

Barriers to visiting heritage sites

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Macro Barriers to Visiting Heritage, Cadw 2022

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

Social Research number: 68/2022

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1. Summary

- 1.1 Cadw commissioned this research to understand the barriers to visiting heritage sites among consumers who already take leisure days out. The research was required to inform Cadw's Audience Development Plan.
- 1.2 Online panel surveys were conducted in Wales (832 sample size) and England & Scotland (2,919), followed up with six online focus groups. All respondents go on days out, but heritage sites are not one of their preferred types of place to visit.
- 1.3 All numbers and percentages quoted are from the online panel survey in Wales, unless stated otherwise. Qualitative findings from the focus groups were used to explain the quantitative findings in greater depth, and the England & Scotland panel results to compare against Wales where significantly different.
- 1.4 The most frequently mentioned (48%) group of similar words unprompted to describe a day out experience is 'calm / chilled / peaceful / relaxing'. This has also dominated focus group discussions, where participants have elaborated that the need to 'get away from it all' is ideally spent in the natural outdoors.
- 1.5 Several factors combine to deter infrequent / non-visitors from visiting heritage sites more often or at all. The top six prompted reasons are:
 - Not easy enough to get to for a day out (26%)
 - Don't know enough about what's there to do / see (23%)
 - Sounds boring (22%)
 - Don't offer affordable ways of entering (20%)
 - Not value for money (19%)
 - Don't think it's interesting for children (18% overall, but the top answer (45%) among families with young children)

Open feedback shows that most infrequent / non-visitors are in fact interested to some extent in learning about the history of heritage sites. The barriers are that this

interest can be very time-limited or does not extend beyond one visit to the same place, can depend on who they are going with (especially children) and whether the entry price is deemed worthwhile.

1.6 There is much that Cadw can do or already is doing which would encourage visits. When prompted about developments that respondents were not previously aware of, the following proportions say this would 'definitely' make a difference to their likelihood of visiting:

- More onsite cafés or restaurants (43%) – could increase dwell time and therefore perception of whether the visit is worthwhile
- More interactive information besides just reading (37%) – especially among families with young children (49%), who say that their children won't read static information boards, but adults also want the information brought to life
- More for children to do onsite (32%) – especially among families with young children (68%), who won't risk taking their children somewhere they might be bored
- More large-scale events (31%) – music, food, art and crafts have been mentioned; helps to overcome the barrier that once a site has been visited, there is no perceived reason to return
- Improvements that make them more accessible (28%) – for families with pushchairs as well as adults with a mobility disability

1.7 The above points are backed up by the positive reactions in the focus groups to many of Cadw's recent developments, in particular:

- Saint David's Day promotional video – described as 'cute', evokes positive childhood memories and clearly shows how children could enjoy a visit to a heritage site
- Café at Harlech Castle – very attractive location outside of the castle, which allows visitors to view the attraction in full, as well as the surrounding scenery

- Accessibility ramps at Harlech Castle and Tintern Abbey – could change perceptions of inaccessibility for people with mobility issues and pushchairs
- Building blocks at Beaumaris Castle – shows how children can engage in an activity

3. Introduction/Background

- 3.1 Cadw wished to understand the barriers to visiting heritage sites among UK consumers who do not see this type of attraction as a priority for a day out. The research was needed to inform Cadw's Audience Development Plan.
- 3.2 Cadw commissioned Strategic Research and Insight (SRI), an independent agency based in Cardiff, to conduct this research. We have conducted the work in two phases: a quantitative online panel survey, followed by focus groups.

4. Methodology

- 4.1 The quant-qual combination often works well with large-scale research such as this, because the two types of method serve different purposes. Quantitative research measures breadth and scale using large sample sizes and it answers questions like ‘what?’ or ‘how many?’, whereas qualitative research digs into depth and answers questions like ‘why?’.
- 4.2 Online panels are a cost-effective means of reaching a large sample of the population quickly. Coverage of different demographic types across Britain is reliable.
- 4.3 The online panel survey covers: Wales (sample size 832), England (2,119) and Scotland (800).
- 4.4 To qualify for the survey, respondents have to go on days out, otherwise the barriers to visiting heritage sites could be too great for Cadw to realistically try and overcome. However, to qualify, heritage sites are not one of their preferred types of place to visit. Therefore, the sample can be described as ‘infrequent & non-visitors’ to heritage sites.
- 4.5 Response to the survey within each country is representative of that country’s population, and then the qualified sample falls out naturally (after filtering out non-qualifiers as described above). This has given the following qualified samples:

Demographic	Wales	Britain outside Wales
Female	55%	59%
Male	45%	41%
18 – 24	16%	14%
25 – 34	19%	17%
35 – 44	21%	17%
45 – 54	13%	17%
55 – 64	14%	15%
65+	17%	20%

ABC1	56%	57%
C2DE	44%	43%

Base: 832

4.6 Focus groups offer a good opportunity to explore perception in depth and test reactions to visual stimulus. Six focus groups were conducted with selected participants from the panel survey following this structure:

Group 1 Wales No children C2DE	Group 2 Wales Family C2DE
Group 3 Wales Family ABC1	Group 4 Wales No children ABC1
Group 5 England / Scotland Family C2DE	Group 6 England / Scotland No children ABC1

4.7 All sessions were conducted online in March 2022 with four or five participants per group – the optimum number for online focus groups.

4.8 Of primary interest to Cadw was to understand:

(a) Results for Wales

(b) If and how Wales differs from the rest of Britain

Therefore this report focuses on the findings from Wales, whilst highlighting any significant differences from England & Scotland throughout.

4.9 Cross-tabulations for quantified feedback are provided separately by age, gender, party type, region and socio-economic group for Wales and for England & Scotland.

4.10 All numbers and percentages cited in this report are from the online panel survey in Wales, unless stated otherwise. The first eight questions were used for filtering and

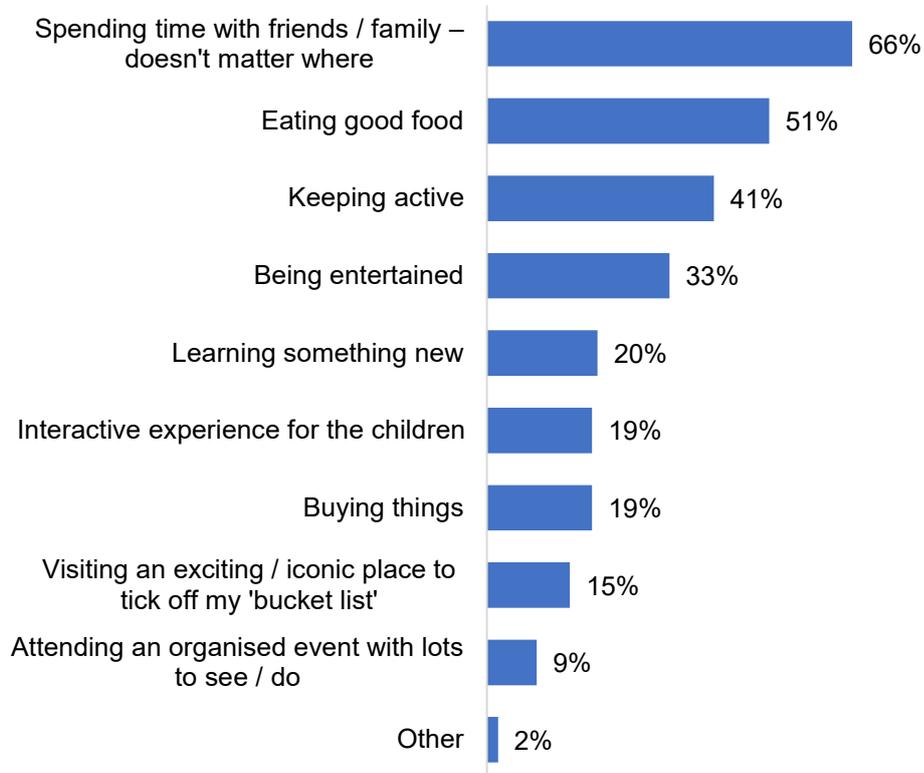
demographics; this report discusses the findings to the main questions from Q9 to Q23.

- 4.11 Qualitative findings from the focus groups were used to explain the quantitative findings in greater depth. Quotations are taken from the focus groups and are labelled with the participant type. Questioning in qualitative research does not follow a set 'script' like a questionnaire; rather, we have explored the quantitative findings in greater depth by probing for detail.

5. Expectations of a Day Out

What do people want to experience on a day out?

Q9 "Please tick up to three statements below which best describe what you want from a day out:"



Base: 832

Spending time with friends / family

5.1 This is the top answer among every age, socio-economic group, region and gender, with or without children. This 'want' from a day out is so strong that the place visited is less important than the company for many.

"We just enjoy the experience of being together and having a day out. We're not nit-picky about the place."

Female, 35 – 44, with young and older children, Wales

Relaxing in nature – getting away from it all

5.2 Not prominent in the quantitative findings but very prominent in the focus groups and open text (discussed later under Q11) is the desire to get away from it all by spending time in natural surroundings. This was not on the prompted list in the quantitative survey, and online survey respondents, especially in panel surveys,

tend not to use the 'please specify other option'. Had it been included in the prompted list, this would likely have been among the top answers.

"Until a year ago I lived near London, so I enjoy the peace and quiet"

Female, 55 – 64, alone, Wales

"I want to see gardens, wildlife, the sea"

Male, 45 – 54, couple, Wales

"We go to the woods because our boys love animals, nature, insects"

Female, 35 – 44, with young and older children, Wales

"Outdoor spaces with kids are so much more important than indoor spaces"

Female, 45 – 54, with young children, Wales

Lockdowns have increased awareness of local outdoor spaces

- 5.3 The pandemic has now made people more aware of their local surroundings, especially peaceful outdoor places in nature. Some of those places now remain on the list of options of places to go for days out.

"You know the local area a lot better than you did two years ago and notice places you previously missed. There's an abbey I found [Talley Abbey] and had been driving past it for years."

Male, 45 – 54, couple, Wales

"Thanks to the pandemic we have found out loads of new places to visit locally"

Female, 45 – 54, with young children, Wales

Eating good food

- 5.4 This is the second most frequent answer in the quantitative survey – given more by adult-only groups (56%) than families with older children (46%) and families with younger children (38%).

- 5.5 Families with young children are more likely to take their own picnic – it can be too much stress and cost to find somewhere to eat with young children.

"The children are not very adventurous with their food. If we go to a café, we normally take something for them."

Female, 35 – 44, with young and older children, Wales

"Kids can't play in a café – it spoils the experience [for the adults]"

Female, 35 – 44, with young children, Wales

Need to keep active increases with age; need to be entertained decreases

- 5.6 Around half (47%) of over 45s have chosen ‘keeping active’ as one of their top three wants from a day out – this compares to a lower proportion (37%) of under 45s.
- 5.7 The need to be entertained goes the opposite way. Around half (47%) of 18-24s have answered this. The proportion declines with every age group. Only 19% of over 65s say they need to be entertained as one of their top three priorities.

Interactive experience for children

- 5.8 This is the second most frequent (53%) answer among families with young children. The need declines somewhat as the children grow older – 37% of families with older children have answered this. We discuss later the implications of this for attracting more visitors to heritage sites.

Do the results for Wales differ from the rest of Britain?

- 5.9 No – the order of the answers to Q9 is almost exactly the same, with percentages which do not vary from Wales to any statistical significance.

“We go to a country park in East Kilbride, 30 minutes away. It’s a big open space, has woodland walks, play parks, a small animal sanctuary – and it’s cheap – £1.90 for an adult and 90p for a child. The swing park for kids is the best bit, but also walking round water. It’s a beautiful place.”

Female, 25 – 34, young children, Scotland

“The pandemic has really changed how I view going out for the day. We explore new things now. I own walking boots for the first time in my life.”

Female, 45 – 54, couple, England

Words used to describe the day out experience

**Q11 “You answered earlier that ... is one of your preferred types of place to visit for a day out. What three words best describe the experiences you have there?”
(unprompted)**

Word / words	No. / % of respondents mentioning the word/s	
Calm / chilled / peaceful / relaxing	401	48%
Fun	180	22%
Picturesque / scenic / beautiful	111	13%
Fresh air	92	11%
Exciting	88	11%
Beach / sand / sea	73	9%
Wildlife / nature	65	8%
Café / food / fish and chips / ice cream	61	7%
Active / exercise	56	7%
Adventure / adrenaline	53	6%
Shopping	48	6%
Family	43	5%
Happy	43	5%

Base: 832

The table shows words mentioned by at least 5% of respondents

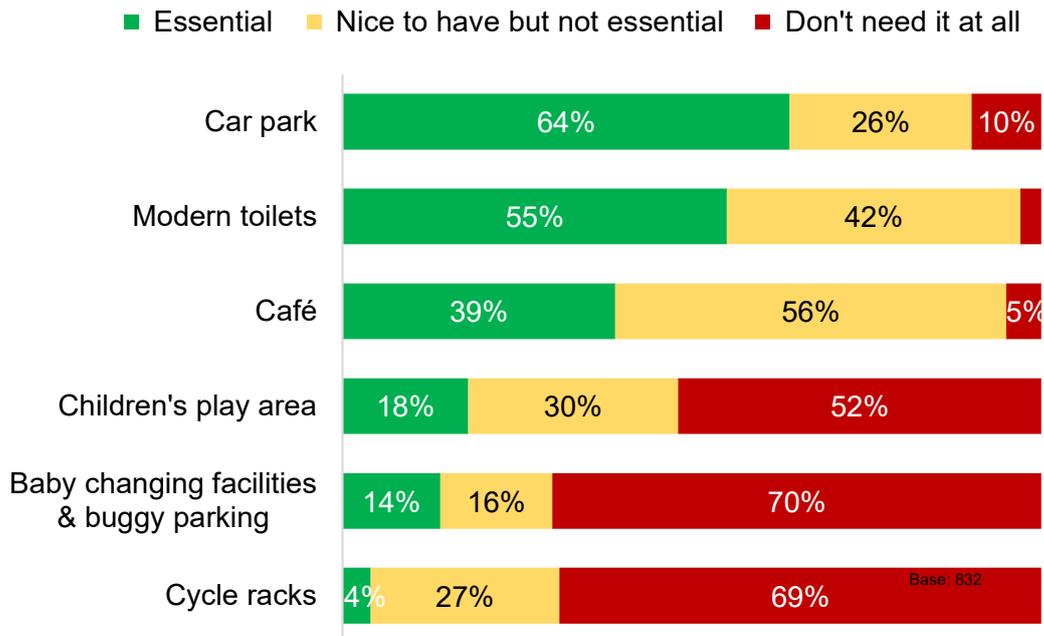
Calm, relaxing experience in the natural outdoors

- 5.10 Many respondents want to get away from their everyday life when they go on a day out. This often involves going somewhere scenic where they can relax, enjoy the peace and appreciate the views.
- 5.11 Words along this general theme dominate the unprompted answers given to the above question, and the focus group participants back this up. It may well have been the top answer to the earlier Q9 if it had been prompted.

“When you’ve had a hard week, it’s nice on a Saturday to get up and go out for some peace”
 Female, 55 – 64, couple, Wales

What facilities do people need on a day out?

Q10 "How essential are each of the following in places you like to visit for a day out?"



Base: 832

Need to park the car

5.12 Not all Cadw sites have their own car park, but the need for one is considered 'essential' by the majority of every respondent type.

“If there wasn’t allocated local parking as part of the specific place I’m going, it would deter me from going. The uncertainty – will I find somewhere, how much will it cost? It depends who you go with as well. I sometimes take my nan – we have to have convenient parking.”

Female, 18 – 24, couple, Wales

“Parking prices stop me from going to a lot of places”

Female, 25 – 34, with older children, Wales

5.13 If parking has to be paid for, the beneficiary of the payment can make a difference to whether drivers feel like they want to pay.

“We’re more inclined to pay for parking if the money goes to the place or a good cause. We went to Newport Wetlands and the money goes to the RSPB. Whereas I would be put off paying a lot to park in an NCP.”

Male, 35 – 44, with young children, Wales

Modern toilets – significant concern for over 65s

5.14 Many (71%) over 65s say that modern toilets are essential for a day out. This compares to 51% of under 65s.

Café

5.15 About two in five (39%) consider a café to be essential. The proportion is higher among families with older children (47%) and women (44%).

“My 19 year old daughter ‘tolerates’ days out with us. The best bit for her is having a treat in a café.”

Female, 35 – 44, with young and older children, Wales

Children’s facilities

5.16 Around half (48%) of families with young children consider a children’s play area to be essential, and about a third (34%) consider baby changing facilities & buggy parking essential.

“Our youngest needs facilities for nappy changing when we go somewhere”

Female, 45 – 54, with young children, Wales

Do the results for Wales differ from the rest of Britain?

5.17 No – the findings for Wales are consistent with the findings for the rest of Britain.

“If we go somewhere new, we make sure there are places to eat, toilets”

Female, 55 – 64, couple, Scotland

6. Barriers to Visiting Heritage Sites

Words used to describe perceptions of heritage sites

Q12 “If you were to visit a heritage site, what three words best describe the experience you would expect to have there?” (unprompted)

Word / words	No. / % of respondents mentioning the word/s	
Educational / learning / informative / knowledge	324	39%
Interesting / entertaining	293	35%
Historical / history	281	34%
Boring / dull	158	19%
Fun / enjoyable / exciting	132	16%
Calm / chilled / peaceful / relaxing	70	8%
Scenery / views / beautiful	60	7%
Ancient / old	52	6%
Café / eating out	41	5%

Base: 832

The table shows words mentioned by at least 5% of respondents

Learning something new

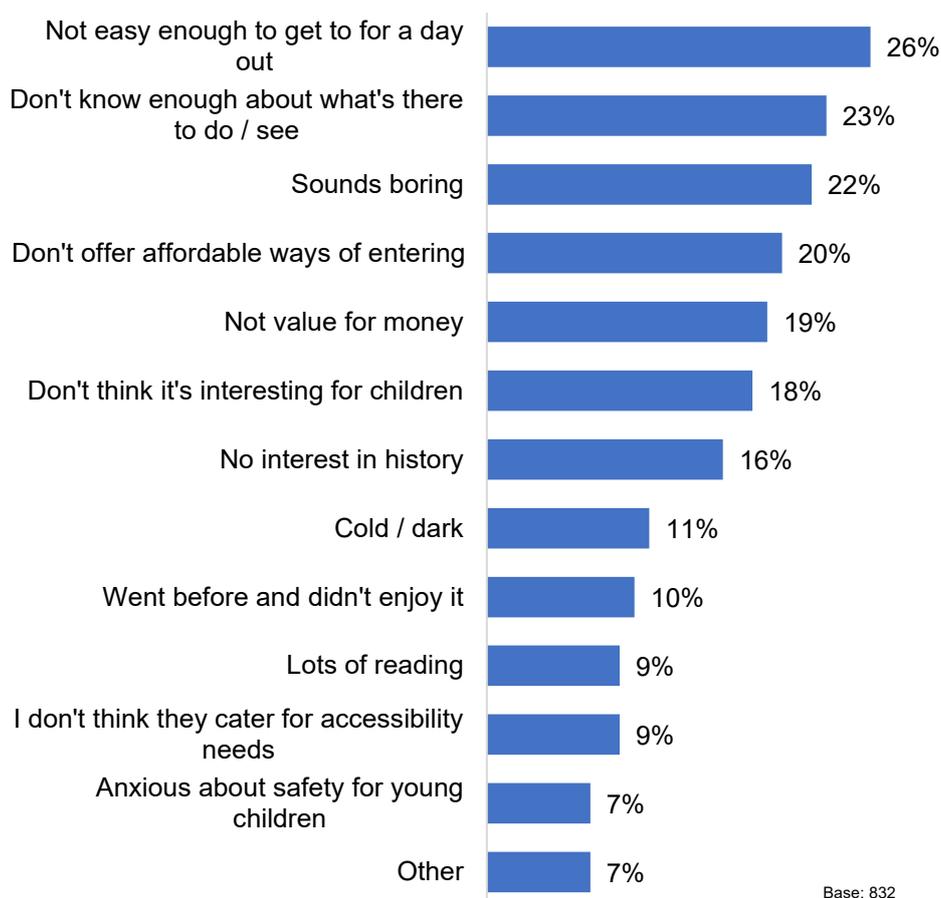
- 6.1 The most common word group associated unprompted with heritage sites is to do with being informed and educated.
- 6.2 Some associate heritage sites with words like ‘boring’ or ‘dull’. However, this is easily outweighed by people using opposite words like ‘interesting’ and ‘fun’.
- 6.3 Some also use similar to words to those used to describe their favourite days out, like ‘calm’, ‘relaxing’ and ‘scenery’.

Why then are these respondents not visiting heritage sites often / at all?

- 6.4 The prevalence of positive words to describe expected experiences at heritage sites prompts the question of why these infrequent / non-visitors are not visiting more often or even at all.
- 6.5 We discuss next how interest can be very time-limited or does not extend beyond one visit to the same place, can depend on who they are going with (especially children) and whether the entry price is deemed worthwhile.

Reasons for not prioritising heritage sites

Q13 "Are there any particular reasons why heritage sites (e.g. castles and abbeys) are not among your preferred places to visit?" (Prompted)



Not easy enough to get to for a day out

- 6.6 This is a particularly frequent answer among over 65s (47%) and residents of mid Wales (39%).

6.7 There are several meanings to this answer:

- There are not enough heritage sites within an acceptable 'day out radius' from where the person lives
- Heritage sites are in awkward to reach locations
- As above point, and there is not enough else to do in the area to make a day out – the heritage site is often perceived as not enough on its own to make the journey worthwhile

“Great for about an hour and then not a lot to keep you there”

Male, 55 – 64, couple, Wales

“Even at Cardiff Castle, you wouldn't spend more than a few hours there, but you have the city also. I wouldn't travel to the middle of nowhere just to visit a castle.”

Male, 35 – 44, couple, Wales

“To travel just to go and see one thing, it's not enough. It needs to be linked with other things. If it's an hour, that's not a bother. But if it's an hour to go and see somewhere for 30 minutes and then drive back, it's not enough.”

Male, 45 – 54, couple, Wales

6.8 It depends on the type of site too. A largely intact looking castle holds a different appeal to one that looks like a ruin.

“Whenever I go past Caerphilly Castle, I see it half tumbling down. I don't really want to see a half tumbled down castle.”

Female, 18 – 24, couple, Wales

Only so many times people want to visit the same site

6.9 A common theme coming from the focus groups is that people feel when they've seen a heritage site, there's no desire to go again, at least not within a short space of time. This means that the choice of heritage sites lying within the 'day out radius' of where they live quickly becomes exhausted. However, if they travel to a different part of the UK, they are more likely to visit one.

“I live in north Wales and we've been around the castles – that's why we don't go. We've been and done and got the t-shirt. But if we visited Cardiff then we could make the effort to go [to Cardiff Castle].”

Female, 55 – 64, couple, Wales

“I don't think it's boring at all – I like history – it's just that there are only so many times you can go to these places”

Female, 55 – 64, couple, Wales

“We visited Porthmadog and we went to Harlech Castle because we were on holiday in the area”

Male, 55 – 64, couple, Wales

“I went to Castell Coch and Cardiff Castle a lot when I was younger, so unless there was something on, I’m less inclined to go now.”

Female, 18 – 24, couple, Wales

Sounds boring / no interest in history

6.10 These answers stand out particularly among the youngest age group. 43% of 18-24s say that heritage sites sound boring, and 31% say they have no interest in history.

6.11 Some say that the word ‘heritage’ would make the place sound boring, but a word like ‘castle’ would have more positive connotations.

“The word ‘heritage’ doesn’t evoke excitement, but the word ‘castle’ is good. Kids love castles – they probably like dragons and knights.”

Female, 55 – 64, alone, Wales

Value for money / affordable entry

6.12 Answers on these barriers do not vary significantly by socio-economic group or party type. There is a view across many respondent types that heritage sites may charge more than is considered worth it. The view is similar with or without children.

“If you have to pay, there’s a big question about whether you get value for money for it”

Male, 55 – 64, couple, Wales

6.13 For some, it’s not just about the entry price but also the extras they expect they would end up paying for.

“If we went to Caerphilly Castle you have the entry fee, parking charges, kids always want tat from the gift shop”

Female, 45 – 54, with young children, Wales

Don’t think it’s interesting for children

6.14 This is by far the most frequent answer (45%) given by families with young children. The barrier subsides somewhat when the children become older – 24% of families with older children have answered this.

“As an adult, I wouldn’t mind reading the information, but you can’t expect children to do that. If the attraction is charging all this money, can’t they afford to pay someone to take you round and make it interesting?”

Female, 25 – 34, with young children, Wales

“My four year old can’t read. My older ones can, but they would get bored. They need re-enactment.”

Female, 35 – 44, with young children, Wales

Do the results for Wales differ from the rest of Britain?

- 6.15 The order of answers is very similar, but a couple of barriers differ in their percentages. In Wales, 26% say that heritage sites are not easy enough to get to for a day out. In the rest of Britain, this is 33% (the results for England and Scotland do not differ significantly from each other).

“When I’ve been to ruins, these are more a stop-off on the way to where you’re going as opposed to a day out. Whereas I absolutely loved Cardiff Castle because it’s more structured and you’ve got somewhere to sit and something to do.”

Female, 45 – 54, couple, England

- 6.16 In Wales, 19% say that heritage sites are not value for money. In the rest of Britain, this is 26%.

“Make entry free”

Male, 65+, older children, England

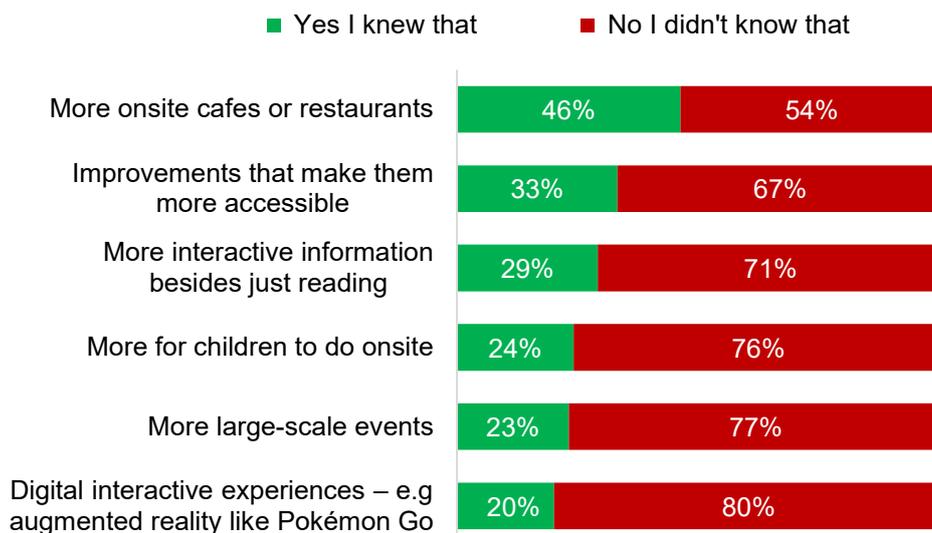
“I would pay £10 for a family. I don’t think there would be much inside.”

Female, 25 – 34, young children, Scotland

7. Encouraging Visits

Awareness of recent developments

Q14 "Are you aware that some heritage sites in Wales have recently undergone / are undergoing the following types of development?"



Base: 832

Some awareness of developments

7.1 Some Wales residents are aware of recent developments at Welsh heritage sites, especially onsite cafes / restaurants. Also accessibility:

"I know Harlech Castle you can get into, but I don't know what it's like once you're inside"

Female, 55 – 64, alone, Wales

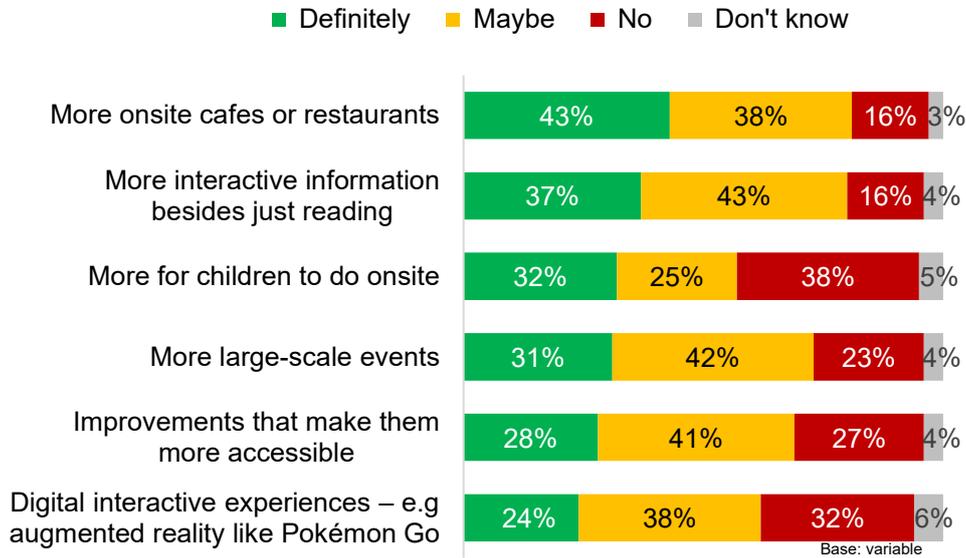
Do the results for Wales differ from the rest of Britain?

7.2 The questions wording used for respondents in England & Scotland was '... heritage sites in the UK ...' rather than 'heritage sites in Wales'.

7.3 The order of awareness of the developments is the same, and the proportions aware of each development do not differ significantly between Wales and the rest of Britain except for 'more onsite cafes or restaurants' (46% aware in Wales; 54% aware in rest of Britain).

Making a difference to likelihood of visiting

Q15 "Would knowing more about these developments make a difference to your likelihood of visiting a heritage site?"



In Q15, respondents have been asked about developments they said they were unaware of in Q14

Scope for Cadw to expand its visitor base

- 7.4 There are numerous ways in which Cadw can attract more visitors to its sites. Some sites have already undergone developments, but non-visitors may or may not be aware.
- 7.5 Having more onsite cafes or restaurants seems to be the most effective development from the above prompted options. Some see this as an essential part of the offering because otherwise they think that there is not enough in a heritage site to make the visit worthwhile. Having somewhere nice to sit and eat & drink significantly increases the 'dwell time' and therefore the perception of whether the visit is worthwhile.

"Once you've seen a castle, you've seen it. There needs to be something else like a good café or good grounds to walk around."

Female, 18 – 24, couple, Wales

Some are wary of cafes in attractions however

7.6 Some parties take their own food & drink on a day out to an attraction because they are wary of the attraction's café being unsuitable for them. Reasons for this include:

- Overpriced
- Overcrowded
- No original / unique food & drink of interest
- Fussy children might not like anything / no children's menu
- Having children around can spoil the otherwise relaxing experience

"I've often found there are long queues in these places, slow service – it puts me off"
Female, 55 – 64, alone, Wales

"They have a monopoly; the prices can be extortionate because they know people will pay for it"
Female, 55 – 64, couple, Wales

"I avoid it because it's just always boring food. I like food trucks with innovative food, not just one organisation."
Female, 55 – 64, group of friends, Wales

"My own experience is you pay £3.50 for a sandwich and then think 'I'll bring my own next time'"
Male, 55 – 64, couple, Wales

"I don't worry about the cost – I see it as part of the experience on holiday"
Male, 45 – 54, couple, Wales

"I can make a nicer picnic to take"
Female, 55 – 64, with older children, Wales

More interactive information – especially for young children

7.7 Having more interactive information besides just reading may help to overcome the perception of boredom, especially for families with young children – around half (49%) of them who are unaware of this development say it would 'definitely' make a difference to their likelihood of visiting a heritage site.

7.8 Many perceive that static information boards are of little or no interest to younger children – even if they could read it, they may well not understand it.

"If it's just [dry] facts, they will find it boring, but if it's acted out with disease, death, battles, funny facts, toilet humour, it makes them giggle"
Female, 45 – 54, with young children, Wales

“We went to the Red Kit Feeding Station in Ceredigion and had presentation boards telling stories about the tin miners and fairies. The kids were 5 and 7 at the time. They loved hearing the miner and Welsh stories and it did capture their imagination.”

Female, 45 – 54, with young children, Wales

7.9 Adults are also keen to see information brought to life.

“I went to Warwick Castle. They had lots of actors positioned around the site. It made you stop and listen for 20 minutes. Bring it to life, so you’re emersed in the experience, not just walking around.”

Male, 55 – 64, couple, Wales

“There must be loads of out of work actors after lockdown – something like that, someone playing a harp, just something interactive”

Female, 55 – 64, group of friends, Wales

More for children to do onsite

7.10 For families, this is a crucial barrier to overcome, especially if the children are young. About two thirds (68%) of families with young children unaware of this development say that more for children to do onsite would ‘definitely’ make a difference to their likelihood of visiting a heritage site. 42% of families with older children say this.

“The children were learning about a battle at school. The re-enactment made it so much fun, with dressing up. I don’t know if they still do that in castles?”

Female, 55 – 64, with older children, Wales

“We went to an attraction that had explorer packs for children and you get crayons and paper. Amelia Trust Farm does something similar – it’s fun for the children to find out clues.”

Female, 45 – 54, with young children, Wales

7.11 Parents often prioritise the needs of their children when deciding where to go on a day out. They won’t risk going somewhere new if they think their children could get bored. This is why some families keep ‘regurgitating’ the same days out – it’s often easier to stick to places they know their children enjoy visiting.

“It’s often easier to stick with familiar places – we know there’s parking there, there’s somewhere to eat, there are toilets”

Female, 35 – 44, with young and older children, Wales

“We don’t mind the same places as the kids can freak out about new places”

Female, 35 – 44, with young children, Wales

- 7.12 Some (14%) respondents who usually go on days out *without* children have also answered that knowing there is more for children to do onsite would ‘definitely’ make a difference to their likelihood of visiting. There seem to be two reasons for this. One is that they might sometimes go out with children or will start doing so in the near future.

“If I go somewhere with a lot of kids, then I would take my nieces”

Female, 35 – 44, alone, Wales

“I would look forward at some stage in the not too distant future to take the grandchildren”

Male, 55 – 64, couple, Wales

- 7.13 The other reason is that the presence of young children can actually put some people off going.

“I try and avoid children. In the height of the holiday season, we won’t go anywhere except the mountains.”

Female, 55 – 64, alone, Wales

“I avoid going places where there are badly behaved children”

Female, 55 – 64, group of friends, Wales

More large-scale events

- 7.14 Events would make a difference to some people. It is one important way of enticing locals to visit because something new is happening, and it overcomes the feeling of not needing to visit the site because they have already seen it. Some say they want to support events in their local community.

“I would turn up to a music event, a craft fair or an art display. Especially in Harlech – I would want to support events going on at the local castle. I personally like rock music but I’m open to other music as well.”

Female, 55 – 64, alone, Wales

- 7.15 Ideas suggested include music, food, art and crafts. They may be prepared to pay a little extra on top of the normal admission price.

“I’m sure a lot of people would bond through food. That would attract a lot of people.”

Female, 18 – 24, couple, Wales

More accessible – especially with young children

7.16 Results in response to this possible development do not vary significantly by age, but it is more likely to make a difference to families with young children (38% have answered ‘definitely’) compared to adult-only groups (24%). Getting around a castle with a pushchair can potentially be as awkward as for an elderly adult with mobility needs.

“There’s no access for prams”
Female, 25 – 34, with older children, Wales

“My mum is 90 and has been diagnosed with dementia so we take her out in a wheelchair. I like to keep her on the flat. There is no way I would ever take her to a castle.”

Female, 55 – 64, couple, Wales

“I recently had spinal surgery so I need to know whether there are enough places for me to sit – it’s not something you can easily look up on the website”

Female, 35 – 44, with young and older children, Wales

Do the results for Wales differ from the rest of Britain?

7.17 The order of results to Q15 is the same, but some results differ in the percentage answering ‘definitely’:

- Onsite cafes or restaurants (43% in Wales vs 34% in rest of Britain)
- Interactive information besides just reading (37% in Wales vs 31% in rest of Britain)
- Large-scale events (31% in Wales vs 24% in rest of Britain)

7.18 But in spite of some variation in the quantitative results, the qualitative feedback from outside Wales follows the same key themes of needing more interactive information (especially for children), events and features (e.g. café) that would make a trip to a heritage site worth the journey and the entry fee.

“You go look at stone circles and think, ‘I’ve seen it – what do I do now?!”
Male, 25 – 34, couple, England

“Heritage sites for children would be too much like school. Our nearest heritage site is the Tower of London. It needs more interaction for children, like a guillotine, put the parents in jail – kids would love that. Live action – ‘this is what people used to do in this castle at that time, like chop people’s heads off”

Female, 35 – 44, older children, England

“If it was educational and interactive, like with headsets, then it would make it more interesting than just reading a card”

Male, 55 – 64, couple, England

“At Cardiff Castle, the stories brought it to life and made me fall in love with some of the rooms – made it more relatable. If it’s literally just ruins, it needs to part of something else like gardens where you can walk. Because if it’s just ruins and one board, I can’t stand and look at that all day.”

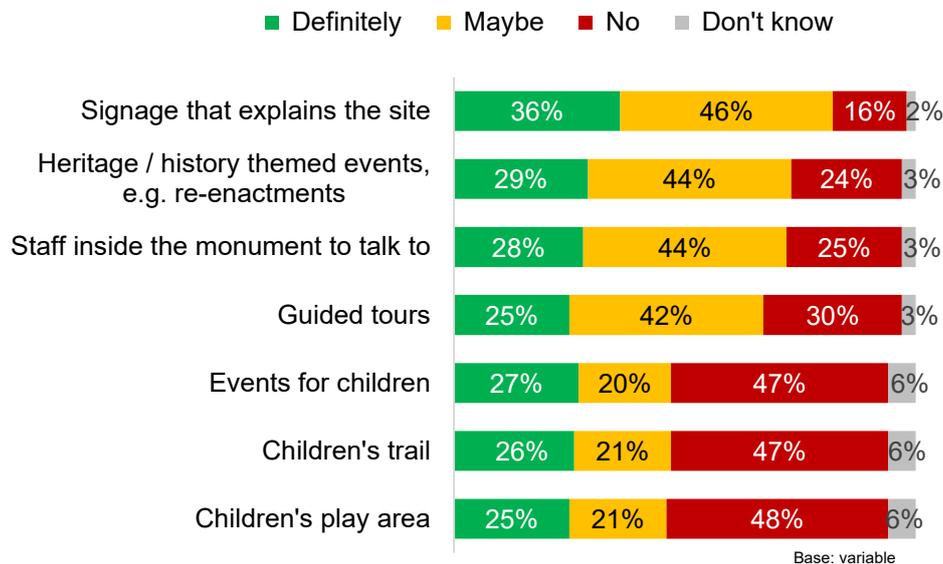
Female, 45 – 54, couple, England

“If you find a nice café with big windows where you can be looking out at something, you can spend a long time there. Good scones and tea tells me I’m on a day out.”

Female, 55 – 64, couple, Scotland

Further developments

Q16 "And would any of the following make a difference to your likelihood of visiting a heritage site?"



The last three statements relating to children have not been asked to those answering ‘no’ or ‘don’t know’ to ‘more for children to do onsite’ in Q15. We have brought forward those answers to Q15 into the results for Q16.

Further scope for Cadw to attract new visitors

7.19 Further ideas for development could also encourage more infrequent and non-visitors to come to heritage sites.

“It’s the flavour you get from the people who work there. I was talking to someone who flew an RAF bomber – he really brought it to life.”

Male, 45 – 54, couple, Wales

7.20 Events, trails and play areas for children do not rank highly overall as the results are ‘diluted’ among the full population, but among families with young children,

these could all make a big difference. Around two thirds of this cohort would 'definitely' have a change in likelihood of visiting for each of these three ideas.

“The St Fagans Easter trail is good and you get eggs at the end as a prize. It engages the kids – they love puzzles.”

Female, 45 – 54, with young children, Wales

“Geocaching is great. Adapt the idea for children at heritage sites.”

Female, 25 – 34, with older children, Wales

Do the results for Wales differ from the rest of Britain?

7.21 No – the findings for Wales are consistent with the findings for the rest of Britain.

“There’s a football museum in Manchester where kids can take penalties, interact. Younger kids especially – they don’t just want to look at pictures as they don’t understand what it’s about.”

Male, 55 – 64, older children, England

“At the Jorvik Viking Centre in York, they burn the boat in the river like the Vikings ... it’s very interactive”

Male, 65+, older children, England

8. Reactions to Visual Stimulus

Reactions to various stimulus material were gauged in the focus groups. The first set of images shows recent developments or plans at Cadw sites in accessibility, café, interactive information and activities for children. This is followed by a membership poster and a Saint David's Day promotional video.

Feedback discussed is from Wales residents unless stated otherwise. Reactions from residents outside Wales are consistent with this throughout.

Accessible bridge at Harlech Castle



Good to see the accessible entrance – although is the inside also accessible?

8.1 Focus group participants have reacted warmly to this image. It shows good accessibility into the castle for those with a mobility disability and also families with pushchairs. Some would not have expected to see this at a castle.

“In hindsight, that would have been great when the boys were in a pushchair”
Female, 35 – 44, with young and older children, Wales

8.2 However, some question whether the inside is also accessible.

“It would be great for me now but it makes me wonder what it would be like inside”
Female, 35 – 44, with young and older children, Wales

Fun for children to run across

8.3 Some say that as well as offering good access into the castle, the bridge also offers a fun place for children to run across.

“Kids would love to run over that”
Female, 45 – 54, with young children, Wales

Accessibility ramp at Tintern Abbey



Also well received

- 8.4 This accessibility ramp has also generally gone down well with participants. It could make a big difference to the experience of the less mobile visitors and families with pushchairs.

“If you have somebody in a wheelchair or pram, it makes life an awful lot easier”
Male, 55 – 64, couple, Wales

“That would help me a lot. It’s good that there are handles to grab hold of.”
Female, 35 – 44, with young and older children, Wales

“I think heritage sites are of interest to older people, so anything which makes them more accessible is a big plus”
Female, 18 – 24, couple, Wales

Promote the accessibility

- 8.5 Some stress that this accessibility feature should be promoted because it goes against what they would expect to find at a heritage site.

“It should say in advertising that it has disabled access. Then you wouldn’t have to chase for that information.”
Female, 55 – 64, alone, Wales

Some don’t like the metal

- 8.6 Some prefer the previous image at Harlech because it blends in better, whereas the metal here could be an eyesore. It could also be slippery and not good for heels.

“It looks very ‘metally’ – the other one looks more flowing with the castle”
Female, 25 – 34, with older children, Wales

Artist's impression of accessibility



Mixed views on this one

- 8.7 Whilst people generally welcome ideas for improved accessibility, some feel this concept goes too far and harms the authenticity of the original castle.
- 8.8 If the lift is part of an 'add-on' structure to the original castle and/or is discreetly inside then it is more likely to be accepted. But if it is too visible from the outside and too much a part of the original castle, views lean towards the harm to the authenticity outweighing the accessibility benefit.

"If I knew there was something like that available, I would be more inclined to visit, although it takes away the authenticity of the castle. I would never have expected that was possible. I just assume castles have steep spiral staircases and are difficult to get around."

Female, 35 – 44, with young and older children, Wales

"I can't imagine having a lift in a castle – it doesn't seem right to do that to it"

Female, 55 – 64, alone, Wales

"I think it ruins the historical value"

Female, 55 – 64, couple, Wales

"Something like this would have been good for my elderly mother visiting"

Female, 45 – 54, with young children, Wales

Information board at Caernarfon Castle



Generally liked for adults – brings the information to life

- 8.9 When thinking about adults reading this, the display is generally liked. The chess-board style image and use of colour make the information more interesting to stop and read.

“That’s the sort of thing that I like – it would make me read it”

Male, 55 – 64, couple, Wales

“It brings it to life”

Female, 55 – 64, group of friends, Wales

But probably not interesting for children

- 8.10 However, when thinking about children looking at this, the general view is that it would not be interesting enough. In spite of the images, the information is still static rather than interactive where they could touch things and get a response.

“I think digital would be a lot better – more interesting for children”

Female, 35 – 44, alone, Wales

“Children like to press things, or move some of the figures around to reveal an answer”

Female, 55 – 64, with older children, Wales

“Add a speaker and a touch button for the kids to press and it reads it out”

Female, 25 – 34, with older children, Wales

Faces at Caernarfon Castle



Some like the faces

- 8.11 Some like this display with the faces – it intrigues them and makes them want to stop and read in a room that they would otherwise spend little time in.

“It intrigues me now as to why the faces are there. I would want to read and find out.”

Male, 45 – 54, couple, Wales

“It would grab my children’s attention – interesting shapes, pictures, they would want to learn about it”

Female, 35 – 44, with young and older children, Wales

“It’s good when some imagination has gone into the display. If it’s all flat boards then it becomes a bit samey.”

Male, 35 – 44, with young children, Wales

Others are less enthused

- 8.12 Some are less keen on this display. Whilst effort has gone into making the information visually appealing, the amount of text is still too much for some. There are also questions over whether the display is in the most appropriate room as it looks too small for this.

“Too much writing”

Female, 25 – 34, with older children, Wales

“I would read these but my children wouldn’t”

Female, 45 – 54, with young children, Wales

“It looks a bit wordy; it’s a small space. If there are a lot of people, they aren’t going to bother reading it.”

Female, 55 – 64, alone, Wales

Café at Harlech Castle



Really good choice of location

- 8.13 This image of the new café at Harlech Castle has gone down very well. People like that it's outside the castle, so they would enjoy views of the castle as a whole, as well as the attractive surroundings.

"I like the fact you can sit there and see what you've gone to have a look at"
Male, 45 – 54, couple, Wales

"It's interesting that you can see the whole castle while having your cup of tea"
Female, 18 – 24, couple, Wales

"You can see the mountains from there"
Female, 55 – 64, alone, Wales

"Having the café outside preserves the castle for what it is"
Female, 18 – 24, couple, Wales

Only improvement would be something to occupy children

- 8.14 Parents would appreciate their children being meaningfully occupied while they try to enjoy their café experience.

"I would need a playground to the side for the kids"
Female, 45 – 54, with young children, Wales

Very well received by participants outside of Wales too

- 8.15 Reactions outside of Wales are consistent with the above points.

"I would sit there for ages. It's better than shoehorning a café into the building and disrupting the space ... you get to look at the castle and see how it fits within the landscape – well worth visiting"

Female, 55 – 64, couple, Scotland

Event at Blaenavon



Attractive idea

8.16 From the image, this type of event looks like it would appeal to many. The idea of watching some sort of show outdoors at the right time of year is attractive, and the lighting adds to the experience.

“It would be nice to watch a play outdoors”

Female, 55 – 64, alone, Wales

Mixed views on the headsets

8.17 Some like the idea of wearing a headset which could allow them to tune in or out as they please. Others may find it a little isolating.

“It looks like a concert going on through the headsets. Good option to tune in or tune out.”

Male, 35 – 44, with young children, Wales

“I think the headphones isolate you from the people around you”

Female, 55 – 64, alone, Wales

Building blocks at Beaumaris Castle



Good fun for children

- 8.18 This is the type of activity that parents would like to see more of for children at heritage sites – as long as they don't fight over it.
- 8.19 Some suggest that it could be made more fun by having competitions like who can build it in the fastest time or have teams which compete against each other.

"My boys would have a good go at that"
Female, 35 – 44, with young and older children, Wales

"I think children would be there all day making that"
Female, 55 – 64, couple, Wales

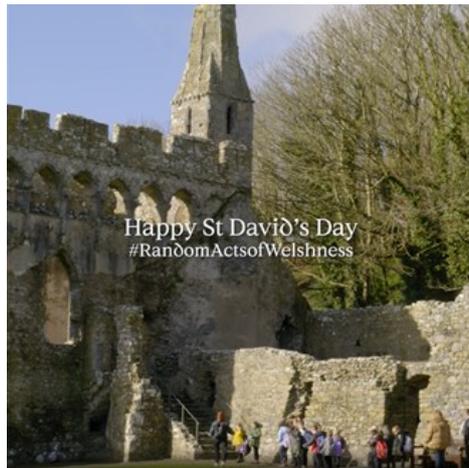
"Have two teams who go against each other"
Female, 55 – 64, alone, Wales

The grown-ups might join in too

- 8.20 Some adults would not be able to resist the fun also.

"Get the kids out of the way!"
Female, 55 – 64, alone, Wales

Saint David's Day promotional video



Final scene from the video

Warmly received

8.21 The Saint David's Day promotional video has gone down very well. Viewers have described it as 'cute'. It evokes childhood memories of Saint David's Day. It also shows how a heritage site can be made interesting for children.

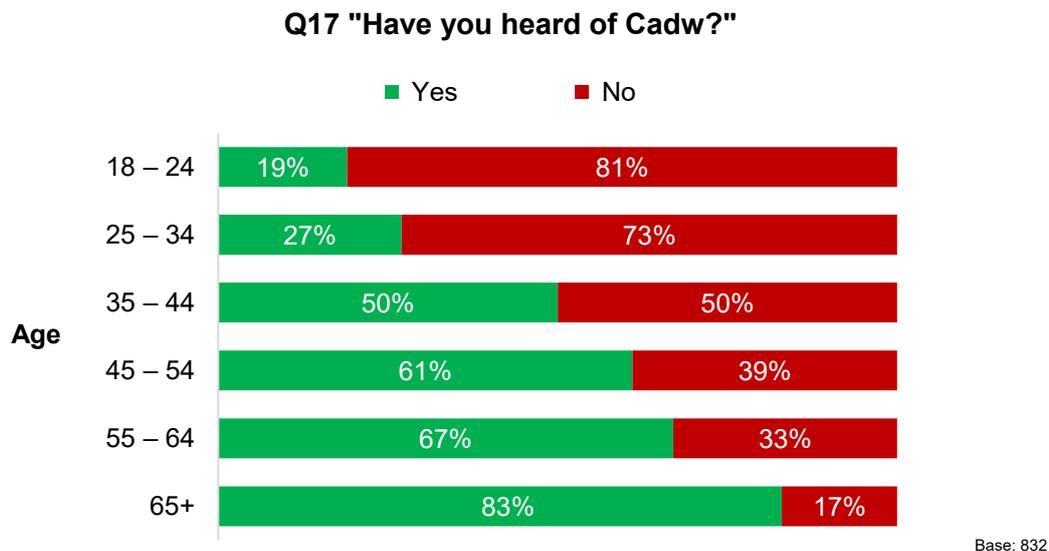
"It reminds me of a Saint David's school project. It's cute."
Female, 45 – 54, with young children, Wales

"I like the 'Random Acts of Welshness' – a nice tagline rather than the standard people going along with a map"
Female, 45 – 54, with young children, Wales

"I think if there's someone or something visually there to educate them and it makes it more interesting with facts they can understand, I would definitely take my own children"
Female, 35 – 44, with young and older children, Wales

"It's very cute"
Female, 18 – 24, couple, Wales

9. Awareness of Cadw



Awareness correlates very significantly with age

- 9.1 Overall awareness / non-awareness of Cadw is split 50/50. This correlates greatly with age, shown on the above chart. Past the age of 45, the population of infrequent / non-visitors becomes more aware than not aware.
- 9.2 As well as older people being more likely to be aware, awareness is also significantly higher among:
- Men (58%) compared to women (44%)
 - ABC1s (55%) compared to C2DEs (44%)

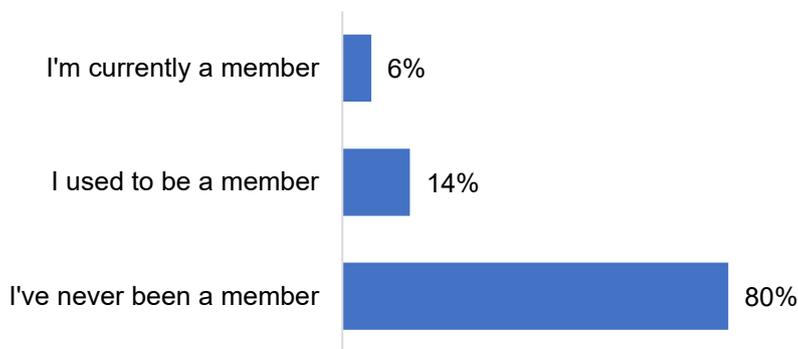
Wider question for rest of Britain

- 9.3 Respondents in England & Scotland have been asked their awareness of English Heritage and Historic Environment Scotland, as well as Cadw. Overall awareness levels are:
- English Heritage: 83% in England / 54% in Scotland
 - Historic Environment Scotland: 55% in Scotland / 18% in England
 - Cadw: 11% in England / 7% in Scotland
- 9.4 In England, awareness of English Heritage starts at 60% with 18-24s and increases with age to 98% among over 65s.

- 9.5 In Scotland, awareness of Historic Environment Scotland does not vary significantly with age – it was only founded in 2015, although succeeded the similarly named ‘Historic Scotland’.
- 9.6 In England, awareness of Cadw goes against the grain of increased awareness with age. 14% of under 45s in England are aware of Cadw, compared to 8% of over 45s.

Membership of National Trust

Q18 "Are you or have you ever been a member of the National Trust?"



Base: 832

Most have never been National Trust members

- 9.7 Respondents by definition do not see heritage sites as a preferred place to visit for a day out, so unsurprisingly most (80%) have never been a National Trust member. We have used Q18 as a filter to Q19, discussed next.

Do the results for Wales differ from the rest of Britain?

- 9.8 No – the findings for Wales are consistent with the findings for the rest of Britain.

10. Implications for Cadw

Most infrequent and non-visitors are not beyond encouragement

10.1 This research could have revealed a flatly uninterested non-visitor population, but that is not the case. Infrequent and non-visitors are more likely to use positive words like 'interesting' and 'informative' to describe expected experiences at heritage sites than words like 'dull' and 'boring'. The barriers to visiting are more complex than simply perceiving that the attraction is not a place they could potentially enjoy.

Cadw is already taking a lot of the right action

10.2 Cadw is already taking some of the main courses of action which could encourage visits from infrequent and non-visitors. The challenges are to resource more similar developments and raise awareness of them.

Cafés and events can encourage repeat visits by locals

10.3 Cafés have been highlighted throughout the research as a key day out need for many, and their presence would increase the likelihood of visits. They are also the most frequently mentioned perceived difference between National Trust sites and Cadw sites. Base: 170

10.4 Cadw needs to overcome the perception that once a heritage site has been seen, there is no strong reason to return, at least not in the near future. Cafés and events have both been discussed as ways of overcoming this one-time visit perception.

10.5 The café at Harlech is particularly liked because it is outside the castle and so offers stunning views. This is important to bear in mind for future café developments – the views can matter as much as the café itself.

Some negative perceptions of cafés to overcome however

10.6 Not everyone chooses to eat in a café at an attraction however because of prior negative perceptions of being overpriced, overcrowded, having unoriginal food or

not being suitable for children, either because of food options or lack of entertainment.

- 10.7 Overcoming these perceptions could make cafés even more effective at attracting visits, as well as offering a stronger revenue stream for Cadw.

Matching the key needs of a day out

- 10.8 The high importance of peace and relaxation on a day out is important to consider when promoting Cadw sites and deciding on developments. The wider grounds of many Cadw sites can offer this.

Bring the information to life

- 10.9 Parents in particular but also some adults without children are keen to see heritage sites brought to life. They don't just want to spend the time reading static information boards, and the children especially don't.
- 10.10 Whilst the improved displays shown at Caernarfon Castle have brought some mixed reactions for specific reasons, the principle of trying to present information in a new and more engaging way is supported.
- 10.11 Further ideas involving people such as actors, musicians, guides and engaged staff have all been mentioned from positive experiences of other heritage sites.

Dressing up as knights and princesses

- 10.12 Families tend to prioritise the needs of their children when deciding where to go for a day out. They won't risk going somewhere new if they think the children might be bored.
- 10.13 The building blocks at Beaumaris Castle are along the right lines and families would like to see more of this type of idea. Experiences of trails and activity packs at other attractions have been mentioned.
- 10.14 Castles have many interesting stories to tell, involving knights, princes, princesses, swords, jails, executions and dragons. When learning medieval history at school,

some children get to dress up and re-enact stories. Some Cadw sites already have re-enactment events too, but this kind of idea is needed more frequently.

Steps and pushchairs

- 10.15 Some people write off castles because they assume it would be too difficult to get a pushchair around, or that all the steps and lack of places to sit would be too much for them or someone in their party.
- 10.16 The accessibility improvements at Harlech Castle and Tintern Abbey can change this perception if known about, and more of these developments would be welcomed at other sites. Care needs to be taken however to blend in the improvements as much as possible so as not to harm the authenticity of the historical site.

Car parking stress

- 10.17 The high importance of parking for a day out needs to be considered. If Cadw can't build a car park at a site, the message of where there is convenient and inexpensive parking nearby needs to come across.