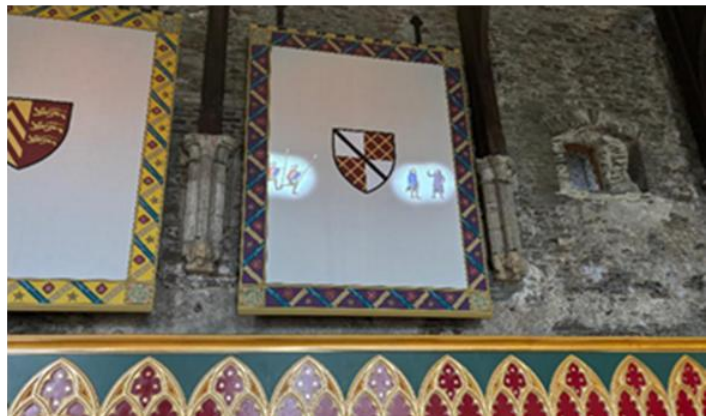




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Peak Season Visitor Survey (Cadw)



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Cadw Peak Season Visitor Survey

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

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1. Headline findings

Very high satisfaction across all sites

- 1.1 Most (85%) visitors 'strongly agree' that their 'overall experience is/was good'. The majority (73%) 'strongly agree' that the site is 'good value for money'. This high level of satisfaction is consistent across all sites.

Exceeding many expectations, especially at Caerphilly

- 1.2 About two in five (39%) visitors describe their experience as 'better than expected', and nearly all of the remainder (59%) describe it as 'as expected'. All sites perform very well against expectations, particularly Caerphilly, following substantial investment. Three in five (60%) describe their visit to Caerphilly as 'better than expected'. Average dwell time at Caerphilly has increased significantly from an estimated 1.6 hours in summer 2022 to 2.2 hours.

Expectations of small ruins

- 1.3 Cadw's marketing is addressing pre-visit misconceptions by providing more images online. To some extent this may be working in that the proportion saying their visit exceeded expectations has come down from 51% in autumn 2024 to 39% now.
- 1.4 That said, many misconceptions still exist, with expectations of small sites that are only ruins. Many visitors from outside Wales seem to base their expectations on castles and abbeys in England and Scotland, many of which are not as intact as the largest Cadw sites in Wales.

Who is visiting in peak season?

- 1.5 23% of summer visitors come from Wales, 60% from the UK outside Wales and 17% from overseas (similar to the previous peak season survey in 2022).
- 1.6 Summer 2025 has seen 30% of the visitors falling into the over 55 age bracket. This is higher than in summer 2022 (24%) and autumn half term 2024 (23%).
- 1.7 Cadw has faced a long term challenge of attracting more of the lower socio-economic groups to its sites. It has however managed to attract 13% DEs this summer. This is higher than in autumn half term 2024 (6%) and summer 2022 (7%).

Low awareness of booking online

- 1.9 A minority (32%) were aware at the time of interviewing that they could book online and get discounted entry. Many (54%) did not even know they could book online.

Excellent pre-visit information from Cadw

- 1.10 The core pre-visit pieces of information often sought are opening times, prices, directions and parking. Further key information which is only sought by a minority of visitors but finding the right answers can make or break a visit includes accessibility needs and whether dogs are allowed.
- 1.11 Visitors typically try and find the 'castle website' and end up on the Cadw website through Google. Feedback on the ease of finding what they needed on the Cadw website is almost all positive.

Preferred formats of non-written interpretation

- 1.12 Many formats of interpretation would be welcomed at Cadw sites, most notably 3D models of the castle / abbey (75% say they would engage with this) and historically accurate furnished rooms (73% would engage).
- 1.13 Families with children typically want more of everything, whereas parties without children have sometimes answered that they would prefer something not to be at the site. Some open comments have been made by parties without children that they don't want historic sites turned into 'theme parks'.

World Heritage Site: Beaumaris, Caernarfon, Conwy and Harlech

- 1.14 The majority (66%) of visitors to the four King Edward I castles were aware at the time of interviewing that the castle forms part of a World Heritage Site, and they usually knew that there are other sites included. However, 34% were unaware of the status.
- 1.15 Intentions are split roughly 50/50 between visiting more than one of the four castles and visiting just one during the trip. If only visiting one castle, 'limited time' is by far the most common barrier, cited by 74% of respondents.

2. Background and method

Why has this research been commissioned?

- 2.1 Cadw wished to understand the profile of its peak season visitors and their experience at eleven busier sites in order to inform future decision making and evaluate recent developments. Cadw last conducted a face-to-face peak season visitor survey in 2022. The most recent face-to-face visitor survey in any season was in autumn (shoulder season) 2024. This report makes comparisons with the previous surveys where questions are the same and differences are significant.
- 2.2 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?

- 2.3 3,007 interviews have been conducted with visitors at eleven Cadw sites between 23rd July and 3rd September 2025 using a questionnaire based partly on previous Cadw surveys and updated to reflect pertinent information needed now.

Table 1: Sample structure by site

Site	No. of interviews	Site	No. of interviews
Conwy	503	Raglan	252
Caernarfon	384	Chepstow	231
Beaumaris	353	Tintern	210
Harlech	324	Kidwelly	112
Caerphilly	295	Laugharne	82
Castell Coch	261	Total	3,007

- 2.4 The sampling structure by site is broadly in line with the proportion of visitors that each site contributes to Cadw’s overall total in peak season, whilst also ensuring that the less busy sites have an adequate sample size for individual analysis.
- 2.5 Throughout the report, differences between sites and demographic groups are highlighted where statistically significant.

3. Demographics

Summer 2025 visitor profile

Table 2: Demographic profile of visitors by season

Profile	Summer 2025	Autumn 2024	Autumn half term 2024	Summer 2022
Age				
0 to 7	11%	6%	9%	10%
8 to 15	14%	12%	15%	17%
16 to 24	6%	8%	7%	8%
25 to 34	11%	19%	12%	10%
35 to 44	15%	16%	19%	17%
45 to 54	13%	12%	15%	14%
55 to 64	14%	14%	11%	11%
65+	16%	13%	12%	13%
Base:	2,982	1,179	400	2,040
SEG				
AB	43%	43%	48%	46%
C1	32%	30%	29%	33%
C2	12%	15%	17%	14%
DE	13%	12%	6%	7%
Base:	2,816	1,054	367	2,001
Where resident				
Wales	23%	24%	23%	22%
UK outside Wales	60%	61%	66%	63%
Overseas	17%	15%	11%	15%
Base:	3,007	1,179	400	2,048
Ethnicity				
White	95%	94%	96%	97%
Other	5%	6%	4%	3%
Base:	2,996	1,167	393	2,039

Slightly older age profile than summer 2022 and autumn half term 2024

- 3.1 Summer 2025 has seen 30% of the visitors falling into the over 55 age bracket. This is higher than in summer 2022 (24%) and autumn half term 2024 (23%).

Differences in SEG

- 3.2 Cadw has faced a long term challenge of attracting more of the lower socio-economic groups to its sites. It has however managed to attract 13% DEs this summer. This is higher than in autumn half term 2024 (6%) and summer 2022 (7%).

Ethnicity

- 3.3 Cadw has also faced a long term challenge of attracting a more diverse ethnic profile. This summer has seen the non-white proportion of visitors increase from 3% to 5% since summer 2022 (a difference which is significant). We have endeavoured to gather a sample which is broadly representative by site of Cadw's total visitor population in peak season, although there can be some degree of sampling variation.

Residence

- 3.4 The peak season profile does not differ significantly between 2022 and 2025. Summer 2025 has seen a higher proportion (17%) of overseas visitors than autumn half term 2024 (11%).

Table 3: Comparison of visitors to census data

Profile	Cadw shoulder season visitor sample 2024: England and Wales visitors	England and Wales population: census data
Age		
0 to 7	12% ¹	9%
8 to 15	15% ¹	10%
16 to 24	6% ²	10%
25 to 34	11%	13%
35 to 44	15%	13%
45 to 54	13%	13%
55 to 64	12%	13%
65+	16% ²	19%
Base:	2,486	59,597,500
Ethnicity		
White	95% ¹	85%
Other	5% ²	15%
Base:	2,498	58,381,000

1. Figures shown stand out as particularly high. 2. Figures shown stand out as particularly low.

Age profile

- 3.5 Compared to the England and Wales population, children are well represented in Cadw's peak season visitor profile, whereas 16 to 24s are under-represented.
- 3.6 Cadw's profile of over 65s has increased since summer 2022. It remains below the population profile, but the gap to the population has narrowed. Perceived lack of accessibility is a key hindrance for this age group visiting castles, but Cadw has addressed this issue at some of its sites since three years ago.

Non-white ethnic groups remain under-represented

- 3.7 Non-white ethnic groups make up 15% of the England & Wales population, but only 5% of Cadw's England & Wales summer visitor profile. This imbalance is typical for the culture sector.

Very strong AB representation, but lack of C2DEs

- 3.8 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 England & Wales profile (41%) well above that. At the same time, the 'C2DE' proportion of the population is estimated at around 40 to 45%, which makes Cadw's profile of this segment (27%) significantly lower, although it is higher than in summer 2022 (21%).

How does the visitor profile compare to tourists in Wales more generally?

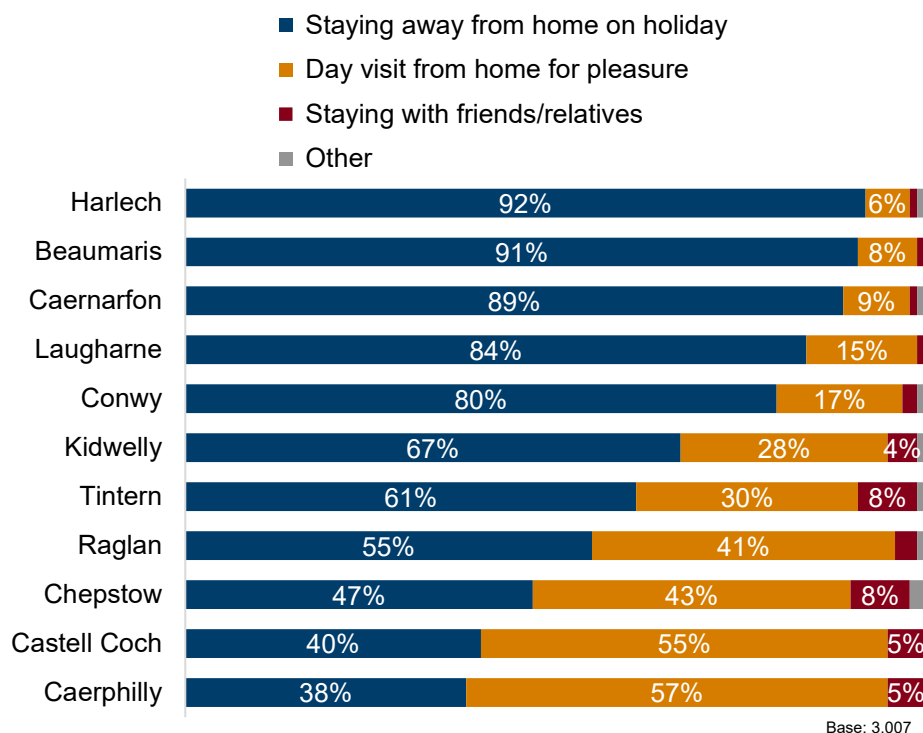
- 3.9 Although there has been some shift since summer 2022, Cadw's visitor profile remains dominated by white ethnicity and higher socio-economic groups. Among holiday visitors to Wales, 11% are of non-white ethnicity (compared to 5% of Cadw's profile). There is no directly comparable socio-economic data.

Map of visitor origin (UK visitors):



Main purpose of visit

Figure 1: Q1 “What is the main purpose of your visit to this town/area today?”

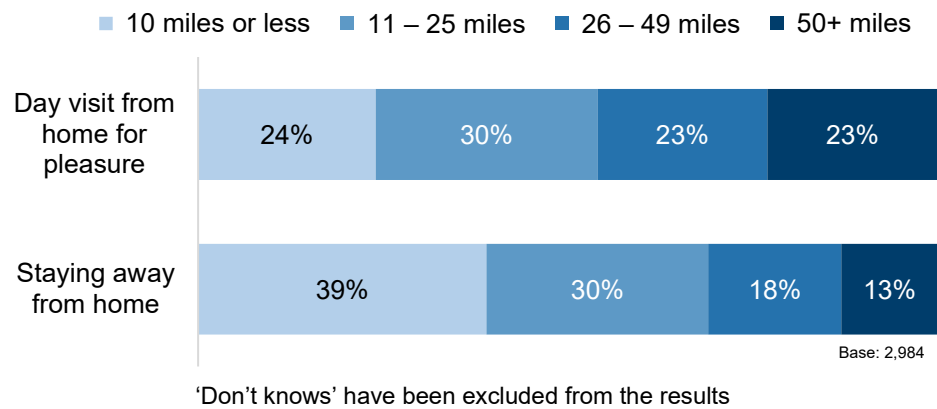


Divide in results between South East (SE) Wales and the rest

- 3.10 Cadw sites in South East Wales continue to attract a balanced mix of visitors on a day trip from home and holidaymakers.
- 3.11 As has been shown in previous Cadw visitor surveys, North West Wales sites, which are in or close to popular holiday destinations, attract the majority of their visits from overnight stays. The proportion of holidaymakers increases with travel distance / time from England.
- 3.12 The profile at Laugharne (SW Wales) is similar to that of the North West Wales sites, being situated in a popular holiday region. Kidwelly (SW Wales) also sees the majority of its visitors being holidaymakers.

Distance travelled on the day

Figure 2: Q5 “From where you stayed last night, how far did you travel today to this site?”

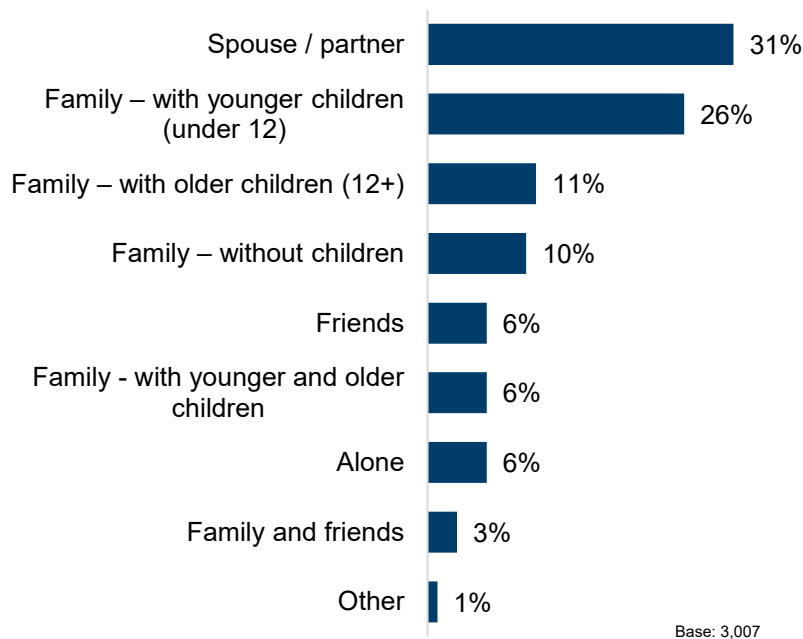


Day trippers from home travel a bit further on average

- 3.13 More overnight visitors travel 10 miles or less on the day than day visitors.
- 3.14 The highest proportion (43%) of visitors travelling 10 miles or less is found at Harlech, whose profile is nearly all holidaymakers. At the other end of the scale, 27% of visitors to Raglan and 29% of visitors to Tintern travel 10 miles or less.
- 3.15 Differences by visitor type or origin are not significant.

Party type

Figure 3: Q6 “Who are you with today?”



Very similar profile to summer 2022

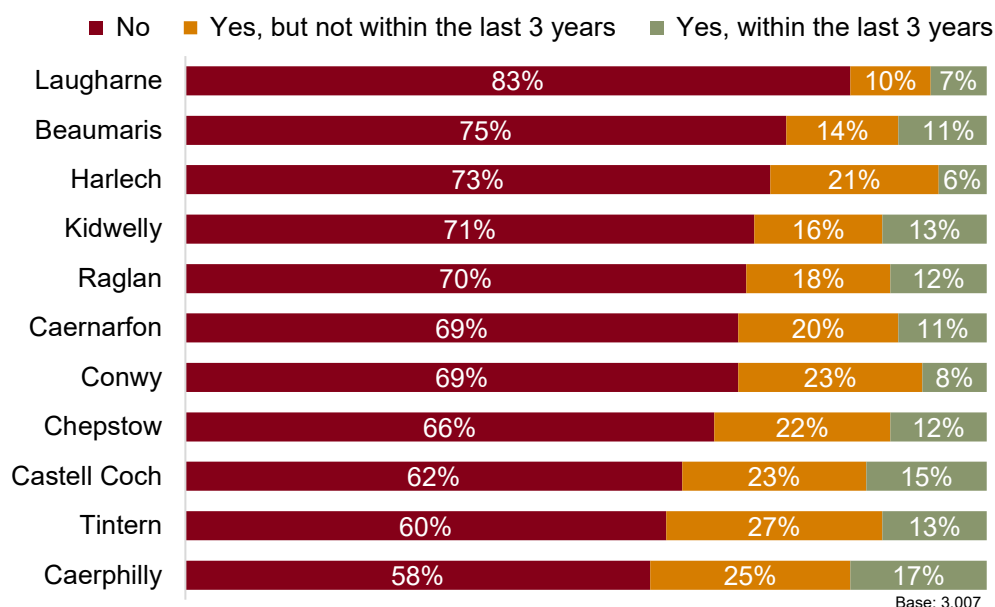
- 3.16 A substantial proportion (43%) of visiting parties include children. This is similar to summer 2022 (46%).
- 3.17 The proportion of parties with children is noticeably much lower (21%) at Tintern Abbey than at the other sites. Visitors to Tintern often comment on the tranquillity being a key motivation for visiting.

“It’s quiet; not a lot of children. We were a little worried it would be full of children.”
Adult relatives, Netherlands, Tintern

4. Previous visit history and pre-trip planning

New / lapsed / previous visitors

Figure 4: Q8 “Have you ever visited here before?”

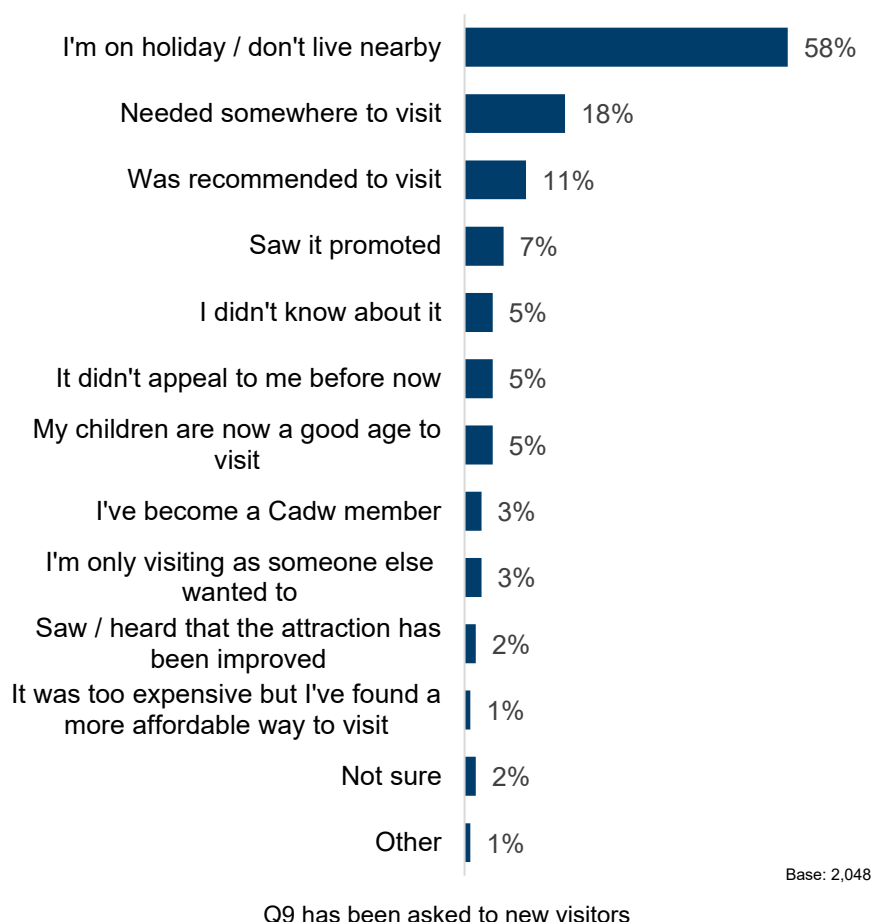


About two thirds new visitors

- 4.1 About two thirds (68%) of visitors in the sample were new to the site at the time of interviewing. This is similar to the proportion of new visitors in both the autumn 2024 and summer 2022 surveys.
- 4.2 Most of the remainder (21%) had visited before, but not in the last three years, leaving just 11% repeat visitors (within the past three years).
- 4.3 Generally speaking, the highest proportions of new and lapsed visitors are found at sites in SE Wales (which attract high proportions of day trippers), whereas new visitors are more likely to be found at sites in popular holiday areas.
- 4.4 Visitors from outside Wales are more likely to be new, but not exclusively. 28% of UK visitors (from outside Wales) and 11% of overseas visitors are either repeat (visited within the last three years) or lapsed (not visited within the last three years). The findings in the 2022 summer survey were similar.

Reasons for visiting now but not before (new visitors)

Figure 5: Q9 “Is there any particular reason why you are visiting now but had never visited here before?”



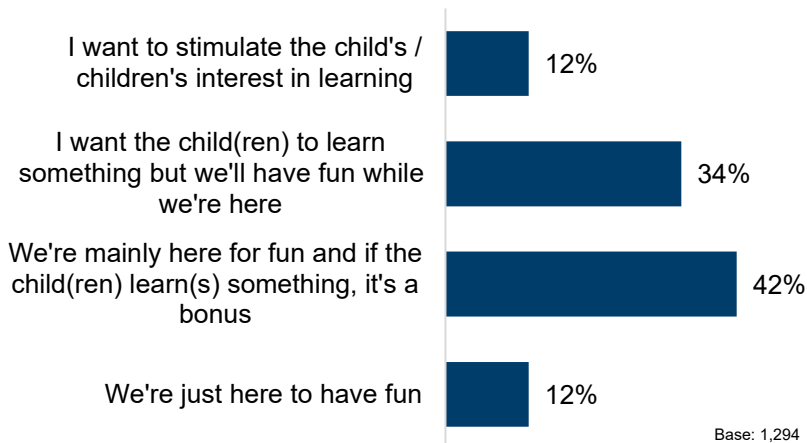
Don't live nearby

- 4.5 If visitors come for the first time, the reason why they haven't visited before is usually because they don't live in the region. This is a new question and so there are no comparable results from earlier surveys.
- 4.6 Among Welsh visitors, the most common answer is 'needed somewhere to visit' (26%), and 10% have answered 'I've become a Cadw member'.
- 4.7 One answer which stands out in particular as differing by site is 'saw it promoted': 19% at Kidwelly and 17% at Castell Coch, compared to the average of 7% across all major sites.
- 4.8 Of the 22 respondents answering that they have found a more affordable way to visit, 9 say this more affordable method of entry is English Heritage / Historic Environment Scotland / Manx Heritage, and 2 say Cadw membership. Various other

methods of free or discounted entry have been given by one or two respondents each.

Desired experience for children

Figure 6: Q11 (Families with children) “... which of the following best describes the experience you hope to have?”



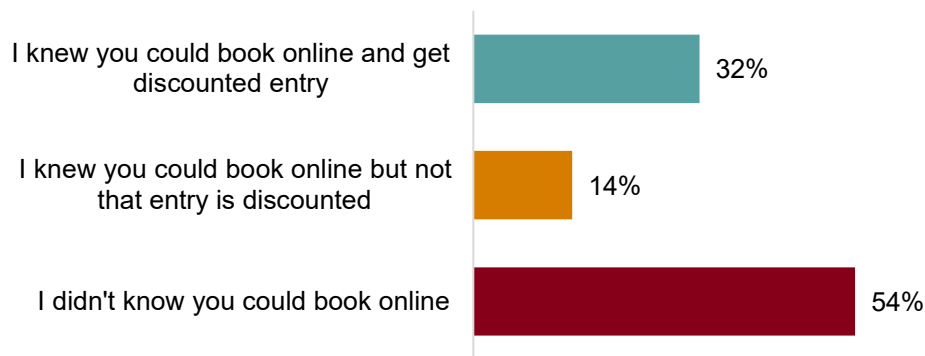
Q10 has been asked only to families visiting with children

Differences in results from autumn 2024 and summer 2022

- 4.9 For approximately half (46%) of visitors with children, the emphasis is more on learning than fun. This is much lower than in autumn 2024 (when 66% placed more emphasis on learning) but higher than in summer 2022 (39%).
- 4.10 The highest levels of emphasis on learning are found at:
 - Tintern (60%)
 - Caernarfon (57%)
 - Conwy (57%)
- 4.11 The highest levels of emphasis on fun are found at Laugharne (all) and Castell Coch (73%).
- 4.12 Results do not vary significantly by whether the children are older or younger.

Awareness of online discounted entry

Figure 7: Q12 “Did you know you could book online and get discounted entry?”



Base: 2,435

'Answers of 'not applicable: I already got free or discounted entry' have been excluded

Low awareness of booking online

4.13 A minority (32%) were aware at the time of interviewing that they could book online and get discounted entry. Many (54%) did not even know they could book online. This is a new question and so there are no comparable results from earlier surveys.

4.14 The highest proportions of those aware they could book online and get discounted entry are found among:

- Families with children (36%) compared to parties with no children (28%)
- Visitors to Kidwelly (42%) and Castell Coch (39%)
- Visitors from Wales (37%) compared to UK outside Wales (32%) and overseas (26%)
- Repeat and lapsed visitors (35%) compared to new visitors (30%)

4.15 Awareness does not vary significantly by age.

Pre-visit information needed and experiences of finding it

4.16 Visitors have been asked the open question, 'What information did you need to plan your visit? Where did you look for the information, and were you able to find it?'. Below we discuss the main themes.

What information do visitors seek?

4.17 The following pieces of pre-visit information are frequently sought:

- Opening times (or if the attraction is even open)
- Directions
- Parking

- Prices, including whether certain demographics get free or discounted entry

“Opening times and student discount; we used the Cadw website”

Adult relatives, SE Wales, Caernarfon

4.18 The following pieces of information are sought only by a small minority, but if it matters, it can matter enough to make or break a possible visit:

- Accessibility provision
- Whether dogs are allowed
- How to get there by bus

“Children with disabilities and we needed to plan the route through Google maps. The Cadw website was easy to find and good for information.”

Family with young children, SE England, Conwy

“That we could bring the dog and my father's mobility scooter”

Family with young children, SW Wales, Kidwelly

“Castle website to check it was dog friendly. We knew in advance we could only take him in certain areas.”

Family with young children, SE England, Caerphilly

4.19 Relatively isolated examples of information sought include:

- Whether there is a café
- Whether there are toilets
- Pictures of the attraction
- Overview of the site's history

Many visitors just turn up however

4.20 Many visitors do not seek any pre-visit information. They simply turn up. Reasons include:

- They feel they already know enough about it from previous visits or from living in the area
- They see it when passing and make an impromptu decision to go in

“We came on a whim as we were already in Beaumaris”

Couple, NW England, Beaumaris

“We just rocked up”

Family with older children, SE Wales, Conwy

“Didn't need to plan. I knew about the place from my childhood.”

Friends, NW England, Harlech

Where do they seek the information?

4.21 There are two key sources of information which stand out, with one often leading to the other:

- Google
- Cadw website

4.22 Sometimes a Google search is the inspiration for a place to visit, with search terms along the lines of 'castles in north Wales'. This type of search often leads visitors to the Cadw website, or as some phrase it, the 'castle website'. However they perceive it, the Cadw / 'castle' website is felt to be an authentic source of information they can trust.

"We looked for location, the history of Tintern Abbey, opening times and café ... Google took us to the Cadw site ... we were able to find all the information"

Couple, NW England, Tintern

"Google maps to find castles in South Wales"

Family with young and older children, SW England, Kidwelly

"Google maps: this castle was the closest on the map"

Family with young children, East of England, Harlech

4.23 If Google is consulted again after landing on the Cadw website, it is commonly used for directions (Google maps), having sought and found a post code to aim for on the Cadw website.

4.24 There are a few other sources of information mentioned by more than just a few visitors:

- Guidebooks and leaflets – often left in accommodation in the area, or a guidebook may have been purchased in advance
- Visit Wales website – often found through Google
- People who recommended the attraction in the first place, e.g. a friend, relative or someone in the area such as the accommodation provider; the person doing the recommending will often pass on key pre-visit information

"We are staying at a campsite and the castle leaflet was there with all the info we needed"

Family with young children, NW England, Caernarfon

"The Cadw map of the site was left in our holiday cottage. It looked a nice place and the map was easy to use."

Couple, SE England, Tintern

4.25 A few visitors say they planned their trip using AI.

"We planned our full trip with AI. We just put in what to do today and it brought up a full itinerary with times and everything."

Friends, SW England, Tintern

"We used ChatGPT for parking but it didn't give us the right information. We got lost."

Family with older children, Belgium, Caerphilly

- 4.26 One further point to note is that only a few visitors have mentioned TripAdvisor or online reviews. Whether or not visitors seek reviews before coming was not specifically prompted, but it has rarely been mentioned unprompted.

Do visitors find the information they need?

- 4.27 Yes, the Cadw website is very clear for those who use it. Hardly a negative comment has been made about it. Just a few visitors to Caerphilly have said that the parking information is not clear enough (and some other visitors to Caerphilly also add that they didn't know where to park).

"We Google searched opening times, prices, what facilities there are here and found the Cadw website. It was easy to find the information."

Couple, SW England, Raglan

"Parking was an issue. We couldn't find any details on the website about parking."

Couple, USA, Caerphilly

"Online could have better guidance on the closest car park. We had to park quite far away and some of the signs are covered with trees."

Family with young children, SE Wales, Caerphilly

- 4.28 The issue with visitors lacking the pre-visit information needed seems to be among those who thought they didn't need to know anything and then they get taken by surprise, e.g. they can't find anywhere to park or they turn up and find the attraction under scaffolding. Some admit they wish they had done their homework before visiting.

"We didn't plan, but should have done as we struggled to find parking"

Friends, Canada, Caerphilly

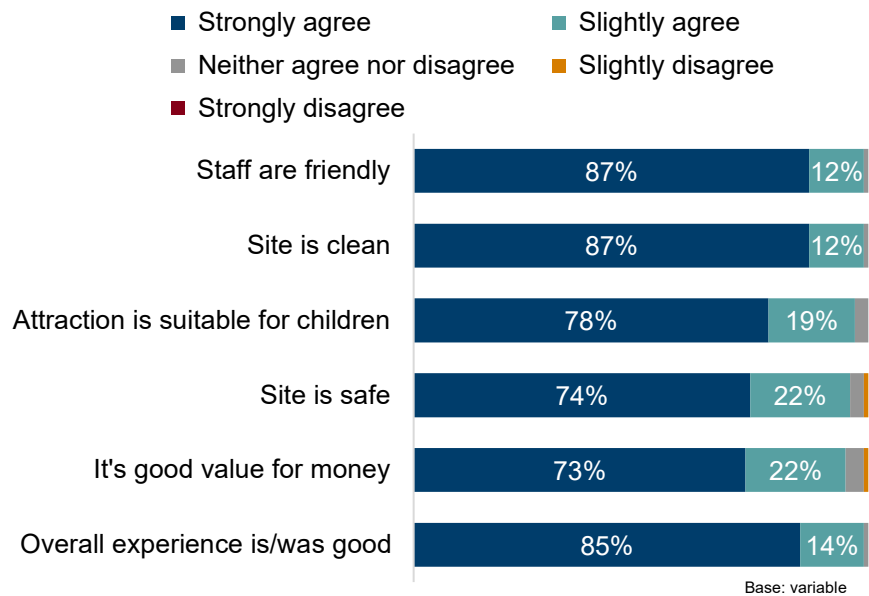
"If we had checked the website, we would have known the scaffolding was here"

Couple, SW England, Tintern

5. Visitor experience

Rated aspects of experience: all sites combined

Figure 8: Q13 “How much do you agree or disagree with each of the following aspects of your visit to this attraction?”



‘Not applicable’ answers have been excluded and percents re-based

Very high levels of satisfaction

- 5.1 Cadw sites are very highly rated in many ways, especially the friendliness of the staff and the cleanliness of the sites. The very high ratings are consistent across all visitor types.
- 5.2 Findings are similar to autumn 2024. Satisfaction prior to the autumn 2024 survey was asked using a different scale and so results are not directly comparable.

“I thoroughly enjoyed it all. I passed here many years ago and wanted to come back, travelling from Australia.”
Couple, Australia, Tintern

“I have enjoyed everything. I honestly do not have any negativity.”
Couple, SE Wales, Castell Coch

Rated aspects of experience: ratings by site

- 5.3 If answers are converted to a 5-point rating scale (‘strongly agree’ = 5, ‘agree’ = 4 etc), the following table shows how the different sites compare on each aspect:

Table 4: Aspects of each site on 5-point scale

Site	Overall	Value for money	Friendliness of staff	Cleanliness	Suitability for children	Safety
Beaumaris	4.8	4.6	4.8	4.9	4.8	4.7
Caernarfon	4.8	4.7	4.9	4.9	4.7	4.5
Caerphilly	4.9	4.8	4.9	4.9	4.8	4.8
Castell Coch	4.9	4.8	5.0	5.0	4.9	4.8
Chepstow	5.0	4.8	4.9	4.9	4.8	4.8
Conwy	4.7	4.5	4.6²	4.7	4.5²	4.5
Harlech	4.7	4.6	4.8	4.8	4.6	4.6
Kidwelly	5.0	5.0¹	5.0	5.0	4.9	4.8
Laugharne	5.0	4.7	5.0	5.0	5.0¹	4.9
Raglan	4.9	4.7	4.9	4.8	4.8	4.7
Tintern	4.8	4.6	4.9	4.9	4.7	4.9
Overall	4.8	4.7	4.9	4.9	4.7	4.7

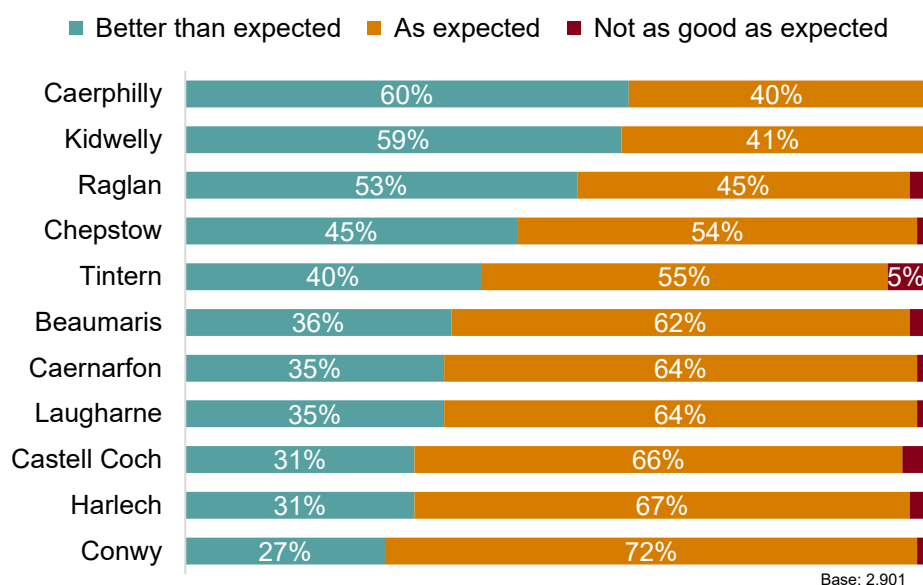
1. Figures shown stand out as particularly above average for that experience aspect.

2. Figures shown stand out as particularly below average.

5.4 We explore experiences by site in more detail under Q23 below.

Experiences compared to expectations

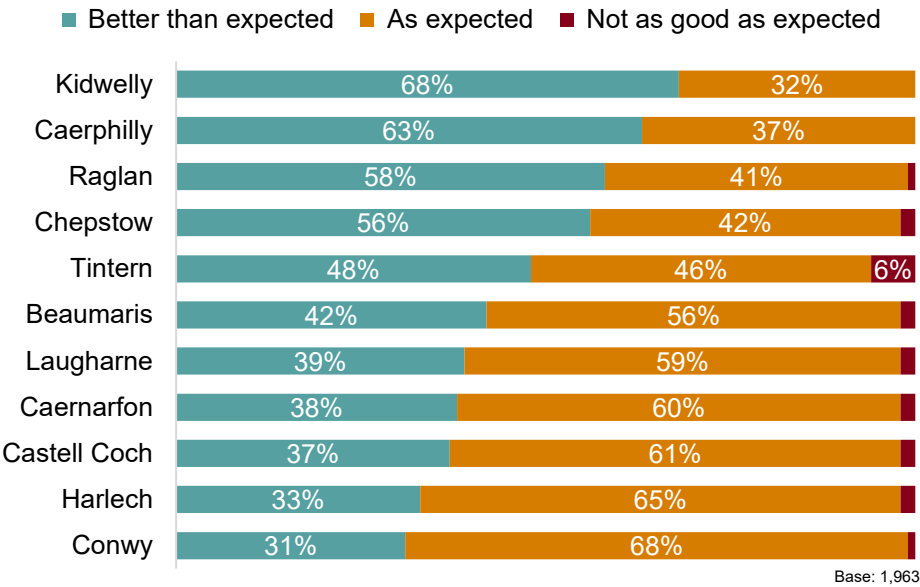
Figure 9: Q23 “How does your experience here today compare to your prior expectations?”



Visits to Cadw sites perform very well compared to prior expectations

- 5.5 Overall, about two in five (39%) visitors describe their experience as ‘better than expected’, and nearly all of the remainder (59%) describe it ‘as expected’. This compares to the autumn 2024 survey, when 51% of visitors described their experience as ‘better than expected’, and 48% described it ‘as expected’.
- 5.6 Whilst the proportion of experiences exceeding expectations has declined, Cadw has been aiming for this through more informative pre-visit information because too many potential visitors might be getting missed due to prior expectations being too low (and therefore some don’t visit at all).
- 5.7 Extensive work on renovations and new interpretation at Caerphilly Castle was completed in time for the summer season, and this shows in the results, as Caerphilly comes out top in terms of visits exceeding expectations.
- 5.8 Answers vary significantly by new / lapsed / repeat visitors. 44% of new visitors and 32% of lapsed visitors have answered ‘better than expected’. This compares to 25% of repeat visitors, who generally know what to expect.
- 5.9 41% of those visiting without children have answered ‘better than expected’, which compares to 36% of families with children. Answers do not vary significantly by visitor origin. The chart below shows answers given by new visitors:

Figure 10: Q23 (New visitors) “How does your experience here today compare to your prior expectations?”



5.10 Tintern is the only site to attract more than 2% of new visitors saying the visit was ‘not as good as expected’ (see ‘Effects of construction’ below).

Effects of construction on experience

Figure 11: Q16 (Tintern Abbey and Castell Coch) “How, if at all, has the onsite construction affected your experience today?”



Some effect of scaffolding at Tintern Abbey, but much understanding shown

5.11 The highlight of Tintern Abbey is the church part of the site. Part of it is currently closed whilst scaffolding stands for conservation work.

- 5.12 38% of visitors to Tintern say this has affected their experience slightly, and 11% say it has affected their experience negatively. Open comments however generally show that they understand conservation work needs to be carried out.

“I thought construction would affect the visit more”
Couple, SE England, Tintern

“Construction affected photo shots”
Family with young children, Germany, Tintern



Church area with conservation work and information panels at Tintern

Some impact at Castell Coch too

- 5.13 Castell Coch also currently has scaffolding, which has a decorative wrap. No areas are closed off to visitors, although online reviews show that some visitors mistakenly think some parts are. 48% of visitors to Castell Coch say the onsite construction has affected their experience slightly, and 5% say it has affected their experience negatively.



Decorative scaffolding wrap at Castell Coch

Reasons for positive experiences: overall

- 5.14 Firstly we discuss common positive experiences that are generally found across many sites before discussing themes that are specific to one site.

Freedom to roam, climb up high and enjoy the views

- 5.15 It is noticeable that when asked for the best part of the visit, open comments are dominated by experiences of being able to climb up high onto castle walls and enjoy the views. The freedom to roam in this way without having areas cordoned off or a prescribed route is a key reason for many experiences exceeding expectations.
- 5.16 Learning about the site's history matters to an extent, but the outdoor roaming and enjoying views from up high is more memorable for many.

"Freedom to roam in the castle and not having to follow a route"

Family with young children, NW England, Caernarfon

"I wasn't expecting the castle to be as well preserved as it is or that I would be able to explore as much of it as I have"

Lone visitor, New Zealand, Conwy

"The views are absolutely stunning, breathtaking; fantastic photo shoots"

Couple, SE Wales, Chepstow

'I didn't think it would be this big'

- 5.17 One of the most common reasons for the visit experience exceeding expectations is that the castle or abbey turns out to be much bigger than the visitor expected. In some cases, the expectation comes from looking at pictures, with some visitors saying that the pictures they saw don't do the site justice.

"It's so huge! It's surprisingly extensive."

Family with older children, East of England, Caernarfon

"It's like a Tardis. It's huge!"

Family with young children, Beaumaris

'I thought it would just be ruins'

- 5.18 Another common reason for visit experiences exceeding expectations is that they didn't realise the castle or abbey would be so intact and well preserved. Some even comment they thought it would 'just be ruins', making comparisons with castles and abbeys in England and Scotland.

“I thought it would be more ruinous”
Family with young children, NW England, Caernarfon

“In my head it was not so much as it is. English Heritage have some abbeys where it’s just a hole in the ground.”
Couple, West Midlands, Tintern

Audio guides and learning about history

- 5.19 Learning about the site’s history is the most memorable experience for some, although they tend to be in the minority. For sites which have an audio guide, this sometimes makes for a memorable experience.

“I like that it covers a wide range of history rather than just focusing on one major moment.”
Friends, London, Conwy

“The audio experience enhanced my understanding of the local history”
Couple, SE Wales, Castell Coch

Provisions for accessibility and income needs

- 5.20 Making heritage sites accessible to all is a key aim of Cadw, and when visitors with particular needs see that investments have been made to support them or the staff show understanding, this makes a visit very positive and memorable.

“For accessibility, this site is excellent. With the lift, we’re able to access the heights.”
Family with young children, SE England, Caernarfon

“We had reduced entry as we are on universal credit, which is excellent”
Family with young children, NW England, Caernarfon

“Very supportive staff at the desk as have a disabled party member”
Family with older children, Conwy

Beaumaris

Having fun with the building blocks

- 5.21 Some visitors are entertained by the castle building blocks. Our observational research in 2024 showed that some dads also enjoy playing with the blocks.

“We liked the children’s build a castle”
Family with young children, NW England, Beaumaris



Castle play blocks and AV space at Beaumaris

Not overly commercialised

- 5.22 Beaumaris does not have the recent investment in interpretation that some Cadw sites have such as nearby Caernarfon. Some visitors say they like it this way: they prefer heritage sites to be left largely as they are.

“We like that it really hasn’t changed and it’s not overly commercialised”
Couple, NW England, Beaumaris

“I didn’t really know what to expect. We visited a castle in Kent and it was too commercialised.”
Family with older children, East of England, Beaumaris

Further positives

- 5.23 Visitors also like the reverb they experience in the chapel, and the fact that the moat contains water (not all castle moats do anymore).

“The moat has water and you can imagine a lot with what is here”
Couple, SE England, Beaumaris

Caernarfon

New interpretation

- 5.24 Significant recent investment has been made into developing Caernarfon, and the part which stands out the most is the King's Gate roof. The lift makes the features and the views here accessible to more visitors.

“I like the adaptations they have made over the past two years”
Family with young and older children, North Wales, Caernarfon



King's Gate roof at Caernarfon



Further positives

- 5.25 The museum and the Eagle Tower are also mentioned often as the most memorable parts.

"The installation on the second floor in the Eagle Tower is stunning"
Lone visitor, SW England, Caernarfon

Caerphilly

Investment in new interpretation pays off

- 5.26 Many visitors to Caerphilly have been taken by surprise at how much better the experience is compared to what they expected. This applies to both new and repeat visitors. They can tell that a significant amount of money has been spent on improving the attraction. Some say that website pictures don't do it justice.

"Fabulous compared to how it was"
Adult relatives, SE Wales, Caerphilly

“Impressed with how the money has been spent”

Family with young children, SE Wales, Caerphilly

“Online pictures didn't do the restoration and vibrant rooms justice”

Adult relatives, SE England, Caerphilly

“We’ve seen pictures online and we were unsure what to expect but it has been far more impressive than I expected”

Family with young children, SW England, Caerphilly

5.27 The stand-out feature seems to be the animation in the Great Hall.

“It’s blown me away, 10 out of 10. I’ve been to a few castles recently but here they have the animated characters and it was great to see.”

Couple, SW Wales, Caerphilly

“The animated characters telling the history rather than boards and panels with text”

Family with young and older children, SE England, Caerphilly



Animation on a wall of the Great Hall at Caerphilly

5.28 Further favourites out of the many new features include:

- Castle model with animated battle scene
- Dressing up costumes
- Dragons (were there before but have been improved)
- Wildflower garden

“3D model of the castle under attack and all the animated visuals”

Family with young children, SE Wales, Caerphilly

“Children able to dress up – it’s ‘Do Touch’ rather than ‘Don’t Touch’”

Family with young children, SW England, Caerphilly

“Great first impression with the dragons and storytelling”

Family with young children, SE England, Caerphilly

“The wildflower garden really surprised us, very nice”

Couple, SE Wales, Caerphilly



Animated battle using a 3D castle model at Caerphilly

Castell Coch

Eye-catching décor in the rooms

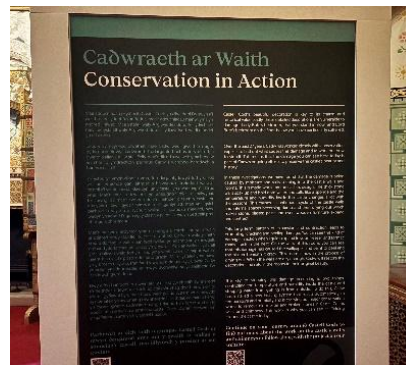
- 5.29 As reported in previous surveys, many visitors to Castell Coch are taken by the décor in the rooms. They like seeing the ornate ceilings, the period furniture and outfits. This all helps them to imagine life for the people who lived there.

“Superb interior: ornate and unique”

Friends, SW England, Castell Coch



Lade Bute's bedroom at Castell Coch



Fairytale appearance

- 5.30 Castell Coch with its conical turrets has a 'fairytale' appearance which can be seen far down below from the passing motorway and dual carriageway. This grabs people's attention.

"Always enjoy it here ... fairytale castle"

Adult relatives, SE England, Castell Coch

- 5.31 There is currently scaffolding around one of the towers but some visitors like the artwork surrounding the scaffolding.

Chepstow

Games for children

- 5.32 Many families visiting Chepstow appreciate that Cadw has invested in the experience for children by providing a trail with games.

"I didn't think the visit would last long with a young one, but we found enough to do, like the games set up on the field ... corn bags"

Family with young children, SE Wales, Chepstow



Part of the children's quest at Chepstow

Conwy

As with other sites

- 5.33 Positive comments about Conwy are consistent with other sites, i.e. some visitors are surprised to find it is bigger and more intact than expected. They enjoy accessing all parts and admiring the views when up high.

"We don't have big impressive castles in Holland"
Couple, Netherlands, Conwy

"I am just blown away by the well kept architecture"
Adult relatives, SE England, Conwy



East Barbican at Conwy Castle

Harlech

Has some unique features

- 5.34 Harlech has an accessible bridge, which not only makes the site accessible to more visitors, but some also appreciate looking at the architecture. Harlech is also one of few Cadw sites to have a café. It is highly rated.

"It's better now because I can get into the castle in my chair scooter"
Family with young children, NW England, Harlech

"The views and breakfast at the onsite café. Delicious!"
Couple, SE England, Harlech



Café and bridge at Harlech

Kidwelly

As per other sites

- 5.35 The main positive factors influencing experiences at Kidwelly are consistent with other sites: bigger and more intact than expected, with the freedom to roam up high and enjoy the views.

“From outside it doesn't give the impression that there's so much to explore”
Couple, SE England, Kidwelly

“A hidden gem which is undersold”
Family with young children, SW England, Kidwelly

Laugharne

Garden games for children

- 5.36 Visitors have been very satisfied with their trip to Laugharne this summer, and one of the key reasons is the entertainment laid out in the gardens. This appeals to children but also to some adults, and the outdoor setting is pleasant to relax in.

“The best part is the games in the garden”
Family with young children, SW England, Laugharne

“Views of the bay are superb”
Couple, SW Wales, Laugharne

Raglan

As per other sites

- 5.37 The positive experiences at Raglan are consistent with other sites. Access to the top of the highest tower provides magnificent views of the surrounding scenic area.

“I didn’t think it was going to be this big. Lots of parts to explore. The panoramic scenery is lovely.”

Family with older children, USA, Raglan

“I thought it was going to be a smaller castle. Lots to see. You can walk round pretty much all of it, even outside. Lots of freedom.”

Couple, NW England, Raglan



Gatehouse viewed from the entrance to Raglan

Tintern

Peaceful and reverent atmosphere

- 5.38 Tintern Abbey differs from the castles in that it was originally a devoted place of worship. This gives it a different kind of atmosphere: a peaceful, meditative kind of place, rather than kings, knights and battles. The setting by the river (Wye) in a valley adds to the tranquillity.

“Peaceful, magical and spiritual”

Adult relatives, SE England, Tintern

“Tranquillity and just sitting here ... it’s very spiritual and inspiring”

Couple, undisclosed residence, Tintern

- 5.39 The church part of the abbey is the most popular feature, which is why the current scaffolding tarnishes the tranquil experience for some.

Least enjoyable aspects of the visit: general

- 5.40 Firstly we discuss common disappointments that are generally found across many sites before discussing themes that are specific to one site.

Lack of information / different formats of interpretation

- 5.41 Not many visitors are disappointed by their experience to Cadw sites. If they are, then one of the reasons not specific to any particular site is that they wanted more detailed information about the site, how people lived and what it might have looked like at the time.

“The least enjoyable part is the lack of information”
Friends, London, Conwy

- 5.42 Some would have liked more written information panels. Others say the lack of written information is not necessarily the issue, rather the lack of interpretation in different formats, as not everyone likes reading.

“Not really something my son is interested in. Could do with audio tapes.”
Family with older children, SW England, Beaumaris

“It needs more interactive features ... where kids can learn their own way ... I was trying to get them to read the boards. They weren't interested.”
Family with young children, SW England, Harlech

No café

- 5.43 Most Cadw sites do not have a café, and this leaves some visitors feeling disappointed.

“No coffee shop, which is disappointing”
Family with young children, SE Wales, Caerphilly

Beaumaris

Lack of shelter when raining

- 5.44 Some of the interview shifts at Beaumaris this summer took place on days of bad weather, and this has highlighted the need for more shelter from the rain.

“The least enjoyable aspect is the lack of shelter if it's raining”
Family with young children, NW England, Beaumaris

Lack of seating when busy

- 5.45 Beaumaris could do with more places to sit when the site gets busy.

“The least enjoyable aspect is the lack of benches when it gets busy”
Family with young children, North Wales, Beaumaris

Caerphilly

Some issues with audio features

- 5.46 Among Caerphilly’s new interpretation, there are some rooms which have audio playing. During busy times, some of these rooms can become quite noisy with echoes and different conversations going on, leaving visitors unable to hear the audio properly. However this is a hard balance to strike, as some say they don’t want the sound to be overbearing either.

“The sound could be turned up in some rooms. You can’t always hear it when the room is busy or if people are loud.”
Family with young children, SE Wales, Caerphilly

“Audio component was a bit much sometimes, or too echoey”
Couple, NW England, Caerphilly

Castell Coch

Construction works

- 5.47 As discussed, the construction work at Castell Coch is tarnishing the experience for some visitors.

“All has been enjoyable, except the scaffolding. However we understand why it’s needed.”
Friends, SE England, Castell Coch

Chepstow

No toilet

- 5.48 Chepstow Castle has no onsite toilet. The nearest one is across the other side of the car park, but getting back into the castle after using it involves walking up a fairly steep hill.

“The lack of bathrooms: they are in the car park”
Couple, USA, Chepstow

Children's information is good, but adults want some too

- 5.49 Whilst the improvement in interpretation for children is appreciated, some adults now say there needs to be more for them.

"Lots of information boards here but many are for kids. That's great, but adults come too."

Lone adult, Yorkshire, Chepstow

"The general dumbing down of the castle is not so good"

Lone adult, SE Wales, Chepstow

Conwy and Kidwelly

As with other sites

- 5.50 Suggested improvements at Conwy and Kidwelly are as with other sites in general, i.e. more interpretation in various formats would be appreciated.

"As a person very interested in history, it would be nice if some of the signage [information panels] had more detail to further educate and celebrate the site"

Friends, USA, Conwy

"Some information in the rooms, e.g. how they cooked in the kitchen and with what"

Family with older children, SW England, Kidwelly

Harlech

Parking stress

- 5.51 Some visitors head for the closest car park, which is small, and they don't see the signs to a much larger car park that is also within walking distance of the castle.

"The parking info needs to be clear. In the past we have turned up and driven away because it wasn't mentioned about other car parking."

Family with young children, NW England, Harlech

Information is all in one place and the area can get crowded

- 5.52 The written information at Harlech is mostly in one place (due to how it was funded), rather than dispersed around the site. The area can get crowded, making it hard to read the information. Some visitors also get confused about the order in which they are supposed to read the panels.

“The info boards need to be put in a better order as it’s confusing”
Family with older children, East Midlands, Harlech

Laugharne

No toilets onsite

- 5.53 Some visitors say they would have appreciated an onsite toilet so that they didn’t have to leave the site.

“Lack of toilets”
Couple, East Midlands, Laugharne

Raglan

Poor toilets

- 5.54 At Raglan, the toilet issue is not that there are no toilets, rather the quality of the current ones is poor. Cadw is aware of this issue, but the cost and work involved to provide a good solution is extensive.

“The toilets are small and inadequate: smelly, one cubicle and one urinal in the gents”
Family with young children, Vietnam, Raglan

Tintern

Scaffolding

- 5.55 As with Castell Coch and as discussed, visitors to Tintern understand that conservation work needs to happen but it takes the shine off the visit for many.

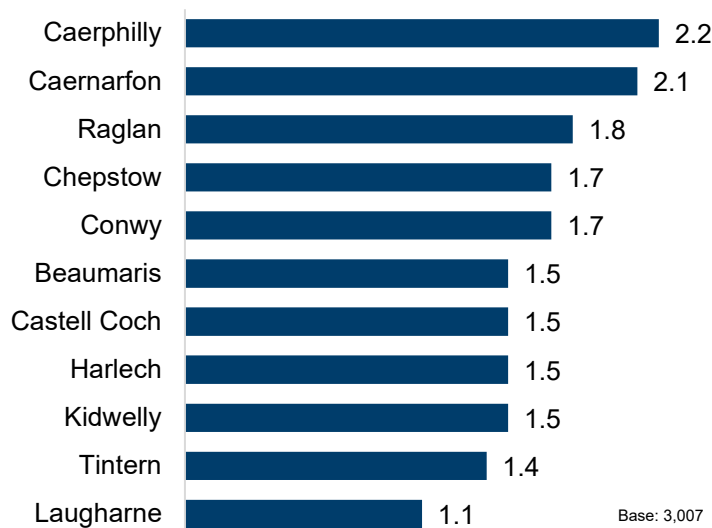
“The scaffolding gets in the way of photos. I had to crop it out.”
Lone adult, West Midlands, Tintern

6. Interpretation and dwell time

Dwell time

Figure 12: Q16 “How long did you spend / do you expect to spend at the castle (or abbey) today?”

Approx. mean time shown in hours

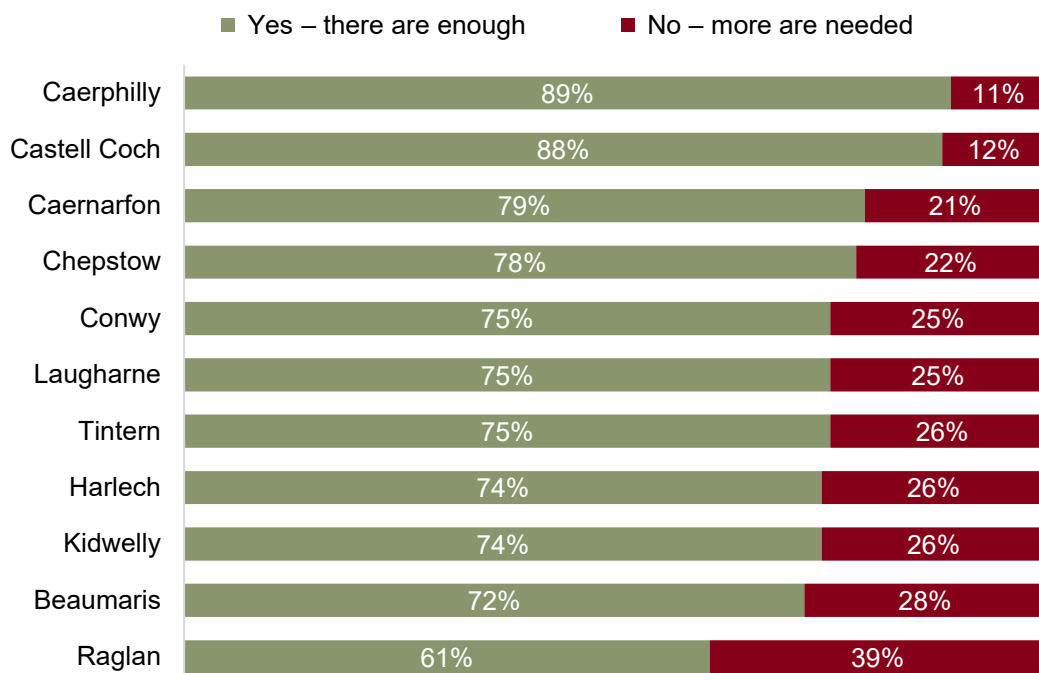


Significant increase in dwell time at Caerphilly

- 6.1 On average, visitors to Cadw sites in summer 2025 have spent or intended to spend about 1¾ hours there. This is an increase on the 2022 summer survey (1.5 hours). The largest increases in dwell time by site have been seen at:
- Caerphilly (+0.6 hours)
 - Conwy (+0.4 hours)
- 6.2 Following significant investment, interpretation at Caerphilly has changed beyond recognition and this shows in the dwell time.
- 6.3 Results do not vary significantly by visitor type.

Information boards

Figure 13: Q17 “Are there enough written information panels for you to be able to understand the usage and history of this site?”



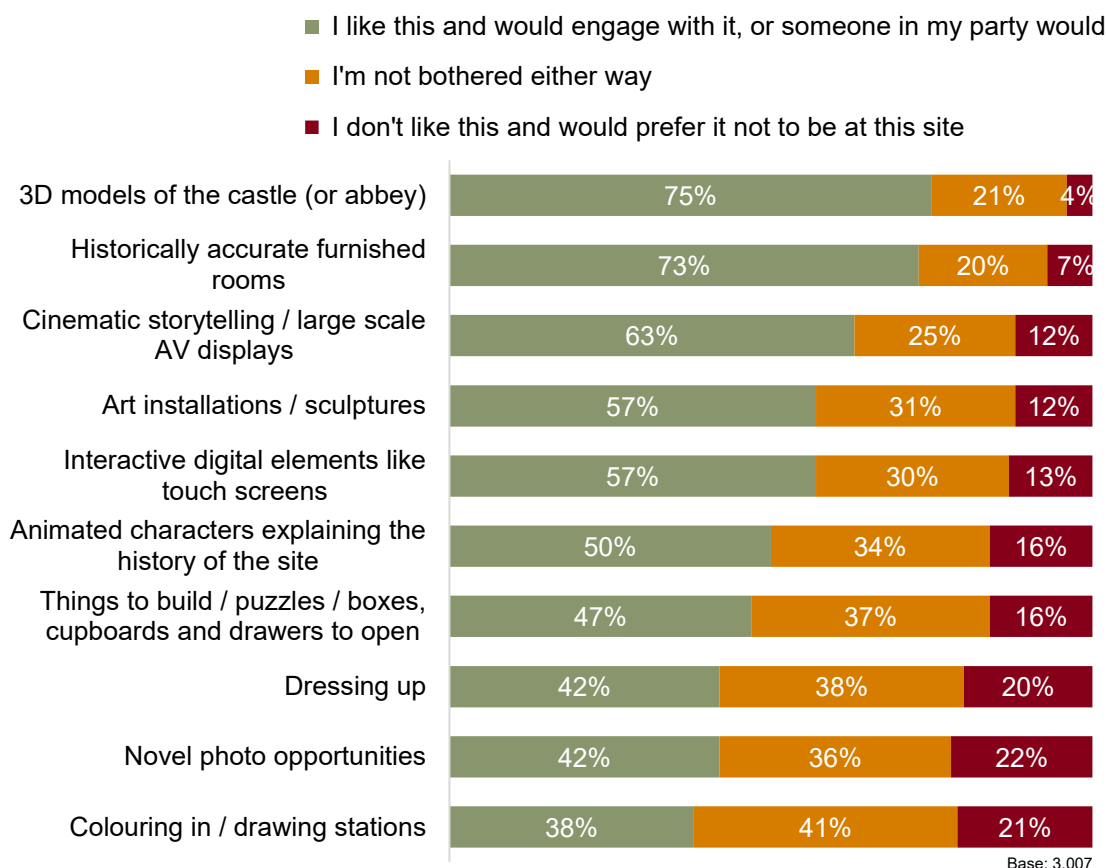
Base: 2,823

Good level of information overall, but more can be done

- 6.4 Overall, about three quarters (76%) of visitors feel there is enough written information. This goes some way towards satisfying visitors' information needs, but most sites need more. Also, not all visitors like interpretation in written form and so answering that there is 'enough' written information does not necessarily mean that information in other forms is not required.
- 6.5 Caerphilly fares very well. Much of the new interpretation following significant investment is in non-written formats and so this perhaps 'takes the pressure' off written format to meet visitors' information needs.
- 6.6 Similarly, Castell Coch, Caernarfon and Chepstow all have an audio guide, which may have influenced the result to this question if visitors feel they already got enough information from that.
- 6.7 Raglan stands out at the bottom as needing more information.
- 6.8 Answers do not vary significantly by party type.

Different formats of interpretation

Figure 14: Q18 “How do you feel about each of the formats of interpretation below?”



3D models

- 6.9 There are many ways in which Cadw can invest in interpretation beyond written format. At the top of the preferences in terms of frequency of visitors who would engage with it is ‘3D models of the castle (or abbey)’. Previous focus group research with visitors to sites which have a model supports this finding. Many visitors like being able to see an overview of the castle as it helps them to make sense of the real life-size castle and how to find their way around it. The model can help them spot parts they have missed.

“When you’re there, you can’t see everything at once, but when you see the model, you can see the symmetry, the awesomeness of the build, and we also saw parts that we hadn’t seen [for real] and so went back out and saw them.”

Family without children, SW England, Harlech (taken from previous focus group research)

Furnished rooms

- 6.10 Previous Cadw research has shown that physical room constructions are preferred to artistic impressions, which in turn are preferred to digital reconstructions. We explore this in more detail next under Q19.

Many differences between families with children and parties without

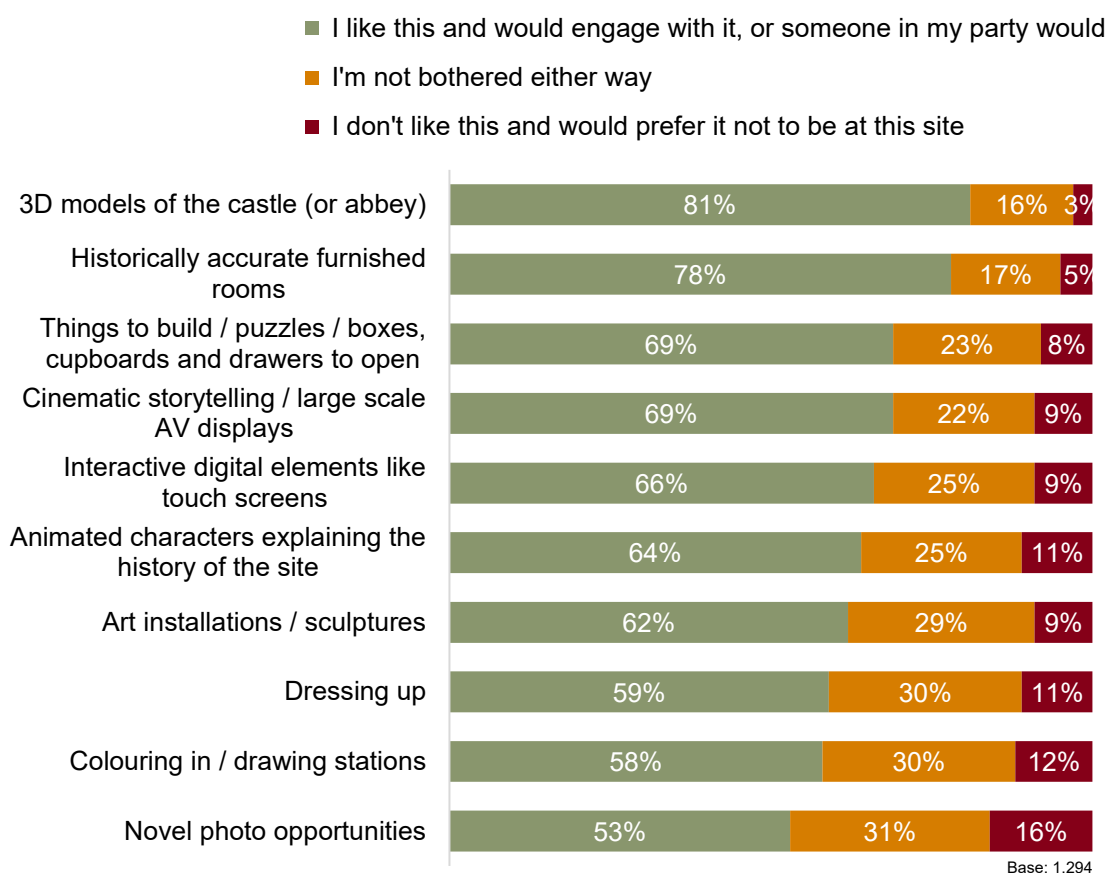
- 6.11 Whether or not a party includes children makes a significant difference in answers to most of the above interpretation ideas. Families with children typically want more of everything, whereas parties without children have sometimes answered that they would prefer something not to be at the site. Some open comments have been made by parties without children that they don't want historic sites turned into 'theme parks'.

"I don't want it fully reconstructed. It's not a theme park."
Couple, SE Wales, Conwy

"I like the views and the authenticity ... it's good that it's not a theme park"
Couple, USA, Conwy

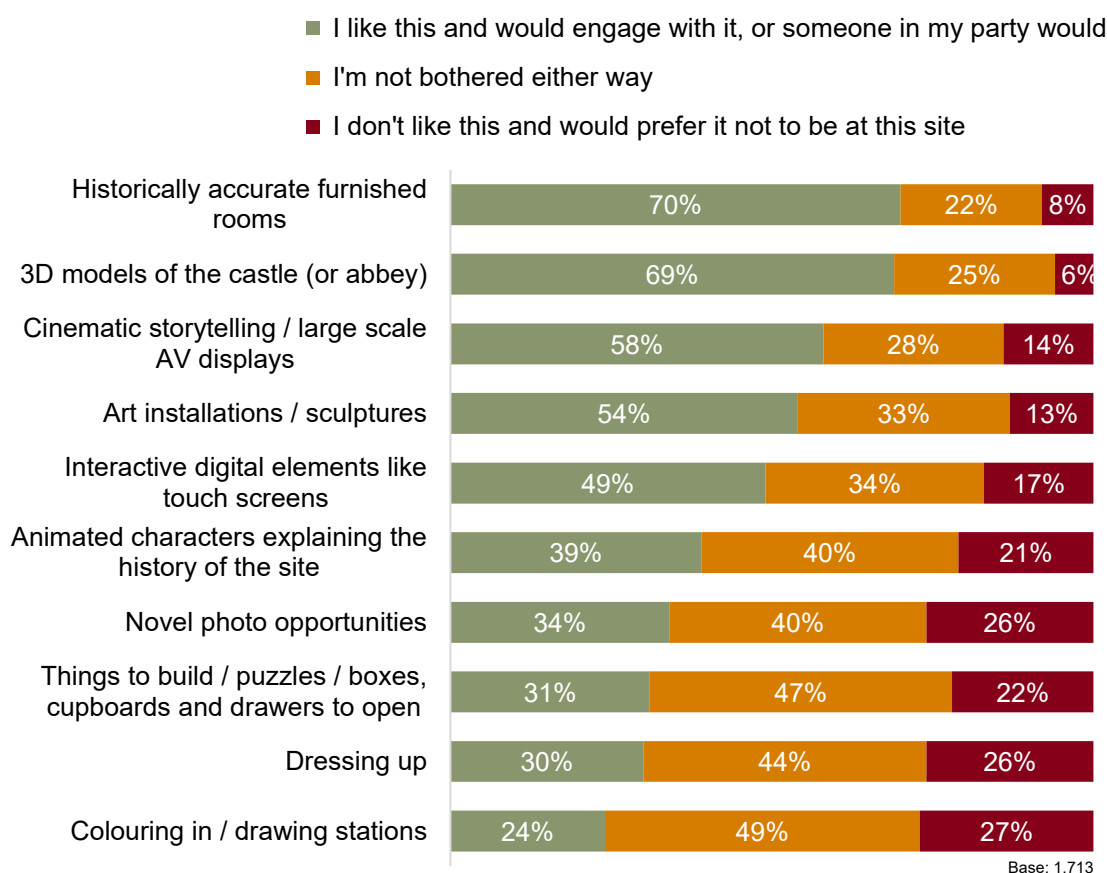
- 6.12 The charts below show the answers from families with children, followed by parties without children:

Figure 15: Q18 (Families with children) “How do you feel about each of the formats of interpretation below?”



The above chart shows the answers given by families with children

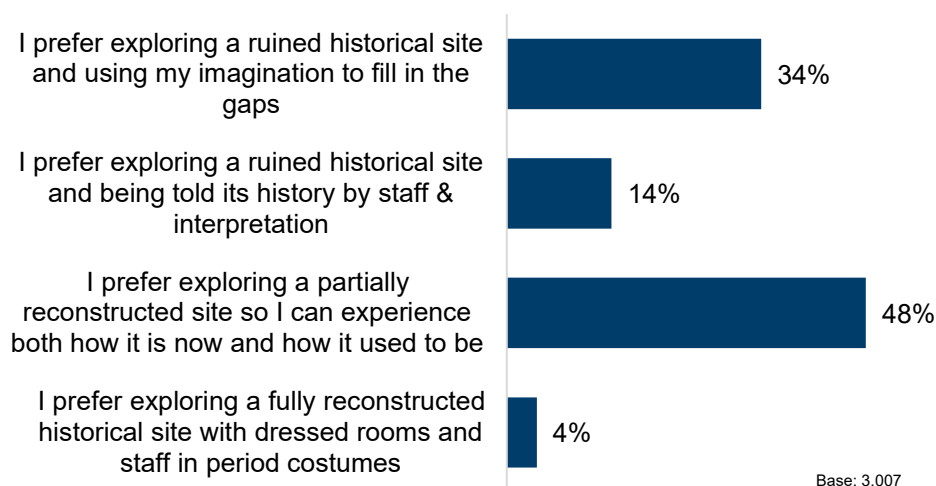
Figure 16: Q18 (Parties without children) “How do you feel about each of the formats of interpretation below?”



The above chart shows the answers given by parties without children

Reconstruction preferences

Figure 17: Q19 “Do you prefer visiting a historic site that is preserved as it is or one that has been restored to its original look?”



Differences in preference

- 6.13 The answers to the above question present a challenge for Cadw because preferences are divided over whether sites should be partially reconstructed or left as they are. Visitors of both preferences can be quite critical of historical sites if their preference is not met. Those favouring reconstruction may feel let down on value for money if they are left looking at bare rooms, but those wanting bare rooms left as they are do not want the site spoilt by changes.

“It would be great to have a furnished room to see what it was like”
Couple, Canada, Chepstow

“Don’t need everything here. I like that there are no digital elements so we can use our imagination.”
Couple, SW England, Chepstow

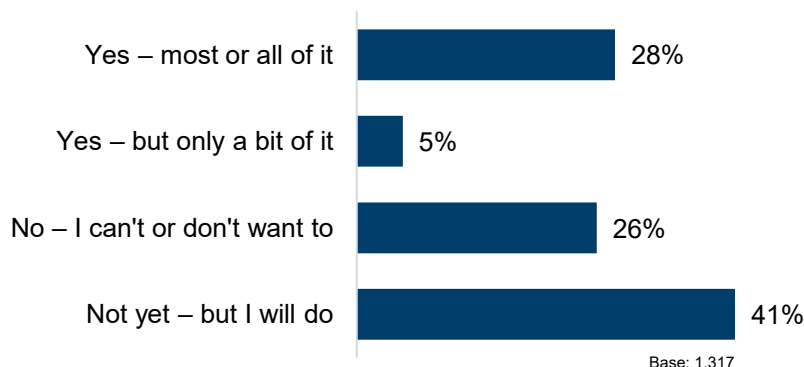
- 6.14 Results do not differ significantly by party type.

- 6.15 Whilst the substantial investment in interpretation at Caerphilly has resulted in many highly satisfied visitors, some have come away saying the changes have gone too far.

“I wouldn’t want it [Chepstow] as interactive as Caerphilly, which was a bit too much”
Family with young children, SW England, Chepstow

Watching the video

Figure 18: Q20 “Have you watched the video?”



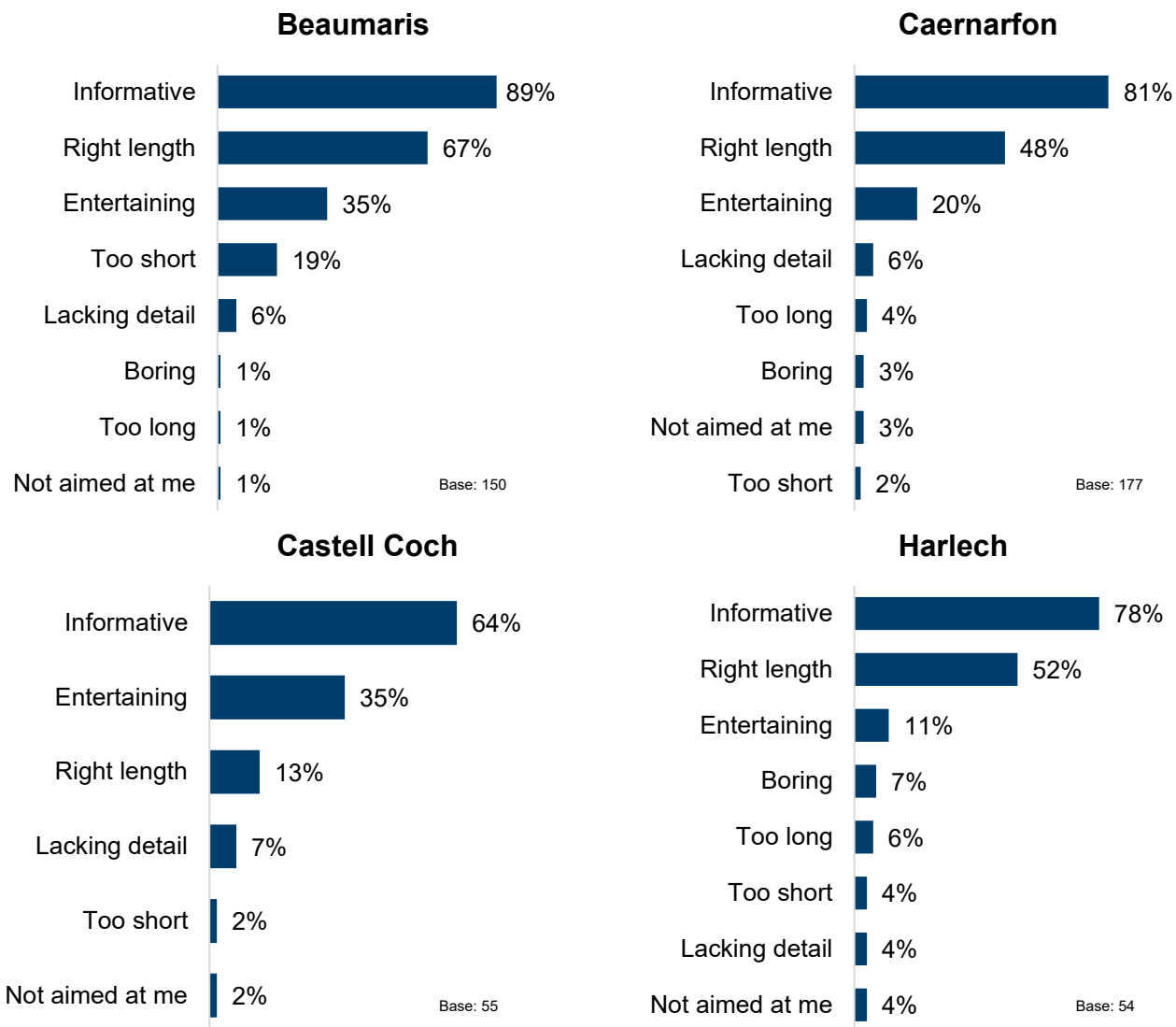
Q20 has been asked to visitors at Beaumaris, Caernarfon, Castell Coch and Harlech

Majority watch or intend to watch videos on offer

- 6.16 About three in four (74%) visitors to the four sites which have an introductory video have either watched or intended to watch it. This differs significantly by site. Many (59%) visitors to Harlech have answered ‘I can’t or don’t want to’. In peak season, there is sometimes a lack of space / seating there to watch the video.

Feedback on the video

Figure 19: Q21 “What did you think of the video?”



Q21 has been asked to those answering they had watched at least some of the video (Q20)

Positive feedback at all four sites

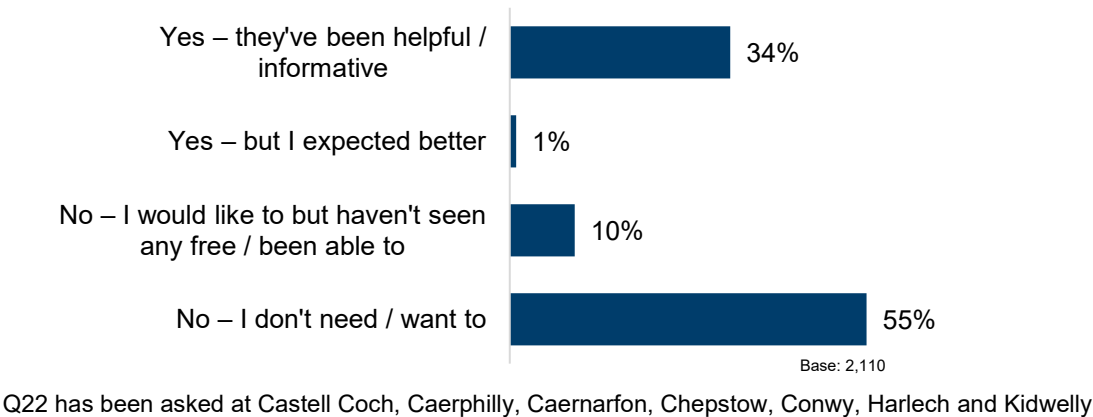
6.17 At all four sites, the proportion of visitors answering positively comfortably outweighs the proportion answering negatively on the following aspects:

- Informative vs lacking detail
- Right length vs too short or too long
- Entertaining vs boring

6.18 Answers do not vary significantly by party type.

Speaking to volunteers or staff members

Figure 20: Q22 “Have you spoken to a volunteer or staff member today to learn more about the Castle or make the most of your visit?”



Very positive feedback

6.19 Not everyone has felt the need to speak to someone about the site, but those who have mostly give positive feedback.

“It’s nice to have the option to ask staff if they are there but also use my own imagination”
Family with young children, London, Caerphilly

6.20 Castell Coch stands out among the sites as making a very positive difference here: 71% of visitors have spoken to someone and have found them to be helpful / informative.

“Andrea was brilliant with an impromptu talk!”
Couple, SE Wales, Castell Coch

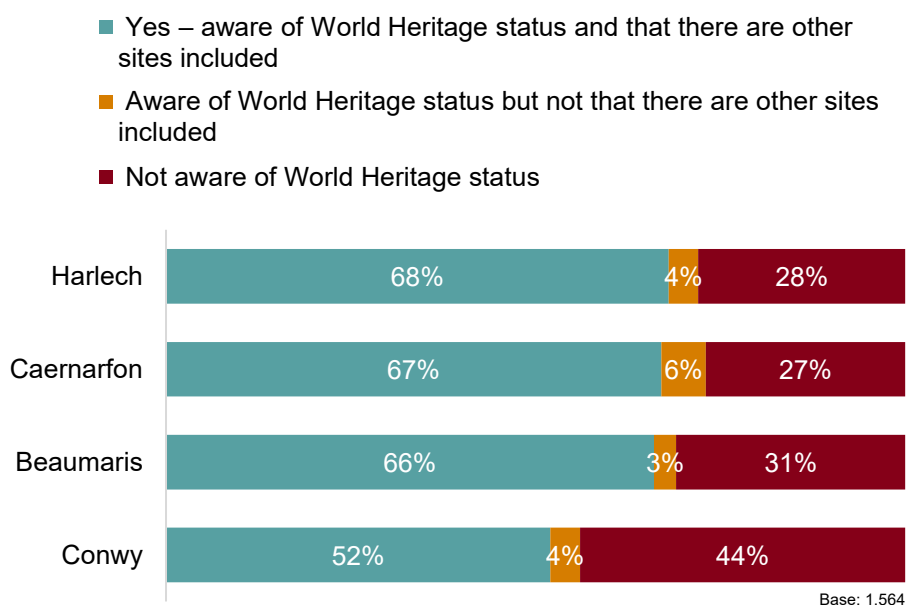
“The volunteer was lovely and helpful”
Family with older children, SE Wales, Castell Coch

6.21 At Conwy, many (65%) have not felt the need to speak to someone, but 15% have answered ‘I would like to but haven’t seen any free / been able to’.

7. World Heritage Sites

Awareness of UNESCO status

Figure 21: Q27 “Are you aware that this site is part of a serial UNESCO World Heritage Site?”



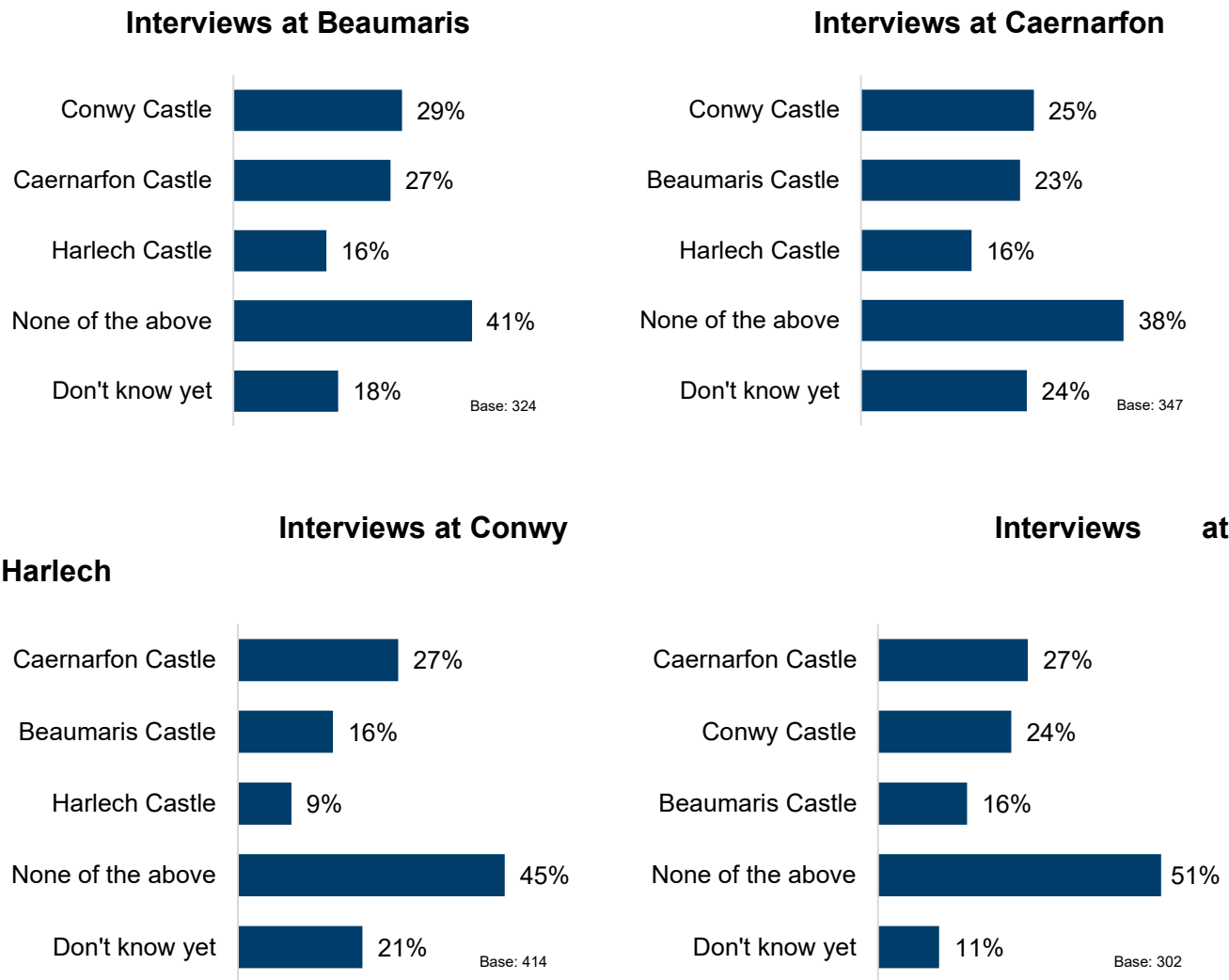
Q27 has been asked at Beaumaris, Caernarfon, Conwy and Harlech

Awareness could improve

- 7.1 The majority (66%) of visitors to the four King Edward I castles were aware at the time of interviewing that the castle forms part of a World Heritage Site, and they usually knew that there are other sites included.
- 7.2 However, awareness could improve, especially at Conwy, with 44% being unaware of the status.
- 7.3 Repeat visitors (73% fully aware) and lapsed visitors (66%) are more likely to be fully aware than new visitors (60%).
- 7.4 Over 35s (67% fully aware) are more likely to be fully aware than under 35s (56%).

Plans to visit the other castles

Figure 22: Q28 “Beaumaris Castle, Harlech Castle, Conwy Castle and Caernarfon Castle are four King Edward I castles which form part of a serial World Heritage Site. Do you have any plans to visit any of the other three castles whilst staying in this region of Wales?”



Q28 has been asked at Beaumaris, Caernarfon, Conwy and Harlech to visitors staying away from home. The answer options shown to respondents have excluded the site of interview, e.g. visitors to Beaumaris have been asked about plans to visit Conwy, Caernarfon and Harlech.

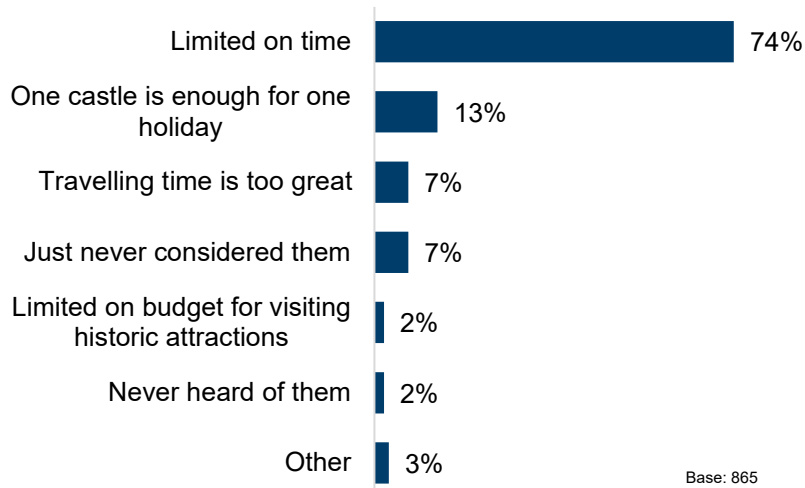
Intentions split roughly 50/50 between one castle and more than one

7.5 Depending on how those answering ‘don’t know yet’ ended up behaving, approximately half of respondents to the Edward I castles in NW Wales have visited more than one of the ‘series’ during their trip.

7.6 If one or more other castles are visited, the most frequently answered site is always either Conwy or Caernarfon. Where Harlech is one of the three other possible sites, it is always the least frequently answered.

Reasons for ‘one castle only’ trips

Figure 23: Q29 “Are there any particular reasons why those other castles don’t feature in your plans?”



Q29 has been asked to those answering ‘none’ or ‘don’t know’ to Q28

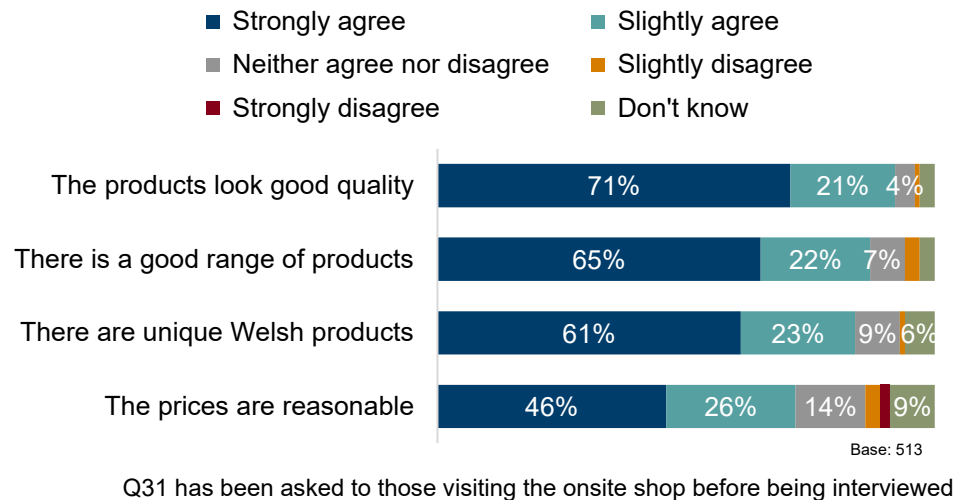
Time is the limiting factor

7.7 For those not intending to visit other castles in the World Heritage series during the trip, ‘limited time’ stands out as by far the most significant reason in every respondent group. Other reasons such as limited budget or awareness do not come close. Therefore to increase visitor numbers from holidaymakers to these four castles in NW Wales, Cadw is competing for attention against other holiday activities in the region.

8. Onsite shops

Views on onsite shop experience

Figure 24: Q31 “How much do you agree or disagree with each of the following statements about the items in the onsite shop?”



Positive feedback on all aspects

8.1 Feedback on Cadw’s onsite shops in terms of product quality, range, prices and unique Welshness are positive across all sites and respondent groups.

9. Implications for Cadw

Investment pays off at Caerphilly

- 9.1 The substantial investment at Caerphilly has resulted in high levels of visitor satisfaction, experiences exceeding expectations and significantly longer dwell times. Separate observational research will be reported to Cadw, detailing which new features work best and why, and what could be applied at other sites.

Overcoming misconceptions of ruins

- 9.2 Whilst some progress seems to have been made in raising pre-visit expectations through better use of images on the Cadw website, there is still some way to go in overcoming misconceptions. Many visitors to heritage sites in the UK seem to base their expectations of Cadw sites on what they see in England and Scotland.

Striking the balance between novel interpretation and losing authenticity

- 9.3 Some visitors, especially families with children, are keen on just about all new interpretation ideas suggested. At the other extreme, some visitors, especially those particularly keen on history and without children, do not want to see heritage sites turned into 'theme parks'.
- 9.4 Similarly, some visitors want to see reconstructed rooms, whereas others want spaces left alone. Striking the balance is hard but important for Cadw to get right.

Pre-visit info is hitting the mark, but not everyone seeks it

- 9.5 Sometimes Cadw research reveals causes of visitor dissatisfaction such as stress over parking, not finding an onsite café or being taken by surprise by scaffolding. It seems that visitors who seek information before they travel come across the Cadw website easily and find the information they're looking for easily too. The challenge is more that many visitors just turn up, and this can leave them open to experiencing causes of dissatisfaction.

Progress on attracting hard to reach audiences

- 9.6 Cadw has grappled for a long time with trying to widen its audience: lower socio-economic groups, ethnic minorities and those with accessibility needs. This year's survey has seen some positive progress in those areas.