



Cadw Visitor Survey 2013 Project Report

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1. Introduction

Background

- 1.1 Cadw is the historic environment service of the Welsh Government. Its role is to project and maintain the historic environment and heritage sites in Wales. Cadw is responsible for over 100 sites which include historic buildings, ancient monuments, historic parks, gardens and landscapes.
- 1.2 The sites are open to the public and a series of events are held at various sites throughout the year. In 2012/13 there were just over 1.2m visits to Cadw staffed sites.
- 1.3 In 2008, Cadw commissioned a visitor survey at selected staffed sites to find out the profile of visitors and their visitor experience. The 2008 visitor survey served as a benchmark for future projects. This survey was repeated in 2011 and again this year (2013).

Objectives

- 1.4 The objectives of the research were to collect information and measure changes to the visitor profile and visitor experience. The research focused on the following:
 - Visitor profiles
 - Motivations to visit
 - Information sources
 - Visitor satisfaction
 - Attitudes and opinions
 - Value for money
 - Likelihood of returning
 - Potential improvements
 - Health and safety aspects

2. Methodology

Questionnaire design

- 2.1 A questionnaire was agreed in consultation with the Cadw client. It remained largely unchanged from the 2008/2011 questionnaire to ensure consistency and allow comparisons to be made between the years. The questionnaire is given in Appendix A.

Fieldwork management

- 2.2 All fieldwork was conducted between 6 August and 5 October.
- 2.3 The fieldwork schedule was devised to ensure that each site included interviews on weekdays and at weekends. Where applicable, we aimed to conduct interviews on event days and non-event days.

Sampling

- 2.1 A total sample of 2,500 interviews was required. In order to accommodate the requirements of a separate project, 1,400 interviews were concentrated at ten specific sites. The remaining interviews were spread across nineteen of Cadw's other sites.
- 2.2 Target numbers of interviews were set for each site, based on 25 interviews being achieved per day. However it was realised at the outset that the footfall at some sites would be very low. Top-up interviews at some sites were necessary in order to achieve the target set for those sites.
- 2.3 Individuals were randomly selected for interview; no quotas were imposed. This ensured that an accurate profile of visitor characteristics would be obtained. Table 1 overleaf shows the number of interviews achieved at each site. Overall, 2,513 interviews were completed against the target of 2,500. The number of completed interviews at each site is broadly in line with Cadw's visitor figures.

Table 1

Site	Site type	Visitor Figures	%	Number of interviews achieved
Beaumaris	Castle	88,542	7.38%	111
Caerleon	Caerleon	55,880	4.66%	91
Castell Coch	Castle	72,369	6.03%	71
Chepstow	Castle	51,771	4.31%	112
Cilgerran	Castle	17,747	1.48%	110
Dolwyddelan	Castle	4,111	0.34%	11
Kidwelly	Castle	26,465	2.20%	104
Lamphey	Bishop's Palace	4,120	0.34%	12
Laugharne	Castle	11,390	0.95%	34
Oxwich	Castle	6,391	0.53%	16
Plas Mawr	Domestic Building	23,065	1.92%	46
Raglan	Castle	52,064	4.34%	87
Rhuddlan	Castle	19,057	1.59%	40
Rug Chapel	Abbey/ chapel	3,326	0.28%	8
Tintern	Abbey/ chapel	65,948	5.49%	101
Tretower	Castle	14,542	1.21%	66
Valle Crucis	Abbey/ chapel	8,606	0.72%	28
Weobley	Castle	2,585	0.22%	42
White	Castle	9,986	0.83%	10
Blaenavon	Blaenavon	19,850	1.65%	104
Caernarfon	Castle	177,275	14.77%	249
Caerphilly	Castle	119,284	9.94%	196
Carreg Cennen	Castle	17,199	1.43%	107
Conwy	Castle	167,823	13.98%	212
Criccieth	Castle	40,906	3.41%	184
Denbigh	Castle	13,427	1.12%	106
Harlech	Castle	75,674	6.30%	90
St Davids	Bishop's Palace	25,356	2.11%	141
Strata Florida	Abbey/ chapel	5,527	0.46%	24
		1,200,286	100.00%	2513

2.4 Of the 2,513 interviews conducted:

- 78% were at castles, 6% at abbeys / chapels, 6% at bishop's palaces, 4% at Caerleon, 4% at Blaenavon and 2% at domestic building
- 35% were in North Wales, 32% in South East Wales, 12% in Mid Wales and 21% in South West Wales
- 8% were on event days, 92% on non-event days (*sub analysis by event days has not been undertaken because of the low percentage of interviews completed on event days*)

3. Results

Profile of respondents

The profile of visitors is very similar to previous years

- 3.1 The profile of respondents is shown in Table 2 overleaf, together with the corresponding results for 2011 and 2008.

Cadw sites attract more affluent visitors (ABC1 socio economic grading)

- 3.2 Overall, more affluent respondents visit Cadw sites with respondents falling into socio economic grading AB and C1 (39% and 33% respectively). There are slightly more respondents who fall into AB in 2013 compared to the 2011 survey. However it is very close to the 2008 results.

The vast majority of visitors were of white ethnic origin

- 3.3 The vast majority (97%) described themselves as white ethnic origin.

The majority of visitors live in the UK and a quarter live in Wales

- 3.4 The majority of visitors live in the UK (85%), of these visitors a quarter live in Wales and 60% live elsewhere in the UK. 16% were overseas respondents.

Those over 25 years old tend to visit Cadw sites

- 3.5 Similarly to previous years, very few respondents aged 16 to 24 years old are visiting Cadw sites. The profile of respondents tends to be biased towards older visitors.

The majority of visitors did not have any Welsh language skills

- 3.6 All respondents were given the opportunity to undertake the survey in either English or Welsh. Despite 4% of respondents were first language Welsh speakers, only 1% of respondents opted to undertake the survey in Welsh. 86% of respondents did not have any Welsh language skills. This is much higher than in 2011 when 66% of respondents could not speak, understand, read or write in Welsh.

Overseas respondents tend to visit sites in South East Wales

- 3.7 About a fifth (19%) of visitors to South East Wales were overseas visitors; this remains virtually unchanged compared to previous surveys.

Table 2 Characteristics of respondents

Variable / value	% of respondents interviewed		
	2013	2011	2008
Gender			
Male	46%	50%	46%
Female	54%	50%	54%
Age group			
16-19	1%	2%	1%
20-24	3%	3%	4%
25-34	14%	14%	15%
35-44	25%	30%	34%
45-54	21%	23%	21%
55-59	8%	7%	7%
60-64	9%	8%	7%
65+	18%	12%	9%
refused	2%	1%	2%
SEG			
AB	39%	33%	38%
C1	33%	35%	36%
C2	16%	22%	16%
DE	7%	7%	10%
refused	4%	3%	0%
Where resident			
Wales	25%	22%	21%
Other UK	60%	66%	66%
Overseas	16%	15%	13%
Ethnicity			
White - British	50%	54%	56%
White - Welsh	17%	13%	12%
White - English	13%	14%	15%
White - Scottish	1%	1%	1%
White - Irish	1%	1%	1%
Other white	15%	15%	14%
Mixed	<0.3%	<0.5%	<0.5%
Asian / Asian British	<0.7%	1%	1%
Black / Black British	<0.2%	<0.5%	<0.5%
Chinese / other	1.5%	1%	<0.5%

Awareness of Cadw

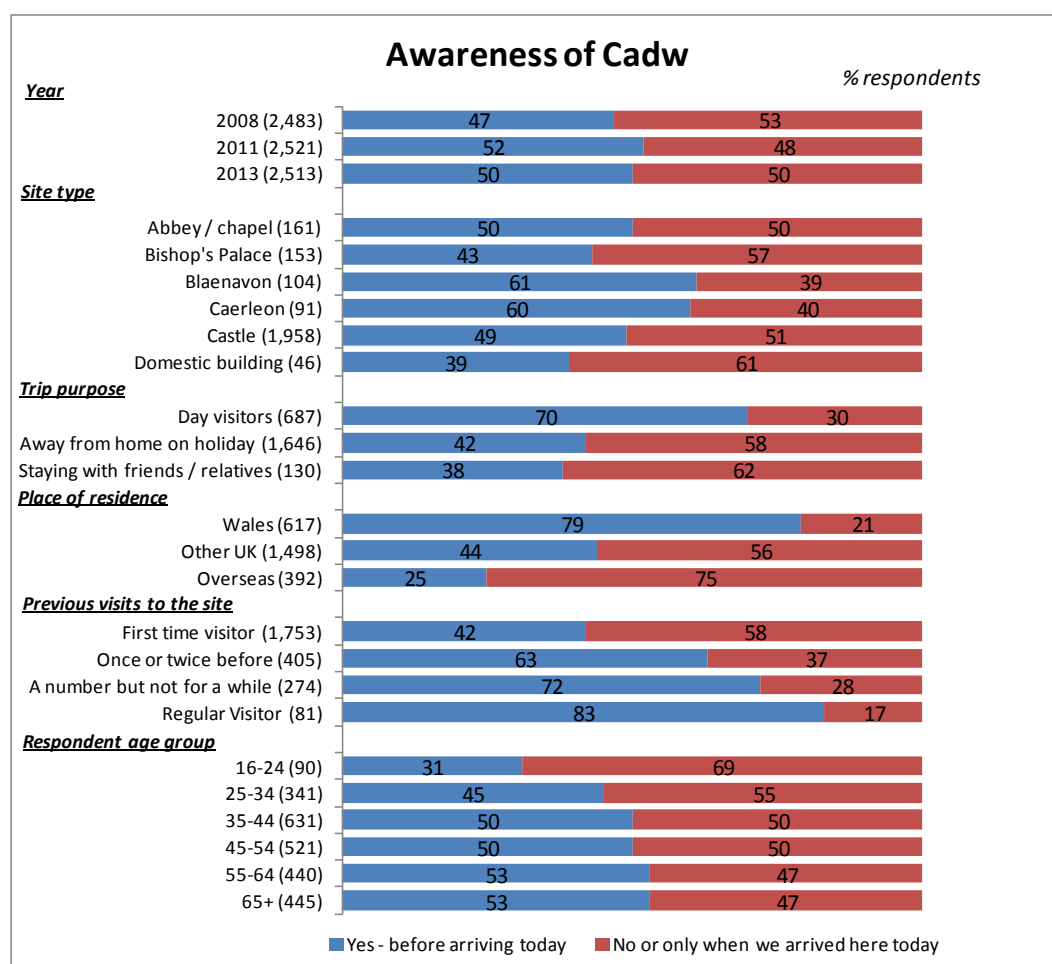
Overall, half of respondents were aware of Cadw

- 3.8 Overall, the awareness of Cadw amongst visitors is very similar to previous years. Half of respondents were aware of Cadw before arriving the site at that day and the other half either did not know about Cadw or found out when they arrived that day.

Less awareness of Cadw sites among visitors to sites in North Wales

- 3.9 Similarly to the 2011 survey, visitors to Cadw sites in North Wales has the lowest percentage of respondents who were aware of Cadw at 44%, compared with 49% Mid Wales, 57% in South West Wales and 51% in South East Wales.
- 3.10 Figure 1 below shows these results by site type, purpose of trip, place of residence, previous visits to the site and age group.

Figure 1



Purpose of visit

The majority of visitors were staying away from home on holiday

- 3.11 Overall, almost two thirds respondents (65%) were staying away from home on holiday and just over a quarter of respondents (27%) were on a day visit from home for pleasure. 5% of respondents were staying with friends/ relatives.

More day trips were made to sites in South West Wales

- 3.12 About two fifths of respondents (39%) visiting sites in South West Wales were on a day visit from home for pleasure, compared to 29% in South East, 20% Mid Wales and 19% in North Wales.

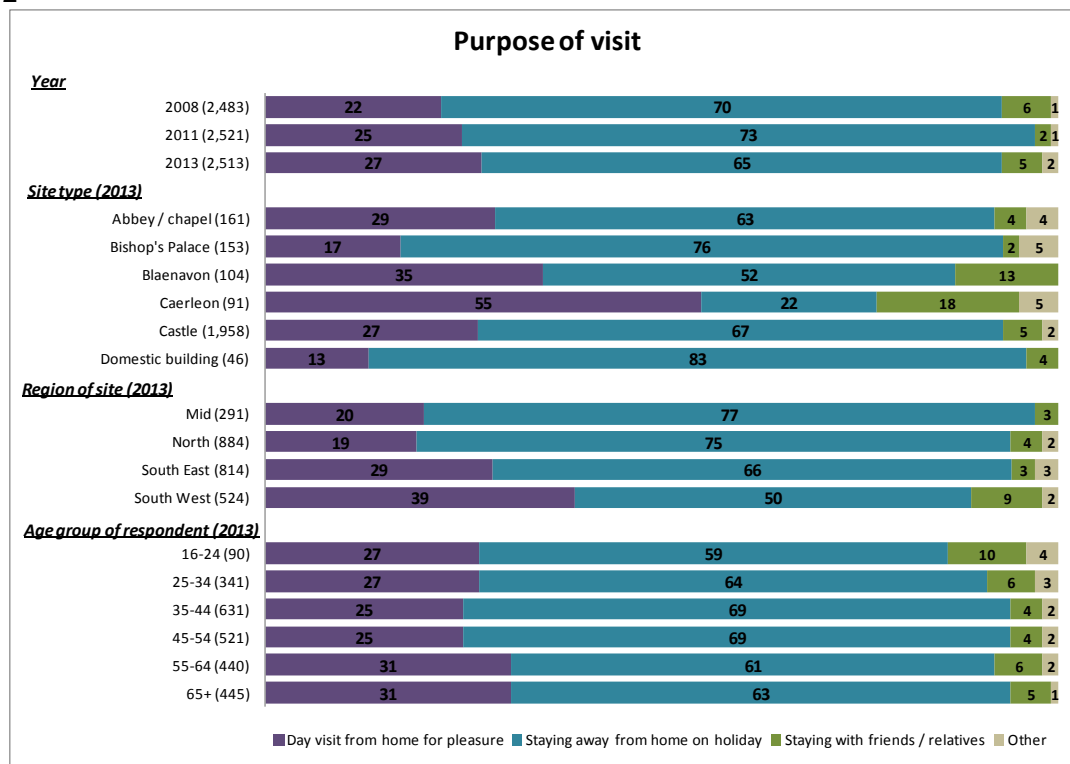
Caerleon was very popular among day trip visitors

- 3.13 Similarly to the 2011 survey, Caerleon attracts the most day visitors compared to other sites (55% in 2013 and 54% in 2011).

The majority of those living in Wales were on a day trip

- 3.14 Three quarters of Welsh residents (75%) were on a day visit compared to 14% of those who lived elsewhere in the UK. These results are identical to the 2011 survey.
- 3.15 Figure 2 below shows the purpose of respondent's visits by site type, region and age group.

Figure 2



Distance travelled

- 3.16 Overall, over a third of respondents (34%) travelled 10 miles or less to get to the site followed by 27% travelling between 11 to 25 miles.

Day visitors were willing to travel further

- 3.17 Respondents on a day trip from home were willing to travel further to the site; 28% had travelled 50 or more miles compared to a fifth of respondents (20%) who had travelled 10 or less miles to the site.

Travelling time

Average time to reach attraction was 44 minutes

- 3.18 The average travel time to reach the attraction was 44 minutes. The average travel times for the different site types are detailed below:

1. Abbey/ chapel (57 minutes)
2. Bishop's Palace (42 minutes)
3. Blaenavon (43 minutes)
4. Caerleon (38 minutes)
5. Castle (44 minutes)
6. Domestic building (36 minutes)

- 3.19 The results have virtually remained unchanged since 2011.

Group type

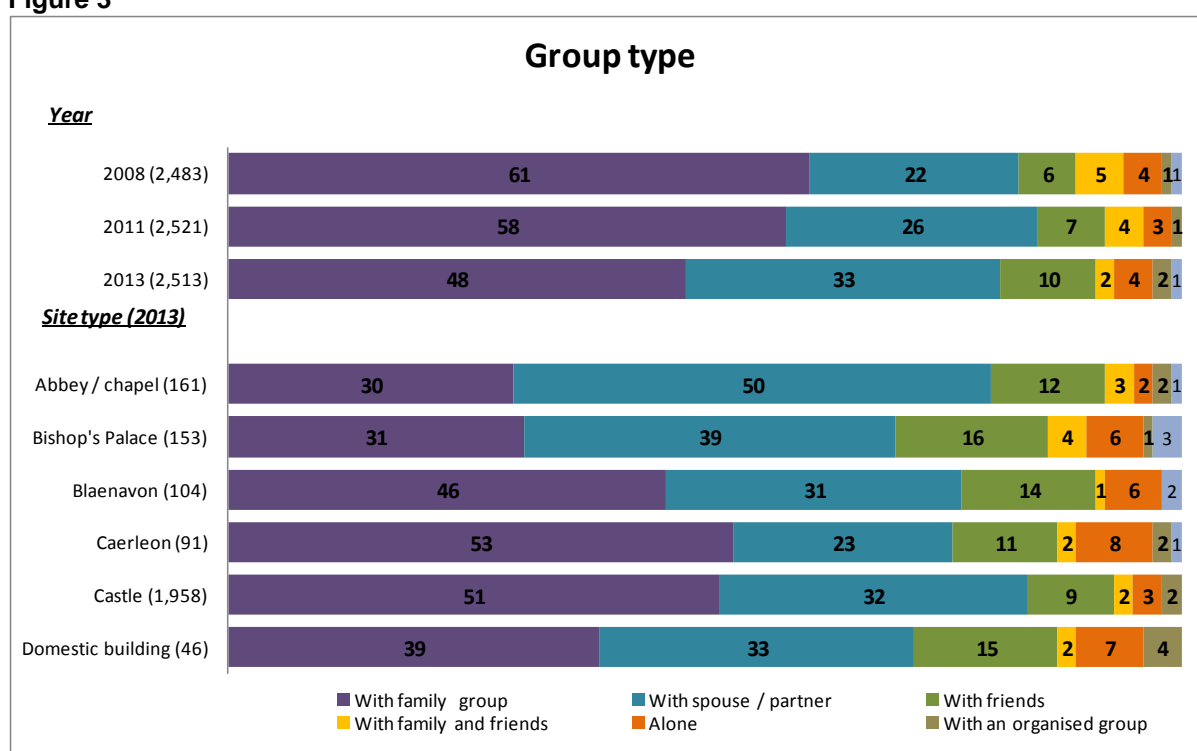
Almost half of respondents were visiting in a family group

- 3.20 Almost half of respondents (48%) said that they were visiting in a family group; this is down by 10% compared to the 2011 survey. A third of respondents (33%) were visiting with their spouse or partner, this is up by 7% compared to 2011. In 2013, there were slightly more friends visiting Cadw sites compared to previous surveys.

Caerleon, Castles and Blaenavon were popular with family groups

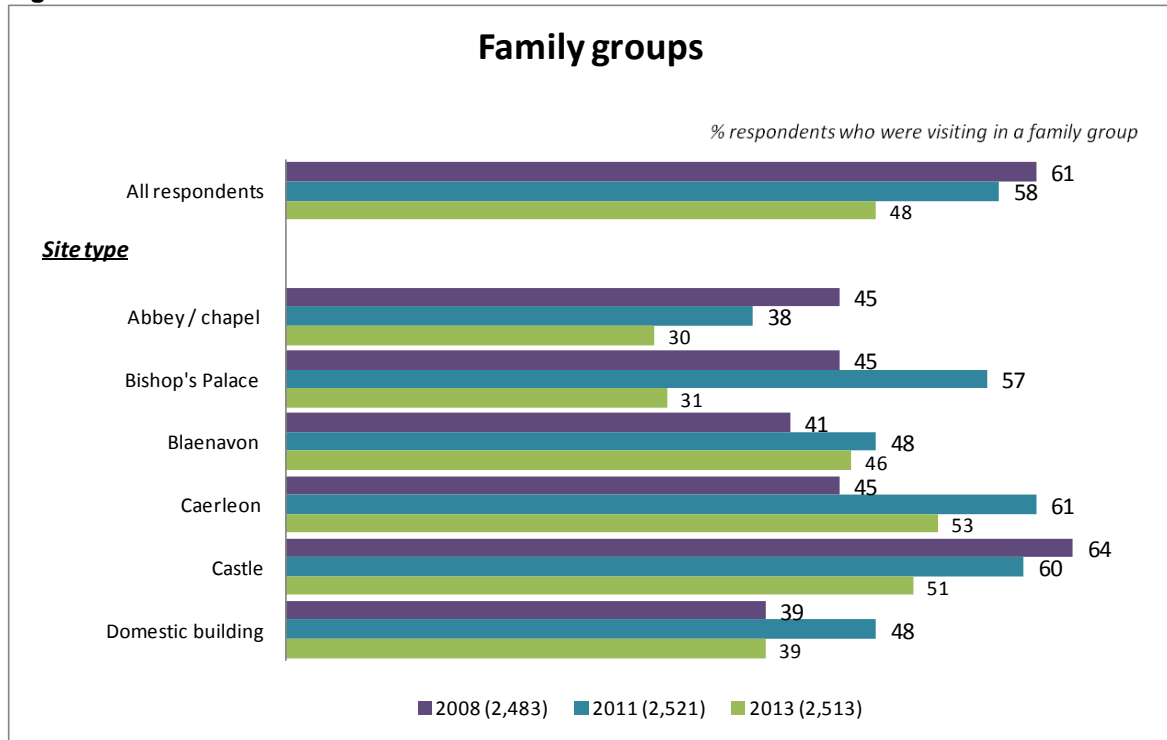
- 3.21 Looking at figure 3 below, it shows that Caerleon, Castles and Blaenavon (site types) were popular with family groups. Abbeys/ chapels were popular with those visiting with their spouse/ partners at 50%.

Figure 3



3.22 Figure 4 focuses specifically on family groups; it shows there were less respondents visiting in a family group compared with the 2011 survey. This is even more obvious when looking at site type where family groups were less compared with the 2011 survey.

Figure 4



Group composition

3.23 Respondents were asked the ages of each person in their group.

Overall, there are fewer children (aged 15 or younger) visiting Cadw sites

3.24 Comparing the results to previous years, there is a downward trend of children aged 15 or younger visiting Cadw sites. There are more respondents aged 45 and over visiting.

Top sites for children were Blaenavon, Castles and Caerleon

3.25 Blaenavon, Castle and Caerleon attracted more children (aged 15 or younger) compared to the other sites (27%, 26% and 22% respectively)

3.26 Blaenavon has increased since 2011 when only 19% of children visited the site.

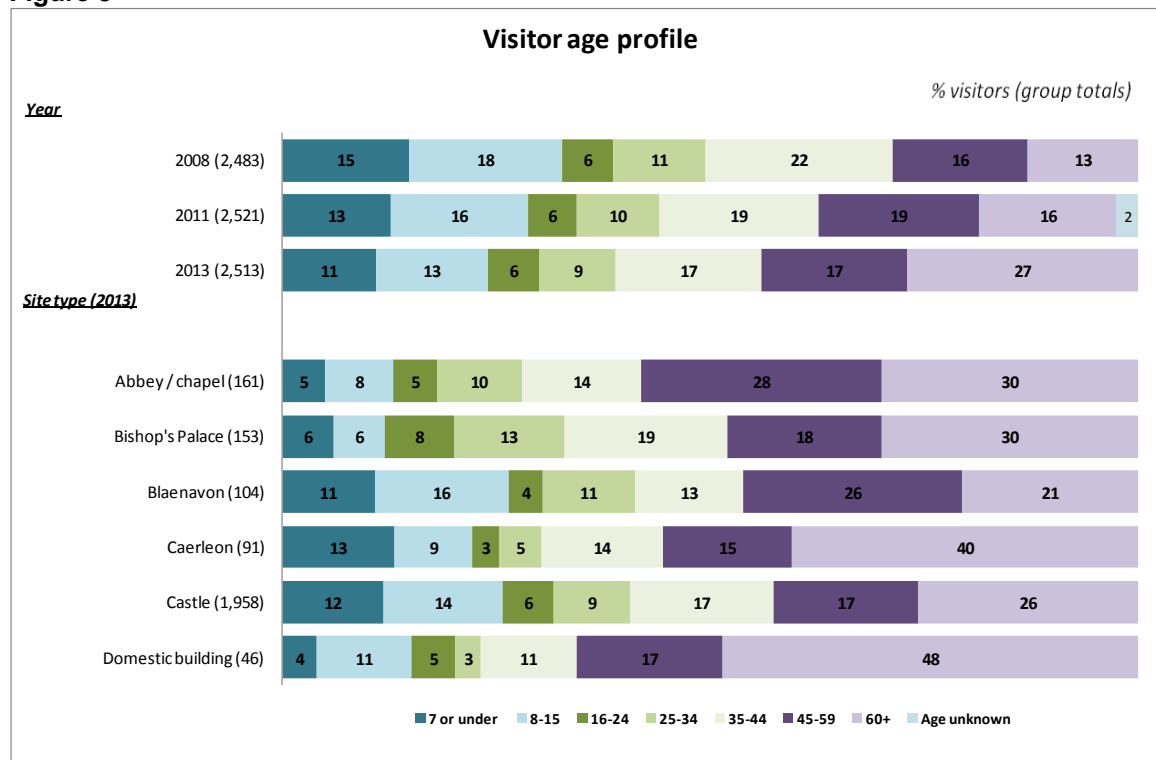
Over two fifth of respondents were aged 45 or over

3.27 44% of visitors were aged 45 or over. Domestic buildings and Abbeys/chapels were popular with this age group.

Only 6% of visitors aged 16-25 visited Cadw sites in 2013, 2011 and 2008

3.28 The results have remained unchanged for those aged 16 - 24. Only 6% of this age group visited Cadw sites.

Figure 5



Previous visits

The majority of respondents were first time visitors

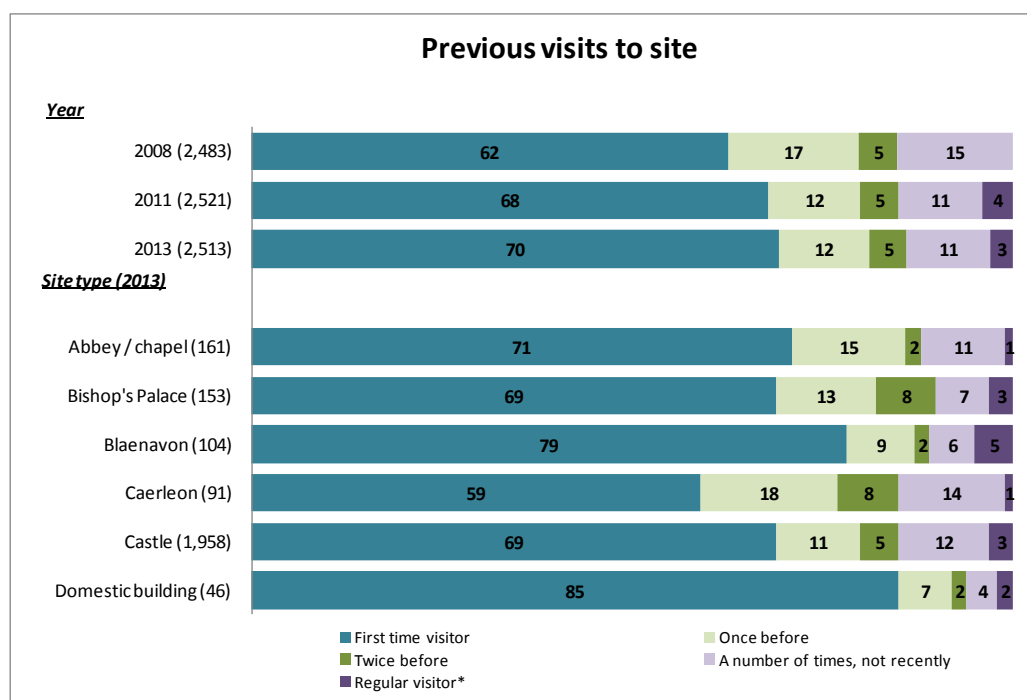
- 3.29 Overall, the majority of respondents were first time visitors (70%), the results remain virtually unchanged since 2011.
- 3.30 The results by site type are also fairly similar to the results in 2011. Domestic building and Blaenavon remains the most popular sites for first time visitors.
- 3.31 Of those on a day trip from home, the majority of respondents were first time visitors at 51%, similarly the majority of those staying away from home on holiday or with friends/ relatives were also first time visitors (77% and 71% respectively). This is detailed in the table below:

Main Purpose for visiting	First time visitors (%)	Repeat visitors (%)
Staying away from home on holiday	77%	23%
Staying with friends/ relatives	71%	29%
Day visit from home for pleasure	51%	49%

Caerleon was popular with repeat visitors

- 3.32 Caerleon is the most popular site for repeat visitors followed closely by Castles and Bishop's Palace (41%, 31% and 31% respectively).

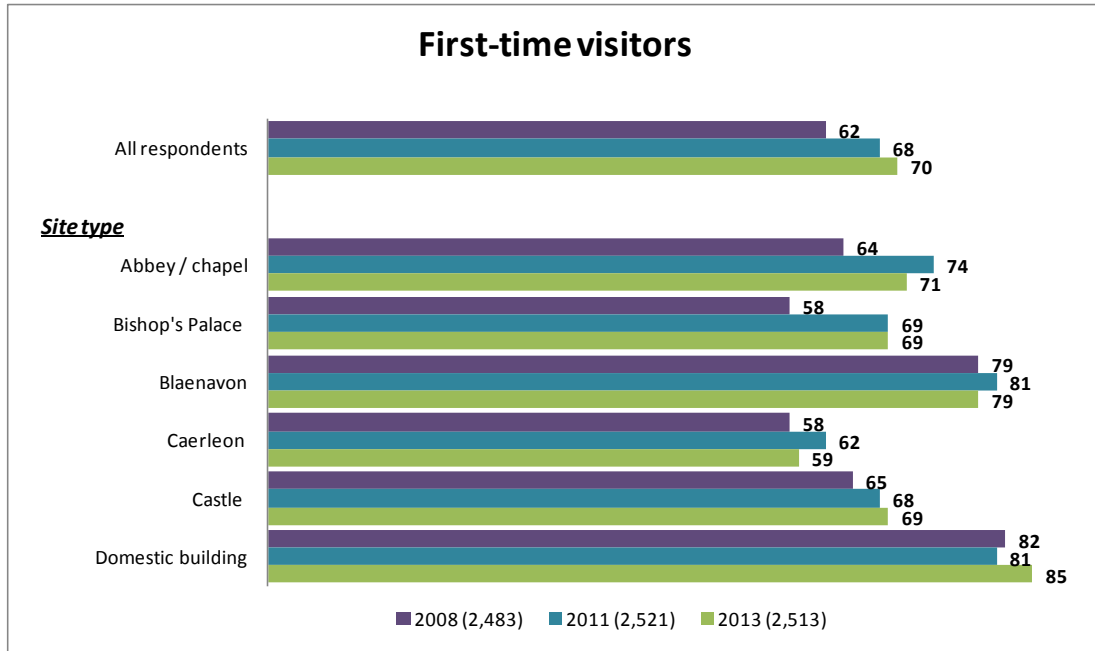
Figure 6



Number of first time visitors has remained consistent since 2011

3.33 As shown in Figure 7, the number of first time visitors has remained fairly similar between 2013 and 2011.

Figure 7



Visitors to other historic attractions

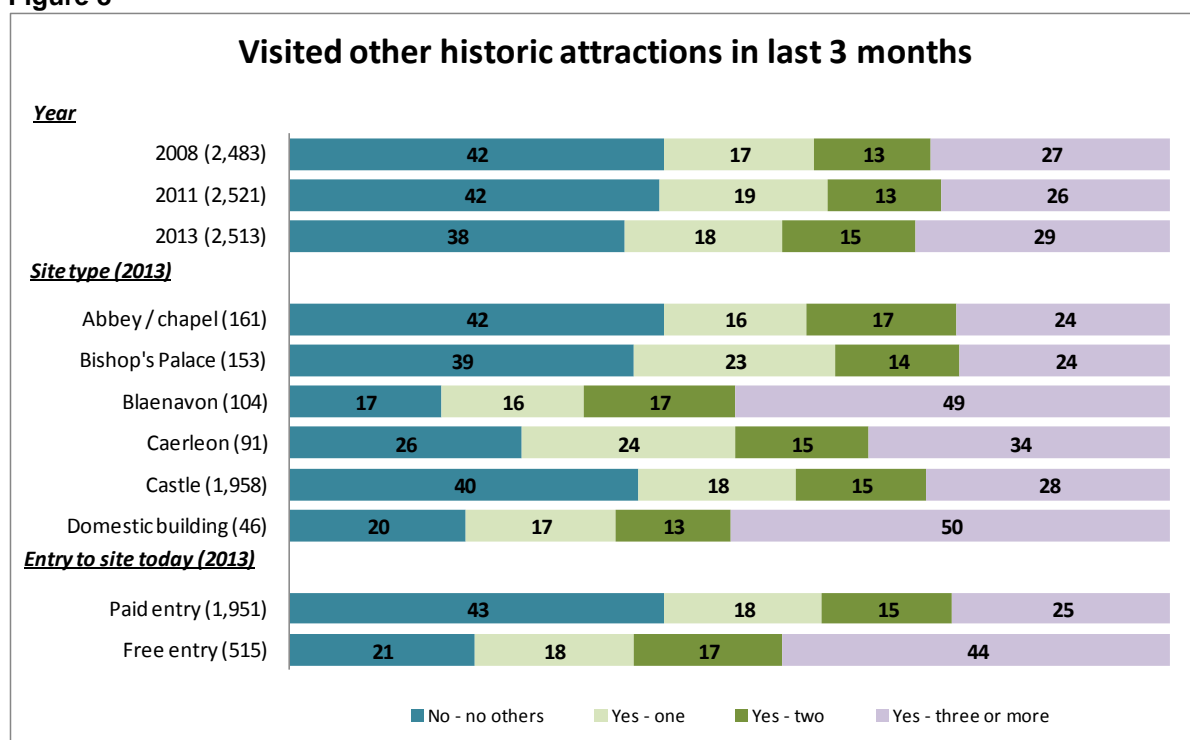
More respondents had visited other historic attractions compared to 2011

- 3.34 Overall, there were more respondents who visited other historic attractions in 2013 compared to previous years. Almost two thirds of respondents (62%) had visited one or more historic attractions in the last 3 months.
- 3.35 Those more likely to be frequent visitors to historic sites were respondents at Blaenavon and Domestic buildings.

Free entry sites attracted those who had visited other historic attractions

- 3.36 Unsurprisingly there were more respondents visiting free entry Cadw sites who had visited other historic attraction(s) in the last 3 months.

Figure 8



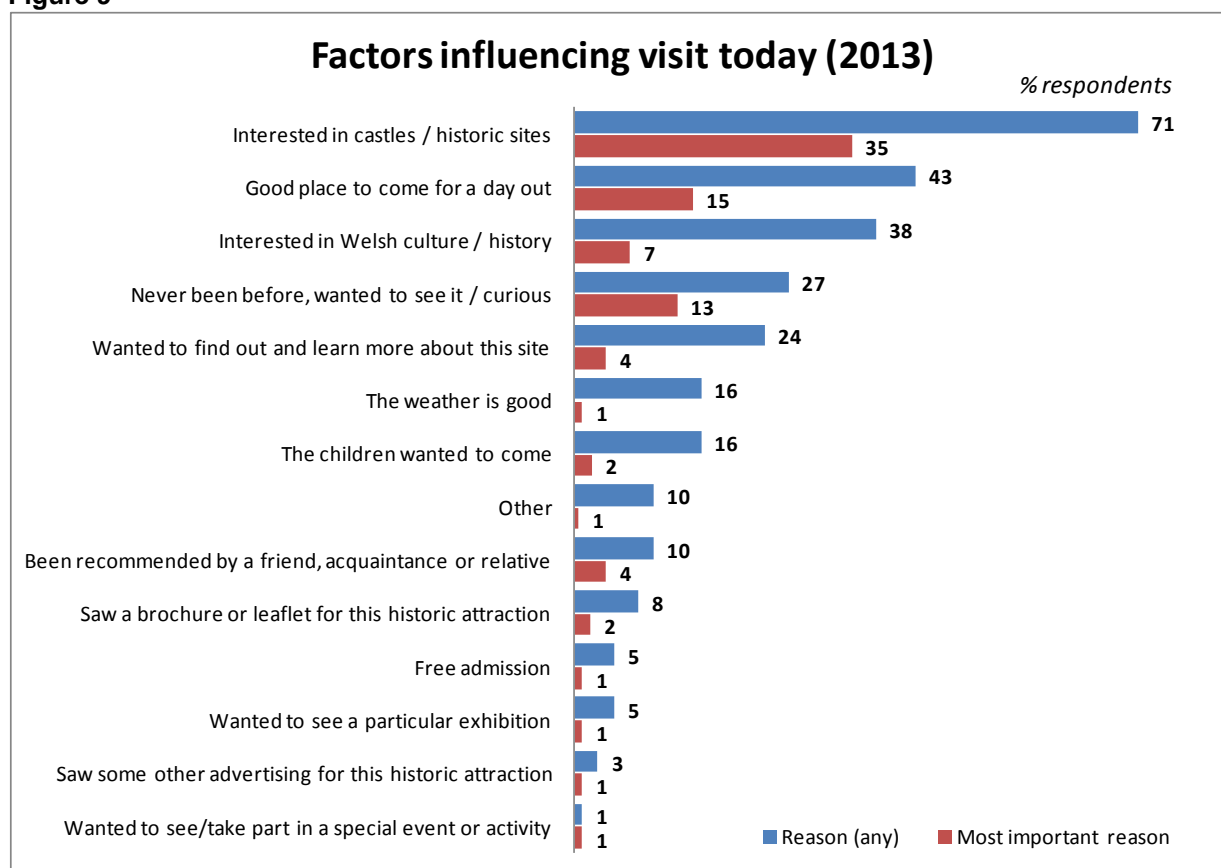
Factors influencing decision to visit

- 3.37 Respondents were shown a list of factors and asked which, if any, had influenced their decision to visit the site on that day.

Interested in castles/ historic sites was the most influencing factor

- 3.38 Figure 9 clearly shows that interest in castles and historic sites was the most influencing factor, followed by 'Good place to come for a day out' and 'Interest in Welsh culture/ history'.

Figure 9



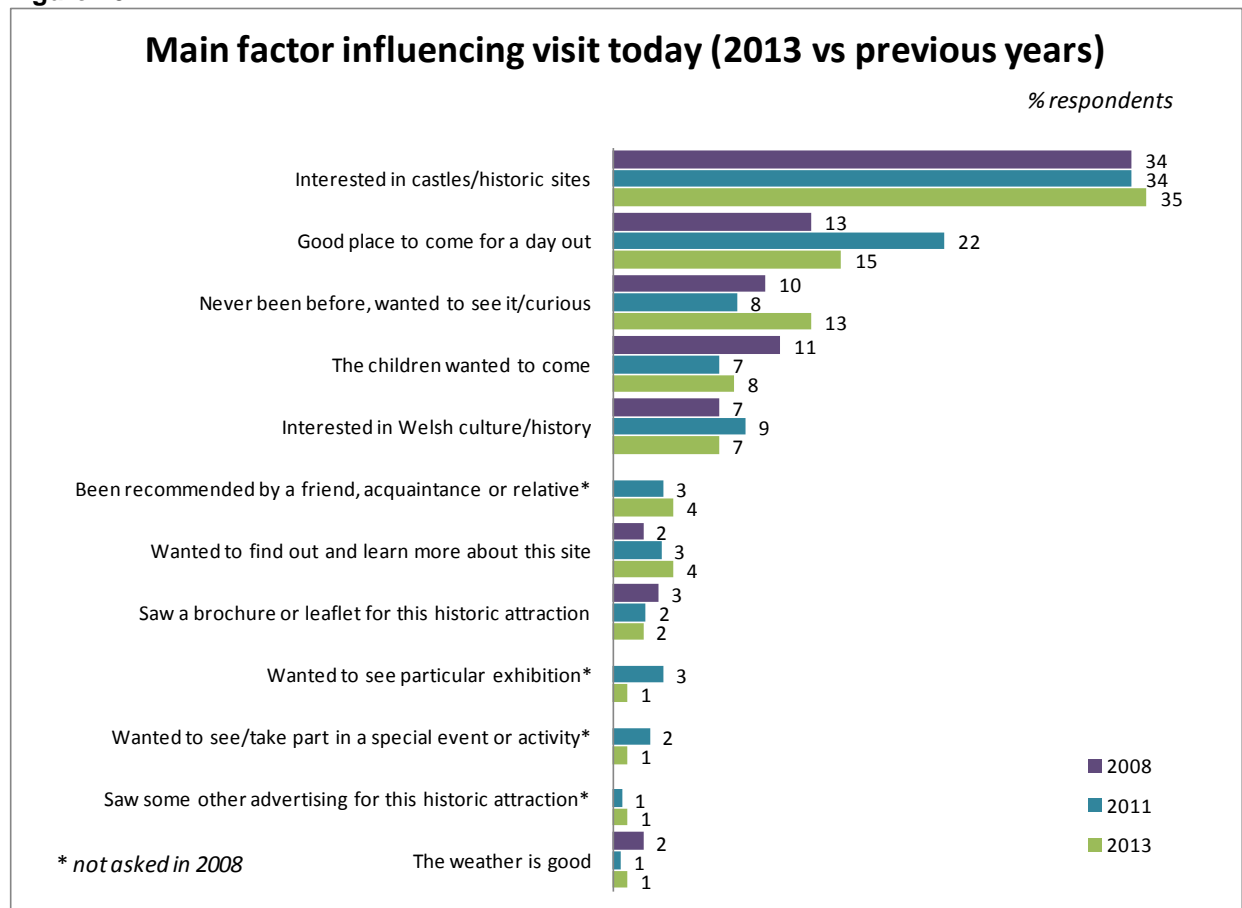
- 3.39 Other unprompted responses mentioned are detailed below (note only responses of 10 mentions or more are listed):

Unprompted responses	# of respondents
Travelled past/ walked past	73
Previous visit/ reminiscing	38
Wanted to bring visiting family/ friends	25
Visiting the area/ visiting friends/ family	13
Organised tour/ included in tour	12

Main factor influencing decision to visit

- 3.40 Respondents were then asked what their most important factor was in their decision to visit.
- 3.41 The **top three main influencing factors** for visiting were:
1. Interested in castles/historic sites (35%)
 2. Good place to come for a day out (15%)
 3. Never been before/ wanted to see it/ curious (13%)
- 3.42 The most popular main reason 'Interested in castles/ historic sites' has largely remained unchanged compared with previous years.
- 3.43 There is a slight increase of 5% in 'Never been before/ wanted to see it/ curious' response compared to 2011.

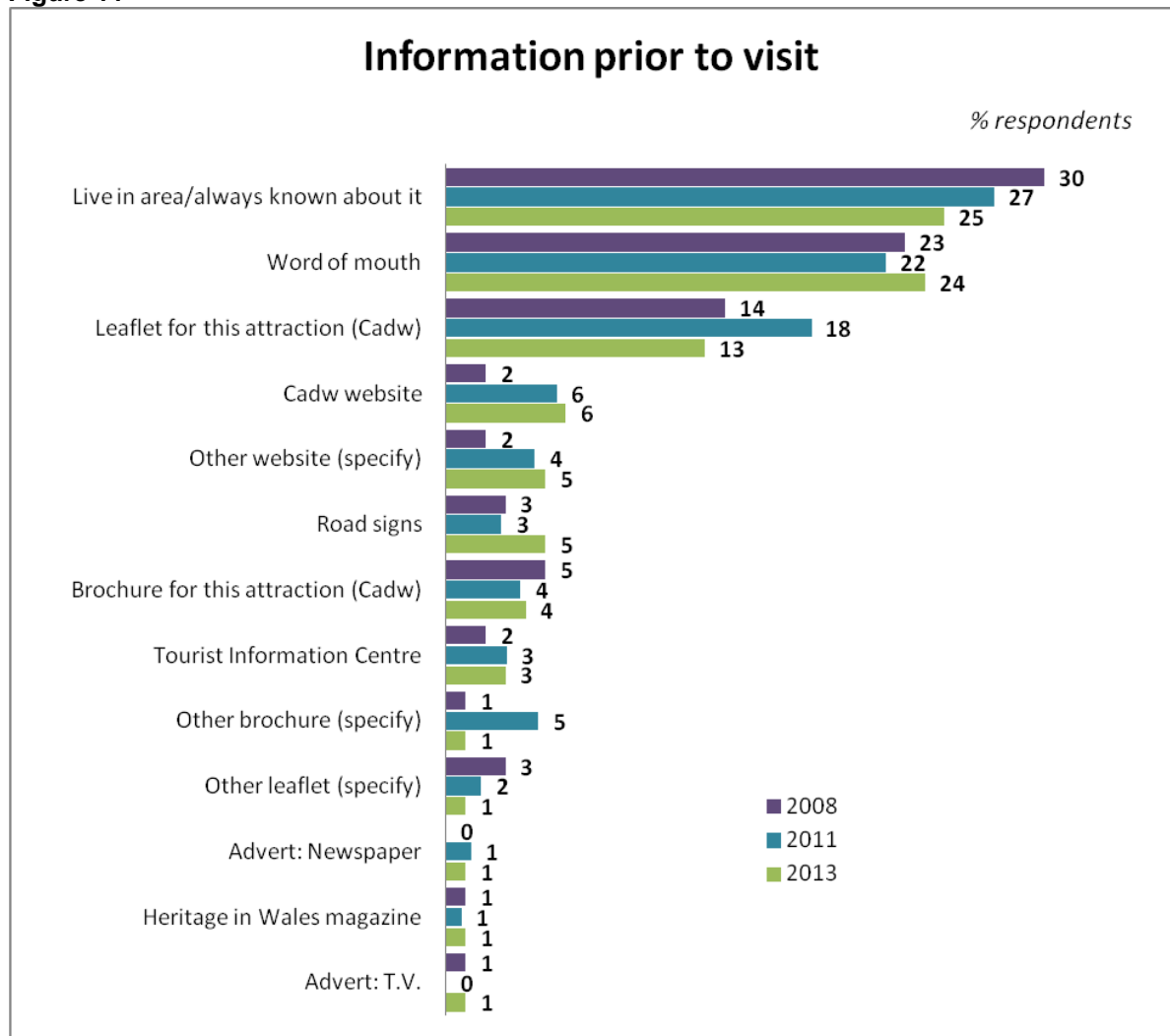
Figure 10



Information prior to the visit

- 3.44 Respondents were asked how they found information about the attraction before their visit that day. Respondents were given a pre-coded list of responses to choose from and they were also given the opportunity to provide another answer if needed.
- 3.45 The **top three responses** have remained the same since 2008:
1. Live in area/ always known about it
 2. Word of mouth
 3. Leaflet for this attraction (Cadw)
- 3.46 6% of respondents selected Cadw website as their source of information prior to visiting, this result has remained the unchanged since 2011.

Figure 11



Cadw leaflets were rated very highly compared to other organisations

- 3.47 In conjunction to this survey, the Visitor Information Needs research project was commissioned by Visit Wales which was also supported and financed by Cadw. This qualitative project highlighted that leaflets are a crucial information source for respondents. Cadw leaflets were the most favoured compared to other leaflets by Natural Resources Wales, National Museum Wales and the National Trust.
- 3.48 Cadw leaflets were more likely to have been used by:
1. Respondents' visiting domestic buildings (22%)
 2. Those staying away from home on holiday (17%)
 3. Those living in the UK (outside Wales) and overseas (15% and 16% respectively)
 4. First time visitors to the site (17%)
- 3.49 Other sources of information used were:

Other responses provided	# of respondents
Saw it/ passed by/ drove passed	113
Previous visit	112
Map	32
Travel guide book	31
Tour guide/ tour company	23
Live locally/ own knowledge/ always known about it	19
Books/ history books	14
Google/ internet search	9
Recommended by hotel/ B&B	9
Friends/ family	8
Cadw membership	7
National Trust members/ guide book	6
Lonely Planet guide	5
English Heritage member/ map/ book	4
Local post office/ local paper	4
Sat Nav - Point of interest	4
Staying locally	4
Cadw App	3
IPhone/ IPad App	2
Wordsworth poem	2

3.50 Other websites used were:

Other responses provided	# of respondents
Google/ search engine	24
Castles Wales	12
Visit Wales	12
Trip Advisor	8
Cadw website	5
Visit Denbigh	4
Local town/ area website	2
North Wales Tourism	2
Rough Guides	2
Wales Tourist Board	2
Abby Farm website	1
Anglesey website	1
Booking.com	1
Caerleon website	1
Conwy website	1
Dr Who	1
Eisteddfod site/ Visit Denbigh	1
Erwbarfe Farm	1
Hotel Website	1
IPad National Trust App	1
Lonely Planet website	1
Map	1
Pembrokeshire website	1
Pontins Website	1
Prestatyn website	1
Private individual's site	1
Tourist website	1
Unesco	1
Visit Cardiff	1
Welsh Heritage	1
Wikipedia	1

3.51 Those who had used a leaflet or brochure prior to their visit were asked where they had found it. A total of 469 respondents had used leaflets/brochures.

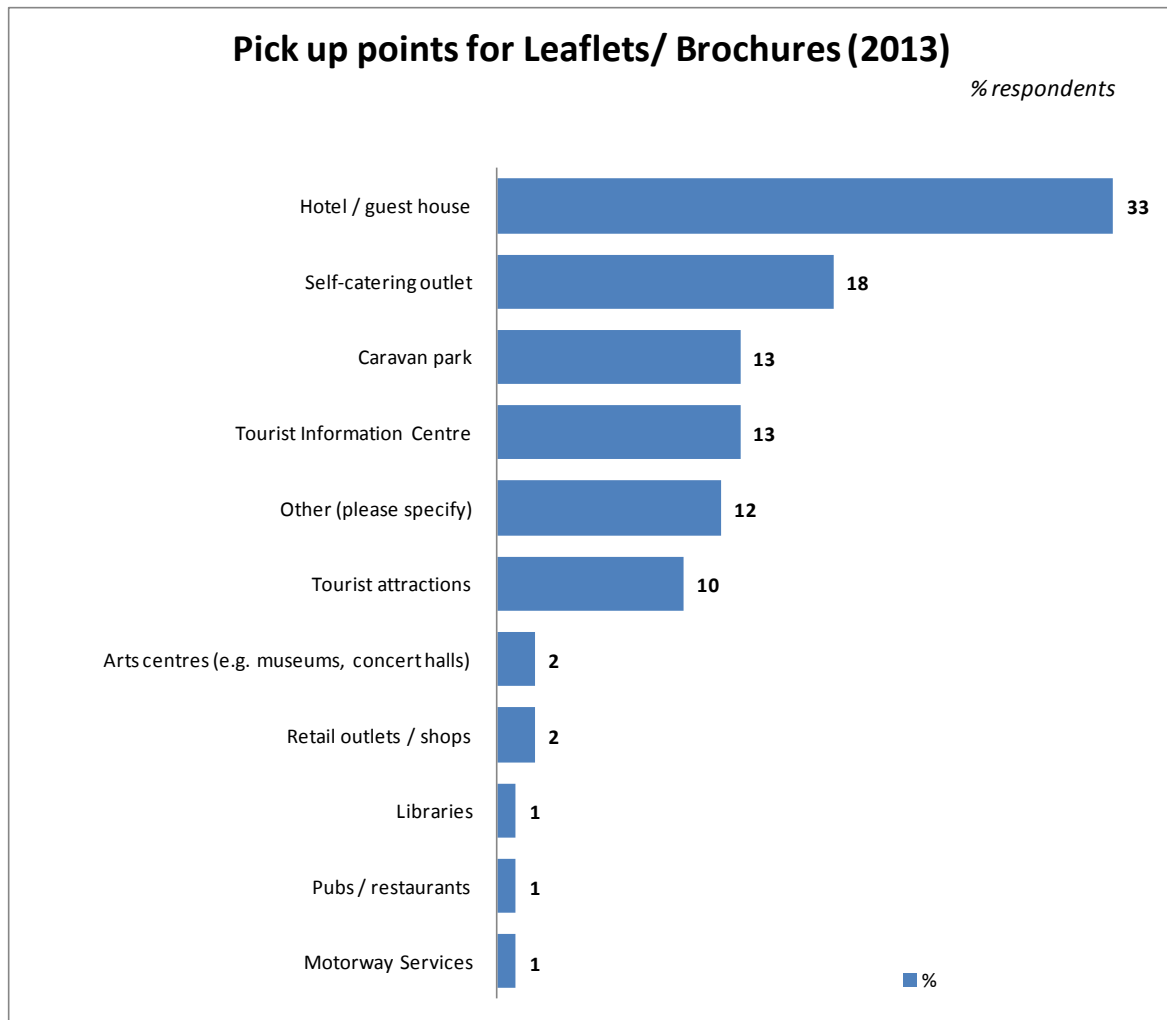
The majority of leaflets were found in accommodation establishments

3.52 As shown in figure 12, accommodation was the most frequent answer provided with 64% respondents. This is broken down by:

1. Hotel / guest house (33%)
2. Self catering (18%)
3. Caravan Park (13%)

3.53 The Visitor Information Needs research also revealed that many visitors to Wales turn up at their accommodation expecting to find leaflets on places to visit and things to do.

Figure 12



Overall satisfaction and expectation

3.54 Respondents were asked to rate their visit that day out of 10. The mean score has increased from previous years as detailed below:

- 2013 mean score: 9.00
- 2011 mean score: 8.75
- 2008 mean score: 8.50

The majority of respondents thought their visit was excellent

3.55 The majority of respondents (66%) thought their visit to the site was excellent rating it a 9 or 10 out of 10. This has increased from 59% in 2011 and 47% in 2008. Only 18 respondents gave a rating of 5 or less out of 10.

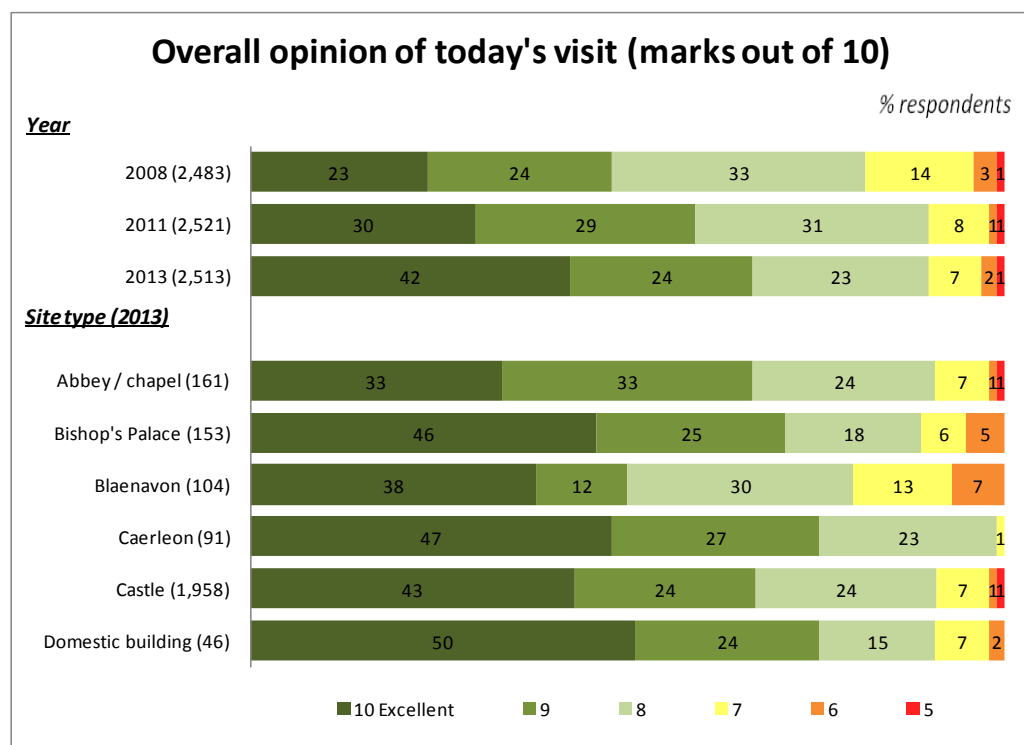
Sites rated highly were Caerleon, Domestic building and Bishop's Palace

3.56 74% respondents rated Caerleon and Domestic building a 9 or 10, followed by 71% of visitors to Bishop's palaces.

Blaenavon received the lowest rating

3.57 Blaenavon was given a rating of 9 or 10 by 50% of respondents (the lowest rating)

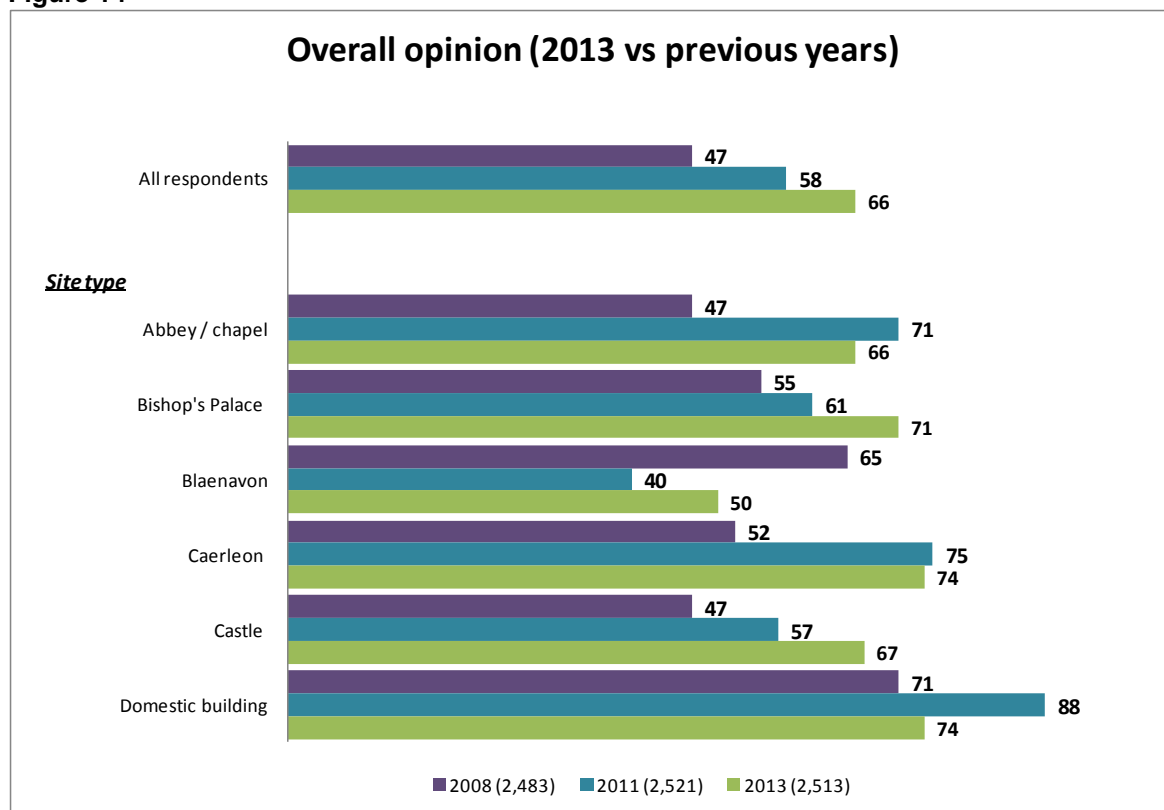
Figure 13



A significant rise in overall satisfaction compared to 2011

- 3.58 As shown in Figure 14 below, there was a significant rise of respondents rating their overall visit as a 9 or 10 out of 10 in 2013 compared to 2011 and 2008.

Figure 14



‘Best things’

‘Scenery/ views’ was the most popular response

- 3.59 Respondents were asked (without prompting) what had been the most enjoyable part of their visit to the site that day. 14% said it was the scenery/ views. The most frequent mentions (1% of more) are listed:

Open ended responses	% of respondents
Scenery/ views	14%
Exploring the site/ looking around/ freedom to explore/ climbing towers & walls/ walking around	7%
Architecture/ layout/ structure/ towers/ ruins/ ramparts	6%
The history/ historic aspect	6%
The castle/ castle grounds/ the castle was amazing	6%
How well maintained the site is/ well preserved/ kept in a good condition/ good restoration work	5%
The size/ grandeur of the site	5%
Everything/ whole experience/ exceeded my expectations	5%
Peaceful/ relaxing/ atmosphere was good	4%
Children enjoyed it/ activities/ children exploring/ a good safe place for the children	4%
The great hall/ rooms/ furniture/ the decor	3%
A lovely place to visit/ nice day out/ amazing place to visit/ family day out	3%
Information provided/ information boards	3%
Accessibility within the site	2%
Houses/ cottages	2%
Beautiful site/ location/ beautiful position/ great setting	2%
Very interesting/ very good	2%
Weather	2%
Audio guides/ guided tour/ good tour	1%
Exhibition/ event	1%
The swimming pool/ the baths	1%
The film/ multimedia presentation	1%
The grounds/ gardens/ flowers	1%
Museum	1%
Lots to see and do	1%
Seeing how people lived/ going back in time	1%
The medieval demonstration/ re-enactments	1%
The water/ waterways are excellent/ the moat	1%

'Worst things'

The majority of respondents said 'nothing'

- 3.60 Respondents were then asked what they had enjoyed the least. Almost two thirds (61%) said 'nothing'. Other main mentions (1% or more) are given below:

Open ended responses	% of respondents
Nothing	61%
Not enough information provided/ better signage	6%
Winding steps/ stairs/ steep/ slippery	3%
Bad weather	3%
Parking	2%
Worries over safety/ barriers are too flimsy/ safety concerns/ safety for children	1%
No cafe/ refreshments	1%
Lack/ poor signage	1%
Quality of audio system/ interactive system not working/ no audio guides	1%
Not enough for children to do/ children's activities/ bit boring for them	1%
Poor disabled access/ pushchair access	1%
Admission fee/ price	1%
Lack of toilets/ need better toilet facilities	1%
Limited access/ couldn't see all of it/ closed off	1%
Walking around the site	1%

Likelihood of visiting again

- 3.61 Respondents were asked how likely they thought that they would return to that attraction within the next 12 months on a four-point scale from 'very likely' to 'very unlikely'.

Overall, over a third of respondents are likely to return in the next 12 months

- 3.62 Overall, over a third of respondents (36%) said they would either very likely or fairly likely to return to the site again in the next 12 months.

Half of those visiting a South West Wales attraction are likely to visit again

- 3.63 Half of those who visited an attraction in South West Wales are more likely to return again within next 12 months compared to 39% in South East, 31% in Mid Wales and 25% in North Wales.

Caerleon does not disappoint once again with the highest number of repeat visitors

- 3.64 The majority of respondents (59%) are likely to visit Caerleon in the next 12 months which has the highest percentage out of all the site types, with domestic building coming last with 16% of respondents. This corresponds with the previous visits results where Caerleon had the most repeat visitors and Domestic building had a higher percentage of first time visitors.

Welsh residents are more likely to return to the site within 12 months

- 3.65 Unsurprisingly, Welsh residents are more likely to visit again in next 12 months (62%) compared to 31% of other UK residents and 12% of overseas.

Day visitors are also more likely to return within the next year

- 3.66 Those on a day visit from home for pleasure are more likely to visit again in the next year (60%) compared with 36% staying with friends/ relatives and 25% staying away from home on holiday.

Those who were aware of Cadw before visiting are also likely to return soon

- 3.67 Respondents who were aware of Cadw prior to their visit are more likely to visit the site again in the next 12 months (46% compared to 26% of those who had no prior knowledge of Cadw).

Satisfaction with elements of their visit

3.68 Respondents were asked to rate a number of aspects regarding their visit that day, as shown in Figure 15. This chart shows the order of satisfaction rating.

Friendliness of staff received the best satisfaction rating

Suitability of exhibitions and info for children under 7 received the worse rating

3.69 Friendliness of staff received the best satisfaction rating (78% gave a rating of 9 or 10 out of 10) and suitability of exhibits and information for children under 7 was rated the lowest (42% gave a rating of 9 or 10).

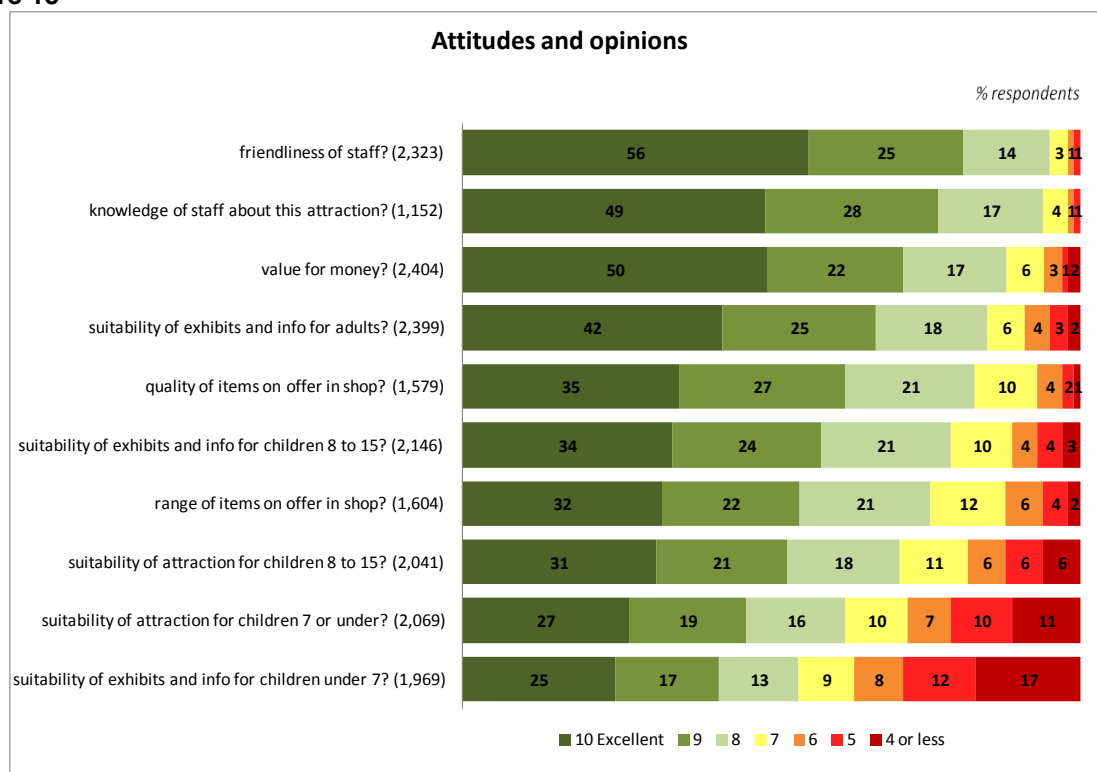
Knowledge of staff and value of money were also rated highly

3.70 The second highly rated aspect was 'knowledge of staff about this attraction' (77%) and the third was value for money with almost three quarter of visitors rating it a 9 or 10.

Suitability of attractions for children needs improving

3.71 Overall, suitability of the attraction and suitability of exhibits and information for children has the lowest satisfaction ratings. Also it is worth noting the younger the children are, the lower satisfaction rating becomes.

Figure 15



Comparing satisfaction with previous years

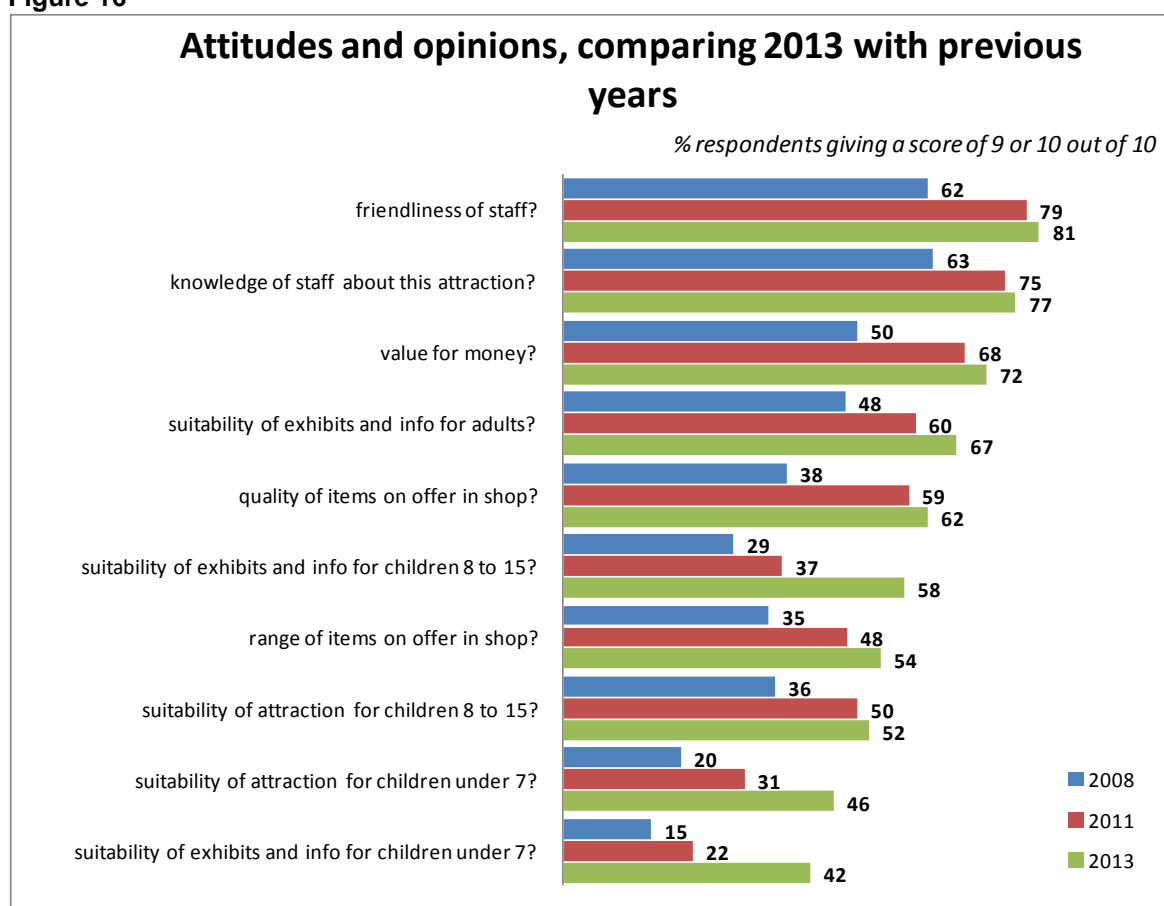
A marked increase in satisfaction across all aspects

- 3.72 When these results are compared with the 2011 and 2008 surveys, it clearly shows there has been a marked increase in scores across all aspects.

Satisfaction for the suitability of attraction for children has increased considerably

- 3.73 Although the suitability of the attraction and suitability of exhibits and information for children was rated the lowest overall, compared to the 2011 results there is a marked increase in satisfaction. The suitability of exhibits and information for children 8 to 15 has increased from 37% to 58% and suitability of exhibits and information for children under 7 has increased from 22% to 42%.

Figure 16



Expectations of visit

The majority of respondents said that their visit had exceeded their expectations

- 3.74 Two thirds of respondents (66%) said their visit was either much better or a little better than they had expected. The results have remained unchanged since 2011.

Top three sites for exceeding expectations were Domestic building, Caerleon and Bishop's Palace

- 3.75 Respondents visiting Domestic buildings, Caerleon and Bishop's Palace were more like to report that their visit had exceeded their expectations (80%, 77% and 77% respectively).

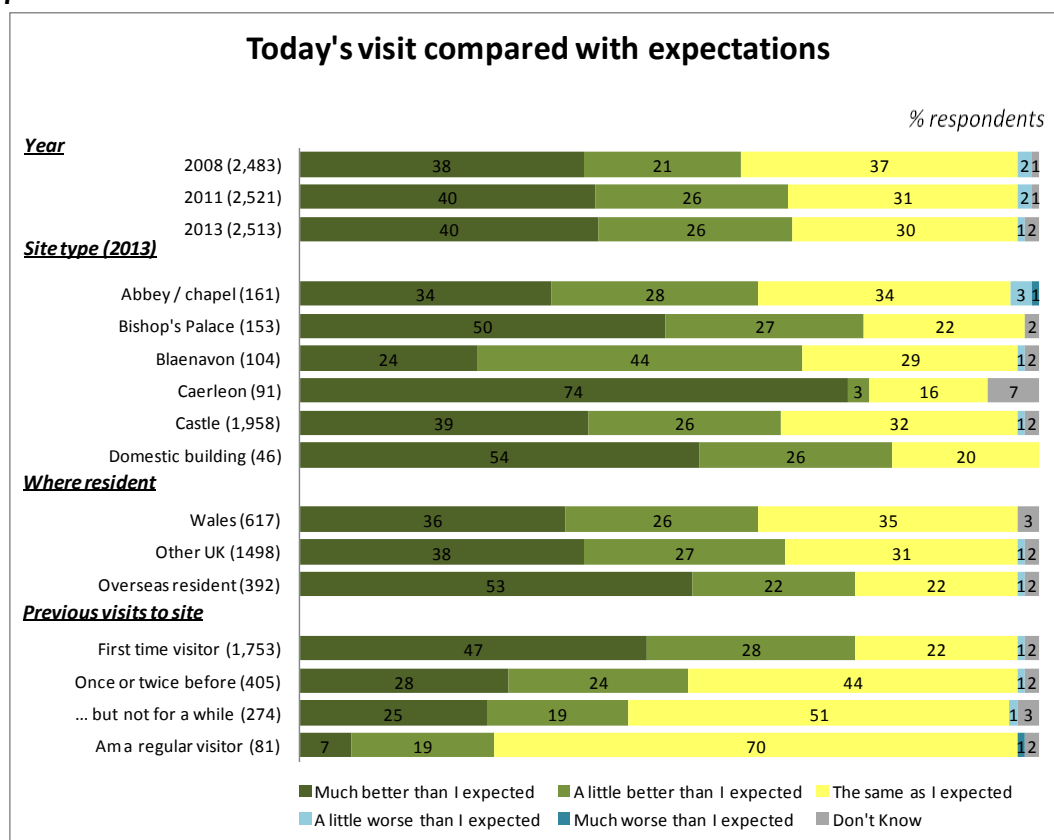
75% of overseas visitors said the visit was better than they had expected

- 3.76 Three quarters of overseas respondents said their visit had exceeded their expectations compared to 65% other UK (outside Wales) and 62% Welsh residents.

Three quarters of first time visitors said their visit exceeded their expectations

- 3.77 First time visitors were also likely to state that their visit had exceeded their expectations (75%)

Figure 17



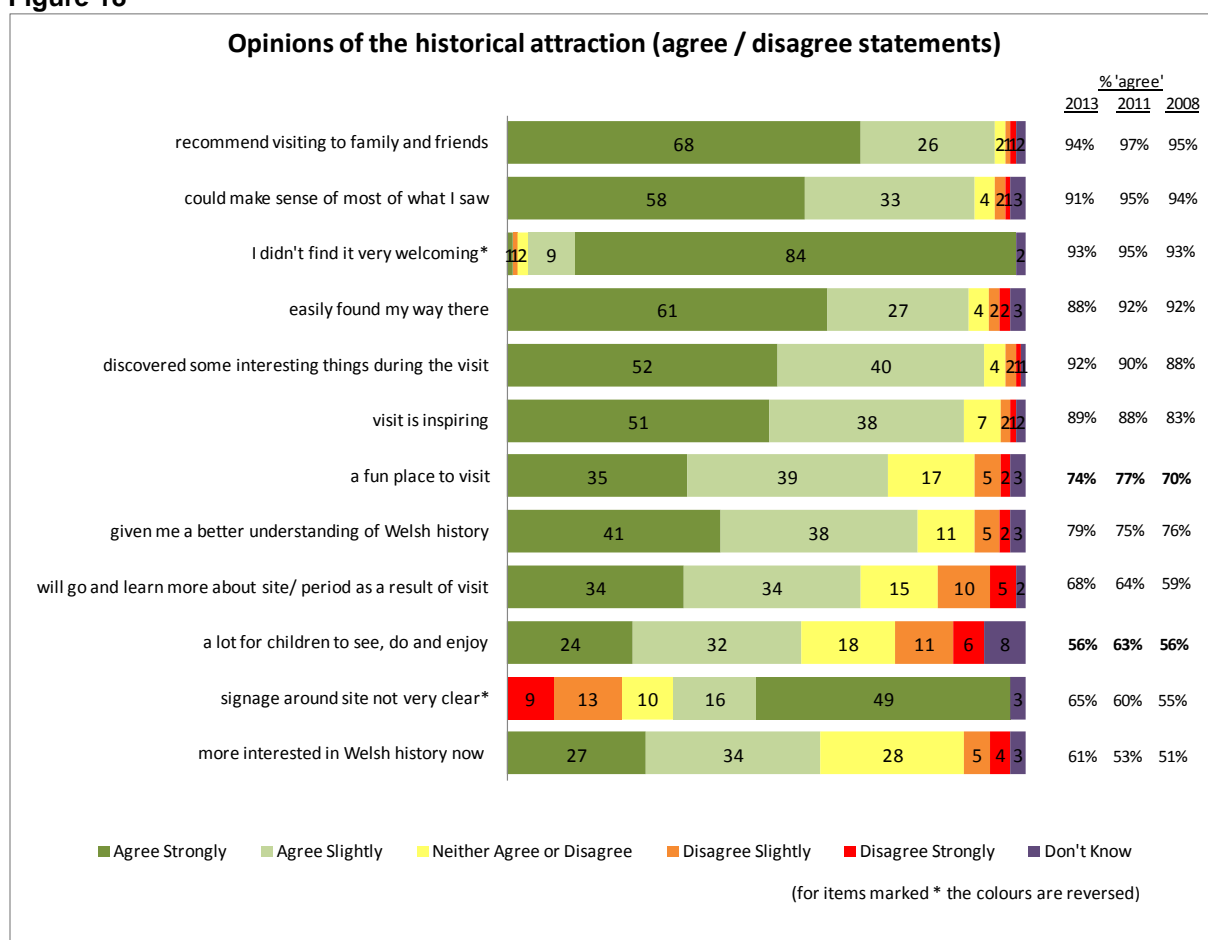
Opinions of the site

- 3.78 Respondents were shown a list of statements and asked to what extent they agreed or disagreed with each one.

Vast majority would recommend the attraction to others

- 3.79 The vast majority of respondents (94%) said they would recommend the Cadw site to family and friends.
- 3.80 93% of respondents found it welcoming; of which 84% agreed strongly to this statement.

Figure 18



Signage could be better

- 3.81 Over a fifth of respondents thought signage around site was not very clear; this received the poorest rating.
- 3.82 A quarter of visitors (25%) to Blaenavon were more likely to say signage was not very clear followed closely by 23% visitors to Castles.

Caerleon, castles and Bishop's Palace were a fun place to visit

- 3.83 82% of those visiting Caerleon thought it was a fun place to visit, compared to 76% at Castles, 73% at Bishop's Palace, 56% at Domestic buildings, 52% at Blaenavon and 50% at Abbeys/ chapels.
- 3.84 Those in a family group were more likely to agree the site was a fun place to visit (82%). This is significantly higher than the other visiting groups.

Lots for children to see and do at Caerleon and Bishop's Palace

- 3.85 The majority of those visiting Caerleon and Bishop's Palace thought there were lots for children to see, enjoy and do at the site. There are significant differences in the number of respondents who agree to this statement when looking at site types:
1. Caerleon (77%)
 2. Bishop's palace (72%)
 3. Castle (57%)
 4. Domestic building (43%)
 5. Blaenavon ironworks (38%)
 6. Abbey/ chapel (37%)

Caerleon, Blaenavon and Bishop's Palace visitors thought their visit gave them a better understanding of Welsh history

- 3.86 The vast majority of respondents visiting Caerleon, Blaenavon and Bishop's Palace said their visit gave them a better understanding of Welsh history (90%, 86% and 82% respectively)
- 3.87 Over half of respondents (57%) visiting Abbeys/ chapels said this.

Admission charges

20% of respondents had free entry

- 3.88 A fifth of respondents (20%) had not paid for their entry because they were eligible for free entry.

The majority thought the admission fee was 'about right'

- 3.89 Of the remaining 1,998 respondents who paid for their entry, 85% thought that the entrance charge was 'about right' (either 'much' or 'a little' too high) and only 9% thought it was too high.

Suggested improvements

Over a third said there were no improvements required

3.90 Respondents were asked (without prompting) what, if anything, they thought could be done to improve the attraction. Over a third (36%) said 'nothing'. The main other responses (over 1% mentions) are given below:

Open ended responses	% of respondents
Nothing	36%
More information/ display boards	12%
Safety rails/ more handrails	5%
More for children to do/ activities for children/ information for children/ more interactive	4%
A cafe/ coffee shop	4%
Better/ more signage	4%
Better/ more audio guides	2%
Re-enactments/ more re-enactments/ period costumes	2%
More/ better toilets/ disabled toilets	1%
Better/ cheaper parking	1%
More exhibits/ events	1%
More interactive areas/ exhibition/ talking posts	1%
A tour/ tour guide	1%
Better directions/ signage to the site	1%
More restoration required	1%
Better/ more lighting	1%
Not safe for children/ more child friendly/ more safety barriers for children	1%
An undercover area needed/ shelter from the rain/ more seating	1%
Better disabled access/ wheelchair access/ pushchair access	1%
Better accessibility within the site	1%
Too expensive/ cheaper/ free admission	1%
More artefacts on display	1%

Health and safety aspect

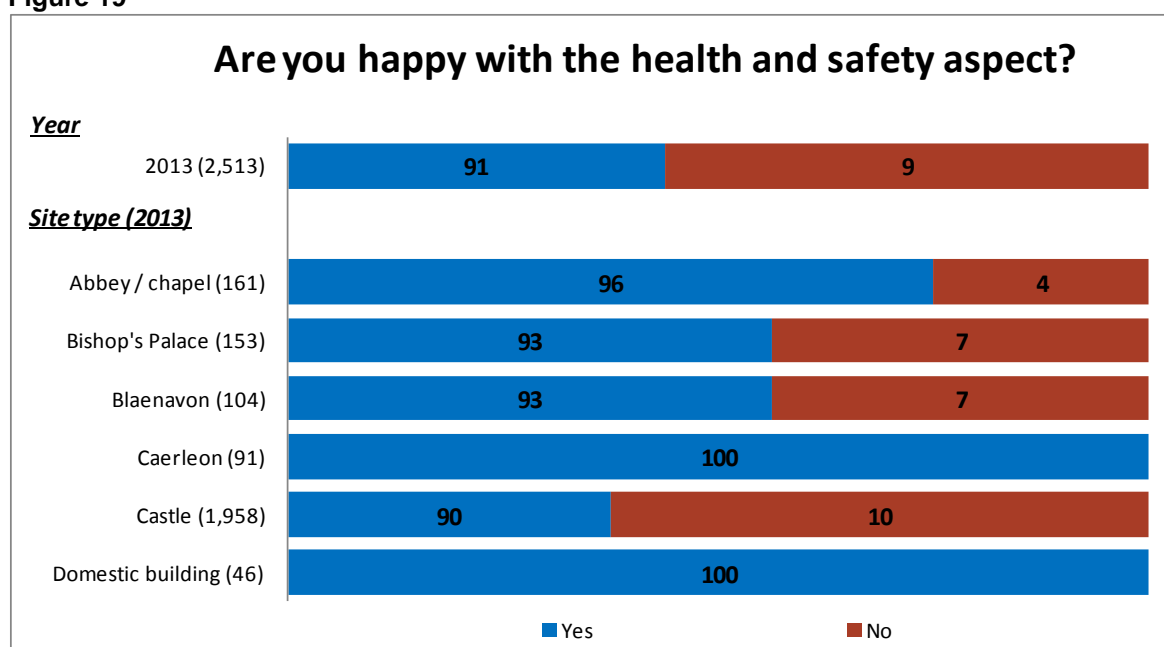
The vast majority of respondents were happy with the health and safety aspects

- 3.91 The vast majority of respondents (91%) were happy with the health and safety aspect at the site they visited.

Health and safety could be improved at Castles

- 3.92 10% of visitors to Castles reported they were not happy with the health and safety aspect of their visit.
- 3.93 This is consistent with the unprompted responses given when asked what can be improved at the sites. 5% of respondents suggested 'Safety rails/ more handrails' as an improvement and 92% of these were visiting Castles. Similarly with those who suggested 'Not safe for children/ more child-friendly/ more safety barriers for children', 96% were visiting Castles.

Figure 19



4. Summary and conclusions

Visitor profile

- 4.1 The profile of visitors was very similar to previous years. Cadw sites remained attractive to more affluent visitors and towards the older generation. The majority described themselves as white ethnic origin.

Cadw awareness

- 4.2 Half of respondents were aware of Cadw before they visited that day. There were fewer visitors in North Wales with awareness of Cadw than in other regions where over half of respondents to sites in South Wales were aware. Those more likely to be unaware of Cadw were those staying with friends/ family, overseas visitors, first time visitors and those aged 16 - 24.

Purpose of visit

- 4.3 The majority of respondents were staying away from home on holiday and around a quarter were on a day visit from home for pleasure. There were more day trips to sites located in South West Wales although Caerleon, a site in South East Wales, was the most popular site among day visitors. Respondents on a day trip were also willing to travel further.

Previous visits

- 4.4 The majority of respondents were first time visitors. Domestic buildings and Blaenavon remained the most popular sites among first time visitors and Caerleon was popular with repeat visitors.

Group composition

- 4.5 Around half of respondents were visiting in a family group and the most popular sites with families were Caerleon, Castles and Blaenavon. There were even fewer children visiting this year than in 2011. There is a downward trend of children under 16 years old visiting Cadw sites since 2008.

Activities for children

- 4.6 The results show that the suitability of the attraction for children has increased considerably since 2008. However, it is evident from the results that improvements are still necessary as the suitability of the attraction, exhibits and info for children received the lowest satisfaction rating.

Reasons for visiting and information sources

- 4.7 The top three main influencing factors for visiting were:
1. Interested in castles/historic sites
 2. Good place to come for a day out
 3. Never been before/ wanted to see it/ curious
- 4.8 The top three information sources prior to visit were:
1. Live in area/ always known about it
 2. Word of mouth
 3. Cadw leaflet for this attraction

Health and safety

- 4.1 The majority of respondents were happy and satisfied with the health and safety aspects of their visit. However, one in ten respondents visiting a Castles were not happy with the safety aspects of the site. Some of the suggestions for improvements were to provide safety rails or better handrails and make it more child-friendly.

Overall satisfaction and return visits

- 4.2 The majority of respondents thought their visit was excellent which has increased significantly since 2008. Caerleon, Domestic building and Blaenavon received the highest satisfaction rating whereas Blaenavon received the lowest.
- 4.3 The friendliness of Cadw staff and knowledge of staff was the most likely cause for such a high satisfaction rating as the vast majority of respondents gave these responses a rating of 9 or 10. There was also strong agreement that Cadw sites were good value for money which is consistent with fact that the majority of respondents thought the admission fee was 'about right'.
- 4.4 The vast majority of respondents would recommend the site to others and over a third said they would likely return again within the next 12 months.

Appendix A – The questionnaire

CADW 2013 Visitor Survey

GENERAL VISITOR SURVEY (GVS)

Good morning/afternoon. My name is ... from Strategic Marketing, an independent research agency working on behalf of Cadw. We are conducting a short survey of visitors here today. Could you spare me a few minutes to answer some quick questions about your visit? This research will be used to improve the experience and service provided to customers. Everything you say will be kept confidential.
(APPROACH PERSONS AGED 16 YEARS AND OVER)

PRE INTERVIEWING QUESTIONS

A Site name

- | | | | | | |
|---------------------------|-----------------------------|--|-----------------------------|-----------------------------|-----------------------------|
| Beaumaris Castle..... | <input type="checkbox"/> 01 | Lamphey Bishops Castle <input type="checkbox"/> 08 | Tintern Abbey..... | <input type="checkbox"/> 15 | |
| Caerleon Fortress Baths . | <input type="checkbox"/> 02 | Laugharne Castle..... | <input type="checkbox"/> 09 | Tretower Court/ Castle | <input type="checkbox"/> 16 |
| Castell Coch..... | <input type="checkbox"/> 03 | Oxwich Castle | <input type="checkbox"/> 10 | Valle Crucis Abbey..... | <input type="checkbox"/> 17 |
| Chepstow Castle | <input type="checkbox"/> 04 | Plas Mawr..... | <input type="checkbox"/> 11 | Weobley Castle | <input type="checkbox"/> 18 |
| Cilgerran Castle | <input type="checkbox"/> 05 | Raglan Castle..... | <input type="checkbox"/> 12 | White Castle..... | <input type="checkbox"/> 19 |
| Dolwyddelan Castle | <input type="checkbox"/> 06 | Rhuddlan Castle..... | <input type="checkbox"/> 13 | | |
| Kidwelly Castle | <input type="checkbox"/> 07 | Rug Chapel | <input type="checkbox"/> 14 | | |

B Day of interview

- | | | | | | |
|-----------------|----------------------------|----------------|----------------------------|---------------------------|----------------------------|
| Monday..... | <input type="checkbox"/> 1 | Thursday | <input type="checkbox"/> 4 | Sunday | <input type="checkbox"/> 7 |
| Tuesday | <input type="checkbox"/> 2 | Friday | <input type="checkbox"/> 5 | Bank holiday weekend | <input type="checkbox"/> 8 |
| Wednesday | <input type="checkbox"/> 3 | Saturday | <input type="checkbox"/> 6 | | |

C Start time of interview (Please record exact time)

D Weather

- | | | | | | | | |
|-------------|----------------------------|--------------|----------------------------|---------------|----------------------------|-----------|----------------------------|
| Sunny | <input type="checkbox"/> 1 | Cloudy | <input type="checkbox"/> 2 | Showers | <input type="checkbox"/> 3 | Rain..... | <input type="checkbox"/> 4 |
|-------------|----------------------------|--------------|----------------------------|---------------|----------------------------|-----------|----------------------------|

ALL RESPONDENTS

Q1 First of all, would you like to take part in this survey in English or Welsh? (Tick one box only)

- | | | | |
|---------------|----------------------------|-------------|----------------------------|
| English | <input type="checkbox"/> 1 | Welsh | <input type="checkbox"/> 2 |
|---------------|----------------------------|-------------|----------------------------|

INTERVIEWER NOTE: If Welsh required and you do not speak it yourself, please hand a self-completion questionnaire to the respondent. Ask them to complete it there and then and hand it straight back to you.

Q2 SHOW CARD A

What is the main purpose of your visit to this town/area today? (Tick one box only)

Routine work purposes ☐ 1
Non-routine business purposes ☐ 2
Day visit from home for pleasure ☐ 3
Volunteering ☐ 4
Other (please specify)

Staying away from home on holiday ☐ 5
Staying with friends/relatives ☐ 6
Other ☐ 7

STAYING VISITORS (Q2=code 5 or 6)

Q3 (STAYING VISITORS - IF Q2=code 5 or 6)

In (or near) which town did you stay last night? (If this is the first day of your trip, where will you stay tonight?) (Write in nearest TOWN or CITY)

ALL RESPONDENTS

Q4 (ALL RESPONDENTS) Are you resident in the UK? (Tick one box only)

Yes ☐ 1

No ☐ 2

Q5 (UK RESIDENTS ONLY - If Q4=code 1)

Please could you tell us your postcode?

NB: This information is for analysis purposes only and to give us an idea where our visitors come from. The data will not be made available to other parties.

(Please write in full postcode below or partial postcode if respondent is unwilling to provide a full postcode)

Q6 (UK RESIDENTS ONLY - If Q4=code 1)

And which town or city is that closest to? (Write in nearest TOWN or CITY)

Q7 (NON UK RESIDENTS ONLY - If Q4=code 2)

If you live outside the UK, where is your home city and country? (Write in nearest CITY and COUNTRY)

Name of City.....

Name of Country

Q8 (ALL RESPONDENTS) And from where you stayed last night, how far did you travel today to this site? (Tick one box only)

10 miles or less.....	<input type="checkbox"/>	50+ miles.....	<input type="checkbox"/>
11 - 25 miles.....	<input type="checkbox"/>	Don't know.....	<input type="checkbox"/>
26 - 49 miles.....	<input type="checkbox"/>		

Q9 (ALL RESPONDENTS) And from where you stayed last night, how long did it take you to travel here? (Write in number of minutes)

Q10 (ALL RESPONDENTS) SHOW CARD E

Who are you with today? (Tick one box only)

Alone.....	<input type="checkbox"/> 1	With an organised group.....	<input type="checkbox"/> 6
With spouse/partner.....	<input type="checkbox"/> 2	With business colleagues.....	<input type="checkbox"/> 7
With family group.....	<input type="checkbox"/> 3	With an educational trip.....	<input type="checkbox"/> 8
With friends.....	<input type="checkbox"/> 4	Other.....	<input type="checkbox"/> 9
With family and friends.....	<input type="checkbox"/> 5		
Other (please specify)			

Q11 (ALL RESPONDENTS) SHOW CARD F

And can you tell me how many people there are in your group in each of the following categories, including yourself?

(Write in number of individuals in each of the following age groups)

Children aged 7 or under.....	<input type="text"/>
Children aged 8-15.....	<input type="text"/>
Children aged 16.....	<input type="text"/>
Adults 17.....	<input type="text"/>
Adults 18-24.....	<input type="text"/>
Adults 25-34.....	<input type="text"/>
Adults 35-44.....	<input type="text"/>
Adults 45-59.....	<input type="text"/>
Adults 60+.....	<input type="text"/>
TOTAL in group (interviewer to add up and confirm with respondent)	<input type="text"/>

Q12 (ALL RESPONDENTS) Have you ever visited here before? (Tick one box only)

First time visitor.....	<input type="checkbox"/> 1	Have been a number of times, but not for a while.....	<input type="checkbox"/> 4
Once before.....	<input type="checkbox"/> 2	Am a regular visitor.....	<input type="checkbox"/> 5
Twice before.....	<input type="checkbox"/> 3		

Q13 (ALL RESPONDENTS) Have you visited any other historic attractions, such as castles, abbeys and historic monuments, in the last 3 months? If yes, ask "How many?" (Tick one box only)

Yes - one	<input type="checkbox"/> 1	Yes - three or more	<input type="checkbox"/> 3
Yes - two	<input type="checkbox"/> 2	No - no others	<input type="checkbox"/> 4

Q14 (ALL RESPONDENTS) SHOW CARD G

I would now like to ask you about different aspects of your visit to [SITE NAME] today.

Q14a - Which of these factors would you say influenced your decision to visit [SITE NAME] today?
(Tick as many as apply)

Q14b - And which one was most important to your decision to visit? (Tick one box only)

	Q14a - Was a factor (Tick as many as apply)	Q14b - Most important factor (Tick one box only)
A) Good place to come for a day out	<input type="checkbox"/>	<input type="checkbox"/>
B) Wanted to see a particular exhibition	<input type="checkbox"/>	<input type="checkbox"/>
C) Interested in castles / historic sites	<input type="checkbox"/>	<input type="checkbox"/>
D) Interested in Welsh culture / history	<input type="checkbox"/>	<input type="checkbox"/>
E) Wanted to find out and learn more about this site	<input type="checkbox"/>	<input type="checkbox"/>
F) The weather is good	<input type="checkbox"/>	<input type="checkbox"/>
G) Free admission	<input type="checkbox"/>	<input type="checkbox"/>
H) Wanted to see/take part in a special event or activity	<input type="checkbox"/>	<input type="checkbox"/>
I) Saw a brochure or leaflet for this historic attraction	<input type="checkbox"/>	<input type="checkbox"/>
J) Saw some other advertising for this historic attraction	<input type="checkbox"/>	<input type="checkbox"/>
K) Been recommended by a friend, acquaintance or relative	<input type="checkbox"/>	<input type="checkbox"/>
L) The children wanted to come	<input type="checkbox"/>	<input type="checkbox"/>
M) Never been before, wanted to see it / curious	<input type="checkbox"/>	<input type="checkbox"/>
Don't know	<input type="checkbox"/>	<input type="checkbox"/>
None of these	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
Q14a - Other	<input type="text"/>	
Q14b - Other	<input type="text"/>	

Q15 (ALL RESPONDENTS) SHOW CARD H

And using this card, can you tell me how you found out about this attraction before visiting?
(Tick all that apply)

Leaflet for this attraction (Cadw)	<input type="checkbox"/> 01	Tourist Information Centre	<input type="checkbox"/> 09
Brochure for this attraction (Cadw)	<input type="checkbox"/> 02	Advert : Newspaper.....	<input type="checkbox"/> 10
Cadw website	<input type="checkbox"/> 03	T.V.....	<input type="checkbox"/> 11
Heritage in Wales magazine	<input type="checkbox"/> 04	Radio.....	<input type="checkbox"/> 12
Poster	<input type="checkbox"/> 05	a: Other leaflet (please specify below)	<input type="checkbox"/> 13
Word of mouth.....	<input type="checkbox"/> 06	b: Other brochure (please specify below) ...	<input type="checkbox"/> 14
Road signs	<input type="checkbox"/> 07	c: Other website (please specify below).....	<input type="checkbox"/> 15
Live in area / always known about it	<input type="checkbox"/> 08	d: Other (please specify below).....	<input type="checkbox"/> 16
a: Other leaflet (please specify)			
b: Other brochure (please specify)			
c: Other website (please specify)			
d: Other (please specify)			

Q16 (IF LEAFLET OR BROCHURE AT Q15 - If Q15=code 1, 2, 13 and / or 14) SHOW CARD I

And can you tell where you found the leaflet or brochure used to find out about this attraction?
(Tick all that apply)

Hotel / guest house	<input type="checkbox"/> 01	Libraries	<input type="checkbox"/> 07
Caravan park.....	<input type="checkbox"/> 02	Pubs / restaurants.....	<input type="checkbox"/> 08
Self-catering outlet	<input type="checkbox"/> 03	Retail outlets / shops.....	<input type="checkbox"/> 09
Leisure centre	<input type="checkbox"/> 04	Tourist Information Centre	<input type="checkbox"/> 10
Arts centres (e.g. museums, concert halls)	<input type="checkbox"/> 05	Motorway Services.....	<input type="checkbox"/> 11
Tourist attractions.....	<input type="checkbox"/> 06	Other (please specify)	<input type="checkbox"/> 12
Other (please specify)			

Q17 (ALL RESPONDENTS) SHOW CARD J

Can you tell me whether, overall, your visit to this site today was better, worse or the same as you expected? (Tick one box only)

Much better than I expected.....	<input type="checkbox"/> 1	A little worse than I expected	<input type="checkbox"/> 4
A little better than I expected.....	<input type="checkbox"/> 2	Much worse than I expected	<input type="checkbox"/> 5
The same as I expected.....	<input type="checkbox"/> 3	Don't know.....	<input type="checkbox"/> 6

Q18 (ALL RESPONDENTS) What would you say has been the most enjoyable part of your visit today to [SITE NAME]? (Write in below)

(ALL RESPONDENTS) And what have you enjoyed least? (Write in below)

--

(ALL RESPONDENTS) SHOW CARD K

Looking at this card, can you tell me your opinion by rating each of the following aspects of your visit to [SITE NAME]? Where 1 is very poor and 10 is excellent
(Rotate order of reading and tick box to show start)

[illegible]

Q21 (ALL RESPONDENTS) SHOW CARD L

I am now going to read out some things that people have said about [SITE NAME]. I would like you to tell me how much you agree or disagree with each statement. Please use this card to give your answer. Again, there are no right or wrong answers, it's just your opinion we are interested in. (Rotate order of reading and tick box to show start)

	Agree Strongly	Agree Slightly	Neither Agree or Disagree	Disagree Slightly	Disagree Strongly	Don't know
A) I will go and learn more about the site, or this period in history, as a result of my visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B) I discovered some interesting things during the visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C) A visit to this site is inspiring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D) I'd recommend visiting this historic attraction to family and friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E) I didn't find this historic attraction very welcoming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F) I think this is a fun place to visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G) The visit has given me a better understanding of Welsh history	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H) I could make sense of most of what I saw during the visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I) There's lots for children to see, do and enjoy at this historic attraction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
J) I easily found my way to this historic attraction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
K) The signage directing you around this site is not very clear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L) I am more interested in Welsh history now than I was before my visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q22 (ALL RESPONDENTS) SHOW CARD M

Thinking about how much it cost you for admission today, can you tell me your opinion of it? (Tick one box only)

Much too high.....	<input type="checkbox"/> 1	Much too low	<input type="checkbox"/> 5
A little too high.....	<input type="checkbox"/> 2	Don't know / not sure.....	<input type="checkbox"/> 6
About right.....	<input type="checkbox"/> 3	Not applicable - was eligible for free entry ..	<input type="checkbox"/> 7
A little too low	<input type="checkbox"/> 4		

Q23 (ALL RESPONDENTS) SHOW CARD N

How likely or unlikely do you think it is that you will visit this attraction again within the next 12 months? (Tick one box only)

Very likely.....	<input type="checkbox"/> 1	Very unlikely.....	<input type="checkbox"/> 4
Fairly likely	<input type="checkbox"/> 2	Not sure/Don't know	<input type="checkbox"/> 5
Fairly unlikely	<input type="checkbox"/> 3		

Q24 (ALL RESPONDENTS) Are you happy with the health and safety aspects of this site? (Tick one box only)

Yes.....	<input type="checkbox"/> 1	No.....	<input type="checkbox"/> 2
----------	----------------------------	---------	----------------------------

Q25 (ALL RESPONDENTS) What do you think could be done to improve this attraction?

PROMPT AFTER FIRST RESPONSE - Anything else? (Write in below)

Q26 (ALL RESPONDENTS) Had you heard of Cadw before the start of this interview?

IF YES "Had you heard about Cadw before arriving here today?" (Tick one box only)

No.....	<input type="checkbox"/> 1	Yes, but only when we arrived here today ..	<input type="checkbox"/> 3
Yes, before arriving here today	<input type="checkbox"/> 2		

Q27 (ALL RESPONDENTS) SHOW CARD O

We'd like to ask some questions about you... Firstly, how would you describe your ethnic group? (Tick one box only)

White - British.....	<input type="checkbox"/> 01	Asian or Asian British - Indian	<input type="checkbox"/> 12
White - Welsh	<input type="checkbox"/> 02	Asian or Asian British - Pakistani	<input type="checkbox"/> 13
White - English	<input type="checkbox"/> 03	Asian or Asian British - Bangladeshi	<input type="checkbox"/> 14
White - Scottish	<input type="checkbox"/> 04	Asian or Asian British - Other (please specify)	<input type="checkbox"/> 15
White - Irish	<input type="checkbox"/> 05	Black or Black British - African	<input type="checkbox"/> 16
White - Gypsy or Irish Traveller.....	<input type="checkbox"/> 06	Black or Black British - Caribbean.....	<input type="checkbox"/> 17
White - Other (please specify).....	<input type="checkbox"/> 07	Black or Black British - Other (please specify).....	<input type="checkbox"/> 18
Mixed - White and Black Caribbean.....	<input type="checkbox"/> 08	Chinese	<input type="checkbox"/> 19
Mixed - White and Black African	<input type="checkbox"/> 09	Arab.....	<input type="checkbox"/> 20
Mixed - White and Asian	<input type="checkbox"/> 10	Any other ethnic background (please specify).....	<input type="checkbox"/> 21
Mixed - Other (please specify)	<input type="checkbox"/> 11		
Other (please specify)			

Q28 (ALL RESPONDENTS) SHOW CARD P

Can you tell me if you can do any of the things on this card? (Tick all that apply)

Speak Welsh - fluently	<input type="checkbox"/> 1	Read Welsh.....	<input type="checkbox"/> 4
Speak Welsh - but not fluently	<input type="checkbox"/> 2	Write Welsh.....	<input type="checkbox"/> 5
Understand spoken Welsh	<input type="checkbox"/> 3	None of the above.....	<input type="checkbox"/> 6

Q29 (ALL RESPONDENTS) And can you tell me what your first language is? (Tick one box only)

(Interviewer Note: i.e. The language that the respondent feels most comfortable using / speaks the most)

English	<input type="checkbox"/> 1	Other	<input type="checkbox"/> 3
Welsh	<input type="checkbox"/> 2		
Other (please specify)			

Q30 (ALL RESPONDENTS) Do you, or any in your immediate party, have any long-term health problems which limit your access to leisure activities or facilities? (Tick one box only)

Yes ☐ 1 No ☐ 2

Q31 (ALL RESPONDENTS) Are there any children aged under 16 living in your household? (Tick one box only)

Yes ☐ 1 No ☐ 2

Q32 (ALL RESPONDENTS) Does your household include anyone who is in full time employment? (Tick one box only)

Yes ☐ 1 No ☐ 2

Q33 (ALL RESPONDENTS) Who is the Chief Income Earner* in your household? You or someone else? (Tick one box only)

*(*The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other income. This person can be of either sex)*

Respondent ☐ 1 Other adult ☐ 2

Q34 (ALL RESPONDENTS) What is the occupation of the Chief Income Earner? (last job if retired)

Actual job
Position / grade

Q35 (ALL RESPONDENTS) Social class (Interviewer: please code) (Tick one box only)

AB <input type="checkbox"/> 1	D <input type="checkbox"/> 4
C1 <input type="checkbox"/> 2	E <input type="checkbox"/> 5
C2 <input type="checkbox"/> 3	Refused <input type="checkbox"/> 6

Q36 (ALL RESPONDENTS) What is your age? (Write in exact age and then code) (Tick one box only)

16-19 <input type="checkbox"/> 1	55-59 <input type="checkbox"/> 6
20-24 <input type="checkbox"/> 2	60-64 <input type="checkbox"/> 7
25-34 <input type="checkbox"/> 3	65 and over <input type="checkbox"/> 8
35-44 <input type="checkbox"/> 4	Refused <input type="checkbox"/> 9
45-54 <input type="checkbox"/> 5	

Respondents exact age (Write in here)

Q37 (ALL RESPONDENTS) INTERVIEWER RECORD RESPONDENT GENDER (Tick one box only)

Male ☐ 1 Female ☐ 2

ALL RESPONDENTS

PLEASE RECORD THE FOLLOWING INFORMATION

This information is for back checking purposes only and your details will not be passed to any third parties. A representative of Strategic Marketing may call you to confirm this interview took place and established whether this interview was conducted in a professional manner.

Respondent name	<input type="text"/>
Address	<input type="text"/>
Full postcode	<input type="text"/>
Telephone number	<input type="text"/>
Best time to call	<input type="text"/>

PLEASE THANK RESPONDENTS FOR TAKING PART & PROVIDE A THANK YOU LEAFLET

Interviewer Declaration: I declare that this interview was conducted in accordance with your instructions and within the code of conduct of the Market Research Society.

PLEASE COMPLETE THE FOLLOWING:

Full name:.....	<input type="text"/>
End time of Interview - RECORD EXACT TIME	<input type="text"/>
Date of interview:.....	<input type="text"/>
OFFICE USE ONLY - Sequence Number	<input type="text"/>