

DOMESTIC OVERNIGHT TRIP PROFILE

2017-2019 AVERAGE ANNUAL FIGURES

DOMESTIC OVERNIGHT TRIPS, 2017-19 ANNUAL AVERAGES

This short report provides bite-size insight into overall trends in domestic overnight tourism by examining the travelling behaviour of visitors in different “life stages” (based on age and children in household) between 2017 and 2019:

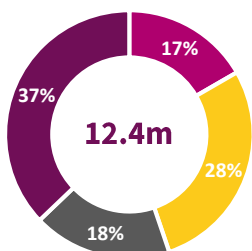
- Pre-Nesters – aged 16-34, no children
- Families – aged 16-54, with children
- Older Independents – aged 35-54, no children
- Empty Nesters – aged over 55

While these categories are generic, they can reveal overnight tourism patterns which improve our understanding of the domestic market. The segments in this report **do not** represent a trip’s party composition – e.g. a trip by a 37-year-old parent is counted as one family visit; a trip by two adults with two children is counted as four family visits.

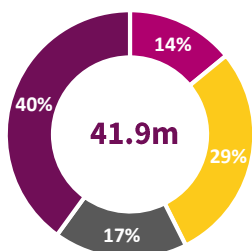
	Pre-Nesters	Families	Older Indep.	Empty Nesters
Overnight Visits	2.1m	3.5m	2.2m	4.6m
Nights	5.9m	11.9m	7.3m	16.7m
Overnight Spend	£510m	£735m	£595m	£1,141m
Average length of stay	2.8 nights	3.4 nights	3.3 nights	3.6 nights
Average spend per day	£87	£62	£82	£68
Average spend per visit	£247	£211	£265	£248

Source: GBTS, 2017-19.

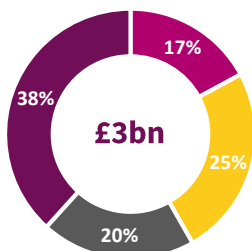
OVERNIGHT TRIPS



NIGHTS



OVERNIGHT SPEND



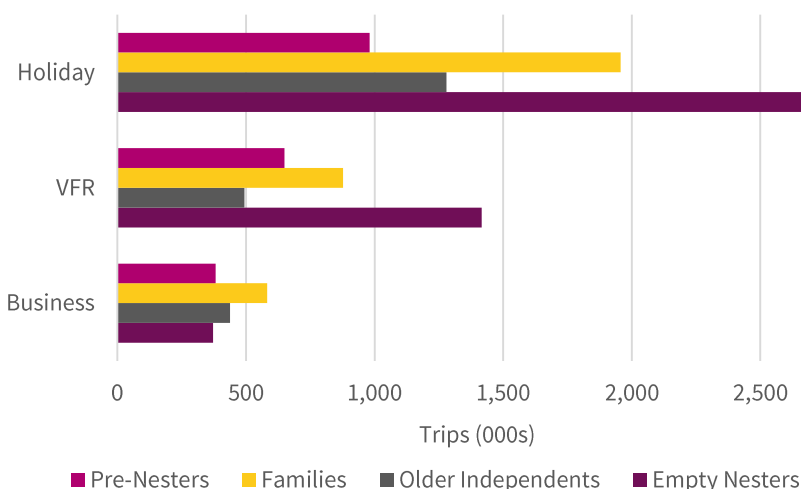
■ Pre-Nesters ■ Families ■ Older Independents ■ Empty Nesters

Source: GBTS, 2017-19.

“Empty nesters” travel the most in Scotland, generating 37% of all domestic overnight visits and 38% of all domestic spend between 2017 and 2019. At 3.6 nights per trip, their average length of stay is the highest across all “life stages” (8% above the national average).

Families account for the second-highest number of trips and expenditure, despite their lower average spend. While “pre-nesters” and “older independents” do similar amounts of travelling, the latter tend to stay a bit longer and spend more money during their trip.

PURPOSE OF TRAVEL



Source: GBTS, 2017-19. VFR= visiting friends or relatives. Excludes a small proportion of trips made for other reasons (2.1% of all).

Visitors from all “life stages” travel mostly to go on a holiday (56% of all visits). The second most popular reason to make an overnight trip is to visit friends or relatives (28%), followed by business trips (14%).

“Empty nesters” make the most holiday trips, and these account for three in five overnight journeys they undertake. “Pre-nesters”, on the other hand, travel the least to have a holiday break (less than half of their trips), but have the highest proportion of VFR trips – one in three. Family and “older independent” trips are not too different in terms of purpose of travel. Families tend to visit friends and relatives more, while “older independents” have a higher proportion of business trips.

VISITORS' COUNTRY OF RESIDENCE

Roughly half of all domestic overnight trips in Scotland between 2017 and 2019 were undertaken by residents of Scotland (50.6%), and the other by residents of England and Wales (49.4%).

“Empty nesters” living in Scotland made the most trips – about a fifth more than “empty nesters” residing in the rest of Great Britain. The visitor profile of travellers from England and Wales is characterised by a slightly higher proportion of “pre-nesters” and families. There is no significant difference in the number of trips undertaken by “older independents” based on their country of residence.

Country	Pre-Nesters	Families	Older Indep.	Empty Nesters
Scotland	1m	1.7m	1.1m	2.5m
England and Wales	1.1m	1.8m	1.1m	2.1m

Source: GBTS, 2017-19.

VISITORS' REGION OF RESIDENCE (ENGLAND)



Source: GBTS, 2017-19.

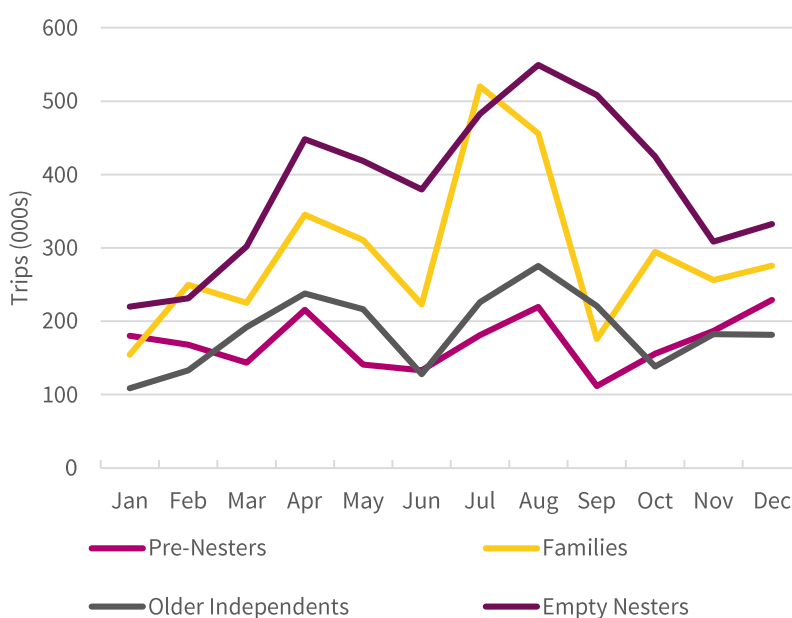
From all of England’s regions, residents of the North West make the highest number of overnight trips to Scotland across all visitor “life stages”. Nevertheless, there are noticeable demographic variations in the typical visitors from each region.

Visitors from the North of England and Yorkshire are predominantly “empty nesters”, and a similar trend can be observed in trips made by residents of the South East and South West. Travellers to Scotland from England’s Midlands are mostly families. This also applies to the East of England which has the highest proportion of “older independent” trips across all of England’s regions. London is the only region where “pre-nesters” travel the most to Scotland, undertaking one in three of all outbound trips north.

SEASONALITY

Similarly to day trips, roughly a quarter of all overnight trips to Scotland made by British residents occur between April and June, and another quarter between October and December. The proportion of summer trips is higher (32% of all), while the first three months of the calendar year are less popular for travelling (19% of all trips).

As the chart shows, visitors of all “life stages” prefer to travel in the summer, but there are some monthly variations. “Pre-nesters” have the most even annual distribution of trips which peak in December, partly due to the high proportion of VFR trips. Visits of “older independents” follow a similar pattern, with slightly more prevalent travel in the second and third quarter on the year. The number of family overnight trips peaks in April, July, August and October which matches with Easter and the annual school holidays. “Empty nesters” travel the most throughout the year, but prefer the April-October period for their overnight stays.

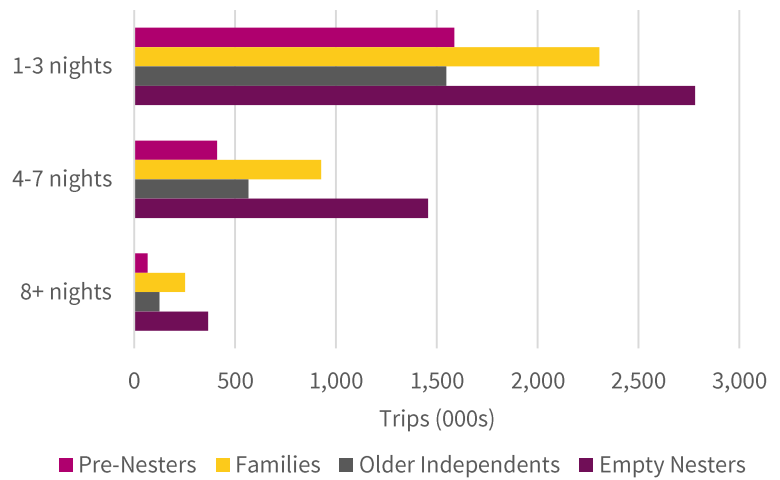


Source: GBTS, 2017-19.

DURATION OF STAY

Two-thirds of all domestic overnight trips in Scotland between 2017 and 2019 lasted up to three nights; just over a quarter were between four and seven days long, and only 7% were longer than a week.

Short breaks are the predominant choice of visitors of all “life stages”, but even more so of “pre-nesters” and “older independents”. In terms of duration, overnight trips of families are identical to the average for all visitors. “Empty nesters” are more likely to take long holidays domestically, and they account for nearly half of all trips that lasted more than seven days.



Source: GBTS, 2017-19.

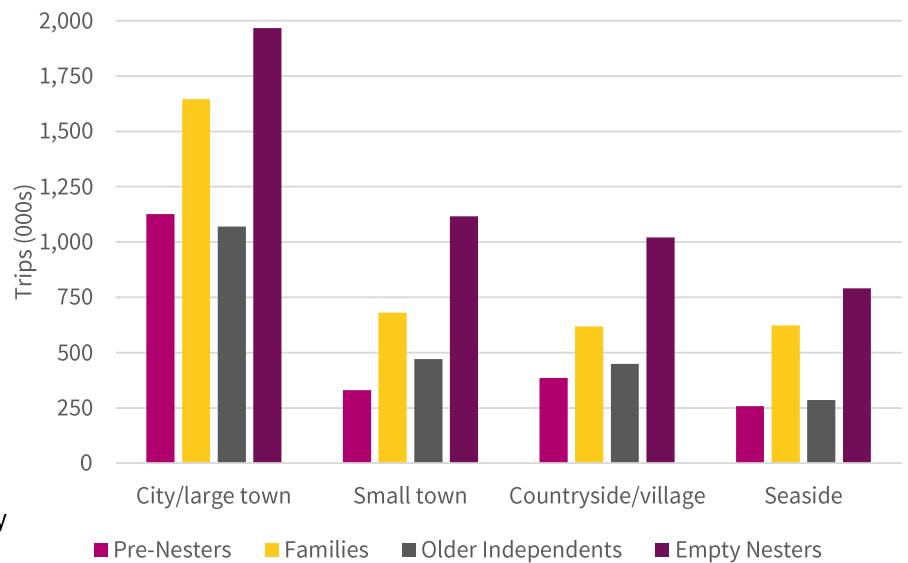
TYPE OF PLACE VISITED

Cities and large towns are the top type of destination for visitors of all “life stages”, attracting nearly half of all domestic overnight trips between 2017 and 2019.

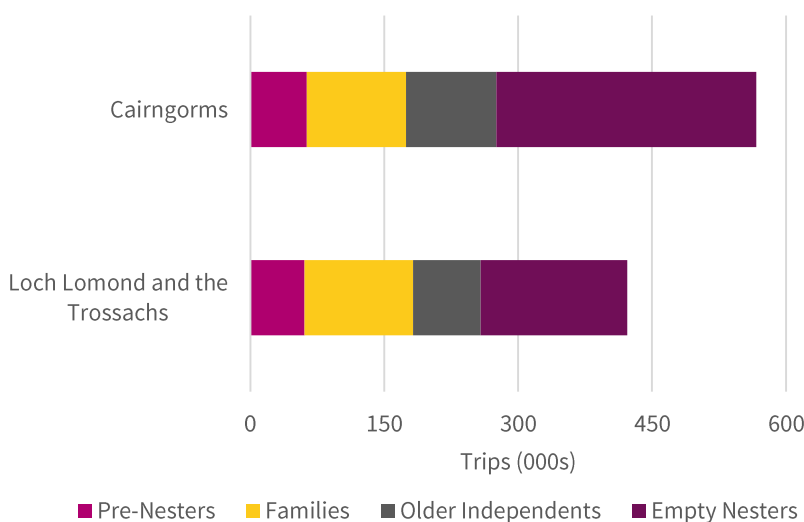
“Pre-nesters” have the highest proportion of city/large town trips (54% of all their overnight visits). Unlike other visitors, they travel more to countryside than to small-town locations.

Overnight trips of families and “older independents” follow a similar pattern in terms of destination type, but families are more likely to undertake a seaside trip.

“Empty nesters” account for the highest number of trips to each type of location. They have the lowest proportion of city visits and the highest proportion of small-town and countryside visits across the four segments.



Source: GBTS, 2017-19.



Source: GBTS, 2017-19.

NATIONAL PARKS VISITED

National parks were the main or one of the main destinations for one in twelve domestic overnight trips in Scotland between 2017 and 2019. Most national park visits are made by “empty nesters” who accounted for nearly half of all such trips over the same period.

With over half a million overnight visits per year between 2017 and 2019, the Cairngorms attracted 33% more visitors than Loch Lomond and the Trossachs National Park. The “life stage” breakdown of trips reveals that this is mostly due to the significantly higher number of “empty nester” trips.

TRIPS TO SCOTLAND'S REGIONS

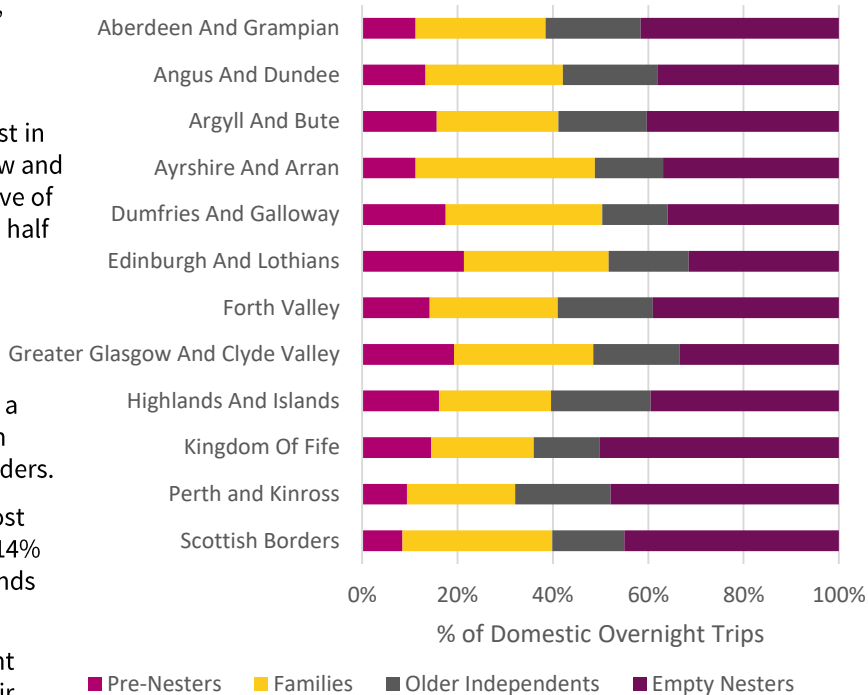
Domestic visitor profile based on “life stage” differs significantly across the regions of Scotland.

The proportion of “pre-nester” trips is highest in Edinburgh and Lothians and Greater Glasgow and Clyde Valley where they account for one in five of all domestic trips. The two regions attracted half of all overnight visits made by “pre-nesters” between 2017 and 2019.

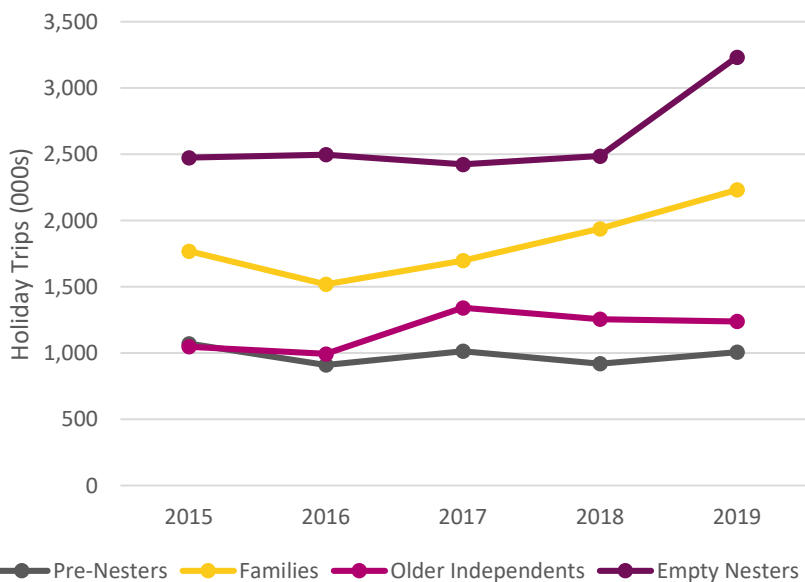
Families are the predominant travellers to Ayrshire and Arran, generating 38% of the overnight trips to the region. They also form a very major part of the domestic visitor mix in Dumfries and Galloway and the Scottish Borders.

The share of “older independent” trips is most consistent across the regions, varying from 14% to 21% of all visits. It is highest in the Highlands and Islands.

“Empty nesters” generate the most overnight visits in nearly every region of Scotland. Their trips are most essential for tourism in Fife and Perth and Kinross, where they account for half of all domestic overnight visits in 2017-2019.



Source: GBTS, 2017-19. For specific visitor numbers, please refer to VisitScotland’s regional factsheets available on <https://www.visitscotland.org/research-insights/regions>.



Source: GBTS, 2017-19.

HISTORICAL TREND (HOLIDAYS)

Since 2015, annual variations in the volume of domestic holiday travel have been lowest in overnight trips undertaken by “pre-nesters” (just under a million trips per year on average). “Empty nester” holiday trips followed a similar trend between 2015 and 2018 when they were roughly 2.5m per year, but increased significantly by 30% in 2019.

Following a decrease from 2015, the number of family holiday breaks has been steadily growing by 12-15% annually since 2016. Domestic holiday visits made by “older independents” are the only ones to not increase in 2019. After a peak 2017, these decreased by 4% on average over two consecutive years.

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