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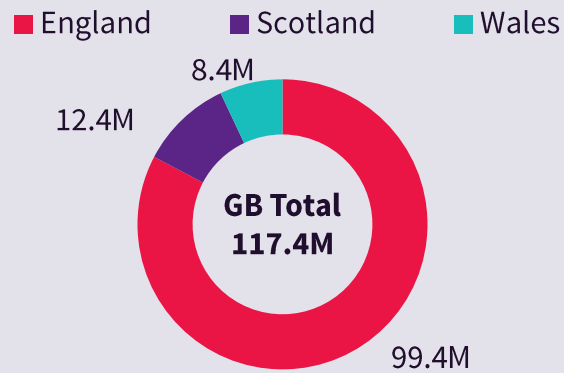
**Great Britain Tourism Survey (GBTS)
Annual Report 2023**

Scotland Great Britain Tourism Survey (GBTS)

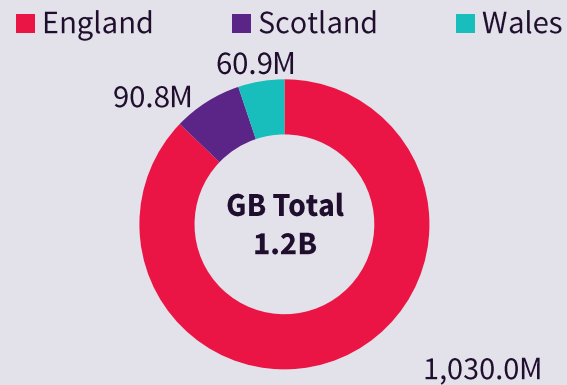
Annual Report 2023

Great Britain residents took 1.3 billion day and overnight trips in Great Britain in 2023. Spend for all domestic trips in Great Britain in 2023 was £83.2 billion.

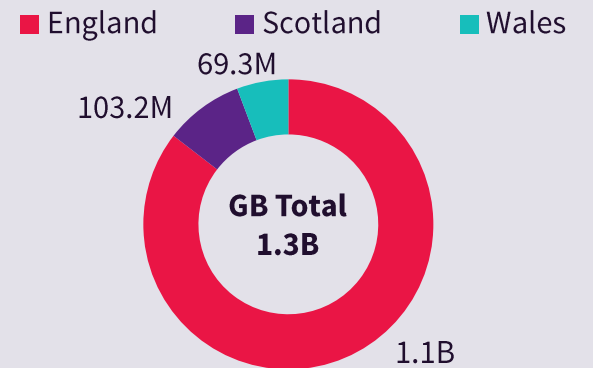
2023 Overnight Trips



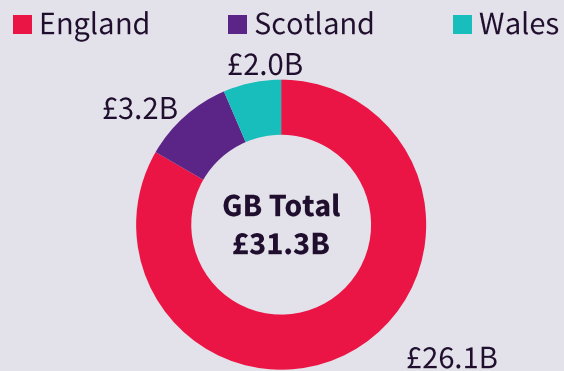
2023 Tourism Day Visits



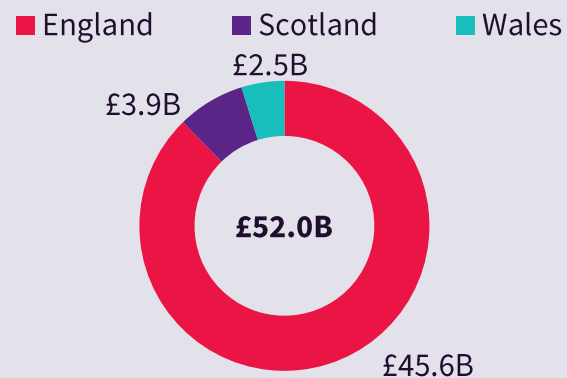
2023 Day Visits and Overnight Trips



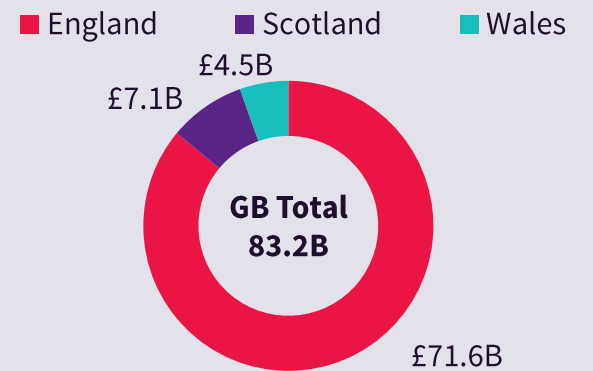
2023 Overnight Spend



2023 Day Visit Spend



2023 Day Spend and Overnight Spend



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Introduction

- The Great British Tourism Survey (GBTS) is a national consumer survey. It measures the volume and value of domestic overnight tourism by residents of Great Britain. This report focuses on the domestic tourism statistics for 2023 for Scotland. Throughout the report the tourism statistics for 2022 are used to highlight trends in trips, spend and bednights. Detailed results for England and Wales are published by [VisitEngland](#) and [Visit Wales](#) respectively.
- The statistics from 2022 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 provides information about trip and visitor characteristics, with comparisons where appropriate, and covers all tourism purposes, such as holidays, visits to friends and relatives and trips for business and other purposes. A methodological review was conducted in 2024, following which a number of methodological changes were implemented. Both the 2022 and 2023 data in this report reflect the new methodology, details of which can be found [here](#).
- 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 Day Visitor Survey (GBDVS), 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 GBTS is 60,000 respondents. These numbers include respondents who have not taken any qualifying trips. The annual samples are split evenly across the 52 weeks of the year.
- Since 2020 GBTS 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 overnight trips taken by adults aged 16+ in England, Scotland and Wales. The survey also collects details of any children involved with overnight trips, and these are included in the estimated grossed-up figures for trips, spend and number of nights.
- A number of changes were made to the questionnaire in May 2022, the pre-May 2022 data has been calibrated to account for these changes.
- The GBTS 2022 and 2023 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 trip taking 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 trips, rather than the number of respondents. Quarterly targets are utilised for Scotland and Wales due to small monthly base sizes.
- Number of trips for 2023 estimations are based upon:

Nation	Unweighted Base Sizes 2023
GB	9,245
England	7,279
Scotland	1,265
Wales	914

- Low base sizes are flagged throughout the report. For base size between 30 and 100, it is recommended to only use the estimates as indicative. Statistics with base sizes under 30 have been excluded in many cases as it is not recommended to use these. In some instances, the overall base size is above 30 (business trips), but the quarterly or other sub-category is below 30 and therefore excluded.
- 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



Great Britain Domestic Overnight Trip

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

- Involved a stay of at least one night in one or more of the GB nations
- Trip is not taken on a frequent basis – takes place less often than once a week

Key Measures

- **Trips** - An estimate of what the grossed-up number of overnight trips undertaken by the population, within the time period and other parameters specified, would be if the quota sample is representative of the whole GB population.
- **Spend** - Is an estimate of what the total expenditure relating to the volume of overnight visits undertaken by the GB population, within the time frame and other parameters specified, would be if the quota sample is representative of the whole GB population.
- **Nights** - An estimate of what the grossed-up number of nights spent on overnight trips undertaken by the population, within the time period and other parameters specified, would be if the quota sample is representative of the whole GB population



Journey Purpose

- **Total trips.** This includes estimates of trips, nights and spend on all overnight trip types for all eligible purposes.
- **Holiday trips.** The main purpose of the trip was for holiday, pleasure or leisure.
- **Visiting friends or relatives (VFR).** The main purpose of the trip was for visiting friends and relatives.
- **Business trips** – The main purpose of the trip was for business.
- **Miscellaneous trips** – The main purpose of the trip was for another type of trip taken not covered by the above classifications including personal events, public events, or for study, medical, religious purposes or any overnight stay in the UK as part of an overseas trip.

Context

- **Cost-of-Living:** UK inflation, as measured by the [Consumer Prices Index \(CPI\)](#), was 4% in the 12 months to December 2023, down from a peak of 11.1% in October 2022. However, the start of 2023 still had a high CPI of 10.1%, which slowly reduced as the year progressed.
- **International travel:** According to the [ONS](#), UK residents made 86.2 million visits abroad in 2023; this compares with total visits of 71.0 million in 2022. UK residents spent £72.4 billion on visits abroad in 2023; this was £13.9 billion more than in 2022.
- **Industrial actions:** Ongoing industrial action throughout 2023 undoubtedly had an impact on travel. For example, around 1 in 10 people (11%) surveyed in the [Opinions and Lifestyle Survey \(OPN\)](#) reported having their travel plans disrupted by rail strikes in late January/early February 2023. Among those who reported that rail strikes had disrupted their travel plans, almost half (45%) said this disruption affected their ability to take part in leisure activities.
- **Weather:** The [MET](#) office reported that 2023 was one of the warmest years on record for the UK, and was also relatively wetter than average. Eight of the 12 months of the year were warmer than average, and the warmest periods were in June and September, with the high summer months of July and August generally cooler and wetter. 2023 was relatively wet with 1,290mm of rainfall, making it the UK's 11th wettest year in a series going back to 1836. 2023-24 saw the most active start to the storm season since naming storms began in 2015.
- **COVID-19:** While COVID-19 was unlikely to have an impact on 2023 tourism, the after-effects were still being felt throughout 2022, resulting in a particularly strong Q4 2022. This is important to note when assessing quarterly year-on-year comparisons.

Summary

Summary of findings (1/2)

Great Britain

- There were 117.4 million domestic overnight trips in Great Britain in 2023. This represents a 5% decrease, when comparing to 2022. While domestic spend on trips dropped by 2% to £31.3 billion, the average spend per trip in Great Britain rose from £259 in 2022, to £266 in 2023. Nights spent on trips in 2023 reduced by 9%, when compared to 2022. This may be in response to inflation, whereby people reduced their domestic trip length rather than forego the trip altogether.
- Domestic day visits to Great Britain in 2023 increased quarter on quarter when compared to 2022, with often inverse trends to overnight stays, suggesting that there may be some substitution of day for overnight domestic trips. Overall, there was a 22% increase in holiday trips taken outside the UK by GB residents in 2023, when compared to 2022, which could indicate that when purses were tight, international holidays were replacing domestic holidays to some degree.

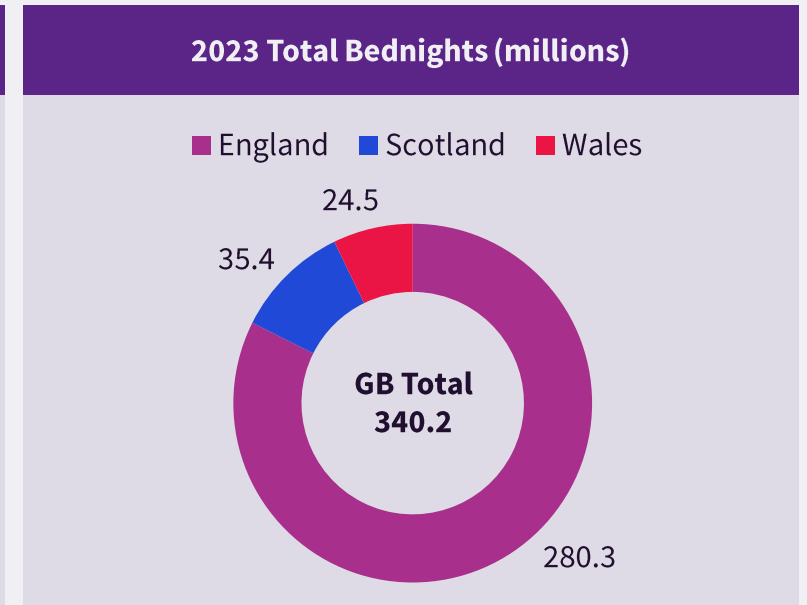
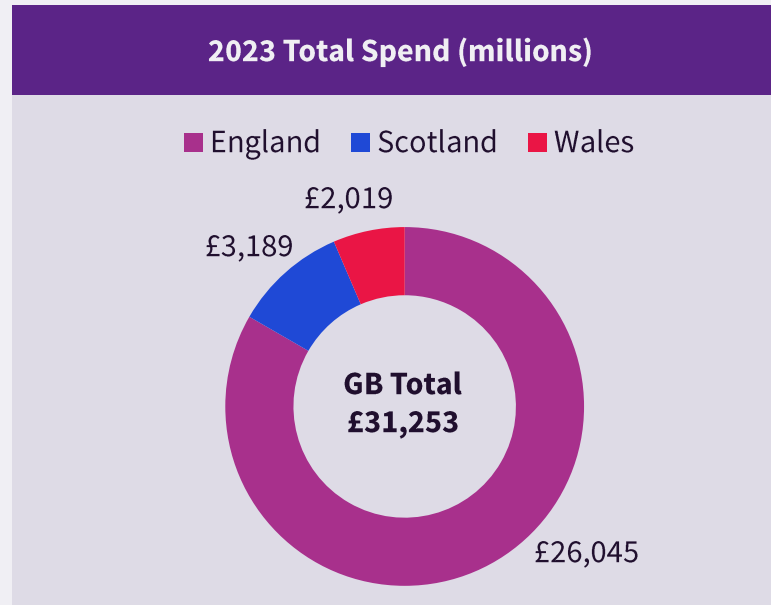
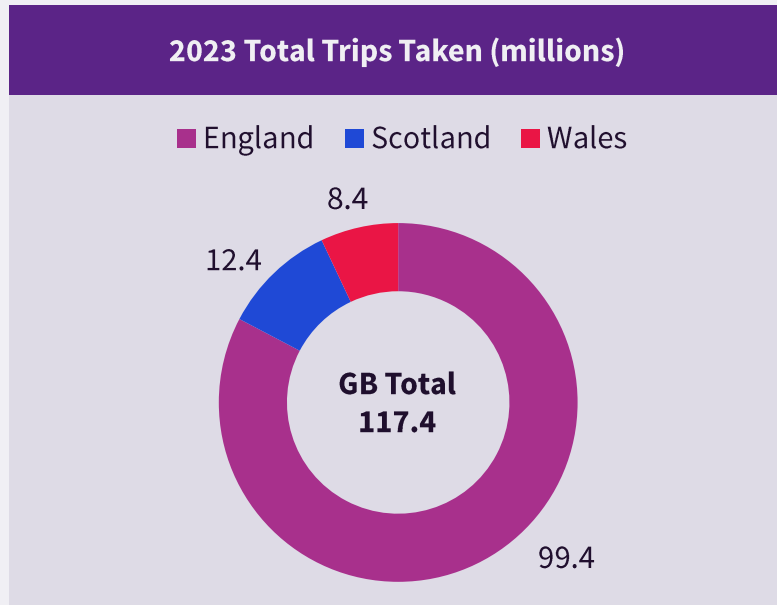
Scotland

- There were 12.4 million trips in Scotland, most of which were for visiting friends and relatives or holidays. While the proportion of miscellaneous trips overall hasn't increased significantly, there was a 5 percentage point increase in Q3 2023 vs. Q3 2022, as more people are travelling internationally (miscellaneous trips include domestic trips as part of an overseas trip).
- All trip types in 2023 experienced an increase in average spend per trip, when compared to 2022. Average spend on holiday trips in Scotland increased by 9%, which is a greater increase than all other trip types. Average spend in England and Wales also increased, which suggests it may be due to inflation.
- The majority of trips in Scotland in 2022 lasted 3 nights or less, this was particularly the case for visiting friends and relatives and miscellaneous trips. The duration of trips in Scotland remained static in 2023, when compared to 2022. Spend per night was significantly higher on shorter trips, ranging from £123 for trips lasting 1-3 nights, to £78 for trips of 4-7 nights and just £37 per night for those of 8 nights or more.

Summary of findings (2/2)

- Cities and large towns proved to be the most popular destinations in 2023 in Scotland, followed by small towns and the countryside. There was a 4 percentage point increase in the proportion of trips in small towns, a trend also seen in England. Seaside/coastal areas experienced a 5 percentage point increase in holiday trips, suggesting there is a return to the Scottish seaside.
- Although down in real terms (from 7.3m in 2022 to 7.1m in 2023), there was a 3 percentage point increase in the proportion of trips in Scotland by Scotland residents (55% to 58%). In 2023, East Scotland was the region with the most trips and spend, although only marginally higher than West Scotland. For holiday trips, the proportion of trips in East Scotland increased by 3 percentage points when compared to 2022.
- ‘Sightseeing’, ‘food and drink, a night out and speciality shopping’ were the most popular trip activities in Scotland in 2023. There was a 4 percentage point increase in the proportion of trips where food, drink and speciality shopping took place and a 6 percentage point increase in spend.
- Trip spend in Scotland decreased by 4% in 2023, mostly due to a 19% drop in spend on package holidays. There was minimal change in the proportion of spend on each category in 2023, the majority of trip spend still goes to accommodation, package holidays and eating and drinking.
- 6 in 10 trips in Scotland booked accommodation in advance in 2023, but just 3 in 10 trips were booked more than two months in advance. While this is unchanged since 2022, there was a 5 percentage point decrease during the peak summer season.
- Travel websites and accommodation providers were the most popular means of accommodation booking for a holiday to Scotland in 2023, there was a 3 percentage point increase in holiday trip bookings through accommodation sharing websites.
- Serviced accommodation was the most common type of accommodation used on overnight trips in Scotland, followed by staying in someone’s private home, which increased by 3 percentage points when compared to 2022. This increase is mainly due to a 9 percentage point increase in younger independents choosing this accommodation type.
- Trips in Scotland by younger independents increased by 5 percentage points in 2023 and have a comparatively younger age profile than trips in Great Britain more generally, with 56% of trips made by under 35 year olds versus 44% to Great Britain. In 2023, there was a 4 percentage point increase in trips taken by 16-34 year olds in Scotland.
- 1 in 5 trips were part of a larger group in 2023, with a 9 percentage point increase in large group trips in Q3 2023 vs Q3 2022. Trips with larger groups have a higher average spend per trip than those not part of a larger group (£278 versus £254) but lower average duration (2.3 days vs 3.0 days).

2023 GB overnight tourism statistics at a glance



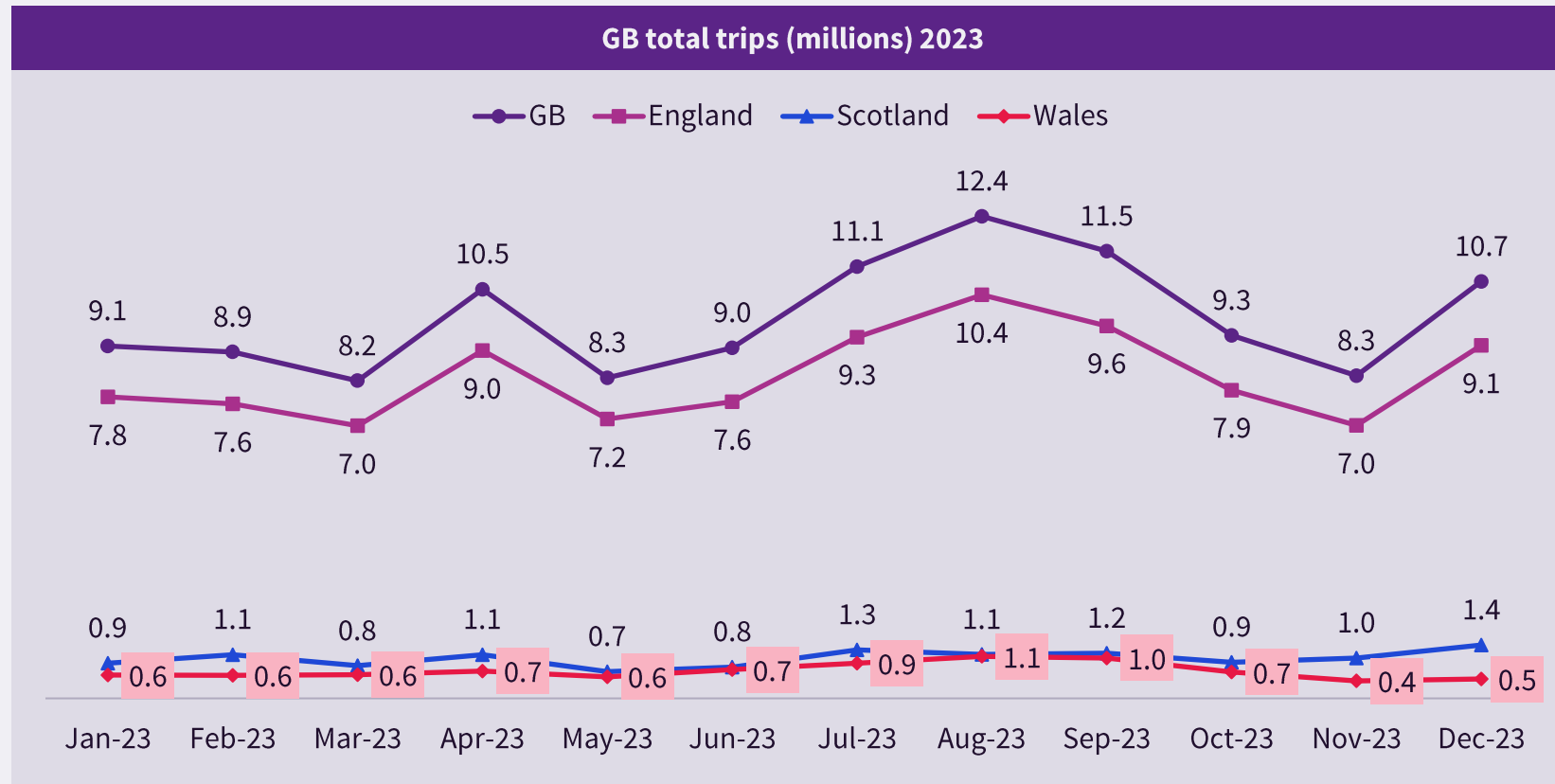
Nation	Average Spend per Trip 2023
GB	£266
England	£262
Scotland	£258
Wales	£239

Nation	Average Spend per Night 2023
GB	£92
England	£93
Scotland	£90
Wales	£82

Nation	Average Nights per Trip 2023
GB	2.9
England	2.8
Scotland	2.9
Wales	2.9

Domestic overnight trips by month in 2023

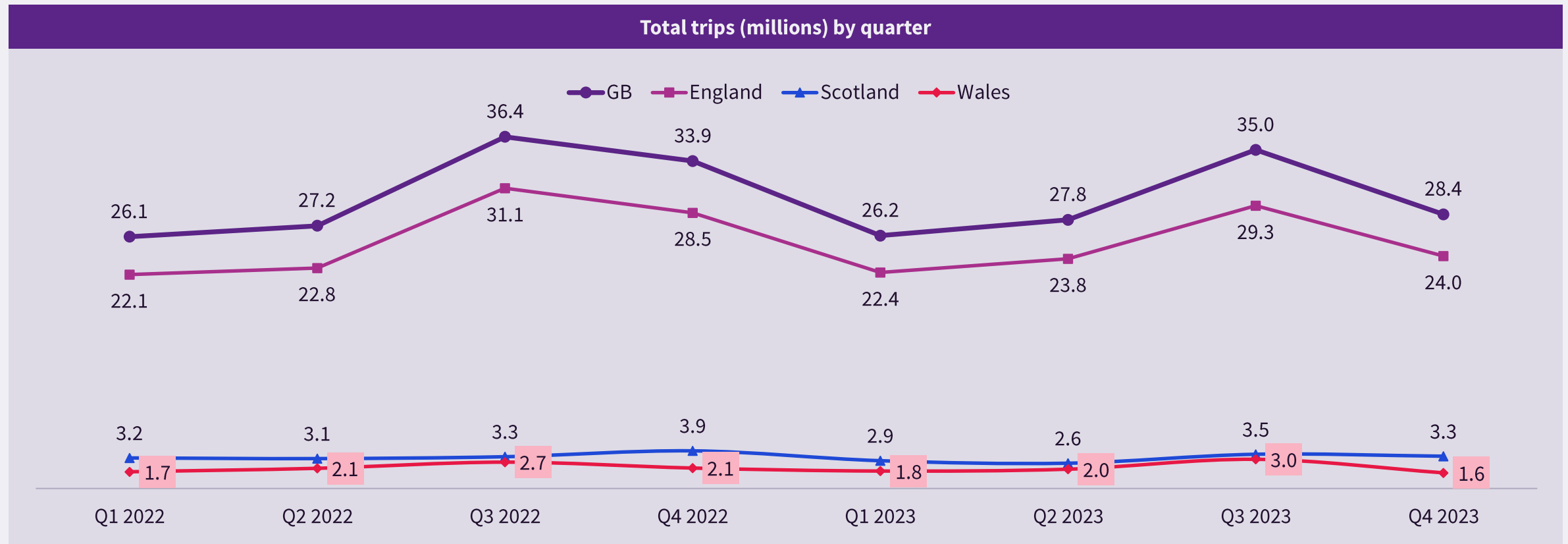
Domestic overnight trips in Great Britain peaked in August 2023, with 12.4 million trips taken. This surge was largely driven by holiday trips, which accounted for 41% of all trips in August compared to 32% for the year overall. The Easter period in April 2023 was particularly popular among families, while December 2023 saw a peak due to visits to friends and family during the holidays (45% in December vs. 37% for the year overall).



Nation	Number of trips 2023 (millions)	Proportion of trips 2023
GB	117.4	
England	99.4	85%
Scotland	12.4	11%
Wales	8.4	7%

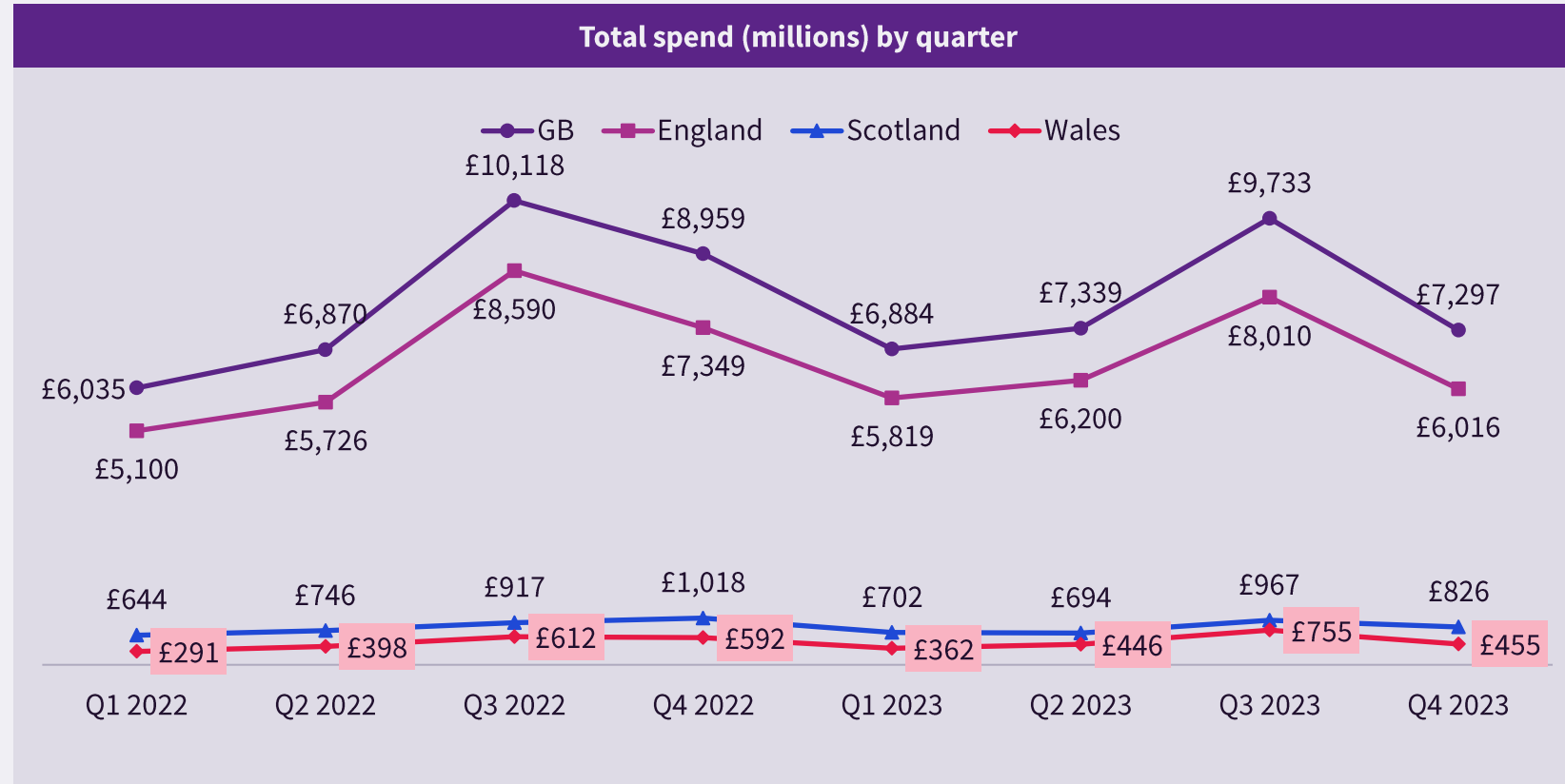
Domestic overnight trips by quarter 2022-2023

In comparison to 2022, Q4 2023 experienced a drop in domestic overnight trips in Great Britain. However, Q4 2022 was particularly strong as the public embraced travel following the final removal of all COVID restrictions earlier in the year. While the Summer 2023 period saw a decrease in trips in England, there was a slight uplift in trips in Scotland (+8%) due to an increase in miscellaneous trips, and Wales (+10%). Due to the high demand in April 2023, trips in England in Q2 were marginally higher (4%) than in 2022.



Total trip spend by quarter 2022-2023

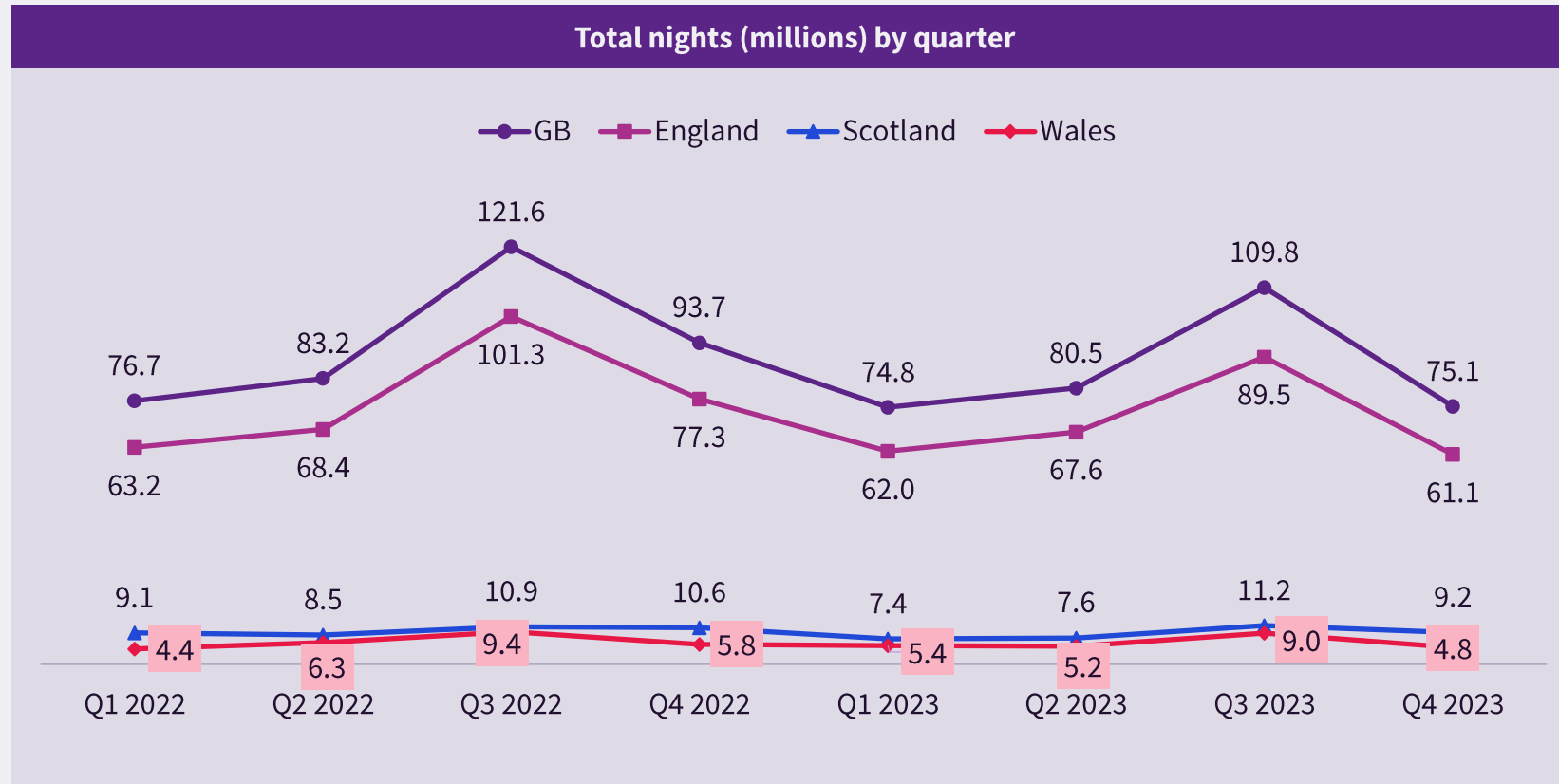
In line with trip volume, Q1 and Q2 spend on domestic trips in Great Britain and England in 2023 outperformed the same time period in 2022. Spend in Q3 2023 increased for Scotland (6%) and Wales (23%).



Nation	Total spend 2023 (millions)	Proportion of spend 2023
GB	£31,253	
England	£26,045	83%
Scotland	£3,189	10%
Wales	£2,019	6%

Nights spent on a trip by quarter 2022-2023

Nights spent on a domestic trip in Great Britain reduced by 9% in 2023, when compared to 2022. Nights spent in England are down across all quarters in 2023, however, there was an uplift in nights spent in Scotland in Q3 and Wales in Q1 2023. Sentiment Trackers commissioned by Visit Britain throughout 2023 indicated that circa 12%-13% (it changes month on month) of respondents would reduce the number of nights spent on a trip in response to the cost-of-living pressures.



Nation	Total nights 2023 (millions)	Proportion of nights 2023
GB	340.2	
England	280.3	82%
Scotland	35.4	10%
Wales	24.5	7%

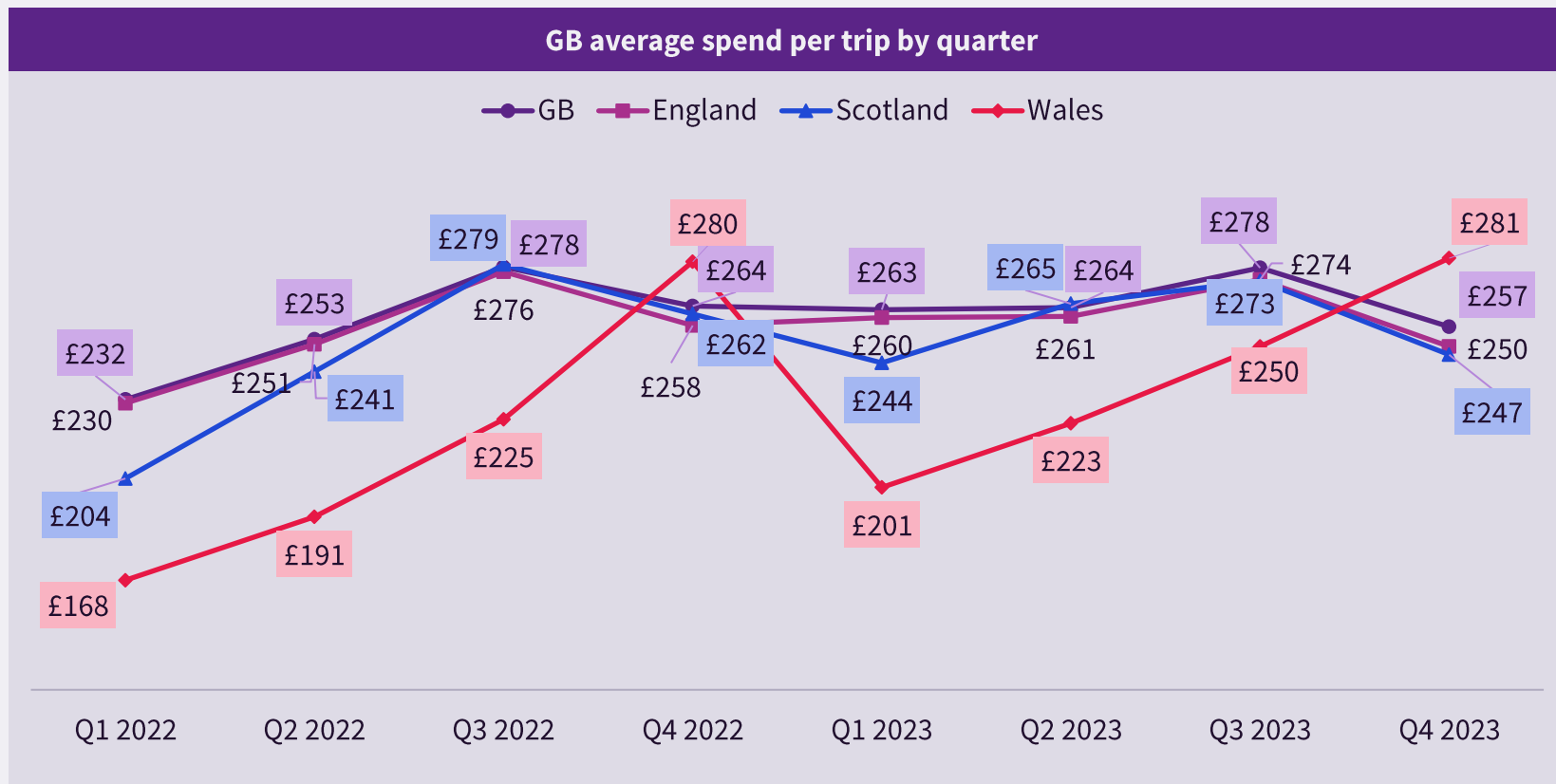
Nation of residence by nation of destination in 2023

Wales experienced the most cross-nation tourism with the majority of trips being taken by England residents. Although down in real terms (from 7.3m in 2022 to 7.1m in 2023), there was a 3 percentage point increase in the proportion of trips in Scotland by Scotland residents (55% to 58%). Similar to 2022, less than 1 in 10 trips in England were from residents of other British nations. Trips in other nations have a higher average spend than trips in the home nation. For example, the average spend for trips in Wales was £239, whereas trips made by Scottish residents in Wales had an average spend per trip of £391.



Average spend per trip 2022-2023

Average spend per trip increased across the board in 2023. The increase in average spend for Great Britain was 3%, below the annual rate of inflation in 2023, which according to the CPI was 4.0% (down from a high of 9.2% in 2022).

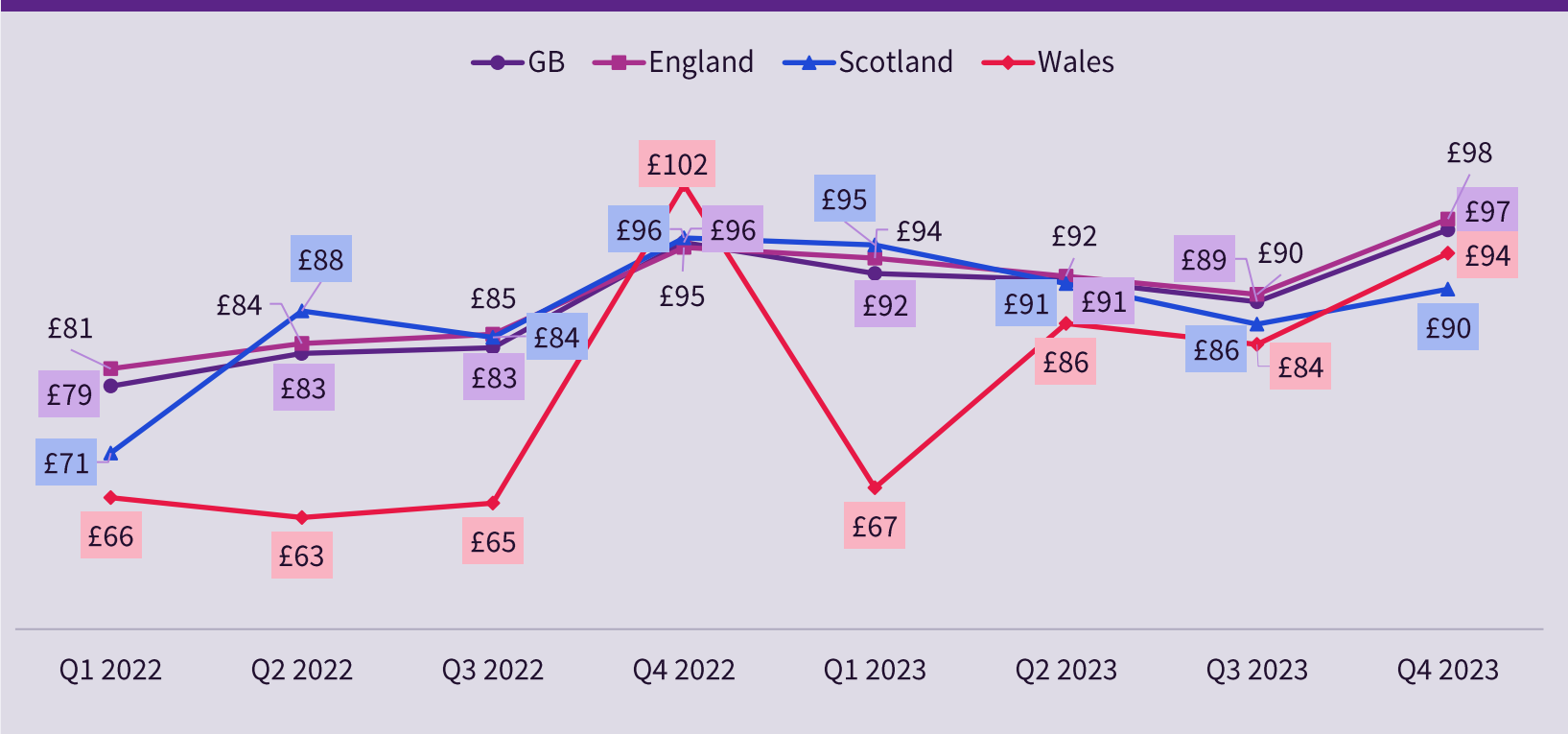


Nation	Average spend per trip 2022	Average spend per trip 2023
GB	£259	£266
England	£256	£262
Scotland	£248	£258
Wales	£219	£239

Average spend per night 2022-2023

As the number of nights per trip reduced and overall spend increased, the average spend per night also increased throughout 2023. At GB level, there was an 8% increase in average spend per night.

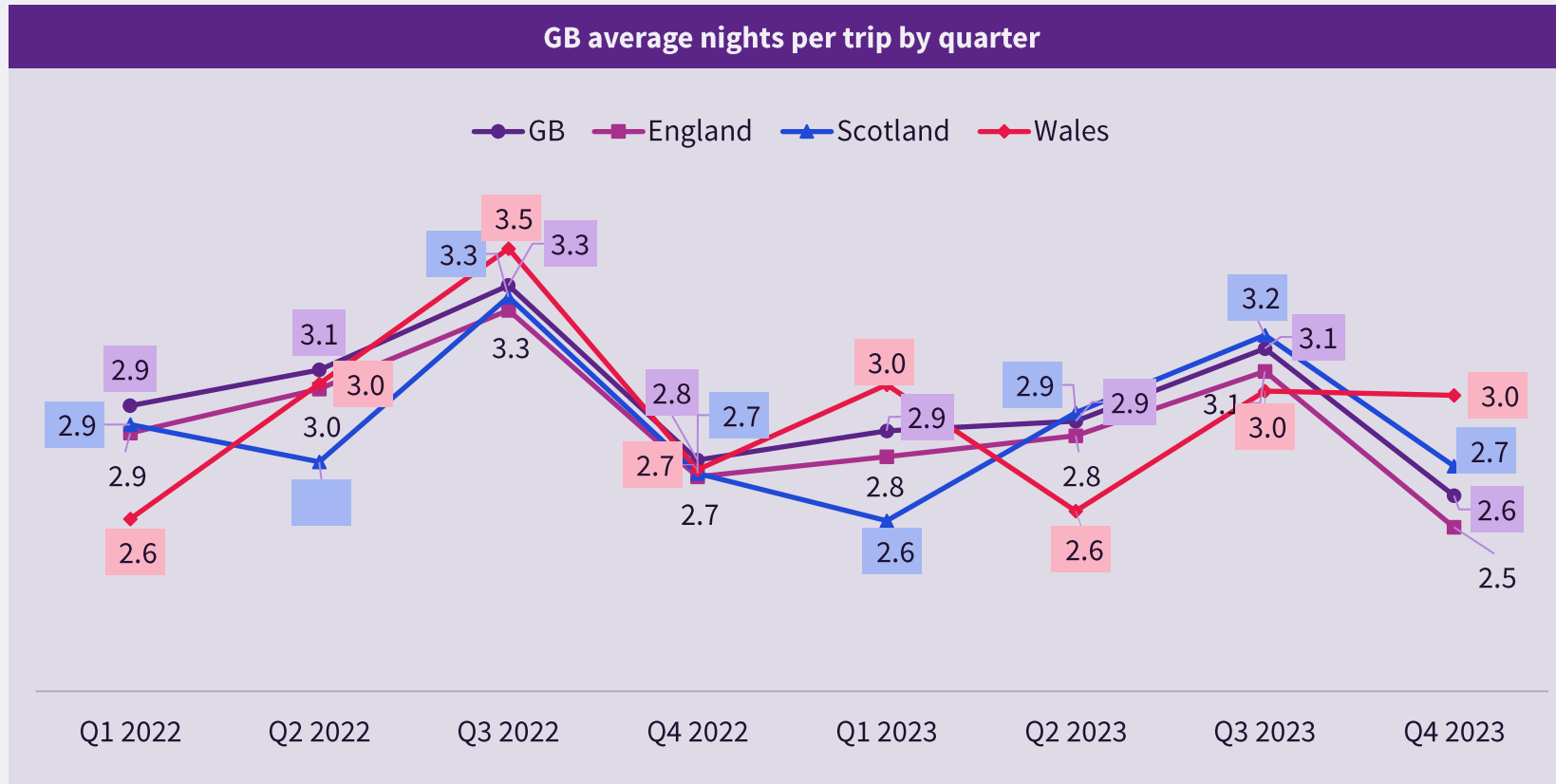
GB average spend per night by quarter



Nation	Average spend per night 2022	Average spend per night 2023
GB	£85	£92
England	£86	£93
Scotland	£85	£90
Wales	£73	£82

Average nights per trip 2022-2023

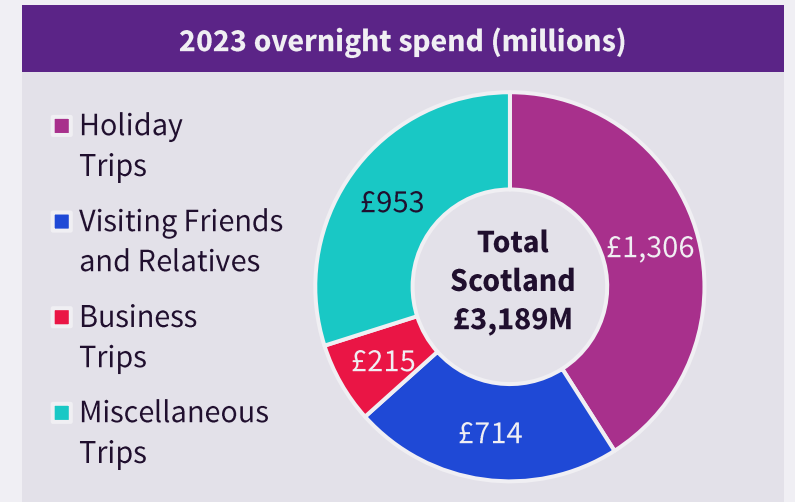
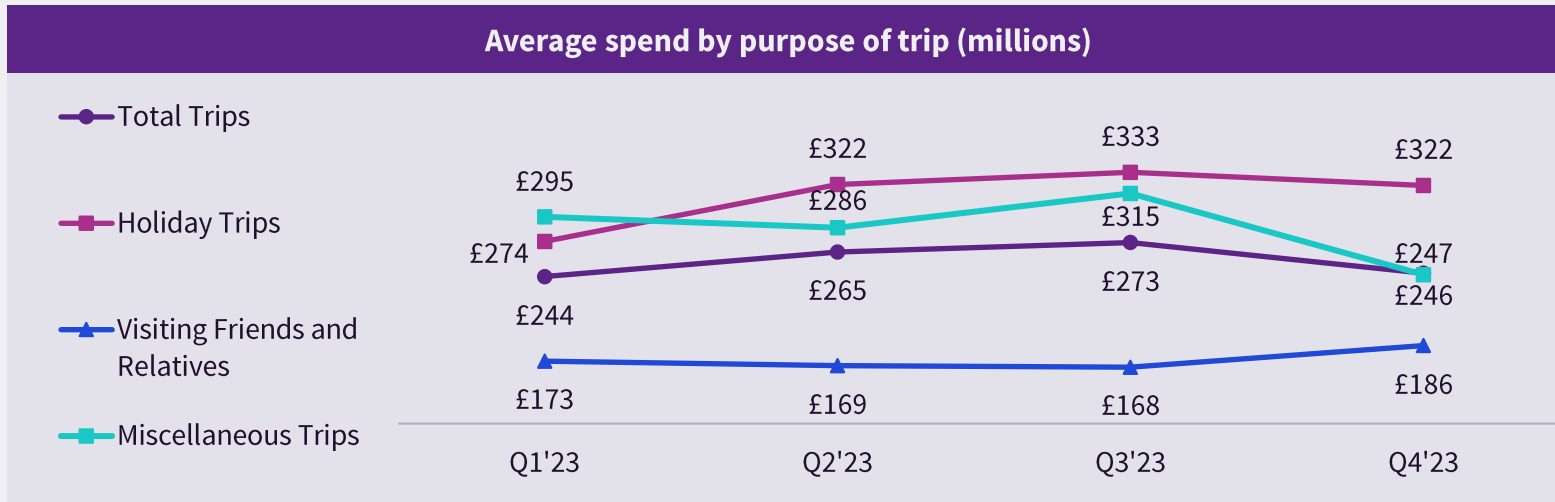
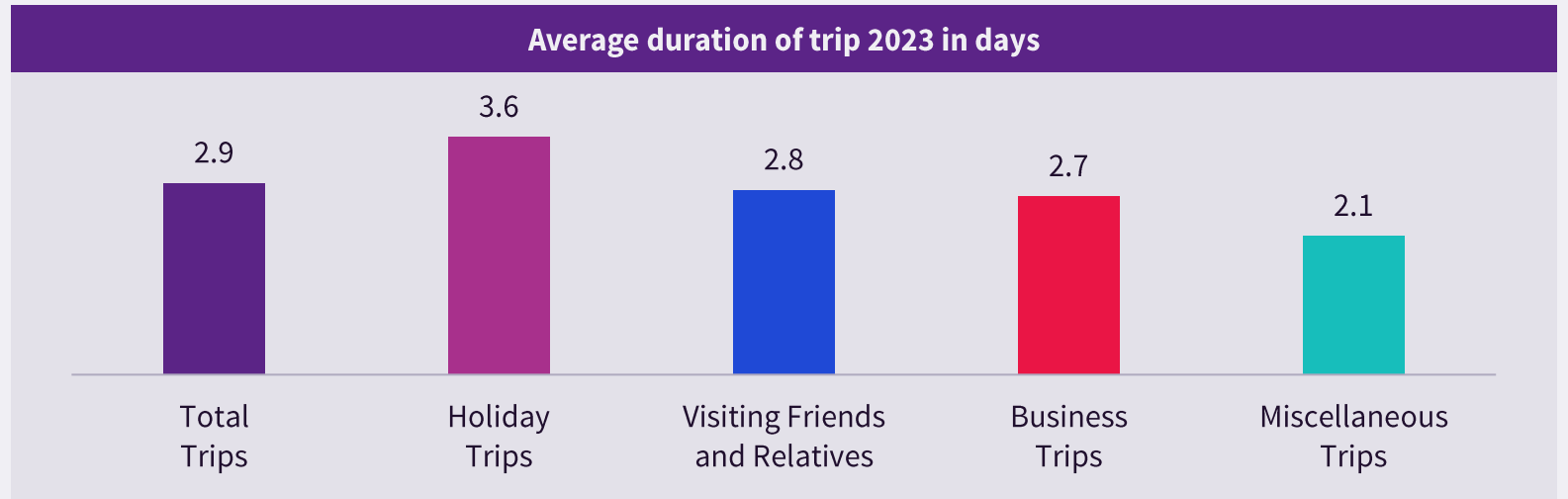
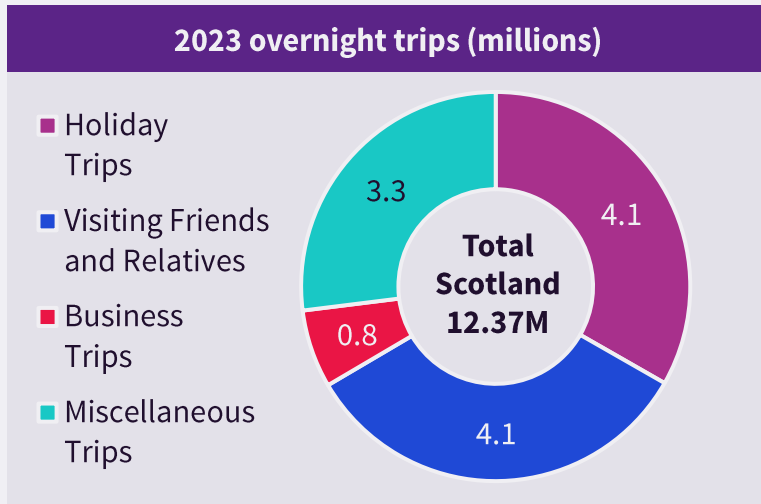
Average nights per trip fell across all nations to some degree in 2023, but this varied by quarter. In Wales, Q1 and Q4 saw an increase in average nights per trip, while Scotland saw an increase in Q2 2023, suggesting that people may be choosing to take longer trips in the less expensive seasons in 2023. Average nights per trip in England stayed the same or decreased across all quarters in 2023 versus 2022. This may be in response to inflation, whereby people reduce their trip length rather than forego the trip altogether.



Nation	Average nights per trip 2022	Average nights per trip 2023
GB	3.0	2.9
England	3.0	2.8
Scotland	2.9	2.9
Wales	3.0	2.9

Domestic Overnights Trips in Scotland 2022-2023

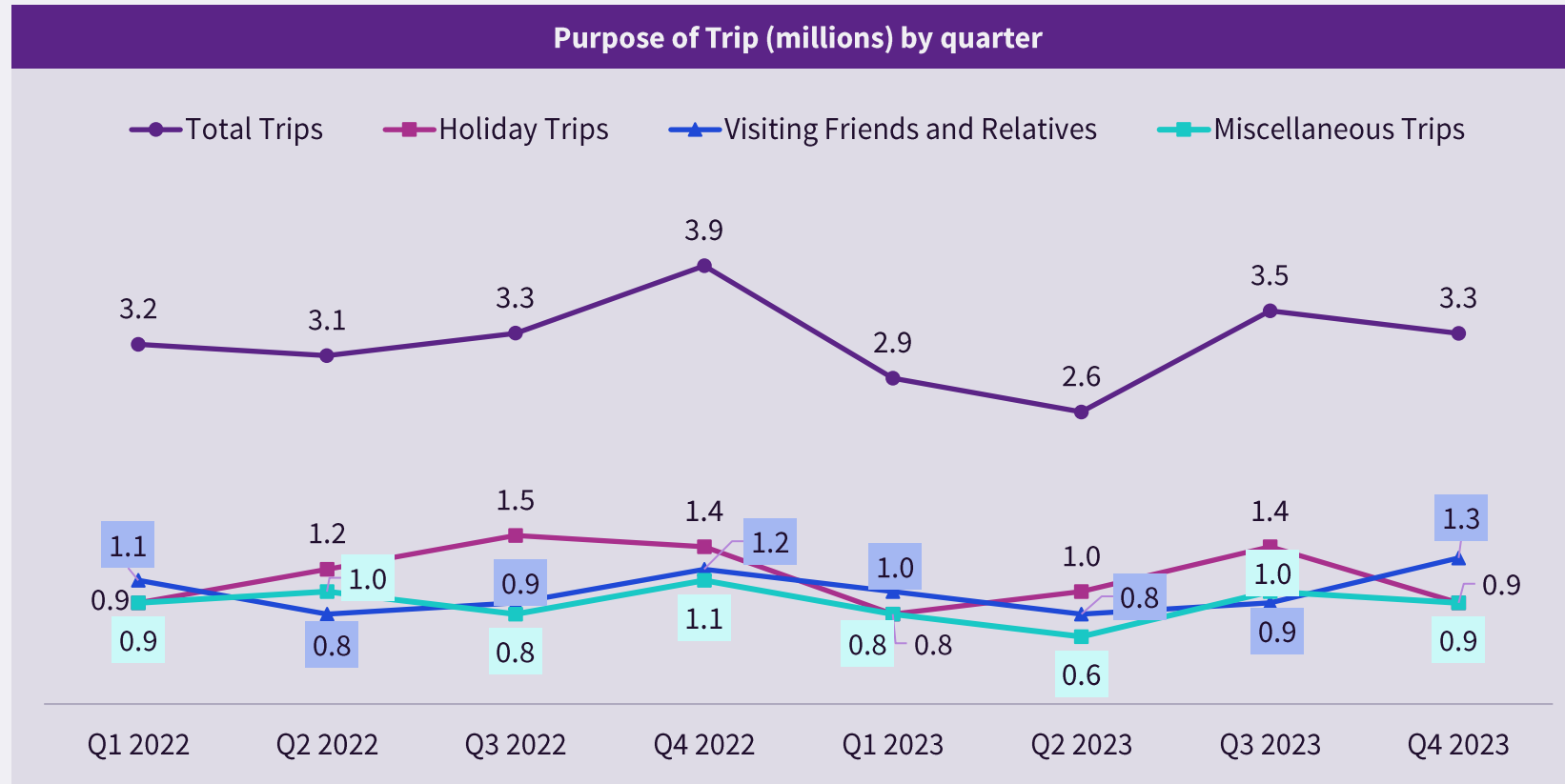
Summary of domestic overnight trips in Scotland in 2023



Base sizes for quarterly business trips are under 30 and have been excluded.

Overnight trip purpose by quarter

Holiday trips and visiting friends and relatives remained the most common reasons for taking a trip in Scotland. While the proportion of miscellaneous trips overall hasn't increased significantly, there was a 5 percentage point increase in Q3 2023 vs. Q3 2022, as more people are travelling internationally (miscellaneous trips include domestic trips as part of an overseas trip). Overall, there was a 22%** increase in holiday trips taken outside the UK by GB residents in 2023, when compared to 2022, suggesting that international holidays are replacing domestic holidays due to cost-of-living pressures.

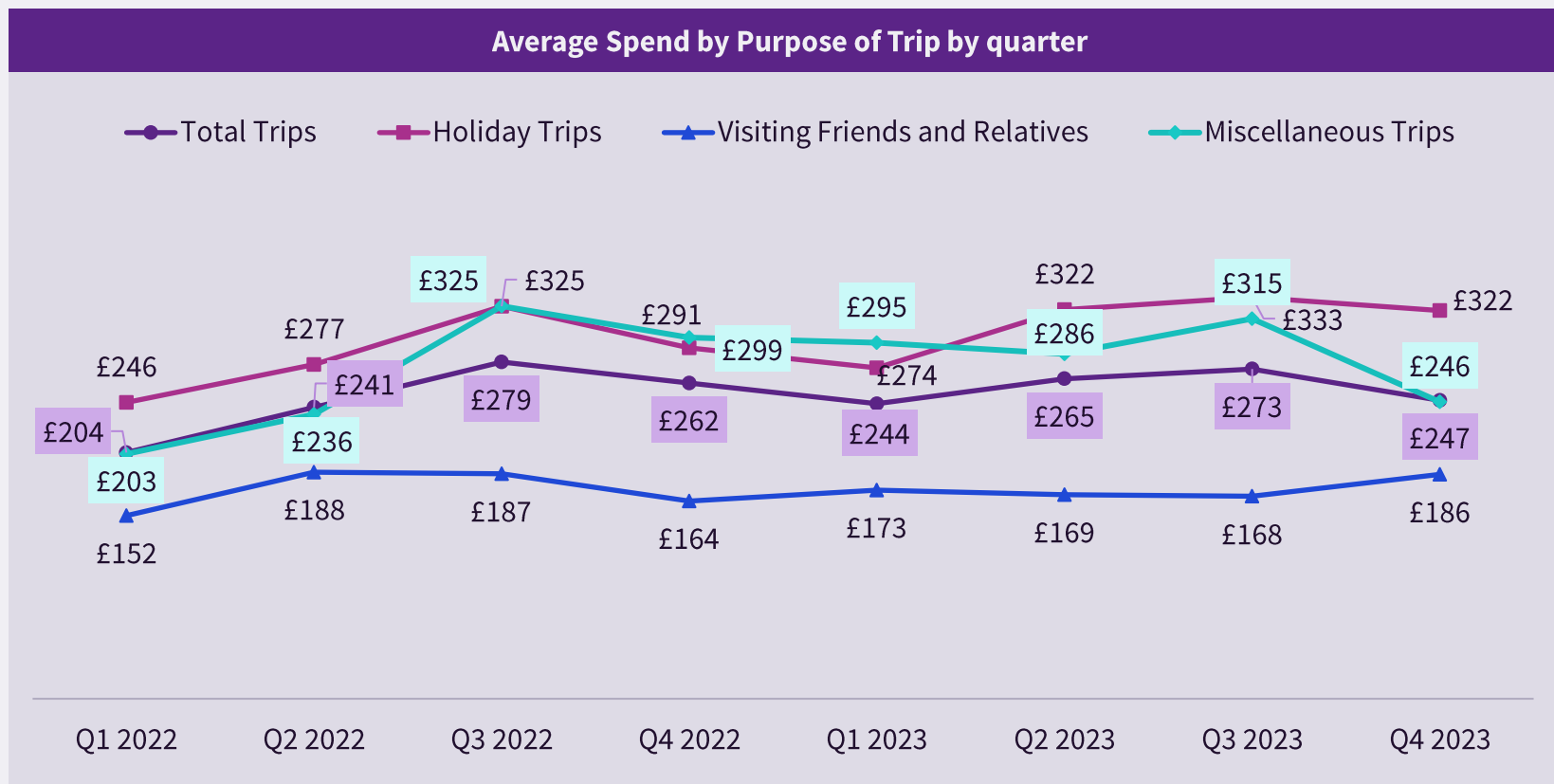


Trip Purpose	Number of Trips 2023 (millions)	Proportion of Trips
Total Trips	12.37	
Holiday Trips	4.13	33%
Visiting Friends and Relatives	4.08	33%
Business Trips*	0.83	7%
Miscellaneous Trips	3.32	27%

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Base sizes under 30 have been excluded from graphs.

Average spend by trip purpose

All trip types in 2023 experienced an increase in average spend per trip, when compared to 2022. Average spend on holiday trips in Scotland increased by 9%, which is a greater increase than all other trip types. Average spend in England and Wales also increased, which suggests it may be due to inflation.

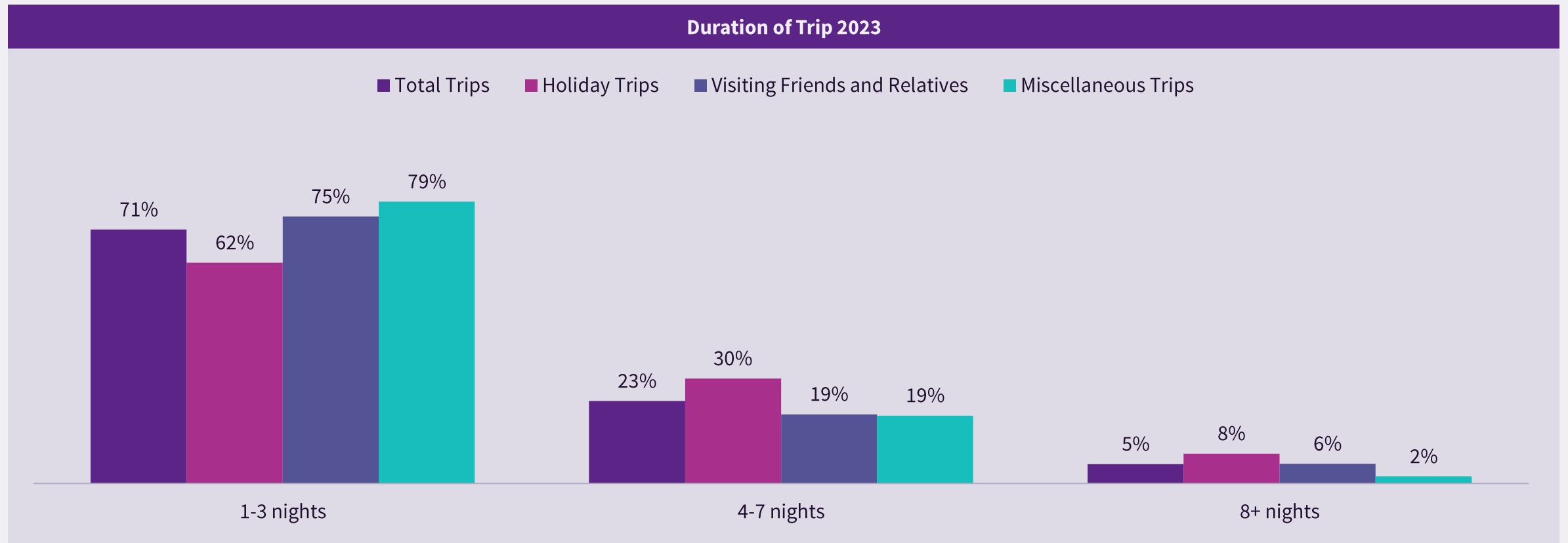


Nation	Average Spend 2022	Average Spend 2023
Total Trips	£248	£258
Holiday Trips	£289	£316
Visiting Friends and Relatives	£171	£175
Business Trips*	£310	£259
Miscellaneous Trips	£266	£287

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Base sizes under 30 have been excluded.

Duration of trip 2023

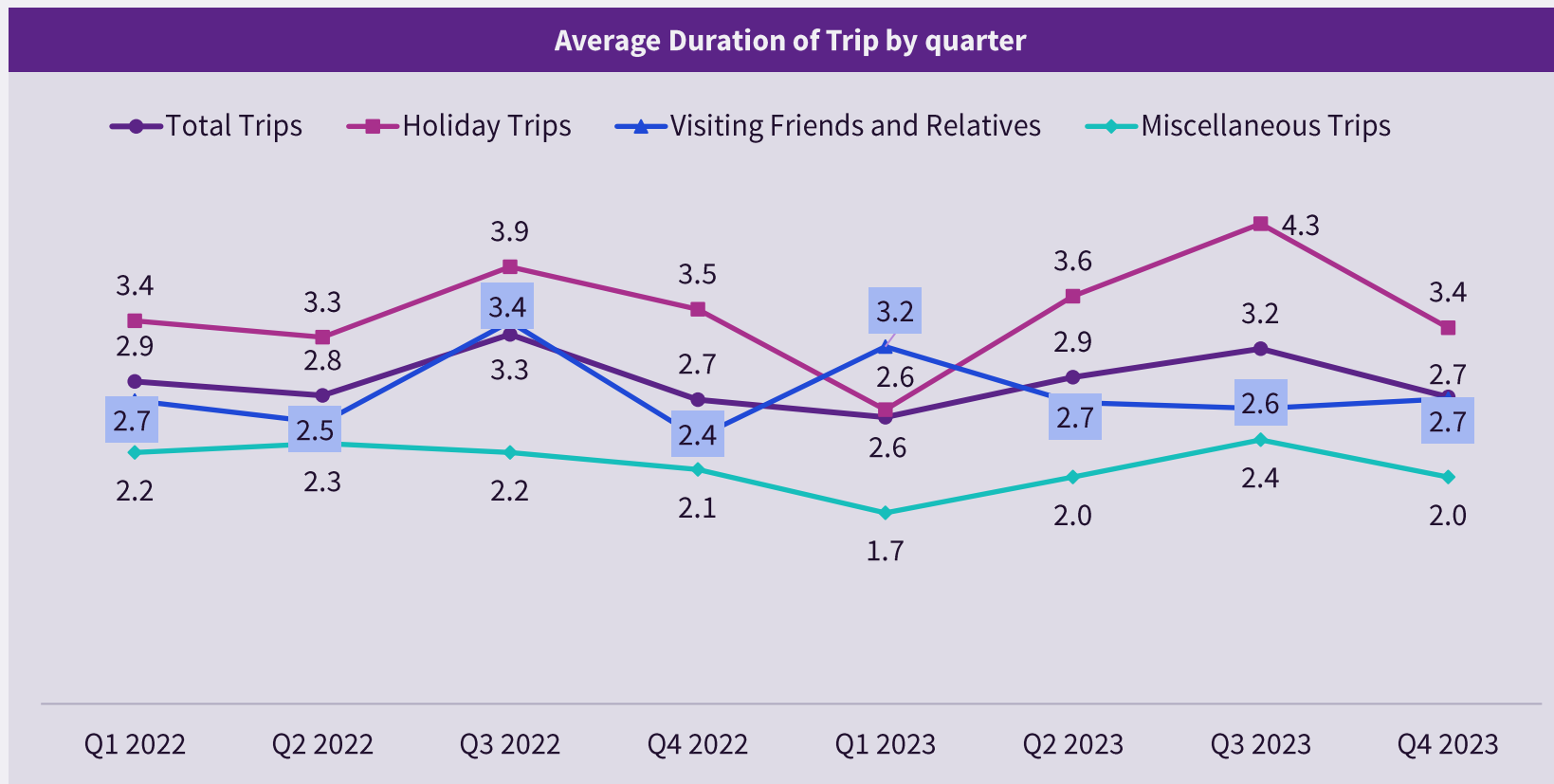
The majority of trips in Scotland in 2023 lasted 3 nights or less, this was particularly the case for visiting friends and relatives and miscellaneous trips. The duration of trips in Scotland remained static in 2023, when compared to 2022. However, this did vary by trip purpose as there was a 4 percentage point increase in the proportion of holiday trips that lasted 4-7 nights in 2023. While average spend per trip was lower on shorter trips, spend per night was significantly higher, ranging from £123 for trips lasting 1-3 nights, to £78 for trips of 4-7 nights and just £37 per night for those of 8 nights or more.



Base sizes under 30 have been excluded. 3% or less not shown.

Average duration of trip by quarter

While average duration of all trips didn't change from 2022, there was a slight increase in the average length of trips to visit friends and family, due to an 8 percentage point increase in those of retirement age visiting friends and family in 2023. Average trip length in Scotland for those at retirement age is 4.7 days versus 2.9 average across all other lifestages.

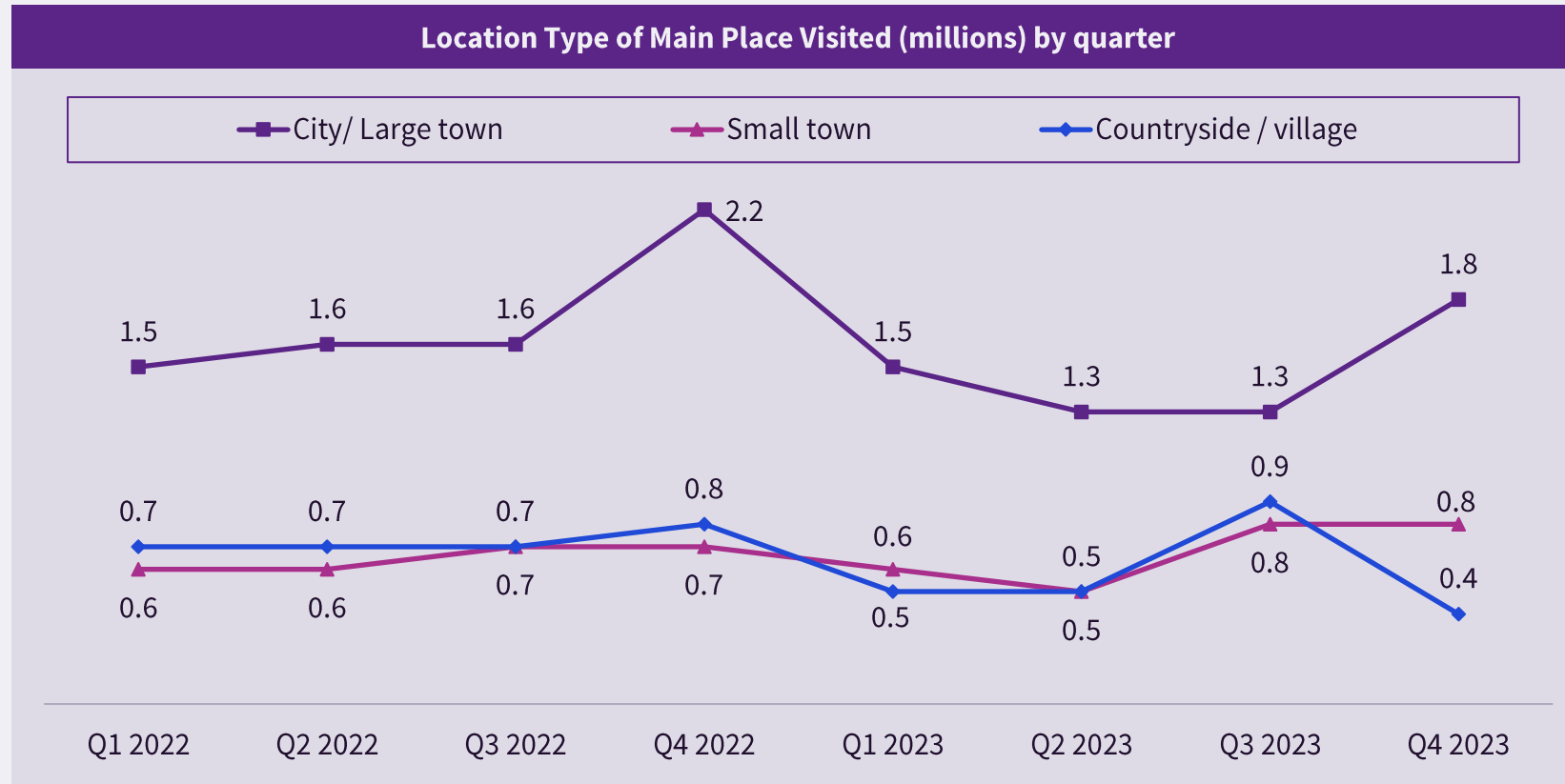


Trip Purpose	Average Duration 2022	Average Duration 2023
Total Trips	2.9	2.9
Holiday Trips	3.6	3.6
Visiting Friends and Relatives	2.7	2.8
Business Trips*	3.0	2.7
Miscellaneous Trips	2.2	2.1

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Base sizes under 30 have been excluded.

Location type of main place visited overnight

Cities and large towns proved to be the most popular destinations in 2023 in Scotland, followed by small towns and the countryside. There was a 4 percentage point increase in the proportion of trips in small towns, a trend also seen in England. Seaside/coastal areas experienced a 5 percentage point increase in holiday trips, suggesting there is a return to the Scottish seaside. While trips in the countryside didn't change significantly (-3pp), it was still a popular destination during the summer holidays.

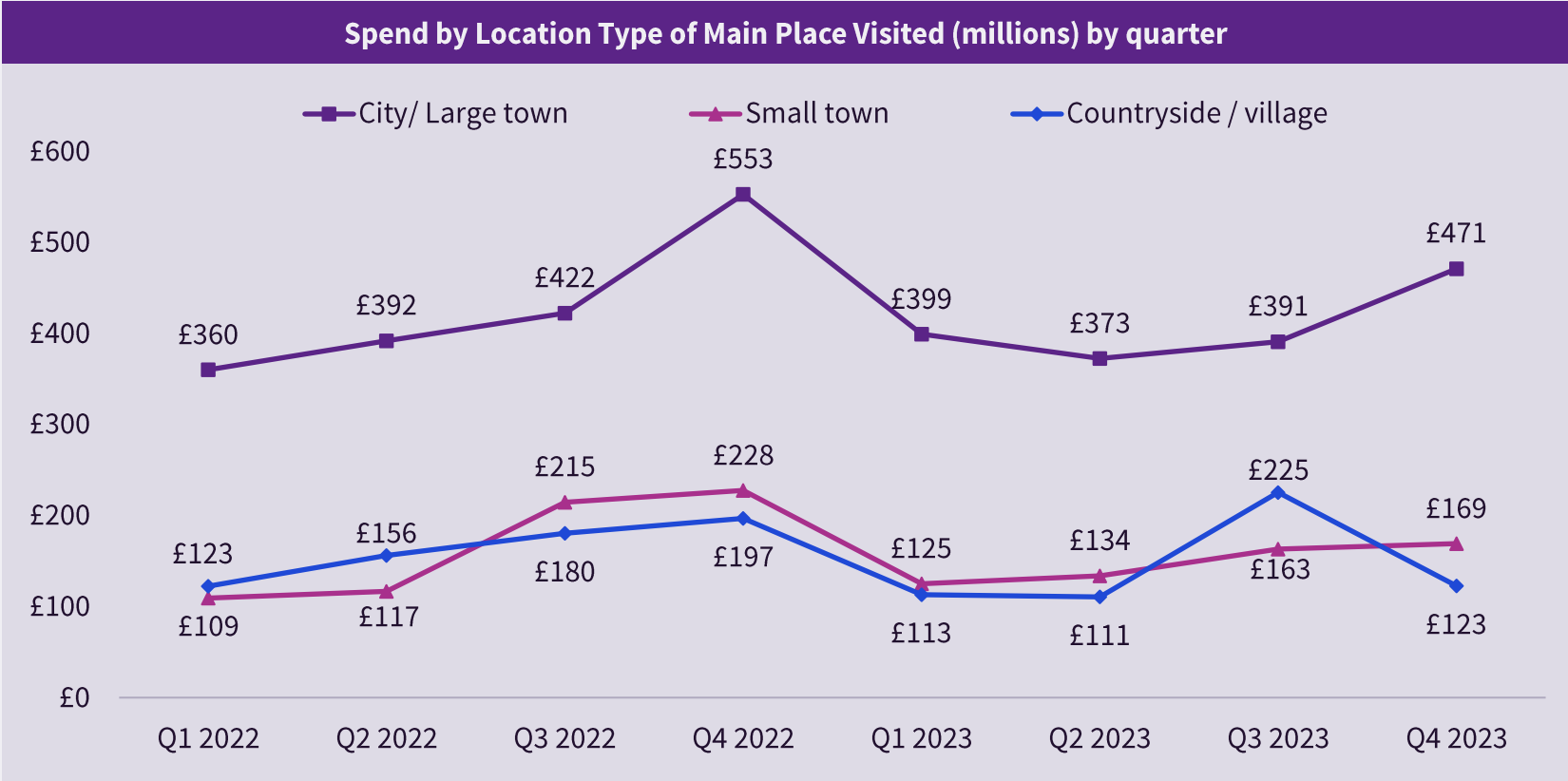


Location Type	Trips 2023 (millions)	Proportion of Trips
Seaside or other coastal*	1.12	9%
Large city large town	5.92	48%
Small town*	2.80	23%
Countryside village*	2.33	19%

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Base sizes under 30 have been excluded in quarterly trends.

Spend by location type of main place visited 2023

Overnight trips to large cities and towns represented half of all spend on overnight domestic trips in 2023, which was unchanged from 2022. Spend on trips in the seaside/coastal areas increased by 58%, from £210m in 2022 to £332m in 2023. Despite an increase in the proportion of overnight domestic trips in small towns, this trend was not reflected in spend in 2023.

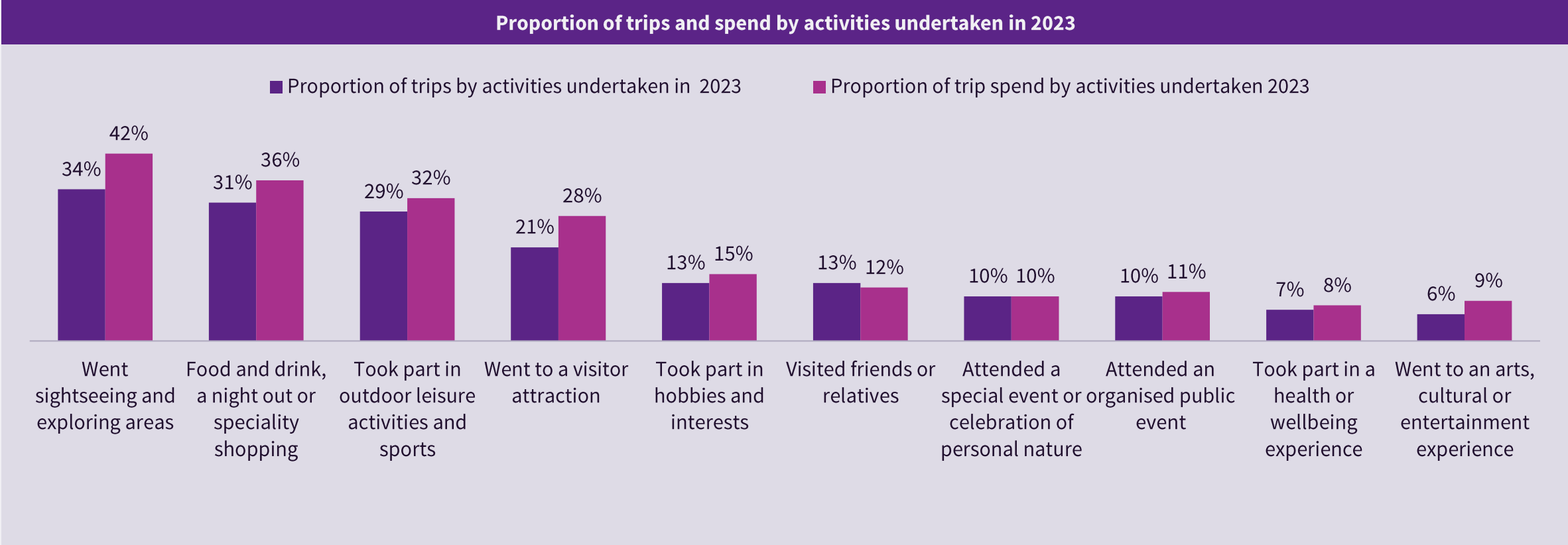


Location Type	Spend 2023 (millions)	Proportion of Spend
Seaside or other coastal	£332	10%
Large city/ large town	£1,634	51%
Small town*	£592	19%
Countryside/ village*	£572	18%

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Base sizes under 30 have been excluded in quarterly trends.

Trips and trip spend by activities undertaken in 2023

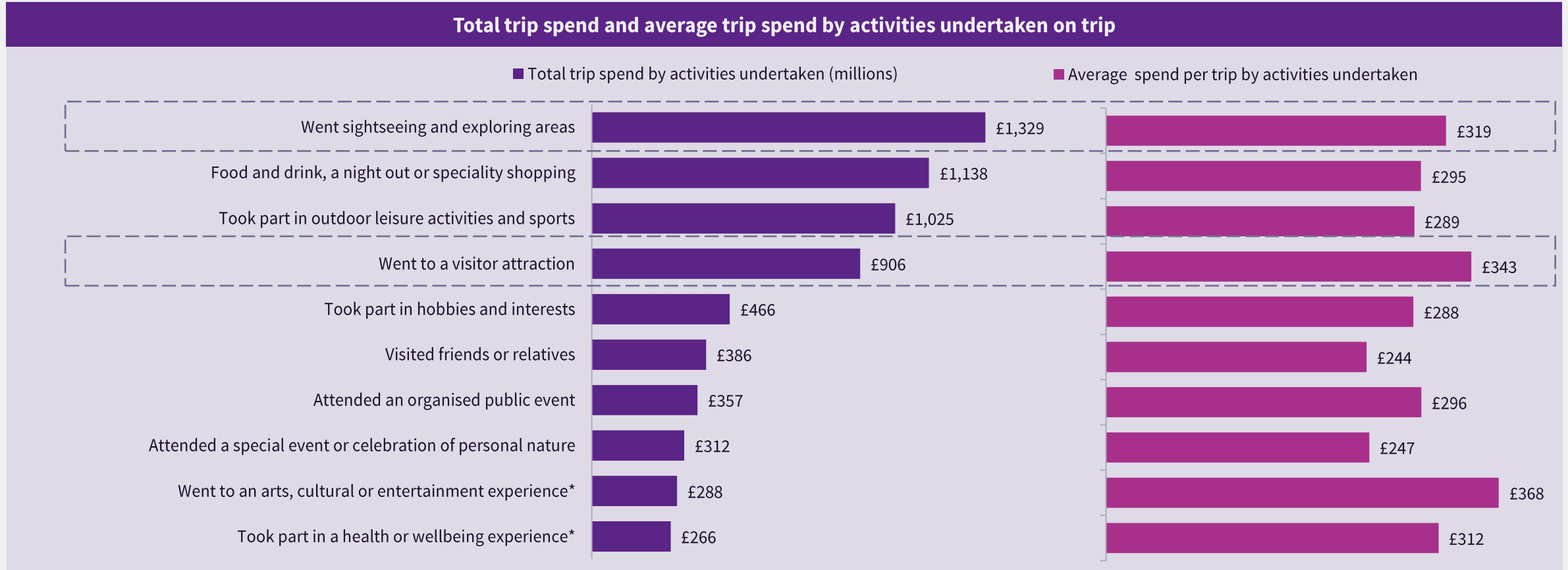
‘Sightseeing’, ‘food and drink, a night out and speciality shopping’ were the most popular trip activities in Scotland in 2023. Compared with 2022, there was a 4 percentage point increase in the proportion of trips where food, drink and speciality shopping took place and a 6 percentage point increase in spend. While the proportion of trips that included sightseeing as an activity remained unchanged, there was a 6 percentage point increase in spend. As seen across Great Britain, there was a slight drop in the proportion of trips that included attending a visitor attraction (-3pp), due to a 12 percentage point drop in those of retirement age taking trips for this purpose.



NOTE: Slide shows the proportion of trip and spend which involved each activity, it adds up to more than 100% as more than one activity could be undertaken on a visit.

Trip spend by activities undertaken in 2023

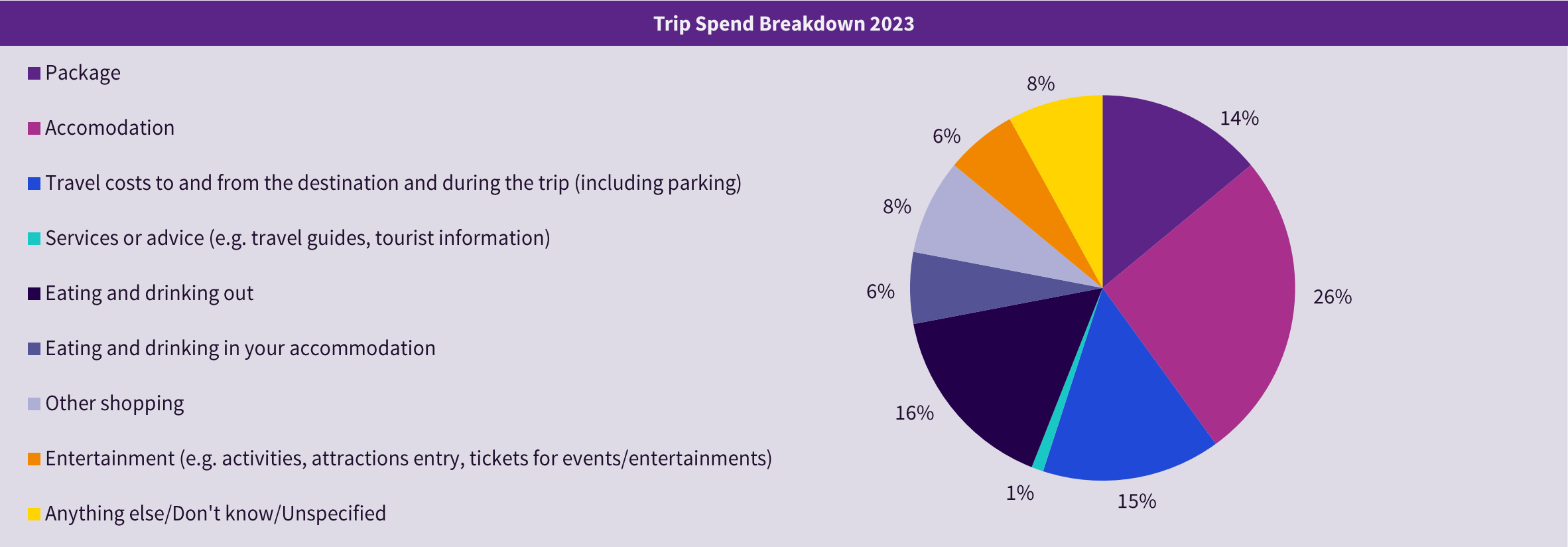
Trips that included sightseeing, or attending a visitor attraction, had the highest average spend per trip in Scotland in 2023. There was a 37% increase in spend on trips that included an organised public event such as a concert or live sports, with spend more than doubling in Q1 and Q2, when compared to the same quarters in 2022. Spend on food, drink, a night out or speciality shopping increased by 16%, from £981 in 2022 to £1138 in 2023, with an 8 percentage point increase in younger independents taking trips for these activities in 2023.



*Base size is between 30 and 100, it is recommended to only use the estimates as indicative.

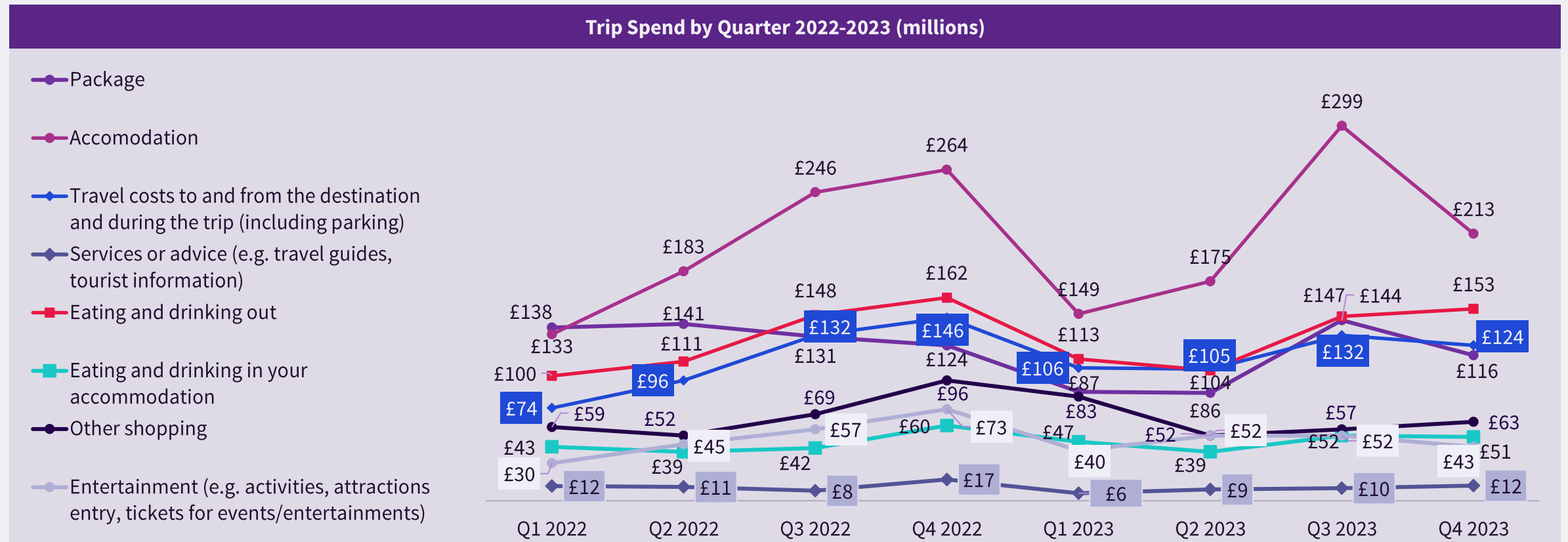
Trip spend breakdown 2023

Trip spend in Scotland decreased by 4% in 2023, mostly due to a 19% drop in spend on package holidays. There was minimal change in the proportion of spend on each category in 2023, the majority of trip spend still goes to accommodation, package holidays and eating and drinking. However, in 2022, almost one fifth (18%) of trip spend by those of retirement age was on package holidays, this decreased to just 8% in 2023.



Trip spend by quarter 2022-2023

Spend on other major categories, such as travel (+4%) and accommodation (+1%) increased marginally between 2022 and 2023, which is lower than inflation at 4.0%. While the overall annual spend breakdown is very similar to 2022, package holidays, for example, decreased from 21% in Q1 and 19% in Q2 2022 to 12% in Q1 and Q2 in 2023. This may be due to the 14 percentage point drop off in younger independents taking trips in these quarters. The significant increase in spend on accommodation in Q3 2023 contributes to the strong Summer period spend, when compared to 2022.



Trips, nights and spend by region of residence 2023

Trips by England residents represented 41% of all overnight trips in Scotland in 2023, a drop of 3 percentage points when compared to 2022. England residents tend to spend more and stay longer than Scotland residents. Focusing solely on Scotland residents, West Scotland residents took the largest proportion of overnight trips in Scotland, but it is North Scotland residents who had the highest average spend and nights per trip.

Total trips	Trips (millions)	Nights (millions)	Spend (millions)
Net: England	5.06	17.17	£1,551
London*	1.19	3.67	£371
Rest of England (not London)	3.87	13.51	£1,180
Net: Scotland	7.15	17.66	£1,562
East Scotland	2.27	5.82	£471
North Scotland	1.35	3.80	£313
South Scotland**	0.16	0.25	£36
West Scotland	3.38	7.79	£742
Net: Wales*	0.16	0.57	£75

Holiday trips	Holiday Trips (millions)	Holiday Nights (millions)	Holiday Spend (millions)
Net: England	1.90	8.01	£699
London*	0.50	1.61	£181
Rest of England (not London)	1.40	6.40	£518
Net: Scotland	2.18	6.60	£586
East Scotland*	0.67	2.33	£182
North Scotland*	0.43	1.38	£125
South Scotland**	0.04	0.05	£7
West Scotland	1.04	2.85	£272
Net: Wales**	0.06	0.24	£21

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative.

**Base sizes under 30, not recommended to use this data.

Trips, nights and spend by region visited 2023

In 2023, East Scotland was the region with the most trips and spend, although only marginally higher than West Scotland. For holiday trips, the proportion of trips in East Scotland increased by 3 percentage points when compared to 2022. Overall, overnight trips in North and South Scotland tended to be longer in duration, averaging 3.1 nights versus 2.6 nights in the other regions.

Total trips	Trips (millions)	Nights (millions)	Spend (millions)
East Scotland	4.46	11.78	£1,173
North Scotland	3.16	9.94	£776
South Scotland*	0.74	2.24	£175
West Scotland	4.37	11.45	£1,065

Holiday Trips	Holiday Trips (millions)	Holiday Nights (millions)	Holiday Spend (millions)
East Scotland	1.52	4.78	£495
North Scotland	1.10	3.98	£339
South Scotland*	0.44	1.57	£104
West Scotland	1.22	4.52	£369

*Base size is between 30 and 100, it is recommended to only use the estimates as indicative.

Scotland Profile of Trips

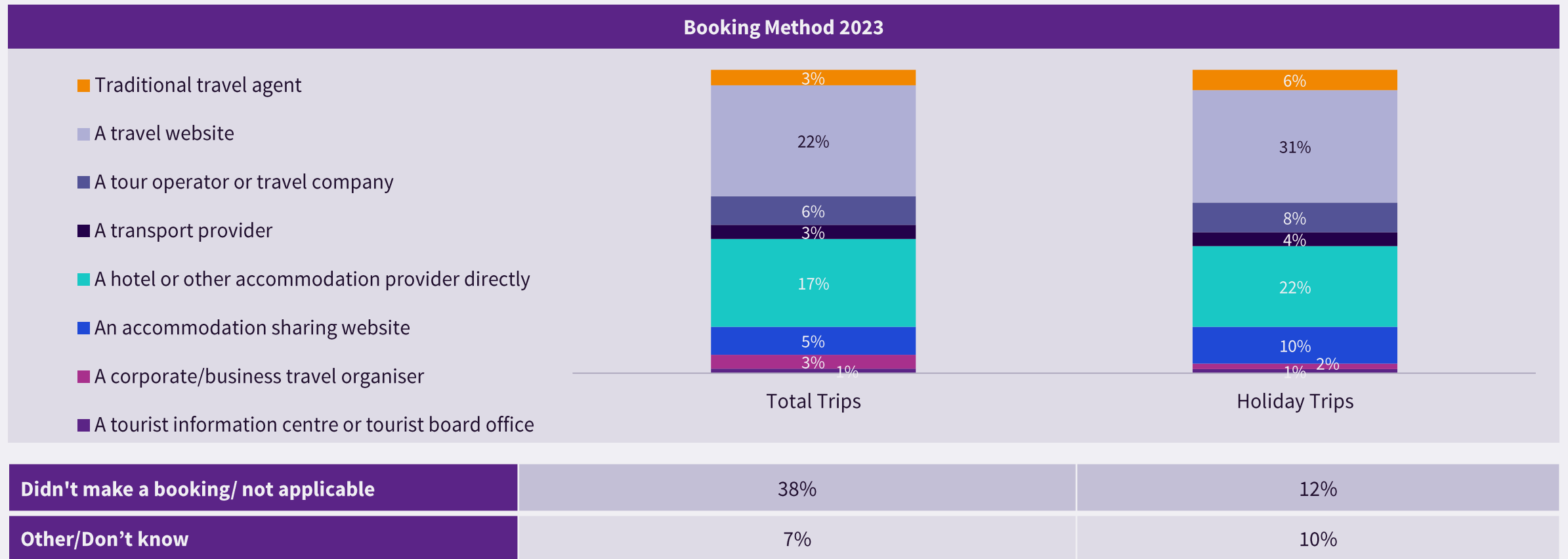
Accommodation booking lead time 2023

6 in 10 trips in Scotland were booked in advance in 2023, but just 3 in 10 trips were booked more than two months in advance. While this is unchanged since 2022, there was a 5 percentage point decrease during the peak summer season. When looking at the profile of trip takers, there was a 5 percentage point decrease in young people (16-34 years) booking well in advance (2 or more months). Holiday trips experienced a similar drop in advance booking, 42% were booked two or more months in advance, a 6 percentage point decrease when compared to 2022. While in 2022 holiday trips booked 2 or more months in advance represented 58% of spend, this reduced significantly in 2023 to 47%.



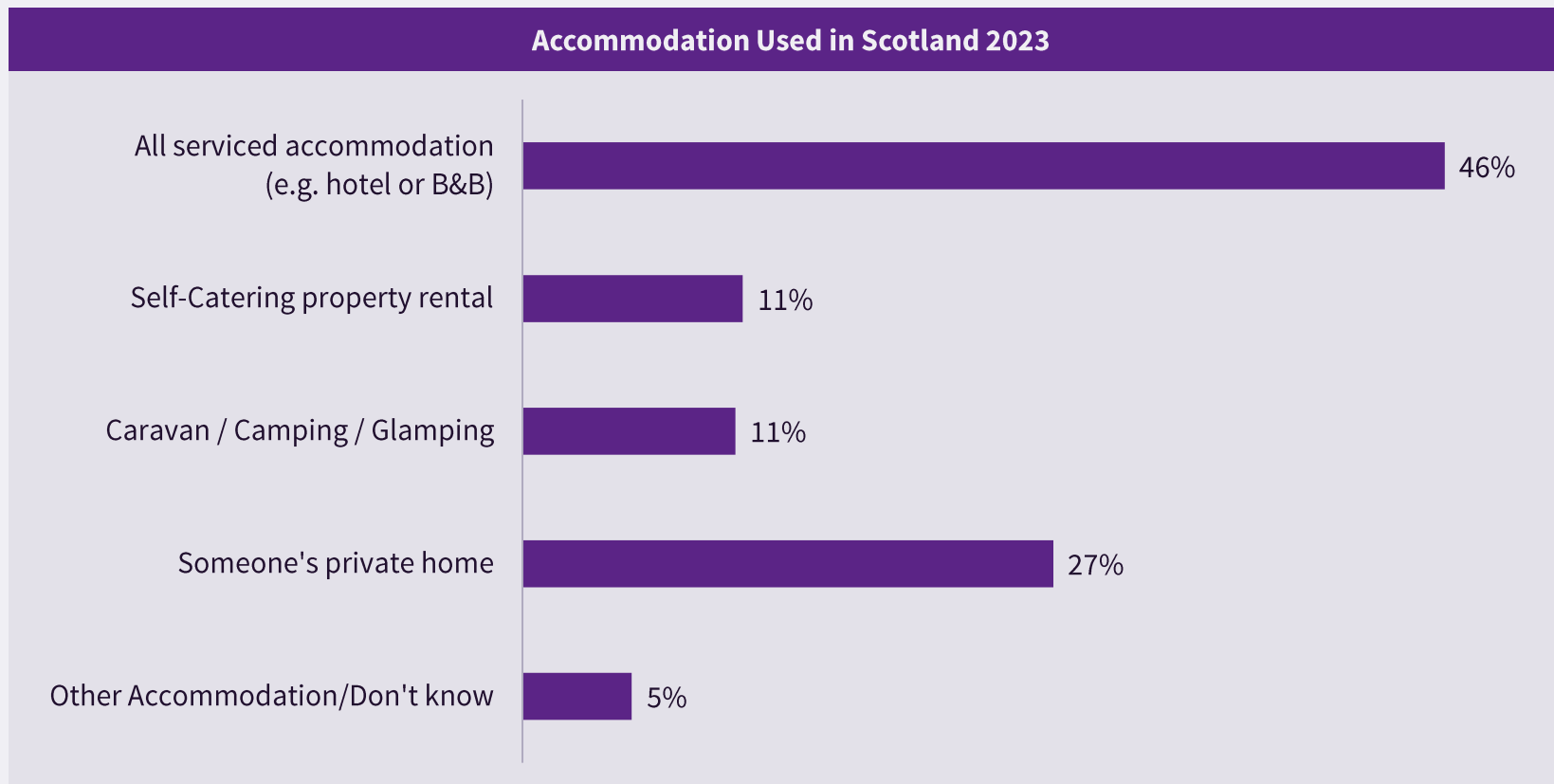
Booking method 2023

Travel websites and accommodation providers were the most popular means of booking a holiday to Scotland in 2023. There was little change in booking methods between 2022 and 2023, however there was an increase of 11 percentage points in trips with older independents booking through accommodation providers, from 18% to 29%. As expected, a higher proportion of holiday trips used travel websites, accommodation providers and accommodation sharing websites to book in advance, when compared to trips overall. There was a 3 percentage point increase in holiday trip bookings through accommodation sharing websites between 2022 and 2023.



Accommodation used on overnight trips in 2023

Serviced accommodation was the most common type of accommodation used on overnight trips in Scotland, followed by staying in someone's private home, which increased by 3 percentage points when compared to 2022. This increase is mainly due to a 9 percentage point increase in younger independents choosing this accommodation type. The type of accommodation used varies by trip purpose, with 1 in 5 holiday trips favoring camping. While average spend per trip is highest for self-catering accommodation, this is due to the longer duration of these trips (average of 4.1 days vs 2.5 for serviced accommodation).

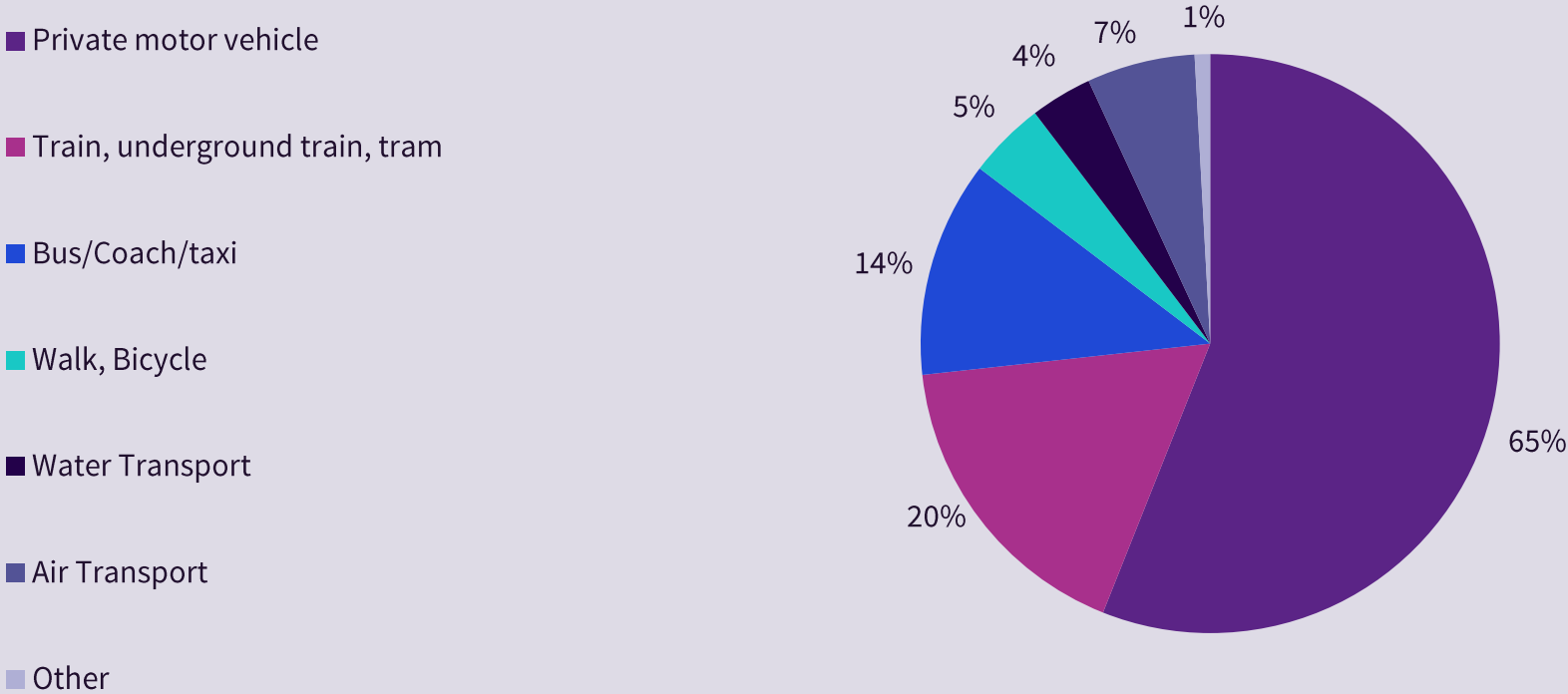


Accommodation used	Average spend per trip
Serviced accommodation	£321
Self-Catering property rental	£372
Caravan/ Camping/ Glamping	£214
Private home	£125
Other*	£227

Transport used to travel to main destination in 2023

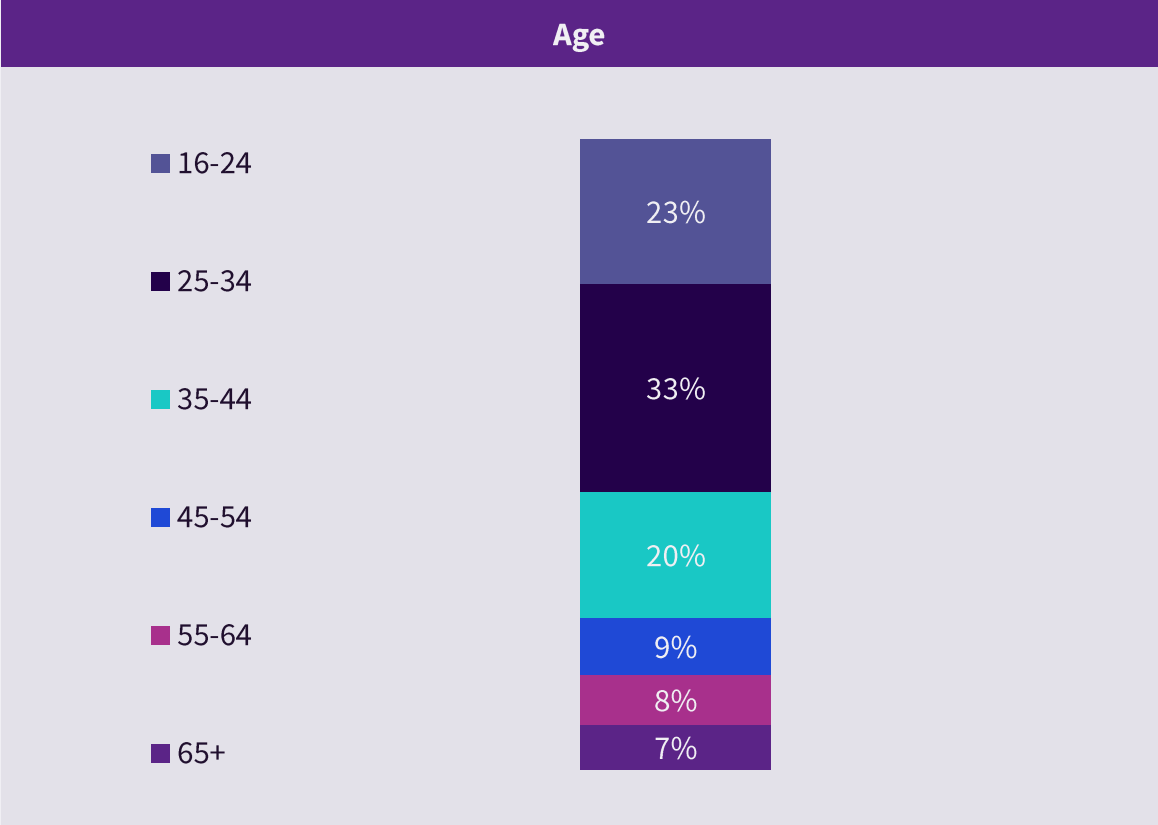
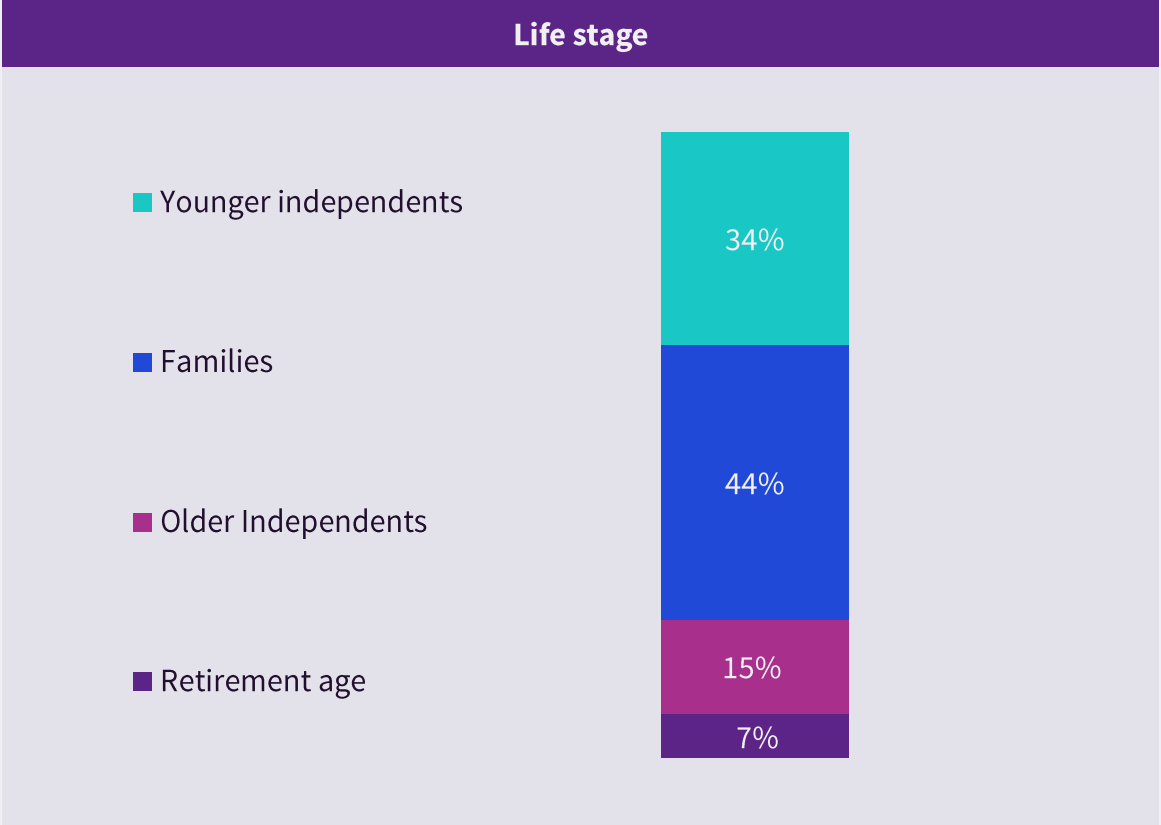
While the majority of trips used a private motor vehicle, business trips were most likely to use public and other types of transport. There was a trend away from car travel in England and Scotland in 2023, with a 2 percentage point decrease in the proportion of Scotland trips which used a car as the main transport, and a 3 percentage point decrease in trips by car owners. However, this was only outside the peak Q3 period where 7 in 10 trips used a car as their main transport.

Transport used for travel to main destination in 2023



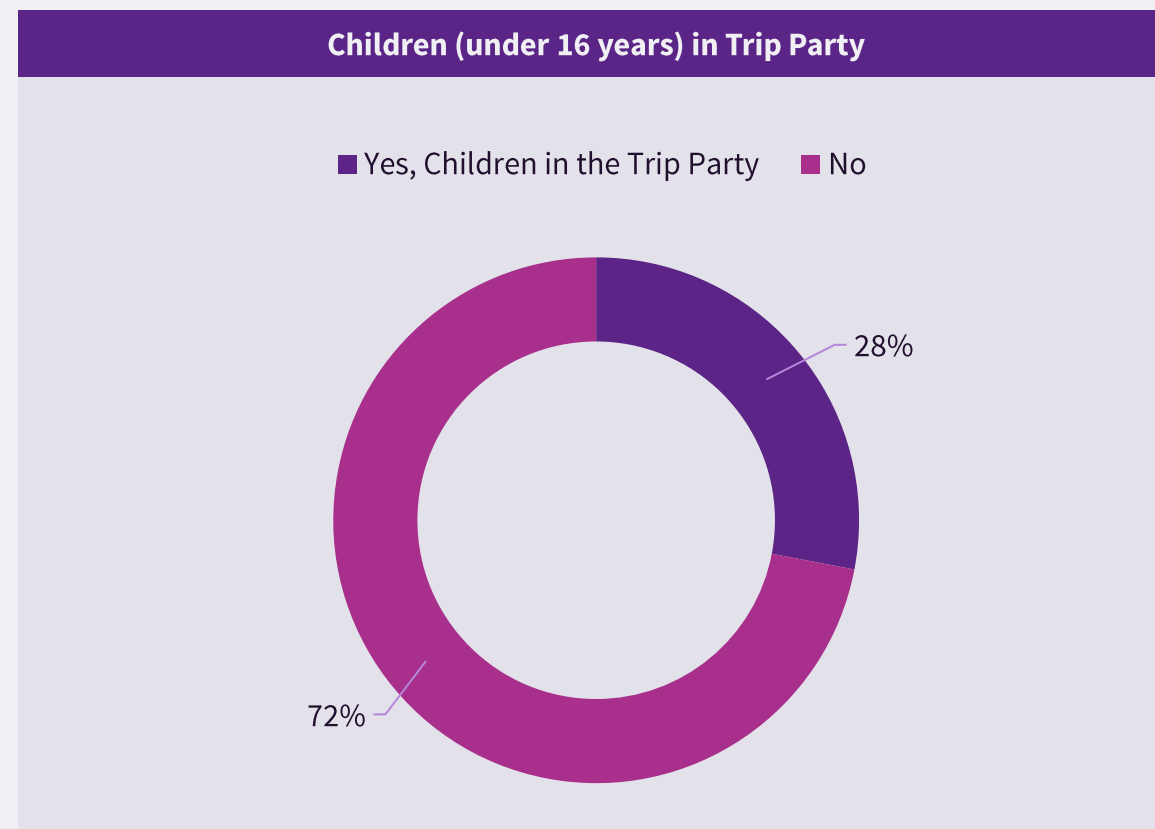
Lifestage and age profile for domestic trips 2023

The highest proportion of trips made in 2023 were by those in the family lifestage at 44%, however, these trips had the lowest average spend per trip. Trips in Scotland by younger independents increased by 5 percentage points in 2023 and have a comparatively younger age profile than trips in Great Britain more generally, with 56% of trips made by under 35 year olds versus 44% to Great Britain. In 2023, there was a 4 percentage point increase in trips taken by 16-34 year olds in Scotland.



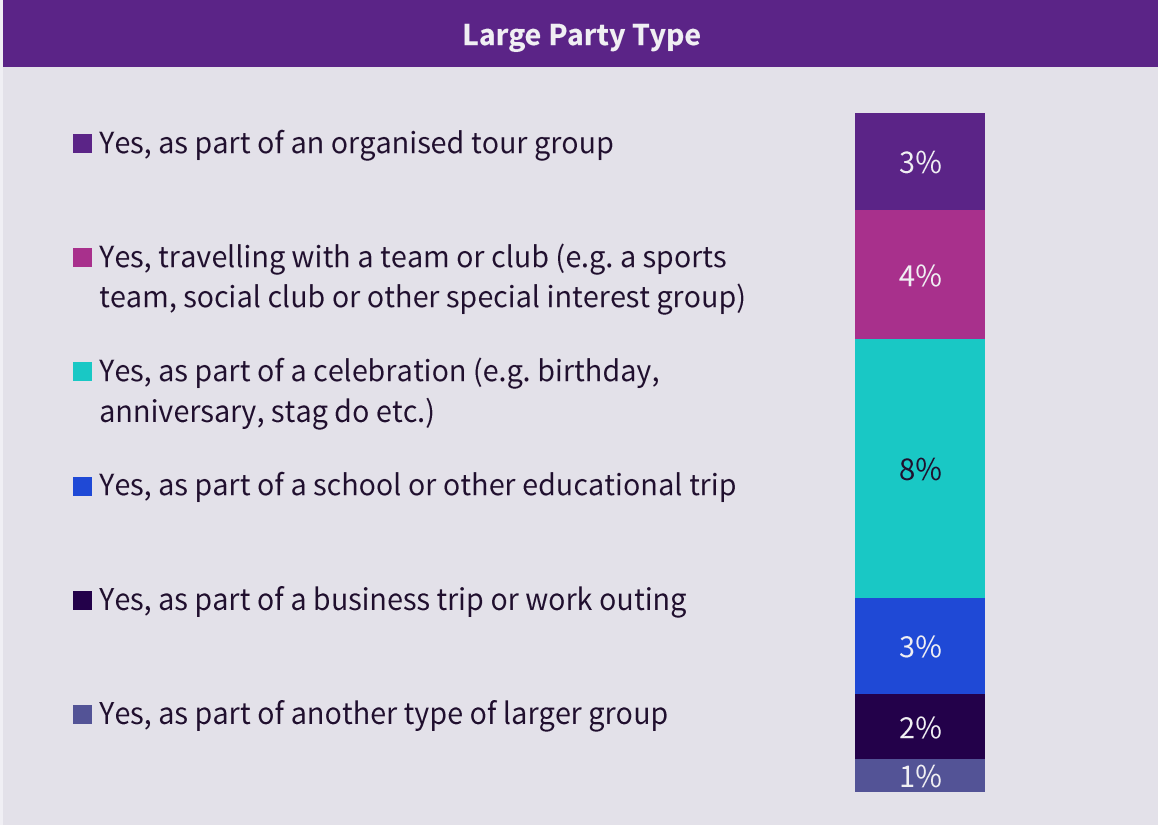
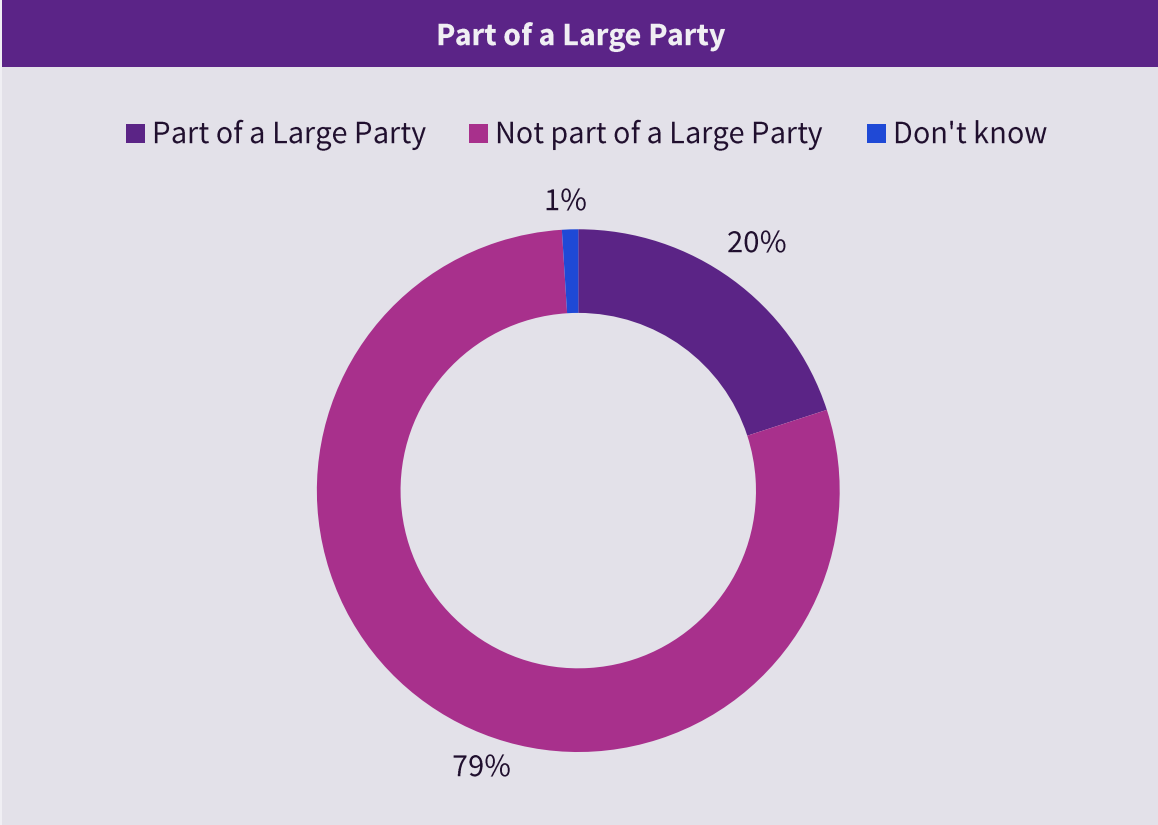
Trip party size 2023

Two thirds of trip parties were made up of 2 people or less. 32% of those visiting friends and relatives and 43% of those on business trips were solo travellers. There was a 9 percentage point increase in solo travellers in the retirement age lifestage segment, when compared to 2022. 1 in 4 trip parties have children present, unchanged from 2022, and there is little difference between trip types. Trip parties with children have a lower average spend (£207 vs £278) but a slightly longer average duration (3.0 days vs 2.8 days) than those without.



Trip party composition 2023

1 in 5 trips were part of a larger group in 2023, with celebrations such as birthdays and anniversaries being the most prevalent large group type. There was a 9 percentage point increase in large group trips in Q3 2023 vs Q3 2022. Trips with larger groups have a higher average spend than those not part of a larger group (£278 versus £254) but lower average duration (2.3 days vs 3.0 days). Tour groups are the biggest average spenders at £393 per trip.



Trips by home region and region of visit 2023

Scottish residents prefer their own region for overnight trips, over other Scotland regions. There was a 4 percentage point increase in Scotland residents taking trips in the West of Scotland in 2023, when compared to 2022. The East of Scotland is most popular among England residents from all regions, this is a change from 2022 where Londoners preferred the North of Scotland.

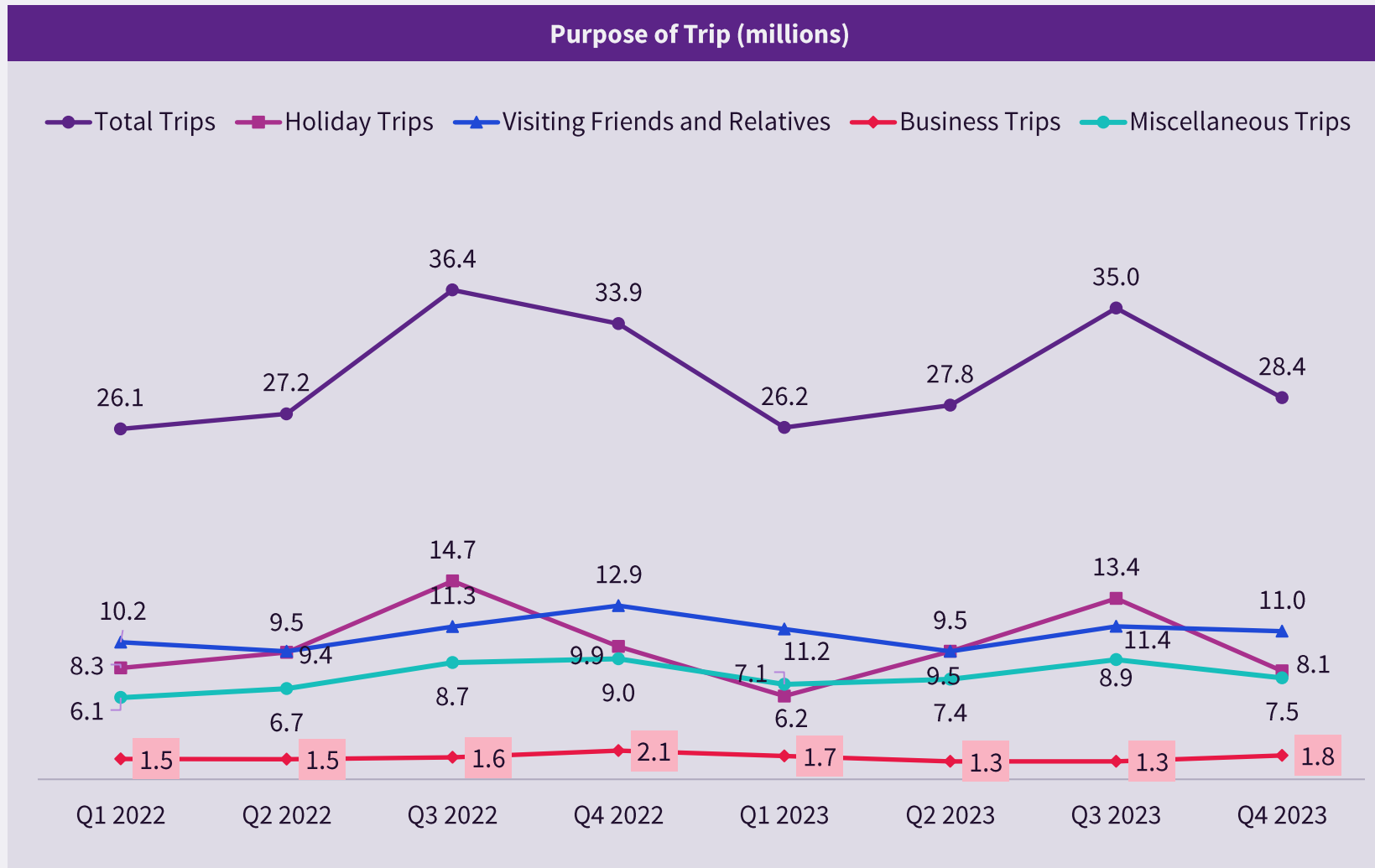
		HOME REGION												
		Net England	East Midlands	London	North West England	South East England	Yorkshire & the Humber	West Midlands	Rest of England (Not London)	Net Scotland	East of Scotland	North of Scotland	West of Scotland	Net Wales
REGION VISITED	Base sizes of home region	355	34	77	66	35	30	32	278	879	272	167	420	31
	East of Scotland	41%	46%	43%	42%	45%	38%	43%	41%	32%	51%	25%	23%	42%
	North of Scotland	30%	21%	39%	25%	28%	37%	34%	27%	23%	17%	52%	16%	13%
	South of Scotland	7%	10%	0%	14%	3%	12%	7%	9%	5%	5%	1%	7%	10%
	West of Scotland	26%	23%	22%	27%	29%	14%	21%	28%	42%	30%	23%	57%	38%

*Note that the above table is based on trips to Scotland, therefore the percentages exclude trips to England and Wales. Home regions with a base size less than 30 have been excluded. For base sizes between 30 and 100, it is recommended to only use the estimates as indicative.

APPENDIX

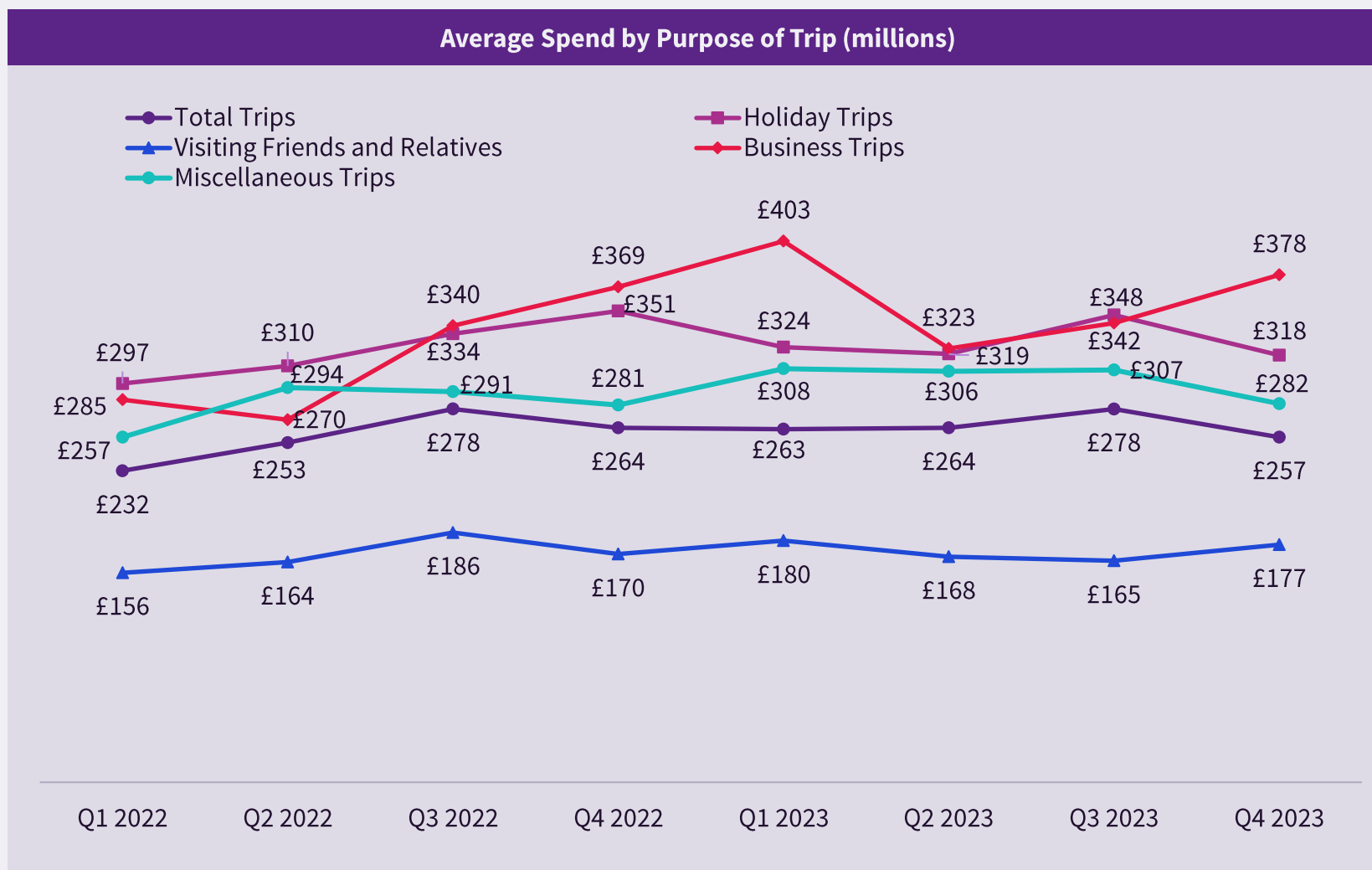
GBTS Annual Tables 2022 and 2023

Trip purpose by quarter in Great Britain



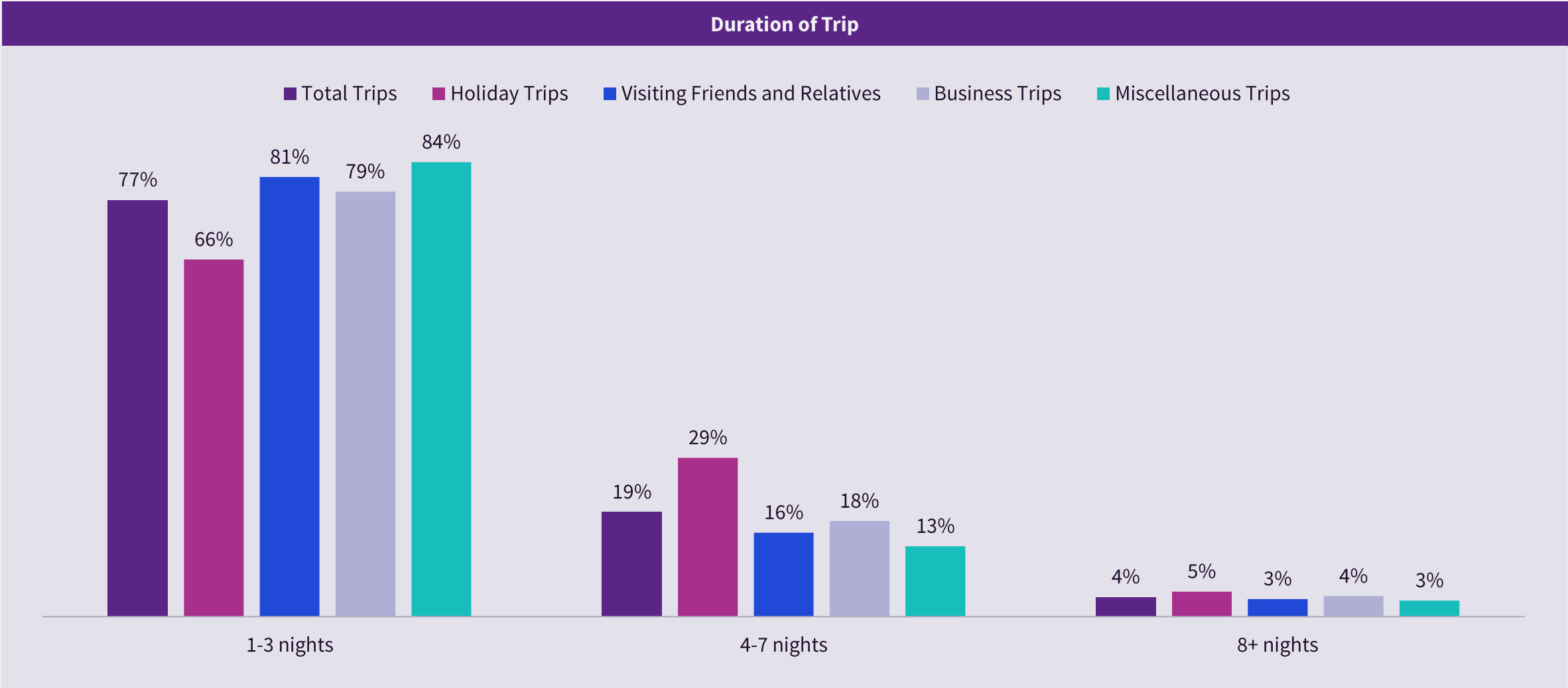
Purpose of Trip	Number of Trips 2023	Proportion of Trips
Total Trips	117.4	
Holiday Trips	37.2	32%
Visiting Friends and Relatives	43.1	37%
Business Trips	6.2	5%
Miscellaneous Trips	30.9	26%

Average spend by trip purpose in Great Britain

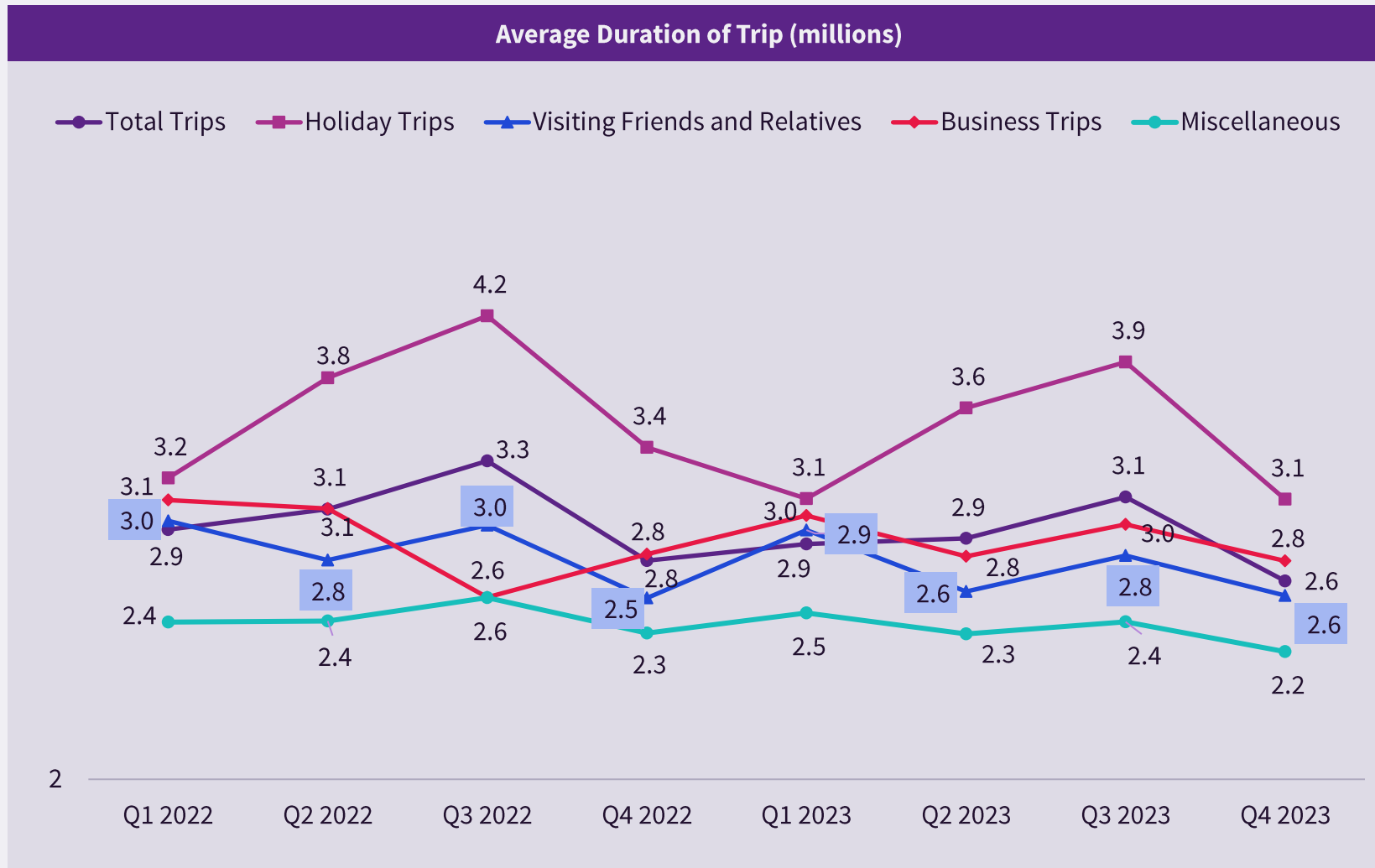


Purpose of Trip	Average Spend GB 2022	Average Spend GB 2023
Total Trips	£259	£266
Holiday Trips	£325	£330
Visiting Friends and Relatives	£170	£172
Business Trips	£321	£365
Miscellaneous Trips	£282	£300

Duration of trips in Great Britain 2023



Average duration of trip by quarter in Great Britain



Purpose 2023	Average Duration 2022	Average Duration 2023
Total Trips	3.0	2.9
Holiday Trips	3.7	3.5
Visiting Friends and Relatives	2.8	2.7
Business Trips	2.9	2.9
Miscellaneous Trips	2.4	2.4