Visits to Tourist Attractions in Wales 2017

Report for Visit Wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.
This document is also available in Welsh.

Visits to Tourist Attractions in Wales – 2017
Research on behalf of Visit Wales

Fiona McAllister, Beaufort Research Ltd.

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

Contents   Page

Glossary of acronyms and how to read the tables

Visit Wales and Beaufort Research would like to thank all representatives and operators in the attraction sector that provided information for the survey on which this report is based. Without their assistance every year 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.

If visit figures were estimated by operators, this is indicated with an asterisk (*) following the number of visits in 2017 in section 8 towards the end of the report.

Admission

If an attraction has an admission charge, the adult admission charge for high season 2017 is given. If this is not known the charge is left blank.

Abbreviations

CATEGORY	ACRONYM	EXPLANATION
Regions	M	Mid Wales
	N	North Wales
	SE	South East Wales
	SW	South West Wales
Ownership	Cadw †	Cadw (Welsh Historic Monuments)
	LA	Local Authority
	AC - NMW	Amgueddfa Cymru – National Museums Wales
	NRW	Natural Resources Wales
	NT †	National Trust
	PO	Privately owned (private individual owners, organisation / trust etc.)
	RSPB	The Royal Society for the Protection of Birds
Tourist attractions	A / A	Adventure / activity attraction
	CP	Country park, garden, other natural
	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

†Attractions in the Cadw or National Trust ownership categories may only be managed by such organisations.

Throughout the report, samples of ten or below are highlighted in red to denote the need for caution to be applied when interpreting the results.

Executive summary

i. Visits 2017

- 18.6 million visits were made to attractions in Wales taking part in the 2017 survey: 61% of these visits were made to attractions with free admission and 39% to attractions where an admission change applies.

- As most major attractions participate in the survey, it is estimated the total volume of visits recorded accounts for well over 80% of the grand total of visits to all attractions in Wales. Amongst all attractions responding to the survey, the 23 reporting 200,000 or more visitors accounted for almost half of all visits recorded in 2017.

- Participating attractions in North Wales received the highest share of visits in 2017 (39.5%), while attractions in Mid Wales received the lowest (5.5%).

- Each attraction responding to the survey received an average of 78,620 visits in 2017: the average number of visits was highest (at 105,177) in South East Wales, and lowest (at 22,964) in Mid Wales.

- Historic properties and museums and art galleries received the highest proportion of visits overall (with each accounting for around 20% of all visits).

- Almost four in ten visits to attractions in Wales in 2017 (39.7%) were made to privately owned attractions (3.8 million to free and 3.6 million to paid).

ii. Visits 2016 - 2017

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2016 and 2017 figures. Please note that this section only relates to those attractions that provided data **in both years** (143 attractions).

- Visits to these attractions rose by 7.1% from 2016 to 2017.

- Free attractions saw the largest increase in visit numbers year on year, with a rise of 9.8% (8.08 million to 8.87 million), while visits to paid attractions rose by 3.6% (6.05 million to 6.26 million).

- Visitor numbers increased at attractions in all areas of Wales except the South West, where there was a small decrease of 2.3% from 2016 to 2017; North Wales saw the highest increase year on year (of 14%).

- Visits to privately owned attractions increased by 13.7% from 2016 to 2017, while Amgueddfa Cymru – National Museum Wales, Cadw, Local Authority and RSPB attractions also saw sizeable increases. In contrast, visits to Natural Resources Wales sites declined by 10.7% year on year.

- Average adult admission charges rose by just over 4% from 2016 to 2017 to £9.03 (up from £8.65 in 2016); child admission prices also rose by a similar margin (from £5.13 in 2016 to £5.35 in 2017).

- Adult admission charges were highest in North Wales (average £9.70), and lowest in South West Wales (average £6.45). In terms of attraction category, adventure / activity attractions charged the highest adult admission prices (average £18.40), while museums and art galleries charges were lowest (average of £4.53).

iii. Operations

- Nearly half of participating attractions (47%) reported an increase in gross revenue in 2017 compared with 2016, while another four in ten said their revenue was similar; only around one in eight reported their gross revenue had fallen year on year (down from one in five in 2016).

- Overall, participating attractions reported an increase of 3.1% in gross revenue in 2017 compared with 2016. Country parks and gardens saw the highest increase (+11.7%), followed by wildlife / nature reserves (+9.1%), science / technology centres (+8%) and food or drink attractions (+7.5%).

- Turning to staffing, as in 2016 unpaid volunteers accounted for the largest proportion of workers at attractions participating in the 2017 survey (63%). Full-time staff accounted for just over one in five (20.7%) workers in 2017, while part-time staff made up a slightly lower proportion (16.3%).

- Most attractions saw no change in their marketing expenditure in 2017 compared with 2016, with around three in four (75.4%) reporting it was similar. Another 13% said it had risen year on year while 11.6% reported a decline.

iv. Visitor profile

- For all attraction types except for the 'Other' category (which included two indoor activity centres), the majority of visitors were adults (71.6%). Food or drink attractions, industrial / craft attractions and museums and galleries

received the highest proportion of adult visitors, while 'other' attractions and science / technology centres were most likely to attract children.

- Almost half of visitors to participating attractions in Wales in 2017 were local visitors (45.3%), with four in ten (40.1%) coming from the rest of the UK and around one in ten (10.7%) from overseas.

- Historic properties and country parks / gardens received the highest proportion of overseas visitors in 2017, while the one themed attraction in the sample, farm / rare breeds, food or drink attractions, adventure / activity attractions and wildlife or nature reserves were most likely to attract local visitors. Railway / tramway / transport attractions received the highest proportion of visitors from the rest of the UK.

- Organised groups or tours accounted for an average of 13.1% of all visits to participating attractions in 2017. The proportion of visitors in groups / tours was much higher than average for science / technology centres and the 'other' attractions category (at 42% and 36.7% respectively).

1.   Introduction

1.1   Background

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

- Determine and report visit numbers to attractions throughout Wales

- Analyse collected data on visit numbers to identify current trends

- Provide additional comparative analysis of data contained in the survey including visit figures, operations, revenue, marketing and human resources

- Analyse data according to attraction categories, the four economic regions of Wales, and admission charging policy (free vs. paid).

1.2   Tourist attraction definition

The research uses the tourist attraction definition[1] agreed upon by the four National Tourist Boards for the 2001 survey whereby a tourist attraction is:

"…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."

---

[1] 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 taken into account when comparing with other entries.

1.3   Objectives

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.

1.4   Economic and climatic background to 2017

The UK economy and climate are both key factors in domestic tourism and their impact will be reflected in the figures in this report.

UK economic summary for 2017

The year as a whole saw migration fall and the economy slow following the Brexit referendum in June 2016.

Growth in the UK economy fell back to 1.7% in the first three quarters of 2017 which saw it fall to the bottom of the G7 nations. The manufacturing sector saw a marked improvement in this period, however, showing growth of 3.3% from October 2016 to 2017, due to strong demand from overseas buyers following the depreciation of sterling and a pick-up in global growth. Net migration to the UK over the year to June 2017 fell to 230,000, more than 100,000 lower than during the 12 months before the Brexit referendum.

Bank of England base rate rose by 0.25% in November to 0.5%, the first interest rate rise in the UK in more than a decade, triggered by rising inflation. Interest rates remained at a historically low level, however. Inflation over the year to November rose to 3.1% and was its highest level since March 2012, with the depreciation of sterling since the Brexit vote feeding through to higher prices in the shops. Wage growth failed to pick up, even though unemployment fell to a 42-year low of 4.3% in the year.

House prices rose by 4.5% across the UK over the year to October 2017, taking the average house price to £223,807, according to the official house price index published by the Office for National Statistics.

2017 saw a record level of international visitors to the UK, with over 39.2 million trips spending a record £24.5 billion. During the year there were 1.08 million trips taken in Wales by overseas visitors, an increase of 0.5 percent compared with 2016. However, spending on trips to Wales was lower in 2017 than 2016.

Overnight trips to Wales and spend by GB residents fell in 2017 to just over 9 million trips and £1.6 million spent, continuing the trend in 2016. This follows 3 years of strong growth between 2013 and 2015. There was an increase in overnight holiday trips taken across GB as a whole, however, with over 59 million domestic holidays taken by GB residents in 2017, exceeding the previous peak level of staycations in 2009.

Spend on tourism day visits to Wales by GB residents increased in 2017 to £4.3 billion, the highest level of spending since 2012. The volume of day trips to Wales fell slightly in 2017, with just under 100 million trips taken in the year. The number of tourism day visits and spend in GB as a whole both fell in 2017.

Wales' tourism businesses reported a positive performance in 2017, with more businesses reporting increases in visitor numbers and profitability than did so in 2016.

Climatic summary for 2017

2017 as a whole was rather warmer than average for the UK, making it the fifth warmest year since Met Office records began in 1910. The months from February to June were all warmer than average, whereas the second half of the year saw temperatures nearer to average, with the exception of a warm October. A hot spell in June saw the highest temperatures in that month for over 40 years.

Most places were within 10% of the yearly average for rainfall; it was rather drier across central and northern Scotland and many central and southern parts of England, but somewhat wetter in west Wales and north-west England. 2017 was a slightly sunnier than average year for the UK as a whole, with sunshine above average in the north and east, but slightly below average in some western fringes. Sunnier-than-average months included January, March, May, November and December, whereas February and October were dull.

2. Methodology

2.1 Conducting the research

Fieldwork for the 2017 survey was conducted between May to early July 2018. Fieldwork was not started until after the Easter period when some of the smaller attractions open for the season. Before fieldwork began, some refreshment of the attractions database was conducted to ensure it was as up-to-date as possible and included email addresses and contact details for all attractions.

For 2017 the majority of fieldwork was conducted via an online survey, although a few attractions chose to email back a completed form or to answer the questions over the phone.

A link to the online survey was distributed to all 490 individual attractions on the database by email on 9 May 2018. Appended to the email was a form detailing the information that they would be asked for in the survey, so that attractions could make sure it was to hand before starting the survey. This was followed by two stages of email reminders and two stages of telephone reminders to help maximise response during late May and June. The survey and all survey materials were available in English and Welsh.

In addition, Beaufort made independent efforts to boost response, by contacting organisations with large numbers of attractions in Wales separately for visitor figures. These included Amgueddfa Cymru - National Museum Wales, Cadw, National Trust, Natural Resources Wales and RSPB Cymru. In total these organisations provided data for 81 attractions.

The survey was closed on 2 July 2018, with analysis of responses taking place after this point.

The questionnaire was based on the questionnaire used in previous years to ensure comparability and the ability to monitor trend data, although there were a few minor changes from 2016 (see Appendix I).

2.2 Survey distribution and response rate

A total of 571 attractions believed to fit the tourist attraction definition were invited to take part. The response rates for this year and earlier years are given in Table 2.1 overleaf:

Table 2.1: Response rate

	2017	2016*	2014	2013	2012
Total attractions contacted	571	609	478	478	481
Attractions completing the survey	237 (42%)	216 (35%)	146 (30%)	173 (36%)	190 (40%)
Attractions unable to provide figures	1 (0.2%)	N/A	9 (2%)	10 (2%)	25 (5%)
TOTAL RESPONSE RATE	**238** **(42%)**	**216** **(35%)**	**155** **(32%)**	**183** **(38%)**	**215** **(47%)**

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

The response to the survey in 2017 was 42%, higher than in any year since 2012, and the survey returns at 238 are the highest since 2009. 237 of the 238 attractions responding to the 2017 survey were able to provide visit numbers. A further attraction provided data too late to be included in the calculations in the main body of the report, but their visit numbers for 2017 are listed in Appendix II for completeness.

In order to assess the reliability of visit figures provided, 225 of the 237 operators providing data indicated which methods they used to calculate their figures: results are shown in Table 2.2 below. The figures amount to more than 100% as multiple methods are mentioned by some attractions.

Table 2.2: Visitor numbers – recording method

Method used 2017	Number of attractions	% of attractions providing data
Ticket sales and / or group booking sales	95	42.2%
Manual counting	76	33.8%
Mechanical / electronic counting	51	22.7%
Estimate only	17	7.6%
Estimate made on basis of sample count	8	3.6%
Other*	22	9.8%

Base: attractions providing data on counting methods (225)
* Other methods include sum of car park x 2, sum of bikes and walkers and tearoom sales
NB: more than one recording method can be recorded

3.   Top ten free and paid attractions

3.1   Top ten paid attractions

The paid attraction reporting the highest number of visitors in 2017, as in previous years, was The LC Waterpark & Leisure Complex in Swansea (796,149 visitors). Visitor numbers to the LC increased by 1.5% in 2017 from 784,522 in 2016.

Six of the top ten paid visitor attractions in 2017 were located in North Wales, with two in South West Wales and two in South East Wales. Four of the ten were privately owned, while the remaining six were owned by local authorities, Cadw and National Trust (with two apiece).

Four of these top ranking attractions are historic properties and two are science / technology attractions. The remainder comprise a mix of themed and farm attractions, a country park and a railways / tramway / transport attraction.

The top ten paid attractions providing data for 2017 received a total of almost 3.1 million visitors, accounting for 42% of all visits made to paid attractions in 2017 - see Table 3.1 below for more details.

Table 3.1: Top ten paid attractions 2017

	Name	Region	Category	Owner	No. of visits 2016	No. of visits 2017	% change	£ Adult
1	LC Waterpark & Leisure Complex	SW	THEME	PO	784,522	**796,149**	+1.5%	£7.00
2	Folly Farm	SW	FARM	PO	490,000	**480,000**	-2.0%	£14.00
3	Cardiff Castle	SE	HP	LA	301,349	**319,131**	+5.9%	£13.00
4	Bodnant Garden	N	CP	NT	242,898	**255,949**	+5.4%	£14.60
5	Electric Mountain Visitor Centre	N	SC/T	PO	NP*	**250,000**	-	£9.00
6	Conwy Castle	N	HP	Cadw	208,887	**221,652**	+6.1%	£8.95
7	Great Orme Tramway	N	R/T	LA	208,850	**205,495**	-1.6%	£7.50
8	Caernarfon Castle	N	HP	Cadw	195,151	**204,675**	+4.9%	£8.95
9	Techniquest	SE	SC/T	PO	190,000	**189,000**	-0.5%	£8.00
10	Erddig	N	HP	NT	162,911	**163,758**	+0.5%	£8.80

* NP = not provided

3.2 Top ten free attractions

Of the free admittance attractions providing data in 2017, the Wales Millennium Centre received the highest number of visitors (almost 1.1 million); visit numbers in 2017 at this attraction had fallen by 14.6% from their 2016 level, however.

The top ten free attractions in 2017 were a mix of museums and galleries, country parks, historic properties, wildlife and nature reserves and one visitor centre (categorised as 'Other').

The top ten free attractions providing data for 2017 received a total of just over 5 million visitors and accounted for almost 45% of all visits made to free attractions in the year - see Table 3.2 below for more details.

Table 3.2: Top ten free attractions 2017

	Name	Region	Category	Owner	No. of visits 2016	No. of visits 2017	% change
1	Wales Millennium Centre2	SE	MAG	PO	1,264,458	1,082,494	-14.6%
2	Snowdon Summit Visitor Centre	N	CP	PO	465,000	654,077	+40.7%
3	St Fagans National Museum of History	SE	MAG	AC - NMW	504,402	553,090	+9.7%
4	National Museum Cardiff	SE	MAG	AC - NMW	509,981	539,550	+5.8%
5	Pembrey Country Park	SW	CP	LA	491,641	470,000	-4.4%
6	Newborough National Nature Reserve	N	WL	NRW	492,259	449,771	-4.5%
7	Pontcysyllte Acqueduct	N	HP	PO	NP*	333,363	-
8	Cardiff Visitor Centre	SE	OTHER	LA	277,712	322,671	+16.2%
9	Gwydir Forest Park	N	WL	NRW	NP*	317,405	-
10	St David's Cathedral	SW	HP	PO	271,700	287,000	+5.7%

* NP = not provided

---

2 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 the 2017 Attractions Report, whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

4.   Visits 2017

This section presents an analysis of the visits data for 2017.

Please note: not all base sizes are the same, as not all respondents completed all sections of the questionnaire. Those **not** completing the relevant sections have been omitted from the tables **but included** elsewhere in sections where they have provided data.

There were 18.6 million visits made to attractions in Wales participating in the survey in 2017; six in ten of these were made to free attractions (61%) with the remaining four in ten made to paid attractions (39%). The dominance of free attractions reflects the situation in previous years.

As most major attractions participate in the survey, it is estimated that the total volume of visits recorded accounts for well over 80% of the grand total of visits to all attractions in Wales. Amongst all attractions responding to the survey, the 23 reporting 200,000 or more visitors accounted for almost half of all visits recorded in 2017 (48.7%) – see Table 4.1 below.

Table 4.1: Overall visits by admission type 2017

Admission type	Base	No. of visits 2017	% of visits
Free	117	11,309,560	60.7%
Paid	120	7,323,474	39.3%
TOTAL	**237**	**18,633,034**	100.0%

Base: attractions providing data for 2017

Participating attractions in North Wales and South East Wales received the highest share of visits (at 39.5% and 33.9% respectively), while attractions in Mid Wales received the lowest (5.5%).

In most regions the split between free and paid visits was fairly even; in South East Wales, however, almost three times as many visits were made to free attractions than to paid attractions (4.7 million visits compared with 1.6 million) - see Table 4.2 overleaf for more details.

Table 4.2: Overall visits by admission type and Wales region 2017

Wales region	Free			Paid			ALL		
	Base	No. of visits 2017	%	Base	No. of visits 2017	%	Base	No. of visits 2017	%
Mid	22	534,567	2.9%	23	498,827	2.7%	45	1,033,394	5.5%
North	35	4,304,566	23.1%	47	3,050,647	16.4%	82	7,355,213	39.5%
South East	38	4,688,809[3]	25.2%	22	1,621,813	8.7%	60	6,310,622	33.9%
South West	22	1,781,618	9.6%	28	2,152,187	11.6%	50	3,933,805	21.1%
TOTAL	117	11,309,560	60.7%	120	7,323,474	39.3%	237	18,633,034	100.0%

Base: attractions providing data for 2017

Table 4.3 overleaf shows how the proportion of **attractions** in each region relates to the proportion of **visits**.

North Wales has the highest proportion of attractions participating in the 2017 survey (at 34.6%), while Mid Wales has the lowest (at 19%). South East Wales accounts for 25.3% of attractions in the sample and South West Wales for 21.1%.

South East Wales accounted for around one in four of the total number of attractions in 2017 but over one in three visits, while the reverse was true of Mid Wales (which accounted for 19% of attractions but fewer than 6% of visits).

Each attraction responding to the survey received an average of 78,620 visits in 2017: the average number of visits per attraction in 2017 was highest in South East Wales (at 105,177), and lowest in Mid Wales (at 22,964).

---

[3] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 the following pages, whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

Table 4.3: Share of attractions and visits by region 2017, plus average visitor numbers 2017 and 2016 (different samples)

Wales region	Base	% of attractions	% of visits	Average no. of visits per attraction 2016	Average no. of visits per attraction 2017
Mid	45	19.0%	5.5%	34,324	**22,964**
North	82	34.6%	39.5%	84,905	**89,698**
South East	60	25.3%	33.9%	107,045	**105,177[4]**
South West	50	21.1%	21.1%	80,455	**78,676**
TOTAL	**237**	**100.0%**	**100.0%**	**80,742**	**78,620**

Base: attractions providing data for 2017 (237) / 2016 (216)

The most visited types of attractions in Wales in 2017 were historic properties and museums and art galleries, accounting for 22.2% and 21.9% of all visits respectively. Wildlife and nature reserves and country parks received 17.3% and 16.7% of visits respectively in the year.

The majority of visits made in 2017 to museums and galleries, wildlife and nature reserves and country parks / gardens were to free rather than paid attractions:

- Almost 3.9 million visits were made to free museums and galleries in Wales in 2017, compared with around 220,000 visits to paid museums and galleries
- 2.6 million visits were made to free wildlife and nature reserves, compared with almost 592,000 paid visits
- 2.5 million visits were made to free country parks / gardens compared with almost 588,000 paid visits

Table 4.4 overleaf provides more details on visit numbers to free and paid attractions, according to attraction type.

---

[4] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 the following pages whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

Table 4.4: Overall visits by admission type and attraction category 2017

Attraction category	Free			Paid			ALL		
	Base	No. of visits 2017	%	Base	No. of visits 2017	%	Base	No. of visits 2017	%
Adventure / activity attraction	2	214,500	1.2%	5	204,402	1.1%	7	418,902	2.2%
Country park / garden	14	2,522,853	13.5%	8	587,789	3.2%	22	3,110,642	16.7%
Farm / rare breeds	2	25,000	0.1%	3	530,000	2.8%	5	555,000	3.0%
Food or drink attraction	2	157,366	0.8%	2	20,465	0.1%	4	177,831	1.0%
Historic property	14	1,338,522	7.2%	51	2,795,193	15.0%	65	4,133,745	22.2%
Industrial / craft attraction	7	207,446	1.1%	4	165,874	0.9%	11	373,320	2.0%
Museum / art gallery	41	3,868,596	20.8%	18	220,198	1.2%	59	4,088,794	21.9%
Railway / tramway / travel / transport / tours	2	22,757	0.1%	12	860,827	4.6%	14	883,584	4.7%
Science / technology centre	1	3,000	0.0%	4	514,447	2.8%	5	517,447	2.8%
Theme park / leisure park	-	-	-	1	796,149	4.3%	1	796,149	4.3%
Wildlife or nature reserve	31	2,626,819	14.1%	10	592,624	3.2%	41	3,219,443	17.3%
Other attraction	1	322,671	1.7%	2	35,506	0.2%	3	358,177	1.9%
TOTAL	**117**	**11,309,560**	**60.7%**	**120**	**7,323,474**	**39.3%**	**237**	**18,633,034**	**100.0%**

Base: attractions providing data for 2017
Note: some changes made to attraction categories in 2016
NB: Caution: Small sample sizes

Table 4.5 overleaf shows the relative proportions of **attractions** responding to the 2017 survey against the relative proportion of **visits**, by attraction category.

Historic properties and industrial / craft attractions account for almost one in three of all attractions responding to the survey (32.0%); however, visits to these types of attractions account for fewer than one in four of all visits (24.2%). Museums and art galleries also account for a slightly higher proportion of attractions in Wales than visits (24.9% of attractions but only 21.9% of visits). In contrast, country parks and gardens (more likely to be free than paid) received a disproportionately high share of visits, accounting for 9.3% of attractions but 16.7% of visits in 2017 - see Table 4.5 overleaf.

Table 4.5: Share of attractions and visits by attraction category 2017, plus average visitor numbers 2017 and 2016 (different samples)

Attraction category	Base	% of attractions	% of visits	Average no. of visits per attraction 2016	Average no. of visits per attraction 2017
Adventure / activity attraction	7	3.0%	2.2%	89,341	59,843
Country park / garden	22	9.3%	16.7%	140,433	141,393
Farm / rare breeds	5	2.1%	3.0%	490,000	111,000
Food or drink attraction	4	1.7%	1.0%	20,779	44,458
Historic property	65	27.4%	22.2%	59,568	63,596
Industrial / craft attraction	11	4.6%	2.0%	34,539	33,938
Museum / art gallery	59	24.9%	21.9%	65,620	69,302
Railway / tramway / travel	14	5.9%	4.7%	48,445	63,113
Science / technology centre	5	2.1%	2.8%	70,779	103,489
Theme park / leisure park	1	0.4%	4.3%	784,522	796,149
Wildlife or nature reserve	41	17.3%	17.3%	103,368	78,523
Other attraction	3	1.3%	1.9%	82,867	119,392
TOTAL	**237**	**100.0%**	**100.0%**	**80,742**	**78,620**

Base: attractions providing data for 2017 (237) / 2016 (216)
Note: some changes made to attraction categories in 2016
NB: Caution: Small sample sizes

Privately owned attractions in Wales accounted for the highest proportion of visits in 2017 (39.7%), with similar numbers of visits made to paid and free attractions in private ownership (3.6 million and 3.7 million respectively).

Properties owned by local authorities received 20.5% of all visits to participating attractions in 2017, with considerably more of these being made to free attractions (16.5%) than paid (4.1%). Natural Resources Wales sites accounted for 12.9% of visits in 2017 while Amgueddfa Cymru - National Museum Wales attractions accounted for 9.4%. All of these visits were free as neither organisation charges for general admission.

The National Trust and Cadw accounted for a similar proportion of visits in 2017 (8.3% and 7.5% respectively), with all of NT and the bulk of Cadw being paid.

Table 4.6: Overall visits by admission type and ownership 2017

Ownership	Free			Paid			ALL		
	Base	No. of visits 2017	%	Base	No. of visits 2017	%	Base	No. of visits 2017	%
Cadw	2	100,574	0.5%	22	1,289,008	6.9%	24	1,389,582	7.5%
Local Authority	32	3,067,418	16.5%	12	760,626	4.1%	44	3,828,044	20.5%
Amgueddfa Cymru - National Museum Wales	7	1,756,130	9.4%	-	-	-	7	1,756,130	9.4%
The National Trust	-	-	-	20	1,542,338	8.3%	20	1,542,338	8.3%
Natural Resources Wales	27	2,395,217	12.9%	-	-	-	27	2,395,217	12.9%
Private owner / trust	47	3,754,137[5]	20.1%	65	3,648,054	19.6%	112	7,402,191	39.7%
RSPB	2	236,084	1.3%	1	83,448	0.4%	3	319,532	1.7%
TOTAL	117	11,309,560	60.7%	120	7,323,474	39.3%	237	18,633,034	100.0%

Base: attractions providing data for 2017
NB: Caution: Small sample sizes

Table 4.7 overleaf illustrates the relative proportions of **attractions** responding to the survey in 2017 against the relative proportion of **visits**, by ownership.

Privately owned attractions account for almost half of the sample in 2017 (47.3%) and almost four in ten visits (39.7%). Local Authority owned attractions account for around one in five attractions (18.6%) and a similar proportion of visits (20.5%).

Cadw owned attractions represent 10.1% of the sample but a slightly lower proportion of visits (7.5%), while Amgueddfa Cymru - National Museum Wales

---

[5] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 taken into account when comparing with other entries.

attractions account for 3.0% of the sample but 9.4% of all visits in 2017 – see Table 4.7 below for more details.

Table 4.7: Share of attractions and visits by ownership 2017, plus average visitor numbers 2017 and 2016 (different samples)

Ownership	Base	% of attractions	% of visits	Average no. of visits per attraction 2016	Average no. of visits per attraction 2017
Cadw	24	10.1%	7.5%	48,751	**57,899**
Local Authority	44	18.6%	20.5%	111,699	**87,001**
Amgueddfa Cymru - National Museum Wales	**7**	3.0%	9.4%	229,565	**250,876**
The National Trust	20	8.4%	8.3%	75,262	**77,117**
Natural Resources Wales	27	11.4%	12.9%	178,345	**88,712**
Private owner / trust	112	47.3%	39.7%	60,676	**66,091[6]**
RSPB	**3**	1.3%	1.7%	68,257	**106,511**
TOTAL	**237**	**100.0%**	**100.0%**	**80,742**	**78,620**

Base: attractions providing data for 2017 (237) / 2016 (216)
NB: Caution: Small sample sizes

Amongst all the attractions responding to the 2017 survey, 23 reported that they received 200,000 or more visits during the year – visits to these 23 attractions accounted for almost half of all visits (48.7%) in the year. Most of these larger attractions (fifteen) do not charge an admission fee and they received almost six in ten of all visits to free attractions (56.1%). The eight paid attractions with the highest visit numbers accounted for a smaller proportion of all paid visits in the year (37.3%) - see Table 4.8 overleaf for more details.

---

[6] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 the following pages whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

Table 4.8: Overall visits by admission type and range of total visits 2017

Range of total visits	Free			Paid			ALL		
	Base	No. of visits 2017	%	Base	No. of visits 2017	%	Base	No. of visits 2017	%
0 – 1,999	14	10,200	0.1%	10	9,713	0.1%	24	19,913	0.1%
2,000 – 4,999	9	27,323	0.1%	14	43,410	0.2%	23	70,733	0.4%
5,000 – 9,999	13	152,993	0.8%	16	113,740	0.6%	29	266,733	1.4%
10,000 – 19,999	12	169,817	0.9%	12	171,395	0.9%	24	341,212	1.8%
20,000 – 49,999	20	684,394	3.7%	27	882,422	4.7%	47	1,566,816	8.4%
50,000 – 99,999	12	878,193	4.7%	19	1,436,599	7.7%	31	2,314,792	12.4%
100,000 – 149,999	16	1,993,418	10.7%	9	1,133,883	6.1%	25	3,127,301	16.8%
150,000 – 199,999	6	1,053,149	5.7%	5	799,261	4.3%	11	1,852,410	9.9%
200,000 and over	15	6,340,073[7]	34.0%	8	2,733,051	14.7%	23	9,073,124	48.7%
TOTAL	**117**	**11,309,560**	**60.7%**	**120**	**7,323,474**	**39.3%**	**237**	**18,663,034**	**100.0%**

Base: attractions providing data for 2017

NB: Caution: Small sample sizes

Almost six in ten participating attractions (59%) reported an increase in visitor numbers in 2017 compared with 2016, when asked whether their total visit numbers had increased, stayed the same or decreased year on year.

Similar proportions of free and paid attractions reported visitor numbers had risen in 2017 (59% and 58% respectively), but a higher proportion of paid attractions than free reported a drop in visits year on year (28% compared with 19%) (see Table 4.9 overleaf).

---

[7] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 the following pages whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

Table 4.9: Increase / decrease in 2017 visit numbers compared with 2016

Visit numbers change 2017 c.f. 2016	Total attractions	Free attractions	Paid attractions
Base	210	90	120
Increased	59%	59%	58%
Stayed same	15%	18%	13%
Decreased	24%	19%	28%
Don't know	2%	4%	1%

Base: attractions providing data (210)

The primary reasons given by attractions reporting an increase in their visitor numbers year on year focused around:

- Better marketing, advertising or branding for the attraction (mentioned by 20 attractions)
- More events and activities or better programming (mentioned by 15)
- More visitors to the area (mentioned by 12)
- Longer opening hours or the ending of industrial action (the latter specifically Amgueddfa Cymru – National Museum Wales) (mentioned by 12 attractions)
- More visitors to the area generally (mentioned by 12)
- Growing awareness of the attraction (mentioned by 8)
- Improvements or developments to the attraction (mentioned by 8)
- Weather that was good for their business (mentioned by 8).

Conversely, those saying their visitor numbers had decreased in 2017 compared with 2016 mainly attributed the decline to:

- Poor weather (mentioned by 16 attractions)
- Economic conditions / Brexit (mentioned by 6)
- Fewer people visiting the area (mentioned by 6)
- Part of the attraction being closed or redeveloped or being open fewer days (mentioned by 6).

5. Comparative analysis of visits to tourist attractions 2017 / 2016

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2017 and 2016 visit figures. Please note that this section only relates to those attractions that provided data **in both years**.

5.1 Overall comparisons

Amongst those attractions responding to the survey in both years (143 in total), visit numbers increased by 7.1% year on year – see Table 5.1 below.

Table 5.1: Comparison of overall yearly visit figures 2017 / 2016

Base	No. of visits 2016	No. of visits 2017	Percentage change
143	14,127,246	15,136,559	+7.1%

Base: attractions providing data for both 2017 and 2016

Analysing the data in more detail, the number of visits to free attractions increased by a greater margin year on year than visits to paid attractions, although both saw an increase (+9.8% in the case of free attractions compared with an increase of +3.6% for paid) - see Table 5.2 below.

Table 5.2: Comparison of overall yearly visit figures 2017 / 2016 by admission type

Admission type	Base	No. of visits 2016	No. of visits 2017	Percentage change
Free	62	8,081,179[8]	8,874,999	+9.8%
Paid	81	6,046,067	6,261,560	+3.6%
TOTAL	**143**	**14,127,246**	**15,136,559**	**+7.1%**

Base: attractions providing data for both 2017 and 2016

Visitor numbers increased in all regions of Wales except the South West, where there was a small decline of 2.3% year on year. North Wales saw the highest increase (at +14.0%) compared with +7.3% in South East Wales and +3.9% in Mid Wales – see Table 5.3 overleaf.

---

[8] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 taken into account when comparing with other entries.

Table 5.3: Comparison of overall yearly visit figures 2017 / 2016 by Wales region

Wales region	Base	No. of visits 2016	No. of visits 2017	Percentage change
Mid	25	651,317	676,962	+3.9%
North	50	4,865,743	5,545,689	+14.0%
South East	37	5,210,179[9]	5,593,081	+7.3%
South West	31	3,400,007	3,320,827	-2.3%
TOTAL	**143**	**14,127,246**	**15,136,559**	**+7.1%**

Base: attractions providing data for both 2017 and 2016

There were sizeable increases in visits to railways / transport attractions in 2017 (up 13.8% from 2016), historic properties (up 13.7%), industrial / craft attractions (up 10.1%) and country parks (up 9.3%). Only a few sectors saw declines and these were generally on very small base sizes of one or two attractions – see Table 5.4 below.

Table 5.4: Comparison of overall yearly visitor figures 2017 / 2016 by attraction category

Attraction category	Base	No. of visits 2016	No. of visits 2017	Percentage change
Adventure / activity	**2**	266,646	156,000	-41.5%
Country park / garden	16	2,583,332	2,822,444	+9.3%
Farm	**1**	490,000	480,000	-2.0%
Food or drink attraction	**1**	18,758	18,965	+1.1%
Historic properties	50	3,357,367	3,817,505	+13.7%
Industrial / craft attraction	**7**	273,808	301,430	+10.1%
Museum / art gallery	33	3,304,508	3,466,643	+4.9%
Railway / tramway / transport	10	609,735	694,045	+13.8%
Science / technology centre	**2**	192,336	191,422	-0.5%
Theme / leisure park	**1**	784,522	796,149	+1.5%
Wildlife or nature reserve	17	1,937,767	2,033,779	+5.0%
Other	**3**	308,467	358,177	+16.1%
TOTAL	143	**14,127,246**	**15,136,559**	**+7.1%**

Base: attractions providing data for both 2017 and 2016
NB: Caution: Small sample sizes

---

[9] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 taken into account when comparing with other entries.

Looking at the data by ownership: visits to private attractions taking part in both years saw the largest increase in 2017 (up 13.7%). Sizeable increases were also evident for Amgueddfa Cymru – National Museum Wales and Cadw-owned attractions (up 9.3% and 8.4% respectively)

Local authority owned attractions, RSPB and National Trust attractions also saw increases. In contrast, Natural Resources Wales sites saw a decrease in visit numbers year on year (of 10.7%) – see Table 5.5. below.

Table 5.5: Comparison of overall yearly visitor figures 2017 / 2016 by ownership

Ownership	Base	No. of visits 2016	No. of visits 2017	Percentage change
Cadw	24	1,282,104	1,389,582	+8.4%
Local Authority	24	2,927,964	3,125,121	+6.7%
Amgueddfa Cymru - National Museum Wales	7	1,606,953	1,756,130	+9.3%
The National Trust	20	1,505,238	1,542,338	+2.5%
Natural Resources Wales	9	1,605,104	1,433,865	-10.7%
Private owner / trust	56	4,898,790[10]	5,569,991	+13.7%
RSPB	3	301,093	319,532	+6.1%
TOTAL	143	**14,127,246**	**15,136,559**	**+7.1%**

Base: attractions providing data for both 2017 and 2016
NB: Caution: Small sample sizes

5.2   Comparison of admission charges for paid attractions

Adult admission charges for paid attractions rose by just over 4% year on year from an average of £8.65 in 2016 to £9.03 in 2017; average child admission charges also rose by a similar margin over the period (4.3%). These price

---

[10] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and 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 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 taken into account when comparing with other entries.

increases are higher than the 2.7% rate of inflation seen by the UK in 2017 – see Table 5.6 below.

Table 5.6: Comparison of adult and child average admission charges (per paid attraction) 2017 / 2016

Average admission charge	2016	2017	Change
Adult	£8.65	£9.03	+4.4%
Child	£5.13	£5.35	+4.3%

Base: all paid attractions providing data for both 2017 and 2016 (81)

Table 5.7 below shows the distribution of admission charges for attractions by charging band in 2017 compared to 2016. Almost four in ten attractions participating in both years (38.3%) charged visitors an average admission fee of £8.00 or more in 2017. At the other end of the scale, 7% of attractions in 2017 charged visitors £3.99 or less – a smaller proportion than 2016.

Table 5.7: Distribution of adult admission charges by range 2017 / 2016

Average admission charge	2016	2017
Less than £1.00	-	1.2%
£1.01 - £1.99	-	1.2%
£2.00 - £2.99	2.6%	1.2%
£3.00 - £3.99	7.7%	3.7%
£4.00 - £4.99	15.4%	17.3%
£5.00 – £5.99	12.8%	11.1%
£6.00 - £6.99	16.7%	14.8%
£7.00 - £7.99	12.8%	11.1%
£8.00 and over	32.1%	38.3%

Base: all paid attractions providing data for both 2017 and 2016 (81)

Average admission charges in 2017 for paid attractions were highest in North Wales (£9.70 adult; £5.69 child) compared with an all-Wales average of £8.12 adult and £4.78 child. They were lowest in South West Wales for adults (at £6.45) and in Mid Wales for children (£3.45) – see Table 5.8 overleaf.

Table 5.8: Average admission charges by Wales region

Attraction category	Base	Average adult admission	Average child admission
Mid	23	£6.85	£3.45
North	47	£9.70	£5.69
South East	22	£8.19	£5.16
South West	28	£6.45	£3.99
TOTAL	**120**	**£8.12**	**£4.78**

Base: all paid attractions providing data for 2017

Looking at admission charges by category, average admission charges for adventure and activity attractions were highest (£18.40 adult; £15.40 child). The lowest average admissions were charged at paid museums and galleries in 2017 (£4.53 adult; £2.25 child) - see Table 5.9 below.

Table 5.9: Average admission charges by attraction category

Attraction category	Base	Average adult admission	Average child admission
Adventure / activity attraction	**5**	£18.40	£15.40
Country park / garden	**8**	£7.89	£2.82
Farm / rare breeds	**3**	£9.67	£8.33
Food or drink attraction	**2**	£9.00	£2.00
Historic property	51	£6.56	£3.84
Industrial / craft attraction	**4**	£8.85	£6.18
Museum / art gallery	18	£4.53	£2.25
Railway / tramway / transport attraction	12	£15.54	£7.33
Science / technology centre	**4**	£10.25	£7.50
Themed attraction / leisure park	**1**	£7.00	£6.00
Wildlife or nature reserve	10	£7.40	£5.05
Other	**2**	£6.00	£4.00
OVERALL AVERAGE	**120**	**£8.12**	**£4.78**

Base: all paid attractions providing data for 2017

NB: Caution: Small sample sizes

In terms of attraction ownership, average admission charges for privately owned attractions were highest (£9.45 adult; £5.48 child), followed by National Trust attractions (£8.01 adult; £4.08 child).

The lowest average admissions were charged at RSPB attractions (although there was just one charging attraction in the sample) (£5.00 adult and £2.50 child) and Cadw attractions (£5.58 adult and £3.62 child) - see Table 5.10 below.

Table 5.10: Average admission charges by ownership

Attraction category	Base	Average adult admission	Average child admission
Cadw	22	£5.58	£3.62
Local Authority	12	£5.96	£4.38
The National Trust	20	£8.01	£4.08
Private owner / trust	65	£9.45	£5.48
RSPB	1	£5.00	£2.50
OVERALL AVERAGE	**120**	**£8.12**	**£4.78**

Base: all paid attractions providing data for 2017
NB: Caution: Small sample sizes

6.   Operations

6.1   Gross revenue movement

This section provides an overview of gross revenue generated from admissions and marketing activities. It should be noted that, as in previous sections of the report, not all respondents answered all questions, and sample sizes therefore change by question.

Nearly half (47.3%) of participating attractions reported an increase in gross revenue in 2017 compared with 2016, a similar level to that seen in 2016. Four in ten (40.1%) reported a similar level of gross revenue in 2017 compared with the previous year (up from 31.7% in 2016), while around one in eight (12.6%) said their revenue had decreased year on year (down from 20.1% in 2016) – see Table 6.1 below.

Table 6.1: Gross revenue movement over time

Gross revenue change	2016 compared with 2015 % attractions	2017 compared with 2016 % attractions
Base	139	182
Down	20.1%	12.6%
Similar	31.7%	40.1%
Up	48.2%	47.3%

Base: all attractions providing data for 2017 / 2016

Overall, average gross revenue increased by 3.1% in 2017, lower than the increase of 6.0% reported in 2016. Six in ten attractions (60.2%) reported no change in revenue year on year.

Table 6.2 overleaf illustrates this in more detail, and shows the gross revenue movement range across the sample.

Table 6.2: Average revenue movement by range 2016 / 2017

Gross revenue movement range	2016 % attractions	2017 % attractions
-50% or more	1.0%	0.8%
-21% to -50%	1.0%	1.6%
-11% to -20%	1.0%	1.6%
-1% to -10%	9.5%	5.7%
0% (no change)	41.9%	60.2%
+1% to +10%	27.6%	16.3%
+11% to +20%	7.6%	7.3%
+21% to +50%	7.6%	4.9%
+50% or more	2.9%	1.6%
AVERAGE TREND	**+6%**	**+3.1%**

Base: all attractions providing data for 2016 (105) / 2017 (123)

As in 2016, country parks and gardens reported the highest increase in gross revenue year on year in 2017 (+11.7%). Wildlife / nature reserves, science / technology centres and food or drink attractions also reported sizeable average increases in gross revenue in 2017 compared with 2016 (at 9.1%, 8.0% and 7.5% respectively).

In contrast railway / transport attractions and historic properties saw small revenue decreases year on year (of -1.9% and -0.5%).

Please note that the sample of attractions contributing data in 2017 and 2016 is different - see Table 6.3 overleaf.

Table 6.3: Average revenue movement by attraction category 2016 / 2017

Attraction category	2016 average revenue movement	2017 average revenue movement
Adventure / activity attraction	+9.1%	+3.3%
Country park / garden	+11.8%	+11.7%
Farm / rare breeds	+8.0%	+6.0%
Food or drink attraction	N/A	+7.5%
Historic property	+5.1%	-0.5%
Industrial / craft attraction	-2.5%	+3.4%
Museum / art gallery	+6.5%	+2.1%
Railway / transport attraction	+9.0%	-1.9%
Science / technology centre	0.0%	+8.0%
Themed attraction / leisure park	0.0%	+4.0%
Wildlife or nature reserve	-0.7%	+9.1%
Other	2.0%	0.0%
TOTAL	**+6.0%**	**+3.1%**

Base: all attractions providing data for 2016 (105) / 2017 (182)

6.2   Employment 2017

Attraction operators were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2017. While all attractions responded to this part of the survey, it should be borne in mind that some attractions gave estimates on worker numbers.

As in 2016, unpaid volunteers accounted for the largest proportion of workers for those attractions participating in the survey (63.0%). Full-time staff accounted for just over one in five workers in 2017 (20.7%) while part-time staff made up a slightly lower proportion (16.3%). Unlike the situation for volunteers, workers were more likely to be permanent than seasonal - see Table 6.4 overleaf.

Table 6.4: Total employees reported in 2017

Employee type		No. of employees	%
Permanent	Full-time	1,576	16.8%
	Part-time	894	9.5%
	Unpaid volunteers	2,041	21.8%
Seasonal	Full-time	364	3.9%
	Part-time	642	6.8%
	Unpaid volunteers	3,859*	41.2%
TOTAL		**9,376**	**100.0%**

Base: all attractions providing data for 2017 (237)

*Note: includes 1,000 unpaid seasonal volunteers reported by one transport / travel attraction

The profile of employees by attraction type varies considerably. The one themed attraction and the small number of food or drink attractions in the 2017 survey sample only employed permanent staff, while museums / art galleries, industrial / craft attractions and science / technology centres largely employed permanent staff (81.7%, 65.0% and 64.9% respectively). For other types of attraction the balance was very much more towards seasonal employees. For example, 80.3% of workers at country parks / gardens in 2017 were seasonal, as were 75% of workers at historic properties and 72.8% of those at railways / tramways / transport attractions. In all these types of attraction the great majority of seasonal workers were unpaid volunteers - see Table 6.5 overleaf.

Table 6.5: Total employees by attraction category reported in 2017

Attraction category	Base		Permanent				Seasonal			
			FT	PT	UV	TOTAL	FT	PT	UV	TOTAL
Adventure / activity attraction	7	No.	77	36	50	163	40	113	2	155
		%	24.2%	11.3%	15.7%	51.3%	12.6%	35.5%	0.67%	48.7%
Country park / garden	22	No.	130	42	13	185	72	69	613	754
		%	13.8%	4.5%	1.4%	19.7%	7.7%	7.3%	65.3%	80.3%
Farm / rare breeds	5	No.	91	11	0	102	54	47	13	114
		%	42.1%	5.1%	0.0%	47.2%	25.0%	21.8%	6.0%	52.8%
Food or drink attraction	4	No.	55	24	0	79	0	0	0	0
		%	69.6%	30.4%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Historic property	65	No.	211	147	123	481	12	180	1,251	1,443
		%	11.0%	7.6%	6.4%	25.0%	0.6%	9.4%	65.0%	75.0%
Industrial / craft attraction	11	No.	32	41	3	76	3	6	32	41
		%	27.4%	35.0%	2.6%	65.0%	2.6%	5.1%	27.4%	35.0%
Museum / art gallery	59	No.	546	318	1,324	2,188	4	56	429	489
		%	20.4%	11.9%	49.5%	81.7%	0.1%	2.1%	16.0%	18.3%
Railway / tramway / transport / tour	14	No.	183	65	294	542	114	52	1,282	1,448
		%	9.2%	3.3%	14.8%	27.2%	5.7%	2.6%	64.4%	72.8%
Science / technology centre	5	No.	40	45	0	85	1	39	6	46
		%	30.5%	34.4%	0.0%	64.9%	0.8%	29.8%	4.6%	35.1%
Themed attraction / leisure park	1	No.	60	68	0	128	0	0	0	0
		%	46.9%	53.1%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Wildlife / nature reserve	38	No.	143	67	233	443	64	76	231	371
		%	17.6%	8.2%	28.6%	54.4%	7.9%	9.3%	28.4%	45.6%
Other	3	No.	8	30	1	39	0	4	0	4
		%	18.6%	69.8%	2.3%	90.7%	0.0%	9.3%	0.0%	9.3%
TOTAL	237		1,576	894	2,041	4,511	364	642	3,859	4,865

Base: all attractions providing data for 2017

FT = full-time; PT = part-time; UV = unpaid volunteer

NB: Caution: Small sample sizes

Table 6.6 below shows how the workforce at attractions in Wales has changed between 2016 and 2017. Please note that these are different samples, and do not reflect exact like-for-like changes amongst the same attractions.

2017 figures show an increase in the workforce at participating attractions, with the total number of workers increasing by 19.3% compared with 2016 figures. There is a particularly large increase in the numbers of unpaid permanent volunteers in 2017 and also sizeable increases in the numbers of full-time staff, both seasonal and permanent – see Table 6.6 below.

Table 6.6: Total employees reported in 2017 and 2016

Employee type		No. of employees 2016	No. of employees 2017	% change
Permanent	Full-time	1,277	1,576	+23.4%
	Part-time	881	894	+1.5%
	Unpaid volunteers	839	2,041	+143.3%
Seasonal	Full-time	246	364	+48.0%
	Part-time	578	642	+11.1%
	Unpaid volunteers	4,038	3,859	-4.4%
TOTAL		**7,859**	**9,376**	**+19.3%**

Base: all attractions providing data for 2016 (216) / 2017 (237)

6.3 Marketing expenditure 2017 / 2016

Three quarters of the attractions participating in the 2017 research who answered this question (75.4%) reported no change in their marketing expenditure in 2017 compared with 2016.

Around the same proportion reported an increase in their marketing spend year on year as reported a decrease, with 13.0% saying it had risen in 2017 and 11.6% saying it had declined - see Table 6.7 overleaf.

Table 6.7: Marketing expenditure levels – 2017 vs. 2016

Admission type	No. of attractions	% attractions
Base	**207**	**100.0%**
Down	24	11.6%
Similar	156	75.4%
Up	27	13.0%

Base: all attractions providing data for 2017 (207)

7.   Visitor profile 2017

For all attraction types except for 'other', which included two indoor activity centres, the majority of visitors to attractions were adults. Overall, adults accounted for just over seven in ten visitors (71.6%) in 2017.

Apart from the 'other' category, science / technology centres, themed attractions (only one in the sample), farm / rare breeds and country parks / gardens accounted for the highest proportion of average child visits (at 39.4%, 35%, 34.4% and 34.2% respectively), higher than the overall average of 27.8% for children. In contrast, food or drink attractions, industrial / craft attractions and museums and galleries were much more likely to receive adult visitors than children - adult visits accounted for an average of 89%, 84.1% and 77.8% respectively of visits to these categories of attraction in 2017 - see Table 7.1 below.

Table 7.1: Proportion of adult and child visits by attraction category 2017

Attraction category	Base	Average % adult visits	Average % child visits
Adventure / activity attraction	7	67.1%	32.9%
Country park / garden	22	65.8%	34.2%
Farm / rare breeds	5	65.6%	34.4%
Food or drink attraction	4	89.0%	11.0%
Historic property	65	68.1%	29.9%
Industrial / craft attraction	11	84.1%	15.9%
Museum / art gallery	59	77.8%	22.2%
Railway / tramway / tour	14	74.6%	25.4%
Science / technology centre	5	60.6%	39.4%
Themed attraction / leisure park	1	65.0%	35.0%
Wildlife / nature reserve	41	60.2%	33.8%
Other	3	41.7%	58.3%
TOTAL	**237**	**71.6%**	**27.8%**

Base: all attractions providing data for 2017 - **NB: Caution: Small sample sizes**

Almost half of visitors to attractions in Wales in 2017 were local visitors (45.3%), with four in ten (40.1%) coming from the rest of the UK and around one in ten (10.7%) from overseas.

Historic properties, country parks / gardens and science / technology centres in Wales received the highest proportion of overseas visitors (at 14.3%, 13.9% and 12.5% respectively, compared with an average of 10.7%), while the one themed attraction / leisure park in the sample received the highest proportion of local visitors (at 75% compared with an average of 45.3%). Railway / tramway / transport attractions were most likely to attract visitors from the rest of the UK (51.5% compared with an average of 40.1%) - see Table 7.2 below.

Table 7.2: Origin of visitors by attraction category 2017

Attraction category	Base	Average % overseas visitors	Average % local visitors	Average % visitors from rest of UK
Adventure / activity attraction	7	4.1%	53.1%	42.7%
Country park / garden	22	13.9%	47.3%	38.8%
Farm / rare breeds	5	4.8%	56.8%	38.4%
Food or drink attraction	4	11.3%	55.0%	33.8%
Historic property	65	14.3%	37.0%	41.6%
Industrial / craft attraction	11	10.1%	36.7%	43.2%
Museum / art gallery	59	10.4%	49.2%	36.5%
Railway / tramway / tour	14	11.2%	29.5%	51.5%
Science / technology centre	5	12.5%	42.5%	45.0%
Themed attraction / leisure park / centre	1	5.0%	75.0%	20.0%
Wildlife or nature reserve	41	6.0%	53.8%	40.2%
Other	3	11.0%	50.7%	38.3%
TOTAL	**237**	**10.7%**	**45.3%**	**40.1%**

Base: attractions providing data in 2017 - **NB: Caution: Small sample sizes**

A new question was introduced to the survey in 2017 to estimate the percentage of visitors to attractions that arrive in organised groups or tours.

Across all attractions participating, groups or tours accounted for an average of 13.1% of visits made in 2017. The proportions of visitors in organised groups / tours was highest for science / technology centres and the 'other' attractions category (at 42% and 36.7% respectively) and lowest for wildlife / nature reserves, farm / rare breed attractions and the themed attraction in the sample (at 3.7%, 6.2% and 7% respectively) - see Table 7.3 below.

Table 7.3: Proportion of visitors in organised groups / tours by category 2017

Attraction category	Base	Average % visiting in groups / tours
Adventure / activity attraction	**7**	15.4%
Country park / garden	22	17.5%
Farm / rare breeds	**5**	6.2%
Food or drink attraction	**4**	9.3%
Historic property	65	9.8%
Industrial / craft attraction	11	10.2%
Museum / art gallery	59	15.1%
Railway / tramway / tour	14	15.1%
Science / technology centre	**5**	42.0%
Themed attraction / leisure park	**1**	7.0%
Wildlife / nature reserve	41	3.7%
Other	**3**	36.7%
TOTAL	**237**	**13.1%**

Base: all attractions providing data for 2017 - **NB: Caution: Small sample sizes**

8.   Alphabetical list of attractions responding to the survey 2017

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
1940s Swansea Bay	SW	PO	MAG	10,345	£7.00
Aberconwy House	N	NT	HP	22,773	£4.40
Aberdulais Tin Works & Waterfall	SW	NT	CP	30,301	£5.50
Abergavenny Museum & Castle	SE	LA	MAG	28,530	-
Aberglasney Gardens	SW	PO	CP	35,000	£8.00
Aberystwyth Cliff Railway	M	PO	R / T	64,000*	£5.00
Aberystwyth University School of Art Gallery & Museum	M	LA	MAG	11,000*	-
Afan Forest Park	SW	NRW	CP	198,638	-
Airworld Aviation Museum	SE	PO	MAG	7,299	£7.00
Amlwch Copper Kingdom	N	PO	IND	5,890*	£6.00
Andrew Logan Museum of Sculpture	M	PO	MAG	1,800*	£3.00
Anglesey Sea Zoo	N	PO	WL	72,901	£8.00
Bangor Cathedral	N	PO	HP	14,860*	-
Beaumaris Castle	N	Cadw	HP	90,807	£6.50
Beaumaris Court House	N	LA	HP	1,000*	£4.00
Beaumaris Gaol	N	LA	HP	6,280*	£5.00
Big Pit National Coal Museum	SE	AC-NMW	MAG	141,969	-
Blaenavon Community Museum	SE	PO	MAG	3,100*	£2.00
Blaenavon Ironworks	SE	Cadw	HP	39,366	-
Blaenavon World Heritage Centre	SE	LA	IND	42,228	-
Bodnant Garden	N	NT	CP	255,949	£14.60
Bodnant Welsh Food Centre	N	PO	F / D	150,000*	-
Bodrhyddan Hall	N	PO	HP	1,500*	£7.00
Breakout Cardiff	SE	PO	A / A	16,000*	£15.00
Brechfa Forest	SW	NRW	WL	10,363	-
Brecon Cathedral	SE	PO	HP	110,000*	-
Brecon Mountain Railway	SE	PO	R / T	80,000*	£14.00
Bwlch Nant yr Arian Visitor Centre	M	NRW	WL	119,202	-
Byd Mary Jones World	N	PO	MAG	3,300*	£4.00

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Cadair Idris Visitor Centre & Cadair Tea Room	N	PO	CP	57,166*	-
Caerleon Roman Fortress and Baths	SE	Cadw	HP	61,208	-
Caernarfon Castle	N	Cadw	HP	204,675	£8.95
Caerphilly Castle	SE	Cadw	HP	143,869	£7.95
Caldey Island	SW	PO	WL	50,000*	£12.00
Caldicot Castle & Country Park	SE	LA	HP	60,000*	-
Canaston	SW	NRW	WL	8,615	-
Cardiff Castle	SE	LA	HP	319,131	£13.00
Cardiff Visitor Centre	SE	LA	Other	322,671	-
Cardigan Bay Marine Wildlife Centre	M	PO	WL	18,635	-
Cardigan Castle	M	PO	HP	30,000*	£5.00
Cardigan Island Coastal Farm Park	M	PO	WL	20,000*	£4.00
Carew Castle & Tidal Mill	SW	LA	HP	48,744	£6.00
Carmarthen Castle	SW	LA	HP	23,534*	-
Carmarthenshire County Museum	SW	LA	MAG	11,641	-
Castell Coch	SE	Cadw	HP	75,710	£6.50
Castell Henllys Iron Age Fort	SW	PO	HP	25,000*	£6.00
Castle & Regimental Museum Monmouth	SE	LA	MAG	4,056	-
Cefn Coed Colliery Museum	SE	LA	MAG	9,000*	-
Ceredigion Museum & Gallery	M	LA	MAG	22,974	-
Ceunant Llenyrch	N	NRW	WL	9,890	-
Chepstow Castle	SE	Cadw	HP	59,781	£6.50
Chirk Castle & Garden	N	NT	HP	162,351	£14.00
Cilgerran Castle	M	Cadw	HP	17,385	£4.00
City Sightseeing Tours Cardiff	SE	PO	R / T	78,320	£13.00
Cloverlands Model Car Museum	M	PO	MAG	950*	£3.00
Coed Rhayader	M	NRW	WL	3,951	-
Coed y Brenin Forest Park	N	NRW	WL	147,489	-
Coed y Cerrig National Nature Reserve	SE	NRW	WL	10,792	-
Coedydd Aber National Nature Reserve	M	NRW	WL	42,759	-
Colby Woodland Garden	SW	NT	CP	47,102	£7.00

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Conwy Castle	N	Cadw	HP	221,652	£8.95
Conwy Nature Reserve	N	RSPB	WL	83,448	£5.00
Conwy Suspension Bridge	N	NT	HP	21,350	£1.60
Cors Caron National Nature Reserve	M	NRW	WL	43,332	-
Cosmeston Lakes Country Park	SE	LA	CP	250,000*	-
Cosmeston Medieval Village	SE	LA	HP	41,645*	£5.00
Court Cupboard Gallery	SE	PO	MAG	3,360	-
Craft in the Bay	SE	LA	MAG	109,326	-
Craft Renaissance Gallery	SE	PO	IND	6,000*	-
Criccieth Castle	N	Cadw	HP	42,863	£5.00
Cwm Byddog Nature Reserve	M	PO	WL	750*	-
Cwm Weeg Gardens	M	PO	CP	601	£5.00
Cwmcarn Forest	SE	NRW	CP	191,426	-
Cwmduad	SW	NRW	WL	3,152	-
Cynon Valley Museum	SE	PO	MAG	8,015	-
DangerPoint	N	PO	Other	7,506	£5.00
Dare Valley Country Park	SE	LA	CP	200*	-
Denbigh Castle	N	Cadw	HP	10,156	£4.00
Denmark Farm Conservation Centre	M	PO	Farm	1,000*	-
Devil's Bridge Waterfalls	M	PO	WL	48,000*	£4.00
Dinas Rock	M	NRW	WL	49,253	-
Dolaucothi Gold Mines	SW	NT	IND	26,134	£9.40
Dyfed Shire Horse Farm	SW	PO	Farm	10,000*	£7.00
Dyffryn Gardens	SE	NT	CP	128,842	£10.00
Dyfi Forest	M	NRW	WL	42,397	-
Dylan Thomas Centre	SW	LA	MAG	157,685	-
Ebbw Vale Works Museum	SE	PO	IND	814*	-
Electric Mountain Visitor Centre	N	PO	SC / T	250,000*	£9.00
Ellins Tower Visitor Centre	N	LA	WL	284,907*	-
Erddig	N	NT	HP	163,758	£8.80
Firing Line: Cardiff Castle Museum of the Welsh Soldier	SE	PO	MAG	115,339	£13.00
Foel Farm Park	N	PO	Farm	40,000*	£8.00
Folly Farm	SW	PO	Farm	480,000*	£14.00
Garwnant Visitor Centre	SE	NRW	CP	99,110	-
Gate St Clears	SW	PO	MAG	40,015	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Glynn Vivian Art Gallery	SW	LA	MAG	42,682	-
Go Below Underground Adventures	N	PO	A / A	23,000*	£66.00
Great Orme Family Golf	N	PO	A / A	2,500*	£5.00
Great Orme Tramway	N	LA	R / T	205,495	£7.50
Gregynog Hall	SE	PO	HP	850*	£4.00
Gwydir Forest Park	N	NRW	WL	317,405	-
Hall at Abbey-Cwm-Hir	M	PO	HP	8,000*	£16.00
Harlech Castle	N	Cadw	HP	116,216	£6.50
Holyhead Maritime Museum	N	PO	MAG	4,149	£5.00
Horse Drawn Boats Llangollen	N	PO	R / T	68,000*	£12.00
Howell Harris Museum	M	PO	MAG	350*	-
Inigo Jones Slate Works	N	PO	IND	40,000*	£6.00
Internal Fire - Museum of Power	M	PO	MAG	6,723	£7.00
Judge's Lodging	M	PO	HP	8,364	£8.00
Kidwelly Castle	SW	Cadw	HP	39,344	£4.00
Kidwelly Industrial Museum	SW	PO	MAG	721	-
Kymin (The)	SE	NT	HP	5,938	£3.00
Lampeter Museum	M	PO	MAG	926*	-
Last Invasion Tapestry, Fishguard	SW	PO	MAG	20,000*	-
Laugharne Castle	SW	Cadw	HP	13,779	£4.00
LC Waterpark & Leisure Complex	SW	PO	Theme	796,149	£7.00
Llandegfedd Reservoir Visitor Centre	SE	PO	WL	175,400*	-
Llanerchaeron	M	NT	HP	48,873	£8.20
Llangollen Motor Museum	N	PO	MAG	5,000*	£5.00
Llangollen Railway	N	PO	R / T	100,000*	£16.00
Llanymynech Wharf Visitor Centre	M	PO	MAG	400*	-
Llanyrafon Mill	SE	LA	IND	404	-
Llyn Alwen / Brenig	N	NRW	WL	50,305	-
Llyn Mair	N	NRW	WL	13,332	-
Llyn Padarn & Padarn Country Park	N	LA	CP	136,550*	-
Llynnon Mill	N	LA	HP	4,000*	£4.00
Loggerheads Country Park	N	LA	CP	250,000*	-
Maesfron Hall and Gardens	M	PO	CP	2,000*	£5.00
Manor Wildlife Park	SW	PO	WL	78,562	£14.00

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Merthyr Mawr Warren National Nature Reserve	SE	NRW	WL	86,002	-
Minera Lead Mines	N	LA	CP	397	-
Mission Gallery	SW	PO	MAG	31,000*	-
Moel Famau Forest	N	NRW	WL	84,937	-
Monty's Brewery Visitor Centre	M	PO	F / D	7,366*	-
Morfa Dyffryn	N	NRW	WL	60,215	-
Morfa Harlech National Nature Reserve	N	NRW	WL	86,172	-
Museum of Speed	SW	PO	MAG	15,956	£2.00
Nantclywd Y Dre	N	LA	HP	2,266*	£5.00
Narrow Gauge Railway Museum	N	PO	R / T	16,757	-
National Assembly for Wales	SE	LA	HP	108,921*	-
National Beekeepers Wales	N	PO	Farm	24,000*	-
National Coracle and Flour Mill	SW	PO	MAG	2,779	£3.50
National Museum Cardiff	SE	AC-NMW	MAG	539,550	-
National Roman Legion Museum	SE	AC-NMW	MAG	70,021	-
National Slate Museum	N	AC-NMW	MAG	145,969	-
National Waterfront Museum	SW	AC-NMW	MAG	268,622	-
National Wool Museum	M	AC-NMW	MAG	36,909	-
Newborough National Nature Reserve & Forest	N	NRW	WL	449,771	-
Newport Cathedral (St Woolos)	SE	PO	HP	2,754*	-
Newport Medieval Ship	SE	PO	MAG	2,200	-
Newport Wetlands Nature Reserve	SE	RSPB	WL	114,887	-
Newton House, Dinefwr Park & Castle	SW	NT	CP	87,994	£8.00
Newtown Textile Museum	M	PO	MAG	1,061	-
North Wales Bowls Centre	N	PO	A / A	34,500*	-
Norwegian Church	SE	LA	MAG	30,000*	-
Ocean Lab	SW	LA	WL	3,970	£3.00
Old Bell Museum	M	PO	MAG	2,019	£1.00
Old Station	SE	LA	CP	115,000*	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Oriel Mostyn Gallery	N	PO	MAG	80,000*	-
Oriel Myrddin Gallery	SW	PO	MAG	19,609*	-
Oriel Plas Glyn-y-Weddw Arts Centre	N	PO	MAG	126,567	-
Oriel y Parc	SW	LA	IND	136,000*	-
Oxwich Castle	SW	Cadw	HP	6,233	£4.00
Oxwich National Nature Reserve	SW	NRW	WL	12,060	-
Oystermouth Castle	SW	LA	HP	25,000*	£4.00
Parc Howard Museum & Art Gallery	SW	LA	MAG	12,281	-
Pembrey Country Park	SW	LA	CP	470,000	-
Pembroke Dock Heritage Centre	SW	PO	MAG	8,081	£5.00
Pembrokeshire Candle Centre	SW	PO	IND	2,000*	-
Penmaenmawr Museum	N	PO	MAG	966	-
Penrhyn Castle	N	NT	HP	110,820	£13.30
Picton Castle & Gardens	SW	PO	HP	32,968	£10.00
Plas Mawr	N	Cadw	HP	26,904	£6.50
Plas Newydd	N	NT	HP	143,206	£12.10
Plas yn Rhiw	N	NT	HP	8,637	£5.20
Playbarn at Brynich	SE	PO	A / A	29,902*	-
Pontcysyllte Aqueduct	N	PO	HP	333,363	-
Pontypridd Museum	SE	LA	MAG	8,882*	-
Porth y Swnt	N	NT	WL	14,591	£2.00
Porthcawl Museum	SW	LA	MAG	9,245*	£1.00
Powis Castle & Garden	M	NT	HP	145,325	£13.75
Quackers Play Centre	M	PO	Other	28,000*	£7.00
Quarry Hospital Visitor Centre	N	LA	MAG	18,487*	-
Raglan Castle	SE	Cadw	HP	67,046	£6.50
Regimental Museum of The Royal Welsh (Brecon)	M	PO	MAG	8,599	£5.00
Rhayader Tunnel	M	PO	WL	5,000*	-
Rheidol Visitor Centre & Power Station	M	PO	SC / T	3,000*	-
Rheilffordd Corris Railway	N	PO	R / T	4,782	£6.00
Rhiw Valley Light Railway	M	PO	R / T	500*	£6.00
Rhuddlan Castle	N	Cadw	HP	22,532	£4.00
RibRide	N	PO	R / T	15,000*	£24.00
Royal Mint Experience	SE	LA	IND	93,850	£14.00

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Royal Welch Fusiliers Regimental Museum	N	PO	MAG	112,129	-
Rug Chapel	N	Cadw	HP	2,108	£4.00
Ruperra Castle	SE	LA	HP	277,123	-
Ruthin Craft Centre	N	LA	MAG	68,272	-
Sidney Nolan Trust	M	PO	MAG	1,911	-
Snowdon Mountain Railway	N	PO	R / T	130,266	£29.00
Snowdon Summit Visitor Centre	N	PO	CP	654,077	-
Solva Woollen Mill	SW	PO	IND	20,000*	-
South Stack Cliffs Nature Reserve	N	RSPB	WL	121,197	-
South Wales Miners' Museum	SE	PO	MAG	1,000*	£3.00
Spaceguard Centre	M	PO	SC / T	2,422	£17.00
St David's Bishop Palace	SW	Cadw	HP	26,802	£4.00
St Davids Cathedral	SW	PO	HP	287,000	-
St Fagans National Museum of History	SE	AC-NMW	MAG	553,090	-
Stackpole Walled Gardens & Visitor Centre	N	PO	CP	25,289*	-
Strata Florida Abbey	M	Cadw	HP	5,550	£4.00
Surf Snowdonia	N	PO	A / A	180,000*	-
Swansea Community Boat Trust	SW	PO	R / T	6,000*	-
Talacre	N	NRW	WL	128,671	-
Techniquest	SE	PO	SC / T	189,000*	£8.00
Techniquest Glyndwr	N	PO	SC / T	73,025	£7.00
Tenby Museum & Art Gallery	SW	PO	MAG	14,514	£5.00
Tintern Abbey	SE	Cadw	HP	74,497	£6.50
Tredegar House	SE	NT	HP	89,194	£10.20
Tretower Court & Castle	M	Cadw	HP	14,704	£6.50
Tudor Merchant's House	SW	NT	HP	25,185	£5.20
Tŷ Halen, Saltcote & Visitor Centre	N	PO	F / D	18,965	£6.00
Tŷ Mawr Country Park Visitor Centre	N	PO	CP	75,000*	-
Tŷ Mawr Medieval Hall	M	PO	HP	12	£6.00
Tŷ Mawr Wybrnant	N	NT	HP	4,015	£4.00
Usk Castle	SE	PO	HP	8,532*	-
Valle Crucis Abbey	N	Cadw	HP	6,395	£4.00
Van Road	SE	NRW	WL	6,437	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2017 VISITS	£ ADULT ADMISSION
Wales Millennium Centre	SE	PO	MAG	1,082,494	-
Welsh Highland Railway	N	PO	R / T	79,464*	£40.00
Welsh Mountain Zoo	N	PO	WL	151,152	£13.00
Welshpool & Llanfair Light Railway	M	PO	R / T	35,000*	£14.00
White Castle Vineyard	SE	PO	F / D	1,500*	£12.00
Winding House Museum	SE	LA	HP	9,041	-
Wireless in Wales Radio Museum	N	PO	MAG	300*	-
Workhouse History Centre Llanfyllin	M	PO	HP	2,850*	-
Wrexham County Borough Museum & Archives	N	LA	MAG	45,626	-
WWT Llanelli Wetland Centre	SW	PO	WL	70,000*	£9.00
Xcel Bowl	SW	PO	A / A	133,000*	£6.00
Ynys Las	M	NRW	WL	119,541	-

APPENDICES

APPENDIX I

Questionnaire

VISITS TO WELSH TOURIST ATTRACTIONS 2017

VISITORS

1 **What were the visitor numbers to your attraction during the 2017 calendar year?** *Please exclude special events outside normal opening hours or any private hire.*

i. Total visits numbers in 2017 (**paid** and **free combined**) Is this number: exact? ☐ An estimate? ☐

ii. Visits numbers in 2017 for **paid visits only** Is this number: exact? ☐ An estimate? ☐

2a **Compared to 2016, did your total visit numbers increase, stay the same or decrease?**
PLEASE TICK THE APPROPRIATE BOX

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

2b **If your visitor numbers have increased or decreased, what factors do you think have caused this?**
PLEASE WRITE IN

_____
_____
_____
Don't know   ☐

3 **What method/s do you use for recording / estimating visitor numbers?** *Please tick all that apply.*

From ticket sales and/or group booking sales ☐   Estimate only on the basis of sample count ☐

Mechanical or electronic method of counting (e.g. turnstile) ☐   Estimate only ☐

Manual method of counting numbers ☐   Other (please specify) _____ ☐

4a **What percentage of visitors in 2017 (paid and free) were:**

Adults ☐☐☐ %

=100% Are these percentages: exact? ☐   An estimate? ☐

Children ☐☐☐ %

4b **What percentage of your total visitors, in 2017, were visiting in organised groups or tours?**
☐☐☐ %   Exact? ☐   Estimate? ☐

5 **Did you charge for admission to the main attraction in 2017?**   Yes ☐   No ☐

6 **(IF YES) What was the standard admission charge (in high season/ summer) per person for the main attraction in 2017 (including VAT)?**

Adult £ ☐☐·☐☐ p   Child £ ☐☐·☐☐ p   Car parking fee £ ☐☐·☐☐ p

7 **What percentage of visitors in 2017 were from:**

Overseas ☐☐☐ %

Wales ☐☐☐ %   =100%

Rest of UK (excl. Wales) ☐☐☐ %

OPERATIONS

8   **How did the attraction's <u>gross revenue</u> in 2017 compare with 2016?**

Up ☐   → If known, what was the percentage <u>increase</u>?   ☐☐☐ %

Similar ☐

Down ☐   → If known, what was the percentage <u>decrease</u>?   ☐☐☐ %

HUMAN RESOURCES

9   **How many people were employed in any visitor-related activities in the attraction in 2017, including yourself, working owners, self-employed and/or any volunteers?**

Permanent full-time ☐☐   Seasonal full-time ☐☐   Volunteers full-time ☐☐

Permanent part-time ☐☐   Seasonal part-time ☐☐   Volunteers seasonal ☐☐

MARKETING

10   **Compared with 2016, was expenditure on marketing activities in 2017:**   Up ☐ Down ☐ Similar ☐

Thank you.

APPENDIX II

Visit Numbers 2014 - 2017

Name	2014	2015	2016	2017
1940s Swansea Bay	9,789	9,880	10,286	**10,345**
Aberconwy House	20,208	21,850	22,039	**22,773**
Aberdulais Tin Works & Waterfall	24,824	26,855	26,129	**30,301**
Abergavenny Museum & Castle	-	-	-	**28,530**
Aberglasney Gardens	-	-	-	**35,000**
Aberystwyth Cliff Railway	-	-	64,038	**64,000**
Aberystwyth University School of Art Gallery & Museum	-	-	11,000	**11,000**
Afan Forest Park	213,011	208,473	218,319	**198,638**
Airworld Aviation Museum	-	-	7,059	**7,299**
Amlwch Copper Kingdom	5,496	7,897	-	**5,890**
Andrew Logan Museum of Sculpture	-	-	-	**1,800**
Anglesey Sea Zoo	63,709	75,183	73,251	**72,901**
Bangor Cathedral	-	-	-	**14,860**
Beaumaris Castle	86,854	82,368	82,335	**90,807**
Beaumaris Court House	-	-	-	**1,000**
Beaumaris Gaol	-	-	-	**6,280**
Big Pit National Coal Museum	149,087	147,085	109,008	**141,969**
Blaenavon Community Museum	-	-	-	**3,100**
Blaenavon Ironworks	22,467	29,107	29,468	**39,366**
Blaenavon World Heritage Centre	-	-	43,605	**42,228**
Bodnant Garden	193,415	226,998	242,898	**255,949**
Bodnant Welsh Food Centre	-	-	-	**150,000**
Bodrhyddan Hall	2,009	1,878	1,237	**1,500**
Breakout Cardiff	-	-	-	**16,000**
Brechfa Forest	11,618	14,847	-	**10,363**
Brecon Cathedral	-	-	-	**110,000**
Brecon Mountain Railway	-	-	76,371	**80,000**
Bwlch Nant yr Arian Visitor Centre	94,898	106,426	124,659	**119,202**
Byd Mary Jones World	817	6,466	-	**3,300**
Cadair Idris Visitor Centre & Cadair Tea Room	-	-	20,136	**57,166**
Caerleon Roman Fortress and Baths	55,977	60,192	61,119	**61,208**
Caernarfon Castle	175,216	195,352	195,151	**204,675**
Caerphilly Castle	107,887	93,421	101,624	**143,869**
Caldey Island	-	-	-	**50,000**
Caldicot Castle & Country Park	-	-	-	**60,000**
Canaston	-	-	-	**8,615**
Cardiff Castle	-	-	301,349	**319,131**

Name	2014	2015	2016	2017
Cardiff Visitor Centre	-	-	277,712	322,671
Cardigan Bay Marine Wildlife Centre	-	-	16,831	18,635
Cardigan Castle	-	-	-	30,000
Cardigan Island Coastal Farm Park	-	-	-	20,000
Carew Castle & Tidal Mill	-	-	45,432	48,744
Carmarthen Castle	-	-	24,522	23,534
Carmarthenshire County Museum	-	-	-	11,641
Castell Coch	69,418	69,004	69,789	75,710
Castell Henllys Iron Age Fort	-	-	-	25,000
Castle & Regimental Museum Monmouth	4,473	4,432	-	4,056
Cefn Coed Colliery Museum	-	-	-	9,000
Ceredigion Museum & Gallery	-	-	-	22,974
Ceunant Llenyrch	-	-	-	9,890
Chepstow Castle	56,976	59,463	59,868	59,781
Chirk Castle & Garden	126,223	143,327	150,414	162,351
Cilgerran Castle	17,894	19,416	20,347	17,385
City Sightseeing Tours Cardiff	-	-	10,000	78,320
Cloverlands Model Car Museum	-	-	-	950
Coed Rhayader	-	-	-	3,951
Coed y Brenin Forest Park	131,171	143,233	162,021	147,489
Coed y Cerrig National Nature Reserve	-	-	-	10,792
Coedydd Aber National Nature Reserve	-	-	-	42,759
Colby Woodland Garden	39,298	43,089	47,138	47,102
Conwy Castle	184,758	204,172	208,887	221,652
Conwy Nature Reserve	74,672	74,217	76,501	83,448
Conwy Suspension Bridge	-	-	21,350	21,350
Cors Caron National Nature Reserve	-	-	-	43,332
Cosmeston Lakes Country Park	-	-	-	250,000
Cosmeston Medieval Village	-	-	-	41,645
Court Cupboard Gallery	-	-	3,269	3,360
Craft in the Bay	100,712	101,180	83,177	109,326
Craft Renaissance Gallery	-	-	-	6,000
Criccieth Castle	43,528	45,715	47,935	42,863
Cwm Byddog Nature Reserve	-	-	-	750
Cwm Weeg Gardens	-	-	-	601
Cwmcarn Forest	225,904	193,802	224,932	191,426
Cwmduad	-	-	-	3,152
Cynon Valley Museum	-	-	2,324	8,015
DangerPoint	1,063	781	755	7,506
Dare Valley Country Park	-	-	-	200
Denbigh Castle	12,584	10,154	10,555	10,156
Denmark Farm Conservation Centre	-	-	-	1,000

Name	2014	2015	2016	2017
Devil's Bridge Waterfalls	-	-	46,124	48,000
Dinas Rock	40,762	39,077	32,094	49,253
Dolaucothi Gold Mines	18,154	22,420	22,296	26,134
Dyfed Shire Horse Farm	-	-	-	10,000
Dyffryn Gardens	71,569	90,668	111,522	128,842
Dyfi Forest	-	-	-	42,397
Dylan Thomas Centre	-	-	-	157,685
Ebbw Vale Works Museum	818	924	755	814
Electric Mountain Visitor Centre	125,000	132,000	-	250,000
Ellins Tower Seabird Centre	-	-	270,569	284,907
Erddig	130,349	143,075	162,911	163,758
Firing Line: Cardiff Castle Museum of the Welsh Soldier	58,553	74,170	87,696	115,339
Foel Farm Park	-	-	-	40,000
Folly Farm	490,000	500,000	490,000	480,000
Garwnant Visitor Centre	85,452	85,725	109,135	99,110
Gate St Clears	41,813	38,961	-	40,015
Glynn Vivian Art Gallery	59,014	29,178	-	42,682
Go Below Underground Adventures	-	-	36,646	23,000
Great Orme Family Golf	-	-	-	2,500
Great Orme Tramway	178,406	196,920	208,850	205,495
Gregynog Hall	-	-	-	850
Gwydir Forest Park	-	235,816	-	317,405
Hall at Abbey-Cwm-Hir	-	-	5,500	8,000
Harlech Castle	75,512	89,038	98,877	116,216
Holyhead Maritime Museum	-	-	-	4,149
Horse Drawn Boats Llangollen	-	-	-	68,000
Howell Harris Museum	-	-	2,100	350
Inigo Jones Slate Works	-	-	-	40,000
Internal Fire - Museum of Power	-	-	6,500	6,723
Judge's Lodging	11,022	11,959	9,487	8,364
Kidwelly Castle	29,359	31,686	31,852	39,344
Kidwelly Industrial Museum	-	-	-	721
Kymin (The)	-	-	5,908	5,938
Lampeter Museum	-	-	1,086	926
Last Invasion Tapestry, Fishguard	-	-	16,726	20,000
Laugharne Castle	15,807	12,209	12,859	13,779
LC Waterpark & Leisure Complex	772,476	803,498	784,522	796,149
Llandegfedd Reservoir Visitor Centre	-	-	1,040	175,400
Llanerchaeron	38,010	43,054	45,795	48,873
Llangollen Motor Museum	-	-	-	5,000
Llangollen Railway	-	-	-	100,000
Llanymynech Wharf Visitor Centre	-	-	-	400

Name	2014	2015	2016	2017
Llanyrafon Mill	-	-	293	**404**
Llyn Alwen / Brenig	29,569	33,936	124,744	**50,305**
Llyn Mair	-	-	-	**13,332**
Llyn Padarn & Padarn Country Park	-	-	108,557	**136,550**
Llynnon Mill	-	-	-	**4,000**
Loggerheads Country Park	-	-	224,040	**250,000**
Maesfron Hall and Gardens	-	-	-	**2,000**
Manor Wildlife Park	-	-	-	**78,562**
Merthyr Mawr Warren National Nature Reserve	-	-	-	**86,002**
Minera Lead Mines	-	-	-	**397**
Mission Gallery	-	-	11,953	**31,000**
Moel Famau Forest	74,554	71,931	-	**84,937**
Monty's Brewery Visitor Centre	-	-	-	**7,366**
Morfa Dyffryn	-	-	-	**60,215**
Morfa Harlech National Nature Reserve	-	-	-	**86,172**
Museum of Speed	-	-	-	**15,956**
Nantclywd Y Dre	-	-	-	**2,266**
Narrow Gauge Railway Museum	15,767	17,884	-	**16,757**
National Assembly for Wales	82,005	74,845	84,208	**108,921**
National Beekeepers Wales	-	-	-	**24,000**
National Coracle Centre & Flour Mill	-	-	3,209	**2,779**
National Museum Cardiff	444,986	472,544	509,981	**539,550**
National Roman Legion Museum	69,965	70,695	69,926	**70,021**
National Slate Museum	154,608	140,828	122,007	**145,969**
National Waterfront Museum	264,949	257,617	265,235	**268,622**
National Wool Museum	34,817	33,653	26,394	**36,909**
Newborough National Nature Reserve & Forest	301,924	319,320	492,259	**449,771**
Newport Cathedral (St Woolos)	-	-	-	**2,754**
Newport Medieval Ship	-	-	-	**2,200**
Newport Wetlands Nature Reserve	99,219	104,067	109,323	**114,887**
Newton House, Dinefwr Park & Castle	-	-	76,258	**87,994**
Newtown Textile Museum	839	74	405	**1,061**
North Wales Bowls Centre	-	-	-	**34,500**
Norwegian Church	-	-	-	**30,000**
Ocean Lab	-	-	1,646	**3,970**
Old Bell Museum	2,672	2,237	1,949	**2,019**
Old Station	122,722	130,254	140,600	**115,000**
Oriel Mostyn Gallery	74,704	79,064	-	**80,000**
Oriel Myrddin Gallery	22,839	19,910	19,833	**19,609**
Oriel Plas Glyn-y-Weddw Arts Centre	-	-	-	**126,567**
Oriel y Parc	136,797	135,152	142,000	**136,000**
Oxwich Castle	6,070	6,336	6,587	**6,233**

Name	2014	2015	2016	2017
Oxwich National Nature Reserve	-	-	-	12,060
Oystermouth Castle	21,000	24,500	22,000	25,000
Parc Howard Museum & Art Gallery	-	-	-	12,281
Pembrey Country Park	440,000	343,811	491,641	470,000
Pembroke Dock Heritage Centre	-	-	7,350	8,081
Pembrokeshire Candle Centre	-	-	12,000	2,000
Penmaenmawr Museum	-	-	389	966
Penrhyn Castle	93,587	111,948	115,561	110,820
Picton Castle & Gardens	-	-	31,450	32,968
Plas Mawr	24,738	23,658	24,542	26,904
Plas Newydd	113,061	128,536	146,528	143,206
Plas yn Rhiw	16,252	17,296	17,285	8,637
Playbarn at Brynich	-	-	-	29,902
Pontcysyllte Aqueduct	-	-	45,221	333,363
Pontypridd Museum	22,427	21,873	8,948	8,882
Porth y Swnt	15,136	13,767	12,893	14,591
Porthcawl Museum	4,338	5,217	-	9,245
Powis Castle & Garden	126,007	156,921	154,828	145,325
Quackers Play Centre	-	-	30,000	28,000
Quarry Hospital Visitor Centre	-	-	17,547	18,487
Raglan Castle	59,385	66,058	67,497	67,046
Regimental Museum of The Royal Welsh (Brecon)	10,441	11,943	10,684	8,599
Rhayader Tunnel	-	-	-	5,000
Rheidol Visitor Centre & Power Station	-	-	-	3,000
Rheilffordd Corris Railway	-	-	-	4,782
Rhiw Valley Light Railway	-	-	562	500
Rhuddlan Castle	20,701	25,872	26,906	22,532
RibRide	-	-	9,514	15,000
Royal Mint Experience	-	-	52,859	93,850
Royal Welch Fusiliers Regimental Museum	-	-	-	112,129
Rug Chapel	3,387	2,674	2,744	2,108
Ruperra Castle	-	-	265,503	277,123
Ruthin Craft Centre	-	-	65,484	68,272
Sidney Nolan Trust	-	-	1,628	1,911
Snowdon Mountain Railway	131,144	132,252	117,077	130,266
Snowdon Summit Visitor Centre	445,890	449,657	465,000	654,077
Solva Woollen Mill	-	-	-	20,000
South Stack Cliffs Nature Reserve	113,849	113,950	115,269	121,197
South Wales Miners' Museum	-	-	-	1,000
Spaceguard Centre	-	-	2,336	2,422
St David's Bishop Palace	24,646	24,308	24,947	26,802
St David's Cathedral	257,000	275,700	271,700	287,000

Name	2014	2015	2016	2017
St Fagans National Museum of History	566,209	531,231	504,402	553,090
Stackpole Walled Gardens & Visitor Centre	-	-	25,494	25,289
Strata Florida Abbey	6,391	5,280	5,380	5,550
Surf Snowdonia	-	-	-	180,000
Swansea Community Boat Trust	-	-	12,000	6,000
Talacre	-	102,563	116,941	128,671
Techniquest	-	-	190,000	189,000
Techniquest Glyndwr	-	-	-	73,025
Tenby Museum & Art Gallery	16,957	17,082	16,073	14,514
Tintern Abbey	67,520	70,808	71,360	74,497
Tredegar House	77,661	90,584	94,091	89,194
Tretower Court & Castle	11,537	13,587	13,849	14,704
Tudor Merchant's House	22,131	24,658	24,044	25,185
Tŷ Halen, Saltcote & Visitor Centre	-	-	18,758	18,965
Tŷ Mawr Country Park Visitor Centre	-	-	51,533	75,000
Tŷ Mawr Medieval Hall	-	-	-	12
Tŷ Mawr Wybrnant	6,158	5,577	5,350	4,015
Usk Castle	-	-	-	8,532
Valle Crucis Abbey	8,117	7,355	7,626	6,395
Van Road Trails	-	-	-	6,437
Wales Millennium Centre	1,197,566	1,010,400	1,264,458	1,082,494
Welsh Highland Railway	-	-	84,448	79,464
Welsh Mountain Zoo	153,612	162,116	161,602	151,152
Welshpool & Llanfair Light Railway	-	-	26,875	35,000
White Castle Vineyard	8,603	7,682	-	1,500
Winding House Museum	-	-	-	9,041
Wireless in Wales Radio Museum	-	-	-	300
Workhouse History Centre Llanfyllin	-	-	1,550	2,850
Wrexham County Borough Museum & Archives	35,068	32,104	36,422	45,626
WWT Llanelli Wetland Centre	-	-	-	70,000
Xcel Bowl	-	-	230,000	133,000
Ynys Las	-	-	-	119,541
Zip World – Bounce Below, Caverns & Titan[11]	-	-	-	190,000
Zip World - Fforest[12]	-	-	-	115,528
Zip World - Velocity[13]	-	-	-	89,155

---

[11] Figures for 2017 supplied too late for inclusion in calculations in main body of report
[12] As above
[13] As above