

Cadw Peak Season Visitor Survey 2022

Publication Date: 16 February 2023

Social Research Number: 17/2023



© Crown copyright 2023 Welsh Government

Mae'r ddogfen hon ar gael yn Gymraeg hefyd / This document is also available in Welsh
Rydym yn croesawu gohebiaeth a galwadau ffôn yn Gymraeg /
We welcome correspondence and telephone calls in Welsh

Cadw Peak Season Visitor Survey 2022

Anthony Lydall, Strategic Research and Insight



Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:

Cadw Research Team

Cadw

Welsh Government Building

Sarn Mynch

Llandudno Junction

LL31 9RZ

Email: cadw.research@gov.wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

ISBN: 978-1-80535-099-6

16 February 2022

Contents

1. Headline Findings	2
2. Background and Methodology	4
3. Purpose of Visit and Demographics.....	5
4. Visitor Experience	19
5. Implications for Cadw.....	30

1. **Headline Findings**

Visitor satisfaction remains very high

- 1.1 Cadw sites continue to achieve very high visitor satisfaction – as has been reported in previous visitor surveys. Overall experience averages 9.4 / 10, with all sites averaging above 9.0. Friendliness of staff (9.7) and cleanliness of the site (9.7) average near perfect ratings.
- 1.2 There is a fair amount of variation among sites regarding their suitability for children. St Davids (9.7), Caerphilly (9.6) and Conwy (9.5) are all very well rated on this aspect. The rating for some sites however drops below 9, especially at Caerleon (8.4).
- 1.3 Ratings on the availability of benches / picnic benches also vary greatly by site. Caernarfon (9.7) and St Davids (9.7) score near faultless ratings, but improvement is needed at Caerleon (7.2) and Harlech (7.9).

Motivation for visiting

- 1.4 Being interested in castles / historic sites stands out as the most common main factor for visiting the site – cited by over half (55%) of respondents and well ahead of the next most common main factor, 'interested in Welsh culture / history' (12%).
- 1.5 This does however differ significantly by visitor origin. 'Interested in castles / historic sites' is the main motivation for 61% of overseas and 60% of UK (outside of Wales) visitors, but a much lower proportion (35%) of Wales visitors.

Good level of information on boards at most sites

- 1.6 Overall, about two thirds (68%) of visitors agree most with the statement '*There are plenty of information boards, so I understand the site well*' and a further 11% agree most with '*There are plenty of information boards, but I haven't / won't read them all*'. A minority (19%) of visitors agree most with '*I have / will read the information on the boards, but there aren't enough of them*'.
- 1.7 The proportion saying they will read the information but there aren't enough boards is highest at Conwy (29%) and Caerphilly (25%).

Positive feedback on interpretive installations

- 1.8 The majority (76%) of visitors to sites which have interpretive installations really like them, with some (22%) even saying there should be more. Caerleon stands out as having the highest proportion (87%) of visitors saying they really like the installations (whether or not there are enough of them). The proportion is on or close to 80% at Beaumaris, Caernarfon, Caerphilly, Castell Coch and Conwy.

Expectations of a café

- 1.9 Two thirds (67%) of visitors to sites with a café (Castell Coch, Caernarfon and Harlech) turn up expecting to see one and use it.
- 1.10 At sites without a café, 26% of visitors say it *'would have made the experience much better'* and 28% say it *'might have made the experience better'*.
- 1.11 Coffee machines are no substitute for a café. Only 9% say that a coffee machine *'would have made the experience better'*, whereas 36% *'prefer an onsite café'* and 55% say they *'don't need a coffee machine'*.

Audio / digital tours and events to bring sites to life

- 1.12 Prompted ideas to improve the visitor experience are quite evenly spread, but in general, ideas which are audio / digital or events are generally more popular than those directly involving staff or physical site improvements. In order, the most popular possibilities are:
- Audio tour (27%)
 - Small-scale history event (26%)
 - Digital tours on own device (23%)
 - Small-scale events for children (20%)
 - Digital interactive experience (19%)

2. Background and Methodology

Why has this research been conducted?

2.1 Cadw wished to understand the profile of its peak-season visitors and their experience at eleven major sites in order to inform future marketing strategy. Cadw last conducted face-to-face peak-season visitor research in 2018, and before that in 2015. This report makes comparisons with the previous surveys, where questions are the same and differences are significant. Cadw commissioned Strategic Research and Insight (SRI), an independent Cardiff-based research agency, to conduct the research on its behalf.

How has the research been conducted?

2.2 2,048 interviews have been conducted at 11 Cadw sites during the school summer holidays in 2022 using a questionnaire based partly on previous Cadw surveys and updated to reflect pertinent information needed now. The sample structure by site is shown below:

Site	No. of interviews
Conwy	351
Caernarfon	334
Harlech	209
Caerphilly	193
Beaumaris	170
Tintern	152
Castell Coch	151
Raglan	128
Chepstow	121
Caerleon	121
St Davids	118
Total	2,048

2.3 Throughout the report, differences between sites and demographic groups are highlighted where statistically significant.

3. Purpose of Visit and Demographics

Peak Season Visitor Profile

Profile	2022	2018	2015
Age			
0 – 7	10%	11%	12%
8 – 15	17%	14%	13%
16 – 24	8%	10%	7%
25 – 34	10%	11%	11%
35 – 44	17%	16%	17%
45 – 54	14%	12%	15%
55 – 64	11%	11%	11%
65+	13%	15%	14%
<i>Base:</i>	<i>2,040</i>	<i>3,075</i>	<i>1,486</i>
SEG			
AB	46%	43%	39%
C1	33%	36%	38%
C2	14%	14%	15%
DE	7%	7%	8%
<i>Base:</i>	<i>2,001</i>	<i>3,050</i>	<i>1,474</i>
Where resident			
Wales	22%	27%	25%
UK outside Wales	63%	54%	56%
Overseas	15%	19%	19%
<i>Base:</i>	<i>2,048</i>	<i>3,075</i>	<i>1,495</i>
Ethnicity			
White	97%	97%	96%
Other	3%	3%	4%
<i>Base:</i>	<i>2,039</i>	<i>3,068</i>	<i>1,493</i>

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

Fairly similar profile to previous years, except shift in origin

- 3.1 The visitor profile in the peak season of 2022 broadly reflects the profile reported in the peak seasons of 2018 and 2015.
- 3.2 The origin of visitors though has become centred on UK outside Wales. The following sites have seen the largest changes in the proportion of visitors coming from the UK outside Wales compared to peak season 2018:
- Caerphilly (41% UK in 2022: +12%pts on 2018)
 - Raglan (65%: +11%pts)
 - Beaumaris (79%: +10%pts)
- 3.3 Changes in UK visitor proportions have come in contrast to the proportions of both Wales and overseas visitors decreasing.

How does the visitor profile compare to population statistics?

Profile	Cadw peak season visitor sample 2022 – England and Wales visitors	England and Wales population – census data
Age		
0 – 7	11%	9%
8 – 15	17%	10%
16 – 24	8%	10%
25 – 34	10%	13%
35 – 44	17%	13%
45 – 54	13%	13%
55 – 64	11%	13%
65+	13%	19%
<i>Base:</i>	1,709	59,597,500
Ethnicity		
White	97%	85%
Other	3%	15%
<i>Base:</i>	1,702	58,381,000

Non-white ethnic groups are very under-represented

3.4 Non-white ethnic groups make up 15% of the England & Wales population, but only 3% of Cadw's England & Wales visitor profile.

Strong family market for Cadw; over 65s under-represented

3.5 The visitor profile to major Cadw sites is very well represented in the 8 – 15 age group, and also in one of the associated parent age groups (35 – 44). In contrast to this, Cadw visitors are under-represented in the 16 – 34 and over 65 age groups.

Very strong AB representation, but lack of C2DEs

3.6 The Census does not measure socio-economic status in the same way as in our research, and so figures are not directly comparable. However, estimates by segmentation specialists place the 'AB' proportion of the UK population at around a quarter, which makes Cadw's profile (46%) well above that. At the same time, the 'C2DE' proportion of the population is estimated at around 40 – 45%, which makes Cadw's profile of this segment (21%) significantly lower.

How does Cadw’s visitor profile compare to the profile of holidaymakers to/in Wales?

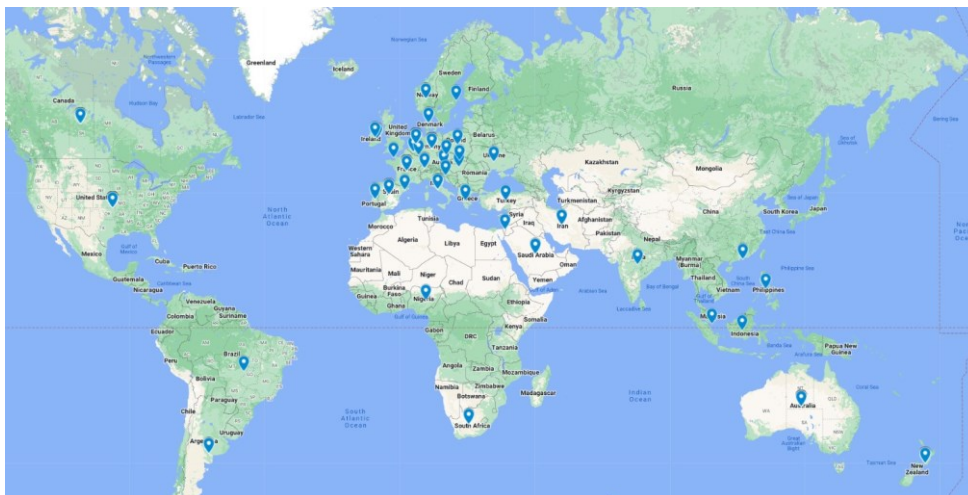
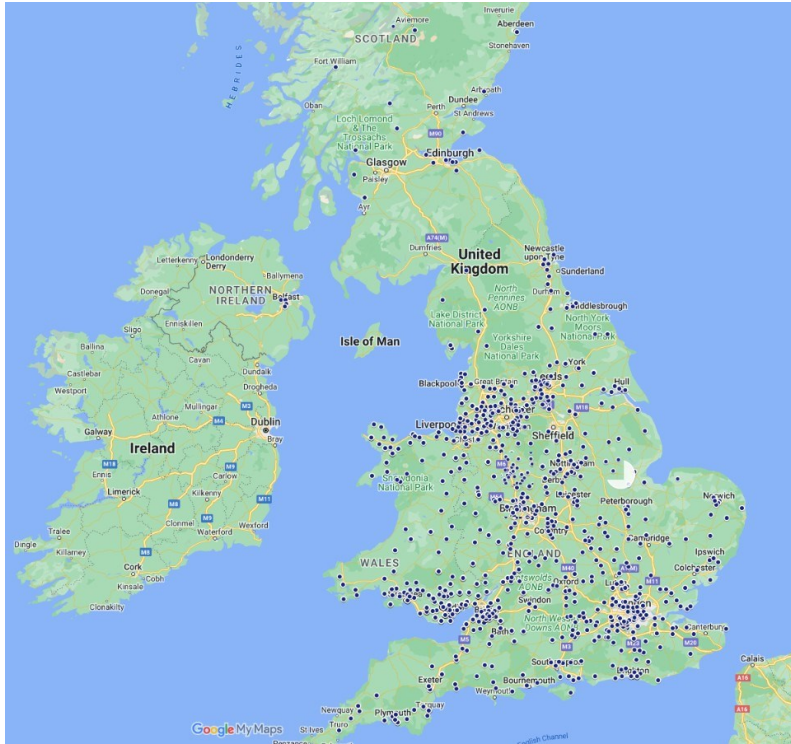
Profile	Cadw peak season visitor sample 2022 – UK visitors staying away from home	Wales visitor survey 2019 – UK visitors staying away from home
Age		
16 – 34	23%	16%
35 – 54	43%	45%
55+	34%	39%
Base:	1,212	3,103
SEG		
ABC1	79%	73%
C2DE	21%	27%
Base:	1,188	3,103
Ethnicity		
White	97%	98%
Other	3%	2%
Base:	1,209	3,103

N.B. 'UK' in the above figures includes holidaymakers who live in Wales, as well as those who live outside of Wales

Staying visitor profile aligns more closely with holidaymaker profile to/in Wales than the population

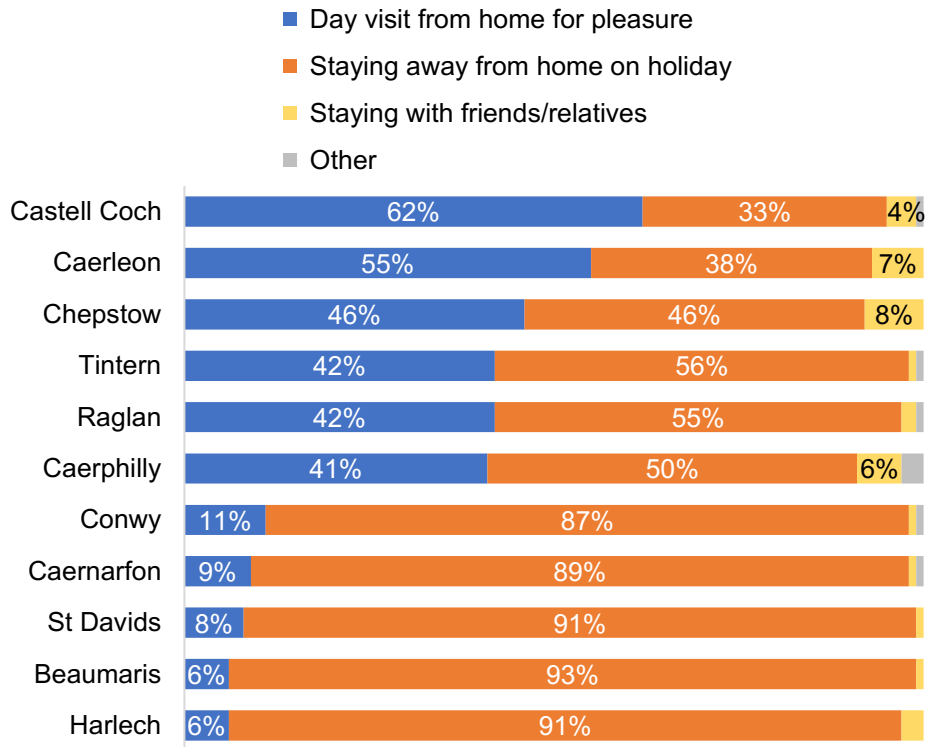
- 3.7 Comparing Cadw’s UK holidaymaker profile with the profile of UK holidaymakers to/in Wales reveals some differences. However, these are less significant than the vast differences in SEG and ethnicity when comparing with the England & Wales population, discussed previously.
- 3.8 Whilst Cadw’s visitor profile is very dominated by white ethnicity and higher socio-economic groups, this is also the case generally among UK staying visitors to/in Wales. More could be done to attract C2DEs who are holidaying in Wales however.
- 3.9 By age, Cadw sites attract a younger profile than the all-Wales staying visitor profile.

Maps of visitor origin



Main Purpose of Visit

Q1 "What is the main purpose of your visit to this town/area today?"



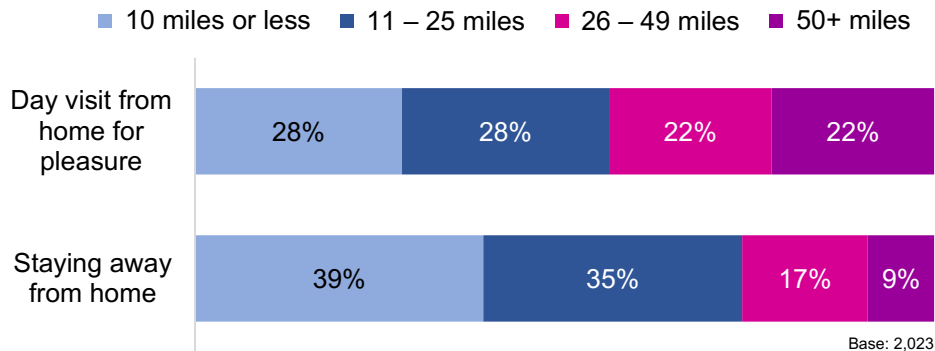
Base: 2,048

Divide in results between SE Wales and NW & SW Wales

- 3.10 Cadw sites in South East Wales attract a balanced mix of visitors on a day trip from home and holidaymakers.
- 3.11 In North West Wales and St Davids in Pembrokeshire, the sites are in or close to popular holiday destinations, and this shows in the far higher proportions on holidaymakers visiting during the summer.

Distance Travelled on the Day

Q5 "From where you stayed last night, how far did you travel today to this site?"

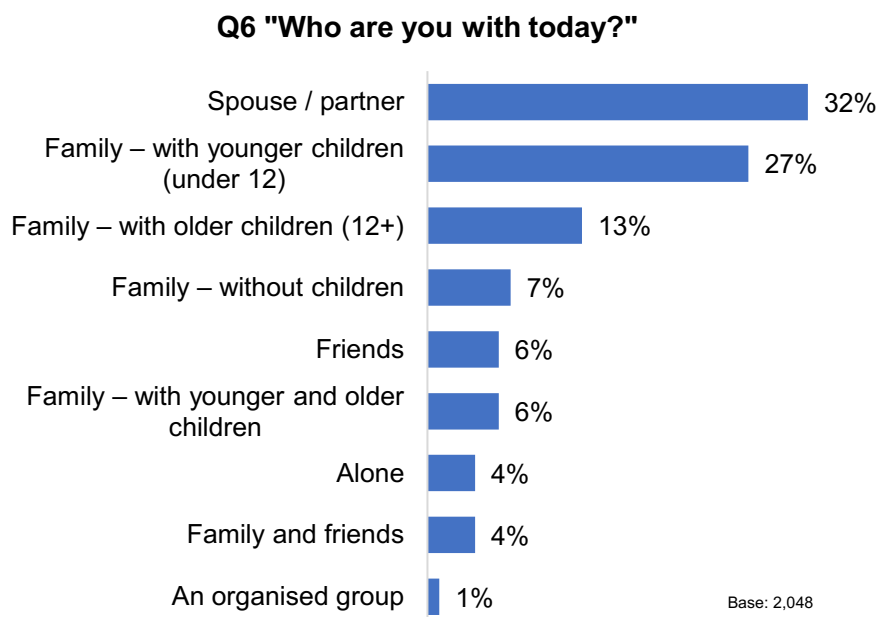


'Don't knows' have been excluded from the results

Day trippers from home travel further on average

3.12 Distances travelled on the day to reach Cadw sites vary greatly from one visitor to another. In general, visitors staying away from home tend to travel a shorter distance to get to the site compared to day visitors starting and finishing their trip at home. Consequently, distances travelled to Cadw sites in the popular holiday region of North West Wales tend to be shorter than to other sites, except Castell Coch, which is very close to Cardiff.

Party Type



No significant change in party profile

- 3.13 The two most common party types on Cadw sites in peak season remain couples and families with (only) younger children. The above results are very similar to peak season 2018.
- 3.14 Differences by site are mostly not significant, except that Tintern has a noticeably lower proportion (18%) of families with young children (with or without older children too) compared to the average across other sites (33%). Visitors to Tintern often comment on enjoying the tranquillity of the site.

“The best aspect is the calm atmosphere and the surroundings”

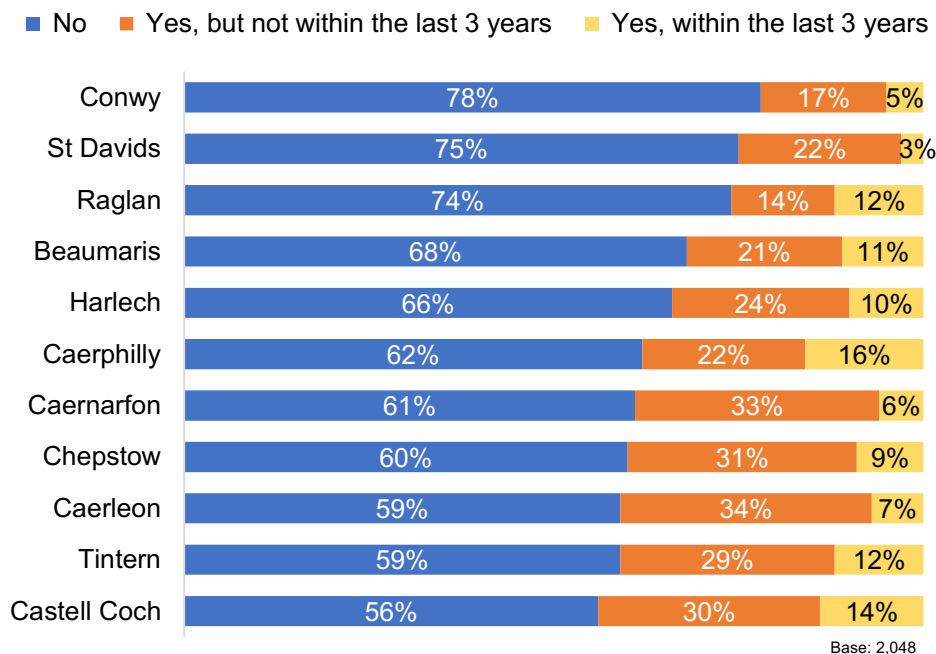
Lone visitor, South West England, Tintern

“The peace and tranquillity is the most enjoyable aspect. Lots of places we go to don't feel like this.”

Couple, New Zealand, Tintern

New / lapsed / previous visitors

Q8 "Have you ever visited here before?"



High proportion of new visitors

- 3.15 Two thirds (66%) of visitors in the sample were new to the site at the time of interviewing. Most of the remainder (25%) had visited before, but not in the last three years, leaving just 9% repeat visitors (within the past three years).
- 3.16 There is variation by site. New visitors are more generally likely to be found in popular holiday regions (NW and SW Wales), although Raglan in SE Wales goes against the grain with its high proportion of new visitors.

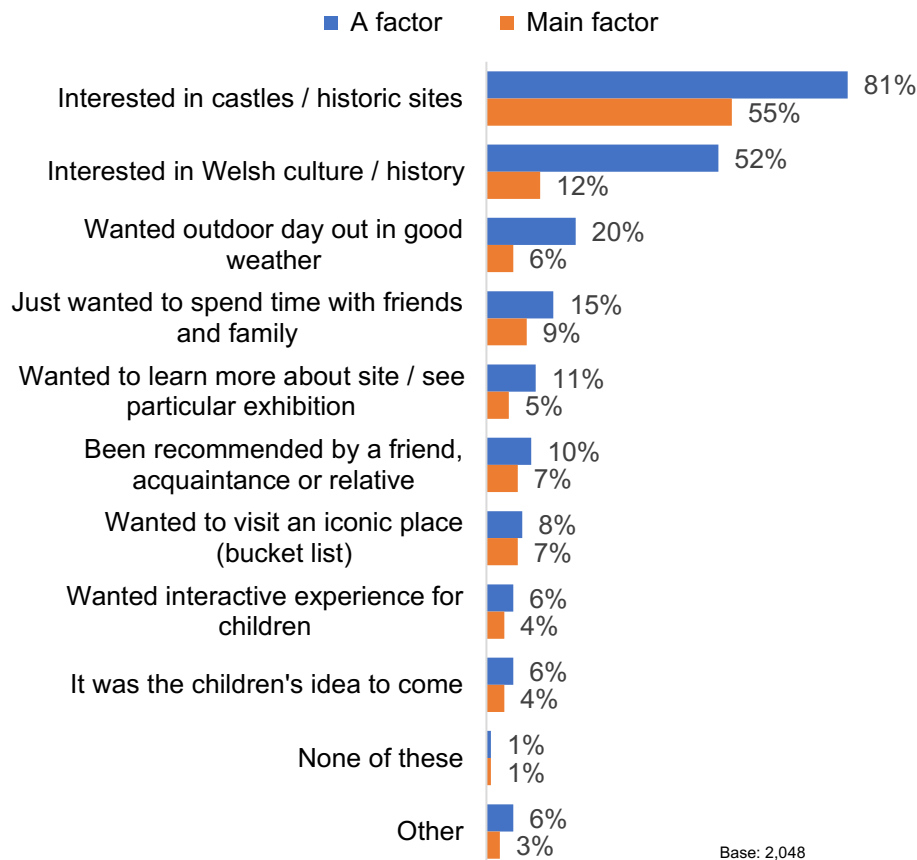
"We have enjoyed finding out about somewhere new, historical. It's just a lovely castle."

Couple, London, Raglan

- 3.17 Visitors from outside Wales are more likely to be new, but not exclusively. 30% of UK visitors (from outside Wales) and 15% of overseas visitors are either repeat (visited within the last three years) or lapsed (not visited within the last three years).

Motivation for visiting

Q9 "Which of these factors would you say influenced your decision to visit today? / And which one was most important ... ?"



Interest in castles / historic sites

3.18 Being interested in castles / historic sites stands out as the most common main factor for visiting the site – cited by over half (55%) of respondents and well ahead of the next most common main factor, ‘interested in Welsh culture / history’ (12%). Results are not directly comparable with the previous survey in 2018 because some of the answer options have changed, but the overall picture is similar.

Differences by site

3.19 There are some significant differences by site. ‘Specific interest in castles / historic sites’ dominates as the main factor at many sites, but it is less clear-cut at:

- Caerleon, which has the highest proportions of any site *answering ‘just wanted to spend time with friends and family’ (25%), ‘wanted to learn more about this site’ (18%), and ‘wanted interactive experience for children’ (13%)*

/

- Castell Coch, which has a more even spread across all the possible answers
- St Davids, which has the highest proportion of any site answering 'wanted to visit an iconic place' (26%)

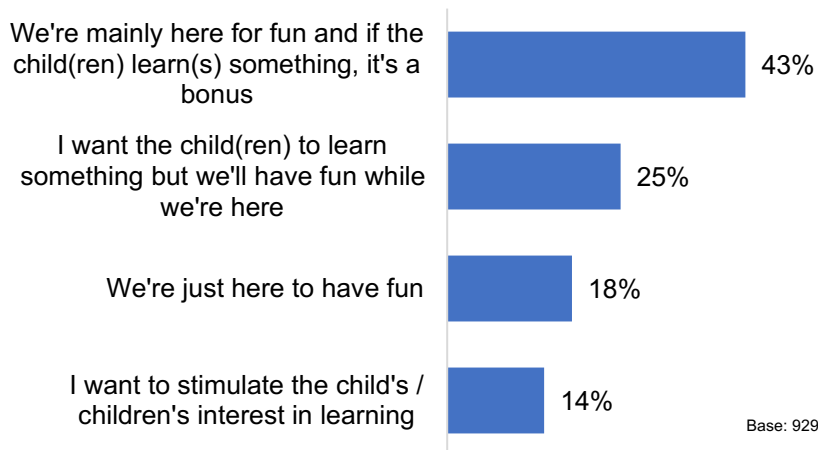
Differences by demographic group

- 3.20 'Interested in castles / historic sites' is the main factor for 61% of overseas and 60% of UK visitors, but a much lower proportion (35%) of Wales visitors.
- 3.21 'Interested in Welsh culture / history' as a main factor also differs significantly by respondent group:
- 19% of Wales and 15% of overseas visitors, compared to 8% of UK visitors
 - 15% of visitors without children, compared to 7% of visitors with children
- 3.22 Main motivation does not vary significantly by age, except in connection with having children (above point).

"I like that we can go anywhere and find out about Welsh history"
Family without children, North Wales, Caernarfon

Desired experience for children

Q10 (Families with children) "... which of the following best describes the experience you hope to have?"



Q10 has been asked only to families visiting with children

Change in results since 2018

- 3.23 The majority (68%) of families with children come to Cadw sites hoping for a mixture of fun and learning. The relative priority of these two experience aspects however has changed

since 2018. The emphasis now seems to lean more towards fun, whereas in 2018, it was more balanced.

3.24 Expectations vary by site. Visiting families placing more emphasis on learning are most likely to be found at the following sites (which are all in SE Wales):

- Raglan (79% place more emphasis on learning)
- Caerleon (74%)
- Tintern (70%)
- Castell Coch (68%)
- Caerphilly (68%)

“Learning about history was the best part”
Family with younger children, South Wales, Raglan

3.25 Visiting families placing more emphasis on fun are most likely to be found at the following sites (which are all in NW and SW Wales, therefore mostly attracting holidaymakers):

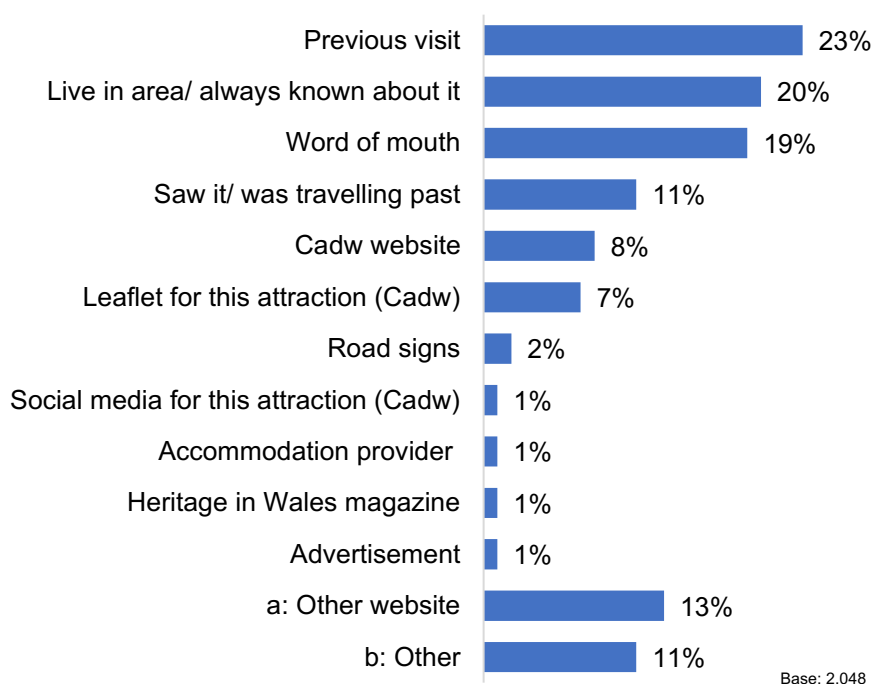
- St Davids (83% place more emphasis on fun)
- Harlech (82%)
- Caernarfon (82%)
- Beaumaris (77%)
- Conwy (75%)

3.26 Results do not vary significantly by whether the children are older or younger.

“All exciting for kids. Accessible tunnels and stairs.”
Family with younger children, North West England, St Davids

Sources of awareness

Q11 "Can you tell me how you found out about this attraction before visiting?" (*prompted*)



Similar findings to previous surveys

3.27 As found in previous surveys, only a minority of respondents can name specific sources of marketing such as Cadw leaflets or the website. However, this does not mean that such sources do not play an important role, because awareness through 'word of mouth' and 'previous visits' has to originate from something.

3.28 The proportions citing 'Cadw website' are highest at:

- Caerleon (17%)
- Raglan (16%)
- Castell Coch (14%)
- Caerphilly (13%)

3.29 The proportions citing 'Leaflet for this attraction' are highest at:

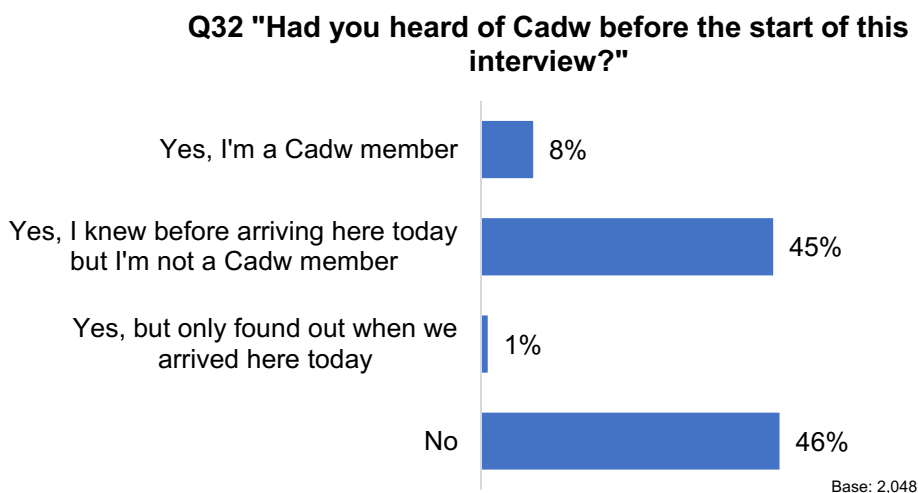
- Beaumaris (12%)
- Caerphilly (10%)

Differences by age

- 13% of under 35s have cited 'Cadw website', compared to 7% of over 35s

- 5% of under 25s have cited 'social media for this attraction', compared to 1% of over 25s
- Older visitors are more likely to answer 'live in area / always known about it' – 28% of over 55s, compared to 16% of under 55s
- Answers for 'leaflet for this attraction' do not vary significantly by age

Awareness of Cadw



Mostly non-members visiting in peak season

- 3.30 There is opportunity to attract more visitors into Cadw membership, as most of those aware of Cadw are not members. This includes 55% of repeat visitors to the site of interview.
- 3.31 There is also scope for increasing awareness of Cadw, as close to half of visitors had not heard of Cadw prior to the interview. This includes 21% of Welsh residents.

Differences by age

- 3.32 As context for viewing awareness differences by age, it is common in market research for awareness results to correlate positively with age. This tends to be due to having been alive for longer because once a person becomes aware of something, they do not easily become unaware of it.
- 3.33 Older visitors are more likely to have been aware of Cadw prior to interview – 60% of over 55s, compared to 51% of 35 – 54 year olds and 43% of under 35s.

4. Visitor Experience

Rated aspects of experience

Site	Overall	Value for money	Friendliness of staff	Cleanliness	Suitability for children	Toilets on-site	Site info available beforehand	Benches and picnic benches
Beaumaris	9.5	9.3	9.8	9.7	9.3	n/a	8.6	8.9
Caerleon	9.1	8.8	9.8	9.8	8.4	n/a	8.7	7.2
Caernarfon	9.6	9.5	9.9	9.8	9.3	9.0	9.5	9.7
Caerphilly	9.4	9.0	9.7	9.6	9.6	9.4	9.2	9.5
Castell Coch	9.4	9.2	9.7	9.6	9.3	9.4	9.3	9.4
Chepstow	9.3	8.8	9.6	9.7	8.7	n/a	9.0	9.1
Conwy	9.6	9.4	9.8	9.7	9.5	9.6	9.2	8.9
Harlech	9.3	9.1	9.6	9.7	8.7	9.5	9.1	7.9
Raglan	9.4	9.1	9.6	9.5	8.9	9.2	9.0	9.3
St Davids	9.6	9.4	9.9	9.8	9.7	9.7	9.3	9.7
Tintern	9.3	9.0	9.7	9.7	8.9	9.4	8.8	9.0
Overall	9.4	9.2	9.7	9.7	9.2	9.4	9.1	9.1

Average scores are out of 10. Figures shown in green stand out as particularly above average for that experience aspect. Figures shown in red stand out as particularly below average.

Excellent overall ratings of experience

- 4.1 Cadw sites continue to achieve very high visitor satisfaction – as has been reported in previous visitor surveys. Overall experience averages 9.4 out of 10, with all sites averaging above 9.0.
- 4.2 Friendliness of staff (9.7) and cleanliness of the site (9.7) average near perfect ratings.

“Great, friendly staff”

Family with younger children, South East England, St Davids

“Staff were very nice; the place was very clean as well”

Group of family & friends, South East England, Caerphilly

“Staff are helpful with info and they care that they've pitched it just right”

Couple, East Midlands, Raglan

Variation in suitability for children

- 4.3 Whereas some ratings such as cleanliness and staff friendliness are consistently high across all sites, there is a fair amount of variation among sites regarding their suitability for children. St Davids, Caerphilly and Conwy are all very well rated on this aspect.

“Kids liked pressing the [audio] button and the quest”

Family with younger children, South West England, St Davids

“The children liked the Welsh dragon”
Family with younger children, France, Caerphilly

4.4 The rating for some sites however drops below 9, especially at Caerleon (8.4).

“There needs to be more tactile, hands-on experience for children”
Family with younger children, South East Wales, Caerleon

Availability of benches and picnic benches

4.5 Ratings on this aspect vary greatly by site. Caernarfon (9.7) and St Davids (9.7) score near faultless ratings, but improvement is needed at Caerleon (7.2) and Harlech (7.9).

“Lack of benches”
Family with younger and older children, South West England, Harlech

“Wish they had picnic benches outside”
Couple, South Wales, Castell Coch

Views, architecture and history

4.6 Aside from specific aspects of the experience rated above, frequently mentioned sources of satisfaction when visiting Cadw sites are:

- Views – especially from the tops of castles which have towers to climb
- Learning about the history and how people might have lived there
- Architecture of the castle or abbey

“It blew my mind as soon as I walked in – it's all so beautiful. It's the views, picturesque.”

Family with younger children, South West England, Chepstow

“It brings back memories of happy family visits. The design of the stone is incredible: the workmanship, the masonry, the design of the oriel window is amazing. It's breadth, width and height and workmanship are amazing.”

Couple, South East Wales, Raglan

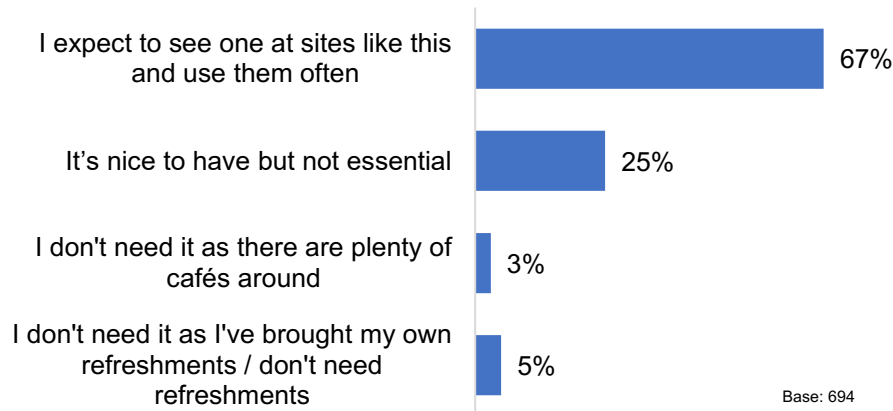
“The history: trying to visualise it how it was. Magnificent!”

Lone visitor, East Midlands, St Davids

“The most breath-taking part is inside the church”
Family with older children, South East Wales, Tintern

Onsite Café

Q13 (Castell Coch, Caernarfon and Harlech) "How has or will the onsite cafe affect a typical visit to a site like this?"



Q13 has been asked to visitors at Castell Coch, Caernarfon and Harlech

Many come expecting a café

- 4.7 Castell Coch, Caernarfon and Harlech are the three sites in the sample which have a café. Two thirds (67%) of visitors to these sites turn up expecting to see one and use it. This proportion is higher at Caernarfon (79%) than at Castell Coch (56%) and Harlech (56%). Findings are consistent across different visitor demographics.
- 4.8 Not only do many visitors come expecting a café, but there are certain expectations of the café too.

"Disappointing that there is no hot food"

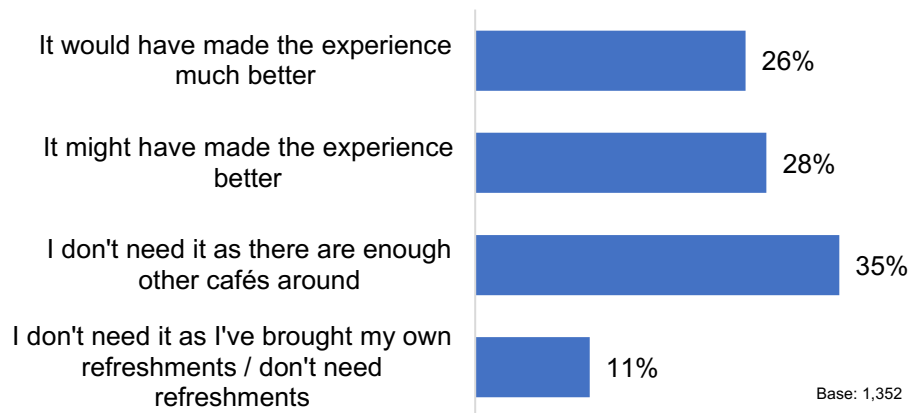
Family with older children, East Midlands, Caernarfon

"There are no vegan sandwiches"

Family with older children, Netherlands, Caernarfon

Possibility of a Café

Q14 (Castell Coch, Caernarfon and Harlech excluded) "How might an onsite cafe affect a typical visit to a site like this?"



Q14 has been asked to all sites except Castell Coch, Caernarfon and Harlech

Onsite cafés could improve the experience for around half of visitors

4.9 At sites without an onsite café, reactions to the prospect of one are split roughly 50/50 between those who feel it could improve the experience and those who don't need it. The strongest calls for a café are at:

- Caerphilly, which is developing one (77% say it would/might have made the experience better)
- Raglan (74%)

"We would have loved a sit down and a drink"
Couple, South East Wales, Caerphilly

"The lack of a café is disappointing"
Family with older children, East Midlands, Raglan

"We would have liked somewhere to get a cup of tea. A café needs to be hidden or blend with the castle surroundings."
Group of friends, South East England, Raglan

4.10 Some Cadw sites may not need their own café as visitors feel there are already enough other cafés around. This is particularly the case at Conwy (57% have answered this).

4.11 St Davids stands out as a site where quite a few (32%) visitors either bring their own refreshments or don't need them.

Variation by visitor type

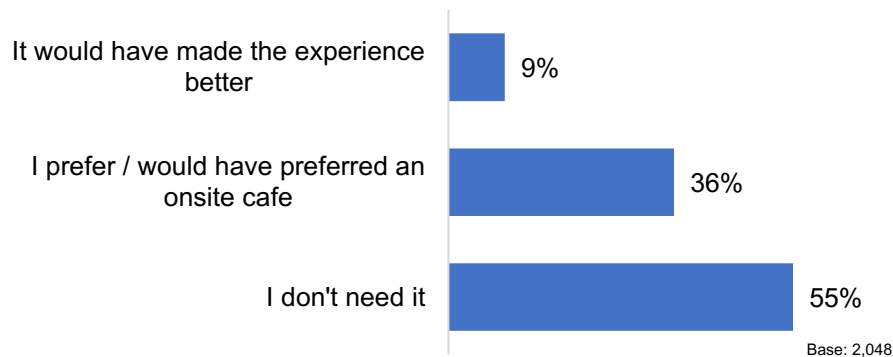
4.12 The following visitor types are more likely to feel that an onsite café would/might have improved their experience:

- Repeat visitors (67%)
- Wales residents (61%)

4.13 Answers do not vary significantly by age or party type.

Coffee machines

Q16 "How might the presence of a coffee machine affect a typical visit to a site like this?"



No strong demand for coffee machines

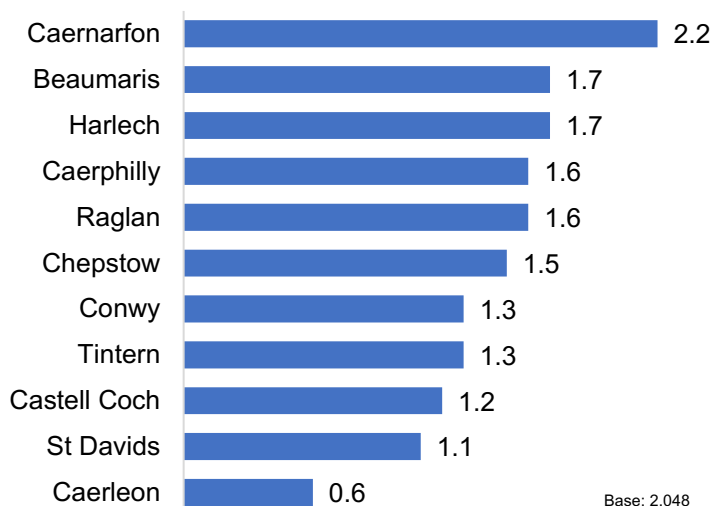
4.14 If visitors want onsite refreshments, they would mostly prefer a café. A coffee machine may be much easier and less costly to install and maintain, but it doesn't meet visitor needs. A café is more than being about refreshments: it is part of the day out experience for many. This was reported in Cadw's *Barriers to Visiting Heritage Sites research* earlier this year.

4.15 Results vary by site, with the proportion saying a coffee machine would have made the experience better reaching as high as 28% at Caerphilly. However, this is still outweighed by those either preferring a café or not needing to buy onsite refreshments, as is also the case for every demographic group.

Dwell Time

Q18 "How long did you spend / do you expect to spend at the castle (or abbey) today?"

Approx. mean time shown in hours



1.5 hours average dwell time

- 4.16 On average, visitors to Cadw sites in peak season spend or intend to spend 1.5 hours there. This is very similar to the previous peak season survey in 2018.
- 4.17 Caernarfon stands out as attracting longer than average dwell times (2.2 hours), whereas visits to Caerleon (0.6 hours average) are typically much shorter than at other sites.
- 4.18 Results do not vary significantly by respondent type and are identical for every age group (1.5 hours average). Results also do not vary by distance travelled to the site.

"I'm leaving to get food in the pub. If a café was inside the castle, I would spend more time here."

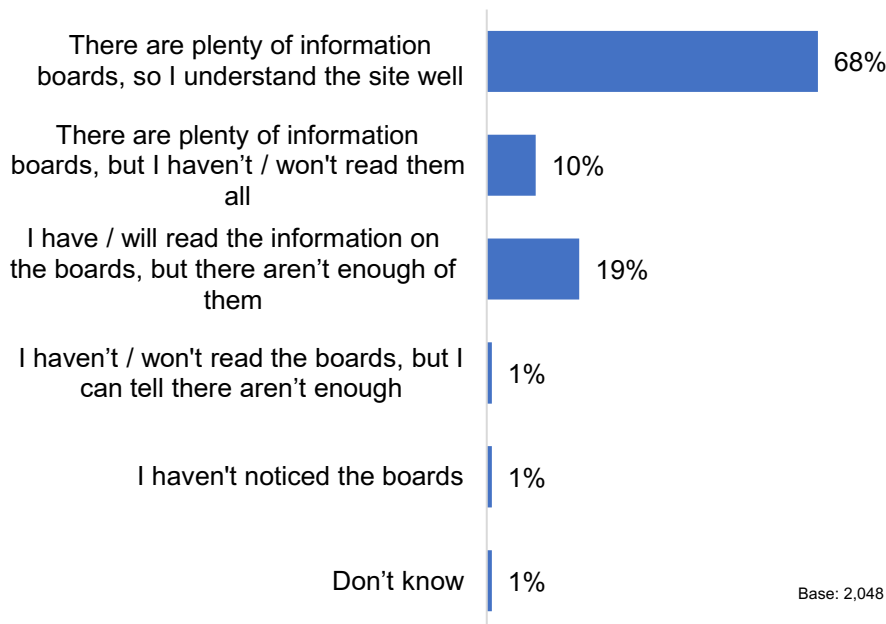
Family without children, South East Wales, Castell Coch

"We enjoyed wondering around the castle in our own time and being able to absorb it all"

Family with older children, North Wales, Caernarfon

Information Boards

Q19 "Thinking about the information panels around the site that help you to understand its history and design, which of the following statements do you agree with most?"



Good level of information overall

4.19 The level of information provided in the form of boards at Cadw sites is generally felt to be sufficient. There is variation by site, although the proportion saying there aren't enough is always in the minority. The proportion saying they will read the information but there aren't enough boards is highest at:

- Conwy (29%)
- Caerphilly (25%)

4.20 And lowest (and therefore most satisfied with the information boards) at:

- Caerleon (4%)
- Castell Coch (9%)

"Generally there needs to be a lot more information. It's lacking in more detailed info."
Family with younger children, South East England, Caerphilly

4.21 Castell Coch is the only site in the survey to offer audio tours, and so this may have influenced the result to this question if visitors feel they already get enough information from that.

“This is the best place. Cadw has excelled themselves with information – the way it is laid out with audio guides.”

Group of family & friends, South East England, Castell Coch

“It's all excellent. I like that there are attractive activity boards for children”

Couple, Yorkshire, Beaumaris

“The boards are appropriate for all ages. It's not overloading.”

Lone visitor, South West England, Raglan

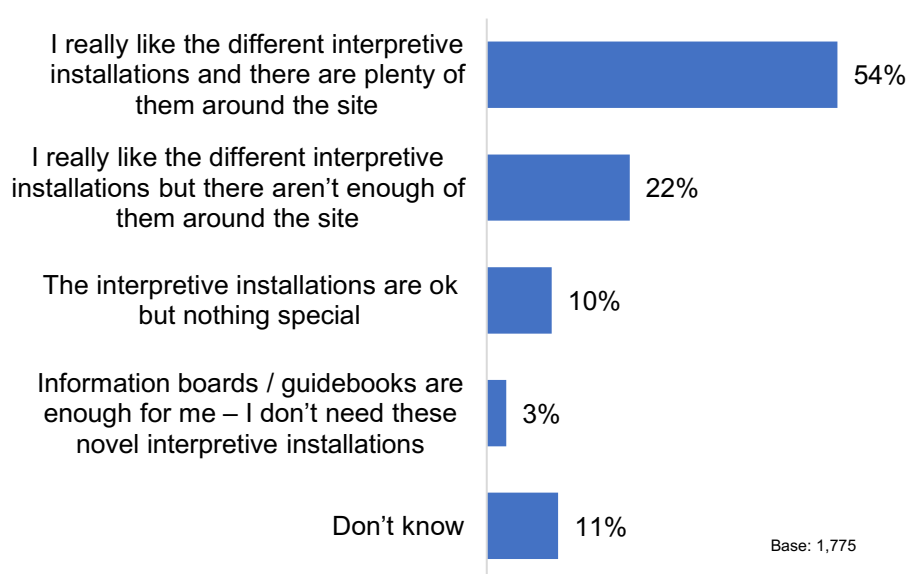
Differences by visitor type

4.22 Answers vary much less by visitor type than by site visited. The few significant differences are:

- ‘I have / will read the information on the boards but there aren't enough of them’ is higher among adults without children (21%) than those with children (16%)
- ‘There are plenty of information boards but I haven't / won't read them all’ is higher among over 55s (14%) than under 55s (9%)

Interpretive Installations

Q21 (Excluding Chepstow and Tintern) " ... how do you feel about the other ways information is shared at the site ... ?"



Q21 has been asked at all sites except Chepstow and Tintern, which currently do not have interpretive installations

Positive feedback

4.23 The majority of visitors to sites which have interpretive installations really like them, with some even saying there should be more. Caerleon stands out as having the highest

proportion (87%) of visitors saying they really like the installations (whether or not there are enough of them). The proportion is on or close to 80% at Beaumaris, Caernarfon, Caerphilly, Castell Coch and Conwy.

“The projection of water on the pool was an unexpected pleasure”
 Lone visitor, North West England, Caerleon

“The projections are amazing and immersive”
 Family without children, South East England, Caerleon

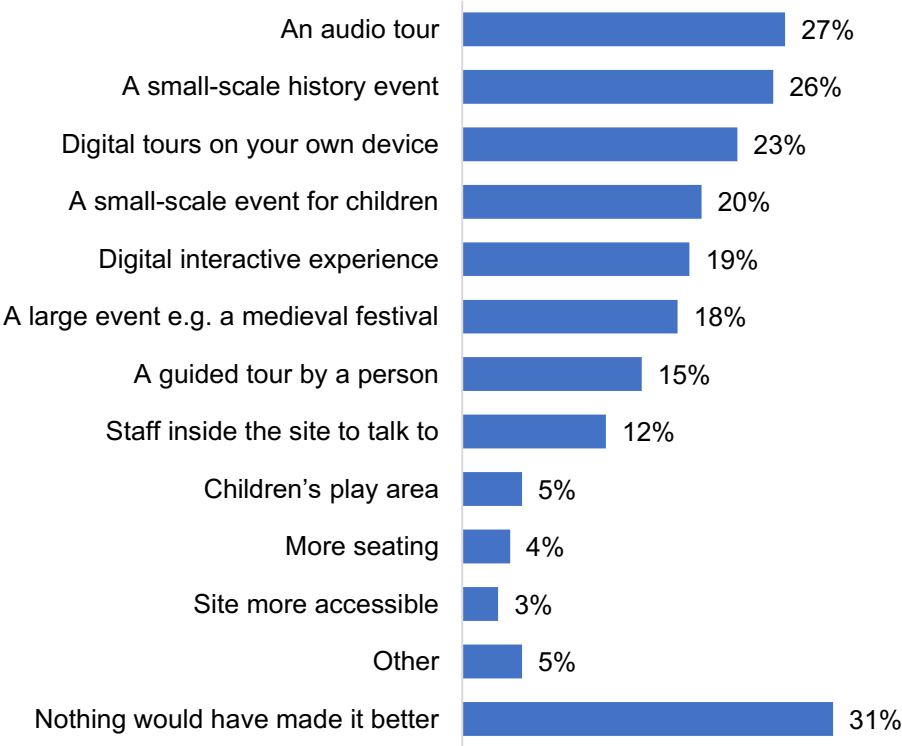
“We loved the interactive dragon story telling. It’s great to get children’s interest sparked.”
 Couple, North Wales, Caerphilly

Differences by age and party type

4.24 Results do not vary significantly by party type. By age, calls for more interpretive installations are higher in the 25 – 64 age range. *‘I really like the interpretive installations but there aren’t enough of them around the site’* is higher among 25 – 64s (25%) compared to under 25s (13%) and over 65s (16%).

Improving the Experience

Q30 "Would any of the below have made your experience to the site better?"



Base: 2,048

Many different ideas for improving the experience

4.25 There are numerous different ideas for improving the visitor experience at Cadw sites, some of which currently feature at certain sites but not others.

4.26 Audio tours are quite a common feature at English Heritage sites, whereas at Cadw sites in this sample, they are currently only available at Castell Coch. There is interest in introducing these at more Cadw sites, especially at:

- Chepstow (43%)
- Harlech (39%)
- Caerphilly (37%)

“There should be those audio machines, like at Castell Coch”

Family with younger children, South West Wales, Caerphilly

“Lack of audio guides. I don't want to work too hard [reading] but you can have great info by this [audio guide].”

Family with younger and older children, South West England, Tintern

“An audio guide would bring alive the life of the monks. As a first-time visitor, you really need this. All the info broken down into a legible experience in bite-sized pieces ... with audio guides, you can go at your own pace.”

Couple, Republic of Ireland, Tintern

4.27 Ideas for improvements which are audio / digital or events are generally more popular than those directly involving staff or physical site improvements.

“I wish there was an interactive phone app for the castle”

Group of friends, South East Wales, Caerphilly

But interactive displays need to work

4.28 If Cadw invests in more interactive displays, it is important that they are maintained because finding a display not working can disappoint.

“The audio is not working. It's disappointing, especially when you've come this far and things aren't working.”

Family with younger children, West Midlands, St Davids

Events wanted for children

4.29 Among families with young children, the two top answers are 'small-scale events for children' (47%) and 'small-scale history events' (43%).

Props, visual aids to generally bring the place to life

4.30 Some visitors would have liked to see the site brought more to life. Making more use of costumes and other props is one suggestion of how to do this.

“More visual info to bring the rooms and the site itself to life – maybe some props in the cellar like wine, crates and pretend food. Pictures by the fireplace of what they would have looked like; have what the oven would look like or what they cooked ... in the kitchen you could have a picture hanging up to bring it to life.”

Couple, South West England, Chepstow

“It would be nice to see some models in costumes, more realism. Seeing a lady fighting was good – we need more visuals like that.”

Couple, East Midlands, Caerphilly

5. Implications for Cadw

Context of already high visitor satisfaction

- 5.1 Visitor satisfaction to Cadw sites remains very high. Any improvements which visitors feel could be made should be seen in the context of making the experience 'even better'.

Applying the best ideas across sites

- 5.2 There are certain features at individual Cadw sites which stand out as giving visitors a lot of satisfaction. These include the audio tour at Castell Coch, the Roman bath light projection at Caerleon and the interactive dragon feature at Caerphilly. In developing other sites, the best ideas could be adapted.

Listening vs reading

- 5.3 The amount of information on boards is generally felt to be sufficient at most sites. Cadw could look into modernising or increasing the number of boards at some sites, but perhaps a better use of resources would be an additional medium of communication. The audio tours at Castell Coch go down very well, and many visitors to other sites would like this. Alternatively, digital tours on a visitor's own device would also be quite popular.

Events to attract visitors

- 5.4 Aside from audio / digital interpretation, more events of different kinds and sizes would also be welcomed, especially by families with young children. This all forms part of bringing the history of the site 'to life'.

Cafés are a major consideration

- 5.5 Currently, an onsite café is only a feature at three of the eleven sites featured in this research, and in development at one other (Caerphilly). Where there is an onsite café, it is widely expected and used. Where there isn't one, it would often have improved the visitor experience. Coffee machines are no substitute. Cadw's *Barriers to Visiting Heritage Research* showed that aside from eating & drinking out of necessity, enjoying good company and a treat in a café is an important part of the 'day out experience' for many.
- 5.6 The need for an onsite café may be less at some sites like Conwy, Beaumaris and Tintern, where the Cadw sites are close to many cafés in the town. But more isolated sites like Raglan would benefit from an onsite café.
- 5.7 Cafés may take a fairly considerable investment to develop and operate, but if they can be run profitably, they are an additional source of income for Cadw, as well as being an important part of many visitors' day out experience.