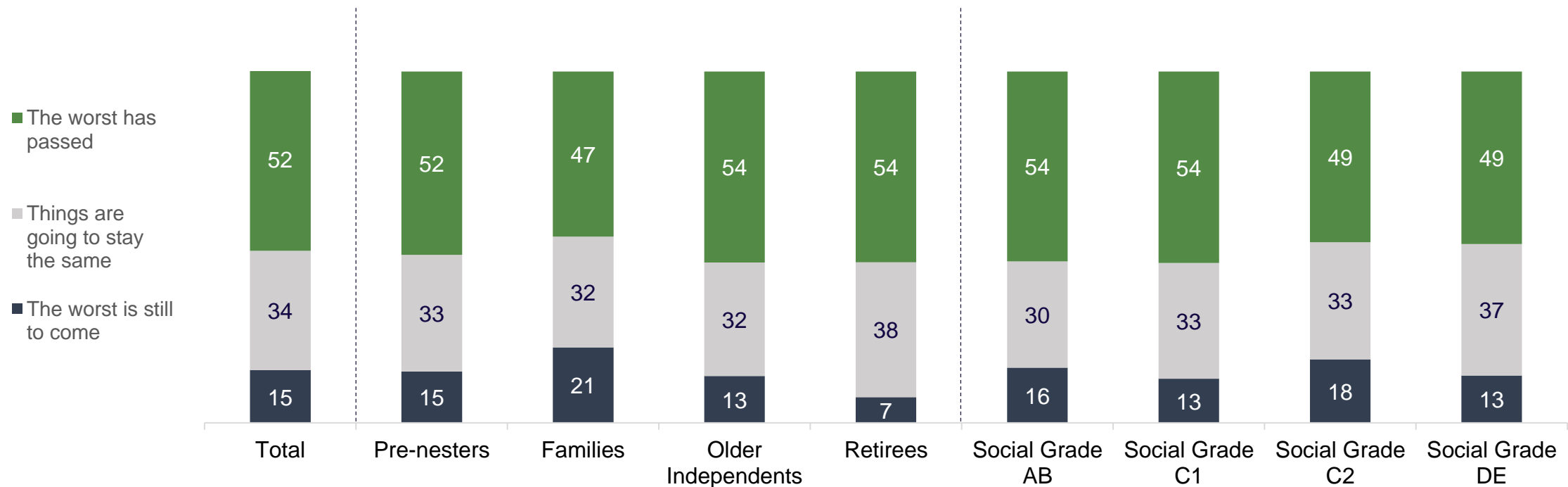


Q17: There has been a lot of talk about how the ‘cost of living crisis’ has affected people’s financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?

Base: Total. n=1,755. Pre-Nesters n=382; Families n=627; Older Independents n=525; Retirees n=221; Social Grades AB n=508; C1 n=386; C2 n=370; DE n=582

The majority of all life stages and social grades think ‘the worst has passed’ or ‘things are going to stay the same’ in relation to Covid.

Figure 3. Perception of the situation with regards to COVID-19 by life stage, March data, Percentage, UK

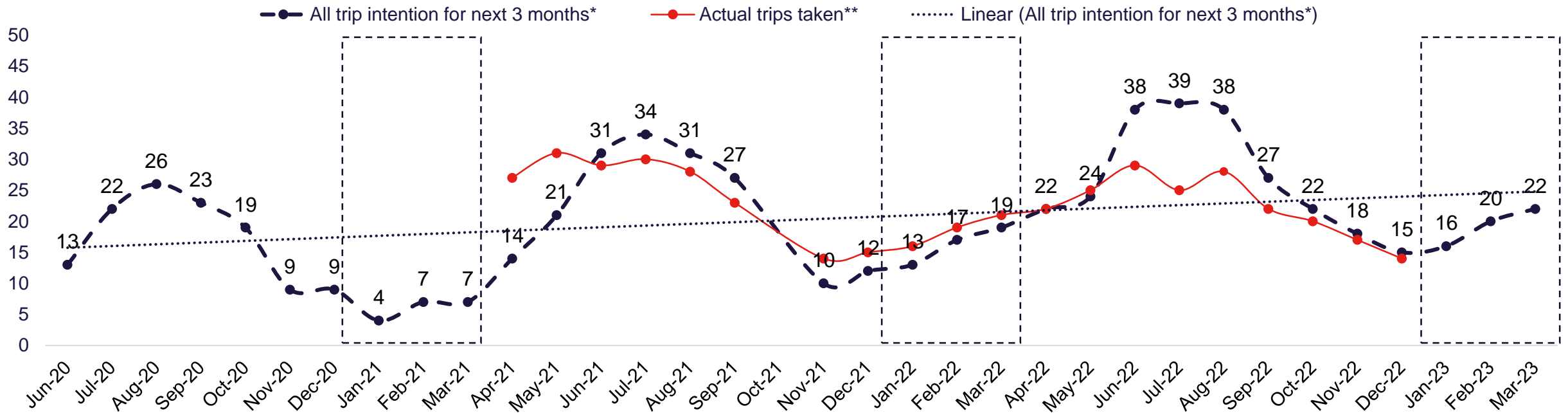


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: Total. n=1,755. Pre-Nesters n=382; Families n=627; Older Independents n=525; Retirees n=221; Social Grades AB n=508; C1 n=386; C2 n=370; DE n=582

2. Spring and Summer Intenders Profile

As of March, over 1 in 5 anticipate taking a UK short break or holiday in the next 3 months – higher than intention in the equivalent periods in 2022 and 2021.

Figure 4. Incidence of UK short breaks or holidays intended within next 3 months, Percentage wave-on-wave, UK



VB2a. Thinking of the next UK overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All UK respondents. n=1776

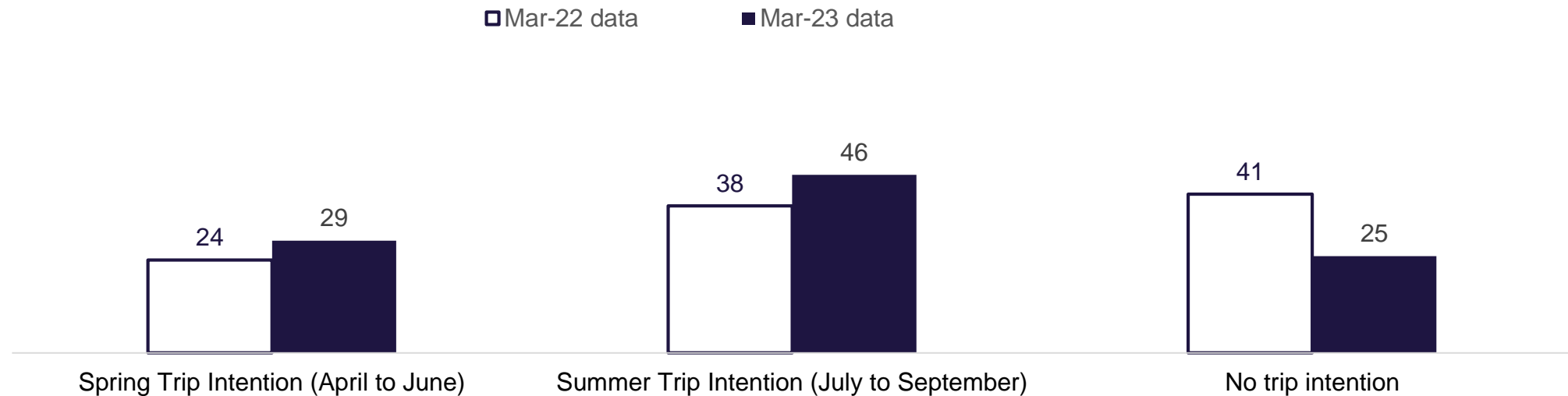
*Trip intention – respondents asked whether intending to take a UK trip in the next 3 months

**Actual trips taken – Respondents asked if they have taken a UK trip (looking back last 3 months) (NB. this data is only available from April 2021 up to December 2022 currently)

Boxes represent Jan-Mar fieldwork periods in each year of research

Nearly 3 in 10 plan on taking an overnight short break or holiday this Spring, nearly half this Summer – both higher than intention in the equivalent period in 2022.

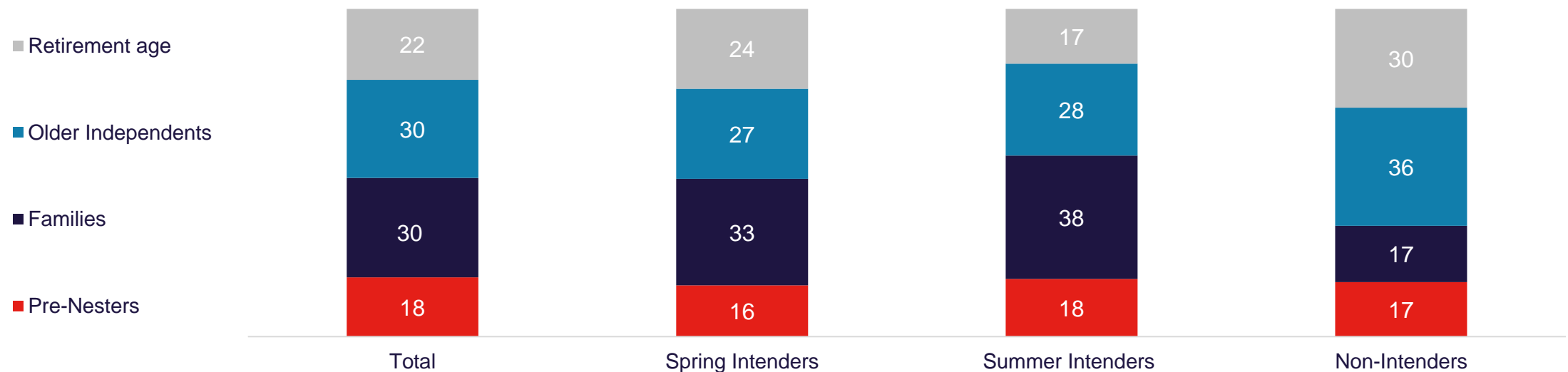
Figure 5. Proportion anticipating going on any overnight UK trips, Percentage, March data, UK



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. March 2023 = 1,755 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Families are the largest life stage for overnight trips in both Spring and Summer. Notably, retirees index above the population amongst Spring intenders and non-intenders.

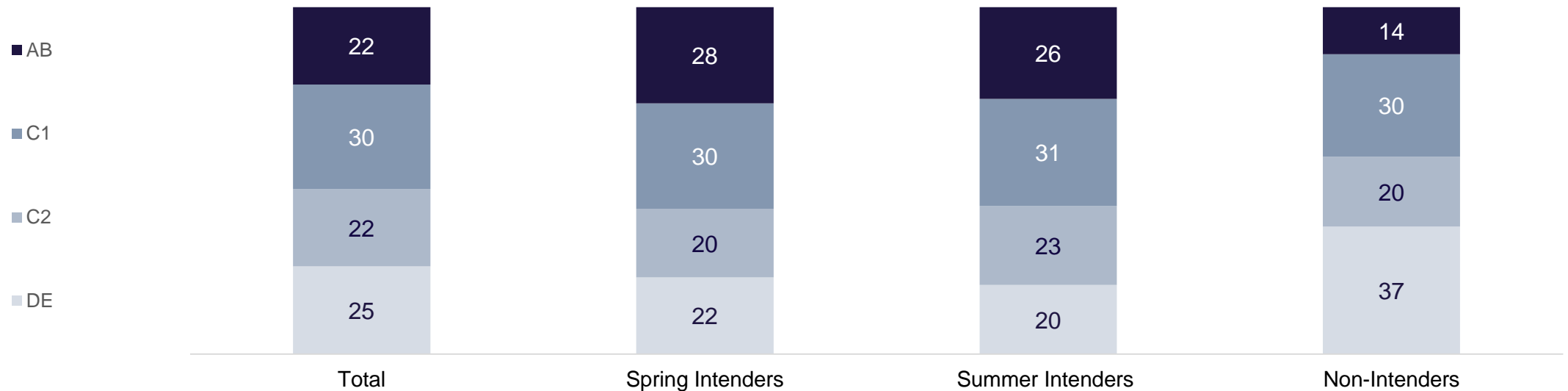
Figure 6. Life stage by UK overnight trip intention, Percentage, January to March data, UK



Source: Demographic questions. Life stage 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+.
 Base: Total n=5,270; Spring Intenders n=1,688; Summer Intenders n=2,402; Non-Intenders n=1,403

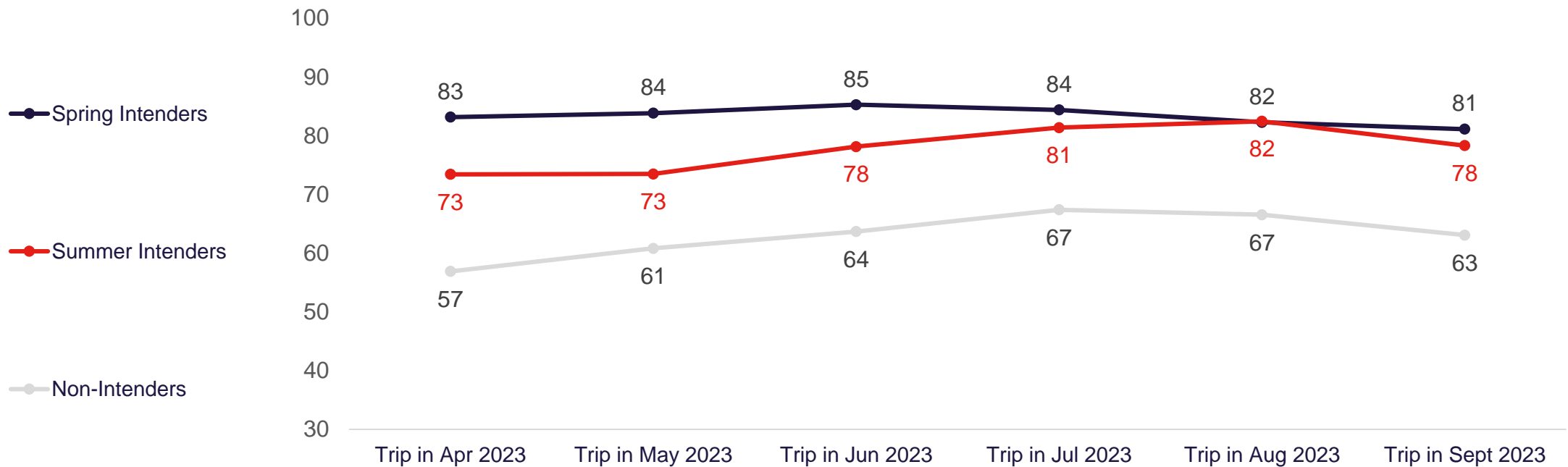
Both Spring and Summer intenders are more likely than average to belong to social grades AB. Non-Intenders are more likely to be social grades DE.

Figure 7. Social grade by UK overnight trip intention, Percentage, January to March data, UK



Those planning a trip in Spring are predominantly confident that their trip will go ahead, with Summer intenders more confident from July onwards.

Figure 8. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, January to March data, UK

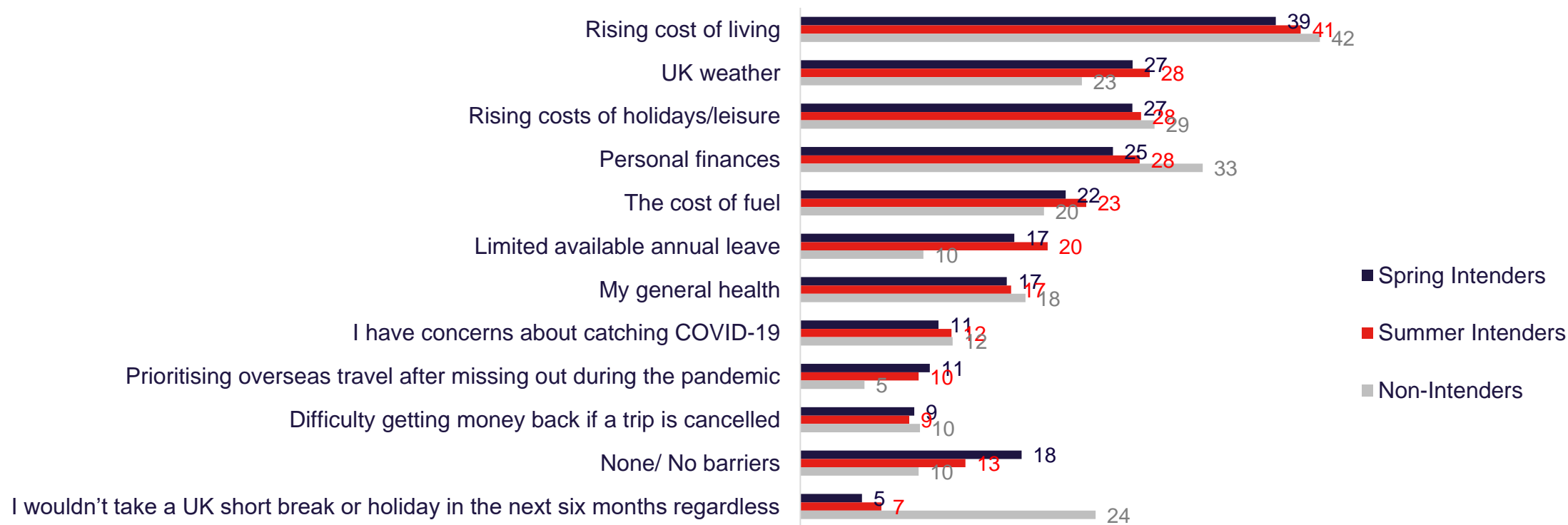


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?

Base: Spring Intenders n=1,688; Summer Intenders n=2,402; Non-Intenders n=1,403

Financial factors are seen as the main barriers to taking an overnight UK trip for intenders and non-intenders, although more so amongst non-intenders.

Figure 9. Top 10 Potential barriers for taking an overnight UK trip in next six months, Percentage Top 10, January to March data, UK



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: Spring Intenders n=1,688; Summer Intenders n=2,402; Non-Intenders n=1,403

The cost of living crisis is most likely to influence Intenders' behaviour through 'choosing cheaper accommodation', 'looking for more free things to do' and 'spending less on eating out'.

Figure 10. 'Cost of living' impact on UK holidays and short breaks, Percentage, January to March data, UK, Top 10



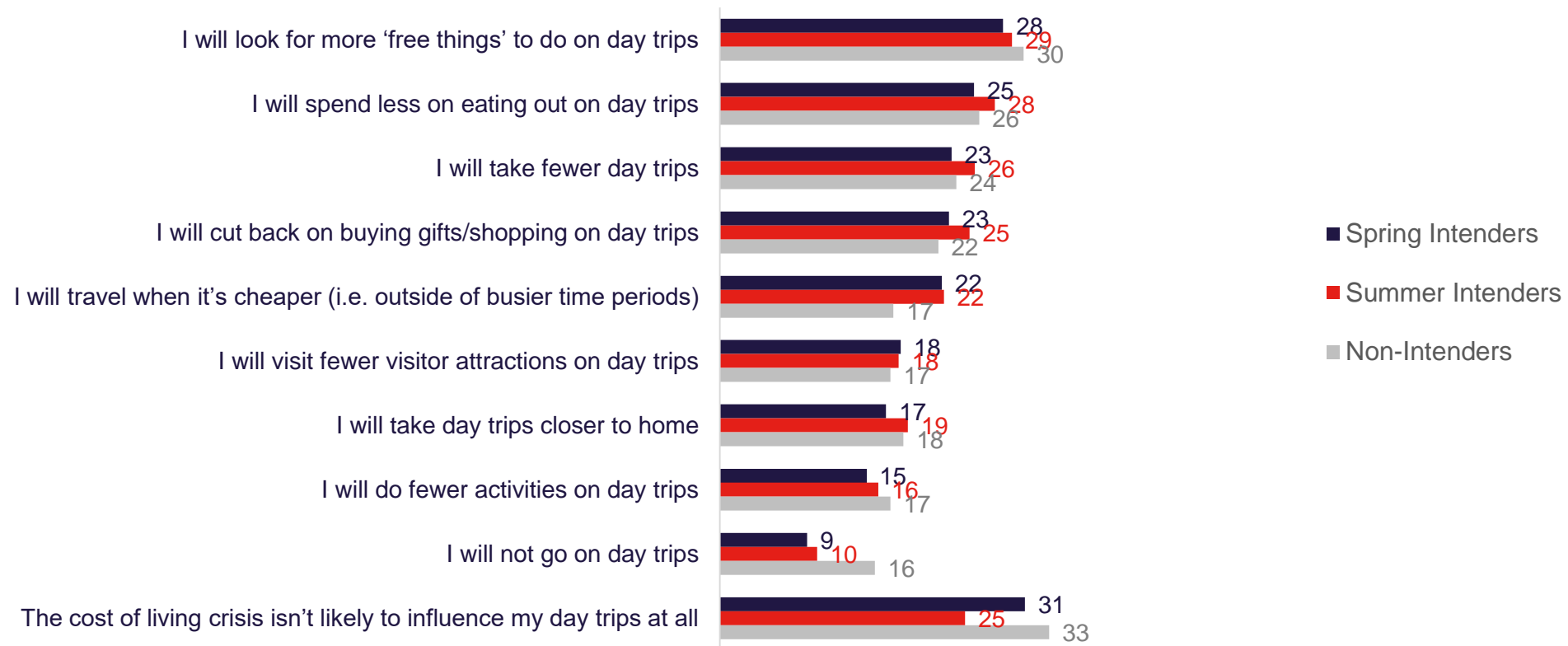
VB7c. How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next six months?

Base: Spring Intenders n=1,688; Summer Intenders n=2,402; Non-Intenders n=1,403

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

Focusing on day trips, the ‘cost of living crisis’ is most likely to encourage trip intenders to ‘look for more free things to do’, ‘spend less on eating out’ and ‘take fewer day trips’.

Figure 11. ‘Cost of living’ impact on day trips, Percentage, January to March data, UK, Full list



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: Spring Intenders n=1,688; Summer Intenders n=2,402; Non-Intenders n=1,403

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

Intenders from both 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 12. Motivations for UK holidays and short breaks, Percentage, January to March data, UK, Full list



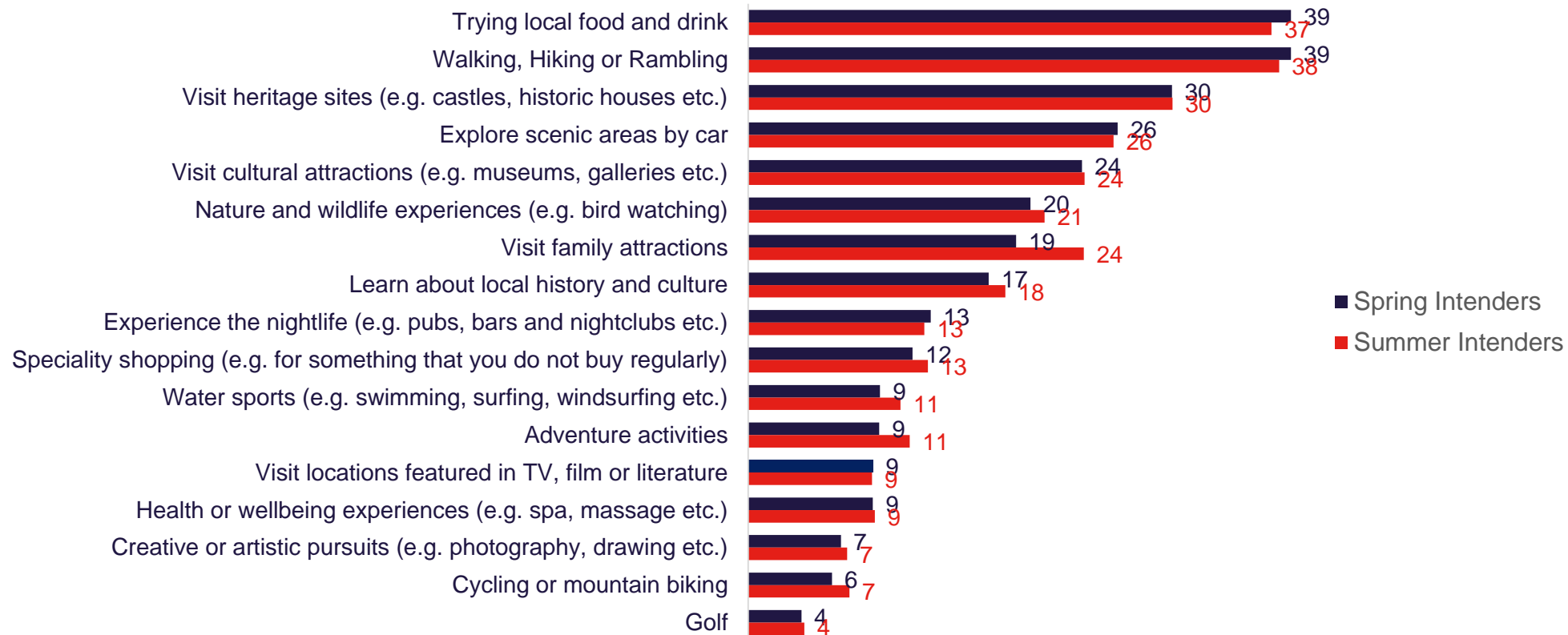
Question: VB6fii. Which of the following best describe your motivation/s for this trip?

Base: Spring Intenders n=1,688; Summer Intenders n=2,402

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

Spring and Summer intenders also share the same top 2 activities intended for their trips – ‘trying local food and drink’ and ‘walking, hiking or rambling’.

Figure 13. Activities for UK holidays and short breaks, Percentage, January to March data, 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: Spring Intenders n=1,688; Summer Intenders n=2,402

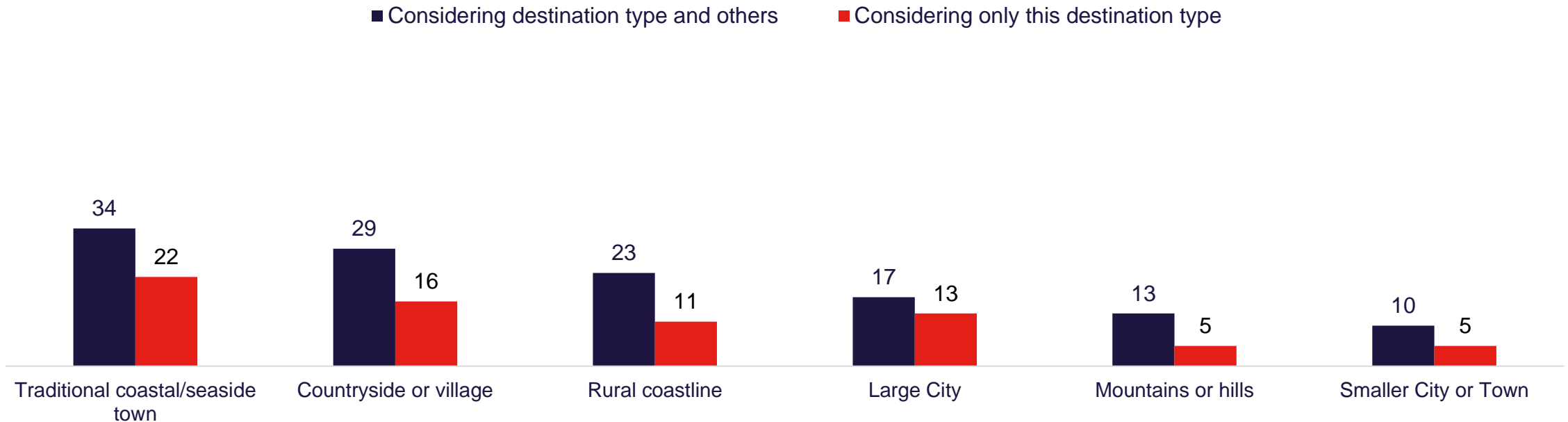
Note: Multiple choice question. Totals may exceed 100%.

3. Spring and Summer Intenders

Profile by Destination Type

Spring and Summer intenders are most likely to plan on taking their next overnight domestic trip in a traditional coastal/seaside town followed by countryside or village.

Figure 14. Main Destination Type of Intended Spring and Summer Trips, Percentage, January to March data, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
 Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=876 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

Some Spring/Summer intenders are considering more than one destination type. For example, 21% considering a traditional coastal/seaside town are also considering rural coastline.

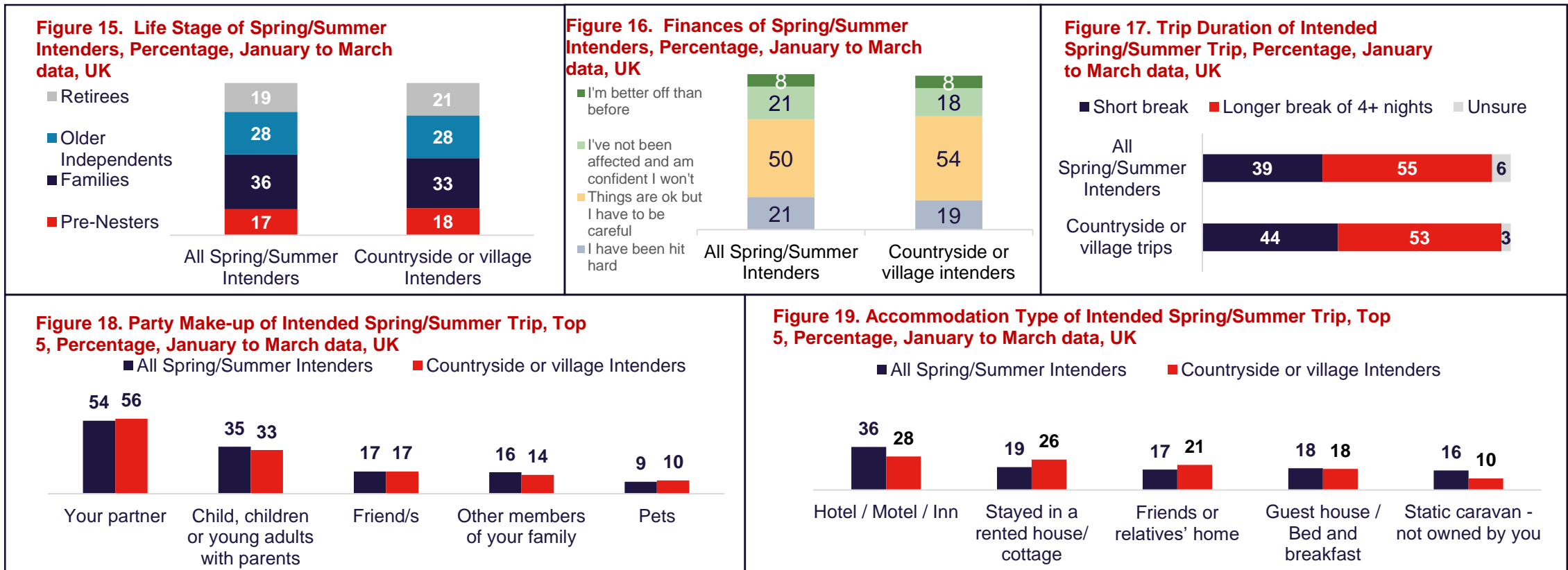
Table 1. Destination types also considered for Spring and Summer Trips, Percentage, January to March data, UK, (Read chart vertically)

Column %	Traditional coastal/ seaside town	Countryside or village	Rural coastline	Smaller city or town	Large city	Mountains or hills
Traditional coastal/ seaside town		25%	31%	25%	11%	26%
Countryside or village	21%		32%	25%	10%	43%
Rural coastline	21%	25%		17%	8%	31%
Smaller city or town	7%	9%	7%		9%	12%
Large city	6%	6%	6%	15%		10%
Mountains or hills	10%	20%	18%	17%	7%	

QVB5a. Which of the following best describes the main types of destinations you are likely to stay in during your UK trip?
 Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=876 Note: Multiple choice question.
 Totals may exceed 100% as some respondents anticipate to go on more than one trip and/or stay in more than one type of destination.

Spring/Summer Countryside or Village Intenders have a similar life stage profile and behaviour to average. They are more likely than average to stay in a rented house or cottage.

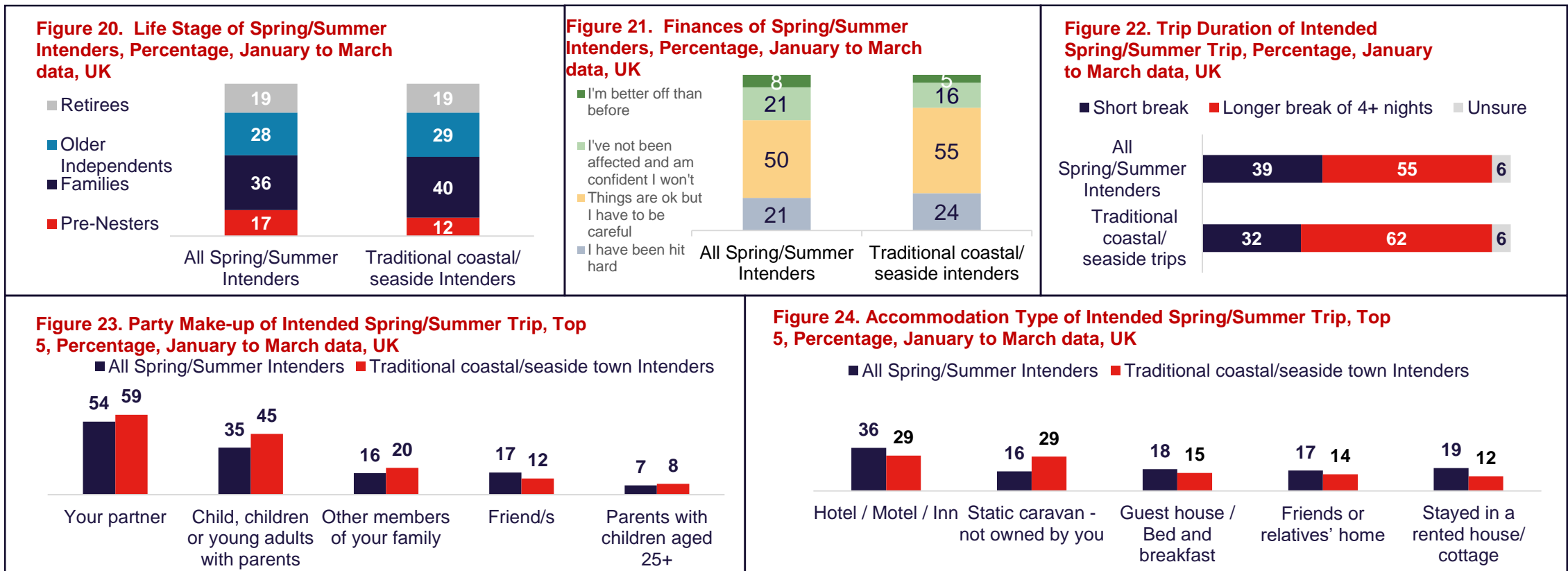
Comparison of those intending to travel to countryside or village in Spring or Summer to all Spring or Summer Intenders



Base: All respondents planning on taking a holiday or short break in the UK; Spring or Summer Intenders n=1,456; Base for life stage and comfort level chart: All Countryside or village Intenders n=827; Base for all other charts: Only Countryside or village Intenders n=445.

Spring/Summer Traditional Coastal/Seaside Town Intenders are more likely than average to be families, financially cautious, and to be staying for 4+ nights in a static caravan – not owned by me.

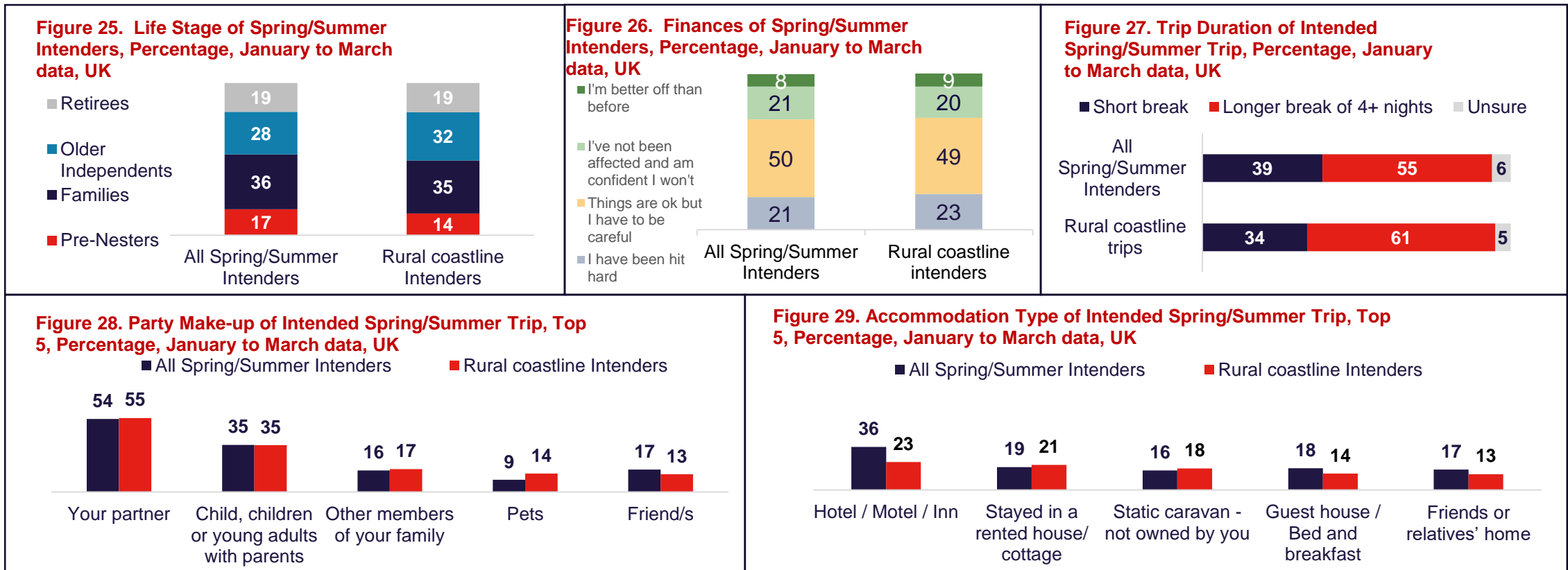
Comparison of those intending to travel to a traditional coastal/seaside town in Spring or Summer to all Spring or Summer Intenders



Base: All respondents planning on taking a holiday or short break in the UK; Spring or Summer Intenders n=1,456; Base for life stage and comfort level chart: All Traditional coastal/seaside town Intenders n=981; Base for all other charts: Only Traditional coastal/seaside town Intenders n=623.

Spring/Summer Rural Coastline Intenders tend to be slightly older than average, and are slightly more likely to take longer breaks.

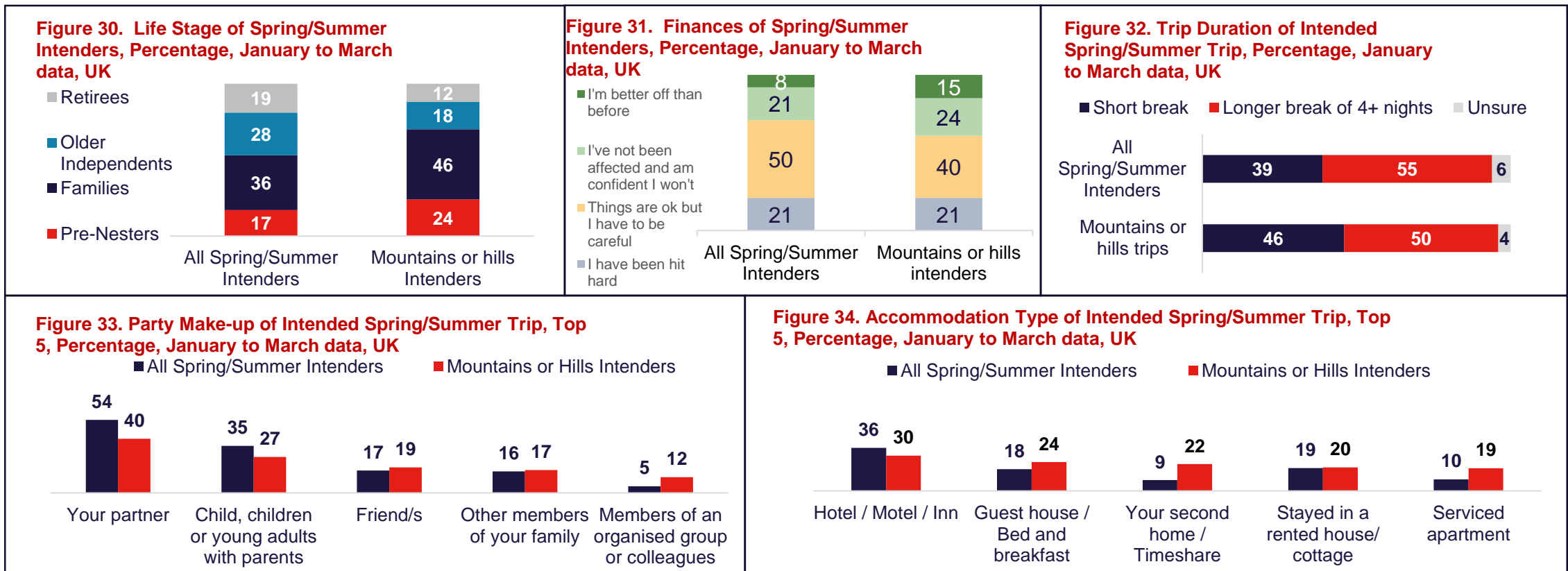
Comparison of those intending to travel to rural coastline in Spring or Summer to all Spring or Summer Intenders



Base: All respondents planning on taking a holiday or short break in the UK; Spring or Summer Intenders n=1,456; Base for life stage and comfort level chart: All Rural coastline Intenders n=623; Base for all other charts: Only Rural coastline Intenders n=306.

Spring/Summer Mountains or Hills Intenders are more likely to be families, financially secure, to be travelling with an organised group/colleagues and to be staying in a second home.

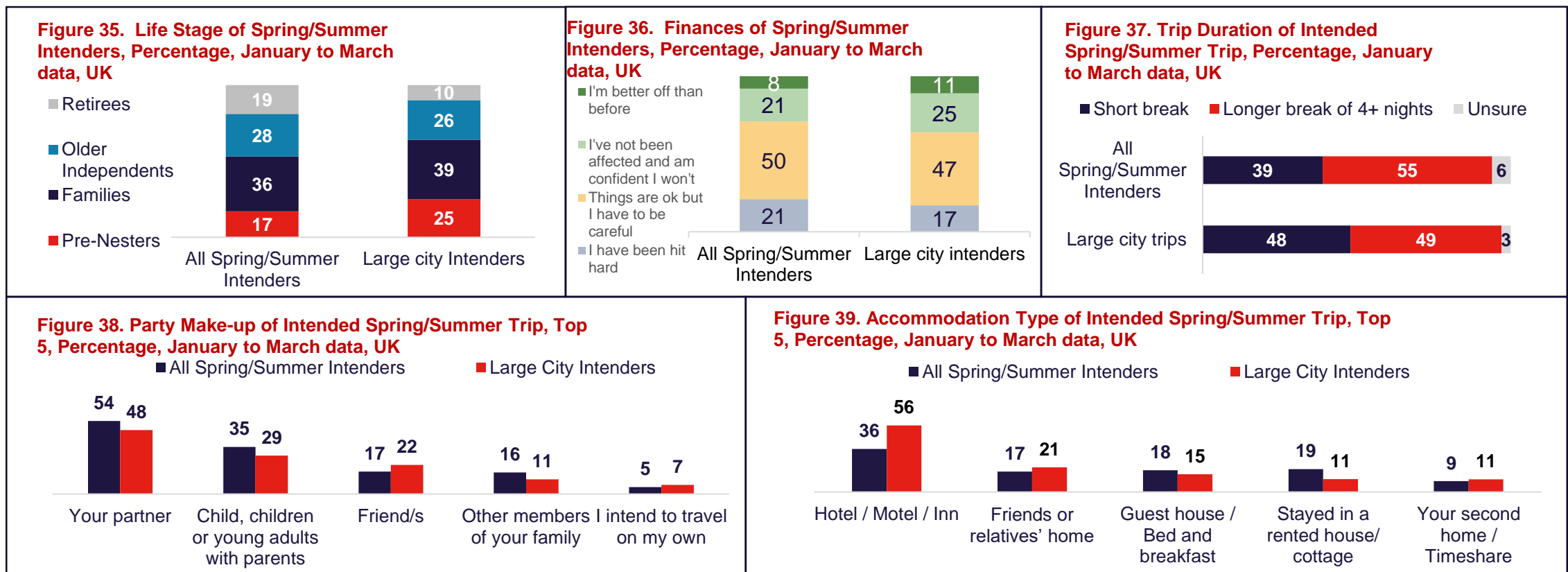
Comparison of those intending to travel to mountains or hills in Spring or Summer to all Spring or Summer Intenders



Base: All respondents planning on taking a holiday or short break in the UK; Spring or Summer Intenders n=1,456; Base for life stage and comfort level chart: All Mountains or hills Intenders n=403; Base for all other charts: Only Mountains or hills Intenders n=147.

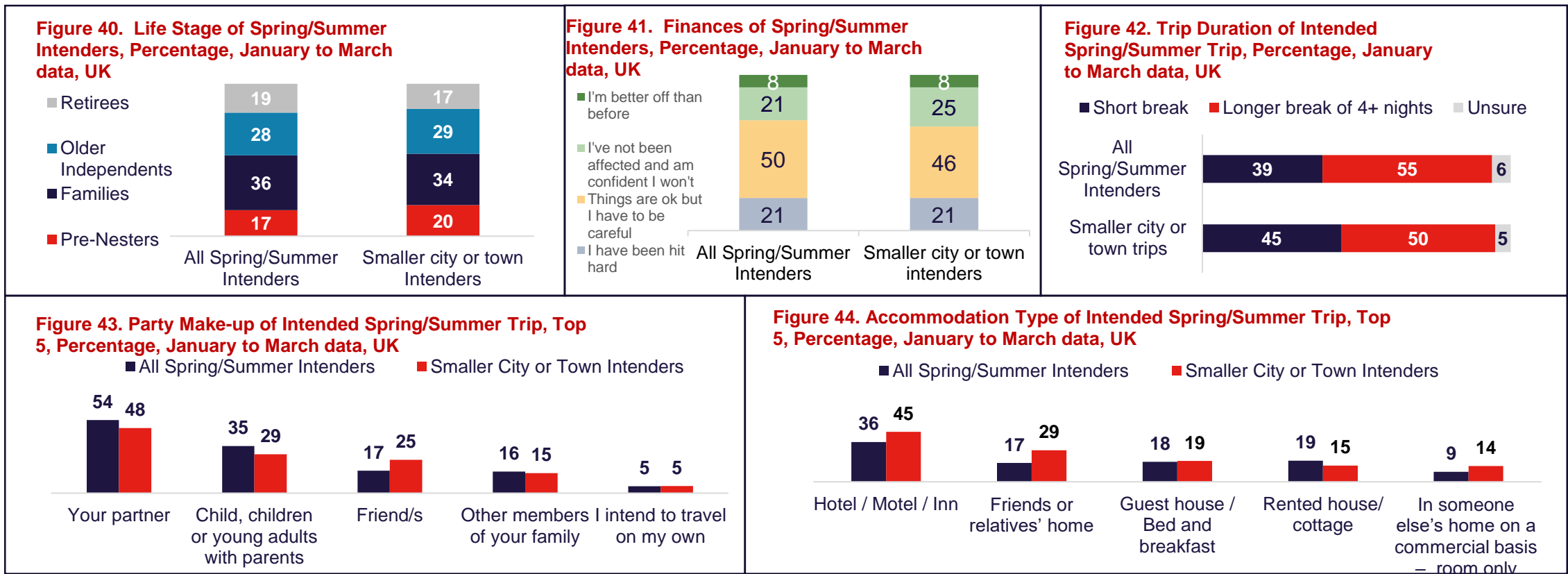
Spring/Summer Traditional Large City Intenders are more likely than average to be pre-nesters or families, financially secure, to be staying for 1-3 nights and to be staying in a hotel.

Comparison of those intending to travel to a large city in Spring or Summer to all Spring or Summer Intenders



Spring/Summer Smaller City or Town Intenders have a similar life stage profile to average but are more likely to stay on a short break, with friends and in a hotel/motel/inn.

Comparison of those intending to travel to a smaller city or town in Spring or Summer to all Spring or Summer Intenders



Base: All respondents planning on taking a holiday or short break in the UK; Spring or Summer Intenders n=1,456; Base for life stage and comfort level chart: All Smaller city or town Intenders n=516; Base for all other charts: Smaller city or town Intenders n=148.

4. Spring and Summer Intenders

Profile by Destination Region

The South West of England is the part of the UK most likely to generate a trip this Spring/Summer. Around 1 in 10 plan on going to a range of other destinations.

Figure 45. Next UK overnight trip destination region for Spring/Summer Intenders, Percentage, January to March data, UK



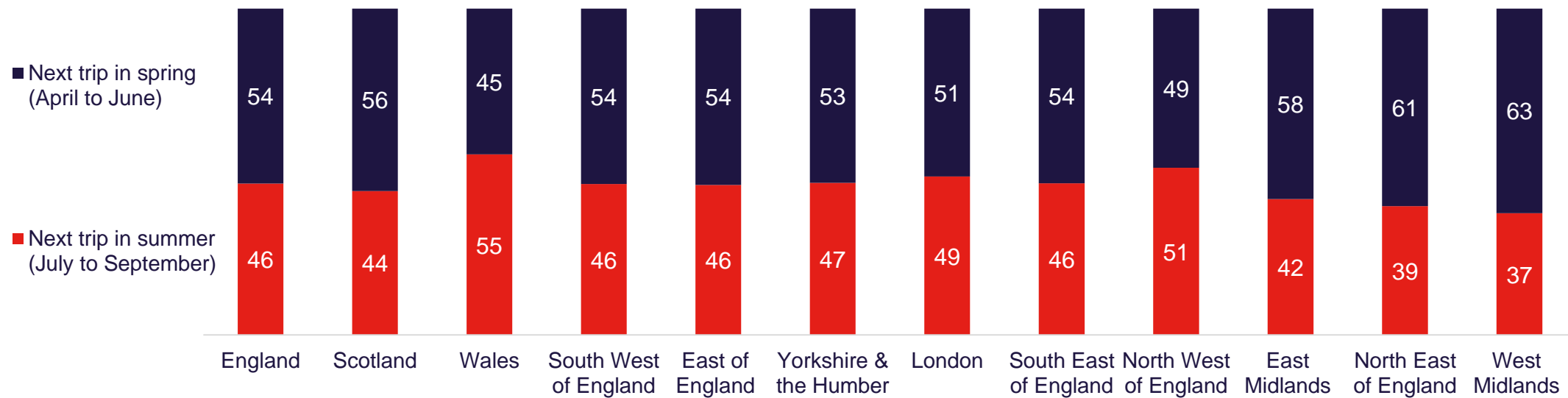
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=876

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Spring/Summer intenders are split relatively equally across the majority of destinations, with the exception of less-visited areas such as the Midlands and North East of England where Spring trips make up the majority.

Figure 46. Next intended overnight trip by destination region, Percentage, January to March data, UK

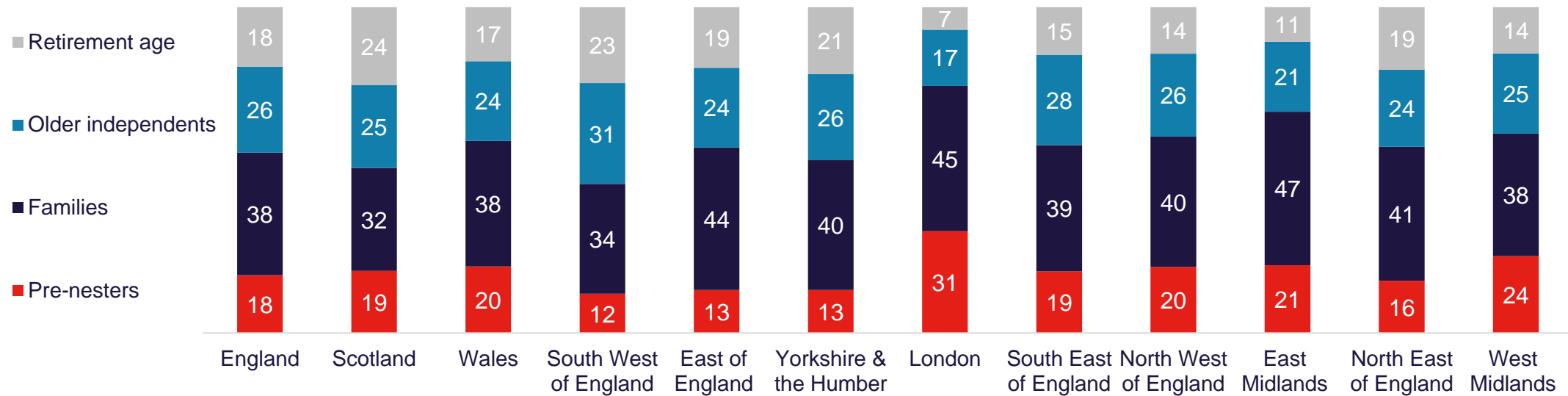


Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Spring or Summer England n=2,038; Scotland n=378; Wales n=324; South West of England n=560; London n=315; South East of England n=264; North West n=302; North East n=149 West Midlands = 136, East Midlands = 176, East of England n=289, Yorkshire =313

In Spring/Summer, families are the largest life stage for overnight trips to all UK destinations – although not all will travel with their children (see next page).

Figure 47. Life Stage of Spring/Summer Intenders by destination region, Percentage, January to March data, UK



Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Spring or Summer England n=2,038; Scotland n=378; Wales n=324; South West of England n=560; London n=315; South East of England n=264; North West n=302; North East n=149 West Midlands = 136, East Midlands = 176, East of England n=289, Yorkshire =313

Wales, East of England and North East of England are the areas of the UK most likely to attract parties with children. In the context of the previous page, this suggests that not all families will take their children on their trips.

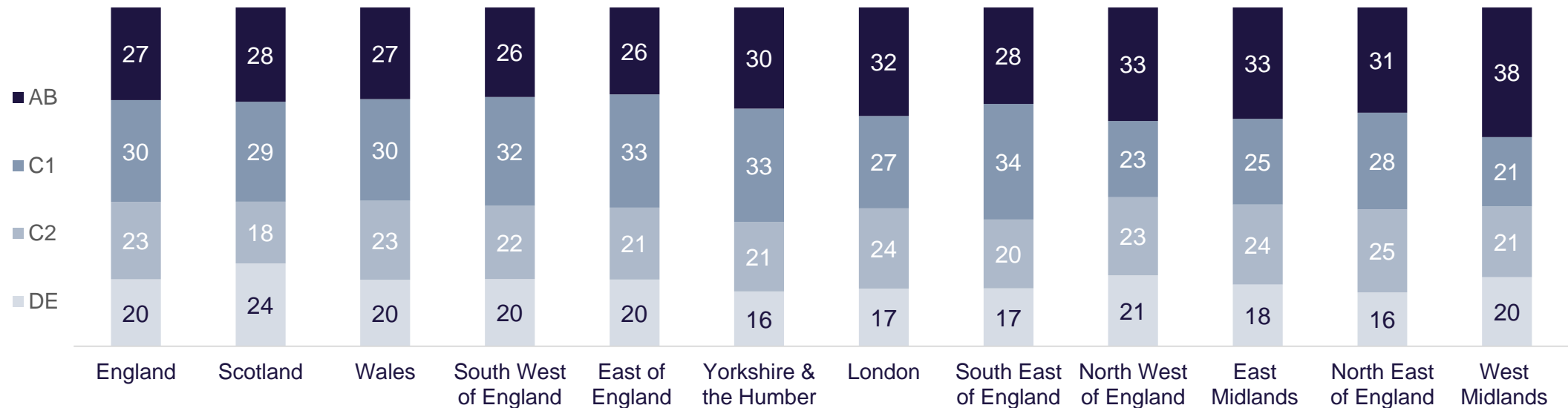
Table 2. Trip taker party composition of Spring/Summer Trip by destination region, Percentage, January to March data, UK

Trip taker party composition	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Partner	54%	53%	53%	62%	64%	65%	41%	53%	50%	40%	49%	52%
Children or young adults (aged 16-24)	36%	28%	45%	35%	41%	37%	31%	34%	38%	37%	40%	26%
Friend/s	17%	16%	16%	16%	14%	12%	23%	18%	17%	22%	19%	16%
Other members of my family	17%	19%	16%	17%	15%	10%	11%	22%	23%	13%	13%	20%
Pets	9%	9%	12%	10%	12%	14%	6%	8%	7%	9%	6%	5%
With parents of older adults	8%	5%	11%	9%	7%	6%	4%	7%	9%	3%	10%	1%
Will travel alone	4%	7%	5%	7%	1%	4%	4%	2%	4%	3%	10%	8%
Other	6%	2%	1%	3%	2%	6%	8%	7%	3%	7%	5%	6%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

West Midlands is the most likely to attract AB social grades, followed by the East Midlands and London.

Figure 48. Social grade of Spring/Summer Intenders by destination region, Percentage, January to March data, UK



Social grade question and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Spring or Summer England n=2,038; Scotland n=378; Wales n=324; South West of England n=560; London n=315; South East of England n=264; North West n=302; North East n=149 West Midlands = 136, East Midlands = 176, East of England n=289, Yorkshire =313

Destination intention correlates strongly with proximity of residence. For example, 29% of those planning an overnight trip to North West of England live in the North West.

Table 3. Region of residence of Spring/Summer Intenders by destination region, Percentage, January to March data, UK, (Read chart vertically)

Region of residence [down]	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
England	90%	59%	79%	91%	95%	92%	82%	94%	84%	89%	90%	89%
Scotland	5%	33%	2%	2%	3%	5%	9%	2%	9%	5%	7%	6%
Wales	4%	4%	16%	6%	2%	3%	6%	2%	3%	3%	1%	4%
South West of England	8%	5%	7%	16%	7%	3%	5%	6%	3%	6%	4%	8%
East of England	10%	6%	2%	5%	26%	11%	7%	9%	6%	7%	2%	8%
Yorkshire & the Humber	9%	5%	6%	4%	7%	21%	8%	3%	11%	6%	19%	9%
London	15%	14%	6%	13%	12%	12%	26%	24%	13%	16%	17%	19%
South East of England	14%	7%	10%	19%	14%	7%	7%	31%	7%	8%	5%	7%
North West of England	11%	10%	24%	9%	6%	13%	11%	3%	29%	11%	16%	8%
East Midlands	9%	5%	4%	8%	13%	10%	3%	5%	3%	20%	3%	6%
North East of England	4%	3%	2%	2%	3%	7%	7%	2%	6%	3%	16%	3%
West Midlands	10%	4%	18%	14%	6%	6%	7%	10%	5%	12%	8%	21%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All respondents planning on taking a holiday or short break in the UK in Spring or Summer England n=2,038; Scotland n=378; Wales n=324; South West of England n=560; London n=315; South East of England n=264; North West n=302; North East n =149 West Midlands = 136, East Midlands = 176, East of England n=289, Yorkshire =313

Destination type reflects the destination region being considered. London Intenders are likely to visit a large city while South West of England Intenders are likely to visit a traditional coastal/seaside town.

Table 4. Destination type of Spring/Summer Trip by destination region, Percentage, January to March data, UK

Destination type	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Traditional coastal/seaside town	35%	19%	40%	51%	42%	31%	13%	47%	24%	15%	19%	19%
Countryside or village	28%	33%	28%	28%	27%	31%	14%	21%	34%	41%	27%	24%
A city or large town	27%	32%	11%	12%	12%	19%	64%	23%	36%	28%	34%	37%
Rural coastline	21%	22%	33%	28%	27%	20%	10%	20%	15%	9%	19%	12%
Mountains or hills	11%	24%	16%	6%	7%	13%	9%	8%	17%	17%	7%	5%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

Hotel/motel/inn is the top accommodation type for Spring/Summer Intenders across most regions, although there is some variation.

Table 5. Accommodation type of Spring/Summer Trip by destination region, Percentage, January to March data, UK, Top 9 ranked by England Spring/Summer Intenders

Accommodation type	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Hotel / Motel / Inn	33%	43%	32%	28%	23%	27%	50%	30%	37%	28%	28%	37%
In a rented house/ cottage/ lodge or similar	20%	18%	19%	18%	19%	22%	16%	13%	16%	20%	31%	15%
Friends or relatives' home	18%	14%	17%	13%	12%	12%	26%	26%	18%	21%	12%	23%
Guest house / Bed and breakfast	17%	21%	13%	15%	8%	15%	14%	17%	21%	13%	18%	20%
Static caravan - not owned by you	16%	12%	22%	17%	28%	19%	4%	18%	11%	9%	8%	12%
Your second home / Timeshare	11%	5%	2%	3%	8%	10%	13%	14%	13%	13%	14%	15%
Serviced apartment	11%	6%	5%	6%	7%	8%	13%	12%	10%	9%	13%	12%
In someone else's home on a commercial basis – rental of room only (e.g. AirBnB)	9%	4%	8%	4%	7%	6%	12%	11%	12%	12%	3%	17%
Campervan / Motorhome	9%	7%	8%	5%	10%	5%	11%	7%	7%	7%	6%	12%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

Less common accommodation choices among Spring/Summer Intenders include staying in a farmhouse, glamping and staying in a touring caravan.

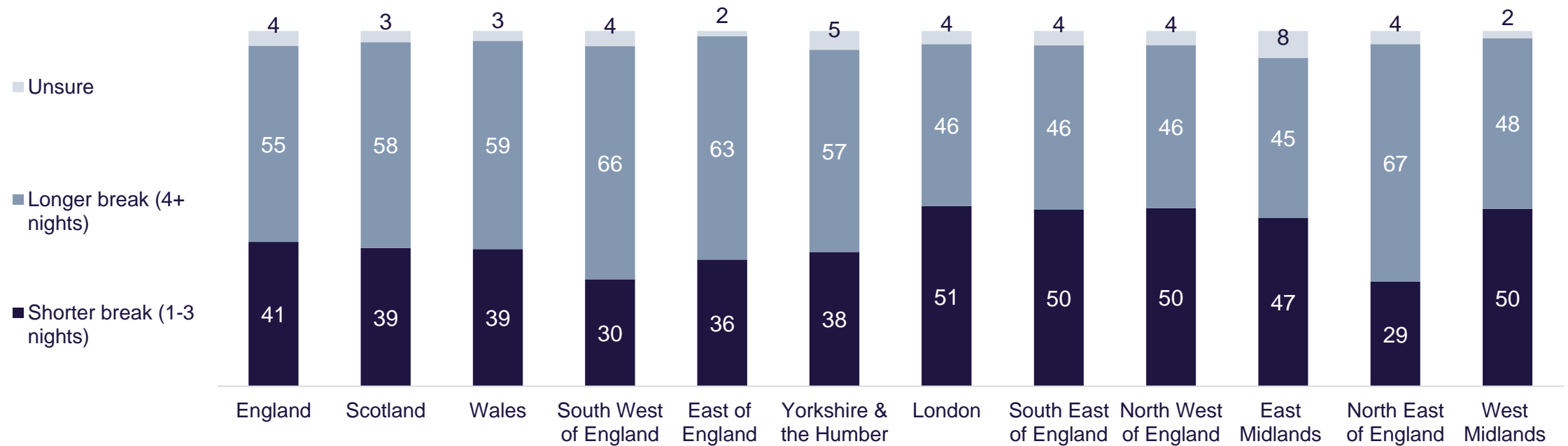
Table 6. Accommodation type of Spring/Summer Trip by destination region, Percentage, January to March data, UK, Bottom 8 ranked by England Spring/Summer Intenders

Accommodation type	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Hostel	8%	5%	3%	2%	6%	9%	12%	7%	8%	11%	9%	6%
Staying in a rented flat/apartment or similar	8%	8%	8%	8%	5%	6%	9%	8%	6%	6%	8%	5%
Static caravan - owned by you	7%	2%	5%	4%	6%	6%	13%	4%	5%	10%	10%	5%
In someone else's home on a commercial basis – full property	6%	9%	7%	7%	8%	4%	5%	2%	9%	4%	3%	7%
Tent	6%	2%	5%	8%	4%	5%	4%	3%	5%	7%	3%	7%
Touring caravan	5%	3%	2%	3%	2%	3%	4%	4%	5%	4%	10%	8%
Glamping / Alternative accommodation	3%	4%	4%	2%	1%	3%	4%	5%	2%	8%	2%	0%
Farmhouse	3%	5%	4%	4%	1%	2%	2%	1%	4%	4%	0%	2%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

Trip length differs by destination. The majority of South West of England intenders are planning a longer break, whilst London intenders are more likely to be planning a short break.

Figure 49. Duration of Spring/Summer Trip by destination region, Percentage, January to March data, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n=70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

‘Family time or time with my partner’ is the leading motivation for a short break or holiday for the majority of destinations.

Table 7. Motivations to take a trip for Spring/Summer Trip by destination region, Percentage, January to March data, UK, Top 7 ranked by England Spring/Summer Intenders

Motivations	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Family time or time with my partner	41%	41%	46%	47%	49%	48%	30%	38%	47%	27%	32%	32%
To get away from it all and have a rest	39%	41%	48%	49%	44%	42%	21%	40%	35%	24%	41%	26%
To connect with nature / be outdoors	23%	26%	29%	30%	22%	24%	7%	14%	27%	18%	21%	15%
To spend time with friends	19%	17%	18%	18%	20%	11%	21%	21%	22%	12%	16%	18%
To travel somewhere new	17%	21%	20%	17%	16%	9%	11%	14%	22%	18%	15%	21%
To celebrate a special occasion, such as birthday or anniversary	14%	14%	12%	13%	13%	13%	14%	14%	15%	7%	6%	13%
To go somewhere where there was great food	12%	9%	6%	14%	11%	11%	12%	7%	7%	8%	8%	6%

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

Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

Less common motivations include 'to go somewhere luxurious', 'to learn something new' and 'for a technology detox'.

Table 8. Motivations to take a trip for Spring/Summer Trip by destination region, Percentage, January to March data, UK, Bottom 6 ranked by England Spring/Summer Intenders

Motivations	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
For an active holiday, with exercise or sport	10%	12%	14%	10%	10%	10%	8%	9%	10%	16%	4%	7%
For adventure or a challenge	9%	9%	13%	7%	9%	9%	10%	8%	11%	11%	3%	12%
Because of a particular interest (e.g. sport, music, festival, etc.)	9%	11%	4%	6%	4%	7%	11%	8%	10%	10%	16%	10%
To learn something new	7%	11%	7%	7%	5%	4%	8%	7%	8%	9%	5%	8%
To go somewhere luxurious where I could feel pampered	7%	5%	7%	2%	4%	6%	9%	6%	7%	9%	7%	1%
For a technology detox	6%	4%	5%	6%	1%	3%	14%	4%	5%	6%	2%	15%

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

Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

‘Walking, hiking or rambling’ and ‘trying local food and drink’ are the leading activities for most destinations, with the exception of London where ‘visiting cultural attractions’ leads the way.

Table 9. Activities likely to participate in for Spring/Summer Trip by destination region, Percentage, January to March data, UK, Top 10 ranked by England Spring/Summer Intenders

Activities	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Walking, Hiking or Rambling	34%	43%	48%	48%	37%	34%	12%	37%	32%	28%	37%	23%
Trying local food and drink	33%	41%	41%	46%	29%	32%	24%	36%	34%	27%	27%	27%
Visit heritage sites	27%	40%	27%	36%	23%	26%	18%	28%	19%	26%	29%	26%
Explore scenic areas by car	23%	31%	31%	31%	25%	26%	9%	21%	18%	21%	30%	24%
Visit family attractions	23%	19%	25%	24%	32%	23%	17%	26%	27%	15%	18%	18%
Visit cultural attractions	22%	28%	23%	18%	23%	21%	31%	18%	22%	23%	20%	22%
Nature and wildlife experiences	19%	20%	26%	18%	18%	19%	10%	20%	22%	20%	25%	13%
Learn about local history and culture	16%	22%	19%	17%	13%	18%	13%	13%	13%	12%	13%	8%
Experience the nightlife	14%	15%	8%	10%	10%	13%	19%	18%	15%	10%	8%	15%
Speciality shopping	12%	13%	9%	12%	7%	12%	15%	13%	16%	12%	9%	6%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?

Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185

A range of more niche activities are also intended across destinations.

Table 10. Activities likely to participate in for Spring/Summer Trip by destination region, Percentage, January to March data, UK

Activities	England	Scotland	Wales	South West of England	East of England	Yorkshire & the Humber	London	South East of England	North West of England	East Midlands	North East of England	West Midlands
Adventure activities	11%	11%	14%	9%	12%	11%	9%	13%	16%	7%	13%	9%
Water sports	11%	7%	17%	13%	9%	7%	5%	10%	14%	9%	4%	10%
Visit locations featured in TV, film or literature	9%	11%	4%	9%	2%	5%	11%	4%	13%	8%	8%	2%
Health or wellbeing experiences	8%	10%	7%	9%	6%	7%	8%	9%	10%	5%	5%	5%
Creative or artistic pursuits	7%	7%	4%	7%	5%	7%	10%	7%	5%	7%	9%	5%
Cycling or mountain biking	6%	7%	9%	5%	4%	5%	5%	5%	10%	10%	5%	10%
Conservation or volunteering activities	4%	2%	7%	3%	4%	2%	5%	6%	5%	2%	1%	7%
Golf	4%	4%	7%	5%	2%	0%	6%	7%	2%	7%	1%	2%

VB6fiii. VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in?

Base: All respondents planning on taking a holiday or short break in the UK in Spring/Summer England n=1,866; Scotland n=271; Wales n=218; South West of England n=418; London n=222; South East of England n=173; North West n=202; North East n =70; West Midlands =68, East Midlands =90, East of England n=191, Yorkshire =185



Methodology Notes

Methodology outline

- The findings in this report are based on an online survey conducted amongst 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' in Wales and 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.

Master Data Table

- 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.