

Wales Visitor Survey 2019

Qualitative Research Findings



Llywodraeth Cymru
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Exploring the Wales visitor experience: qualitative research findings (Wales visitor research Phase 3)

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1. Situation, research objectives and method

1.1 The need for the research

In 2019, Visit Wales commissioned Beaufort Research to deliver a large-scale quantitative visitor survey to update findings from 2016 and track any changes in profile, attitudes and satisfaction of visitors. The results from this research will be used to provide benchmarks for Visit Wales' development and marketing strategies. Visit Wales has developed a new Tourism Plan¹. The findings from the 2019 Visitor Survey are therefore an important element to inform the implementation of this plan.

The quantitative survey was conducted in two phases: Phase 1 consists of face-to-face interviews with visitors at a range of locations throughout Wales. They were then invited to take part in Phase 2 which was a phone survey to follow-up on the trip.

Phase 3 of the research consisted of exploratory qualitative research with holiday makers in Wales. Its aim was to add richness to the quantitative survey with examples of experiences and to ensure the visitor's voice is heard in more depth, alongside the quantitative results from Phases 1 and 2. Phase 3 reveals why visitors feel the way they do about aspects of their visit and provides examples of individual experiences in more detail. It is not intended to measure satisfaction or perceptions in any of the areas covered in Phase 2 of the main survey.

This report is concerned with the qualitative findings from Phase 3 of the 2019 Wales visitor survey. The main report, for Phases 1 and 2, will be published in March 2021.

1.2 Research objectives

The overall aim of Phase 3 was to add richness to the quantitative survey findings. Specific objectives were to:

- Understand why staying visitors chose Wales;
- Gather examples of how the trip was planned including day-to-day activities;
- Identify Wales' perceived strengths and weaknesses;
- Explore perceptions of Welsh produce;
- Gather examples of the extent to which visitors remained in one location versus travelling more widely in Wales;
- Gather examples of visitors' spending while in Wales;
- Understand how the trip left participants feeling.

¹ See <https://gov.wales/tourism-strategy-partnership-growth> and also https://businesswales.gov.wales/tourism/sites/tourism/files/documents/Tourism-Action-Plan-2020-Short-Guide_A5_English_WEB.pdf

1.3 Research method and sample

A mix of approaches was used to interact with visitors to obtain as much in-depth feedback as possible. The first step was to recruit 40 staying visitors in several different locations across Wales during their trip. They were asked to keep a **diary** of their visit, covering what they did each day.

The second step was to invite the 40 visitors to take part in an **online forum** in early autumn, looking back on their experiences. This sample was topped up with participants from Phase 2 of the quantitative survey as some who were recruited to keep a diary did not complete one or chose not to progress to the forum. Participants posted on the forum's key topics over a number of days.

All participants lived outside Wales. The sample achieved contained a mix of:

- Visitors staying 2-3 days, 4-7 days and 8+ days in Wales;
- Couples, families and empty nesters;
- Types of visit (taking part in outdoor or sporting activities, attending an event / concert / performance / sporting event, enjoying the landscape / countryside / beach, visiting places / historical sites / religious sites / specific attractions / sightseeing);
- Different locations visited in Wales;
- Number of visits to Wales in the past.

The majority of participants were from England (North, Midlands, South East, South and South West). A small number were from overseas (Canada, Germany, Italy and the Netherlands). The total fieldwork period for Phase 3 was late July to October 2019.

The analysis was informed by participants' returned diaries, participants' online forum posts and the follow-up phone interview conversations. An inductive approach to the analysis was used whereby the researchers categorised the data to develop themes. The categories and themes were broadly framed within the key research objectives. In addition, the diaries' content was transferred into an Excel file to aid this element of the analysis. Photos are used within the report to support the themes identified in the analysis.

The report includes verbatim comments from participants' posts in the online forum and diary entries. These comments are presented as they were posted but revisions have occasionally been made where a typing error affected sense. Each comment has an attribution which covers lifestage, where they mainly visited in Wales, where they are from and how many days they spent in Wales, for example: (*Empty nester, South/South West /Mid/North Wales, Midlands, 14 days in Wales*). Participants sometimes posted links to sources of information some of which are included in verbatim comments.

The report also contains photos taken by participants while they were visiting Wales. Permission has been obtained for their photos to be used in this way.

2. Reasons for choosing Wales as a holiday destination

2.1 Overview

A wide range of factors emerged spontaneously that contributed to participants' decision to visit Wales. It was often a combination of factors that led to Wales being chosen. The main themes are highlighted below, with Wales' natural environment and scenery prominent themes.



Several of these themes were also identified as Wales' strengths, in particular its natural environment and scenery, its historical buildings, the variety on offer in Wales and proximity to where the participant lived. Strengths are covered in section 4.

2.2 Examples of reasons for choosing Wales

Connection with Wales

Some participants **already had a connection** with Wales which contributed to their decision to visit in 2019. There were instances where parents had fond **childhood memories** of trips to Wales: 'wide, sandy beaches, mountains, greenery, animals, rock-pooling, castles, mines, rain and sunshine' as one participant recalled. They wanted to give their own children similar experiences and pass on their love of Wales or a specific part of Wales. There was also reference to wanting to introduce a partner to a part of Wales that was particularly liked. Some had **family connections**, for example a parent or grandparent from Wales or had even lived or studied in Wales for a time.

“ I decided on Pembrokeshire from the holiday experiences I had there as a child. I felt it would be a great destination for my family. . . . I went to Saundersfoot regularly as a child and chose it as a place for my young family 7 years ago. (Family, children, Pembrokeshire, Midlands, 8+ days in Wales)

My father's family home was just outside Swansea and I remember many family holidays in Wales as a child. . . . For this trip nowhere else was considered. The initial drive for the trip was to revisit my father's childhood home area near Swansea, which had many happy memories for me. (Empty nester, South/South West/Mid/North Wales, Midlands, 8+ days in Wales)

My partner had never been to Wales so I wanted to show him what he was missing out on. He has since fallen in love with Pembrokeshire! (Couple, Pembrokeshire, Midlands, 4-7 days in Wales) ””

In other cases, a connection with Wales had developed over time with **habitual** trips. It was almost a given that they would visit. In one example, a family had formed friendships with other holidaymakers at the same holiday park over the years to the extent that they co-ordinated their visits each year. Another participant visited Mid Wales a couple of times a year with his motorbike club because of the quality of the roads and scenery.

Specific activity, event / 'bucket list'

The attraction of a specific **activity or event** had motivated some participants to visit Wales, with certain challenges having been on a bucket list for a while. These included wanting to climb Snowdon or take the Mountain Railway to the summit, experience Zip World, explore the Brecon Beacons, sea kayak, visit a mountain biking park, attend a concert, attend an international football match, celebrate a milestone birthday with a short stay and fine dining; and support a son taking part in a historical re-enactment event.

““ *The primary reason we came to Wales was to take in the Man U vs AC Milan match at the Principality Stadium. Our son is a huge fan and as a graduation gift he received tickets to the match. (Family, adult son, South East Wales/Pembrokeshire, USA, 2-3 days in Wales)*

It was the main reason we were visiting Snowdonia - velocity 2. . . . I wanted to visit Snowdon and experience the zip wire. With a fear of heights; this was me trying to challenge myself and conquer the fear! (Empty nester, North West Wales, Midlands, 8+ days in Wales) ””

Advertising, media, recommendation

Key motivations for some participants were encountering **advertising, media content** about Wales and **recommendations**, all of which had sparked their interest in a visit. In one case, a participant had spotted a timely ad on Facebook for a relaxing, peaceful break in forest based accommodation. She had been feeling stressed at the time and so had been very receptive to the ad. It was completely different to their usual breaks which centred on the seaside and amusements.

““ *The photos that was advertised caught my eye. After a stressful year, I seen this sponsor which simply said, to get away from everyday life, tranquillity, the fact they had a hot tub and had big enough accommodation for my big family. (Family, children, Mid Wales, Midlands, 4-7 days in Wales) ””*

TV programmes had alerted some to Wales as a holiday destination, particularly among overseas visitors. Rick Steves' European tours covering Wales and Steve Pritchard on the Discovery Channel had caught a couple of participants' attention while 'travel reports' on German TV had attracted another. The BBC's Great British Menu TV series and an ITV documentary on the Menai Straits had prompted a couple of UK based visitors to consider Wales.

“ I have to say that some of what inspired me to go back to Wales and to north Wales [earlier in the year], were some programs on television, like one on the Menai Strait and peoples daily lives around the tourist season. I had never really considered Wales a summer destination, but that and actually doing this survey have taught me more. (Friends, South East Wales, South East England, 2-3 days in Wales)

We like to watch Rick Steves European Tours on PBS TV - and use his tour guides: <https://www.ricksteves.com/watch-read-listen/video/tv-show/north-wales-feisty-and-poetic> (Couple, North West Wales, Germany, 4-7 days in Wales) ”

Family members and friends had proved persuasive advocates according to some participants. These included recommendations for the areas of Llanberis, the Wye Valley and Pembrokeshire. One US visitor had heard very positive impressions of guided tours to Wales from the US (as part of a European tour) from friends. They were further engaged by online content about the tour.

“ Our interest in visiting Wales came from watching online posts of earlier [name] Tours Trips on his Facebook page since he started his tour business a few years ago [in the USA]. The pictures were amazing and friends of ours who went on his tours had great things to say about them. (Empty nester, North West Wales, USA, 4-7 days in Wales) ”

3. Wales' strengths and weaknesses as a holiday destination

3.1 Overview

The table below summarises Wales' strengths and weaknesses. Those in bold sometimes felt **distinctive** to Wales versus other UK holiday destinations. No significant weaknesses or issues were identified.

Wales' strengths	Wales' weaknesses (note no significant themes)
The natural environment and scenery	Very busy in certain places / parking
Peacefulness	The price of certain attractions
Quality time with family	Occasional disappointing experiences at attractions
History	Welsh food and drink not very prominent
The Welsh language	
Unplanned experiences and discoveries	
A proud nation, friendly people	
Certain attractions / activities	
The variety on offer	
Easy to reach Wales	

3.2 Strengths associated with Wales

Several of Wales' strengths were factors that contributed to participants' motivations to choose Wales for a staying trip in 2019. One factor in particular, **Wales' natural environment and scenery**, was a common thread across: motivations to visit; strengths; and sometimes distinctiveness of Wales. Participants shared many photos of the landscape and views that significantly contributed to their enjoyment of the trip, illustrated overleaf. They referred to the coastline (seen from land and sea), beaches, mountains and countryside. Some identified the variety of scenery in Wales as a further strength. 'Beautiful', 'stunning', 'breath-taking', 'mind-blowing', 'awe inspiring', 'amazing' and 'unspoiled' were all used to describe Wales' scenery.

One of the reasons we chose Wales (in particular Pembrokeshire), was to explore the many, beautiful, sandy, quiet beaches and coves with all of the family, including the dog!

The beach photo is of Aberystwyth beach, quiet and peaceful and very clean. Wales has such beautiful scenery and has some of the best beaches! Aberystwyth was a surprise find, having been to the Gower area before.

No matter where we walked, one of us would make a comment on how beautiful the landscape is.

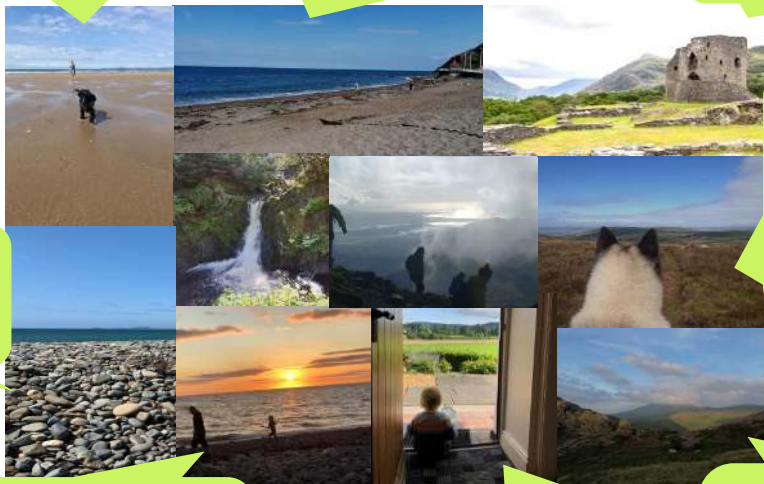
Beautiful, unspoilt, breath-taking.

I think mainly just the open roads and the beautiful scenery as you're travelling around. You don't really see anything like that anywhere else in the UK.

A small girl carrying a feather she found on the shore, trailing behind her father, silhouetted by a dramatic sunset.

Relaxing, the view out of our cottage enjoyed by all ages.

Scenery was what we didn't think anywhere else could offer. . . . The countryside was just incredible. We were blown away everywhere we went.



With Wales' impressive landscape came, for some participants, a sense of **peacefulness**. The visit gave them a chance to pause, put to one side and escape from the daily pressures of life. Peaceful and beautiful surroundings enhanced **quality time with the family** or friends in their party. This experience felt quite distinct to Wales, reflected some participants. It seemed quieter, more unspoiled and uncrowded than other UK trips (for example to Cornwall or the Lake District). Wales' landscape had the ability to deliver moments to 'cherish' during the trip, summed up some visitors.

“ Wales for me represents a return to a simpler, unspoiled and traditional way of life. . . Back to nature. (Family, children, South West/Mid/North West Wales, South West England, 8+ days in Wales)

Wales is lovely. It felt unspoilt and local. Somewhere I would like to bring my daughter again. (Family, children, Pembrokeshire, East England, 4-7 days in Wales)

The roads (for biking on), the scenery and the lack of crowds is always a big draw. (Empty nester, Mid Wales, South East England, 4-7 days in Wales)

I find it is more about simple but powerful moments that I will cherish and always remember. . . . Wales was filled with incredible moments for me and my daughter. The first day we were driving high up in the hills of the rolling farmland near Cardigan in our camper van and, while I am not very religious, I turned to my daughter and said I felt we were as close to heaven as we could possibly be. (Empty nester, Mid/North West Wales, USA, 4-7 days in Wales)



This picture portrays the light heartedness, optimism, and ability to cherish the moment. The rural areas in Wales compelled to put the phone away, shut off the laptop and fully engage in the beauty of the moment. Thus, with this picture I wish to convey the idea, that Wales allows us to escape from the hustle and bustle of the town and transcend into a state of inner peace. (Couple, North West Wales, Germany, 4-7 days in Wales)

It's a beautiful, unspoilt, sandy beach with fantastic views of Borth and the cliff to the left and Aber Dovey to the right. It's dog friendly all year round and is pretty quiet compared to Borth. We love it. (Family, children, Mid Wales, North England, 8+ days in Wales) ”



A further strength some participants associated with the **landscape** was its **connection with history**. Where this was felt, it was also identified as an aspect unique to Wales, as well as adding to a sense of place. These factors spanned recent to ancient history. There were references to seeing disused, deteriorating heavy industry equipment and sites conveying a bygone era, wandering round Tintern Abbey envisaging life there and walking an ancient Roman road in Snowdonia.

“ *The landscape is incredible. We found that the history, geography and geology of the country are so tightly woven that they all tell a story. There are many castles overlooking the countryside; monumental sites and abbeys weather worn and beaten; disused slate quarries opened up to and flooded by the sea; and once-working mines and pits made into museums. It's a special place. (Family, children, South East Wales/Pembrokeshire, South East England, 8+ days in Wales)*

In going to Wales we were excited to hike through some beautiful natural areas amidst stories of times long ago. We also enjoyed learning a little of the culture and

more recent history and current issues of Wales. (Empty nester, North West Wales, USA, 4-7 days in Wales)

The geographical structure and diversity of the undulating hills contrasting to the starkness of the slate quarries gave one a sense of local history. Amazingly, we found the latter to be quite beautiful. (Empty nester, North/North West Wales, South England, 2-3 days in Wales) ””



Wales' **history**, therefore, was considered a major strength and a motivation for some to visit. Some believed that it contributed to the uniqueness of Wales, given the number of historical sites, especially castles, in a reasonably small area. The way in which some museums helped to give visitors insight into past ways of life was appreciated. Amgueddfa Cymru Cardiff, St Fagan's and Ceredigion Museum were highlighted as examples of how effectively the past had been brought to life.

Historical sites had also provided memorable moments in their holiday for some participants: the interpretation at Cardiff Castle and visiting Caernarfon, Castell y Bere, Chepstow and Powis castles.

““ *Also has a rich and interesting history, the best example is their castles. . . . The castles that are still in such good condition that tell a thousand stories [are uniquely Welsh]. (Couple, North West Wales, North England, 2-3 days in Wales)*

Even though we went with an intention of seaside leisure the part that stood up for me the most was Cardiff Castle. The voice guide and amazing structure with interesting history made me remember this place very well. (Couple, Vale of Glamorgan, Midlands, 4-7 days in Wales)

Ceredigion Museum was a celebration of Welsh life there - I loved the Welsh costume photos! (Family, children, Mid Wales, South England, 4-7 days in Wales)

A new discovery this year, after seeing it on an obscure TV programme that interviewed Robert Plant. They shot some of it from Castell y Bere and we realised it was near to where we stay. It did not disappoint. Although it's only castle ruins, there is such a lot there. The views are beautiful too. (Family, children, Mid Wales, North England, 8+ days in Wales) ””

An overseas participant with a rental car pointed out that it had sometimes been a little difficult to follow the signs while driving. However, he felt it added to the authenticity of the trip and would not want it changed.

The use of the Welsh language, seeing the Welsh flag and interactions with locals gave some participants the impression that Wales was a **proud nation**; and this phenomenon had not been noted by some on other UK trips.

“ *The scenery is beautiful; on par with the Lake District and Northumberland, but there they don't have a language or the deep affiliation with their history. (Empty nester, North West Wales/Pembrokeshire, Midlands, 8+ days in Wales)*

We also got the strong sense of local history and the Welsh people being very proud of their nation. (Family, children, Mid Wales, South England, 4-7 days in Wales) ”

Unplanned experiences and discoveries during participants' visits further enhanced the overall positive perceptions of Wales. These sometimes minor but memorable moments made a lasting impression on some. More generally, some participants who were past visitors to the country commented how they had re-discovered Wales on the trip and been reminded of what an attractive place it is to visit. Examples of the unplanned, memorable moments included:

- Getting lost while driving and stumbling upon a memorable experience (e.g. a participant finding themselves outside Chepstow Castle by accident, deciding to visit and finding it fascinating; and turning down a dead-end to find a field of sheep which the US participant was able to pat);
- Encountering a medieval re-enactment at a castle;
- Coming across a local tug-of-war competition;
- Spotting a small brewery, stopping and being on a tour;
- Being shown an impressive church carving;
- Stumbling across Cardiff Market resulting in several unintended purchases;
- Seeing a coasteering party and deciding to give it a go;
- Seeing seals close-up while sea kayaking;
- Discovering Bosherton lily ponds;
- Being surprised by the 'hidden beauty' on a Brecon Beacons walk;
- Beachcombing and finding 'treasure' like smoothed glass and interesting stones;
- Discovering a lovely town (Llandudno, Llangollen);
- Discovering a cycle trail which turned out to be a real adventure for the children.



“ We accidentally visited Chepstow Castle, after missing a turning and then going with the flow, but I’m so glad we did! (Family, children, South East Wales/Pembrokeshire, South East England, 8+ days in Wales)

The ticketing people at Raglan were very helpful in planning our day and organising our Cadw membership. . . . It turned out to be a great, unplanned day. It was fascinating to encounter at Raglan a medieval re-enactment. (Family, adult son, South East Wales/Pembrokeshire, USA, 2-3 days in Wales)

We just stumbled across [a trail] by asking locals once on the bikes. We managed to find a beautiful flat route through some woods which was great for the children but also found a lovely track down to the beach where my 5 year old experienced his first bit of proper off road cycling and loved the bumps and fast downhill. (Family, children, South Pembrokeshire, South England, 4-7 days in Wales) ”

Participants’ holiday **highlights** overall reflected Wales’ strengths, its perceived uniqueness and sometimes the unplanned experiences described above. They can be broadly grouped into four themes:

- **Landscape** related: for example enjoying the landscape during a walk (Snowdon, Brecon Beacons, Coastal Path, Solva), on a picnic by the River Wye, while driving, while on a steam train journey, while relaxing on the beach, while swimming in the sea and looking back at Tenby from the beach;

“ Having our picnic on the River Wye sitting on a big flat rock warmed by the sun and watching canoeists going over the rapids. (Empty nester, South East Wales, Midlands, 4-7 days in Wales)



I think my highlight was exploring the coast from a sea kayak, although I think my children would say the coastering and my husband would say the beaches! (Family, children, South East Wales/Pembrokeshire, South East England, 8+ days in Wales)

For me definitely the scenic trip on the steam railway from Aberystwyth to Devils Bridge. (Family, children, Mid Wales, South West England, 8+ days in Wales)

I agree about the beautiful Welsh scenery- driving along tiny winding roads, looking across fields to the mountains of mid Wales all in glorious sunshine can't be beaten! (Family, children, Mid Wales, South England, 4-7 days in Wales) ”

- **Attractions / activity highlights:** for example during an adventure (zip wire, sea kayaking, coastering), visiting historical buildings / museums (Caernarfon Cardiff, Chepstow and Powis castles, Tintern Abbey and St Fagan's) and visiting National Botanic Gardens, King Arthur's Labyrinth and Talacre Lighthouse;

“ Obviously the zip wire experience [was the highlight], which was our main reason for visiting the area but we had forgotten how beautiful Wales is and for that reason alone, we shall be back for longer, next year. (Empty nester, North Wales, South England, 2-3 days in Wales)

Difficult to pick out a single highlight as the whole trip was just great. If I had to pick one, would probably be Powis Castle closely followed by Mwnt Bay. . . . The castle itself is stunning, but adding the tiered gardens and the views, it takes your breath away. (Empty nester, South/South West/Mid/North Wales, Midlands, 8+ days in Wales)

The highlight for us was going into a disused lead mine as part of an activity called King Arthur's Labyrinth just on the edge of Snowdonia where you're taken on a boat in the cave, through a 'magical' waterfall by a mystical boatman! As we entered each cavern, a story of King Arthur and Welsh legends were told. It was a really fun, quirky adventure! (Family, children, Mid Wales, South England, 4-7 days in Wales) ”

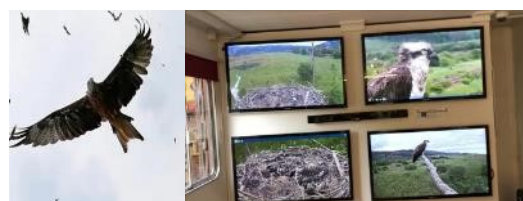


- **Taking time:** being able to take time to pause and relax in contrast to normal daily routines was a highlight for some; and having quality time and moments with family and friends;

“ Being in a country that is half of my heritage with my brother (over from New Zealand) and my best mates were also fantastic. (Friends, South East Wales, South East England, 2-3 days in Wales)

It might be the beaches, the castles, the laughter on the way to Worm's Head when we got lost (local councils seem to either work on a lots of signs or no signs at all policy) or the evening we were forced to spend in a restaurant eating lovely food and drinking cocktails to avoid the very heavy and prolonged storm and rain. (Empty nester, South East Wales/Gower, North England, 4-7 days in Wales) ”

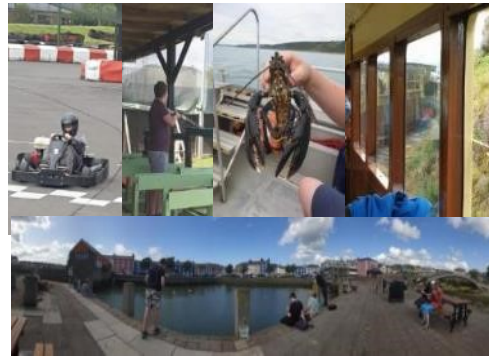
- **Wildlife:** these holiday highlights included encounters with red kites and ospreys, seals and spotting dolphins. There had been occasions where participants with an interest in wildlife had not realised what was on offer in Wales.



“ Our highlight of our holiday had to be the red kite feeding station. The birds were beautiful, as hundreds swooped down at feeding time...for a good hour the kids were mesmerised. Couldn't believe how close we were to them. It was amazing to see them and to see how big they actually were. (Family, children, Mid Wales, Midlands, 4-7 days in Wales)

The beautiful estuary walk and the birdlife on the coast at Ynsylas coupled with the awesome weather made for a really lovely day. (Empty nester, Mid Wales, Midlands, 4-7 days in Wales) ”

The range of strengths and highlights outlined above illustrates the further perceived strength of the **variety on offer** in Wales regarding its landscape and things to do. There was believed to be 'something for everyone'. It had been a determining factor for one extended family visit as all party members could be catered for. The variety also kept some participants returning to Wales on a regular basis as there would be something different to discover on each visit.



“ Having travelled a little around the world, there is nowhere better than the UK for beautiful landscapes, historical buildings and culture. This particularly applies to Wales. (Empty Nester, South/South West/Mid/North Wales, Midlands, 8+ days in Wales)

I love Wales as a destination. Whether I go to go walking, to visit historic places, galleries and museums or for the beautiful countryside and coast. There is something different for whatever mood you are in. (Empty Nester, South East Wales, Midlands, 4-7 days in Wales) ”

A final point to note on Wales' perceived strengths, according to some participants, was how **friendly** people in Wales were. They were thought to take pride in their country and to be keen to help visitors when needed.

3.3 Impact on wellbeing

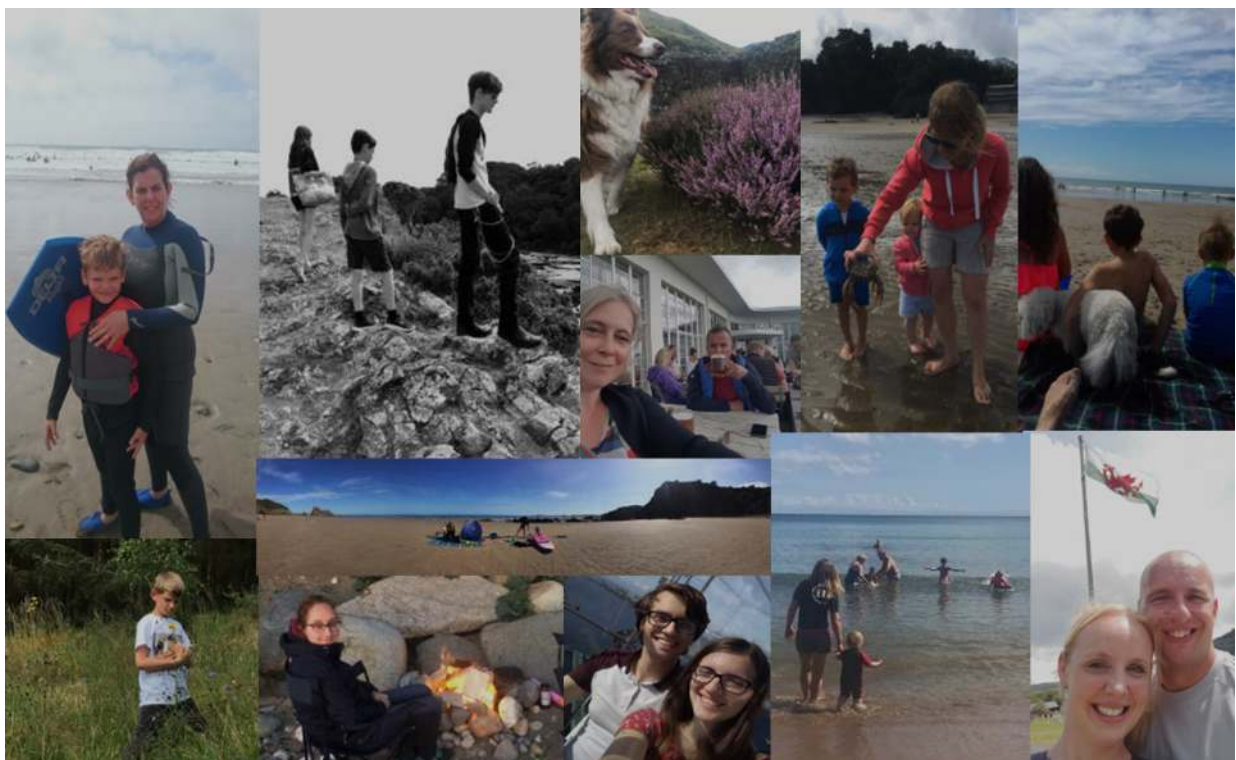
Taking into account the positive aspects of the trip described above, participants concluded that their holiday in Wales had a positive impact on their wellbeing. The trip had been relaxing in particular. Those who felt stressed from work and day to day life felt some relief from this pressure.

Some participants commented how the trip had left them feeling closer as a family as they had spent more enjoyable time than usual interacting with one another. This included when out and about together as well as in their accommodation, for example playing board games rather than being preoccupied with screen time.

“ Definitely more relaxed and happier. Living life for a week without the phone ringing constantly, no teenagers constantly glued to their phones using WiFi, we had the whole family together, just us with no neighbours, away from roads, just away from everyday life. We could sit outside and eat breakfast and just listen to the running streams, or sit in the hot tub as the sun goes down until late. (Family, children, Mid Wales, Midlands, 4-7 days in Wales)

Both me and my partner came back from this trip feeling so relaxed . . . It was amazing to get away just the two of us as we both have quite busy jobs so don't get to see each other as much as we would like. But this definitely made us appreciate our time with each other. (Couple, Pembrokeshire, Midlands, 4-7 days in Wales)

We were a big family group that went and I loved being able to spend time with my niece and nephew making memories! (Couple with relatives, Mid Wales, South East England, 4-7 days in Wales) ”



Examples of participants' wellbeing related photos

Further benefits to wellbeing described by participants covered feeling refreshed, re-energised and re-invigorated, healthier and happier, rewarded and inspired.

“ My holiday has left me feeling re-energised and relaxed. I feel I've been on a journey, seen some amazing views, felt the forces of nature on my skin, met some genuinely friendly people who are interested in me and providing outstanding service and feel I've

connected with the landscape. (Family, children, South West/Mid/North West Wales, South West England, 8+ days in Wales)

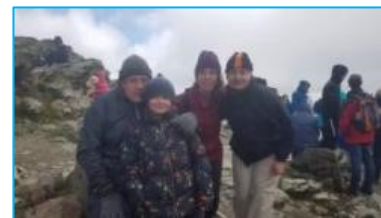
Both me and my girlfriend felt like we recharged our batteries and had a good quality time. This trip felt inspiring for us as to how we like spending our free time :) (Couple, Vale of Glamorgan, Midlands, 4-7 days in Wales) ””

3.4 Perceived weaknesses of Wales as a holiday destination

Participants often **struggled to highlight any prominent negative aspects** to their visits. There was widespread desire to return. The following points should therefore bear this finding in mind.

On a few occasions, participants had found certain locations **very busy** and sometimes struggled with **parking**. These were in Pembrokeshire (Tenby, Saundersfoot, St David's), on Snowdon (the summit café with queues meaning there was no time to use it, the Mountain Railway being fully booked months in advance) and the Aberystwyth Cliff Railway. However, participants sometimes felt that this was to be expected as they were visiting during peak season.

“ It was chaos at the [Snowdon] terminal/café and we found the half an hour turnaround was not really long enough after having a wee and our friends had to queue to get their picture taken at the summit. (Couple and relatives, North West Wales, East England, 4-7 days in Wales)



Some of the car parks at certain locations got busy very early which meant we had to alter our plans a little. I suppose everyone had the same idea! . . . Ogwen car park, walking to Llyn Idwal (which was beautiful even in the rain) although there were overflow car parks nearby so it wasn't as bad as others. Pen-y-Pass car park was another one as we really wanted to visit Llyn Llydaw but the car park was full early and the overflow car parks were quite far away. (Family, children, North West Wales, South East England, 4-7 days in Wales)

There was definitely overcrowding and lack of parking in Tenby. It was so bad that we ended up having to cancel the trip there. My dad has an issue with his leg which means he can't walk very long distances. The carpark in Tenby was too far away from the seafront so we couldn't go there. Parking was quite a big issue wherever we went. (Couple with relatives, Mid Wales, South East Wales, 4-7 days in Wales) ””

A second issue occasionally raised was the **price** of certain attractions. This was sometimes compounded by a disappointing experience.

“ The only thing that shocked us a little was the entrance fee [to the attraction]. Not realising they don't do a family ticket and paying on the gate put a hole in our wallets. The [attraction] wasn't as big as we thought it would of been, and they could

of done with some more picnic tables. (Family, children, Mid Wales, Midlands, 4-7 days in Wales)

Sometimes puzzled by high entrance fees. . . . £10 park near Mount Snowdon . . . (Family, North West Wales/Pembrokeshire, Netherlands, 8+ days in Wales)

No downside apart from [an attraction]. . . . Prices in there were a joke but Rhyl was lovely. . . . My partner had seen it advertised on Facebook I think so we decided to incorporate it into the trip. . . . On the whole good however not worth the price of the tickets for us. (Empty nester, North Wales, East England, 2-3 days in Wales) ”

A further price related gripe for a couple of parents was having to pay up to 40 pence to use public toilets especially when a young child was desperate to use the facility. The cost of parking in a few instances was a slight issue as well.

A small number of other disappointments or gripes emerged:

- **Elan Valley** – one family had been disappointed by the reservoirs, expecting there to be a spectacular overflow cascading down the wall of the dam. The lack of rain meant that this was not the case. Even when they returned after some heavy rainfall, they subsequently found out that it would take a number of weeks of rain for the water to flow over the dam wall. Another family visiting the Elan Valley had been disappointed after a long drive that there did not seem to be any obvious walking routes to follow. Finding things to do in Mid Wales had been a challenge for a couple of families (including in wet weather) or at least activities that did not involve a long drive;



“ *We were just disappointed with the Elan Valley, when looking at it online, you are drawn to the big dams which looked amazing, but as the weather was nice they were all empty. (Family, children, Mid Wales, Midlands, 4-7 days in Wales)*

It took about 1.5 hours to get there [Elan Valley], which is a bit further than we'd normally travel with kids and dogs, etc. Although it was very scenic, we were disappointed that there were no proper waymarked walks. We didn't really know where to go, so it felt a bit of a waste of time. (Family, children, Mid Wales, North England, 8+ days in Wales) ”

- **Accommodation** related issues: customer service in an expensive hotel had been lacking for one overseas participant; a couple of hotels had not felt up to scratch; a family staying in a caravan park had to contend with bed bugs; and failing to realise that a cottage booked online was on a very busy road – this German participant had been seeking a peaceful spot;

“ *We were underwhelmed by our accommodation in Crickhowell. . . . It was definitely a step down compared to other accommodations but it had been difficult to find something better with availability online before we left. It was OK but breakfast*

ended early, spiders in the bathroom etc. (Family, adult son, South East Wales/Pembrokeshire, USA, 2-3 days in Wales)

The only down side was the accommodation, it has put me off staying in a pet friendly accommodation the smell was awful & very run down. I know it was never going to be 5 star but it could of least been cleaned better. . . . The accommodation was horrible. . . . It had bed bugs. (Family, children, North/North West Wales, North England, 4-7 days in Wales) ””

- Finding that **Cardiff**, including the Bay, felt quite ‘commercial’ and ‘generic’. According to one participant there was little that was distinctive about the city from what she saw during a short break to attend a concert;

““ *Encourage and promote Wales, restaurants, crafts and the history of course. Sometimes struggled, could have been anywhere in the UK. (Couple, Cardiff, Scotland, 2-3 days in Wales) ””*

- Finding that places seemed to **close quite early** despite long summer evenings. This Italian participant was based in Cardiff;
- Booking a hotel in Colwyn Bay (as part of a trip to the zip wire) in what felt like a **slightly run-down location**;
- Not feeling especially targeted as a **young couple**. This participant concluded that Wales was more geared towards families and older people.

““ *I think it would also be great to have more tourist attractions/things in Wales for young adults as sometimes it feels like Welsh tourism is targeted a lot at families with small children or the older generation. As a young person I love Wales for the coastal element and how relaxing it can be, but I know from speaking to other young people that it isn’t seen as necessarily a hot destination choice. . . . Often me and my friends are on the lookout for quirky things like junkyard golf. (Couple with family, Mid Wales, South East England, 4-7 days in Wales) ””*

3.5 Perceptions of Welsh produce

Mixed perceptions and experiences emerged of Welsh food and drink. For some participants, being able to sample local food and drink enhances a holiday experience. The perceived benefits included getting to know the local culture better, better taste, supporting the local economy and lowering the carbon footprint of the food. However, participants making these points tended not have made a great effort to seek out any Welsh produce when in Wales.

“ It’s lovely to be able to eat locally produced food. It always tastes great doesn’t it and it feels good to support the local economy and not add to global warming by eating food produced abroad. (Empty nester, North West Wales/Pembrokeshire, Midlands, 8+ days in Wales)

Buying local food is a treat wherever we go in the UK - our stay in Suffolk in May was made extra special by a welcome hamper in the cottage. The items, such as apple juice, two small bottles of beer, biscuits and organic milk, were all from the local area. We ended up buying more to bring back home with us. (Empty nester, South East Wales, Midlands, 4-7 days in Wales)

We feel that local produce shows you are proud of your area. It also makes the experience a bit more unique and special than eating what you would have in any other part of the country. (Couple, Pembrokeshire, Midlands, 2-3 days in Wales) ”

For others, however, local produce was not very important. Some were more concerned with value for money and had been content, for example, with the pub or fast food they purchased. Also, they tended to eat in their accommodation and it was not so much of a consideration when supermarket shopping. Further points made where Welsh food and drink was not so important included how participants were more focused on making the most of their short break and activities rather than eating; not expecting there to be much on offer for vegans; and believing that displaying an interest in local produce was for ‘posh eaters’.

“ We go self catering but we do eat out at pubs - mostly on the beach. The food was OK, it’s not something that drives us really. (Family, children, Pembrokeshire, East England, 4-7 days in Wales)

We went to local pubs. . . . The fact that it was Welsh produce or not did not really form part of our decision - it’s more about value for money and nice food. (Family, children, Mid Wales, North England, 8+ days in Wales) ”

Regarding saliency, Welsh provenance was considered by some to be more prominent in supermarkets than in restaurants and food outlets. The notable exception was the ubiquitous Welsh cake. Individual examples given of noticing Welsh produce included:

- Seeing it promoted in a pub in Monmouth, a pub in Tregaron, and a café near New Quay;
- When eating at a Michelin starred restaurant;
- Eating Oggies pasties in St David’s;
- Eating delicious ‘Welsh pies’ in Llangollen;
- Making use of a local farm shop on a campsite, mainly for barbeques;
- Buying local potatoes from a farm (a ‘clean, fresh taste’);
- Sampling the ‘fabulous’ Welsh ice cream;
- Buying ‘excellent’ Welsh beer and whiskey.

“ I think the only real Welsh food I spotted was homemade Welsh cakes. (Family, children, North West Wales, South East England, 4-7 days in Wales)

It is important to have local Welsh food available. For me, eating locally produced meals is all part of the holiday experience - we didn't have a curry or burger all week 😊. . . . The quality was always to a high standard. (Empty nester, Mid Wales, South East England, 4-7 days in Wales)

Welsh beer is up there with the best in my opinion. I'm a keen home brewer and design my own recipes so coming from me that's high praise. We visited the Bluestone Brewery in the Preseli Hills - it was so interesting. (Family, children, South West/Mid/North West Wales, South West England, 8+ days in Wales)

We cooked for ourselves a lot of the time but treated ourselves with some Welsh Cakes and Bara Brith. We tried to buy local beer (which was lovely) and honey and noticed a lot of Welsh promoted foods in the supermarket, in cafés and gift shops. We always like to try local foods and we weren't disappointed. (Family, children, South East/South West Wales, South East England, 8+ days in Wales) ”



Examples of participants' food related photos

There was sometimes surprise that Welsh produce had not been more prominent given the number of farms seen, for example. The overall food experience was believed to be similar to anywhere else in the UK and the food quite 'generic'. One participant had wanted to be able to find an online resource for 'foodies' with genuine, professional reviews of restaurants and food outlets. Another had been disappointed that there were no nice restaurants in the area where she was staying (Betws-y-Coed) to get dressed up for.

“ Good Welsh restaurants [in Cardiff] would have been nice or maybe we looked in the wrong places. (Couple, Cardiff, Scotland, 2-3 days in Wales)

We didn't really see many places promoting local food and I didn't see many artisan shops, which surprised us in a farming area. More and more places are promoting local produce and low food miles, but we didn't see much evidence of this in Wales. (Couple, Pembrokeshire, Midlands, 2-3 days in Wales)

In the beautiful Betws-y-Coed, where we stayed six nights, there seemed to be an awful lot of food outlets in proportion to other shops and the size of the place. I didn't fancy eating in any of them. . . . We did see local Welsh cakes advertised in a lot of places, but no other local cuisine. (Empty nester, North West Wales/Pembrokeshire, Midlands, 8+ days in Wales) ”

4. Planning the trip and spending while in Wales

4.1 Planning in advance of being in Wales

Participants tended to plan their trip up to approximately six months before the holiday (e.g. around Christmas or Easter). The types of holiday booked within this period varied from a nine day trip from Germany (around six months before) to a short break within a couple of months of the visit. At one end of the entire spectrum, a US family had begun planning their trip two years beforehand as part of an anniversary celebration. At the other end of the spectrum a UK family had begun planning their 11 day trip two to three weeks before visiting (in a campervan).

“ *We started to plan the trip after Christmas. We started to see the best opportunity to arrive in Wales. After Easter we booked the flights. (Family, adult daughter, Cardiff, Italy, 4-7 days in Wales)*

This trip was part of a long term plan to visit all areas of the UK. Started planning in January. Had a good idea of places we wanted to visit, but accommodation bookings did dictate this a little, as did budget. (Empty nester, South/South West/Mid/North Wales, Midlands, 8+ days in Wales)

There was a window of opportunity [6 weeks before] when we realised our childminding duties [as grandparents] were not needed for one week during the summer. (Empty nester, South East Wales, Midlands, 4-7 days in Wales) ”

When planning the trip, participants reported that, overall, they were able to find the information needed. **Google search** featured prominently as a source of information prior to being in Wales. It was mainly used to look for accommodation and things to do (e.g. spotting [Dayoutwithkids](#) in a search, Googling ‘Wye Valley cottages’ or ‘cottages/campsites in Wales’). Some used it to find specific attractions as part of the planning process (e.g. Chepstow Castle, Tintern Abbey or a particular restaurant). **Google Maps** was sometimes used at the planning stage to get an idea of what places looked like, travel distances and to see what there was to do in the area based on pinned content.

“ We Googled cottages/campsite in Wales. We found a lot that were already fully booked. One glamping site that I fell in love with didn't take children. Finally we found a last min deal on Sykes cottages. (Family, children, North West Wales, South East England, 4-7 days in Wales)

[With Google Maps] . . . I could look at what we could do while we were there by seeing what places of interest pop up on the map. For example, I clicked on Dolbadarn Castle and I could see pictures that people have taken when they have visited along with reviews which helped us decided if we wanted to visit there on our trip. (Couple, North West Wales, North England, 2-3 days in Wales)



Before we started our holidays we first think about in which region we want to stay. Then we search on Google maps and the internet site of the region/town which attractions are in the surroundings. And then we visit the internet sites of possible locations we probably want to see. (Empty nester, South Wales/Pembrokeshire, Germany, 8+ days in Wales) ”

TripAdvisor (sometimes used in conjunction with Google) was regularly mentioned as a useful source of information at the planning stage. Participants sought out hotels, restaurants and things to do, for example the pages [‘Things to Do in Llanberis’](#), [‘Things to Do in Wales’](#) and <https://www.tripadvisor.co.uk/Attractions-g186425-Activities-Wales.html>.

“ The most handy tool for us was TripAdvisor which showed us all the places worth checking out as well as restaurants based on reviews and dietary choices which we found very helpful. (Empty nester, South/South West/Mid/North Wales, Midlands, 8+ days in Wales)

Tripadvisor was useful, every [accommodation] review I read was positive, everything I read met my needs for me and my family. (Family, children, Mid Wales, Midlands, 4-7 days in Wales)

We found the hotel just by a Google search of ‘Hotels in Pembrokeshire’ and looked at Trip Advisor. (Couple, Pembrokeshire, Midlands, 2-3 days in Wales) ”

Specific accommodation sites proved useful as well. These included Sykes Cottages, Airbnb, a [Wales Online article](#) on campsites, the campsite website <https://www.pitchup.com>, [British Link Tours](#) (a German website), [Fodor's Guide to UK](#) (also used for things to do) and going straight to the Premier Inn website.

“ ... looked at a few websites specialising in Pembrokeshire holiday homes but ended up finding something on Airbnb as we were restricted by wanting a dog-friendly place and room for our family of five. (Family, children, South East Wales/Pembrokeshire, Surrey, 8+ days in Wales)

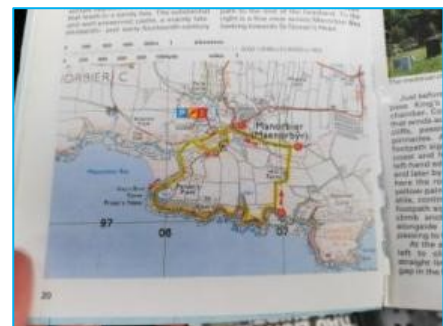
I knew I wanted to do the zip wire experience, so I went into their website and read the information and reviews. I then searched campsites for the area on <https://www.pitchup.com/campsites/Wales/North-Wales/>. There was a link from a campsite <https://www.morris-leisure.co.uk/> that affiliated them with caravanandcamping.co.uk. I'm a member, so I trusted the site was as stated. (Empty nester, North Wales/Pembrokeshire, Midlands, 8+ days in Wales) ””

Several **national and regional tourism websites** were explored as well and largely found to be helpful. These included Aberystwyth.org (which had not seemed very up to date for one participant), Go North Wales, Llanberis.com, Visit Cardiff, Visit Monmouthshire, Visit Pembrokeshire, Visit Snowdonia, Visit Wales and wydeantourism.

In some cases, participants had visited **membership sites** at the planning stage to help find things to do in Wales. Examples provided were Cadw, English Heritage, Historic Houses and National Trust. Some participants had wet weather options in mind with this part of their planning process in advance. Printed guide books from membership organisations were also used.

““ *I also bought a Cadw family membership, which not only saved us money on entry to some historic sites and places of interest, but made us search them out and gave us options for non-beach/activity days (usually guided by weather and whether we were travelling). (Family, children, South East/South West Wales, South East England, 8+ days in Wales) ””*

Other **printed media** had been helpful for some as well with advanced planning on possible things to do. References were made to using a Guide to Pembrokeshire, 'Fifty Great Sea Kayak Voyages' (Germany), The Week Junior magazine (which had recommended Devil's Bridge Waterfall), a road atlas and Ordnance Survey maps.



Finally, in a couple of instances, **social media** had played a role at the planning stage: viewing Facebook Events for Cardiff to see what would be on, seeing and responding to an accommodation ad on Facebook and bookmarking historical sites to visit in Wales in a Facebook group called British Medieval History.

There were exceptions where information had **not been so easy for participants find**. Some admitted that they wished they had started looking for **accommodation** earlier in the process so had found it harder to find a suitable place to stay. One or two compromises had therefore been made on aspects like location and proximity to a town or beach.

As described in section 4, finding **things to do when based in Mid Wales** had not always been that easy (e.g. within an hour's drive). A further point made by a small number of overseas participants was that it had been difficult to find appropriate **public transport information** when planning their holiday (visitors from Germany and Italy).

“ We would get excited about something and then as soon as we started planning routes we realised it was too far away. (Couple with relatives, Mid Wales, South East England, 4-7 days in Wales)

For buses [to St Fagan’s] it was better to go to the tourist office [than look online]. The drivers were very helpful. (Family, adult daughter, Cardiff, Italy, 4-7 days in Wales)

I found it especially hard to book train tickets online as there appear to be multitudinous website offering online tickets. (Couple, North Wales, Germany, 4-7 days in Wales) ”

Additional examples of difficulty finding information included the following:

- Not finding any kind of ‘guide for foodies’ covering Wales;
- Information on how to see a game of rugby (overseas visitor);
- Information on pushchair access for Snowdon Mountain Railway and walks;
- TripAdvisor food options in Pwelli included some closed down locations;
- What is worth visiting in Cardiff (overseas visitor).

4.2 Planning day to day activities during the trip

As the previous section shows, participants began thinking about what they would do on a day to day basis in advance of the trip. They tended to create a **list of possibilities** or at least one or two definite activities (for example booking sea kayaking) and then make final decisions on what to do each day while in Wales. The weather was singled out as a key determining factor for daily plans which meant final decisions could be **quite spontaneous**.

“ We planned our day trips based on the weather and what mood the children were in!! If they were tired then we would play on the beach and if they had energy we would go for a bike ride or something else active. On wet days we played at the caravan site for longer or went out for lunch. We looked at leaflets from the site. (Family, children, Pembrokeshire, South England, 4-7 days in Wales)

Leaving Cardiff was easy - stopped at St Fagans because had read about it in our guidebook. Interesting stop and kids enjoy history. Then drove to Southerndown for photography as requested by son who found recommendations for it as we were driving. Was terrific and even witnessed marriage proposal on cliffside. (Family, South East Wales/Pembrokeshire, USA, 2-3 days in Wales)

We had a rough plan of what we wanted to do whilst in Wales, having used websites and internet searches while back at home before we went. I had saved website links to my phone for easy access when we were away. . . . Then each day we were guided by the weather as to what we could do when, planning the day before what to do the next day. It would have been easier to plan each day if our wifi at the cottage was more reliable (and if the weather was more reliable too!) (Family, children, Mid Wales, South England, 4-7 days in Wales) ”

In a few cases, participants acknowledged that they made very few concrete plans beforehand. They felt that: the sources available while in Wales were sufficient; they knew the area or region well and that the trip had become an annual habit; they were not expecting to do anything that required much planning.

“ All of our planning was spontaneous. We used comments in the accommodation's guest book, and leaflets in the accommodation. It wasn't difficult at all, as there was a wide range of leaflets in the cottage. (Empty nester, Mid Wales, South East England, 4-7 days in Wales)

Me and my partner enjoy just chilling on the beach and walks which doesn't take much planning. (Couple, Pembrokeshire, Midlands, 4-7 days in Wales) ”

Online sources of information were key for planning while in Wales. Similar online sources were used to those covered in 5.1 but a number of other sources helped with decision-making as well. **Recommendations** were quite widely used and valued, for example from local people, staff at sites or in local shops, visitor comments books in the accommodation, tourist information centres and in one case a tour guide. Suggestions from locals in particular were felt to be authentic and trustworthy.

“ We really just googled best things to do in Wales and actually had a hard time culling the list of things. (Empty nester, adult daughter, Mid/North Wales, USA, 4-7 days in Wales)

Lovely lady in Wrexham Tesco recommended go to Llangollen. . . . I think getting recommendations from local people, not just business owners but the general public in the towns and villages. That's where we got our best advice from and it's just lovely hearing people talk with genuine love for their area. (Empty nester, North/North West Wales, East England, 2-3 days in Wales)

I always find Tourist Boards, hotel staff and museum and art gallery or CADW staff really knowledgeable. (Empty nester, South East Wales/Gower, North England, 4-7 days in Wales) ”

Some participants had used **leaflets** while in Wales, finding them a valuable source of information. In one example, a participant had asked her teenage son to pick out the activities he was interested in from the leaflets provided in the holiday park. The family had then chosen several attractions during their trip. A local newspaper, Pembrokeshire's Coast to Coast, had been helpful as well.



“ We didn't plan our activities until after we arrived at our accommodation. Our 15yr old collected leaflets from our on-site laundry, there was a huge range of info. He selected the ones he thought he/we would like to do. We all had input to agree. . . . All the leaflets contained all the info we needed i,e, website, contact details, satnav info, timetables, costs. . . . www.newquayboattrips.co.uk, www.heatherton.co.uk , Info@rheidolrail.co.uk. (Family, children, Mid Wales, South West England, 8+ days in Wales) ”

Additional sources of information while in Wales included seeing possibilities when out and about and using guide books.

From time to time, participants slightly regretted not having planned a little more effectively. This was based on seeing what other research participants had done on their holidays and having wasted precious time on some mornings deciding what to do that day.

“ We didn't do much planning at all before we got there. In hindsight, it may have been better to plan in advance as it meant we lost most mornings on the holiday to trying to decide what to do. (Couple with relatives, Mid Wales, South East England, 4-7 days in Wales) ”

4.3 The amount of travelling while staying in Wales

The small number of overseas visitors in the sample were more likely to have stayed in different places and travel further while in Wales than UK visitors. They wished to see as much as they could in the time available. There were no significant travel patterns when comparing length of stay, lifestage and UK home location. To illustrate this point, a US family spent two days in Wales and managed to visit Cardiff, Pembrokeshire, Aberaeron and Snowdonia. Similarly, a Dutch family on a three day trip fitted in Cardiff and Blaenau Ffestiniog. In contrast a UK family spent almost two weeks in a south Pembrokeshire location, visiting local spots, the furthest journey being 18 miles to reach a major supermarket. Some of the days were spent without using the car and visiting the local beach.



“ Wales was perfect to do something further away since we could see much of the country in a short time. We had hoped to see farm land and coastal beauty and we were not let down. Wales is the most beautiful and peaceful place we have ever been. (Empty nester, adult daughter, Mid/North Wales, USA, 4-7 days in Wales) ”

An example of travelling further afield, but staying in the same location, was a couple with extended family from South East England staying in Mid Wales. Based in Llandrindod Wells for seven days, they visited Aberystwyth, Rhayader and the Elan Valley, Shrewsbury, Tenby and the Brecon Beacons. The amount of travel became slightly ‘tiresome’ towards the end of the trip.

“ We travelled around quite a bit often driving at least an hour to places due to how remote it was where we were. This wasn’t too much of a problem but by the end of the week became a bit tiresome. (Couple with relatives, Mid Wales, South England, 4-7 days in Wales) ”

Otherwise, participants staying in the same place tended to explore the region they were staying in, sometimes fairly locally only (e.g. South Pembrokeshire and Snowdonia / Anglesey). Some days might be spent very locally / on site with trips slightly further afield on other days. Another example on the coast of Mid Wales saw a family spend approximately half of their two weeks staying local to the accommodation and the other days out on trips, the furthest being almost 30 miles away. In a couple of cases, participants commented that they wanted to use the car as little as possible either because it had been a long journey to Wales from another part of the UK or for environmental reasons.

“ By day we were on the beach and in the evening there was a mixture of dinner, a walk into town and board games at the house we were staying. Nice and relaxed. We did go to Folly Farm one day. . . . We wanted to park the car and not use it! We had travelled over 300 miles and chose to be in central Tenby to avoid needing the car. (Family, children, Pembrokeshire, East England, 4-7 days in Wales)

We left the site every day although some days it was just to walk down the steps to the beach. We went to Folly farm, various different beaches, a few bike rides, Tenby twice, played lots on the campsite, had barbecues. We certainly didn’t get bored. I would like to go for longer next time as there is so much to do and see. (Family, children, Pembrokeshire, South England, 4-7 days in Wales) ”

There were instances where participants stopped over in South East Wales on their way to South West Wales. Examples included stopping in Cardiff on the way to Pembrokeshire, having flown into Birmingham; stopping in Cardiff on the way to the Gower; and spending a night in the Valleys en route to Pembrokeshire.

4.4 Spending while in Wales



Travel and accommodation costs aside, participants normally identified food as their greatest outlay while on holiday in Wales. This covered purchasing food for self-catering accommodation as well as eating out. Looking at the reported spend of a couple participants, however, found that a similar amount was spent on activities and attractions as on food.

Participants tended to think that Wales seemed broadly comparable with other parts of the UK with the price of goods. They also felt that they spent more or less what they expected to, with one or two exceptions (a celebratory meal at a high-end restaurant and doing more activities than planned).

“ *Most of our money was spent on meals out. We used our NT, English Heritage, HHA and Art Fund membership to get into places. We always expect to spend money on holidays and Wales was no more expensive than other places (apart for maybe car parks?) (Couple, Pembrokeshire, Midlands, 2-3 days in Wales)*

We went to a Michelin starred restaurant one night [for a birthday], so that totally blew the budget. It was not a cheap holiday for us, but we chose the places we stayed, so that was on us. (Friends, South East Wales, South East England, 2-3 days in Wales) ”



Wales tended to be associated with value and sometimes a ‘budget’ trip. Some thought it offered better value when it came to accommodation, food and museum entry. Wales was felt by a small number to compare favourably with Cornwall, the Lake District and Norfolk. There was also plenty to do without spending much. Young families and young couples were, on occasion, more budget-minded. Self-catering participants often ate in their accommodation in the evenings because it was convenient, they were tired or to save money.

“ *We spent a week in Norfolk last year and Wales was definitely cheaper especially eating out; when it came to my fix of coffee and cake which is a daily habit when on holiday we found the cost reasonable. (Couple and relatives, North West Wales, East England, 4-7 days in Wales)*

We planned for this trip to be a budget trip where most of our money would be spent on food throughout the days we were there. The trip was not that expensive and we did not end up spending that much. Everything that we did was reasonably priced. (Couple, North Wales, North England, 2-3 days in Wales)

We kept costs down by eating at the holiday cottage in the evenings and making picnics for days out. Therefore, our biggest expense was our food shop at the local supermarket! (Family, children, Mid Wales, South England, 4-7 days in Wales) ”

Less positively, car parks were found to be expensive in a few cases along with some attractions as highlighted earlier in this report. In isolated instances, eating out was thought to be quite expensive and did not offer great value.

Unexpected spend did arise from time to time such as on unplanned activities (e.g. coasteering, dolphin spotting) and making several purchases at Cardiff Market.

5. Participants' suggested improvements

All participants stated that they **wished to return** to Wales and most wished that they had had more time to explore. As a result there were no strong themes for areas for improvement overall. As one participant summed up, 'keep doing what you're doing'.

“ We were so impressed by the countryside and the activities you can do. We would like to explore more and we're really impressed by the value for money. I also have to go back when my children are older for a week of outdoor activities! (Family, children, North West Wales, South East England, 7 days in Wales)

I would stay in the very north of Wales, as I got hooked on the ancient castles. It is they and this scenic nature that are going to bring me back. (Couple, North Wales, Germany, 4-7 days in Wales) ”

Reflecting on the overall experience, some thought that they would probably spend a little more time **planning things to do**, particularly having had the opportunity through the research to hear about other visitors' experiences. Some also thought that they might **book their accommodation earlier** next time so that there was more choice available.

A couple of participants who had visited Mid Wales thought they would choose somewhere less remote next time; or that they would have benefited from knowing more about what was going on at a more local level in the region.

“ It would be nice if the more isolated or rural areas had a larger media presence as there did seem to be a range of things going on when we arrived at places. [E.g.] There was a little art shop in Aberystwyth high street that was really interesting. As a family, we are always looking for little craft/art shops when we go on holiday as we're all quite creative. We found there was a lack of advertising for places like this online. (Couple with relatives, Mid Wales, South East England, 4-7 days in Wales) ”

Some believe that **enhanced food options** with more culinary distinctiveness for Wales would have improved the overall experience and was an area for improvement which would help raise the country's profile.

“ It's building the status of Wales to be equivalent to the status of Cornwall or the Highlands. This can be done through advancing cultural and culinary highlights of the region, making it distinctive and a unique experience. Saturday newspaper articles are often good at promoting breaks and places to visit in the UK, which I often find very useful. (Couple, Pembrokeshire, Midlands, 2-3 days in Wales) ”

More parking would have been convenient for a small number of participants visiting busy locations. These experiences had prompted a small number of visitors to decide to visit Wales out of season next time.

A further suggestion among overseas participants was for clearer information online to help them plan their use of **public transport**.

6. Research summary

These summary points should be considered in the context of the main quantitative research findings where there is overlap. The quantitative phase provides greater certainty over the prevalence of themes identified by the research.

Motivations to visit Wales

- It was often a combination of factors that led to Wales being chosen as a holiday destination. Wales' natural environment and scenery were prominent themes. A connection with Wales could also be influential: parents' fond childhood memories of trips and wanting to give their children similar memories; a family link in the past; and having spent time in Wales when younger.
- Further contributing motivations included: proximity, developing a routine of visiting Wales, its historic buildings, and the variety on offer.

Wales' strengths

- Reflecting some of the motivations to visit, Wales' perceived strengths were the natural environment and scenery, its peacefulness, enabling quality time with the family, its history, the Welsh language, its sense of pride, friendly people, the variety on offer, its proximity, and unplanned experiences and discoveries. Trip highlights sometimes proved to be shared moments or unexpected discoveries rather than a specific attraction.
- Where identified, Wales' distinctiveness was thought to be found in its scenery, peacefulness, history, language, and sense of pride.
- Participants believed that their holiday in Wales had a positive impact on their wellbeing. They felt relaxed, and often less stressed from work and day to day life. The trip had also left some feeling closer as a family.

Wales' weaknesses

- No significant themes emerged regarding disappointments about the trip. Examples of weaknesses included: how busy certain places were and parking; the price of an attraction; elements not living up to expectations (e.g. an attraction, accommodation or area visited); identifying things to do in Mid Wales that were not too far away; and finding that Welsh food and drink was not very prominent or the food experience was average.

Perceptions of Welsh produce

- Participants reported mixed experiences of Welsh food and drink. The ability to try local produce enhanced the experience for some but others thought it could have been more prominent. Some admitted they were not too bothered about it and were more concerned about value. It was often the case that participants ate in their accommodation rather than out in restaurants, pubs and cafés.

Planning

- Participants tended to plan their trip up to approximately six months before the holiday (e.g. around Christmas or Easter). Google search featured widely as a starting point (e.g. for accommodation and things to do), and participants generally felt that they had been

able to find what they needed. TripAdvisor was quite popular as well, such as its 'Things to do . . .' pages. Specific accommodation sites were also useful. Several national and regional tourism websites were helpful.

- Regarding things to do, participants started to identify possibilities before arriving in Wales, and sometimes booked a couple of activities. Final decisions were often made once in Wales, with the weather being influential. Daily plans therefore could be quite spontaneous. Online sources of information were regularly used for planning when in Wales but local recommendations and printed leaflets also played a role for some.

The amount of travelling while in Wales

- Participants from overseas were more likely to travel more and stay in different places while in Wales, wanting to take in as much as they could. UK based participants were more likely to stay in the same place, either keeping quite local or exploring the region. There were sometimes stopovers on the journey from England (e.g. in Wales or the west of England).

Spending in Wales

- In the main, food was participants' greatest outlay while on holiday in Wales, excluding travel and accommodation. It was often based on supermarket shopping as well as eating out. Examining the detailed, reported spend of a couple participants, however, found that a similar amount was spent on activities and attractions as on food.
- Participants tended to think that Wales was broadly comparable with other parts of the UK with the price of goods; and they spent more or less what they expected to. Wales was sometimes associated with value and a 'budget' trip. Some thought it offered better value than other UK holiday destinations when it came to accommodation, food and museum entry.

Participants' suggested improvements

- The absence of a key theme for improvements to the trip reflects the very positive experiences overall. All participants wanted to visit Wales again. They felt tourism authorities in Wales were doing a good job. Some wished they had acted earlier in the planning process (e.g. booking accommodation and things to do). Some also concluded that enhanced food options would have improved the overall experience, as well as helping Wales to be even more distinctive.
- Other suggestions included improved parking at busy locations and clearer online information regarding public transport.



7. Case stories

The selection of case stories below provides examples of the breadth of individual experiences of Wales visitors. Participant permission was secured for the case stories, and names and some details have been changed to ensure anonymity.

Gianluca: Curiosity and history draw family from Italy to Wales

7 days, Bristol, Cardiff, Bath, Bristol



Curiosity drew Gianluca, his wife and adult daughter from Italy to Wales. They have visited the UK before but never Wales. It made sense to him to begin by visiting its capital city, Cardiff. This seven-day trip was their main holiday for the year. They flew into Bristol from southern Italy. Visits to Bath and Bristol concluded their trip. The bus had looked good value for the transfers – National Express to Cardiff and Megabus for the return leg.

A history and philosophy teacher, Gianluca built historical sites into their itinerary. St Fagan's in particular stood out as memorable with its engaging exhibits. He was very taken with the interpretation at the attraction and the good weather helped. The family were impressed that entry was free. St Fagan's helped to convey a sense of identity for Wales. The teacher in him was delighted visiting the library rooms at Cardiff Castle and he was surprised to see Italian texts there. The castle was another highlight of the trip although it did not feel particularly unique.

He recalls being struck by the cleanliness of Cardiff (compared with his home city) and seeing workers tidying up and rubbish collection taking place. Combined with widespread pedestrianisation, he thinks Cardiff has an 'eco-friendly' feel, again drawing comparisons with his own city.

When needing travel information, Gianluca found it was best to go to a tourist information office, for example to take a boat to the Bay and for bus information to St Fagan's. Bus drivers were also very helpful. The family are keen on using public transport as it's more relaxing and enjoyable. The city seemed well catered for in this respect.

They also liked Cardiff Market and were directed there by a local who suggested they would find more authentic Welsh cakes there than in the shops. They enjoyed fish and chips but weren't aware of any specific Welsh produce other than some Welsh cheeses and meat in the market. He doesn't think Welsh produce is very well promoted. Still, Cardiff as a young capital was generally an interesting proposition overall.

They stayed in a YHA and were happy with it: good quality, clean and breakfast was fine. They were slightly less impressed with Cardiff Bay. The layout, he remembers was quite nice and the Norwegian Church was interesting; but it felt a little too commercial and 'touristy' for their liking. They prefer historic aspects. If they'd had more time, Gianluca sums up, they would have spent more time exploring the history of Cardiff. Accommodation closer to the city centre would have been more convenient as well.

Wales to Gianluca seems proud of its identity with the Welsh language. He was interested in the concept of maintaining it in a complex place like the UK. It's an interesting, original language, he remarks, quite different from Latin languages. He thinks the Welsh are friendlier than the English for example when asking for directions.

The trip met their expectations – in fact he found that they ran out of time with so many things to do. Gianluca liked Cardiff to the extent that he's now considering bringing one of his school classes there for a trip.

Caroline: Keen to give the family some adventure, and introduce children to a destination that holds fond memories

12 days, Forest of Dean, Monmouthshire, Aberdare, Pembrokeshire



Wales is a special place for Caroline and her husband. They met there while studying and she also visited on holiday as a child. She was therefore excited to show her children places in Wales that she had visited when younger and to explore some of Wales' history. The three children are aged ten to twelve.

The most memorable activity was the coastering in quite dramatic conditions. It was so different to what the family normally does. The children really enjoyed the more adventurous elements of the trip, including sea kayaking. The scenery was also memorable – Caroline knew Wales was beautiful but even so, the number of stunning 'vistas' and sandy beaches was still a surprise.

Seeing the Welsh language 'everywhere' added to a sense of distinctiveness. It didn't make a great difference to the trip but the family found it interesting and had fun trying to say Welsh words. The children were surprised to see and occasionally hear it and even watched some S4C as a result. Also seeing the Welsh flag and branding of items in supermarkets with the dragon all helped to create a sense of identity.

The weather wasn't great and caused some anxiety before they travelled but the lovely landscape and activities made up for it. The family have also holidayed in Norfolk in peak season and Wales certainly felt more rural and relatively less crowded. But compared with visits as a child, it did feel busier.

Caroline says that the trip met and probably exceeded their expectations, particularly the coastering. The beaches looked as good as the pictures online. Chepstow, Raglan and Tintern castles exceeded expectations and they made good use of their Cadw membership. They unexpectedly spent two hours at Chepstow rather than the anticipated 20 minutes. Her daughter who loves photography took many photos. It was a bonus that the dog was allowed in the castle as well.

Raglan, Caroline explains, looked even better in the flesh. There was a re-enactment going on that seemed slightly 'weird' to them and reminded her of a 'cosplay convention'. It was okay for the

children but wasn't her cup of tea. Tintern Abbey, which they stumbled across, was great for her daughter's photography.

Foodwise, they thought they would eat out more, but it seemed expensive even though they live in the South East of England. When they did eat out in a restaurant and a pub, the food was disappointing and 'not very Welsh'. Caroline would like to try local dishes and produce but this was limited to bara brith, Welsh cakes and Oggies pasties in St David's which were a hit with the family. She was very aware in supermarkets of Welsh branded products.

A further disappointment was an issue with beach access for their dog at Newgale. The family could not set up on the beach between the lifeguard flags because of the dog; so the parents had to 'tag team' so that the children could play in the sea within the permitted boundaries. Similarly, it was sometimes difficult to find decent walks where the dog could be let off the lead. They tried using an OS map from their cottage but sometimes could not locate the paths or found that they were inaccessible.

Ideally, they would have found accommodation closer to St David's for that part of the trip but there was limited availability when they booked quite late, on Airbnb. After their stay in the Forest of Dean (having travelled from South East England), they had a one-night stopover in Aberdare Country Park which they thought might be interesting. Unfortunately, the weather was very wet. They were all in one room with the dog in a kind of 'bunkhouse'.

Caroline is desperate to return to Wales and explore more, especially as they now have Cadw membership for a year.

Louise: An extended family trip matches memories and previous trips abroad

7 days, Saundersfoot, Tenby

Louise has lovely childhood memories of family holidays to West Wales with her family. A combination of giving her own children (aged two and five) a similar experience and going on holiday with her brother and his family resulted in them choosing Wales. Louise, her partner and two children stayed in the same campsite as her brother with his family in Saundersfoot. She liked the site but would have liked a little more to do within walking distance in the evenings, like a pub.

She finds it difficult to pinpoint what exactly made Wales feel special – the whole experience made the holiday for them. Beautiful quiet beaches were particularly liked and sparked great memories from trips there as a child.



The young children thoroughly enjoyed going out on their bikes– it provided them with a bit of adventure. Louise spotted new routes when out jogging on the Coastal Path and from talking to locals. She liked being able to discover new things this way and coming across 'tucked away' villages. She had been slightly worried the holiday might not be as good as previous main holidays they had taken to Spain, but these concerns were very much unfounded.

They drove up from England's south coast and then stayed local as much as they could as Louise and her partner were keen to avoid using the car. This was partly for environmental reasons, partly to encourage more exercise (she and her partner are keen on sport), but also to maintain the camping / outdoorsy feel to the trip they wanted. Days were often spent with her brother's family, and evenings tended to be family BBQs. The main trip out was to Folly farm which the children loved.

In Saundersfoot, Louise and her partner found the food disappointing. Staff were friendly but the food simply didn't taste very good. Food aside, a pirate themed pub at Wisemans Bridge had been ideal for her children.

Tenby as a whole exceeded Louise's expectations having not visited for a long time. She recalled that it had felt a little 'rough' in the past but it was now stunning: colourful houses, a café culture which felt like being abroad, and an absorbing lifeboat station attraction. Seeing a couple of what might have been whales in the bay on their last day added a moment of magic to the trip.

Grant: Well-travelled US visitor falls in love with rural Wales

4 days, Abergavenny, Cardigan Bay, Aberafon, Snowdonia

Grant lives in Boston in the USA. Having already visited Scotland and South East England, Grant was interested in finding out more about Wales. He decided to meet up with his daughter who is studying at Cambridge University. His wife stayed at home for this trip. He didn't carry out a great deal of research beforehand, other than to explore campsite options. They hired a campervan in London and travelled to Cardigan via Abergavenny and the Brecon Beacons and then up to Snowdonia and Anglesey before returning to London.



With limited expectations, Grant and his daughter were blown away by their Wales experience to the extent that he even found himself looking at property prices for a potential retirement opportunity. There were so many memorable moments, particularly the smaller, 'simple', unexpected and unplanned experiences. They included sitting on a quiet beach watching the sun set while cooking food on a fire, swimming in 'emerald' seas off Anglesey, waking up to a sea view from their campervan, a river hike from a small town where they savoured the moment of water cascading over rocks and stumbling across the Dyfi Osprey project which was fascinating.

Wales, to Grant, was peaceful, quiet and uncrowded. He admits he had loved Scotland but it seemed like one large, national park. Wales felt different: he loved the rolling farmland, its greenness, picturesque views and beaches. It felt unspoiled apart from the Anglesey powerlines which disrupted the experience but in a minor way. He recognised they were needed.

The people they met were down to earth and he vividly recalls visiting a bakery and chatting with the baker who was covered in flour. The pace in Wales seemed less rushed, it felt authentic rather

something produced just for tourists. People he spoke with, like a farmer selling produce in a market, were interested in him as well.

The two of them are vegan so he was not expecting to be especially well catered for on the trip. He was surprised, though, at the vegan options in Starbucks. On reflection, Grant reckons the trip would have been enhanced with more prominent information on vegan food cafés / restaurants en route, perhaps via an app.

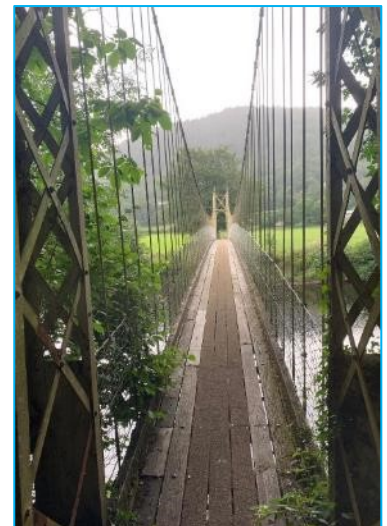
After his whistle-stop trip during which he thinks he drove about 1,000 miles, Grant now plans to return to Wales with his wife. He reckons they'll spend more time in one place so he can get a better feel for the local culture and have time to browse the shops.

Jayne: Empty nester drawn to North Wales' zipwire adventure

10 days, Conwy, Betws-y-Coed, St David's

Jayne had heard from a friend about the amazing experience of Zipworld Velocity 2 near Bethesda and it had been at the back of her mind to do it since. She was prompted about it again more recently by a Facebook memories post, showing her friend on the zipwire. She added on a trip to see friends in Pembrokeshire as well and travelled from the East Midlands with her husband.

The zipwire experience exceeded expectations and was the stand-out moment of the holiday ('excited', 'petrified'). Jayne says she was also very taken with the 'stunning' scenery they experienced while exploring. The weather set off the landscape's colours, greens, heather and mountains. They enjoyed a 360 degree view from their north Wales caravan site. She hadn't realised quite how beautiful Wales could be.



In contrast, Cornwall had felt more commercial and busier than North Wales on previous trips. One aspect Jayne wasn't so keen on was how dogs off the lead would bound up to her and her husband while they walked a stretch of the Coastal Path. She thought it could be dangerous.

They found the locals to be very welcoming but Jayne is convinced on one occasion they switched to Welsh on realising she was English. It might have been a coincidence, she concludes. Even so, she liked hearing the language and thought it 'quirky'. She believes the language should be encouraged. Jayne hadn't realised that the Eisteddfod was taking place at the time they were in Wales and was interested to see people dressed up for it. She researched it on Google but found that they did not have enough time to go along.

Eating out in Betws-y-Coed was an unremarkable experience. Jayne recalls how there seemed to be lots of take-aways and had hoped they might find a restaurant offering regional produce with a traditional Welsh feel to it.

They would like to have stayed longer in North Wales to explore more but had to travel south to stay with friends on the next leg of the trip. In the time they did have available, they managed to

fit in a visit to Conwy Castle (by train), Llanbedrog beach, Sygun Copper Mine and a trip on the Ffestiniog railway.

Hartmut: German visitor finds calmness and experiences nature up close

4 days, Snowdonia



Hartmut flew to Manchester from Germany with his partner and drove to Pwllheli where they had a cottage booked. Joining them there were his brother and mother. They had planned a trip to the Lake District initially, then added on a first leg to North Wales as they were keen on kayaking and the outdoors. He had already come across Wales as a destination in sea kayaking magazines. He had also read a little about Wales' history beforehand and loved the historical aspect of the country.

The most memorable moment was sea kayaking out of Llandudno. They had plenty of kayaking experience but only on rivers and lakes which did not compare with this sea trip. Seeing the coast with its sheer cliffs from a new perspective, encountering curious seals up close for the first time in clear, deep turquoise waters provided for an incredible experience. Other highlights included hiking up the Great Orme.

Another experience Hartmut sought was calmness and an opportunity to bond with his brother, both of which he was able to do. He normally tries to avoid cities and busy places, preferring the 'joy of calm and nature'. Sometimes he just likes to lie down and listen, taking in the surroundings. 'Pure nature' was what he wanted – the Wales he found was unspoiled and authentic. Hartmut has visited other parts of the UK like South England but feels he got more out of his trip to Wales: hobbies, nature, peace, the chance to put the phone away and fully engage in the moment.

In comparison, the Lake District part of the trip did not deliver the same sense of calm and escape. Hartmut recalls how he felt 'crunched in', and there wasn't much time for reflection. There seemed to be more tourists, and lots of mountain bikes when they were out hiking which he didn't appreciate.

Hartmut finds it hard to put his finger on what 'Wales' is: 'a little dark', and 'trenched into the weather' with small houses, narrow roads and grey skies. Not necessarily an epic setting but it felt cosy, as if Wales is 'hiding'.

They were surprised to hear the Welsh language - it sounded funny to them, for example with train announcements. Bilingual road signs made it a little harder to navigate but it was not an issue. Hartmut believes it's appropriate and helps to make the experience feel more authentic.

Overall, they weren't particularly struck by any food options (they hadn't enjoyed fish and chips) but they did like Welsh cakes that they spotted 'everywhere'. Pwllheli, he thinks, was not great for food. There did not seem to be many options, and one restaurant they identified via Google turned out to have closed down. They did on one occasion try some local beef which was excellent – and they liked its low carbon footprint. He thinks they would have eaten more locally sourced

food if it had been prominent / available. It might be more expensive, but it would be more authentic, and 'better for your conscience and global footprint'.

Their cottage was a little small, Hartmut recalls, with a busy road outside. It didn't look very inviting. However, the quality inside was fine and the furnishings comfortable.

On one day, they took a train to Llandudno. He describes how it wasn't clear which website to use to find out times or buy tickets. However, staff at the station were 'super helpful'. More broadly, he says that the local people seemed reserved to begin with, but he subsequently found them to be very warm.

The one improvement he would make would be to have booked better accommodation. They had used Booking.com but with hindsight Hartmut thinks he should have used Airbnb.

Martha: A special occasion mixed in with ancestry reconnection

4 days (1 in Gloucester), Monmouthshire, Valleys

Martha is married but this trip was with six friends and her brother who was visiting from New Zealand. She was celebrating her 50th birthday and they were treating themselves to a gig and fine dining hotels. Everyone travelled from the South East of England to see the Stereophonics at Westonbirt Arboretum and to stay in a local hotel. The following night they stayed in an upmarket country hotel in the Monmouthshire countryside. There was amazing attention to detail, great food and an attractive quirky feel to the place.

The second part of the treat was to dine at a Michelin starred restaurant whose chef Martha had seen on the Great British Menu. The restaurant also had rooms, where they stayed one night. The food was excellent. Both restaurants used locally sourced food including vegetables from their own gardens. One instance that stuck in her mind was late at night with an incredibly bright moon, seeing her brother off home to his nearby accommodation after an outstanding meal.



She's heard about Wales developing more gastropubs but had mixed experiences on an Easter Bank Holiday trip, earlier in the year. Martha remembers a 'dreadful meal' in Conwy in a gastropub whereas one in Llandudno had been fantastic. Local food for her means a tastier, better eating experience. She had enjoyed hearing the 'lilt' of spoken Welsh on that trip and even found it hard not to stare at people speaking it. Her evening out in Caernarfon, however, was not quite what she expected – she was surprised to see the town 'teeming' with drunk young people.

Gastronomy aside, Martha highlights their visit to Tintern Abbey as one of the most memorable aspects of the trip: the sensation of walking around and imagining the lives of people who used to live there. She's keen on history and had seen Wales historic sites on a Facebook group. The party of friends and family was also 'blown away' by the beauty of the Wye Valley which very much exceeded expectations. Everywhere they drove were beautiful vistas including the journey up into

the Valleys where one of her grandparents was born. The whole party was 'quite shocked by how stunning the region is'.

In the Valleys, Martha was able to visit the pub that used to be her grandfather's local – her Welsh connections and ancestry are very important to her. They also drove over the Brecon Beacons which they found breath-taking and, before returning home, took in a walk through a small medieval forest in the hills above Monmouth.

Martha decides that she can't see how the trip could have been made any better, except perhaps for the Prince of Wales Bridge not to have been closed on the way home.

Piotr and Lena: An energising short city / coastal break

5 days Cardiff, Barry

Originally from Poland, Piotr and his girlfriend Lena live in the east Midlands. They both work long hours and were looking for a short break that provided a mix of city and coast / countryside. They settled on Barry for its proximity to Cardiff and beaches – and accommodation was good value as well as clean. A friend had also recommended the region. It was their first trip to Wales.



The highlights of the trip for them were the coastal landscape, relaxing on the beach, and Cardiff with its castle, clean streets, arcades and souvenir shops. Piotr describes how the capital was a pleasure to walk around and, with Barry, how welcoming people were.

They loved the trip to Cardiff Castle with its 'amazing audio story', the keep, and 'real insight' into when the castle was used as an air raid shelter. Reliving those people's experiences was very engaging. Piotr and Lena were also taken with the 'royal part' of the castle with its grand paintings. It reminded him a little of buildings he knew in Krakow. He hadn't been expecting so much history in Cardiff.

Similarly, as vegans they hadn't expected much regarding food options but were pleasantly surprised that they were well catered for. They tried out the nightlife in Cardiff which was 'fun'. They found a few clubs but they weren't playing the kind of music they liked. They also went to a rave but the venue was too crowded for them. Piotr thinks the nightlife in Barry could be improved for young people.

One negative for Piotr was parking in Cardiff: it was expensive and everywhere was very busy. They did use public transport but it proved difficult to identify which buses they could take. It would have enhanced the trip if it had been easier to work out. Piotr also thinks the trip would have been even better if there had been a greater choice of nightclubs in the city, like Poznań. They would have been interested to try vegan Welsh produce but didn't encounter any. Whenever they travel, they like to try 'traditional' food of that country.

When working out what to do in Cardiff, Piotr and Lena often used Facebook events. They found an evening event called Gaia (Hare Krishna food and meditation), the rave mentioned above, an Indian cultural lecture near the Docks and an event happening in the Millennium Centre. Online searching (including TripAdvisor) led them to the Escape Rooms as well. While in Barry they really enjoyed playing in the arcades and going on fairground rides.

This trip provided Piotr and Lena with exactly the kind of short break they had wanted. They left Wales feeling 'energised'.

Rachel: Quality family time and a range of attractions and activities to keep the family entertained whatever the weather

7 days, Aberystwyth

Rachel had two main holidays booked this year, a week in Wales followed by a week in France. She holidays with her parents so that her two children aged six and eight can spend time with them. She chose Wales because she has happy memories of holidays in Gower at a similar age and her dad is from there originally. Rachel wants to create similar memories for her children. Aberystwyth was a joint decision with her parents. They drove up to Wales from their home on the south coast in England.

What stays in her memory most is the quality family time they had, especially in the evenings with virtually no TV all week. Rachel was also impressed with and surprised by Aberystwyth. She hadn't been sure what to expect - perhaps a slightly run-down seaside town. When holidaying in the UK they tend to visit Devon or Cornwall. This region of Wales felt very different in a positive way with the mix of mountains and pastoral countryside. In her words it was 'breath-taking', so much so that they altered their route home so they could experience more of the countryside via winding roads.

In terms of attractions, one highlight was King Arthur's Labyrinth: it was fun, quirky and different. They'd never done anything like it and loved the experience as a family. When the weather was poor, Rachel still feels that there was plenty to do. They visited the Ceredigion Museum one morning and she remarks how she could have spent a couple of hours there. It was modern, fresh and interesting but not something the children were very keen on.



A successful dolphin spotting trip was 'amazing'. However, parking was an issue at New Quay and was generally busy with traffic. Rachel recalls she became stressed about missing the boat while trying to find somewhere to park. The red kite feeding station was another popular attraction visited.

They were not so impressed with the Silver Mountain Experience. To begin with, the website was not very clear, so Rachel had to ring to find out more. It wasn't obvious whether to choose an adults' or children's tour. The experience at the attraction felt disorganised. The visit involved a lot

of standing around and not knowing where to be for the tour to start. Also, it was raining so while waiting for a tour there wasn't much for them to do - 'a bit rubbish' sums up Rachel.

The cottage was lovely but there were a lot of flies in the house on arrival as it was on a working farm; so Rachel had to buy some fly killer. There was a good play area on site and hot tub which the children loved. Unfortunately, the wifi wasn't working which was disappointing (some technical issue according to the owner). As a result, she used up a lot of mobile data when searching for things to do and planning wasn't quite so easy.

They didn't eat out much and started the week with a large supermarket shop. They did have fish and chips out one evening and also ate out at a café near the beach in New Quay. The café was extremely busy and their food was not served together so the children had finished theirs before the last plate arrived.

Rachel remembers a wide selection of Welsh produce in Tesco, especially Welsh cheeses. Her dad purchased his favourite Welsh tea Glengettie. Overall, she's not very bothered about Welsh produce.

The children became excited on hearing Welsh spoken. Rachel says it helped to give them a sense that they were truly on holiday in a foreign country. The mountains, rolling countryside and Welsh language made it feel as though they were 'properly away'.

Emphasising the impact on the children, Rachel explains that her eight year old daughter decided to keep a scrap book for the holiday. The children still talk about the hot tub and dolphin spotting. She had been concerned that the trip to France would eclipse Wales in their eyes, but Rachel has found that they talk just as much about the visit to Wales as the France trip.

Paul: Knows Wales - always provides a chance to relax, explore and indulge passions

11 days, Elan Valley, Aberystwyth, Criccieth, Aberaeron, Morfa Nefyn, Llanystumdwy, St David's

Paul and his family started planning the trip only a few weeks before they left, prompted to act by the approaching school summer holidays. He is married with a primary school aged child. This was their main holiday of the year, using the family campervan. Based in South West England, it was a 500-600 mile, 11-day round trip.

They have completed a similar route for the last couple of years. They like the flexibility of planning as they go along, exploring an area for a few days as they go.

Paul loved the relaxed pace of the holiday versus his pressured working life in hospitality. In particular, the great outdoors, beautiful views and unspoiled nature of Wales create moments to cherish for the family. Camping adds to the relaxed experience with no real routine to keep to each day.



Comparing Wales with other UK areas, Paul feels that it is less spoiled or developed than Cornwall which is still pretty but feels busier. He thinks it's important for Wales to preserve this element. He also senses that Wales doesn't have the slightly jaded feel he has encountered in Cornwall: it's reflected he believes in the local business owners he met who were genuinely welcoming, very friendly and interested in their guests rather than seemingly going through the motions. It feels more personal to him in Wales. Hearing Welsh contributed to his enjoyment of the trip and sense of place.

Activity-wise, the family often focus on the coast with two passions being bodyboarding and, for Paul, fishing. St David's especially ticks both boxes. They take bikes with them as well.

Looking ahead to next year, Paul has already been partly inspired by the Visit Wales website to seek out new areas of Wales while including one or two favourites like St David's. They might, he thinks, concentrate a little more on mountains and perhaps Snowdonia.

As a chef, the only disappointment for Paul about the trip was the food on offer. He's familiar with Wales' amazing coastline, great shellfish and livestock but struggled to find good quality food as they made their way up through Wales towards Anglesey. He concludes that there must be some gems, but he's yet to find many. Exceptions were Oggies in St David's and an unexpected stop-off at a brewery - a great experience and impromptu guided tour. He'd like to see more options like these. Businesses, he suggests, should be encouraged to promote their food and drink, perhaps via a dedicated website that highlights the options and provides genuine, critic reviews.

So overall, his expectations were met apart from the food issue. He broadly knew what to expect based on previous visits to Wales. Elan Valley was a new addition to his Wales experiences and, despite the rain, looked very pretty. Ideally, there would have been a pub within walking distance of all the campsites they stayed in.