



STRATEGIC MARKETING

REPORT

Cadw Visitor Satisfaction and Dwell Time

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Strategic Marketing
4 Park Court Mews
Park Place
Cardiff, Wales
CF10 3BD

Tel: ++44 (0)29 2030 3100

Fax: ++44 (0)29 2023 6556

www.strategic-marketing.co.uk

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1. Background

Why this was research conducted?

- 1.1 Cadw has invested in a range of new audio and visual tools at some of its sites to create a more interesting and interactive method of imparting information to visitors.
- 1.2 With further sites earmarked for improved interpretation, Cadw needed to measure what impact, if any, the updated information tools have had on visitor satisfaction and length of stay.

How was the research conducted?

- 1.3 The short self-completion questionnaires – largely designed by Cadw – were sent to each of the 12 sites, where visitors were given the opportunity to complete one on leaving.
- 1.4 To encourage participation, each respondent was entered into a prize draw to win an iPad mini.
- 1.5 The questionnaires were available in both English and Welsh. The English version is attached to this report as an appendix (Tintern Abbey's questionnaire was slightly different in that the word 'castle' was replaced with 'abbey' throughout.)
- 1.6 All completed questionnaires were posted to us, and we manually entered each one before analysing the results ahead of this report.

Sampling

- 1.7 The target sample was 100 completed questionnaires per site. In reality, some sites have been more co-operative than others in encouraging visitors to fill them in.
- 1.8 In total, we received 894 completed questionnaires from the 12 Cadw sites selected for participation in the survey.
- 1.9 The table below shows the sample split by site:

| Castle | Total sample size |
|-------------------|--------------------------|
| Beaumaris Castle | 115 |
| Caernafon Castle | 96 |
| Caerphilly Castle | 63 |
| Castell Coch | 100 |
| Chepstow Castle | 24 |
| Conwy Castle | 80 |
| Criccieth Castle | 101 |
| Harlech Castle | 40 |
| Kidwelly Castle | 100 |
| Raglan Castle | 102 |
| Rhuddlan Castle | 33 |
| Tintern Abbey | 40 |
| Total | 894 |

Report structure

- 1.10 The results to all quantifiable questions are shown split by the 12 sites. For some questions we also group the sites by those having improved interpretation – Caerphilly Castle, Castell Coch and Conwy Castle – and those not yet having it (the other nine sites).
- 1.11 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.

2. Headline Findings

Appreciated information formats at improved sites

- 2.1 Sites with improved interpretation, overall, have a high proportion (61%) of respondents reporting that the format of information is novel and appealing, compared to 36% at sites which have not yet been improved.

Upgraded information gets positive feedback

- 2.2 Nearly two thirds (63%) of respondents visiting sites with improved interpretation report either lots of useful information or that they feel fully informed after their visit.
- 2.3 In comparison, a lower proportion (47%) of visitors at the non-improved sites report the same opinion.

Improved sites more likely to exceed expectations

- 2.4 More than a third (36%) of visitors to Cadw sites with improved interpretation report the information at the attraction exceeded their expectations, compared to 23% at other sites.

Slightly longer dwell time at sites with improved interpretation

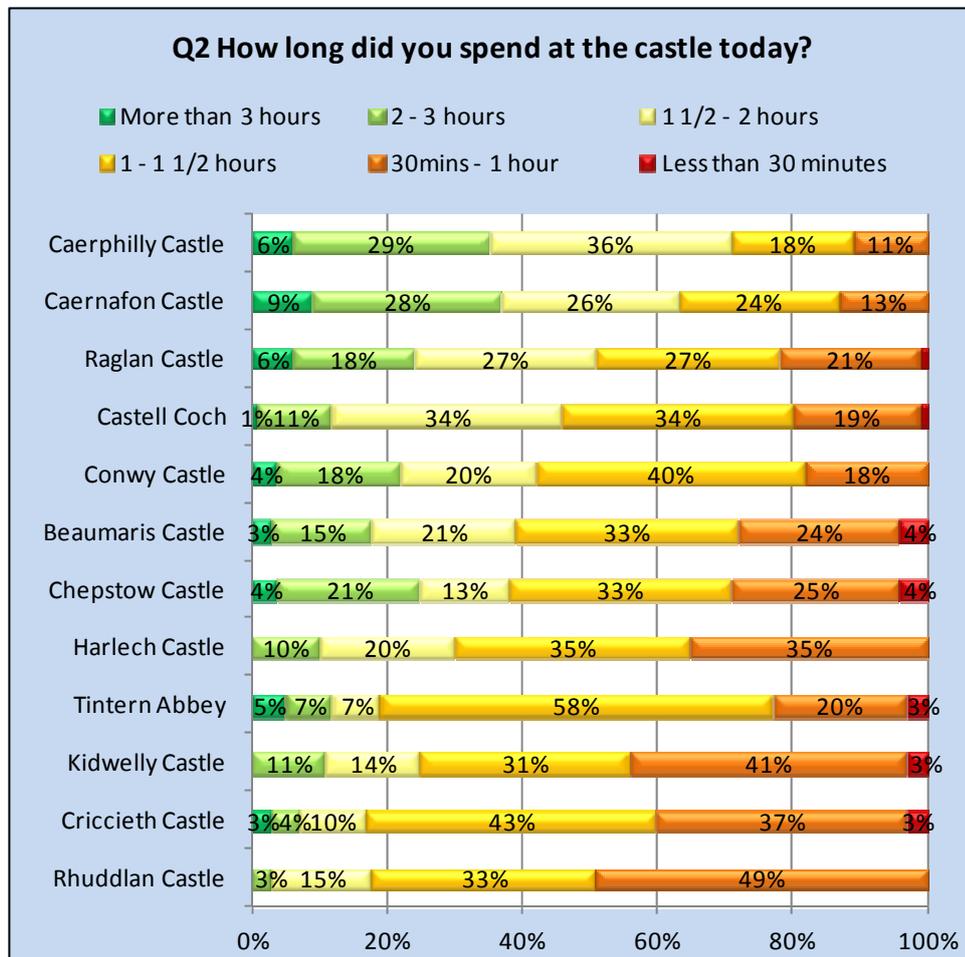
- 2.5 Overall, visitors spend slightly longer at attractions featuring improved interpretation. The overall average dwell time at sites with improved interpretation is approximately 1.6 hours. The average dwell time at sites without improved interpretation is approximately 1.3 hours.

Improvements in information seen at most Cadw sites

- 2.6 Around half of respondents at Castell Coch (52%) and Caerphilly Castle (52%) – two of the castles with improved interpretation – report significant improvements in the castle and information.
- 2.7 Overall, sites with improved interpretation see 49% of respondents reporting significant improvements compared to 30% at sites which have not had improved interpretation.
- 2.8 Only 1% of all respondents report a decline in the castle and information.

3. Results

Length of stay



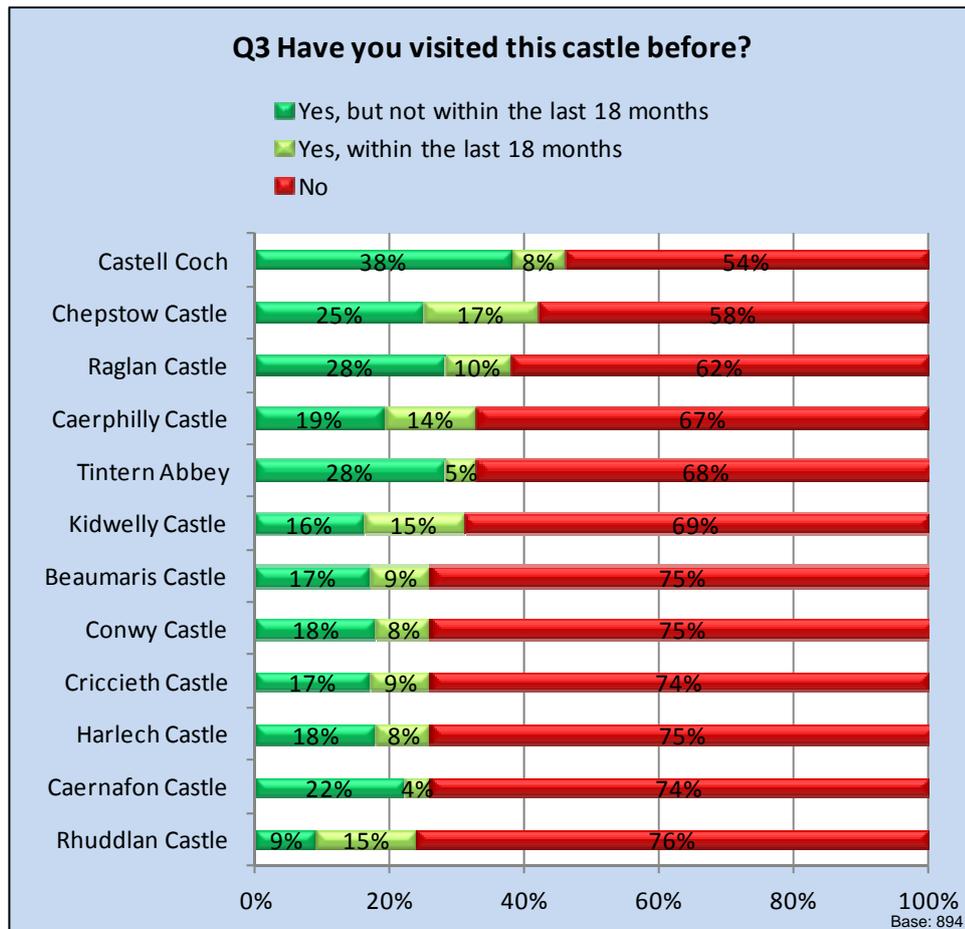
Most stay over an hour

- 3.1 While the length of time people spend at castles varies on location, overall, the vast majority (73%) stay longer than an hour, with the largest proportion (33%) staying between an hour and an hour and a half.
- 3.2 Caerphilly Castle (1.8 hours average) and Caernafon Castle (1.7 hours) have the longest approximate average dwell times. At the other end of the scale, Rhuddlan Castle has the shortest average dwell time (1.1 hours).

Slightly longer dwell time at sites with improved interpretation

- 3.3 Castles with improved interpretation facilities – Caerphilly, Castell Coch and Conwy – are all in the top five sites ranked by average dwell time.
- 3.4 The overall average dwell time at sites with improved interpretation is approximately 1.6 hours. The average dwell time at sites without improved interpretation is approximately 1.3 hours.

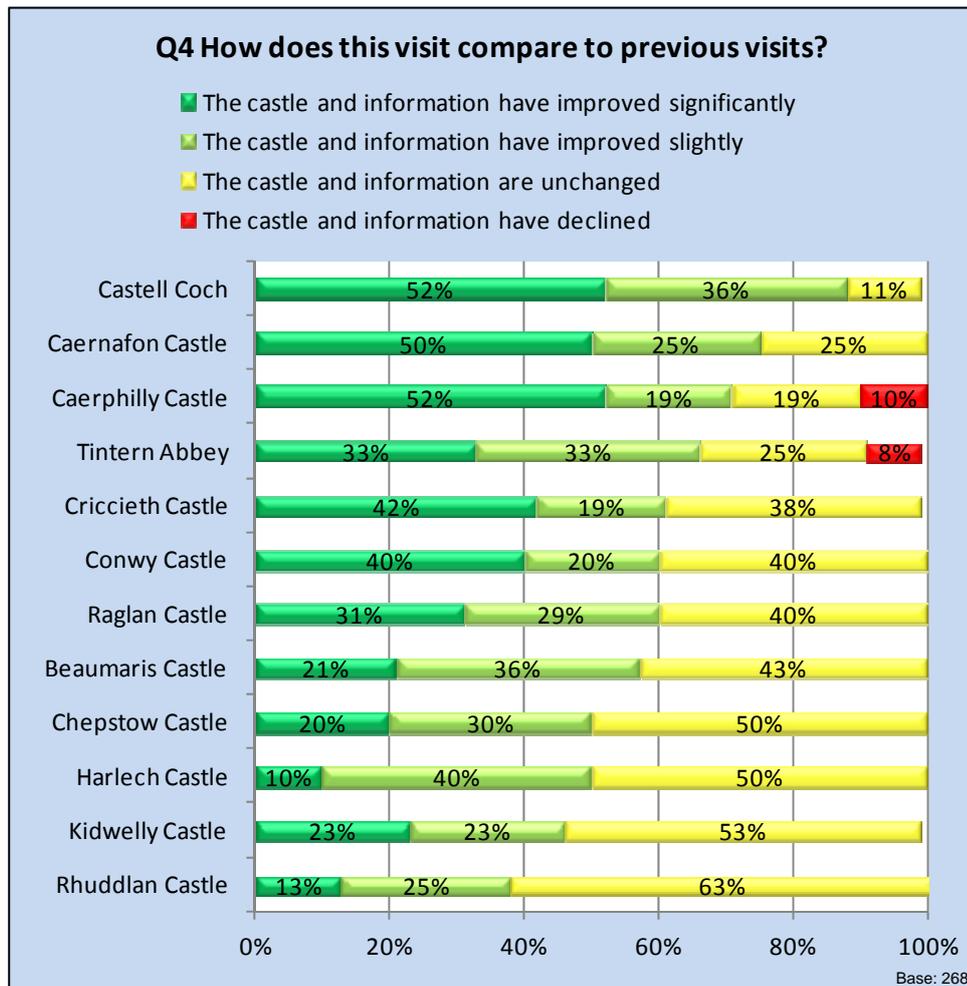
Repeat vs new visitors



South East Wales sites see higher proportions of repeat visitors

- 3.5 Q3 has been included in the questionnaire as a filter question, whereby repeat visitors have been asked further questions comparing this visit with previous visits. Nevertheless, the question also gives interesting findings on the repeat vs new visitor profile for each site.
- 3.6 The five SE Wales sites and the one SW Wales site (Kidwelly Castle) all have a higher proportion of repeat visitors than the six North Wales sites.

Comparing visits



N.B. The sample sizes for this question for most individual sites are very low and so results by site should be interpreted with caution

Positive improvements at Cadw sites

- 3.7 Returning visitors report good improvements at Cadw sites and the information available at them. Overall, more than a third (36%) report the castle they visited and its information has improved significantly. A further 28% have seen slight improvements in the castle and information.
- 3.8 Encouragingly, the castles benefiting from improved interpretation see a much higher combined proportion (49%) of respondents reporting significant improvements compared to those that are currently not improved, where 30% of respondents report significant improvements.

Strong improvements for some

- 3.9 Castell Coch – one of the castles to have received improved interpretations – sees 88% of respondents report either significant (52%) or slight (36%) improvements to the castle and its information.

“Not all of the rooms were available to visit 20 years ago. The audio system is excellent”

Castell Coch

“The podcaster guide was excellent”

Castell Coch

- 3.10 Half (50%) of respondents visiting Caernafon Castle report a significantly improved castle and information, with a further quarter (25%) reporting a slight improvement.

“The guide seems better and there is access to more of the castle”

Caernafon Castle

- 3.11 Caerphilly Castle sees about half (52%) of visitors reporting significant improvements.

“Better information and interactive features”

Caerphilly Castle

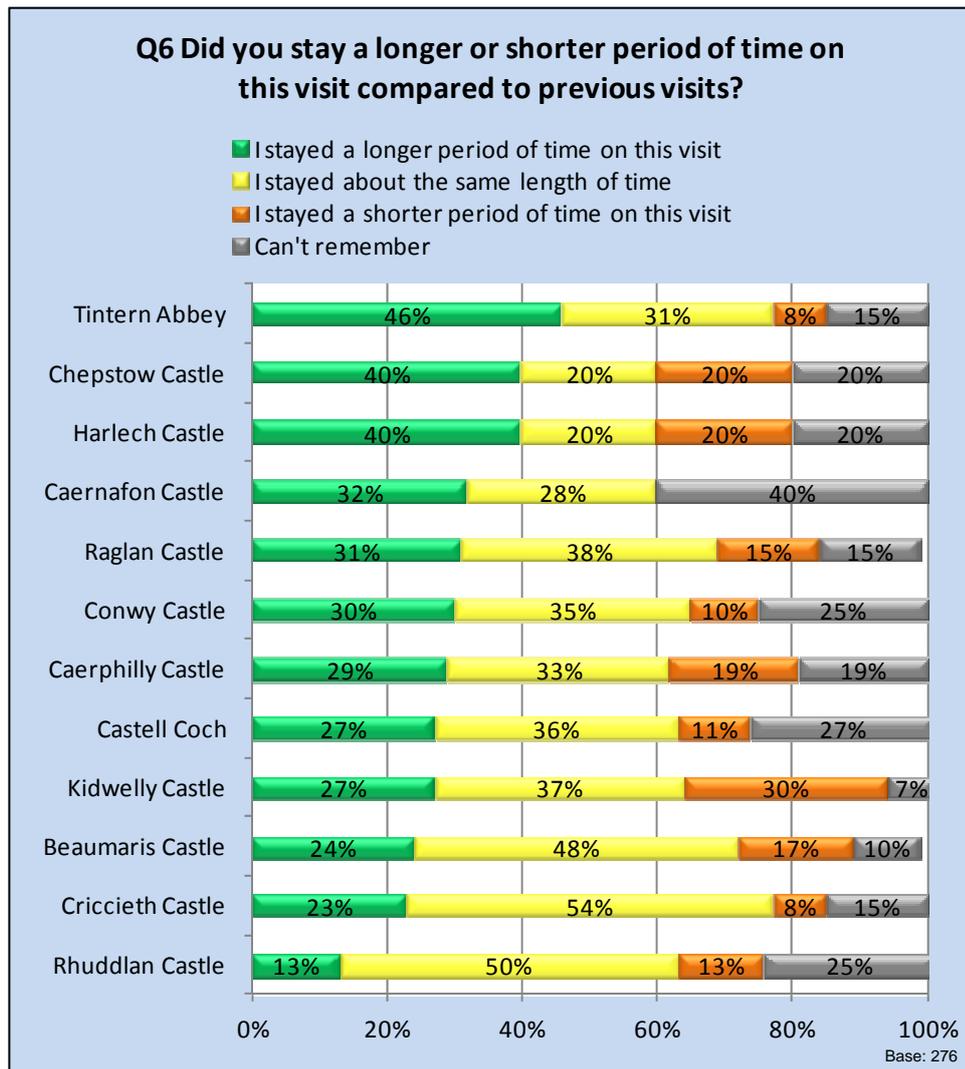
“I was here 20 years ago and renovations were in progress. I am very impressed with exhibitions and use of modern technology”

Caerphilly Castle

Parties with young children more likely to notice improvements

- 3.12 Two in five (40%) parties with young children say that the castle and information have ‘improved significantly’. This compares to a lower proportion (30%) of parties without young children.

Change in dwell time



N.B. The sample sizes for this question for most individual sites are very low and so results by site should be interpreted with caution

Tintern Abbey attracts longer stays

- 3.13 Nearly half (46%) of returning visitors at Tintern Abbey report that their most recent visit to be longer than previous visits, with a further three in ten (31%) reporting it to be about the same length of time.

"There was more to read and see"
Tintern Abbey

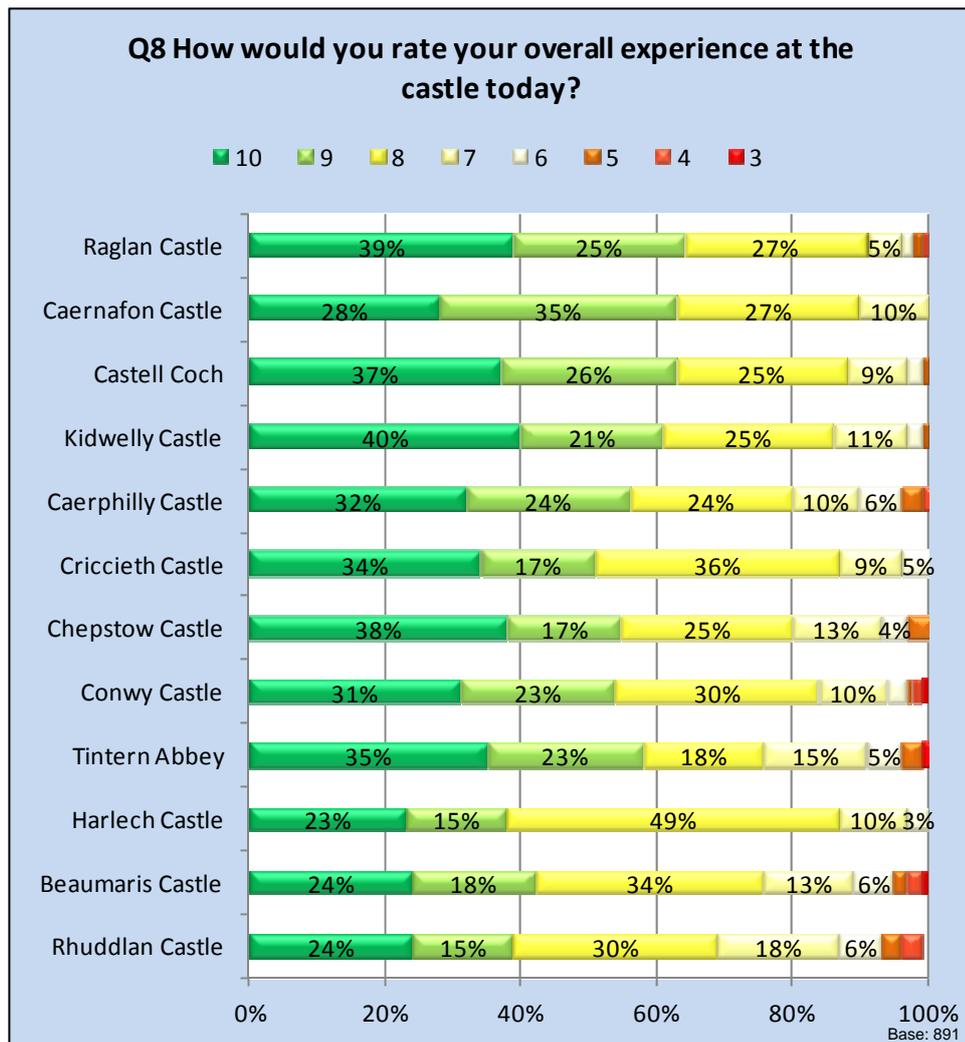
"Nice weather so we had a picnic"
Tintern Abbey

- 3.14 Chepstow and Harlech Castle each see 40% of repeat visitors staying longer, while a third (32%) of visitors returning to Caernafon Castle stay longer.

No significant difference in results between improved and non-improved sites

3.15 While repeat visitors to sites with improved interpretation are staying slightly longer on balance than on their previous visit, their results are not significantly different from the results for non-improved sites. 28% of repeat visitors to improved sites have stayed longer this time, compared to 13% staying a shorter time.

Castle ratings



Excellent ratings for all Cadw sites

3.16 Rating sites from one to ten (one being low and ten being high) for the overall experience, respondents score all sites very well. Raglan Castle scores the

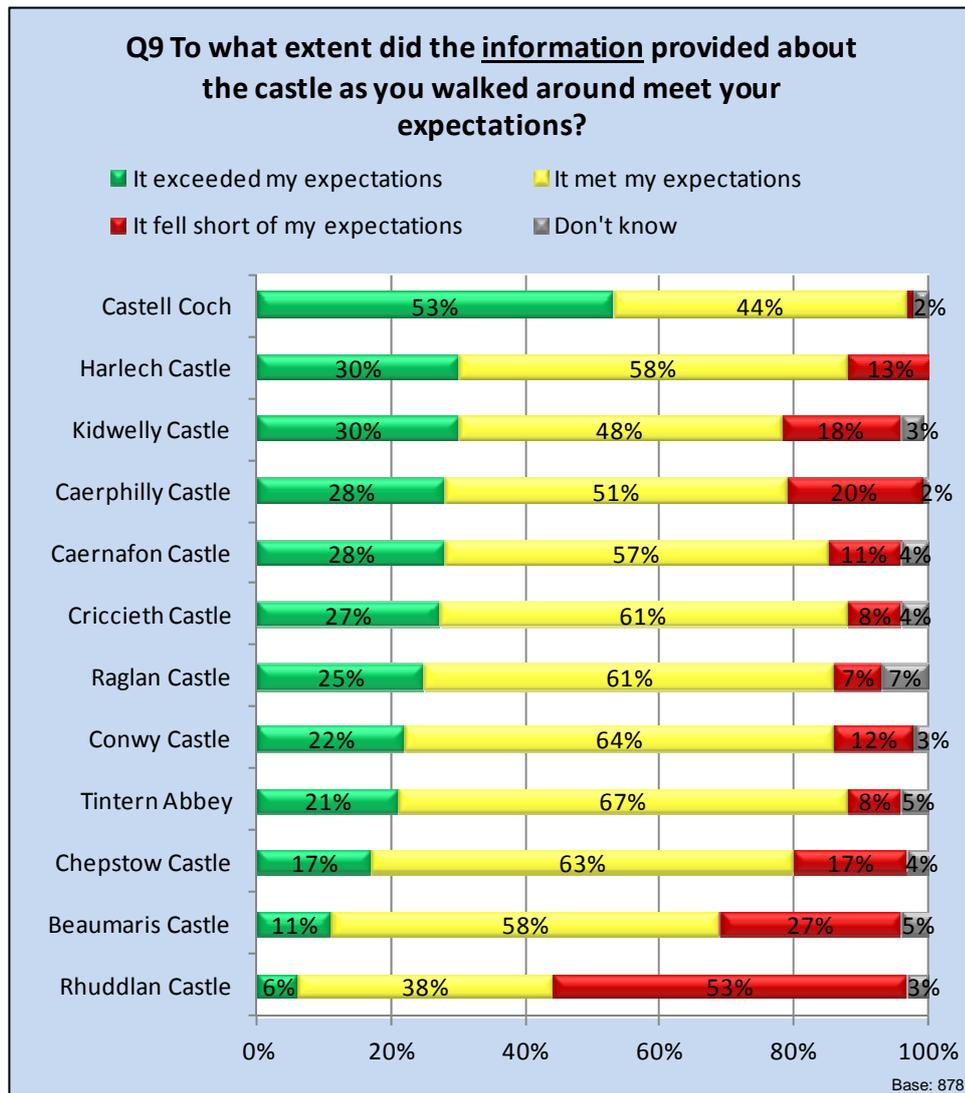
highest, with nearly two thirds (64%) offering a rating of nine or ten and an average rating of 8.9.

- 3.17 Kidwelly Castle, Caernafon Castle and Castell Coch each receive an average score of 8.8, closely followed by a rating of 8.7 at Criccieth Castle.
- 3.18 Receiving the lowest score – but still reasonable – is Rhuddlan Castle, which sees an average rating of 8.1 out of 10.

Little difference made by interpretation improvements

- 3.19 The difference in average rating between improved sites and non-improved sites is negligible. Sites with improved interpretation receive an average score of 8.7 out of 10, compared with 8.6 for those that have not seen the same improvements.
- 3.20 Differences in satisfaction ratings by different party types are also not significant.

Information expectations – are they met?



Castell Coch exceeds expectations

3.21 More than half (53%) of respondents visiting Castell Coch report that their expectations are exceeded when it comes to the information provided about the castle as they walk around the attraction.

Poor response for Rhuddlan Castle

3.22 Contrastingly, 53% of visitors to Rhuddlan Castle report that the information provided fell short of expectations.

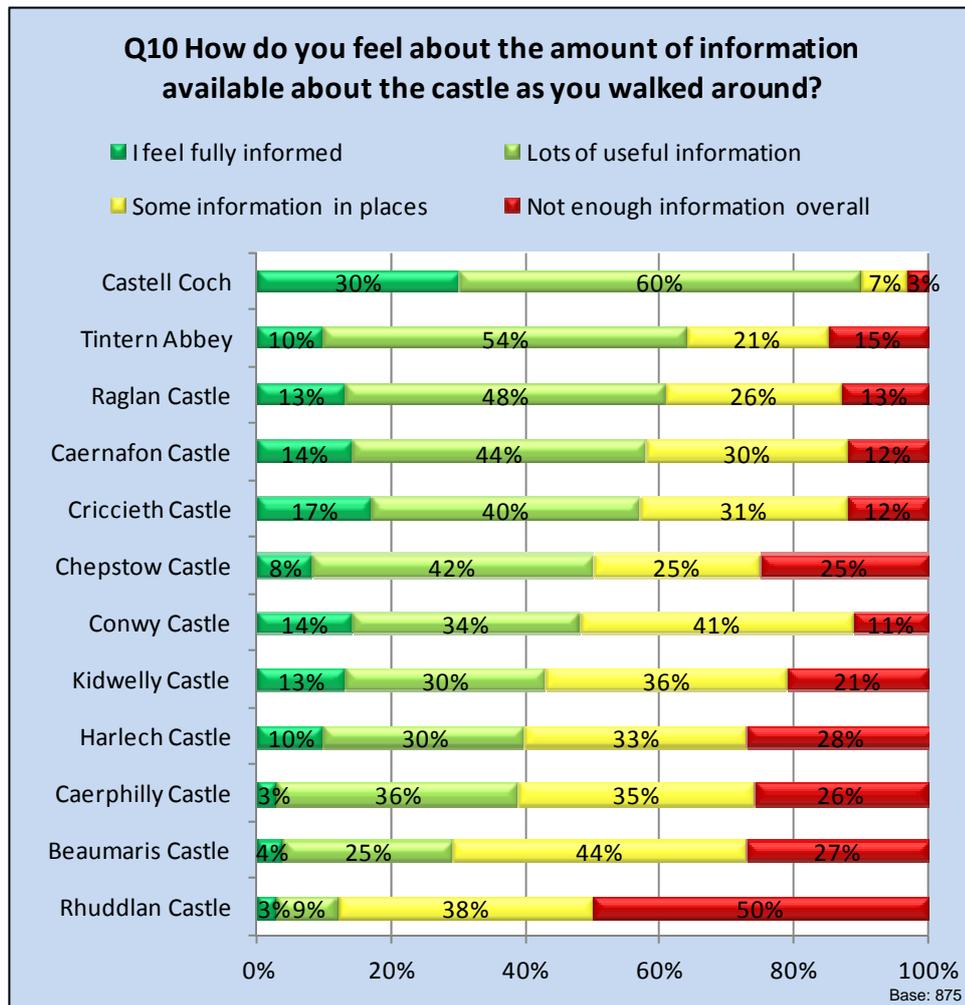


Base: 878

Improved interpretation sites see better results

- 3.23 Sites offering visitors improved interpretations see a higher proportion (36%) of respondents reporting that the information exceeded their expectations, compared to 23% of those visitors at sites that have not had updated interpretation.
- 3.24 Differences by party type are not significant.

Amount of information



Informative experience at Castell Coch

3.25 The information at Castell Coch – one of the castles to have improved interpretation – receives high praise from visitors, with six in ten (60%) respondents reporting there to be lots of useful information at the attraction, and a further 30% feeling ‘fully informed’ after their visit.

Good feedback at other castles

3.26 Visitors primarily report being ‘fully informed’ or receiving ‘lots of useful information’ at other Cadw sites including Tintern Abbey (64% of respondents), Raglan Castle (61%) and Caernafon Castle (58%).

"I liked the wide amount of information available and the information about different periods in time"

Caernafon Castle

"There is plenty of information"

Criccieth Castle

Not enough at Rhuddlan Castle

3.27 Some sites do not have enough information according to around a quarter of visitors – Harlech Castle (28% of respondents), Beaumaris Castle (27%) and Chepstow Castle (25%).

3.28 Opinions rank lowest at Rhuddlan Castle, where half (50%) of all respondents visiting the attraction report there is not enough information at the site.

"More information would have been appreciated"

Rhuddlan Castle

"It lacks the interactive information for children that other castles have"

Rhuddlan Castle

Some feel a lack of information at Caerphilly

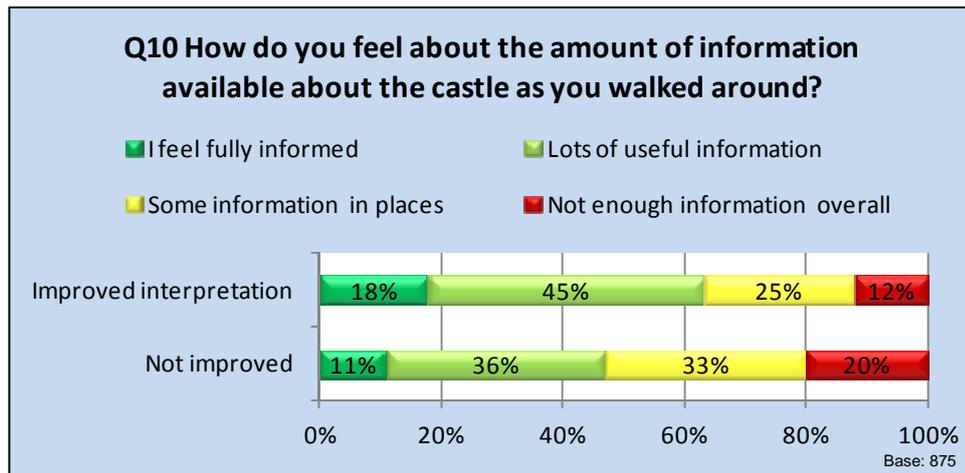
3.29 Despite being one of the sites to have improved interpretation, a quarter (26%) of visitors report there is not enough information overall at Caerphilly Castle. This is reflected in the open comments where, unprompted, a similar proportion (24%) of respondents report there to be a lack of information at the site.

"Would like to see more emphasis on virtual interaction, but that said what is already here is great, too"

Caerphilly Castle

"A listening post as at Castell Coch would be a boon as so much history could be told"

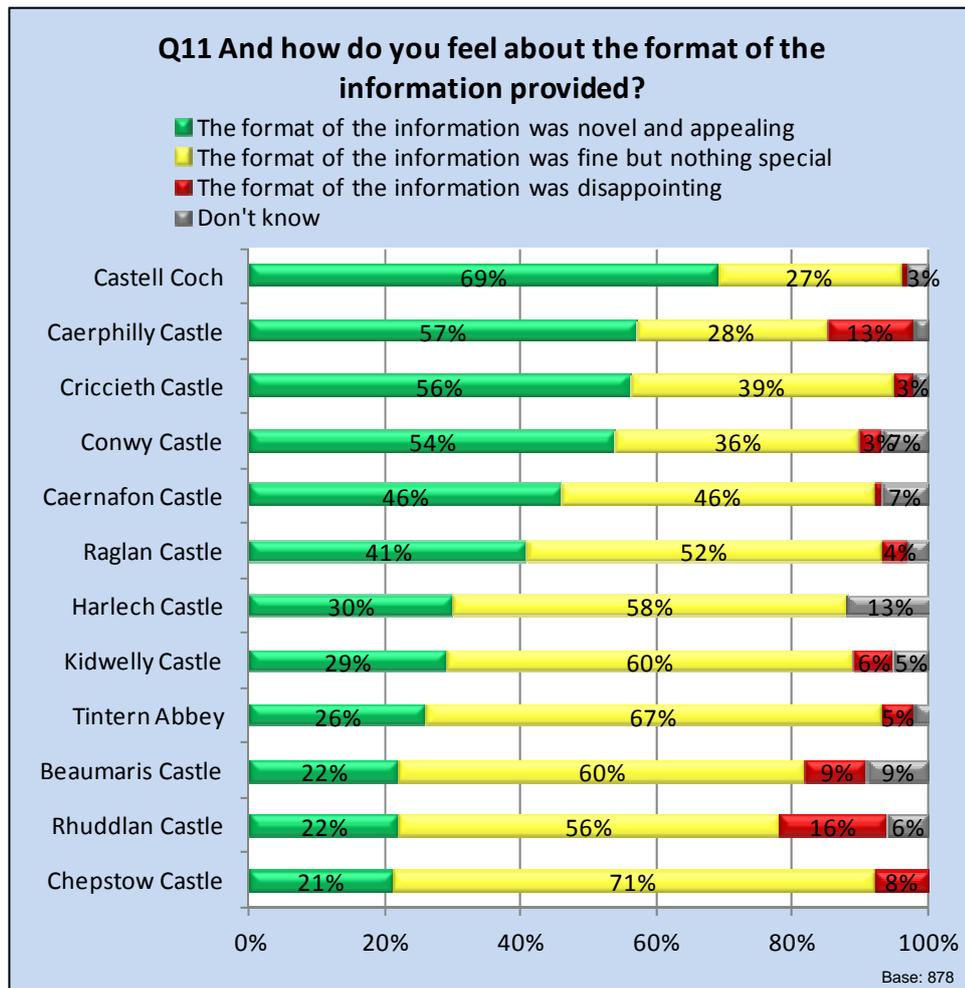
Caerphilly Castle



Better response overall to information at improved sites

- 3.30 Overall, a higher percentage (18%) of visitors at sites with improved interpretation report they feel 'fully informed' after the visit, compared with 11% at sites that have not seen improvements.
- 3.31 Similarly, a larger proportion (45%) of visitors to improved sites feel there is 'lots of useful information', compared to 36% at the non-improved sites.
- 3.32 However, the difference in results is mostly down to the very high satisfaction with information at Castell Coch.

Information format



Novel and appealing information at improved interpretation sites

3.33 The three castles which have had interpretation improved – Castell Coch, Caerphilly Castle and Conwy Castle – rate in the top four by visitors for a novel and appealing information format.

3.34 More than two thirds (69%) of visitors to Castell Coch report the format of information to be 'novel and appealing'.

"I liked the audio talk - it took me around the castle and I learned a lot"
Castell Coch

"The effective audio guide with the room activators"
Castell Coch

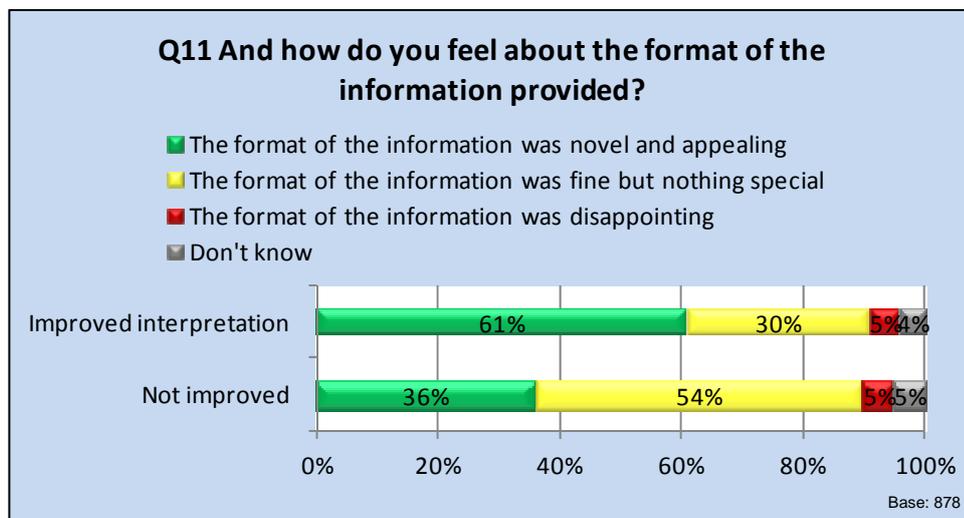
3.35 Over half (54%) of responding Conwy Castle visitors also believe the site's information to be novel and appealing, with some open comments revealing visitors to be pleased with the challenges for children, which includes a quiz.

Less information but more appealing at Caerphilly

- 3.36 While, at Q10, a quarter (26%) of respondents report there to not be enough information at Caerphilly Castle – one of the sites that has improved interpretation – 57% of visitors believe the format of the information to be ‘novel and appealing’.

“The interactive screens were enjoyed by both children and they learned a lot”
Caerphilly Castle

“The two AV presentations are very good – need more elsewhere in the castle”
Caerphilly Castle



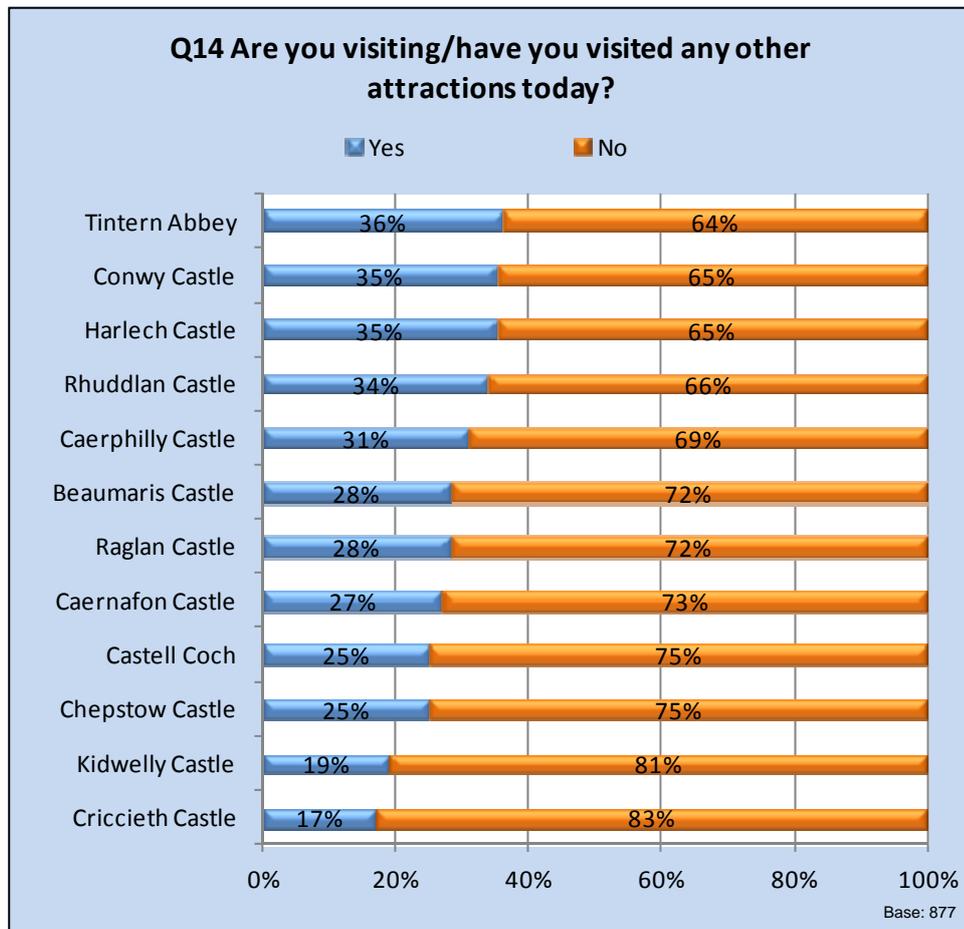
Large difference after interpretation improvements

- 3.37 A much larger proportion (61%) of visitors to castles with improved interpretation report the format of information to be novel and appealing, compared to 36% of respondents at other sites.

Improved interpretation is particularly appealing for parties with young children

- 3.38 About seven in ten (70%) respondents with young children in their party at sites with improved interpretation say that the information was ‘novel and appealing’. This compares to a lower proportion (50%) of parties at the same sites without young children.

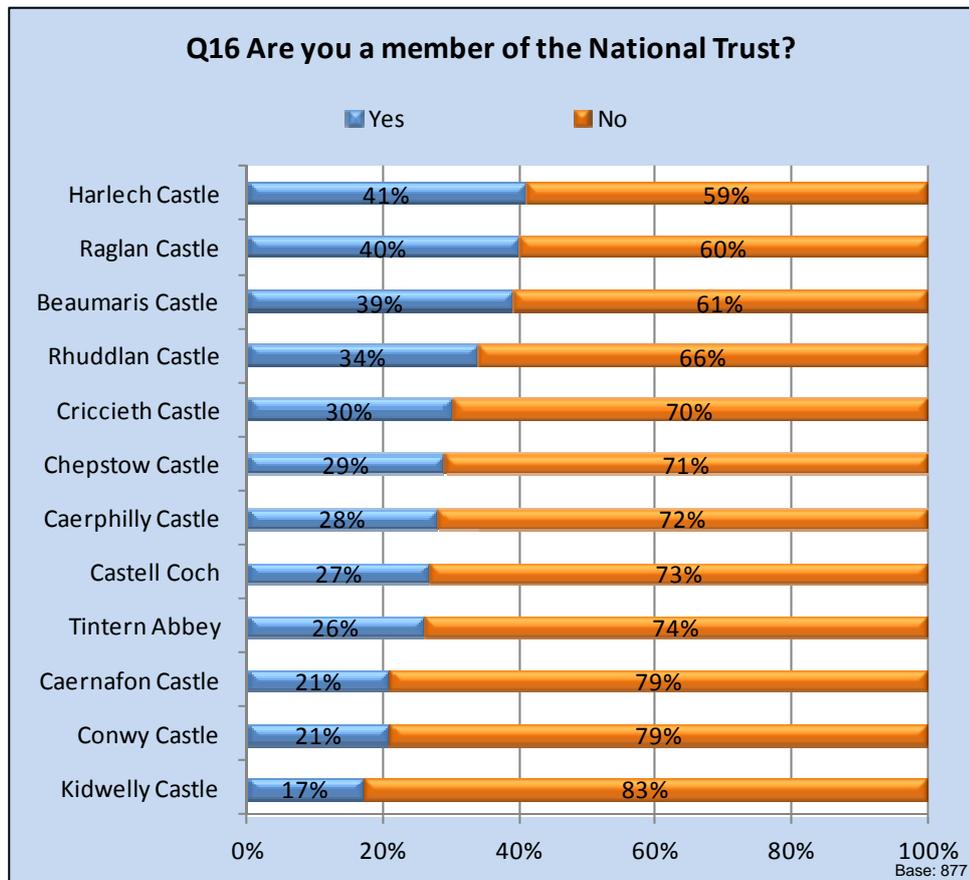
Other attractions



Majority do not visit other attractions

- 3.39 Overall, around three quarters (73%) of visitors to the 12 Cadw sites do not visit any other attractions on the same day. This perhaps increases the importance of satisfaction at Cadw attractions, as the quality of many parties' day out hinges on a good experience at the castle.
- 3.40 Differences by party type are mostly not significant, but families with young children are the least likely to visit other attractions on the same day (19% of respondents).

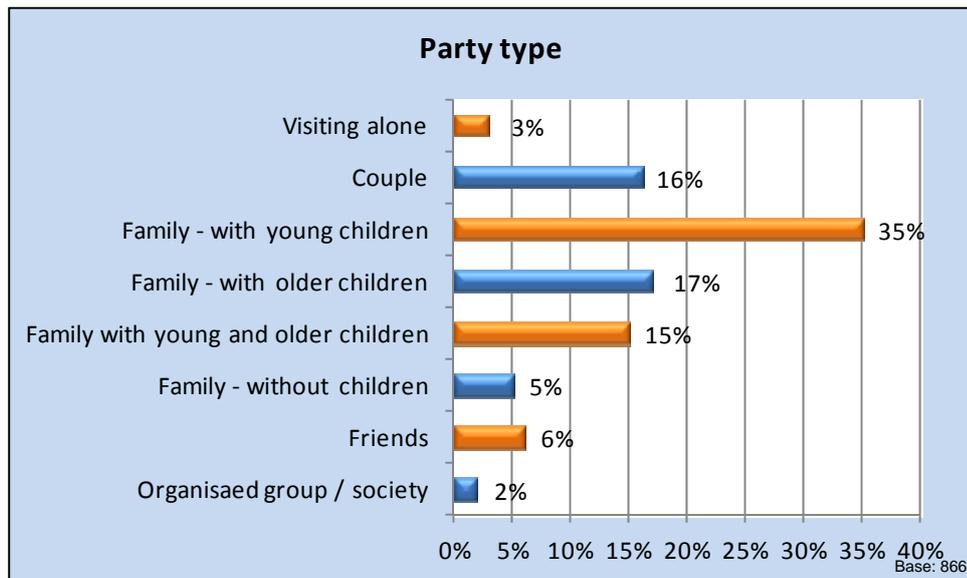
National Trust membership



Generally more National Trust members in North Wales

3.41 Overall, 29% of respondents report to be a member of the National Trust. Four of the top five sites in terms of attracting National Trust members are in North Wales.

Party type



Party profiles by individual sites are best viewed in the accompanying cross-tabs

Families with children during the summer holidays

3.42 Two in three (67%) respondents are families with children. Most questionnaires have been filled in during the school summer holidays and so the above chart should be interpreted in this context.

4. Implications for Cadw

4.1 Here we discuss the implications for Cadw based on the research findings.

Improved interpretation is well received and seems worthwhile investing in

4.2 Overall, visitors have responded positively to seeing improved interpretation. Visitors to sites with improved interpretation are more likely to:

- Say that the information is novel and appealing
- Perceive significant improvements in the castle and the information
- Stay longer
- Have their expectations regarding information provision exceeded

4.3 On this basis it would appear that improved interpretation at other sites is worthwhile, depending on the cost.

4.4 There are however a few points to bear in mind:

- Sites with improved interpretation do not achieve higher visitor satisfaction than those without – rather the *expectations* regarding *information provision* are more likely to be exceeded
- Dwell times at sites with improved interpretation are longer than at sites without, but repeat visitors do not report to stay longer than their previous visit compared to non-improved sites. There are however many factors at play here, including being able to define exactly when their previous visit was (before, during or after improved interpretation) and at what time of year the previous visit was taken.
- Much of the positive results for sites with improved interpretation depend on Castell Coch. It seems that improvements made at Caerphilly and Conwy Castles have not had the same impact.

Improved interpretation is especially appealing to parties with young children

4.5 Parties with young children are more likely to find improved interpretation appealing. In the busy summer season, this demographic group is particularly important to Cadw and so it seems right that the improvements made should hit the mark with them.

Visitor Survey



Thank you for giving up a few minutes of your time. All completed questionnaires will be entered into a prize draw to win an iPad Mini.

Please enter your email address if wish to be entered into the prize draw:

Q1 Which castle have you visited today?

Q2 How long did you spend at the castle today?

| | | | |
|---------------------------|--------------------------|------------------------|--------------------------|
| Less than 30 minutes..... | <input type="checkbox"/> | 1½ to 2 hours..... | <input type="checkbox"/> |
| 30 minutes to 1 hour..... | <input type="checkbox"/> | 2 to 3 hours..... | <input type="checkbox"/> |
| 1 to 1½ hours..... | <input type="checkbox"/> | More than 3 hours..... | <input type="checkbox"/> |

Q3 Have you visited this castle before?

| | | |
|---|--------------------------|----------|
| No | <input type="checkbox"/> | Go to Q8 |
| Yes, within the last 18 months..... | <input type="checkbox"/> | Go to Q4 |
| Yes, but not within the last 18 months..... | <input type="checkbox"/> | Go to Q4 |

Q4 (If visited before) How does this visit compare to previous visits? (Tick one only)

| | |
|---|--------------------------|
| The castle and information are unchanged..... | <input type="checkbox"/> |
| The castle and information have improved slightly..... | <input type="checkbox"/> |
| The castle and information have improved significantly..... | <input type="checkbox"/> |
| The castle and information have declined..... | <input type="checkbox"/> |

Q5 Please comment on your answer to Q4:

Q6 Did you stay a longer or shorter period of time on this visit compared to previous visits?

| | | |
|--|--------------------------|----------|
| I stayed a longer period of time on this visit | <input type="checkbox"/> | Go to Q7 |
| I stayed a shorter period of time on this visit..... | <input type="checkbox"/> | Go to Q7 |
| I stayed about the same length of time..... | <input type="checkbox"/> | Go to Q8 |
| Can't remember..... | <input type="checkbox"/> | Go to Q8 |

Q7 Why did you stay a longer or shorter period of time on this visit?

Q8 How would you rate your overall experience at the castle today on a scale of 1 to 10, where 1 is poor and 10 is excellent?

| | | | | | | | | | | | | | | | | | | | |
|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|----|--------------------------|
| 1.. | <input type="checkbox"/> | 2.. | <input type="checkbox"/> | 3.. | <input type="checkbox"/> | 4.. | <input type="checkbox"/> | 5.. | <input type="checkbox"/> | 6.. | <input type="checkbox"/> | 7.. | <input type="checkbox"/> | 8.. | <input type="checkbox"/> | 9.. | <input type="checkbox"/> | 10 | <input type="checkbox"/> |
|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|-----|--------------------------|----|--------------------------|

Q9 To what extent did the information provided about the castle as you walked around meet your expectations?

It exceeded my expectations *It fell short of my expectations*
It met my expectations *Don't know*

Q10 How do you feel about the amount of information available about the castle as you walked around? (*Tick one only*)

Not enough information overall *Lots of useful information*
Some information in places *I feel fully informed*

Q11 And how do you feel about the format of the information provided? (*Tick one only*)

The format of the information was novel and appealing
The format of the information was fine but nothing special
The format of the information was disappointing
Don't know

Q12 What did you like about the castle?

Q13 What did you dislike about the castle?

Q14 Are you visiting / have you visited any other attractions today?

Yes Go to Q15 No Go to Q16

Q15 Which other attractions have you visited / are you visiting today?

Q16 Are you a member of the National Trust?

Yes No

Q17 Which of the following best describes your personal party here today? (*Tick one only*)

Visiting alone *Family - without children*
A couple *Friends*
Family - with young children *Organised group / society*
Family - with older children *Other*
Family - with young and older children

Please specify other

Q18 What is your home postcode? (*This is useful information for us to understand where our visitors come from. If you do not know your full postcode, please enter the first half of it.*)

Thank you very much for your time. Please hand in this completed questionnaire in the shop.