



Great Britain Tourism Survey:  
Quarter 1 2023 (January – March)

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# Domestic GB Tourism Statistics (Overnight Trips) Quarter 1 2023 (January – March)

## Introduction

The statistics in this release are based on a new combined online survey that replaces the separate Great Britain Tourism Survey and Great Britain Day trips Survey that ran until the end of 2019.

These statistics are used to monitor domestic tourism demand and measure the contribution and impact of domestic tourism on the visitor economy. A key purpose of these statistics is to uncover insights into market trends over time. Changes in survey methodology introduced in 2021, together with the interruption in data collection due to COVID-19, mean that results published in this release are not directly comparable with data published for 2019 and previous years. Please see the 2022 Methodology and Quality Report and accompanying Background Quality Report for further details.

This report details the main estimates for the volume and value of domestic overnight trips taken by British residents in Scotland and Great Britain in Quarter 1 2023. The statistics published in this release cover the period from the beginning of January to the end of March 2023.

Detailed results for England and Wales are being published by [VisitEngland](#) and [Visit Wales](#).

These statistics are labelled as ‘experimental’ to enable testing and further modification to meet user needs. Further information on this is available on the [Office for National Statistics website](#).

## Key Points

### Overnight Tourism Performance in Quarter 1 2023

#### Summary of Scotland's Overnight Tourism Performance in Quarter 1 2023 (January – March)

- Great Britain residents took 2.7 million overnight trips in Scotland with £641 million spent during these trips.
- The volume of overnight trips, nights and expenditure in Scotland during the first quarter of 2023 were lower compared to the same period in 2022.
- Visits to see friends and family were the most popular types of overnight trip to Scotland during the first quarter of 2023, followed by holidays and other types of trip.
- Cities and large towns were the preferred locations for most overnight visitors to Scotland, followed by small towns and countryside/villages.
- The average spend on an overnight trip in Scotland was £234 compared to £266 average for an overnight trip in Great Britain.
- The average spend per night in Scotland was marginally higher at £93 compared to the GB average of £92.



## Trips and Spend in GB Nations

### Quarter 1 2023 (January – March)

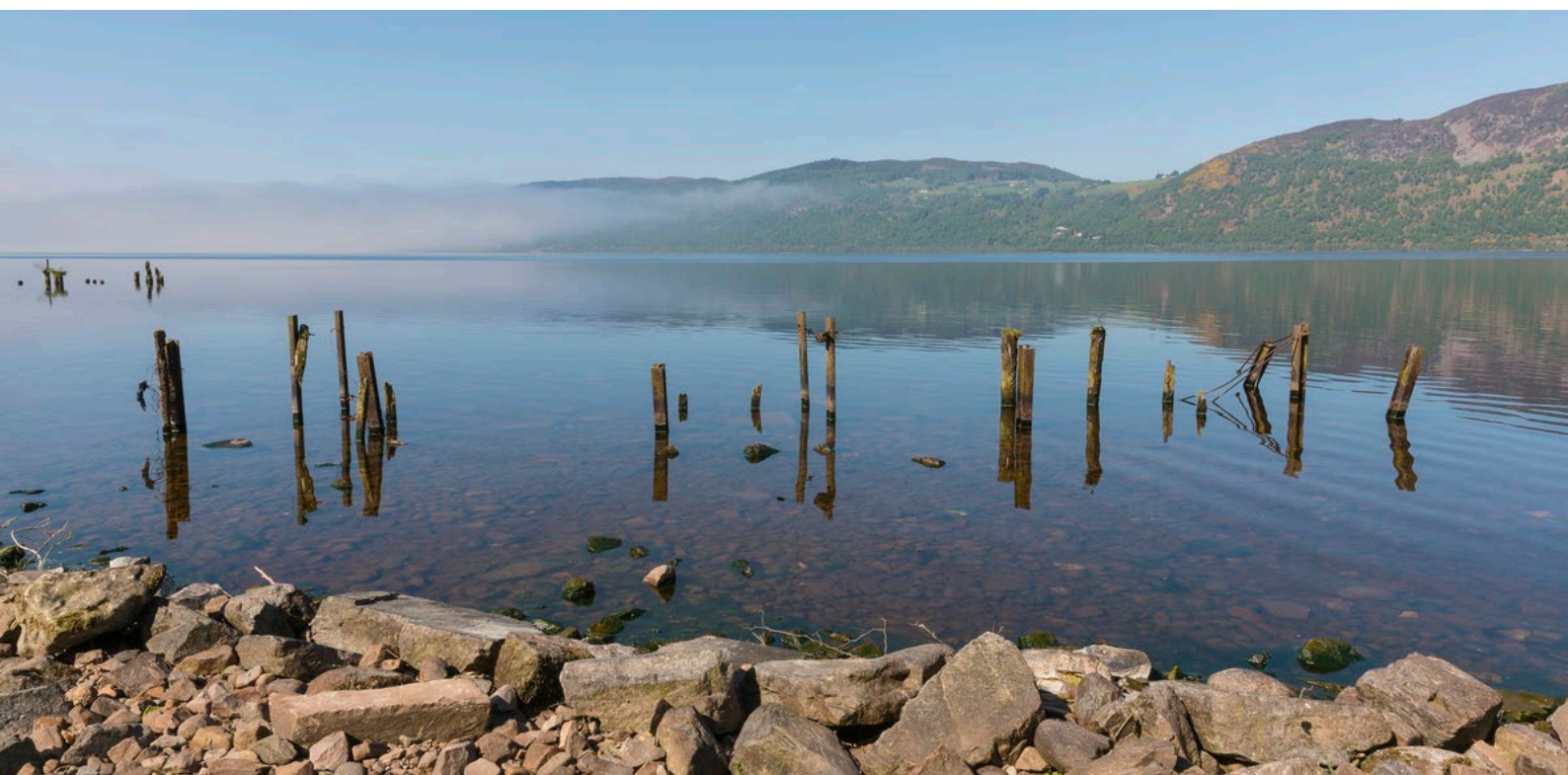
Between January and March 2023, Great Britain residents took 23.8 million overnight trips in Great Britain with 68.3 million nights and £6.3 billion spend overall. During the same period, there were 2.7 million overnight trips to Scotland with 6.9 million nights and a total expenditure of £641 million. Approximately 12% of all overnight trips by British residents were to Scotland, compared to 85% to England and 7% to Wales. The share of nights and spend in Scotland was 10%.

#### Total volume overnight trips and spend to each nation of Great Britain, Q1 2023

	GB	England	Scotland	Wales
<b>Trips (millions)</b>	23.8	20.3	2.7	1.7
<b>% GB trips</b>	100%	85%	12%	7%
<b>Nights (millions)</b>	68.3	56.4	6.9	5.1
<b>% GB Nights</b>	100%	83%	10%	7%
<b>Spend (£ million)</b>	£6,316	£5,335	£641	£341
<b>% GB Spend</b>	100%	84%	10%	5%

Source: Great Britain Tourism Survey Q1 2023 (January – March)

Please note that the percentage of trips to each nation does not total 100% as respondents may have visited more than one nation within a trip.



## Domestic Overnight Tourism Performance in Scotland, Quarter 1 2023 (January – March)

A total of 2.7 million overnight trips were made to Scotland by residents of Great Britain in the first quarter of 2023, staying for 6.9 million nights and spending £641 million. These estimates are based on a sample of 298 trips.

### Domestic overnight tourism performance to Scotland, Q1 2023 and Q1 2022

	Trips (millions)	Nights (millions)	Spend (£ million)
<b>Q1 2023</b>	2.7	6.9	£641
<b>Q1 2022</b>	3.1	9.4	£665
<b>% change</b>	-10%	-26%	-4%

Source: Great Britain Tourism Survey Q1 2023 (January - March)

Overall, the number of overnight trips, nights and associated spend were slightly lower in Q1 2023 compared to the same period in 2022. This is most likely because of the final COVID-19 related travel restrictions being lifted in March 2022, leading to a surge in visits, particularly to see friends and family, at the time.

Year	Spend/trip	Nights/trip	Spend/night
<b>Q1 2023</b>	£234	2.5	£93
<b>Q1 2022</b>	£215	3.0	£71
<b>% change</b>	9%	-17%	31%

Source: Great Britain Tourism Survey Q1 2023 (January - March)

The average domestic overnight visitor in Scotland in Q1 2023 spent a total of £234 over a 2.5 night trip with a daily expenditure of £93. Although trips were shorter by half a day on average, domestic overnight visitors to Scotland spent on average 31% more per night, and 9% more per trip compared to the same period in 2022.

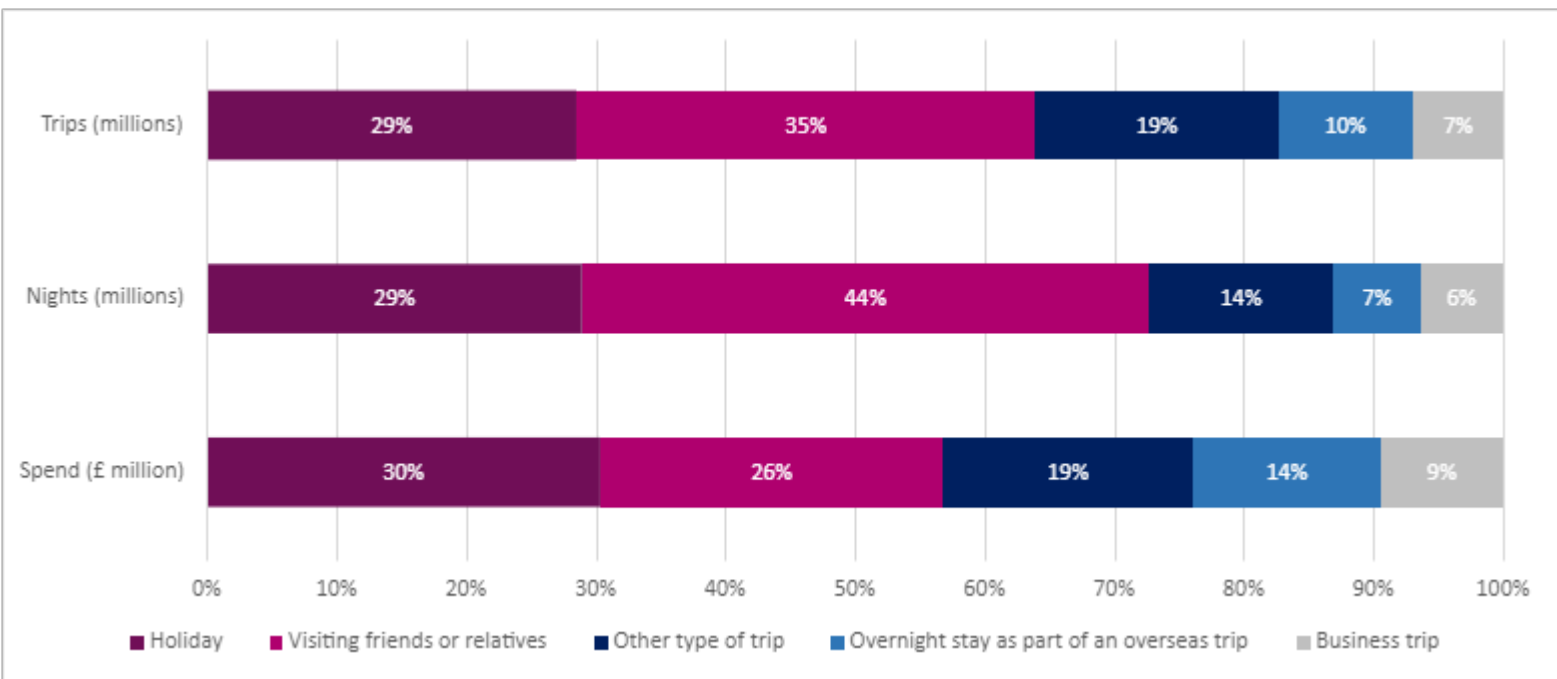
## Purpose of Domestic Overnight Trips in Scotland, Quarter 1 2023 (January – March)

Trips to see friends and relatives made up the largest proportion of overnight trips taken in Scotland in Q1 2023, accounting for just over a third of total trips. Friends and family trips also accounted for around one quarter of the total expenditure and 44% of the total nights.

Holiday trips made up the second largest proportion of overnight trips, making 29% of total trips, 29% of total nights and 30% of total expenditure.

Other types of trips\* made up 19% of total trips, 14% of total nights and 19% of the total expenditure. This was driven by an increase in trips for personal events or celebrations such as birthdays, weddings and anniversaries. Business trips and overnight stays as part of an overseas trip both made up smaller proportions of the total trips.

### Domestic overnight trips, nights and spend in Scotland by purpose of trip, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

\*Other types of trip include personal events, public events, and travel for the purposes of study, medical, religious reasons

## Domestic overnight trips, nights and spend in Scotland by purpose of trip, Q1 2023

Purpose of Trip	Trips (millions)	Nights (millions)	Spend (£ million)
Visiting friends or relatives	1.0	3.0	169
Holiday	0.8	2.0	195
Overnight stay as part of an overseas trip*	0.3	0.5	93
Business trip*	0.2	0.4	60
<b>Total</b>	<b>2.7</b>	<b>6.9</b>	<b>641</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

Other types of trip include personal events, public events, or travel for study, medical or religious reasons.

\*Data based on a sample size lower than 30

Those visiting friends and family stayed in Scotland for the longest on average (3.1 nights) however spent less per night and per trip than those on a holiday trip. Visitors who stayed overnight in Scotland as part of an overseas trip had the highest average spend at £325 per trip. This is despite only staying for 1.6 nights on average, the shortest duration out of all visitor groups.

In terms of average spend per night, those staying overnight in Scotland as part of an overseas trip spent the most per night (£201), while those visiting friends and family spent the least per night (£56).

Purpose of Trip	Average length of trips (nights)	Average spend per night (£)	Average spend per trip (£)
Visiting friends or relatives	3.1	56	174
Holiday	2.6	97	249
Overnight stay as part of an overseas trip*	1.6	201	325
Business trip*	2.3	137	318
<b>Total</b>	<b>2.5</b>	<b>93</b>	<b>234</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

Other types of trip include personal events, public events, or travel for study, medical or religious reasons.

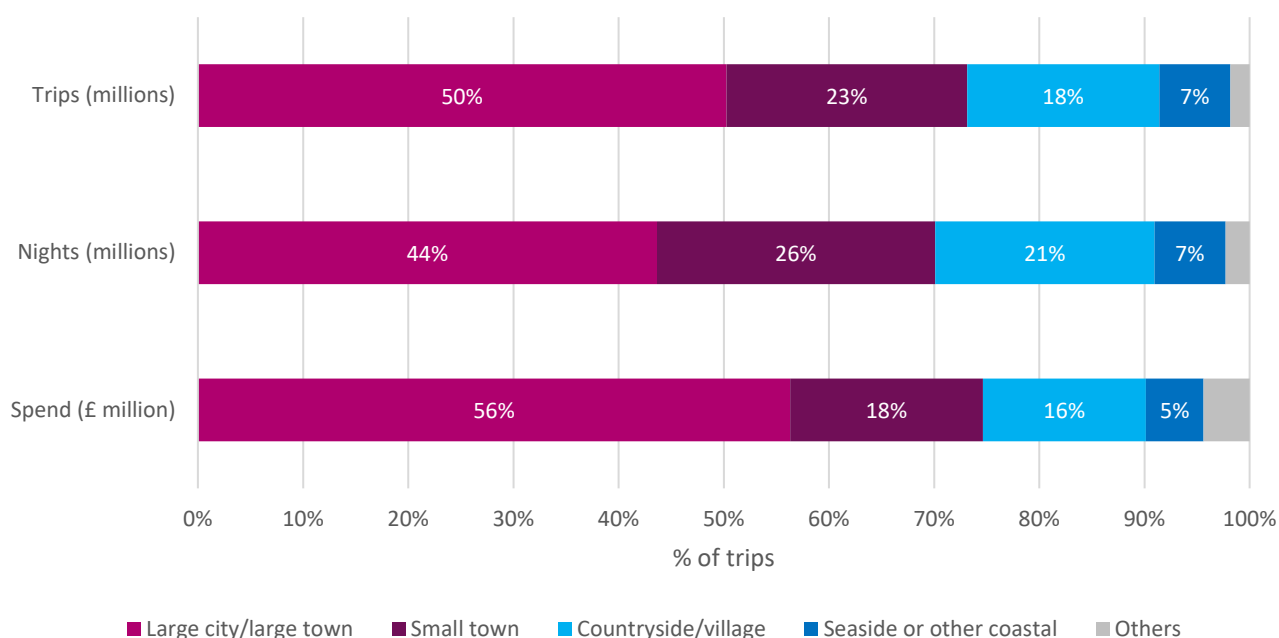
\*Data based on a sample size lower than 30

## Main Location visited

in Scotland, Quarter 1 2023 (January – March)

Half of all overnight trips in Q1 2023 were to the cities and large towns of Scotland. Trips to large cities and towns also made up 44% of the total nights and 56% of the total expenditure. Just under a quarter went to small towns, making up 26% of the total nights and 18% of total expenditure. Just under a fifth of all overnight trips were to countryside/village locations, making up 21% of the total nights and 16% of the total expenditure. An additional 7% of overnight trips to Scotland took place in seaside or coastal locations.

### Main location type visited by domestic overnight visitors to Scotland, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

Main Location Type	Trips (millions)	Nights (millions)	Spend (£ million)
Large city/large town	1.4	3.0	361
Small town	0.6	1.8	117
Countryside/village	0.5	1.4	99
Seaside or other coastal*	0.2	0.5	35
Others*	0.0	0.2	28
<b>Total</b>	<b>2.7</b>	<b>6.9</b>	<b>641</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

\*Data based on a sample size lower than 30

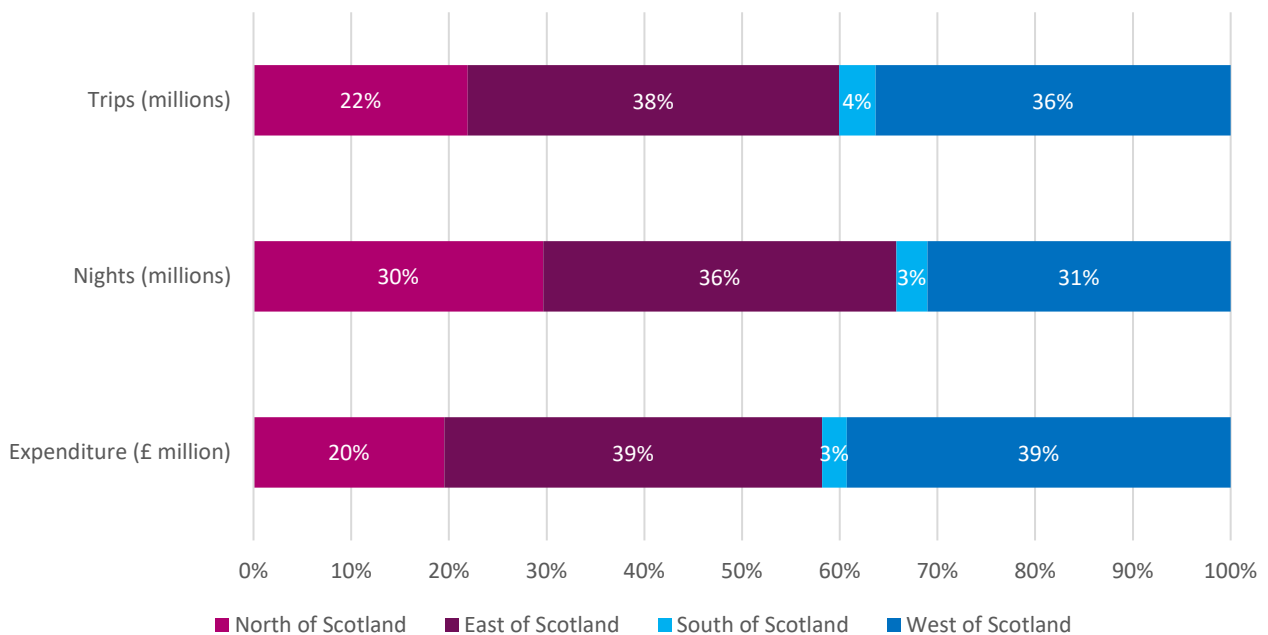


## Main Region Visited

in Scotland, Quarter 1 2023 (January – March)

There was a relatively even spread of overnight trips between the East and West of Scotland, with each of these regions accounting for over a third of trips. The North of Scotland was the main region visited for just under a quarter of trips. The South of Scotland was the main region visited for 4% of overnight trips. A similar pattern was seen across the regions in terms of the proportion of spend, while there was a slightly more even spread in terms of nights across the North, East and West of Scotland (30%, 36% and 31% respectively).

### Main region visited on trips taken by domestic overnight visitors to Scotland, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

Main Region visited	Trips (millions)	Nights (millions)	Spend (£ million)
North of Scotland	0.5	1.9	121
East of Scotland	0.9	2.4	239
South of Scotland*	0.1	0.2	16
West of Scotland	0.9	2.0	243
<b>Total**</b>	<b>2.4</b>	<b>6.5</b>	<b>619</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

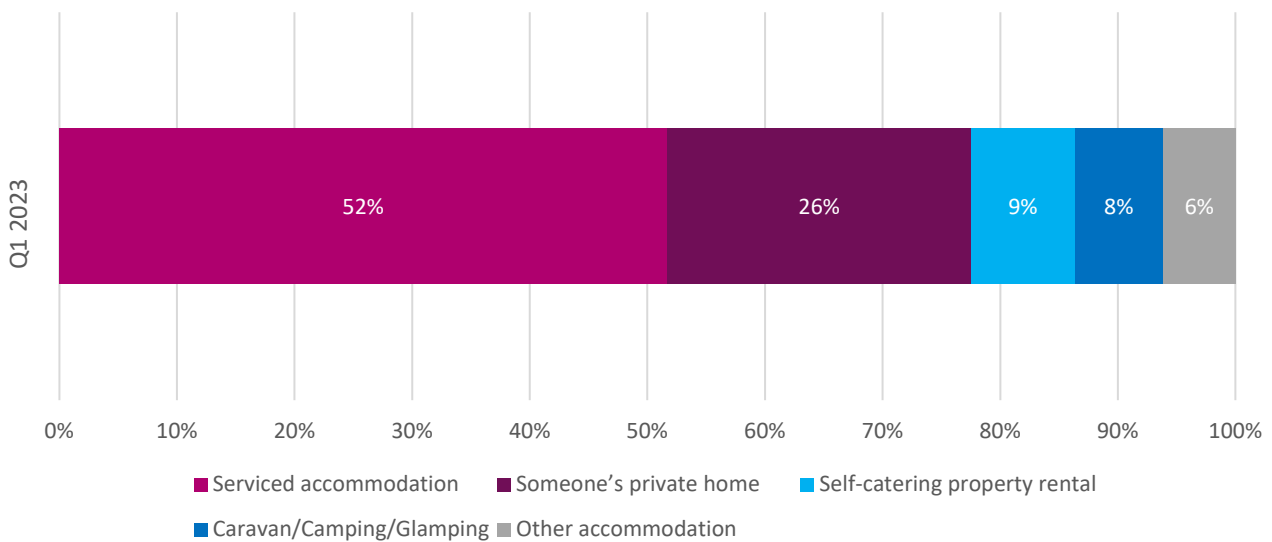
\*Data based on a sample size lower than 30

\*\*Please note main region visited may have been outside of Scotland

## Accommodation Used on Overnight Trips Taken in Scotland, Quarter 1 2023 (January – March)

Just over half of all overnight trips to Scotland were in serviced accommodation. Just over a quarter chose to stay in someone’s private home, which includes the home of friends or relatives as well as second homes. Around 1 in 10 (9%) chose self-catering properties as their accommodation with a similar proportion choosing caravan/camping/glamping (8%).

Accommodation type used on overnight trips taken in Scotland, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

Accommodation Type	Trips (millions)
Serviced accommodation	1.4
Someone's private home	0.7
Self-catering property rental*	0.2
Caravan/Camping/Glamping*	0.2
Other accommodation*	0.2
<b>Total</b>	<b>2.7</b>

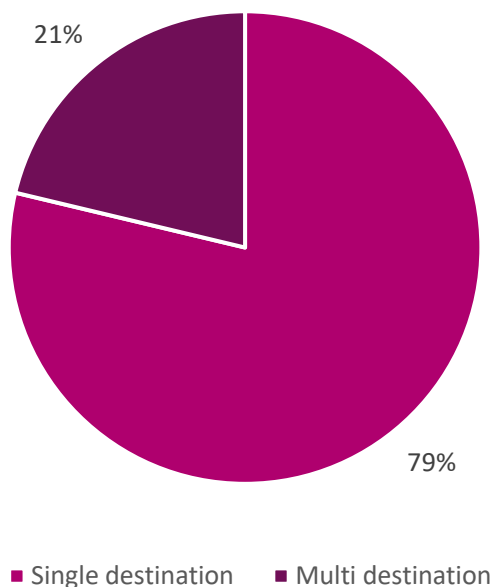
Source: Great Britain Tourism Survey Q1 2023 (January - March)

\*Data based on a sample size lower than 30

## Number of Places visited on Overnight Trips in Scotland, Quarter 1 2023 (January – March)

Most trips in Q1 2023 were single destination trips, with just 21% visiting two or more places. This reflects the proportion of holiday trips (35%), which are more likely to be multi destination but contrasts with trips to friends and relatives as well as business trips, which are more likely to be single-destination.

### Number of places visited on overnight trips in Scotland, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

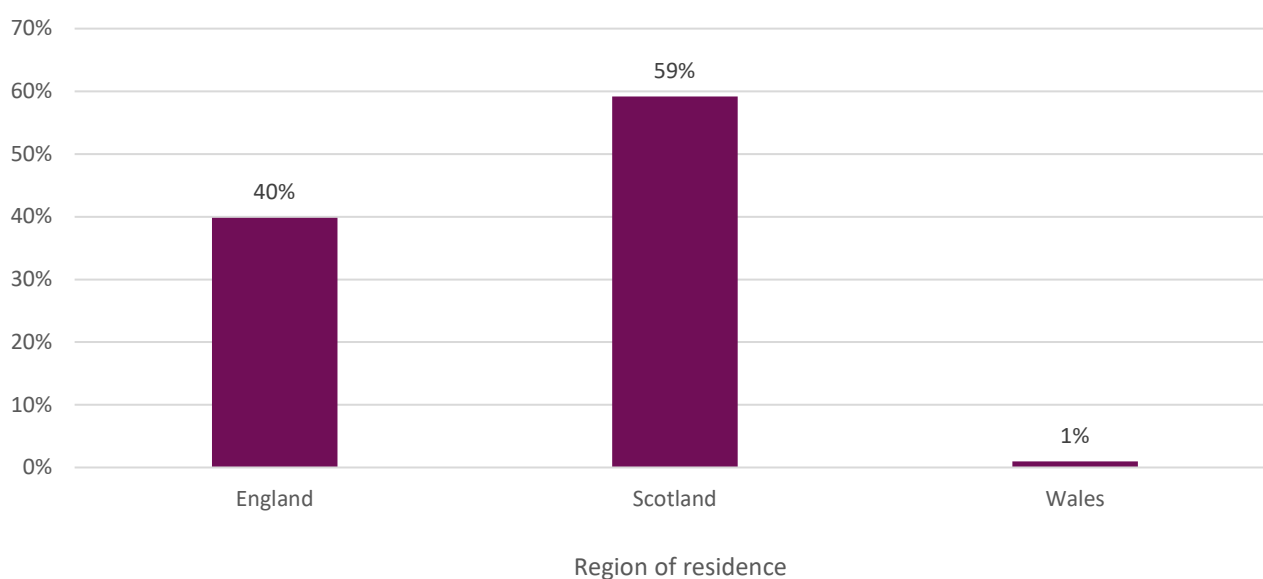
Number of places visited	Trips (millions)
Single destination	2.2
Multi destination	0.6
<b>Total</b>	<b>2.7</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)  
Please note: Individual figures may not add to totals due to rounding.

## Who Took Domestic Overnight Trips in Scotland, Quarter 1 2023 (January – March)

Residents of Scotland generated the highest volume of trips nights and spend in Scotland accounting for 59% of trips, 46% of nights and 40% of overall spend. Residents of England generated almost all remaining trips (40%), nights (46%) and spend (40%), with Welsh residents making up just 1% of overnight trips, 1% of nights and 2% of overall spend.

### Percentage of overnight trips taken in Scotland by region of residence, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

### Trips, nights and spend in Scotland by region of residence, Q1 2023

Region of residence	Trips (millions)	Nights (millions)	Spend (£ million)
England	1.1	3.2	255
Scotland	1.6	3.6	374
Wales*	0.0	0.1	12
<b>Total</b>	<b>2.7</b>	<b>6.9</b>	<b>641</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

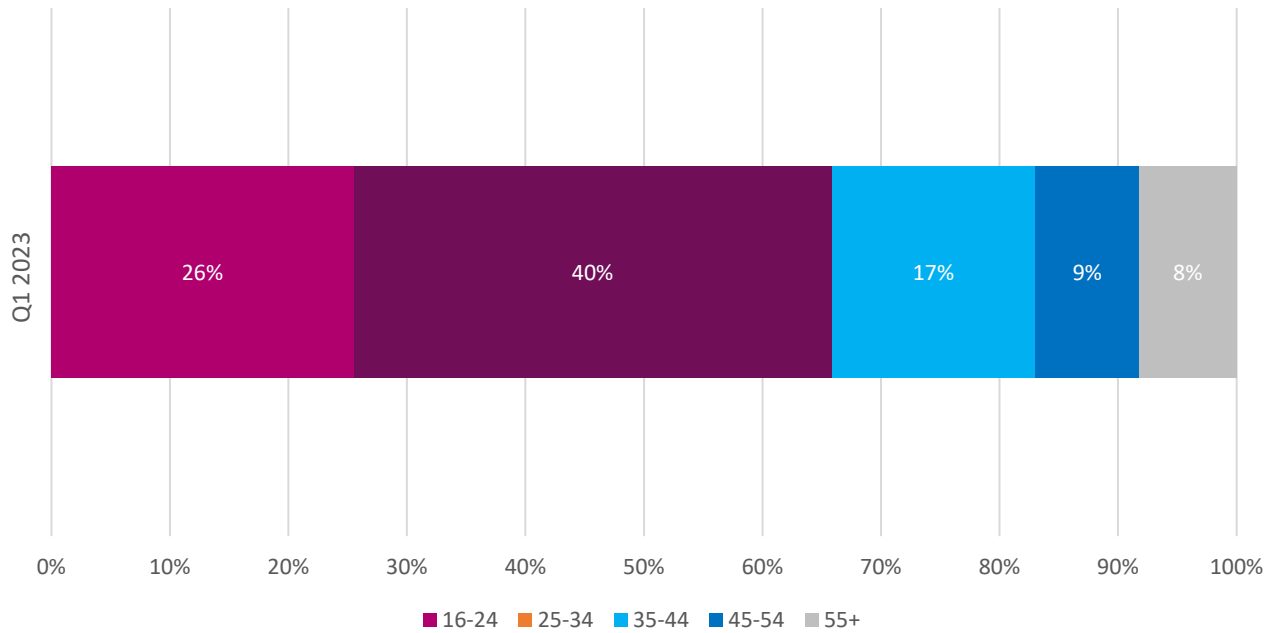
Please note: Individual figures may not add to totals due to rounding. A small minority of respondents may also live within a National Park region

## Age Range of Overnight visitors

to Scotland, Quarter 1 2023 (January – March)

Around nine out of ten overnight trips were taken by visitors under the age of 55 (92%). Visitors aged between 16 and 34 generated two thirds of overnight trips (66%), while those aged 35-54 generated around a quarter of overnight trips (26%).

### Age of visitors on domestic overnight trips taken in Scotland, Q1 2023



Source: Great Britain Tourism Survey Q1 2023 (January - March)

Age group	Trips (millions)
16-24	0.7
25-34	1.1
35-44	0.5
45-54*	0.2
55+*	0.2
<b>Total</b>	<b>2.7</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)

\*Data based on a sample size lower than 30

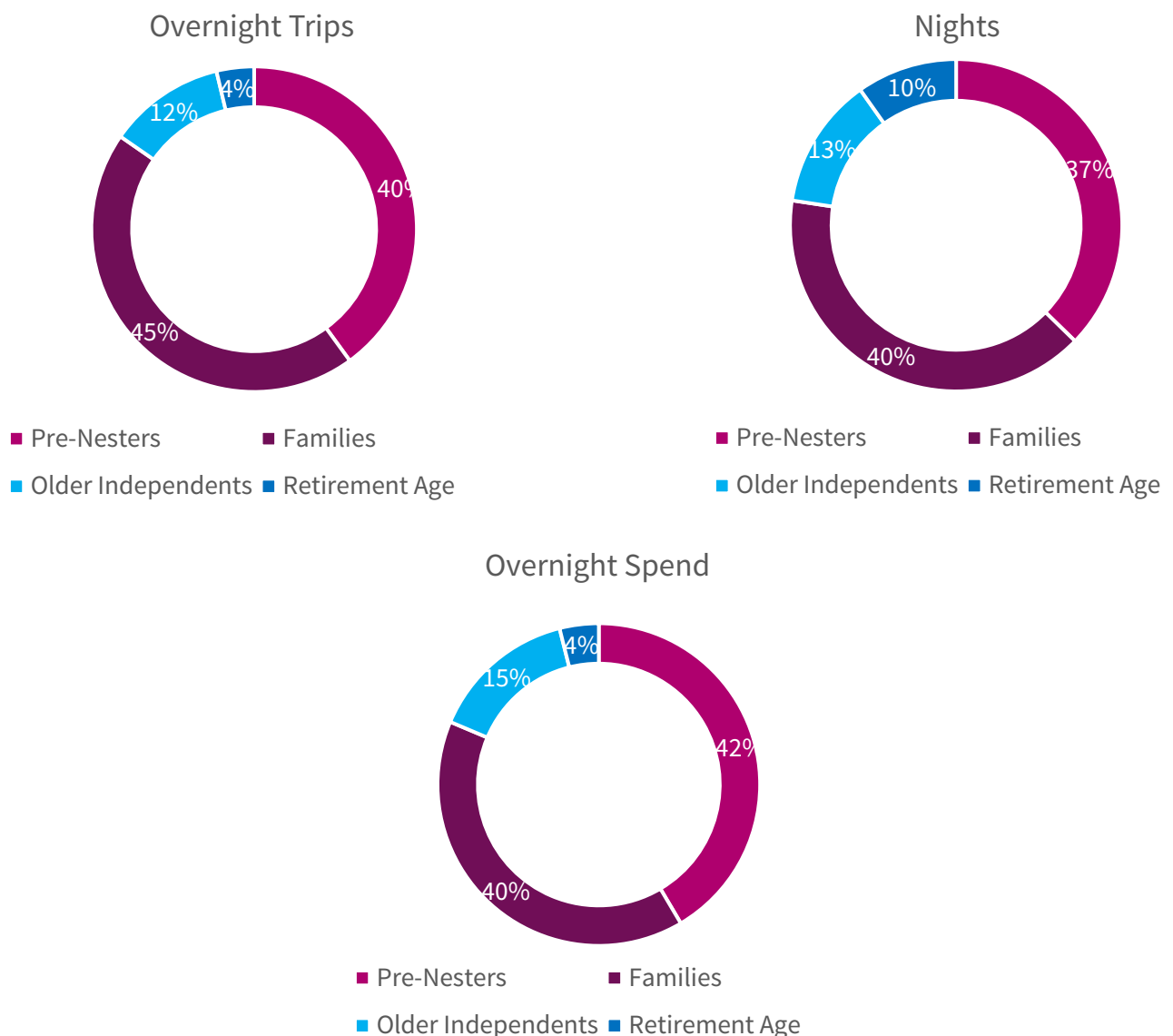
## Life Stage of Overnight visitors

to Scotland, Quarter 1 2023 (January – March)

Families accounted for the highest proportion of overnight trips (45%) and nights (40%) in Scotland. Pre-nesters accounted for the second highest number of overnight trips (40%) and nights (37%) but made up the largest proportion of the overall spend (42%). Visitors of retirement age represented the lowest proportion of overnight trips (4%), nights (10%) and spend (4%).

Definitions of segments	
Pre-Nesters	16-34, no children
Families	16-64, with children
Older Independents	35-64, no children
Retirement Age	65+

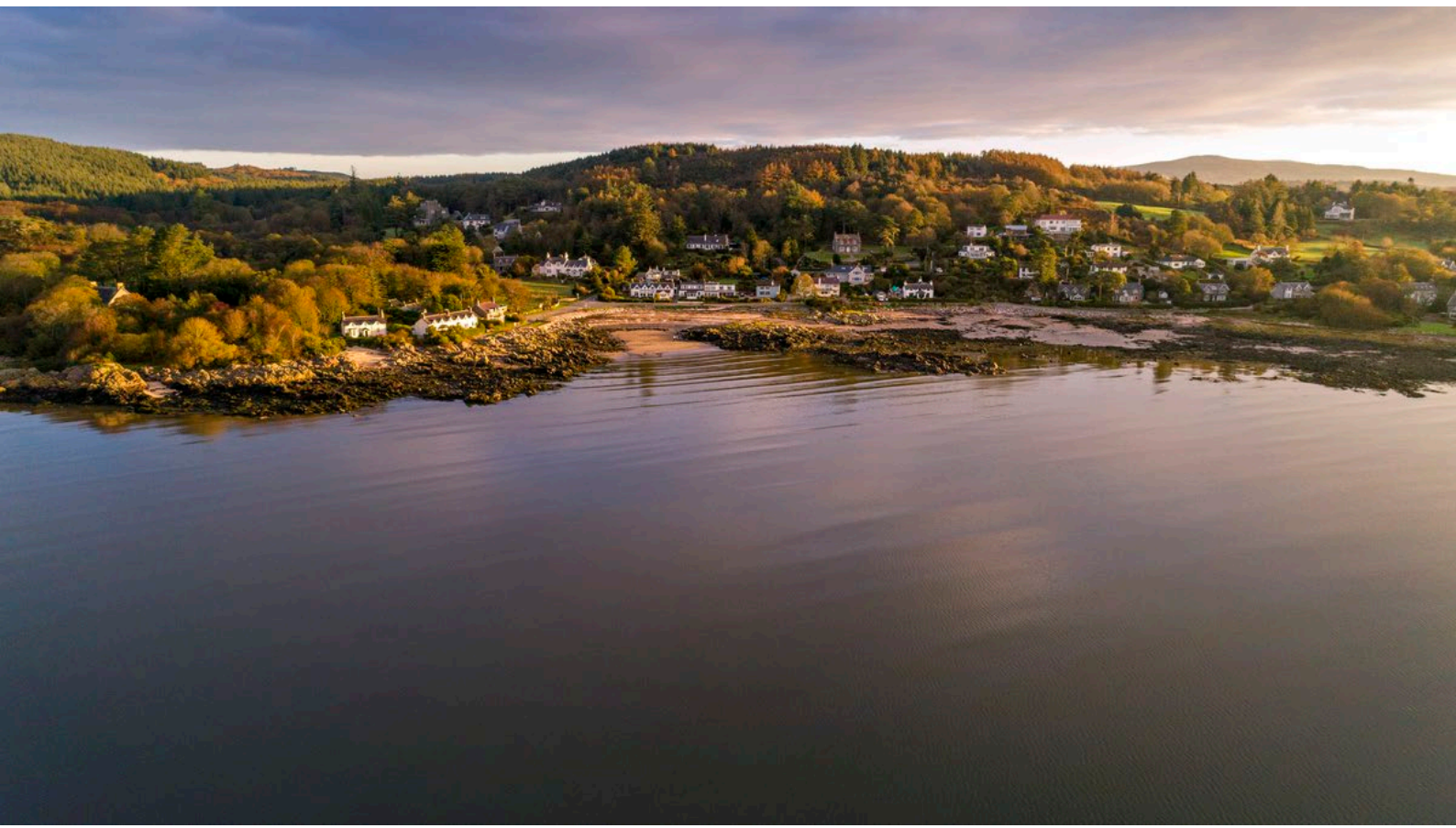
Please note the definition of life stages has been amended from previously published reports to bring consistency between Scotland, England and Wales reporting. Pre-Nesters remains the same, but changes have been made to the definition of Families, Older Independents and Empty Nesters (terminology has also been changed to Retirement Age).



**Life stage of visitors on domestic overnight trips taken in Scotland, Q1 2023**

<b>Life stage</b>	<b>Trips (millions)</b>	<b>Nights (millions)</b>	<b>Spend (£ million)</b>
Pre-Nesters	1.1	2.6	266
Families	1.2	2.8	256
Older Independents	0.3	0.9	94
Retirement Age	0.1	0.7	25
<b>Total</b>	<b>2.7</b>	<b>6.9</b>	<b>641</b>

Source: Great Britain Tourism Survey Q1 2023 (January - March)



## **Appendix: Methodology and Quality**



## Definitions

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To qualify as an eligible GB Domestic Overnight Trip the following criteria must be met:

- involved a stay of at least one night in the nations of Great Britain
- not taken on a frequent basis –takes place less often than once a week
- GB Domestic Overnight Holiday Trips – the main purpose of the trip was for holiday, pleasure or leisure
- GB Domestic Overnight VFR Trips –the main purpose of the trip was for visiting friends and relatives, including VFR trips that were combined with a holiday.
- GB Domestic Overnight Business Trips – the main purpose of the trip was for business
- GB Domestic Overnight Miscellaneous Trips – the main purpose of the trip was for any other type of trip taken not covered by the above classifications including personal events, public events, study, medical, religious reasons and any overnight stays in the UK as part of any overseas trip.
- **Volume** - an estimate of what the grossed-up number of overnight trips undertaken by the population within the time would be if the quota sample is representative of the whole GB population
- **Value** - an estimate of what the total expenditure relating to the volume of overnight visits undertaken by the population would be if the quota sample is representative of the whole GB population
- **Bednights** - an estimate of what the grossed-up number of nights spent on overnight trips undertaken by the population would be if the quota sample is representative of the whole GB population.
- **Pre-nesters** – aged 16-34 with no children
- **Families** – aged 16-54 with children
- **Older Independents** – aged 35-54 with no children
- **Empty Nesters** – aged 55+

These qualifying criteria and definitions have been revised to align with agreed international standards which impacts on comparability of the published domestic overnight tourism estimates for 2021, 2022 and 2023 with those published for 2019 and previous years.

## Methodology

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In 2019, the producers of the domestic tourist statistics, VisitScotland, Visit Wales, and VisitEngland, undertook a review of the requirements and methods for producing the statistics to help future-proof the data collection methods, whilst maintaining the reliability and robustness of the information reported. As a result, substantial changes were introduced as part of a new combined online survey method collecting data on both domestic overnight trips as well as domestic day trips. This represents a fundamental change in the way data is collected for overnight visits including moving to an online-panel, non-probability survey methodology from the previous face-to-face non-probability methodology.

The sample for the combined online survey is sourced from 4 ESOMAR accredited online panel providers and includes quotas for key demographic variables and region of residence to make the overall sample as representative as possible of GB population. The target annual sample size for GBTS is 60,000 completed interviews. For the Quarter 1 2023 survey, fieldwork started in England, Scotland and Wales in January 2023 and the number of interviews achieved for the period January to December 2023 is 17,957 interviews for GB residents including 2,717 interviews with Scottish residents.

As part of the survey changes, a revised weighting scheme has been introduced to improve efficiency, whilst making the results as representative as possible of the GB population. However, the use of a non-probability online sample limits the extent to which the survey responses are truly representative of the full GB population, a limitation of all online sample surveys.

Further details of the changes to survey method, sample design and estimation approaches are also available in the **GBTS 2022 Background Quality Report**. A 2023 report will be produced when all 2023 data is available.

## Comparability and coherence

Statistics for domestic overnight tourism have been collected in a broadly similar way since 1989, initially through the United Kingdom Tourism Survey (UKTS), and since 2011 through the Great Britain Tourism Survey (GBTS). However, the changes in survey methodology introduced in 2021, together with the interruption in data collection in 2020 and early 2021 due to Covid-19, means that results published from April 2021 onwards are not directly comparable with data published for 2019 and previous years.

As part of the survey, respondents are asked about any overnight trips they have taken in the 4 full weeks prior to their date of interview (reference period). Estimates are reported for individual calendar months as well as for quarterly and annual periods. As the interview reference periods do not exactly correspond with calendar months and each month may contain a 4- or 5-week reporting period, an adjustment is made using a seasonal smoothing factor to improve monthly comparisons within and between years. The monthly estimates are subject to limitations on sample size and seasonal fluctuations in trip taking across the year.

The new combined survey includes revised questions to help align the key measures of trips, nights and expenditure with internationally agreed definitions for overnight tourism trips. This will enable more accurate reporting of tourism specific trips and improve comparability with trips reported by other destinations using the internationally agreed definitions. The new combined GBTS and GBDVS survey collects information on specific destinations visited in GB. This enables trips and spend estimates to be calculated for Great Britain, the individual nations of Scotland, England and Wales, and sub-national geographies, subject to sample size limitations.

## Accuracy

The statistics produced from the Great Britain Tourism Survey in 2019 and previous years have been designated as official statistics, which provides reassurance to users that the statistics are produced to the very highest professional standards of trustworthiness, quality and value, set out in the [Code of Practice for Statistics](#). Due to the changes in methodology and the impact of the Covid-19 pandemic, the survey results for 2021, 2022 and 2023 have been badged as experimental statistics. The intention is to return to official statistics status in the near future.

As the statistics are produced using a non-probability online survey method, they are subject to the limitations and potential sources of bias and error associated with such surveys. These include:

Coverage error due to the small part of the GB population that does not have online access.

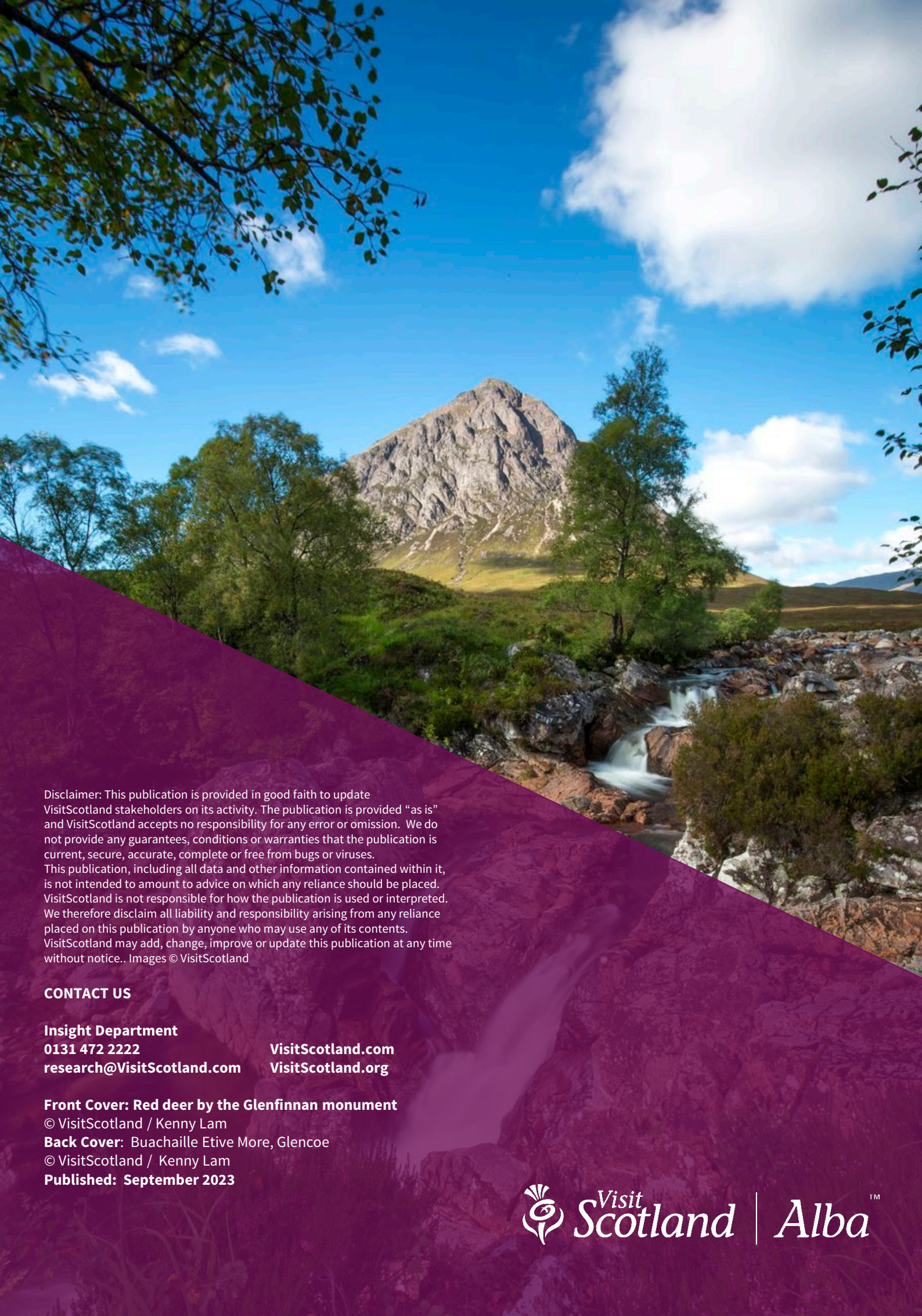
Sample bias including differences due to those with online access and those that are online panel members compared to those who are not.

Measurement error due to respondents entering incorrect values.

Non-response error including survey refusals and drop-outs and the availability of don't know and prefer not to say options.

The GBTS data are weighted to correct for any imperfections in the achieved sample that might lead to bias and to rectify any differences between the sample and the target population. The survey uses a mix of panel partners to mitigate for possible panel specific biases, and keeping this panel mix consistent over time.

The survey script and data processing includes bespoke checks to verify the accuracy of responses. Imputation is used to cover missing data and caps are used to minimise the impact of extreme values that are entered. It is not possible to measure standard sample errors due to the non-probability sample being used, but base sizes are reported for eligible trip takers and users are advised to consider and be cautious of small base sizes particularly for monthly data and lower-level geographies when drawing inferences from the statistics.



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#### CONTACT US

##### Insight Department

0131 472 2222

[research@VisitScotland.com](mailto:research@VisitScotland.com)

[VisitScotland.com](https://www.VisitScotland.com)

[VisitScotland.org](https://www.VisitScotland.org)

##### Front Cover: Red deer by the Glenfinnan monument

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##### Back Cover: Buachaille Etive More, Glencoe

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