VisitEngland Domestic Tourism Day Visit 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.





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
- England domestic tourism day visits 2021 and 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
- England profile of tourism day 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 England Day Visit Statistics Annual Tables 2021 and 2022
 - England tourism day visit spend breakdown 2022







Introduction, Methodology, Definitions & Context

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 England. 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 Scotland and Wales are published by <u>VisitScotland</u> and <u>Visit Wales</u> 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 <u>VisitEngland</u> 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. Quarterly reports and detailed data in Excel can be accessed on the VisitEngland website.
- The results for 2021 and 2022 report on different periods of data collection, for 2021 the period is April to December and for 2022 January to December. 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 <u>Great Britain Overnight Tourism Survey (GBTS)</u>, 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 'statistics in development'. More information on this can be found on the Office for Statistics Regulation website.
- This statistical release contains <u>provisional estimates</u>. As part of the 'statistics in development' status, the project is now undergoing a methodological review. Following this review, estimates published in this release will change. Please use caution in interpreting or using the provisional figures published here. Please see our Statement on methodological review available <u>here</u> for more details.
- 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 England regions. The data is weighted to more accurately reflect the population.
- Base sizes are the number of qualifying visits, rather than the number of respondents. Quarterly targets are utilised for Scotland and Wales due to small monthly base sizes.
- Number of 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 VisitEngland website.





Definitions

There are 3 main measures for day visits – 3hr+ Leisure Day Visits (the widest measure), Tourism Day Visits (the standard measure and the focus of this report) 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:



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



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.



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)



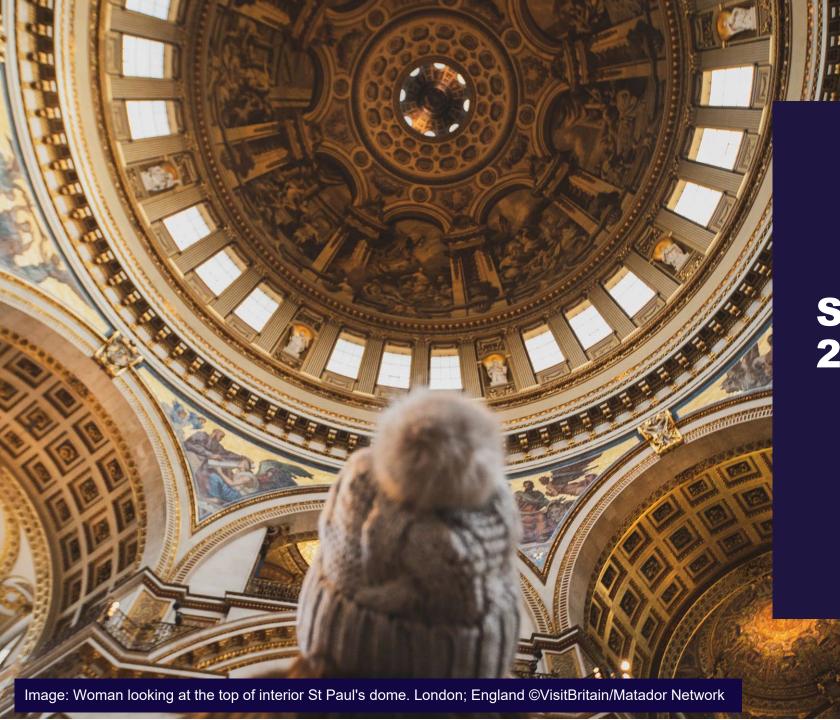


Context

- 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 2021 and 2022

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.

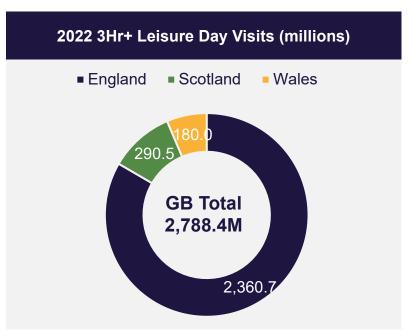
- There were 2.8 billion leisure day visits (lasting 3 hours or more) in Great Britain in 2022. Of these, 1.1 billion were tourism day visits. Tourism day visits increased by 42% in 2022, when comparing April to December 2021 and April to December 2022. 373.1 million day visits were taken specifically for activities core to tourism (i.e. visitor attractions) in 2022.
- Spend on tourism day visits to Great Britain also rose in 2022 to £45.0 billion, an uplift of 46%, which may reflect rising inflation.
- Cross-nation travel significantly decreased for tourism day visits in 2022. There was a 7 percentage point drop in the proportion of visits by England residents to Scotland and a 10 percentage point fall in visits by England residents to Wales.
- There were 945.0m tourism day visits in England in 2022, an increase of 41%, when compared to 2021. Similarly, spend on tourism day visits rose by 47% in the same time period, to £38,740m.
- Visits in England are overwhelmingly made by England residents, however, day visits by Scotland and Wales residents do have a higher average spend at £79 and £60 respectively, versus £40 per day visits by England residents. The most popular regions in England for day visits are London, South East and the North West, although, visits to the North West dropped by 3% in 2022.
- As with all nations, and similar to overnight trips, days visits to cities and large towns represented the largest proportion of visits and spend in England. The proportion of spend in the countryside / village in England increased by 4 percentage points in 2022, despite the proportion of visits to this location type declining slightly.
- 1 in 5 tourism day visits in England included food, drink or speciality shopping, there was a 65% increase in visits with these activities in 2022. As with day visits to Scotland and Wales, organised public events experienced a significant uplift in 2022 (+73%) due to the return of the events sector following COVID-19.
- In 2022, the majority of day visits in England involved travelling more than 20 miles. In contrast to other nations, there was no significant change in the distance travelled or in how long the visits lasted, however there was a 6 percentage point increase in the proportion that just visited one place. This trend towards just visiting one location is evident for all nations, and also for overnight trips.
- Private motor vehicles were used for the majority of tourism day visits in 2022, this increased by 3 percentage points when compared to 2021. There was a 3 percentage point decrease in the proportion of visits that used a train, underground or tram. This decline in England was a lot less acute than in Scotland (which experienced a 10pp decrease) and may simply be the result of increased car ownership (+3pp).
- Transport and food and drink represented the majority of day visit spend in England in 2022. While there was no movement in the proportion of spend for overnight trips, for day visits, spend on transport costs increased (+2pp), while the proportion of spend on speciality shopping dropped (-2pp) in 2022. Speciality shopping is potentially being sacrificed due to the rising costs of essentials such as transport and food.

Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





2022 Great Britain tourism day visit 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%	

Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





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. Overall, 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	1,086.2	
England	945.0	87%
Scotland	94.8	9%
Wales	62.0	6%

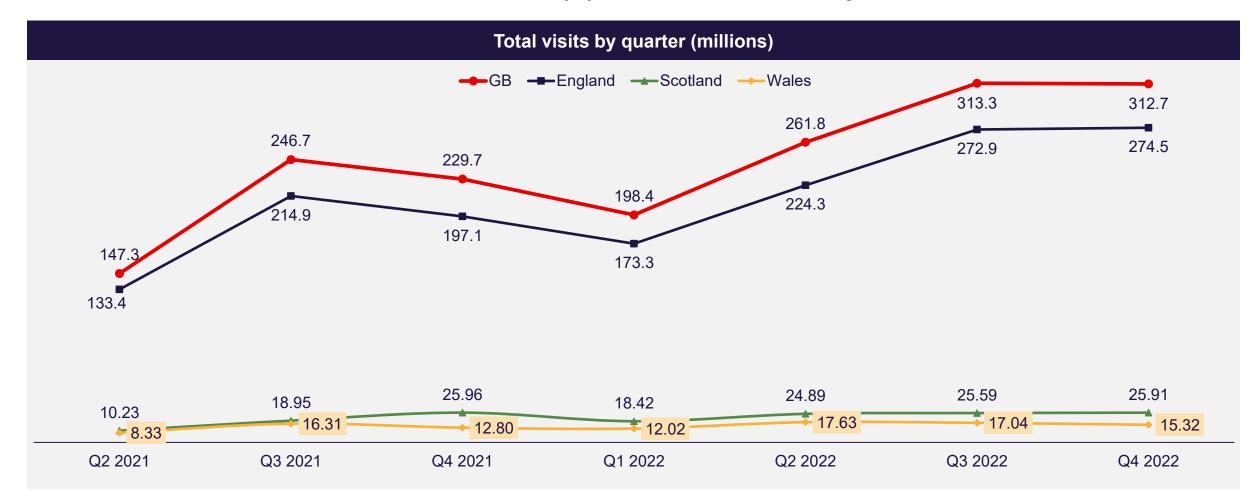
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Tourism day visits by quarter 2021-2022

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



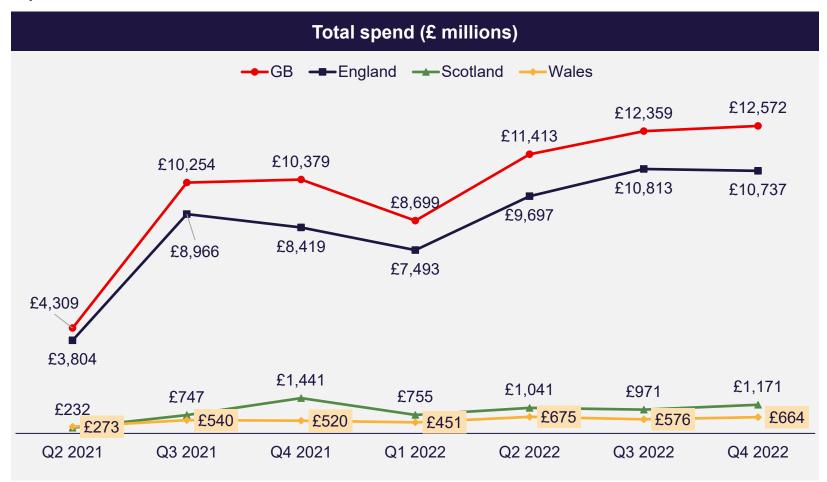
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Tourism day visit 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 2024 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%

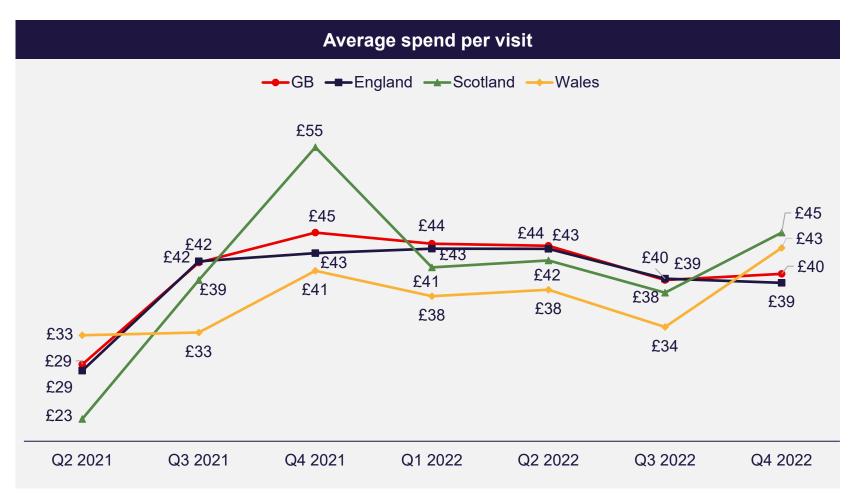
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Tourism day visit average spend per visit 2021-2022

Average spend per visit 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

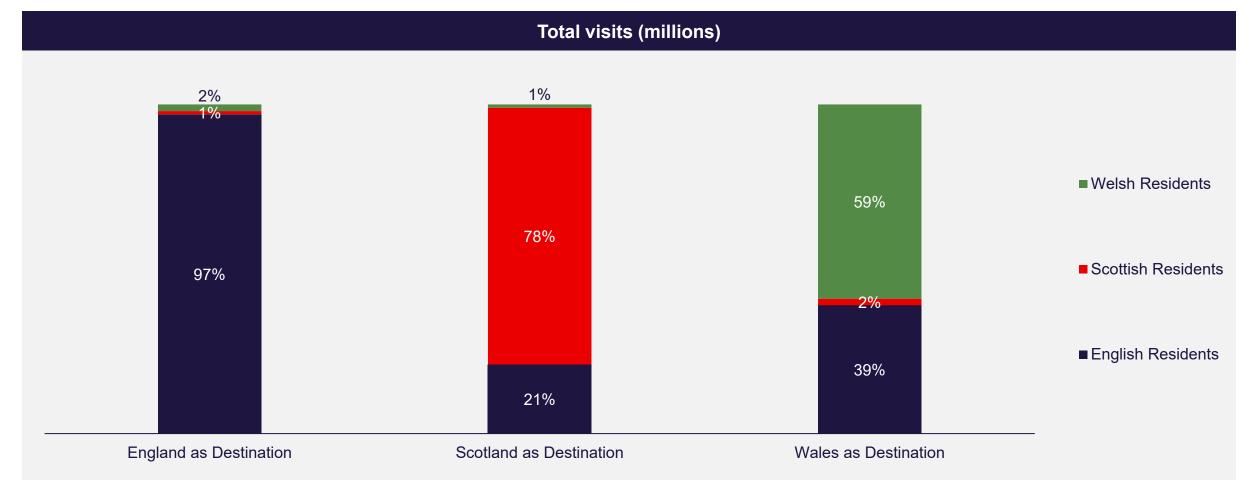
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits

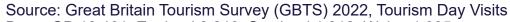




Nation of residence by nation of destination in 2022

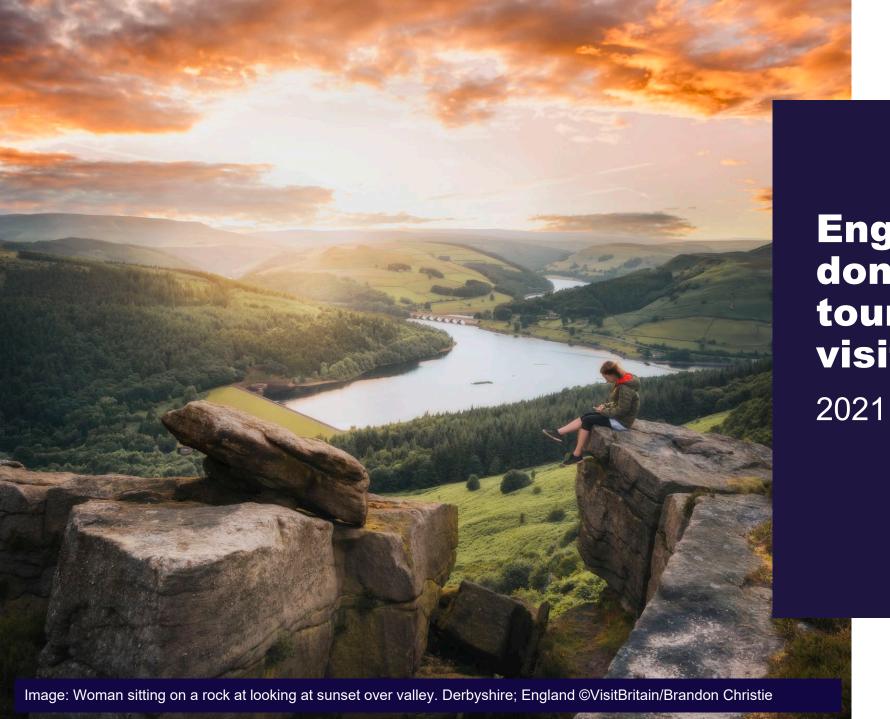
Day visits are much more nation centric than overnight trips; almost all tourism day visits in England were taken by England residents. Scotland residents mostly visited Scotland. Wales, as with overnight trips, experienced the most cross-nation visits. Interestingly, when compared to 2021 (April to 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.











England domestic tourism day visits

2021 and 2022

Summary of tourism day visits in England in 2022







Average spend per visit			
Q1 2022	£43		
Q2 2022	£43		
Q3 2022	£40		
Q4 2022	£39		



Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits



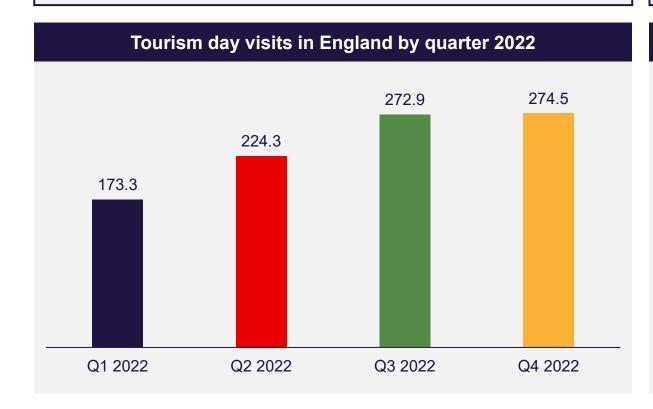


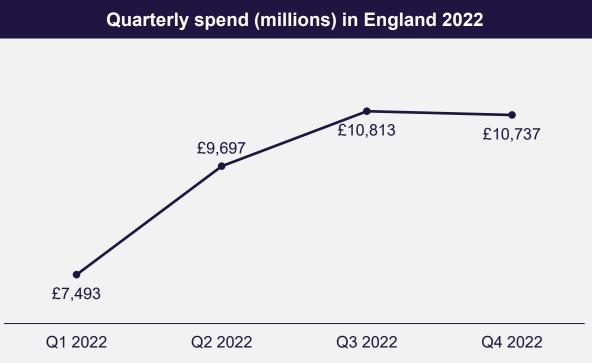
Tourism day visits and spend in England 2022

Tourism day visits in England in 2022 (April to December) increased by 41%, when compared to 2021 (April to December). Similarly, spend on tourism day visits increased by 47% in the same time period. Q3 and Q4 experienced the most visits and spend in England, however, Q1 and Q2 recorded the highest average spend. Spend in Scotland and Wales dipped in Q3 2022, but was highest for England in this quarter.



£38,740m





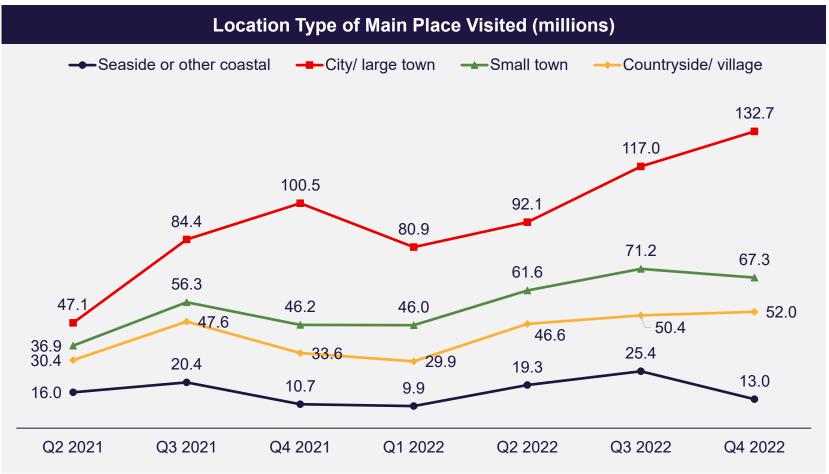
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Location type of main place visited

Almost half of day visits in England in 2022 were to cities and large towns, these visits peaked in Q4 2022 and were 47% higher than in 2021. In contrast to Scotland, small towns experienced a 44% increase in visits in England and weren't displaced by visits to cities and large towns. There was a 2pp decrease in the proportion of visits to the seaside / coastal locations. This trend is across overnight and day visits, is evident for all nations and may be related to the return of international travel.



Location Type	Visits 2022 (millions)	Share of England visits	
Seaside or other coastal	67.5	7%	
City / large town	422.7	45%	
Small town	246.1	26%	
Countryside / village	178.9	19%	
Other / Unspecified	29.8	3%	

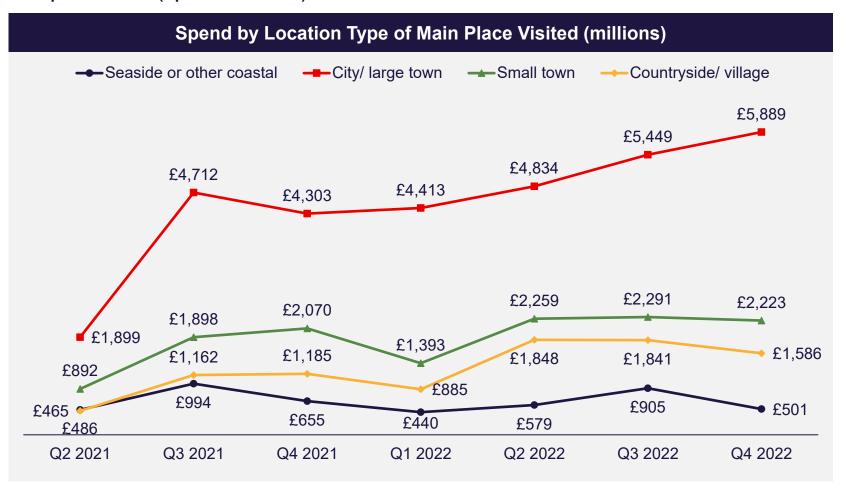
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Spend by location type of main place visited

As with all nations, days visits to cities and large towns represented the majority of spend in England, and similar to overnight trips in England, Q4 2022 reported highest spend in these location types. There was a significant increase in spend in countryside / village in 2022 (April to December) when compared to 2021 (April to December).



Location Type	Spend 2022 (millions)	Share of England Spend	
Seaside or other coastal	£2,424	6%	
City / large town	£20,585	53%	
Small town	£8,165	21%	
Countryside / village	£6,160	16%	
Other / Unspecified	£1,406	4%	

Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits

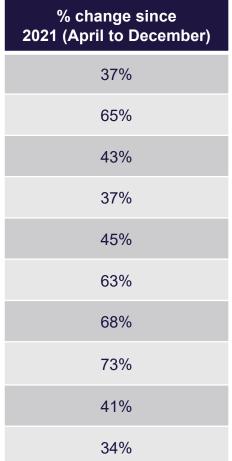




Activities undertaken on tourism day visits 2022

1 in 5 tourism day visits in England included food, drink or speciality shopping, there was a 65% increase in visits with these activities in 2022. As with day visits to Scotland and Wales, visits that included organised public events experienced a significant uplift in 2022 (+73%) due to the return of the events sector following COVID-19.





Source: Great Britain Tourism Survey (GBTS) 2022, Tourism

Day Visits

Base: England 8,219

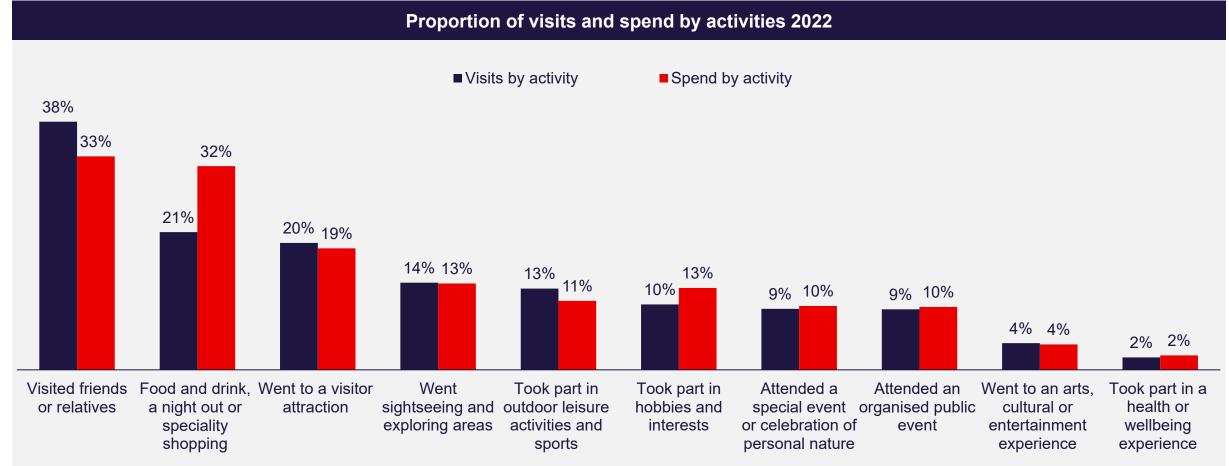
NOTE: Slide shows the proportion of visits which involved each activity, it adds up to more than 100% as more than one activity could be undertaken on a visit.





Visits and spend by activity 2022

Visits that included food and drink, night out or speciality shopping represented just 1 in 5 visits, but accounted for 32% of visit spend in England. There was a decrease of 5 percentage points in the proportion of visit spend where the activities included sightseeing and exploring areas in England. The proportion of spend on visits that included hobbies and interests increased by 2 percentage points in 2022, and average spend for these visits was £51, compared to £41 for day visits in England more generally.



NOTE: Slide shows the proportion of visits and spend which Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visit Nolved each activity, it adds up to more than 100% as more than one activity could be undertaken on a visit.



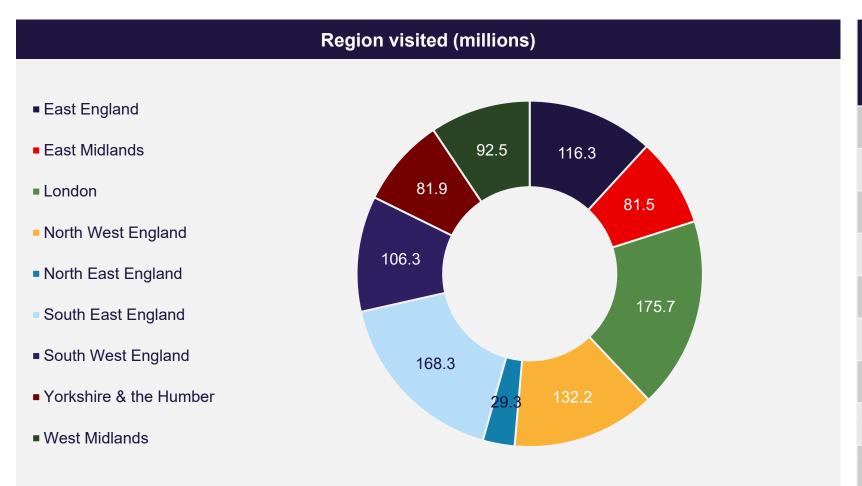




England Profile of visits 2022

Visits and spend by region visited 2022

North West England is the 3rd most popular day visit destination in England, following London and the South East. Although there was no significant change in the proportion of day visits to the South West, the proportion of spend in this region dropped by 3pp in 2022 (April to December).



Region	Share of England Visits 2022	Share of England Spend 2022
East England	12%	9%
East Midlands	9%	8%
London	19%	21%
North West England	14%	16%
North East England	3%	4%
South East England	18%	15%
South West England	11%	10%
Yorkshire & the Humber	9%	8%
West Midlands	10%	10%

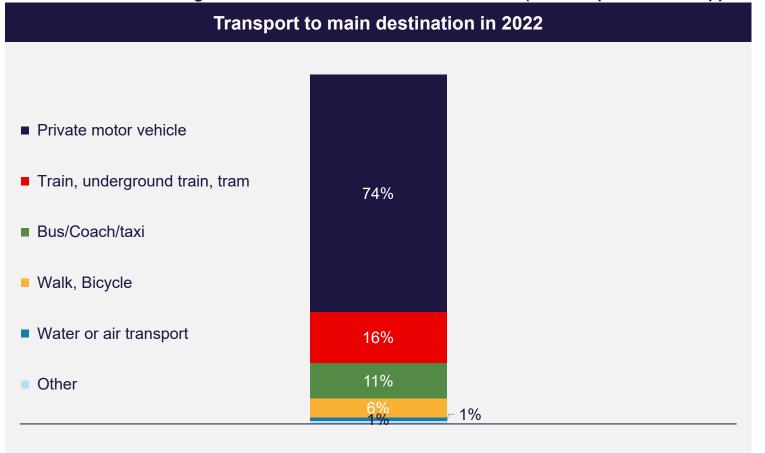
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits



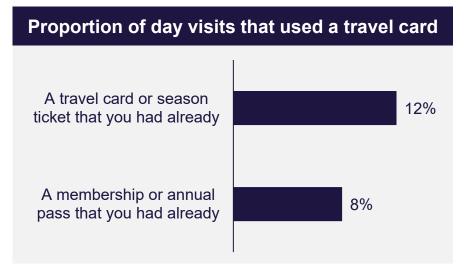


Transport used 2022

Private motor vehicles were used for the majority of tourism day visits in 2022, this increased by 3 percentage points when compared to 2021. This is in contrast to overnight trips in England where there was a decrease in use of private motor vehicles on a day visit (-2pp). The proportion of day visits by car owners similarly increased by 3 percentage points. There was a 3 percentage point decrease in the proportion of visits that used a train, underground or tram. This decline in England was a lot less acute than in Scotland (which experienced a 10pp decrease).







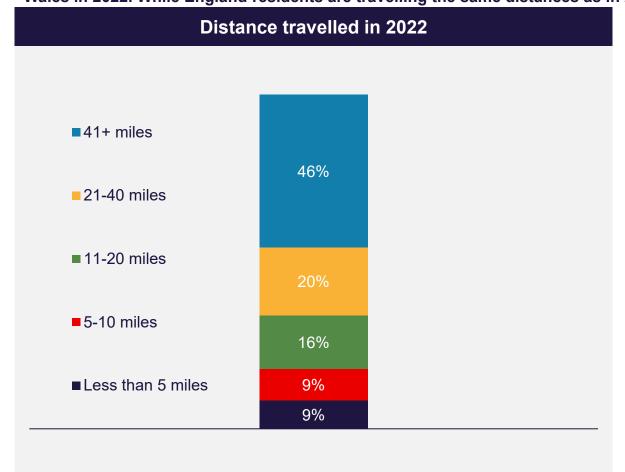
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits



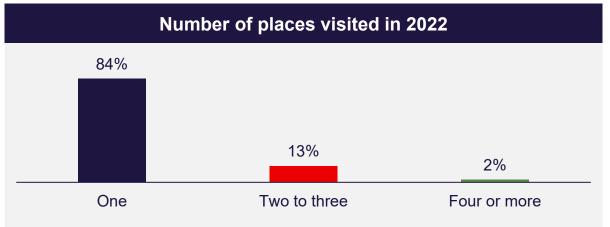


Distance travelled and number of places visited

In 2022, the majority of day visits involved travelling more than 20 miles. When compared to 2021, there was no change in the distance travelled or in how long the visits lasted, however there was a 6 percentage point increase in the proportion that just visited one place. This trend towards just visiting one location is evident for all nations, and also for overnight trips. There was a considerable drop in the proportion of England residents visiting Scotland and Wales in 2022. While England residents are travelling the same distances as in 2021, they're choosing to stay within England in 2022.







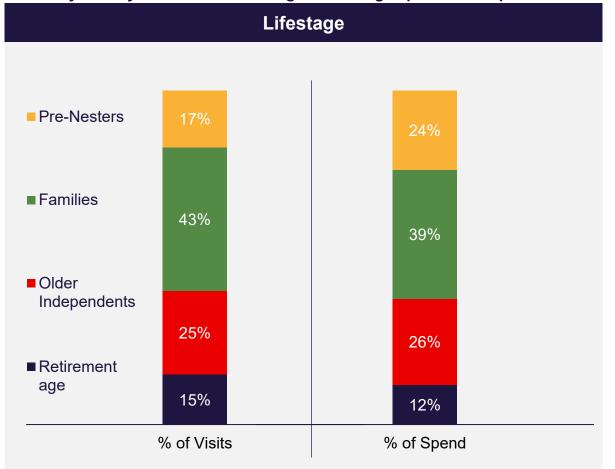
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits

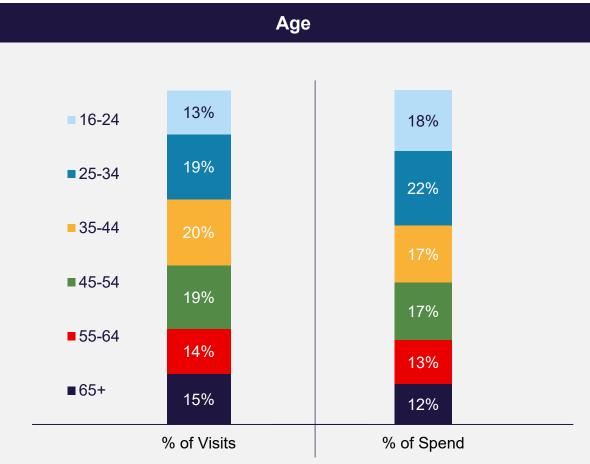




Lifestage and age profile for domestic visits 2022

The highest proportion of day visits in England in 2022 were made by families (43%), however, these day visits have the lowest average spend at just £37, versus £56 per visit for pre-nesters. The profile of day visits in England was largely the same as in 2021, nevertheless, there was a 3 percentage point decrease in the proportion of visits by 16-24 year olds and a corresponding 3 percentage point increase in the proportion of visits with those aged 55+. Day visits by 16-24 year olds have the highest average spend at £57 per visit.





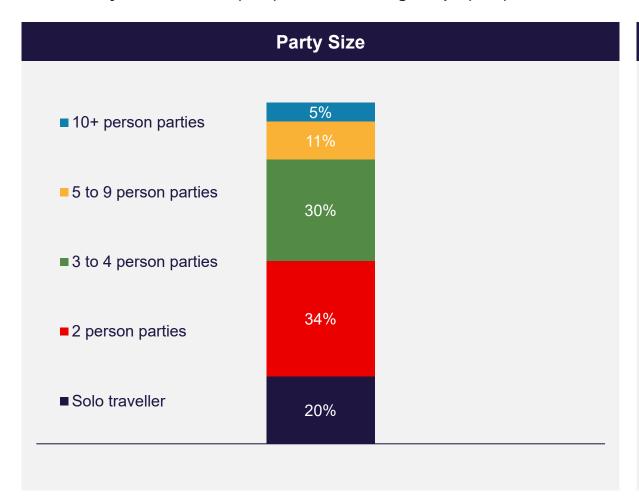
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits

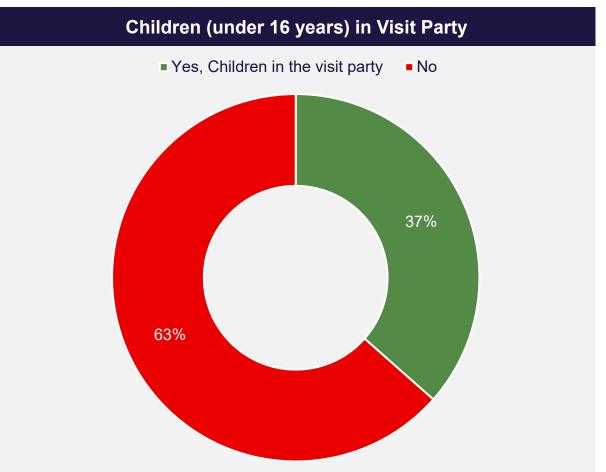




Visit party size 2022

The majority of day visits in England in 2022 had a party size of 2 or less, this is unchanged since 2021 (April to December). 4 in 10 day visits include children in the visit party, again there was no change in the proportion of children in the day visit party for England. Day visits in England are less likely to be taken by solo travellers (20%) than are overnight trips (24%).





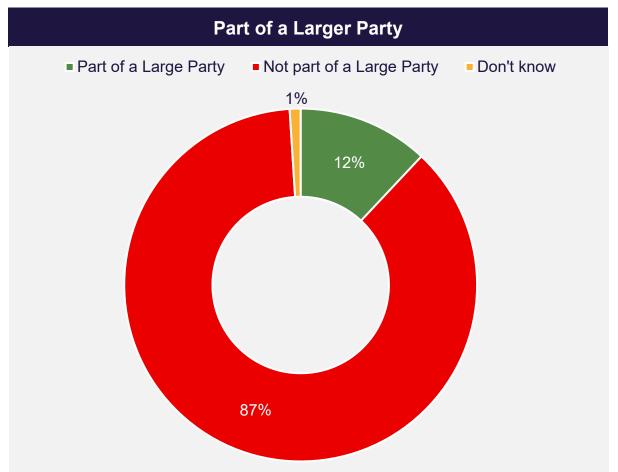
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits

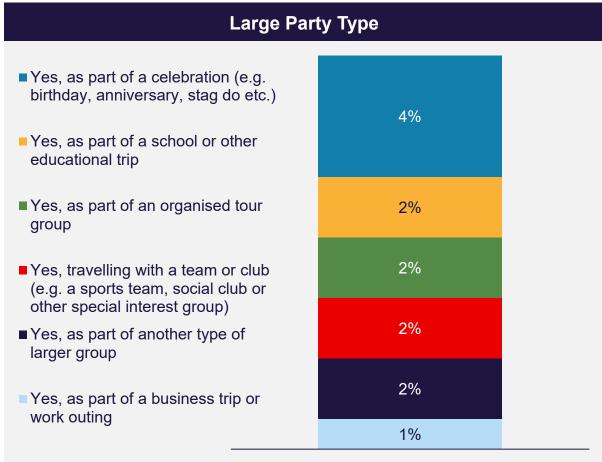




Visit party composition 2022

1 in 8 day visits in England were part of a larger group (e.g. a coach party, tour group, school trip) in 2022, which is unchanged, when compared to 2021. Celebrations were the most popular type of large group visit. There was a 2 percentage point decrease in the proportion of visits travelling with a team or club in 2022, but a 9 percentage point decrease for those aged 16-24 years. This might account for the decrease in visits with 16-24 year olds more generally.





Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Visits and spend by region of residence 2022

Visits in England were overwhelmingly made by England residents. However, day visits by Scotland and Wales residents had a higher average spend (£79 and £60 respectively) than England residents (£40 per visit). South East and London residents represented the largest proportion of visits and spend in England. Although there was a 2 percentage point drop in the proportion of visits and spend by London residents in 2022 (April to December).

Total visits	Visits	Share of England visits	Spend	Share of England spend	Spend per Visit
Net: England	917.4	97%	£36,877	95%	£40
East England	114.6	12%	£4,119	11%	£36
East Midlands	79.0	8%	£2,726	7%	£35
London	155.9	16%	£6,372	16%	£41
Northwest England	113.2	12%	£5,166	13%	£46
Northeast England	38.5	4%	£1,497	4%	£39
Southeast England	169.6	18%	£7,311	19%	£43
Southwest England	79.9	8%	£2,807	7%	£35
Yorkshire & the Humber	79.2	8%	£2,985	8%	£38
West Midlands	87.1	9%	£3,879	10%	£45
Rest of England (not London)	761.5	81%	£30,505	79%	£40
Net: Scotland	10.7	1%	£841	2%	£79
Net: Wales	17.0	2%	£1,021	3%	£60

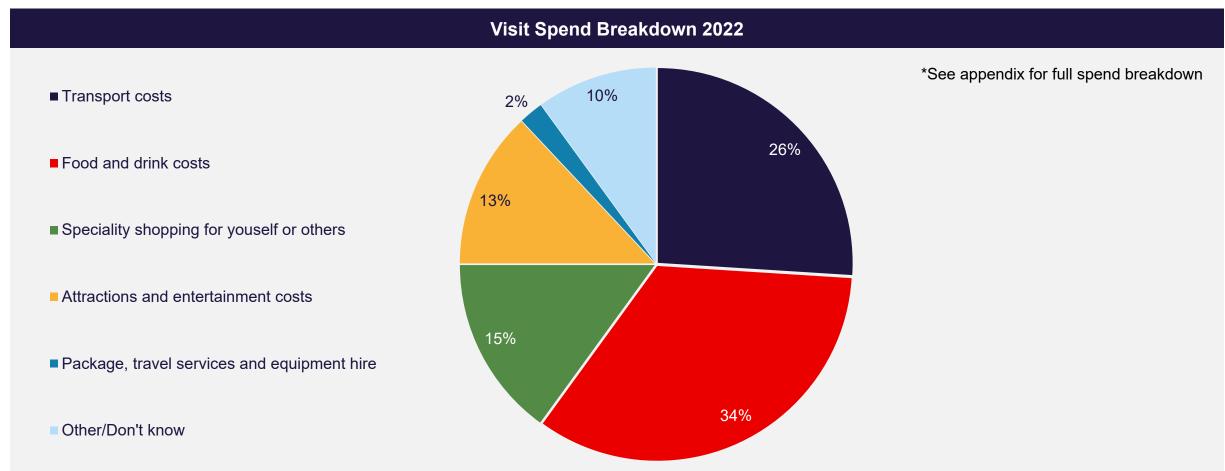
Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Visit spend breakdown 2022

Transport and food and drink represented the majority of day visit spend in England in 2022. While there was no movement in the proportion of spend for overnight trips, for day visits, spend on transport costs (+2pp) and eating and drinking out (+2pp) increased. The proportion of spend on speciality shopping dropped (-3pp) in 2022, potentially being sacrificed due to the rising costs of essentials such as transport and food.



Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Average spend on tourism day visits

Average spend on the majority of tourism day visits was £40 or less. 1 in 8 spent nothing at all, these day visits were mostly to see friends and relatives. However, 10% 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 old's and taking part in activities such as food, drink, a night out or speciality shopping.



Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits







Domestic Day Visits: Annual Data Tables

Please click on the paper clip image to view the file.

April to December 2021 data tables

January to December 2022 data tables









Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits





Visit spend breakdown 2022 for England

Total visits	Spend	Share of England Spend
Net: Transport costs	£9,906	26%
Road transport – bus fares, taxi fares, car parking	£2,085	5%
Road transport – all fuel bought during your trip (i.e. not before the trip)	£4,556	12%
Rail, tube or tram transport (e.g. tickets)	£1,884	5%
Water transport (e.g. ferry tickets)	£172	0%
Air transport (e.g. flight tickets)	£685	2%
Hiring a car or other vehicle	£524	1%
Net: Food and drink costs	£13,047	34%
Eating and drinking out (e.g. cafes, restaurants, bars)	£9,900	26%
Food / drink bought in a shop, market stall or takeaway and consumed during the trip	£3,147	8%
Speciality shopping for yourself or for others	£5,811	15%
Net: Attractions and entertainment costs	£5,082	13%
Entrance to visitor attractions (including museums, galleries, historic monuments)	£2,033	5%
Tickets / entrance to events, shows, clubs etc. (e.g. theatre, cinema, nightclubs)	£2,125	5%
Tickets to watch sporting events	£594	2%
Entrance to sports / leisure centres	£329	1%
Net: Package, travel services and equipment hire	£712	2%
Package travel or package tours	£287	1%
Other travel services (e.g. brochures, guided tours)	£205	1%

Source: Great Britain Tourism Survey (GBTS) 2022, Tourism Day Visits



