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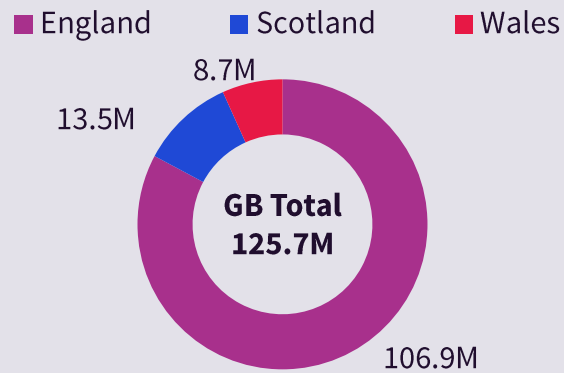
**Great Britain Day Visits Survey  
Annual Report 2022**

# Scotland Tourism Day Visit Statistics (GBDVS)

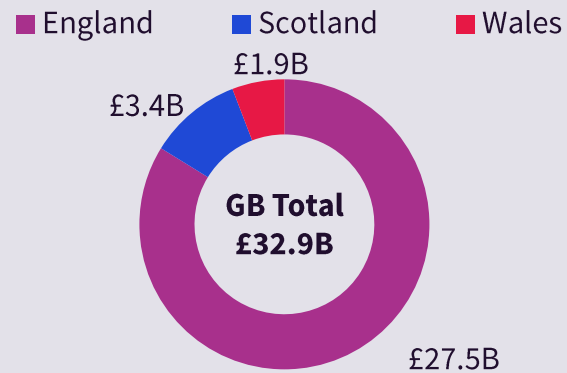
Annual Report 2022

# Great Britain residents took 1.2 billion day and overnight trips to Great Britain in 2022. Spend for all domestic trips to Great Britain in 2022 was £77.9 billion.

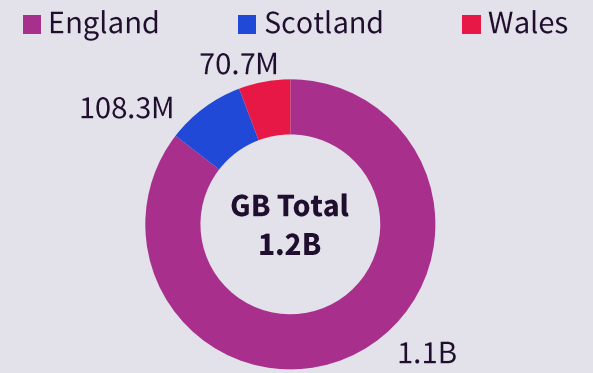
## 2022 Overnight Trips



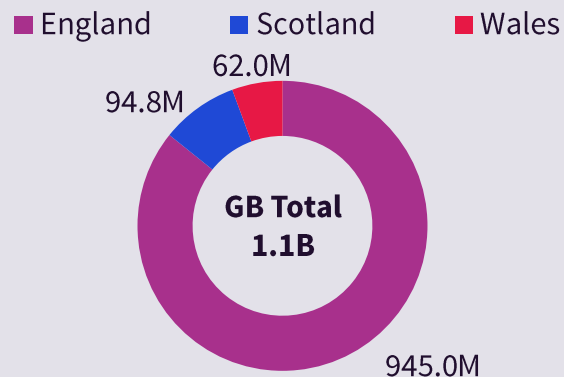
## 2022 Overnight Spend



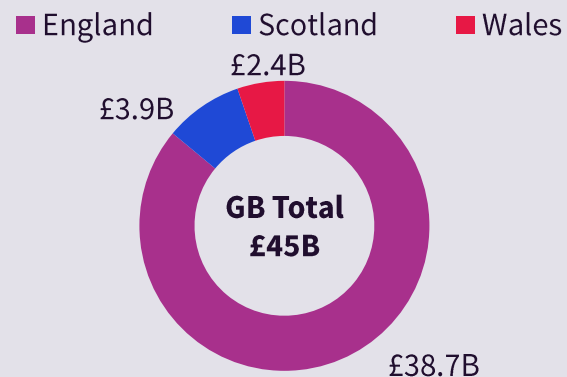
## 2022 Day Visits and Overnight Trips



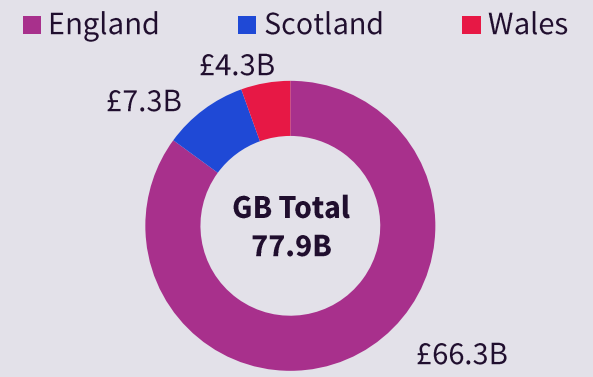
## 2022 Tourism Day Visits



## 2022 Day Visit Spend



## 2022 Day Spend and Overnight Spend



# Contents

- **Introduction, Methodology, Definitions & Context**
- **Summary 2021 and 2022**
  - GB headline results 2022
  - GB tourism day visits by nations by month and quarter 2021 to 2022
  - GB tourism day visit spend by nation by quarter and average spend per visit 2021 to 2022
  - GB tourism day visits by nation of residence versus nation of destination 2022
- **Scotland headline results 2021 and 2022**
  - Tourism day visits and spend in Scotland 2022
  - Tourism day visits and spend by location type of main place visited 2021 to 2022
  - Tourism day visits and spend by activities undertaken 2022
- **Scotland profile of visits 2022**
  - Tourism day visits and spend by region visited and region of residence 2022
  - Tourism day visits by transport used, distance travelled and number of places visited 2022
  - Tourism day visits by lifestage and age 2022
  - Tourism day visits by party size and composition 2022
- **Appendix**
  - Great Britain and Scotland Day Visit Statistics Annual Tables 2021 and 2022

# Introduction

- The Great Britain Day Visits Survey (GBDVS) is a national consumer survey. It measures the volume and value of domestic tourism day visits by residents of Great Britain. This report focuses on the domestic tourism day visit statistics for 2022 for Scotland. Throughout the report the tourism day visit statistics for 2021 are used to highlight trends in visits and spend. Please note the 2021 data (April to December) is revised data. Detailed results for England and Wales are published by [VisitEngland](#) and [Visit Wales](#) respectively.
- The statistics from 2021 onwards are based on a new combined online survey. This one replaces the separate Great Britain Tourism Survey (GBTS) and Great Britain Day Visits Survey (GBDVS), which ran until the end of 2019. Methodology and quality reports are available for further detail on the [VisitScotland](#) website. This includes guidance on non-comparability with data up until 2019.
- This report includes data for three definitions of leisure day visits: Tourism Day Visits (the standard definition, which this report focuses on); 3+ hour Leisure Day Visits (the broadest measure); Tourism Day Visits – Activities Core to Tourism (the narrowest measure).
- This report provides information about visit characteristics, with comparisons where appropriate.
- The results for 2021 and 2022 report on different periods of data collection, for 2021 the period is April to December and for 2022 it's Jan to Dec. This is due to the COVID-19 pandemic when it was not possible to travel for the first 3 months of 2021 because of lockdown restrictions where tourism day visits were not permitted. The results are comparable across nations (England, Scotland and Wales).
- The survey is jointly sponsored by VisitEngland, VisitScotland and Visit Wales. The survey is currently undertaken by independent research agency, BMG. Together with the Great Britain Overnight Tourism Survey (GBTS), which is available as a separate report, these surveys are the largest and most comprehensive surveys of GB domestic travel.

# Methodology (1/2)

- The annual sample size for GBDVS is 35,000 respondents. These numbers include respondents who have not taken any qualifying visits. The annual samples are split evenly across the 52 weeks of the year.
- Since 2020, the GBDVS has been using an online blended panel approach, which is a significant change from the pre-2020 face-to-face methodology. Respondents are sourced via an online platform that combines a number of ESOMAR accredited panel providers.
- Data is collected about the number of domestic day visits taken by adults aged 16+ in England, Scotland and Wales. The survey also collects details of any children involved with day visits, and these are included in the estimated grossed-up figures for visit and spend.
- A number of changes were made to the questionnaire in 2022, the pre-2022 data has been calibrated to account for these changes.
- Data was collected for 9 months in 2021 (April to December) versus 12 months in 2022 (January to December). This is due to the COVID-19 pandemic where travel was restricted. While the annual 2021 and 2022 data isn't directly comparable due to the different travel time periods, commentary on relevant differences between April to December 2021 and April to December 2022 is provided throughout this report.
- The GBDVS 2021 and 2022 data has been published as experimental statistics. More information on this can be found on the [Office for National Statistics](#) website.
- The monthly estimates are subject to limitations on sample size and seasonal fluctuations in visits taken across the year.

# Methodology (2/2)

- Interlocking quotas have been used where feasible. Within each country, quotas are set by age and gender (interlocking), approximated social grade and Scotland regions. The data is weighted to more accurately reflect the population.
- Base sizes are the number of qualifying day visits, rather than the number of respondents. Quarterly targets are utilised for Scotland and Wales due to small monthly base sizes.
- Number of day visits for 2022 estimations based upon:

Nation	Unweighted Base Sizes 2022 for Tourism Day Visits
GB	10,461
England	8,219
Scotland	1,312
Wales	1,035

- More detailed information on methodology changes, quotas and weighting can be found by accessing the Background Quality Report available at the [VisitScotland](https://www.visitScotland.co.uk) website.

# Definitions

There are 3 main measures for day visits in this report – 3hr+ Leisure Day Visits (the widest measure), Tourism Day Visits (the standard measure) and Tourism Day Visits – Activities Core to Tourism (the narrowest measure). Tourism Day Visits are a subset of the broader leisure day visits. To qualify as an eligible Great Britain day visit, the following criteria must be met:

## 3hr+ Leisure Day Visits

- Lasted 3 hours or more (including travel time)
- Undertake 1 or more eligible leisure activities
- Must not have been overnight

## Tourism Day Visits – the main focus of this report

- In addition to the 3hr+ leisure day visit criteria, a Tourism Day Visit:
- Is undertaken less often than once a week
  - Includes a visit to a place outside of the local authority where the visit started, with the exception of visits where the main activity is a visitor attraction, attending a public event or to watch live sport. In these cases the need to have visited outside of the starting local authority is removed.

## Tourism Day Visits – Activities Core to Tourism

- In addition to the tourism day visit criteria, a visit must have included one of the following as the main activity undertaken during the visit:
- Went to a visitor attraction e.g., a historic house, theme park, museum, etc.
  - Went sightseeing and exploring areas; Spa/beauty/health treatments.
  - Retreat or meditation.
  - Attended an organised public event (e.g., exhibition, concert, fair, live sport etc.).
  - Visited an art gallery.
  - Visited a museum.
  - Went to a local cultural centre.
  - Watched live sport (not on TV).



# Context

- **Cost-of-Living:** UK inflation, as measured by the Consumer Prices Index (CPI), started to increase during late spring 2021 and rose fairly steadily throughout the rest of 2021 and 2022, peaking at 11.1% in November 2022. The average inflation rate in the UK for 2022 based on CPI was 9.2%. This may have had an impact on the distance, duration and number of places visited on domestic visits, whereby British residents decreased the distance travelled, reduced the length of the day visit and reduced the number of locations visited on a day visit.
- **Industrial actions:** Research by the ONS found nearly 1 in 5 people had travel plans disrupted during December 2022 due to strike action in the transport sector. Almost half of those affected said they were unable to attend leisure activities.
- **Weather:** Overall, 2022 was the warmest year on record for the UK and also one of the sunniest. A new UK record temperature of 40.3° C was recorded in July, but it was June and August that were particularly sunny.
- **COVID-19:** Full lockdown lifted at end March 2021, which was replaced by a roadmap out of lockdown to July 21. However, it wasn't until February 2022 that the final restrictions on international travel were removed. According to the Visit Britain Domestic Sentiment Tracker, comfort with everyday activities such as eating in a restaurant and visiting indoor activities increased following the lifting of these final restrictions and stabilised by the end of 2022 to an 'average comfort score' of 3.2.

# Summary

# Summary of findings

**NOTE: All comparisons between 2021 and 2022 statistics are for comparable periods, April to December, of both years. All other commentary on the statistics is referencing January to December 2022**

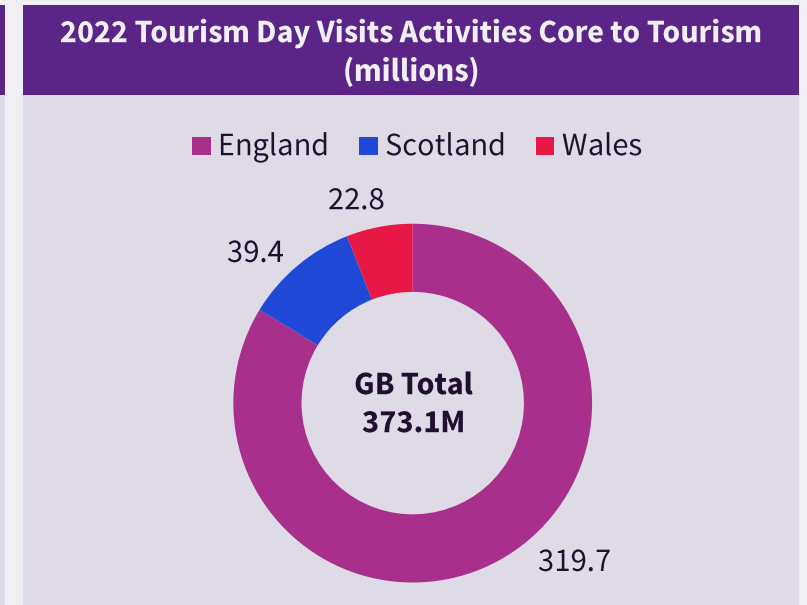
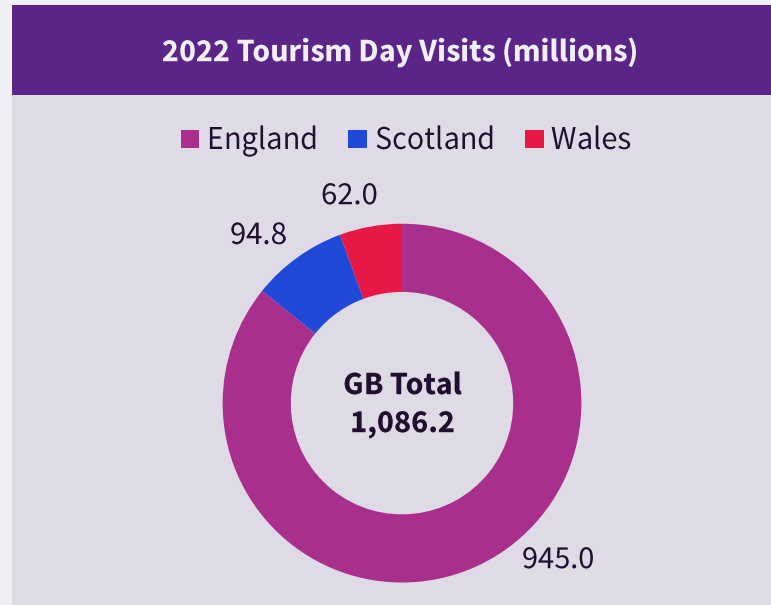
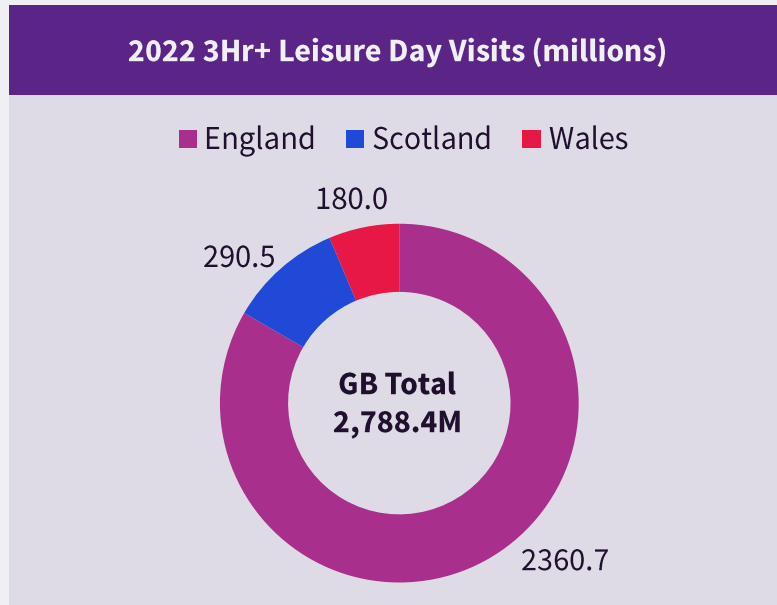
## Great Britain

- There were 2.8 billion leisure day visits to Great Britain lasting 3 hours or more in 2022. Of these, 1.1 billion were tourism day visits. Tourism day visits increased by 42% in 2022, when comparing April to December 2021 and April to December 2022. 373.1 million day visits were taken specifically for activities core to tourism (i.e. visitor attractions) in 2022.
- Spend on tourism day visits to Great Britain also rose in 2022 (when comparing to the same period in 2021) to £45.0 billion, an uplift of 46%, which may reflect rising inflation.
- Cross-nation travel dramatically decreased for tourism day visits in 2022. There was a 7 percentage point decrease in the proportion of visits by England residents to Scotland and a 10 percentage point decrease in visits by England residents to Wales.

## Scotland

- Tourism day visits to Scotland in 2022 (April to December) increased by 39%, when compared to 2021 (April to December). Similarly, spend on tourism day visits increased by 31% in the same time period.
- Half of visits to Scotland in 2022 were to cities and large towns. Visits to small towns appear to have been displaced by visits to cities and large towns, particularly in Q4.
- Visiting friends and relatives remains the most popular day visit activity. The activities that experienced the most significant increases in 2022 were attending an organised public event, attending a personal celebration and going to a cultural experience. This marks a return of the events sector following COVID-19 restrictions.
- In 2022, there was an increase in the proportion of tourism day visits to Scotland that involved travelling less than 5 miles, visiting just one place and lasting less than 5 hours. There was a similar trend of shorter stays and visiting just one place for overnight trips, which could be attributed to the cost of living crisis.
- The impact of rail strikes is evident, with a 10 percentage point decrease in the proportion of visits that used a train, underground or tram. This decline was most apparent in Q4 2022, where there was a 17 percentage point decrease in the use of trains, in comparison to Q4 2021. The proportion of spend on transport also declined (-8pp) in 2022.

# 2022 GB day visit tourism statistics at a glance



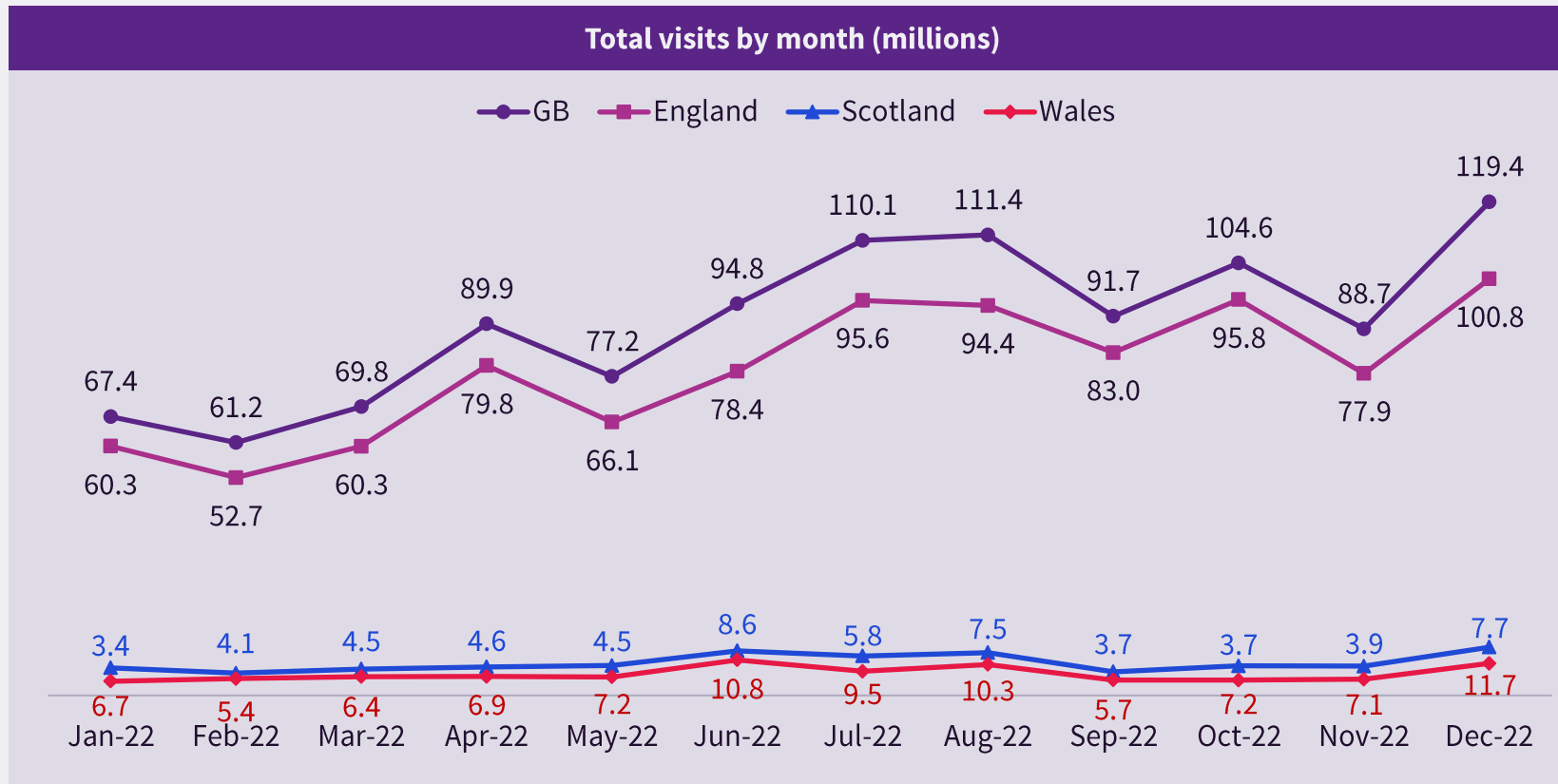
Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	85%	85%
Scotland	10%	9%
Wales	6%	6%

Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	87%	86%
Scotland	9%	9%
Wales	6%	5%

Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	86%	84%
Scotland	11%	10%
Wales	6%	5%

# Tourism day visits by month in 2022

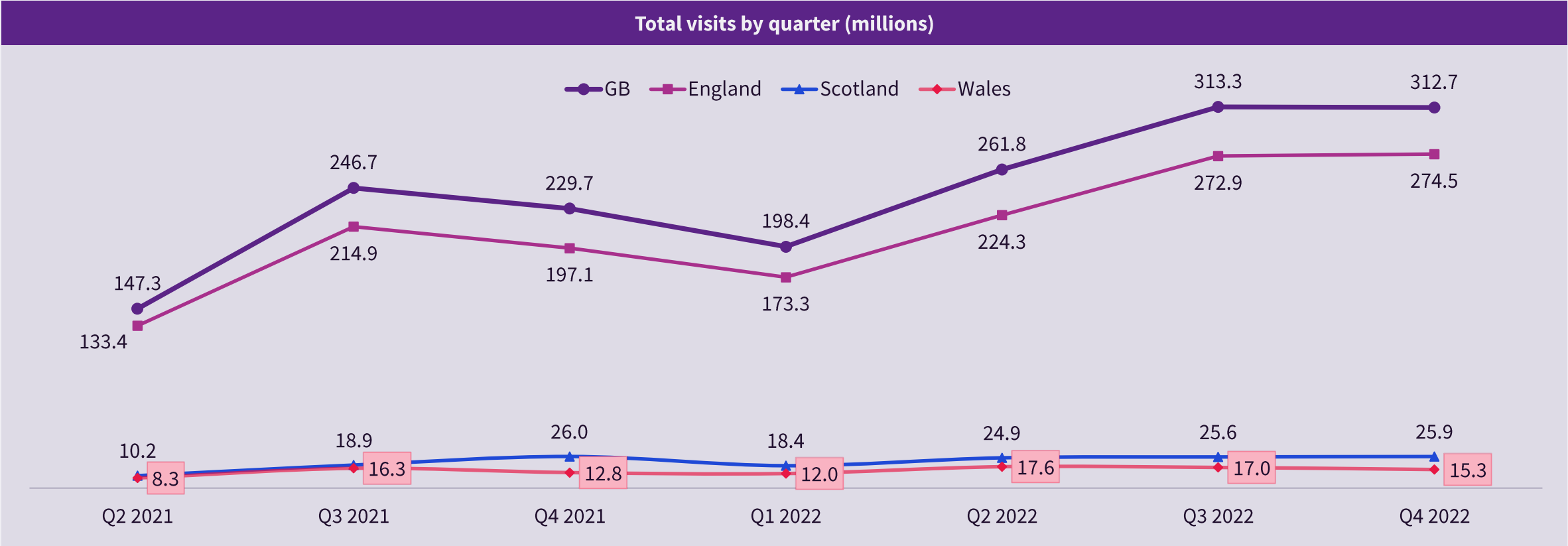
As with overnight trips, December 2022 experienced peak day visits in Great Britain with 119.4 million visits taken, this was largely fueled by visits to friends and family around the Christmas period. Across Great Britain, 2022 (April to December) experienced 42% more day visits than in 2021 (April to December), this was due to the slow return of day visits in April and May 2021 following COVID-19 lockdowns.



Nation	Number of visits 2022 (millions)	Proportion of visits 2022
GB	1086.2	
England	945.0	87%
Scotland	94.8	9%
Wales	62.0	6%

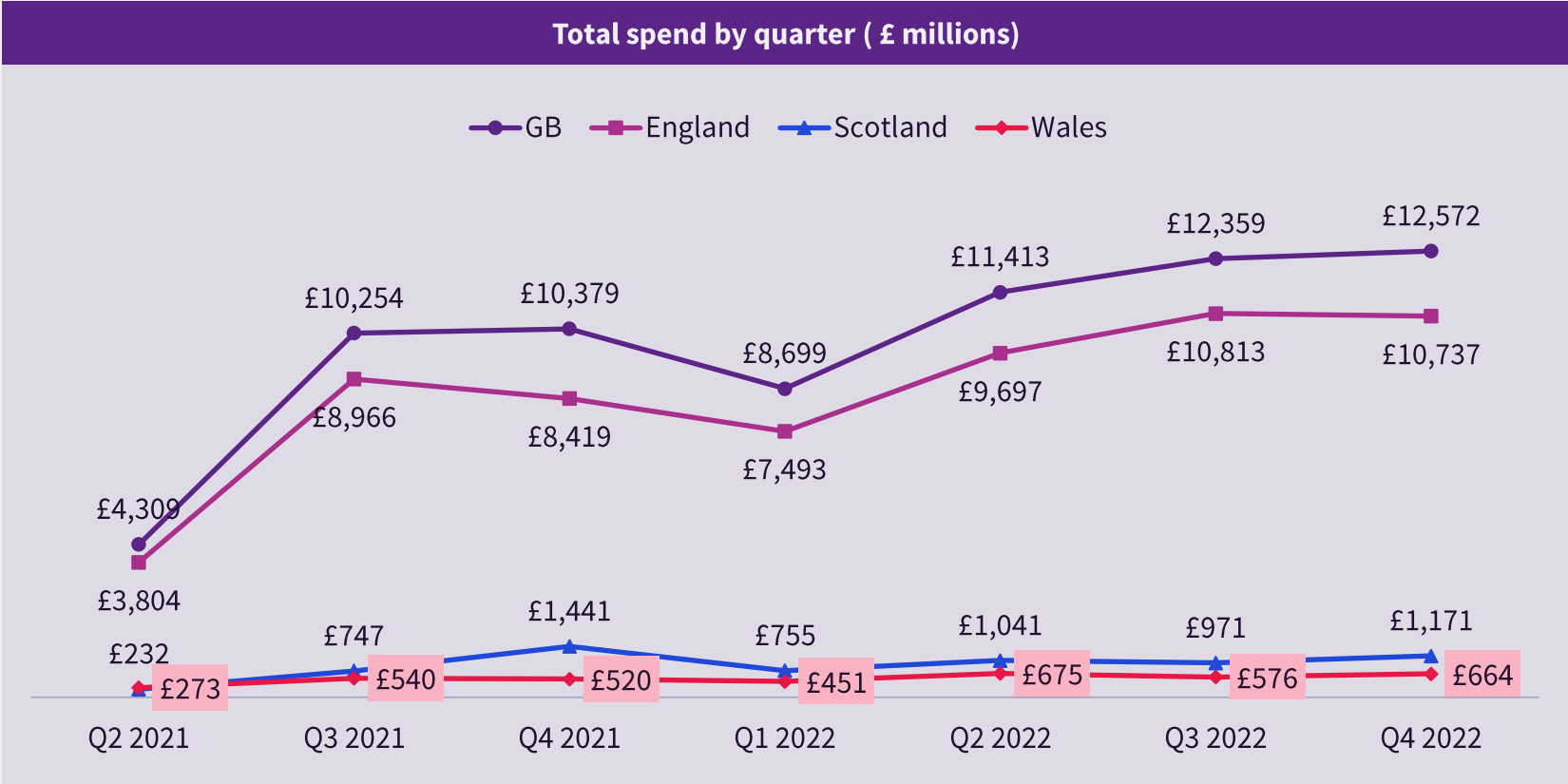
# Tourism day visits by quarter 2021-2022

Day visits to England have steadily increased since Q2 2021, when comparing equivalent quarters. Visits to Scotland, however, have largely remained static since Q2 2022, with a lot less seasonal variation. Visits to Wales do vary by season and Q4 2022 was 20% higher than Q4 2021.



# Tourism day visits spend by quarter 2021-2022

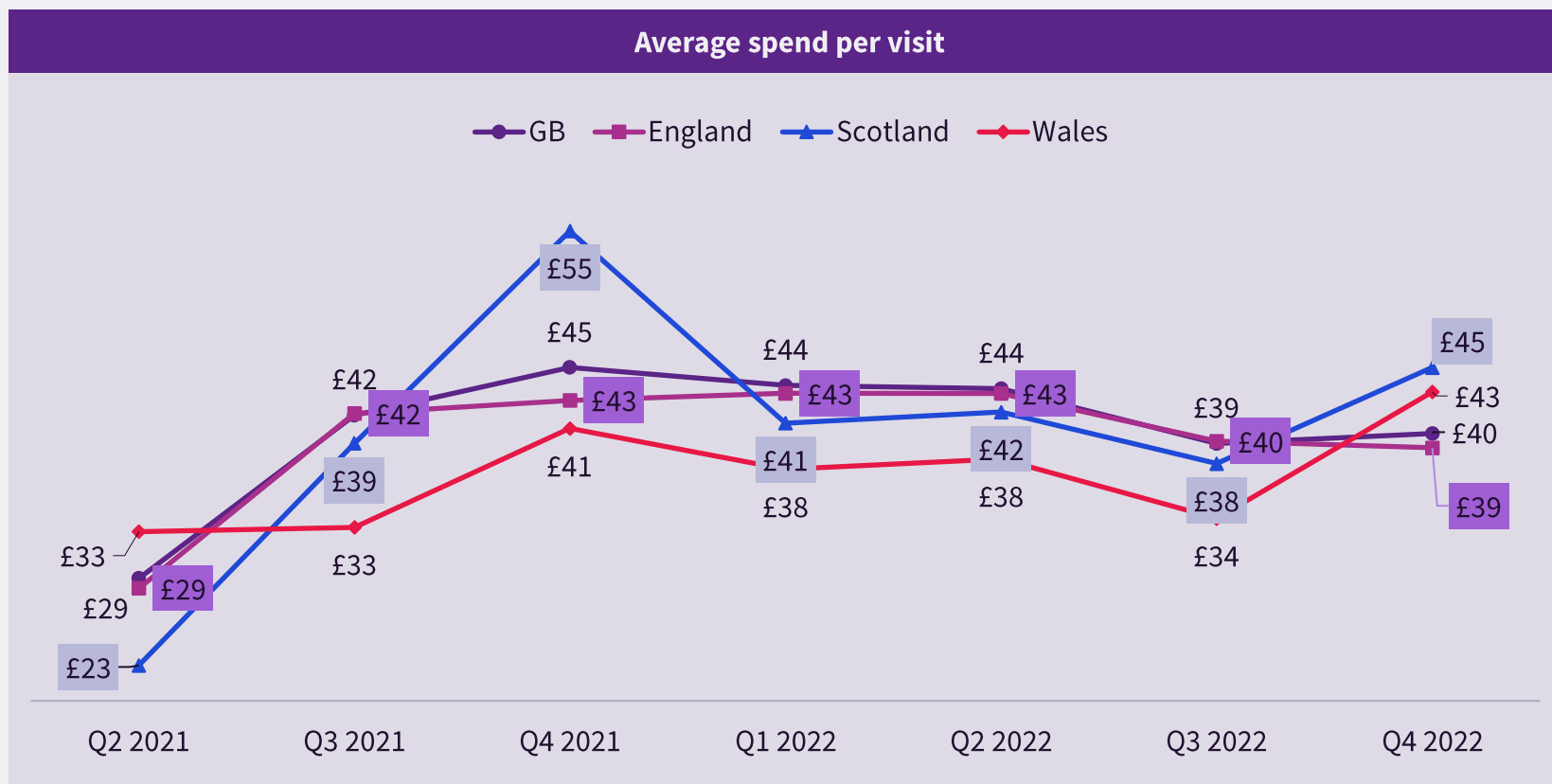
While the Summer (Q3) of 2022 saw record spend among domestic overnight trips to Great Britain (since the beginning of the new statistics in April 2021), Q4 2022 experienced the highest spend for day visits to Great Britain. This is due to spend in both Scotland and Wales in Q4 2022 nudging slightly above spend in Q3 for these nations.



Nation	Total spend 2022 (millions)	Proportion of spend 2022
GB	£45,043	
England	£38,740	86%
Scotland	£3,937	9%
Wales	£2,365	5%

# Average spend per visit 2021-2022

Average spend per visit has increased for all nations except Scotland, when comparing April to December 2021 and April to December 2022. While there were large increases in average spend on overnight trips, the increase for day visits is much more muted and appears less impacted by the rising cost of living.

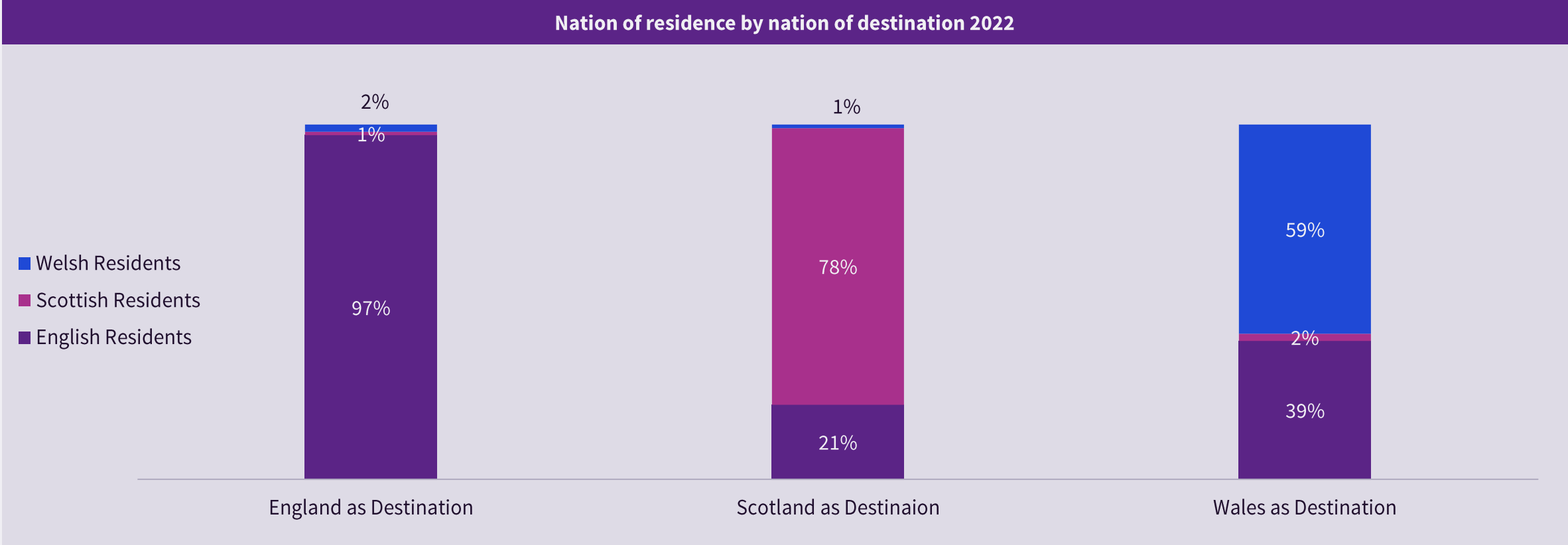


Nation	Average spend per visit 2021 (April to December)	Average spend per visit 2022 (April to December)
GB	£40	£41
England	£39	£40
Scotland	£44	£42
Wales	£36	£38



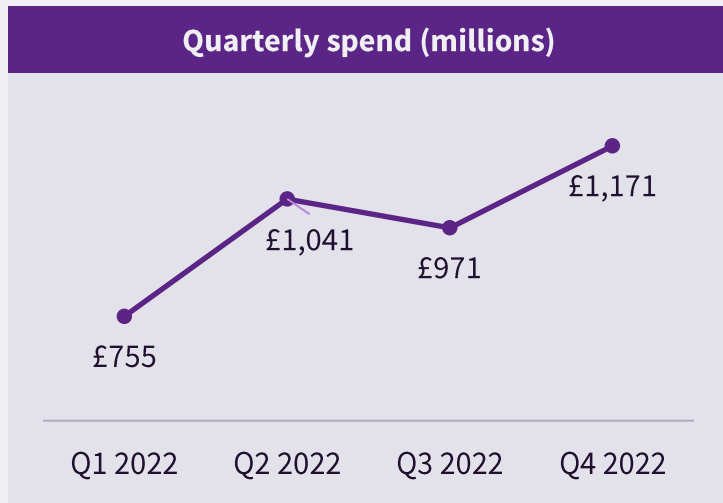
# Nation of residence by nation of destination in 2022

Day visits are much more nation centric than overnight trips, almost all tourism day visits in England were taken by England residents and 8 in 10 Scotland visits were taken by Scotland residents. Wales, as with overnight trips, experienced the most cross-nation visits. Interestingly, when compared to 2021 (April to December), day visits by England residents to Scotland and Wales dropped significantly in 2022 (April to December). There was a 7 percentage point decrease in the proportion of visits by England residents to Scotland, and a 10 percentage point decrease in visits by England residents to Wales.



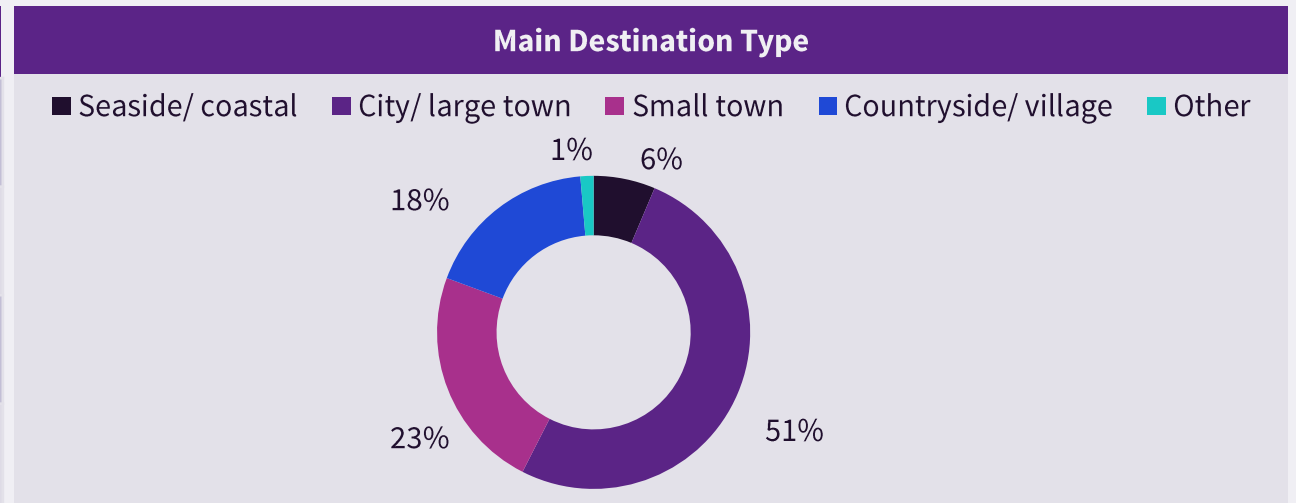
# Scotland Tourism Day Visits 2021-2022

# Summary of tourism day visits to Scotland in 2022



### Average spend per visit

Q1 2022	£41
Q2 2022	£42
Q3 2022	£38
Q4 2022	£45



# Tourism day visits and spend in Scotland 2022

Tourism day visits to Scotland in 2022 (April to December) increased by 39%, when compared to 2021 (April to December). Similarly, spend on tourism day visits increased by 31% in the same time period. However, this means that average spend slightly dropped in 2022, which could be in response to the rising cost of living. For overnight trips there was a reduction in the number of nights spent on a trip, for tourism dayvisits there's a shift to shorter visits within closer proximity, which could potentially be less expensive.

## 94.8m visits

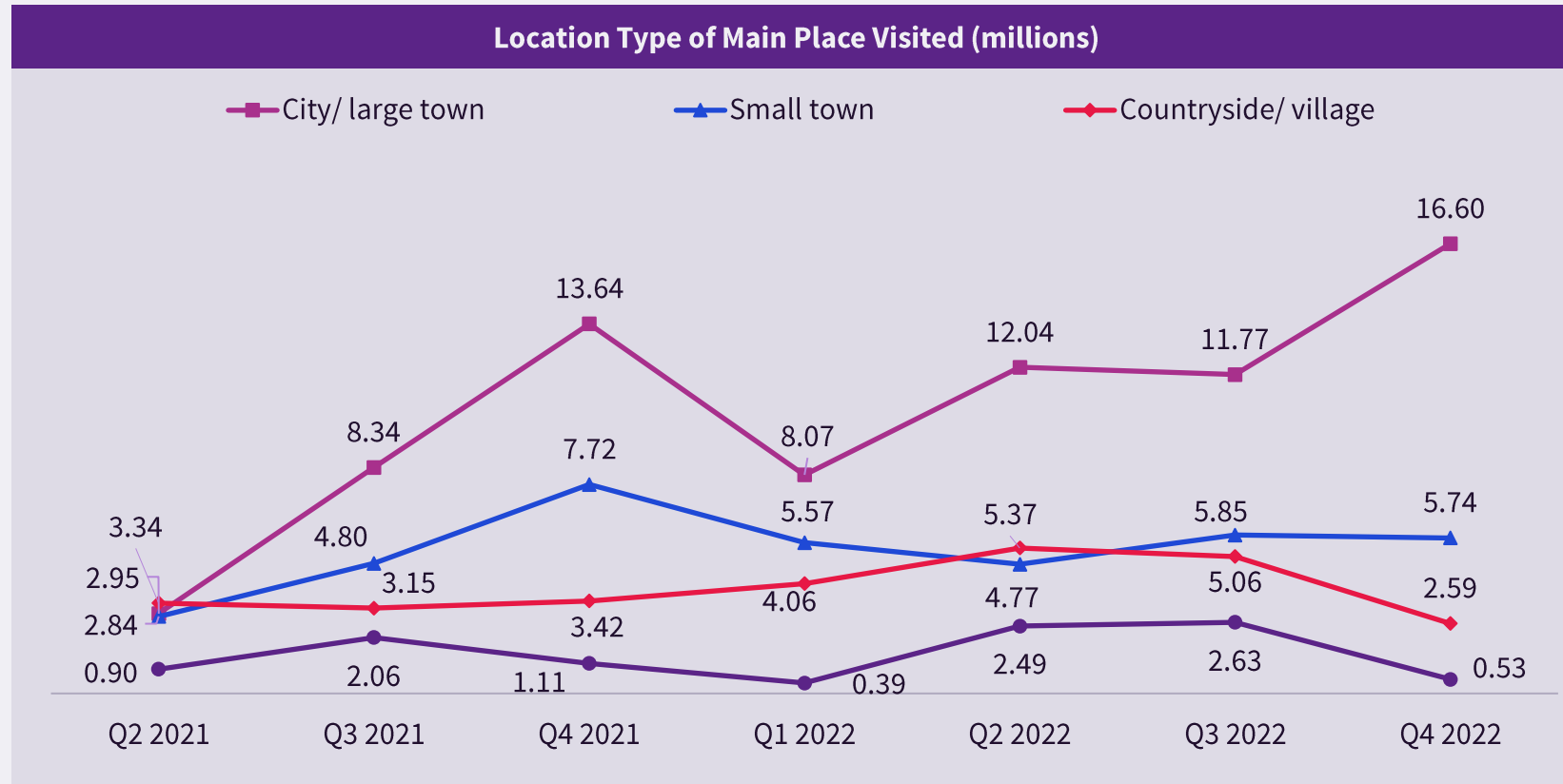


## £3,937m



# Location type of main place visited

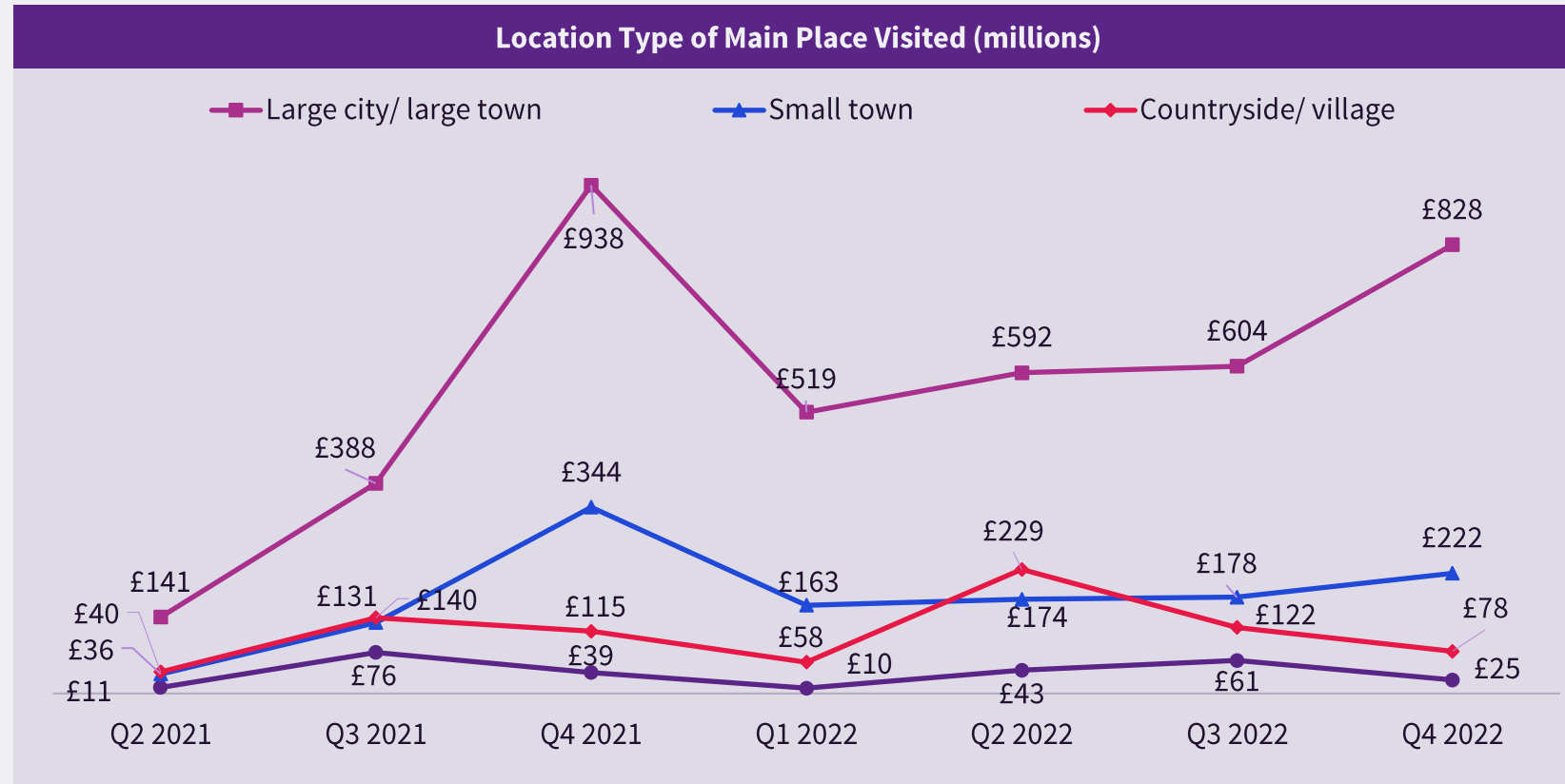
Half of visits to Scotland in 2022 were to cities and large towns, with an 8 percentage point increase in 2022 (April to December) in the proportion of these visits, when compared to 2021 (April to December). This marks a similar trend to overnight trips. Small towns, on the other hand, experienced a 6-percentage point drop in tourism day visits. This change in visit location type is most pronounced in Q4. Seaside and coastal areas and the countryside have different seasonal peaks to cities, large towns and small towns, this might explain why small towns are most impacted by the trend towards city visits.



Location Type	Visits 2022 (millions)	Proportion of visits
Seaside or other coastal	6.04	6%
City/large town	48.48	51%
Small town	21.94	23%
Countryside/village	17.08	18%
Other/Unspecified	1.29	1%

# Spend by location type of main place visited 2022

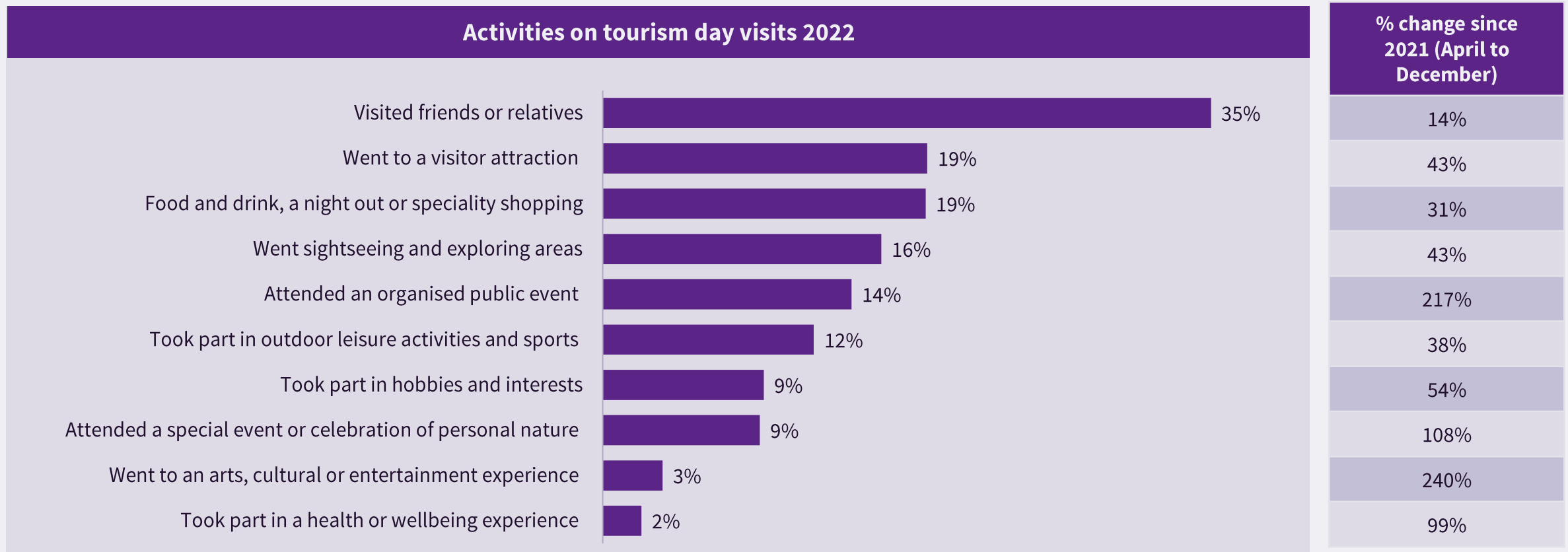
There was a 31% increase in spend in 2022 (April to December) when compared to 2021 (April to December). Cities and large towns are high-spend location types, representing half of visits to Scotland in 2022, but 65% of spend. There was a three-percentage point decrease in the proportion of spend in small towns in 2022 (April to December), when compared to 2021 (April to December).



Location Type	Spend 2022 (millions)	Proportion of Spend
Seaside or other coastal	£139	4%
City/ large town	£2,543	65%
Small town	£738	19%
Countryside/ village	£486	12%
Other/ Unspecified	£32	1%

# Activities undertaken on tourism day visits 2022

1 in 3 tourism day visits included a visit to friends and family, similar to 2021. The activities that experienced the most significant increases in 2022 were attending an organised public event, attending a personal celebration and going to a cultural experience. This is due to the slow return of the events sector in 2021, following COVID-19 restrictions, and the ongoing requirement to show COVID-19 vaccination or test status at venues and events.



# Spend on tourism day visits by activity 2022

Visits that included food and drink, night out or specialty shopping represented 1 in 5 visits, but accounted for 35% of visit spend in Scotland. The proportion of spend on visits that included seeing friends and family increased in 2022 (April to December), when compared to 2021 (April to December).

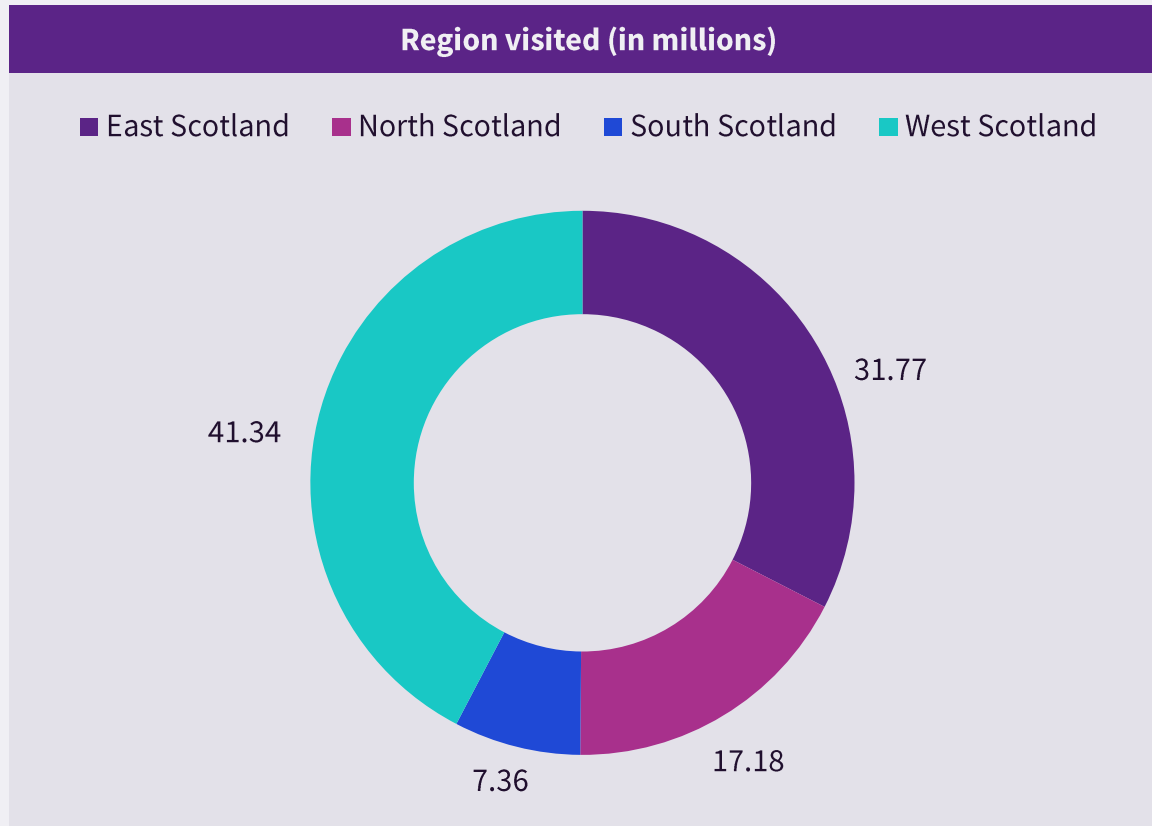




# Scotland profile of visits

# Visits and spend by region visited 2022

East and West Scotland received the most visits in 2022, representing 8 out of 10 tourism day visits to Scotland. Although South Scotland received the smallest proportion of visits, it experienced a 3-percentage point increase in visits when compared to 2021.

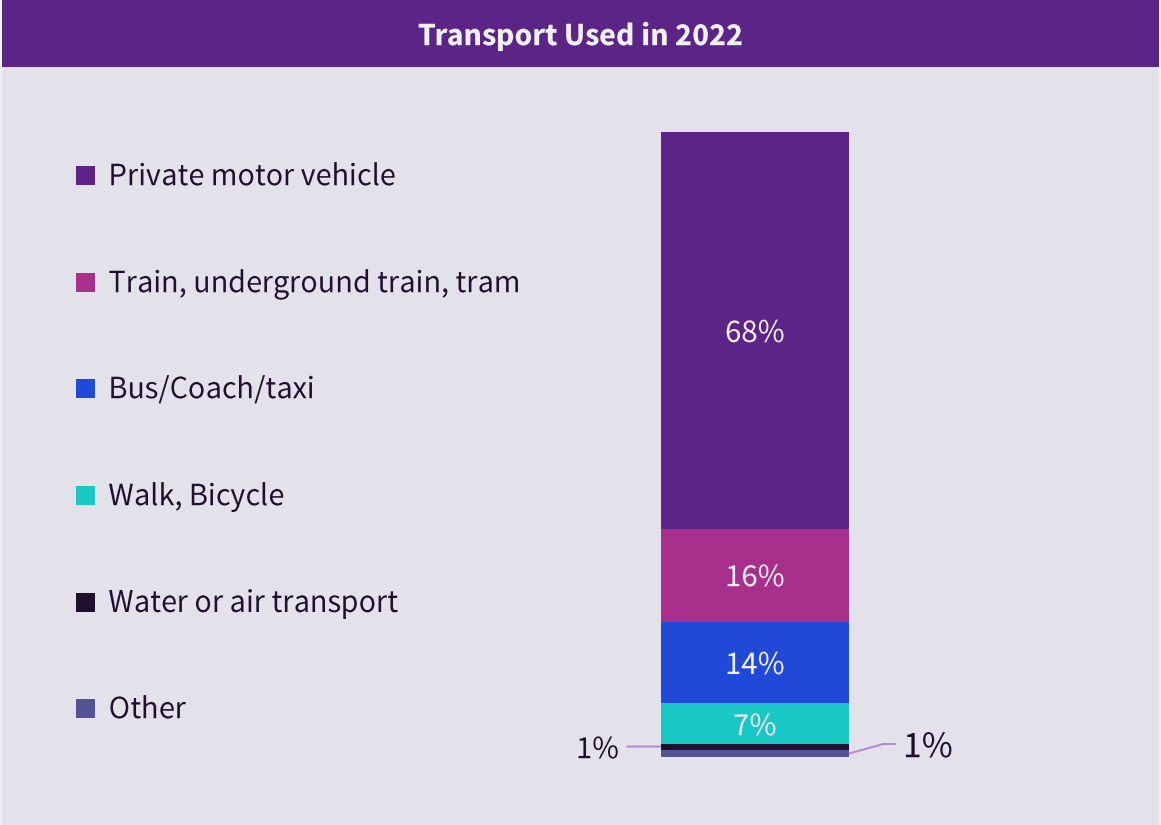


Region	Proportion of Visits 2022	Proportion of Spend 2022
East Scotland	34%	37%
North Scotland	18%	18%
South Scotland	8%	4%
West Scotland	44%	41%

# Transport used 2022

Private motor vehicles were used for the majority of tourism day visits in 2022. Although there was no change in the proportion of visits that used a car since 2021, visits by car owners increased by 5 percentage points. There was a 10 percentage point decrease in the proportion of visits that used a train, underground or tram. This decline was most evident in Q4 2022, where there was a 17 percentage point decrease in the use of trains, in comparison to Q4 2021. This is due to the train strikes in this period. As visits were taken closer to home in 2022, there was a 2 percentage point increase in walking and cycling.

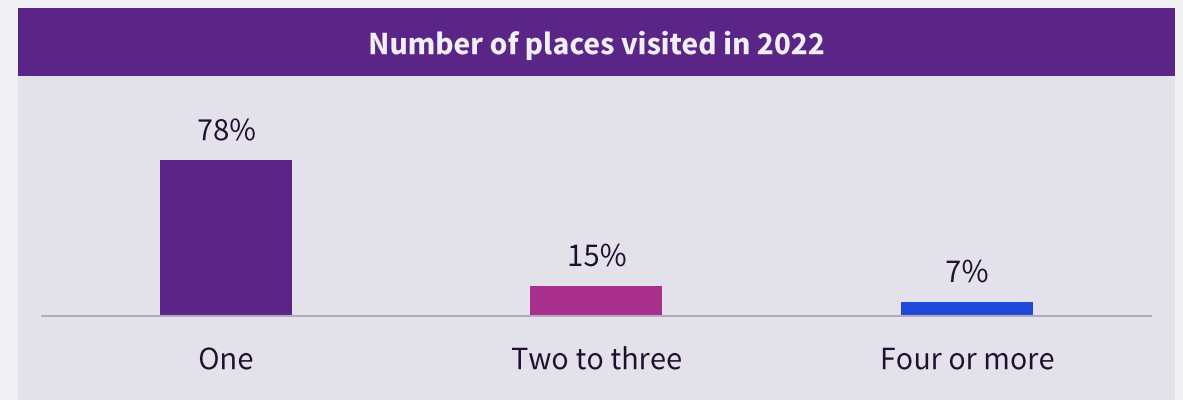
Please note that all comparisons made above are for the same time period (April to December) in 2021 and 2022.



# Distance travelled and number of places visited 2022

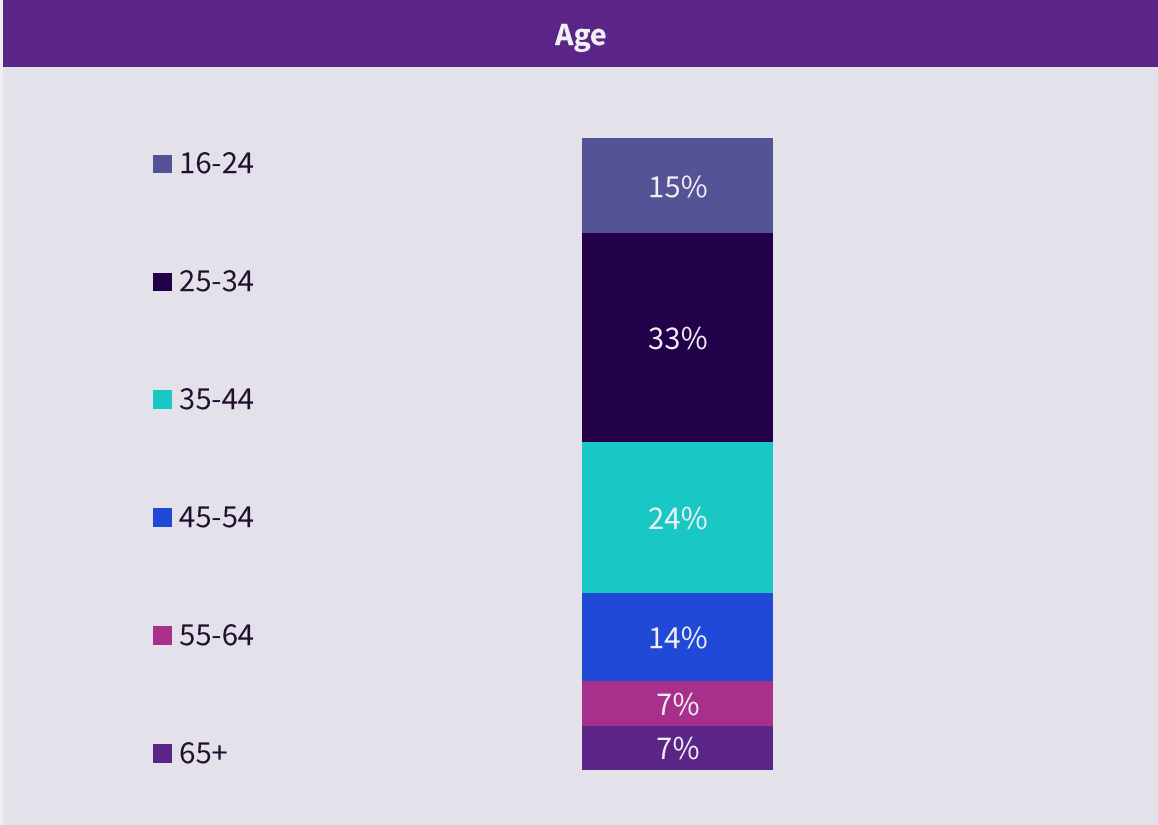
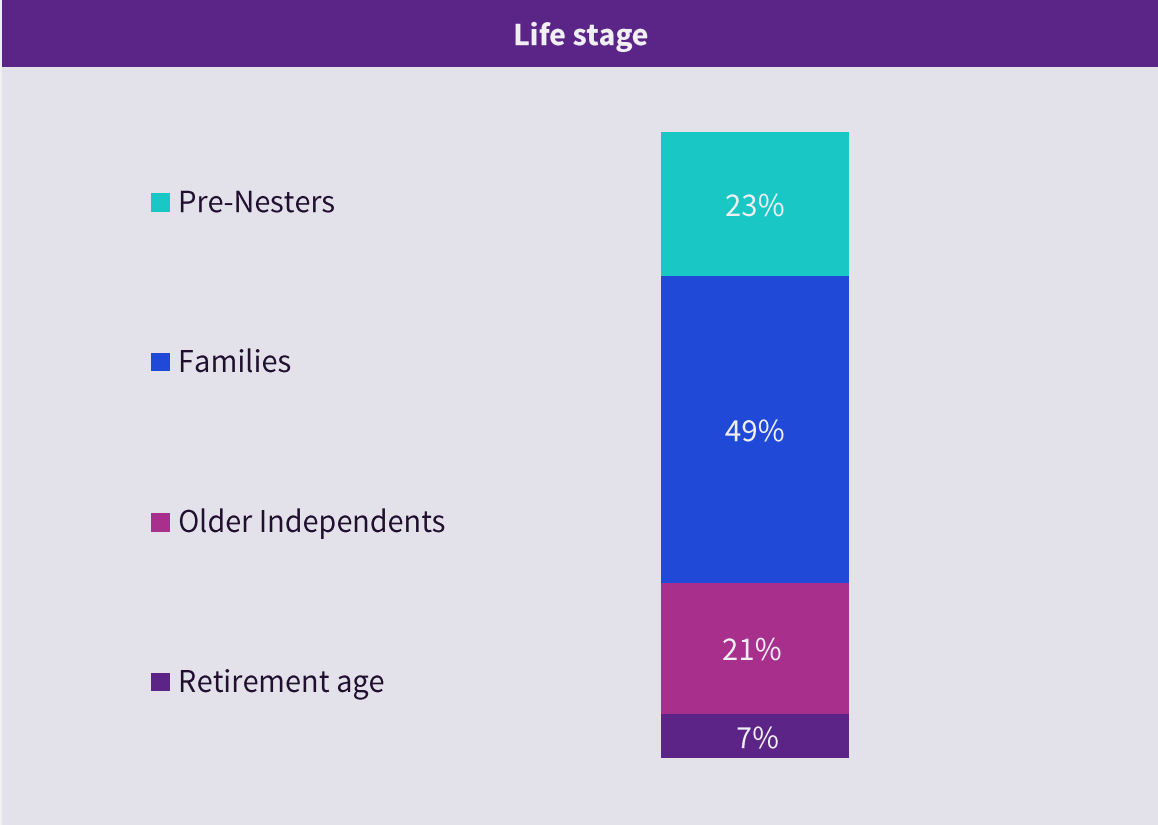
In 2022, there was an increase in the proportion of tourism day visits that involved travelling less than 5 miles, visiting just one place and lasting less than 5 hours. There was a similar trend of shorter stays and visiting just one place for overnight trips, which could be attributed to the rising cost-of-living or the return of international travel.

Please note that all comparisons made above are for the same time period (April to December) in 2021 and 2022.



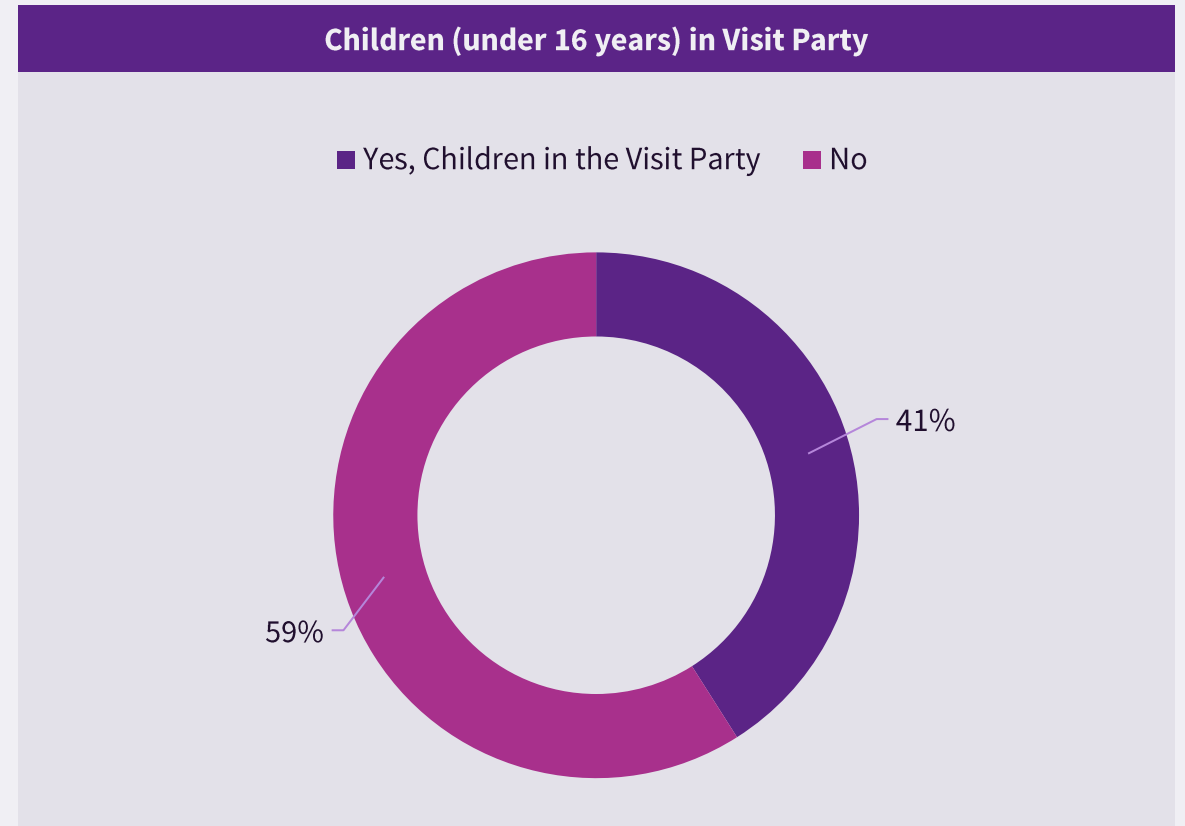
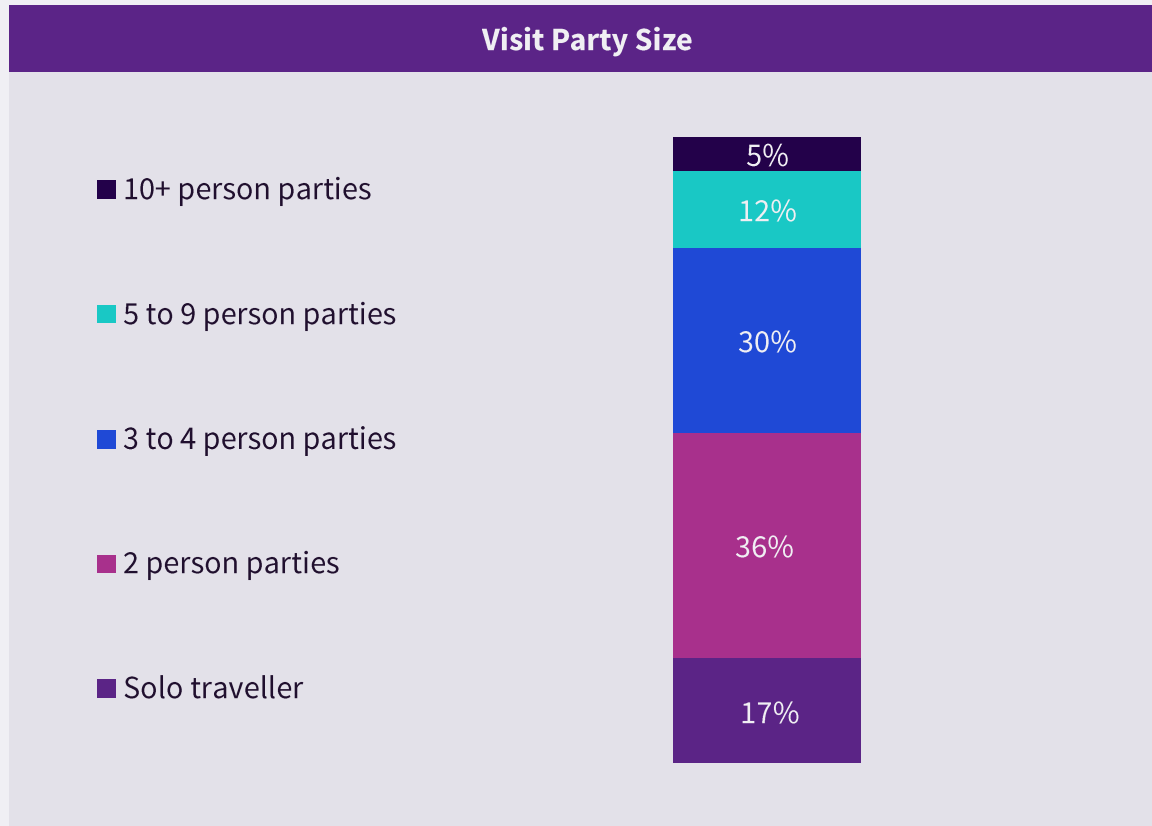
# Lifestage and age profile for domestic visits 2022

The highest proportion of visits in 2022 were made by those in the family lifestage at 49%, however, this group have the lowest average spend at just £36. In comparison, visits with under 34 year olds represent 48% of visits and have the highest average spend (£46). When compared to April to December 2021, there was an increase in the proportion of visits with 25 to 34 year olds, but a drop of for visits with 16 to 24 year olds. This drop appears to be related to the decrease in visits of larger groups, particularly with a team or social club.



# Visit party size 2022

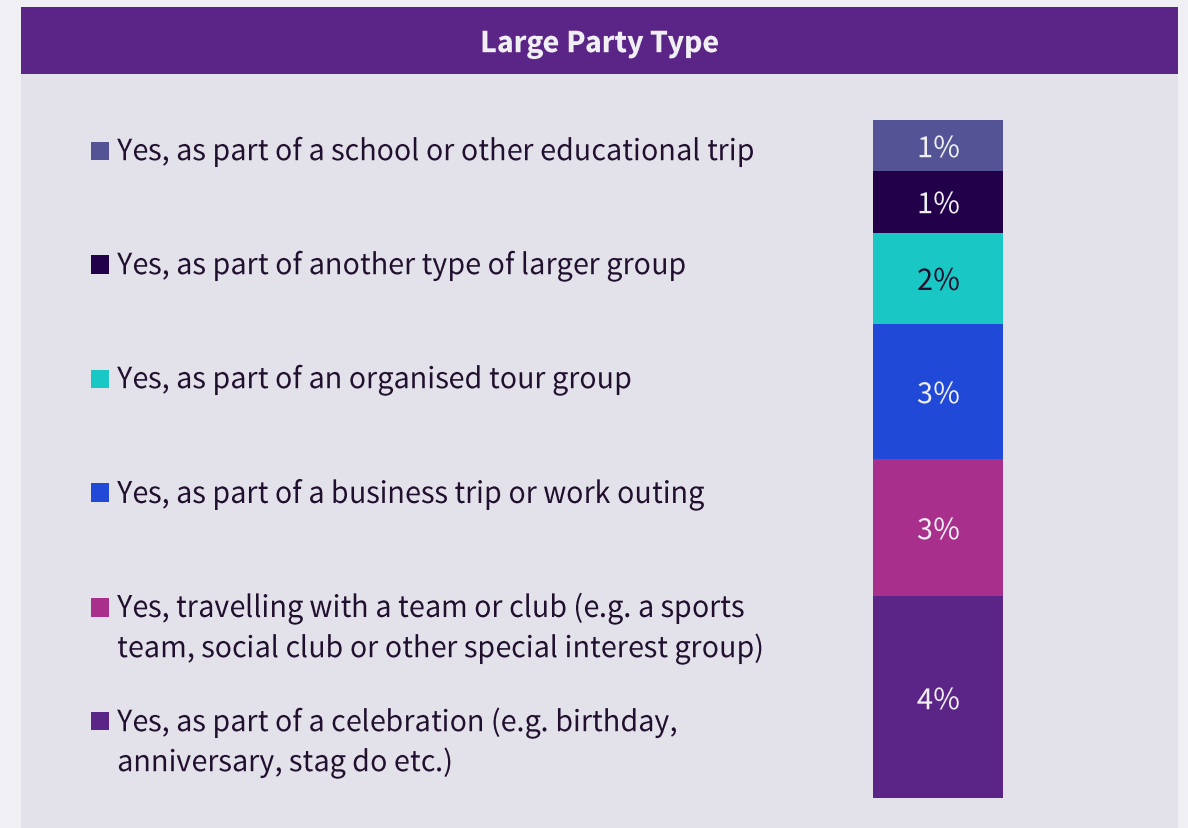
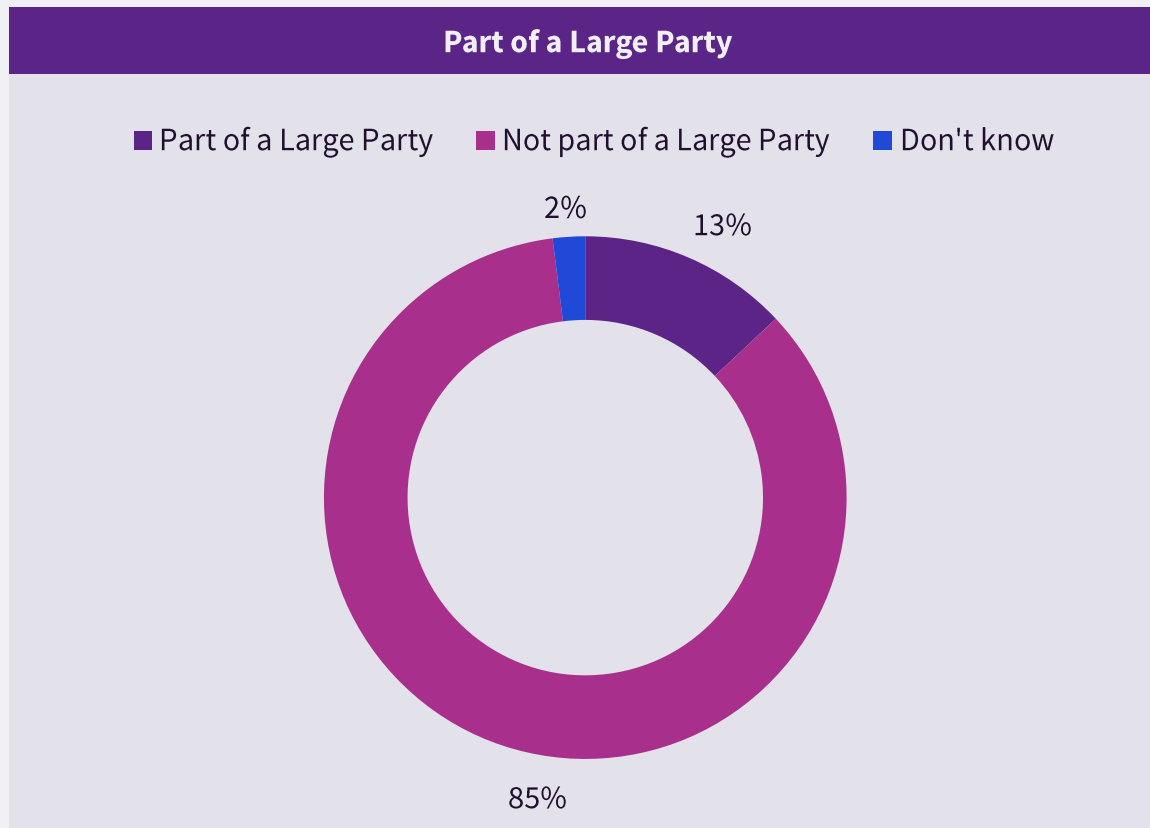
In contrast to overnight trips, party size for tourism days visits increased in 2022. There was an increase in the proportion of parties with 5+ people and an increase in the proportion of children on the visit, when compared to 2021 (April to December).



# Visit party composition 2022

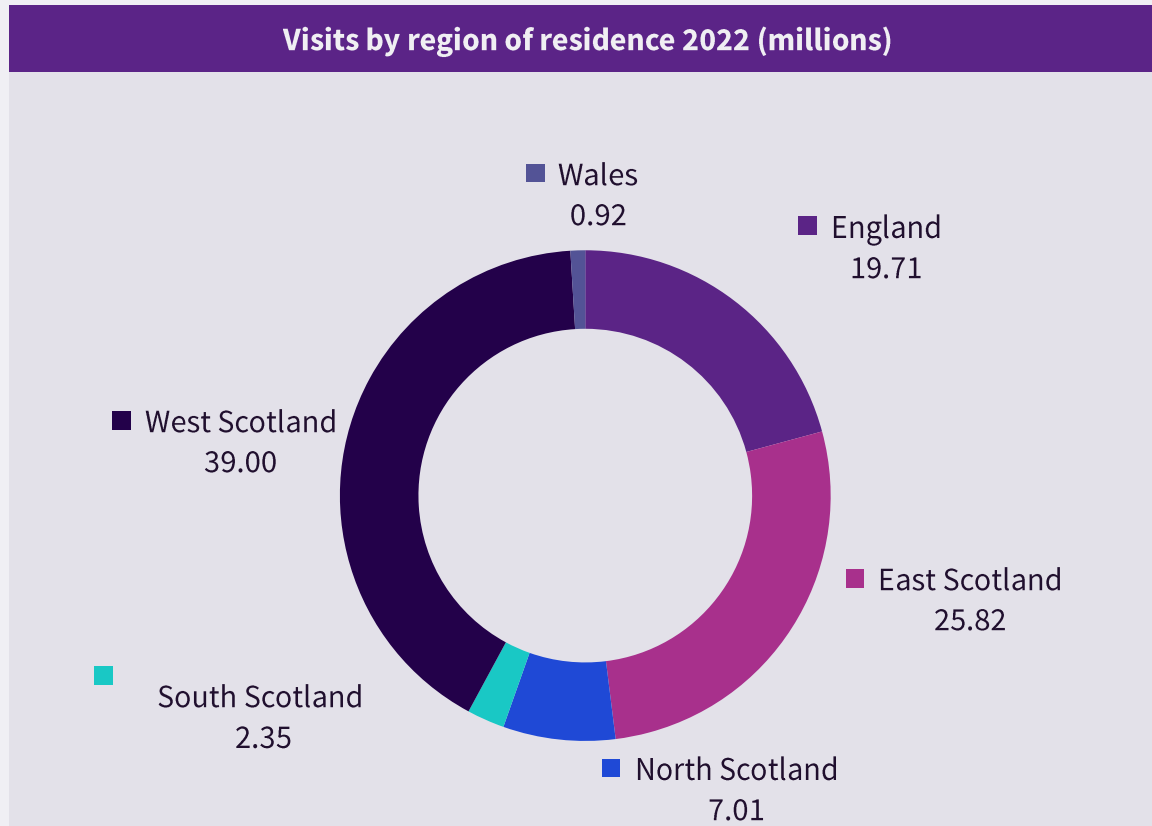
Less than 1 in 6 visits were part of a larger group (e.g. a coach party, tour group, school trip) in 2022, which is a decrease of when compared to 2021. Celebrations were the most popular type of large group in 2022. In contrast to overnight trips, average spend for day visits with a large group (£29) is smaller than those not with a large group (£44).

Please note that all comparisons made above are for the same time period (April to December) in 2021 and 2022.



# Visits and spend by region of residence 2022

1 in 4 tourism day visits to Scotland were by England residents. The highest proportion of spend on visits to Scotland were made by West Scotland residents. Wales residents accounted for just 0.5% of spend on tourism day visits to Scotland. Visits from East Scotland increased by 3 percentage points in 2022 (April to December), when compared to 2021 (April to December), and had a higher average spend than visits from other regions.



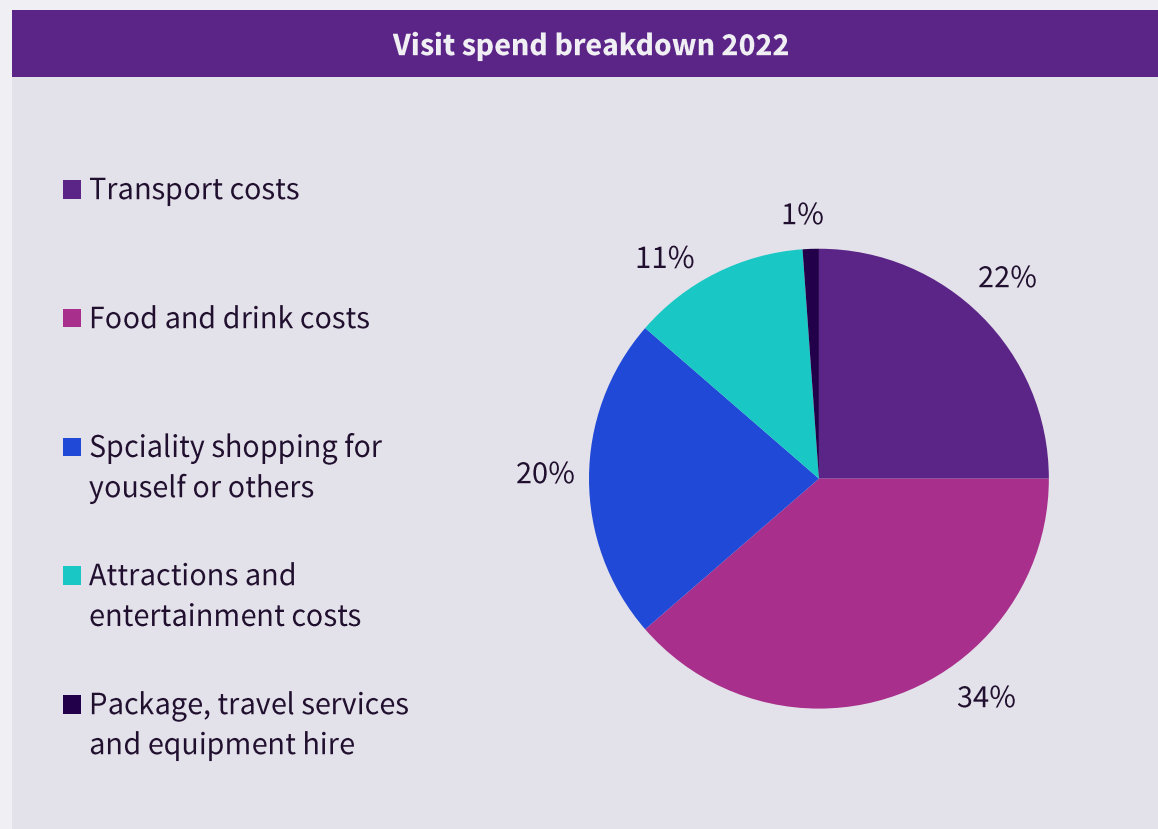
Region	Proportion of Visits	Proportion of Spend
East Scotland	27%	30%
North Scotland	7%	7%
South Scotland	2%	3%
West Scotland	41%	39%
England	21%	21%
Wales	1%	0.5%



# Day visit spend breakdown 2022

In 2022, the proportion of spend on transport declined when compared with 2021. This decrease was most pronounced for rail, tube or tram transport, particularly in Q4 due to rail strikes. There was a slight drop in the proportion of spend on eating out, which was replaced by eating in.

Please note that all comparisons made above are for the same time period (April to December) in 2021 and 2022.



Detailed spend breakdown. (Excludes categories with base sizes of 100 or less)	Proportion of Spend
<b>Net: Transport costs</b>	22%
Road transport – bus fares, taxi fares, car parking	5%
Road transport – all fuel bought during your trip (i.e. not before the trip)	12%
Rail, tube or tram transport (e.g. tickets)	4%
<b>Net: Food and drink costs</b>	34%
Eating and drinking out (e.g. cafes, restaurants, bars)	25%
Food/drink bought in a shop, market stall or takeaway and consumed during the trip (not routine grocery shopping)	9%
<b>Specialty shopping for yourself or for others</b>	20%
<b>Net: Attractions and entertainment costs</b>	11%
Entrance to visitor attractions (including museums, galleries, historic monuments)	4%
Tickets/entrance to events, shows, clubs etc. (e.g. theatre, cinema, nightclubs)	6%

# Average spend on tourism day visits

Average spend on the majority of tourism day visits was £40 or less. 1 in 6 spent nothing at all, these day visits were mostly to see friends and relatives. However, 11% did have an average spend of more than £100 per visit. These visits were more likely to be to cities and large towns, made up of 24-35 years olds and taking part in activities such as food, drink, a night out or speciality shopping.

Average spend on tourism day visits 2022 (including zero spend)



# GREAT BRITAIN DAY VISITS SURVEY ANNUAL DATA TABLES

Results from the Great Britain Day Visits Survey (2022) are available as data tables (Excel format).

For access to the 2022 annual data tables, please contact [research@visitscotland.com](mailto:research@visitscotland.com)