



STRATEGIC MARKETING

REPORT

Shoulder Season Visitor Survey

Cadw

May 2015

Strategic Marketing
4 Park Court Mews
Park Place
Cardiff
CF10 3DQ

Tel: ++44 (0)29 2030 3100

www.strategic-marketing.co.uk

Contents	Page
1. Executive Summary	3
2. Background and Methodology	5
3. Results	7
4. Conclusions and Implications for Cadw	30

1. Executive Summary

Shoulder season visitors are more likely to be Welsh residents compared to peak season visitors

- 1.1 UK and overseas visitor numbers to Wales are lower in the shoulder season than in the peak season, and this is reflected in Cadw's shoulder season visitor profile. More than two in five (43%) shoulder season visitors are Welsh residents, compared to just a quarter (24%) in the 2013 peak season.

Slightly younger age profile

- 1.2 There is a slightly younger age profile in the shoulder season, most notably in the 25 – 34 age group (21% of shoulder season visitors, compared to 14% in peak season).
- 1.3 Other visitor demographics remain relatively unchanged from the peak season.

A visit to a Cadw site often exceeds expectations

- 1.4 Two in three (66%) visitors say their experience at a Cadw attraction was better than what they expected. St. Davids Bishop's Palace leads the surprises, with more than half (58%) of its shoulder season visitors saying their visit was 'much better' than they expected.

Experiences at Cadw sites are getting better not worse

- 1.5 The majority (61%) of repeat visitors to Cadw sites say their experience was the same as the previous visit. Of those experiencing a change, better experiences (37% of respondents) vastly outweigh worse experiences (2%).
- 1.6 Sites with improved interpretation fare very well. Three of the top four sites giving 'better' experiences – Castell Coch (46%), Caerphilly Castle (44%) and Conwy (42%) – are those with improved interpretation.

Visitor satisfaction ratings are very high

- 1.7 Shoulder season visitors are very satisfied with their experience at Cadw sites. Overall visit satisfaction averages 9.0 out of 10.
- 1.8 Cadw staff in particular are rated very highly – 9.6 average for friendliness and 9.5 for knowledge of the site.
- 1.9 The only visit aspect that lags behind is 'suitability of the attraction for children 7 or under', which averages 8.1.

Shorter dwell times than in peak season

- 1.10 About half (49%) of shoulder season visitors have stayed at the attraction for longer than an hour – this compares to 73% of peak season visitors who stayed longer than an hour in the 2014 survey.
- 1.11 The average dwell time among shoulder season visitors is approximately 1.1 hours – compared to 1.5 hours in peak season.
- 1.12 The average dwell time at sites with improved interpretation is approximately 1.5 hours – significantly longer than at sites without improved interpretation (1.0 hours).

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

- 1.13 Three in five (60%) shoulder season visitors say the format of information at the attraction is 'novel and appealing'. This is significantly higher than in the 2014 peak season survey (42%).
- 1.14 However, sites with improved interpretation (Conwy, Caerphilly and Castell Coch) do not fare better than sites without it. This is very different from the 2014 finding, when sites with improved interpretation fared much better.
- 1.15 Caerleon fares particularly well, with nearly all (95%) of its visitors saying the information is novel and appealing. St Davids Bishop's Palace also fares very well.

2. Background and Methodology

Why was this research conducted?

- 2.1 In 2008, Cadw commissioned a visitor survey at selected staffed sites to find out the profile of visitors and their experience. The 2008 visitor survey served as a benchmark for future projects. This survey was repeated in 2011 and 2013.
- 2.2 In 2014, Cadw commissioned 'Visitor Satisfaction and Dwell Time' research, and found that 61% of respondents reported they found the format of information novel and appealing at sites with *improved interpretation*, compared to 36% at sites that had not yet been improved.
- 2.3 Now Cadw have commissioned a project to gather evidence on the demographics of visitors to its sites over the winter/spring shoulder season in 2015, ahead of the summer season.
- 2.4 The main purpose of the research was to collect information on visitor profile, including age, occupation, ethnicity and SEG.
- 2.5 The survey also looked into visitor satisfaction, home postcodes to track where visitors come from, duration of stay and thoughts on new and existing interpretation.
- 2.6 This research has built upon both the 2014 survey conducted last year, and the Visitor Surveys completed in 2011 and 2013.

How was this research conducted?

- 2.7 Strategic Marketing worked with Cadw to design a questionnaire suitable for face-to-face interviewing with visitors at Cadw sites.
- 2.8 Strategic Marketing interviewers conducted most of the interviews, and custodians at four of the sites also conducted 31 'top-up' interviews.
- 2.9 Interviews were conducted between 14 February and 29 March 2015. The table below shows the breakdown of interviews by site:

Site	No. of interviews
Conwy Castle	133
Caernafon Castle	32
Caerphilly Castle	140
Castell Coch	122
Caerleon Roman Fortress and Baths	124
Beaumaris Castle	146
Raglan Castle	133
Tintern Abbey	132
Chepstow Castle	125
Harlech Castle	157
Kidwelly Castle	118
St. Davids Bishop's Palace	105
Criccieth Castle	54
Blaenavon Ironworks	13
Denbigh Castle	36
Tretower Court & Castle	34
Total	1,604

Analysis structure

- 2.10 Wherever feasible, the chart for each question shows the breakdown in answers by site. Some of the quieter sites proved to be difficult interviewing locations as footfall at the time of year was very low. These sites are not singled out in the analysis in this report due to low sample sizes, but their interviews do count towards the overall totals.
- 2.11 For more complex questions we simply show overall results for all sites combined, as the chart would be too busy and incomprehensible if broken down by site. We have highlighted any significant differences by site in the text, and we have also produced an accompanying set of cross-tabulations where all results to questions with quantifiable answers can be viewed by site.
- 2.12 Open-ended comments given by respondents add to our interpretation of the results and we use a balanced selection of comments throughout in order to illustrate key points.

3. Results

Visitor Profile

Description	2015 (shoulder season)	2013 (peak season)
Gender		
Male	49%	46%
Female	51%	54%
Age		
16 – 19	2%	1%
20 – 24	5%	3%
25 – 34	21%	14%
35 – 44	26%	26%
45 – 54	20%	21%
55 – 59	8%	8%
60 – 64	7%	9%
65+	11%	18%
SEG		
AB	36%	40%
C1	42%	35%
C2	14%	17%
DE	8%	8%
Where resident		
Wales	43%	24%
UK outside Wales	48%	60%
Overseas	9%	16%
Ethnicity		
White	96%	98%
Other	4%	2%

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

High proportion of Welsh residents in the shoulder season

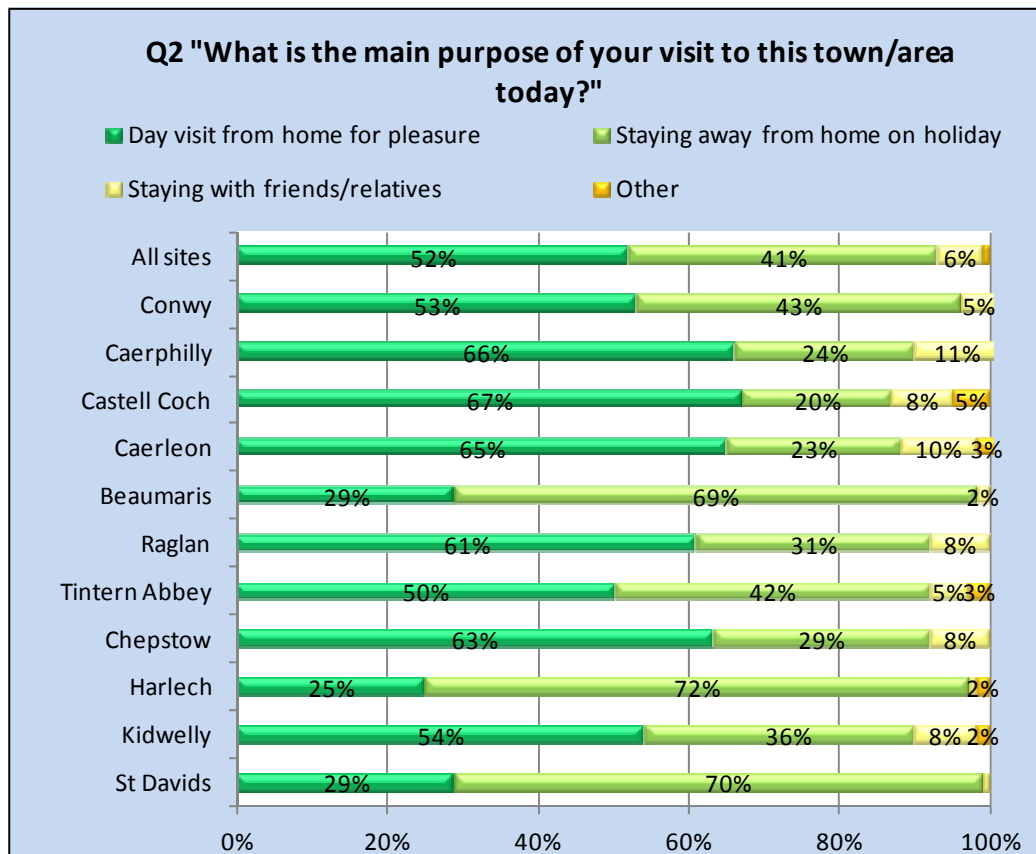
3.1 UK and overseas visitor numbers to Wales are lower in the shoulder season than the peak season, and this is reflected in Cadw's shoulder season visitor profile. More than two in five (43%) shoulder season visitors are Welsh residents, compared to just a quarter (24%) in the 2013 peak season.

Slightly younger age profile

3.2 There is a slightly younger age profile in the shoulder season, most notably in the 25 – 34 age group (21% of shoulder season visitors, compared to 14% in peak season). The Off-peak Visitor Survey commissioned by Visit Wales in 2013/14 showed that families with young children have a necessity to get out of the house all year round regardless of the colder weather, and so this may explain the difference.

3.3 Other visitor demographics remain relatively unchanged from the peak season.

Main purpose of visit to the area

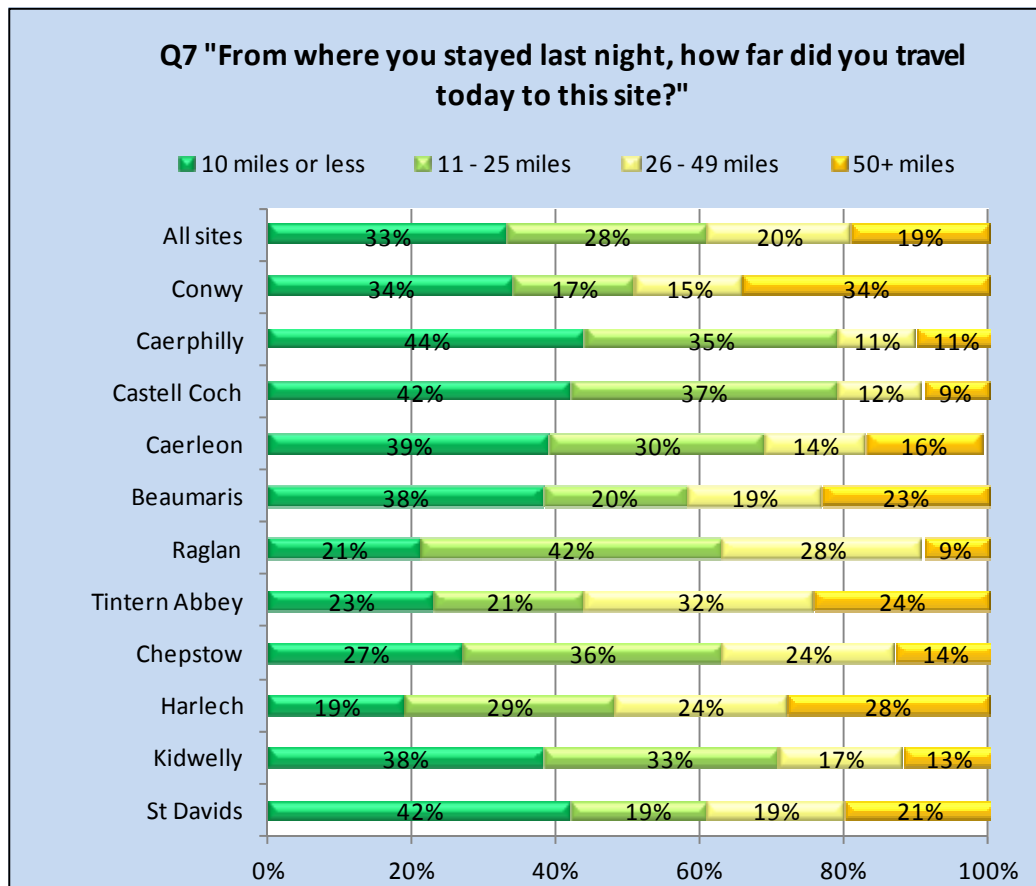


Base: 1,604

Castles in popular holiday areas have a different visitor profile

- 3.4 In terms of main purpose of visiting the town or area where the site is located, castles in popular holiday areas attract a different make-up of visitors.
- 3.5 Beaumaris Castle (in Anglesey), Harlech Castle (in Snowdonia) and St. Davids Bishop's Palace (in Pembrokeshire) have all attracted the majority of their shoulder season visitors from among holidaymakers in the area. In comparison, the majority of visitors to other sites are day visitors coming from home.

Distance travelled to the site



Base: 1,563

Conwy Castle attracts many long-distance travellers

- 3.6 A third (34%) of visitors to Conwy Castle have travelled more than 50 miles to get there. Harlech Castle is not near any large population centres and sees about half (52%) of its shoulder season visitors travelling further than 25 miles.

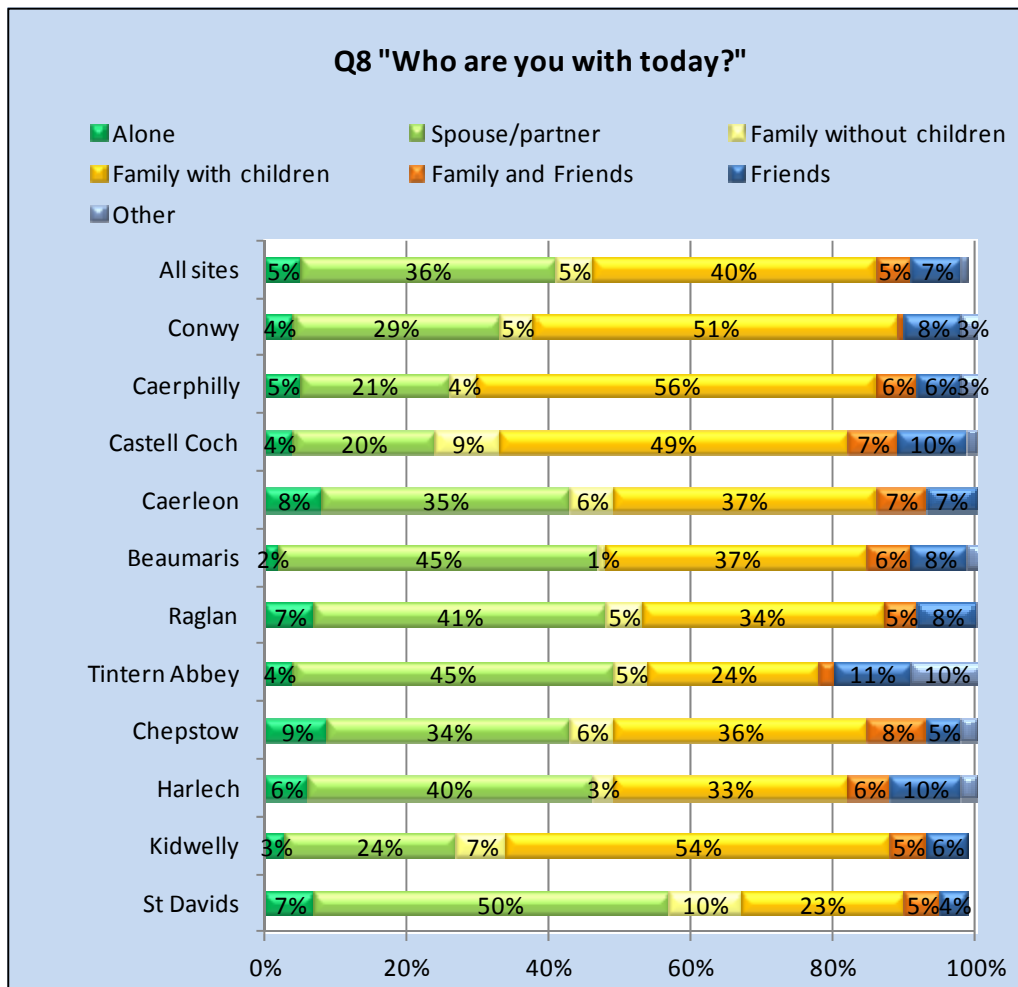
Sites close to large cities see their visitors travelling shorter distances

- 3.7 At the other extreme, Caerphilly Castle and Castell Coch, situated close to largely populated Cardiff, see more than two in five shoulder season visitors travelling 10 miles or less to reach them.
- 3.8 St. Davids Bishop's Palace is not close to any major cities but sees a large proportion (42%) of its visitors travelling 10 miles or less. This is explained by the large proportion of holidaymakers staying in the area in its visitor profile.

Very little difference with the peak season

- 3.9 There is very little difference in the distances travelled to reach Cadw sites between shoulder season 2015 and peak season 2013.

Type of party



Base: 1,604

Broad spread of party types

- 3.10 Cadw sites have a broad appeal and this is reflected in the spread of visiting party types.
- 3.11 Families with younger children (31%¹ of parties) outweigh families with older children (15%² of parties) significantly. This might imply that Cadw sites' appeal is perceived to be more for younger than older children, but later results in Q19 say otherwise. The difference in profile might be a reflection of how many teenagers really want to go on days out with their parents.

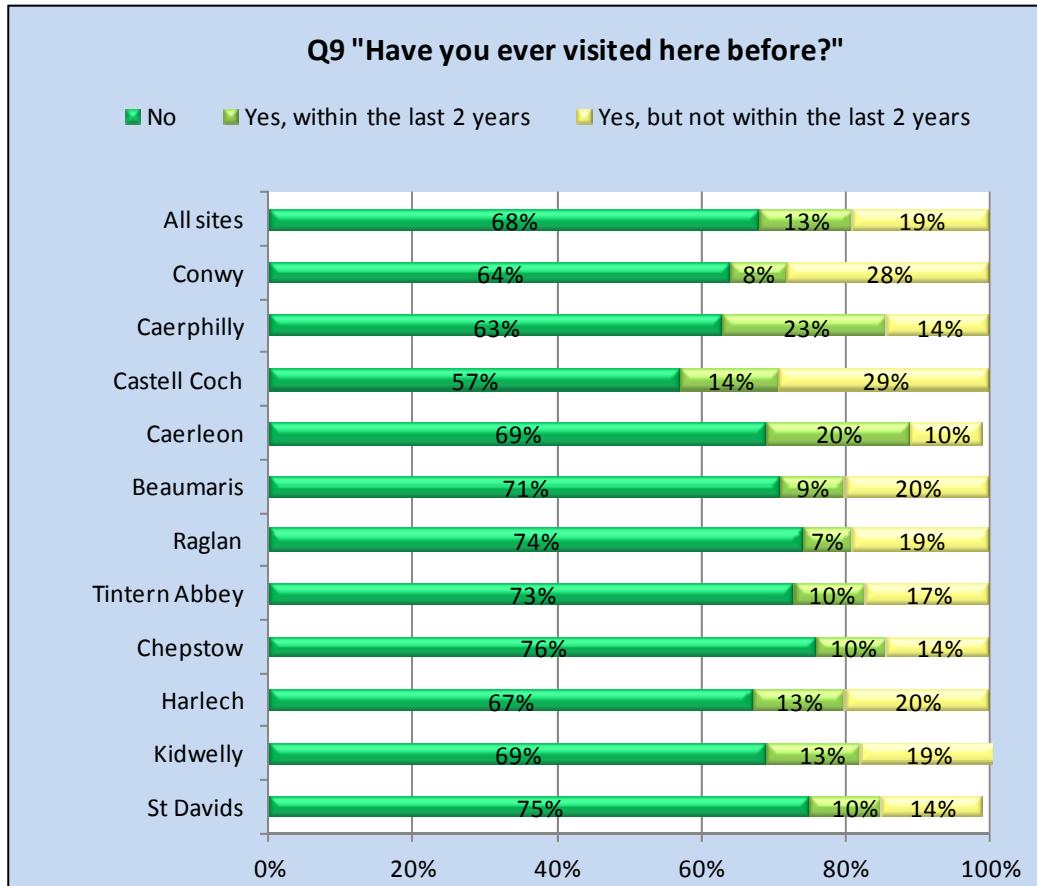
Conwy and Caerphilly have attracted the highest proportions of families with young children

- 3.12 Close to half (45%) of parties visiting Conwy Castle and a similar proportion (43%) of parties visiting Caerphilly Castle are families with young children.
- 3.13 St. Davids Bishop's Palace has attracted the highest proportion of couples (50% of parties). As most (70%) of its shoulder season visitors are holidaymakers, this may be a reflection of the type of party typically holidaying in Pembrokeshire at that time of year.

¹ This figure comes from adding together families with younger children (25%) and families with younger and older children (6%)

² This figure comes from adding together families with older children (9%) and families with younger and older children (6%)

New, lapsed and repeat visitors

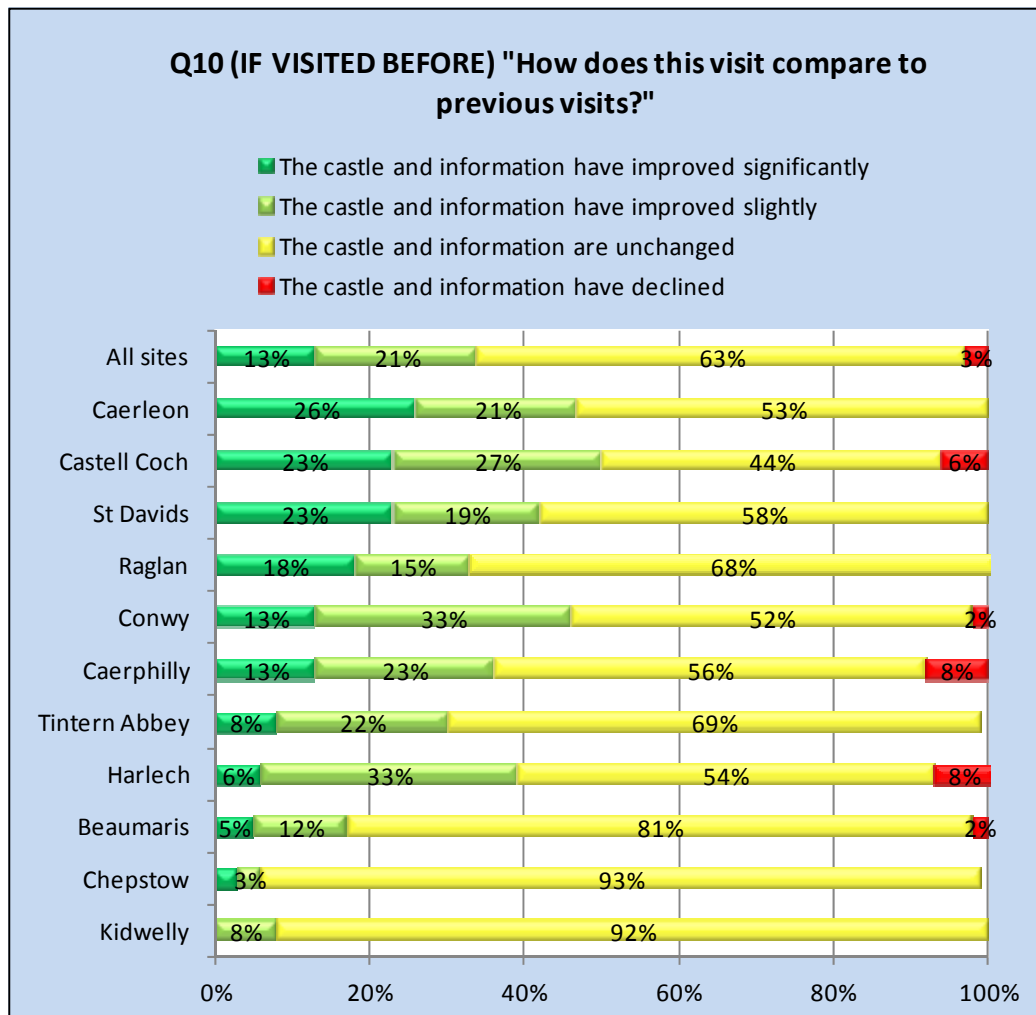


Base: 1,604

High proportion of new visitors to all sites

- 3.14 With so many attractions across the country competing for attention, new visitors can be quite hard to come by. About two thirds (68%) of visitors to Cadw sites in this recent shoulder season have visited the site for the first time.

Perceived change in the attraction and the information provision



Base: 510

- 3.15 Three sites – Conwy Castle, Caerphilly Castle and Castell Coch – have benefitted from significantly improved interpretation within the past two years.
- 3.16 Some visitors to these sites have noticed this improvement through their answer to Q10, but the results are not as strong as in the *Dwell Time and Satisfaction Research* conducted late summer in 2014.

“Children’s interactive map”

Family with younger children, Conwy Castle

“More interactive display”

Couple, Caerphilly Castle

“More re-creations and pictures”

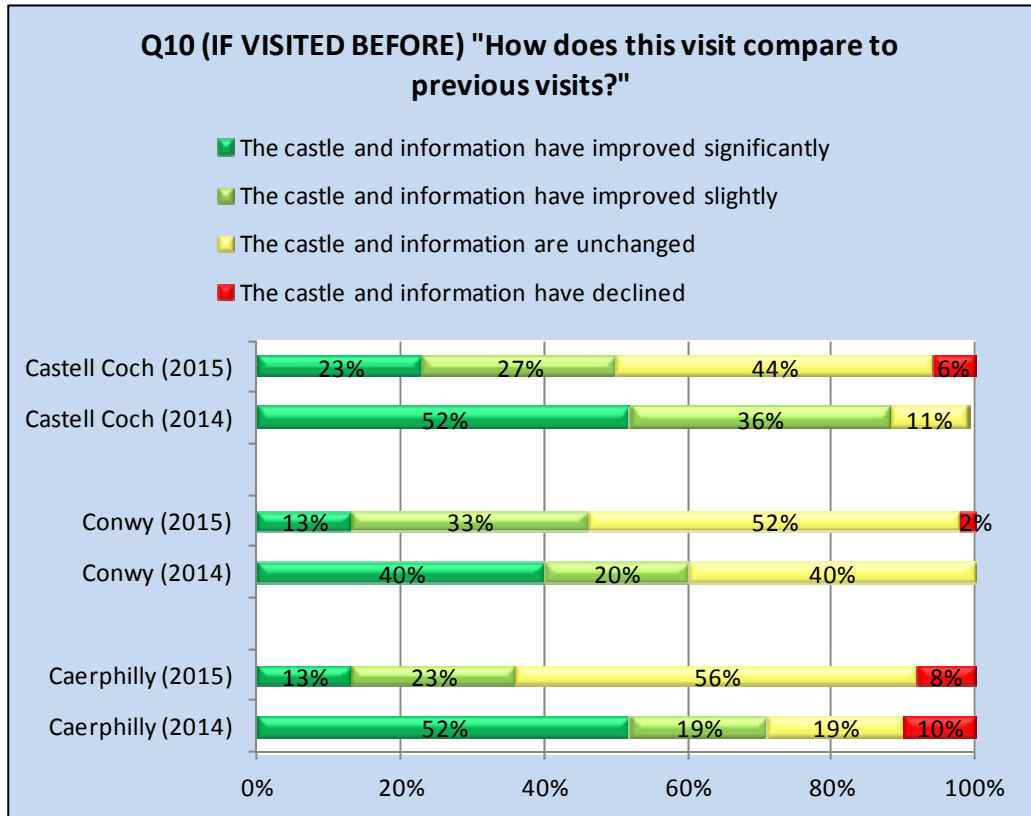
Couple, Conwy Castle

“Ear plugs for commentary”

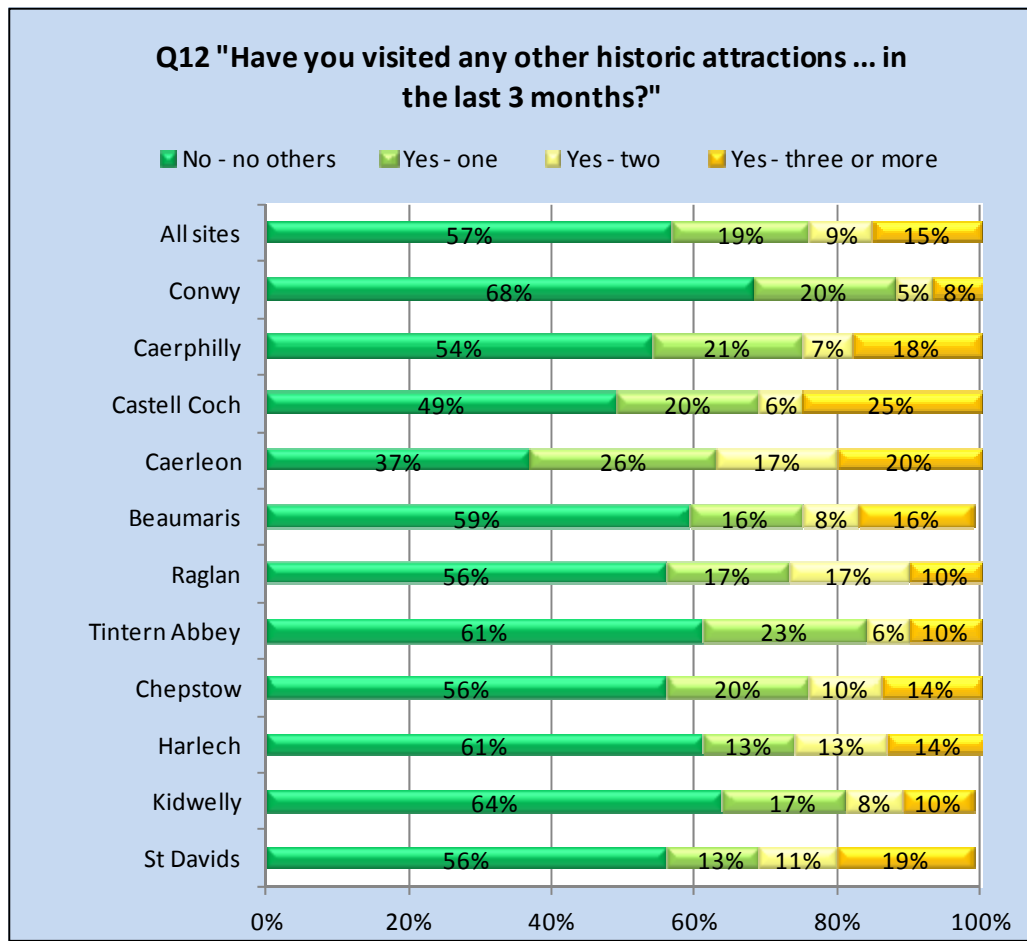
Family with older children, Castell Coch

3.17 The timing of the previous visit (within the past two years or more than two years ago) has some impact – but not a significant impact – on the results to Q10 for these sites.

3.18 The chart below shows the comparison in results between 2015 and 2014 for these sites with new interpretation:



Visiting other historic attractions

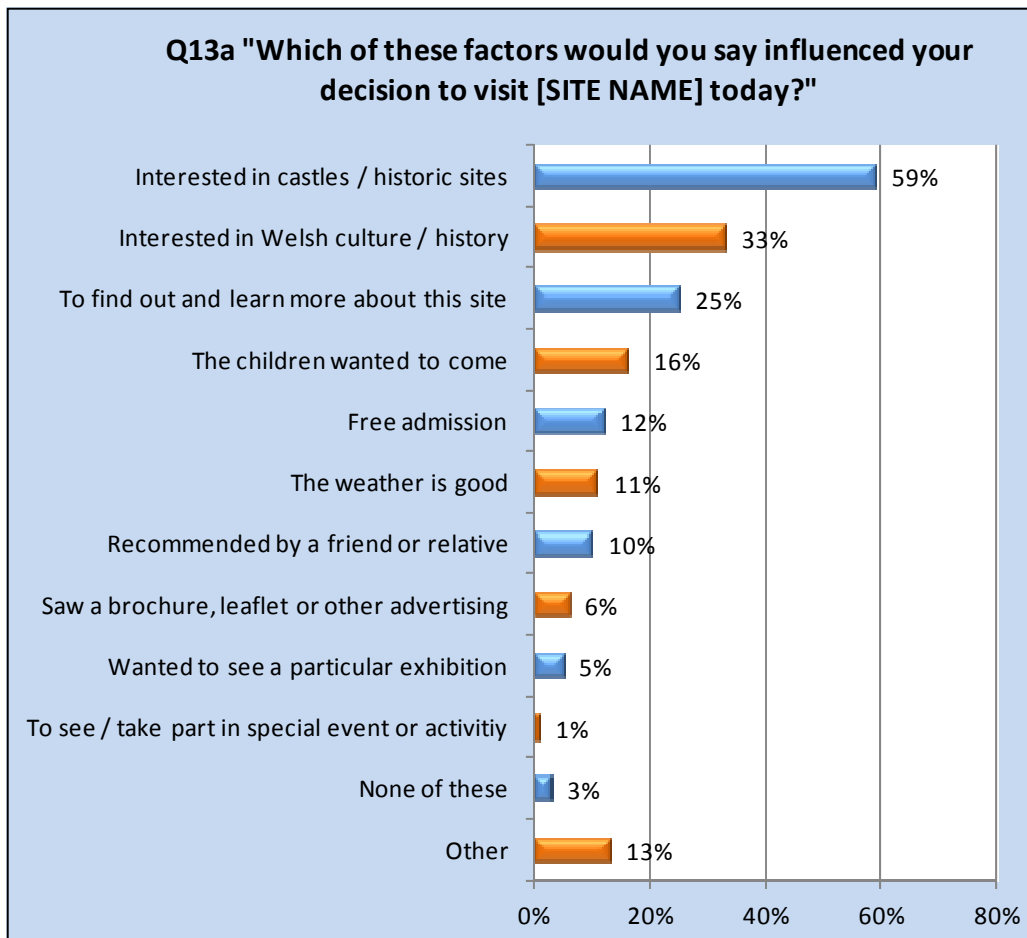


N.B. The sites listed on the above chart relate to where interviews were conducted, not what historic attractions respondents may have visited in the last three months

Majority of respondents visiting a historic attraction for the first time in over three months

3.19 Visitor numbers to historic attractions in general are lower in the winter months, and the shoulder season of 2015 has seen many visitors effectively coming out of 'hibernation' to visit a historic attraction for the first time since before the onset of winter.

Influences on the decision to visit



Base: 1,604

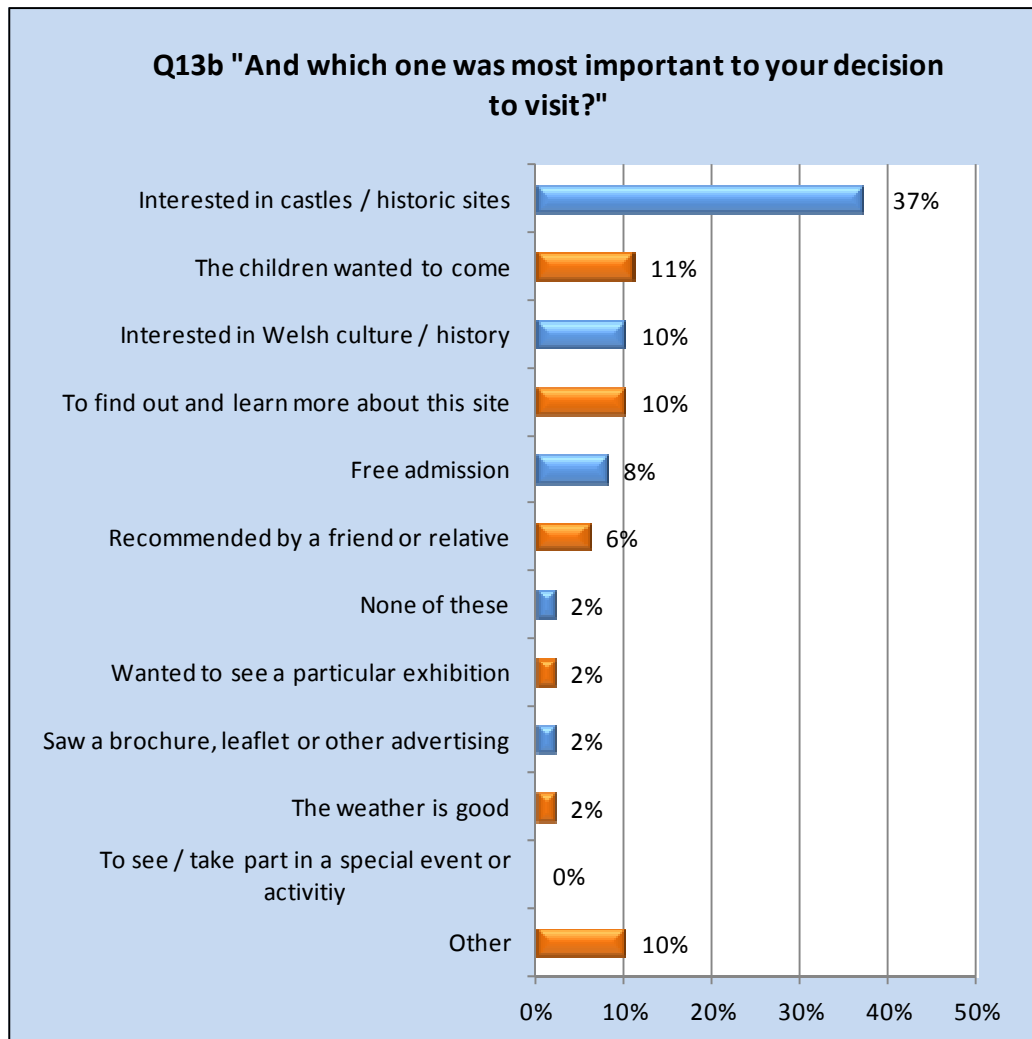
Similar results to peak season

3.20 The factors of influence to visit a Cadw site are in a very similar order to the peak season survey in 2013. General interest in castles / historic sites (59% of respondents) remains clearly the most frequently mentioned factor of influence.

Interest in Welsh culture / history is generally higher in North Wales sites

3.21 Harlech Castle has attracted the highest proportion of visitors motivated by Welsh culture / history (49% of respondents), followed by Conwy (44%).

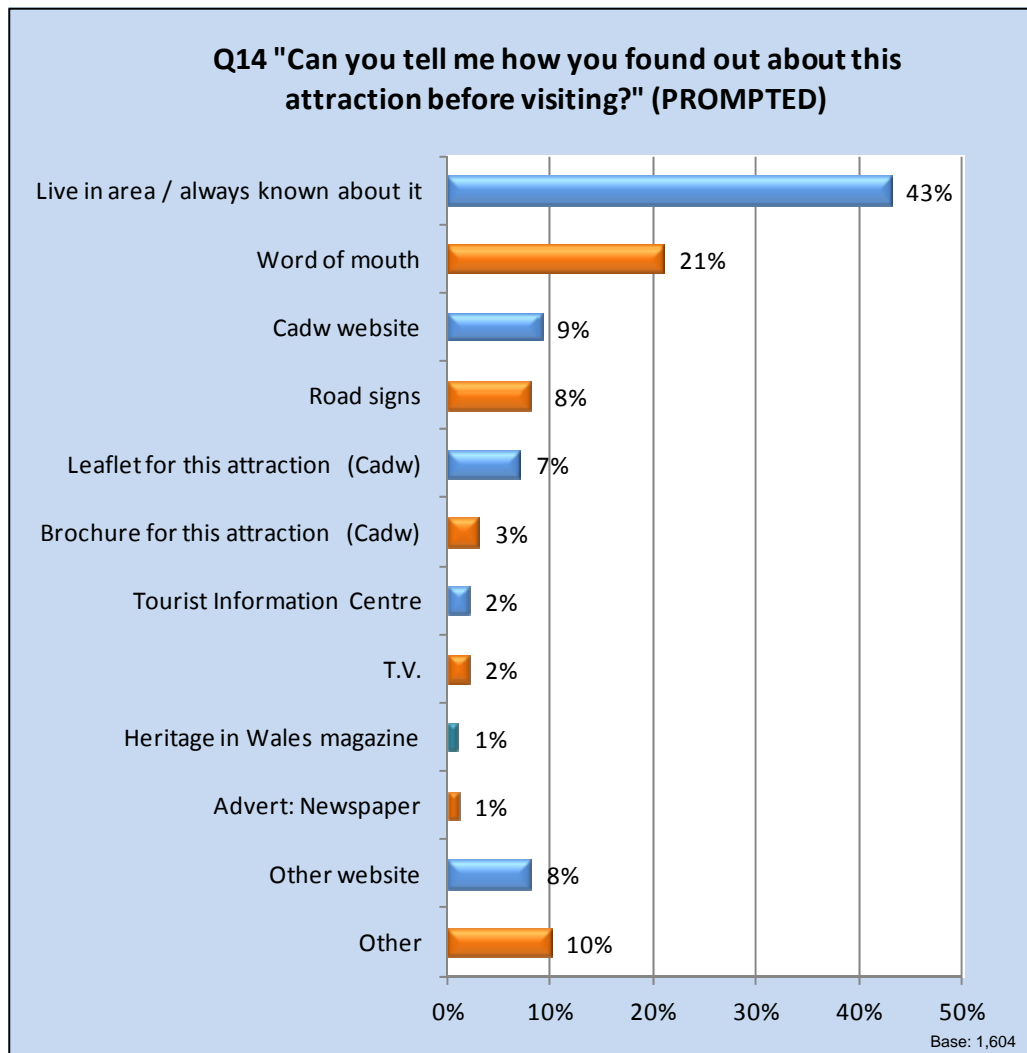
3.22 At some South Wales sites, interest in Welsh culture / history appears less strong, especially at Castell Coch (17% of respondents), Caerphilly (17%) and Kidwelly (18%).



Some variation in results by site

- 3.23 When narrowed down to the single most important influencing factor on the decision to visit, 'interest in castles / historic sites' remains the clear single most important factor (37% of respondents).
- 3.24 This factor is less influential at Caerphilly Castle (19% of respondents) and Castell Coch (11%) however. At these two sites, the influence of children is about as strong (18% of respondents at Caerphilly and 15% at Castell Coch).

Source of awareness



Awareness stems from a variety of sources

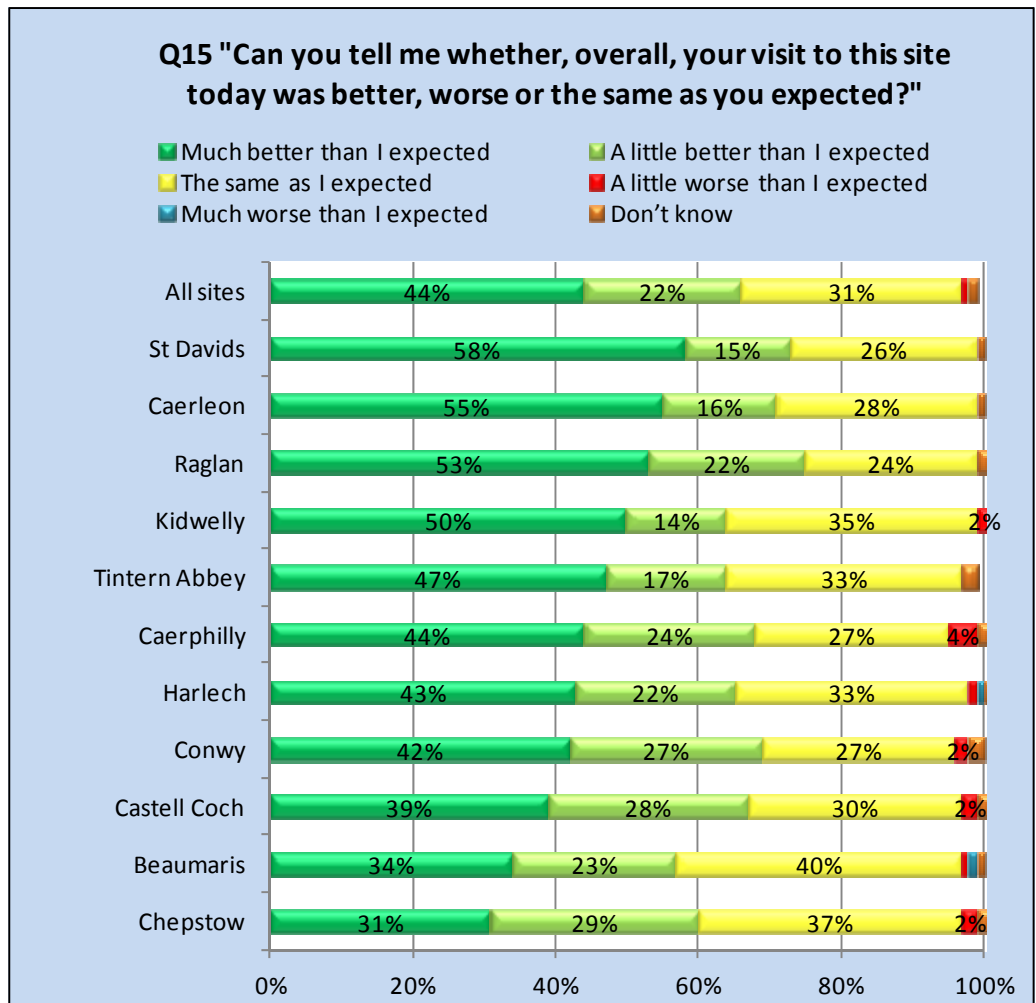
- 3.25 The top two sources of awareness of the site visited – ‘live in area / always known about it’ (43%) and ‘word of mouth’ (21%) – are quite general and it is hard sometimes for respondents in a survey to pinpoint exactly how and where they first became aware of an attraction.
- 3.26 Among the more specific sources of awareness given, online and offline sources have both played a role in raising awareness. The sites where the Cadw website has raised awareness the most are:
- Caerphilly Castle (19% of respondents)
 - Kidwelly (15%)
 - Raglan (14%)

- Castell Coch (11%).

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

- Raglan Castle (19%)
- Castell Coch (11%)
- Harlech (10%)
- Beaumaris (10%)

Experience compared to expectations

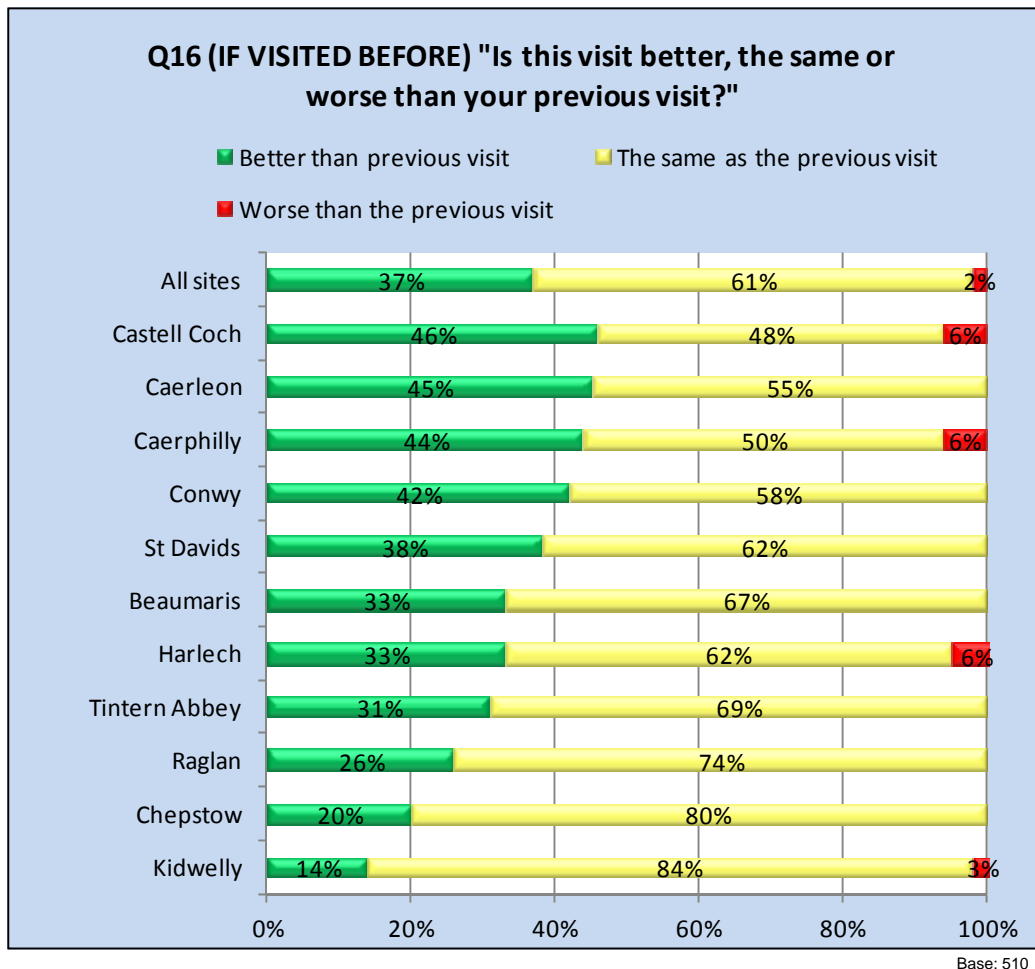


A visit to a Cadw site often exceeds expectations

3.28 It is unclear what visitors to Cadw sites expect before they visit, but what is clear is that the experience for so many (66%) is better than what they

expected. St. Davids Bishop's Palace leads the surprises, with more than half (58%) of its shoulder season visitors saying their visit was 'much better' than they expected.

Experience compared to previous visit



Experiences at Cadw sites are getting better not worse

3.29 The majority (61%) of repeat visitors to Cadw sites say their experience was the same as the previous visit. Of those experiencing a change, better experiences (37% of respondents) vastly outweigh worse experiences (2%).

Sites with improved interpretation fare very well

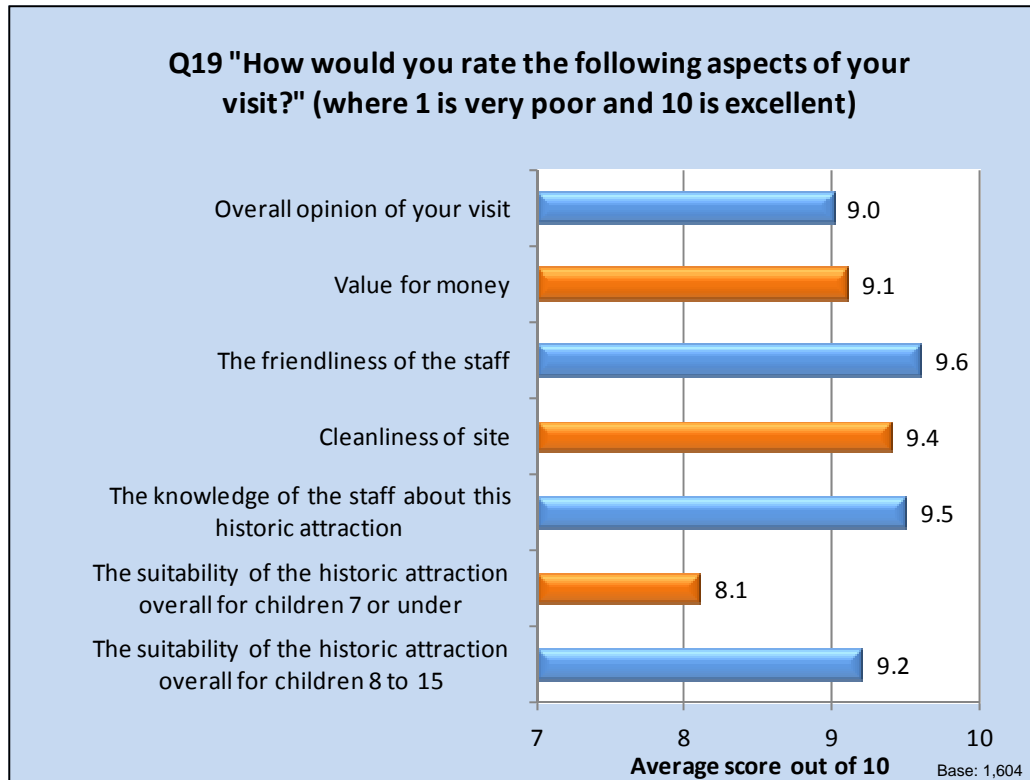
3.30 Three of the top four sites giving 'better' experiences – Castell Coch (46%), Caerphilly Castle (44%) and Conwy (42%) – are those with improved interpretation.

"More interactive, liked the owls"
Family with younger children, Conwy Castle

"The kids like it – it's an educational visit"
Family with younger and older children, Castell Coch

"Seeing it through children's eyes"
Group of family and friends, Caerphilly Castle

Rating different aspects of the experience



Staff are a key asset

- 3.31 The staff at Cadw sites are rated very highly both in terms of friendliness (9.6 out of 10 average rating) and knowledge (9.5).

"Ian is so interesting, he knows all the history"
Couple, Tretower

- 3.32 The staff at Caerleon stand out particularly well, scoring the perfect 10.0 average for friendliness, an extremely high 9.8 for knowledge, while also maintaining impeccable site cleanliness (10.0).

Value for money

- 3.33 Value for money at Cadw attractions averages a high 9.1 out of 10. Ratings across the sites are fairly consistent, but a couple of points to note:
- Caerleon averages an extremely high 9.9
 - Tintern Abbey averages the lowest at 8.7; one in six (17%) respondents rate its value for money at only 7 or below

Suitability for children

- 3.34 The suitability of Cadw attractions for children varies by the age of children in question, and also by site.

- 3.35 Suitability for older children (aged 8 to 15) averages 9.2 out of 10. The rating is particularly high at Caerleon (9.8) and less positive at all of the North Wales sites featured – Conwy (8.7), Beaumaris (8.7) and Harlech (8.9).

“We enjoyed all of it – the children liked taking part”
Family with younger and older children, Caerleon

“Most enjoyable part was watching the children’s faces”
Family with older children, Criccieth

- 3.36 Suitability for younger children (aged 7 or under) rates less well (8.1 on average). Here the highest ratings are all in South East Wales sites – Caerleon (8.9), Chepstow (8.7) and Raglan (8.5), and lowest in the North Wales sites – Conwy (7.0), Beaumaris (7.6) and Harlech (7.6).

“Stairs not suitable with small child”
Family with younger children, Conwy Castle

“No baby changing facilities in the coffee shop so will not be back”
Family with younger children, Raglan Castle

“High bits, no railings for children”
Family with younger children, Raglan Castle

“Best part was seeing children enjoying it”
Family with younger children, Caerphilly Castle

“Good for young kids and us. Educational as well as fun.”
Family with younger children, Caerphilly Castle

Good satisfaction levels overall

- 3.37 Overall visit ratings are high across Cadw attractions, averaging 9.0. Ratings range from 9.4 at Caerleon to 8.7 at Beaumaris and Chepstow.

“Interpretation, ambience, audio points – very enjoyable”
Group of family and friends, Caerleon

Virtual pool has gone down very well at Caerleon

- 3.38 Experiences at Caerleon Roman Fortress and Baths are higher than at any other attraction, and the virtual pool appears to have been particularly well received.

"The virtual pool and swimmers were the most enjoyable part"
Couple, Caerleon

"The virtual pool"
Family with younger children, Caerleon

Owls popular at Conwy Castle

- 3.39 Visitors to Conwy Castle have enjoyed the owls on display.

"The owls were the most enjoyable part"
Family with younger and older children, Conwy Castle

Scale of Tintern Abbey

- 3.40 The scale of Tintern Abbey has impressed its visitors, along with the peace and freedom around the attraction.

"Seeing the scale of building"
Family with younger children, Tintern Abbey

"The freedom to walk around with the dog"
Family with younger and older children, Tintern Abbey

Beaumaris Castle in need of more or better information

- 3.41 Comments relating to Beaumaris Castle imply that more or better information in places would improve the visitor experience. Having to walk across muddy ground also seems to have affected the experience in the shoulder season.

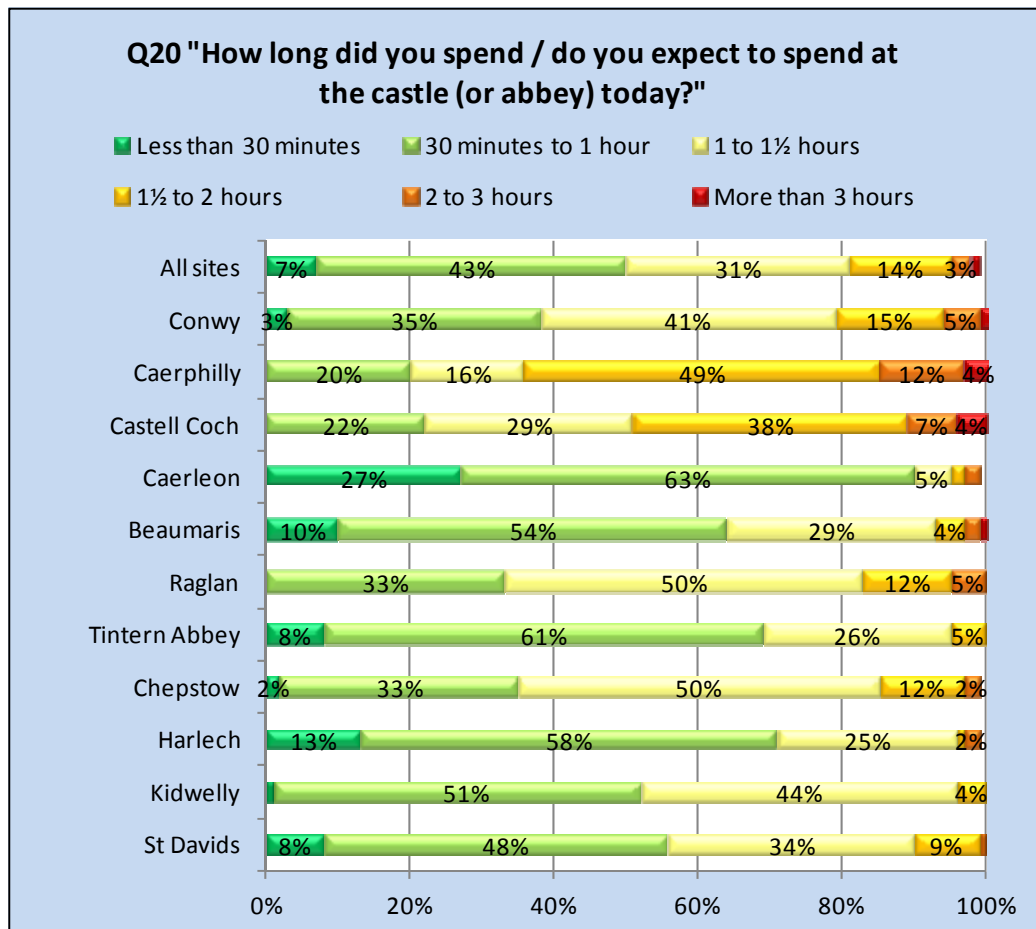
"Needs more signage, headphones ... needs more imagination"
Couple, Beaumaris Castle

"Lack of a guide"
Group of family and friends, Beaumaris Castle

"More information would be useful ... video presentation was not good"
Couple, Beaumaris Castle

"Put walkways to avoid mud"
Couple, Beaumaris Castle

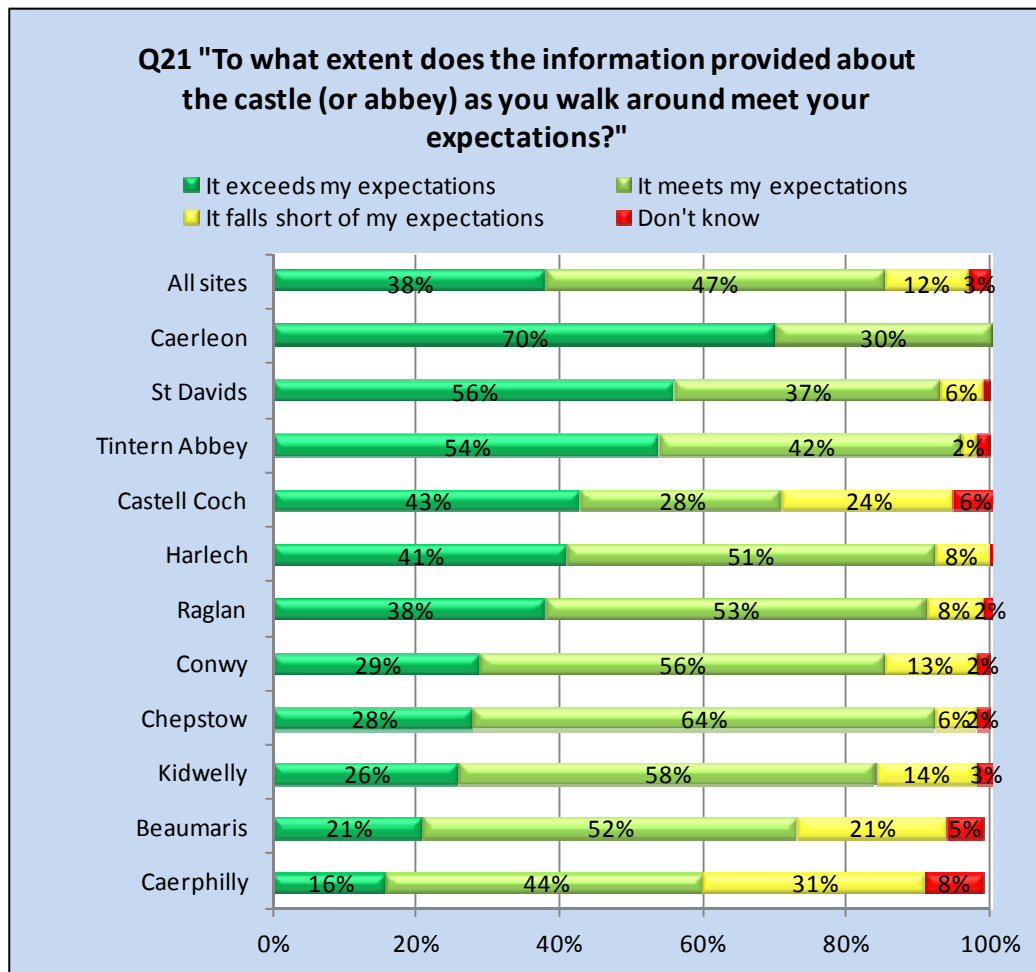
Length of time spent at the attraction



Shorter dwell times than in peak season

- 3.42 About half (49%) of shoulder season visitors have stayed at the attraction for longer than an hour – this compares to 73% of peak season visitors who stayed longer than an hour in the 2014 survey.
- 3.43 The average dwell time among shoulder season visitors is approximately 1.1 hours – compared to 1.5 hours in peak season.
- 3.44 Caerphilly Castle (1.6 hours average dwell time) and Castell Coch (1.5 hours) stand out as the two sites with the longer shoulder season dwell time. Both these sites have had improved interpretation. The average dwell time at sites with improved interpretation is approximately 1.5 hours – significantly longer than at sites without improved interpretation (1.0 hours).
- 3.45 Average dwell time at Caerleon is noticeably short (0.7 hours). Nine in ten (90%) of its shoulder season visitors stay an hour or less.

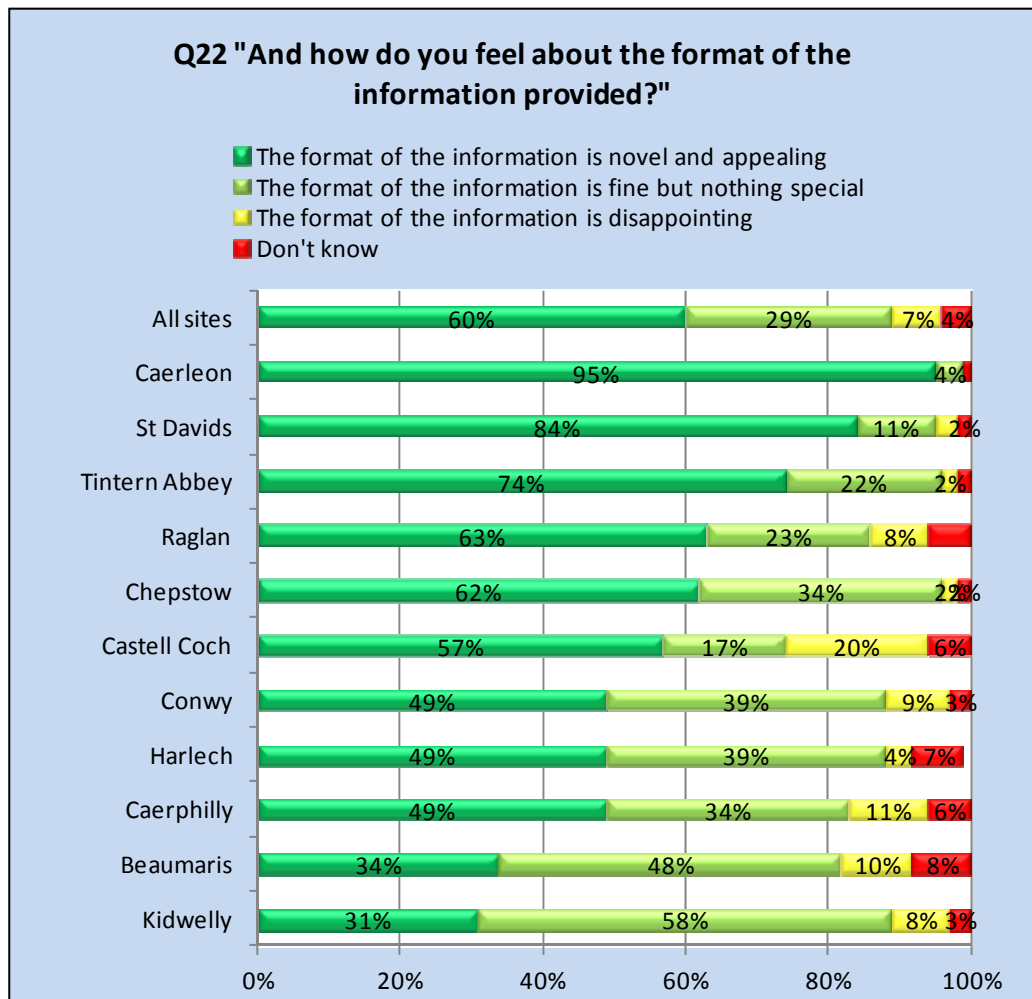
Information expectations – are they met?



Surprising results for sites with improved interpretation

- 3.46 The information provided at Cadw attractions generally meets or exceeds expectations (85% of respondents). However, sites with improved interpretation (Conwy, Caerphilly, Castell Coch) do not fare better than sites without. At Caerphilly Castle, the balance is even negative, with one in three (31%) respondents saying the information fell short of expectations compared to one in six (16%) saying is exceeded their expectations.
- 3.47 Caerleon fares very well again, with the majority (70%) of visitors saying the information there exceeded expectations.

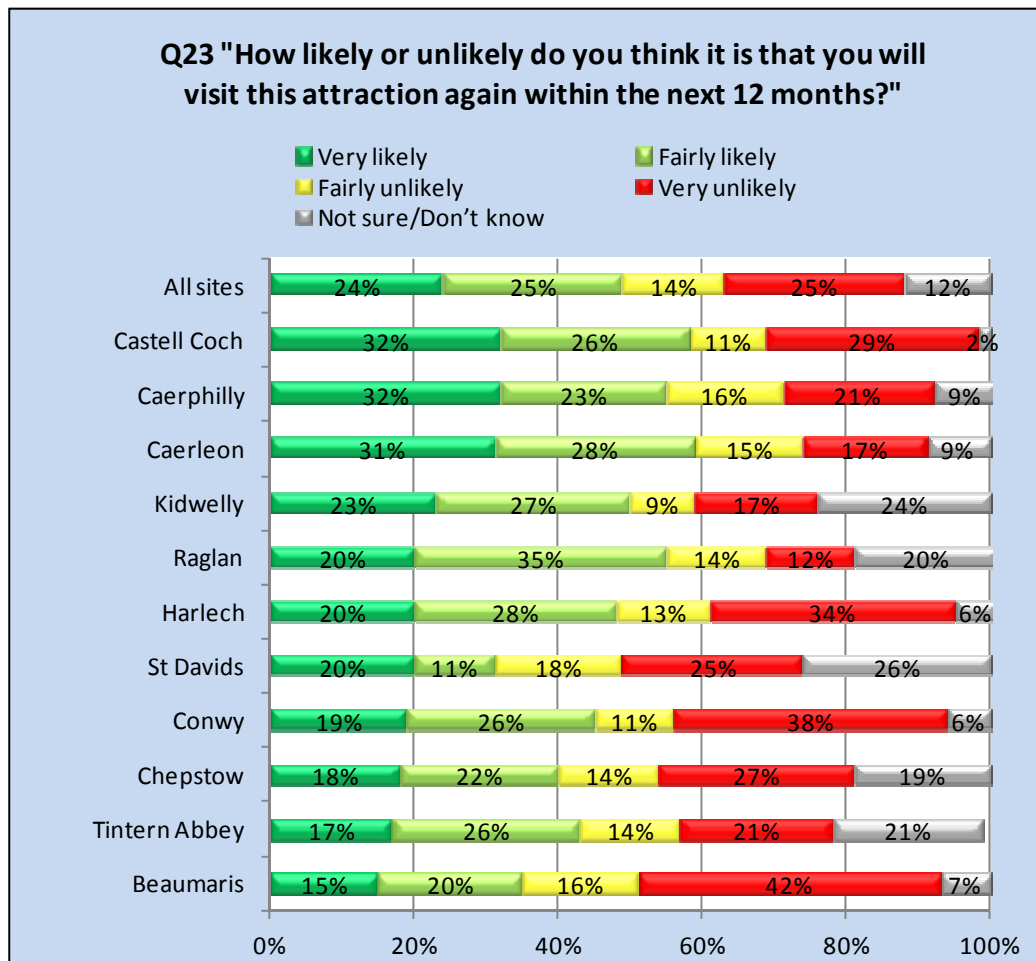
Information format



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

- 3.48 Three in five (60%) shoulder season visitors say the format of information at the attraction is 'novel and appealing'. This is significantly higher than in the 2014 peak season survey (42%).
- 3.49 However, sites with improved interpretation (Conwy, Caerphilly and Castell Coch) do not fare better than sites without it. This is very different from the 2014 finding, when sites with improved interpretation fared much better.
- 3.50 Caerleon fares particularly well, with nearly all (95%) of its visitors saying the information is novel and appealing. St Davids Bishop's Palace also fares very well.

Likelihood of returning

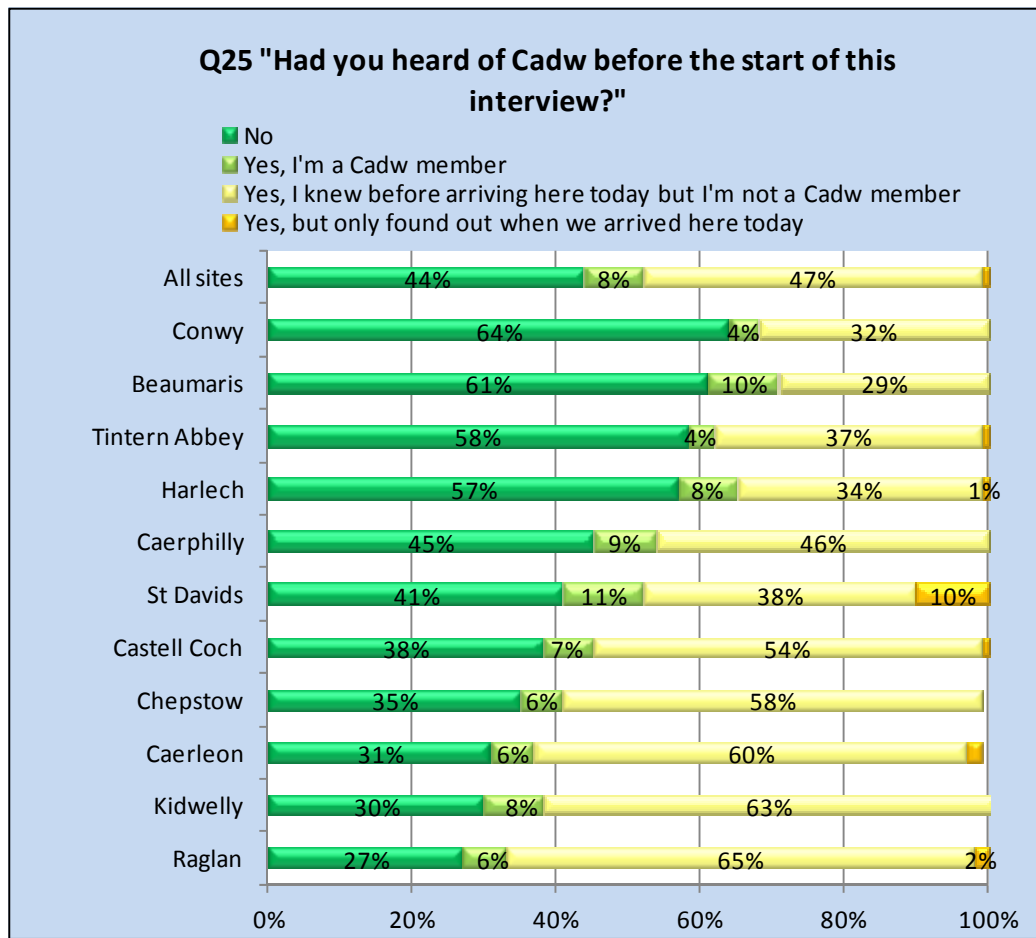


Base: 1,604

Likelihood of revisiting soon varies considerably by circumstances

- 3.51 As many (41%) shoulder season visitors are holidaymakers, the likelihood of returning to the same attraction within 12 months probably depends on them taking another holiday in the same area in that time if they live too far away to take a day trip. Two in three (67%) day trippers are likely to return to the same attraction within 12 months, compared to a much lower proportion (28%) of holidaymakers.
- 3.52 This difference between visitor profiles mostly explains why Caerphilly Castle and Castell Coch feature at the top of the above chart (they have the highest proportions of day trippers), and why Beaumaris Castle has a high proportion of respondents 'very unlikely' to visit again within 12 months.

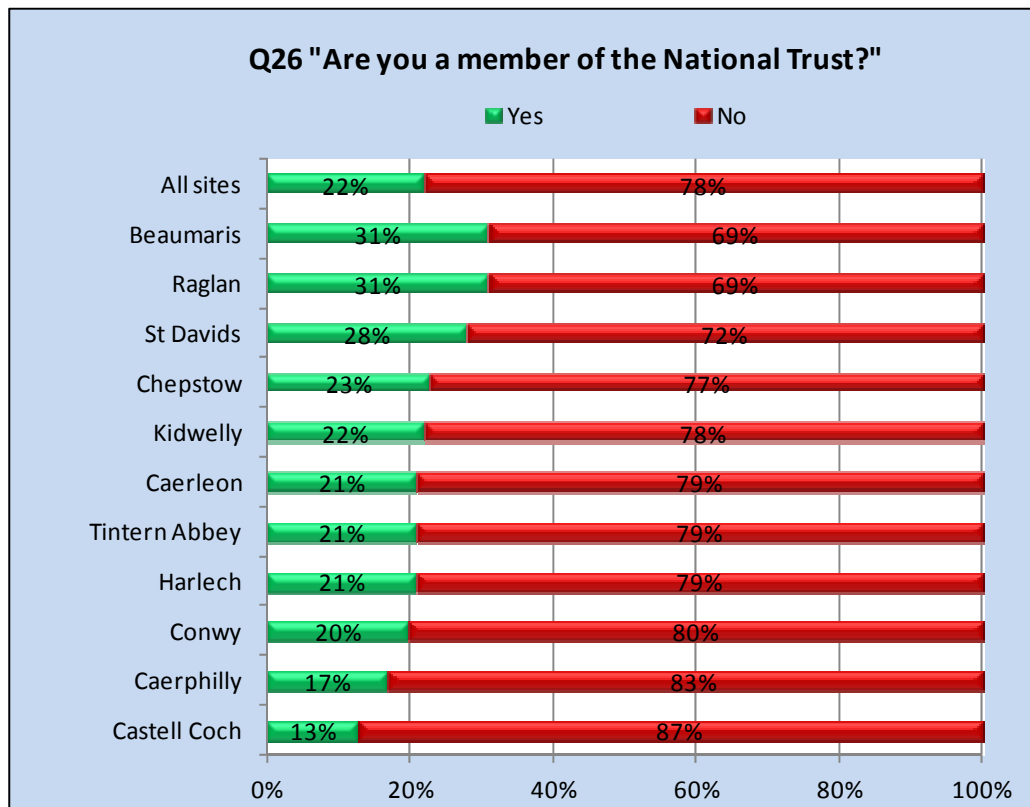
Awareness of Cadw



Slight increase in awareness of Cadw since 2013

- 3.53 Slightly over half (55%) of respondents were aware of Cadw before arriving at the attraction. This is a slight increase from 2013 (50%).
- 3.54 As was also the case in 2013, awareness of Cadw is generally much higher among visitors to South Wales sites than North Wales sites.

National Trust Membership



Base: 1,604

National Trust membership varies by site

3.55 About one in five (22%) visitors are National Trust members. This varies by site, shown above.

4. Conclusions and Implications for Cadw

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

Differences in visitor profile

Welsh residents and slightly younger age profile

- 4.2 The origin of visitors in the shoulder season differs significantly to the peak season. The Welsh day-trip market appears to be more important in the shoulder season as the UK and overseas visitor markets to Wales are not yet in full flow. This may affect where and how Cadw markets its attractions at this time of year.
- 4.3 The 25 – 34 age group is more prominent in the shoulder season. From the Visit Wales Off-peak visitor survey in 2013/14, one possible explanation may be the need of parents to get out of the house with their young children all year round regardless of the colder weather. This seems a good opportunity for Cadw in the shoulder season, as parents with young children are actively looking for things to do.

Visit expectations and satisfaction

Visitors leave feeling very satisfied, but they perhaps didn't expect to

- 4.4 The satisfaction ratings and the ratings compared to expectations have come out very highly. On the one hand this is positive news for Cadw, but on the other hand it raises the question of what visitors expected before they came, and more to the point, what non-visitors would expect and why they don't come.
- 4.5 It would be useful to explore perceptions of non-visitors to Cadw attractions to understand more about the perceived experience and barriers to visiting.

The staff

Very highly rated

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

Shorter dwell times than in peak season

It's cold outside

- 4.7 Dwell times in the shoulder season are significantly shorter than in the peak season, with half of visits lasting less than one hour. Many comments have been made about the weather and muddy outdoors. It may be worth considering what could be done to improve the all-weather offering of Cadw attractions and encourage longer visits.

Improved interpretation

Worthwhile investment for other sites?

- 4.8 In the 'Dwell Time and Satisfaction' Research in 2014 it was clear that investment in improving the interpretation at other sites would be worthwhile, depending on cost.
- 4.9 In this research however, the conclusions are less clear. Having improved interpretation seems to lead to longer dwell times, but not necessarily increased satisfaction with the visit or with the information provided.
- 4.10 Caerleon has fared extremely well in this survey and it would be worth considering what could be learnt from the interpretation and staff there to replicate at other sites.