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Visits to Tourist Attractions in Wales 2019 & 2020

Report for Visit Wales

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This document is also available in Welsh.

Visits to Tourist Attractions in Wales in 2019 and 2020

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

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Glossary of acronyms and how to read the tables

Visit Wales and SRI would like to thank all representatives and operators in the attractions sector that provided information for the survey on which this report is based. Without their assistance it would not be possible to collate these figures.

Estimates / visit figures unavailable

Figures shown in this report are given in good faith on the basis of information provided by the proprietors of attractions. Please note it can be difficult to differentiate between different types of visitors at certain attractions.

If an attraction estimated their yearly visitor figure then the figure provided by them includes an asterisk (*).

Admission

If an attraction has an admission charge, the adult admission charge for high season is given. If the attraction said they charge for admission but did not provide the admission charge it is marked with NP (= not provided).

Admission charges included in the report are those provided to SRI by operators. These may be different to those quoted on websites.

Attraction categories

Attractions have been classed by category for analysis purposes. The categories are shown in the table overleaf. Please note that attractions do not always fall neatly into one category. We have classed each attraction into the category in which they best fit.

Abbreviations

CATEGORY	ACRONYM	EXPLANATION
Regions	M	Mid Wales
	N	North Wales
	SE	South East Wales
	SW	South West Wales
Ownership	AC-NMW	Amgueddfa Cymru National Museum Wales
	Cadw	Cadw (Welsh Historic Monuments)
	DCWW	Dŵr Cymru Welsh Water
	LA/ NP	Local Authority / National Park
	NRW	Natural Resources Wales
	NT	National Trust
	PO	Privately owned (private individual owners, organisation / trust etc.)
Category	RSPB	The Royal Society for the Protection of Birds
	A / A	Adventure / activity attraction
	CP	County park, garden, other nature-based attractions
	Farm	Farm / rare breeds
	F / D	Food or drink attraction
	HP	Historic properties, castles, forts, historic houses, palaces, historic monuments, archaeological sites, other historic properties, heritage centres, places of worship
	IND	Industrial / craft attraction
	MAG	Museums and / or art galleries, arts centres
	R / T	Railway / tramway / travel / transport attraction / tours
	SC / T	Science / technology centre
	Theme	Leisure parks, theme parks
	WL	Wildlife or nature reserve
	OTH	Other attraction
Employee type	FT	Full-time
	PT	Part-time
	UV	Unpaid volunteer

1. **Headline findings**

Postponement of the 2019 survey

- 1.1 The Survey of Visits to Tourist Attractions is conducted annually, and each year's survey asks for figures for the previous year.
- 1.2 The Survey of Visits to Tourist Attractions for 2019, due to be conducted in 2020, was postponed due to the COVID-19 pandemic. Many attractions were closed, meaning it was not possible to conduct the survey.
- 1.3 As a consequence of this, attractions were asked for their visitor data for 2019 and 2020 through one survey, conducted in 2021.

COVID-19 related context

- 1.4 The World Health Organization declared COVID-19 a pandemic on 11 March 2020. On 20 March 2020, the UK Prime Minister announced that the Government were "telling cafes, pubs, bars, restaurants to close tonight" as well as "nightclubs, theatres, cinemas, gyms and leisure centres". This escalated into a full lockdown on 23 March 2020.
- 1.5 Attraction business were not allowed to operate for much of 2020. Across the whole of the year, outdoor attractions were allowed to open for approximately 31 weeks of the year, whilst indoor attractions were allowed to be open for approximately 29 weeks, and underground attractions for approximately 27 weeks.

Response rate

- 1.6 569 attractions believed to fit the tourist definition were invited to take part. Attractions were invited to complete the survey online, and those who did not respond were asked to complete the survey by telephone.
- 1.7 53% of attractions were able to complete the sections of the survey which asked about 2019, and 46% were able to complete the section which asked about 2020.

Recording method for visitor numbers

- 1.8 In order to assess the reliability of visitor figures provided by attractions, attractions were asked how they work out their visitor figures.
- 1.9 The proportion basing their 2019 or 2020 visitor figures on 'estimates only' is higher than in previous years. 16% of attractions said that their visitor figures for 2020 were based on 'estimates only', and 17% said the same for 2019. This compares to 9% of attractions in 2018 which said their visitor figures were based on 'estimates only'.

- 1.10 This may be due to the increase in smaller, individual attractions completing the survey, who may be more likely to rely on estimates than larger attractions. Also, some attractions did not have access to the information they would usually have, including visitor figures for 2019 and/or 2020, for reasons related to COVID-19.
- 1.11 Although the proportion of attractions basing their visitor figures on 'estimates only' increased, these attractions only make up a small proportion of the sample, and the remaining attractions calculated their visitor figures based on more accurate recording methods.
- 1.12 In 2020, 45% of attractions reported that their visitor figures are 'estimates' and not 'exact' figures, whilst the figure for 2019 was almost identical (46%).
- 1.13 Estimated figures can be straightforward estimates, or may be based on sample counts or other data collected by the attraction. Estimates also include attractions which use more precise counting methods, such as ticket sales, mechanical methods, or manual counting, but do not have exact figures, in which case they often classed their visitor figures as 'estimates'. This includes, as an example, attractions which base their visitor figures on ticket sales, but make assumptions on the number of visitors that form family or other group bookings. Or similarly, attractions which use 'manual methods' of counting visitors, which are good indicators of visitor numbers, but not always 100% exact.

Operating context for 2019 and 2020

- 1.14 In March 2019, 80% of the attractions providing data were open, whereas this reduced to 57% for March 2020 when the UK went into a full lockdown.
- 1.15 In April and May 2020, only 3% of attractions providing data were open. Attractions were not allowed to open at this time, but these attractions represent outdoor attractions providing public access for exercise.
- 1.16 Some attractions were closed throughout 2020 and others did not reopen after the first lockdown in March 2020. 15% of attractions responding to the survey were closed throughout 2020, whilst 18% of attractions opened at some point between January and March but then remained closed for the rest of the year. Therefore, a third (33%) were not open at all between April and December 2020.
- 1.17 Indoor attractions were less likely to be open than outdoor attractions. In August 2020 – typically one of the busiest months for attractions, only 34% of indoor attractions were open, whereas a significantly higher proportion of outdoor attractions were open (73%).
- 1.18 Over half (57%) of attractions said that they chose to stay open whenever they were allowed to do so. 38% said they chose to close at some point because of COVID-19, even though they were allowed to reopen, and 5% said they chose to close, even when they were allowed to reopen, but for reasons unrelated to COVID-19.

- 1.19 Attractions that were open at any point between March and December 2020 were asked at what percentage of their normal capacity level they were operating at, on average, when open during this time.
- 1.20 One in ten attractions (10%) were operating at less than 20% of their normal capacity level, whilst just under half (46%) were operating between 20% and 49% of their normal capacity level. 28% were operating between 50% and 79% of their normal capacity level, and 7% were operating between 80% and 99% of their normal capacity level. Around one in ten (9%) attractions were open at full capacity.

Visits in 2019 and 2020

- 1.21 Approximately 22.3 million visits were made to attractions in Wales which provided data for 2019, whilst approximately 6.2 million visits were made to attractions which provided data for 2020.
- 1.22 The top 25 attractions in 2019 accounted for almost half of all visits recorded in 2019 (49% of visits, and 10,838,139 visits overall). In 2020, the top 25 attractions accounted for 64% of visits (3,950,766 visits overall).
- 1.23 The share of visits to free and paid attractions is almost identical for 2019 and 2020. In 2019, 57% of visits were to free attractions and in 2020, 59% of visits were to free attractions. Similarly, in 2019 43% of visits were to paid attractions and in 2020 41% of visits were to paid attractions. These figures are also similar to 2018 (61% of visits were to free attractions and 39% of visits were to paid attractions).
- 1.24 The average number of visits per attraction for 2019 (74,647) was lower than the average number of visits in 2018 (89,610). This may be due to the increase in the response rate in 2019 compared to 2018, as more smaller attractions completed the survey. The average number of visitors per attraction reduced significantly to 27,914 in 2020.

Top attractions in 2019

- 1.25 The paid attraction reporting the highest number of visitors in 2019, as in previous years, was the LC Waterpark and Leisure Complex in Swansea (678,714 visitors). Cardiff Castle was the second most visited paid attraction (502,224 visitors) and Folly Farm was the third most visited paid attraction (438,234 visitors).
- 1.26 Of the free admittance attractions providing data for 2019, the Wales Millennium Centre, also the top free attraction in 2018, received the highest number of visitors (1,142,706¹). Tir Prince

¹ The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for ... theatrical ... performances', does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the Wales Millennium Centre do not include theatre goers, or visitors whose main purpose of visit is associated with the theatre (e.g., ticket sales/collection etc.). For this reason, the

Fun Park was the second most visited free attraction (approximately 1,000,000 visitors), and St Fagans National Museum of History was the third most visited free attraction (746,105 visitors).

Top attractions in 2020

- 1.27 The paid attraction reporting the highest number of visitors in 2020 was Folly Farm (203,073 visitors). The second and third most visited paid attractions were Cardiff Castle (195,930 visitors) and LC Waterpark and Leisure Complex in Swansea (185,312 visitors).
- 1.28 Of the free admittance attractions providing data for 2020, Pembrey Country Park accounted for the highest number of visitors (405,444). Snowdon received the second most visitors (329,258 visitors) and Pontcysyllte Aqueduct & Trevor Basin Visitor Centre received the third most visitors (275,336 visitors). The Wales Millennium Centre, previously the top free attraction in 2019, fell to fifth in the list of top ten free attractions (203,552 visitors). St Fagans National Museum of History, previously the third most visited free attraction in 2019, was not in the top ten for 2020 (112,379 visitors).

Visits in 2019 and 2020 by region

- 1.29 Participating attractions in North Wales and South East Wales received the highest share of visits in 2019 (38% and 30% respectively) and in 2020 (37% and 29%). Attractions in South West Wales accounted for 21% of visits in 2019 and 23% of visits in 2020, whilst attractions in Mid Wales accounted for around one in ten visits in both years.
- 1.30 The percentage decrease in average visits per attraction for 2020 is relatively similar for Mid Wales, North Wales and South East Wales (a 66%, 63% and 67% decrease from 2019). The decrease in average visits per attraction is smaller for attractions in South West Wales (53% decrease from 2019). Although this is still a dramatic decrease.

Visits in 2019 and 2020 by attraction category

- 1.31 Attractions are categorised by their venue type – indoor, outdoor, both indoor and outdoor, or underground. Some attractions do not neatly fall into one category. For example, many attractions have both indoor and outdoor areas but are predominantly an indoor or outdoor attraction. Nevertheless, data for purely indoor and purely outdoor attractions shows the changing visitor trend for 2020.
- 1.32 Indoor attractions accounted for 30% of visits in 2019, but only 20% in 2020, whilst outdoor attractions accounted for 23% of visits in 2019, but this increased to 38% in 2020. Attractions

Millennium Centre is listed in this report, whilst recognising that it does not match the definition of a tourist attraction in every respect. This must be considered when comparing with other entries.

which have both indoor and outdoor parts accounted for 44% of visits in 2019 and 41% in 2020, whilst underground attractions accounted for 2% of visits in both years.

- 1.33 The most visited type of attraction in 2018 were museums/art galleries where they accounted for 25% of all visits to attractions. In 2019, museums/art galleries accounted for more or less the same proportion of all visits to attractions (26%). However, in 2020, visits to museums/art galleries only accounted for 15% of all visits to attractions. Some museums/art galleries required pre-booking to limit the amount of visitors at a time (to ensure social distancing), so it is no surprise that these types of attractions accounted for fewer visits in 2020.
- 1.34 Wildlife/nature reserves and country parks/gardens accounted for nearly half (45%) of visits to attractions in 2020, much higher than their proportion of visits for 2019 (26%). In 2018, visits to wildlife/nature reserves and country parks/gardens accounted for 32% of visits to attractions.
- 1.35 The average number of visits by attraction category also shows that country parks/gardens and wildlife/nature reserves were not as badly hit as other attraction categories. The average number of visitors for country parks/gardens fell by 40% in 2020, whilst the average number of visitors for wildlife/nature reserves fell by 35%. This compares to a 63% decrease in the overall average number of visitors per attraction.
- 1.36 Again, this suggests that outdoor attractions were not hit as badly as indoor attractions, which is perhaps to be expected as they were able to open earlier and there would have been less risk attached to visiting outdoor attractions.
- 1.37 Of the remaining attraction categories, railway/travel attractions also appeared to suffer slightly more than others. These attractions saw some of the largest year on year decreases in average visitor numbers in 2020 compared to 2019 (82% decrease). This is to be expected given that attractions where visitors are typically close together will have suffered as a result of social distancing measures.

Average visits by ownership for 2019 & 2020

- 1.38 The average number of visits per Cadw site decreased from 51,425 in 2019 to 10,386 in 2020, an 80% decrease. Amgueddfa Cymru – National Museum Wales had an average of 278,827 visitors per site in 2019, but this fell to 49,895 in 2020, an 82% decrease. Of the National Trust sites able to provide visitor figures, these had an average of 93,999 visitors per site in 2019, but this fell to 27,107 in 2020, a 71% decrease.
- 1.39 Many of the attractions from these owners were also significantly impacted by social distancing requirements. For example, to accommodate social distancing, many of these organisations placed a cap on the number of visitors their attractions could accommodate at any time. Whilst some of their attractions may have sold out at peak times, the number of

visitors they could accommodate was well below pre-pandemic levels. These attractions would also usually receive a significant number of school trips throughout the year.

- 1.40 For example, at points during 2020 Cadw limited visitor numbers at staffed sites to one third of the usual capacity, to enable social distancing and other COVID-19 safety measures, resulting in suppressed visitor numbers at times when demand outstripped the reduced capacity. Furthermore, Cadw staffed sites reopened on a phased basis from August 2020, after being closed since 23 March 2020. The reopening spanned a number of months and resulted in the majority of staffed sites reopening by the end of September. However, some seasonal sites remained closed for the remainder of the year and other sites were subject to local lockdown restrictions, as well as the national fire-break lockdown later in the year that affected all sites.
- 1.41 In comparison to the figures above, the average number of visits per attraction operated by local authorities/ national parks decreased from 92,898 in 2019 to 46,879 in 2020, a 50% decrease. The average number of visits per attraction operated by private owners/ trusts decreased from 58,781 in 2019 to 20,170 in 2020, a 66% decrease. Whilst these are significant decreases, they are not as large as the decreases seen by Cadw, Amgueddfa Cymru – National Museum Wales, and the National Trust.

Comparative analysis of visits to tourist attractions

- 1.42 This section of the report looked at attractions that provided data for both 2018 and 2019 (162 attractions), and both 2019 and 2020 (258 attractions), in order to make like for like comparisons of overall visitor numbers.
- 1.43 The number of visits to attractions which provided data for both 2018 and 2019 was more or less identical. These attractions received 16,953,943 visitors in 2018, and 16,898,566 visitors in 2019. This represents a 0.3% year on year decrease in 2019 from 2018.
- 1.44 Attractions which provided data for both 2019 and 2020 saw a 68% decrease in visitor numbers in 2020 compared to 2019. These attractions received 19,047,363 visits in 2019, but this reduced significantly to 6,139,493 in 2020.
- 1.45 In keeping with other findings, country parks/ gardens and wildlife/nature reserves which provided data for both years saw their visitor numbers decrease (by 44% and 45% decrease respectively), but not as much as other categories. By comparison, museums/art galleries and railways/travel attractions saw their visitor numbers decrease by 83%.
- 1.46 Unsurprisingly, underground attractions saw the biggest year on year decrease in visitor numbers (81% decrease). As suggested earlier in the report, indoor attractions suffered more than outdoor attractions. Indoor attractions saw a 79% decrease in visitors in 2020 when compared to 2019, whilst outdoor attractions saw a 49% decrease.

Admission charges

- 1.47 In 2019, the average adult admission charge among responding attractions was £9.27, and in 2020 it was £9.32. When comparing charges for just the attractions which provided data for both years, so that a like for like comparison can be made, there was little change (1% decrease).
- 1.48 For average child admission charges, in 2019 this was £5.72 and in 2020 this was £6.16. Although when comparing charges for just the attractions which provided data for both years, there was also little change (3% decrease).
- 1.49 Average admission charges were highest for adventure/ activity attractions. In 2019, the average adult admission charge was £15.81, whilst in 2020 it was £16.10. The admission charge for children was also highest, at £14.32 in 2019 and £15.35 in 2020.
- 1.50 The average entry fee for railway/travel attractions was not too dissimilar to those from adventure/activity attractions. The average adult admission charge for railway/ travel attractions was £14.28 in 2019 and £15.58 in 2020. However, the average child entry fee for these attractions is significantly lower, at an average of £5.84 in 2019 and £6.82 in 2020.

Gross revenue movement

- 1.51 Nearly half (47%) of attractions reported a growth in revenue in 2018 compared to 2017 (results from previous survey).
- 1.52 However, growth slowed in 2019 with 52% of attractions reporting similar revenue to the previous year. When looking at results by venue type, 50% of outdoor attractions reported an increase in revenue in 2019, whilst only 25% of indoor attractions reported an increase in revenue. 47% of attractions which class themselves as both indoor and outdoor attractions also saw an increase in revenue.
- 1.53 Unsurprisingly, the vast majority (90%) of attractions reported a decrease in revenue in 2020. The results do not differ by venue type.

Employment in 2019 and 2020

- 1.54 In 2019, seasonal unpaid volunteers accounted for the largest proportion of workers (43%). However, in 2020 the number of seasonal unpaid volunteers reduced significantly to 21% of staff at attractions in Wales.
- 1.55 When looking at data just from attractions which were able to provide employment figures for both years, this shows that seasonal staff and volunteers fared worse than permanent staff. There was only a 6% decrease in full-time permanent staff amongst the attractions providing employment figures for both 2019 and 2020. Similarly, there was only a 1% decrease in part-time permanent staff. This compares to a 48% decrease in full-time seasonal staff and a 22% decrease in part-time seasonal staff.

- 1.56 However, seasonal unpaid volunteers appear to be impacted the most. There was a 57% decrease in the number of seasonal unpaid volunteers in 2020, and a 26% decrease in permanent unpaid volunteers.
- 1.57 Railway/travel attractions saw the largest overall decrease in the number of staff (including volunteers). These saw a 50% reduction in total staff in 2020 compared to 2019. These types of attractions typically rely volunteers to operate.

Origin of visitors for 2019 and 2020

- 1.58 Unsurprisingly, the proportion of visitors that were from overseas reduced from 10% in 2019 to 3% in 2020. The proportion of visitors that were from Wales increased from 47% in 2019 to 59% in 2020. This likely reflects the public's mindset to 'stay local', continuing with the message from Welsh Government earlier in the pandemic.

2. Introduction

Background

2.1 Visit Wales has been conducting the Survey of Visits to Tourist Attractions since 1973. The remit of the research is to:

- (1) Determine and report visit numbers to attractions throughout Wales.
- (2) Analyse collected data on visit numbers to identify current trends.
- (3) Provide additional comparative analysis of data contained in the survey including visit figures, operations, revenue, marketing and human resources.
- (4) Analyse data according to attraction categories, the four economic regions of Wales, and admission charging policy (free vs. paid).

Tourist attraction definition

2.2 The research uses the tourist attraction definition² agreed upon by the four National Tourist Boards for the 2001 survey whereby a tourist attraction is:

- (1) "...An attraction, where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances.

It must be open to the public without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from the visitors."

² This definition impacts on the Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for ... theatrical ... performances', which would exclude it from this research. The venue also does not neatly fall into the above classification as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the Wales Millennium Centre do not include theatre goers, or visitors whose main purpose of visit is associated with the theatre (e.g. ticket sales/collection etc.). For this reason, the Wales Millennium Centre is listed in the following pages, whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be considered when comparing with other entries.

Objectives

2.3 The purpose of this report is to monitor trends in the tourist attraction sector in Wales in order to provide a greater understanding of the sector to both industry and public sector organisations and to disseminate the findings in a useful and valuable way to the wider industry.

Postponement of the 2019 survey

- 2.4 The Survey of Visits to Tourist Attractions is conducted annually, and each year's survey asks for figures for the previous year. This is to ensure that attractions are able to provide their visitor figures by the time the survey is conducted.
- 2.5 The Survey of Visits to Tourist Attractions for 2019, due to be conducted in 2020, was postponed due to the COVID-19 pandemic. Many attractions were closed, meaning it was not possible to conduct the survey.
- 2.6 As a consequence of this, attractions were asked for their visitor data for 2019 and 2020 through one survey, conducted in 2021. Results for each year are reported on separately.

UK economic summary for 2019 and 2020

- 2.7 The UK experienced modest growth in 2019 of 1.4%, almost identical to the growth in GDP experienced in 2018 (1.3%)³. However, growth slowed to zero for the final three months of 2019. Forecasters felt the UK economy was dampened by slower global growth and Brexit-related uncertainties⁴.
- 2.8 The economies of the world came to an abrupt standstill in early 2020 as the COVID-19 pandemic struck. Overall, the UK economy contracted by 9.8% in 2020. Much of this contraction was in the first and second quarters of 2020. Q1 saw the economy contract by 2.7%, and Q2 by 19.6%. The economy picked up in Q3 by 17.4% as the economy partially reopened, although not enough to be back to pre-pandemic levels. The economy saw modest growth in Q4 of 1.1%.
- 2.9 Data from the COVID-19 U.K. Tourism Consumer Tracker Survey⁵ conducted between 31 August 2020 and 2 October 2020 (the most recent wave in 2020), shows that 15% of the Wales population regarded themselves as having been 'hit hard' financially by COVID-19, whilst 40% said that they were 'ok, but having to be careful'. 36% said they had not been affected and 9% said they were better off than before.
- 2.10 Data from the same survey also shows that the public were more comfortable conducting day to day activities that were outdoors compared to indoors. For example, 81% of the Welsh

³ Office for National Statistics: [GDP: Year on Year Growth](#)

⁴ Bank of England: [Monetary Policy Report - January 2020](#)

⁵ [COVID-19 UK Tourism Consumer Tracker Survey \(Wales profile\): 31 August to 2 October 2020](#)

public said that they were comfortable 'going for a walk in a country park/ local trail', whereas only 20% felt comfortable travelling by public transport. These comfort levels appear to mirror the types of visitor attractions that respondents said that they intended on visiting. Respondents said that they were more likely to visit 'gardens or country parks', and less likely to visit underground attractions, or indoor attractions.

COVID-19 timeline

- 2.11 The World Health Organization declared COVID-19 a pandemic on 11th March 2020. On 20th March 2020, the UK Prime Minister announced that the Government were "telling cafes, pubs, bars, restaurants to close tonight" as well as "nightclubs, theatres, cinemas, gyms and leisure centres". This escalated into a full lockdown on 23rd March 2020. The Prime Minister and First Ministers of Wales, Scotland and Northern Ireland made statements on this day (23rd March 2020) outlining the new measures. People were required to 'stay at home' and non-essential shops and community spaces closed.
- 2.12 On 29th May 2020, the First Minister of Wales announced that the 'stay at home' message in Wales was to change to 'stay local' from 1 June.
- 2.13 From 6th July 2020, outdoor visitor attractions were able to reopen.
- 2.14 On 11th July, tourist accommodation without shared facilities was allowed to reopen.
- 2.15 Shortly after this on 13th July, a number of services and businesses were allowed to reopen, including most indoor visitor attractions. However, businesses were still operating under social distancing guidelines. For businesses where the two metre social distancing was not possible, regulations required these businesses to put in place additional measures to minimise the risk of COVID-19 spreading, including minimising close face-to-face contact and maintain good hygiene standards.
- 2.16 Tourist accommodation without shared facilities was allowed to reopen on 25th July. Underground attractions were also allowed to reopen from this date.
- 2.17 Cases of coronavirus began to rise again in September following falling levels across the summer of 2020. A number of local authority lockdowns were implemented thereafter, with Caerphilly being the first local authority to be placed under 'local lockdown' on 7th September 2020. No person was allowed to leave a local authority area under lockdown without good reason, and no person was allowed to enter.
- 2.18 A two week 'firebreak' began on 23rd October and ended on 9th November. Welsh Government returned to the 'stay at home' message, and all non-essential businesses closed, including tourist attractions.
- 2.19 With COVID-19 cases again on the rise after the 'firebreak', and the outbreak of the new 'Delta' variant, new measures were brought into force on 4th December 2020. As part of these measures, indoor entertainment and visitor attractions were also ordered to close.

- 2.20 As cases continued to escalate, outdoor attractions were also ordered to close from 14th December.
- 2.21 Overall, outdoor attractions were allowed to open for approximately 31 weeks of the year, whilst indoor attractions were allowed to be open for approximately 29 weeks, and underground attractions for approximately 27 weeks.

UK visitor figures for 2019 and 2020

- 2.22 There were 40.9 million inbound visits to the UK in 2019, 1% up on visits for 2018⁶. 2019 also saw a 6.8% increase in overnight trips to Wales by GB residents, to 10.7 million trips⁷. The number of trips taken in Wales by international visitors also rose, by 3.6% to just over one million visits (1,023,000). However, the number of day visits to destinations in Wales fell by 8.8% and related spend was down 14%.
- 2.23 The UK received 11.1 million inbound visits in 2020, a 73% decline from 2019. The majority (63%) of visits were in the first quarter before worldwide travel restrictions were put in place. The decline in Q1 was 16%, whereas this grew to a 96% decline in Q2. Q3 was down by 80% and Q4 by 87%.
- 2.24 Further data on visits for 2020 is unavailable due to the COVID-19 pandemic. However, the COVID-19 Tourism Consumer Tracker Survey⁸ shows that in both January and February 2020, when attractions were open, 6% of the UK population visited an indoor attraction. This compares to only 4% in August and September, typically some of the busiest months for attractions, and only 1% in December.

Climatic summary for 2019 and 2020

- 2.25 2019 was warmer than average for the UK, although not as warm as 2018 and 2017. There were record-breaking warm spells in February and July, and record-breaking warmth for both the Easter and late-August bank holiday weekends, which will undoubtedly have helped visitor attractions. However, it was a rather wet year, with above average rainfall in March and then most months from June onwards. There were a series of heavy-rainfall events in February, March, April and June, and numerous incidences of flooding from the end of July onwards.
- 2.26 2020 was also warmer than average for the UK, and ranks as the third warmest year in a series from 1884. There were several short hot spells, including the Easter bank holiday weekend, although this will have had little to no effect on attractions as they were closed. Nevertheless, there were also several hot spells during the summer. Temperatures exceeded

⁶ [Visit Britain 2019 Snapshot](#)

⁷ [Welsh Government: Wales Tourism Performance Report 2019](#)

⁸ [COVID-19 UK Tourism Consumer Tracker Survey](#)

30°C in parts of the UK on 13 days during the summer, including one final hot day on 15 September. However, just like 2019, 2020 was also a rather wet year, with the wettest February on record, and all summer months being wetter than average. October and December were also notably wetter than average.

3. Methodology

Conducting the research

- 3.1 Fieldwork for the 2019 & 2020 survey began in February 2021 and closed in September 2021. Given the difficulties surrounding COVID-19, some attractions needed longer than normal to complete the survey.
- 3.2 Before fieldwork began, the database of attractions was updated to include new attractions.
- 3.3 A link to the survey was sent by email to attractions on 4th February 2021. This was followed by three reminder emails, and then telephone follow-ups for those who did not respond to the emails. Visit Wales assisted with further targeted reminders to major attractions in August and September. The survey closed on 13th September.
- 3.4 Organisations with a large number of attractions were invited to complete a spreadsheet rather than an online survey for each of their sites. These organisations included Amgueddfa Cymru – National Museum Wales, Cadw, Dŵr Cymru Welsh Water, National Trust, Natural Resources Wales and RSPB Cymru. These organisations were able to provide data for 64 attractions, out of a total of 89 attractions for which data was requested.
- 3.5 The questionnaire was based on the questionnaire used in previous years to ensure comparability between different years. A few additional questions were asked surrounding the COVID-19 pandemic. The survey and all survey materials were available in English and Welsh.

Depth interviews

- 3.6 15 depth interviews were also conducted with attractions in August and September 2021. The depth interviews sought to explore some of the topics which were emerging from the initial data, and to get an up to date picture of how attractions are faring currently due to the COVID-19 pandemic.
- 3.7 Attractions were asked:
 - (1) How they collate visitor figures and how they estimate their proportion of visitors who are adults or children, and the proportion who are from Wales, rest of the UK, or overseas.
 - (2) Whether the pandemic has changed their entry prices, digital offering, the way they operate, difficulties in retaining volunteers, and plans for 2022.

Response rate

3.8 A total of 569 attractions⁹ believed to fit the tourist definition were invited to take part. The response rate for this year and earlier years are given in Table 3.1 below.

Table 3.1 Response rate

Response rates	2020	2019	2018	2017	2016**	2014
Total attractions contacted	569	569	570	571	609	478
Attractions completing the survey	260* 46%	299 53%	248 44%	237 42%	216 35%	146 30%
Attractions responded but unable to provide figures***	73 13%	34 6%	20 4%	1 0.2%	N/A	9 2%
TOTAL RESPONSE RATE	333 59%	333 59%	268 47%	238 42%	216 35%	155 32%

* Attractions which were closed in 2020 have been included in the proportion completing the survey, as they provided partial data despite not being open for visitors due to the COVID-19 pandemic.

** A limited survey was conducted in-house by Visit Wales in 2015, so no comparable data is available for this year.

*** Prior to the 2019 and 2020 survey, this row included attractions which responded to say that they were closed.

3.9 The total response rate to the 2019 and 2020 survey was 59% – higher than in previous years. 53% of attractions contacted were able to provide data for 2019 and 46% were able to provide data for 2020.

3.10 Anecdotal feedback suggests that some attractions did not collect figures as normal in 2020, or had not worked out their visitor numbers for 2020 yet, or did not have access to this information.

Recording method for visitor numbers

3.11 In order to assess the reliability of visitor figures provided by attractions, attractions were asked how they work out their visitor figures. The results are shown in Table 3.2 below.

3.12 The figures amount to more than 100% as multiple methods are mentioned by some attractions. Results from the 2018 survey have been added for comparison.

⁹ This includes 480 individual attractions plus organisations accounting for many tourist attractions in Wales contacted separately, which provided data for 89 attractions.

Table 3.2 Recording method for visitor numbers

Recording method	No. (2018)	% (2018)	No. (2019)	% (2019)	No. (2020)	% (2020)
From ticket sales and/or group booking sales	85	36%	140	47%	109	49%
Mechanical or electronic method of counting (e.g. turnstile)	60	26%	97	32%	58	26%
Manual method of counting numbers	55	24%	72	24%	46	21%
Estimate only	21	9%	51	17%	36	16%
Estimate only on the basis of sample count	12	5%	10	3%	7	3%
Other	25	11%	18	6%	14	6%

Base: Attractions providing data on counting methods (233 – 2018, 299 – 2019, 221 - 2020)

3.13 The proportion basing their 2019 or 2020 visitor figures on ‘estimates only’ is higher than in previous years. However, this may be due to the increase in smaller, individual attractions completing the survey, who may be more likely to rely on estimates than larger attractions.

3.14 A few of those interviewed for the in-depth interviews said that they did not have access to the information they would usually have. The reasons for which were varied and depended on the attraction, but reasons given include:

- (1) The attraction did not collect visitor figures in 2020 as they usually would, including outdoor attractions which would usually have based their numbers on visitors to their visitor centre, but the centre was closed in 2020.
- (2) Visitor figures were not completed for 2019 or 2020 due to the pandemic, so estimates have been based on whether the representative felt visits increased or decreased based on data they have for 2018.
- (3) Not having access to the data as they usually would. Either because the attraction was/ is still closed, so the attraction representative cannot access the data, or the staff member who normally deals with such issues is on furlough.

3.15 Recording methods for 2019 and 2020 are very similar, although the percentage of attractions recording visitor numbers through mechanical or electronic methods decreased. This is due to one of the larger organisations, which account for multiple attractions, temporarily changing the way they count figures for 2020 whilst they move to a new IT system.

3.16 ‘Other’ methods for recording visitor numbers include café, tearoom or shop sales, review of a visitor book, and honesty boxes. These represent very small attractions.

Notes on the report

- 3.17 This report focuses on visitor figures for 2019 and 2020. However, comparisons have been made with data from 2018 where it was felt beneficial to do so.
- 3.18 Throughout the report, samples of ten or below are highlighted in red and shown in italics to denote the need for caution to be applied when interpreting the results. The data has been analysed by region, ownership, category, and by other variables if results have been worthy of additional analysis, and if the sample size allows.
- 3.19 The figures in this report represent attractions which completed the survey, and not all attractions across Wales. However, the vast majority of major attractions in Wales completed the survey, and a high response rate was achieved. Therefore, the survey should provide an accurate indication of trends in the sector.
- 3.20 The base (sample size) can fluctuate between different questions, particularly for 2020 data. Some attractions were not able to answer all parts of the survey relating to 2020.
- 3.21 It is important to note that some of the differences between the top ten free and paid attractions are because a few attractions were not able to provide visitor figures for 2020.

4. Proportion of attractions open in 2019 and 2020

- 4.1 Table 4.1 below shows the proportion of attractions that were open each month.
- 4.2 A relatively similar proportion of attractions were open in January and February for both years. However, as the pandemic took hold in March 2020, fewer attractions were open. In March 2019, 80% of the attractions providing data were open, whereas this reduced to 57% for March 2020.
- 4.3 In April and May 2020, 3% of attractions providing data were open. Attractions were not allowed to open at this time, but these attractions represent outdoor attractions providing public access for exercise.
- 4.4 The proportion of attractions that were open increased to 60% by September – the highest proportion that were open in 2020 since the pandemic began. However, the proportion of attractions that were open began to fall after September, and in December 2020, only 26% of attractions were open.
- 4.5 15% of attractions responding to the survey were closed throughout 2020, whilst 18% of attractions opened at some point between January and March but then remained closed for the rest of the year. Therefore, a third (33%) were not open at all between April and December 2020.

Table 4.1 Proportion of attractions open by month

Month	% open in month 2019	% open in month 2020
January	69%	62%
February	74%	67%
March	80%	57%
April	95%	3%
May	96%	3%
June	97%	5%
July	98%	33%
August	97%	53%
September	97%	60%
October	92%	48%
November	76%	34%
December	74%	26%
Closed all year	N/A	15%

Base: attractions providing data for 2019 (299) and 2020 (260); including attractions that were closed all year in 2020

- 4.6 Table 4.2 below shows the proportion of attractions that were open each month in 2020 by venue type.
- 4.7 Attractions are categorised by their venue type – indoor, outdoor, both indoor and outdoor, or underground. Some attractions do not neatly fall into one category. For example, many attractions have both indoor and outdoor areas but are predominantly an indoor or an outdoor attraction. Nevertheless, the results for purely indoor and purely outdoor attractions shows the difference in the proportion of indoor and outdoor attractions that were open each month.
- 4.8 In August 2020 – typically one of the busiest months for attractions, only 34% of indoor attractions were open, whereas a significantly higher proportion of outdoor attractions were open (73%).

Table 4.2 Venue types open by month in 2020

Month	Indoor	Outdoor	Both - indoor and outdoor	Underground
January	70%	60%	55%	50%
February	71%	69%	64%	50%
March	57%	56%	57%	50%
April	0%	10%	2%	0%
May	1%	8%	4%	0%
June	2%	10%	6%	0%
July	16%	54%	37%	50%
August	34%	73%	62%	50%
September	45%	69%	68%	67%
October	32%	56%	58%	33%
November	27%	40%	39%	17%
December	14%	38%	33%	0%
Closed all year	17%	10%	15%	33%

Base: Attractions providing data for 2020: indoor (96), outdoor (48), both (110), underground (6)

Caution: Small sample sizes for underground attractions

4.9 Attractions were asked whether they chose to close at any point, at a time that they would normally have been open, and were allowed to open. Over half (57%) of attractions said that they chose to stay open whenever they were allowed to do so. 38% said they chose to close at some point because of COVID-19, even though they were allowed to reopen, and 5% said they chose to close, even when they were allowed to reopen, but for reasons unrelated to COVID-19.

Operating capacity during the pandemic

4.10 Attractions that were open at any point between March and December 2020 were asked at what percentage of their normal capacity level they were operating at, on average, when open during this time.

4.11 One in ten attractions (10%) were operating at less than 20% of their normal capacity level, whilst just under half (46%) were operating between 20% and 49% of their normal capacity level. 28% were operating between 50% and 79% of their normal capacity level, and 7% were operating between 80% and 99% of their normal capacity level. Around one in ten (9%) attractions were open at full capacity.

Table 4.3 Operating capacity during the pandemic

Average capacity level	%
Open at full capacity	9%
90 - 99%	1%
80 - 89%	6%
70 - 79%	5%
60 - 69%	9%
50 - 59%	14%
40 - 49%	14%
30 - 39%	18%
20 - 29%	14%
10 - 19%	5%
Less than 10%	5%

Base: attractions providing data (154)

- 4.12 The proportion of indoor and outdoor attractions that were operating at full capacity is similar (12% and 13% respectively). However, the proportion of indoor attractions operating at less than half of capacity was 64%, whereas only 27% of outdoor attractions were operating at less than half of capacity.
- 4.13 Throughout 2020, the Tourism Barometer Coronavirus impact survey¹⁰ showed that performance of tourism businesses correlated strongly to their operating capacity.

¹⁰ [Tourism Barometer \(Coronavirus \(COVID-19\) impact survey\): wave 5 2020](#)

5. Top ten free and paid attractions

Top ten paid attractions 2019

- 5.1 The paid attraction reporting the highest number of visitors in 2019, as in previous years, was the LC Waterpark and Leisure Complex in Swansea (678,714 visitors). This is despite a 12% fall in visitors in 2019 from 2018. The top four paid attractions are the same as in 2018, and in roughly the same order, with Cardiff Castle becoming the second most visited paid attraction for 2019 (previously third), and Folly Farm becoming the third most visited paid attraction (previously second).
- 5.2 Two attractions feature in the top ten which did not feature in 2018. These are Portmeirion and the Ffestiniog and Welsh Highland Railways. Both of these are new entries to the survey, and did not complete the survey in 2018. Zip World Slate Caverns and Nova Prestatyn fall out of the top 10 from 2018. Both of these fall out of the top ten due to a decrease in visitor numbers in 2019. Seven of the top ten paid attractions are in North Wales, and four of the top ten are privately owned.
- 5.3 The top ten paid attractions for 2019 received approximately 3.1 million visitors – more or less the same as in 2018 (3.2 million). This accounts for 33% of all visits made to paid attractions.
- 5.4 Estimated visitor numbers may be based on firm data held by attractions or samples of visitor numbers, though some, including some top ten attractions in both 2019 and 2020, are based on estimates only.

Table 5.1 Top ten paid attractions 2019

	Name	Region	Owner	Category	No. of visits 2018	No. of visits 2019	% change	£ Adult
1	LC Waterpark and Leisure Complex Swansea	SW	PO	Theme	772,000	678,714*	-12%	£8.00
2	Cardiff Castle	SE	LA/NP	HP	452,007	502,224*	+11%	£13.50
3	Folly Farm	SW	PO	Farm	455,428	438,234	-4%	£16.50
4	Bodnant Garden	N	NT	CP	260,153	271,339	+4%	£15.40
5	Portmeirion	N	PO	HP	N/A	245,690	N/A	£13.00
6	Zip World Forest	N	PO	A/A	195,000*	223,500*	+15%	£25.00
7	Conwy Castle	N	Cadw	HP	201,961	212,364	+5%	£9.90
8	Caernarfon Castle	N	Cadw	HP	205,009	199,074	-3%	£9.90
9	Great Orme Tramway	N	LA/NP	R/T	191,613*	190,227	-1%	£8.10
10	Ffestiniog and Welsh Highland Railways	N	LA/NP	R/T	N/A	186,205	N/A	£43.00

As noted earlier, visitor figures denoted with an asterisk (*) represent estimated visitor figures.

Top ten paid attractions 2020

- 5.5 The paid attraction reporting the highest number of visitors in 2020 was Folly Farm (203,073 visitors). The top six paid attractions for 2020 were also in the top six paid attractions for 2019, but not necessarily in the same order.
- 5.6 Welsh Mountain Zoo, The National Botanic Garden of Wales, Zip World Penrhyn Quarry, and Dyffryn Gardens enter the top ten paid attractions for 2020.
- 5.7 Two Cadw properties fall out of the top ten paid attractions for 2020 – Conwy Castle (35,553 visitors) and Caernarfon Castle (25,321 visitors). Ffestiniog and Welsh Highland Railways (no figures available for 2020) and the Great Orme Tramway (closed all year) also fall out.
- 5.8 Of the top ten paid attractions, LC Waterpark and Leisure Complex Swansea saw the largest decrease in visitors in 2020 (-73% change from 2019). The top ten paid attractions for 2020 received approximately 1.3 million visitors. This accounts for 51% of all visits made to the paid attractions which completed the survey. This is an increase from 2019 (33%), which may suggest that smaller attractions suffered more in terms of visitor numbers.

Table 5.2 Top ten paid attractions 2020

	Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	% change	£ Adult
1	Folly Farm	SW	PO	Farm	438,234	203,073	-54%	£16.95
2	Cardiff Castle	SE	LA/NP	HP	502,224*	195,930	-61%	£13.50
3	LC Waterpark and Leisure Complex Swansea	SW	PO	Theme	678,714*	185,312*	-73%	£8.00
4	Portmeirion	N	PO	HP	245,690	128,596	-48%	£13.00
5	Zip World Forest	N	PO	A/A	223,500*	121,035*	-46%	£25.00
6	Bodnant Garden	N	NT	CP	271,339	106,728	-61%	£8.00
7	Welsh Mountain Zoo	N	PO	WL	163,299	97,770	-40%	£13.75
8	The National Botanic Garden of Wales	SW	PO	CP	163,096	91,610	-44%	£11.50
9	Zip World Penrhyn Quarry	N	PO	A/A	145,000*	80,600*	-44%	£99.00
10	Dyffryn Gardens	SE	NT	CP	167,389	79,723	-52%	NP ¹¹

As noted earlier, visitor figures denoted with an asterisk (*) represent estimated visitor figures.

Top ten free attractions 2019

- 5.9 Of the free admittance attractions providing data for 2019, the Wales Millennium Centre received the highest number of visitors (1,142,706). This is despite a 35% fall in visitors

¹¹ Not provided (NP)

compared to 2018, although the number of visitors for 2019 is in line with the number of visitors for 2017 (1,082,494).

- 5.10 The top seven free attractions for 2019 are the same as those for 2018, and in more or less the same order.
- 5.11 Two of the top free attractions for 2018 – Newborough National Nature Reserve and Gwydir Forest Park, were unable to complete the 2019 survey (previously the eighth and ninth most visited free attractions in 2018). Llandegfedd Visitor Centre and the National Waterfront Museum enter the top ten, whilst Pontcysyllte Aqueduct & Trevor Basin Visitor Centre was already in the top ten in 2018.
- 5.12 The top ten free attractions for 2019 received approximately 6.3 million visitors – similar to 2018 (6.7 million visitors). This accounts for 50% of all visits made to free attractions (the same as in 2018).

Table 5.3 Top ten free attractions 2019

	Name	Region	Owner	Category	No. of visits 2018	No. of visits 2019	% change
1	Wales Millennium Centre ¹²	SE	PO	MAG	1,762,281*	1,142,706*	-35%
2	Tir Prince Fun Park	N	PO	Theme	900,000*	1,000,000*	+11%
3	St Fagans National Museum of History	SE	AC-NMW	MAG	636,859	746,105	+17%
4	Aberystwyth Arts Centre	M	PO	MAG	600,000*	658,088	+10%
5	Pembrey Country Park	SW	LA/NP	CP	520,000*	611,114	+18%
6	Walkers on Snowdon ¹³	N	LA/NP	WL	557,991	590,984	+6%
7	National Museum Cardiff	SE	AC-NMW	MAG	488,809	584,256	+20%
8	Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	N	PO	HP	342,620	410,041*	+20%
9	Llandegfedd Visitor Centre	SE	DCWW	WL	188,720*	285,029	+51%
10	National Waterfront Museum Swansea	SW	AC-NMW	MAG	285,340	275,242	-4%

As noted earlier, visitor figures denoted with an asterisk (*) represent estimated visitor figures.

¹² The Wales Millennium Centre, which could be categorised as ‘a retail outlet or a venue for ... theatrical ... performances’, does not neatly fall into the classification of an attraction, as it is not strictly ‘a single business, under a single management’ but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the Wales Millennium Centre do not include theatre goers, or visitors whose main purpose of visit is associated with the theatre (e.g., ticket sales/collection etc.). For this reason, the Millennium Centre is listed in this report, whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be considered when comparing with other entries.

¹³ Data in the previous report for 2018 was based on estimates provided by the Snowdon Visit Centre. Figures for 2019 have been provided by Snowdonia National Park. The results for 2018 in this report are based on figures from Snowdonia National Park, so that like for like comparisons can be made.

Top ten free attractions 2020

- 5.13 Of the free admittance attractions providing data for 2020, Pembrey Country Park accounted for the highest number of visitors (405,444). This is despite a 34% decrease in visitors compared to 2019. The top free attraction from 2019 – Wales Millennium Centre, received an 82% decrease in visitors in 2020.
- 5.14 Four attractions enter the top ten. These are: Alyn Waters Country Park, Cosmeston Lakes Country Park, Stackpole Nature Reserve and Ynys Las National Nature Reserve.
- 5.15 Restrictions on outdoor attractions eased before indoor attractions. It is no surprise that these types of attractions feature more prominently in the top 10 free attractions for 2020.
- 5.16 St Fagans National Museum of History (112,379 visitors), Aberystwyth Arts Centre (55,580 visitors) and National Waterfront Museum Swansea (52,672) fall out of the top ten for 2020. Tir Prince Fun Park (the second most visited free attraction in 2019) was unable to provide figures for 2020.
- 5.17 The Wales Millennium Centre saw the largest decrease in visitors (82% decrease), followed by National Museum Cardiff (78% decrease). The top ten free attractions for 2020 received approximately 2.2 million visitors. This accounts for 60% of all visits made to free attractions. This is an increase from 2019 (50%), again suggesting that smaller attractions may have fared worse compared to larger attractions.

Table 5.4 Top ten free attractions 2020

	Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	% change
1	Pembrey Country Park	SW	LA/NP	CP	611,114	405,444	-34%
2	Walkers on Snowdon	N	LA/NP	WL	590,984	329,258	-44%
3	Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	N	PO	HP	410,041*	275,336*	-33%
4	Alyn Waters Country Park	N	LA/NP	CP	258,764*	258,764*	0%
5	Wales Millennium Centre	SE	PO	MAG	1,142,706*	203,552*	-82%
6	Llandegfedd Visitor Centre	SE	DCWW	WL	285,029	180,779	-37%
7	Cosmeston Lakes Country Park	SE	LA/NP	CP	250,000*	150,000*	-40%
8	National Museum Cardiff	SE	AC-NMW	MAG	584,256	130,563	-78%
9	Stackpole Nature Reserve	SW	NT	WL	256,746	129,753	-49%
10	Ynys Las National Nature Reserve	M	NRW	WL	126,111	120,000*	-40%

As noted earlier, visitor figures denoted with an asterisk (*) represent estimated visitor figures.

6. Visits 2019 & 2020

- 6.1 This section presents an analysis of the visits data for 2019 and 2020. Please note, not all base sizes are the same, as not all respondents completed all sections of the questionnaire across both years. Those not completing the relevant sections have been omitted from the tables but included elsewhere in sections where they have provided data.
- 6.2 In this section, data for 2019 and 2020 is often displayed in the same table. Whilst reasonable comparisons can be made, Section 7 analyses results from attractions which provided data for both 2019 and 2020, so that like for like comparisons can be made. Please be aware that data and samples for both sections are often slightly different.

Overall visits for 2019 and 2020

- 6.3 Approximately 22.3 million visits were made to attractions which provided data for 2019, whilst approximately 6.2 million visits were made to attractions which provided data for 2020.
- 6.4 The top 25 attractions in 2019 accounted for almost half of all visits recorded in 2019 (49% of visits, and 10,838,139 visits overall). In 2020, the top 25 attractions accounted for 64% of visits (3,950,766 visits overall).

Overall visits by admission type

- 6.5 The share of visits to free and paid attractions is almost identical for 2019 and 2020. In 2019, 57% of visits were to free attractions and in 2020, 59% of visits were to free attractions. Similarly, in 2019 43% of visits were to paid attractions and in 2020 41% of visits were to paid attractions. These figures are also similar to 2018 (61% of visits were to free attractions and 39% of visits were to paid attractions).

Table 6.1 Overall visits by admission type

Admission type	Base 2019	% of attractions 2019	No. of visits 2019	% of visits 2019	Base 2020	% of attractions 2020	No. of visits 2020	% of visits 2020
Free	126	42%	12,702,217	57%	95	43%	3,623,235	59%
Paid	173	58%	9,617,123	43%	126	57%	2,545,803	41%
Total	299	100%	22,319,340	100%	221	100%	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Overall visits by region for 2019 & 2020

- 6.6 Participating attractions in North Wales and South East Wales received the highest share of visits in 2019 (38% and 30% respectively) and in 2020 (37% and 29%).
- 6.7 Both of these regions also accounted for a higher proportion of visits in 2019, and in 2020, than their proportion of attractions. For example, the proportion of attractions completing the survey from North Wales was 33% for 2020, but these attractions accounted for 37% of visits in 2020.
- 6.8 Visits to attractions in Mid Wales and South West Wales accounted for fewer than their proportion of attractions for 2019, whilst this was also the case for visits to attractions in Mid Wales for 2020, as shown in Table 6.2 below.
- 6.9 The percentage of visits to attractions in each region is similar for both 2019 and 2020, suggesting that attractions from all regions were evenly hit by the pandemic.
- 6.10 The percentage of visits by region is also similar to the figures from 2018. In 2018, 10% of visits were to attractions in Mid Wales, 40% of visits were to attractions in North Wales, 30% to attractions in South East Wales, and 21% to attractions in South West Wales.

Table 6.2 Overall visits by region for 2019 & 2020

Region	Base 2019	% of attractions 2019	No. of visits 2019	% of visits 2019	Base 2020	% of attractions 2020	No. of visits 2020	% of visits 2020
Mid	52	17%	2,395,503	11%	41	19%	647,184	10%
North	100	33%	8,521,679	38%	73	33%	2,287,654	37%
South East	73	24%	6,723,297	30%	59	27%	1,799,472	29%
South West	74	25%	4,678,861	21%	48	22%	1,434,728	23%
Total	299	100%	22,319,340	100%	221	100%	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Average visits by region for 2019 & 2020

- 6.11 The average number of visits per attraction for 2019 (74,647) was lower than the average number of visits in 2018 (89,610). This may be due to the increase in the response rate in 2019 compared to 2018, as more smaller attractions completed the survey.
- 6.12 The average number of visits for 2020 (27,914), shown in table 6.3 below, demonstrates the effect the COVID-19 pandemic had on attractions in 2020.
- 6.13 The average number of visits to attractions in Mid Wales for 2019 and 2020 (46,067 and 15,785 respectively) is lower than the average number of visits to attractions in other regions. This suggests that there are a greater proportion of smaller attractions in Mid Wales.

6.14 The change in the average number of visitors for 2020 in each region is relatively similar, although the change was less severe for South West Wales which saw a 53% decrease in the number of average visitors per attraction. Although this is still a dramatic decrease.

Table 6.3 Average visits by region for 2019 & 2020

Region	Base 2019	Average visits per attraction 2019	Base 2020	Average visits per attraction 2020	% change
Mid	52	46,067	41	15,785	-66%
North	100	85,217	73	31,338	-63%
South East	73	92,100	59	30,500	-67%
South West	74	63,228	48	29,890	-53%
Total	299	74,647	221	27,914	-63%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Overall visits by attraction category for 2019 & 2020

- 6.15 The most visited types of attractions in 2018 were museums/art galleries (25%). Visits to museums/art galleries accounted for more or less the same proportion of all visits to attractions in 2019 (26%). The majority of these were to free attractions. Visits to free museums/art galleries account for 24% of all visits in 2019.
- 6.16 Visits to Museums/art galleries only accounted for 15% of all visits to attractions 2020, despite these types of attraction accounting for 27% of the sample.
- 6.17 In 2018, visits to wildlife/nature reserves and country parks/gardens accounted in total for 32% of visits to attractions. In 2019, these two categories accounted for a similar proportion of visits – 26%. However in 2020, they accounted for nearly half (45%) of visits to attractions.
- 6.18 This suggests that outdoor attractions were not hit as badly as indoor attractions, which is to be expected as they were able to open earlier and there would have been less risk attached to visiting outdoor attractions. This is examined further overleaf.

Table 6.4 Overall visits by attraction category for 2019 & 2020

Attraction category	Base 2019	% of attractions 2019	No. of visits 2019	% of visits 2019	Base 2020	% of attractions 2020	No. of visits 2020	% of visits 2020
Adventure/ activity attraction	30	10%	1,832,741	8%	25	11%	653,002	11%
Country park/ garden	28	9%	2,824,701	13%	22	10%	1,336,478	22%
Farm/ rare breeds	7	2%	589,811	3%	6	3%	258,208	4%
Food or drink attraction	15	5%	210,054	1%	11	5%	48,188	1%
Historic property	67	22%	4,501,615	20%	50	23%	1,098,385	18%
Industrial/ craft attraction	12	4%	244,728	1%	9	4%	45,379	1%
Museum/ art gallery	83	28%	5,762,758	26%	59	27%	952,026	15%
Railway/ travel	20	7%	1,183,513	5%	12	5%	130,991	2%
Science/ technology centre	3	1%	167,219	1%	2	1%	27,759	0%
Theme park/ leisure	3	1%	1,828,714	8%	1	0%	185,312	3%
Wildlife or nature reserve	26	9%	2,931,717	13%	19	9%	1,394,557	23%
Other attraction	5	2%	241,769	1%	5	2%	38,753	1%
Total	299	100%	22,319,340	100%	221	100%	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Caution: Small sample sizes

Average visits by attraction category for 2019 & 2020

- 6.19 The average number of visits by attraction category also shows that country parks/gardens and wildlife/nature reserves were not as badly hit as other attraction categories. The average number of visitors for country parks/gardens fell by 40% in 2020, whilst the average number of visitors for wildlife/nature reserves fell by 35%. This compares to a 63% decrease in the overall average number of visitors per attraction.
- 6.20 Railway/travel attractions saw the largest year on year decrease in average visitor numbers (82% decrease). This is to be expected given that attractions where visitors are typically close together will have suffered as a result of social distancing measures. Similarly, some museums/art galleries required pre-booking, to limit the number of visitors at a time (to ensure social distancing), so it is no surprise that these types of attractions saw a 77% decrease in average visitors per attraction.

Table 6.5 Average visits by attraction category for 2019 & 2020

Attraction category	Base 2019	Average no. of visits 2019	Base 2020	Average no. of visits 2020	% change
Adventure/ activity attraction	30	61,091	25	26,120	-57%
Country park/ garden	28	100,882	22	60,749	-40%
Farm/ rare breeds	7	84,259	6	43,035	-49%
Food or drink attraction	15	14,004	11	4,381	-69%
Historic property	67	67,188	50	21,968	-67%
Industrial/ craft attraction	12	20,394	9	5,042	-75%
Museum/ art gallery	83	69,431	59	16,136	-77%
Railway/ travel	20	59,176	12	10,916	-82%
Science/ technology centre	3	55,740	2	13,880	-75%
Theme park/ leisure	3	609,571	1	185,312	-70%
Wildlife or nature reserve	26	112,758	19	73,398	-35%
Other attraction	5	48,354	5	7,751	-84%
Total	299	74,647	221	27,914	-63%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Caution: Small sample sizes

Overall visits by venue type for 2019 & 2020

6.21 Data for indoor and outdoor attractions shows the changing visitor trend for 2020.

6.22 Indoor attractions accounted for 30% of visits in 2019, but only 20% in 2020, whilst outdoor attractions accounted for 23% of visits in 2019, but this increased to 38% in 2020.

Table 6.6 Overall visits by venue type for 2019 & 2020

Attraction category	Base 2019	% of attractions 2019	No. of visits 2019	% of visits 2019	Base 2020	% of attractions 2020	No. of visits 2020	% of visits 2020
Indoor	114	38%	6,747,031	30%	80	36%	1,224,527	20%
Outdoor	57	19%	5,234,728	23%	43	19%	2,343,340	38%
Both - indoor and outdoor	122	41%	9,832,766	44%	94	43%	2,503,228	41%
Underground	6	2%	504,815	2%	4	2%	97,943	2%
Total	299	100%	22,319,340	100%	221	100%	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Caution: Small sample sizes (for underground attractions)

Overall visits by ownership for 2019 & 2020

- 6.23 Privately owned attractions received the highest share of visits in 2019 and 2020 (48% and 43% respectively). This is slightly lower than the proportion of private owned attractions in the sample for both years (61% and 59% respectively).
- 6.24 Attractions owned by local authorities or national parks received a higher proportion of visits than their share in the sample. These attractions accounted for 22% of visits in 2019 but their share in the sample was only 17%, and in 2020 they accounted for 27% of visits but their share in the sample was only 16%.
- 6.25 Amgueddfa Cymru – National Museum Wales also received a higher proportion of visits than their share in the sample for 2019. Their attractions accounted for only 2% of attractions in 2019, but 9% of the total visits for that year. In 2020, their proportion of visits (6%) was more similar to their proportion in the sample (3%).
- 6.26 The proportion of visits for the remaining ownership types were relatively similar to their proportion in the sample.

Table 6.7 Overall visits by ownership for 2019 & 2020

Region	Base 2019	% of attractions 2019	Number of visits 2019	% of visits 2019	Base 2020	% of attractions 2020	Number of visits 2020	% of visits 2020
Cadw	24	8%	1,234,199	6%	19	9%	197,331	3%
Local Authority / National Park	52	17%	4,830,702	22%	36	16%	1,687,645	27%
Amgueddfa Cymru - National Museum Wales	7	2%	1,951,792	9%	7	3%	349,264	6%
The National Trust	21	7%	1,973,980	9%	18	8%	487,917	8%
Natural Resources Wales**	5	2%	541,286	2%	3	1%	256,000	4%
Private owner / trust	183	61%	10,756,866	48%	131	59%	2,642,237	43%
RSPB	4	1%	389,240	2%	4	2%	171,641	3%
Dŵr Cymru Welsh Water	3	1%	641,275	3%	3	1%	377,003	6%
Total	299	100%	22,319,340	100%	221	100%	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Please note that some organisations were only able to provide data for a few of their sites.

**Natural Resources Wales were only able to provide data for 5 of their 29 sites.

Average visits by ownership for 2019 & 2020

- 6.27 The average number of visitors per attraction fell significantly for some of the larger organisations, such as Cadw, Amgueddfa Cymru – National Museum Wales and the National Trust. The average number of visits per Cadw site decreased from 51,425 in 2019 to 10,386 in 2020, an 80% decrease. Amgueddfa Cymru – National Museum Wales had an average of 278,827 visitors per site in 2019, but this fell to 49,895 per site in 2020, an 82% decrease. National Trust had an average of 93,999 visitors per site in 2019, but this fell to 27,107 in 2020, a 71% decrease.
- 6.28 This could be because these attractions were significantly impacted by social distancing requirements. For example, to accommodate social distancing, many of these organisations placed a cap on the number of visitors their attractions could accommodate at any time. Whilst some of their attractions may have sold out at peak times, the number of visitors they could accommodate was well below pre-pandemic levels. These attractions would also usually receive a significant number of school trips throughout the year.

Table 6.8 Average visits by ownership for 2019 & 2020

Attraction category	Base 2019	Average no. of visits 2019	Base 2020	Average no. of visits 2020	% change
Cadw	24	51,425	19	10,386	-80%
Local Authority / National Park	52	92,898	36	46,879	-50%
Amgueddfa Cymru - National Museum Wales	7	278,827	7	49,895	-82%
The National Trust	21	93,999	18	27,107	-71%
Natural Resources Wales**	5	108,257	3	85,333	-21%
Private owner / trust	183	58,781	131	20,170	-66%
RSPB	4	97,310	4	42,910	-56%
Dŵr Cymru Welsh Water	3	213,758	3	125,668	-41%
Total	299	74,647	221	27,914	-63%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221)

Please note that some organisations were only able to provide data for a few of their sites.

Natural Resources Wales were only able to provide data for 5 of their 29 sites for 2019, and 3 of their sites for 2020.

Overall visits by range of visits

- 6.29 As shown in table 6.9 below, 24 attractions reported that they received 200,000 or more visitors in 2019. The visits to these 24 attractions represented almost half (48%) of visits to all attractions in 2019. This is similar to 2018 where 23 attractions reported 200,000 visitors or more, representing 49% of total visits in 2018.

- 6.30 Of the 24 attractions which reported 200,000 visitors or more in 2019, 17 of them did not charge for admission. These 17 free attractions represent 36% of all visits in 2019.
- 6.31 Only six attractions reported 200,000 or more visitors for 2020. On the other end of the scale, 30 attractions reported fewer than 2,000 visitors in 2019, but this doubled to 61 in 2020.

Table 6.9 Overall visits by range of visits

Range of total visits	Base 2019	No. of visits 2019	% of visits 2019	Base 2020	No. of visits 2020	% of visits 2020
0 - 1,999	30	30,376	0%	61	35,662	1%
2,000 - 4,999	29	98,264	0%	33	106,620	2%
5,000 - 9,999	31	208,044	1%	31	226,600	4%
10,000 - 19,999	39	556,557	2%	40	581,030	9%
20,000 - 49,999	63	1,906,981	9%	22	720,300	12%
50,000 - 99,999	44	3,146,492	14%	16	1,152,411	19%
100,000 - 149,999	21	2,617,409	12%	8	958,967	16%
150,000 - 199,999	18	3,116,152	14%	4	712,021	12%
200,000+	24	10,639,065	48%	6	1,675,427	27%
Total	299	22,319,340	100%	221	6,169,038	100%

Base: attractions that provided data for 2019 (299) and 2020 and were open (221). Please note the sample will vary between years as not all attractions provided data in both 2019 and 2020.

Caution: Small sample sizes

Increase/ decrease in visitor numbers – 2020 vs 2019

- 6.32 Unsurprisingly virtually all attractions reported a decrease in visitors for 2020 compared to 2019. 98% of attractions said that their number of visits decreased in 2020. The attraction that reported an increase only began operating in late 2019.

Table 6.10 Increase/ decrease in visitor numbers – 2020 vs 2019

Visit number changes 2020 vs 2019	Indoor	Outdoor	Both - indoor and outdoor	Underground	All
Increased	1%				0%
Stayed the same		5%	1%		2%
Decreased	99%	95%	99%	100%	98%

Base: attractions providing data for 2020 (221)

Reasons for a decrease in visitors in 2020

6.33 Attractions were asked if they could give specific reasons why they received fewer visitors in 2020, beyond simply being closed or the COVID-19 pandemic. The reasons included:

- (1) Having to restrict visitors to allow for social distancing.
- (2) School and group tours being cancelled.
- (3) People wary of visiting places (such as attractions).
- (4) No special events or activities conducted by the attraction.
- (5) Lack of overseas visitors.
- (6) Did not reopen again in 2020 after the start of the pandemic.
- (7) Poor weather in January and February (pre pandemic), flooding and Storm Dennis.

Increase/ decrease in visitor numbers – 2019 vs 2018

6.34 In 2019, 37% of attractions reported an increase in visitors compared to 2018, 28% said the number of visitors stayed the same, and 29% said the number of visitors decreased.

6.35 As shown in table 6.11 below, outdoor attractions were most likely to report an increase in visitor figures for 2019. 51% of outdoor attractions reported an increase in visitors, whereas only 25% of indoor attractions reported an increase.

6.36 Although all attractions suffered in 2020, we have already seen that outdoor attractions suffered less. The data below suggests that outdoor attractions also fared better than indoor attractions in 2019.

Table 6.11 Increase/ decrease in visitor numbers – 2019 vs 2018

Visit number changes 2019 vs 2018	Indoor	Outdoor	Both - indoor and outdoor	Underground	All
Increased	25%	51%	44%	0%	37%
Stayed the same	33%	21%	28%	17%	28%
Decreased	34%	21%	25%	83%	29%
Don't know	7%	7%	3%	0%	5%

Base: attractions providing data for 2019 (299)

Reasons for an increase/ decrease in visitors in 2019

6.37 The reasons given by attractions reporting an increase in visitor numbers in 2019 were as follows:

- (1) Better marketing, advertising or promotion to the attraction.
- (2) Good weather.
- (3) Increased awareness of the attraction.
- (4) More social media activity/ stronger presence online.
- (5) Improvements to the attractions e.g. new developments or facilities.

6.38 The reasons given by attractions reporting a decrease in visitor numbers in 2019 were as follows:

- (1) Brexit/ lack of confidence in the economy and therefore less spending/outings.
- (2) Lack of overseas visitors.
- (3) Poor weather coinciding with periods when usually busy.

7. Comparative analysis of visits to tourist attractions

7.1 This section of the report looks at trends in the number of visits to attractions, comparing 2019 and 2020 visit figures, and in some cases, 2018 and 2019 visit figures. Please note that this section only relates to attractions that provided data for both years, in order to make like for like comparisons.

Overall comparisons in visitor figures

- 7.2 Amongst attractions responding to the 2018 and 2019 survey (table 7.1), visit numbers were more or less identical year on year. Whilst for attractions responding to the 2019 and 2020 survey (table 7.2), visit numbers fell by 68%.
- 7.3 For the 2019 and 2020 like for like comparisons, attractions which were closed in 2020 have been classed as having zero visitors. This is to help understand the effect of the COVID-19 pandemic on attractions. Of the 258 attractions included in the 2019 vs 2020 like for like comparisons, 39 were closed in 2020.

Table 7.1 Overall comparisons between 2018 and 2019

Base	No. of visits 2018	No. of visits 2019	% change
162	16,953,943	16,898,566	-0.3%

Base: attractions providing data for both 2018 and 2019

Table 7.2 Overall comparisons between 2019 and 2020

Base	No. of visits 2019	No. of visits 2020	% change
258	19,047,363	6,139,493	-68%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

Comparisons by admission type between 2019 and 2020

7.4 The decline the in the number of visits to free attractions and to paid attractions in 2020 was relatively similar (65% and 71% decrease respectively).

Table 7.3 Comparisons by admission type between 2019 and 2020

Admission type	Base	No. of visits 2019	No. of visits 2020	% change
Free	104	10,295,673	3,599,176	-65%
Paid	150	8,697,462	2,516,258	-71%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

Please note: Four attractions charged entry in 2019 but did not in 2020. These have not been included here. As a result, the totals differ slightly to the totals above, as the base is slightly different (254 attractions).

Please note: For attractions that were closed in 2020, we have assumed that if they had been open, they would either have charged or not charged for admission based on whether they charged or not in 2019.

Overall comparisons by region between 2019 and 2020

7.5 The decrease in the number of visitors to attractions in Mid Wales was greatest (73%). This compares to a 63% decrease in visitors to attractions in South West Wales.

Table 7.4 Overall comparisons by region between 2019 and 2020

Wales region	Base	No. of visits 2019	No. of visits 2020	% change
Mid	50	2,371,003	647,184	-73%
North	86	6,414,458	2,287,654	-64%
South East	64	6,357,143	1,770,127	-72%
South West	58	3,904,759	1,434,528	-63%
Total	258	19,047,363	6,139,493	-68%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

Please note: the base to tables in section 7 will be different to the base in tables in section 6. Section 7 counts attractions that were closed in 2020, so that a like for like comparison of visitor figures can be made.

Overall comparisons by category between 2019 and 2020

7.6 As with the earlier analysis shown in this report, table 7.5 below shows that country parks/ gardens and wildlife/nature reserves saw their visitor numbers decrease (44% and 45% decrease respectively), but not as much as other categories.

7.7 The table below also supports earlier analysis which suggests that museums/art galleries and railway/travel attractions were hit particularly badly. Attractions from these categories that provided data for both years saw an 83% decrease in their visitor numbers in 2020 compared to 2019.

Table 7.5 Overall comparisons by region between 2019 and 2020

Attraction category	Base	No. of visits 2019	No. of visits 2020	% change
Adventure/ activity attraction	27	1,786,641	653,002	-63%
Country park/ garden	23	2,376,717	1,336,478	-44%
Farm/ rare breeds	6	569,811	258,208	-55%
Food or drink attraction	13	202,764	47,988	-76%
Historic property	61	3,963,040	1,069,040	-73%
Industrial/ craft attraction	12	244,728	45,379	-81%
Museum/ art gallery	71	5,523,280	952,026	-83%
Railway/ travel	16	774,739	130,991	-83%
Science/ technology centre	3	167,219	27,759	-83%
Theme park/ leisure	1	678,714	185,312	-73%
Wildlife or nature reserve	20	2,517,941	1,394,557	-45%
Other attraction	5	241,769	38,753	-84%
Total	258	19,047,363	6,139,493	-68%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

Please note: the base to tables in section 7 will be different to the base in tables in section 6. Section 7 counts attractions that were closed in 2020, so that a like for like comparison of visitor figures can be made.

Caution: Small sample sizes

Overall comparisons by ownership

7.8 Cadw sites saw the largest decrease in visitor numbers – an 84% decrease in 2020 on 2019. This is followed by Amgueddfa Cymru – National Museum Wales which saw an 82% decrease in visitors across their sites. These also saw the largest decrease in their average visitor figures, as shown earlier on page 36.

Table 7.6 Overall comparisons by ownership

Ownership	Base	2020 closed sites included in comparison*	No. of visits 2019	No. of visits 2020	% change
Cadw	24	5	1,234,199	197,331	-84%
Local Authority / National Park	43	7	3,944,922	1,687,645	-57%
Amgueddfa Cymru - National Museum Wales	7	0	1,951,792	349,264	-82%
The National Trust	21	3	1,973,980	487,917	-75%
Natural Resources Wales**	3	0	354,111	256,000	-28%
Private owner / trust	153	24	8,557,844	2,612,692	-69%
RSPB	4	0	389,240	171,641	-56%
Dŵr Cymru Welsh Water	3	0	641,275	377,003	-41%
Total	258	39	19,047,363	6,139,493	-68%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

* This column shows the number of sites which were closed in 2020 that have been included for this comparison.

Please note that the base to tables in section 7 will be different to the base in tables in section 6. Section 7 counts attractions that were closed in 2020, so that a like for like comparison of visitor figures can be made.

Please note that some organisations were only able to provide data for a few of their sites.

**Please note that Natural Resources Wales were only able to provide data for 3 of their 29 sites in both 2019 and 2020.

Overall comparisons by venue type

7.9 Table 7.7 below shows the total visits by venue type for attractions that provided data for both 2019 and 2020. Unsurprisingly, underground attractions saw the biggest year on year decrease in visitor numbers (81% decrease). As suggested earlier in the report, indoor attractions suffered more than outdoor attractions.

Table 7.7 Overall comparison by venue type

Venue type	Base	Total visits 2019	Total visits 2020	% change
Indoor	95	5,965,763	1,224,327	-79%
Outdoor	48	4,569,578	2,343,340	-49%
Both - indoor and outdoor	109	8,007,207	2,473,883	-69%
Underground	6	504,815	97,943	-81%
Total	258	19,047,363	6,139,493	-68%

Base: attractions providing data for both 2019 and 2020 (attractions closed in 2020 classed as 0 visits)

Please note that the base to tables in section 7 will be different to the base in tables in section 6. Section 7 counts attractions that were closed in 2020, so that a like for like comparison of visitor figures can be made.

8. Admission charges

Overall admission charges for paid attractions

- 8.1 Table 8.1 below shows the average admission charges for paid attractions which provided admissions data for either 2018, 2019 or 2020.
- 8.2 The average admission charge for adults was £9.27 in 2019 and £9.32 in 2020. The average admission charge for children was £5.72 in 2019 and £6.16 in 2020.

Table 8.1 Overall admission charges

Average admission charge	2018	2019	2020
Adult	£9.42	£9.27	£9.32
Child	£6.74	£5.72	£6.16

Base: attractions providing data for 2018 (132, from previous survey), 2019 (158) and 2020 (116)

Admissions data from one attraction which provided data for 2019, but not for 2020, has been removed as their admissions charge was significantly above any others, and would therefore distort the figures in this section.

Comparison of admission charges

- 8.3 Tables 8.2 and 8.3 below analyse admission charges for paid attractions which provided data for both 2018 and 2019, or 2019 and 2020, so that like for like comparisons can be made. Child admission charges are not available for 2018. However, average adult admission charges for those who provided data for both years increased by 6% in 2019.

Table 8.2 Comparison of 2018 and 2019 admission charges for paid attractions

Average admission charge	2018	2019	% change
Adult	£8.86	£9.36	6%

Base: attractions providing data for both 2018 and 2019 (73)

- 8.4 Admission charges fell slightly in 2020 when comparing data from those who provided admission charges for both 2019 and 2020. Average adult admissions charges fell by 1% to £9.29 in 2020, and average child admission charges fell by 3% to £6.20 in 2020.

Table 8.3 Comparison of 2019 and 2020 admission charges for paid attractions

Average admission charge	2019	2020	% change
Adult	£9.42	£9.29	-1%
Child	£6.40	£6.20	-3%

Base: attractions providing data for both 2019 and 2020 (114)

Distribution of adult admission charges by range for 2019 and 2020

- 8.5 Table 8.4 below shows the distribution of adult admission charges for attractions that provided admissions data, for either 2019 or 2020, by charging band. Just under a third of attractions (29%) charged £10 or over in both 2019 and 2020.
- 8.6 Admission charges by band were relatively similar for 2019 and 2020. Although this is no surprise given that the average adult admission charge was similar between both years.
- 8.7 The exception is the proportion of attractions charging anything between £4.00 and £7.99. The proportion charging between £4.00 and £4.99 decreased (from 14% to only 5%), as did the proportion who charged between £7.00 and £7.99 (from 11% to 6%). The proportion who charged between £5.00 and £5.99 increased (from 15% to 21%), as did the proportion who charged between £6.00 and £6.99 (from 7% to 16%).

Table 8.4 Distribution of adult admission charges by range for all attractions

Average admission charge	2019	2020
Less than £1.00	3%	2%
£1.00 - £1.99	0%	1%
£2.00 - £2.99	6%	6%
£3.00 - £3.99	4%	6%
£4.00 - £4.99	14%	5%
£5.00 - £5.99	15%	21%
£6.00 - £6.99	7%	16%
£7.00 - £7.99	11%	6%
£8.00 - £8.99	7%	6%
£9.00 - £9.99	4%	3%
£10 and over	29%	29%

Base: attractions providing data for 2019 (158) and 2020 (116)

Comparison of distribution of adult admission charges by range

- 8.8 Table 8.5 below shows the distribution of admission charges for attractions which provided data for both 2019 and 2020. Once again, the admission charges by band for the same set of attractions are very similar between both years, except for all of the admission bands between £4.00 and £7.99.

Table 8.5 Comparison of adult admission charges by range 2019 and 2020

Average admission charge	2019	2020
Less than £1.00	3%	2%
£1.00 - £1.99	0%	1%
£2.00 - £2.99	6%	6%
£3.00 - £3.99	3%	6%
£4.00 - £4.99	10%	5%
£5.00 - £5.99	16%	21%
£6.00 - £6.99	8%	16%
£7.00 - £7.99	14%	6%
£8.00 - £8.99	6%	6%
£9.00 - £9.99	4%	3%
£10 and over	31%	28%

Base: attractions providing data for both 2019 and 2020 (114)

Average admission charge by region

8.9 Average admission charges for attractions providing data in either 2019 or 2020 were highest for North Wales, for both adults and children. In 2019 the average adult admission charge for North Wales was £11.12, and £11.50 in 2020. In 2019, the average child admission charge for attractions in North Wales was £7.06, and £8.82 in 2020.

8.10 The average admission fees for attractions in Mid Wales and South West Wales, for both 2019 and 2020, were around £8 for adults and £5 for children.

Table 8.6 Average admission charge by region

Average admission charge	Base 2019	Average adult admission charge 2019	Average child admission charge 2019	Base 2020	Average adult admission charge 2020	Average child admission charge 2020
Mid	26	£7.53	£4.43	18	£7.87	£4.40
North	56	£11.12	£7.06	41	£11.50	£8.82
South East	34	£9.26	£5.54	27	£7.88	£4.89
South West	42	£7.89	£4.88	30	£8.51	£4.74
Total/ overall average	158	£9.27	£5.72	116	£9.32	£6.16

Base: attractions providing data for 2019 (158) and 2020 (116)

Comparison of average admission charge by region

8.11 The results from data provided by attractions for both years shows that amongst these attractions, admission charges did not change greatly. However, this is no surprise given that adult admission charges amongst these attractions only decreased by 1%, and child admission charges only decreased by 3%.

Table 8.7 Comparison of average admission charge by region

Average admission charge	Base	Average adult admission charge 2019	Average child admission charge 2019	Average adult admission charge 2020	Average child admission charge 2020
Mid	18	£8.04	£4.79	£7.87	£4.40
North	41	£11.91	£8.67	£11.50	£8.82
South East	26	£8.17	£5.13	£7.88	£4.89
South West	29	£7.87	£5.34	£8.37	£4.90
Total/ overall average	114	£9.42	£6.40	£9.29	£6.20

Base: attractions providing data for both 2019 and 2020 (114)

Average admission charge by attraction category

- 8.12 Average admission charges were highest for adventure/ activity attractions. In 2019, the average adult admission charge was £15.81, whilst in 2020 it was £16.10. The admission charge for children was also highest, at £14.32 in 2019 and £15.35 in 2020.
- 8.13 The average entry fee for railway/travel attractions was not too dissimilar to those from adventure/activity attractions. The average adult admission charge for railway/ travel attractions was £14.28 in 2019 and £15.58 in 2020. However, the average child entry fee for these attractions is significantly lower, at an average of £5.84 in 2019 and £6.82 in 2020.
- 8.14 The lowest admission charges were for 'other attractions', however these represent attractions which do not fall into the other categories. Excluding 'other attractions', the lowest average adult admission charge for 2019 was for museum/ art galleries at £5.33. The lowest average child admission charge in 2019 was for country parks/ gardens at £2.15.
- 8.15 Excluding 'other attractions', the lowest admission charges in 2020 were also for museums/ art galleries at £6.08, whilst the lowest fee for children was again from country park/ gardens at £1.99.

Table 8.8 Average admission charge by attraction category

Average admission charge	Base 2019	Average adult admission charge 2019	Average child admission charge 2019	Base 2020	Average adult admission charge 2020	Average child admission charge 2020
Adventure/ activity attraction	23	£15.81	£14.32	19	£16.10	£15.35
Country park/ garden	14	£6.87	£2.15	11	£6.72	£1.99
Farm/ rare breeds	6	£8.23	£6.81	5	£9.48	£8.27
Food or drink attraction	11	£12.59	£6.37	7	£7.21	£1.79
Historic property	43	£7.10	£4.01	33	£6.98	£4.11
Industrial/ craft attraction	3	£8.50	£6.33	3	£8.17	£6.33
Museum/ art gallery	25	£5.33	£2.40	13	£6.08	£3.15
Railway/ travel	17	£14.28	£5.84	11	£15.58	£6.82
Science/ technology centre	2	£7.50	£5.25	2	£7.50	£5.25
Theme park/ leisure	1	£8.00	£6.00	1	£8.00	£6.00
Wildlife or nature reserve	10	£7.35	£4.83	8	£7.65	£5.54
Other attraction	3	£4.38	£5.18	3	£4.72	£5.25
Total/ overall average	158	£9.27	£5.72	116	£9.32	£6.16

Base: attractions providing data for 2019 (158) and 2020 (116)

Caution: Small sample sizes

Comparison of average admission charge by attraction category

- 8.16 Average admission charges were relatively similar between 2019 and 2020 for attractions which provided data for both years. However, as noted earlier, this is to be expected given that the average admission charges decreased only slightly amongst these attractions in 2020.
- 8.17 Excluding 'other attractions', only three attraction categories saw increases in admission charges for both adults and children. These are adventure/activity attractions, railway/ travel attractions, and admission charges increased marginally for wildlife/ nature reserves.

Table 8.9 Comparison of average admission charge by attraction category

Average admission charge	Base	Average adult admission charge 2019	Average child admission charge 2019	Average adult admission charge 2020	Average child admission charge 2020
Adventure/ activity attraction	19	£15.66	£14.96	£16.10	£15.35
Country park/ garden	11	£7.28	£2.28	£6.72	£1.99
Farm/ rare breeds	5	£9.48	£7.87	£9.48	£8.27
Food or drink attraction	6	£7.67	£3.42	£6.33	£2.08
Historic property	32	£7.66	£4.68	£6.89	£3.99
Industrial/ craft attraction	3	£8.50	£6.33	£8.17	£6.33
Museum/ art gallery	13	£6.12	£3.34	£6.08	£3.15
Railway/ travel	11	£14.16	£6.68	£15.58	£6.82
Science/ technology centre	2	£7.50	£5.25	£7.50	£5.25
Theme park/ leisure	1	£8.00	£6.00	£8.00	£6.00
Wildlife or nature reserve	8	£7.59	£5.35	£7.65	£5.54
Other attraction	3	£4.38	£5.18	£4.72	£5.25
Total/ overall average	114	£9.42	£6.40	£9.29	£6.20

Base: attractions providing data for both 2019 and 2020 (114)

Caution: Small sample sizes

Average admission charge by ownership

- 8.18 Average admission charges were highest for private owners/trusts in both 2019 and 2020. The average adult admission charge for these was £10.19 in 2019, and £10.80 in 2020. The average child admission charge for these was £6.66 in 2019 and £7.45 in 2020.
- 8.19 Average admission charges for attractions operated by Cadw decreased in 2020. For example in 2019, the average adult admission charge was £6.10, whilst adult admission charges reduced to £5.63 in 2020. Cadw was able to provide their admission charges for all paid attractions in both years, though in 2020 five of their sites did not open and were therefore not counted in the 2020 average admission charges.

Table 8.10 Average admission charge by ownership

Average admission charge	Base 2019	Average adult charge 2019	Average child charge 2019	Base 2020	Average adult charge 2020	Average child charge 2020
Cadw	24	£6.10	£3.67	19	£5.63	£3.33
Local Authority / National Park	17	£7.74	£3.11	10	£6.36	£4.30
Private owner / trust	108	£10.19	£6.66	78	£10.80	£7.45
RSPB	2	£6.00	£3.00	2	£5.25	£2.75

Base: attractions providing data for 2019 and/or 2020. The National Trust has been excluded as not enough data on admission charges was provided to make meaningful conclusions.

Caution: Small sample sizes

Comparison of average admission charge by ownership

8.20 Amongst attractions providing data for both 2019 and 2020, average admission charges for attractions operated by local authorities/ national parks increased slightly in 2020, as did admission charges for attractions operated by private owners/ trusts.

Table 8.11 Comparison of average admission charge by ownership

Average admission charge	Base	Average adult admission charge 2019	Average child admission charge 2019	Average adult admission charge 2020	Average child admission charge 2020
Cadw	19	£6.61	£3.97	£5.63	£3.33
Local Authority / National Park	10	£6.25	£4.10	£6.36	£4.30
Private owner / trust	76	£10.52	£7.50	£10.79	£7.54
RSPB	2	£6.00	£3.00	£5.25	£2.75

Base: attractions providing data for both 2019 and 2020. The National Trust has been excluded as not enough data on admission charges was provided to make meaningful conclusions.

Caution: Small sample sizes

9. Operations

Gross revenue movement

- 9.1 Nearly half (47%) of attractions reported a growth in revenue in 2018 compared to 2017 (results from previous survey).
- 9.2 Growth slowed in 2019 with 52% of attractions reporting similar revenue to the previous year. When looking at results by venue type, 50% of outdoor attractions reported an increase in revenue in 2019, whilst only 25% of indoor attractions reported an increase in revenue. 47% of attractions which class themselves as both indoor and outdoor attractions also saw an increase in revenue.
- 9.3 Unsurprisingly, the vast majority (90%) of attractions reported a decrease in gross revenue in 2020. The results to do not differ by venue type.

Table 9.1 Gross revenue movement

Gross revenue change	2018 compared with 2017	2019 compared with 2018	2020 compared with 2019
Up	47%	38%	2%
Similar	37%	52%	8%
Down	16%	10%	90%
Base	189	292	215

Base: attractions providing data for 2018/ 2019/ 2020 and were open the previous year

- 9.4 Those whose revenue decreased were asked what the percentage decrease was, if known. Of the 194 attractions that reported a decrease in revenue for 2020, 112 were able to provide the percentage decrease. The average percentage decrease amongst these attractions was 64%.

Overall employment in 2019 and 2020

- 9.5 Attractions were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2019 and 2020. For 2020, attractions were asked to provide figures for summer 2020, as staff numbers may have changed during the year, and summer is when they were most likely to be open.
- 9.6 In 2019, unpaid seasonal volunteers accounted for the largest proportion of workers (43%). This is in keeping with the results from previous years.
- 9.7 However, in 2020 the number of seasonal unpaid volunteers reduced significantly to 21% of staff at attractions in Wales. As a result, the proportion of workers for all of the other categories increased in 2020, with the exception of seasonal full-time staff, which stayed the same (3%) due to a decrease in numbers.

Table 9.2 Overall employment in 2019 and 2020

Employee type		No. of employees 2019	2019 %	No. of employees 2020	2020 %
Permanent	Full-time	1,718	17%	1,356	25%
	Part-time	1,425	14%	1,193	22%
	Unpaid volunteers	1,208	12%	822	15%
Seasonal	Full-time	326	3%	156	3%
	Part-time	1,114	11%	790	15%
	Unpaid volunteers	4,331	43%	1,123	21%
Total		10,170	10,122	100%	5,440

Base: attractions providing data for 2019 (274) and 2020 (235), including attractions that were closed in 2020

9.8 Attractions were also asked how many staff were put on furlough in 2020. In total, 59% of attractions that were able to provide employment figures said that they used the furlough scheme. These attractions put 2,228 staff on furlough in total. This equates to an average of 16.1 members of staff on furlough per attraction that used the scheme. The average amongst all attractions, including those who did not use furlough, was 9.5 members of staff.

9.9 The findings above are similar to those from the Tourism Barometer Coronavirus impact survey. When asked in September 2020, seven in ten attractions said that they had staff on furlough¹⁴. Among all industries in the UK, in August 2020 around 13% of the workforce were on partial or furlough leave, compared with 51% of the arts, entertainment and recreation industry¹⁵.

Overall change in employment between 2019 and 2020

9.10 Staff numbers have been collated for attractions which provided this information for both 2019 and 2020, so that a like for like comparison can be made. The results are shown in table 9.3 below.

9.11 Overall, there was a 30% decrease in staff amongst the attractions that provided employment figures for both years.

9.12 The data suggests that seasonal staff were hit harder than permanent staff. There was only a 6% decrease in full-time permanent staff amongst the attractions providing employment figures for both 2019 and 2020. Similarly, there was only a 1% decrease in part-time permanent staff. This compares to a 48% decrease in full-time seasonal staff and a 22% decrease in part-time seasonal staff.

¹⁴ [Tourism Barometer \(Coronavirus \(COVID-19\) impact survey\): wave 5 2020](#)

¹⁵ [Office for National Statistics: Coronavirus and the economic impacts on the UK: 27 August 2020](#)

9.13 Unpaid volunteers appear to be impacted the most, particularly seasonal unpaid volunteers. The number of seasonal unpaid volunteers in 2019 amongst participating attractions was 2,633, but this fell to 1,123 volunteers in 2020, a 57% decrease.

Table 9.3 Overall change in employment between 2019 and 2020

Employee type		No. of employees 2019	No. of employees 2020	% change
Permanent	Full-time	1,409	1,331	-6%
	Part-time	1,208	1,191	-1%
	Unpaid volunteers	1,111	822	-26%
Seasonal	Full-time	301	156	-48%
	Part-time	954	746	-22%
	Unpaid volunteers	2,633	1,123	-57%
Total		7,616	5,369	-30%

Base: attractions providing data for both 2019 and 2020 (232), including attractions that were closed in 2020

Change in employment by attraction category

9.14 Although dealing with small sample sizes, the year on year change in the number of staff by attraction category suggests that railway/ travel attractions and industrial/craft attractions were hit particularly hard. Both of these attraction categories saw a 50% decrease in staff in 2020 compared to 2019. Both of these attraction types also saw some of the largest year on year decreases in visitor numbers.

9.15 Museums/ art galleries were another attraction category to see large decreases in their year on year visitor figures. However, this reduction in visitors may not have necessarily transferred into as many job losses as may have been expected. Responding museums/art galleries saw a 27% decrease in staff in 2020.

9.16 Country parks/ gardens and wildlife/nature reserves saw an 18% and 20% decrease in staff in 2020 compared to 2019. These are amongst the smallest decreases in staff compared to the other categories. As noted earlier, visitor figures to these two attraction categories did not fall as dramatically as the number of visitors to other attraction categories.

Table 9.4 Change in employment by attraction category

Attraction category	Base	2019 staff	2020 staff	% change
Adventure/ activity attraction	26	863	665	-23%
Country park/ garden	20	483	397	-18%
Farm/ rare breeds	6	274	188	-31%
Food or drink attraction	13	116	78	-33%
Historic property	49	1,040	758	-27%
Industrial/ craft attraction	10	254	126	-50%
Museum/ art gallery	69	2,924	2,136	-27%
Railway/ travel	15	955	474	-50%
Science/ technology centre	2	32	27	-16%
Theme park/ leisure	1	88	63	-28%
Wildlife or nature reserve	16	513	411	-20%
Other attraction	5	74	46	-38%
Total	232	7,616	5,369	-30%

Base: attractions providing data for both 2019 and 2020 (232), including attractions that were closed in 2020

Staff figures include all permanent staff and all seasonal staff, including unpaid volunteers

Caution: Small sample sizes

Marketing expenditure levels

- 9.17 In 2018, 74% of attractions said that their marketing expenditure was similar to their marketing expenditure in 2017 (results from survey in 2018). This is similar for 2019, where around three quarters (77%) of attractions said that their marketing expenditure for 2019 was similar to their marketing expenditure for 2018.
- 9.18 Unsurprisingly, these results changed in 2020. About three quarters (76%) of attractions said that their marketing expenditure decreased in 2020 when compared to the levels spent in 2019.
- 9.19 Quite surprisingly, 20% said their marketing expenditure in 2020 was similar to the amount spent in 2019 and 4% indicated this had increased. This could be down to attractions desperately trying to make up for losses in visitor numbers, or the marketing spend for the year already having been agreed before the pandemic.

Table 9.5 Marketing expenditure levels

Attraction category	2018 compared with 2017	2019 compared with 2018	2020 compared with 2019
Up	16%	15%	4%
Similar	74%	77%	20%
Down	10%	8%	76%
Base	213	290	254

Base: attractions providing data for 2018/ 2019/ 2020

10. Visitor profile for 2019 and 2020

Proportion of adult and child visits by attraction category

- 10.1 The proportion of visitors to attractions that were adults is similar for both 2019 and 2020 – 71% and 73% respectively. This is line with the results from 2018, where 70% of visitors to attractions were adults.
- 10.2 For most attraction types in 2019, the majority of visitors were adults. The exception to this is for science/technology attractions, where 54% of visitors were children, and ‘other’ attractions, where 50% of visitors were children. Some of these ‘other’ attractions are indoor activity centres.
- 10.3 In 2020, science/technology attractions reported that only 32% of visitors were children. This may be due to fewer school trips/ group visits to these types of venues due to the COVID-19 pandemic.
- 10.4 The proportion of visitors in 2019 and 2020 that were adults and children is fairly similar for the remaining attraction categories between both years.

Table 10.1 Proportion of adult and child visits by attraction category

Attraction category	Base 2019	Average % adult visitors 2019	Average % child visitors 2019	Base 2020	Average % adult visitors 2020	Average % child visitors 2020
Adventure/ activity attraction	30	57%	43%	25	55%	45%
Country park/ garden	28	71%	29%	22	72%	28%
Farm/ rare breeds	7	61%	39%	6	59%	41%
Food or drink attraction	15	82%	18%	11	89%	11%
Historic property	67	77%	23%	31	78%	22%
Industrial/ craft attraction	12	76%	24%	8	84%	16%
Museum/ art gallery	77	75%	25%	51	77%	23%
Railway/ travel	20	72%	28%	12	77%	23%
Science/ technology centre	3	46%	54%	2	68%	32%
Theme park/ leisure	3	57%	43%	1	55%	45%
Wildlife or nature reserve	20	63%	37%	13	69%	31%
Other attraction	5	50%	50%	5	50%	50%
Total	287	71%	29%	187	73%	27%

Base: attractions providing data for 2019 / 2020

Please note, the majority of the above figures are based on estimates

Caution: Small sample sizes

Origin of visitors 2019 and 2020

- 10.5 The proportion of visitors that were from overseas in 2019 (10%) is similar to the results from the 2018 survey (11%). Unsurprisingly, the proportion of visitors to attractions in 2020 that were from overseas reduced to 3%.
- 10.6 The other significant change is the increase in the proportion of visitors in 2020 that were from Wales. In 2019, 47% of visitors to attractions were from Wales, whereas the figure reported by attractions for 2020 was 59%. This likely reflects the public's mindset to 'stay local', continuing with the message from Welsh Government earlier in the pandemic.

Table 10.2 Origin of visitors 2019 and 2020

Attraction category	2019	2020
Average % visitors from overseas	10.4%	3.1%
Average % visitors from Wales	47.3%	59.4%
Average % visitors from rest of UK	42.3%	37.5%

Base: attractions providing data for 2019 (242) and 2020 (174)

Proportion of visitors in organised groups / tours for 2019 and 2020

- 10.7 The proportion of visitors that were estimated to be from organised groups or tours in 2019 was 14%. This is similar to the estimate provided for 2018 (13%).
- 10.8 Quite surprisingly, the proportion of visitors from groups or tours only reduced to 8% in 2020.

Table 10.3 Proportion of visitors in organised groups / tours for 2019 and 2020

Attraction category	Average % visiting in groups/ tours
2019	14%
2020	8%

Base: attractions providing data for 2019 (287) and 2020 (186)

11. In-depth interviews: Main findings

As discussed earlier in this report, one aim of the in-depth interviews was to understand how attractions estimate their visitor figures, as summarised in sections 3.13 to 3.15. A number of other topics were discussed in the interviews. The main findings are discussed below.

Many have had difficulty in retaining volunteers

11.1 Many of the attractions that took part in the interviews said that they have had difficulty in retaining volunteers. One smaller attraction has not reopened as their volunteers tend to be older, and therefore at risk. Another attraction decided not to ask for any volunteers as they are trying to reduce the number of staff in the attraction.

“We haven’t used volunteers since the pandemic. We’re trying to reduce the number of staff in the museum, to only have the numbers we need. But they also tend to be older people, and it just wouldn’t make sense for us to take that risk, especially when it’s not essential that we have them”

“We haven’t reopened yet since the pandemic. We’re all volunteers here and it just doesn’t make sense to open when all of our staff are at risk”

“A lot of the volunteers haven’t returned to us yet because they’re not quite sure about returning because of Covid”

“We rely extensively on volunteers which has been one of our downfalls in that we haven’t been able to get them to come back yet”

A few increased their online presence

11.2 When attractions were forced to close, there was little they could do, but a few of those spoken to said that they were keen to stay visible. Particularly as when they were allowed to reopen, they wanted to be at the forefront of people’s minds as a place to visit.

“We ran podcasts, we did social media posts and things like that. I think it’s increased our presence in the community but it’s hard to tell”

“We developed our website a bit more with different kind of things, and we did a bit more on Facebook. We wanted to stay in people’s minds”

Some said that they have voluntarily kept some COVID-19 measures

11.3 Despite restrictions on attractions ending, some of those spoken to said that they have decided to retain COVID-19 measures they adopted whilst restrictions were in place.

“We’ve kept to the one way system, it’s just easier. Especially for people with pushchairs”

“A meal is offered as part of the tour, but now we serve it outside whenever we can”

“We’re still operating at reduced capacity, because different groups don’t really want to sit next to other people, they want to sit apart, so we still don’t use all seats”

“We are part of the council, so we have to follow the restrictions they still have in place which includes the 2m social distancing, facemasks, contact tracing, so they have to provide their details when entering the building. Because we’re a small space we have decided to have limitations on the number of people that come in to protect ourselves and visitors”

11.4 There were some measures, however, that attractions were glad to remove. One attraction said that advance booking used to be a requirement, but now they simply ask visitors to book beforehand only if they are able to do so.

“We did do online only bookings to stagger entry, but we found that it limited older people, and it caused congestions at reception because older visitors couldn’t work out how to use the advance booking system. But we also have a suspicion that it might put people off. So we ask people to book beforehand, but it’s not essential”

11.5 One attraction said that they continue to change their offering slightly from what it was before the pandemic, to allow for COVID-19 measures they still adopt.

“We’ve stopped doing bike hire because there’s a lot of touching on a bike. We used to offer canoes for an hour but because we had to wipe everything down each time we now offer them for ½ days”

Two attractions said they foresee price rises next year

11.6 Both of these attractions said that they will need to start repaying loans taken during the pandemic, and also cited rises in heating and petrol prices.

“Prices will have to go up, the reason being is we have to start repaying the loan that we got through the government. Everything has gone through the roof, the price of fuel is bananas, insurance is ridiculous. We’ll have to do something”

12. Alphabetical list of attractions responding to the survey 2019 and 2020

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
123 Jump Ltd	SE	PO	A/A	101,177	29,553	† ¹⁶	£1.00
1940s Swansea	SW	PO	MAG	10,500*	4,000*	£7.95	£6.50
Aberconwy House	N	NT	HP	20,884	289	NP	NP
Aberdulais Tin Works and Waterfall	SW	NT	IND	26,214	629	£6.00	£6.00
Aberglasney Gardens	SW	PO	CP	40,000*	16,000*	£9.50	£9.75
Abertillery & District Museum Society	SE	PO	MAG	5,470*	664	-	-
Aberystwyth Cliff Electric Railway	M	PO	R/T	85,000*	40,000*	£5.50	£5.50
Aberystwyth University School of Art Museum and Galleries	M	LA/NP	MAG	35,000*	3,500*	-	-
AirWorld Aviation Museum (Caernarfon Air World)	SE	PO	MAG	9,758	790	£6.50	£6.50
Alyn Waters Country Park	N	LA/NP	CP	258,764*	258,764*	-	-
Amelia Trust	SE	PO	Farm	20,000*	-	£2.00	-
Amgueddfa'r Mor Porthmadog Maritime Museum	N	PO	MAG	6,766	-	£2.00	-
Ancre Hill Vineyard	SE	PO	F/D	4,000*	-	£10.00	-
Andrew Logan Museum of Sculpture	SW	PO	MAG	320*	-	£5.00	-
Anglesey Model Village	N	PO	OTH	17,576	4,292	£4.95	£5.95
Atlantic Arts Centre	M	PO	MAG	6,000*	100*	£10.00	-
Attic Gallery	SW	PO	MAG	1,500*	-	-	-
Battlefield Live Pembrokeshire	SW	PO	A/A	2,020*	42*	£16.00	£16.00
Beaumaris Castle	N	Cadw	HP	81,588	15,965	£7.30	£6.50
Big Pit National Coal Museum	SE	AC-NMW	MAG	140,466	16,943	-	-
Blaenavon Ironworks	SE	Cadw	HP	14,119	2,822	£5.80	£5.20
Blaenavon World Heritage Centre	SE	LA/NP	IND	41,489	1,058	-	-
Bluestone Brewing Company	SW	PO	F/D	12,000*	-	-	-
Bodafon Farm Park	N	PO	Farm	20,000*	9,000*	-	-
Bodnant Garden	N	NT	CP	271,339	106,728	£15.40	£8.00
Bodrhyddan Hall	N	PO	HP	1,756	-	£7.00	-
Brecknock Museum & Art Gallery	M	LA/NP	MAG	4,582	32,520	-	-
Brynmawr & District Museum	SE	LA/NP	MAG	3,500*	-	-	-

¹⁶ † Free for adults but an admission charge for children

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Bwlch Nant yr Arian Visitor Centre	M	NRW	WL	138,000*	80,000*	-	-
Byd Mary Jones World	N	PO	MAG	2,798	-	£4.25	-
Cadair Idris Visitor Centre	N	NRW	CP	3,184*	-	-	-
Cae Hir Gardens	SW	PO	CP	2,928	-	£6.00	-
Caerau Gardens	N	PO	CP	6,000*	2,500*	£4.50	£4.50
Caerleon Roman Fortress and Baths	SE	Cadw	HP	38,631	2,261	£4.20	£3.80
Caernarfon Castle	N	Cadw	HP	199,074	25,321	£9.90	£5.20
Caerphilly Castle	SE	Cadw	HP	96,628	17,871	£8.90	£8.00
Caldicot Castle & Country Park	SE	PO	HP	140,000*	-	-	-
Canolfan Rhiannon	M	PO	IND	9,500*	3,000*	-	-
Canolfan Ucheldre Centre	N	PO	HP	26,319	7,244	-	-
Canolfan y Celfyddydau Aberystwyth Arts Centre	M	PO	MAG	658,088	55,580	-	-
Canolfan Y Plase	N	PO	MAG	1,840	-	-	-
Cantref Adventure Farm	M	PO	HP	38,000	17,000*	£13.00	£14.00
Cardiff Boat Tours	SE	PO	R/T	78,000*	5,500*	£4.00	£5.00
Cardiff Castle	SE	LA/NP	HP	502,224*	195,930	£13.50	£13.50
Cardiff Open Top Tour Buses	SE	PO	R/T	37,000*	10,000*	£12.50	£13.00
Cardiff Waterbus	SE	PO	R/T	77,828	-	£8.00	-
Cardigan Bay Marine Wildlife Centre	SW	PO	WL	16,898	109	-	-
Carew Castle	SW	LA/NP	HP	42,937	12,576	£6.00	£6.00
Carmarthen Castle	SW	LA/NP	HP	19,247*	-	-	-
Carmarthenshire Museum	SW	LA/NP	MAG	10,441	525	-	-
Castell Coch	SE	Cadw	HP	58,937	8,610	£7.30	£6.50
Castell Henllys Iron Age Fort	SW	LA/NP	HP	17,421	5,482	£5.50	£6.50
Cefn Coed Colliery Museum	SW	LA/NP	MAG	10,500*	-	-	-
Ceredigion Museum	M	LA/NP	MAG	110,000*	2,800*	-	-
Chapel Bay Fort & Museum	SW	PO	MAG	1,505*	-	£5.00	-
Chepstow Castle	SE	Cadw	HP	58,901	14,982	£7.30	£6.50
Chirk Castle and Garden	N	NT	HP	185,480	57,262	NP	NP
Cilgerran Castle	M	Cadw	HP	24,273	-	£4.20	-
Clerkenhill Adventure Farm and Frizbee Golf	SW	PO	A/A	17,000*	10,000*	£8.50	£6.00
Cloverlands Model Car Museum	M	PO	MAG	1,000*	6	£2.50	-
Coed y Brenin Visitor Center	N	NRW	WL	183,991	-	-	-
Colby Woodland Garden	SW	NT	CP	50,927	1,668	NP	NP
Coles	SW	PO	F/D		200*	-	£12.50

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Conwy Castle	N	Cadw	HP	212,364	35,553	£9.90	£8.80
Conwy Mussel Museum	N	LA/NP	MAG	6,000*	3,000*	-	-
Conwy Suspension Bridge	N	NT	HP	17,324	190	NP	NP
Conwy Water Gardens	N	PO	CP	51,000*	17,000*	-	-
Copper Kingdom	N	PO	IND	5,162	-	-	-
Corris Railway	M	PO	R/T	5,066	-	-	-
Cosmeston Lakes Country Park	SE	LA/NP	CP	250,000*	150,000*	-	-
Cosmeston Medieval Village	SE	LA/NP	HP	3,818*	1,367*	£5.10	£5.10
Craft in the Bay	SE	PO	IND	36,306	9,908	-	-
Craig-y-Nos Country Park	SE	LA/NP	CP	254,666	88,337	-	-
Criccieth Castle	N	Cadw	HP	46,083	4,709	£5.80	£5.10
Cwm Byddog	M	PO	CP	1,000*	900*	-	-
Cwm Weeg Gardens	M	PO	CP	425	100	£5.00	£5.00
Cwrw Llyn Cyf	N	PO	F/D	1,000*	1,000*	-	-
Cyfarthfa Castle Museum and Art Gallery	SE	LA/NP	MAG	56,311	9,537	£2.20	£2.30
Cynon Valley Museum & Gallery	SE	PO	MAG	17,779	4,321	-	-
Da Mhile	SW	PO	F/D	500*	100*	£10.00	£5.00
Dan yr Ogof, the National Showcaves Centre for Wales	SE	PO	MAG	85,000*	20,000*	£15.00	£15.50
DangerPoint	N	PO	OTH	7,500*	1,500*	£5.00	£5.00
Denbigh Castle	N	Cadw	HP	9,766	8,921	£4.20	£3.80
Denmark Farm Conservation Centre	SW	PO	WL	1,000*	600*	-	-
Devil's Bridge Waterfalls	M	PO	CP	59,164*	28,750*	£4.00	£4.00
Dinosaur Park (The)	SW	PO	A/A	60,000*	42,000*	£11.75	£12.50
Dolaucothi Gold Mines	SW	NT	IND	23,349	-	NP	-
Dyfed Shire Horse Farm	SW	PO	Farm	11,000*	7,000*	£7.95	£7.50
Dyffryn Fernant	SW	PO	CP	4,600	1,000	£7.00	£7.00
Dyffryn Gardens	SE	NT	CP	167,389	79,723	NP	NP
Dyfi Osprey Visitor Centre	M	LA/NP	WL	12,000*	-	£4.00	-
Dylan Thomas Boathouse	SW	LA/NP	MAG	25,000*	960*	£5.00	£5.00
Dylan Thomas Centre	SW	LA/NP	OTH	110,872	17,515	-	-
Elan Valley Visitor Centre	M	DCWW	WL	210,259	109,913	-	-
Erddig	N	NT	HP	176,874	67,208	NP	NP
Fairbourne and Barmouth Steam Railway	N	PO	R/T	22,000	11,000	£10.50	£10.90
Falconry Experience Wales	M	PO	WL	60,000*	-	£175.00	-
Fantasy Farm Park	M	PO	A/A	12,500*	-	£8.95	-

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Ffestiniog and Welsh Highland Railways	N	LA/NP	R/T	186,205	-	£43.00	-
Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	SE	PO	MAG	117,405	20,000*	£12.50	£12.50
Folly Farm	SW	PO	Farm	438,234	203,073	£16.50	£16.95
Fonmon Castle	SE	PO	HP		29,345	-	£10.00
Fourteen Locks Canal Centre	SE	PO	HP	65,253	19,774	-	-
Fun Centre (The)	N	PO	A/A	80,000*	5,000*	£2.00	£2.00
Garwnant Visitor Centre	SE	NRW	CP	90,000*	56,000*	-	-
Gigrin Farm	M	PO	WL	20,000	9,000*	£7.50	£7.50
Glasfryn Parc Activity Centre	N	PO	A/A	70,000*	15,000*	-	-
Glynn Vivian Art Gallery	SW	PO	MAG	54,141	9,563*	-	-
Gnoll Estate	SW	LA/NP	CP	150,000*	-	-	-
Golden Grove and Gelli Aur Country Park	SE	PO	HP	10,000*	8,500*	-	-
Gower Coast Adventures	SW	PO	A/A	1,882	-	£45.00	-
Gower Heritage Centre	SW	PO	F/D	58,516	16,221	£7.00	£4.00
Goytre Wharf Visitor and Activity Centre	SE	PO	A/A	60,000*	35,000*	-	-
Great Orme Mines	N	PO	A/A	31,576	13,176	£8.00	£8.00
Great Orme Tramway	N	LA/NP	R/T	190,227	-	£8.10	-
Greenfield Valley Heritage Park	N	LA/NP	CP	17,565*	8,167*	£6.70	£6.70
Gregynog Hall	SE	PO	HP	3,500*	-	-	-
Gwili Steam Railway	SW	PO	R/T	31,000	164	£12.00	£35.00
Gwinllan Conwy	N	PO	F/D	6,500*	-	£20.00	-
Hangar 5 Trampoline Park	SW	PO	A/A	7,500*	2,000*	£12.00	£12.00
Harlech Castle	N	Cadw	HP	103,246	15,378	£7.30	£6.50
High Glanau Manor	SE	PO	HP	1,226	-	£15.00	-
Hilton Court Gardens and Crafts	SW	PO	CP	30,000*	-	£4.10	-
Holyhead Maritime Museum	N	PO	MAG	5,167	-	£5.00	-
Home Front Museum	N	PO	MAG	10,000*	1,500*	£3.50	£3.75
Horse Drawn Boat Centre (The)	N	PO	R/T	68,000*	-	£13.50	-
Hywel Dda Gardens & Interpretive Centre	SW	LA/NP	HP	1,000*	-	£3.00	-
Inigo Jones & Co Ltd	N	PO	IND	15,760	10,000*	£6.50	£6.50
Joseph Parry's Ironworker's Cottage	SE	LA/NP	IND	754	-	-	-
Kidwelly Castle	SW	Cadw	HP	29,849	3,185	£5.80	£5.10
King Arthur's Labyrinth	M	PO	A/A	30,000	-	£12.25	-

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
King Street Gallery	SW	PO	MAG	7,800*	-	-	-
Kymin (The)	SE	NT	HP	6,244	-	NP	-
Lake Vyrnwy Nature Reserve	M	RSPB	WL	182,201*	60,000*	-	-
Lampeter Museum	M	PO	MAG	3,000*	-	-	-
Last Invasion Tapestry (The)	SW	PO	MAG	17,000	-	-	-
Laugharne Castle	SW	Cadw	HP	15,396	3,460	£4.20	£3.80
LC Waterpark and Leisure Complex Swansea	SW	PO	Theme	678,714*	185,312*	£8.00	£8.00
Llanberis Lake Railway	N	PO	R/T	76,741	-	£9.30	-
Llandaff Cathedral	SE	PO	HP	12,260	5,501*	-	-
Llandegfedd Visitor Centre	SE	DCWW	WL	285,029	180,779	-	-
Llandudno Ski and Snowboard Centre	N	PO	A/A	18,000*	-	-	-
Llanerchaeron	M	NT	HP	52,716	8,233	NP	NP
Llanfair Slate Caverns & Farm Park	N	PO	A/A	22,500	4,500*	£6.50	£5.50
Llangollen Motor Museum	N	PO	MAG	5,000*	80*	£5.00	£5.00
Llangollen Museum	N	PO	MAG	22,637	2,619	-	-
Llanover Garden	SE	PO	HP	1,100*	520	£5.00	£6.00
Llantarnam Grange Arts Centre	SE	PO	MAG	34,450	13,796	-	-
Llantrisant Guildhall	SE	LA/NP	HP	3,000*	2,000*	-	-
Llanyrafon Mill	SE	LA/NP	IND	180*	50*	-	-
Llechwedd Slate Caverns	N	PO	A/A	47,000*	15,000*	£20.00	£20.00
Llyn Brenig Visitor Centre	N	DCWW	WL	145,987	86,311	-	-
Llyn Maritime Museum / Amgueddfa Morwrol Llŷn	N	PO	MAG	7,000*	125*	-	-
Loggerheads Country Park	N	LA/NP	CP	263,000*	-	-	-
Loving Welsh Food	SE	PO	F/D	790	-	£40.00	-
Maesfron Hall and Gardens	M	PO	CP	1,500*	100*	£5.00	£5.00
Manobier Castle	SW	PO	HP	19,000	8,978*	£5.50	£5.50
Manor Wildlife Park	SW	PO	WL	83,565	71,625	£13.95	£14.95
Manorafon Farm park	N	PO	Farm	46,770	19,311	£4.95	£5.95
Menai Heritage	N	PO	MAG	849	-	£3.00	-
Mid Wales Arts Gallery & Sculpture Park	M	PO	MAG	11,000*	5,000*	-	-
Milford Haven Heritage & Maritime Museum	SW	PO	MAG	8,400*	-	£4.00	-
Mold Library Museum & Art Gallery	N	PO	MAG	15,000*	500*	-	-
MOMA Machynlleth	M	PO	MAG	22,690*	3,908	-	-
Montys Brewery Visitor Centre	M	PO	F/D	14,000*	5,200*	-	-

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Museum of Cardiff	SE	LA/NP	MAG	88,473	37,865	-	-
Narberth Museum - The Bonded Stores	SW	PO	MAG	2,600*	-	£4.50	-
National Cycle Collection	M	PO	MAG	3,000*	2,000*	£5.00	£5.00
National Museum Cardiff	SE	AC-NMW	MAG	584,256	130,563	-	-
National Roman Legion Museum	SE	AC-NMW	MAG	21,712	12,562	-	-
National Slate Museum	N	AC-NMW	MAG	152,903	19,715	-	-
Stackpole Nature Reserve	SW	NT	WL	256,746	129,753	-	-
National Waterfront Museum Swansea	SW	AC-NMW	MAG	275,242	52,672	-	-
National Wool Museum	M	AC-NMW	MAG	31,108	4,430	-	-
Newport Medieval Ship	SE	LA/NP	MAG	3,500*	-	-	-
Newport Wetlands Visitor Centre & Nature Reserve	SE	RSPB	WL	112,277	75,213	-	-
Newton House & Dinefwr Park	SW	NT	HP	87,249	8,467	NP	NP
Newtown Textile Museum	M	PO	MAG	1,273	205	-	-
North Wales Bowls Centre	N	PO	A/A	35,219*	10,509*	-	-
Nova Prestatyn	N	LA/NP	Theme	150,000*	-	†	-
Ocean Lab	SW	LA/NP	WL	5,263	1,281	£3.50	£4.50
Oneplanet Adventure	N	PO	A/A	147,729	47,030	-	-
Oriel Kyffin Williams	N	PO	MAG	78,173*	27,915*	-	-
Oriel Môn, Anglesey	N	LA/NP	MAG	71,173	15,413	-	-
Oriel Mostyn Gallery	N	PO	MAG	63,877	19,066	-	-
Oriel Myrddin gallery	SE	PO	MAG	20,853	320	-	-
Oriel Plas Glyn-Y-Weddw Arts Centre	N	PO	MAG	120,000*	2,500*	-	-
Oriel Y Parc Visitor Centre & Gallery	SW	LA/NP	MAG	118,429	36,931	-	-
Oxwich Castle	SW	Cadw	HP	5,932	-	£4.20	-
Oystermouth Castle	SW	LA/NP	HP	16,000*	-	£4.00	-
Palace Fun Centre	N	PO	A/A	15,600*	-	†	-
Parc Bryn Bach	SE	PO	A/A	182,000*	52,500*	-	-
Parc Howard Museum	SW	PO	MAG	14,778	1,310	-	-
Parc Slip Wildlife Trust Visitor Centre	SE	PO	WL	80,000*	-	-	-
Parva Farm Vineyard	SE	PO	F/D	5,000*	4,000*	£12.00	-
Pembrey Country Park	SW	LA/NP	CP	611,114	405,444	-	-
Pembroke Dock Heritage Centre	SW	PO	MAG	7,982	1,948	£5.00	£5.00

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Pembrokeshire Candle Centre & Museum	SW	PO	MAG	4,000*	2,000*	-	-
Penderyn Distillery	SE	PO	F/D	42,228	19,953	£10.50	-
Penrhyn Castle	N	NT	HP	134,896	7,793*	£14.00	£10.00
Pierhead	SE	LA/NP	HP	112,365*	13,287*	-	-
Plantasia	SW	PO	A/A	77,509	49,183	£7.00	£7.00
Plas Brondanw Gardens	N	PO	CP	4,150*	1,546*	£5.00	£5.00
Plas Cadnant Hidden Gardens	N	PO	CP	22,435	11,000*	£7.50	£7.50
Plas Mawr	N	Cadw	HP	35,356	4,236	£7.30	£6.50
Plas Newydd	N	NT	HP	155,976	12,000	£13.00	£13.00
Plas yn Rhiw	N	NT	HP	23,211	102	NP	NP
Plasley Craft Centre	N	PO	A/A	10,000*	3,000*	-	-
Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	N	PO	HP	410,041*	275,336*	-	-
Pontypool Museum	SE	PO	MAG	30,536	-	£5.00	-
Pontypridd Museum	SE	LA/NP	MAG	24,913	1,175	-	-
Porth y Swnt	N	NT	WL	12,657	489	£2.00	£2.00
Porthcawl Museum and Historical Society	SW	LA/NP	MAG	6,234*	436*	£2.00	£2.00
Portmeirion	N	PO	HP	245,690	128,596	£13.00	£13.00
Powis Castle and Garden	M	NT	HP	184,437*	4,031*	£14.00	£14.00
Quackers	M	PO	OTH	29,000*	3,120*	£3.20	£3.20
Raglan Castle	SE	Cadw	HP	66,751	16,248	£7.30	£6.50
Raul Speek Gallery	SW	PO	MAG	30,000*	-	-	-
Rhayader Tunnel	M	LA/NP	CP	7,000*	7,000*	-	-
Rheidol Visitor Centre and Power Station	M	PO	SC/T	800*	-	-	-
Rheilffordd Llyn Tegid / Bala Lake Railway	N	PO	R/T	33,000*	13,000*	£11.50	£12.00
Rhiw Valley Light Railway	M	PO	R/T	450*	-	£5.00	-
Rhuddlan Castle	N	Cadw	HP	20,328	1,264	£4.20	£3.80
Rhymney Brewery Visitor Centre	SE	PO	F/D	3,600*	200*	£2.50	£2.50
RibRide	N	PO	A/A	21,299	7,779	£25.00	£25.00
Royal Cambrian Academy of Art	N	PO	MAG	30,000*	-	-	-
Royal Welch Fusiliers Museum	N	PO	MAG	149,213	12,583	-	-
RSPB Conwy Nature Reserve	N	RSPB	WL	78,950	30,743	£6.00	£6.00
Rug Chapel	N	Cadw	HP	1,260	-	£4.20	-
Scolton Manor Museum	SW	LA/NP	HP	95,828*	-	£3.50	-

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Seaquarium	N	PO	A/A	61,367*	29,463*	£9.75	£9.99
Senedd Cymru	SE	LA/NP	OTH	76,821*	12,326*	-	-
Sirhowy Ironworks	SE	LA/NP	IND	300*	-	-	-
Snowdon Mountain Railway	N	PO	R/T	143,865	29,194	£31.00	£31.00
Solva Woollen Mill	SW	PO	MAG	18,822*	-	-	-
South Stack Lighthouse & Visitor Centre - South Stack Ynys Lawd Ltd	N	PO	HP	20,000*	-	£7.00	-
St Asaph Cathedral	N	PO	HP	4,318*	188*	-	-
St David's Bishops Palace	SW	Cadw	HP	21,342	2,806	£4.20	£3.80
St David's Cathedral	SW	PO	HP	270,000*	-	-	-
St Fagans National Museum of History	SE	AC-NMW	MAG	746,105	112,379	-	-
St. Mary's Priory and Tithe Barn	SE	PO	HP	10,000*	-	-	-
Storiol Gwynedd	N	LA/NP	MAG	6,000*	-	-	-
Strata Florida	M	Cadw	HP	5,083	-	£4.20	-
Swansea Community Boat - "Copper Jack"	SW	PO	R/T	8,315	168	£10.00	£10.00
Swansea Museum	SW	LA/NP	MAG	100,371	661	-	-
Swtan Heritage Museum	N	LA/NP	MAG	1,500*	-	£3.50	-
Talylyn Railway	N	PO	R/T	49,344	12,855	£19.00	£11.00
Tanat Valley Light Railway	M	PO	R/T	4,000*	-	-	-
Task Force	SE	PO	A/A	10,617	2,632	£30.00	£30.00
Techniquet	N	PO	SC/T	164,000*	27,500*	£8.00	£8.00
Teifi Valley Railway	SE	PO	R/T	4,500*	750*	-	-
Tenby Museum & Art Gallery	SE	PO	MAG	15,630	3,000*	£4.95	£4.95
The Anglesey Sea Salt Company Halen Mon	N	PO	F/D	29,130	284	£6.50	£6.50
The Animalarium	M	PO	Farm	23,350	6,824	£9.50	£9.50
The Castle and Regimental Museum, Monmouth	SE	LA/NP	MAG	4,407	-	-	-
The Gate	SW	PO	MAG	27,219	5,275	-	-
The Magic of Life Butterfly House	M	PO	WL	12,903	6,028	£8.00	£8.00
The Mushroom Garden	N	PO	F/D	190*	30	£5.00	£5.00
The National Botanic Garden of Wales	SW	PO	CP	163,096	91,610	£10.50	£11.50
The National Coracle Centre	SW	PO	MAG	2,115	-	-	-
The Play Barn	M	PO	A/A	27,746	7,000*	†	†
The Play King	SW	PO	A/A	75,000*	15,000*	†	†
The Regimental Museum of The Royal Welsh	M	PO	MAG	8,147	3,291	£5.00	£5.00

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
The Royal Mint Experience	SE	LA/NP	IND	82,714	20,434	£13.00	£12.00
The Spaceguard Centre	M	PO	SC/T	2,419	259	£7.00	£7.00
The Vale of Rheidol Railway Ltd	M	PO	R/T	53,972	860	£25.30	£26.00
Thomas Shop & Museum (The)	M	PO	MAG	3,000*	1,300*	-	-
Tintern Abbey	SE	Cadw	HP	71,105	12,312	£7.30	£5.00
Tir Prince Fun Park	N	PO	Theme	1,000,000*	-	-	-
Tredegar House	SE	NT	HP	89,529	2,556	£10.10	£5.00
Trefriw Woollen Mills Ltd	N	PO	MAG	40,214*	15,693*	-	-
Tretower Court and Castle	M	Cadw	HP	12,452	1,427	£7.30	£6.50
Tudor Merchant's House	SW	NT	HP	27,414	796	NP	NP
Tŷ Mawr Country Park Visitor Centre	N	LA/NP	CP	41,655	4,141	-	-
Tŷ Mawr Wybrnant	N	NT	HP	3,125	-	NP	-
Ty Pawb	N	PO	MAG	100,000*	-	-	-
Upton Castle Gardens	SW	PO	CP	1,800	-	£6.00	-
Usk Castle	SE	PO	HP	6,754	203	£2.00	£2.00
Valle Crucis Abbey	N	Cadw	HP	5,735	-	£4.20	-
Wales Ape and Monkey Sanctuary	SE	PO	Farm	30,457	13,000*	£8.50	£7.50
Wales Millennium Centre	SE	PO	MAG	1,142,706*	203,552*	-	-
Walkers on Snowdon	N	LA/NP	WL	590,984	329,258	-	-
Welsh Mountain Zoo	N	PO	WL	163,299	97,770	£13.75	£13.75
Welsh Royal Crystal	M	PO	IND	3,000*	300*	-	-
Welsh Wildlife Centre	SW	PO	WL	25,000*	-	-	-
Welshpool & Llanfair Light Railway	M	PO	R/T	29,000*	7,500*	£14.50	£12.00
West Wales Arts Centre	SW	PO	MAG	30,000*	5,000*	-	-
White Castle Vineyard	SE	PO	F/D	2,600*	1,000*	£15.00	£15.00
Wickedly Welsh Chocolate (The)	SW	PO	F/D	30,000*	-	-	-
Wiggleys Fun Farm	SE	PO	A/A	60,000*	10,000*	£2.00	£2.00
Wildlife Seawatch	SW	PO	WL	43,000*	-	-	-
Wireless in Wales / Gwefr heb Wifrau	N	PO	MAG	200*	10*	-	-
Workhouse History Centre	M	PO	HP	3,000*	300*	-	-
Wrexham County Borough Museum	N	LA/NP	MAG	28,955	7,905	-	-
WWT Llanelli Wetland Centre	SW	PO	WL	69,785	-	£8.81	-
Y Lanfa Powysland Museum and Welshpool Library	M	PO	MAG	1,476	14	-	-

Attraction Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	2019 £ Adult	2020 £ Adult
Ynys Las Visitor Centre - National Nature Reserve	M	NRW	WL	126,111	120,000*	-	-
Ynys-hir Nature Reserve	M	RSPB	WL	15,812	5,685	£6.00	£4.50
Zip World Forest	N	PO	A/A	223,500*	121,035*	£25.00	£25.00
Zip World Penrhyn Quarry	N	PO	A/A	145,000*	80,600*	£89.00	£99.00
Zip World Slate Caverns	N	PO	A/A	179,000*	46,000*	£25.00	£25.00

Appendices

Appendix I: Questionnaire

Visits to Welsh Tourist Attractions 2019 & 2020

Q1 What is the name of your attraction?

Visitors (2019)

Q2 What were the visitor numbers to your attraction during the 2019 calendar year?

Please exclude special events outside normal opening hours or any private hire. If a leisure or fitness facility, please exclude gym or fitness class members, if possible. If a theatre, please exclude theatre goers, if possible.

Please leave out any commas, e.g. enter 1000 rather than 1,000

Total visits numbers in 2019 (paid and free combined)

Visits numbers in 2019 for paid visits only (if no paid visits, please enter 0)

Q3 Are these exact numbers or an estimate?

Figure given for total visits numbers in 2019

Exact

Estimate

Figures given for visits numbers in 2019 for paid visits only

Q4 Compared to 2018, did your total visit numbers increase, stay the same or decrease in 2019?

- Increased
- Stayed the same
- Decreased
- Don't know

Q5 If your visitor numbers increased or decreased in 2019, what factors do you think caused this?

Q6 What method(s) did you use for recording / estimating visitor numbers in 2019?

Please tick all that apply

- From ticket sales and/or group booking sales
- Mechanical or electronic method of counting (e.g. turnstile)
- Manual method of counting numbers
- Estimate only on the basis of sample count
- Estimate only
- Other

Please specify 'other'

Q7 What percentage of visitors in 2019 (paid and free) were:

Adults % _____
Children % _____

Q8 Are these exact numbers or an estimate?

	Exact	Estimate
Figure given for adults %	<input type="checkbox"/>	<input type="checkbox"/>
Figure given for children %	<input type="checkbox"/>	<input type="checkbox"/>

Q9 What percentage of your total visitors, in 2019, were visiting in organised groups or tours?

Q10 Is this an exact number or an estimate?

- Exact
- Estimate

Q11 Did you charge for admission to the main attraction in 2019?

- Yes
- No

Q12 What was the standard admission charge (in high season/ summer) per person for the main attraction in 2019 (including VAT)?

Please enter 0 if no charge or not applicable

Adults £ _____
Child £ _____
Car parking fee £ _____

Q13 What percentage of visitors in 2019 were from:

Overseas % _____
Wales % _____
Rest of the UK (excl. Wales) % _____

Q14 Are these exact numbers or estimates?

- Exact
- Estimate

Q15 Were you open for the whole of 2019 (that is every month)?

- Yes
- No

Q16 Which months were you open in 2019?

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

Operations (2019)

Q17 How did the attraction's gross revenue in 2019 compare with 2018?

- Up
- Similar
- Down

Q18 If known, what was the percentage increase in 2019?

Percentage increase % _____

Q19 If known, what was the percentage decrease in 2019?

Percentage decrease % _____

Human resources (2019)

Q20 How many people were employed in any visitor-related activities in the attraction in 2019, including yourself, working owners, self-employed and/or any volunteers?

Please enter numbers only

Permanent full-time	_____
Permanent part-time	_____
Seasonal full-time	_____
Seasonal part-time	_____
Volunteers full-time	_____
Volunteers seasonal	_____

Q21 Are these exact numbers or estimates?

- Exact
- Estimate

Marketing (2019)

Q22 Compared with 2018, was expenditure on marketing activities in 2019:

- Up
- Down
- Similar

Impact of COVID-19 (2020)

Thank you for completing your figures for 2019. This section now asks about 2020.

Q23 Can you provide exact or best estimate figures for 2020?

If you can't provide figures for 2020 then we will contact you again later when, hopefully, you will be able to provide us with this data.

- Yes
- No

GO TO END/ Q50

Q24 So that we can better understand the effect of COVID-19 on your business, can you please tell us whether you are classed as an indoor, outdoor or underground attraction?

- Indoor
- Outdoor
- Both - indoor and outdoor
- Underground

Q25 Were you open for the whole of 2020 (that is every month)?

- Yes
- No

Q26 Which months were you open in 2020?

- | | |
|-----------------------------------|---|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |
| | <input type="checkbox"/> None – closed all year |
- Go to Q46, but don't ask Q49.*

Q27 Did you choose to close at any point, at a time that you would normally have been and were allowed to be open?

- Yes - we chose to close because of COVID-19
- Yes - we chose to close but for reasons unrelated to COVID-19
- No - we chose to stay open whenever we were allowed to do so

Q28 At what percentage of your normal capacity level have you been operating at, on average, when open during the pandemic?

- Open at full capacity
- 90 – 99%
- 80 – 89%
- 70 – 79%
- 60 – 69%
- 50 – 59%
- 40 – 49%
- 30 – 39%
- 20 – 29%
- 10 – 19%
- Less than 10%

Visitors (2020)

Q29 What were the visitor numbers to your attraction during the 2020 calendar year?

Please exclude special events outside normal opening hours or any private hire. If a leisure or fitness facility, please exclude gym or fitness class members, if possible. If a theatre, please exclude theatre goers, if possible.

Please leave out any commas, e.g. enter 1000 rather than 1,000

Total visits numbers in 2020 (paid and free combined) _____
Visits numbers in 2020 for paid visits only (if no paid visits, please enter 0) _____

Q30 Are these exact numbers or an estimate?

	Exact	Estimate
Figure given for total visits numbers in 2020	<input type="checkbox"/>	<input type="checkbox"/>
Figures given for visits numbers in 2020 for <u>paid visits only</u>	<input type="checkbox"/>	<input type="checkbox"/>

Q31 Compared to 2019, did your total visit numbers increase, stay the same or decrease in 2020?

- Increased
- Stayed the same
- Decreased
- Don't know

Q32 If your visitor numbers increased in 2020, what factors do you think caused this?

Q33 If your visitor numbers decreased in 2020, please explain the factors resulting from COVID-19 that caused this.

Please also explain any factors unrelated to COVID-19, if any.

Q34 What method(s) did you use for recording / estimating visitor numbers in 2020?

Please tick all that apply

- From ticket sales and/or group booking sales
- Mechanical or electronic method of counting (e.g. turnstile)
- Manual method of counting numbers
- Estimate only on the basis of sample count
- Estimate only
- Other

Please specify 'other'

Q35 What percentage of visitors in 2020 (paid and free) were:

Adults % _____
Children % _____

Q36 Are these exact numbers or an estimate?

	Exact	Estimate
Figure given for adults %	<input type="checkbox"/>	<input type="checkbox"/>
Figure given for children %	<input type="checkbox"/>	<input type="checkbox"/>

Q37 What percentage of your total visitors, in 2020, were visiting in organised groups or tours?

Q38 Is this an exact number or an estimate?

- Exact
- Estimate

Q39 Did you charge for admission to the main attraction in 2020?

- Yes
- No

Q40 What was the standard admission charge (in high season/ summer) per person for the main attraction in 2020 (including VAT)?

Please enter 0 if no charge or not applicable

Adults £ _____
Child £ _____
Car parking fee £ _____

Q41 What percentage of visitors in 2020 were from:

Overseas % _____
Wales % _____
Rest of the UK (excl. Wales) % _____

Q42 Are these exact numbers or estimates?

- Exact
- Estimate

Operations (2020)

Q43 How did the attraction's gross revenue in 2020 compare with 2019?

- Up
- Similar
- Down

Q44 If known, what was the percentage increase in 2020?

Q45 If known, what was the percentage decrease in 2020?

Human resources (2020)

Q46 How many people were employed in any visitor-related activities in the attraction in summer 2020, including yourself, working owners, self-employed and/or any volunteers?

Please include all staff who are employed, i.e. including those on furlough.

Please enter numbers only

Permanent full-time _____
Permanent part-time _____
Seasonal full-time _____
Seasonal part-time _____
Volunteers full-time _____
Volunteers seasonal _____

Q47 How many staff from any visitor-related activities in the attraction have been on furlough in 2020?

Q48 Are these exact numbers or estimates?

- Exact
- Estimate

Marketing (2020)

Q49 Compared with 2019, was expenditure on marketing activities in 2020:

- Up
- Down
- Similar

Q50 Do you have any further comments you would like to add?

Appendix II: Visit Numbers 2017 - 2020

Name	2017	2018	2019	2020
123 Jump Ltd		110,000	101,177	29,553
1940s Swansea	10,345	10,500	10,500	4,000
Aberconwy House	22,773	21,682	20,884	289
Aberdulais Tin Works and Waterfall	30,301	28,478	26,214	629
Aberglasney Gardens	35,000		40,000	16,000
Abertillery & District Museum Society			5,470	664
Aberystwyth Cliff Electric Railway	64,000	80,000	85,000	40,000
Aberystwyth University School of Art Museum and Galleries	11,000	9,000	35,000	3,500
AirWorld Aviation Museum (Caernarfon Air World)	7,299	6,725	9,758	790
Alyn Waters Country Park			258,764	258,764
Amelia Trust			20,000	
Amgueddfa'r Mor Porthmadog Maritime Museum			6,766	
Ancre Hill Vineyard			4,000	
Andrew Logan Museum of Sculpture	1,800	5,000	320	
Anglesey Model Village			17,576	4,292
Atlantic Arts Centre		942	6,000	100
Attic Gallery		5,000	1,500	
Battlefield Live Pembrokeshire		3,000	2,020	42
Beaumaris Castle	90,807	98,827	81,588	15,965
Big Pit National Coal Museum	141,969	146,791	140,466	16,943
Blaenavon Ironworks	39,366	35,500	14,119	2,822
Blaenavon World Heritage Centre	42,228	40,470	41,489	1,058
Bluestone Brewing Company		5,000	12,000	
Bodafon Farm Park			20,000	9,000
Bodnant Garden	255,949	260,153	271,339	106,728
Bodrhyddan Hall	1,500	3,600	1,756	
Brecknock Museum & Art Gallery			4,582	32,520
Brynmawr & District Museum			3,500	
Bwlch Nant yr Arian Visitor Centre	119,202		138,000	80,000
Byd Mary Jones World	3,300	2,894	2,798	
Cadair Idris Visitor Centre	57,166	6,000	3,184	
Cae Hir Gardens			2,928	
Caerau Gardens		2,000	6,000	2,500
Caerleon Roman Fortress and Baths	61,208	56,332	38,631	2,261
Caernarfon Castle	204,675	205,009	199,074	25,321
Caerphilly Castle	143,869	108,315	96,628	17,871
Caldicot Castle & Country Park	60,000		140,000	

Name	2017	2018	2019	2020
Canolfan Rhiannon		8,000	9,500	3,000
Canolfan Ucheldre Centre			26,319	7,244
Canolfan y Celfyddydau Aberystwyth Arts Centre		600,000	658,088	55,580
Canolfan Y Plase			1,840	
Cantref Adventure Farm		33,400	38,000	17,000
Cardiff Boat Tours			78,000	5,500
Cardiff Castle	319,131	452,007	502,224	195,930
Cardiff Open Top Tour Buses		34,980	37,000	10,000
Cardiff Waterbus			77,828	
Cardigan Bay Marine Wildlife Centre	18,635		16,898	109
Carew Castle	48,744	47,221	42,937	12,576
Carmarthen Castle	23,534	18,862	19,247	
Carmarthenshire Museum	11,641	9,669	10,441	525
Castell Coch	75,710	50,511	58,937	8,610
Castell Henllys Iron Age Fort	25,000		17,421	5,482
Cefn Coed Colliery Museum	9,000		10,500	-
Ceredigion Museum	22,974	69,553	110,000	2,800
Chapel Bay Fort & Museum			1,505	
Chepstow Castle	59,781	56,261	58,901	14,982
Chirk Castle and Garden	162,351	171,943	185,480	57,262
Cilgerran Castle	17,385	14,884	24,273	
Clerkenhill Adventure Farm and Frizbee Golf			17,000	10,000
Cloverlands Model Car Museum	950		1,000	6
Coed y Brenin Visitor Center	147,489	137,714	183,991	
Colby Woodland Garden	47,102	93,617	50,927	1,668
Coles				200
Conwy Castle	221,652	201,961	212,364	35,553
Conwy Mussel museum			6,000	3,000
Conwy Suspension Bridge	21,350	18,717	17,324	190
Conwy Water Gardens		55,000	51,000	17,000
Copper Kingdom		5,800	5,162	
Corris Railway			5,066	
Cosmeston Lakes Country Park	250,000	250,000	250,000	150,000
Cosmeston Medieval Village	41,645	3,678	3,818	1,367
Craft in the Bay			36,306	9,908
Craig-y-Nos Country Park			254,666	88,337
Criccieth Castle	42,863	47,411	46,083	4,709
Cwm Byddog	750		1,000	900
Cwm Weeg Gardens	601	400	425	100
Cwrw Llyn Cyf		5,000	1,000	1,000

Name	2017	2018	2019	2020
Cyfarthfa Castle Museum and Art Gallery		62,593	56,311	9,537
Cynon Valley Museum & Gallery	8,015	18,100	17,779	4,321
Da Mhile			500	100
Dan yr Ogof, the National Showcaves Centre for Wales		88,162	85,000	20,000
DangerPoint	7,506	7,742	7,500	1,500
Denbigh Castle	10,156	10,623	9,766	8,921
Denmark Farm Conservation Centre	1,000		1,000	600
Devil's Bridge Waterfalls	48,000		59,164	28,750
Dinosaur Park (The)			60,000	42,000
Dolaucothi Gold Mines	26,134	23,887	23,349	
Dyfed Shire Horse Farm	10,000	10,000	11,000	7,000
Dyffryn Fernant			4,600	1,000
Dyffryn Gardens	128,842	141,261	167,389	79,723
Dyfi Osprey Visitor Centre			12,000	
Dylan Thomas Boathouse		29,182	25,000	960
Dylan Thomas Centre	157,685		110,872	17,515
Elan Valley Visitor Centre		202,418	210,259	109,913
Erddig	163,758	172,948	176,874	67,208
Fairbourne and Barmouth Steam Railway			22,000	11,000
Falconry Experience Wales			60,000	
Fantasy farm Park			12,500	
Ffestiniog and Welsh Highland Railways			186,205	
Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	115,339	124,004	117,405	20,000
Folly Farm	480,000	455,428	438,234	203,073
Fonmon Castle				29,345
Fourteen Locks Canal Centre		60,152	65,253	19,774
Fun Centre (The)			80,000	5,000
Garwnant Visitor Centre	99,110	92,587	90,000	56,000
Gigrin Farm			20,000	9,000
Glasfryn Parc Activity Centre			70,000	15,000
Glynn Vivian Art Gallery	42,682		54,141	9,563
Gnoll Estate			150,000	
Golden Grove and Gelli Aur Country Park			10,000	8,500
Gower Coast Adventures			1,882	
Gower Heritage Centre			58,516	16,221
Goytre Wharf Visitor and Activity Centre		40,000	60,000	35,000
Great Orme Mines			31,576	13,176
Great Orme Tramway	205,495	191,613	190,227	

Name	2017	2018	2019	2020
Greenfield Valley Heriatge Park		13,000	17,565	8,167
Gregynog Hall	850	1,800	3,500	
Gwili Steam Railway			31,000	164
Gwinllan Conwy			6,500	
Hangar 5 Trampoline Park			7,500	2,000
Harlech Castle	116,216	108,981	103,246	15,378
High Glanau Manor			1,226	
Hilton Court Gardens and Crafts			30,000	
Holyhead Maritime Museum	4,149	4,861	5,167	
Home Front Museum		10,000	10,000	1,500
Horse Drawn Boat Centre (The)	68,000		68,000	
Hywel Dda Gardens & Interpretive Centre			1,000	
Inigo Jones & Co Ltd	40,000	38,000	15,760	10,000
Joseph Parry's Ironworker's Cottage		441	754	
Kidwelly Castle	39,344	34,519	29,849	3,185
King Arthur's Labyrinth			30,000	
King Street Gallery			7,800	
Kymin (The)	5,938	5,789	6,244	
Lake Vyrnwy Nature Reserve		190,000	182,201	60,000
Lampeter Museum	926	848	3,000	
Last Invasion Tapestry (The)	20,000	12,186	17,000	
Laugharne Castle	13,779	14,619	15,396	3,460
LC Waterpark and Leisure Complex Swansea	796,149	772,000	678,714	185,312
Llanberis Lake Railway			76,741	
Llandaff Cathedral		500	12,260	5,501
Llandegfedd Visitor Centre	175,400	188,720	285,029	180,779
Llandudno Ski and Snowboard Centre			18,000	
Llanerchaeron	48,873	48,354	52,716	8,233
Llanfair Slate Caverns & Farm Park		24,000	22,500	4,500
Llangollen Motor Museum	5,000		5,000	80
Llangollen Museum			22,637	2,619
Llanover Garden			1,100	520
Llantarnam Grange Arts Centre			34,450	13,796
Llantrisant Guildhall			3,000	2,000
Llanyrafon Mill		364	180	50
Llechwedd Slate Caverns			47,000	15,000
Llyn Brenig Visitor Centre		144,180	145,987	86,311
Llyn Maritime Museum / Amgueddfa Morwrol Llŷn			7,000	125
Loggerheads Country Park	250,000		263,000	
Loving Welsh Food			790	

Name	2017	2018	2019	2020
Maesfron Hall and Gardens	2,000		1,500	100
Manobier Castle			19,000	8,978
Manor Wildlife Park	78,562	76,517	83,565	71,625
Manorafon Farm park			46,770	19,311
Menai Heritage		3,500	849	
Mid Wales Arts Gallery & Sculpture Park			11,000	5,000
Milford Haven Heritage & Maritime Museum		2,589	8,400	
Mold Library Museum & Art Gallery			15,000	500
MOMA Machynlleth		22,986	22,690	3,908
Montys Brewery Visitor Centre		8,540	14,000	5,200
Museum of Cardiff		133,421	88,473	37,865
Narberth Museum - The Bonded Stores			2,600	
National Cycle Collection			3,000	2,000
National Museum Cardiff	539,550	488,809	584,256	130,563
National Roman Legion Museum	70,021	54,264	21,712	12,562
National Slate Museum	145,969	141,762	152,903	19,715
National Trust Stackpole		298,496	256,746	129,753
National Waterfront Museum Swansea	268,622	285,340	275,242	52,672
National Wool Museum	36,909	31,383	31,108	4,430
Newport Medieval Ship	2,200		3,500	
Newport Wetlands Visitor Centre & Nature Reserve	114,887	89,516	112,277	75,213
Newton House & Dinefwr Park	87,994	82,370	87,249	8,467
Newtown Textile Museum	1,061	1,422	1,273	205
North Wales Bowls Centre	34,500	24,808	35,219	10,509
Nova Prestatyn		250,000	150,000	
Ocean Lab	3,970	4,436	5,263	1,281
Oneplanet Adventure			147,729	47,030
Oriel Kyffin Williams			78,173	27,915
Oriel Môn, Anglesey		81,812	71,173	15,413
Oriel Mostyn Gallery	80,000		63,877	19,066
Oriel Myrddin gallery	19,609		20,853	320
Oriel Plas Glyn-Y-Weddw Arts Centre	126,567	143,478	120,000	2,500
Oriel Y Parc Visitor Centre & Gallery	136,000	126,000	118,429	36,931
Oxwich Castle	6,233	5,999	5,932	
Oystermouth Castle	25,000		16,000	
Palace Fun Centre			15,600	
Parc Bryn Bach			182,000	52,500
Parc Howard Museum	12,281	10,568	14,778	1,310
Parc Slip Wildlife Trust Visitor Centre			80,000	

Name	2017	2018	2019	2020
Parva Farm Vineyard			5,000	4,000
Pembrey Country Park	470,000	520,000	611,114	405,444
Pembroke Dock Heritage Centre	8,081	8,396	7,982	1,948
Pembrokeshire Candle Centre & Museum	2,000		4,000	2,000
Penderyn Distillery			42,228	19,953
Penrhyn Castle	110,820	118,833	134,896	7,793
Pierhead			112,365	13,287
Plantasia			77,509	49,183
Plas Brondanw Gardens			4,150	1,546
Plas Cadnant Hidden Gardens			22,435	11,000
Plas Mawr	26,904	31,561	35,356	4,236
Plas Newydd	143,206	151,714	155,976	12,000
Plas yn Rhiw	8,637	20,519	23,211	102
Plasley Craft Centre			10,000	3,000
Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	333,363	342,620	410,041	275,336
Pontypool Museum			30,536	
Pontypridd Museum	8,882	22,195	24,913	1,175
Porth y Swnt	14,591	13,428	12,657	489
Porthcawl Museum & Historical Society	9,245	7,859	6,234	436
Portmeirion			245,690	128,596
Powis Castle and Garden	145,325	155,805	184,437	4,031
Quackers	28,000	22,000	29,000	3,120
Raglan Castle	67,046	64,475	66,751	16,248
Raul Speek Gallery			30,000	
Rhayader Tunnel	5,000		7,000	7,000
Rheidol Visitor Centre and Power Station	3,000		800	
Rheilffordd Llyn Tegid / Bala Lake Railway		33,000	33,000	13,000
Rhiw Valley Light Railway	500	500	450	
Rhuddlan Castle	22,532	22,784	20,328	1,264
Rhymney Brewery Visitor Centre			3,600	200
RibRide	15,000		21,299	7,779
Royal Cambrian Academy of Art			30,000	
Royal Welch Fusiliers Museum	112,129		149,213	12,583
RSPB Conwy Nature Reserve		79,850	78,950	30,743
Rug Chapel	2,108	1,342	1,260	
Scolton Manor Museum			95,828	
Seaquarium			61,367	29,463
Senedd Cymru			76,821	12,326
Sirhowy Ironworks			300	-

Name	2017	2018	2019	2020
Snowdon Mountain Railway	130,266	140,000	143,865	29,194
Solva Woollen Mill	20,000		18,822	
South Stack Lighthouse & Visitor Centre - South Stack Ynys Lawd Ltd			20,000	
St Asaph Cathedral			4,318	188
St David's Bishops Palace	26,802	25,412	21,342	2,806
St Davids Cathedral	287,000	272,000	270,000	
St Fagans National Museum of History	553,090	636,859	746,105	112,379
St. Mary's Priory and Tithe Barn			10,000	
Storiol Gwynedd			6,000	
Strata Florida	5,550	7,232	5,083	
Swansea Community Boat - "Copper Jack"	6,000	6,429	8,315	168
Swansea Museum			100,371	661
Swtan Heritage Museum			1,500	
Talylyn Railway			49,344	12,855
Tanat Valley Light Railway			4,000	
Task Force			10,617	2,632
Techniquest	189,000	153,500	164,000	27,500
Teifi Valley Railway			4,500	750
Tenby Museum & Art Gallery	14,514		15,630	3,000
The Anglesey Sea Salt Company Halen Mon			29,130	284
The Animalarium			23,350	6,824
The Castle and Regimental Museum, Monmouth		4,861	4,407	
The Gate		27,222	27,219	5,275
The Magic of Life Butterfly House			12,903	6,028
The Mushroom Garden			190	30
The National Botanic Garden of Wales		161,129	163,096	91,610
The National Coracle Centre	2,270	2,270	2,115	
The Play Barn			27,746	7,000
The Play King			75,000	15,000
The Regimental Museum of The Royal Welsh	8,599	10,217	8,147	3,291
The Royal Mint Experience	93,850	75,000	82,714	20,434
The Spaceguard Centre	2,422		2,419	259
The Vale of Rheidol Railway Ltd		60,000	53,972	860
Thomas Shop & Museum (The)		2,500	3,000	1,300
Tintern Abbey	74,497	74,613	71,105	12,312
Tir Prince Fun Park		900,000	1,000,000	
Tredeggar House	89,194	80,457	89,529	2,556
Trefriw Woollen Mills Ltd			40,214	15,693
Tretower Court and Castle	14,704	13,274	12,452	1,427

Name	2017	2018	2019	2020
Tudor Merchant's House	25,185	25,066	27,414	796
Tŷ Mawr Country Park Visitor Centre	75,000		41,655	4,141
Tŷ Mawr Wybrnant	4,015	3,794	3,125	
Ty Pawb			100,000	
Upton Castle Gardens			1,800	
Usk Castle	8,532		6,754	203
Valle Crucis Abbey	6,395	5,690	5,735	
Wales Ape and Monkey Sanctuary			30,457	13,000
Wales Millennium Centre	1,082,494	1,762,281	1,142,706	203,552
Walkers on Snowdon		755,096	806,974	472,124
Welsh Mountain Zoo	151,152	159,522	163,299	97,770
Welsh Royal Crystal			3,000	300
Welsh Wildlife Centre		80,000	25,000	
Welshpool & Llanfair Light Railway	35,000	35,000	29,000	7,500
West Wales Arts Centre			30,000	5,000
White Castle Vineyard	1,500	1,000	2,600	1,000
Wickedly Welsh Chocolate (The)			30,000	
Wiggleys Fun Farm			60,000	10,000
Wildlife Seawatch			43,000	
Wireless in Wales / Gwefr heb Wifrau	300		200	10
Workhouse History Centre	2,850	2,400	3,000	300
Wrexham County Borough Museum	45,626	34,412	28,955	7,905
WWT Llanelli Wetland Centre	70,000	68,460	69,785	
Y Lanfa Powysland Museum and Welshpool Library			1,476	14
Ynys Las Visitor Centre - National Nature Reserve	119,541	70,885	126,111	120,000
Ynys-hir Nature Reserve		15,901	15,812	5,685
Zip World Forest		195,000	223,500	121,035
Zip World Penrhyn Quarry		122,000	145,000	80,600
Zip World Slate Caverns		195,000	179,000	46,000

Appendix III: Top ten attractions by region (2019)

Top ten attractions in Mid Wales (2019)

Name	Paid / Free	Category	Owner	No. of visits 2019
1 Canolfan y Celfyddydau Aberystwyth Arts Centre	No	MAG	PO	658,088
2 Elan Valley Visitor Centre	No	WL	DCWW	210,259
3 Powis Castle and Garden	Yes	HP	NT	184,437*
4 Lake Vyrnwy Nature Reserve	No	WL	RSPB	182,201*
5 Bwlch Nant yr Arian Visitor Centre	No	WL	NRW	138,000*
6 Ynys Las Visitor Centre - National Nature Reserve	No	WL	NRW	126,111
7 Ceredigion Museum	No	MAG	LA/NP	110,000*
8 Aberystwyth Cliff Electric Railway	Yes	R/T	PO	85,000*
9 Falconry Experience Wales	Yes	WL	PO	60,000*
10 Devil's Bridge Waterfalls	Yes	CP	PO	59,164*

Top ten attractions in North Wales (2019)

Name	Paid / Free	Category	Owner	No. of visits 2019
1 Tir Prince Fun Park	No	Theme	PO	1,000,000*
2 Walkers on Snowdon	No	WL	LA/NP	590,984
3 Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	No	HP	PO	410,041*
4 Bodnant Garden	Yes	CP	NT	271,339
5 Loggerheads Country Park	No	CP	LA/NP	263,000*
6 Alyn Waters Country Park	No	CP	LA/NP	258,764*
7 Portmeirion	Yes	HP	PO	245,690
8 Zip World Forest	Yes	A/A	PO	223,500*
9 Conwy Castle	Yes	HP	Cadw	212,364
10 Caernarfon Castle	Yes	HP	Cadw	199,074

Top ten attractions in South East Wales (2019)

Name	Paid / Free	Category	Owner	No. of visits 2019
1 Wales Millennium Centre	No	MAG	PO	1,142,706*
2 St Fagans National Museum of History	No	MAG	AC-NMW	746,105
3 National Museum Cardiff	No	MAG	AC-NMW	584,256
4 Cardiff Castle	Yes	HP	LA/NP	502,224*
5 Llandegfedd Visitor Centre	No	WL	DCWW	285,029
6 Craig-y-Nos Country Park	No	CP	LA/NP	254,666
7 Cosmeston Lakes Country Park	No	CP	LA/NP	250,000*
8 Parc Bryn Bach	No	A/A	PO	182,000*
9 Dyffryn Gardens	Yes	CP	NT	167,389
10 Big Pit National Coal Museum	No	MAG	AC-NMW	140,466

Top ten attractions in South West Wales (2019)

Name	Paid / Free	Category	Owner	No. of visits 2019
1 LC Waterpark and Leisure Complex Swansea	Yes	Theme	PO	678,714*
2 Pembrey Country Park	No	CP	LA/NP	611,114
3 Folly Farm	Yes	Farm	PO	438,234
4 National Waterfront Museum Swansea	No	MAG	AC-NMW	275,242
5 St David's Cathedral	No	HP	PO	270,000*
6 Stackpole Nature Reserve	No	WL	NT	256,746
7 The National Botanic Garden of Wales	Yes	CP	PO	163,096
8 Gnoll Estate	No	CP	LA/NP	150,000*
9 Oriel Y Parc Visitor Centre & Gallery	No	MAG	LA/NP	118,429
10 Dylan Thomas Centre	No	OTH	LA/NP	110,872

Appendix IV: Top ten attractions by region (2020)

Top ten attractions in Mid Wales (2020)

Name	Paid / Free	Category	Owner	No. of visits 2020
1 Ynys Las Visitor Centre - National Nature Reserve	No	WL	NRW	120,000*
2 Elan Valley Visitor Centre	No	WL	DCWW	109,913
3 Bwlch Nant yr Arian Visitor Centre	No	WL	NRW	80,000*
4 Lake Vyrnwy Nature Reserve	No	WL	RSPB	60,000*
5 Canolfan y Celfyddydau Aberystwyth Arts Centre	No	MAG	PO	55,580
6 Aberystwyth Cliff Electric Railway	Yes	R/T	PO	40,000*
7 Brecknock Museum & Art Gallery	No	MAG	LA/NP	32,520
8 Devil's Bridge Waterfalls	Yes	CP	PO	28,750*
9 Cantref Adventure Farm	Yes	HP	PO	17,000*
10 Gigrin Farm	Yes	WL	PO	9,000*

Top ten attractions in North Wales (2020)

Name	Paid / Free	Category	Owner	No. of visits 2020
1 Walkers on Snowdon	No	WL	LA/NP	329,258
2 Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	No	HP	PO	275,336*
3 Alyn Waters Country Park	No	CP	LA/NP	258,764*
4 Portmeirion	Yes	HP	PO	128,596
5 Zip World Forest	Yes	A/A	PO	121,035*
6 Bodnant Garden	Yes	CP	NT	106,728
7 Welsh Mountain Zoo	Yes	WL	PO	97,770
8 Llyn Brenig Visitor Centre	No	WL	DCWW	86,311
9 Zip World Penrhyn Quarry	Yes	A/A	PO	80,600*
10 Erddig	Yes	HP	NT	67,208

Top ten attractions in South East Wales (2020)

Name	Paid / Free	Category	Owner	No. of visits 2020
1 Wales Millennium Centre	No	MAG	PO	203,552*
2 Cardiff Castle	Yes	HP	LA/NP	195,930
3 Llandegfedd Visitor Centre	No	WL	DCWW	180,779
4 Cosmeston Lakes Country Park	No	CP	LA/NP	150,000*
5 National Museum Cardiff	No	MAG	AC-NMW	130,563
6 St Fagans National Museum of History	No	MAG	AC-NMW	112,379
7 Craig-y-Nos Country Park	No	CP	LA/NP	88,337
8 Dyffryn Gardens	Yes	CP	NT	79,723
9 Newport Wetlands Visitor Centre & Nature Reserve	No	WL	RSPB	75,213
10 Garwnant Visitor Centre	No	CP	NRW	56,000*

Top ten attractions in South West Wales (2020)

Name	Paid / Free	Category	Owner	No. of visits 2020
1 Pembrey Country Park	No	CP	LA/NP	405,444
2 Folly Farm	Yes	Farm	PO	203,073
3 LC Waterpark and Leisure Complex Swansea	Yes	Theme	PO	185,312*
4 Stackpole Nature Reserve	No	WL	NT	129,753
5 The National Botanic Garden of Wales	Yes	CP	PO	91,610
6 Manor Wildlife Park	Yes	WL	PO	71,625
7 National Waterfront Museum Swansea	No	MAG	AC-NMW	52,672
8 Plantasia	Yes	A/A	PO	49,183
9 Dinosaur Park (The)	Yes	A/A	PO	42,000*
10 Oriol Y Parc Visitor Centre & Gallery	No	MAG	LA/NP	36,931