



REPORT

Summer Season Visitor Survey 2018

Cadw



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## 1. Headline Findings

### Experiences continue to outperform expectations

About two in five (39%) visitors describe their experience to a Cadw site as 'much better than expected', and a further quarter (24%) describe it as 'a little better than expected'. Only a small minority (2%) end up disappointed.

Caerleon continues to surprise visitors greatly, with most (82%) describing the experience as 'much better than expected'. Raglan (65% say much better than expected) also surprises visitors.

### Overall satisfaction remains very high

Visitors to Cadw sites rate their experience 9.3 out of 10 on average. All sites average at least 9.0 out of 10. 'Friendliness' and 'knowledge' of staff both average 9.5 – all sites average at least 9.0 on both aspects.

### Suitability for children

'Suitability for children aged 8 to 15' scores well (9.3), but 'suitability for children aged 0 to 7' (8.7 average) is still an area for improvement. All sites except Caerleon (9.7) and Raglan (9.5) average less than 9.

### Longer dwell times

The average dwell time at Cadw sites is approximately 1.6 hours – an increase from 1.3 hours in summer 2015. The longest av. dwell times are at Caernarfon (2.1 hours) and Caerphilly (1.9 hours).

### Visitor profile remains unchanged

The visitor profile to Cadw sites by gender, age, residency, SEG and ethnic group remains unchanged from summer 2015.

### Guidebook A preferred for design and value

Of the three guidebooks shown, guidebook A (large & thick – £4.95) is preferred by 48% of visitors for design and by 53% of visitors for value for money. It is the preferred choice for design and value among every party type and visitor origin. Some visitors say its richness in information makes it a good keepsake.

### Guidebook C preferred for size

Guidebook C (small & folds out – £2.50) is preferred by 44% of visitors for size. Families with young children like it in particular because they already have to carry around a lot of 'stuff'.

Guidebook B (large & thin – £3.50) is the least preferred on every aspect (design, size, value) by all visitor types and origins.

### Caerphilly

Interviews at Caerphilly have straddled work on new attractions completed in mid August. Significant differences in results before and after the new attractions are:

- 43% describe their experience as 'much better' than expected after the work (compared to 27% before)
- 69% describe the information as 'novel and appealing' after the work (compared to 55% before)

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

**Informing marketing strategy** Cadw wished to understand the profile of its visitors and their experience at Cadw sites in order to inform future marketing strategy.

**Building on previous research** Cadw also conducted visitor surveys in the summer season of 2015 and the shoulder season of 2018. This report makes comparisons with both surveys throughout, where differences are significant.

**Face-to-face interviews** We have conducted 3,075 interviews at 20 Cadw sites during the school summer holidays in 2018 using a questionnaire based on previous Cadw surveys. The sample structure by site is shown below:

Site	No. of interviews
Beaumaris	232
Blaenavon	123
Caerleon	150
Caernarfon	352
Caerphilly	388
Castell Coch	164
Chepstow	178
Conwy	325
Criccieth	141
Denbigh	30
Harlech	204
Kidwelly	124
Plas Mawr	41
Raglan	208
Rhuddlan	69
Strata Florida	31
St Davids	44
Tintern Abbey	193
Tretower	46
Valle Crucis	32
<b>Total</b>	<b>3,075</b>

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**Analysis structure**

On all charts we show overall results because the chart would be too busy and incomprehensible if broken down by site. We highlight differences between sites in the text throughout and we have also produced accompanying cross-tabulations where all results to questions with quantifiable answers can be viewed by site.

When making comparisons by site in this report, we keep to sites with more than 100 interviews. The results for smaller sites can be viewed in the file 'cross tabs by site small'.

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## 3. Results

### Visitor Profile

Profile	2018 (summer season)	2018 (shoulder season)	2015 (summer season)
<b>Gender</b>			
Male	47%	50%	50%
Female	53%	50%	50%
<b>Age</b>			
0 – 7	11%		12%
8 – 15	14%		13%
16 – 24	10%		7%
25 – 34	11%	<i>Question not comparable</i>	11%
35 – 44	16%		17%
45 – 54	12%		15%
55 – 64	11%		11%
65+	15%		14%
<b>SEG</b>			
AB	43%	44%	39%
C1	36%	37%	38%
C2	14%	13%	15%
DE	7%	6%	8%
<b>Where resident</b>			
Wales	27%	33%	25%
UK outside Wales	54%	54%	56%
Overseas	19%	13%	19%
<b>Ethnicity</b>			
White	97%	95%	96%
Other	3%	5%	4%

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

#### High proportion of non-Welsh visitors in the peak season

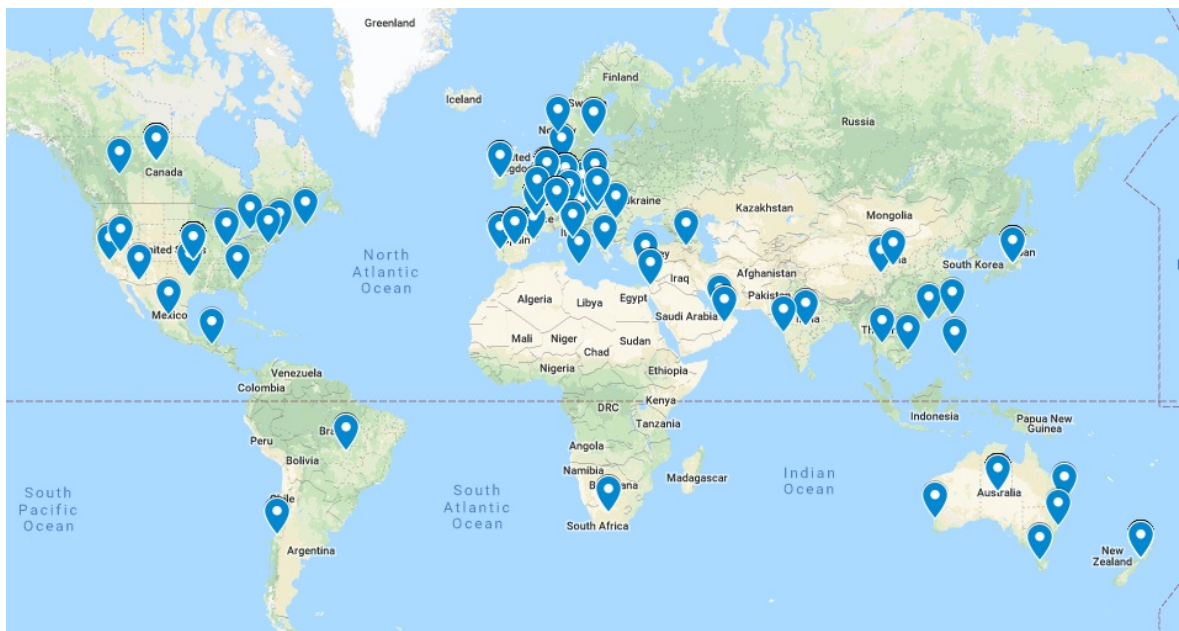
- 3.1 UK and overseas visitor numbers to Wales are greater in the summer season, which is reflected in the visitor residency profiles at Cadw sites – 73% of visitors come from outside Wales. There are no significant differences in visitor profile between summer 2015 and summer 2018.

3.2 The map below shows where the UK visitors come from:



3.3 Similar to the shoulder season, most parts of England and Wales are well represented by visitors at Cadw sites, but North East England, Scotland and Northern Ireland are less represented.

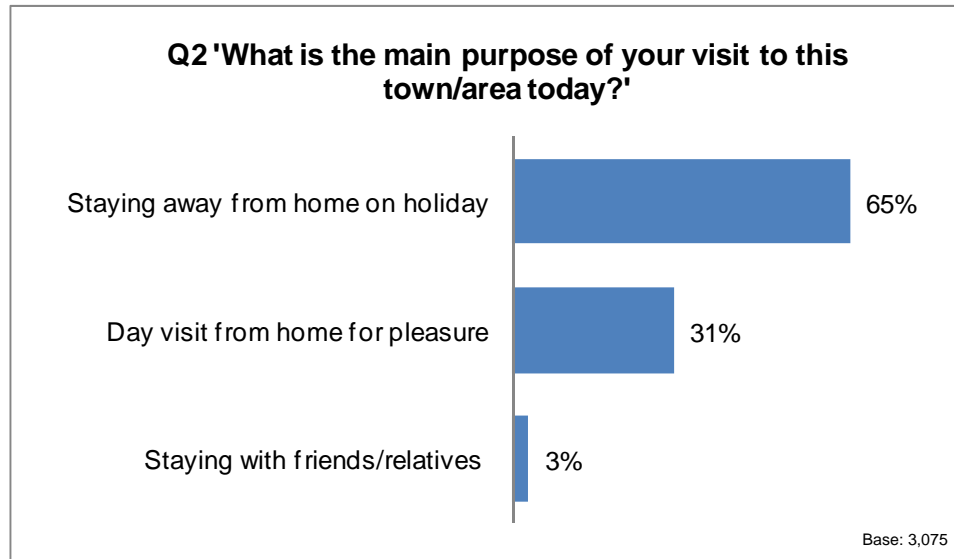
3.4 The map below shows where the overseas visitors come from:



3.5 Overseas visitors have increased in proportion from the shoulder season to about a fifth (19%), which is the same proportion as summer 2015. Again, every continent is represented, but with most overseas visitors travelling from Europe.



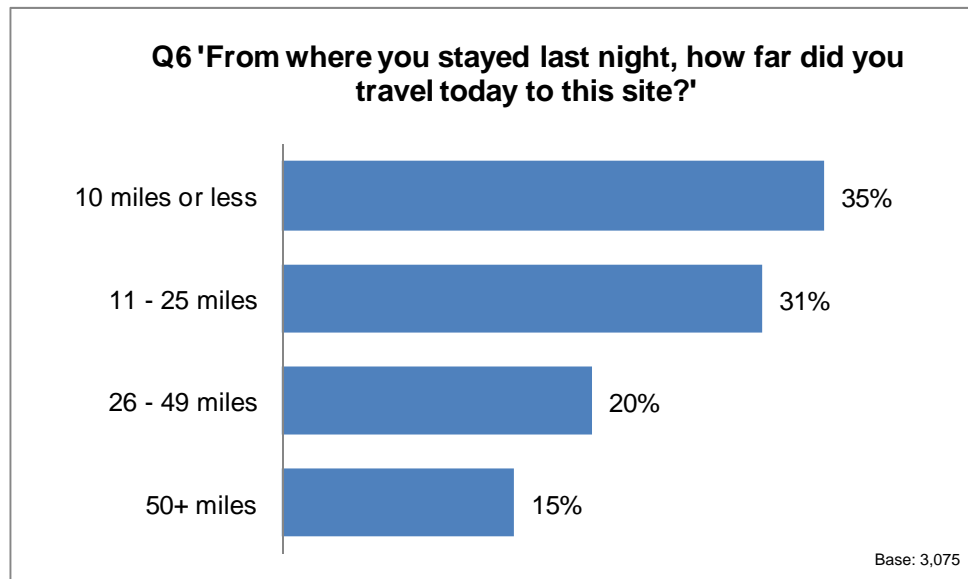
## Main purpose of visit to the area



### Castles continue to attract holidaymakers

- 3.6 About two thirds (65%) of visitors to all sites say the main purpose for their visit is holidaying away from home. This is a slight increase from the shoulder season, where 60% of visits were made by holidaymakers.
- 3.7 The Northern sites remain popular days out for tourists in those areas. Harlech Castle (Snowdonia), Criccieth Castle, Caernarfon Castle (both close to Snowdonia) and Beaumaris Castle (Anglesey) have all seen large proportions of holidaymakers (above 80%) making up their summer visitors.
- 3.8 Meanwhile, sites in the South East region attract around half of their visitors from those on day visits from home. This is similar to the trends seen in the shoulder season.
- 3.9 For some of these sites however, there has been an increase in day visitors compared to previous years. In particular, Chepstow Castle has seen a steady increase from 40% in summer 2015 to 55% this peak season.

## Distance travelled to the site



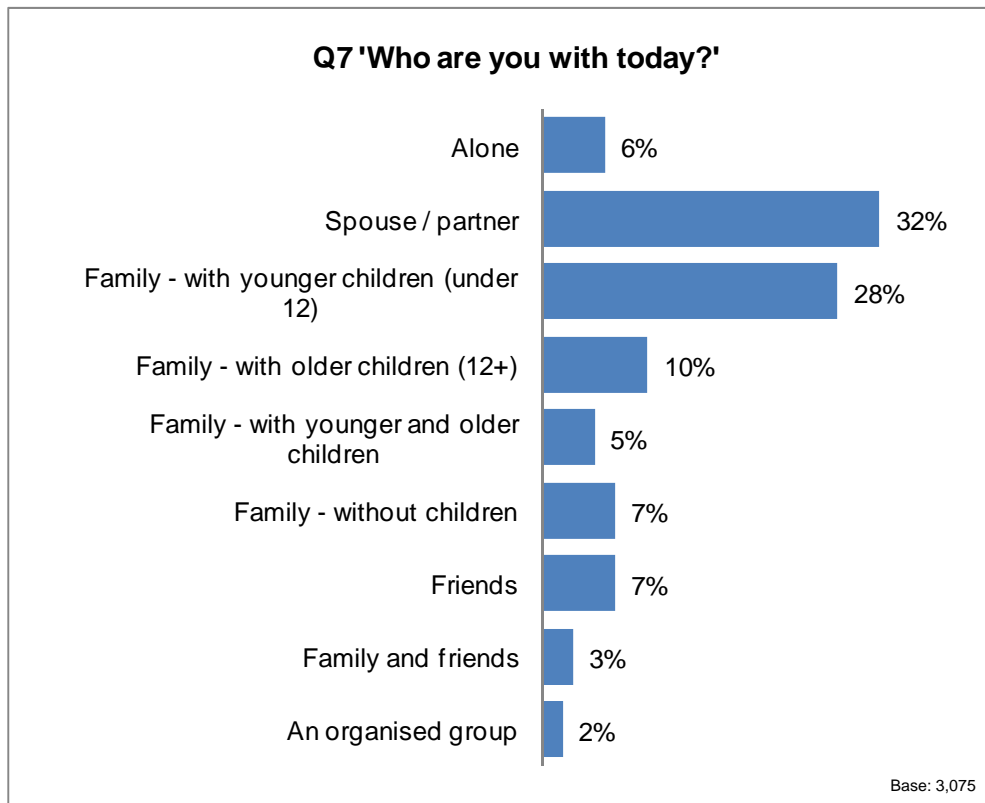
### Change in distances travelled to Conwy Castle

- 3.10 During the summer season in 2015 and in the off-peak season this year, Conwy Castle was attracting the most visitors travelling 50+ miles to get there (a third of respondents in both seasons). However, this season it has dropped to around a fifth (19%).
- 3.11 This season, Caerleon has attracted the most visitors travelling from afar, with about a quarter (27%) of visitors travelling 50+ miles to come and visit.

### Regional shift in sites seeing their visitors travelling shorter distances

- 3.12 Harlech Castle has seen a significant shift in visitors travelling 10 miles or less (45% – compared to 30% in the shoulder season).
- 3.13 In South East Wales, Castell Coch has seen a significant decrease in the closest travellers (39% from 48%) since the shoulder season, and likewise Caerphilly Castle (30%, down from 40%).

## Type of party



### Broad spread of party types

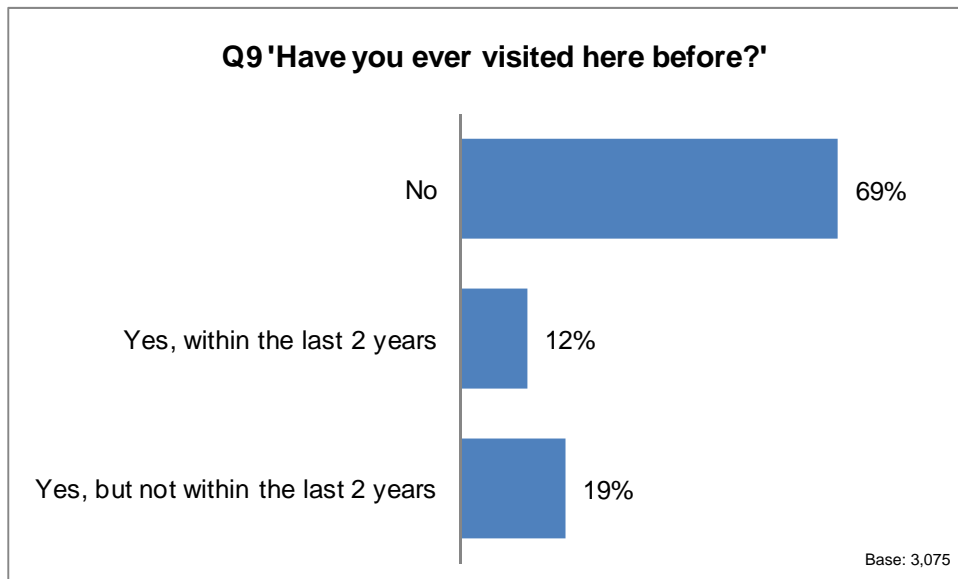
- 3.14 Cadw sites have a broad appeal and this is reflected in the spread of visiting party types.
- 3.15 Families with younger children (33% of parties)<sup>1</sup> outweigh families with older children (15% of parties) significantly. This might imply that Cadw sites' appeal is perceived to be more for younger than older children, but later results in Q16 suggest that is not the case. The difference in profile might reflect how many teenagers really want to go on days out with their parents.

### Caerphilly and Beaumaris have attracted the highest proportions of families with young children

- 3.16 Close to half (45%) of parties visiting Caerphilly Castle and Beaumaris Castle are families with young children. For Beaumaris, this is a significant change in party types since the shoulder season, when about a third (35%) of visitors were couples.
- 3.17 Tintern Abbey has attracted the highest proportion of couples (45% of parties). This is similar to the off-peak season (44%) and in summer 2015 (42%).

<sup>1</sup> This figure comes from adding together families with younger children (28%) and families with younger and older children (5%)

## Previous visits



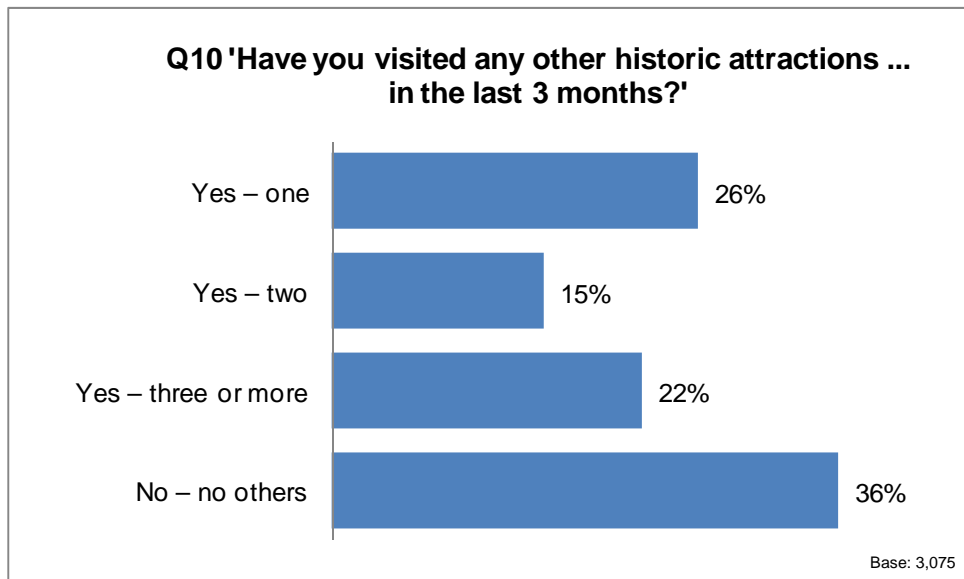
### High proportion of new visitors to all sites

3.18 About two thirds (69%) of overall visitors to Cadw sites are first time visitors, and this is no different to summer 2015. This is likely to reflect the high volume of holidaymakers visiting the sites at this time of year.

3.19 The sites attracting the highest proportions of new visitors are:

- Criccieth Castle (81%)
- Raglan Castle (75%)
- Harlech Castle (74%)
- Caerleon (74%)

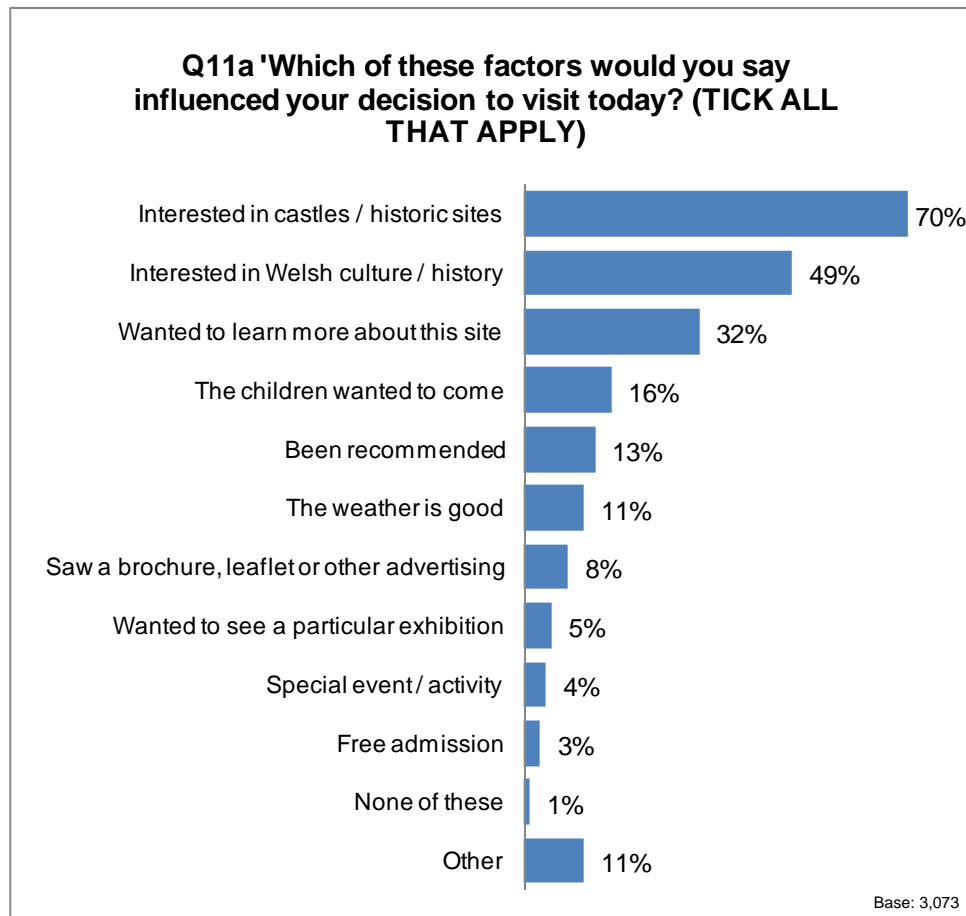
## Visiting other historic attractions



### Visitors step back in time during the summer

- 3.20 Close to two thirds (63%) of visitors to Cadw sites this summer had already visited at least one other historic attraction within three months prior to their visit. This is a significant increase from the shoulder season result (49%) and this might indicate that visitors consider the warmer & drier part of the year more the 'historic attractions season'.
- 3.21 Caerleon has attracted the more seasoned historic attraction visitors, with two fifths (41%) visiting at least their fourth historic attraction within the last three months.

## Influences on the decision to visit

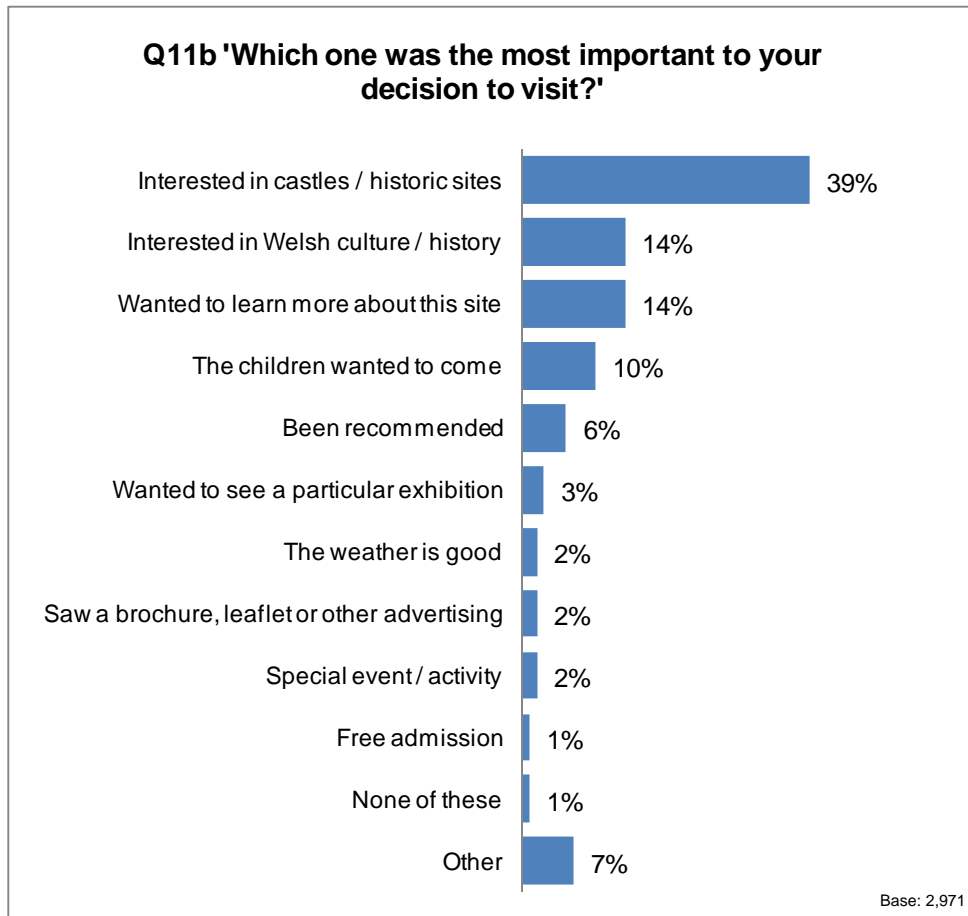


### Interest in castles / historic sites continues to motivate

- 3.22 Similar to previous findings, the primary motivation for visiting Cadw sites is that the majority (70%) of respondents boast an interest in castles and historic sites.
- 3.23 Since the shoulder season, visitors who '*wanted to see a particular exhibition*' has dropped back down to 5% (from 31%). This, perhaps, is because there is less need for events to boost visitor numbers in August, whereas shoulder season interviewing often needed to take place on event days (in order to find enough visitors).

### Interest in Welsh culture / history is growing in the South

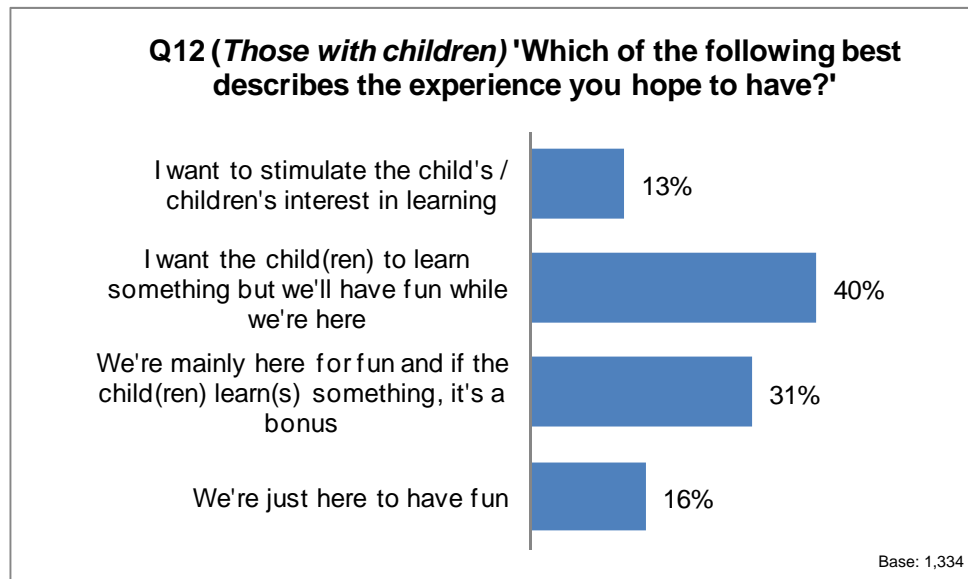
- 3.24 Interest in Welsh culture / history tends to be more dominant in the Northern sites. Harlech Castle comes out highest with 68%, and other Northern sites including Beaumaris Castle, Conwy Castle and Criccieth Castle all have 57% of respondents sharing this interest.
- 3.25 However, an appreciation for Welsh culture / history is growing in the South, notably in Blaenavon (60%), and around half of the respondents in Chepstow and Caerphilly report an interest.



### Some variation in results by site

- 3.26 Like 2015 and the shoulder season, 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 (39% of respondents).
- 3.27 The highest proportions answering '*interested in castle / historic sites*' are found in the SE sites of Caerleon (53%) and Chepstow (49%).
- 3.28 The highest proportions answering '*wanted to learn more about this site*' are found in the Northern sites: Criccieth (29%), Conwy (22%) and Caernarfon (21%).

## Family expectations for children's experience



### An opportunity to learn and have fun

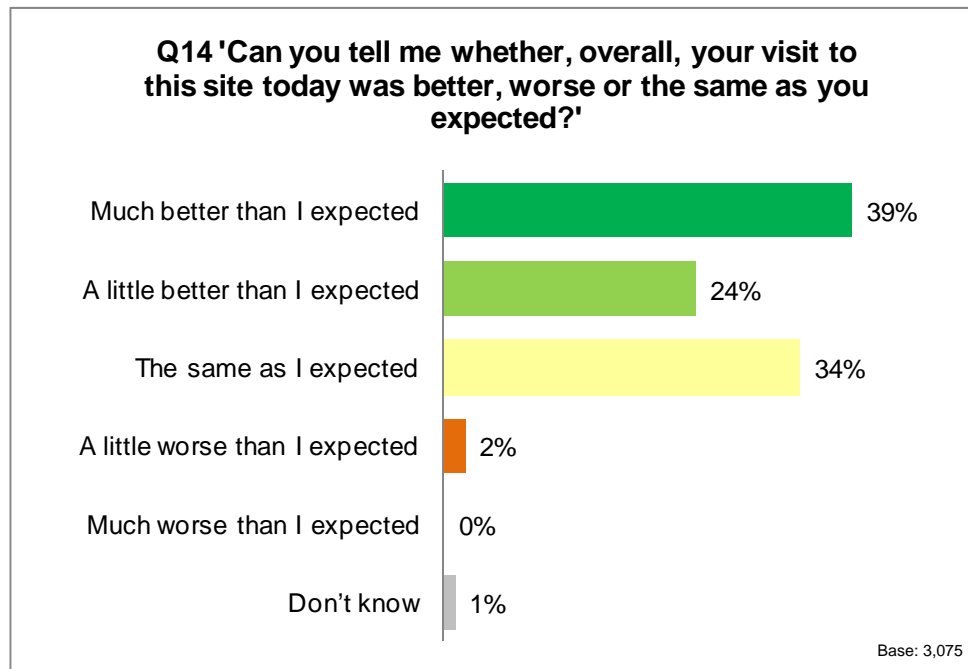
- 3.29 It seems families with children visiting Cadw sites hope to learn whilst having fun, which replicates similar results from summer 2015. Most (71%) families with children hope to experience a combination of learning and fun.
- 3.30 There is little variation between sites; however there are some noticeable shifts in what families focus on achieving from their visit since the summer in 2015 at some of the sites.
- 3.31 At Caerleon, 100% of families placed more emphasis on the learning 'extreme' in 2015, but this year families have turned their heads towards fun, with 44% of families visiting solely for fun.
- 3.32 Visitors at Castell Coch have also changed their motivations for visiting since 2015, when the majority (71%) of families visited primarily for fun. This year, about half (48%) of families with children place emphasis solely on the learning element instead.

### Differences by broad age of children are not significant

- 3.33 Whether a party contains younger children or older children, the balance of motivations (learning and fun) does not differ significantly.



## Experience compared to expectations



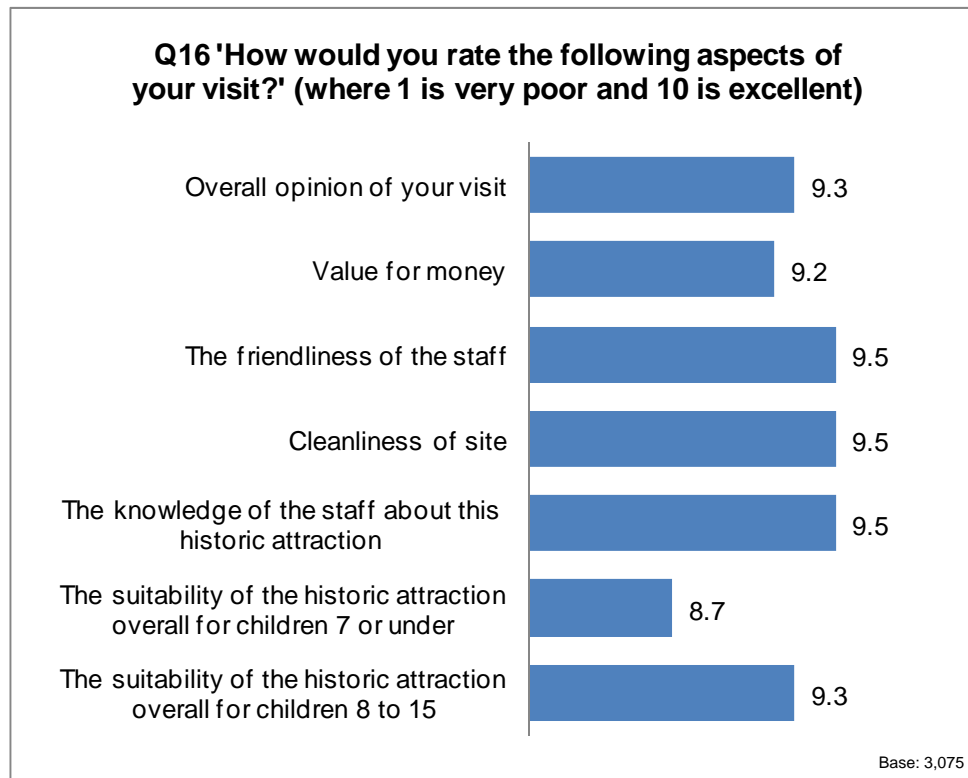
### Cadw sites continue to impress

- 3.34 It would appear that Cadw sites continue to surpass visitor expectations, as the majority (63%) of visitors describe their experience as better than expected.
- 3.35 Caerleon continues to surprise visitors greatly, with the vast majority (82%) describing their experience as *much better* than expected. Raglan has also wowed visitors, with about two thirds (65%) having a much better experience than expected.

### Experiences vary depending on number of previous visits

- 3.36 Generally speaking, the sites exceeding expectations the most tend to be attracting more first-time visitors. The top 3 sites with visitors enjoying an experience 'much better than expected' – Caerleon (82%), Raglan (65%) and Harlech (57%) – have all welcomed around three quarters of visitors for the first time to their sites this summer.

## Rating different aspects of the experience



*The suitability of the site for children has just been asked to visitors with children in the relevant age group  
All 'don't knows' are excluded from the results*

### High satisfaction persists

- 3.37 Overall, the visitors at Cadw sites report being highly satisfied (9.3 out of 10) with their visits this summer. The high satisfaction scores have not changed since the peak season in 2015.
- 3.38 Once again, visitors seem to be the most satisfied at Caerleon, which scores a very high 9.7 out of 10; three quarters (75%) of the respondents have awarded the site a perfect 10. This reflects the number of visitor experiences exceeding expectations (Q14 above).

*"I didn't realise how much was here and how well preserved it is."  
Couple, on holiday*

### Value for money

- 3.39 Value for money at Cadw attractions averages a high 9.2 out of 10. Ratings across the sites are fairly consistent, but a couple of points to note:
- Caerleon averages an extremely high 9.8
  - Once more, Tintern Abbey has the lowest average score (along with Chepstow) at 8.6

### Superb staff

- 3.40 Visitors across all sites have been highly satisfied with the friendliness and the knowledge of staff, scoring an average of 9.5 out of 10 overall for both aspects.
- 3.41 While there is little variation between sites for either aspect, there are a few points to note:
- Beaumaris visitors are highly impressed with the knowledge of staff, giving them the highest average score, with an almost perfect 9.9
  - All sites score above 9 out of 10 for knowledge of staff
  - The highest average scores for staff friendliness are reported at Caerleon and Harlech, both averaging 9.8 out of 10
  - All sites score above 9 out of 10 for friendliness of staff

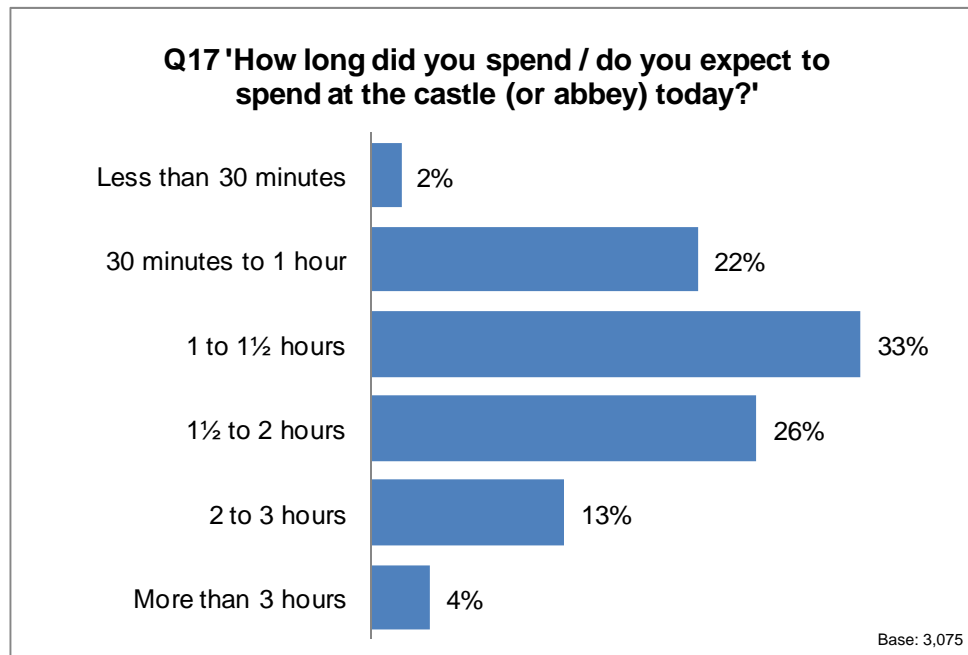
### Suitability for children

- 3.42 The suitability of Cadw attractions for children varies by the age of children in question, and also by site.
- 3.43 Suitability for older children (aged 8 to 15) averages 9.3 out of 10. The rating is particularly high at Caerleon (9.7); however some other South Eastern sites are not doing as well – Tintern Abbey (8.6) and Chepstow (8.7).
- 3.44 Suitability for younger children (aged 7 or under) rates not quite as well (8.7 on average). Here the highest ratings are at:
- Caerleon (9.7)
  - Raglan (9.5)
- 3.45 These two sites are rated much higher than the others, which average below 9 out of 10.

*“More interactive things for younger children to interest them more.”*  
Family with younger children, Caernarfon Castle

*“The information is not visually appealing for children.”*  
Family with younger children, Chepstow Castle

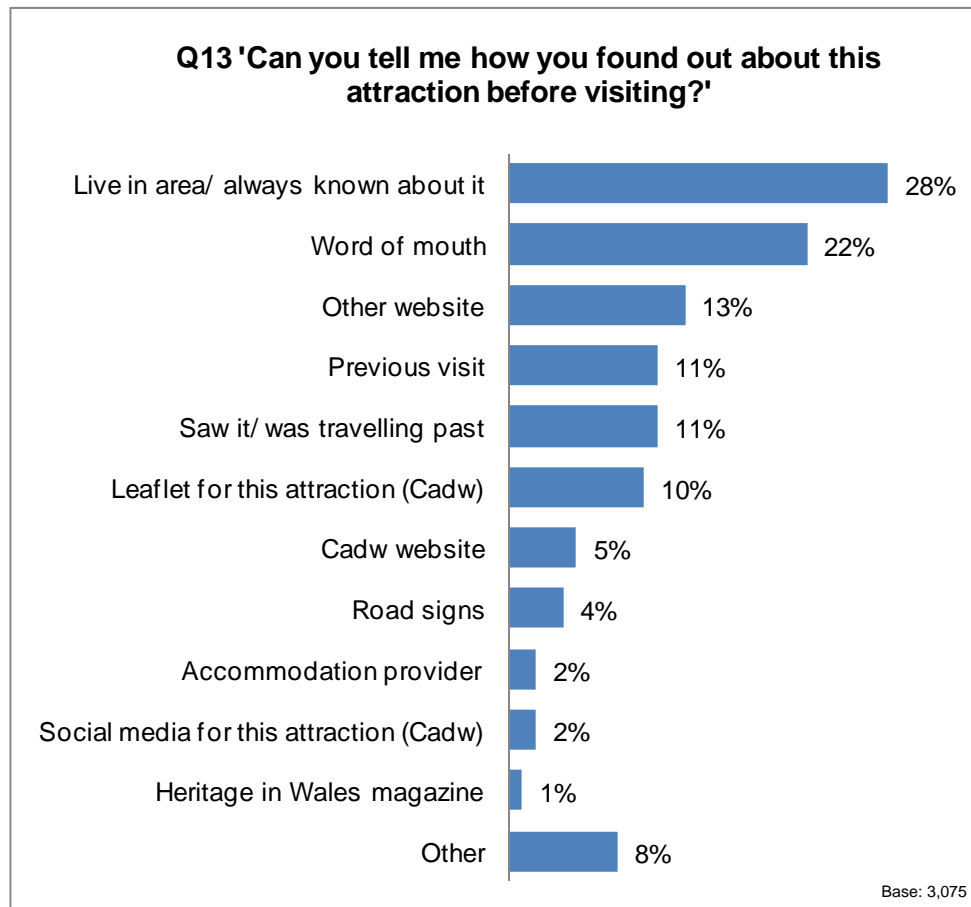
## Length of time spent at the attraction



### Spending the summer at Cadw sites

- 3.46 The vast majority (76%) of visitors have stayed at Cadw sites for longer than an hour this summer period, compared to 62% of visitors in 2015.
- 3.47 The average dwell time among peak season visitors is approximately 1.6 hours, which is slightly higher than dwell times in summer 2015 (1.3 hours).
- 3.48 Caernarfon Castle (2.1 hours) and Caerphilly Castle (1.9 hours) stand out as the sites with the longest average dwell times – higher than in summer 2015 (both 1.7 hours).
- 3.49 Interestingly, the average dwell time at Caerleon remains noticeably short (0.9 hours), despite visitors being highly satisfied with their time there.

## Source of awareness



### Awareness sources continue to vary

3.50 As with previous findings, awareness stems from various sources. The top two sources are the same as both the shoulder season and in 2015 – ‘*live in area/ always known about it*’ (28%) and ‘*word of mouth*’ (22%). However, the varied results could indicate a recall bias, where respondents struggle to pinpoint how they first became aware of the attraction.

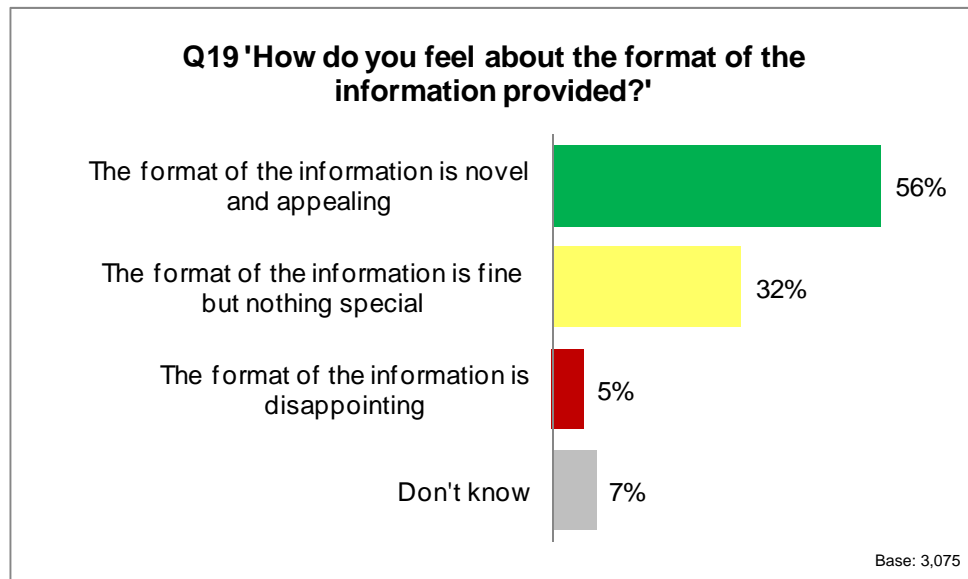
3.51 Among the more specific sources of awareness given, online and offline sources have both played a role in raising awareness. The sites where the Cadw website has raised awareness the most are:

- Chepstow (11%)
- Harlech (11%)

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

- Chepstow (20%)
- Raglan (18%)
- Harlech (18%)

## Information format



### Format continues to please

- 3.53 Over half (56%) of respondents have found the information format at Cadw sites '*novel and appealing*'. This is comparable to the results seen in summer 2015 (60%).

*"There's been a good embrace of modern technologies."*  
Couple, Caerphilly Castle

*"The detail is personal and well written."*  
Family with younger children, Raglan Castle

- 3.54 Caerleon fares particularly well, with nearly all (94%) of its visitors saying the information is novel and appealing. Raglan Castle also fares very well with 87%.

*"It caters for all ages. The interaction is very good."*  
Family with older children, Caerleon

*"Each room makes you really think about the past – it's so informative."*  
Couple, Raglan Castle

- 3.55 However, visitors' feelings towards the information format at Conwy Castle have dropped since the summer season in 2015, when half (51%) of respondents found it to be appealing. This summer, about a third (32%) of visitors have felt this way.

*"More information is needed on site, especially for teens."*  
Family with older children, Conwy Castle

*"It needs to be more geared up for children."*  
Family with younger and older children, Conwy Castle

## Visitor suggestions of improvement

- 3.56 As expected with the high satisfaction scores across all Cadw sites in Q16 above, many visitors say there is nothing to improve. However, there are some noteworthy suggestions given at various sites.

### Information at some sites

- 3.57 The most common suggestion regards the information available at the sites. Some visitors feel that there could be more information displayed in the rooms open to the public, particularly at Caerphilly Castle and Conwy Castle.

*"I would have liked to be able to read more in each part of the castle."*  
Couple, Caerphilly

*"There needs to be more information boards before the exhibits, and also boards giving the castle's history through the ages."*  
Family with younger children, Caerphilly

*"More information on what equipment was used and about the people who lived here."*  
Family with older children, Raglan

### Catering facilities

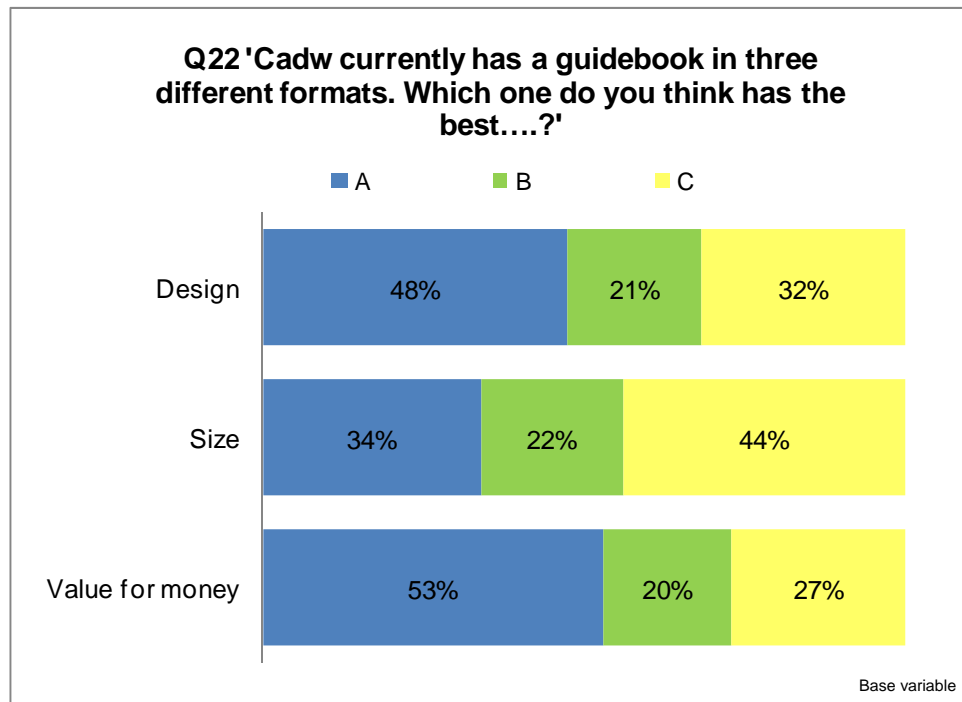
- 3.58 Some visitors feel there is a lack of catering facilities available. This has been mentioned repeatedly at Caerphilly and Caernarfon, and families with children have commented on this the most. This is noteworthy because improved catering facilities may encourage visitors to stay longer at Cadw sites.

*"Some refreshments on site like a tea shop with small cakes and snacks."*  
Family with older children, Caerphilly

*"A coffee shop inside would make people stay longer."*  
Family with younger children, Caernarfon

*"A small cafe here would be ideal."*  
Family without children, Caerphilly

## Guidebook feedback



### Which is which?

- A = large and thick (£4.95)
- B = large and thin (£3.50)
- C = small and folds out (£2.50)

### Guidebook design

3.59 The design of guidebook A is favoured by about half (48%) of the respondents across all sites. Out of the three, guidebook A is bound the strongest and is easier to read according to respondents. It is the preferred design among all party types and all origins of visitor (Wales, UK, Overseas).

*"The print is better to read."*  
Couple, Castell Coch

*"It looks clearer, and there are far more pictures."*  
Alone, Beaumaris Castle

*"It's stronger and more of a book, so you could keep it with this design and size because it's sturdier."*  
Couple, Chepstow Castle



### Guidebook size

- 3.60 Guidebook C is the smallest option in size, and this is the most often preferred (44% of visitors). It is particularly popular among families with young children, with about half (47%) of respondents opting for it. The small size means the guidebook is quite compact and easy to hold while walking around the sites.

*"It's pocket size – easier to browse on site."*

Family with younger children, Chepstow

*"The smaller size is better for carrying with a small family and all the stuff you have to bring anyway."*

Family with younger children, Kidwelly

*"I don't want to carry a heavy book around, so C is best."*

Family with younger children, Conwy

- 3.61 Although there is little variation between sites, Caerleon stands out as the only site to prefer guidebook A for size (44% of visitors). This may be indicative of the wealth of information provided in the guidebook, and the number of historic attraction enthusiasts headed to the site (discussed in Q10).

*"It looks like it's full of interesting information."*

With friends, Caerleon

*"You can put it in your bookshelf – it's something to keep."*

Family with younger children, Caerleon

### Value for money

- 3.62 Although guidebook A is the most expensive option, costing £4.95, around half (53%) of respondents rate it the best in terms of value for money. Visitors may feel this way because it has the most information provided, and they can use it as a keepsake.

- 3.63 All party types and origins of visitor prefer guidebook A on value for money.

*"It's the most comprehensive for the cost and would be a great reminder of the trip to take back."*

Family with younger and older children, Caerleon

*"Given the context and content, it's very affordable because it has so much in it."*

Organised group, Tintern Abbey

*"There's more information and it's a keepsake."*

Lone visitor, Chepstow

*"Guidebook A has lots more information for not that much more money."*

Couple, Beaumaris

## 4. Implications for Cadw

### Continued high satisfaction

Cadw continues to impress visitors to its sites, and there is little room for improvement on most aspects of the visit. The staff would no doubt appreciate hearing the feedback that they are rated very highly for friendliness and knowledge.

### Are prior expectations too low?

The visitor experience continues to outperform prior expectations, often greatly. While this is good news in terms of the performance of the attractions, could non-visitors be staying away because they don't expect much from a visit to a Cadw site? This question cannot be answered from a visitor survey but would require research among non-visitors.

### Suitability for children

While Cadw sites are well rated for 8 – 15 year olds, the perceived suitability for 0 – 7 year old children remains a slight weakness at every site apart from Caerleon and Raglan. Could any aspects of the offering at Caerleon and Raglan be applied to other sites?

### Changes at Caerphilly

Results show that visitors to Caerphilly Castle are more positively surprised by their experience following the addition of new attractions. It is early days, and so Cadw should monitor the effects of the new attractions on visitor experience in the longer term.

### Improved information needed at Conwy

Opinions on the information format at Conwy Castle have dropped significantly since summer 2015, and it is now the lowest rated of the sites on this. It may now be time to look into improving the appeal of the information provided there.

### Guidebook B loses its place

Among the three guidebooks, it is clear that if the format becomes standardised then guidebook B (large & thin – £3.50) should be shelved. It is the least preferred on all aspects by all visitor types.

### Guidebook A vs C

If two formats could be kept, guidebooks A (large & thick – £4.95) and C (small and folding out – £2.50) complement each other well. Guidebook A suits those wanting comprehensive information and/or a keepsake, whereas guidebook C is a good smaller and cheaper alternative for those just wanting to know the basics and/or lugging around burdensome amounts of child-related baggage.

If only one format is to be used in future, guidebook A would seem the better format to keep because it is preferred for design and it can be charged at twice the price while still being perceived better value.

Cadw could consider reducing the size of guidebook A to something more similar to C, but this would mean either increasing the thickness or reducing the content. This would be a risk as it could jeopardise the reasons why it is currently liked.