

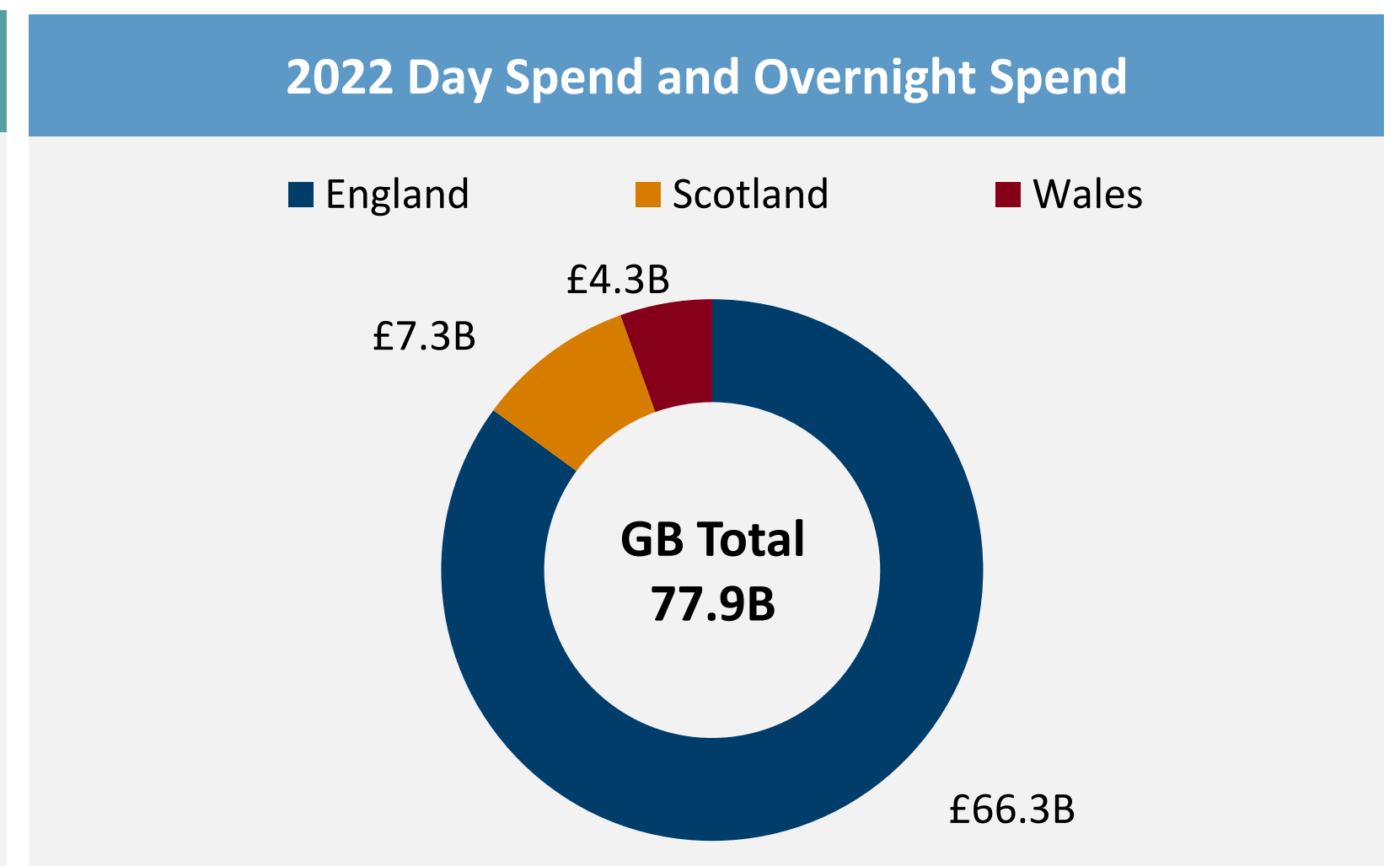
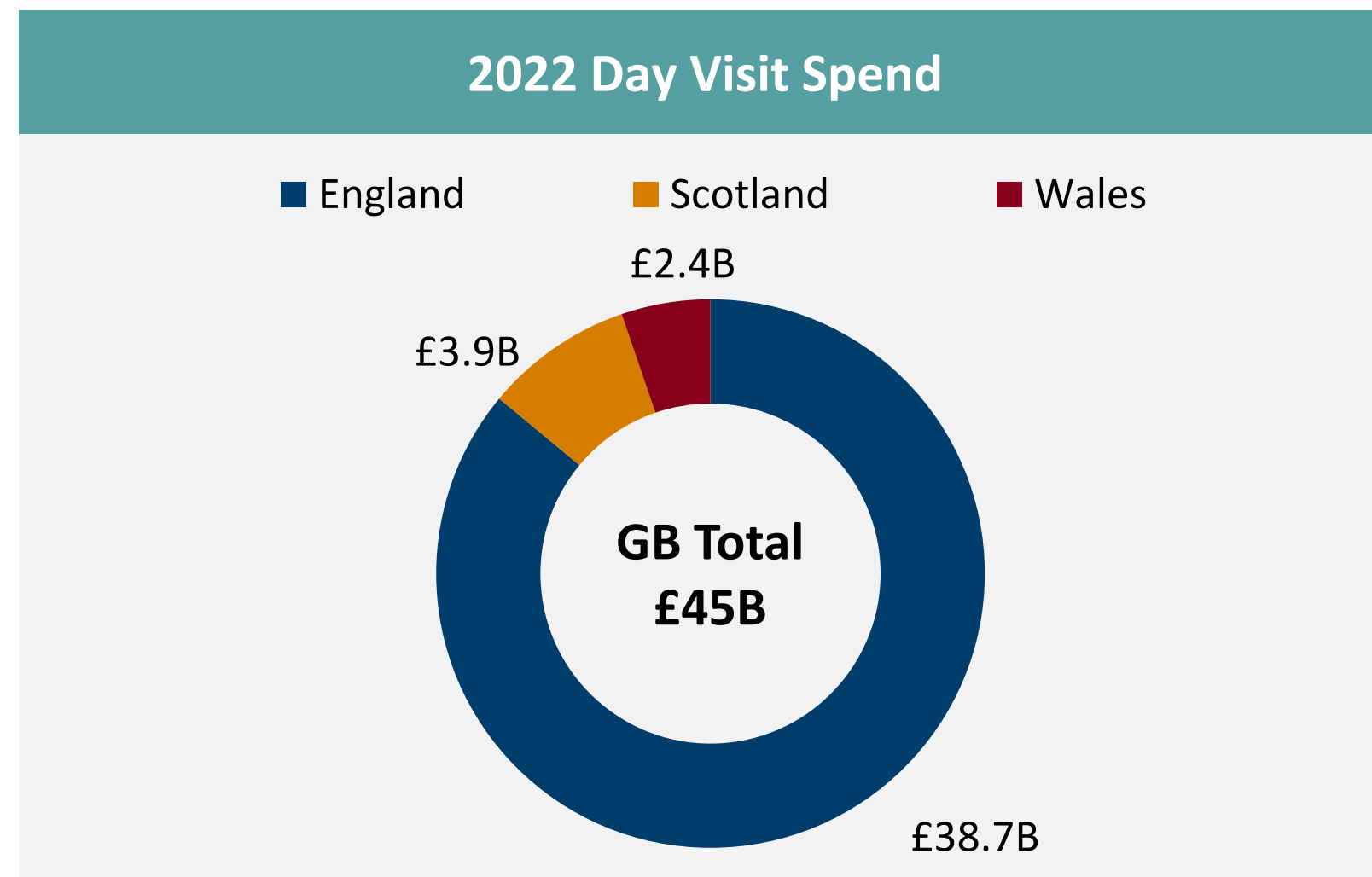
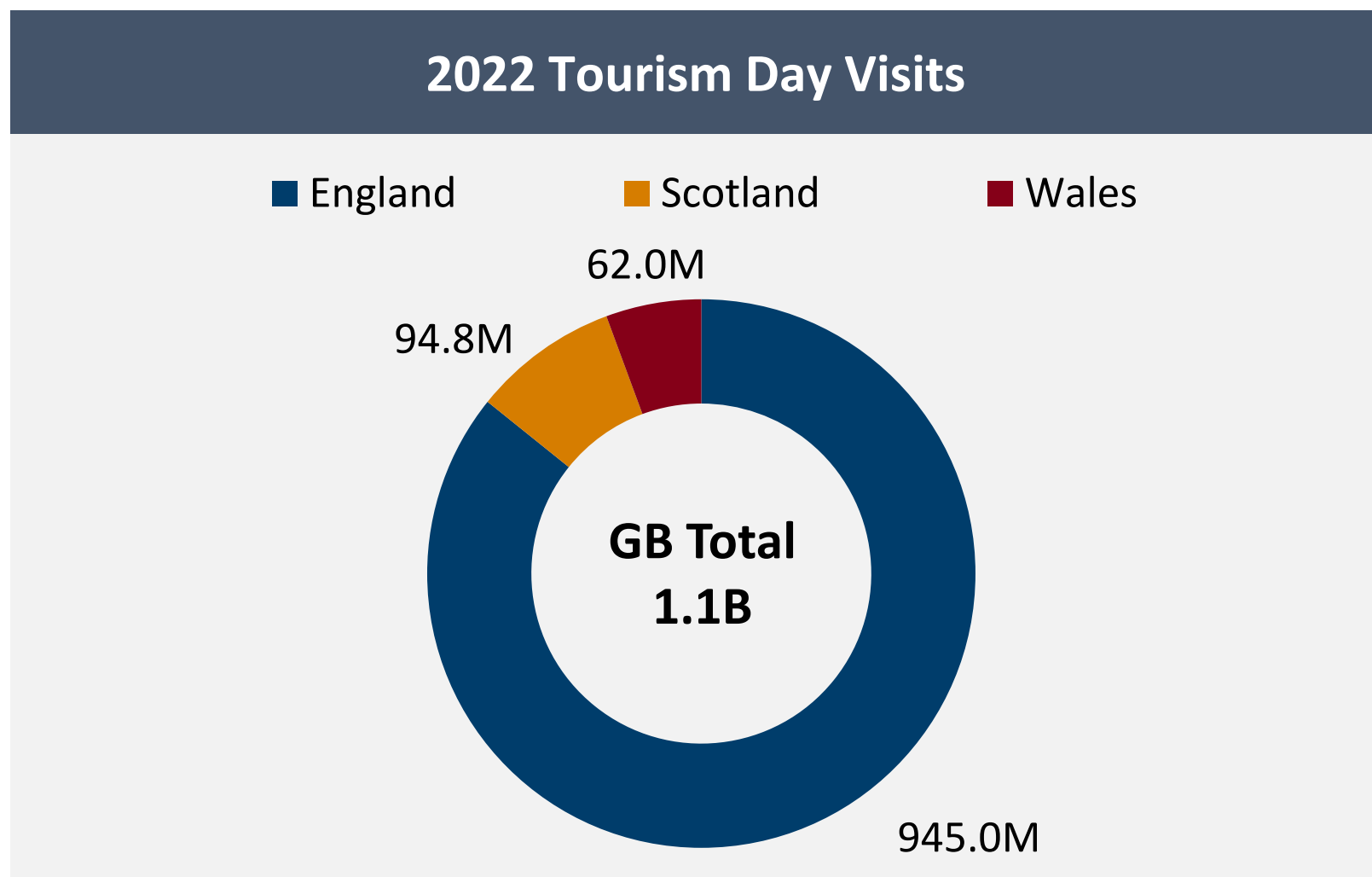
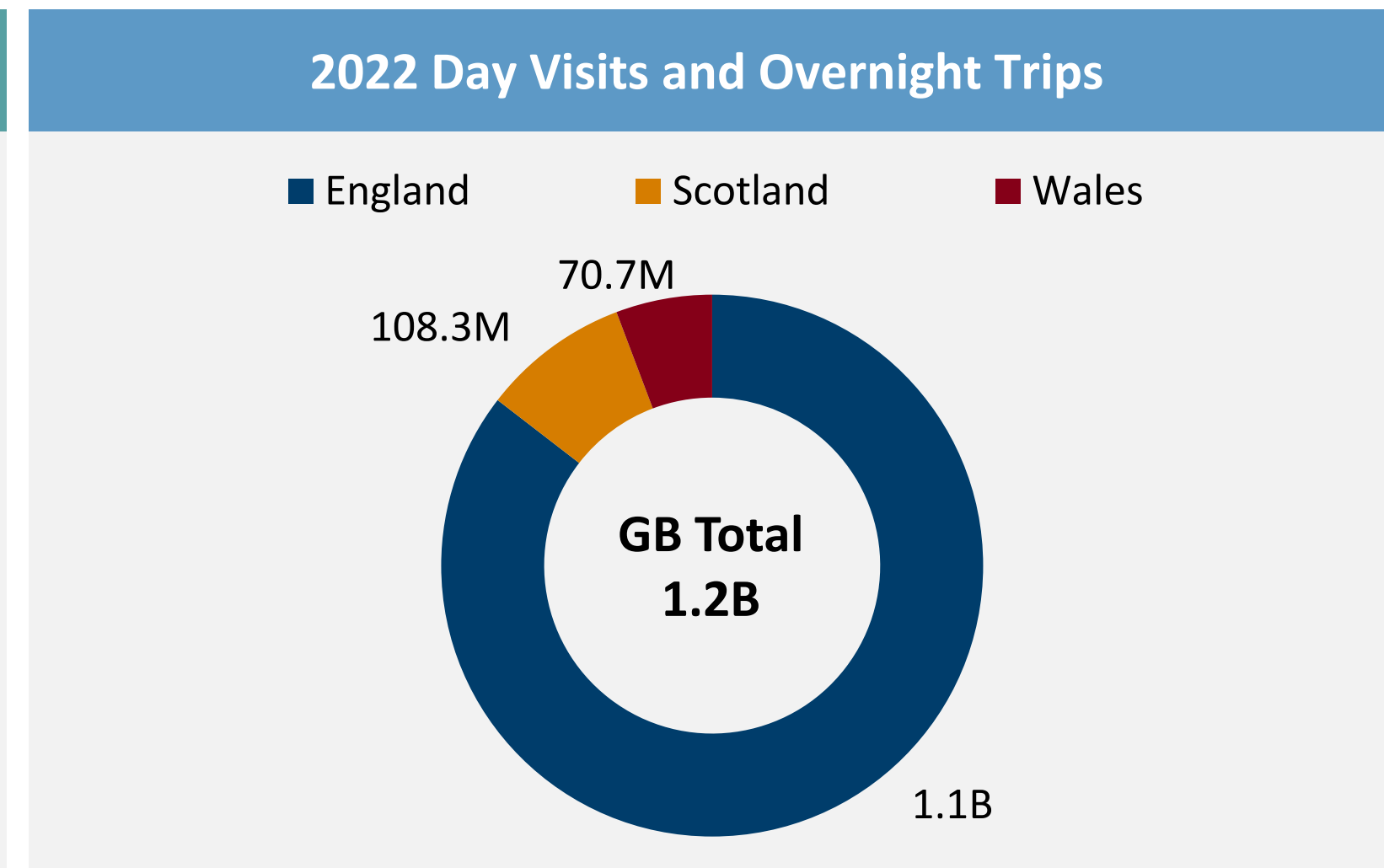
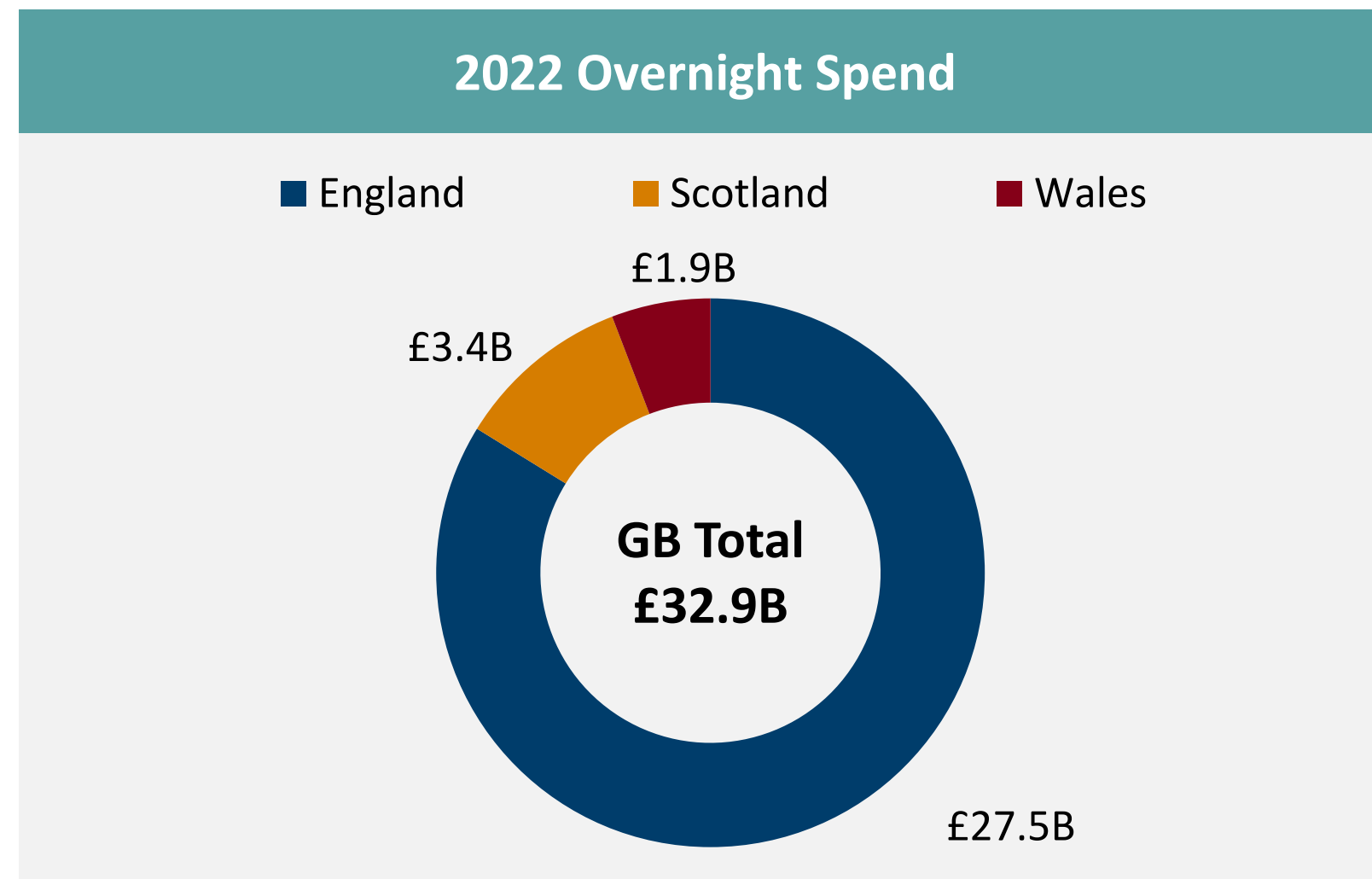
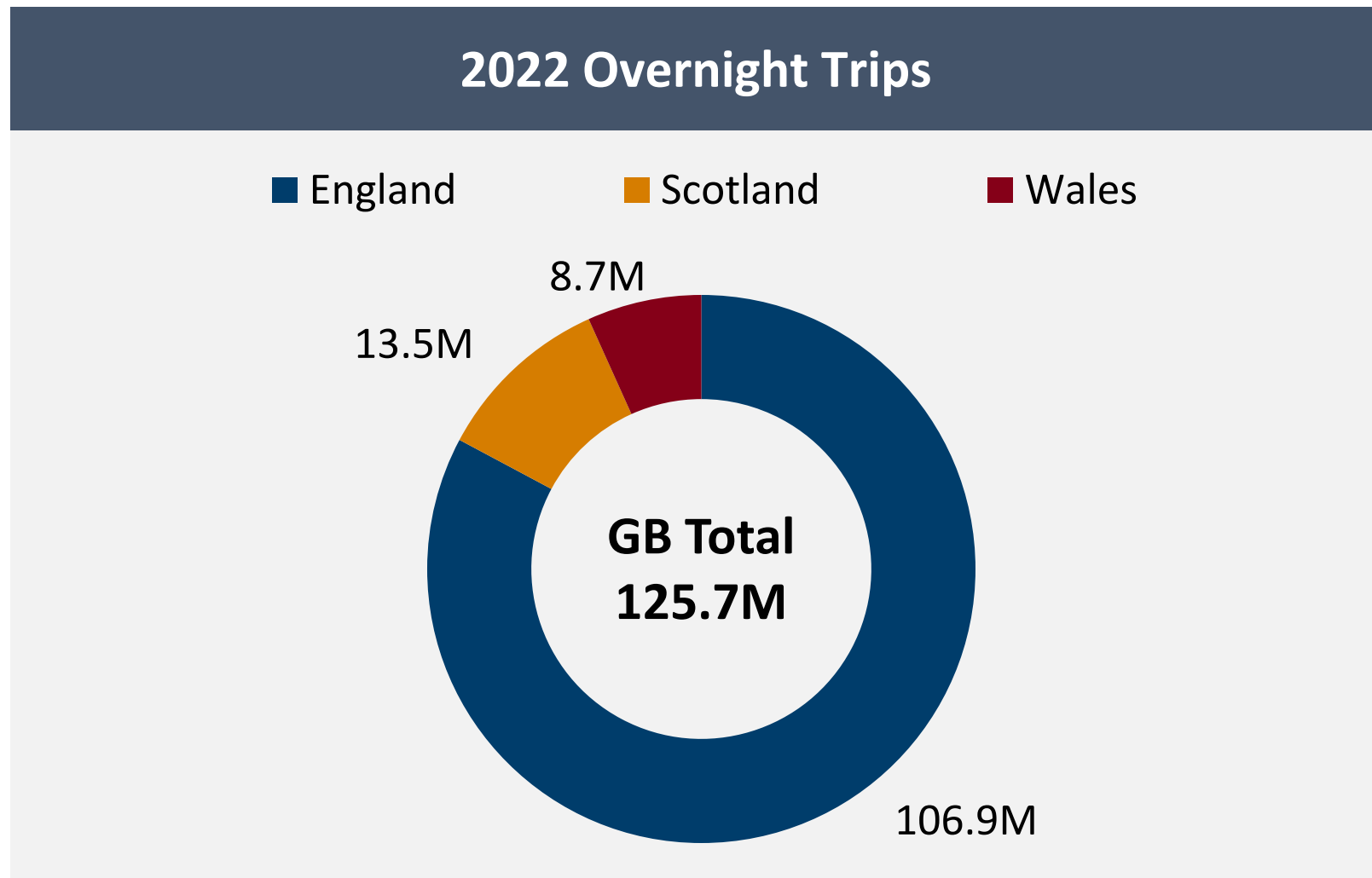
Domestic GB Tourism Statistics: Wales Overnight Tourism Survey Annual Report 2022



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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.



Source: Great Britain Domestic Overnight Tourism Survey (GBTS) 2022 and Great Britain Tourism Day Visit Survey (GBDVS) 2022

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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 Survey for 2022 January to December for Wales. Throughout the report the tourism statistics for 2021 are used to highlight trends in trips, spend and bednights. Please note the 2021 data (April to December) is revised data. Detailed results for England and Scotland are published by [VisitEngland](#) and [VisitScotland](#) 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 on the [Visit Wales](#) 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. Quarterly reports and detailed data on domestic overnight tourism can be accessed in Excel on the [Visit Wales](#) 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 it's 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 overnight leisure trips were not permitted. The results are comparable across nations (England, Scotland and Wales).
- The survey is jointly sponsored by VisitEngland, VisitScotland and Visit Wales. The survey is currently undertaken by independent research agency, BMG. Together with the Great Britain 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 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 GBTS 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.
- 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 Wales 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 2022 estimations based upon:

Nation	Unweighted Base Sizes 2022
GB	10,161
England	7,885
Scotland	1,537
Wales	993

- 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 [Visit Wales](#) 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.

Note: All spend figures are in nominal terms, not adjusted for inflation. While we see spend increases, this is largely caused by the high inflations rates.



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 had an impact on the duration of domestic trips, whereby British residents decreased the length of their overnight trips to offset the higher costs.
- **International travel** by Great British residents started to recover by April 2022, with 71.0 million trips abroad in 2022, according to the International Passengers Survey. As outbound travel started recovering in 2022, some domestic travel was replaced by travelling abroad.
- **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. From 11 February 2022, fully vaccinated travelers no longer needed to take any tests, but still needed to complete a passenger locator form. Unvaccinated travelers no longer had to immediately self isolate after arrival and take Day 2 and Day 8 tests. From 11 February, the requirement for immediate self-isolation and the Day 8 test were removed, and the 'Test to Release' scheme also ended.

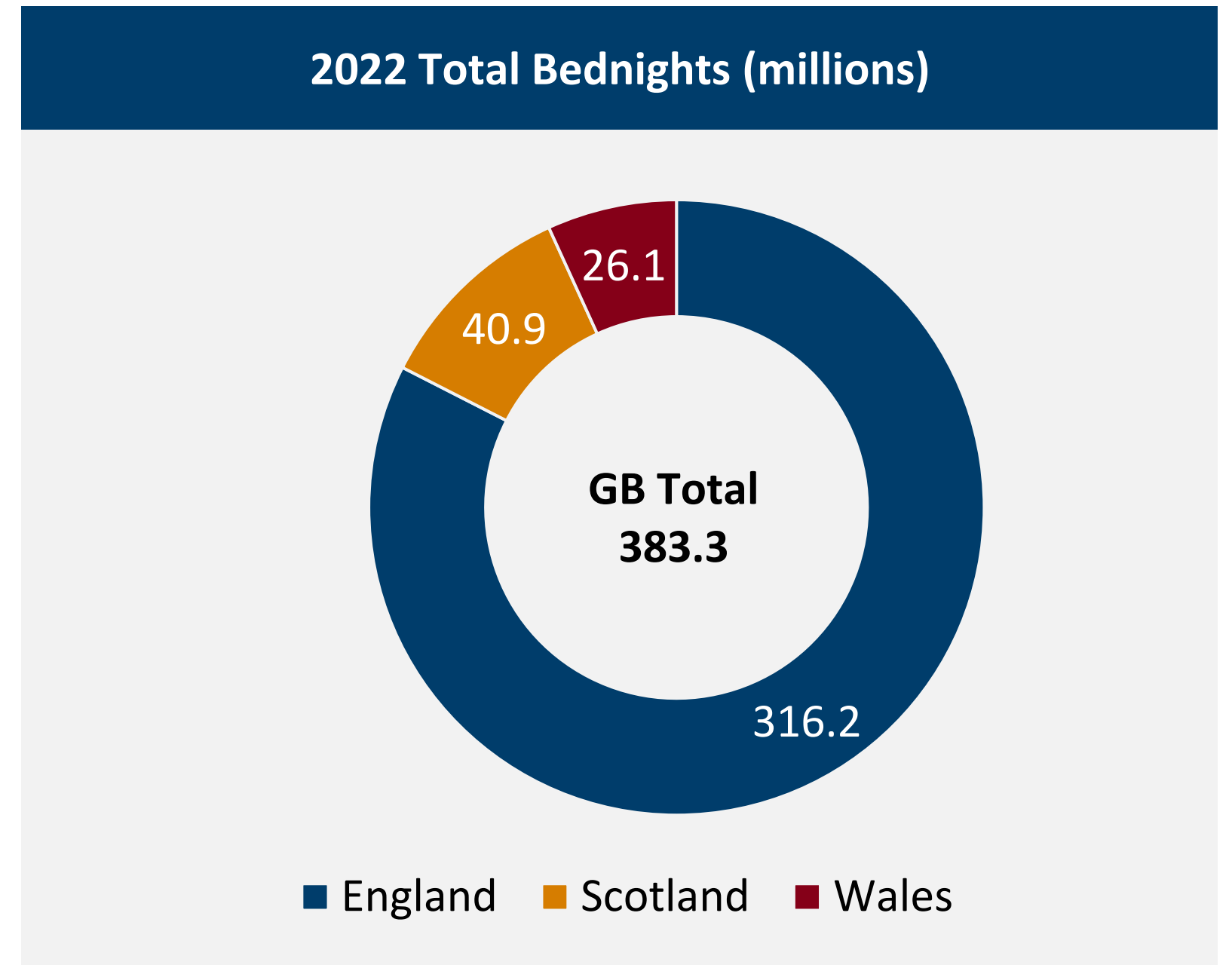
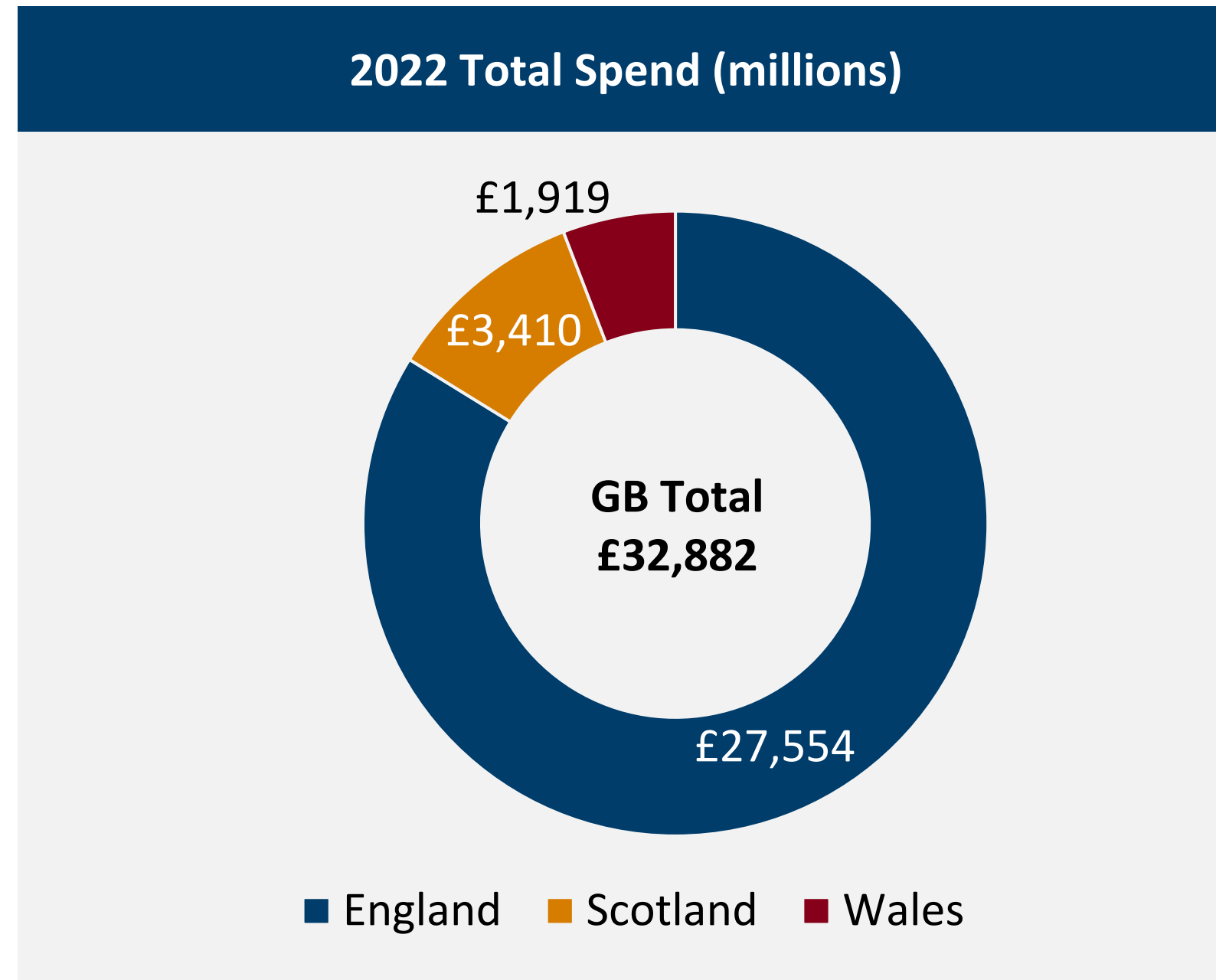
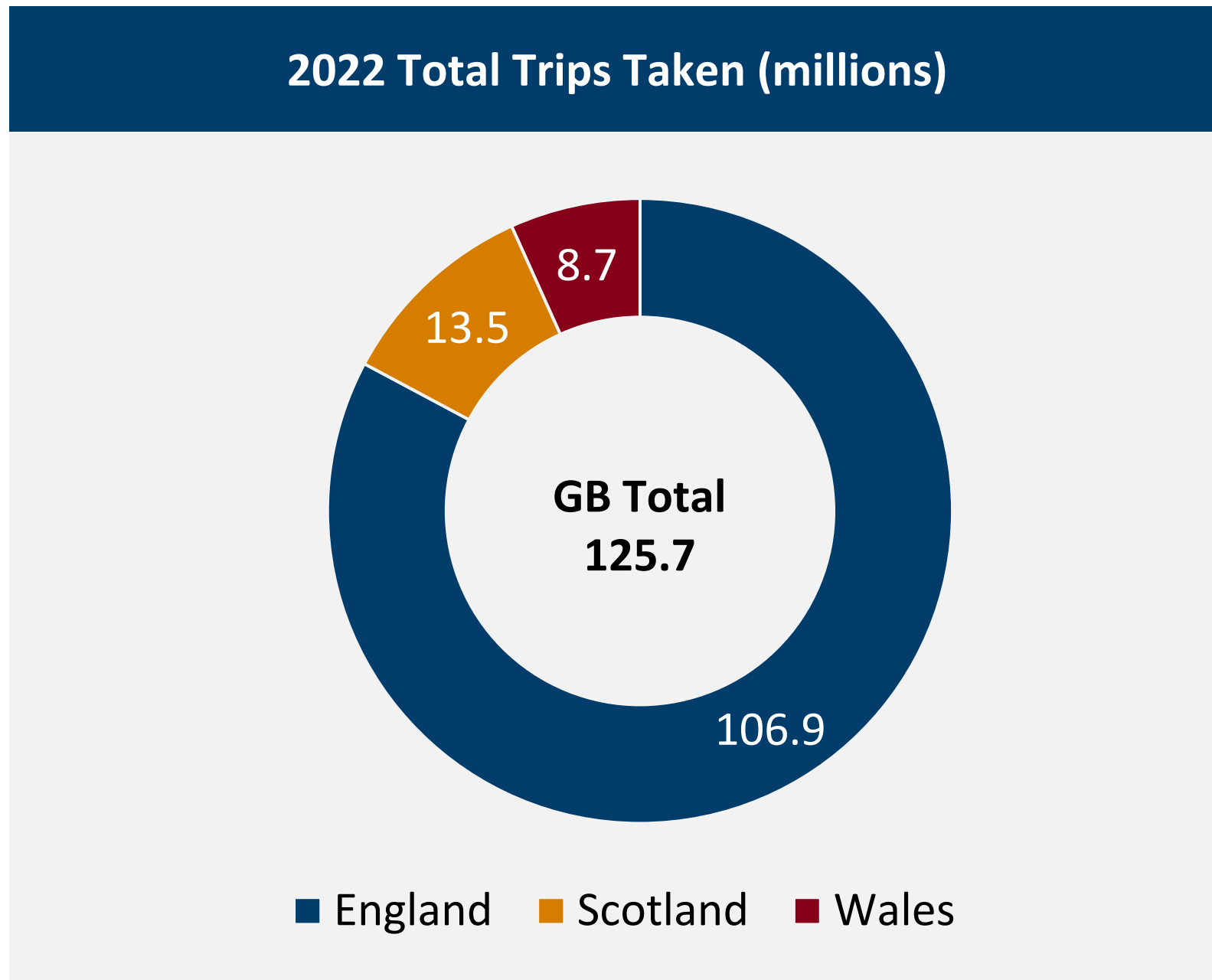
Summary



Summary of findings

- There were 125.7 trips to Great Britain in 2022. This represents a 16% increase, when comparing April to December 2021 and April to December 2022.
- There were 8.71 million trips to Wales in 2022, most of which were for visiting friends and relatives or holidays. There was an increase in miscellaneous trips throughout 2022 as more people travelled internationally (miscellaneous trips include domestic trips as part of an overseas trip).
- There was an increase of 13% in the volume of trips from April to December 2022, with 7.02 million trips taken in Wales, compared to 6.21 million during the same period in 2021.
- The effects of inflation were clear, with average spend per domestic overnight trip to Great Britain rising from £230 in 2021, to £268 in 2022.
- The average number of nights spent on a trip in Great Britain dropped to 3.1 in 2022, in contrast to other nations, holiday trips to Wales were also impacted by this trend towards shorter trips, with 9 percentage point decrease for holiday trips lasting 4+ nights. Sentiment reports found that some Great Britain residents would reduce the length of their domestic trips due to the rising cost of living. It is also possible that the shorter duration of trips is due to the return of international travel.
- While South East Wales was the most popular destination in Wales, it also had the lowest average spend (£194) and the shortest average duration (2.4) of trips. North Wales, represents 3 in 10 trips to Wales but had the highest average spend (£247) and the longest average duration (3.8). England residents take the majority of trips to Wales, stay longer than Wales residents and spend more.
- Trips to each location type remained largely static between 2021 and 2022, however, cities and large towns became more popular for trips to see friends and relatives (+8pp) and trips to the countryside/village became more prevalent for holidays (+8pp) in 2022.
- Spend across all major categories increased in 2022 (April to December), when compared to 2021. Package (+48%), eating and drinking out (+43%), accommodation (+34%) and travel costs (+23%) may all have been impacted by inflation.
- Holiday trips to Wales in 2022 were booked well in advance, with at least half being booked two or more months before the trip. This represents a 13 percentage point increase on 2021. When looking at all trip types to Wales in 2022, advance booking of two months or more was most likely in Q4. This may be due to the uptick in package holidays in this period.
- Staying in a hotel was the most common type of accommodation used on overnight trips in Wales, followed by caravan/camping/glamping, which is much more popular in Wales than other nations. The type of accommodation used varied by trip purpose, and 4 in 10 holiday trips stayed in a caravan/camping/glamping in 2022. Accommodation choice is also determined by lifestage, with pre-nesters having a stronger preference for serviced accommodation.

2022 GB overnight tourism statistics at a glance



Nation	Average Spend per Trip 2022
GB	£262
England	£258
Scotland	£253
Wales	£220

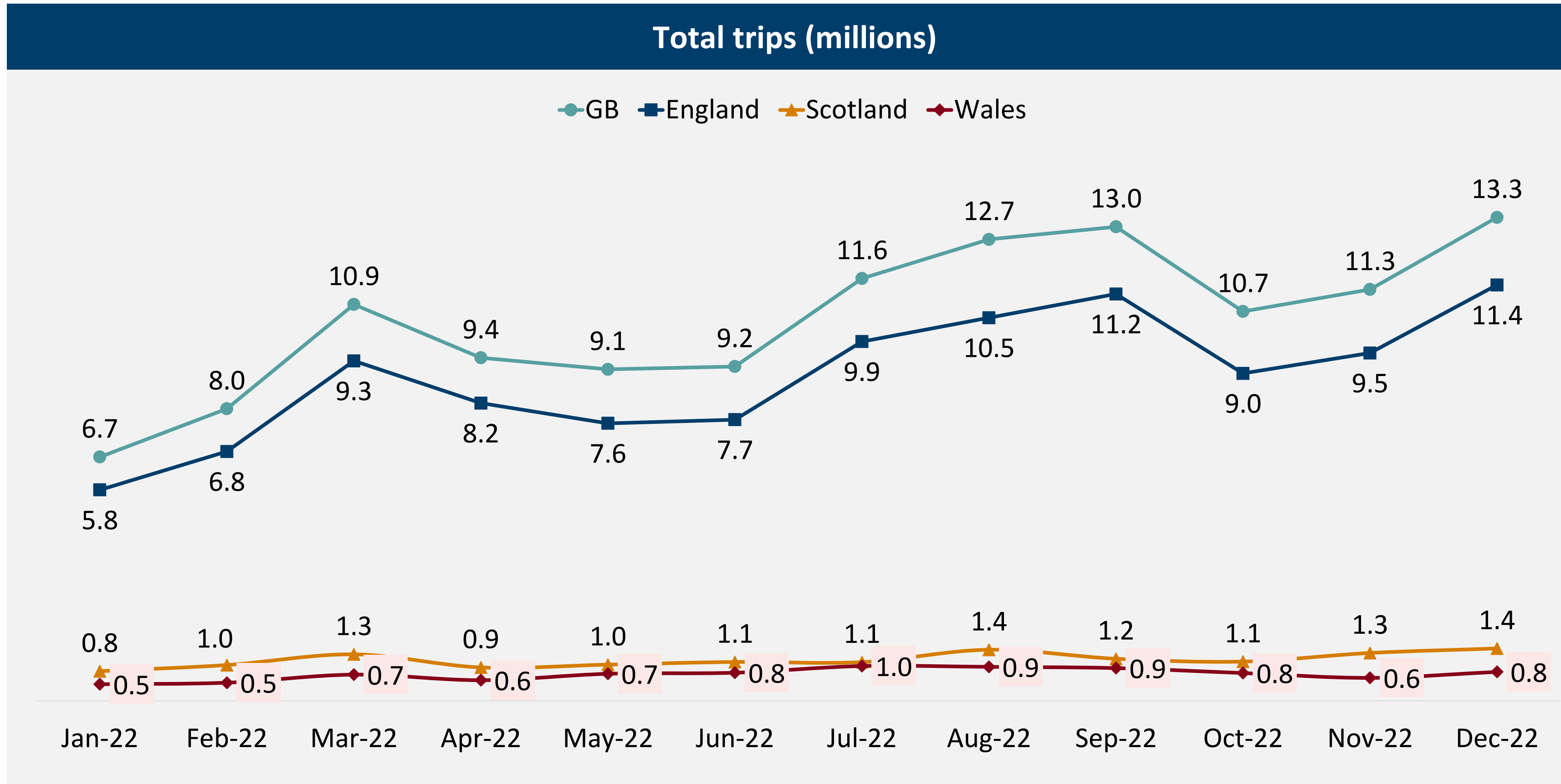
Nation	Average Spend per Night 2022
GB	£86
England	£87
Scotland	£83
Wales	£74

Nation	Average Nights per Trip 2022
GB	3.0
England	3.0
Scotland	3.0
Wales	3.0

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Domestic overnight trips by month in 2022

December 2022 experienced peak tourism in Great Britain with 13.3 million trips taken, this was largely fueled by trips to visit friends and family and attending celebrations around the Christmas period. A more unusual peak in March 2022 may be explained by the removal of the final COVID-19 restrictions in late February 2022, as part of the 'Living with Covid' plan.

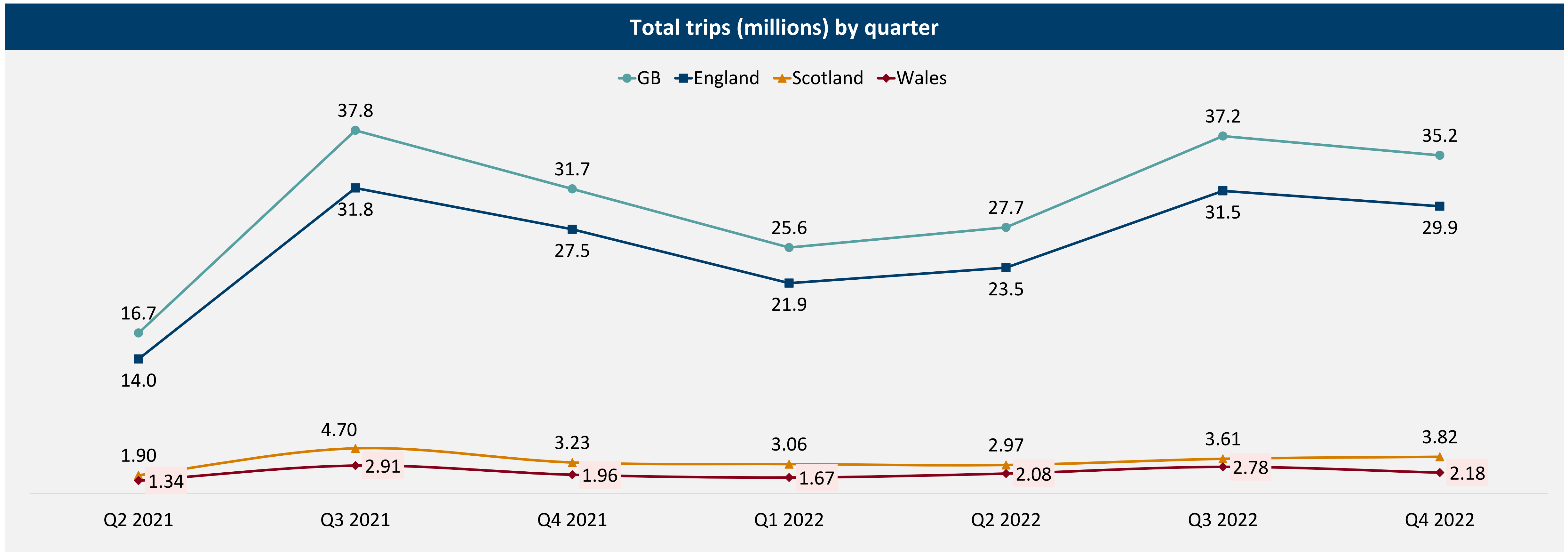


Nation	Number of trips 2022 (millions)	Proportion of trips 2022
GB	125.7	
England	106.9	85%
Scotland	13.5	11%
Wales	8.7	7%

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Domestic overnight trips by quarter in 2022

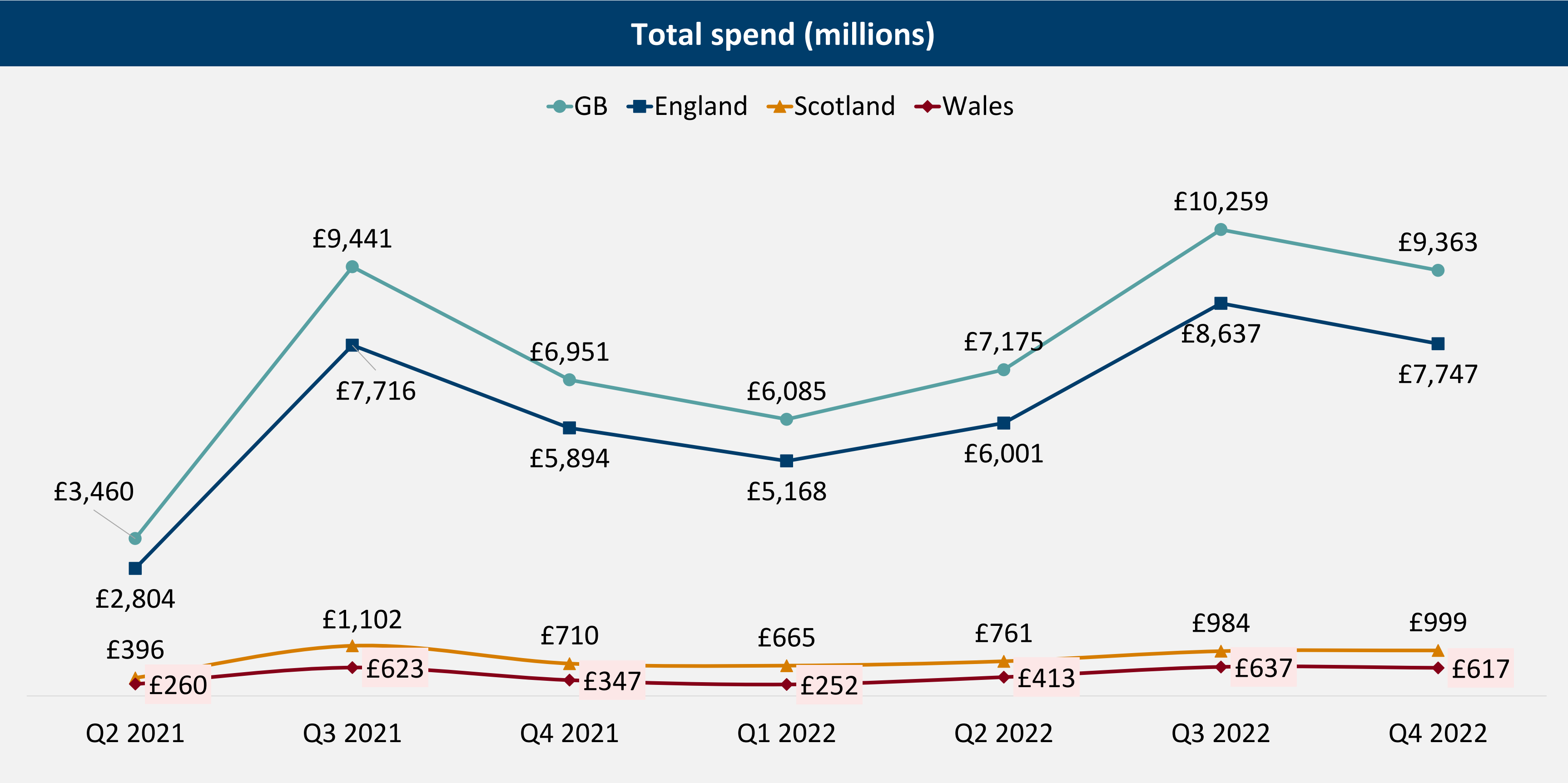
Overall, Q3 2021 experienced the highest number of domestic trips to each nation, as COVID-19 lockdowns ended but international travel was still somewhat restricted. As consumers returned to cities and large towns during Q4 2022, overnight trips increased across all nations, when compared to Q4 in 2021.



Source: Great Britain Domestic Overnight Tourism Survey 2022
Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Total trip spend by quarter 2021-2022

The Summer (Q3) of 2022 saw record spend on domestic trips to Britain (since the beginning of the new statistics in April 2021). Scotland experienced a slight uptick in spend in Q4 2022 due to increases in business trips and spend on personal events and celebrations.

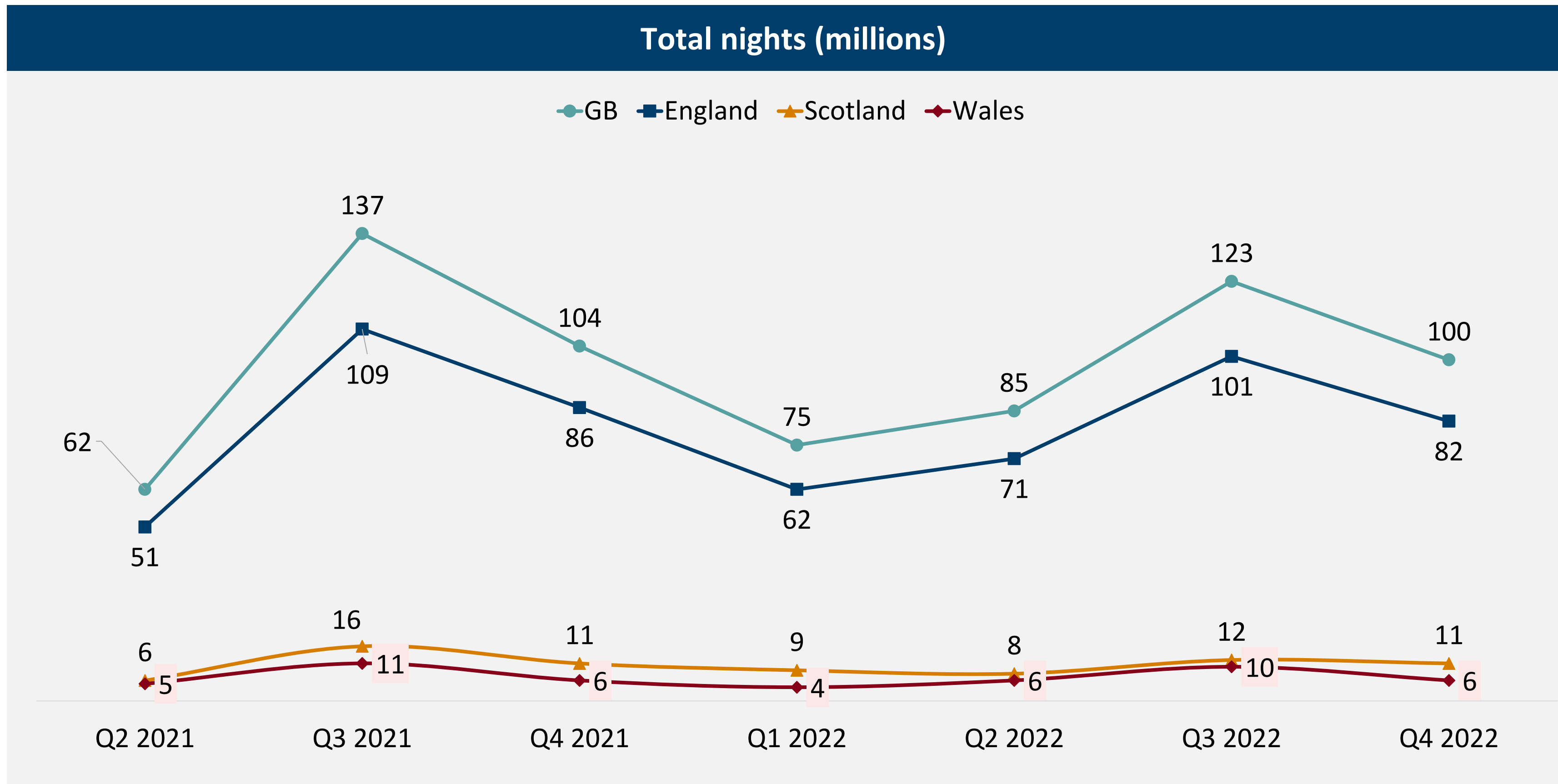


Nation	Total spend 2022 (millions)	Proportion of spend 2022
GB	£32,882	
England	£27,554	84%
Scotland	£3,410	10%
Wales	£1,919	6%

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Nights spent on a trip by quarter 2021-2022

When comparing to equivalent quarters in 2021, there's a general downward trend for nights spent on a domestic trips to all nations in 2022. This reflects a move to shorter trips to see friends and family and shorter business trips. These changes may be in response to the cost-of-living crisis. Sentiment Trackers commissioned by VisitBritain throughout 2022 indicated that circa 15% of respondents would reduce the number of nights spent on a trip in response to the cost-of-living crisis.

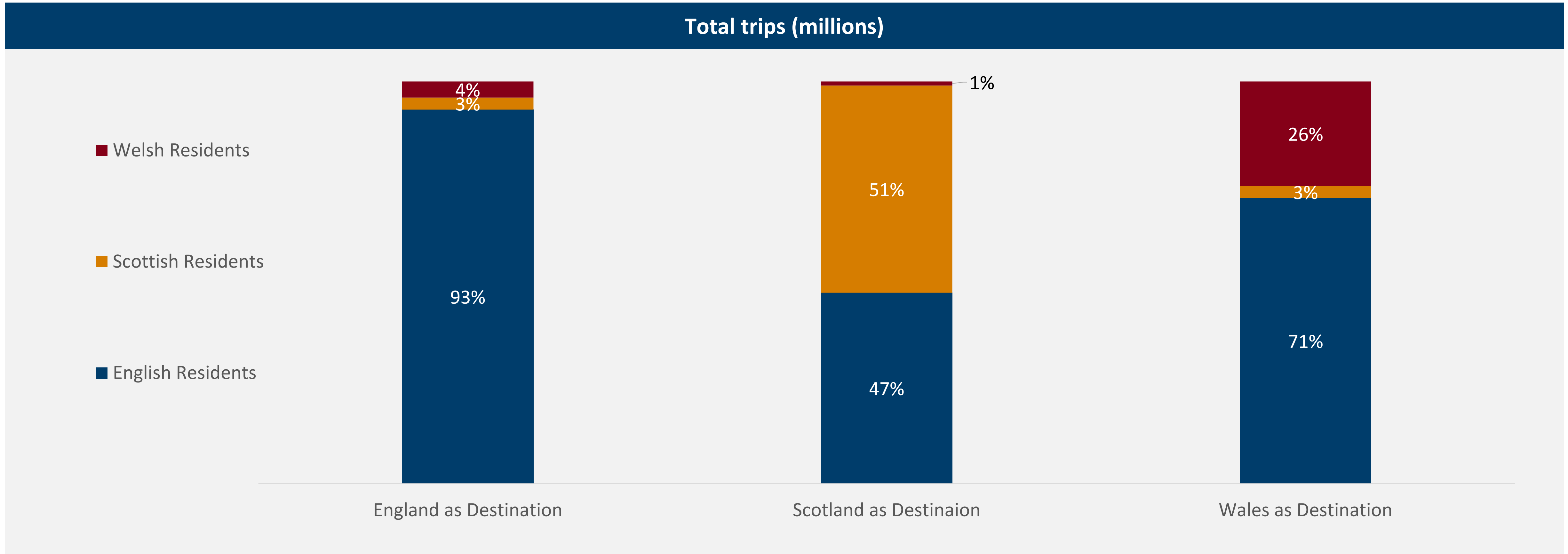


Nation	Total nights 2022 (millions)	Proportion of nights 2022
GB	383.3	
England	316.2	82%
Scotland	40.9	11%
Wales	26.1	7%

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Nation of residence by nation of destination in 2022

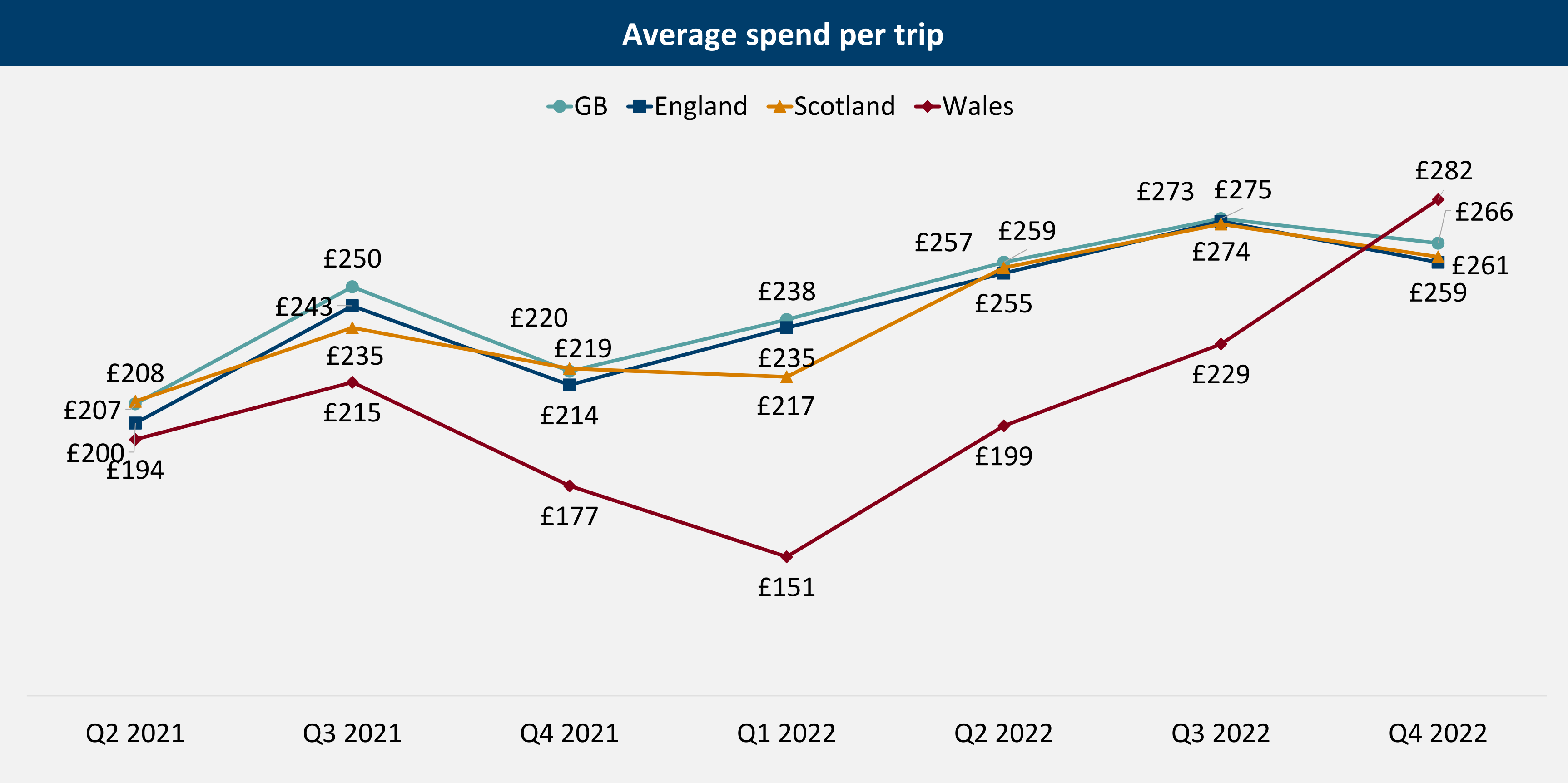
Wales experiences the most cross-nation tourism with the majority of trips coming from England. Tourism to Scotland is almost equally split among Scottish residents and non-residents, while less than 1 in 10 trips to England were from other British nations. While there's been no major change in inter-nation travel since 2021, it's important to note that trips to other nations tend to have a higher average spend than trips in the home nation.



Source: Great Britain Domestic Overnight Tourism Survey 2022
Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Average spend per trip 2021-2022

Average spend per trip increased across the board in 2022, in line with the rising cost of living. The annual rate of inflation reached a 41 year high of 11.1% in October 2022. When comparing equivalent quarters, average spend in England Q4 2022 is 21% higher than Q4 2021.

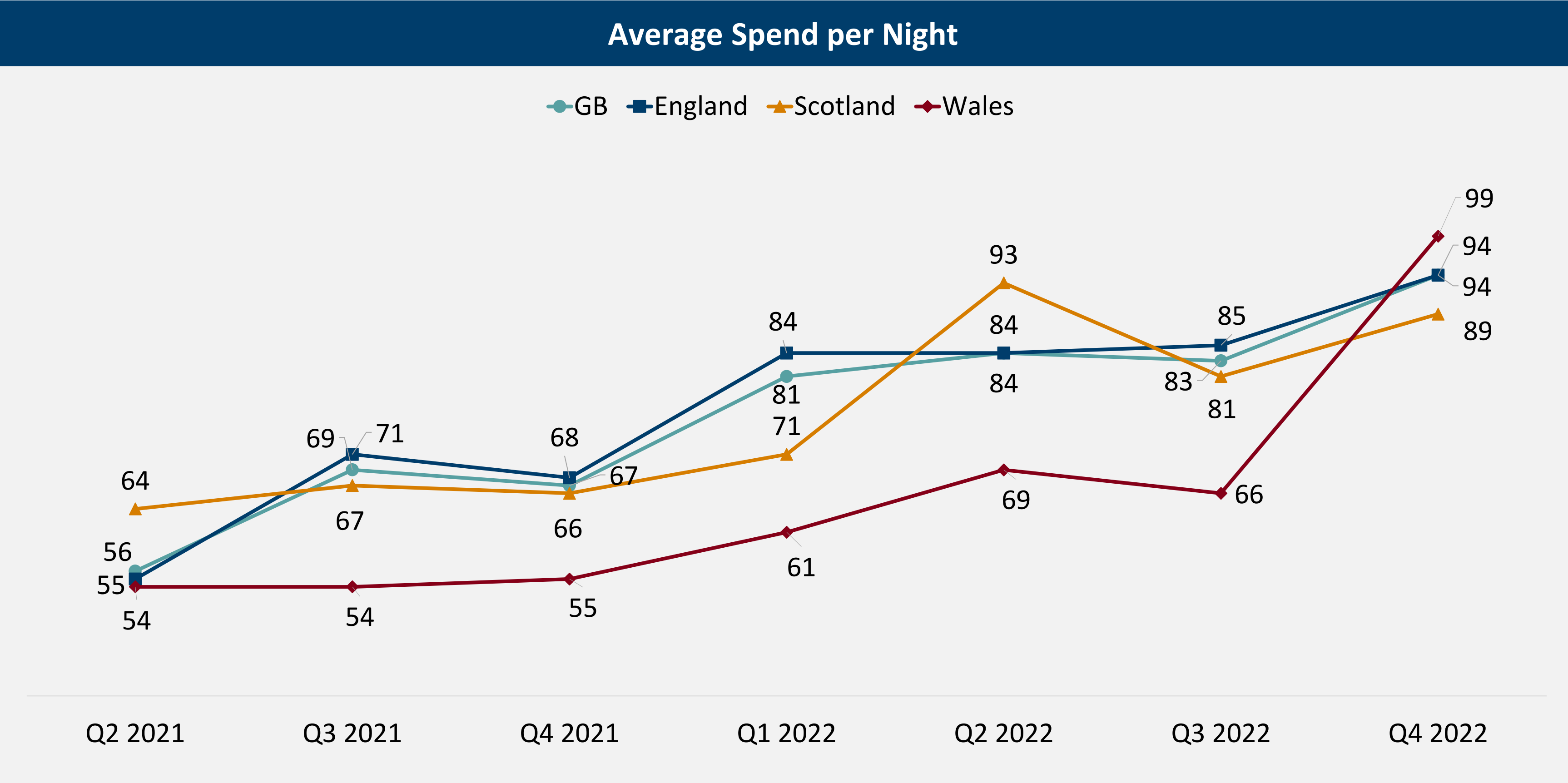


Nation	Average spend per trip 2021 (April to December)	Average spend per trip 2022 (April to December)
GB	£230	£268
England	£224	£264
Scotland	£225	£264
Wales	£198	£237

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Average spend per night 2021-2022

As the number of nights per trip reduced and overall spend increased, the average spend per night also increased throughout 2022. Scotland's peak in Q2 2022 is largely due to a particularly high spend of £102 per night in April during the Easter holidays.

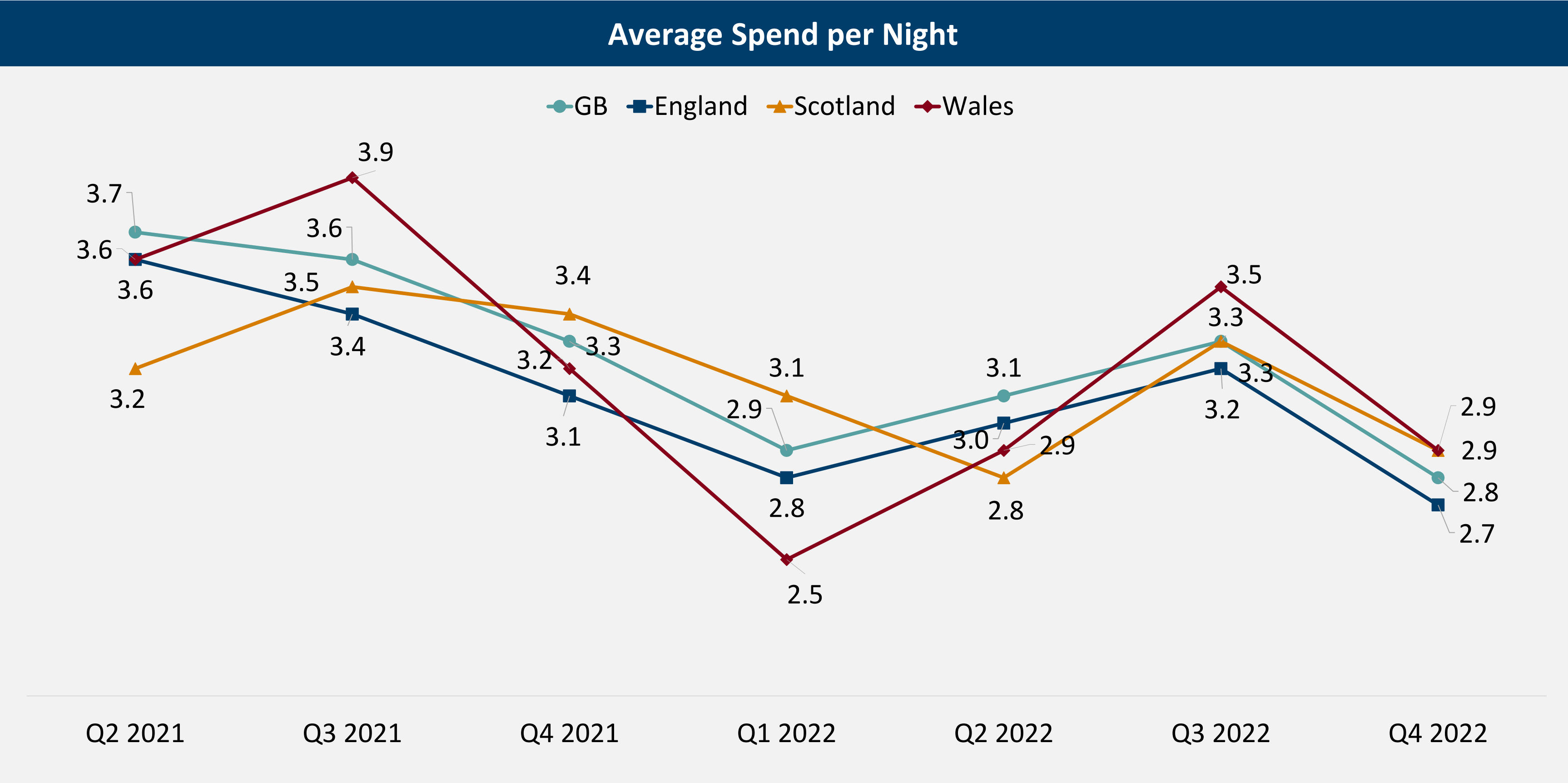


Nation	Average spend per night 2021 (April to December)	Average spend per night 2022 (April to December)
GB	£66	£87
England	£67	£88
Scotland	£66	£87
Wales	£54	£76

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Average nights per trip 2021-2022

Average nights per trip fell across all nations in 2022, with quarter-on-quarter decreases for all nations. When comparing 2021 (April to December) and 2022 (April to December) there's an 11% decrease in average nights spent on a trip. This may be in response to rising inflation during 2022, and the recovery of outbound international travel, whereby Great Britain residents were taking shorter domestic trips in order to take more trips abroad.



Nation	Average nights per trip 2021 (April to December)	Average nights per trip 2022 (April to December)
GB	3.5	3.1
England	3.4	3.0
Scotland	3.4	3.0
Wales	3.7	3.1

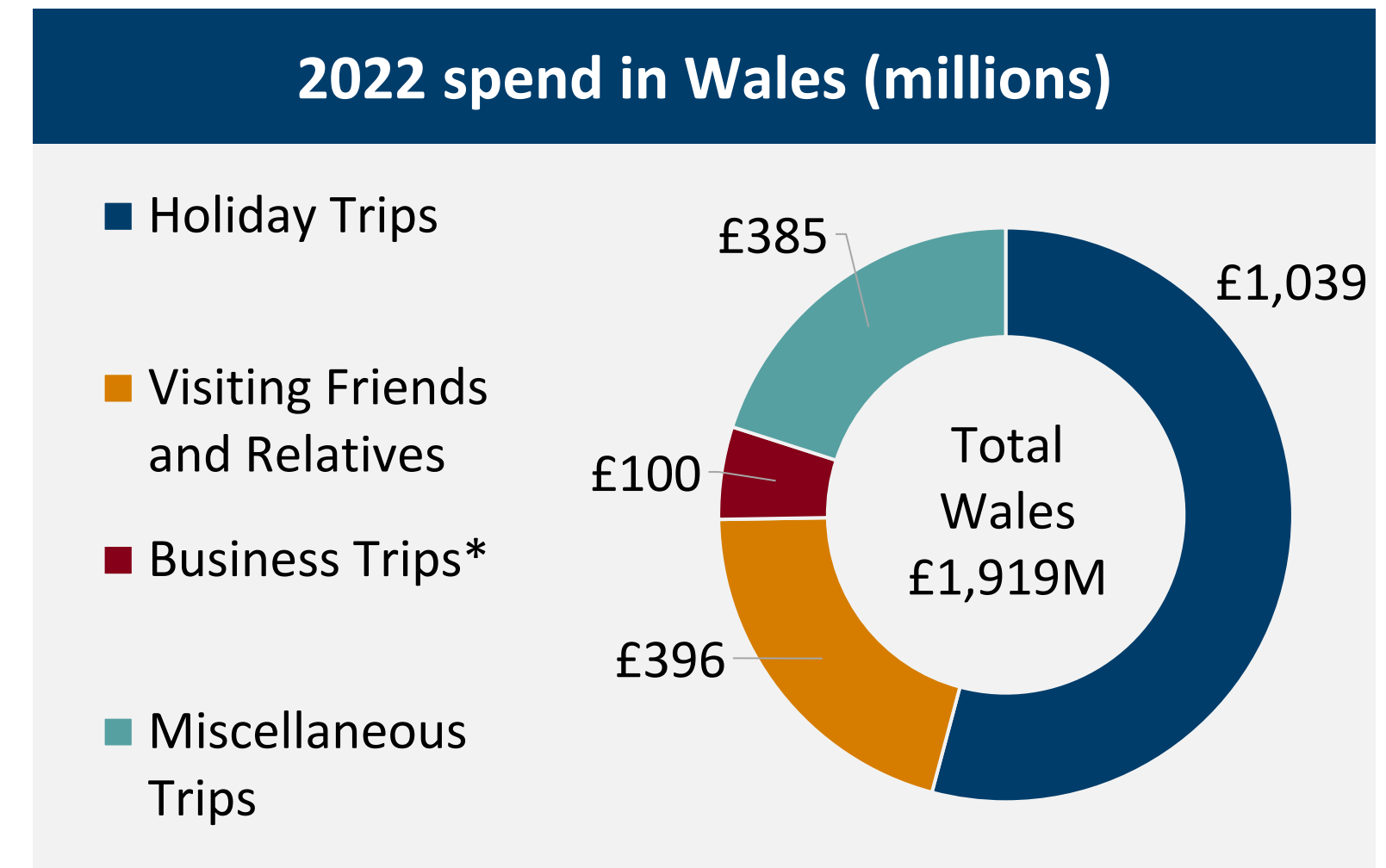
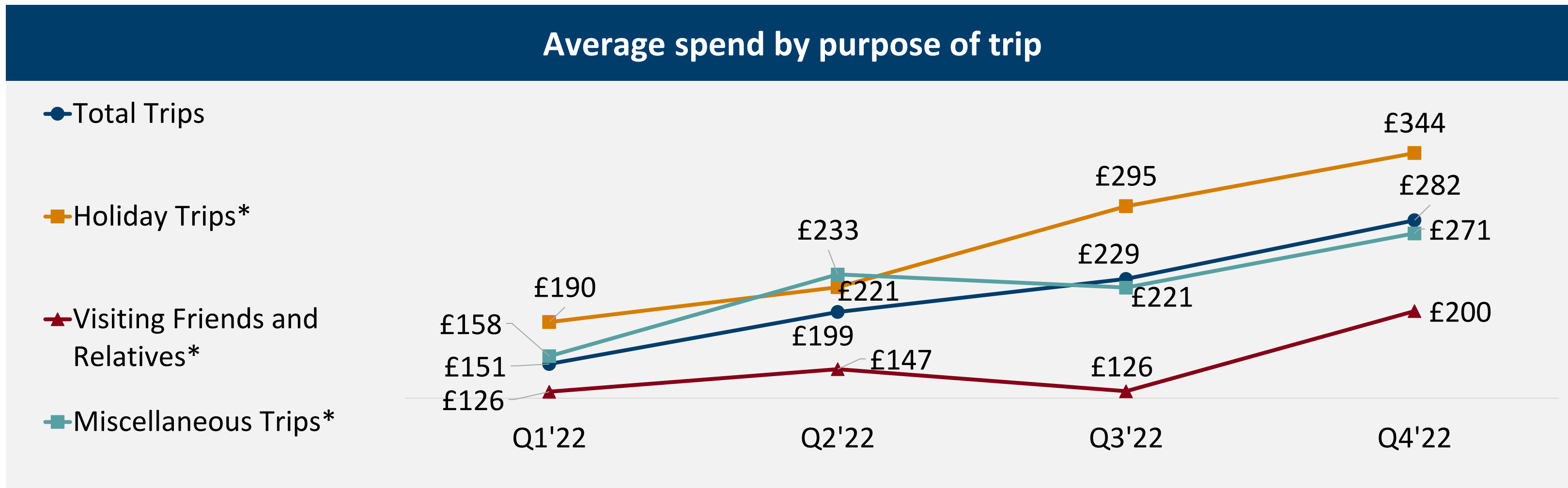
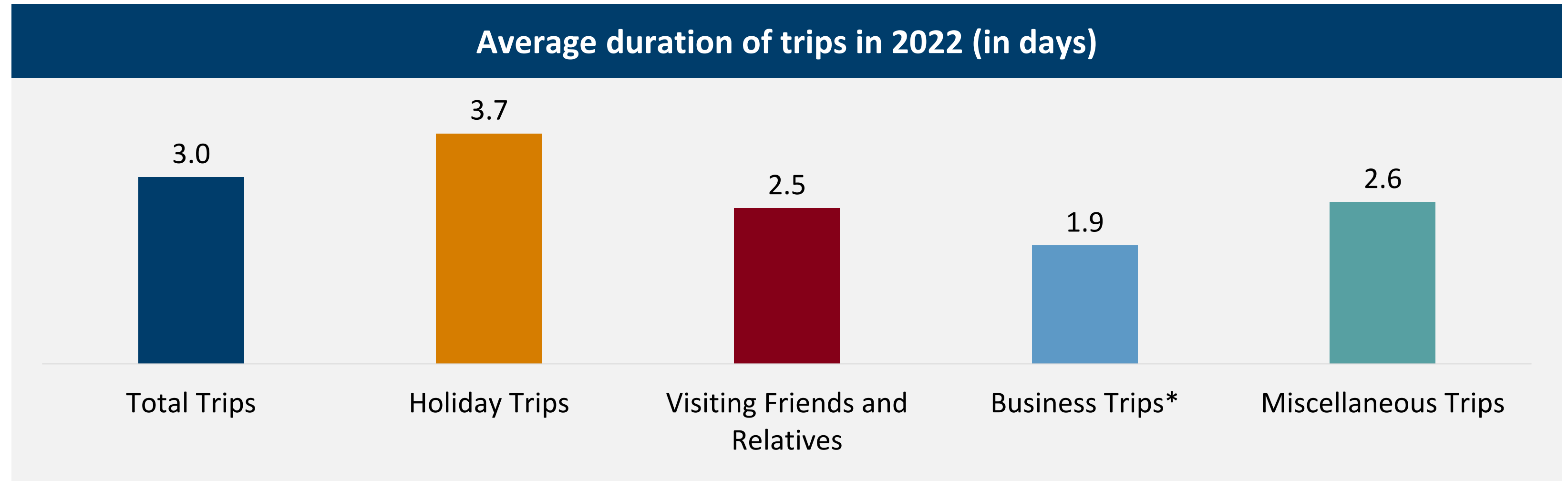
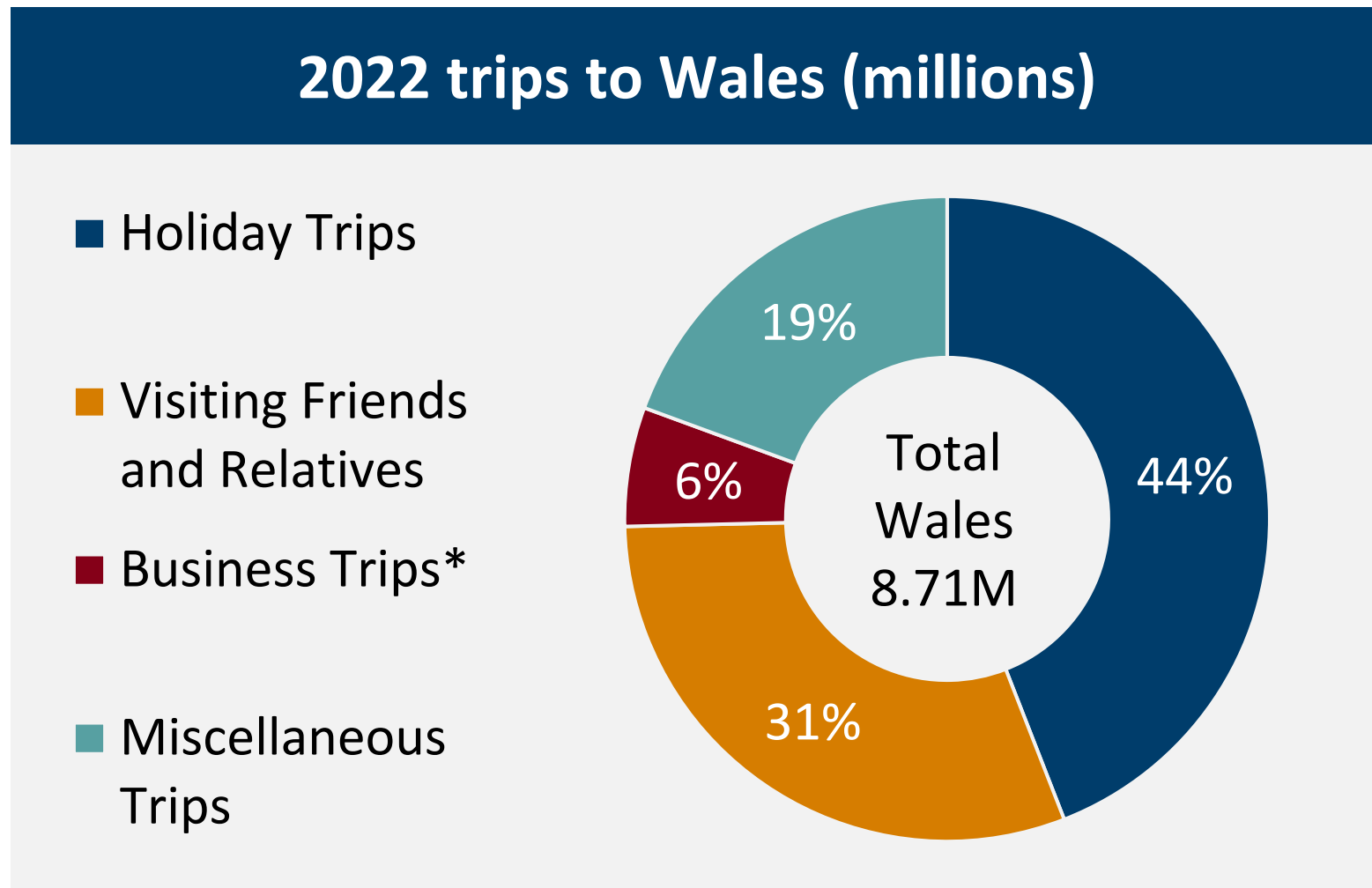
Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Wales Trips

Domestic Overnight Trips to Wales 2021-2022



Summary of overnight trips to Wales in 2022



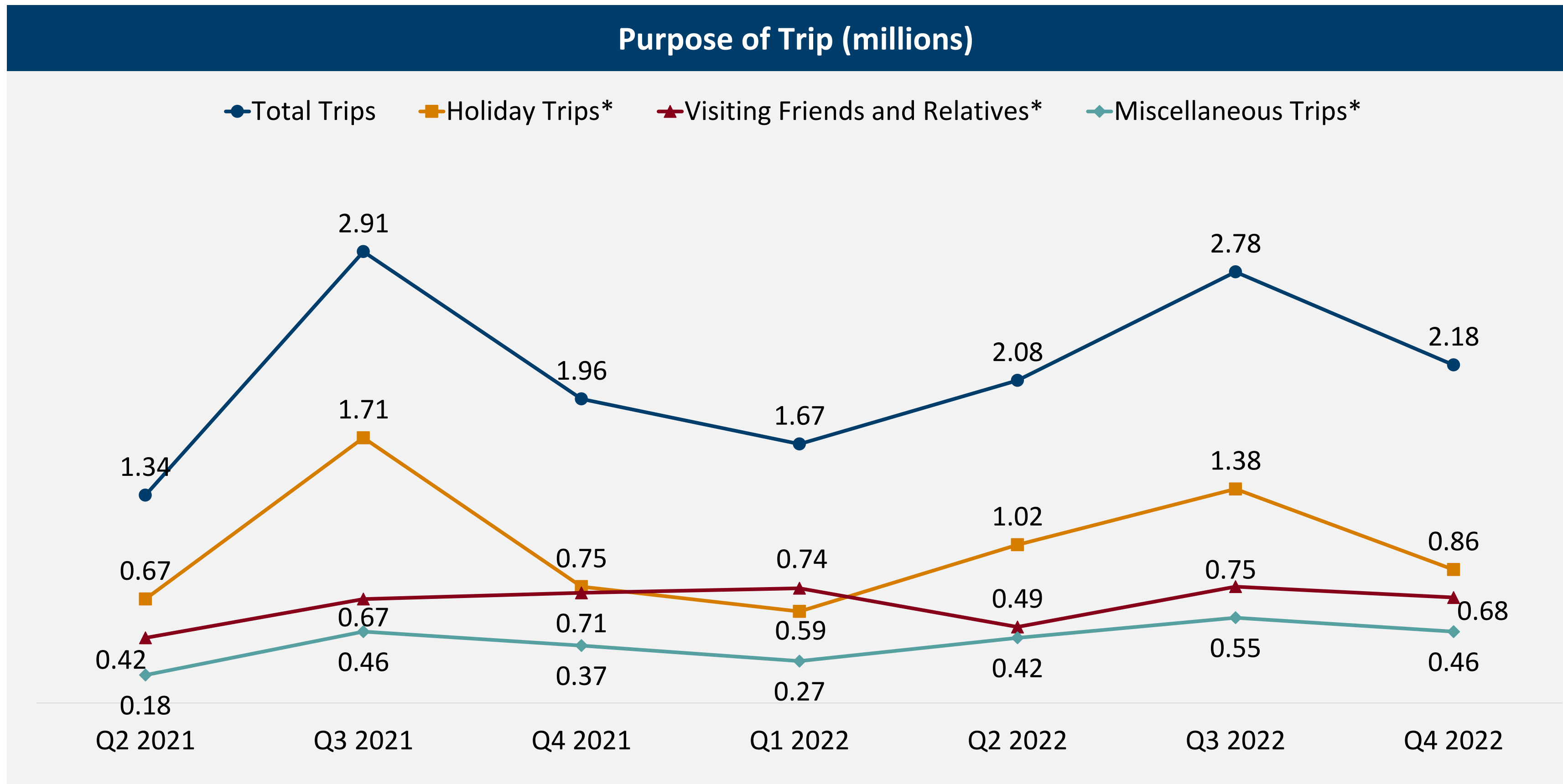
* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Some base sizes are low only at the quarterly level.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Overnight trip purpose by quarter

Holiday trips and visiting friends and family remain the most common reasons for taking an overnight trip to Wales in 2022. The proportion of miscellaneous trips to Wales increased by 4 percentage points in 2022, as more people traveled internationally (miscellaneous trips include domestic trips as part of an overseas trip). Similar to Scotland, the summer peak for holiday trips to Wales was significantly lower than in 2021.



Purpose	Number of Trips 2022 (millions)	Proportion of Trips
Total Trips	8.71	
Holiday Trips	3.84	44%
Visiting Friends and Relatives	2.66	31%
Business Trips*	0.52	6%
Miscellaneous Trips	1.69	19%

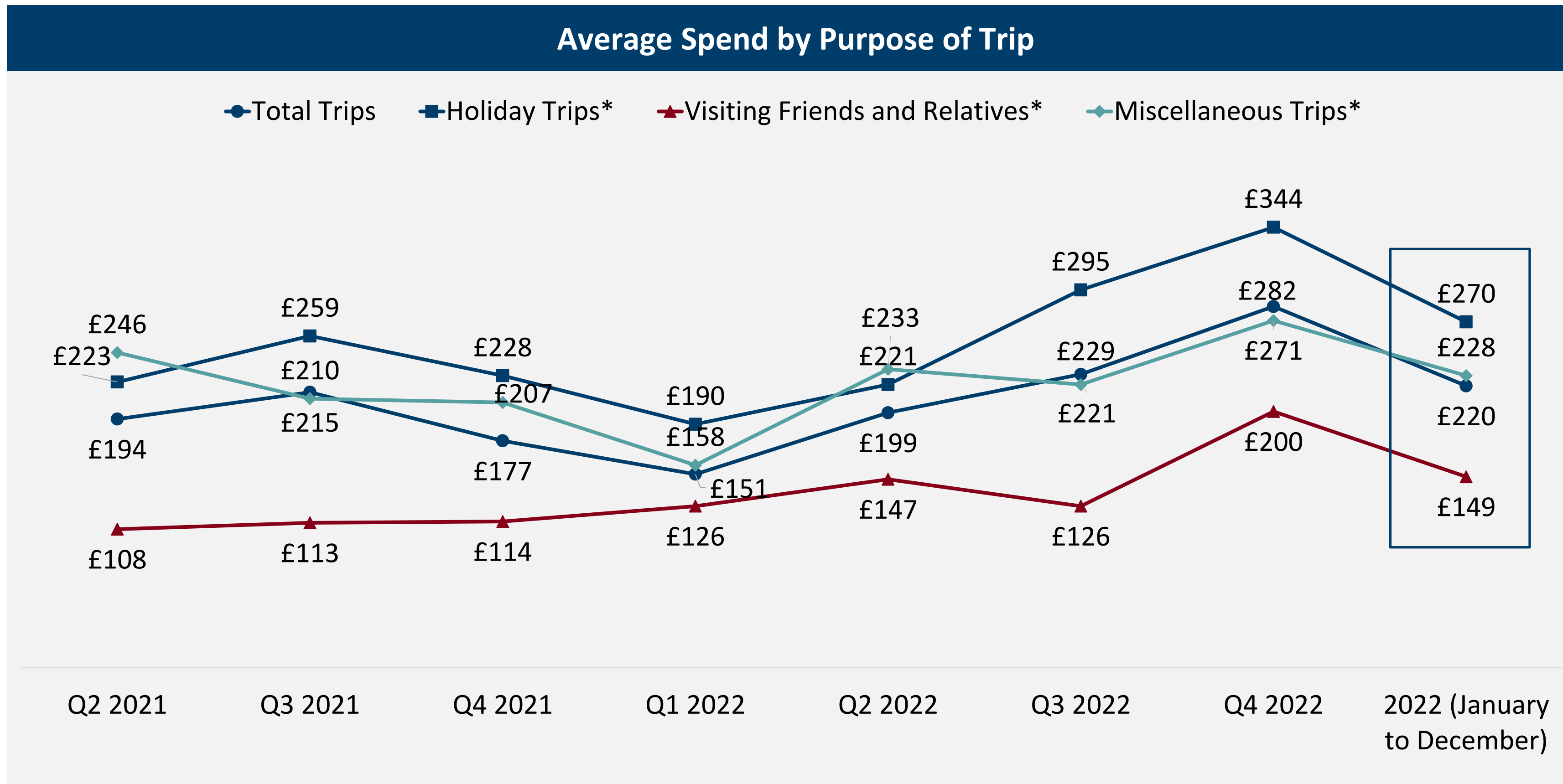
* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Quarterly business trips have been excluded as base sizes under 30.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Average spend by trip purpose

All trip types in 2022 experienced an increase in average spend per trip. Average spend on visiting friends and relatives increased by 40% between 2021 (April to December) and 2022 (April to December), this trend is seen across Great Britain and may be due to inflation or related to the increase in these trip types taking place in cities and large towns (which are higher spend locations).



Purpose	Average Spend 2021 (April to December)	Average Spend 2022 (April to December)
Total Trips	£198	£237
Holiday Trips	£244	£285
Visiting Friends and Relatives	£112	£157
Business Trips*	£174	£213
Miscellaneous Trips	£215	£241

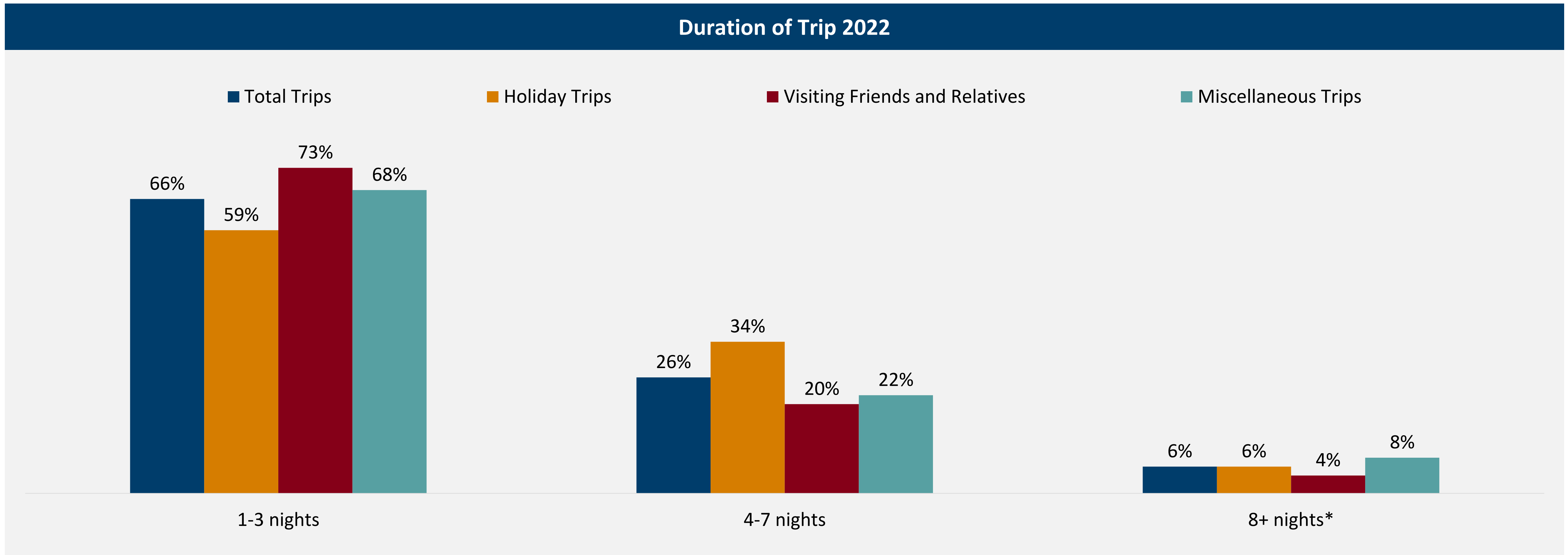
* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Quarterly business trips have been excluded as base sizes under 30.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Duration of trip

The majority of trips to Wales in 2022 lasted 3 nights or less. The duration of overnight trips reduced across all nations in 2022 (April to December), when compared to 2021 (April to December). In contrast to other nations, holiday trips to Wales were also impacted by this trend towards shorter trips, with 9 percentage point decrease for holiday trips lasting 4+ nights.



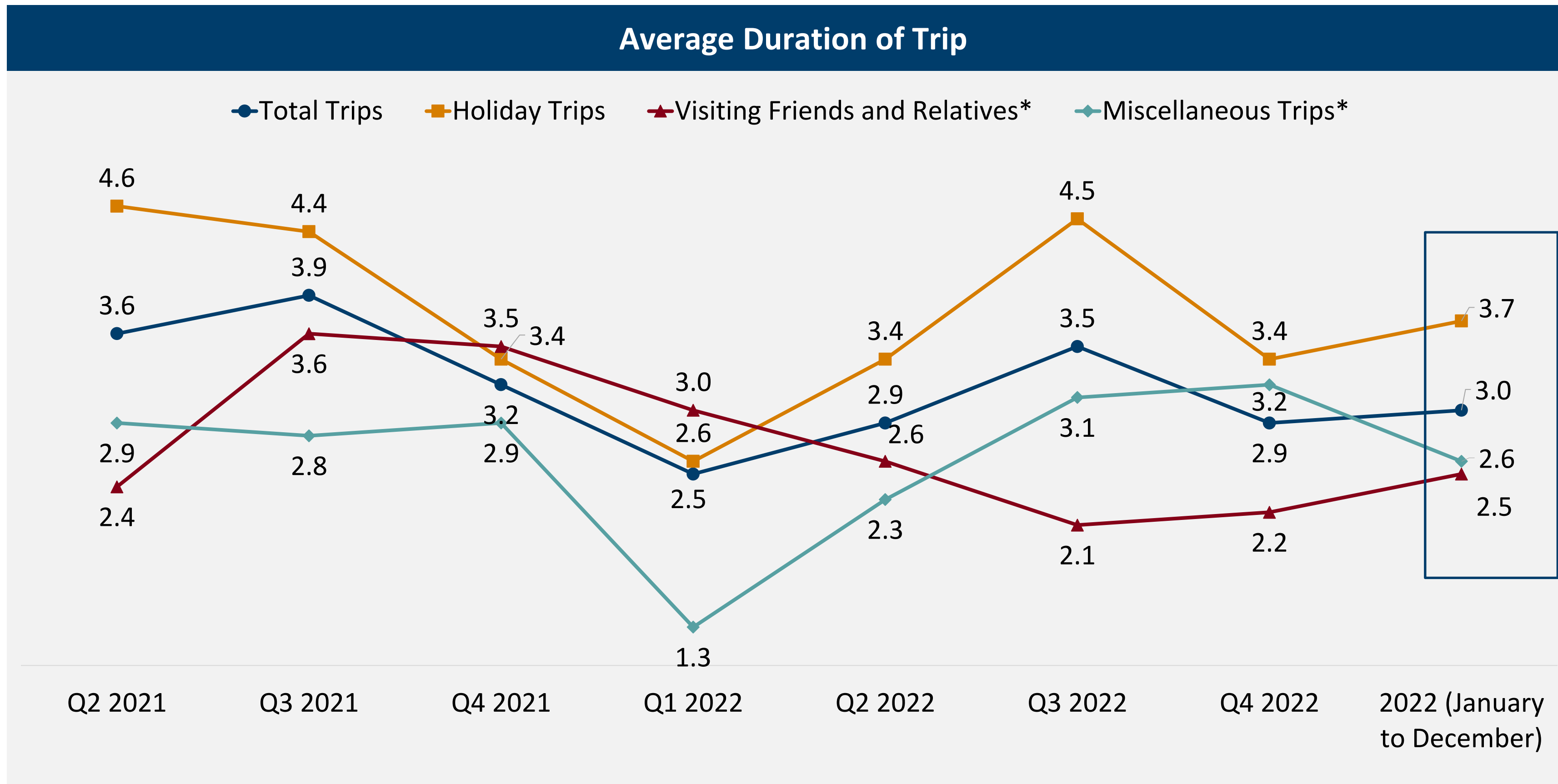
* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. 3% or less not shown

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Average duration of trip by quarter

Overall, the average duration of trips for all purposes in Wales dropped in 2022. Visiting friends and relatives and business trips were most impacted by this shift. While holiday trips are shorter, on average, for 2022, the summer period was unaffected with the average duration remaining stable at 4.5 days per trip, when compared to Q3 2021.



Trip Purpose 2022	Average Duration 2021 (April to December)	Average Duration 2022 (April to December)
Total Trips	3.7	3.1
Holiday Trips	4.2	3.9
Visiting Friends and Relatives	3.3	2.3
Business Trips*	2.8	2.0
Miscellaneous Trips	2.9	2.9

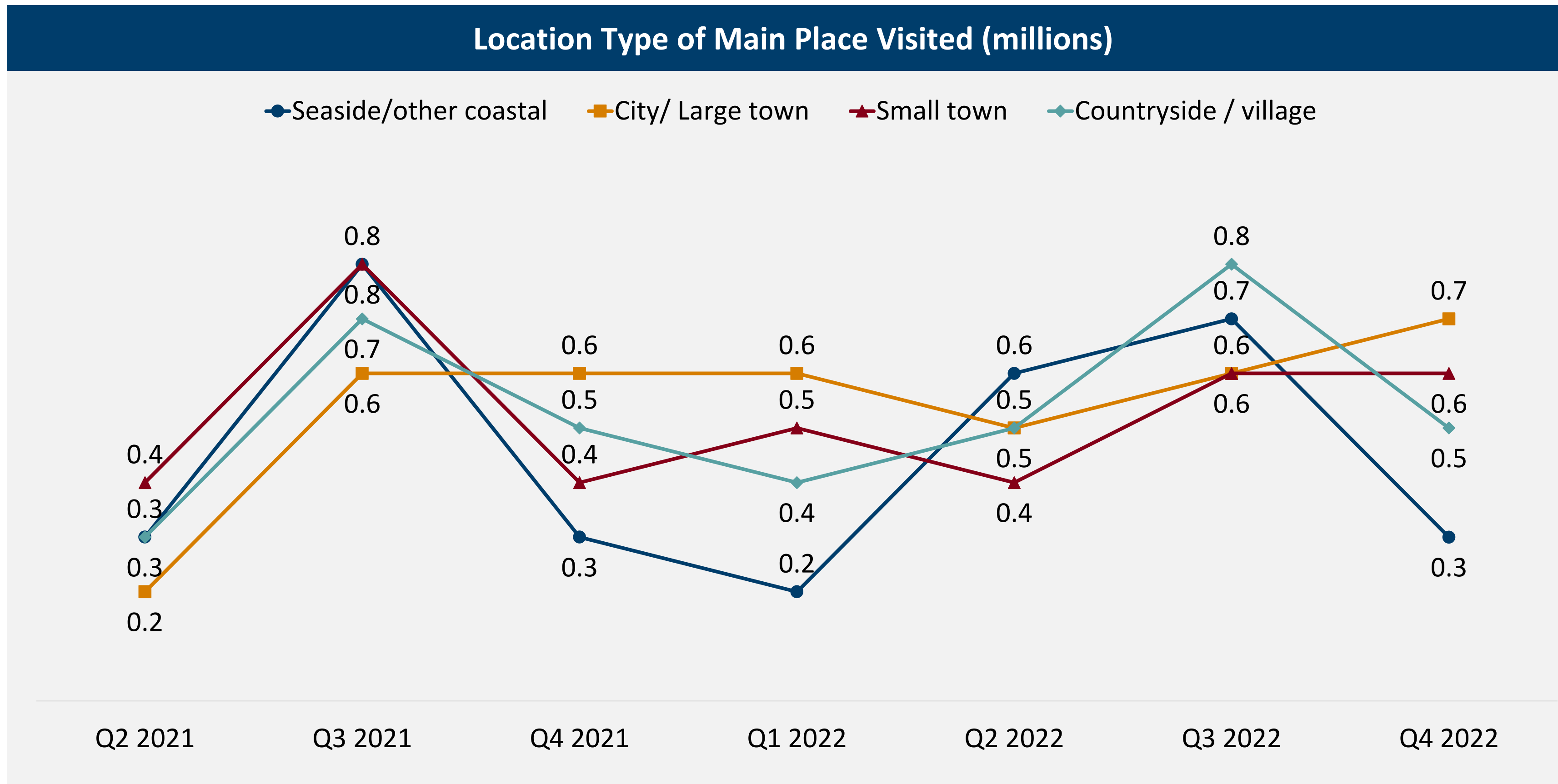
*Base size is between 30 and 100, it is recommended to only use the estimates as indicative.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Location type of main place visited overnight

Trips to Wales were almost equally popular for all location types (e.. large city and countryside). Trips to each location type remained largely static between 2021 and 2022, however, cities and large towns became more popular for trips to see friends and relatives (+8pp) and trips to the countryside/village became more prevalent for holidays (+8pp), which explains the peak in Q3 2022.



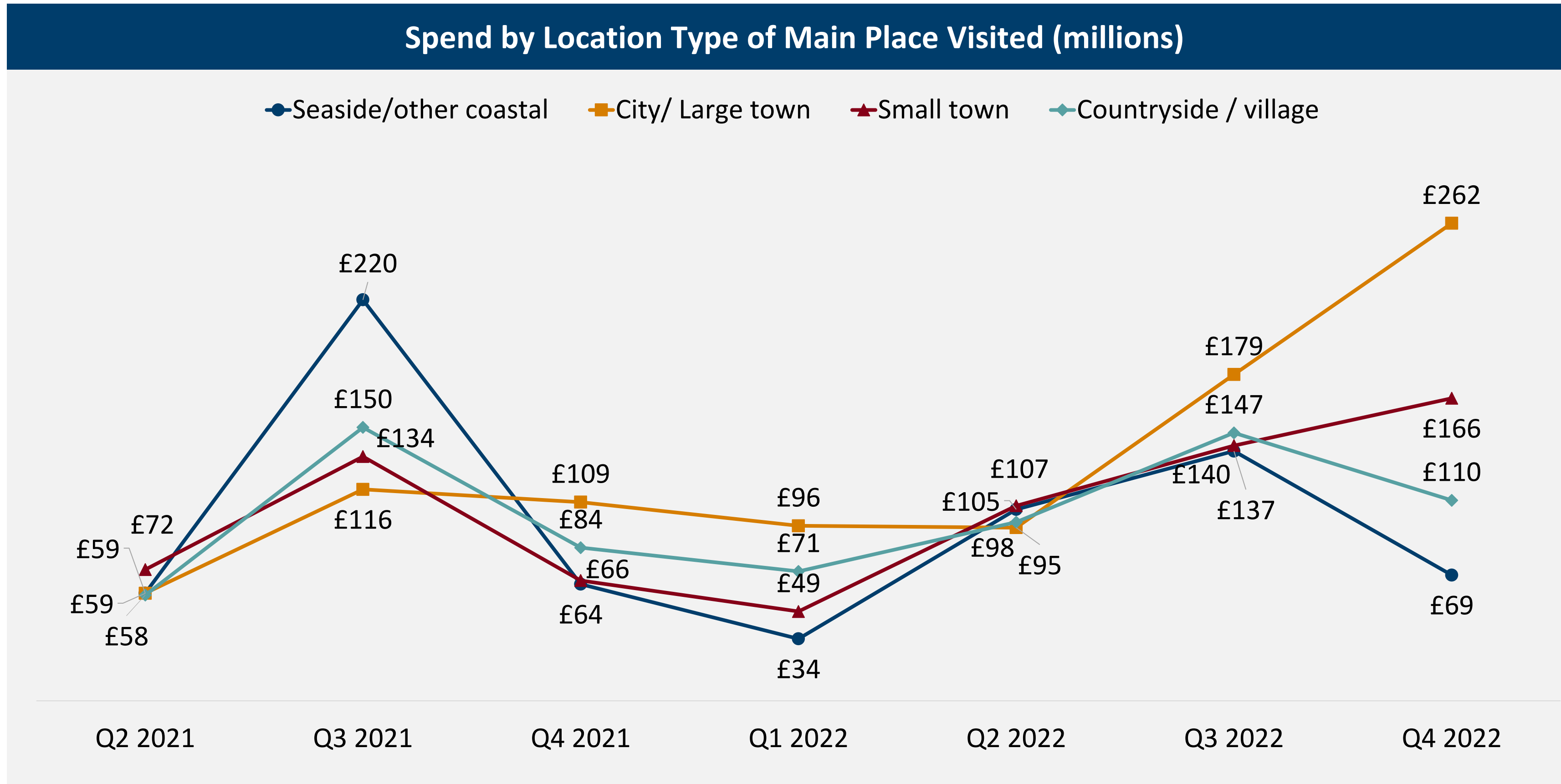
Location Type	Trips 2022 (millions)	Proportion of Trips
Seaside or other coastal	1.7	20%
Large city/ large town	2.4	28%
Small town	2.1	24%
Countryside/ village	2.2	25%

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Spend by location type of main place visited 2022

Spend in large cities and towns rapidly increased in 2022 and represents the biggest share of spend across all location types. There was a significant drop in share of spend at seaside/coastal locations (-9pp) in 2022 (April to December 2022) versus 2021.



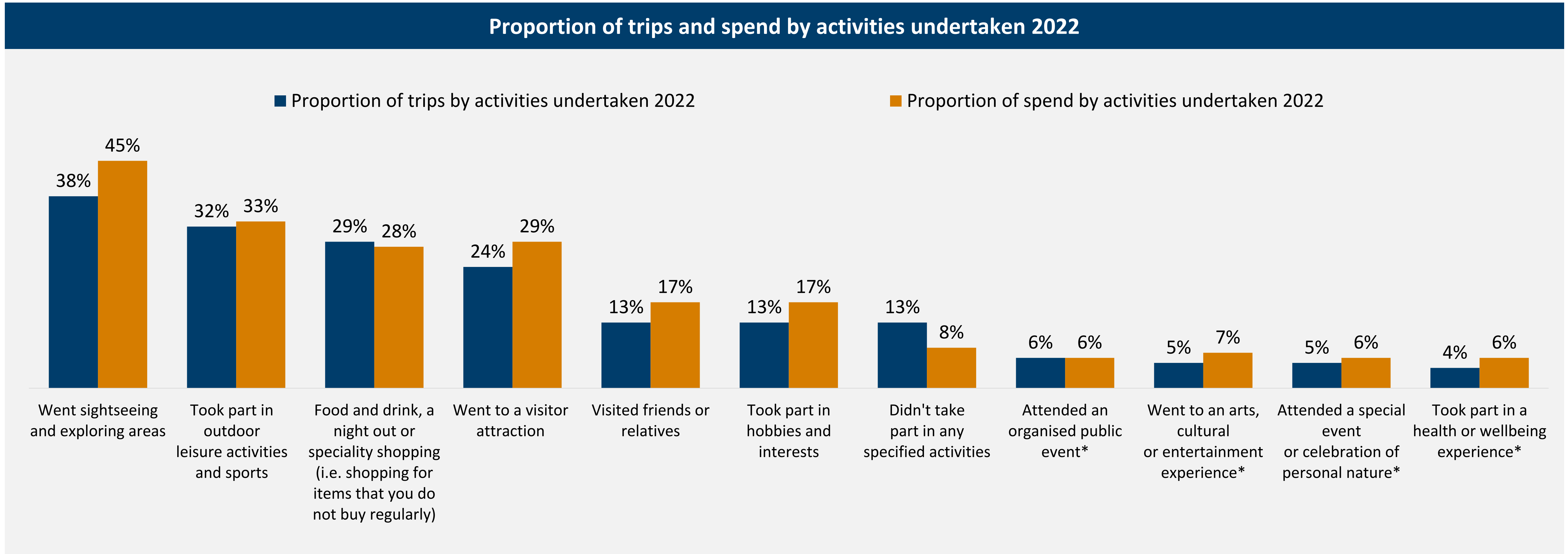
Location Type	Spend 2022 (millions)	Proportion of Spend
Seaside or other coastal	£346	18%
Large city/ large town	£633	33%
Small town	£462	24%
Countryside/ village	£426	22%

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trips and spend by activities undertaken 2022

Trips that included sightseeing and outdoor leisure activities were most popular in Wales in 2022. There was no significant change in the proportion of activities taken on trips between 2021 and 2022, however there was significant decline in trip spend where the main activity was visitor attractions (-11pp), outdoor leisure (-9pp) and food, drink and speciality shopping (-9pp).



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

Source: Great Britain Domestic Overnight Tourism Survey 2022

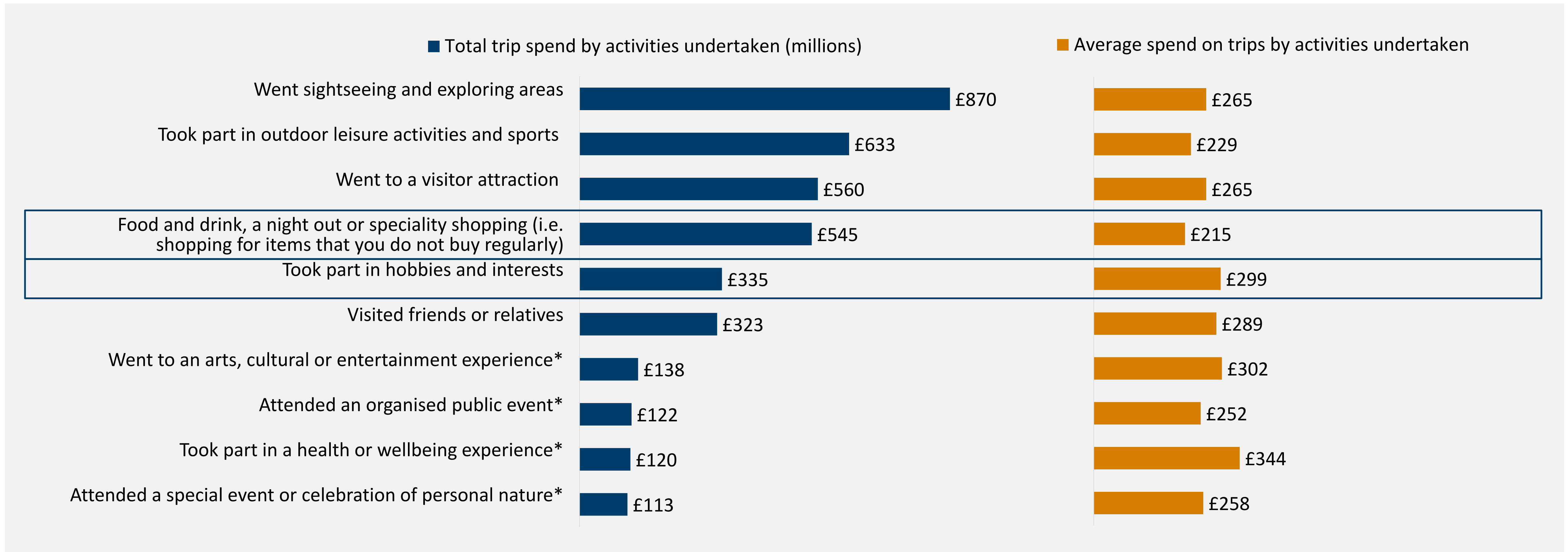
Base: Wales 993

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 2022

Excluding activities with low base sizes, trips that included taking part in hobbies and interests had the highest average (per trip) spend trips to Wales in 2022, these were also some of the few trips where spend increased since 2021. In contrast to day visits to Wales, overnight trips that included food, drink, nights out or speciality shopping had the lowest average spend in 2022.



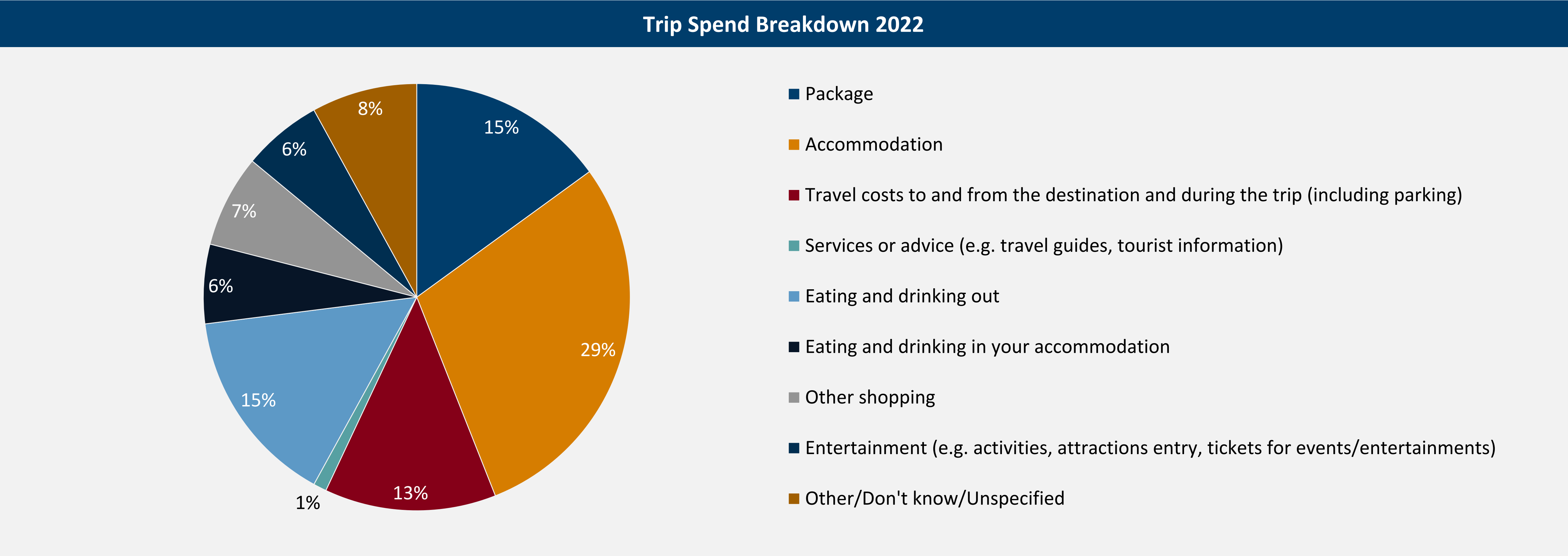
*Base size is between 30 and 100, it is recommended to only use the estimates as indicative.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trip spend breakdown 2022

While trip spend in Wales increased by 35% overall in 2022 (April to December) when compared to 2021 (April to December), there was minimal change in the proportion of spend on each category. The majority of trip spend still goes to accommodation, package holidays and eating and drinking out.

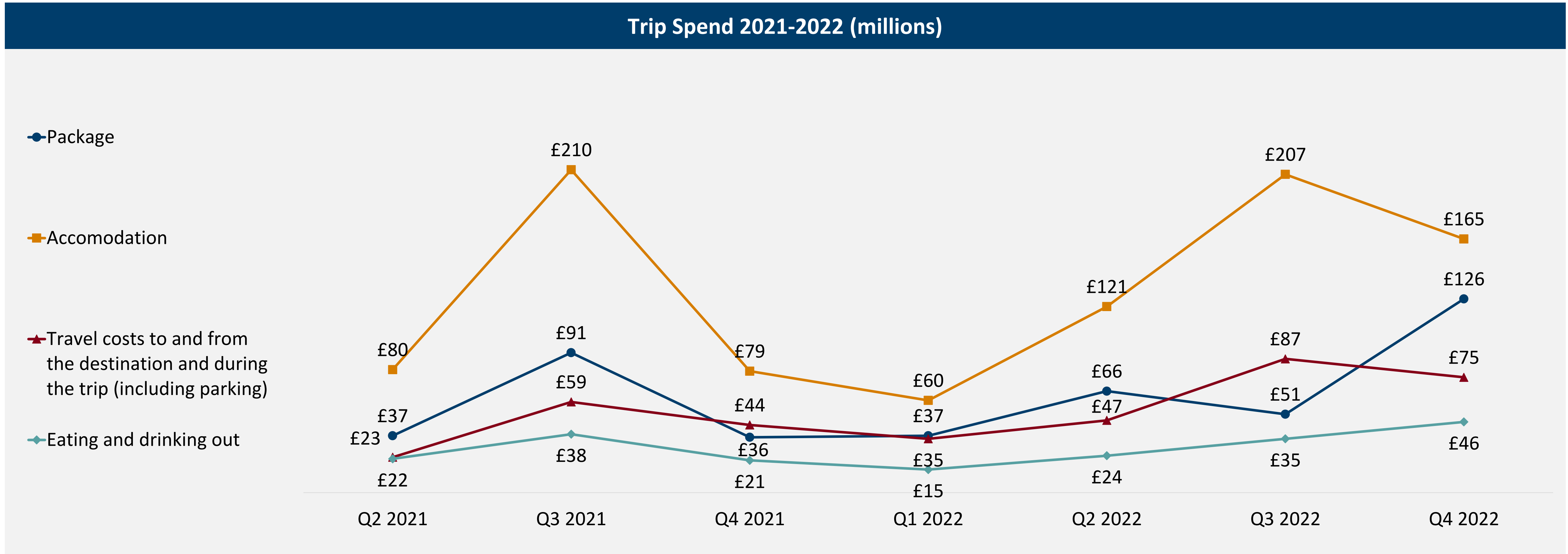


Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trip spend by quarter 2021-2022

Spend across all major categories increased in 2022 (April to December), when compared to 2021. Package (+48%), eating and drinking out (+43%), accommodation (+34%) and travel costs (+23%) may all have been impacted by inflation. For example, the annual consumer price index for hotels in 2022 was 11.4%, and 6.9% for transport. Spend on package holidays was highest in Q4 2022, representing 45% of spend on packages in 2022.



* Spend categories with an annual base size less than 100 have been excluded.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trips and spend by region of residence 2022

England residents take the vast majority of trips to Wales, stay longer than Wales residents and spend more. Focusing on Wales residents, South East Wales residents take the most trips, representing 13% of trips but just 9% of spend. While South West Wales residents represent a smaller proportion of trips, their average spend per trip is £210, versus £160 by South East Wales residents.

Total trips 2022	Trips (millions)	Nights (millions)	Spend (millions)
Net: England	6.22	19.68	£1,456
London*	1.15	3.56	£335
Rest of England (not London)	5.07	16.12	£1,121
Net: Scotland*	0.28	0.81	£83
Net: Wales	2.21	5.61	£380
Mid Wales*	0.14	0.36	£26
North Wales*	0.42	1.21	£62
South East Wales	1.09	2.64	£174
South West Wales	0.54	1.39	£113

Holiday Trips 2022	Trips (millions)	Nights (millions)	Spend (millions)
Net: England	2.72	10.38	£748
Rest of England (not London)	2.44	9.32	£642
Net: Wales	1.00	3.29	£233
North Wales*	0.20	0.67	£34
South East Wales*	0.45	1.42	£100
South West Wales*	0.27	0.96	£80

* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. Holiday trips to Mid Wales has a base size below 30 and thus has been excluded.

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trips and spend by region visited 2022

While South East Wales was the most popular destination in Wales, it also had the lowest average spend (£194 per trip) and the shortest average duration (2.4 nights per trip). North Wales represents 3 in 10 trips to Wales but had the highest average spend (£247 per trip) and the longest average duration (3.8 nights per trip). North Wales is preferred by the 55+ age group, who are bigger spenders in Wales. The only region with a significant uplift in trips in 2022 was South East Wales (+6pp).

Total trips 2022	Trips (millions)	Nights (millions)	Spend (millions)	Holiday Trips 2022	Trips (millions)	Nights (millions)	Spend (millions)
Mid Wales	1.14	3.02	£194	Mid Wales	0.55	1.72	£115
North Wales	2.43	9.23	£600	North Wales	1.49	6.15	£372
South East Wales	2.95	7.12	£573	South East Wales	0.83	2.36	£243
South West Wales	2.14	5.80	£479	South West Wales	0.90	3.37	£269

Source: Great Britain Domestic Overnight Tourism Survey 2022

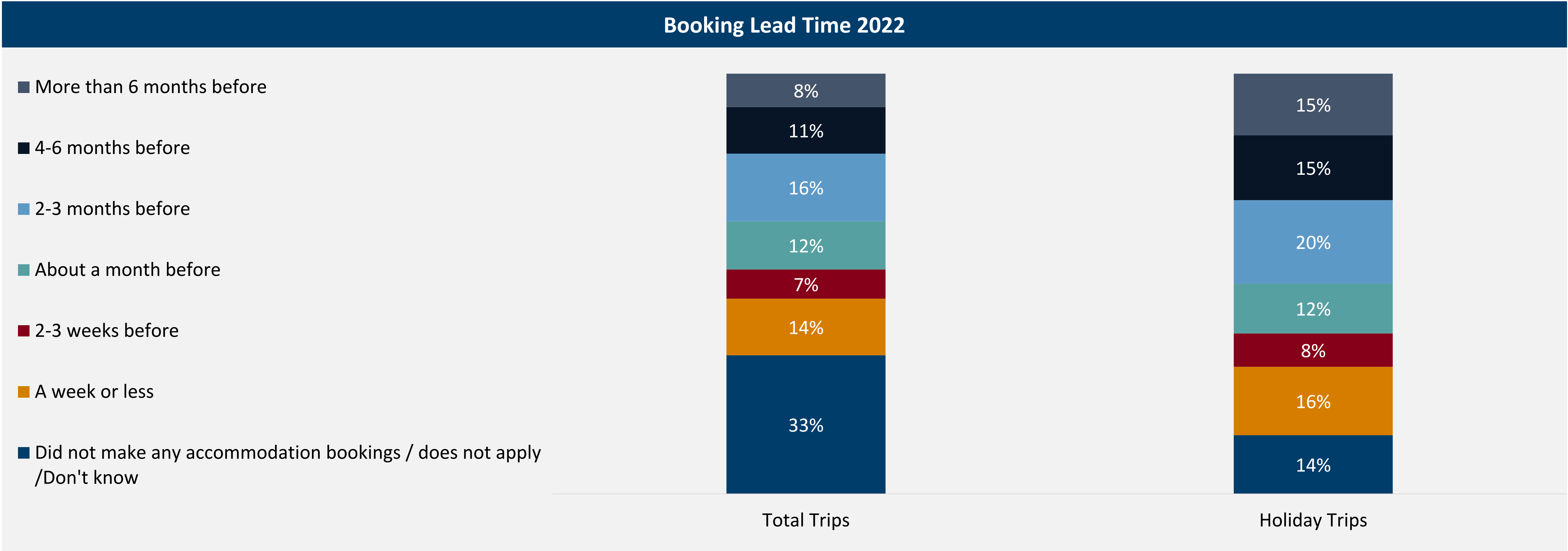
Base: Wales 993

Wales profile of trips 2022



Accommodation booking lead time 2022

Holiday trips to Wales in 2022 were booked well in advance, with at least half being booked two or more months before the trip. This represents a 13 percentage point increase on 2021. When looking at all trip types to Wales in 2022, advance booking of two months or more was most likely in Q4. This may be due to the uptick in package holidays in this period.

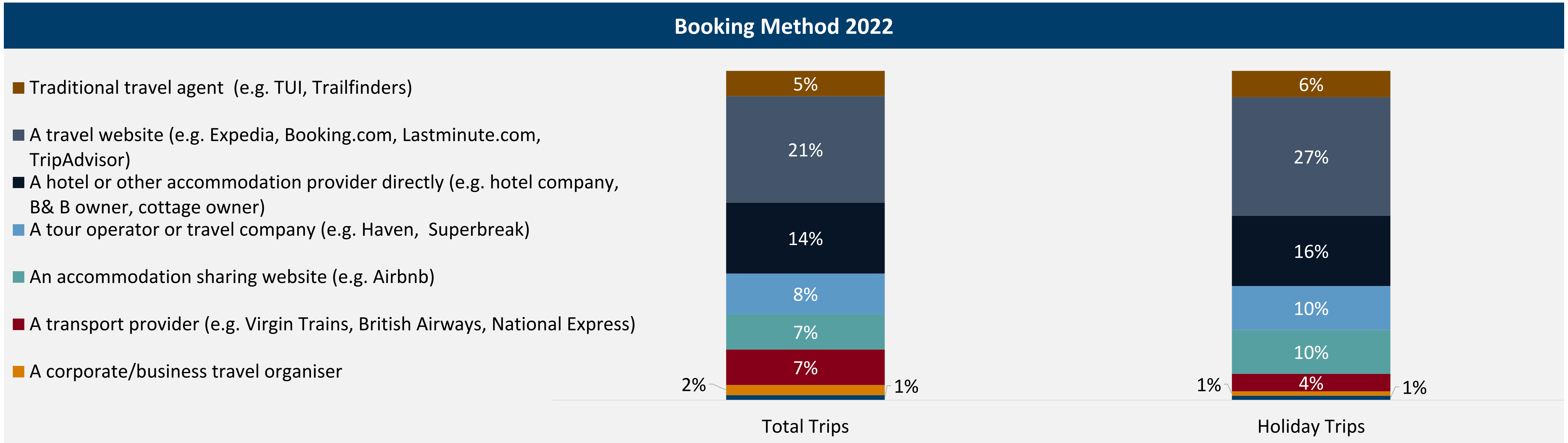


Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Booking method 2022

Travel websites, accommodation providers and tour operators were the most frequent means of booking a holiday to Wales in 2022. There was little change in booking methods between April to December 2021 and April to December 2022, which is in line with trends across Great Britain.



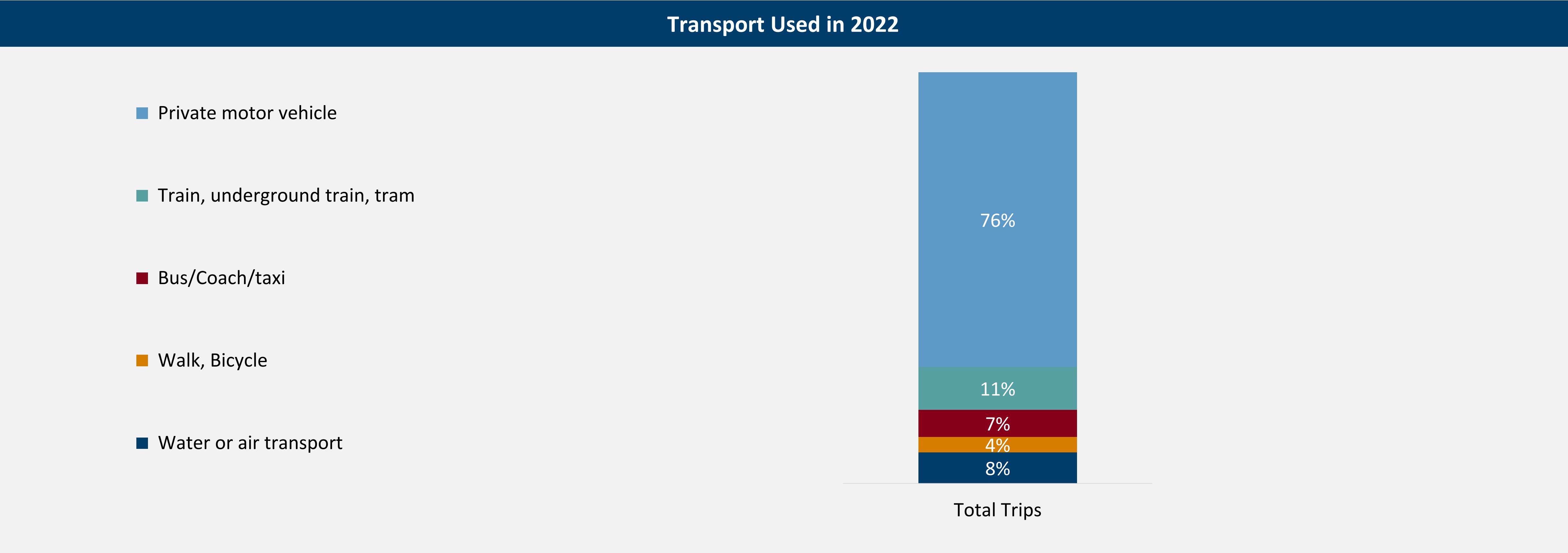
Didn't make a booking/ not applicable	32%	13%
Other/Don't know	11%	16%

Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Transport used 2022

Private motor vehicles were the main form of transport used on overnight trips to Wales, this was particularly the case for holiday trips. There were no significant changes in transport used between 2021 and 2022.

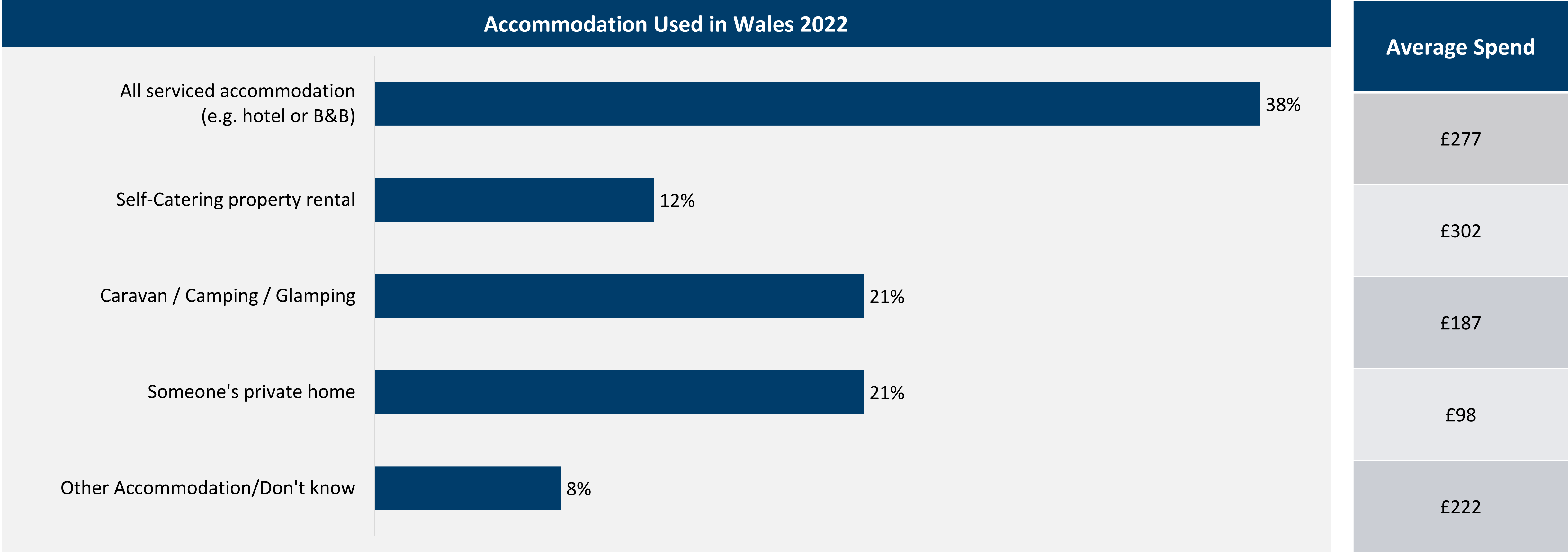


Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Accommodation used on overnight trips in 2022

Staying in a hotel was the most common type of accommodation used on overnight trips in Wales, followed by caravan/camping/glamping, which is much more popular in Wales than other nations. The type of accommodation used varies by trip purpose, and 4 in 10 holiday trips stayed in a caravan/camping/glamping in 2022. Accommodation choice is also determined by lifestage, with pre-nesters having a stronger preference for serviced accommodation (50%).

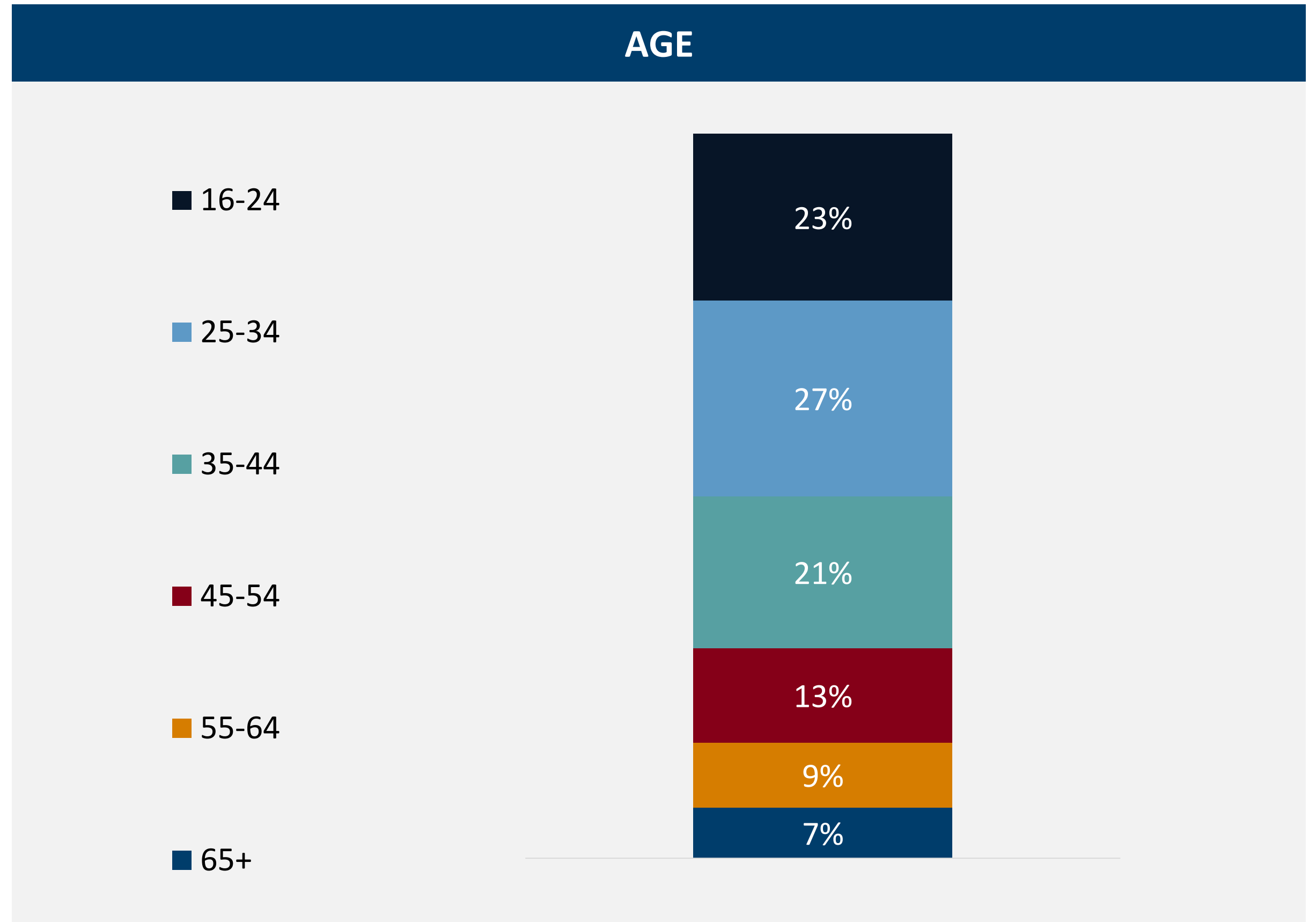
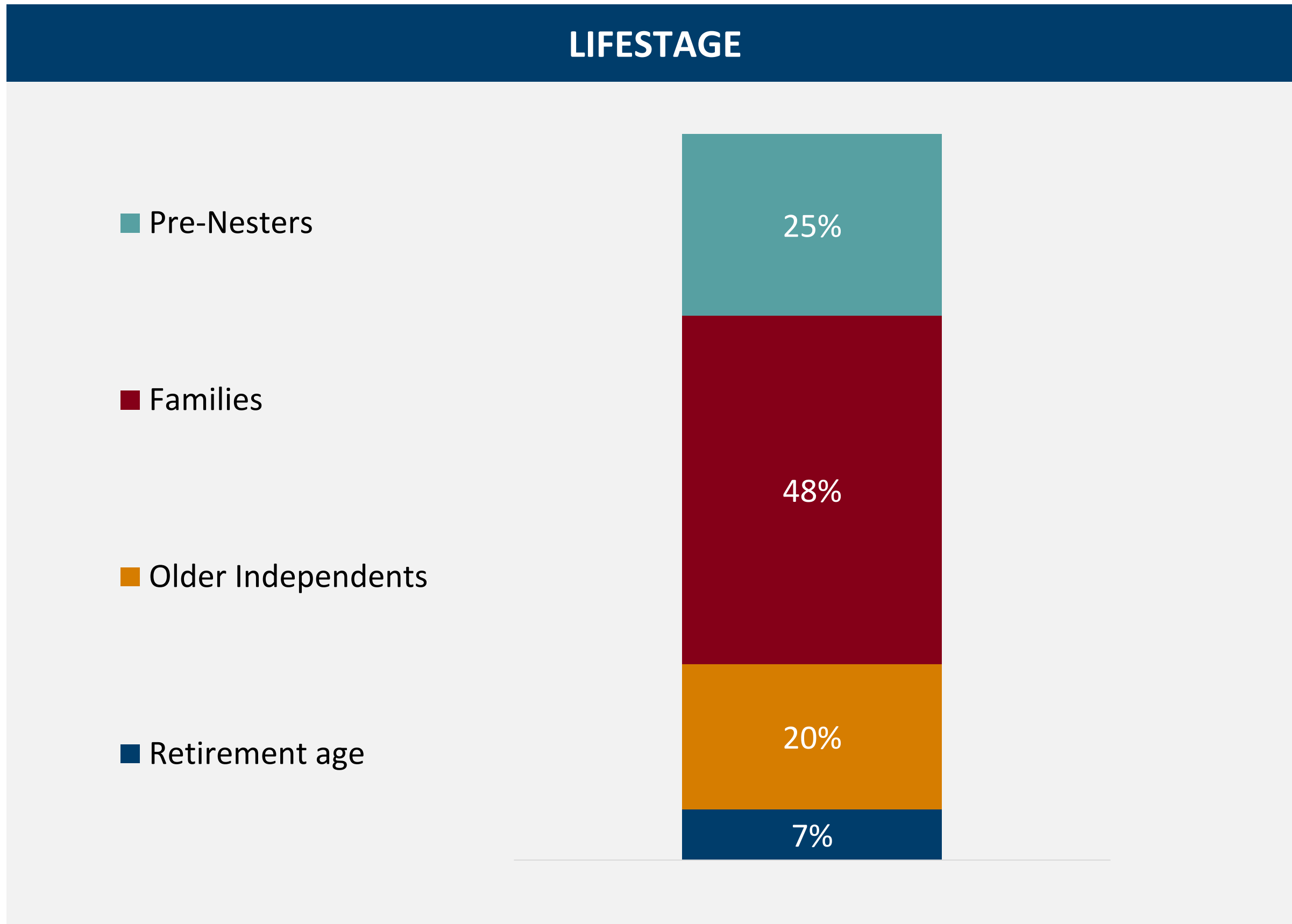


Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Lifestage and age profile for domestic trips 2022

Trips by those in the family lifestage make up the largest proportion of trips to Wales, however, these trips have the lowest average spend and shortest duration. Trips by older independents, on the other hand, have the highest average spend and duration (average of 3.5 days versus 3 overall). One in five trips are made up of 16-24 year olds, these trips tend to look significantly different to those of other groups, for example, a higher proportion took package holidays (34% versus 18% overall).

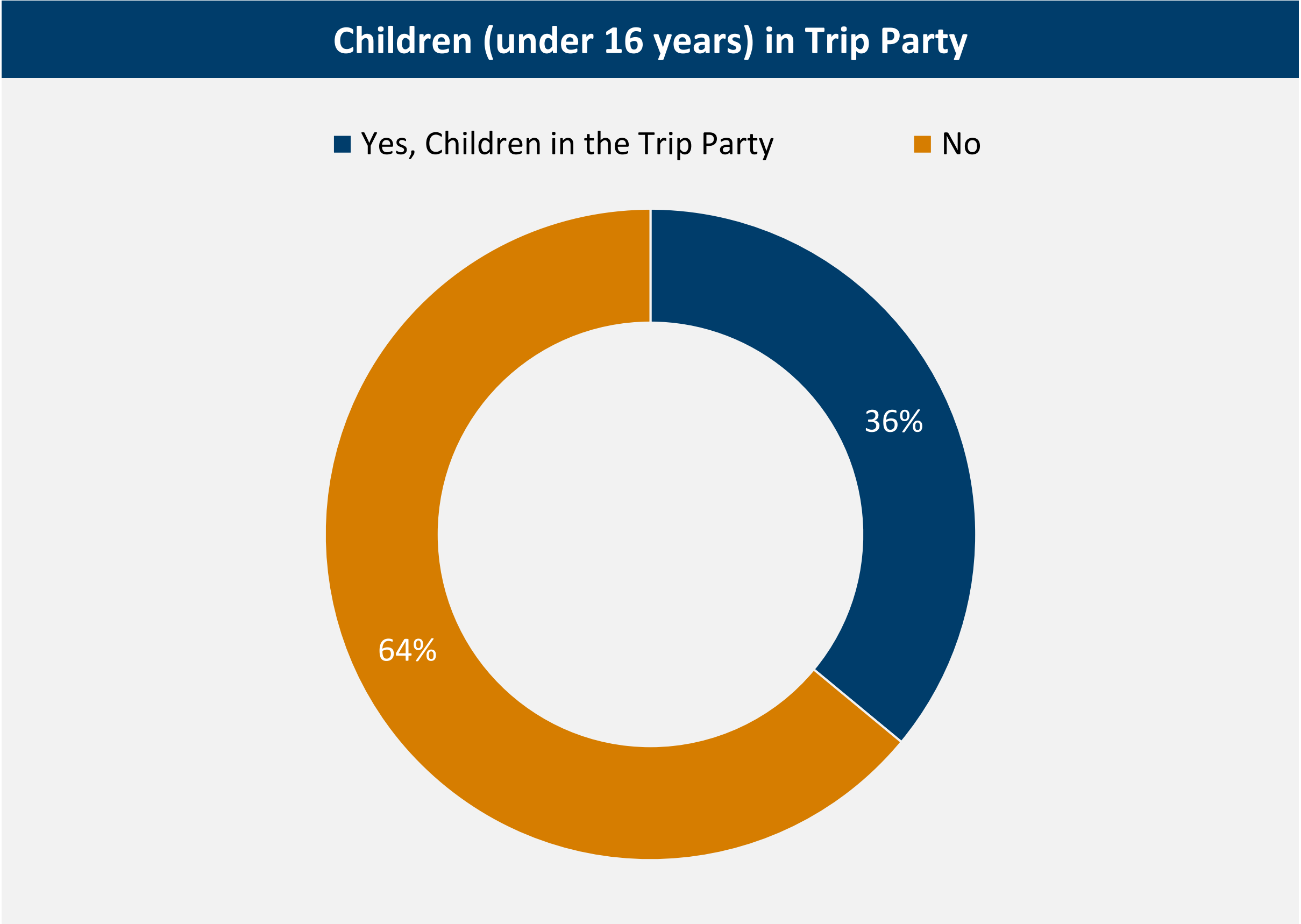
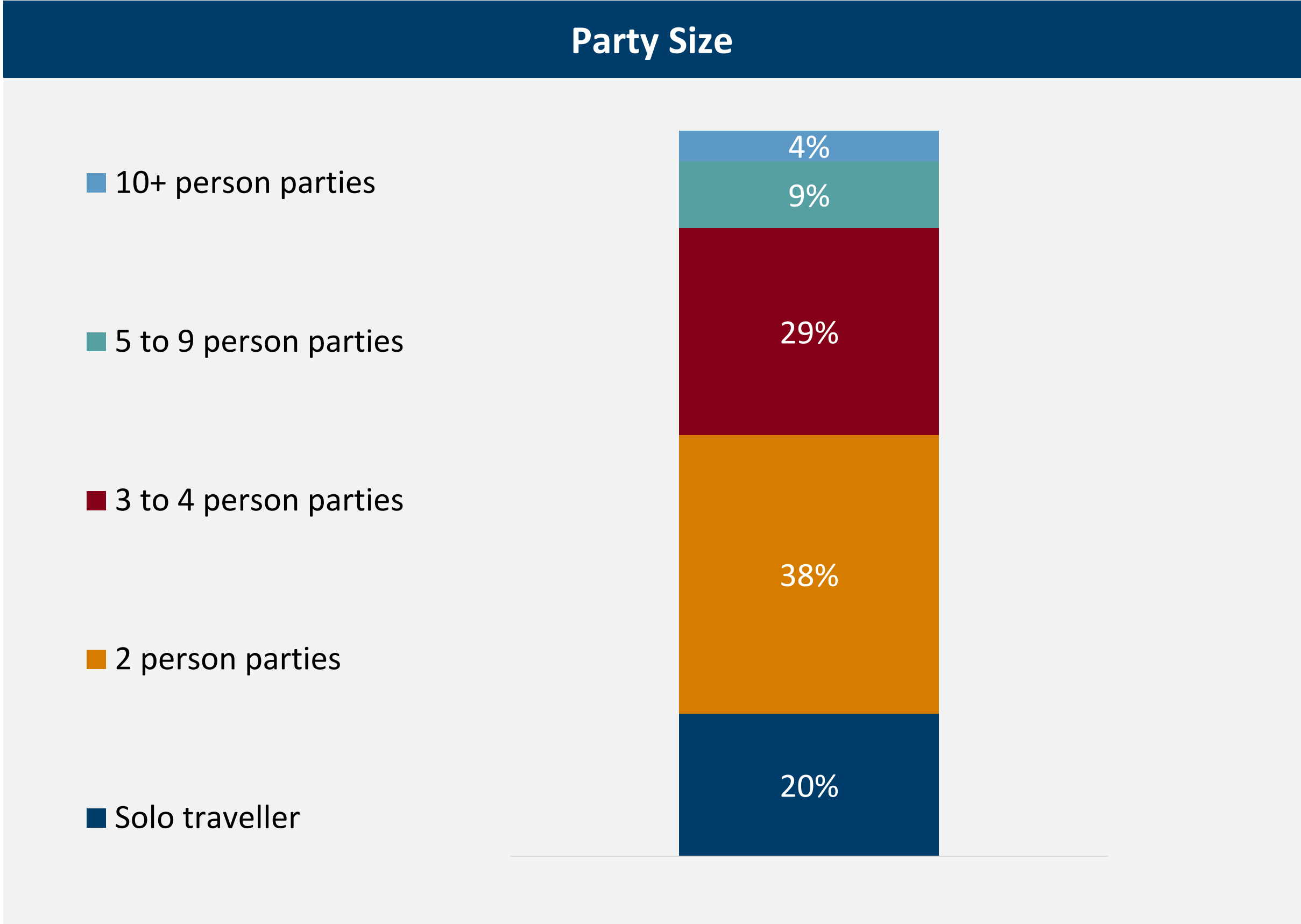


Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

Trip party size 2022

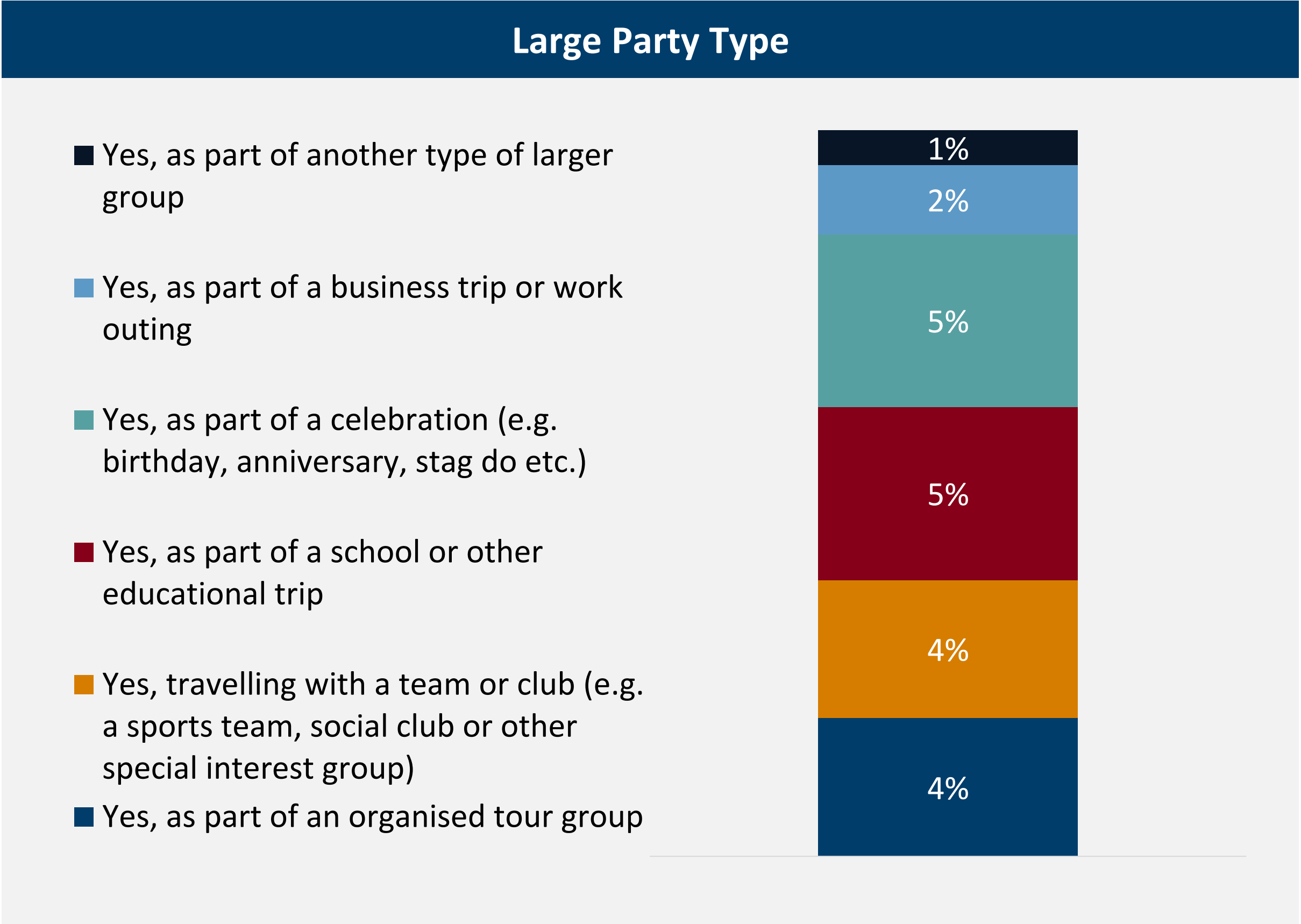
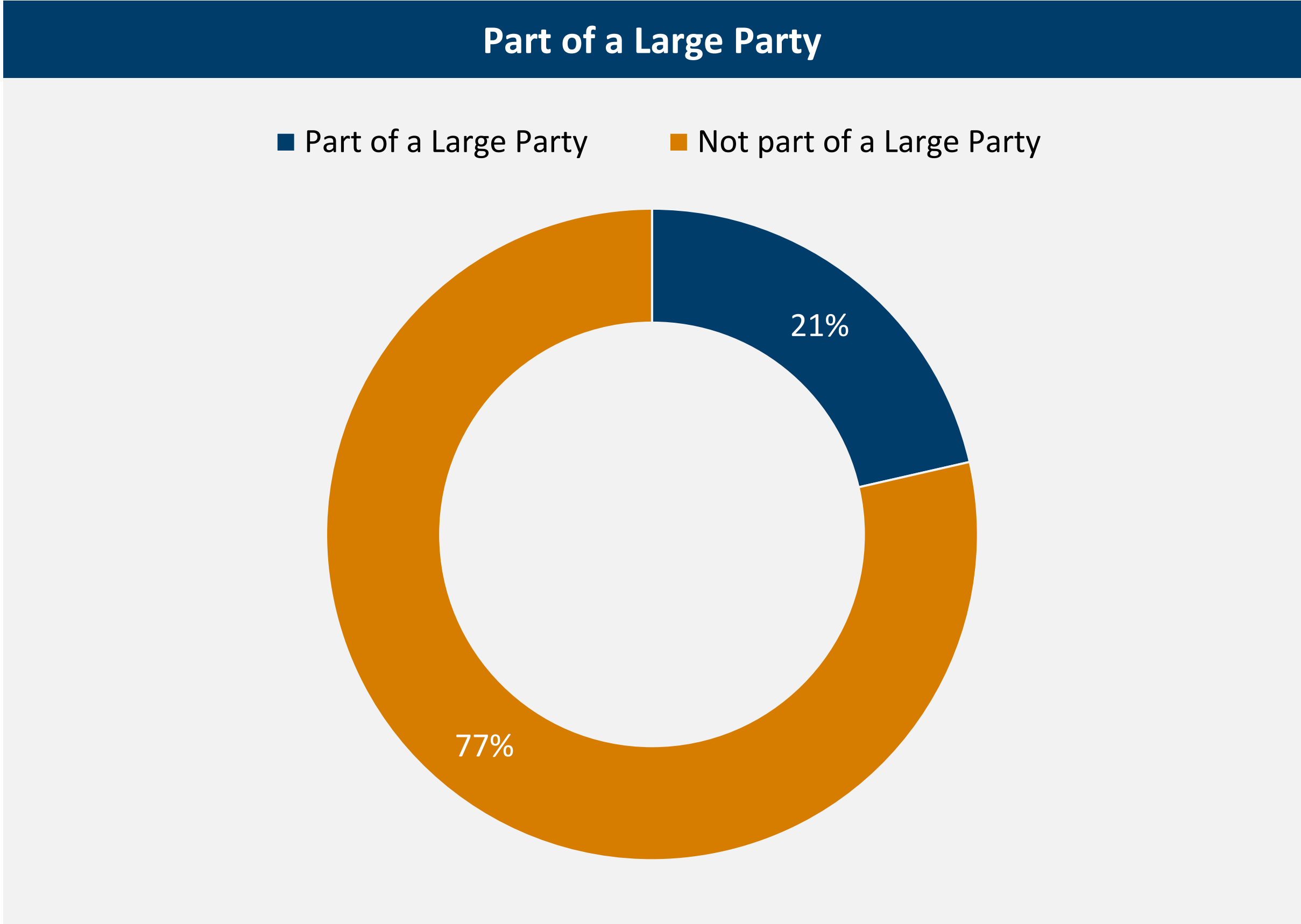
6 in 10 trip parties were made up of 2 people or less. 2022 saw a decrease in the average trip party size and a slight decrease in the proportion of larger parties of 5 people or more. When comparing April to December 2021 and April to December 2022, there was a 4 percentage point increase in the proportion of trips made by solo travelers. Pre-nesters are most likely to take solo trips (30% versus 22% overall).



Source: Great Britain Domestic Overnight Tourism Survey 2022
Base: Wales 993

Trip party composition 2022

1 in 5 trips to Wales were part of a larger group in 2022, with celebrations being the most popular large group type. Trips with larger groups had a slightly lower average spend and were shorter in duration than those not part of a larger group



Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Wales 993

Visits by home region and region of visit 2022

North and South East Wales are equally popular among England residents, however, this varies by region. London residents preferred the South East, versus the rest of England who made more trips to North Wales. Wales residents took more trips within their own region, except for Mid Wales residents who preferred the South West.

		HOME REGION														
		Net England	East Midlands	London	North West England	South East England	South West England	Yorkshire & the Humber	West Midlands	Rest of England (Not London)	Net Scotland	Net Wales	Mid Wales	North Wales	South East Wales	South West Wales
REGION VISITED	Base size home region	451	34	67	95	46	49	32	105	384	43	499	33	93	249	120
	Mid Wales	13%	9%	12%	6%	30%	4%	18%	19%	14%	11%	12%	20%	7%	10%	19%
	North Wales	32%	28%	16%	66%	17%	11%	23%	35%	36%	27%	17%	14%	69%	4%	2%
	South East Wales	32%	31%	50%	12%	35%	61%	37%	22%	28%	37%	38%	22%	21%	48%	34%
	South West Wales	22%	43%	22%	14%	22%	27%	16%	23%	22%	21%	33%	46%	3%	37%	45%

*Note that the above table is based on trips to Wales, therefore the percentages exclude trips to England and Scotland. 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.

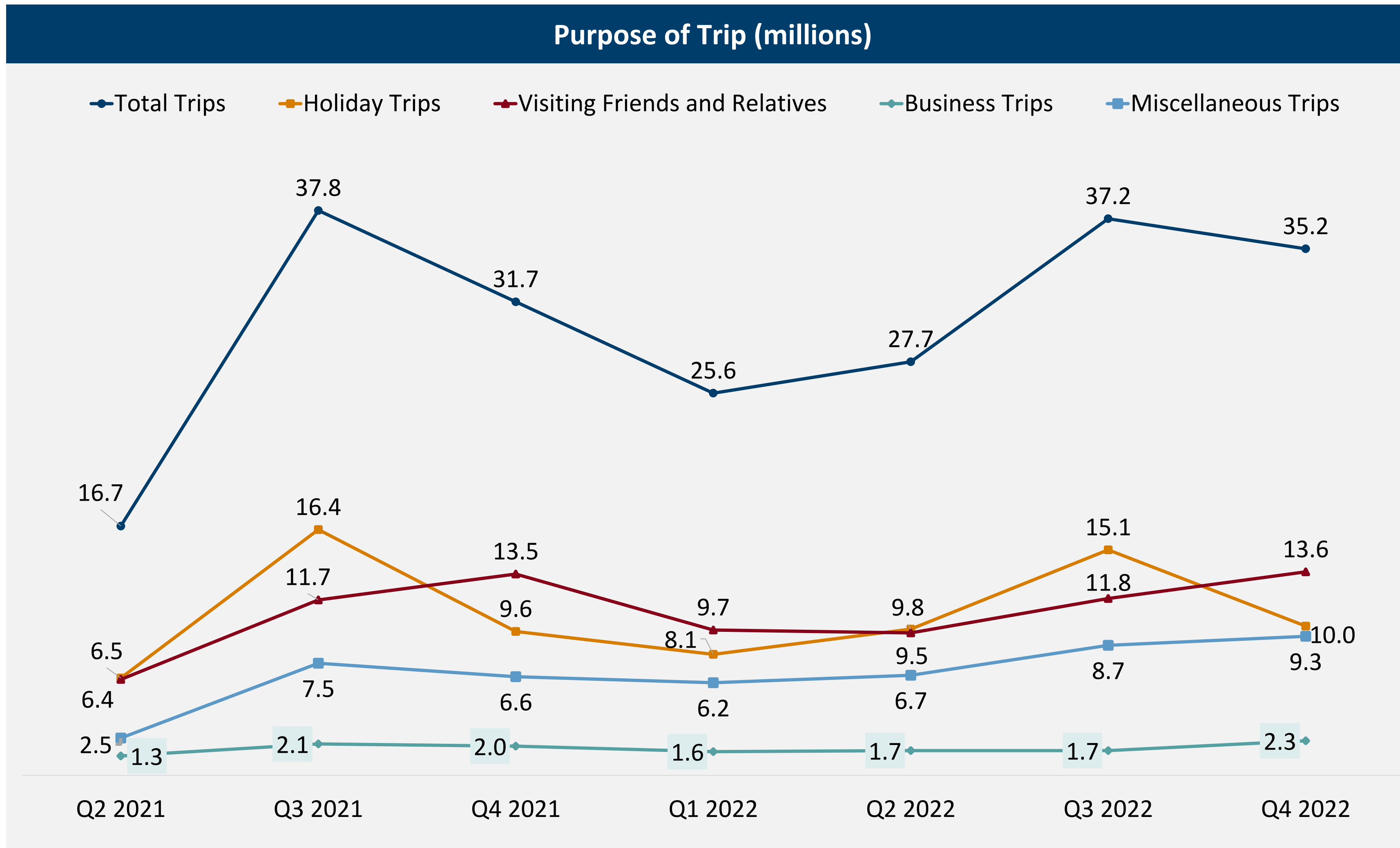
Source: Great Britain Domestic Overnight Tourism Survey 2022

Base: Wales 993

APPENDIX



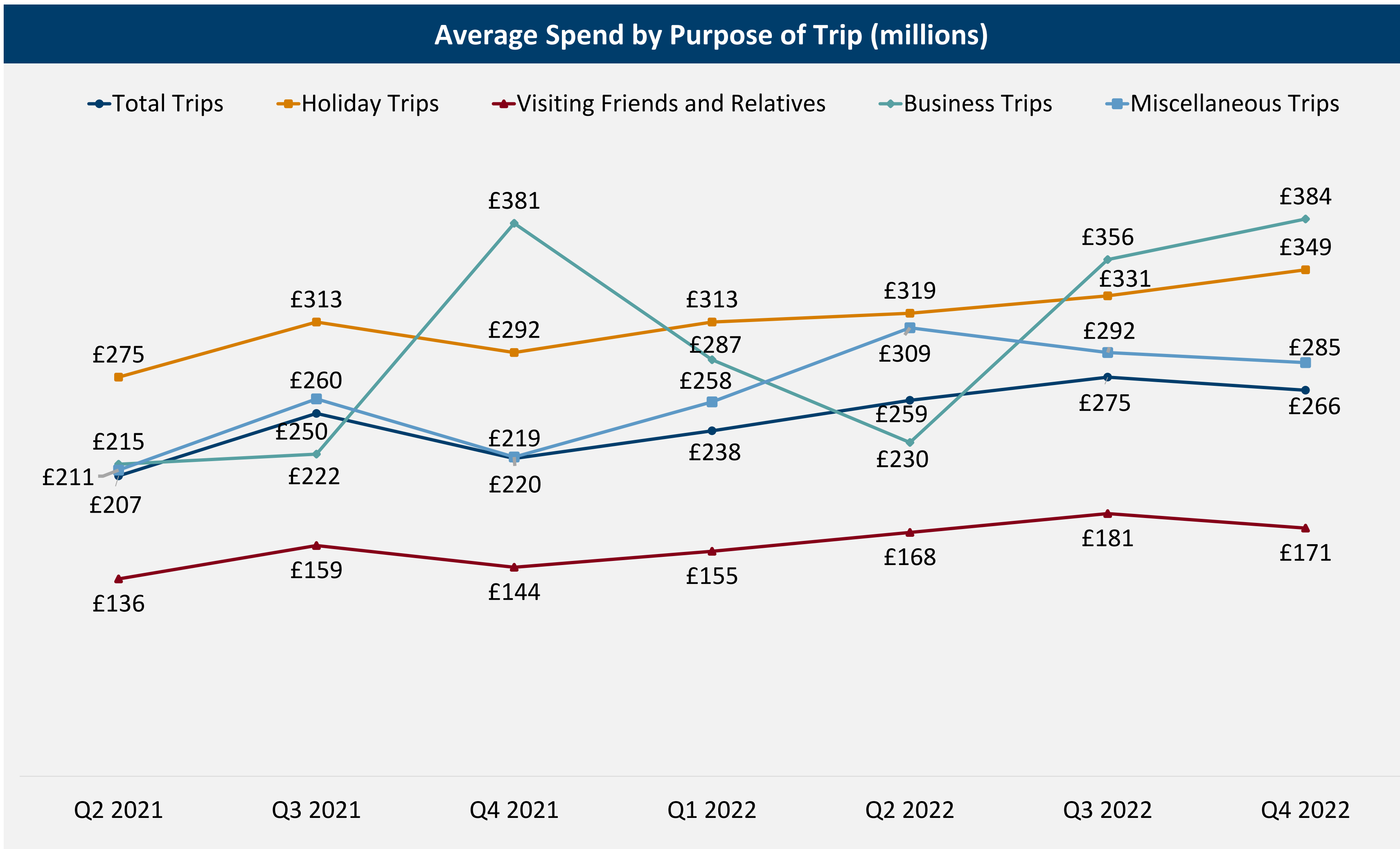
Trip purpose by quarter in Great Britain



Purpose 2022	Number of Trips 2022	Proportion of Trips
Total Trips	125.7	
Holiday Trips	43.0	34%
Visiting Friends and Relatives	44.7	36%
Business Trips	7.2	6%
Miscellaneous Trips	30.8	25%

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

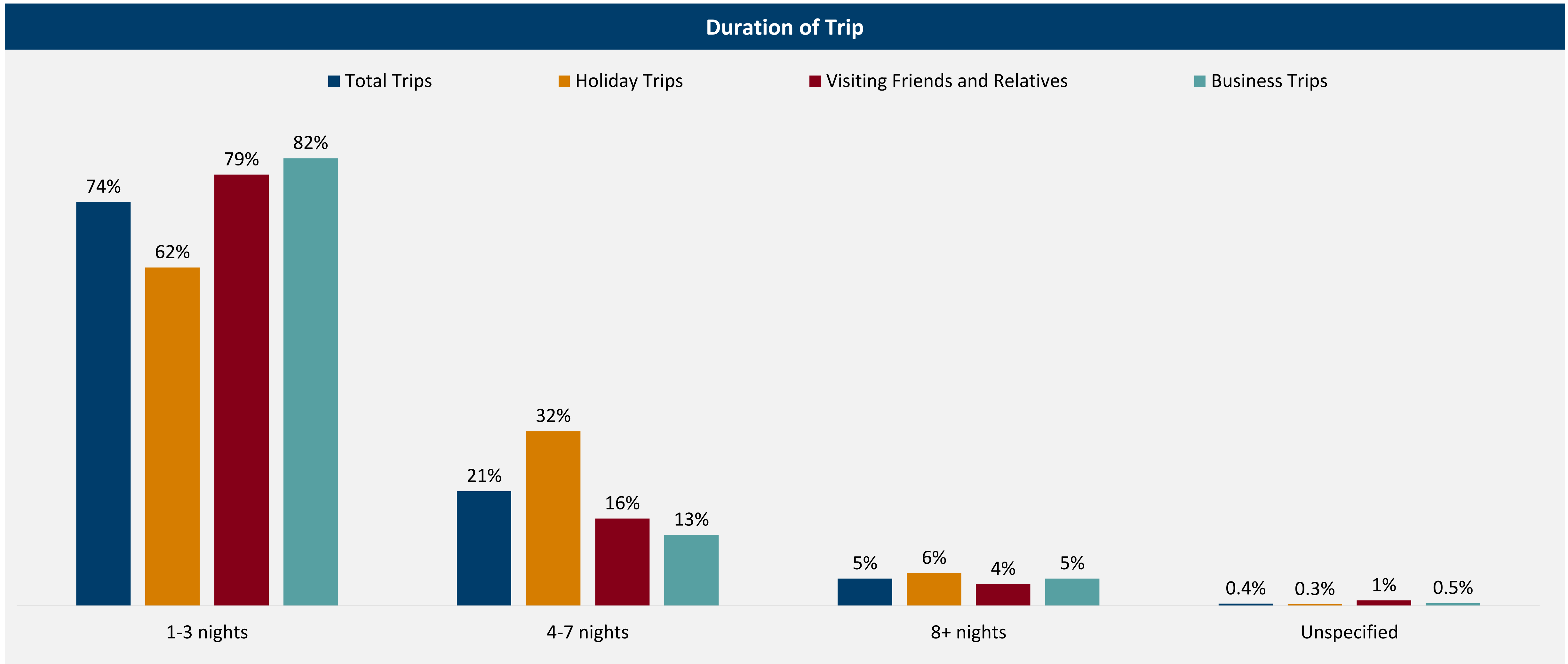
Average spend by trip purpose in Great Britain



Purpose of Trip	Average Spend GB 2021 (April to December)	Average Spend GB 2022 (April to December)
Total Trips	£230	£268
Holiday Trips	£299	£333
Visiting Friends and Relatives	£148	£174
Business Trips	£278	£331
Miscellaneous Trips	£237	£294

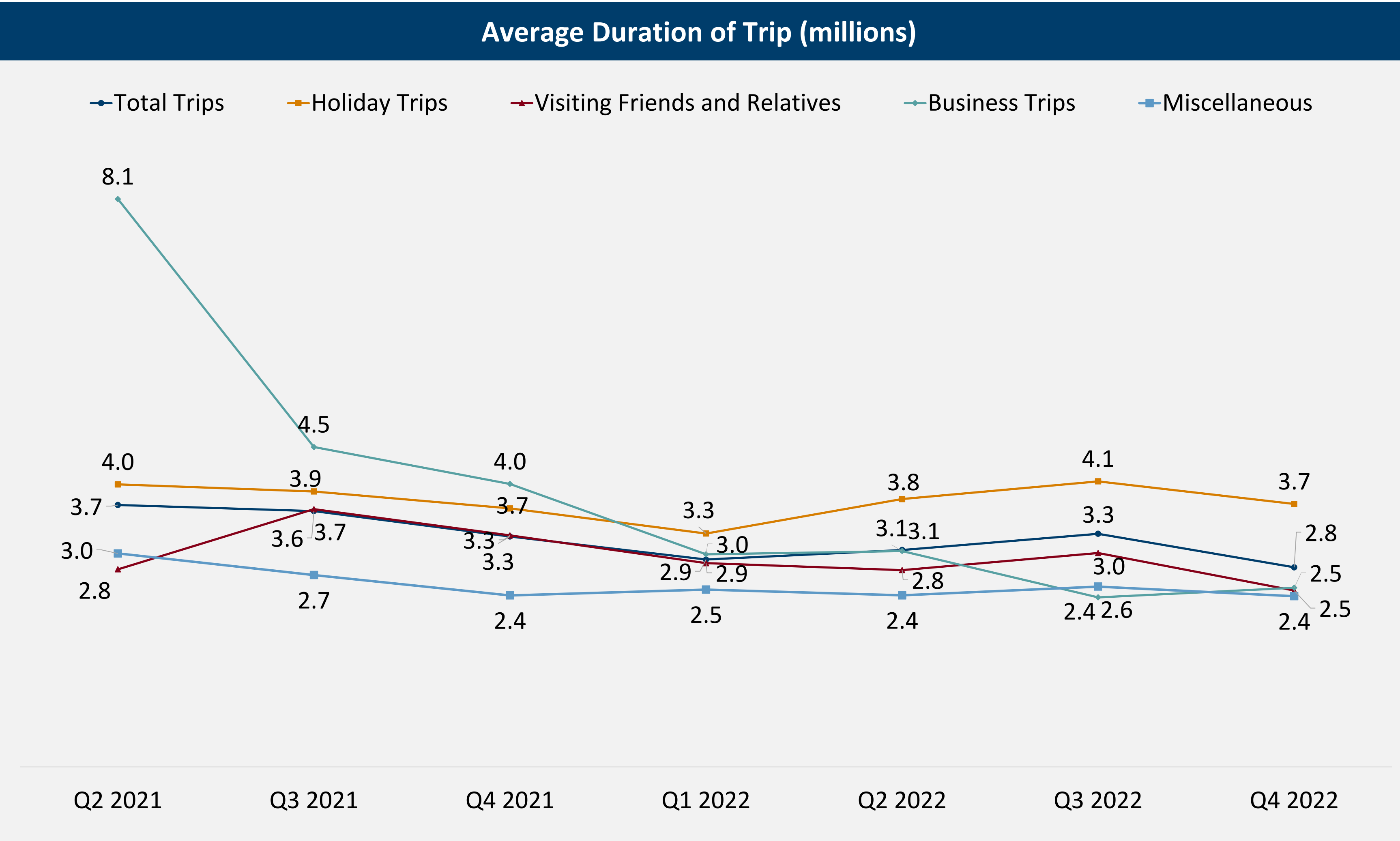
Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Duration of trips in Great Britain 2022



Source: Great Britain Domestic Overnight Tourism Survey 2022
Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993

Average duration of trip by quarter in Great Britain



Purpose 2022	Average Duration 2021	Average Duration 2022
Total Trips	3.5	3.1
Holiday Trips	3.9	3.9
Visiting Friends and Relatives	3.3	2.8
Business Trips	5.2	2.7
Miscellaneous Trips	2.7	2.5

Source: Great Britain Domestic Overnight Tourism Survey 2022
 Base: Great Britain 10,161; England 7,885; Scotland 1,537; Wales 993