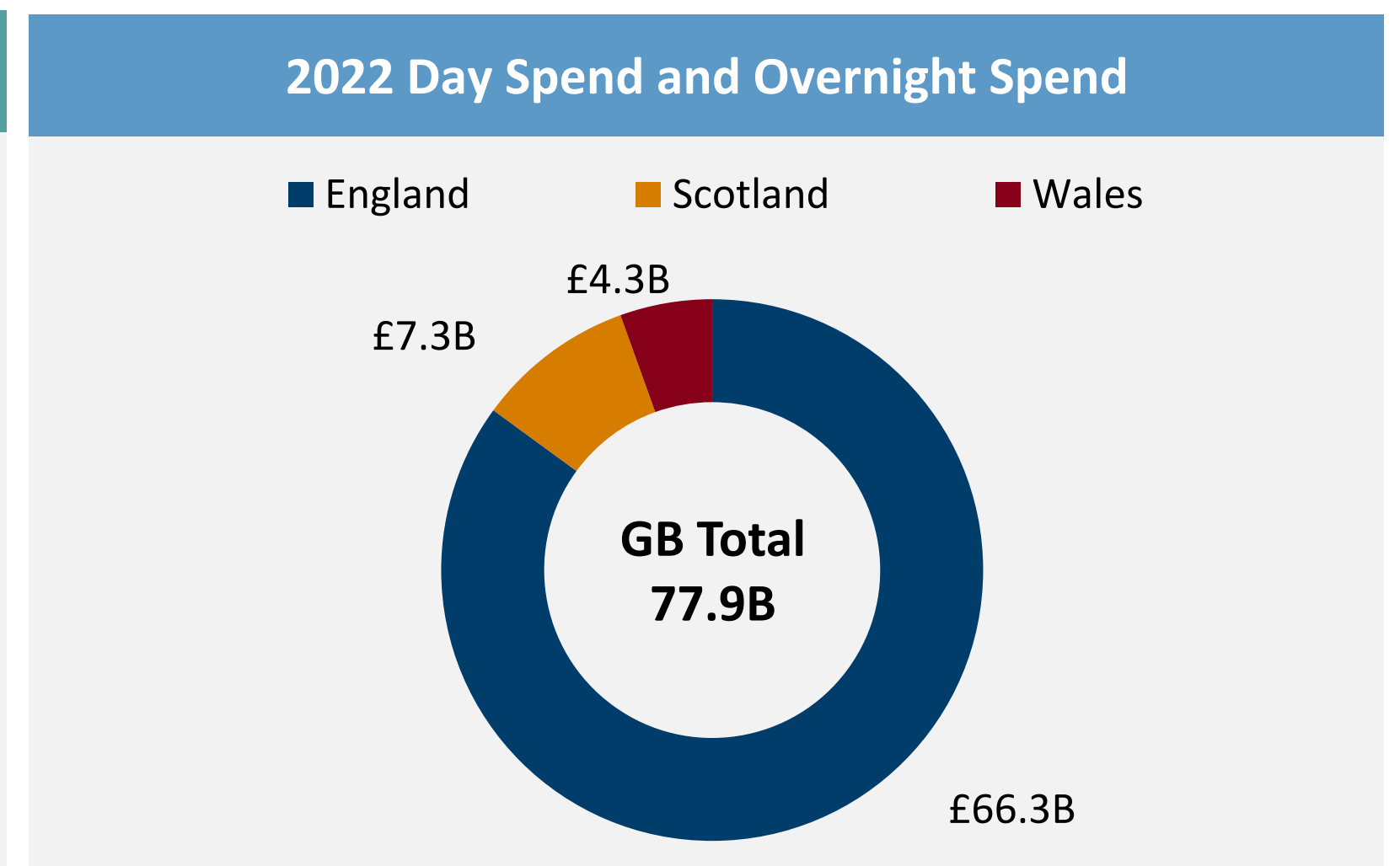
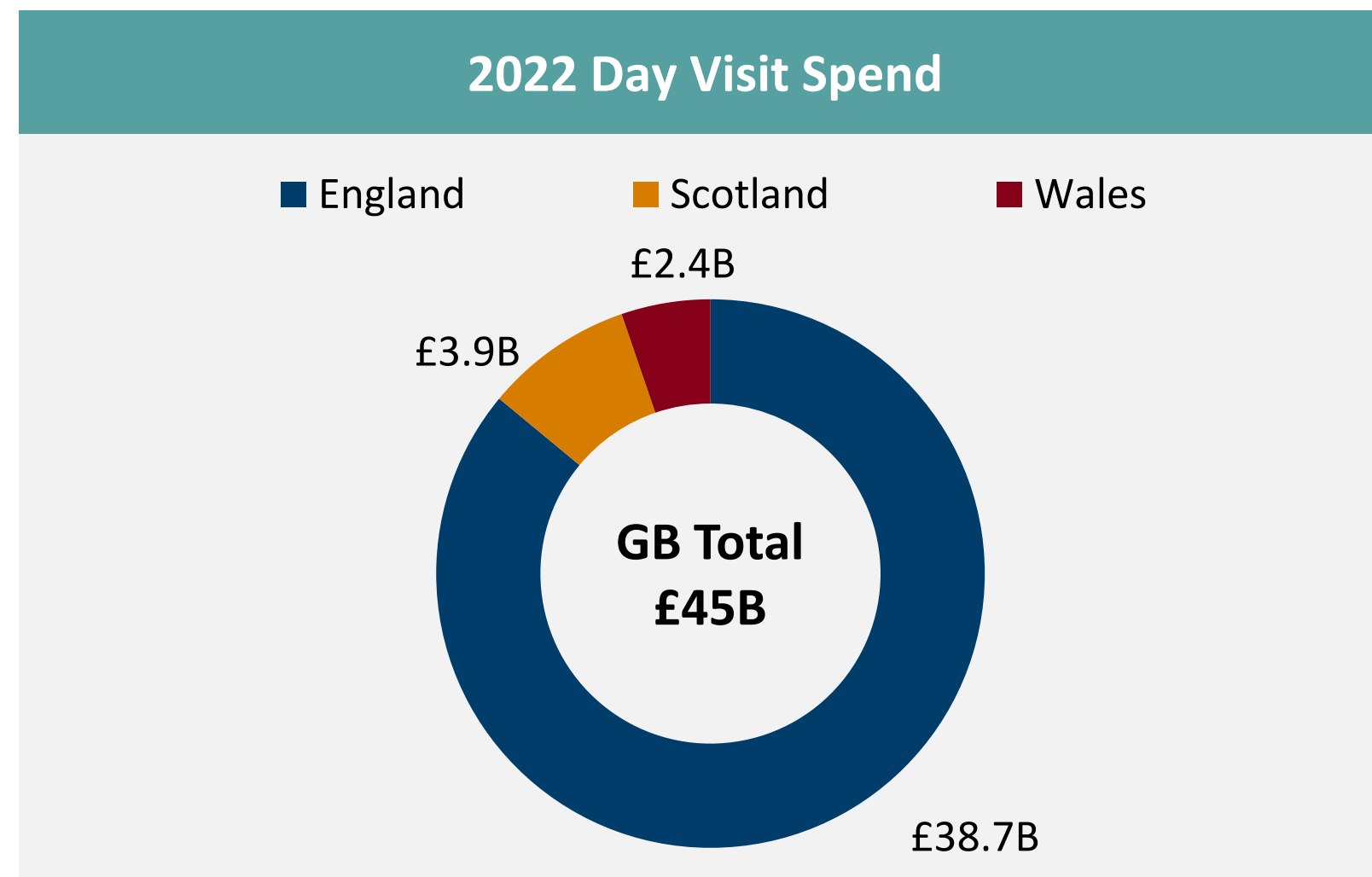
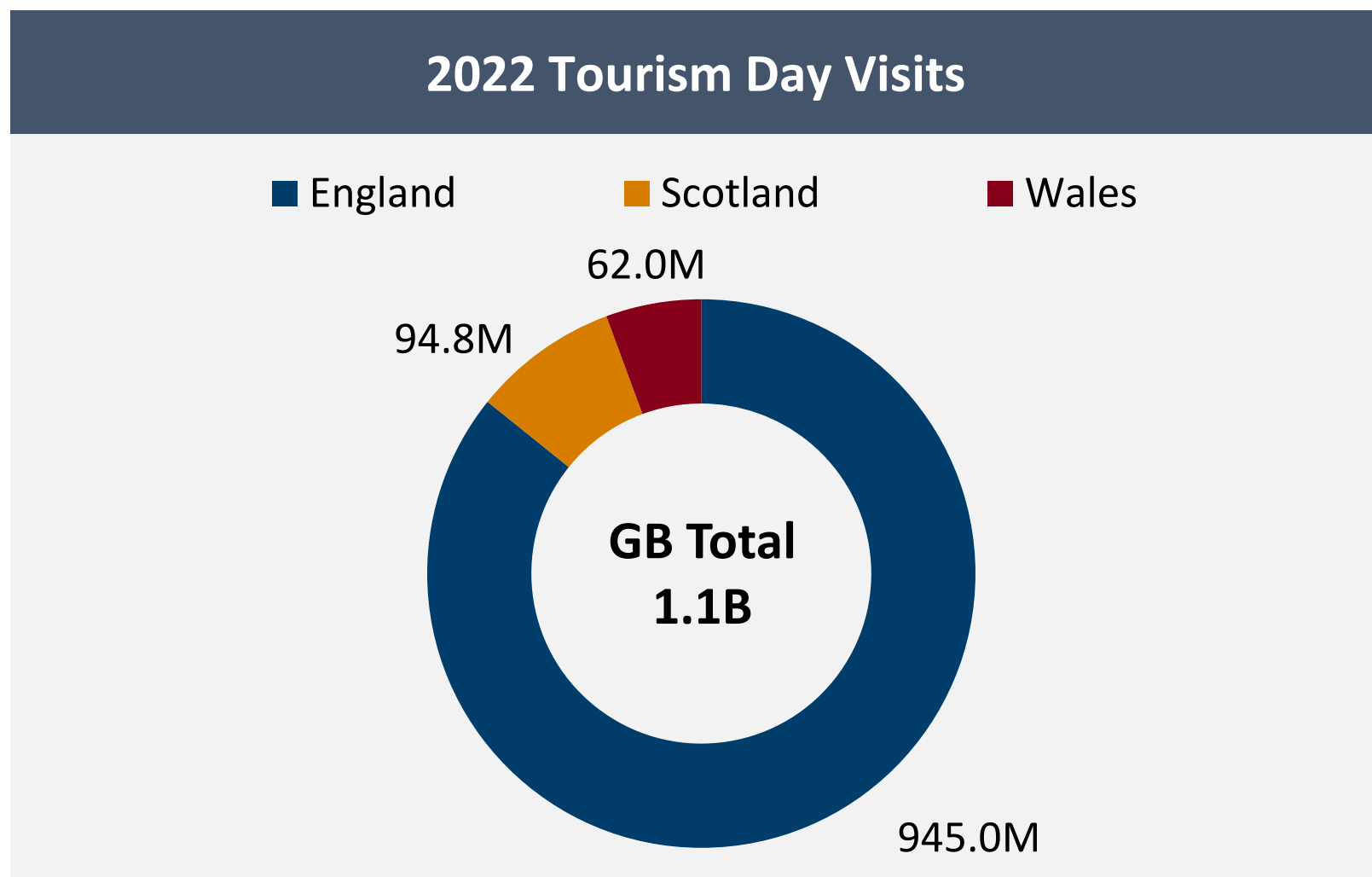
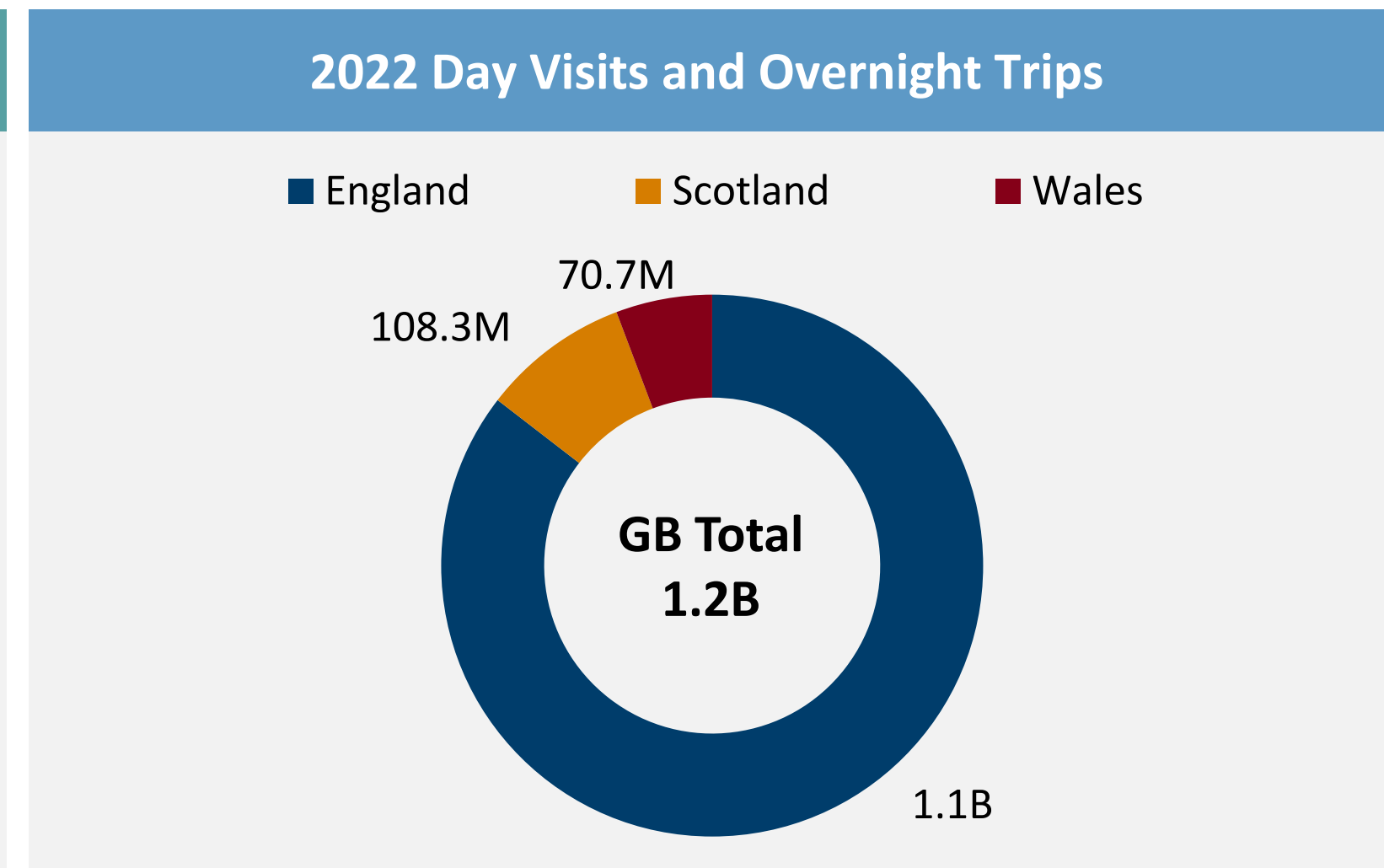
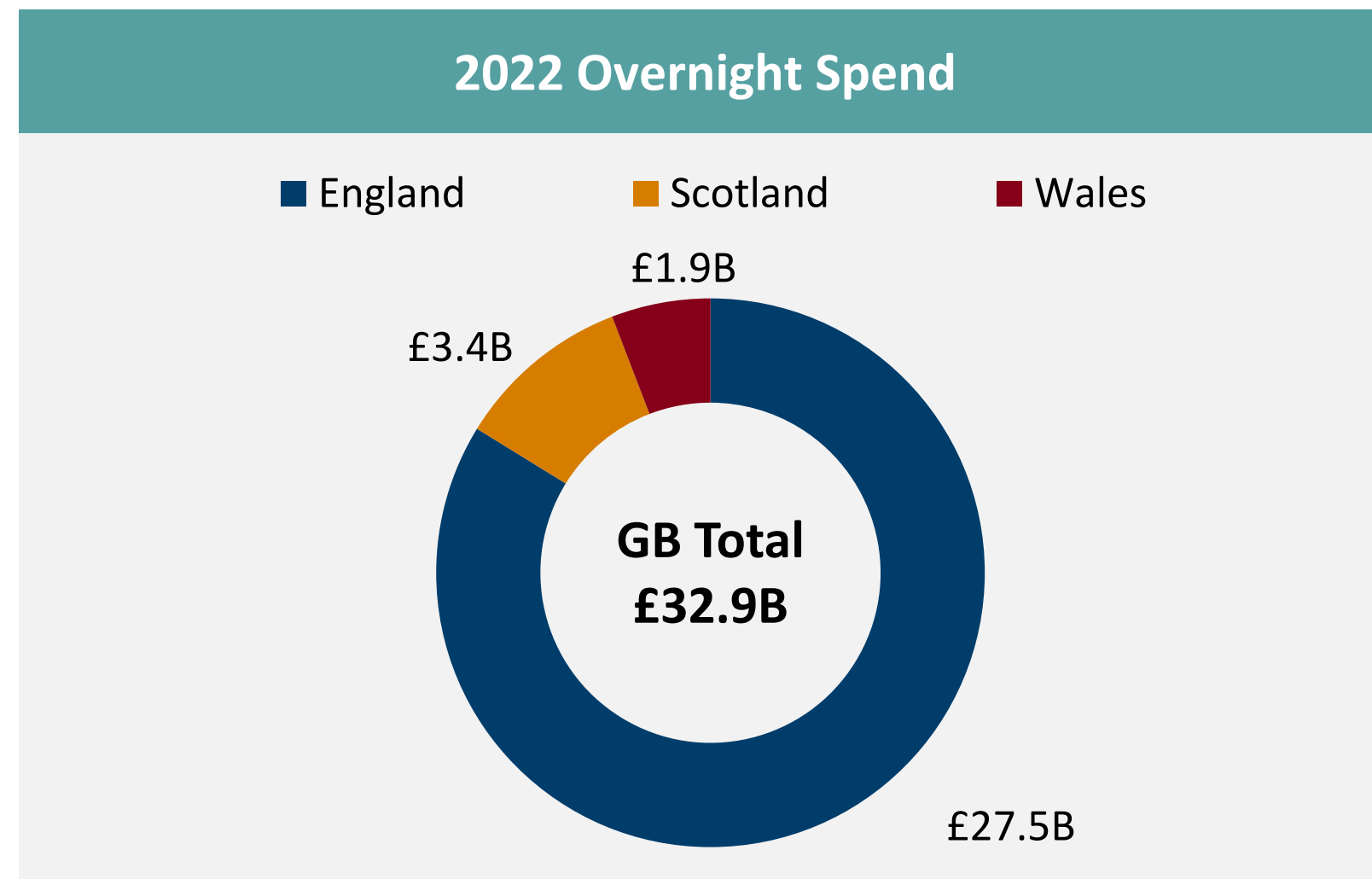
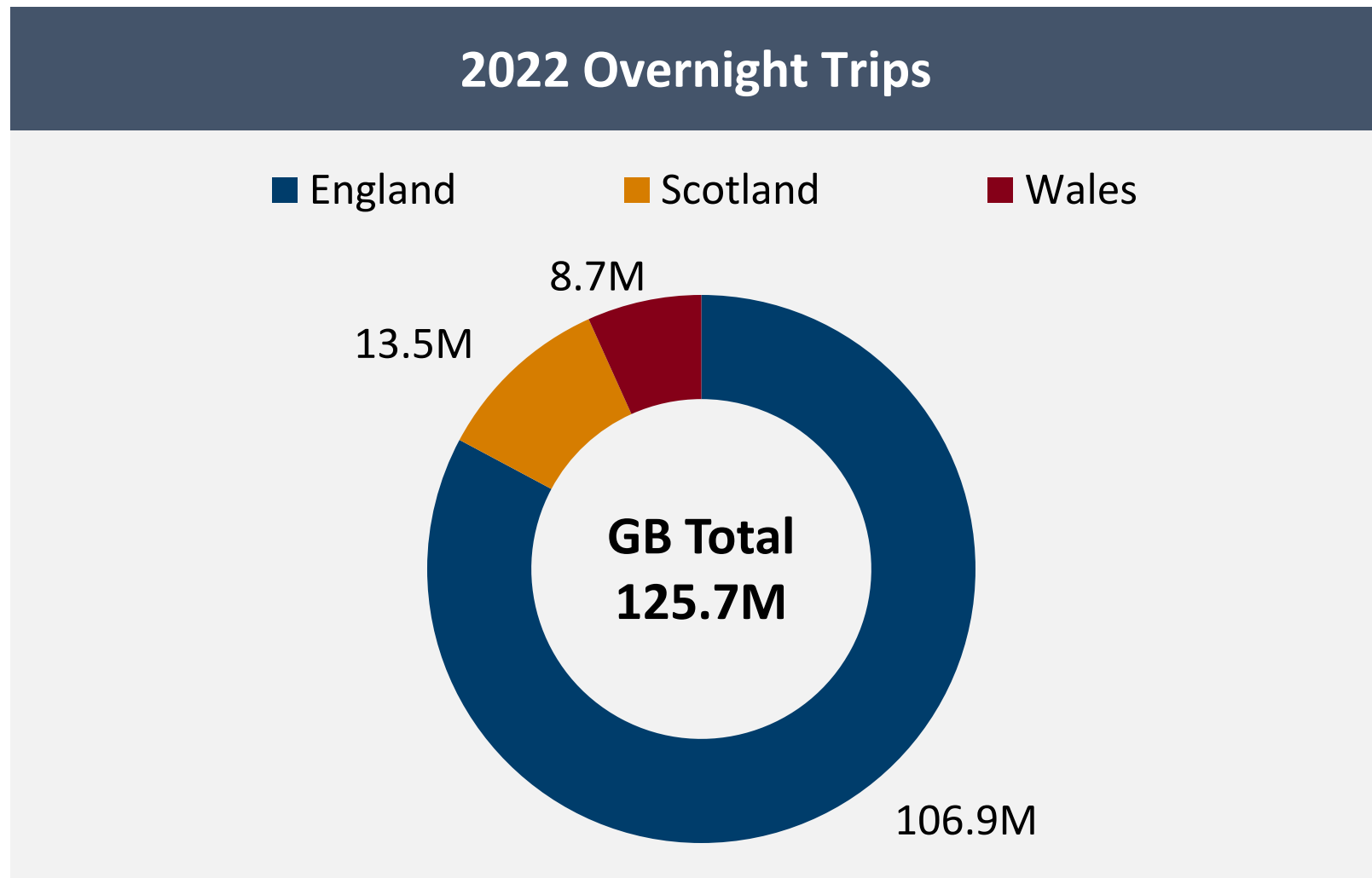


Domestic GB Tourism Statistics: Wales Tourism Day Visits Annual Report 2022



Great Britain residents took 1.2 billion day and overnight trips to Great Britain in 2022. Spend for all domestic trips to Great Britain in 2022 was £77.9 billion.



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

Introduction

- The Great Britain Day Visits Survey (GBDVS) is a national consumer survey. It measures the volume and value of domestic tourism day visits by residents of Great Britain. This report focuses on the domestic tourism day visit statistics for 2022 for Wales. Throughout the report the tourism day visit statistics for 2021 are used to highlight trends in visits and spend. Please note the 2021 data (April to December) is revised data. Detailed results for 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 for further detail on the [Visit Wales](#) website. This includes guidance on non-comparability with data up until 2019.
- This report includes data for three definitions of leisure day visits: Tourism Day Visits (the standard definition, which this report focuses on); 3+ hour Leisure Day Visits (the broadest measure); Tourism Day Visits – Activities Core to Tourism (the narrowest measure).
- This report provides information about visit characteristics, with comparisons where appropriate. Quarterly reports and detailed data on tourism day visits 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 day visits were not permitted. The results are comparable across nations (England, Scotland and Wales).
- The survey is jointly sponsored by VisitEngland, VisitScotland and Visit Wales. The survey is currently undertaken by independent research agency, BMG. Together with the Great Britain Overnight Tourism Survey (GBTS), which is available as a separate report, these surveys are the largest and most comprehensive surveys of GB domestic travel.

Methodology (1/2)

- The annual sample size for GBDVS is 35,000 respondents. These numbers include respondents who have not taken any qualifying visits. The annual samples are split evenly across the 52 weeks of the year.
- Since 2020, GBDVS has merged with GBTS, using an online blended panel approach, which is a significant change from the pre-2020 face-to-face methodology. Respondents are sourced via an online platform that combines a number of ESOMAR accredited panel providers.
- Data is collected about the number of domestic day visits taken by adults aged 16+ in England, Scotland and Wales. The survey also collects details of any children involved with day visits, and these are included in the estimated grossed-up figures for visit and spend.
- A number of changes were made to the questionnaire in 2022, the pre-2022 data has been calibrated to account for these changes.
- Data was collected for 9 months in 2021 (April to December) versus 12 months in 2022 (January to December). This is due to the COVID-19 pandemic where travel was restricted. While the annual 2021 and 2022 data isn't directly comparable due to the different travel time periods, commentary on relevant differences between April to December 2021 and April to December 2022 is provided throughout this report.
- The GBDVS 2021 and 2022 data has been published as statistics in development. More information on this can be found on the [Office for Statistics Regulation](#) website.
- The monthly estimates are subject to limitations on sample size and seasonal fluctuations in visits taken across the year.

Methodology (2/2)

- Interlocking quotas have been used where feasible. Within each country, quotas are set by age and gender (interlocking), approximated social grade and 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

- 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

There are 3 main measures for day visits in this report – 3hr+ Leisure Day Visits (the widest measure), Tourism Day Visits (the standard measure) and Tourism Day Visits – Activities Core to Tourism (the narrowest measure). Tourism Day Visits are a subset of the broader leisure day visits. To qualify as an eligible Great Britain Day Visit the following criteria must be met:

3hr+ Leisure Day Visits	Tourism Day Visits – The main focus of this report	Tourism Day Visits – Activities Core to Tourism
<ul style="list-style-type: none"> — Lasted 3 hours or more (including travel time) — Undertake 1 or more eligible leisure activities — Must not have been overnight 	<p>In addition to the 3hr+ leisure day visit criteria, a Tourism Day Visit:</p> <ul style="list-style-type: none"> — Is undertaken less often than once a week — Includes a visit to a place outside of the local authority where the visit started, with the exception of visits where the main activity is a visitor attraction, attending a public event or to watch live sport. In these cases the need to have visited outside of the starting local authority is removed. 	<p>In addition to the tourism day visit criteria, a visit must have included one of the following as the main activity undertaken during the visit:</p> <ul style="list-style-type: none"> — Went to a visitor attraction e.g., a historic house, theme park, museum, etc. — Went sightseeing and exploring areas. — Spa / beauty / health treatments — Retreat or meditation — Attended an organised public event (e.g., exhibition, concert, fair, live sport etc.) — Visited an art gallery — Visited a museum. — Went to a local cultural centre — Watched live sport (not on TV)

Context

- **Cost-of-Living:** UK inflation, as measured by the Consumer Prices Index (CPI), started to increase during late spring 2021 and rose fairly steadily throughout the rest of 2021 and 2022, peaking at 11.1% in November 2022. The average inflation rate in the UK for 2022 based on CPI was 9.2%. This may have had an impact on the distance, duration and number of places visited on domestic visits, whereby British residents decreased the distance travelled, reduced the length of the day visit and reduced the number of locations visited on a day visit.
- **Industrial actions:** Research by the ONS found nearly 1 in 5 people had travel plans disrupted during December 2022 due to strike action in the transport sector. Almost half of those affected said they were unable to attend leisure activities.
- **Weather:** Overall, 2022 was the warmest year on record for the UK and also one of the sunniest. A new UK record temperature of 40.3°C was recorded in July, but it was June and August that were particularly sunny.
- **COVID-19:** Full lockdown lifted at end March 2021, which was replaced by a roadmap out of lockdown to July 21. However, it wasn't until February 2022 that the final restrictions on international travel were removed. According to the Visit Britain Domestic Sentiment Tracker, comfort with everyday activities such as eating in a restaurant and visiting indoor activities increased following the lifting of these final restrictions and stabilised by the end of 2022 to an 'average comfort score' of 3.2.



Summary of findings

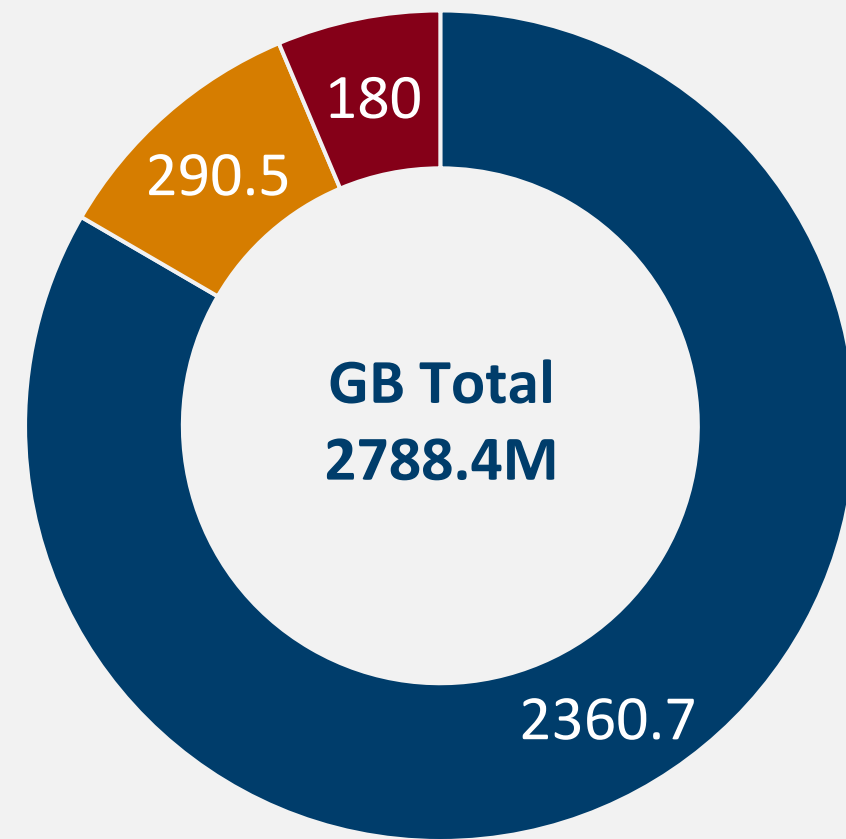
NOTE: All comparisons between 2021 and 2022 statistics are for comparable periods, April to December, of both years. All other commentary on the statistics is referencing January to December 2022.

- There were 2.8 billion leisure day visits to Great Britain lasting 3 hours or more in 2022. Of these, 1.1 billion were tourism day visits. Tourism day visits increased by 42% in 2022, when comparing April to December 2021 and April to December 2022. 373.1 million day visits were taken specifically for activities core to tourism (i.e. visitor attractions) in 2022.
- Spend on tourism day visits to Great Britain also rose in 2022 to £45.0 billion, an uplift of 46%, which may reflect rising inflation.
- There were 62.0m tourism day visits to Wales in 2022, an increase of 34%, when compared to 2021 (April to December). Spend on tourism day visits grew by 44% in the same period. Average spend rose in 2022, which could be the result of the rising costs of activities like food, drink and nights out (one of the most popular and highest average spend activities).
- Cross-nation travel significantly decreased for tourism day visits in 2022. There was a 7 percentage point drop in the proportion of visits by England residents to Scotland and a 10 percentage point fall in visits by England residents to Wales.
- Day visits to Wales are much more evenly spread across the different location types than for the other nations, which are dominated by visits to large cities and towns. In Wales, half of day visits in 2022 were to small towns and the countryside. Across Great Britain there has been a move away from seaside or coastal visits, and Wales is no different (-5pp versus 2021). Similarly, there's been an increase in day visits to cities and large towns (+6pp).
- South East Wales is the stand out destination for day visitors to Wales. While it accounts for half of all visits and spend to Wales, it also experienced a 14 percentage point increase in visits and a 15 percentage point increase in proportion of spend in 2022 (April to December), when compared to 2021 (April to December). This is largely due to an increase in the proportion of South East Wales residents taking day visits closer to home.
- There was a drop in the proportion of visits that used public transport in 2022, 2 percentage point decrease in train and 2 percentage point decrease in bus, coach or taxi. This may be due to the shorter distances travelled for day trips in 2022, which experienced a 9 percentage point increase in the proportion of visits that involved travelling 20 miles or less.
- Most tourism day visit spend was attributed to transport, food and drink and speciality shopping. In 2022, the proportion of spend on rail transport declined by 3 percentage points, in line with the decrease in use. There was a corresponding 3 percentage point increase in fuel costs, although the proportion of car use on visits remained unchanged. When compared to 2021, there was a drop in the proportion of spend on speciality shopping (-7pp).
- 1 in 5 tourism day visits to Wales were made up of older independents. In contrast to other nations, these visits have the highest average spend at £52 per visit, as apart, as the big spend visits in England and Scotland are by younger pre-nesters.

2022 GB day visit tourism statistics at a glance

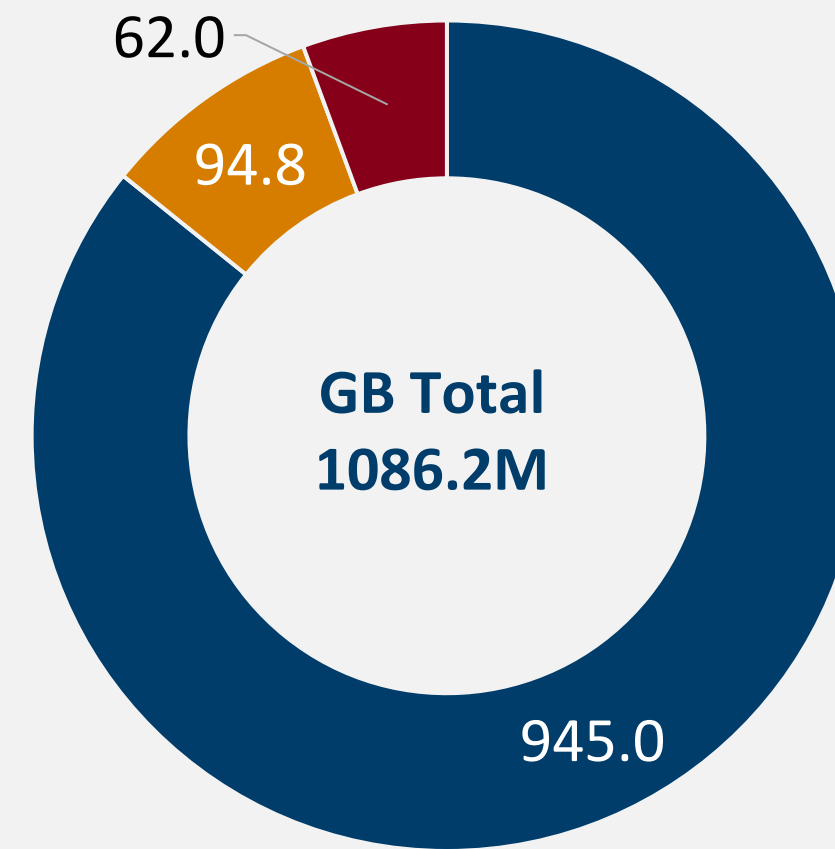
2022 3Hr+ Leisure Day Visits (millions)

■ England ■ Scotland ■ Wales



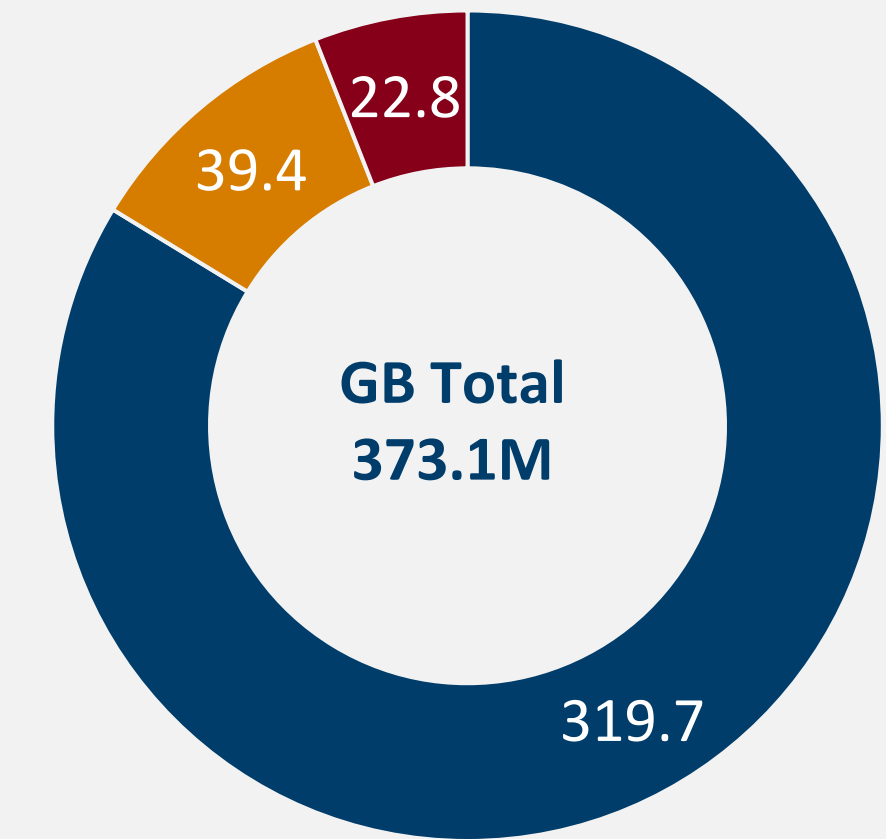
2022 Tourism Day Visits (millions)

■ England ■ Scotland ■ Wales



2022 Tourism Day Visits Activities Core to Tourism (millions)

■ England ■ Scotland ■ Wales



Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	85%	85%
Scotland	10%	9%
Wales	6%	6%

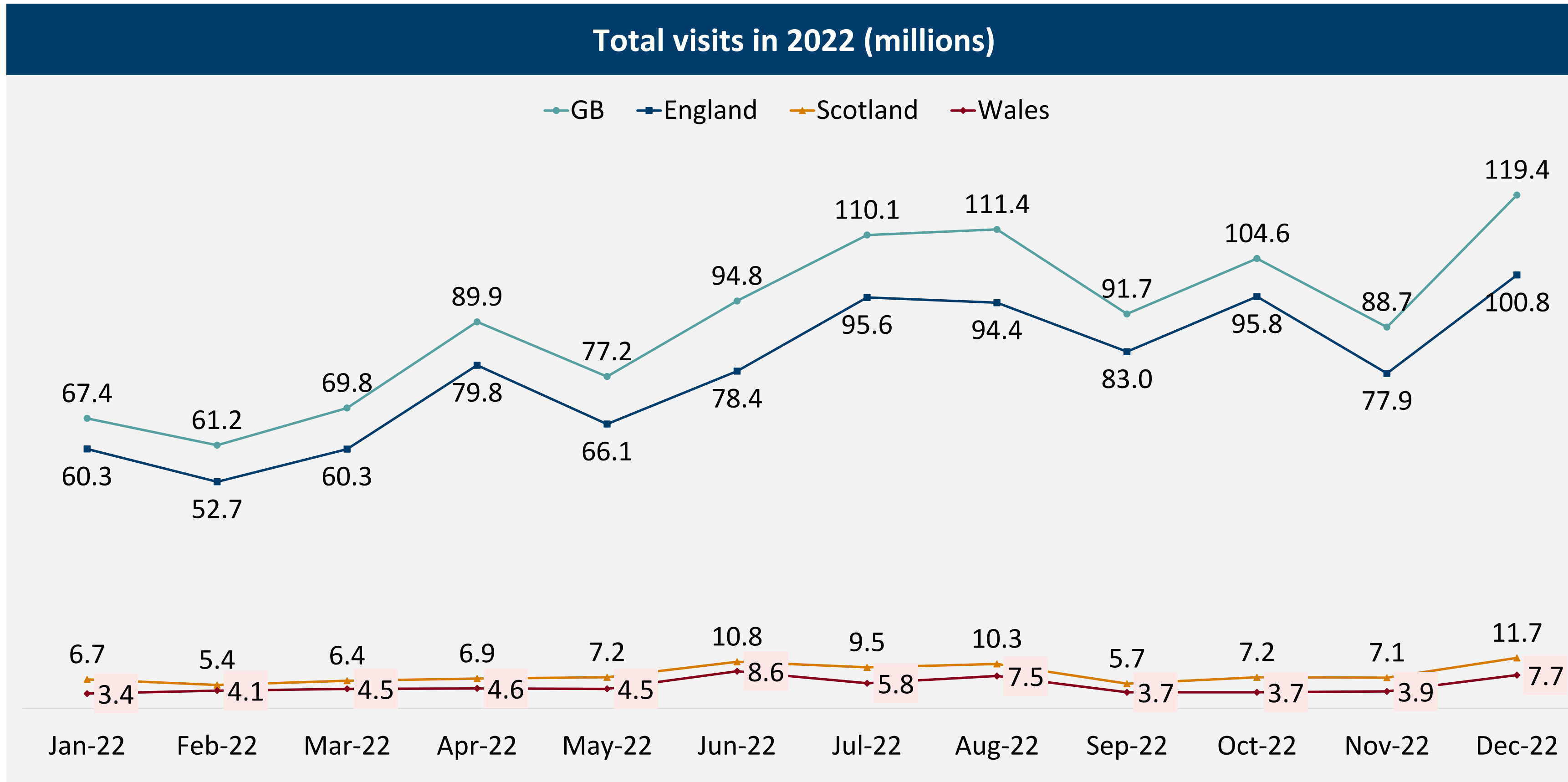
Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	87%	86%
Scotland	9%	9%
Wales	6%	5%

Nation	Proportion of Visits	Proportion of Spend
GB	100%	100%
England	86%	84%
Scotland	11%	10%
Wales	6%	5%

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

Tourism day visits by month in 2022

As with overnight trips, day visits to Great Britain peaked in December 2022 with 119.4 million visits taken, this was largely fueled by visits to friends and family around the Christmas period. Overall, 2022 (April to December) experienced 43% more day visits than in 2021 (April to December), this was due to the slow return of day visits in April and May 2021 following COVID-19 lockdowns.

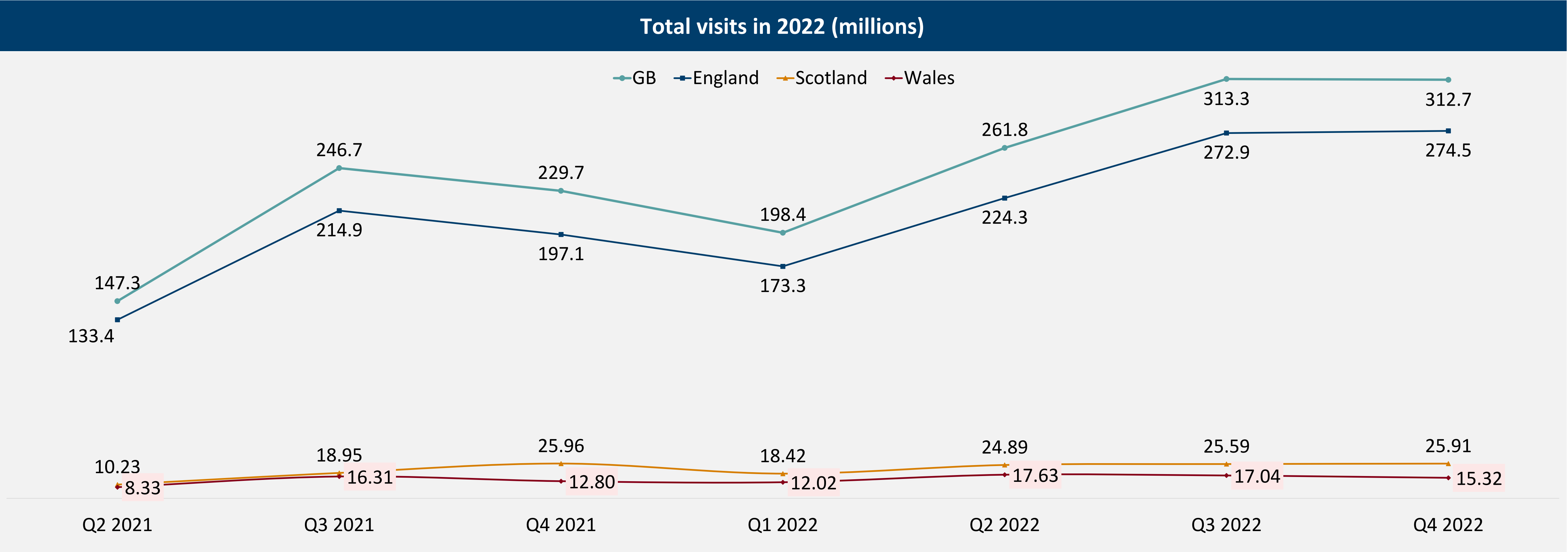


Nation	Number of visits 2022 (millions)	Proportion of visits 2022
GB	1,086.2	
England	945.0	87%
Scotland	94.8	9%
Wales	62.0	6%

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

Tourism day visits by quarter 2021-2022

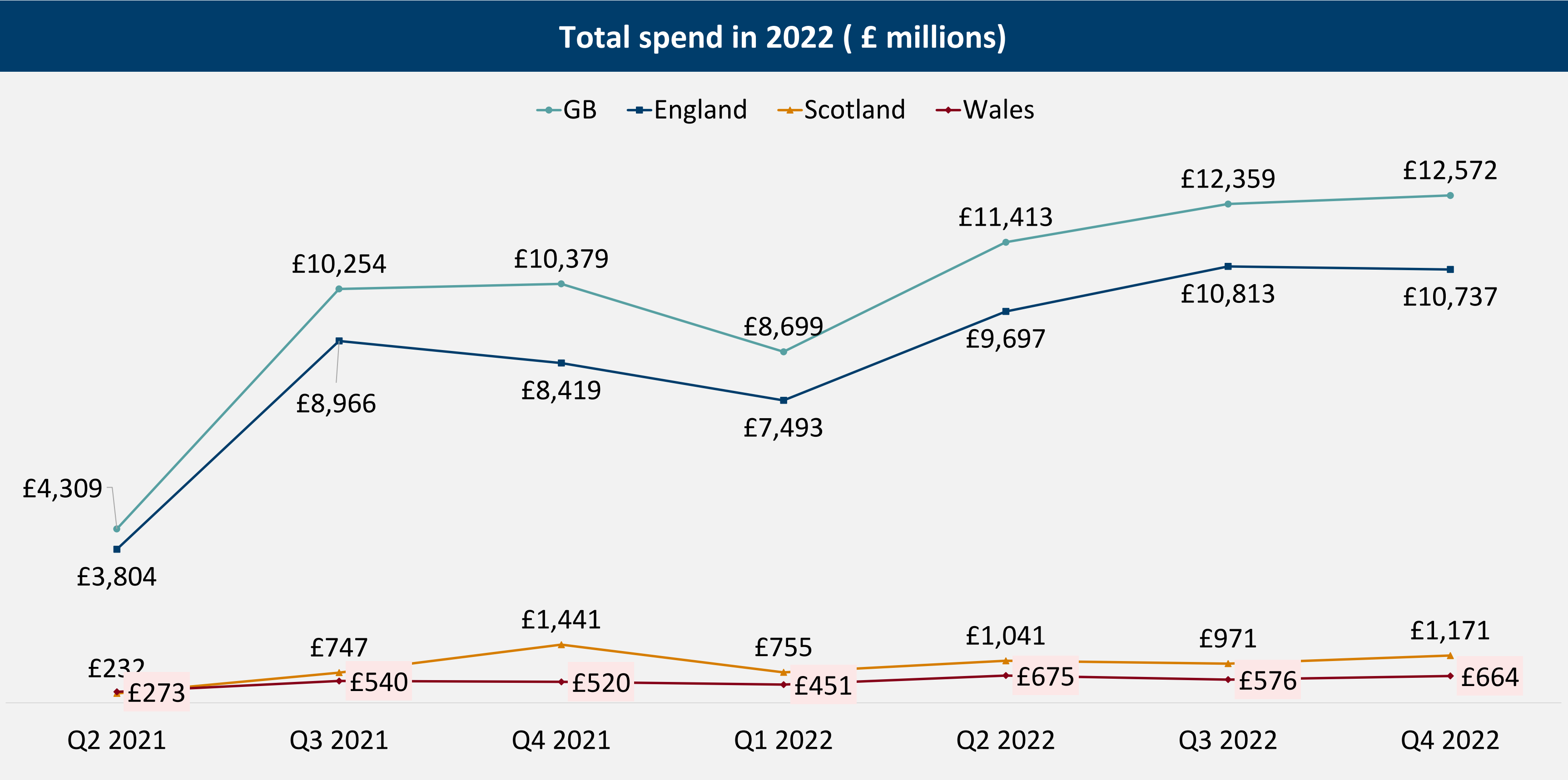
Day visits to England have steadily increased since Q2' 2021, when comparing equivalent quarters. Visits to Scotland, however, have largely remained static from Q2 2022 with a lot less seasonal variation. Visits to Wales do vary by season and Q4 2022 was 20% higher than Q4 2021.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

Tourism day visit spend by quarter 2021-2022

While the Summer (Q3) of 2022 saw record spend among domestic overnight trips to Great Britain (since the beginning of the new Survey in April 2021), Q4 2022 experienced the highest spend for day visits to Great Britain. This is due to spend in both Scotland and Wales in Q4 2022 nudging slightly above spend in Q3 for these nations.

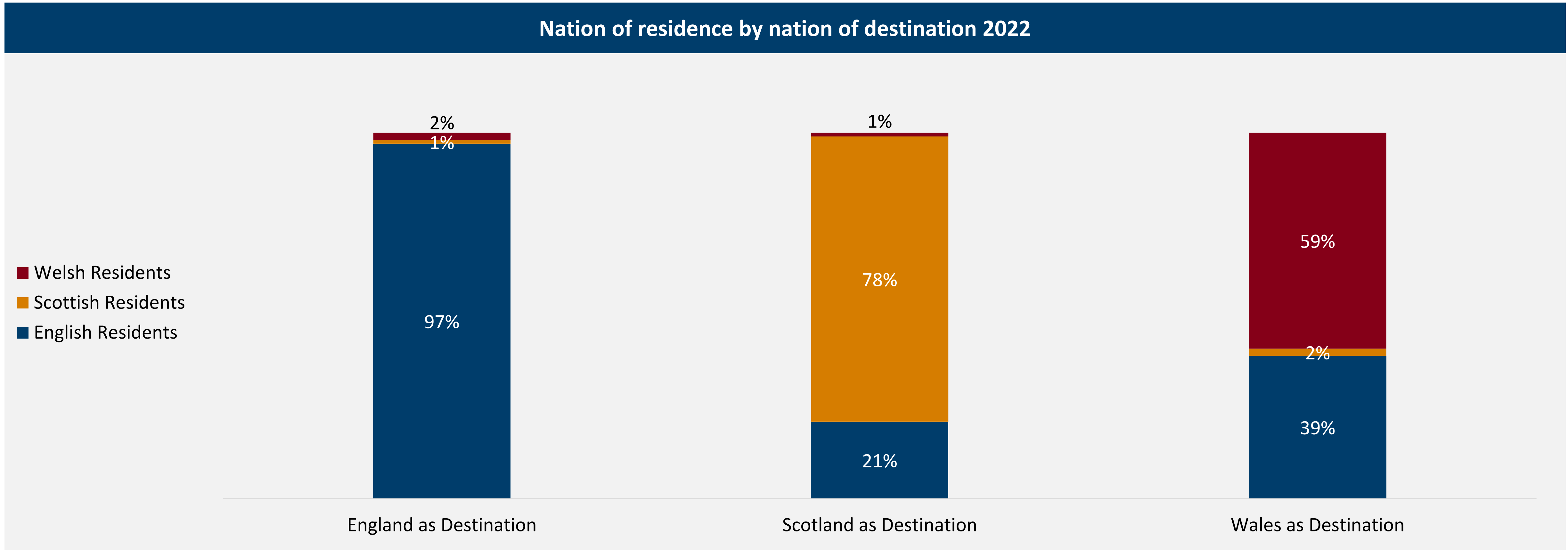


Nation	Total spend 2022 (millions)	Proportion of spend 2022
GB	£45,043	
England	£38,740	86%
Scotland	£3,937	9%
Wales	£2,365	5%

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

Nation of residence by nation of destination in 2022

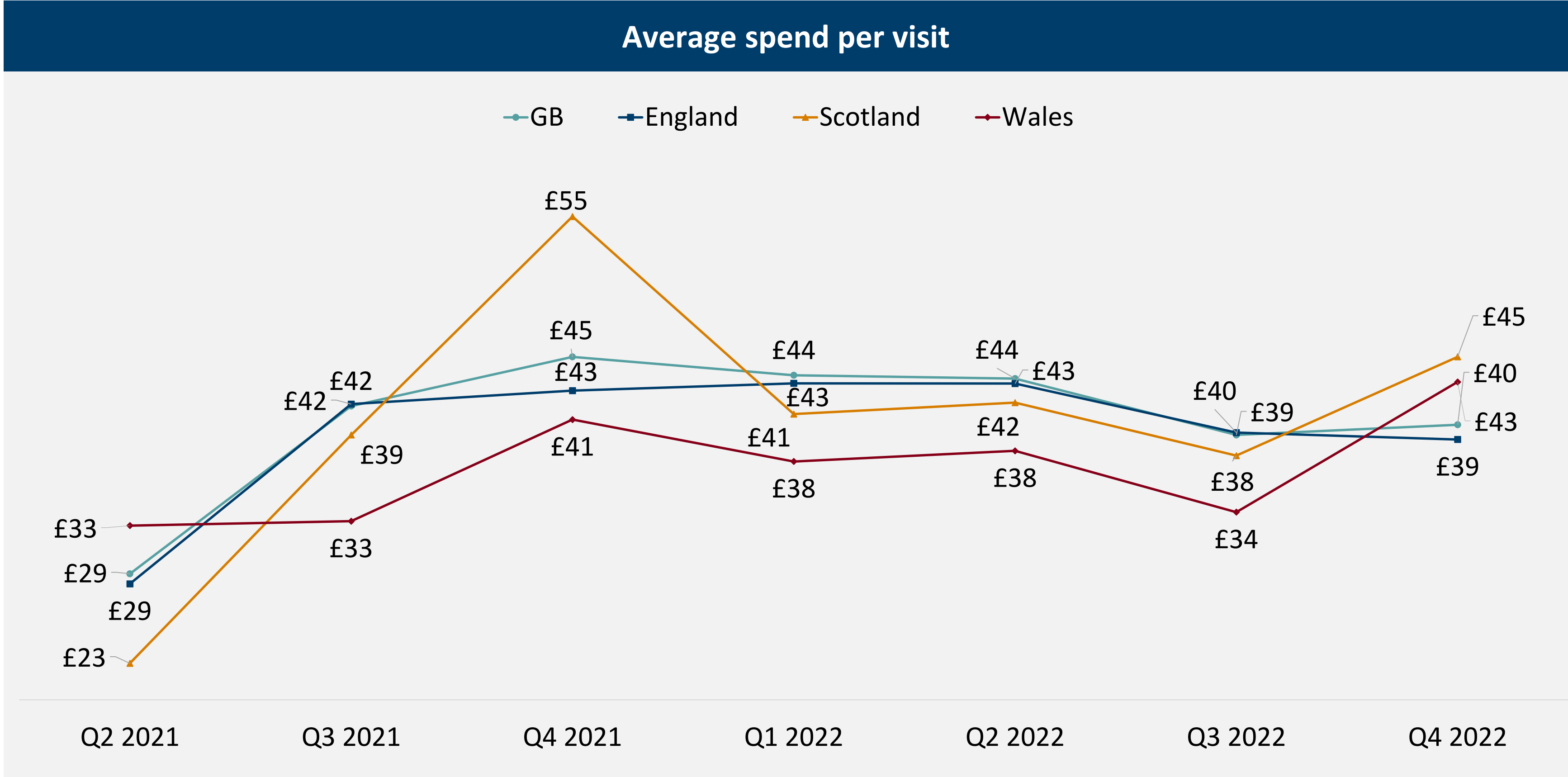
Day visits are much more nation centric than overnight trips, almost all tourism day visits to England were taken by England residents and 8 in 10 Scotland residents visited Scotland. Wales, as with overnight trips, experienced the most cross-nation visits. Interestingly, when compared to 2021 (April to December), day visits by England residents to Scotland and Wales dropped significantly in 2022 (April to December). There was a 7 percentage point decrease in the proportion of visits by England residents to Scotland and a 10 percentage point decrease in visits by England residents to Wales.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

Average spend per visit 2021-2022

Average spend per visit increased for all nations except Scotland, when comparing April to December 2021 and April to December 2022. While there were large increases in average spend on overnight trips, the increase for day visits is much more muted and appears less impacted by the rising cost of living.



Nation	Average spend per visit 2021 (April to December)	Average spend per visit 2022 (April to December)
GB	£40	£41
England	£39	£40
Scotland	£44	£42
Wales	£36	£38

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: GB 10,461; England 8,219; Scotland 1,312; Wales 1,035

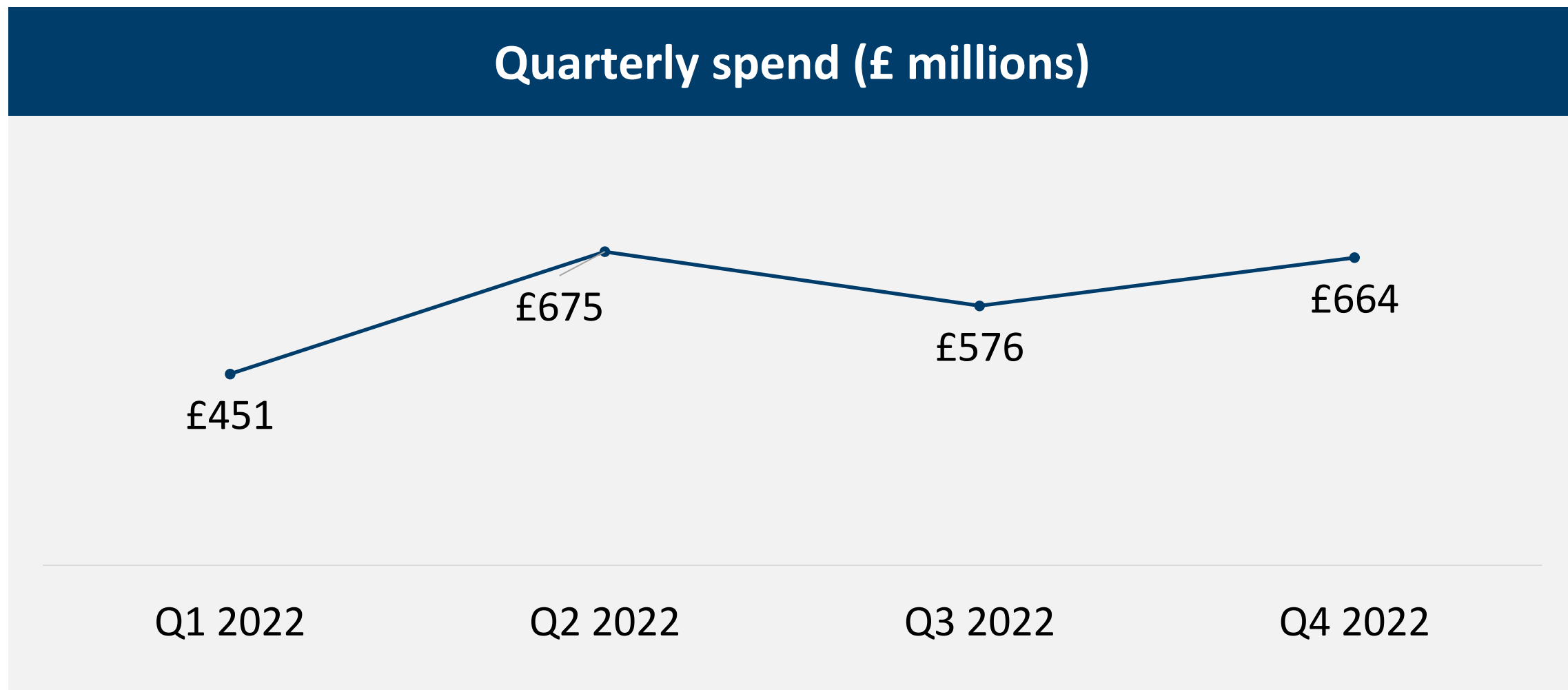
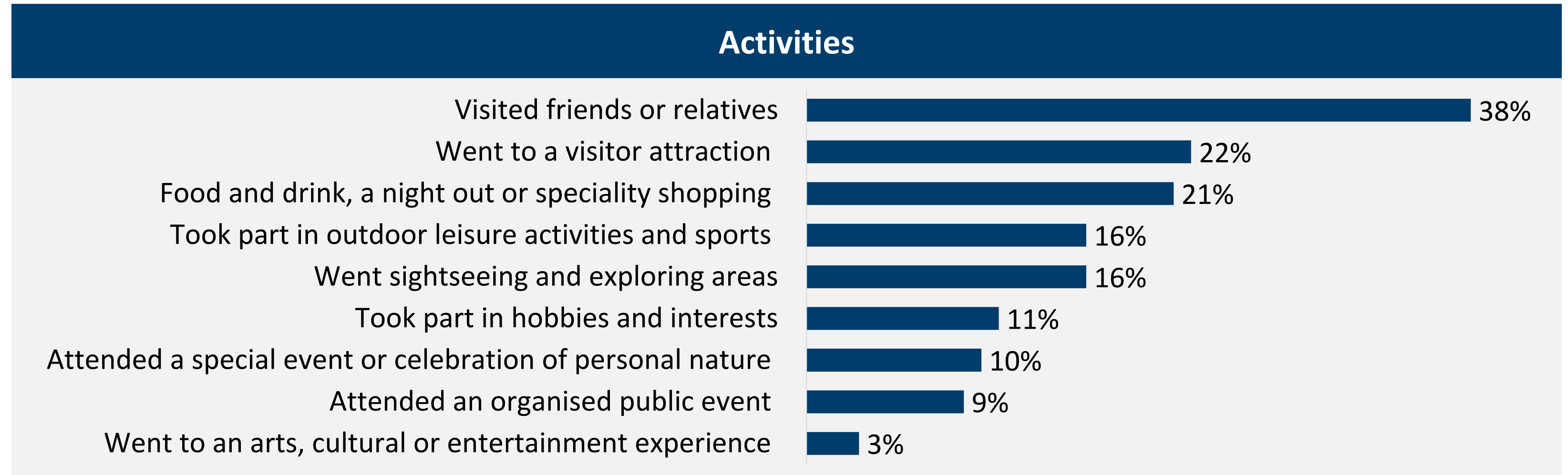
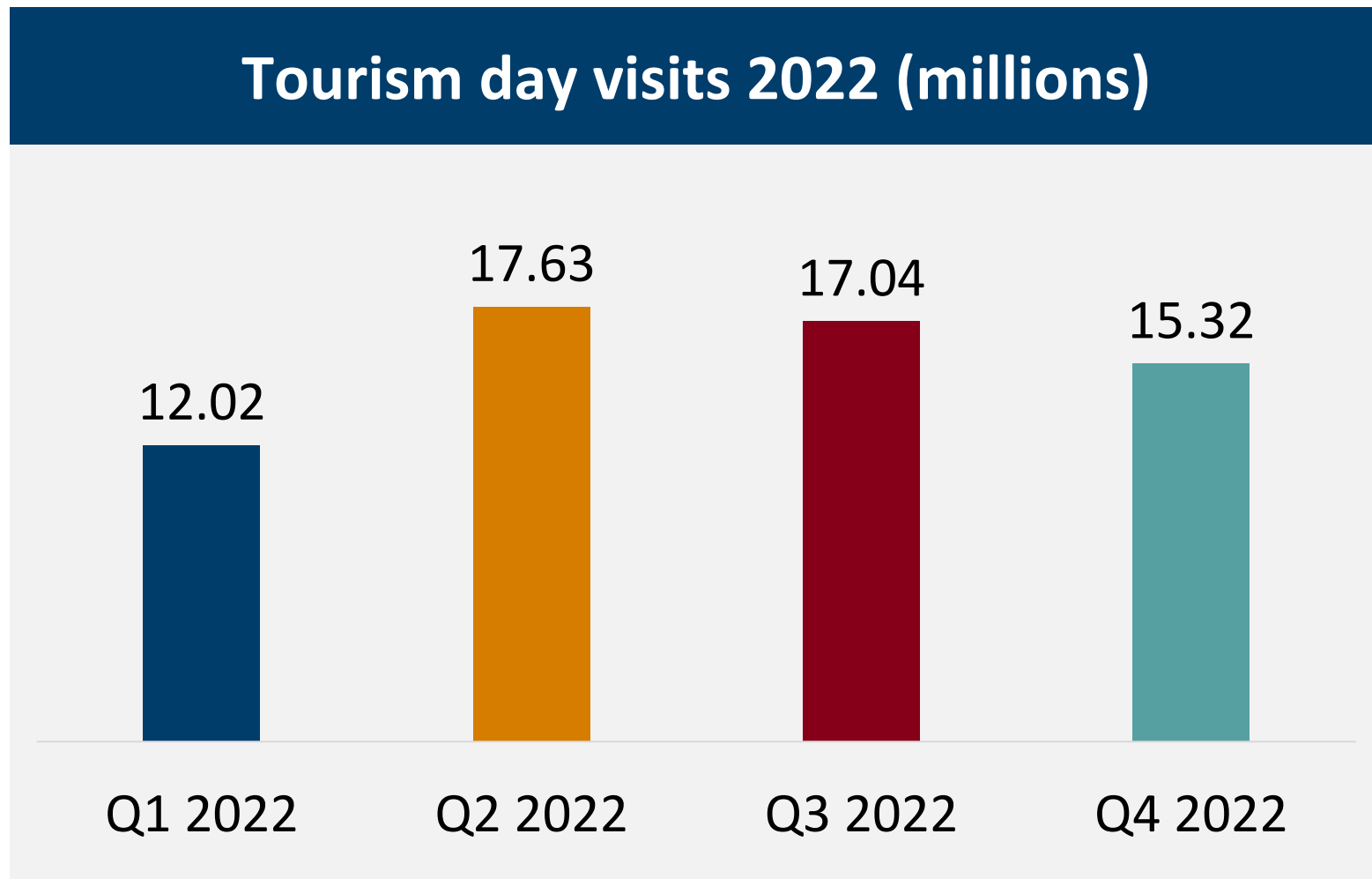
Wales

Tourism day visits

2021-2022

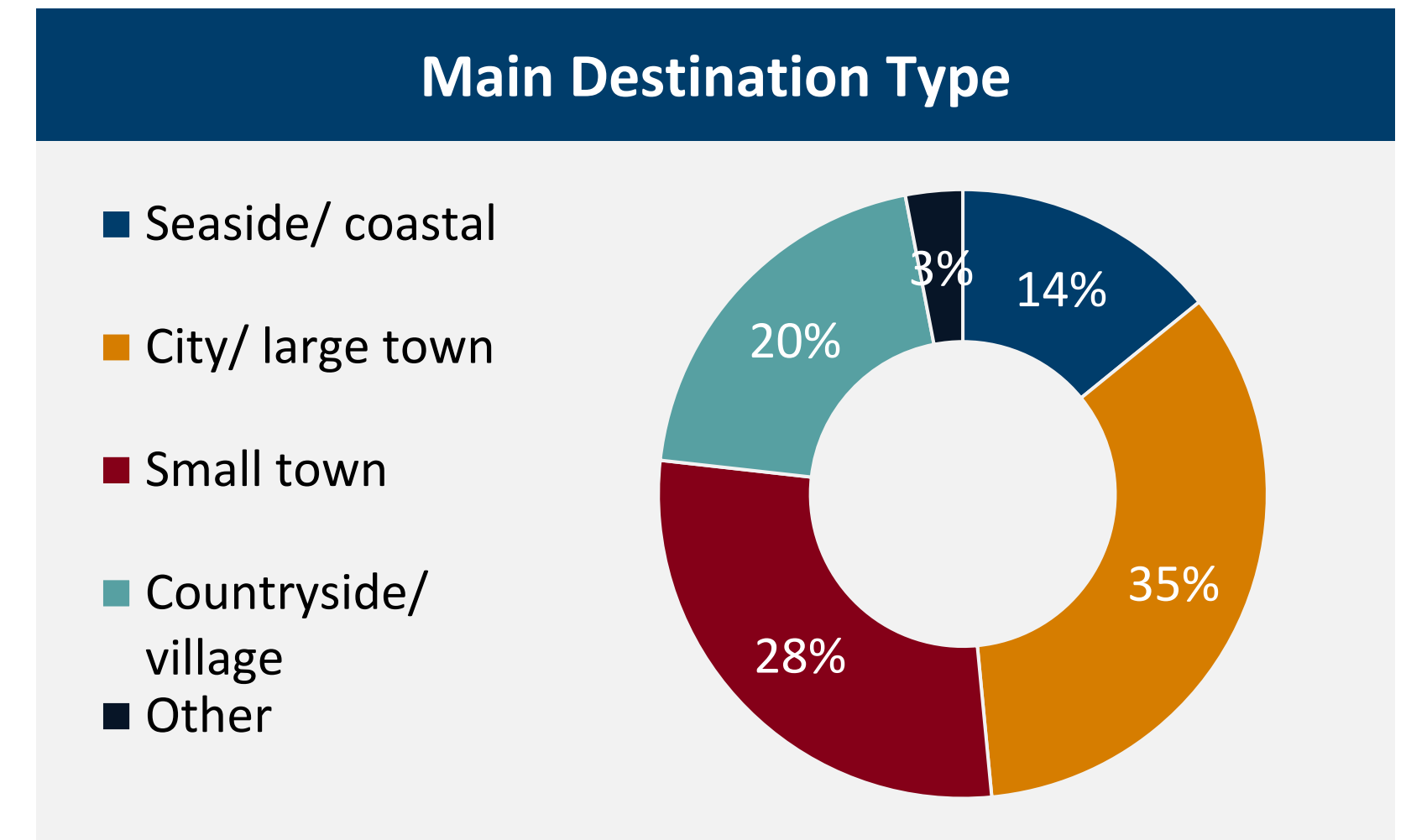


Summary of tourism day visits to Wales in 2022



Average spend per visit

Q1 2022	£38
Q2 2022	£38
Q3 2022	£34
Q4 2022	£43



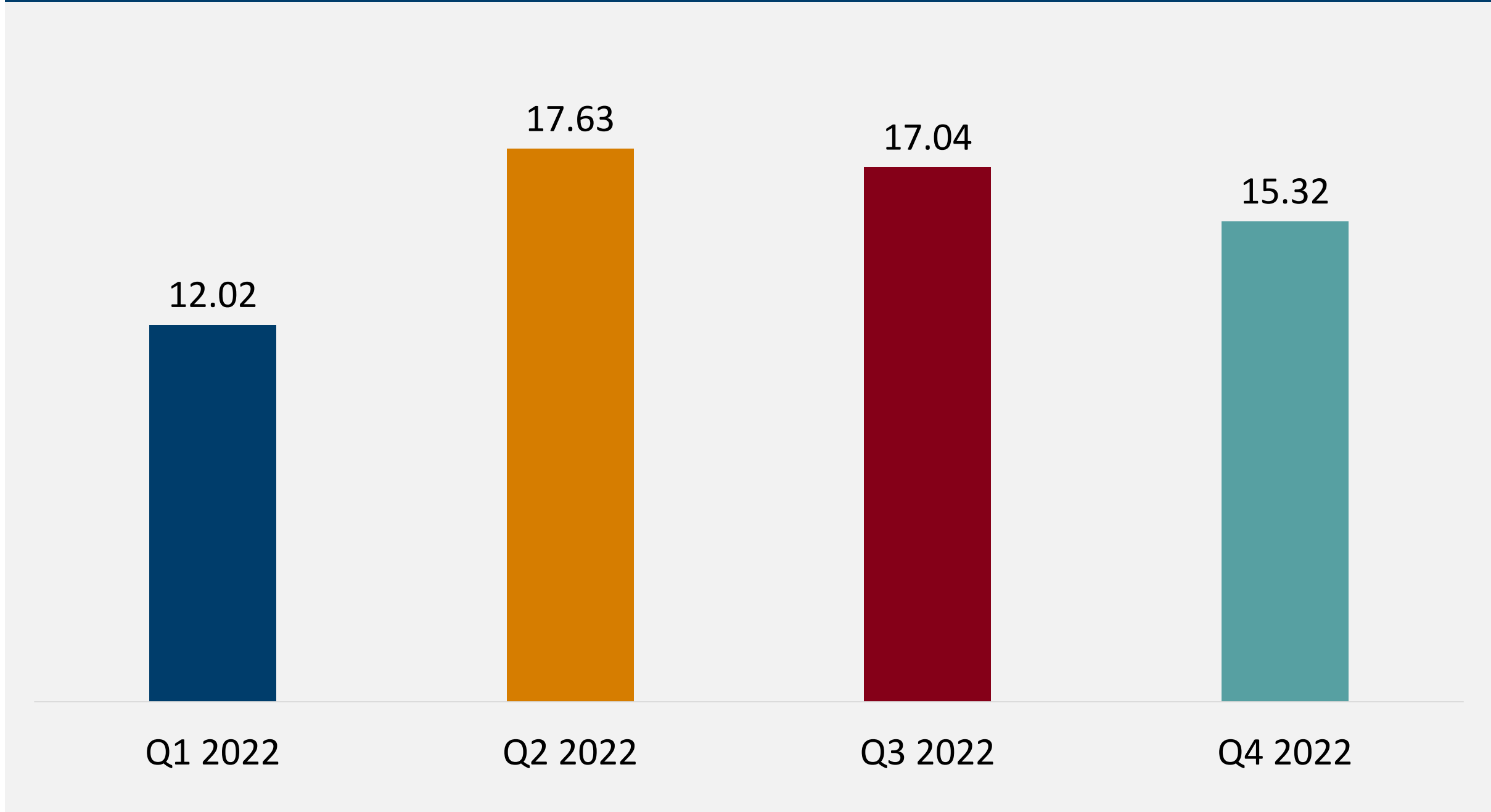
Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Tourism day visits and spend in Wales 2022

Tourism day visits to Wales in 2022 (April to December) increased by 34%, when compared to 2021 (April to December). Spend on tourism day visits increased by 44% in the same period. This means that average spend increased in 2022, which could be the result of inflation. There is an evident dip in day visits and spend in Q3 2022, which may be due to the summer holiday period where day visits are substituted for overnight trips.

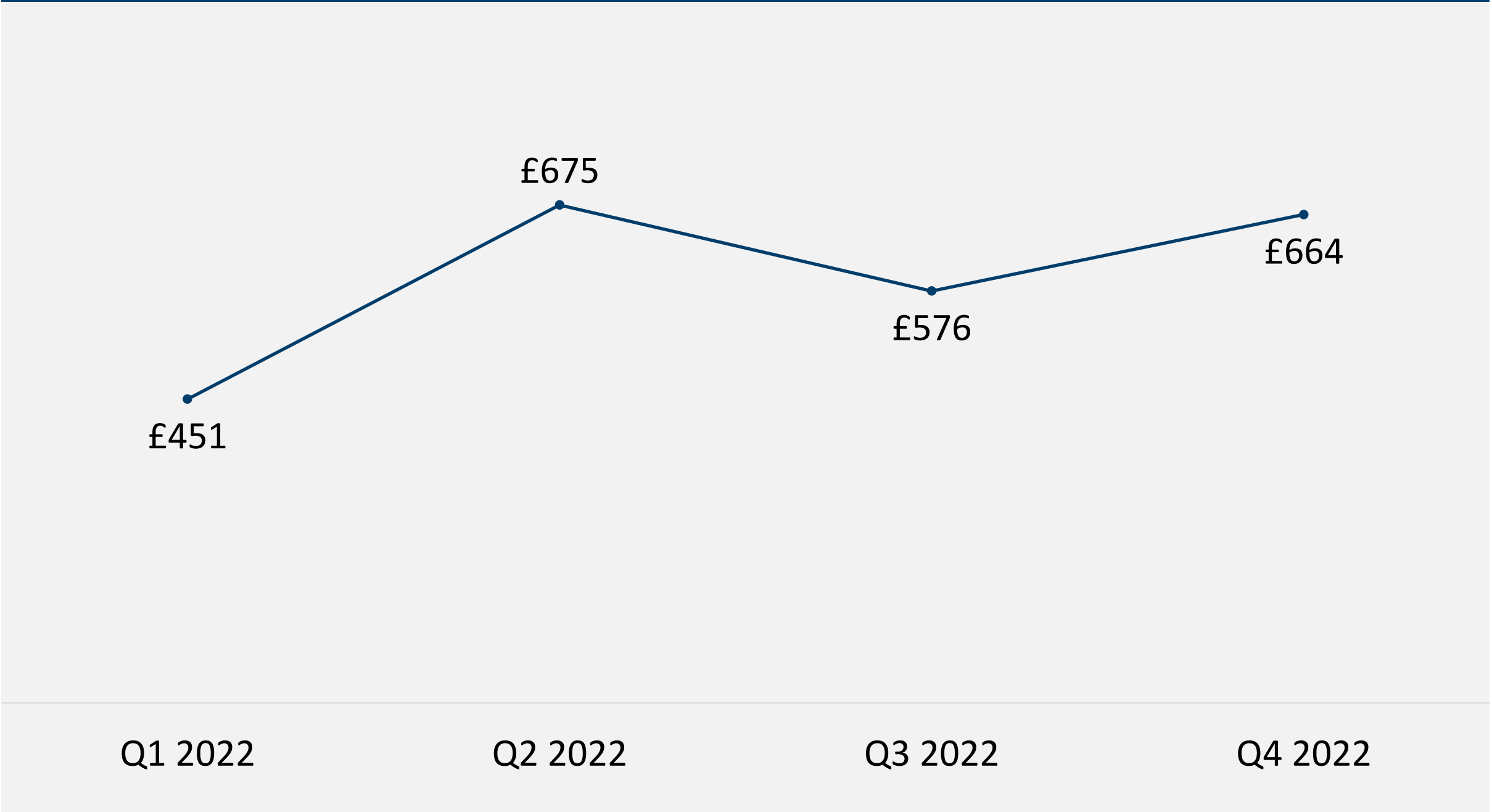
62.0m visits

Tourism day visits to Wales by quarter 2022



£2,365m spend

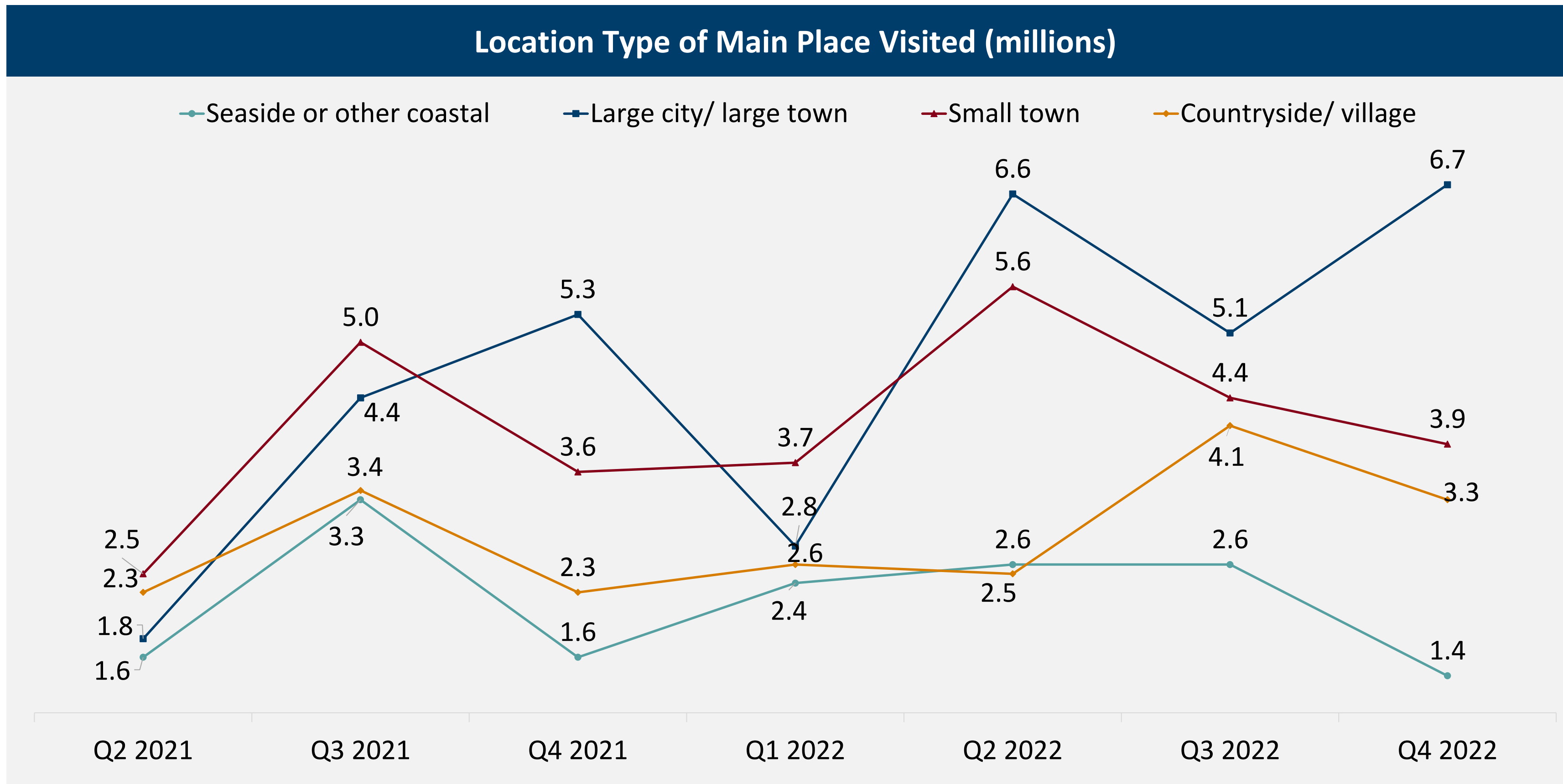
Quarterly spend (£ millions) in Wales 2022



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Location type of main place visited

Day visits to Wales are much more evenly spread across the different location types than for the other nations, which are dominated by visits to large cities and towns. Across Great Britain there has been a move away from seaside or coastal visits, and Wales is no different (-5pp versus 2021). Similarly, there's been an increase in day visits to cities and large towns (+6pp). While Scotland's small towns were displaced by visits to cities and large towns, the proportion of visits to small towns in Wales have remained static.

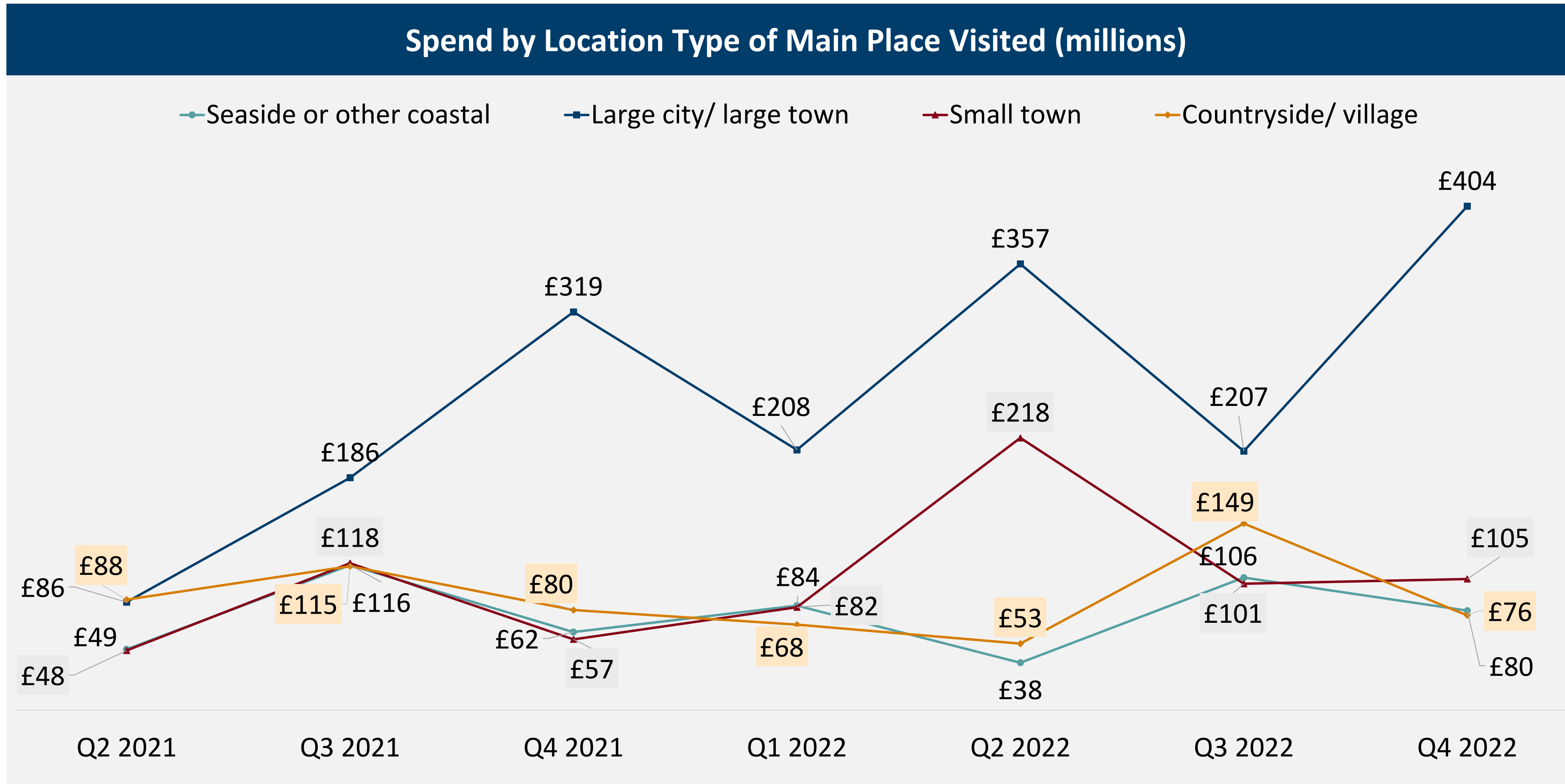


Location Type	Visits 2022 (millions)	Proportion of visits
Seaside or other coastal	8.99	14%
Large city / large town	21.29	34%
Small town	17.51	28%
Countryside / village	12.51	20%

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: Wales 1,035

Spend by location type of main place visited 2022

Half of tourism day visit spend is in large cities and towns, followed by small towns, both of which increased their proportion of day visit spend in 2022 (+7pp and +5pp respectively). The proportion of spend in the seaside (-5pp) and countryside (-6pp) in Wales decreased in 2022 (April to December), when compared to 2021 (April to December). This is in contrast England, where the proportion of spend on visits to the countryside increased substantially in 2022.

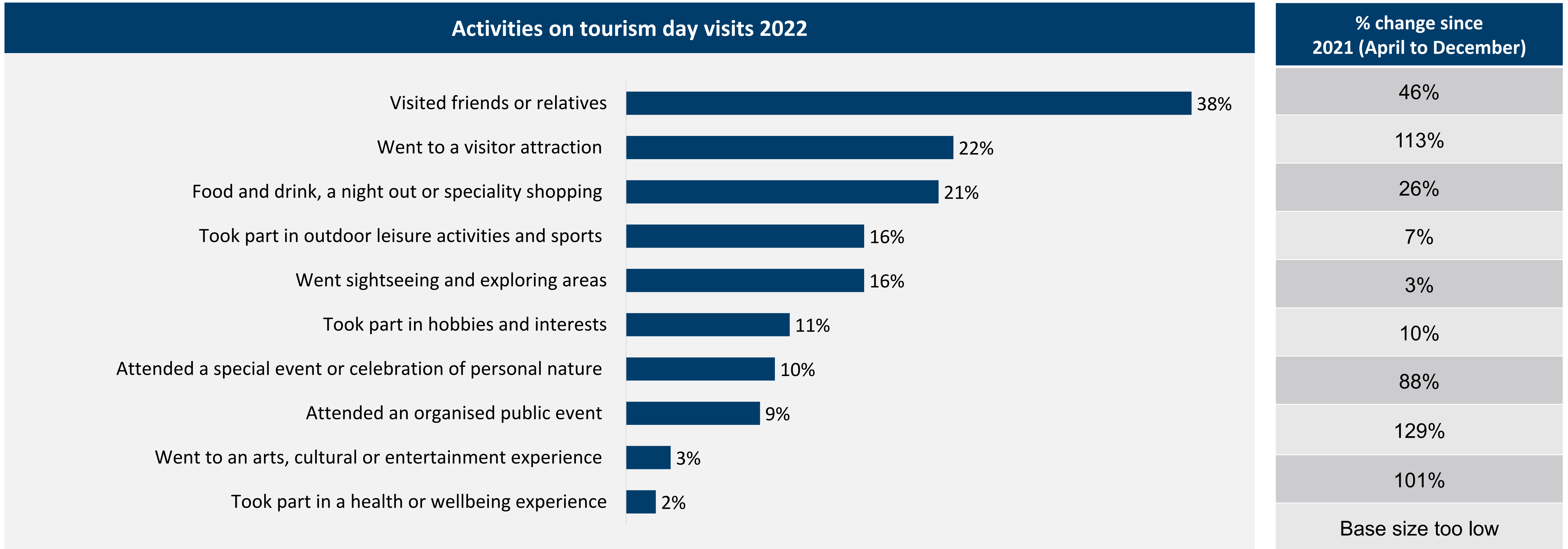


Location Type	Spend 2022 (millions)	Proportion of Spend
Seaside or other coastal	£307	13%
Large city / large town	£1,177	50%
Small town	£506	21%
Countryside / village	£347	15%

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Activities undertaken on tourism day visits 2022

The majority of tourism day visits included activities such as visiting friends or relatives, going to a visitor attraction or food, drink, a night out, or speciality shopping. This is largely the same across Great Britain. Visits where the main activities were attending organised public events and going to visitor attractions, significantly increases in 2022, as the events and attractions sectors returned following COVID-19 restrictions.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

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

Spend on tourism day visits by activity 2022

Although day visits that included attending a visitor attraction increased in 2022, there was no change in the proportion of spend on day visits that included this activity. Visits to attend an organised public event experienced the second highest average spend, at £44 per visit. Visits that included food and drink, night out or speciality shopping were some of the most popular and highest spend, representing 1 in 5 visits and accounting for 37% of visit spend in Wales.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

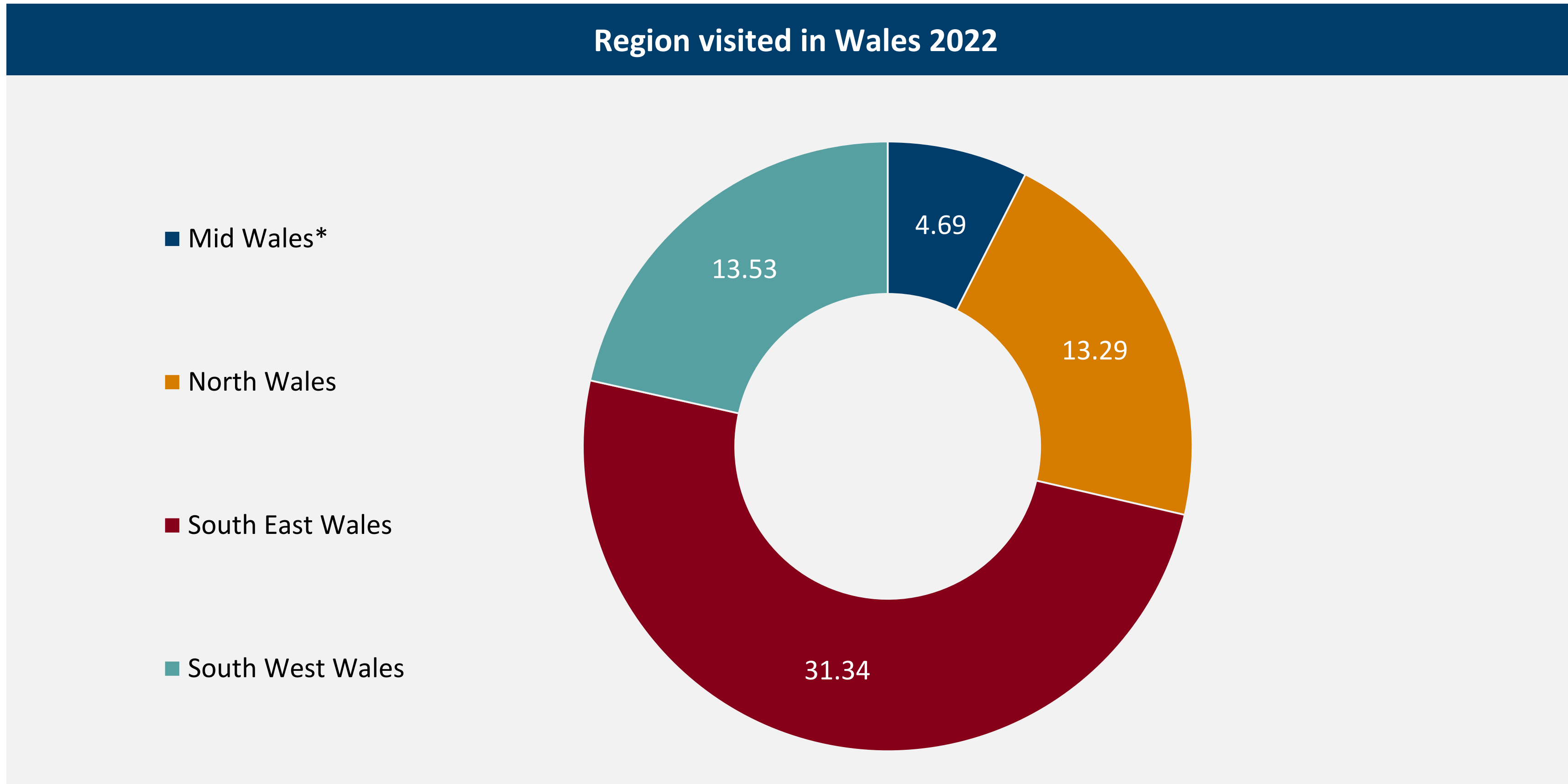
NOTE: Slide shows the proportion of visits and spend which involved each activity, it adds up to more than 100% as more than one activity could be undertaken on a visit.

Wales Profile of visits



Visits and spend by region visited 2022

South East Wales is the most popular destination for day visitors to Wales. While it accounts for half of all visits and spend to Wales, it also experienced a 14 percentage point increase in visits and a 15 percentage point increase in proportion of spend in 2022 (April to December), when compared to 2021 (April to December). This is largely due to an increase in the proportion of South East Wales residents taking day visits closer to home.



Region	Proportion of Visits 2022	Proportion of Spend 2022
Mid Wales*	8%	4%
North Wales	21%	19%
South East Wales	51%	53%
South West Wales	22%	23%

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

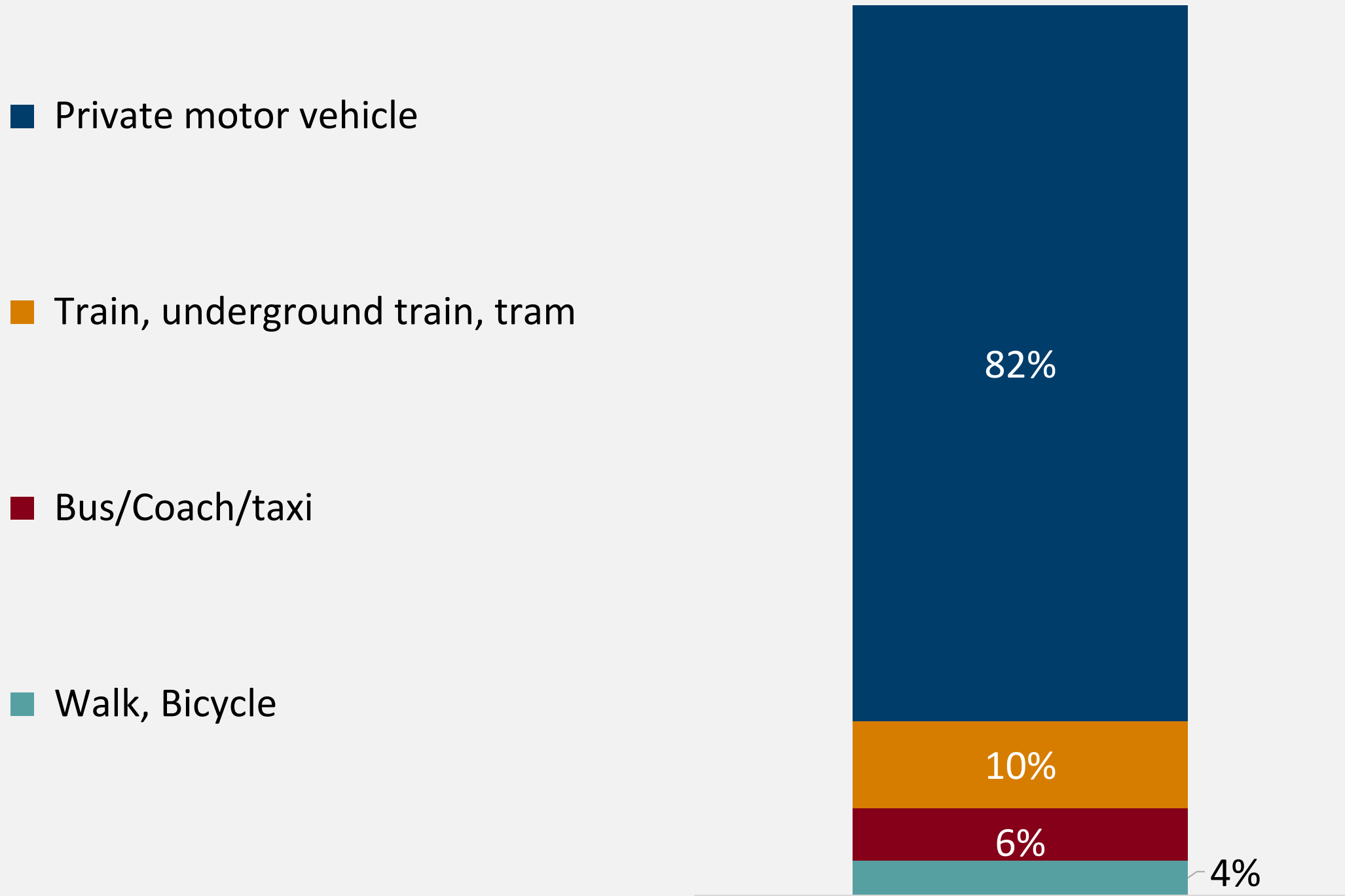
Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022

Base: Wales 1,035

Transport used 2022

Private motor vehicles were used for the majority of tourism day visits in 2022. Although there was no change in the proportion of visits that used a car since 2021, car ownership increased by 2 percentage points. There was a drop in the proportion of visits that used public transport in 2022, 2 percentage point decrease in train and 2 percentage point decrease in bus, coach or taxi. This may be due to the shorter distances traveled for day trips in 2022.

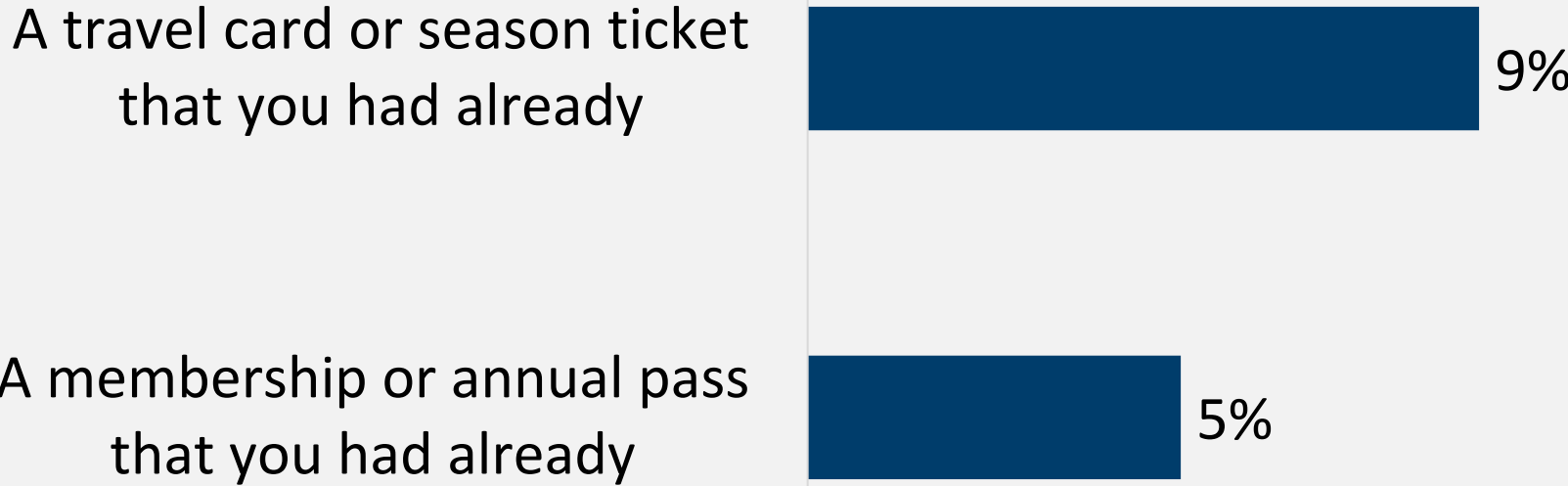
Transport Used in 2022



Duration of visit in 2022

90%

Use of travel card

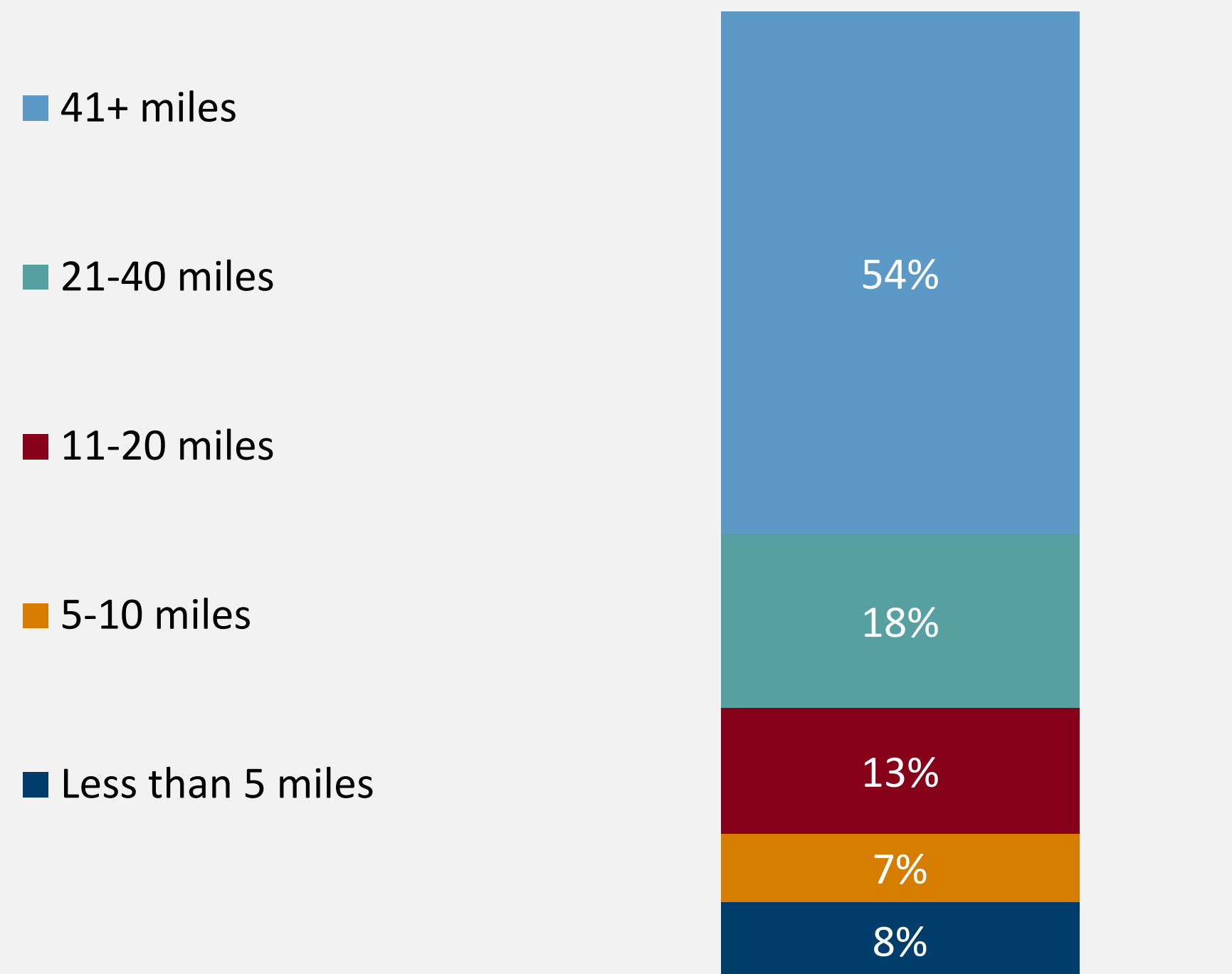


*Base size under 30 not shown
 Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
 Base: Wales 1,035

Distance travelled and number of places visited

In 2022, there was an increase in the proportion of tourism day visits that involved travelling 20 miles or less (+9pp), and a corresponding decrease (-9pp) in the proportion that travelled 21+ miles. Visits to Wales were also slightly shorter in 2022, with a 2 percentage point increase in the proportion that lasted less than 5 hours. The majority of day visits went to just one place, a 6 percentage point increase on 2021. There was a similar trend in overnight trips, which reduced in length and number of places visited. This may be in response to the cost of living crisis.

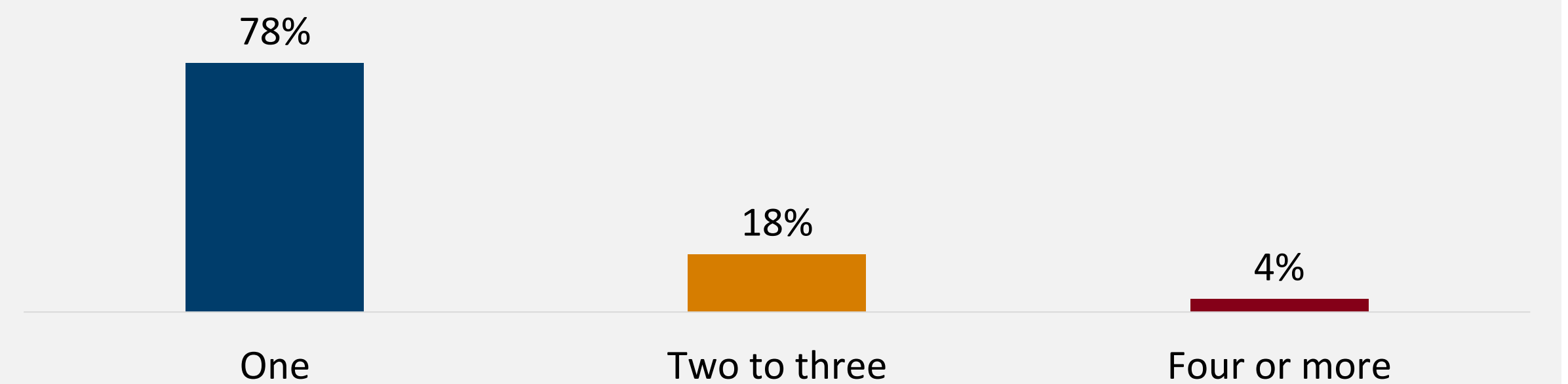
Distance travelled in 2022



Duration of visit in 2022



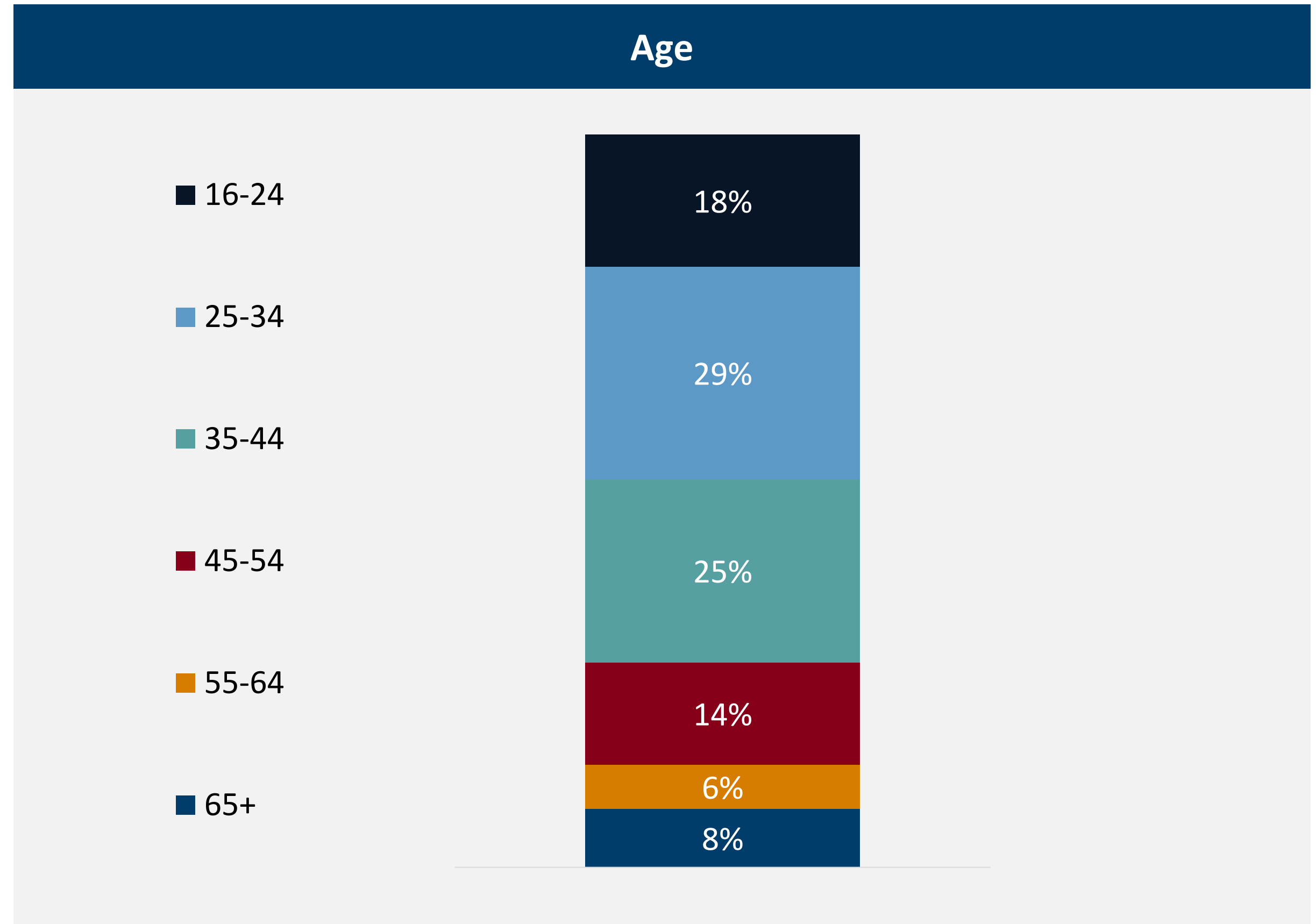
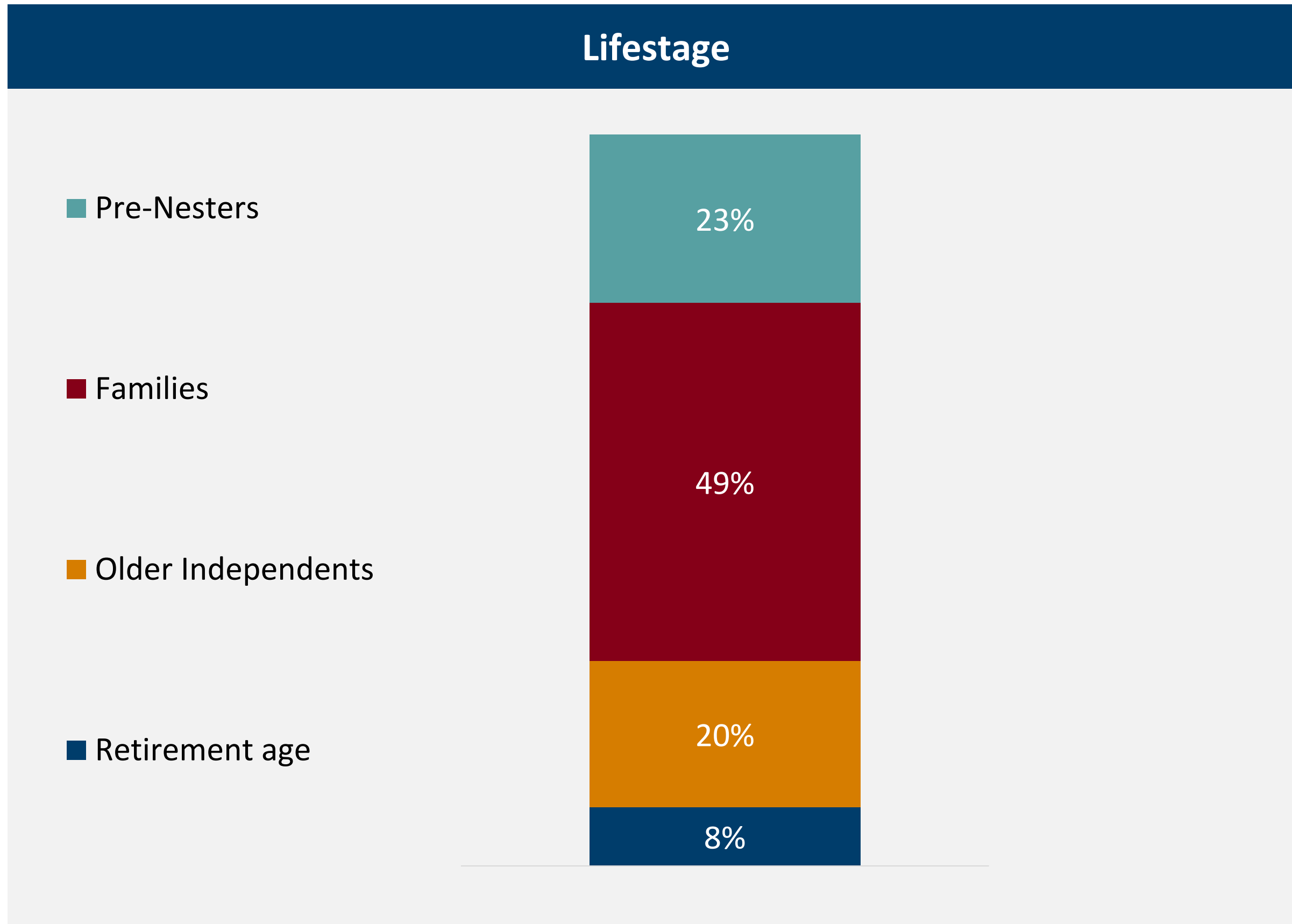
Number of places visited in 2022



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Lifestage and age profile for day visits 2022

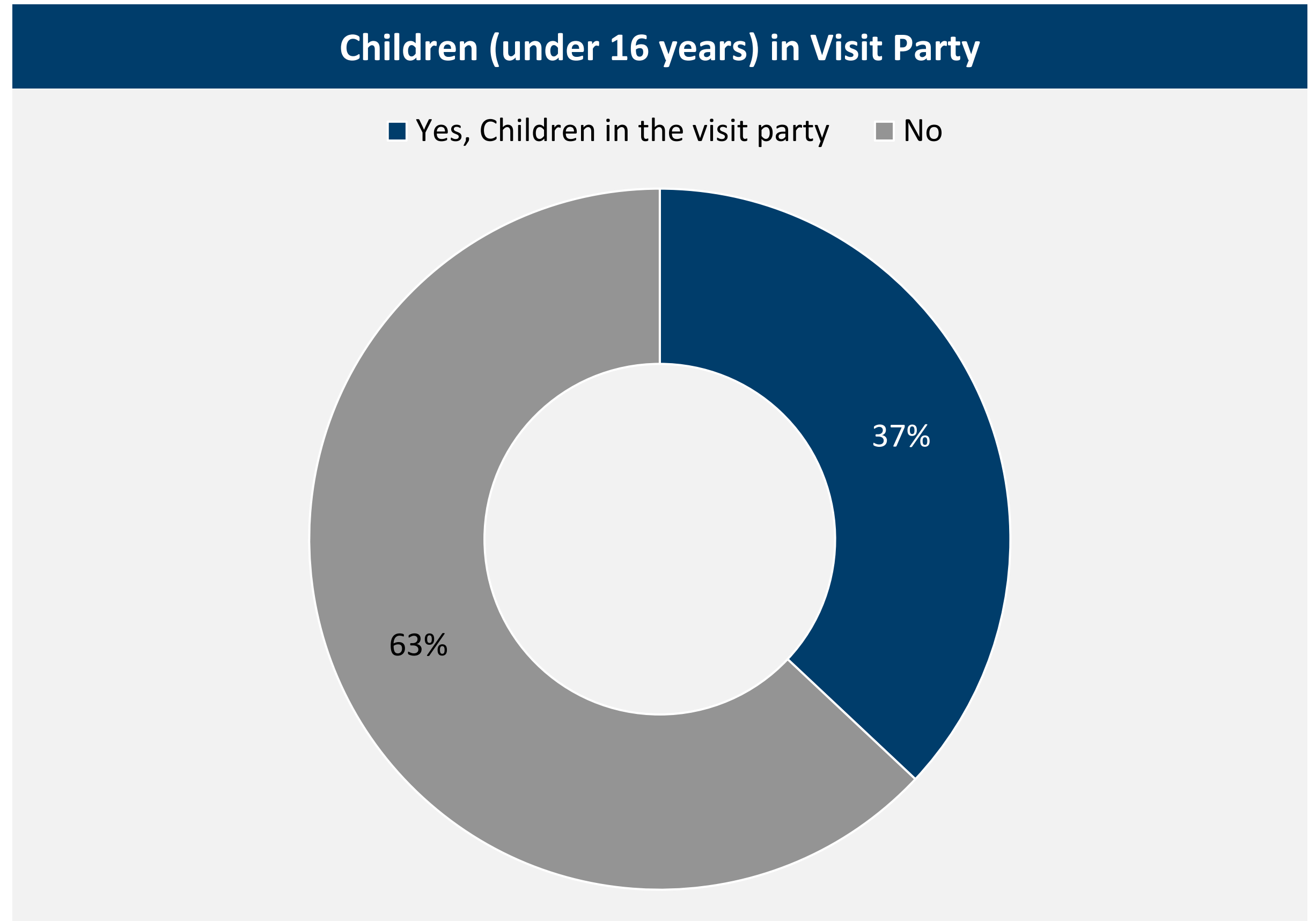
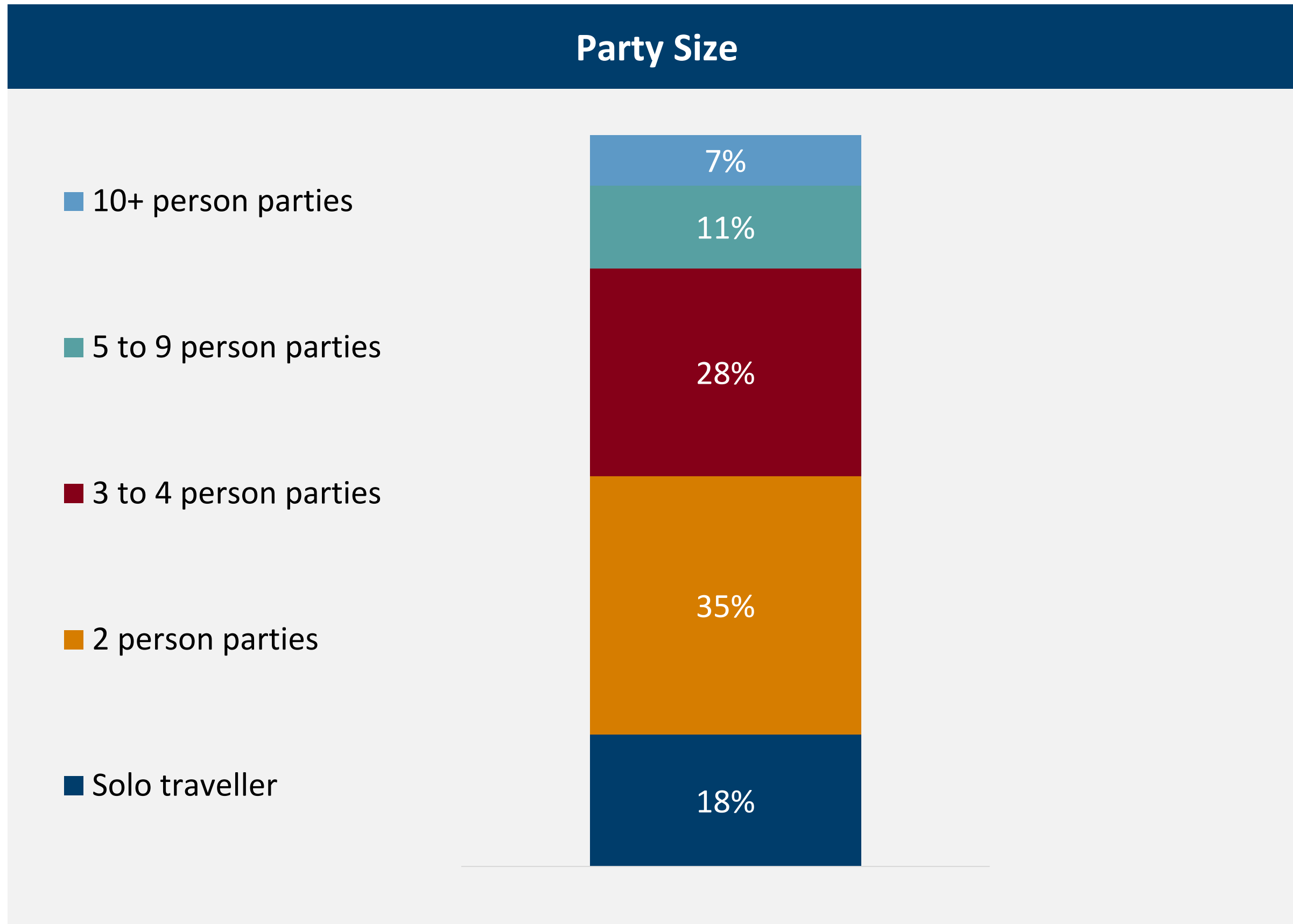
1 in 5 tourism day visits to Wales were made by older independents. In contrast to other nations, these visits have the highest average spend at £52 per visit, versus £38 per visit overall. While the proportion of visits by 45-64 year olds dropped in 2022 (-8pp) these also have the highest average spend in Wales. This sets Wales apart, as the big spend visits in England and Scotland are by younger pre-nesters.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Visit party size 2022

While the majority of tourism day visits to Wales consisted of parties of 2 or less, there was a 3-percentage point increase in the proportion of day visits with 10+ person parties in 2022. The proportion of day visits with children on the visit decreased in 2022 by 4 percentage points, which is the same percentage decrease experienced in overnight trips to Wales. This is despite there being an increase in the proportion of day visits with children in the household.



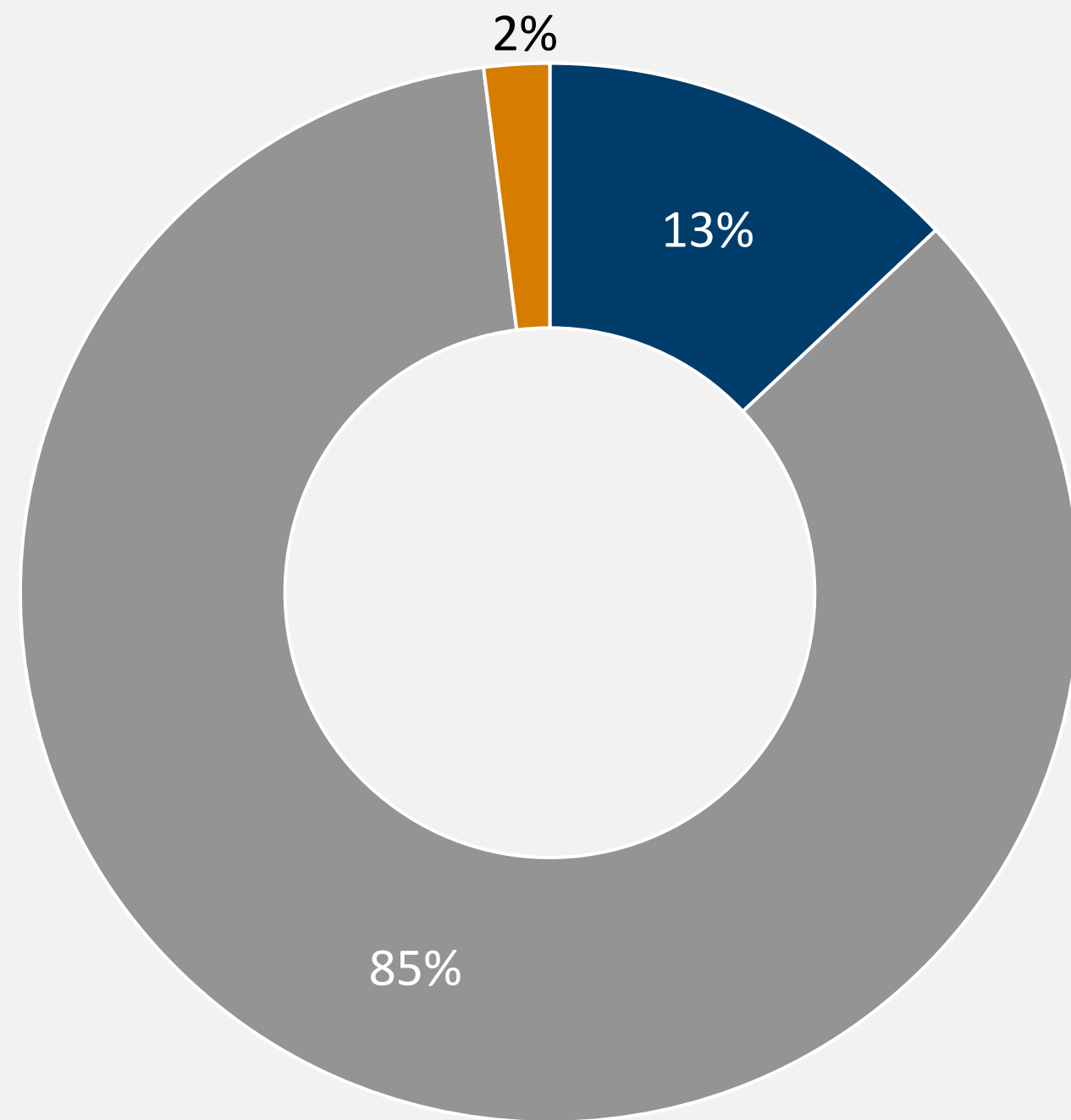
Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Visit party composition 2022

Just 1 in 10 visits to Wales were part of a larger group (e.g. a coach party, tour group, school trip) in 2022, which is a decrease of 2 percentage points when compared to 2021. Celebrations and travelling with a team or social club were the most popular type of large group in 2022. In contrast to overnight trips, average spend for day visits with a large group (£34) is smaller than those not with a large group (£39).

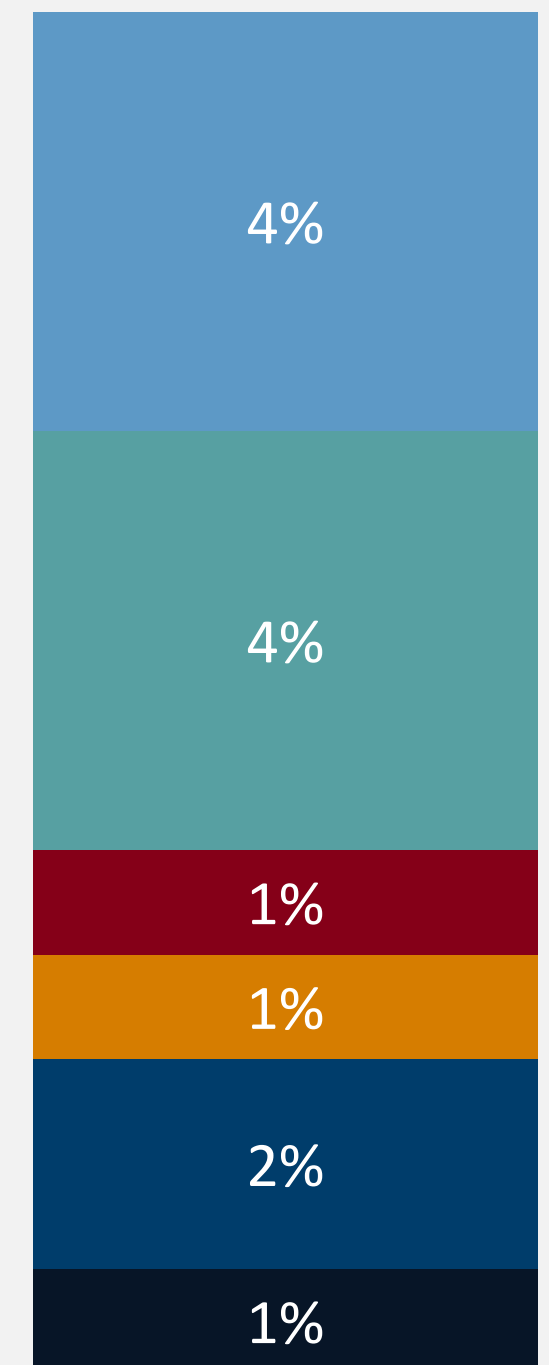
Part of a Larger Party

■ Part of a Large Party ■ Not part of a Large Party ■ Don't know



Large Party Type

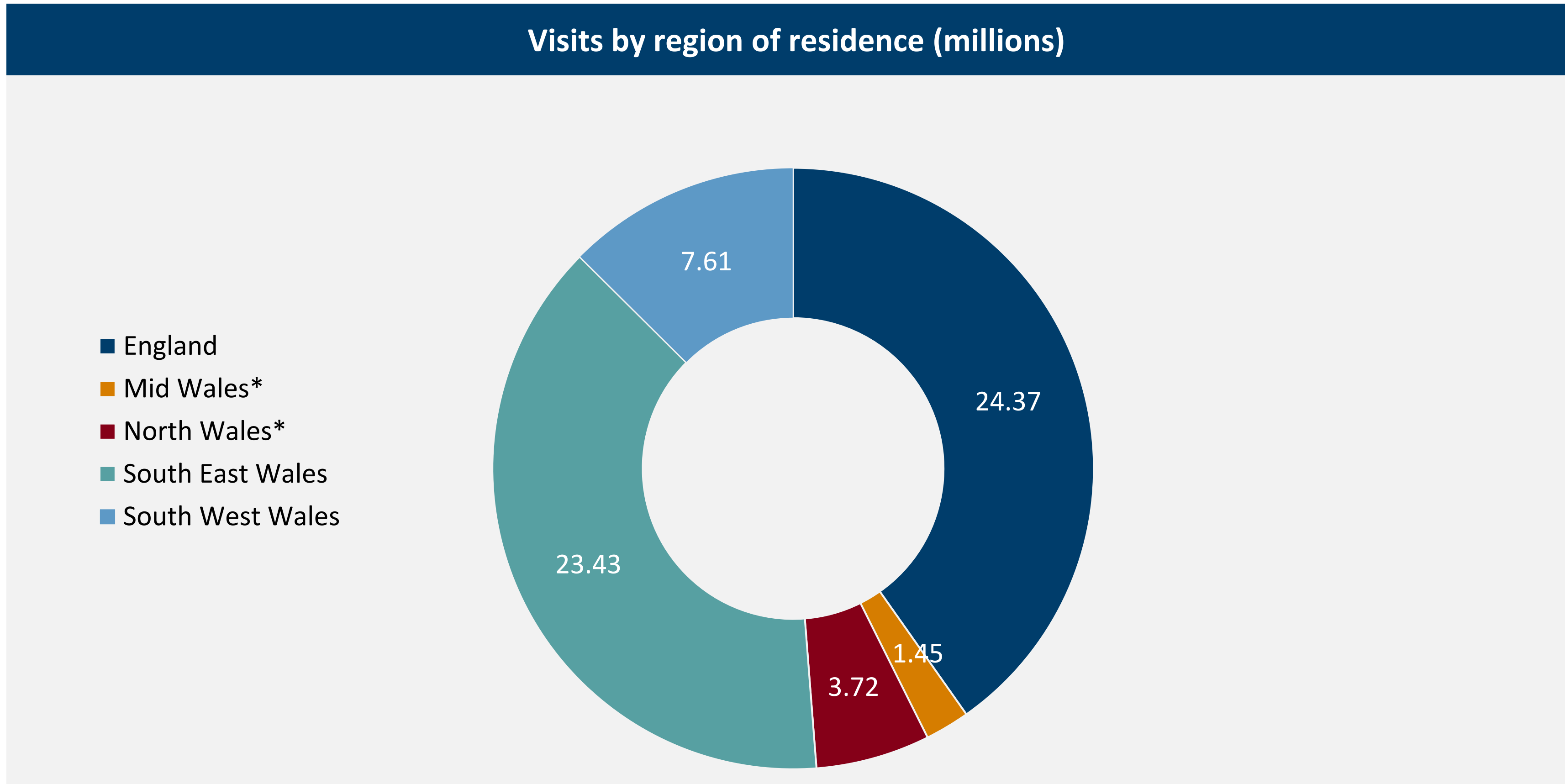
- Yes, as part of a celebration (e.g. birthday, anniversary, stag do etc.)
- Yes, travelling with a team or club (e.g. a sports team, social club or other special interest group)
- Yes, as part of another type of larger group
- Yes, as part of a school or other educational trip
- Yes, as part of an organised tour group
- Yes, as part of a business trip or work outing



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Visits and spend by region of residence 2022

The majority of day visits to Wales are made by England and South East Wales residents. There was a 12 percentage point increase in the proportion of visits by South East Wales residents in 2022 (April to December) versus 2021 (April to December). This would explain the increase in South East Wales visits and the shorter distances travelled in 2022. As highlighted previously, there was a 10 percentage point decrease in proportion of England residents visiting Wales in 2022.



Region	Proportion of Visits 2022	Proportion of Spend 2022
England	39%	39%
Mid Wales*	2%	2%
North Wales*	6%	4%
South East Wales	38%	38%
South West Wales	12%	13%
Scotland	**	**

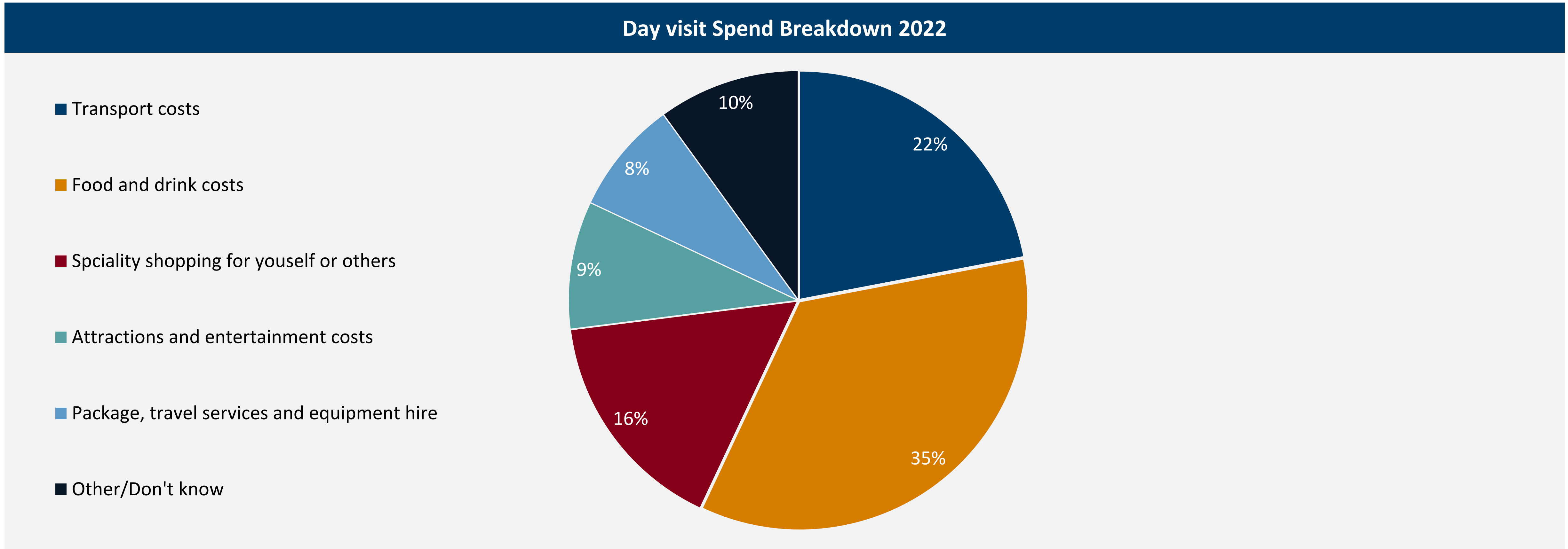
* Base size is between 30 and 100, it is recommended to only use the estimates as indicative. **Base sizes under 30 have been excluded.

Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022

Base: Wales 1,035

Day visit spend breakdown 2022

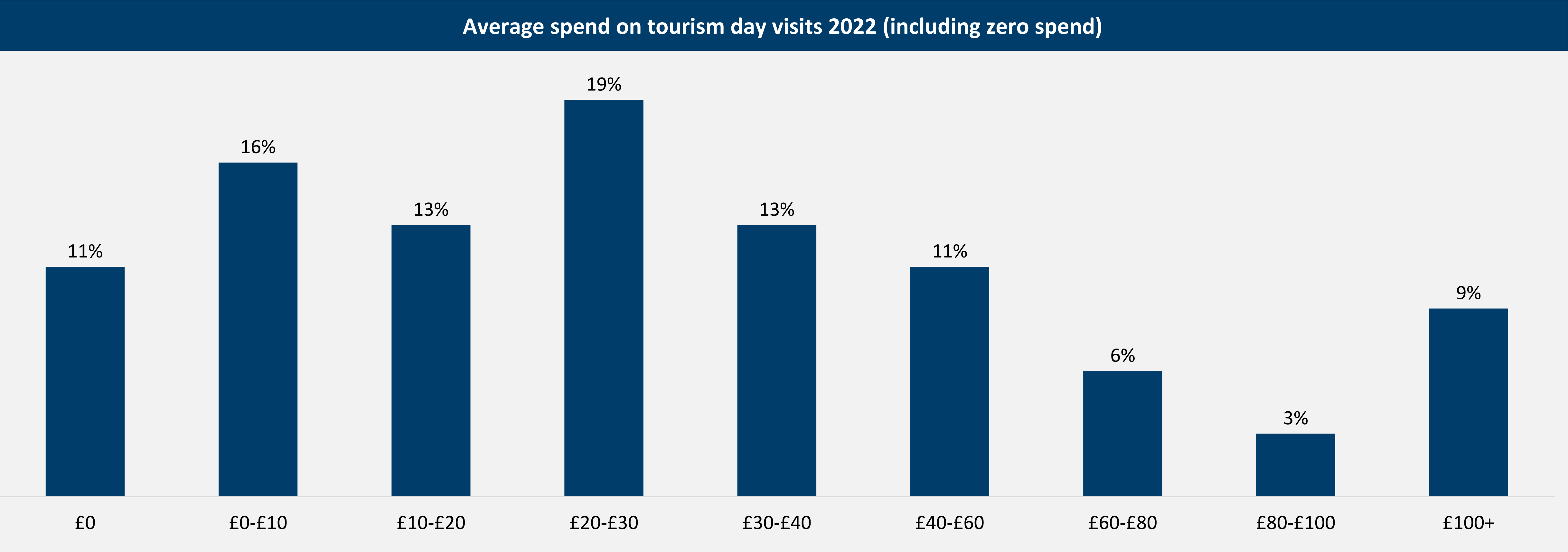
Most day visit spend is used for transport, food and drink and speciality shopping. In 2022, the proportion of spend on rail transport declined by 3 percentage points, in line with the decrease in use. When compared to 2021, there was a drop in the proportion of spend on speciality shopping (-7pp), which was replaced by attractions and entertainment (+3pp) and fuel costs (+3pp).



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035

Average spend on tourism day visits

Average spend on the majority of tourism day visits was £40 or less. 1 in 10 spent nothing at all, these day visits were mostly to see friends and relatives. However, 9% did have an average spend of more than £100 per visit. These visits were more likely to be to cities and large towns, made up of 55-64 year olds and taking part in activities such as food, drink, a night out or speciality shopping.



Source: Great Britain Tourism Day Visit Survey (GBDVS) 2022
Base: Wales 1,035