



Cadw Visitor Survey 2015 Project Report

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1. Executive Summary

Significant difference in proportion of visitors from outside Wales between seasons

- 1.1 UK and overseas visitor numbers to Wales are higher in the peak season compared to the shoulder season, and this is reflected in Cadw's peak season visitor profile. Three in four (75%) peak season visitors are from outside Wales, compared to a lower proportion (57%) in the shoulder season.
- 1.2 This year the proportion of overseas visitors to Cadw sites is particularly high (19%). Visitors have come from countries all over the world, with the highest proportions coming from markets traditionally strong for Wales – mainland Western Europe and long-haul English speaking. 4% of all Cadw visitors this summer have come from the USA, and this is followed by Germany (3%), Australia (2%), France (2%) and the Netherlands (2%).

Differences in purpose of visit to the area

- 1.3 Overall, about two in three (68%) visitors to Cadw sites are holidaymakers, although this varies significantly by region of Wales. Most (87%) visitors to North Wales sites are holidaymakers, compared to a much lower proportion (47%) of visitors to sites in South East Wales.

High proportion of new visitors to all sites

- 1.4 The majority (69%) of visitors to Cadw sites this summer have visited the site for the first time. The results are very similar to the shoulder season in 2015 and the summer season in 2013.

Overall high satisfaction maintained

- 1.5 Overall visitor satisfaction averages a high 9.0 out of 10. This is the same result as in the shoulder season 2015 and the summer season 2013. Visitor satisfaction still comes as a surprise though, as half (50%) of visitors describe their experience as 'much better' than expected.
- 1.6 The top four rated sites in terms of overall satisfaction are Plas Mawr (9.5), Caerleon (9.4), Tintern (9.4) and Blaenavon (9.3).
- 1.7 Cadw staff are rated very highly again, with the average 'knowledge of staff' rating of 9.6 and 'friendliness of staff' rating of 9.5. The all important 'value for money' rating is 9.1.
- 1.8 The only weakness in the ratings remains 'suitability for children 7 or under' (8.1).

Generally shorter distances travelled compared to previous survey periods

- 1.9 About two in five (39%) visitors to Cadw sites have travelled 10 miles or less, and a further third (33%) have travelled 11 – 25 miles, which makes the majority (72%) of journeys 25 miles or less.
- 1.10 This compares to a lower proportion (61%) of journeys in both the 2015 shoulder season and 2013 summer season being 25 miles or less.

Mixture of different motivations to visit with children

- 1.11 Parents and grandparents visiting Cadw sites with children have a range of motivations to visit with respect to what they want the children to gain from the visit. This ranges from stimulating the children's interest in learning to just going for fun. Most (72%) parties visiting with children hope for a mixture of learning and fun.
- 1.12 Results vary by site. At the 'learning' extreme, all (100%) visitors to Caerleon have placed more emphasis on their children learning something than having fun. Kidwelly also stands out as a site where most (94%) visitors place more emphasis on their children learning something.
- 1.13 At the 'fun' extreme, Castell Coch stands out, with the majority (71%) of visiting parents and grandparents placing more emphasis on their children having fun than learning something. Likewise, about two thirds (64%) of visitors with children to Tintern Abbey place more emphasis on the fun element of the visit.

Novel information format, but not more so at sites with improved interpretation

- 1.14 Three in five (60%) visitors say the format of information at the attraction is 'novel and appealing'. This is the same result as in the shoulder season survey in 2015.
- 1.15 However, as was also the case in the shoulder season survey, sites with improved interpretation (where 56% of visitors describe the format as novel and appealing) do not fare better than sites without improved interpretation (where 62% describe the format as novel and appealing).
- 1.16 Caerleon fares extremely well again, as it did in the shoulder season survey, with nearly all (97%) of its visitors saying the information is novel and appealing. Blaenavon (94%) and Plas Mawr (86%) also fare extremely well.

2. Background and Methodology

Research context

- 2.1 In 2008, Cadw commissioned a visitor survey at selected staffed sites to understand the profile of visitors and their experience. The 2008 visitor survey served as a benchmark for future projects. It was repeated in the summers of 2011 and 2013.
- 2.2 In 2014 Cadw commissioned *Visitor satisfaction and dwell time research* in order to understand the impact of improved interpretation on dwell times and the visitor experience. 61% of respondents reported they found the format of information novel and appealing at sites with *improved interpretation*, compared to 36% at sites that had not yet been improved.
- 2.3 In 2015 Cadw commissioned its first *Shoulder season visitor survey* in order to understand the profile of shoulder season visitors, motivations for visiting and how this differs from the peak season. We found that Welsh residents and the 25 – 34 age group are much more prominent in the shoulder season.
- 2.4 Cadw commissioned this summer visitor survey in 2015 to build on the results of recent surveys.

How was this Summer 2015 research conducted?

- 2.5 Strategic Marketing worked with Cadw to design a questionnaire suitable for face-to-face interviewing with visitors at Cadw sites.
- 2.6 Strategic Marketing interviewers conducted 2,563 interviews at Cadw sites between 19th July and 30th August 2015. The table below shows the breakdown of interviews by site:

Site	No. of interviews
Beaumaris Castle	202
Blaenavon Ironworks	108
Caerleon Roman Fortress and Baths	116
Caernarfon Castle	201
Caerphilly Castle	208
Castell Coch	193
Chepstow Castle	115
Cilgerran Castle	42
Conwy Castle	196
Criccieth Castle	103
Denbigh Castle	25
Harlech Castle	205
Kidwelly Castle	99
Lamphey Bishop's Palace	14
Laugharne Castle	28
Oxwich Castle	10
Plas Mawr	100
Raglan Castle	190
Rhuddlan Castle	50
Rug Chapel	9
Strata Florida Abbey	11
St. Davids Bishop's Palace	105
Tintern Abbey	198
Tretower Court & Castle	11
Valle Crucis	8
White Castle	16
Total	2,563

Analysis structure

- 2.7 Wherever feasible, the chart for each question shows the breakdown in answers by site. Sites with small sample sizes are not singled out in the analysis in this report, but their interviews do count towards the overall totals.
- 2.8 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.
- 2.9 Open-ended comments given by respondents add to our interpretation of the results and we use a balanced selection of comments throughout in order to illustrate key points.

3. Results

Visitor Profile

Description	2015 (peak season)	2015 (shoulder season)	2013 (peak season)
Gender			
Male	50%	49%	46%
Female	50%	51%	54%
Age			
0 – 7	12%	<i>Question not comparable</i>	<i>Question not comparable</i>
8 – 15	13%		
16 – 24	7%		
25 – 34	11%		
35 – 44	17%		
45 – 54	15%		
55 – 64	11%		
65+	14%		
SEG			
AB	39%	36%	40%
C1	38%	42%	35%
C2	15%	14%	17%
DE	8%	8%	8%
Where resident			
Wales	25%	43%	24%
UK outside Wales	56%	48%	60%
Overseas	19%	9%	16%
Ethnicity			
White	96%	96%	98%
Other	4%	4%	2%

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

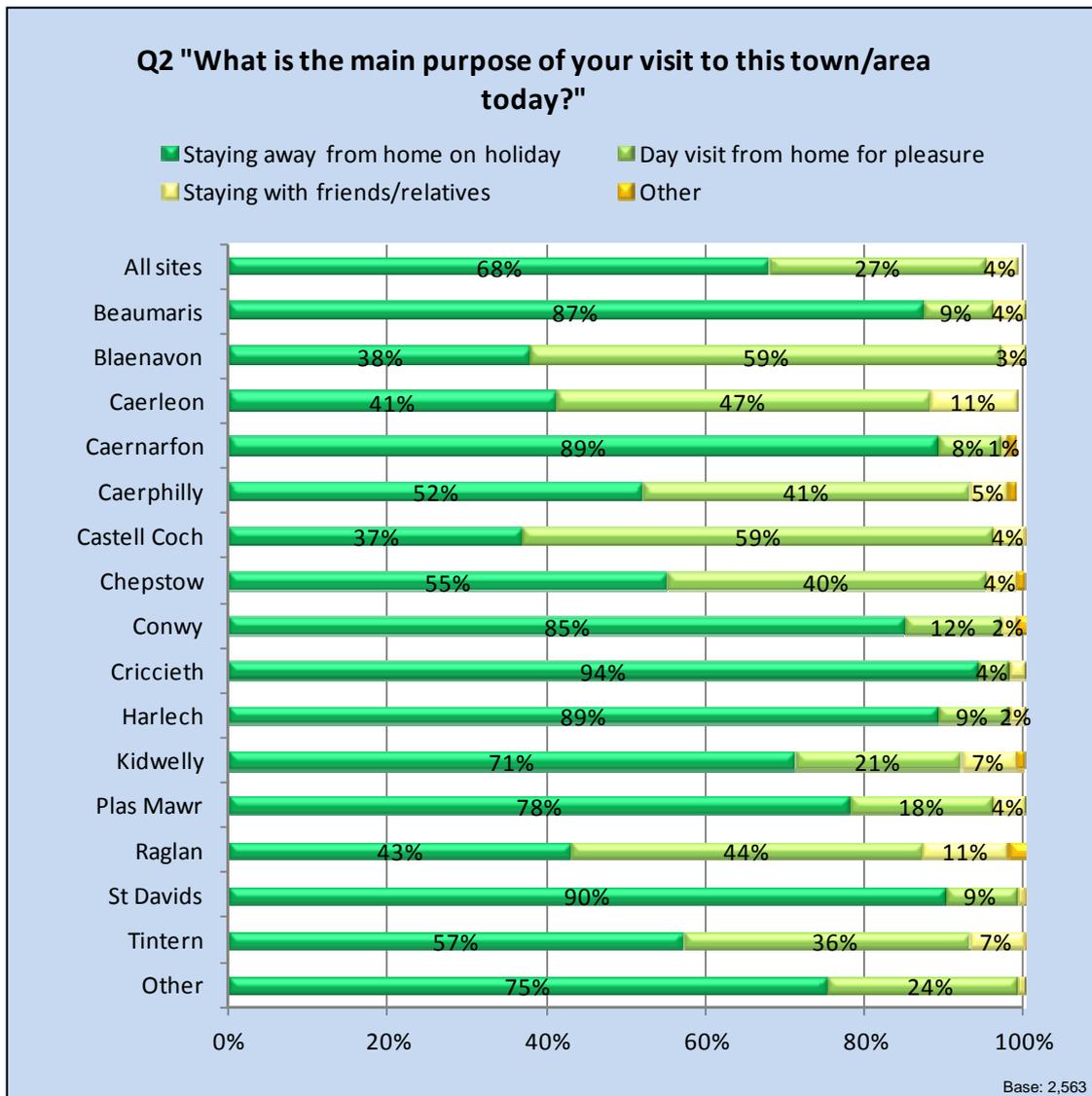
Significant difference in proportion of visitors from outside Wales between seasons

- 3.1 UK and overseas visitor numbers to Wales are higher in the peak season compared to the shoulder season, and this is reflected in Cadw's peak season visitor profile. Three in four (75%) peak season visitors are from outside Wales, compared to a lower proportion (57%) in the shoulder season.
- 3.2 This year the proportion of overseas visitors to Cadw sites is particularly high (19%). Visitors have come from countries all over the world, with the highest proportions coming from markets traditionally strong for Wales – mainland Western Europe and long-haul English speaking. 4% of all Cadw visitors this summer have come from the USA, and this is followed by Germany (3%), Australia (2%), France (2%) and the Netherlands (2%).

Age profile

- 3.3 The age profile has been measured in a different way for this survey, with respondents being asked to state the number of people in their party falling into each age category. Previously, just the age of the *respondent* was asked for, and as respondents are always adults, this did not measure the proportion of children visiting.
- 3.4 One in four (25%) visitors (*not parties*) are children under 16, and this is split fairly evenly between under 8s (12%) and over 8s (13%).

Main purpose of visit to the area

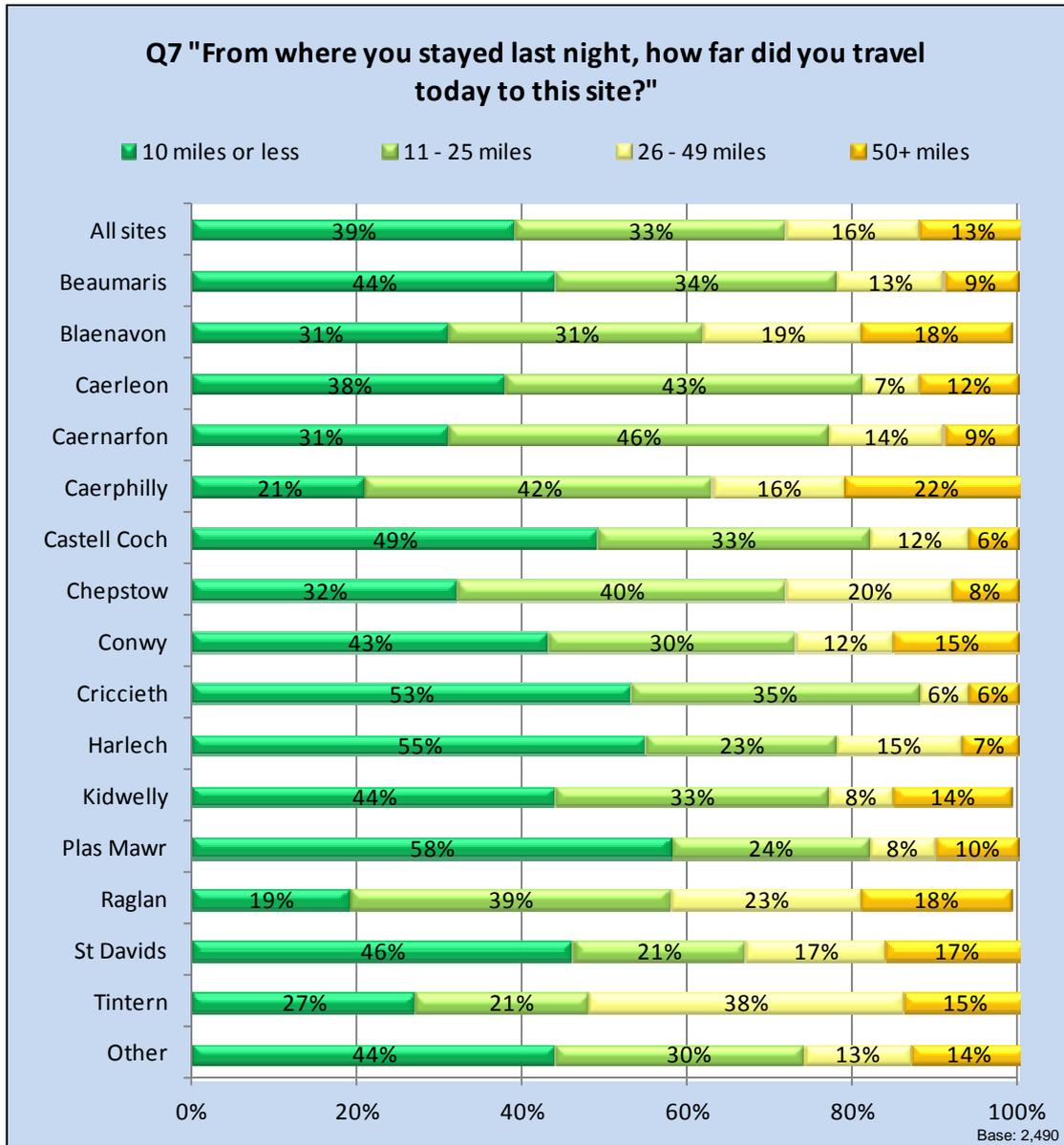


Castles in popular holiday areas have a different visitor profile

- 3.5 In terms of the main purpose of visiting the town or area where the site is located, castles in popular holiday areas attract a different make-up of visitors.
- 3.6 Criccieth Castle (close to Snowdonia), St. Davids Bishop's Palace (Pembrokeshire), Harlech Castle (Snowdonia), Caernarfon Castle (close to Snowdonia) and Beaumaris Castle (Anglesey) have all attracted the vast majority of their summer visitors from among holidaymakers in the area.

- 3.7 In comparison, visitors to sites in South East Wales in particular have a more balanced mix between visitors staying away from home and day visitors to the area.
- 3.8 Overall there is a noticeable difference between the summer season and the shoulder season. The majority (68%) of summer visitors are holidaymakers in the area, compared to a much lower proportion (41%) in the shoulder season.

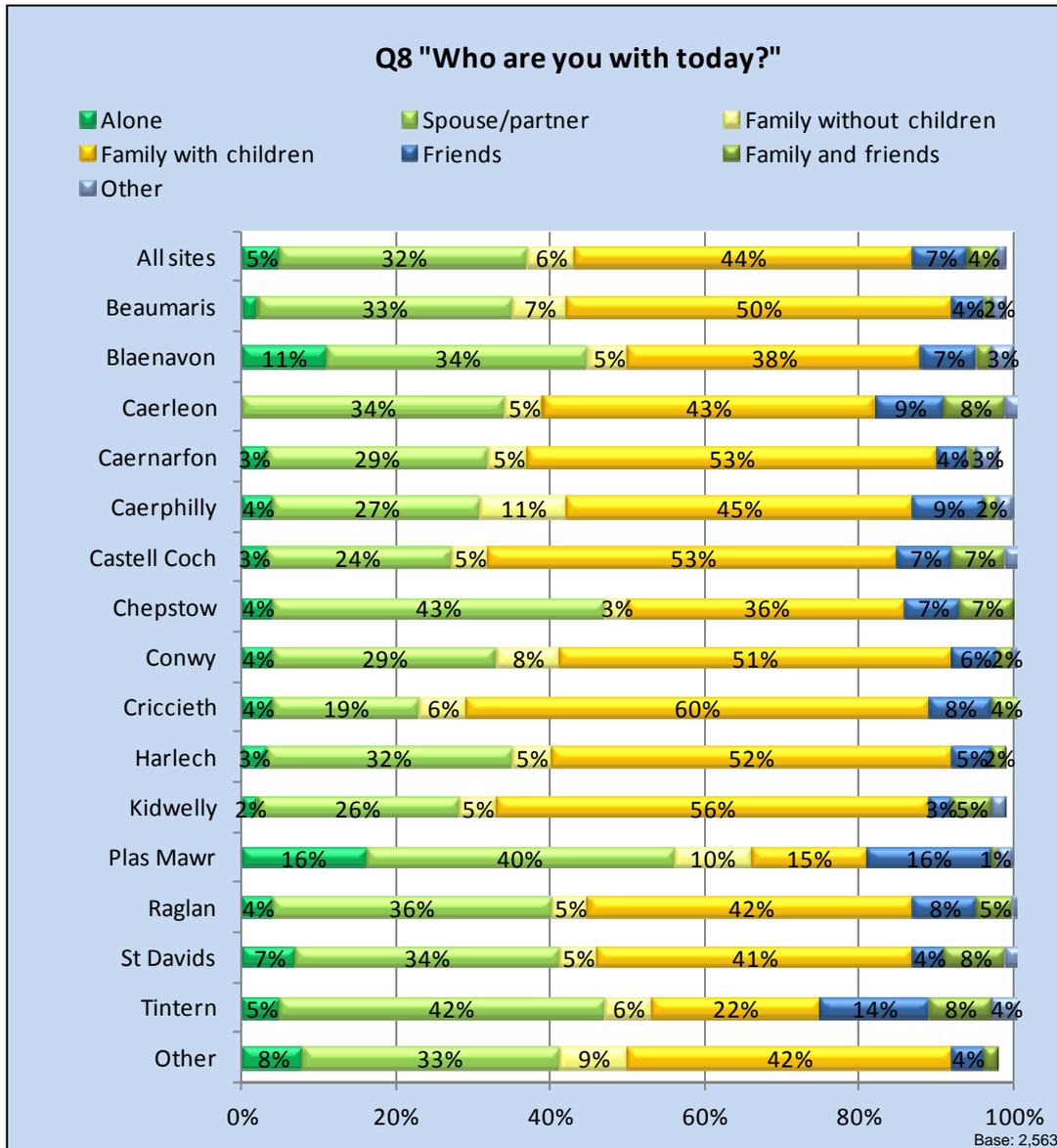
Distance travelled to the site



Generally shorter distances travelled compared to previous survey periods

- 3.9 About two in five (39%) visitors to Cadw sites have travelled 10 miles or less, and a further third (33%) have travelled 11 – 25 miles, which makes the majority (72%) of journeys 25 miles or less.
- 3.10 This compares to a lower proportion (61%) of journeys in both the 2015 shoulder season and 2013 summer season being 25 miles or less.

Type of party



Families strongly represented

- 3.11 Cadw sites attract many families with children - not far short of half of all visiting parties (44%). This is very similar to the 2015 shoulder season and the 2013 summer season results.
- 3.12 Families with younger children (34%¹ of parties) outweigh families with older children (15%² of parties) significantly. This might imply that Cadw sites' appeal is perceived to be more for younger than older children, but later results in Q17 say otherwise. The difference in profile might be a reflection of how many teenagers really want to go on days out with their parents.

Variations by site

- 3.13 There are variations in the visitor profile by site. Criccieth attracts many families with children (60% of visiting parties), whereas Plas Mawr and Tintern Abbey have a different kind of appeal which seems to be less for children and more for couples and groups of friends compared to the average site.

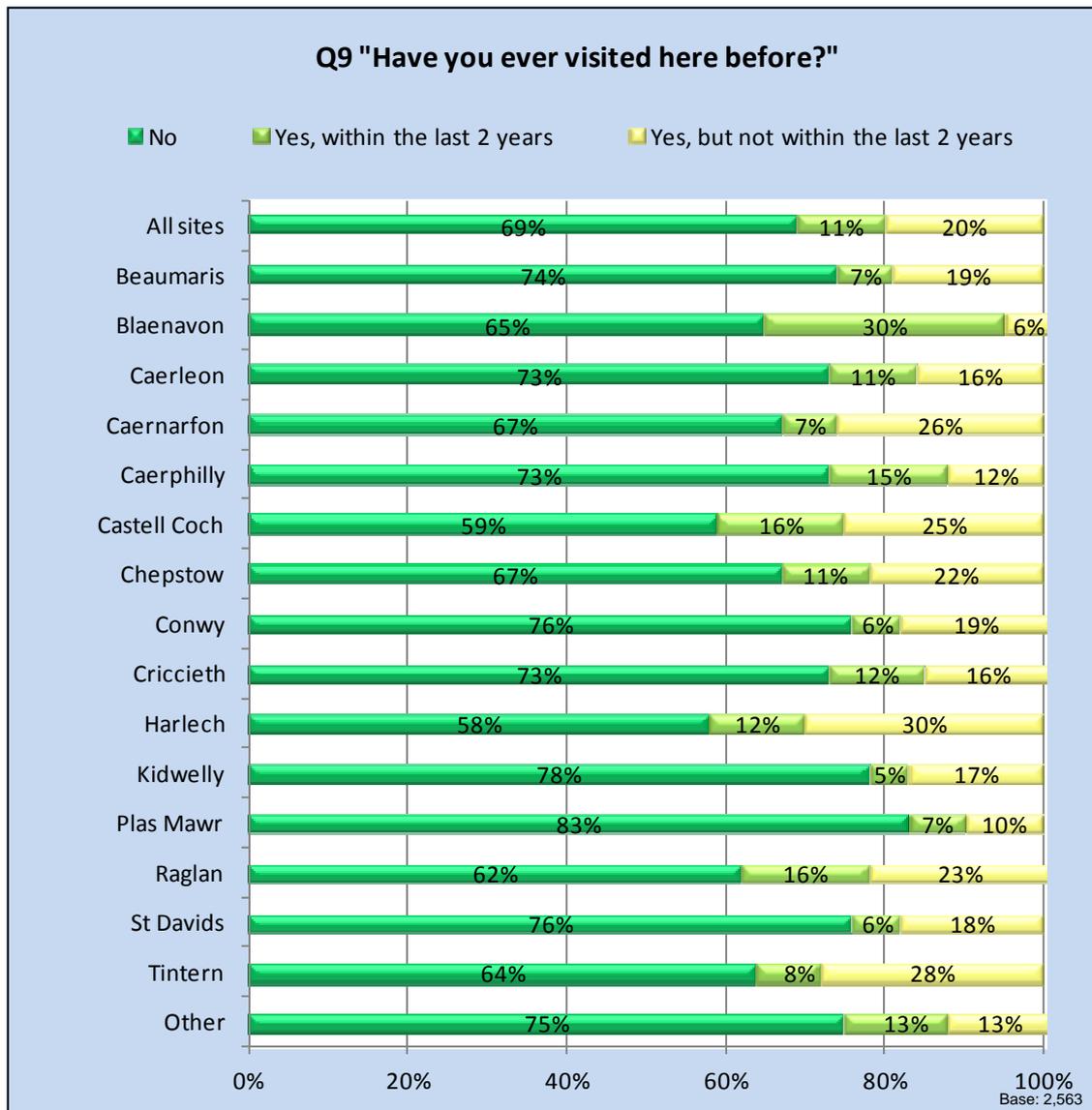
"Chance for children to explore"
Family with young children, Criccieth

"Suitable for me but not for children"
Couple, Plas Mawr

¹ This figure comes from adding together families with younger children (29%) and families with younger and older children (5%) in the cross-tabulations

² This figure comes from adding together families with older children (10%) and families with younger and older children (5%) in the cross-tabulations

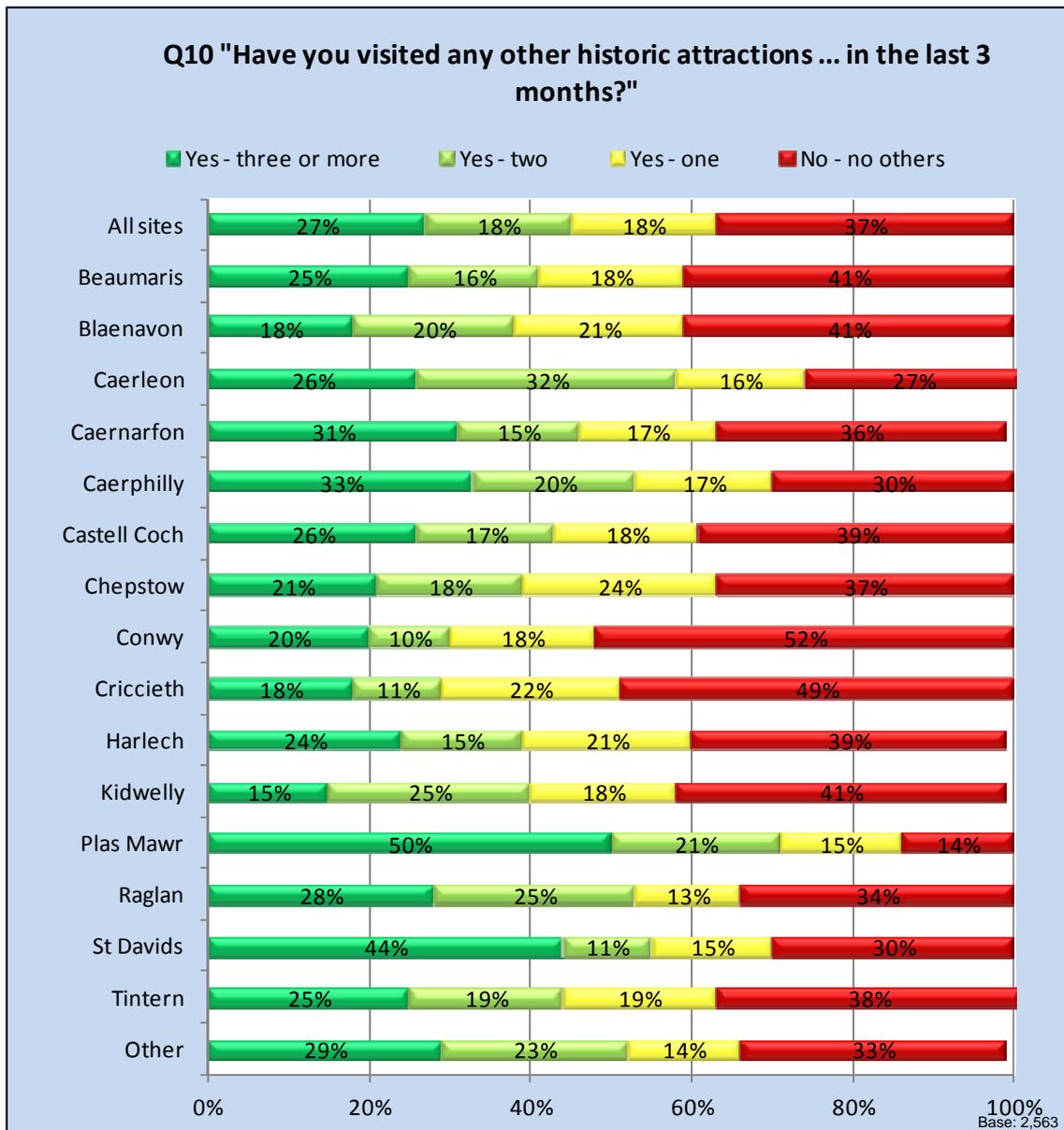
New, lapsed and repeat visitors



High proportion of new visitors to all sites

- 3.14 Attracting new visitors can require much marketing effort in a crowded market place. The majority (69%) of visitors to Cadw sites this summer have visited the site for the first time. The results are very similar to the shoulder season in 2015 and the summer in 2013.

Visiting other historic attractions



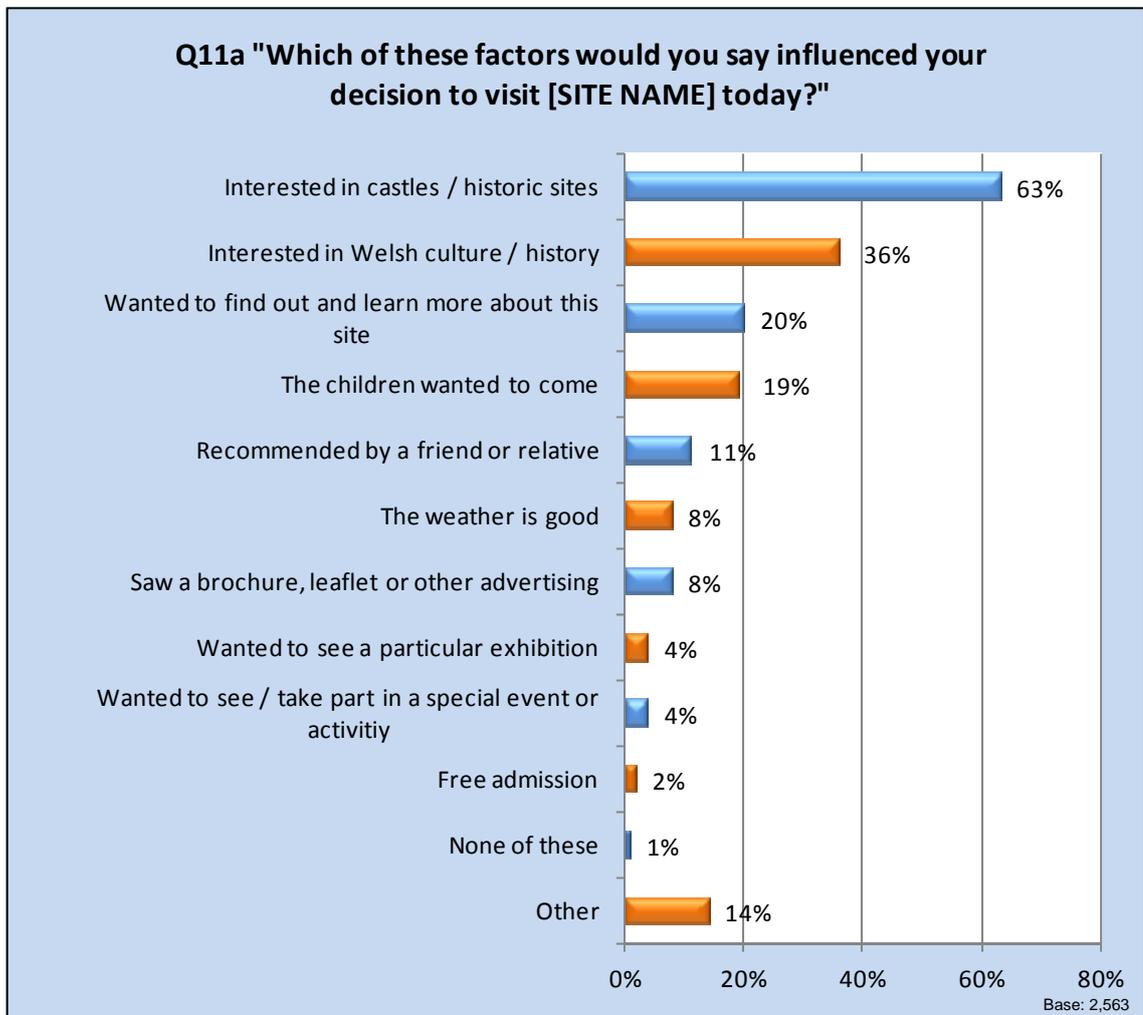
N.B. The sites listed on the above chart relate to where interviews have been conducted, not what historic attractions respondents may have visited in the last three months

More visitors getting around historic attractions in the summer months

3.15 About two thirds (63%) of Cadw visitors this summer had been to another historic attraction in the three months before their visit. This is very similar to the summer of 2013 but different to the shoulder season 2015 which followed the winter months, and therefore a much lower proportion (43%) of visitors had been to other historic attractions in the previous three months.

- 3.16 Plas Mawr stands out as a site well visited by those who visit other historic attractions regularly. Half (50%) of its visitors this summer had been to three or more other historic sites within the previous three months.

Influences on the decision to visit



Similar results to previous surveys

- 3.17 The factors which influence people to visit a Cadw site are in a very similar order to the peak season survey in 2013 and the shoulder season survey in 2015. General interest in castles / historic sites (63% of respondents) remains clearly the most frequently mentioned factor of influence.

"I love looking at the fire places and imagining how it was"
Family with young children, Raglan

Differences between sites

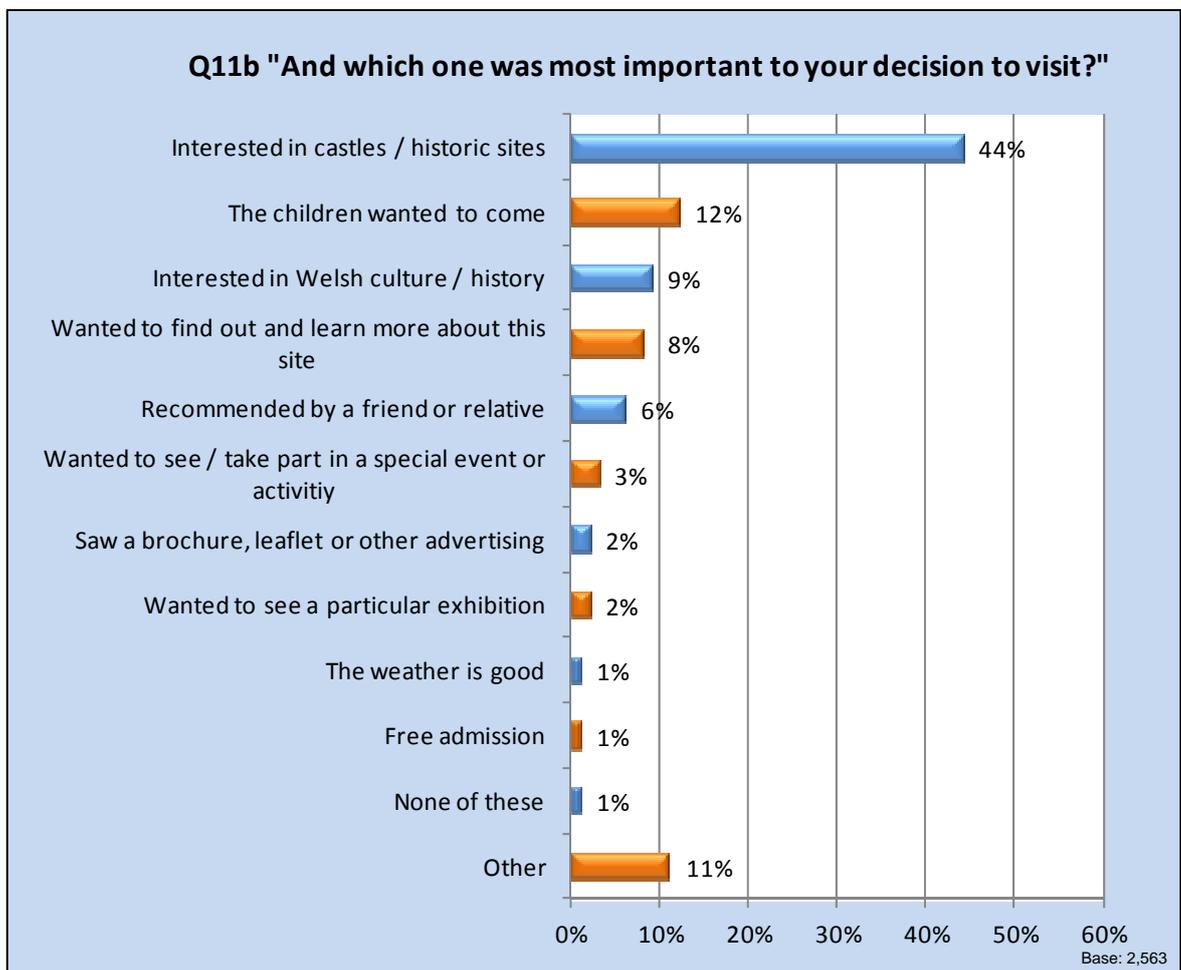
3.18 Plas Mawr has attracted a much higher proportion of visitors interested in Welsh culture/history than the other sites – 63% of its visitors.

“Domestic lives of the past”
Family without children, Plas Mawr

3.19 Visitors wanting to ‘find out and learn more about this site’ are more frequently found at Caerleon (34% of visitors), St Davids (31%) and Castell Coch (29%).

“The history of the building”
Organised group, St Davids

“It’s a proper fairy castle steeped in history”
Family with older children, Castell Coch



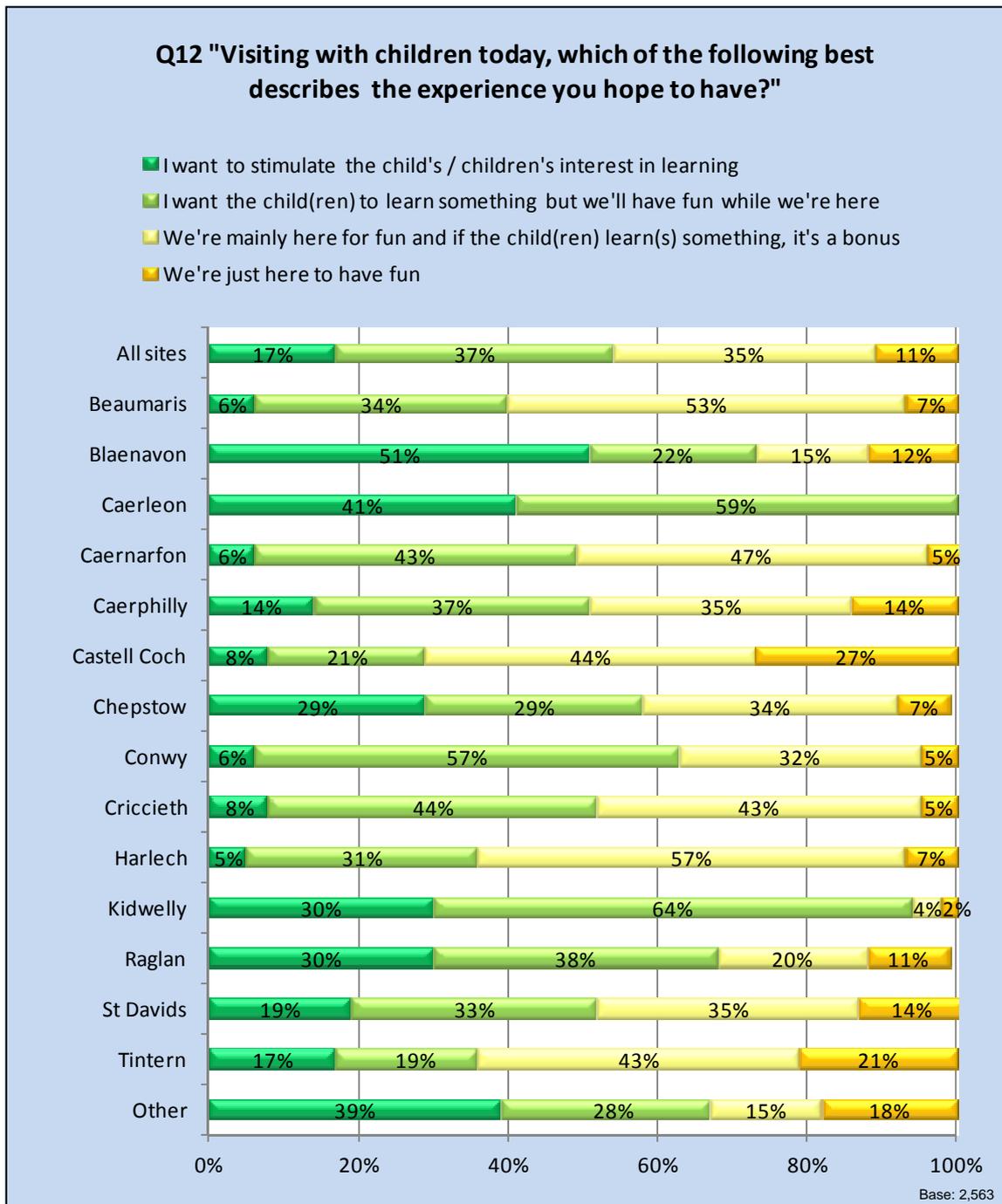
'Interest in castles / historic sites' remains the clear single most important influence on visits

- 3.20 When narrowed down to the single most important influencing factor on the decision to visit, 'interest in castles / historic sites' remains the clear single most important factor (44% of respondents), as was also the case in other recent visitor surveys.
- 3.21 There are some variations by site. Tintern Abbey has the highest proportion of visitors (20%) stating 'interested in Welsh culture/history' as the single most important influence, while the influence of children there is much lower than average (5% of parties).
- 3.22 The influence of children is highest at Kidwelly (21% of parties), Castell Coch (19%) and Caerleon (19%).

"The best thing was seeing the children enjoy it"
Family with young children, Castell Coch

"The children enjoyed going in and out of all the different rooms"
Family with younger and older children, Kidwelly

Motivation for visiting with children



Mixture of different motivations to visit with children

3.23 Parents and grandparents visiting Cadw sites with children have different motivations to visit with respect to what they want the children to gain from the visit. This ranges from stimulating the children's interest in learning to just

going for fun. Most (72%) parties visiting with children hope for a mixture of learning and fun.

- 3.24 Results vary by site. At the 'learning' extreme, all (100%) visitors to Caerleon have placed more emphasis on their children learning something than having fun. Kidwelly also stands out as a site where most (94%) visitors place more emphasis on their children learning something.

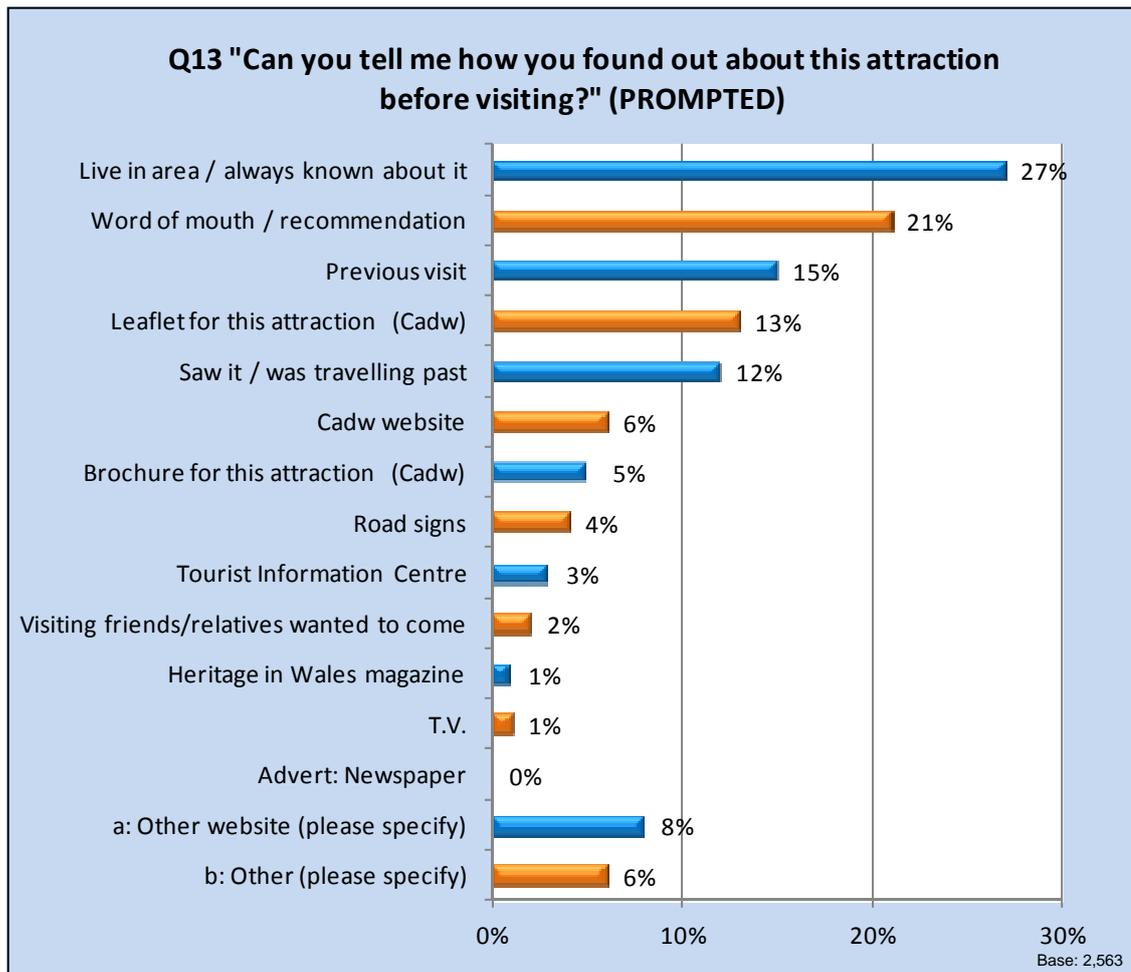
"Interactive – kids can touch and learn"
Family with young children, Caerleon

- 3.25 At the 'fun' extreme, Castell Coch stands out, with the majority (71%) of visiting parents and grandparents placing more emphasis on their children having fun than learning something. Likewise, about two thirds (64%) of visitors with children to Tintern Abbey place more emphasis on the fun element of the visit.

"Children liked climbing to the tower"
Family with young children, Castell Coch

"The best part was seeing the excitement on the kids' faces"
Family with young children, Castell Coch

Source of awareness



Awareness stems from a variety of sources

- 3.26 Results to Q13 above are not directly comparable with previous surveys as some of the options such as 'previous visit' and 'saw it / was travelling past' have been prompted for the first time.
- 3.27 The top two sources of awareness of the site visited – 'live in area / always known about it' (27%) and 'word of mouth' (21%) – are quite general and it is hard sometimes for respondents in a survey to pinpoint exactly how and where they first became aware of an attraction.
- 3.28 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:
- Kidwelly (10% of respondents)
 - Plas Mawr (10%)

- Caerleon (9%)
- Caerphilly (8%)

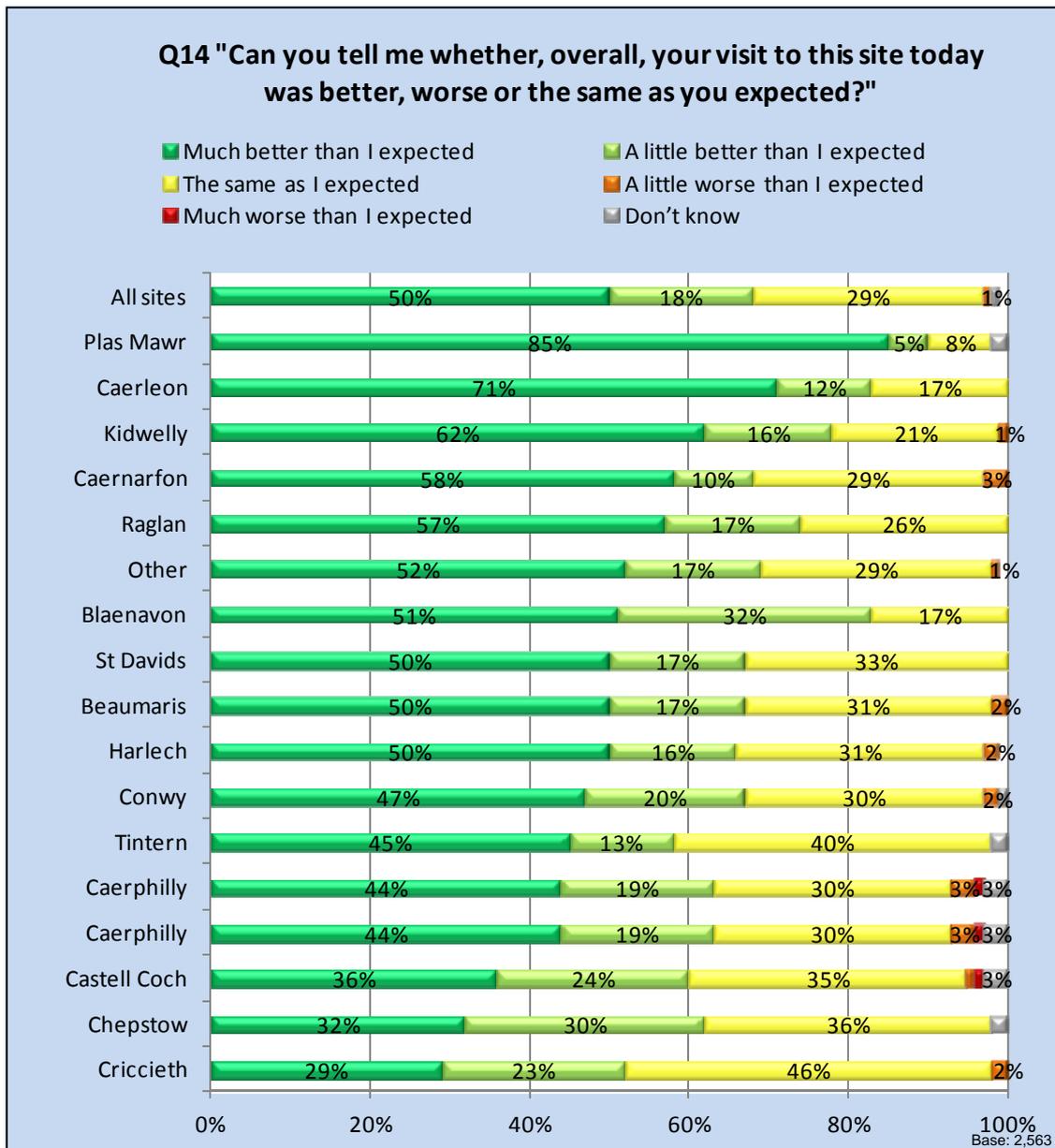
3.29 The sites where leaflets specific to the site appear to have raised the most awareness are:

- Plas Mawr (27%)
- Caerleon (16%)
- Criccieth (15%)
- Harlech (15%)
- Beaumaris (15%)

3.30 Four of these top five sites for leaflet awareness are in North Wales.

3.31 Overall, awareness raised through leaflets (13% of visitors) is higher than in the shoulder season (7%), while awareness raised through the website (6%) is slightly lower than in the shoulder season (9%). Perhaps this might be a reflection on the higher proportion of staying holidaymakers in the summer travelling shorter distances on the day and picking up leaflets while staying in the local area.

Experience compared to expectations



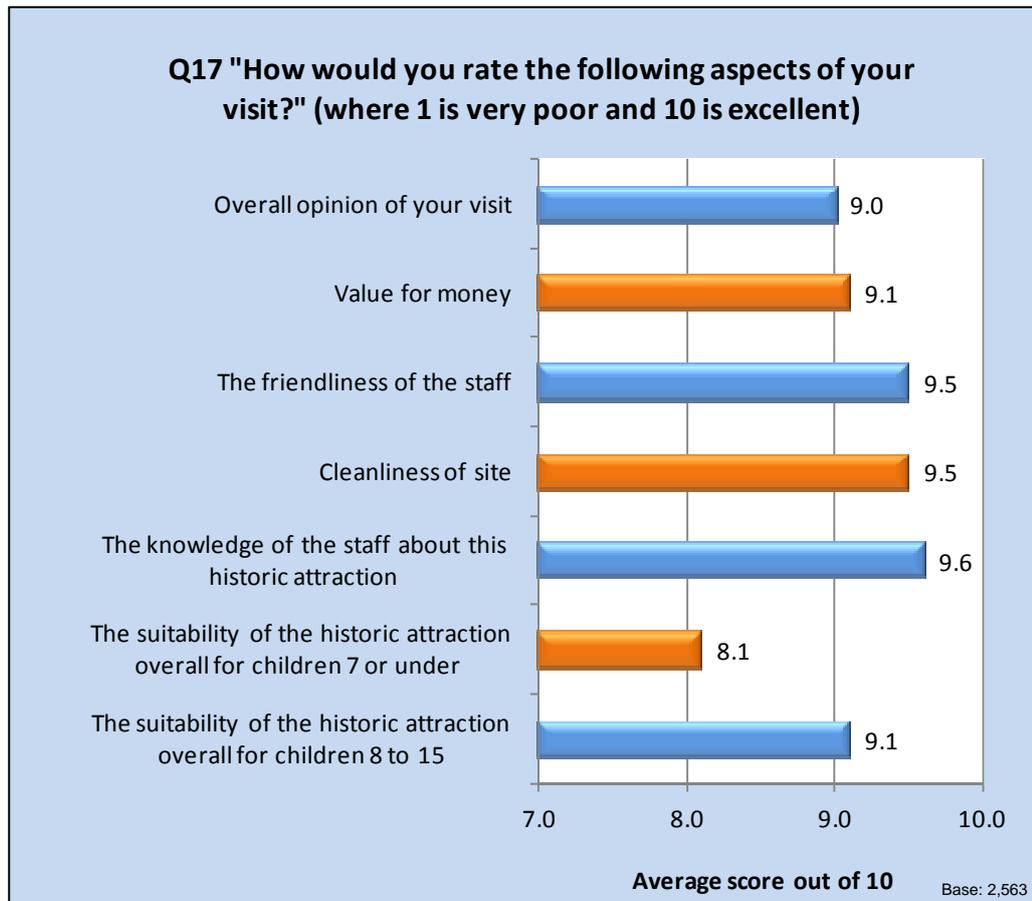
Significant exceeding of expectations

- 3.32 Visitors to Cadw sites are often very pleasantly surprised by their experience. Half (50%) of visitors describe their experience as 'much better' than they expected.
- 3.33 Plas Mawr appears to offer the most surprising experience, with the vast majority (85%) of its visitors describing their visit as 'much better' than expected.

It's not just new visitors whose expectations are exceeded

- 3.34 Results differ according to whether a respondent has visited the site before; nevertheless it is not just the new visitors who are taken by surprise. A sizeable proportion (28%) of those who had visited previously within the last two years describe their visit as 'much better' than expected. About two in five (39%) of those who had visited previously but not within the last two years describe their visit as 'much better' than expected.

Rating different aspects of the experience



Overall high satisfaction maintained

- 3.35 Overall visitor satisfaction averages a high 9.0 out of 10. This is the same result as in the shoulder season 2015 and the summer season 2013.
- 3.36 The top four rated sites in terms of overall satisfaction are Plas Mawr (9.5), Caerleon (9.4), Tintern (9.4) and Blaenavon (9.3).
- 3.37 At Plas Mawr, visitors comment openly about the quality of the audio guide, the room layouts (in particular the kitchen) and furnishings.

"Loved the attention to detail"
Lone visitor, Plas Mawr

"The audio information – could do it in our own time"
Couple, Plas Mawr

"The kitchen was the most enjoyable part"
Couple, Plas Mawr

- 3.38 Visitors to Caerleon are enthusiastic about the special lighting effects in the pool, and learning about the history generally.

"Roman baths – light projections"
Family with younger children, Caerleon

"Amazing, love the swimmers and the music. Great attraction."
Couple, Caerleon

"So full of history and information"
Friends, Caerleon

- 3.39 Visitors to Tintern Abbey are taken by the scale of the Abbey and the opportunity to walk round it in peace, imagining what it used to be like. Some even comment on being in awe of it.

"So wonderful to see. It's a great ruin with history. I'm in awe of it."
Couple, Tintern Abbey

"We all love this place. It's the greatest place I've been to – the history, beauty and scenery. Can't beat it anywhere."
Organised group, Tintern Abbey

"Being able to walk through the place. You can be a part of it."
Friends, Tintern Abbey

- 3.40 Visitors to Blaenavon enjoy re-enactments, sound effects and the cottages. They enjoy learning about the history in this way and seeing how people lived.

"The memories it brings back to 1947"
Lone visitor, Blaenavon

"The enactment and the way everyone is dressed"
Family with older children, Blaenavon

"Seeing the cottages and how people lived"
Couple, Blaenavon

Staff remain very highly rated

- 3.41 Cadw staff are rated very highly again. The average 'knowledge of staff' rating is 9.6 and 'friendliness of staff' rating is 9.5. The ratings are very high across the sites.

"The staff are very helpful"
Couple, Raglan

"The staff are very knowledgeable"
Couple, Strata Florida

"The staff are brilliant"
Family with older children, Plas Mawr

Value for money

- 3.42 Value for money is a very important aspect of a visit, and this rates highly at 9.1 on average. There are some differences by site however. The highest ratings are at Plas Mawr, Caerleon and Blaenavon (all 9.7).

"Amazing place. So well kept and restored."
Couple, Caerleon

- 3.43 The lowest ratings are at Chepstow (8.5) and Conwy (8.8) – the only two sites to average less than 9 out of 10.

"It's expensive to enter"
Couple, Chepstow

Suitability for children

- 3.44 The only weakness in the ratings remains 'suitability for children 7 or under' (8.1). Ratings vary considerably by site. On the positive side, Caerleon (9.1 average), Blaenavon (8.9), Chepstow (8.8) and Raglan (8.8) all rate highly.

- 3.45 In the case of Caerleon and Blaenavon, it seems that the suitability for children is good because of the interactive elements and the entertainment. At Chepstow and Raglan it is more about young children having lots of space to run around safely.

"Kids love it, great fun. Loved the battle. Really good day out."
Family with young children, Blaenavon

"Good interaction for kids"
Family and friends, Caerleon

"It's great for kids, so interesting. They can feel and touch."
Family with young children, Caerleon

"Children have space to run around"
Family with young children, Chepstow

"Freedom for children to run around"
Family with young children, Raglan

- 3.46 At the other end of the scale there are issues with the perceived suitability for young children at Plas Mawr (6.7), Caernarfon (7.3), St Davids (7.3) and Harlech (7.4).

- 3.47 At Plas Mawr and St Davids this seems to be because the attractions are just considered to be more interesting for adults.

- 3.48 At Caernarfon Castle and Harlech Castle the issue is not that they are not interesting for children, but that they are not considered safe for walking children (staircases) or easy to navigate with a pushchair. Unfortunately castles were not built with pushchair access a top priority; nevertheless, child-friendliness such as baby-changing facilities could be improved.

“Spiral stairs with little kids”

Family with younger and older children, Caernarfon

“Hard when one child in a buggy”

Family with young children, Caernarfon

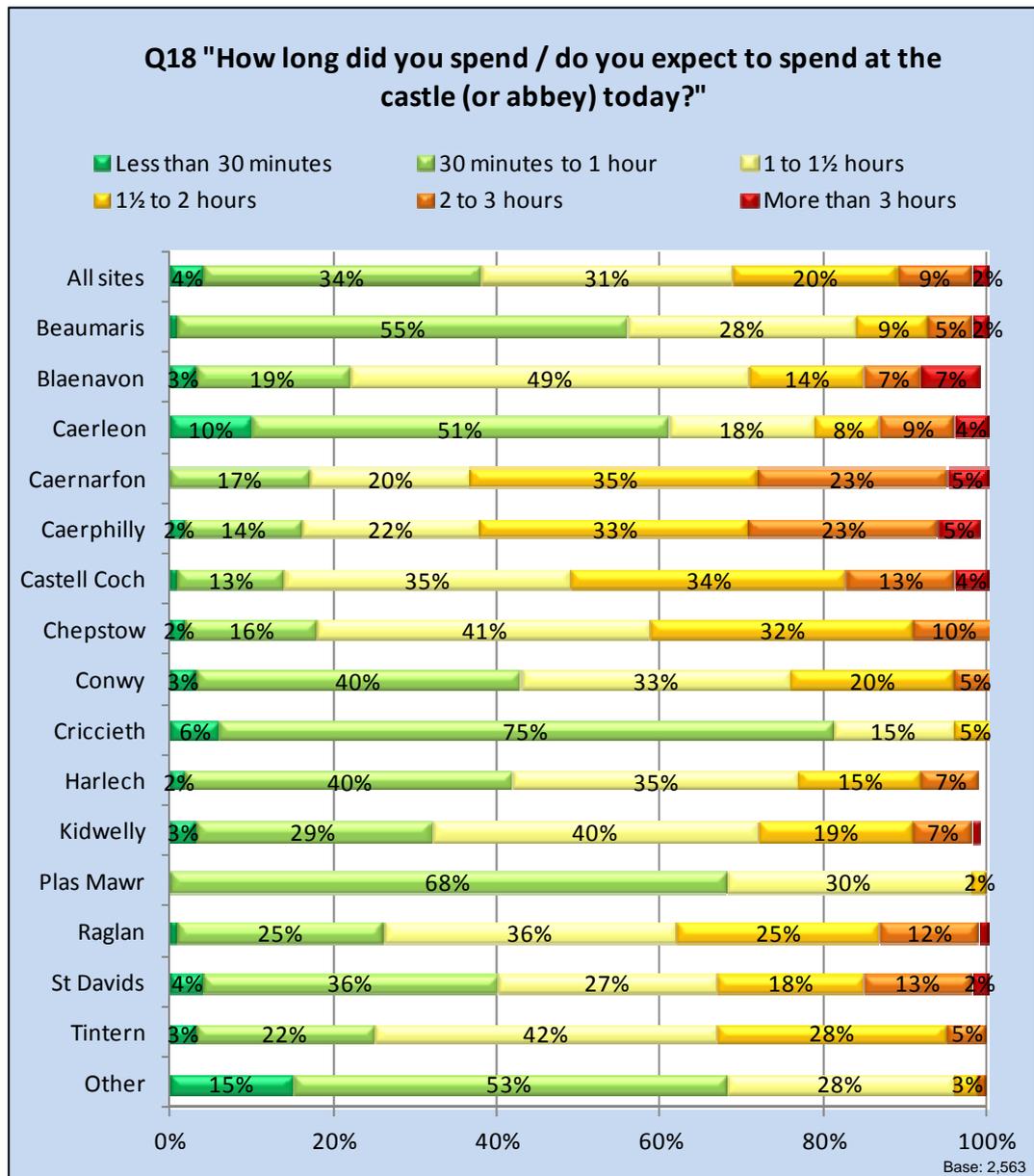
“Safety for kids”

Family with younger and older children, Harlech

“Baby-changing facilities not available”

Family with young children, Caernarfon

Length of time spent at the attraction

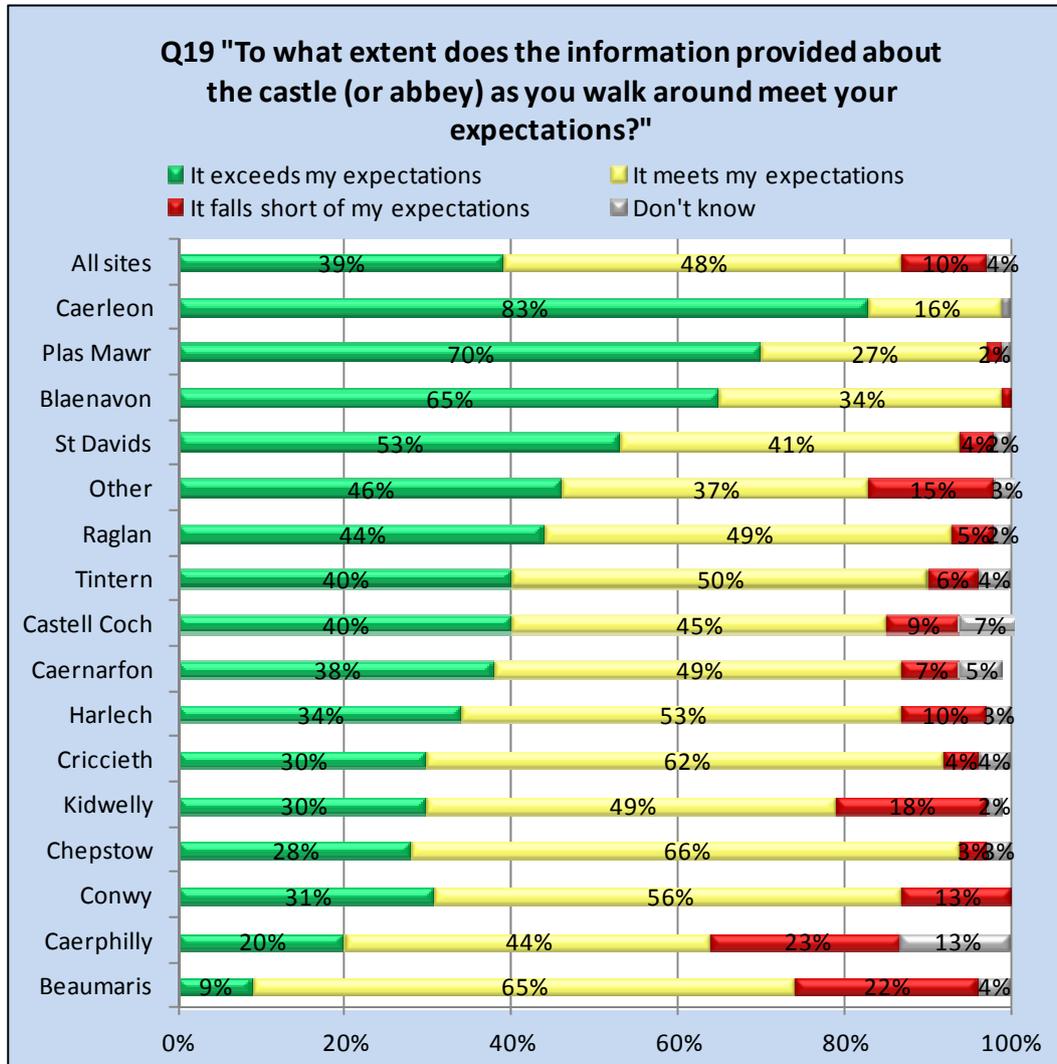


Longer dwell times at sites with improved interpretation

- 3.49 The overall average dwell time at Cadw sites in the summer of 2015 is approximately 1.3 hours; this compares to 1.1 hours in the more chilly shoulder season and 1.5 hours in the 2014 peak season.
- 3.50 Caerphilly Castle (1.7 hours average dwell time), Caernarfon Castle (1.7 hours) and Castell Coch (1.6 hours) stand out as having the longest average dwell times. All three sites have had improved interpretation. The average

dwel time at sites with improved interpretation is approximately 1.5 hours – this is longer than at sites without improved interpretation (1.2 hours).

Information expectations – are they met?



Base: 2,563

Surprising results again for sites with improved interpretation

3.51 The information provided at Cadw attractions generally meets or exceeds expectations (87% of respondents). However, sites with improved interpretation (Conwy, Caerphilly, Castell Coch, Caernarfon and Harlech) do not fare better than sites without improved interpretation. This echoes the results in the shoulder season survey in 2015.

Visitors to Caerleon impressed with the interactive information

- 3.52 Caerleon scores very highly, with most (83%) visitors saying the information exceeded their expectations. Visitors comment on the quality of the interactive information suitable for all ages and the way that the information is clearly laid out.

"The interactive screens"
Couple, Caerleon

"Information everywhere. You can feel it all around you."
Couple, Caerleon

"The indoors is so impressive. A lot of information. The best site I've been to."
Couple, Caerleon

"So informative and I love all the talking boards"
Friends, Caerleon

'All you need to know' at Blaenavon

- 3.53 The information provided at Blaenavon also exceeds the expectations of the majority (65%) of visitors. Visitors comment that that information gives them all they need to know. Many also comment on the sound effects.

"It made it come to life"
Family with young children, Blaenavon

"Has lots of different ways to learn about this – all we need and can ask if we want more"
Family with older children, Blaenavon

"Great sound effects"
Couple, Blaenavon

Excellent audio guide at Plas Mawr

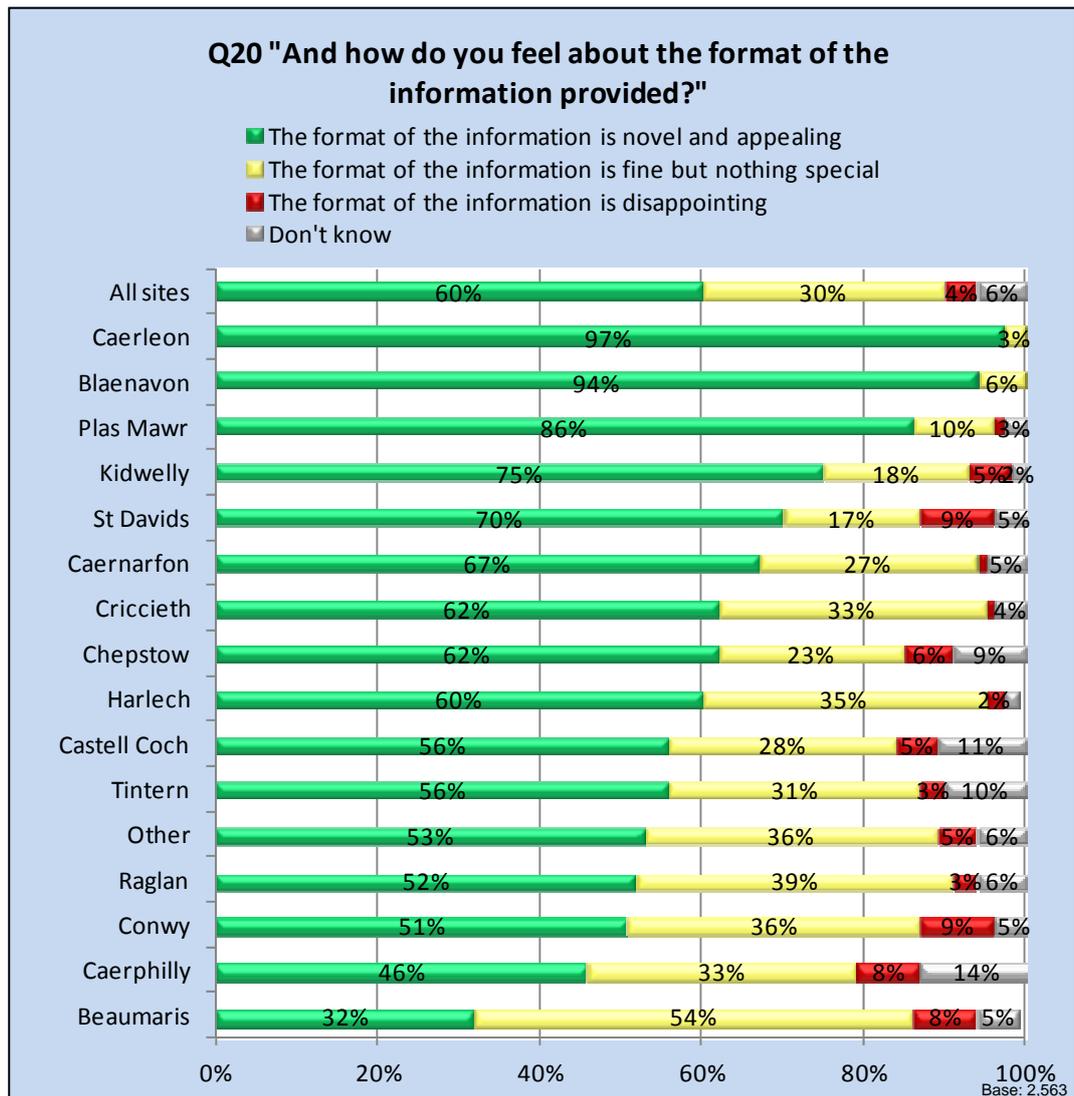
- 3.54 The main reason for the information exceeding so many expectations at Plas Mawr is the quality of the audio guide – it is very informative, easy to follow, contains good humour and brings the attraction to life. Some overseas visitors also appreciate the floor plans being in their own language.

"Really enjoyed the audio guide"
Lone visitor, Plas Mawr

"Humorous and informative"
Couple, Plas Mawr

"Japanese floor plan"
Couple, Plas Mawr

Information format



Novel format, but not more so at sites with improved interpretation

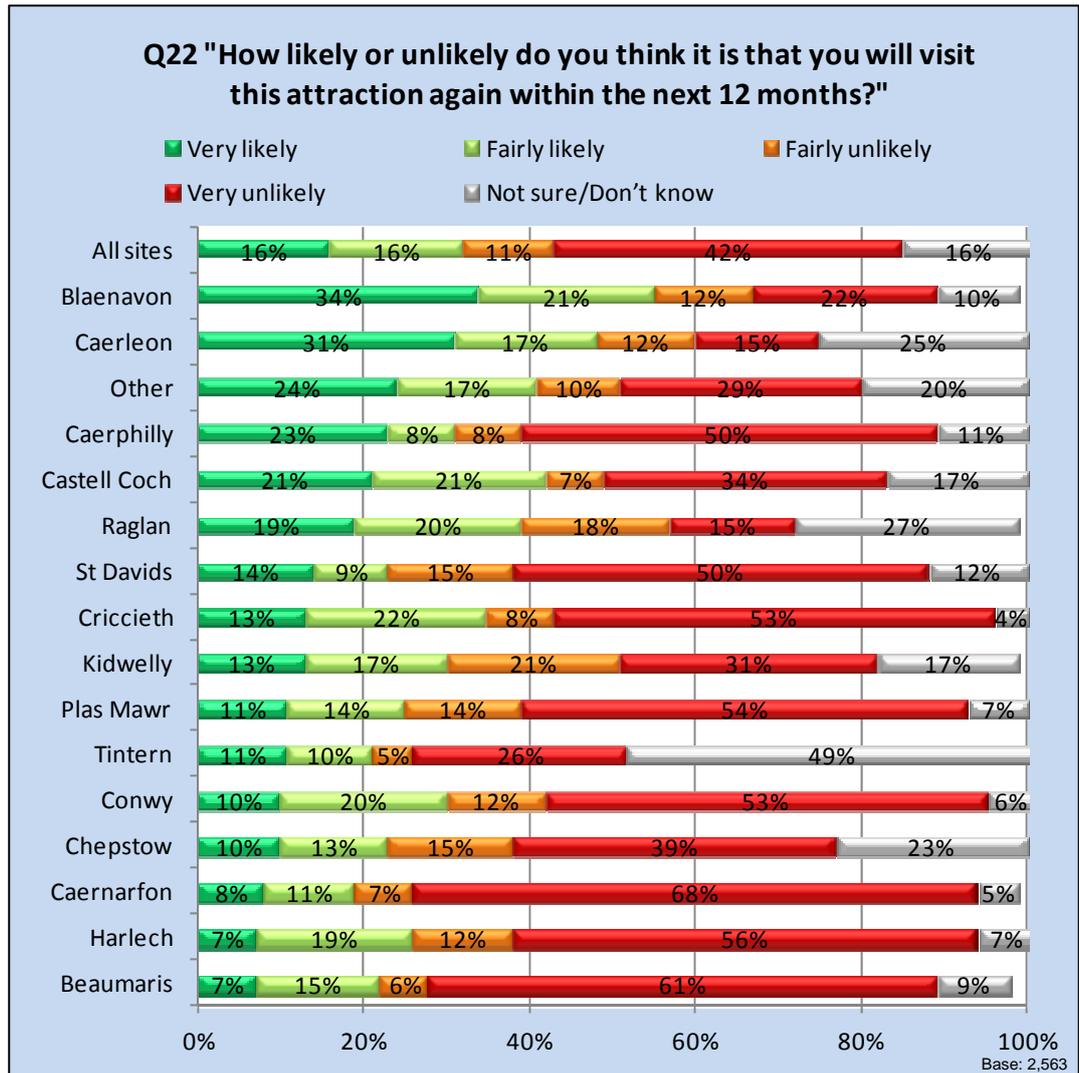
- 3.55 Three in five (60%) visitors say the format of information at the attraction is 'novel and appealing'. This is the same result as in the shoulder season survey in 2015.
- 3.56 However, as was also the case in the shoulder season survey, sites with improved interpretation (Conwy, Caerphilly, Castell Coch, Caernarfon and Harlech) do not fare better than sites without improved interpretation.
- 3.57 Caerleon fares extremely well again, as it did in the shoulder season survey, with nearly all (97%) of its visitors saying the information is novel and appealing. Blaenavon and Plas Mawr also fare extremely well.

"Excellent audio guide with options"
Couple, Plas Mawr

"Very appealing [information] for all ages"
Family with young children, Caerleon

"All you want to know is here"
Friends, Blaenavon

Likelihood of returning



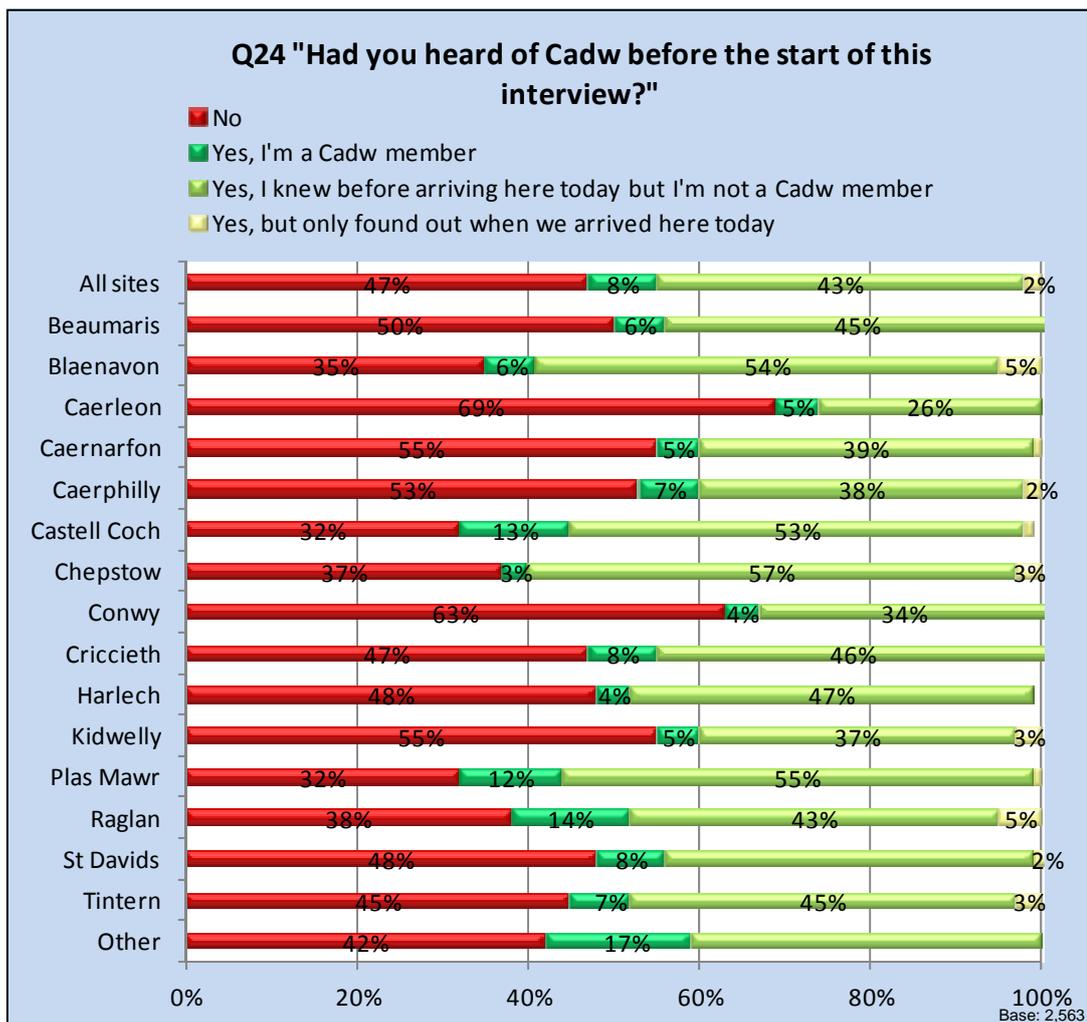
Likelihood of revisiting soon varies considerably by type of visitor

3.58 As many (68%) visitors are holidaymakers, the likelihood of returning to the same attraction within 12 months probably depends on them taking another

holiday in the same area in that time if they live too far away to take a day trip. More than half (57%) of day trippers are likely to return to the same attraction within 12 months, compared to a much lower proportion (22%) of holidaymakers. This is similar to the 2013 summer results.

- 3.59 This difference between visitor profiles explains why sites in South East Wales mostly feature at the top of the above chart (they have the highest proportions of day trippers), and why North Wales sites have high proportions of respondents 'very unlikely' to visit again within 12 months.

Awareness of Cadw



Same awareness of Cadw as in 2013

- 3.60 About half (51%) of respondents were aware of Cadw before arriving at the attraction. This is more or less the same as the 2013 survey result (50%).

4. Conclusions and Implications for Cadw

- 4.1 Here we conclude with conclusions from the research and the implications for Cadw.

Differences in visitor profile

North and SE Wales have a different balance of markets in the summer

- 4.2 At North Wales sites and at St Davids in Pembrokeshire, most summer visitors are holidaymakers. In contrast, SE Wales sites attract a mix of holidaymakers and day-trippers. This has implications for how and where to promote Cadw attractions in different regions of Wales.
- 4.3 Visitors to North Wales sites generally travel shorter journeys to get there because they have already done their 'long journey' in getting to their accommodation in the area. They are more likely to be influenced by leaflets than visitors to SE Wales sites. Although asking respondents where they picked up their leaflet was beyond the scope of this research, the 2013 *Information Needs Research* for Cadw and Visit Wales revealed that picking up leaflets in the accommodation remains a very important source of awareness of visitor attractions to holidaymakers in Wales.
- 4.4 South East Wales sites attract a more balanced mix of holidaymakers and day-trippers. Day-trippers generally travel further than holidaymakers, and so there is more scope for SE Wales sites casting a 'wider net' with offline materials.

Visit expectations and satisfaction

What could be putting people off visiting?

- 4.5 Once again, the visitor satisfaction ratings have come out very high and so too have the experiences compared to prior expectations. It begs the question, what do people expect to experience at Cadw sites?
- 4.6 Understanding this could be very important to removing barriers in the minds of non-visitors, as they could well be misunderstanding the experience and not visiting as a result. Further research is needed on this.

The staff

Very highly rated again

- 4.7 Staff at Cadw sites are very highly rated again, both in terms of friendliness and knowledge of their site. This would be worth feeding back to them.

Children

Suitability for under 8s?

- 4.8 Families with young children remain well represented in the visitor profile but the perceived suitability of Cadw attractions for children under 8 remains a slight weakness at some sites.

Differences in the experience hoped for

- 4.9 The hopes of parents or grandparents visiting with children differ significantly by site, and this should be borne in mind when developing the offering and promoting individual sites. Visitors to Caerleon and Kidwelly in particular are hoping for their children to learn, whereas at the other extreme, the hope at Castell Coch is much more about fun.

Improved interpretation

Worthwhile investment for other sites?

- 4.10 As was the case in the shoulder season survey, sites with improved interpretation have longer average dwell times than sites without it. However, they do not fare better in terms of the information exceeding expectations or being novel and appealing.
- 4.11 Caerleon has fared extremely well in this survey again, as have Plas Mawr and Blaenavon. It would be worth considering what could be learnt from the interpretation and staff there to replicate at other sites.