Domestic tourism: Pre- and post- pandemic trends

11 June 2026

VisitEngland™

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Image: A panoramic view of Dunnottar Castle jutting out from a peninsular into the ocean, at Stonehaven, Aberdeenshire, Scotland. ©Dunnottar Castle/Dunecht Estates

Introduction

Background

- In 2020, the Great Britain Tourism Survey (GBTS) and the Great Britain Day Visits Survey (GBDVS) underwent significant methodology changes, including moving from face-to-face interviewing to an online survey.
- The timing of the methodology change during lockdown meant that it was not possible to conduct the survey face-to-face in a parallel run, meaning data calibration that would allow a continuation of the trend series, was not possible.
- The lack of possibility to calibrate the data meant that **the comparison of domestic statistics pre- and post- pandemic has not been possible**.
- VisitEngland, VisitScotland and Visit Wales commissioned an independent agency Decision House to conduct this analysis of connecting the pre- and post- pandemic domestic tourism data.

Image: Hereford Town and Cathedral on the River Wye, Hereford, Herefordshire.
©Shutterstock Image/Robert Harding

Approach rationale

- This analysis seeks to use all available data to **‘build the bridge’ between pre- and post-pandemic domestic tourism**.
- For the purpose of this analysis, we have used **2019 as the pre-pandemic anchor and 2023 as the post-pandemic anchor**.
- We considered the year 2022, however, this was still impacted heavily by the covid pandemic, especially international travel.
- Domestic tourism trends from 2022 onwards are already tracked by the GBTS.
- The report focussed predominantly on **domestic overnight trips**, with some coverage of **day visits** (where data available).
- This report is primarily focussed on Great Britain and United Kingdom picture. Where possible, additional insights on trends in England, Scotland and Wales is provided.

Image: The Iron Bridge over the River Severn, in Ironbridge Shropshire, UK.

Data sources used in our extensive analysis

- ABTA's Holiday Habits report
- Domestic Sentiment Tracker, ad hoc questions (owned by VisitEngland, VisitScotland and Visit Wales)
- Global Tourism Solution's STEAM reporting available via England Local Visitor Economy Partnerships (LVEP), by VisitScotland and by Visit Wales Local Authorities
- Hotel occupancy reporting via STR
- Lighthouse' short-term rentals data
- UK Caravan and Camping alliance economic benefit reports
- VisitEngland's Visitor Attractions Survey
- Moffat Centre Visitor Attraction Monitor
- Visit Wales' Wales Tourism Business Barometer
- VisitEngland's TripTracker
- Official statistics, such as GBTS and IPS
- Industry opinion pieces and anecdotal feedback from key sectors within the industry

Image: Leaderfoot Viaduct stretching over the River Tweed, surrounded by trees, by Melroseon the Scottish Borders. ©Getty Images/500px/Thomas H Mitchell

Interpreting this report

This report summarises results of our analysis across a range of sources and concludes our interpretation. When reading this report, please consider the following points:

Data source completeness:

- The report is based on data that is either publicly available or that VisitEngland, VisitScotland and Visit Wales have access to.
- We have focussed on sources with consistent methodologies across the key time periods.
- It is possible there are additional available data that we have not accessed.

Source limitations:

- Most data sources are produced for a purpose other than ‘building a bridge’ between 2019 and 2023.
- Therefore, for our objectives we have had to apply our own interpretation to each.
- Each source has its limitations and caveats, which we have listed throughout.

Conclusions:

- The conclusions we present in this report are based on our view of the collective data and summarise results across a range of sources.
- There is no single source that provides standalone proof of the pre- and post-pandemic trend in domestic tourism.

Strength of evidence:

- Each source is labelled with the strength of evidence for our conclusions.
- This is based on a proportion which the source represents within the overall domestic overnight trips and day visits) tourism in Great Britain.
- The levels of strengths are: ‘strong’, ‘moderate’, and ‘weak’.

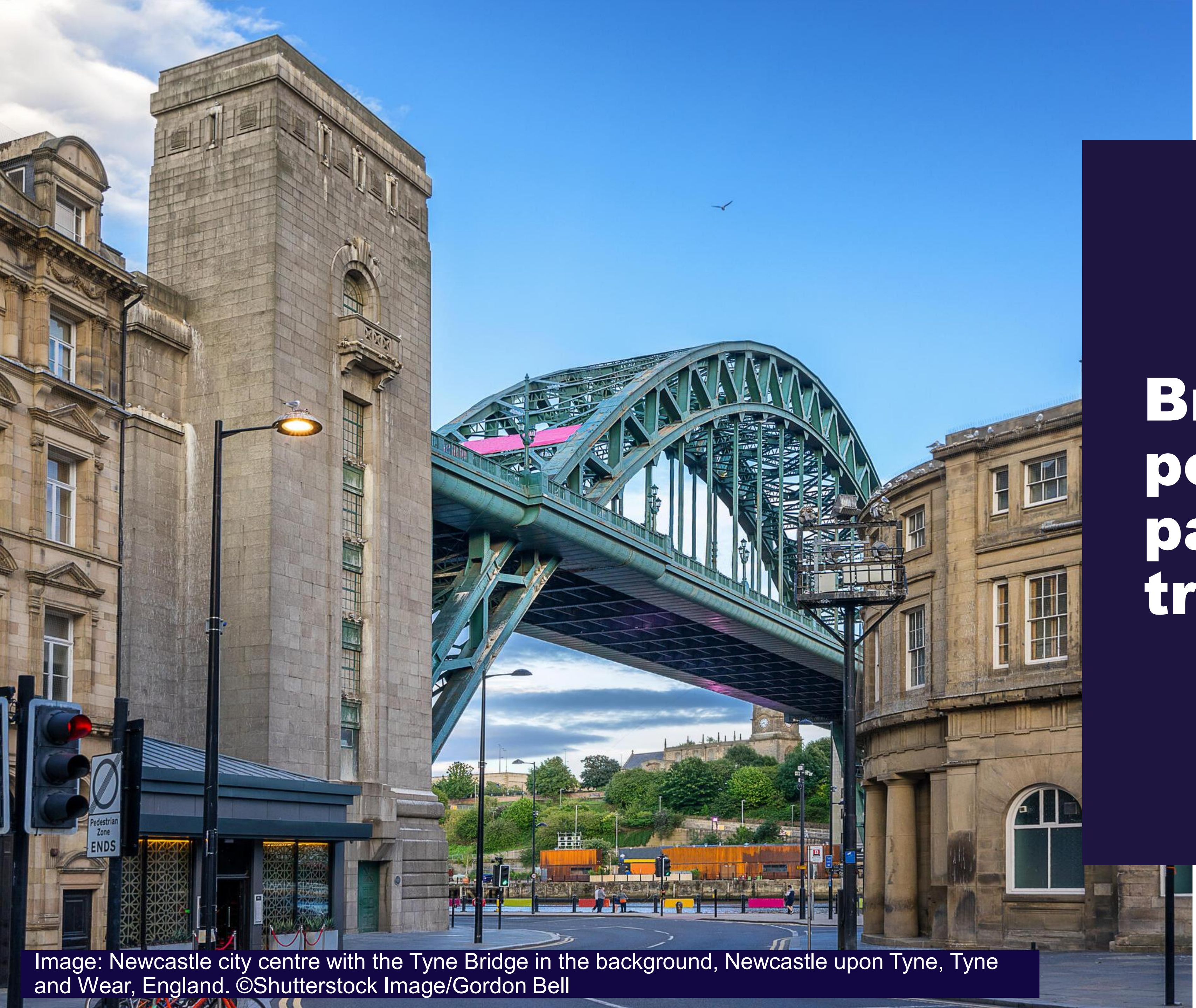


Image: Newcastle city centre with the Tyne Bridge in the background, Newcastle upon Tyne, Tyne and Wear, England. ©Shutterstock Image/Gordon Bell

Broader post-pandemic trends

The story of post-pandemic years

2021 — The start of the return of domestic tourism

Travel restrictions removed from April.

Staycations prioritised over outbound due to ongoing concerns around COVID.

Inbound also affected by low travel confidence.

2022 — The start of the return of inbound tourism

… but also of outbound tourism, especially in summer, which impacted domestic travel.

Cost of living crisis started impacting consumers' travel choices. Travel confidence still low.

2023 — The move towards 2019

Inbound still behind 2019 levels.

Domestic declined:

1. Outbound travel prioritised over domestic.
2. Some domestic overnight trips replaced by day visits.

2024 — The return of inbound, while domestic struggles

Inbound travel reached 2019 levels.

Domestically, 2024 was weaker than 2023 and 2022. Overnight trips and day visits reduced as a result of increased cost within the tourism industry.

2025 — The domestic and inbound volumes start to stabilise

Inbound probably very slightly up* with slow end of year.

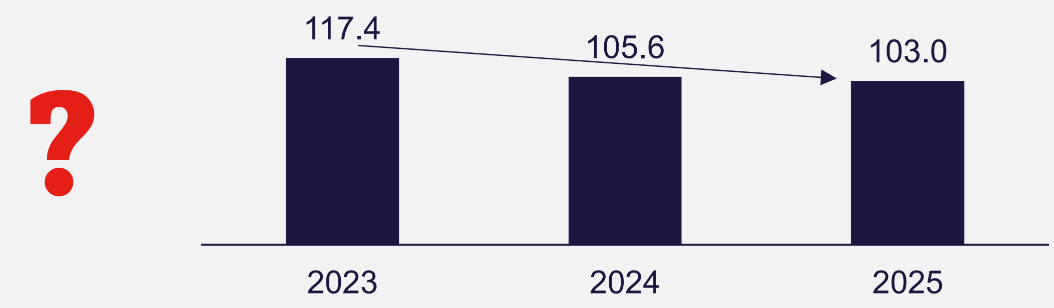
Domestic day trips volume performance appears similar to 2024.

Overnight trips volume very slightly below 2024.

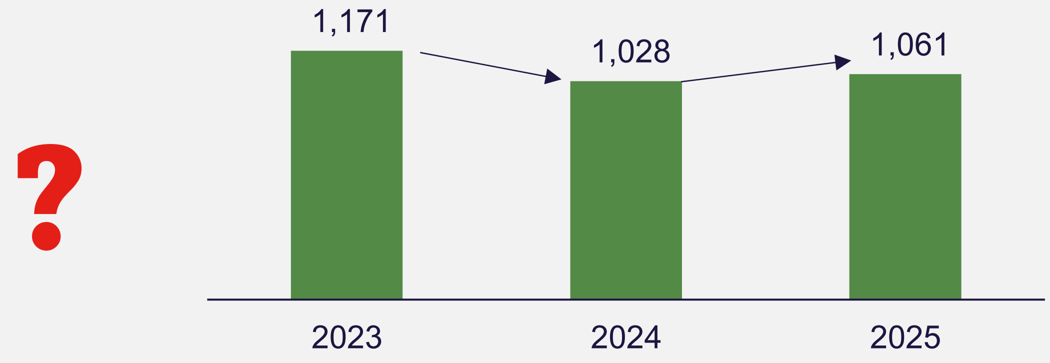
* Note: Inbound data for 2025 not released yet.

From 2023 to 2025 domestic overnight trips have been declining. Domestic day visits in 2024 and 2025 are below 2023. The domestic trend is consistent across nations.

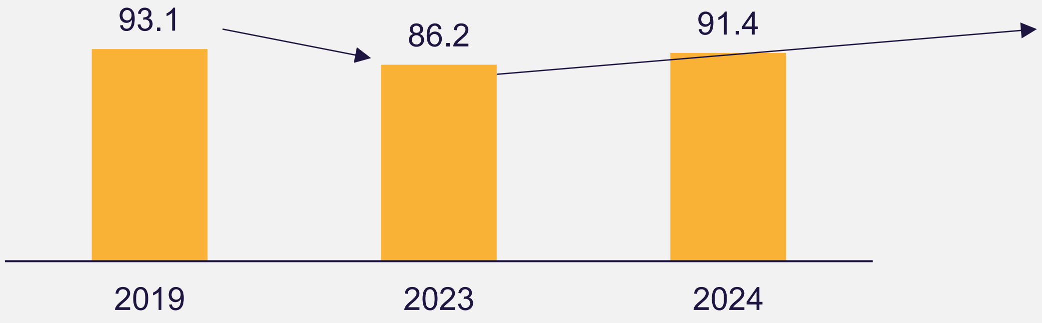
Total GB domestic overnight trips (millions)



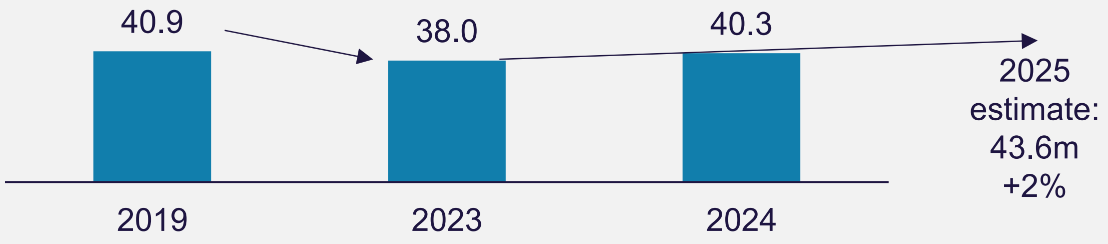
Total GB domestic tourism day visits (millions)



Total UK outbound trips (millions)



Total UK inbound trips (millions)



Source: GBTS and IPS. Note: The method for collecting inbound and outbound visits (via IPS) has remained consistent from 2019 to 2023, therefore, 2019 figure has been provided. Please note that overnight trips are based on all trip purposes.

Image: Two men hiking Ben Nevis responsibly in the summer months when the range is passable. Ben Nevis is the highest mountain range in Britain and visitors can support the maintenance by a voluntary cash contribution to the Nevis Landscape Partnership. Ben Nevis, Highland, Scotland ©Getty Images / Peter Lourenco/Jahama Highland Estate

UK consumers travel behaviour

ABTA's Holiday Habits

- This data is based on an annual survey conducted by ABTA (a trade association for UK travel agents, tour operators and the wider travel industry) among a nationally representative sample of c.2,000 respondents each year.
- Since 2015, the survey has looked at holiday habits in the 12 months prior, including the incidence of domestic overnight holidays.
- This source is a useful gauge of the public's domestic holiday behaviour and plays a key role in framing our conclusions. However, as with other sources, it is not conclusive on its own.
- While it tells us the **proportion of consumers** who have taken a holiday, **it does not provide information on the number of holidays taken during the previous year**, nor the number of nights per trip, or the spend per trip. These missing metrics could paint a more positive or negative picture of domestic overnight tourism.
- It also focusses on trips for a holiday purpose whereas GBTS incorporates all overnight trips. Additionally, the research takes place in July looking back at the last 12 months, meaning that timeframes straddle two years.

Evidence for domestic overnight tourism:

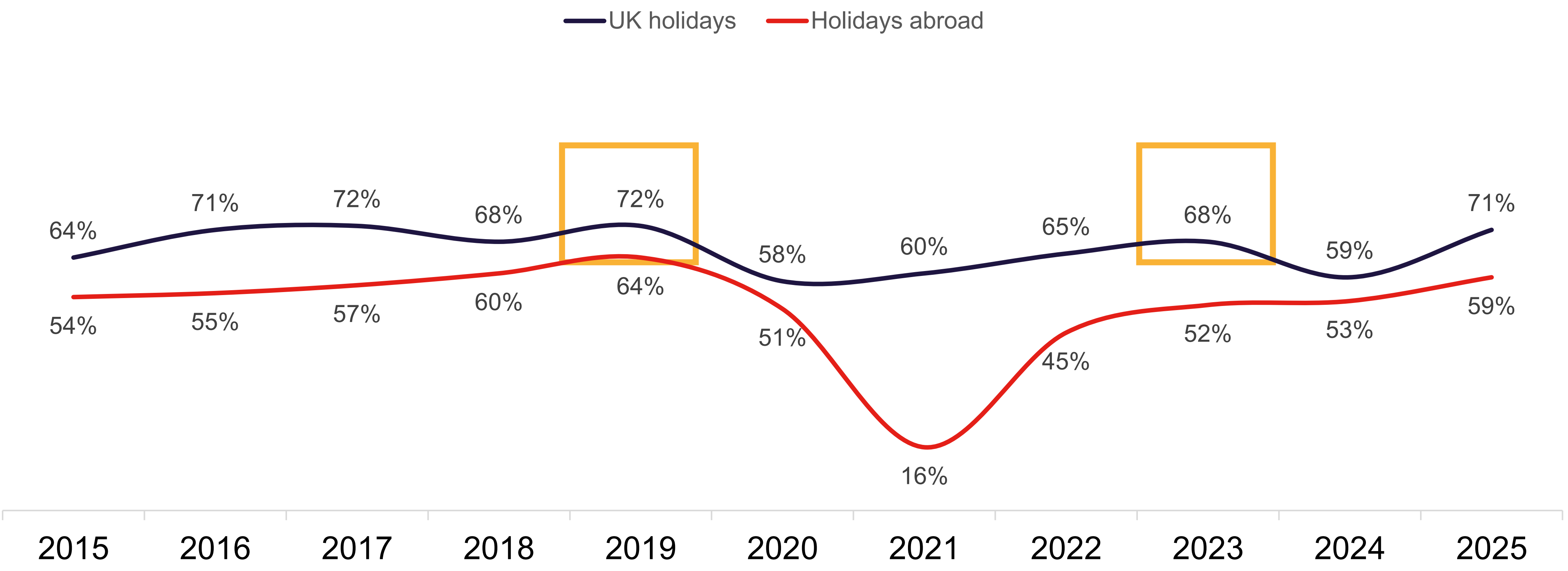
MODERATE

UK coverage, robust and representative sample, consistent source, covering only domestic holidays, no other trip purposes

ABTA's Holiday Habits report suggests a 4% decline in the number of UK residents who took a UK holiday in 2023, compared to 2019.

As alluded to at the start of this section, the percentage of the public taking a domestic holiday does not account for number of nights, or spend, which could paint a more positive or negative picture. However, this source does clearly suggest a decline in domestic trip-taking relative to 2019.

Percentage of people taking holidays in the previous 12 months, Percentage, UK



Source: ABTA Holiday Habits report 2025-26. Data is based on an annual nationally representative survey of c.2,000 UK residents each year.

Domestic Sentiment Tracker ad hoc question

- This data is based on a question added to VisitEngland, VisitScotland and Visit Wales' Domestic Sentiment Tracker - a survey conducted in February 2026 amongst a nationally representative sample of c.1,750 UK adults.
- The question asked respondents if their UK domestic trips in 2025 had increased or decreased relative to 2019, providing further context to help us respond to our objectives.
- However, this question required respondents to accurately remember their behaviour six years ago, and is liable to poor recall, so is included as a supplementary, rather than central, data source.

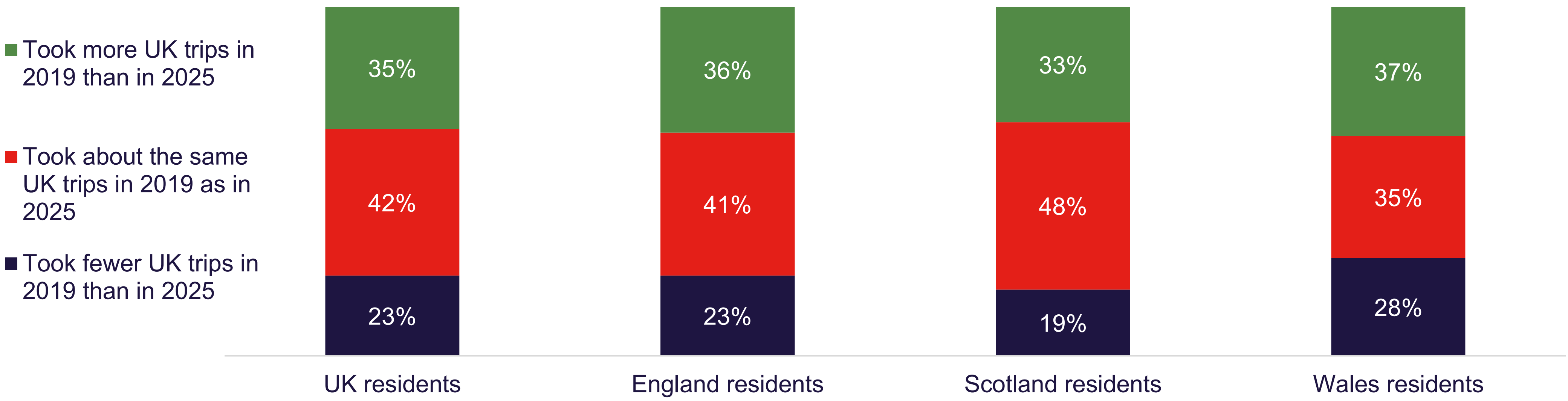
Evidence for domestic overnight tourism:
WEAK

UK coverage, robust and representative sample, relying on respondents' recollection, comparison of 2019 and 2025

Domestic Sentiment Tracker ad hoc questions data indicates that residents of all GB nations believe they took fewer domestic trips in 2025 than in 2019.

This source provided further evidence of a suggested decline in overnight domestic trip-taking, albeit two years after 2023, and reliant on long-term memory.

Perceptions of overnight domestic trip-taking in 2025 and 2019, Percentage, UK



Source: Domestic Sentiment Tracker. TR2. We appreciate it might be hard to remember, but thinking back to 2019, would you say you took…? UK residents n=1,503; England residents n=1,091 Scotland residents n=218; Wales residents n=170

Domestic Bank Holiday Trip Tracker

- This data is based on nationally representative surveys of UK residents to understand trip intentions at Easter and August bank holidays.
- This survey used a consistent methodology in 2019 and 2023, providing reliable supporting evidence.
- The results are a useful snapshot of intention and behaviour at busy times of the year and can support other data in the report.
- However, as the data is only based on a small part of the year, it cannot be used to draw wider conclusions. Caution should also be taken when assessing Easter, which took place earlier in 2023 than in 2019 - later Easters tending to drive increased leisure activity.

Evidence for domestic **overnight** tourism: **WEAK**

UK coverage, robust and representative sample, consistent source, only over bank holidays, only holidays, not all overnight trips and only trip intentions

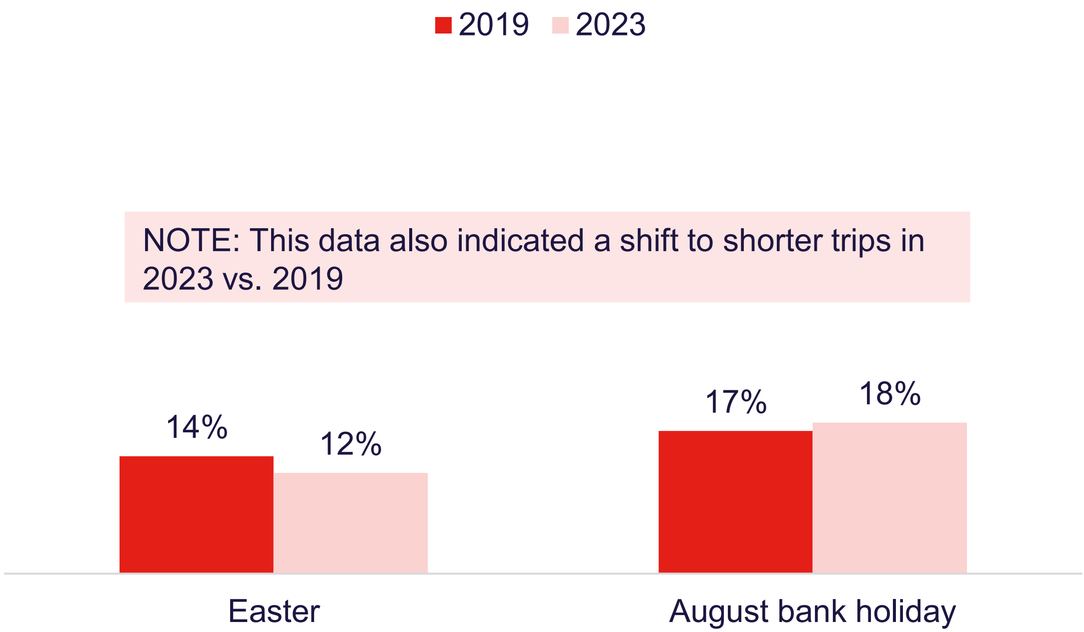
Evidence for domestic **day** tourism: **MODERATE**

UK coverage, robust and representative sample, consistent source, only bank holidays and only trip intentions

VisitEngland's Trip Tracker points to a slight drop in domestic overnight trips and day trips in 2023 - particularly day trips.

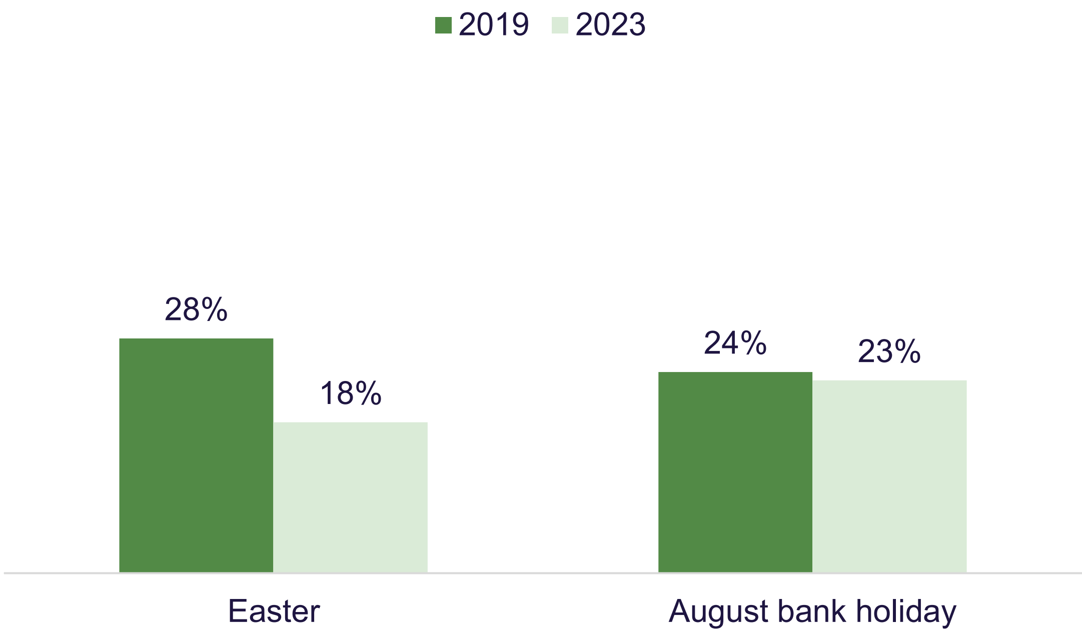
Although the difference in the incidence of overnight trips was relatively small, the decline in trip length suggests that the number of domestic nights will have dropped in both periods. For day trips, there is a more clear-cut picture of decline.

Proportion definitely planning to take a holiday in the UK on a bank holiday in 2019 and 2023, Percentage, UK



NOTE: This data also indicated a shift to shorter trips in 2023 vs. 2019

Proportion definitely planning to take a day trip in the UK on a bank holiday in 2019 and 2023, Percentage, UK



Source: VisitEngland Trip Tracker. Please note that Easter 2023 (Good Friday 7th April) fell earlier than Easter 2019 (Good Friday 19th April) which may skew results

Image: Wide view of Conwy Castle across the Conwy river, Conwy, Wales ©Crown Copyright/Visit Wales

STEAM data

STEAM data - source details

The data in this section is based on data provided by Global Tourism Solutions' STEAM reports. STEAM is an economic impact model that uses 'bottom – up' local data and intelligence to generate estimates of economic impact, visitor volumes and value at a top level. Although primarily an economic impact tool, it is one of only a few available sources that offers a **consistent trend pre- (2019) and post- (2023) pandemic**. It is used by some LVEPs (Local Visitor Economy Partnerships) in England, and local authorities in Wales. VisitScotland also have access to this data.

There are, however, a number of important **caveats** to be aware of in our use of this data:

- **Domestic vs Inbound:** STEAM data does not distinguish between domestic and international individuals. To counter this limitation, we have only presented data for **LVEPs and regions for whom domestic visits represent a vast majority of their total overnight visitors - 85%+ in England and 80%+ in Scotland**. Due to the dominance of domestic tourism in Wales, we have not limited Wales data in this way.
- **England coverage of available data:** Not all LVEPs subscribe to STEAM (as they might be subscribed to other economic modelling, such as the Cambridge model) or have data available for the "bridge years" 2019 and 2023. In England, only 15 out of 45 LVEPs hold STEAM data from 2019 and 2023 on overnight trips. Based on GBTS data, the overnight trips to these 15 areas represent 34% of all England's domestic overnight trips (see map and table on next page for distribution). The LVEPs areas for which 85%+ or more of their overnight visits are domestic represent **19% of England domestic overnight trips** - areas with 90%+ **represent 17% of England's overnight domestic trips.**
- **Scotland coverage and data inputs**: All Scotland regions have STEAM data available. However, any region where less than 80% of overnight visits are domestic have been excluded, for the reasons mentioned above. This means than 10 out of 12 Scotland regions were included. Please also note that Scotland volume data is based on 'nights' not 'visits' - this is because the assumptions used to create 'visits' makes it an unstable source.
- **Wales coverage**: The data included within our Wales calculation is based on local authorities that subscribe to STEAM and those that responded to our request for data. 13 out of 22 local authorities contributed with almost complete coverage in North Wales, meaning there is likely a North Wales bias in total figures. Please note, due to the dominance of domestic tourism in Wales, no local authorities have been excluded based on the balance of domestic and inbound tourism.
- **Lack of data for some key domestic areas:** Unfortunately, we don't have STEAM data for 2019 and 2023 to build the bridge for the South West, East Coast, London, and most of the South East. Seaside locations are also lacking.
- **Methodology and input considerations:** While we are informed the STEAM methodology has remained consistent, we are not party to the detail on input data methods and assumptions. We may therefore be unaware of any input data changes that may have impacted changes in visitor numbers.

Evidence for domestic **overnight** tourism:
MODERATE

Robust, consistent, based on multiple sources, not full GB coverage

Evidence for domestic **day** tourism:
MODERATE

Robust, consistent, based on multiple sources, not full GB coverage

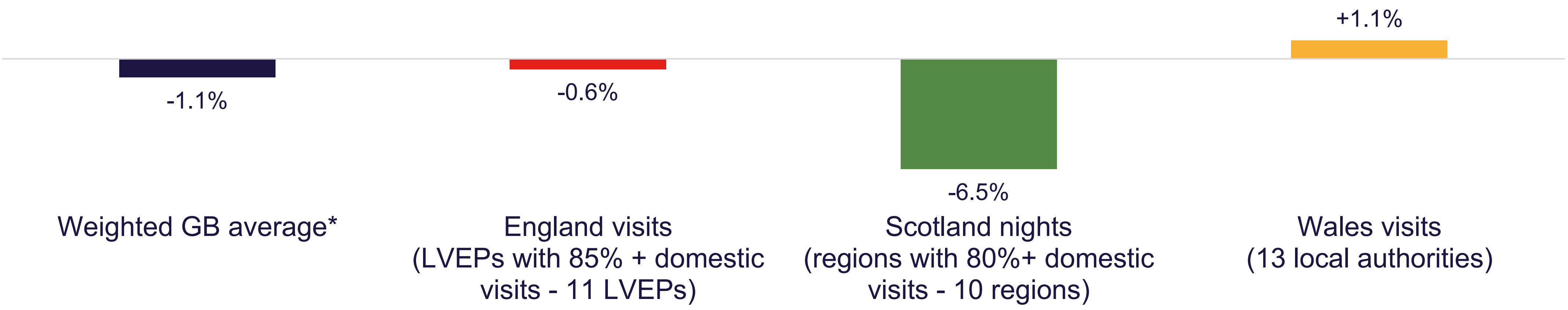
Based on the available data, overnight tourism in Britain declined in 2023, compared to 2019.

The available STEAM data across Britain supports the survey data in suggesting a decline in domestic tourism between 2019 and 2023. The picture in Wales is slightly more positive, although this is driven by North Wales, with all other parts of the country reporting a drop. The lack of full STEAM coverage - particularly in seaside destinations such as in the South West of England where anecdotal feedback also suggests a decline - means we cannot be certain about *how much* it has dropped, but our weighted average sits at -1.1%.

Changes in overnight domestic trip volume from 2019 to 2023, Percentage change, GB

Note: LVEPs with 90%+ domestic visits experienced a 1.5% drop in overnight visits

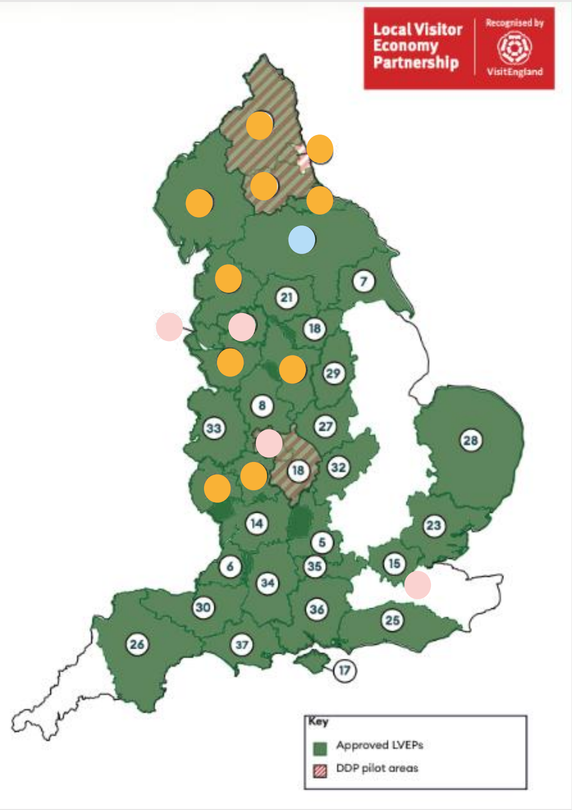
Regional breakdown**	
North Wales	+3.7%
Mid Wales	-1.2%
South West Wales	-2.2%
South East Wales	-3.2%



Source: STEAM. *Weighted GB average is created based on weighting each of England, Scotland and Wales to the overnight domestic visitor numbers reported in GBTS in 2023 (England = 85%; Scotland =10%; Wales = 7%). **Wales regional breakdown shown to illustrate impact of North Wales on overall findings

England LVEPs with STEAM data for 2019 and 2023

Map illustrating LVEPs with STEAM data for 2019 and 2023



= data available and used

= data available and used for part of region

= data available but not used

Table indicating LVEPs used

LVEP*	Domestic tourism percentage	Cumulative proportion of domestic overnight trips	Change in overnight trips 2019 to 2023	Use of data
Herefordshire	97%	0.6%	+3%	11 LVEPs included in the calculation
Visit Worcestershire	97%	3.8%	0%	
Visit Northumberland	94%	4.4%	-4%	
Marketing Lancashire	94%	7.4%	-8%	
Cumbria Tourism	93%	10.1%	+10%	
Visit Peak District, Derbyshire and Derby	92%	12.0%	-9%	
Tees Valley	92%	12.7%	+4%	
Visit County Durham	91%	13.4%	0%	
York*	90%	16.7%	-8%	
Marketing Cheshire	87%	18.3%	+1%	
Newcastle Gateshead Initiative	85%	19.4%	+4%	
Visit Kent **	79%	22.4%	-8%	Data not used due to the share of inbound visitors in these areas
Birmingham, Solihull and the Black Country	76%	26.1%	-1%	
Marketing Manchester	75%	31.3%	+2%	
Liverpool City Region	73%	33.7%	+11%	

Source: STEAM. *York is typically part of the York and North Yorkshire LVEP. However, data was not available for North Yorkshire, so only York is included in this report / ** Visit Kent LVEP doesn't exist currently.

decision house

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Scotland regions with STEAM data for 2019 and 2023

Table indicating Scotland regions used and change in overnight nights from 2019 to 2023

Region	Domestic tourism percentage	Cumulative proportion of domestic overnight trips	Change in overnight nights 2019 to 2023	Use of data
Dumfries & Galloway	96%	5.0%	+12.0%	Data used
Ayrshire & Arran	91%	9.4%	-6.9%	
Scottish Borders	91%	11.9%	+8.9%	
Argyll & the Isles	87%	19.0%	-9.2%	
Dundee & Angus	86%	22.1%	+0.1%	
Highlands & Islands	84%	41.9%	-6.9%	
Fife	83%	46.1%	-18.0%	
Perthshire	83%	51.2%	-11.8%	
Stirling & Forth Valley	83%	55.9%	-13.6%	
Aberdeen, Aberdeenshire & Moray Speyside	83%	63.6%	-8.8%	
Glasgow & Clyde Valley	71%	78.4%	+37.4%	Data not used due to the high share of inbound visitors
Edinburgh & the Lothians	57%	100%	+0.3%	

Source: STEAM. Regions have been included if their domestic tourism percentage (as a proportion of all overnight stays) are 80%+. Nights is used as the core metric as it is more robust than visits in Scotland

Wales Local Authorities with STEAM data for 2019 and 2023

Map illustrating Wales local authorities providing STEAM data for 2019 and 2023*

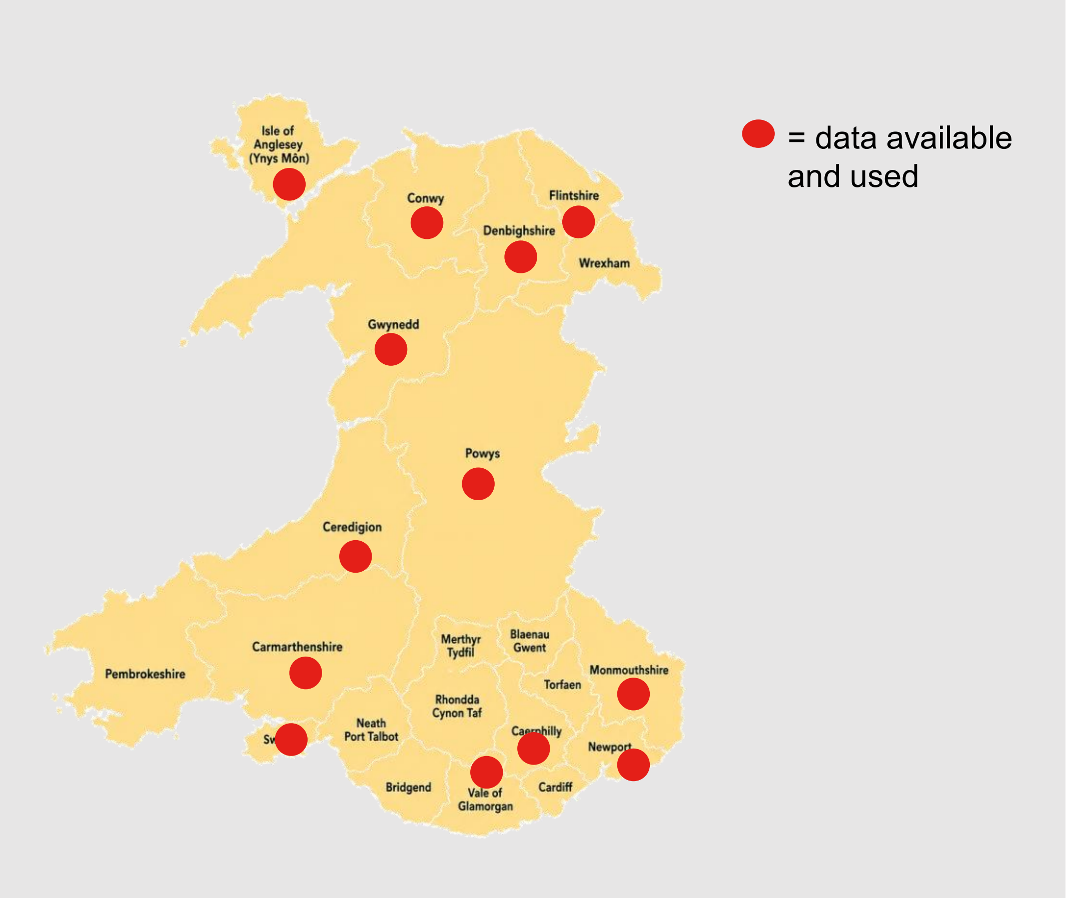


Table indicating local authorities used and change in overnight trips

Local Authority	Region	Change in overnight trips 2019 to 2023
Isle of Anglesey (Ynys Môn)	North Wales	+8%
Carmarthenshire	South West Wales	+5%
Denbighshire	North Wales	+5%
Caerphilly	South East Wales	+5%
Conwy	North Wales	+4%
Monmouthshire	South East Wales	+4%
Gwynedd	North Wales	+3%
Ceredigion	Mid Wales	+1%
Flintshire	North Wales	0%
Powys	Mid Wales	-3%
Newport	South East Wales	-6%
Swansea	South West Wales	-7%
Vale of Glamorgan	South East Wales	-10%

Source: STEAM. *Local authorities are included if they collect STEAM data and responded to our request to incorporate this data into this report. Due to the dominance of domestic tourism in Wales, local authorities were not excluded based on the balance of domestic and overseas tourism. / Please note a strong North Wales bias which may have influenced the overall Wales findings

Day trip volumes are likely to have declined, although the picture may be more positive in Wales, driven by North Wales.

The decline in day trips adds further support to the hypothesis that there was a general decline in leisure behaviour in 2023 relative to 2019.

Changes in day trips from 2019 to 2023, Percentage change, STEAM data, GB

Regional breakdown**	
North Wales	+3.5%
Mid Wales	-8.1%
South West Wales	-3.6%
South East Wales	-10.0%

Source: STEAM. *Weighted GB average is created based on weighting each of England, Scotland and Wales to the overnight domestic day visit numbers reported in GBDVS in 2023 (England = 88%; Scotland =8%; Wales = 5%). **Wales regional breakdown shown to illustrate impact of North Wales on overall findings. Note: Day visits data also counts overseas visitors.

Visitor attraction admissions

Image: People enjoying an interactive experience and various displays at The Inverness Castle Experience, Highland, Scotland. ©The Inverness Castle Experience

Visitor attraction admissions - source details

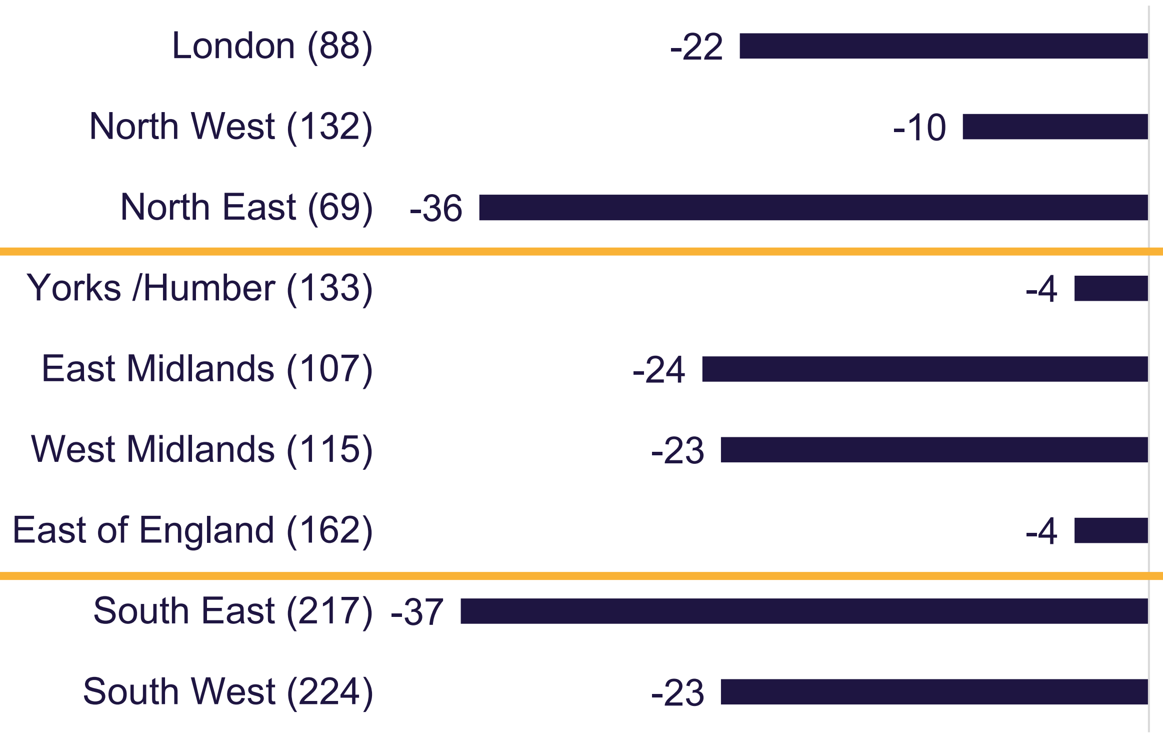
- This data is based on the following sources: England - VisitEngland Visitor Attractions survey (2023 data); Scotland - Moffat Centre visitor attractions survey (2023 data); Wales - Wales Tourism Business Barometer (summer 2022 and 2023 data).
- Admissions do not distinguish between international and domestic visitors, nor do they fully separate day trips from overnight staying visitors. However, this information gap can be filled with domestic and inbound statistics derived from the Great Britain Tourism Survey and the International Passenger Survey, visits to visitor attractions are dominated by domestic day visits with 81% share, while domestic overnights' share is 8% and inbound visits c11%.
- Visiting attractions is included in 20% of domestic overnight trips and day visits.
- There is also evidence that attraction-visiting behaviour changed during the pandemic with people acquiring new hobbies, learning about new (often free) places to visit, and changing household dynamics (including a rise in dog ownership).
- In addition, some visitor attractions (such as Edinburgh Castle) reduced visitor capacity following the pandemic, artificially lowering admissions. Regardless, the data adds to our evidence base.

Evidence for domestic **overnight** tourism: **WEAK**	Robust, consistent, GB coverage, weak representation of overnight trips
Evidence for domestic **day** tourism: **MODERATE**	Robust, consistent, GB coverage, well representative of day visits

England regions with over 90% share of domestic visitors show a decline in 2023 vs 2019, East of England and Yorks/Humber by 4%, and Midlands by 23 to 24%.

While regions with 90% of domestic visitors provide a good indication of domestic tourism, it doesn't differentiate between overnight and day visitors. However, this source does provide a further evidence that, as of 2023, intentional leisure behaviour was below 2019 levels.

Visitor attractions admissions changes from 2019 to 2023, England, [%]



% of domestic visitors
62%
89%
88%
91%
94%
91%
92%
77%
80%

Source: England - VisitEngland Visitor Attractions survey

In 2023, visitor attraction admissions were significantly down on 2019 also in Scotland and Wales.

Given the number of caveats associated with visitor attractions data for our purposes, it is potentially one of the less influential of our sources. However, it does provide more evidence that, as of 2023, intentional leisure behaviour was below 2019 levels.

Visitor attractions admissions changes from 2019 to 2023, Scotland and Wales

Scotland	Wales*
-5%	-21%
(Total difference in recorded admissions)	*(Net: 'More' minus 'fewer' in the summer amongst attractions)*

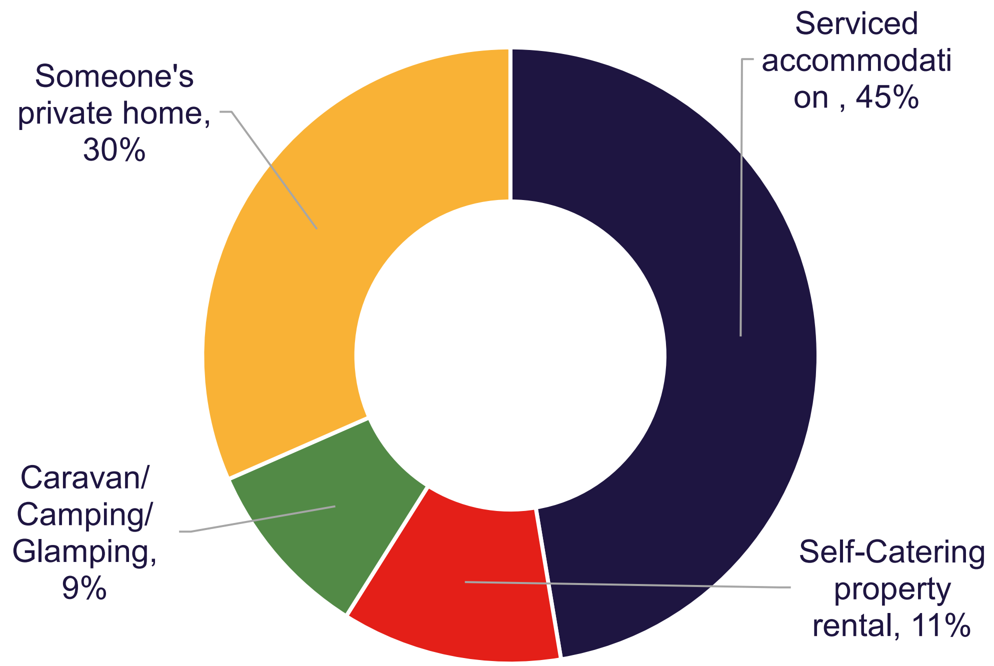
Source: Scotland - Moffat Centre visitor attractions survey; Wales - Wales Tourism Business Barometer
Please note, each nation's data is based on a different methodology. For example, Scotland is based on the difference in the cumulative total across all attractions, whereas Wales is based on the net of 'more minus fewer' in a scaled question amongst visitor attractions.
*Wales results are also based on a comparison of summer 2022 vs. 2019 (rather than 2023 and all-year). Results should therefore not be directly compared but instead used to demonstrate how well they independently support the overall narrative of the report.

Image: A guest suite at Palé Hall - a five-star luxury country house hotel on the edge of Snowdonia (Eryri), North Wales. ©Pale Hall/Adam Stone Photography

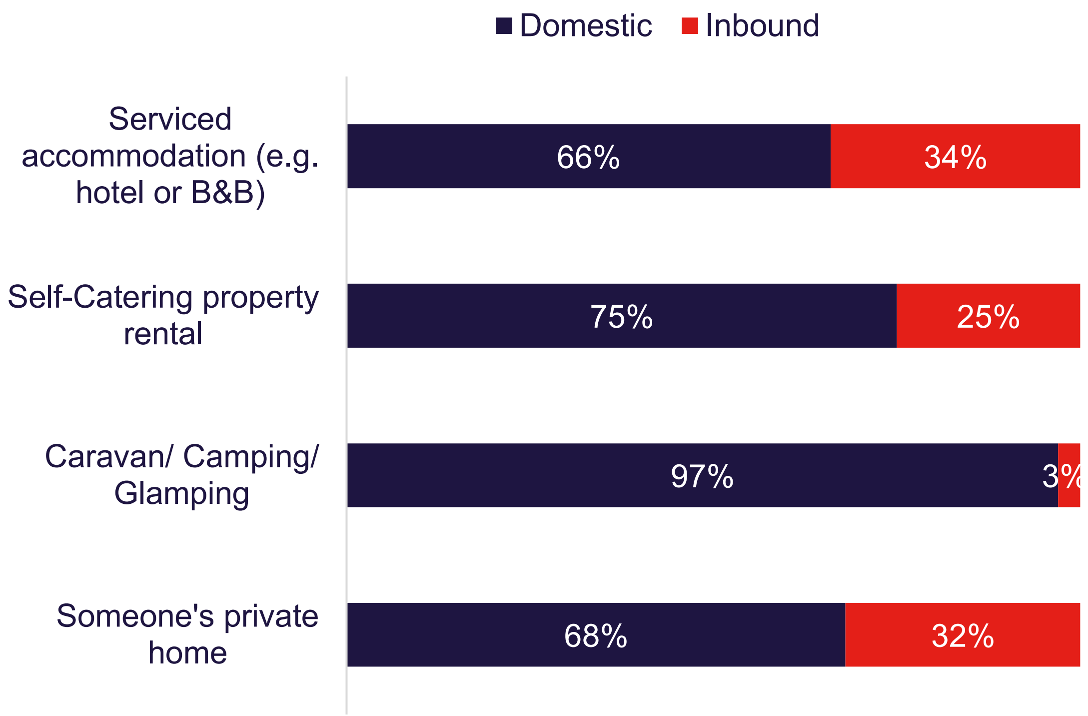
Accommodation data

Context: Serviced accommodation represents the largest share of accommodation amongst domestic tourists in Great Britain. Caravan/camping/glamping is the accommodation type most dominated by domestic tourists.

Share of accommodation for domestic trips, GBTS



Share of domestic and inbound trips by accommodation type, GBTS and IPS*



Source: Great Britain Tourism Survey (2024) and International Passenger Survey (ONS, 2024)
* Above shares are estimates based on volume statistics sourced from two separate surveys.

Hotel occupancy

- This data is based on Hotel Occupancy data provided to VisitEngland, VisitScotland, and Visit Wales by STR, as part of an hotel occupancy reporting contract.
- Serviced accommodation represents 45% share of domestic overnight trips and 51% share of inbound trips.
- Hotel occupancy does not distinguish between domestic and international guests, and as such interpretation needs to take place in the context of other supporting data. Based on the Great Britain Tourism Survey (domestic tourism statistics) and the International Passenger survey (inbound tourism statistics), domestic overnight visitors at serviced accommodation represent a share of 66%, while inbound only 32%.
- In addition, occupancy is based on the available stock which can change over time. Following the pandemic, the overall hotel stock remained consistent. However, increased staff shortages or renovations meant that some hotels are likely to have reduced room availability, with occupancy likely reported against fewer rooms.

Evidence for domestic overnight tourism:

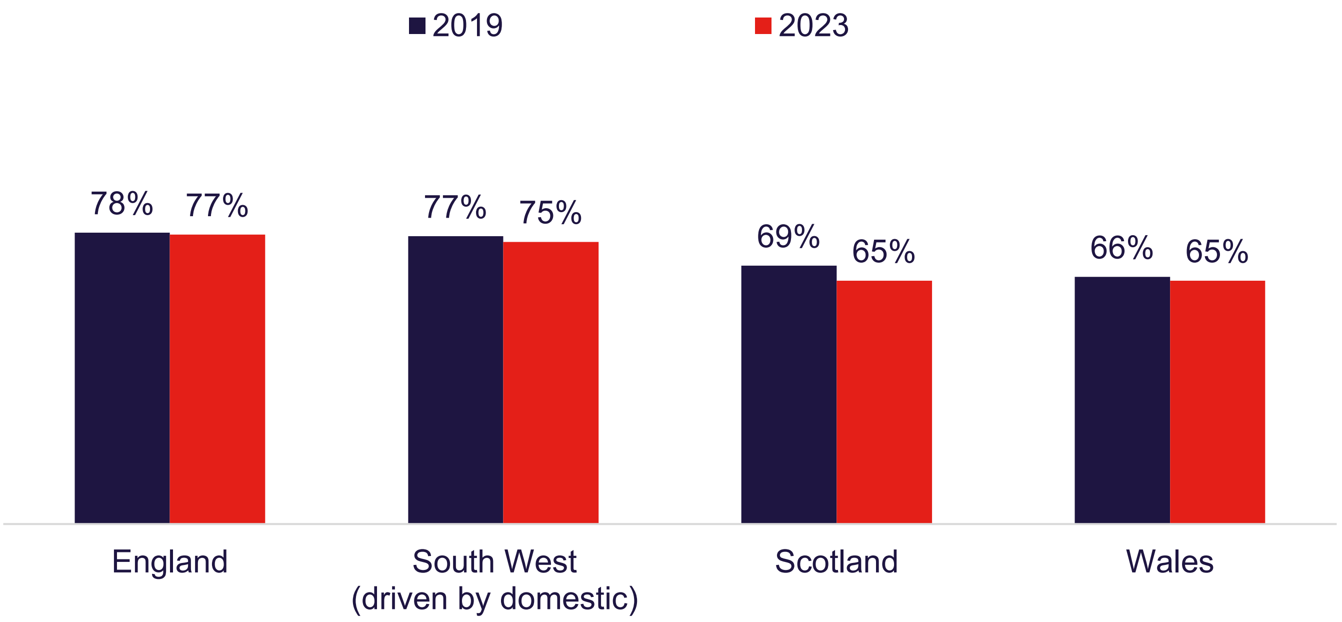
MODERATE

GB coverage, consistent, covering almost half of domestic overnight trips, all trip purposes, however, unable to distinguish domestic vs inbound and attribute the change to each group.

Hotel Occupancy rates have declined relative to 2019 in England, Scotland and Wales.

In England and Wales, the slight declines in hotel occupancy are not compelling evidence of a decline in domestic tourism (particularly given international tourism was down on 2019), although it's likely occupancy is reported in the context of contracted supply - a hypothesis supported by the larger decline reported in the Wales Tourism Business Barometer. In Scotland, where international tourism increased, the drop in occupancy is strong evidence of a fall in domestic tourism stays.

Changes in hotel occupancy rates from 2019 to 2023, Percentage



Other data on hotel occupancy

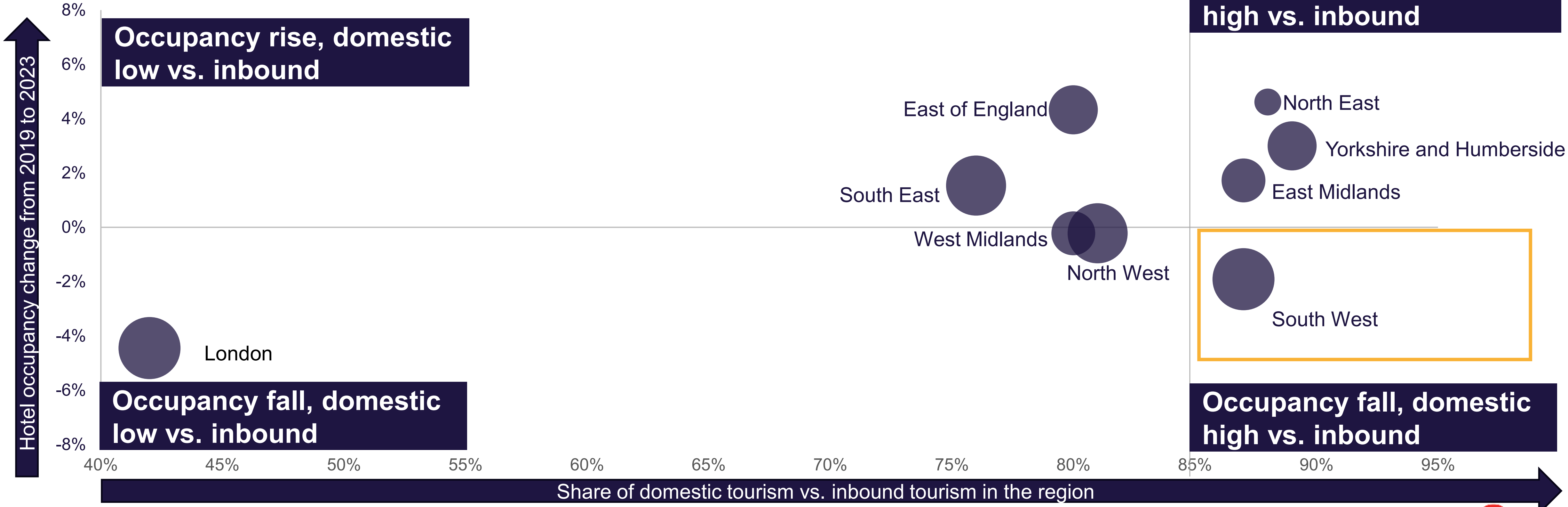
Source	Finding
Wales Tourism Business Barometer 2022 and 2023	'Serviced accommodation' businesses reported fewer customers in the summer of 2022 vs. 2019, and also fewer customers in 2023 vs. 2022.

Source: STR Hotel Occupancy data

South West experienced a decline in occupancy relative to 2019, adding to evidence of a decline across the country.

The majority of England regions with a high concentration of domestic tourism report an increase in hotel occupancy vs. 2019. Crucially, however, STEAM data from corresponding regions suggests that hotel occupancy would exaggerate overnight tourism numbers if used as a standalone source. For example, in the North East of England (where we have both occupancy and STEAM data) hotel occupancy was up 5% but STEAM overnights were up between 1.4% and 3.6%. Also crucially, the South West of England - an area missing in STEAM data - experienced a drop in hotel occupancy, strongly implying STEAM data would also report a decline.

England region hotel occupancy rates from 2019 to 2023 vs. size of domestic audience, Percentage, Hotel occupancy data and GBTS. Bubble represents size of domestic audience, England

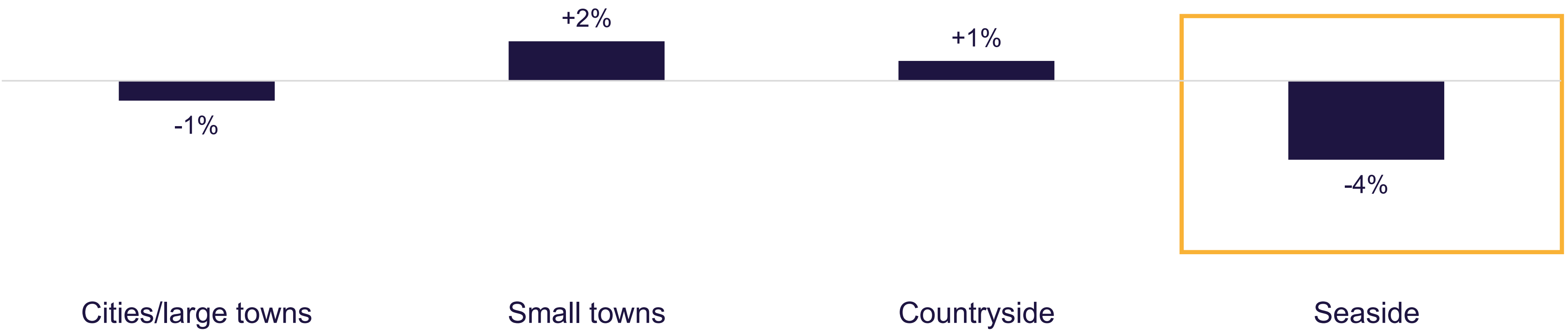


Source: STR Hotel Occupancy data, GBTS and IPS. South West highlighted due to lack of STEAM data for this region

Seaside destinations - dominated by domestic visitors - also experienced a drop in occupancy.

The fall in hotel occupancy in seaside locations - an area also broadly lacking in the STEAM data - further supports an argument for a decline in domestic tourism.

Changes in England hotel occupancy from 2019 to 2023 by destination type, Percentage change, Hotel occupancy data in England



*Seaside highlighted because seaside destinations such as the South West of England and Pembrokeshire were unable to provide STEAM data

Holiday park & campsites

- This data is sourced from the Economic Benefit Reports for 2018 and 2023 published by UK Caravan and Camping Alliance (UKCCA). It focuses on holiday park and campsite sector.
- Caravan and camping accommodation represents 9% share of domestic overnight trips (source: GBTS 2024) and 1% share of inbound trips (source: IPS 2024).
- While it does not distinguish between domestic and international guests, camping and caravaning is predominantly used by domestic visitors.
- Domestically, there is also a level of variation by nation with Wales showing an 18% share of overnight trips using caravan, camping, glamping accommodation.
- Similarly to serviced accommodation, occupancy is based on the available stock can change over time, although this is validated by figures on pitches and UK holiday park numbers.
- These figures do not account for informal caravan and camping outside of holiday parks and campsites.
- Caravan and camping data is highly dependent on weather, so changes may not reflect demand levels.

Evidence for domestic overnight tourism:

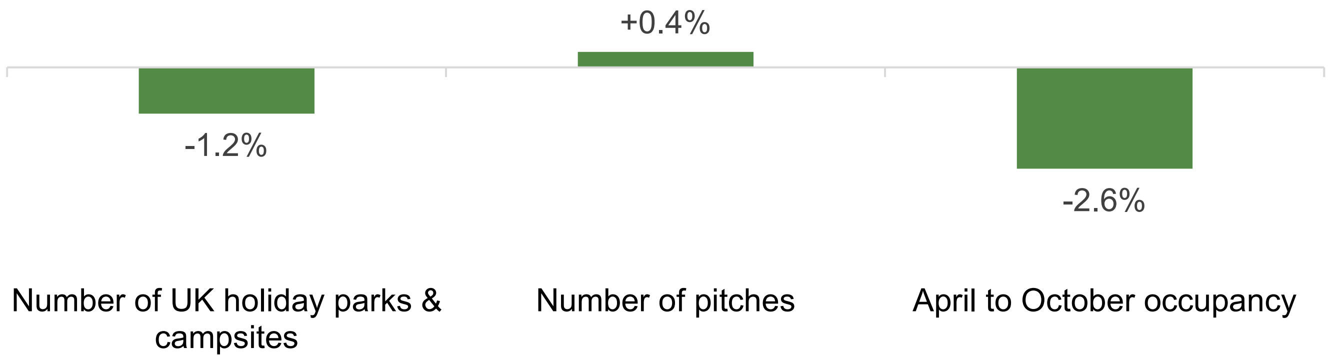
MODERATE

GB coverage, consistent, represents only 9% of domestic overnight trips but heavily dominated by domestic visitors

Holiday park & campsites stays (which are dominated by domestic tourists) are likely to have declined relative to pre-pandemic.

With domestic audiences making up the vast majority of their guests, holiday parks are a good proxy for the health of domestic tourism, albeit amongst a relatively small proportion of the market (c.9% of all stays). Along with other supporting data, the drop in occupancy relative to 2018 (a year that generated fewer domestic tourists than 2019 and for which the data is available), points to a decline in domestic tourism levels in 2023.

UK holiday park numbers, pitches and occupancy changes between 2018 and 2023, Percentage change, UK



Other data on holiday park occupancy

Source	Finding
Scotland Accommodation Occupancy survey	Occupancy for 'caravan and camping' was 41% in 2019 and 38% in 2023.
Wales Tourism Business Barometer summer 2022 and 2023	'Caravan/campsite' businesses reported fewer customers in the summer of 2023 vs. 2022, following a slight increase in summer 2022 vs. 2019. Overall, this suggests decline from 2019 to 2023.

Source: UK Caravan and Camping Alliance (UKCCA) Economic Benefit Reports for 2018 and 2023 (produced in 2019 and 2024 respectively)

Short-term rental reviews

- This data is based on short-term rentals reviews provided to VisitBritain by AirBnB.
- We use reviews as a proxy for stays in this section, as it allows analysis amongst a domestic market (please note short-term rental occupancy does not separate between domestic and international stays). However, this is a vulnerable metric, with tendencies to make reviews likely to change over time and by audience type.
- The short-term rental market underwent significant change during and after the pandemic, including the growth of platforms such as AirBnB, and the closure of smaller local platform. It is therefore likely that any growth reported is at least in part due to these shifts.
- Short-term rentals cover a small share of the total domestic overnight tourism, being part of self-catering category, which represents only 11% of all domestic overnight trips and 8% of inbound trips.

Evidence for domestic overnight tourism:

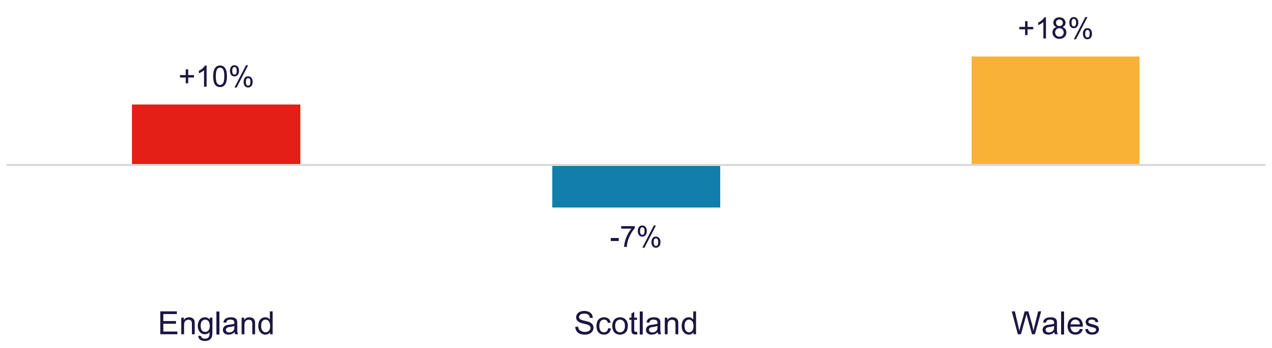
WEAK

This data is only a proxy for short-term lets, plus short-term rentals represent a small share of domestic overnight tourism

Short-term rental reviews indicate an increase in short-term rental use in England and Wales.

Short-term rental reviews (a proxy for stays) are one of the few data sources that challenge the argument of a decline in domestic tourism. However, it's likely that the increases we see here are driven by other factors as laid out at the start of this section. The Scotland Accommodation Occupancy Survey and Visit Wales' Tourism Business Barometer add weight to this argument, both reporting slight drops.

Number of reviews* for short-term rental properties amongst domestic users, Percentage change from 2019 to 2023, AirBNB reviews, GB



Other data on self-catering

Source	Finding
Scotland Accommodation Occupancy survey	Occupancy for 'self-catering' was 48% in 2019 and 43% in 2023

From 1 October 2022, the Scottish Government introduced a licensing scheme for short term lets, which includes a licence fee (likely impacted on rental charge).

Source: AirBnB short-term rentals reviews
*Reviews are used as a proxy for stays

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Image: A group of surfers walk in line along Whitesands Beach at dusk, in Pembrokeshire, Wales.
©Getty Images / Dougal Waters Photography Ltd

Conclusions

Summary of data sources and conclusions - overnight trips

Source	Key findings	Evidence for domestic overnight tourism	Domestic tourism trend 2023 vs 2019
ABTA Holiday Habits report	4 percentage point decline in domestic tourism from 2019 to 2023 amongst nationally representative audience.	MODERATE	DECLINE
Domestic Sentiment Tracker, an ad hoc question	Consumers believe they took fewer overnight trips ("a net decline") in 2025 when compared to 2019.	WEAK	DECLINE
Domestic Bank Holiday Trip Tracker	A slight decline in Easter bank holidays, a marginal increase (not statistically significant) in August bank holidays, drops in trip lengths.	WEAK	DECLINE
STEAM data	Decline in overnight stays among LVEPs with available STEAM data for 2019 and 2023, and among LVEPs dominated by domestic visits.	MODERATE	DECLINE
Visitor attractions admissions	A large decline in admissions from 2019 to 2023.	WEAK	DECLINE
Hotel occupancy	A decrease in occupancy in key domestic areas, such as the South West, and seaside.	MODERATE	DECLINE
Caravan and camping	A decline in April to October occupancy among a predominantly domestic audience.	MODERATE	DECLINE
Short-term rental reviews	A rise in reviews provided by those who stayed in short-term rentals (a proxy for occupancy levels), however, representing less than 11% of domestic overnight stays.	WEAK	INCREASE

The available data reviewed in this analysis suggests that domestic overnight tourism in 2023 was below 2019 levels.
The estimated change is -2.3%.

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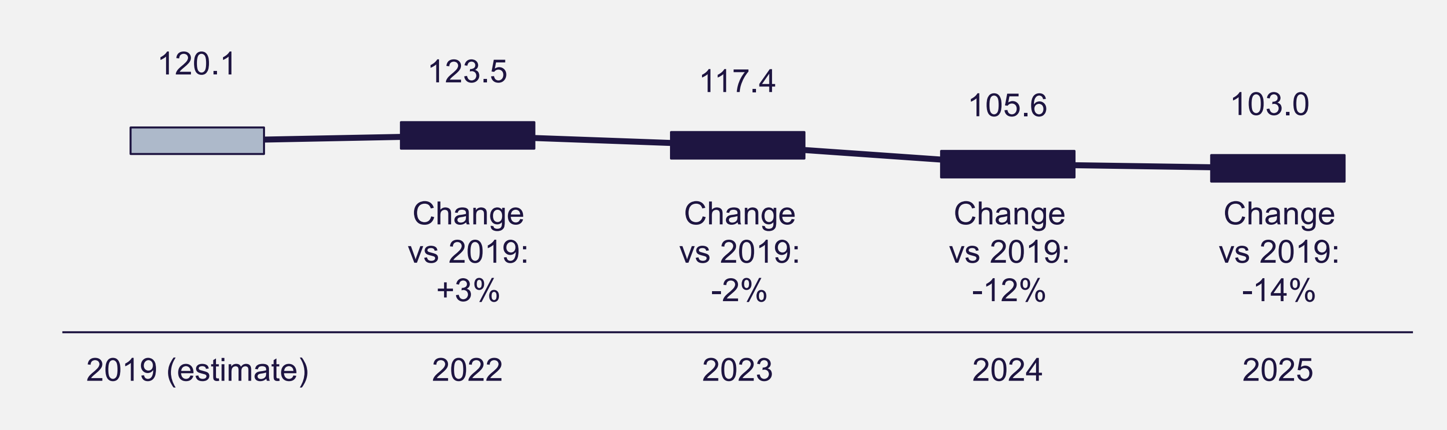
Summary of data sources and conclusions - day trips

Source	Key findings	Evidence for domestic day tourism	Domestic tourism trend 2023 vs 2019
England LVEPs STEAM data	A decline in day trips taken and spend in England, although Scotland trips have increased.	MODERATE	DECLINE
Domestic Bank Holiday Trip Tracker	A decline in day trips planned during Easter and August.	MODERATE	DECLINE
Visitor attractions admissions	A decline in admissions from 2019 to 2023.	MODERATE	DECLINE

The available data reviewed in this analysis suggests that domestic day visits volume in 2023 was below 2019 levels. The estimated change is -12.3%.

Estimated trend after applying a decline of 2.3% for overnight trips and a decline of 12.3% for tourism day visits between 2019 and 2023

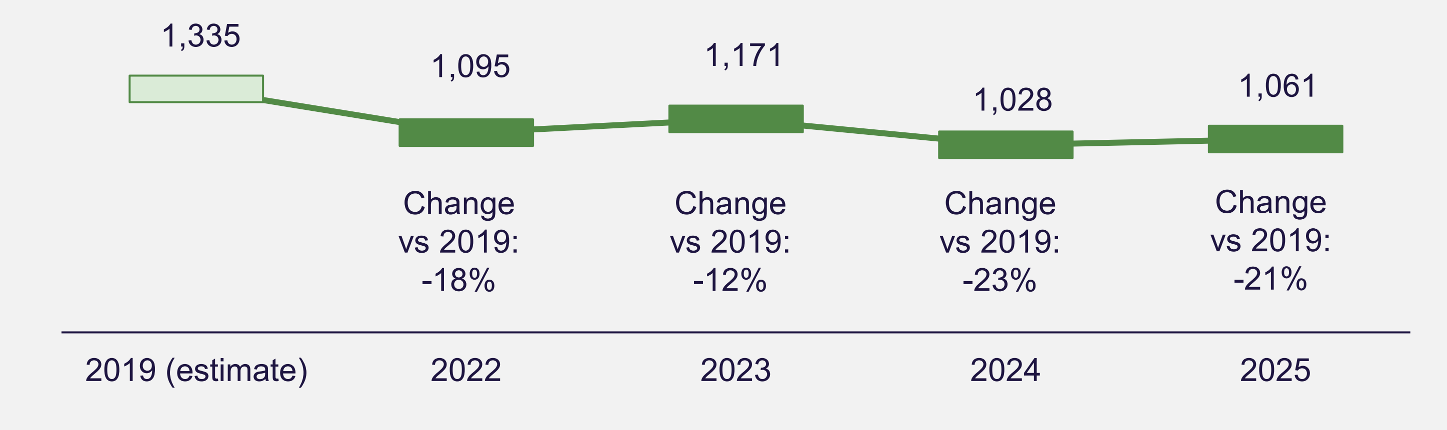
Total GB domestic overnight trips (millions)



The reported 2019 figure based on the previous methodology was 122.8m overnight trips in GB, which is roughly in line with our current estimate based on the analysis in this report, 120.1.

In our ‘summer 2022 vs 2021’ analysis, we concluded that summer 2021 was a stronger year for staycation, summer 2022 showing a slight decline.

Total GB domestic day visits (millions)



The reported 2019 figure based on the previous methodology was 1,653m tourism day visits in GB, which is larger than current estimated figure of 1,335 due to a more refined definition of tourism day visits in the new methodology.

Nevertheless, there is still a clear decline in tourism day visits volumes compared to estimated figures for pre-pandemic level.

Source: GBTS, IPS, Bridge analysis

Conclusions by nation

England

With England making up the vast majority of GB overnight trips and day visits, the estimated 2019 to 2023 trends are consistent with the overall GB picture - a comparable decline reported in both types of trip.

Scotland

In Scotland, the available evidence suggests a similar story to GB overall, although with a slight difference in the balance of decline of overnight trips and day trips. Specifically:

- Overnight domestic visits are likely to have declined more than across GB, evidenced by a bigger drop in domestic nights within the STEAM data, a larger drop in hotel occupancy (despite a rise in overseas visitors), and a bigger drop in short-term rental reviews (a proxy for stays).
- Day visits appear to have declined less than across GB, evidenced by a smaller drop in day visits in the STEAM data, and a smaller decline in visitor attractions admissions. However, this conclusion should be treated with caution as both figures are likely to be influenced by the rise in overseas visitors (Scotland the only nation to experience this).

Wales

For Wales, the data tentatively suggests a similar pattern to GB overall, albeit with both overnight trips and day trips buoyed by increases in North Wales. Specifically:

- Overnight trips are likely to have slightly declined overall in Wales. This tentative conclusion is driven by a slight fall in hotel occupancy, fewer ‘serviced accommodation’ customers, and fewer ‘caravan/campsite’ customers. Although STEAM figures report a rise in overnight trips in Wales, this is likely due to a bias in reporting to North Wales, with all other Wales regions reporting a decline (of the 12 local authorities that were unable to provide data, 11 were situated outside of North Wales). The pattern outside of North Wales suggests that if data was available across all local authorities, STEAM figures would have dropped in line with the wider GB picture.
- Day visits are also likely to have declined, although not as strongly as across GB. This is evidenced by a slight drop in Wales day visits in the STEAM data, and a strong decline in summer visitor attraction admissions. However, as with overnight trips, the STEAM decline in day trips is likely artificially softened by North Wales (which experienced an increase) - other parts of Wales reporting decreases similar to the rest of GB.

For more information, please click on the link below

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