



REPORT

Shoulder Season Visitor Survey 2018

Cadw



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## 1. Headline Findings

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**Visitors travelling from further afield** This survey has seen a shift towards shoulder season visitors from outside Wales (67% – compared to 57% last time). However the 2015 shoulder season interviews took place between mid February and late March, whereas this year the poor March weather meant that the survey was being finished off in early April.

The 67% from outside Wales is split 54% UK / 13% overseas.

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**ABC1s still dominate** Most (81%) shoulder season visitors are ABC1s – similar to the previous shoulder season survey in 2015 (78%).

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**Age profile** The age profile of respondents in the shoulder season remains relatively young, with about half (49%) in the 25 – 44 age group.

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**Motivation to visit** About a third (31%) of respondents have been motivated to visit a Cadw site by a 'particular exhibition' – a significant increase from 5% in 2015. This answer is particularly high at Caernarfon Castle (62% of respondents).

Caernarfon was barely included in the 2015 sample due to work taking place at the time, so it may explain the difference in this particular result.

Generally speaking, interest in Welsh culture / history as a motivation for visiting is higher at North Wales sites, especially at Criccieth (70% of respondents) and Caernarfon (51%).

At some South Wales sites, interest in Welsh culture / history appears less strong, especially at Caerphilly (13%).

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**Leaflets still matter** About two in five (39%) say they found out about the attraction because they live in the area / have always known about it, and about one in five (21%) have found out through word of mouth. These results are very similar to the 2015 survey.

9% say they found out through a leaflet for the attraction. This is higher than the Cadw website (5%) and social media (2%) combined, showing that leaflets still play an important role in raising awareness in spite of technology.

## 2. How and why has this research been conducted?

**Informing marketing strategy** Cadw wished to gather evidence on visitor demographics to inform future market segmentation strategy. The key objective was to analyse patterns in the visitor profile and compare with previous research. Key demographic data would include age, gender, family status, SEG, place of residence and behaviour.

**Building on previous research** Cadw also conducted visitor surveys in the shoulder season and summer season of 2015. This report makes comparisons with both surveys throughout, where differences are significant.

**Face-to-face interviews** We have conducted 1,495 interviews at 10 Cadw sites in March and early April 2018 using a questionnaire based on previous Cadw surveys. The sample structure by site is shown below:

Site	No. of interviews
Beaumaris Castle	114
Caernarfon Castle	212
Caerphilly Castle	221
Castell Coch	137
Chepstow Castle	127
Conwy Castle	216
Criccieth Castle	120
Harlech Castle	106
Raglan Castle	125
Tintern Abbey	117
<b>Total</b>	<b>1,495</b>

**Analysis structure** For questions with a limited number of answer options, the chart shows the breakdown in answers by site.

For more complex questions we simply show overall results for all sites combined, as the chart would be too busy and incomprehensible if broken down by site.

We have highlighted any significant differences by site in the text, and we have also produced an accompanying set of cross-tabulations where all results to questions with quantifiable answers can be viewed by site.

## 3. Results

### Key demographics

Description of respondent	2018 (shoulder season)	2015 (shoulder season)	2015 (summer season)
<b>Gender</b>			
Male	50%	49%	50%
Female	50%	51%	50%
<b>Age</b>			
16 – 19	1%	2%	<i>Question not comparable</i>
20 – 24	7%	5%	
25 – 34	23%	21%	
35 – 44	26%	26%	
45 – 54	17%	20%	
55 – 59	8%	8%	
60 – 64	7%	7%	
65+	11%	11%	
<b>SEG</b>			
AB	44%	36%	39%
C1	37%	42%	38%
C2	13%	14%	15%
DE	6%	8%	8%
<b>Where resident</b>			
Wales	33%	43%	25%
UK outside Wales	54%	48%	56%
Overseas	13%	9%	19%
<b>Ethnicity</b>			
White	95%	96%	96%
Other	5%	4%	4%

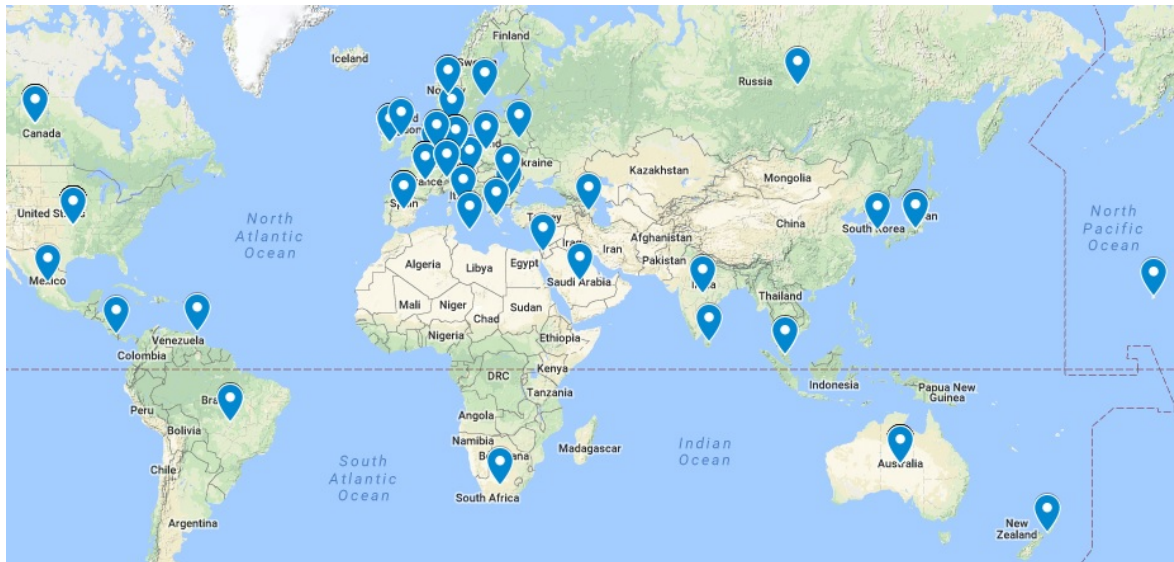
*Percentages for SEG and age have been re-based to exclude respondents refusing to answer*

### Visitors coming from further afield than in the previous shoulder season survey

- 3.1 One of the defining characteristics of visitors in the previous shoulder season survey was that they were much more likely to be Welsh residents compared to the summer season.
- 3.2 This survey has seen a shift towards shoulder season visitors from outside Wales (67% – compared to 57% last time). However, the timing of interviews should be taken into account. The 2015 shoulder season interviews took place between mid February and late March, whereas this year the poor March weather meant that the survey was being finished off in early April.
- 3.3 The maps below show where the UK visitors and overseas visitors come from.

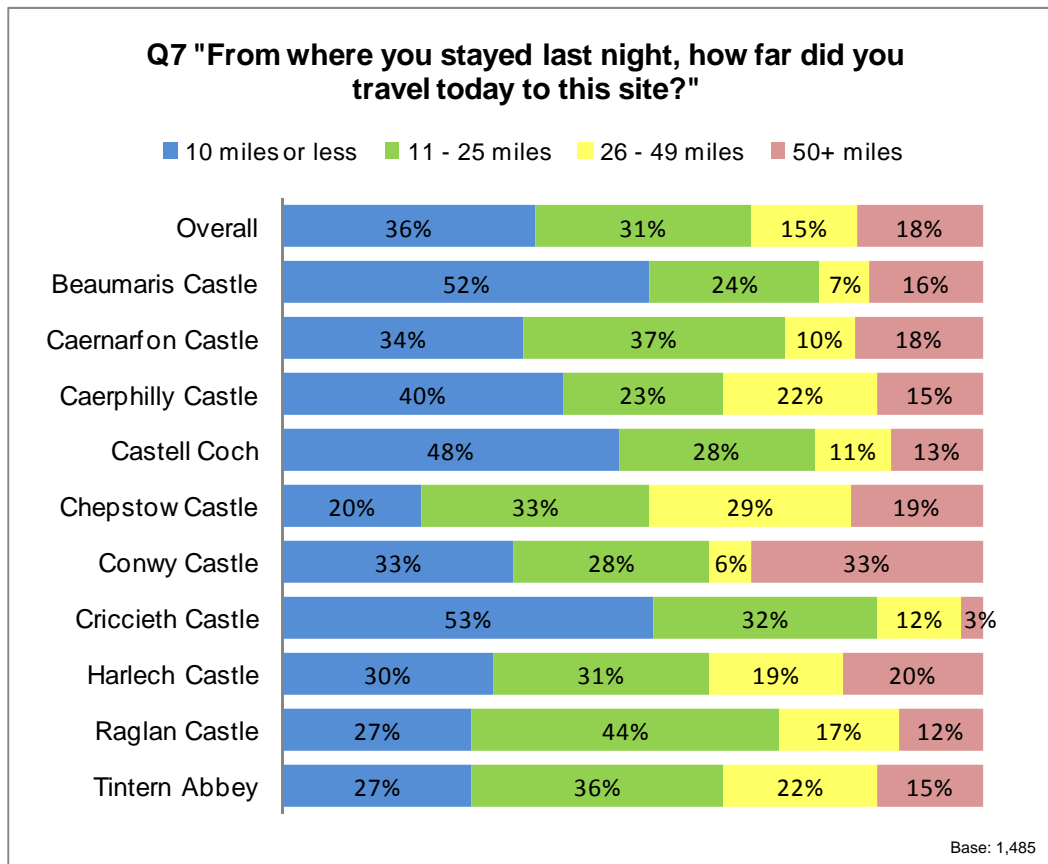


- 3.4 There is no part of England and Wales that is not well represented with visitors to Cadw sites, except the North East, where the density of visitors suddenly thins out. Noticeably few visitors come from Scotland in the shoulder season.



3.5 Overseas visitors make up 13% of the shoulder season profile. Every continent is represented, with the furthest visitors travelling from New Zealand and Hawaii (the marker on the far right which appears to be in the Pacific Ocean).

## Distance travelled



### Conwy attracts many long distance travellers

3.6 A third (33%) of Conwy Castle's shoulder season visitors travel 50+ miles to get there – very similar to the 2015 shoulder season.

### Being close to a major city can influence travel distances for some sites

3.7 Castell Coch and Caerphilly Castle are both situated very close to Cardiff, and this may explain why a large proportion of their visitors travel 10 miles or less to get there.

### Shift in results for Beaumaris

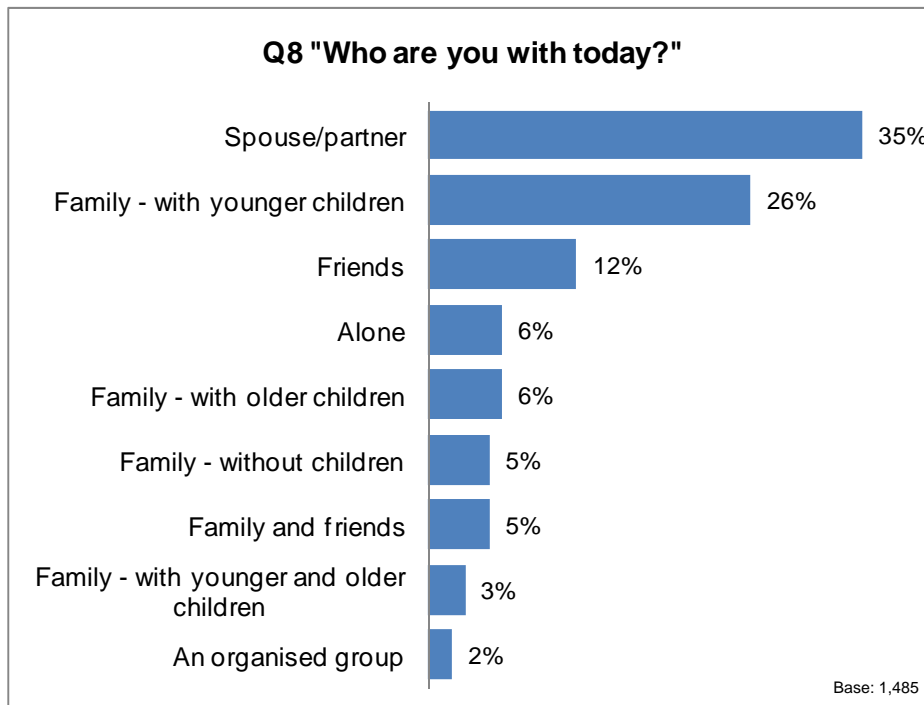
3.8 About half (52%) of shoulder season visitors to Beaumaris travel 10 miles or less – a significant increase from 38% in 2015.

### Overall picture is similar to last time

3.9 Across all sites combined, the results are similar to the 2015 shoulder season survey. The median distance travelled remains roughly 25 miles.



## Party type



### Very similar profile to 2015

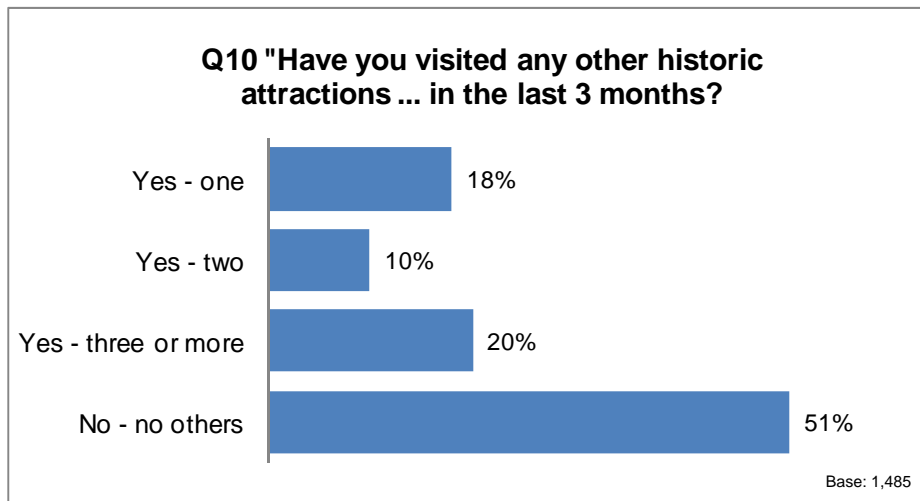
- 3.10 The party profile is very similar to the 2015 shoulder season results.
- 3.11 Visiting families remain far more likely to have younger children than older children. This may reflect the appeal of Cadw sites, or it may reflect the lower likelihood of teenagers still wanting to go on trips with their parents.

### Some changes in profile by site

- 3.12 Raglan Castle has by far the highest proportion (54%)<sup>1</sup> of families with younger children in its profile. This is much higher than in 2015 (25%).
- 3.13 Conversely, Conwy Castle has seen a shift from young families to couples. Close to half (43%) of shoulder season visitors to Conwy Castle are couples, compared to 29% in 2015. But the proportion of families with young children has decreased from 45% (when it was the highest of any site) to 25%.

<sup>1</sup> This figure comes from adding together families with younger children (48%) and families with younger and older children (6%)

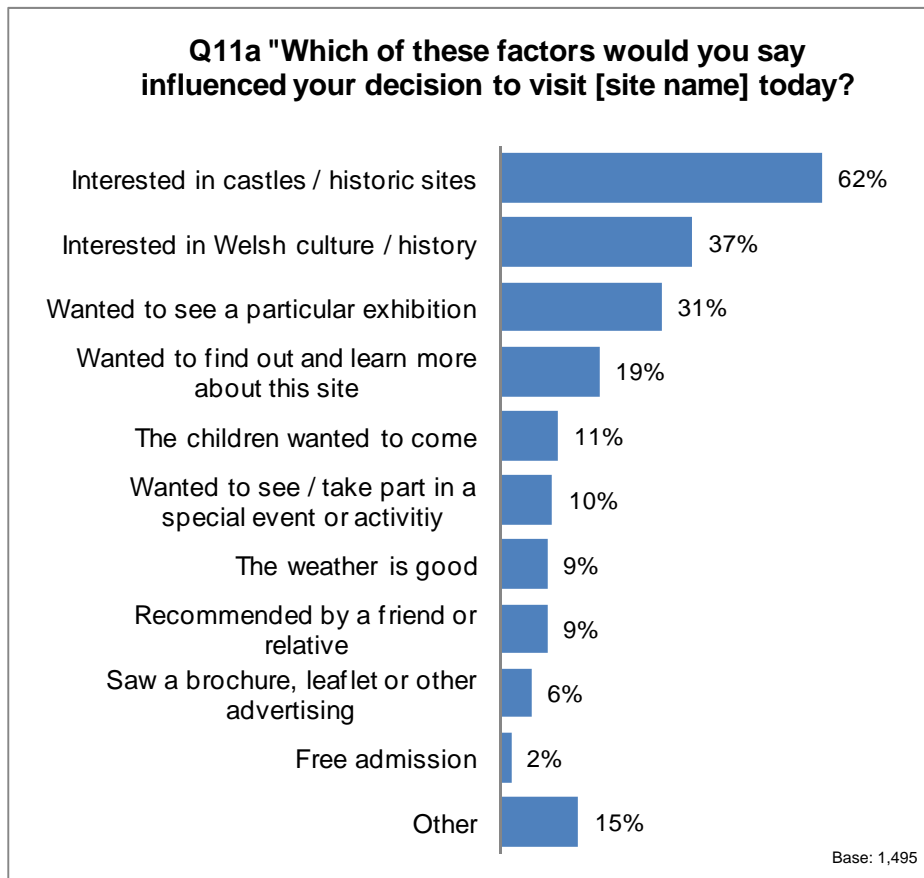
## Visits to other historic attractions



### Emerging from the winter months

- 3.14 As was the case in 2015, a large proportion (51%) of respondents when interviewed were visiting their first historic attraction for over three months.
- 3.15 Visitor numbers to historic attractions in general are lower in the winter months, and so for many, this visit may have marked the start of their 'historic attraction season'. It would be interesting to ask this question in a summer survey for comparison.

## Influences on the decision to visit

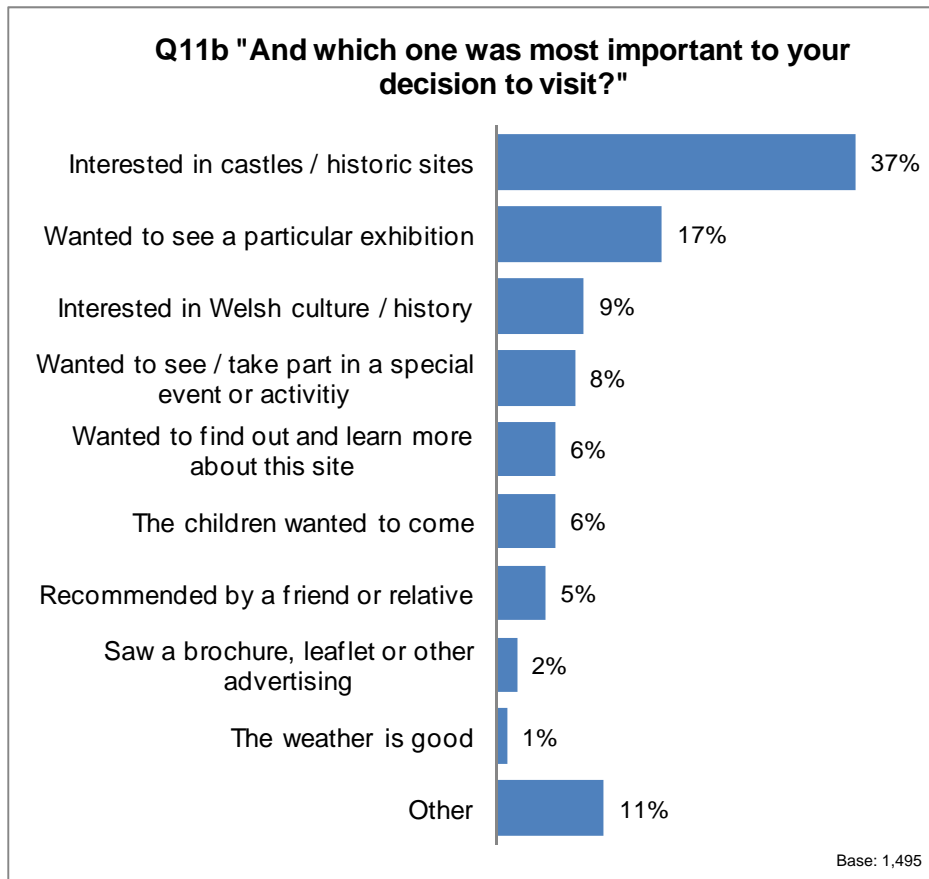


### Exhibitions – significant increase in focus

- 3.16 The motivation for visiting is mostly the same as in 2015, except that '*wanted to see a particular exhibition*' has increased significantly from 5% of answers to 31%. This answer is particularly high at Caernarfon Castle (62% of respondents).
- 3.17 Caernarfon was barely included in the 2015 sample due to work taking place at the time, so it may explain the difference in this particular result.

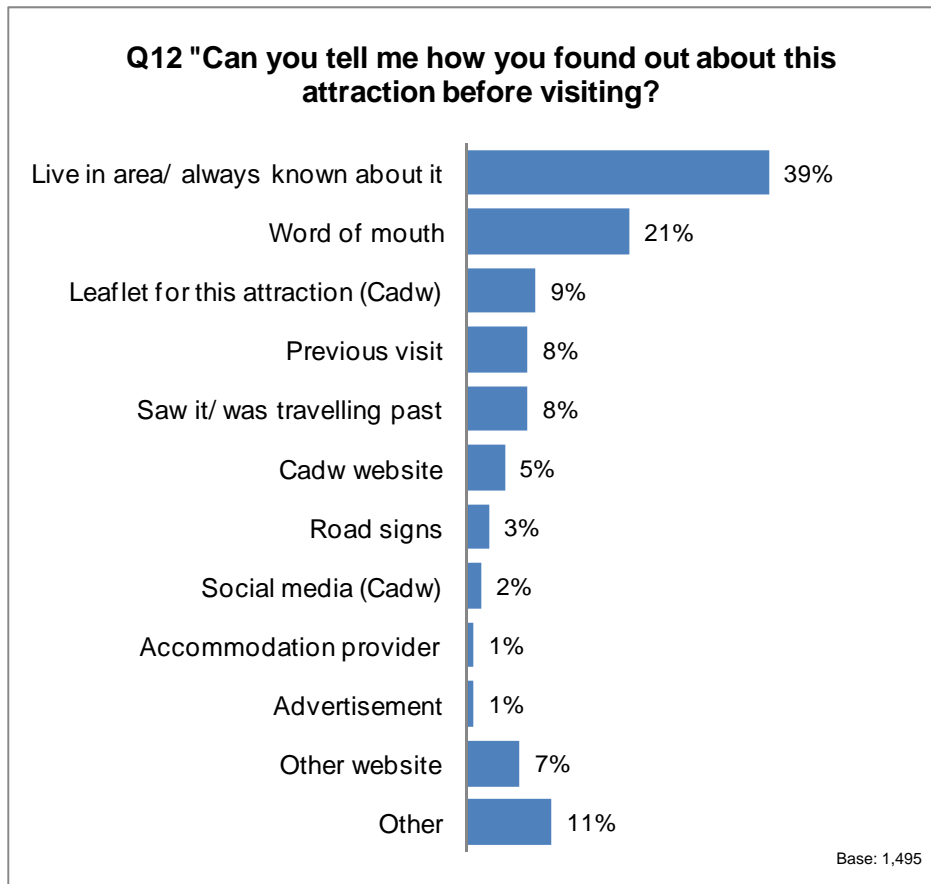
### Interest in Welsh culture / history higher in North Wales

- 3.18 Generally speaking, interest in Welsh culture / history as a motivation for visiting is higher at North Wales sites, especially at Criccieth (70% of respondents) and Caernarfon (51%). Criccieth attracts a high proportion of its visitors locally and so this may partly explain its result.
- 3.19 At some South Wales sites, interest in Welsh culture / history appears less strong, especially at Caerphilly (13%).



**Some variation in results by site**

- 3.20 As in 2015, when narrowed down to the single most important influencing factor on the decision to visit, 'interest in castles / historic sites' is the clear single most important one (37% of respondents). This is especially true for visitors to Tintern Abbey (67%).
- 3.21 At Caerphilly Castle and Castell Coch, where many visitors travel from within 10 miles, there is more of a sense that visitors are looking for something to do for a day out. About a third (31%) of visitors to Caerphilly Castle have turned up for a special event (much higher than at other sites), and Castell Coch has the highest proportion (11%) of visitors saying the children wanted to come, compared to other sites.



### Similar results to 2015

3.22 As in 2015, awareness stems from a variety of sources. The top two sources of awareness remain as before – ‘live in area / always known about it’ (39%) and ‘word of mouth’ (21%). Sometimes it is hard for respondents in a survey to pinpoint exactly how and where they first became aware of an attraction.

3.23 Among the more specific sources of awareness given, online and offline sources have both played a role in raising awareness. The sites where the Cadw website has raised awareness the most are:

- Caerphilly Castle (8% of respondents)
- Castell Coch (7%)
- Chepstow Castle (7%)

3.24 The sites where Cadw's social media has raised the most awareness are:

- Conwy Castle (4%)
- Caerphilly Castle (3%)
- Castell Coch (3%)

3.25 The sites where Cadw leaflets have raised the most awareness are:

- Harlech Castle (17%)
- Castell Coch (16%)

## 4. Conclusions

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<b>Differences between the seasonal profiles</b>	<p>While there are some differences with the 2015 shoulder season survey possibly caused by slightly later interviewing, the shoulder season profile remains more Wales-focussed and younger family focussed compared to the summer.</p> <p>Our previous off-peak surveys for Visit Wales have shown there is a need for local families with young children to get out of the house and do something, even when the weather is not great. Summer visitors are more likely to have travelled from further afield and may well be on holiday in the area.</p>
<b>ABC1s still dominate</b>	<p>Most visitors to Cadw sites are ABC1s. If Cadw is happy for this to remain the case, marketing messages should appeal to this social class, using channels they are exposed to.</p>
<b>Welsh culture in North Wales</b>	<p>The motivation to visit Cadw sites is different in North Wales compared to some sites in South Wales. Visitors to North Wales sites have a greater interest in Welsh culture / history and so this should be reflected in the information provided to them.</p> <p>By comparison, visitors to Caerphilly Castle and Castell Coch seem less interested in the 'Welsh' aspects of the offering and there is perhaps a sense that they are looking for something to do. Therefore special events might be more effective at boosting visitor numbers to these two sites.</p>
<b>Leaflets still matter</b>	<p>The awareness raised by leaflets is greater than the Cadw website and social media channels combined. Although more costly to produce, they still appear to have their place in raising awareness and attracting visitors.</p>
<b>A question for a summer survey</b>	<p>The question (Q10) about recent visits to other historical sites is perhaps better asked in a summer survey. Visitor numbers to Cadw and similar attractions are generally low in the winter months and so we would learn more about recent visitor behaviour in the busier part of the 'outdoor attractions season'.</p>

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