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Visits to Tourist Attractions in Wales 2018 Report for Visit Wales

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This document is also available in Welsh.

Visits to Tourist Attractions in Wales – 2018

Research on behalf of Visit Wales

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The logo for Beaufort Research, featuring the text "beaufortresearch" in a white, lowercase, sans-serif font, centered within a solid purple rectangular background.

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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 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. Please note it can be difficult to differentiate between different types of visitors at certain attractions.

If visit figures were estimated by operators, this is indicated with an asterisk (*) following the number of visits in 2018 in section 8 towards the end of the report.

Admission

If an attraction has an admission charge, the adult admission charge for high season 2018 is given. If the attraction said they charge for admission but did not provide the admission charge it is marked with NP (= not provided) in section 8.

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

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.)
	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
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 and shown in italics to denote the need for caution to be applied when interpreting the results.

Executive summary

i. Universe and sample size

- A total of 485 individual attractions believed to fit the tourist attraction definition were invited to take part in the 2018 survey. Alongside this, data was supplied separately for 85 attractions by organisations accounting for large numbers of attractions in Wales (Amgueddfa Cymru – National Museum Wales, Cadw, Dŵr Cymru Welsh Water, National Trust, Natural Resources Wales and RSPB Cymru). The total universe for 2018 was therefore 570.
- 268 attractions responded to the survey in 2018, with 248 able to provide visit numbers. This represents a 47% response rate overall (the highest since 2007).

ii. Visits 2018

- 22.2 million visits were made to attractions in Wales taking part in the 2018 survey: 61% of the 2018 visits were made to attractions with free admission and 39% to attractions where an admission charge applies.
- Amongst all attractions responding to the survey, the 23 reporting 200,000 or more visitors accounted for almost half of all visits recorded in 2018.
- North Wales and South East Wales both accounted for a higher proportion of visits in 2018 than their proportion of attractions. The reverse was true of Mid Wales and to a lesser extent, South West Wales. This is linked to the larger number of smaller attractions in these areas.
- Each attraction responding to the survey received an average of 89,610 visits in 2018: the average number of visits in 2018 was highest (at 107,676) in South East Wales, and lowest (at 52,573) in Mid Wales.
- Museums and art galleries and wildlife / nature reserves received the highest proportion of visits overall (at 25.4% and 22.2% respectively of all visits).
- Over four in ten visits to attractions in Wales in 2018 (43.6%) were made to privately owned attractions (5.3 million to free and 4.4 million to paid).

iii. Visits 2017 - 2018

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2017 and 2018 figures. Please note that this section only relates to those attractions that provided data **in both years** (171 attractions).

- Visits to these attractions rose by 4.4% from 2017 to 2018.
- Free attractions saw an increase in visit numbers year on year, rising by 9.2% (8.7 million in 2017 to 9.5 million in 2018), while visits to paid attractions dropped by 1.4% (7.1 million in 2017 to 7.0 million in 2018).
- Visitor numbers increased at attractions in all areas of Wales except the South West, which saw a small decrease of 2.2% from 2017 to 2018; South East Wales saw the highest increase year on year (of 10.5%).
- Visits to Natural Resources Wales sites increased by 9.8% year on year, with sizeable increases also evident for privately owned attractions and National Trust properties. Visits to Cadw sites fell by 6.7% from 2017 to 2018, however. Cadw visitor admission and membership prices increased in 2018.
- Average adult admission charges among those taking part in both years rose by just over 1% from 2017 to 2018 to £8.59; child admission prices rose by a slightly higher margin of 3% to £5.45.
- Among all paid attractions participating in the 2018 survey, the average adult admission charge in high season was £9.42 and the average child admission charge was £6.74.
- Adult admission charges were highest in North Wales (average £11.21), and lowest in South East Wales (average £7.75). In terms of attraction category, adventure / activity attractions charged the highest adult admission prices (average £21.55), while museums and art galleries' charges were among the lowest (average of £5.37).

iv. Operations

- Nearly half of participating attractions (47.1%) reported an increase in gross revenue in 2018 compared with 2017; just under four in ten said their revenue was similar, while one in six reported a fall in their gross revenue year on year.
- Participating attractions reported an increase of 3.3% in gross revenue in 2018 compared with 2017 overall. Food or drink attractions and wildlife /

nature reserves saw the highest increases (at +13.5% and +13% respectively).

- As in 2017, unpaid volunteers accounted for the largest proportion of workers at attractions participating in the 2018 survey (47.2%) although this proportion has dropped year on year. Full-time staff accounted for almost three in ten workers and part-time staff for around one in four workers in 2018.
- Most attractions said there had been no change in their marketing expenditure in 2018 compared to 2017, with around three in four (73.6%) reporting it was similar. Another 16% said it had risen year on year, while 10.4% reported a decline.

v. Visitor profile

- The majority of visitors overall (70.4%) to attractions participating in the 2018 survey were adults. Food or drink attractions, industrial / craft attractions and museums and galleries received the highest proportion of adult visitors, while 'other' attractions (which included two indoor activity centres), themed attractions / leisure parks and science / technology centres were most likely to attract children.
- Almost half of visitors to participating attractions in Wales in 2018 were local visitors (48.6%), with four in ten (40.3%) coming from the rest of the UK and around one in ten (11.1%) from overseas.
- Industrial / craft attractions, food or drink attractions, historic properties and science / technology centres received the highest proportion of overseas visitors in 2018, while the 'other' attractions and farm / rare breed attractions were most likely to attract local visitors. Railway / tramway / transport attractions and food or drink 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 2018. The proportion of visitors in groups / tours was much higher than average for science / technology centres (at 30.3%, although this was on a small base size of 3 attractions).
- Almost seven in ten attractions taking part (68.5%) said they were open every month of the year in 2018, while the remaining three in ten (31.5%) opened for part of the year.

- Attractions in Wales participating in the survey were most likely to be open during the months of April to September 2018, and least likely to be open during the months of January, February, November and December.

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 definition¹ 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 2018

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 2018

The UK economy expanded at its slowest annual rate in six years in 2018, after a sharp contraction in December 2017. Growth in the year was 1.4%, down from 1.7% in 2017 and the slowest rate since 2012 according to the Office for National Statistics (ONS)². The ONS attributed this to falls in factory output and car production, as well as a drop in construction, among other factors. At the same time, the services sector continued to perform well. Economists attributed weaker economic activity to continuing uncertainty around Brexit, with businesses holding back on major investments and engaging in cautionary stockpiling, as well as concerns over global trade.

Consumer price inflation (CPI) was on a downward path in 2018³. Lower oil prices were the main factor in the decline to 2.1% in December – the lowest annual rate of CPI inflation since January 2017. Average pay growth gently accelerated towards the end of 2018 with a 3.4% increase in average earnings recorded in the three months to November 2018. The number of people in work increased in this period, with the proportion of the working-age population in employment (at 75.8%) the highest since records began in 1971. This took the UK to the third highest employment rate of the G7 economies (behind Germany and Japan).

Bank of England base rates were raised again by 0.25% in August 2018 to 0.75% (after an increase of 0.25% in November 2017), but were not increased in December 2018. House prices increased by 2.5% in the year to December 2018, taking the average house price to £231,000, according to the official house price index published by the Office for National Statistics.

² Office for National Statistics (ONS): [GDP Monthly Estimate UK December 2018](#)

³ House of Commons Library Briefing Paper: [Economic Indicators January 2019](#)

2018 saw a decline in inbound tourism to the UK from the record levels set in 2017 according to VisitBritain⁴. The number of inbound visitors to the UK fell 3% to 37.9 million and the value of spending fell 7% to £22.9 billion; both of these were the second highest ever recorded. Research by VisitBritain showed that interest in visiting the UK among those living in Europe since the Brexit referendum fell from 76% in August 2016 to 69% in autumn 2018⁵.

2018 saw an increase in the volume of overnight trips to Wales by GB residents (to just over 10 million trips, an increase of 11% year on year) and an increase in their expenditure in Wales to £1,853 million. At the same time, the number of trips taken in Wales by international visitors fell to 941,000 - a decline of 13% year on year, compared to a 3% fall across the UK as a whole. International visitor expenditure increased in 2018 to £405 million, however.

There was a slight decrease in the volume and expenditure of tourism day trips taken in Wales during 2018 compared to 2017, with 95.7 million trips taken and related expenditure of £4 billion⁶.

Climatic summary for 2018⁷

2018 was warmer than average for the UK, although not as warm as 2017. The months of May, June and July were much warmer and sunnier than average. It was also a relatively dry year and high pressure dominated the summer, which was the warmest for the UK since 2006, the driest since 2003 and the sunniest since 1995. The year as a whole was ranked as the seventh warmest year since 1910. Summer 2018 was equal-warmest with the years of 1976, 2003 and 2006.

There was a period of severe winter weather in late February and early March, with the most significant spell of snow and low temperatures for the UK since 2010. Storm Ali in mid-September brought very strong winds to North West Wales, while Storm Callum in mid-October brought persistent heavy rain to South Wales.

⁴ [VisitBritain 2018 Snapshot](#)

⁵ House of Commons Library Briefing Paper: [Tourism Statistics and Policy September 2019](#)

⁶ Visit Wales: [Wales Tourism Performance 2018](#)

⁷ Met Office: [Annual Climate Summary 2018](#)

2. Methodology

2.1 Conducting the research

Fieldwork for the 2018 survey was conducted between June and early September 2019. Fieldwork cannot start 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 2018 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 485 individual attractions on the database by email on 27 June 2019. 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 July and August. Visit Wales assisted with further targeted reminders to major attractions in late July and August. 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, Dŵr Cymru Welsh Water, National Trust, Natural Resources Wales and RSPB Cymru. In total these organisations provided data for 85 attractions.

The survey was closed on 5 September 2019, 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 2017 (see Appendix I).

2.2 Survey distribution and response rate

A total of 570 attractions⁸ 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 below:

Table 2.1: Response rate

	2018	2017	2016*	2014	2013	2012
Total attractions contacted	570	571	609	478	478	481
Attractions completing the survey	248 (44%)	237 (42%)	216 (35%)	146 (30%)	173 (36%)	190 (40%)
Attractions responded but unable to provide figures or closed	20 (4%)	1 (0.2%)	N/A	9 (2%)	10 (2%)	25 (5%)
TOTAL RESPONSE RATE	268 (47%)	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 2018 was 47%, higher than in any year since 2012, and the survey returns at 268 are the highest since 2007. 248 of the 268 attractions responding to the 2018 survey were able to provide visit numbers.

In order to assess the reliability of visit figures provided, 233 of the 248 operators providing data indicated which methods they used to calculate their figures: results are shown in Table 2.2 overleaf. The figures amount to more than 100% as multiple methods are mentioned by some attractions.

Recording methods have seen little change over the years. Between 8% and 9% of attractions reported their visit numbers were estimates each year from 2016 to 2018.

⁸ This includes 485 individual attractions plus organisations accounting for a large number of tourist attractions in Wales contacted separately (which provided data for 85 attractions).

Table 2.2: Visitor numbers – recording method

Method used 2018	Number of attractions	% of attractions providing data
Ticket sales and / or group booking sales	85	36.5%
Mechanical / electronic counting	60	25.8%
Manual counting	55	23.6%
Estimate only	21	9.0%
Estimate made on basis of sample count	12	5.2%
Other*	25	10.7%

Base: attractions providing data on counting methods (233)

* Other methods include café/tearoom sales, WiFi data capture, risk forms and car counts

NB: more than one recording method can be provided

3. Top ten free and paid attractions

3.1 Top ten paid attractions

The paid attraction reporting the highest number of visitors in 2018, as in previous years, was The LC Waterpark & Leisure Complex in Swansea (772,000 visitors). Visitor numbers to the LC dropped by 3% in 2018 from 796,149 in 2017. Three new attractions feature in the top ten for the first time in 2018 – Zip World Slate Caverns and Zip World Fforest, and Nova Prestatyn.

The majority of top ten paid visitor attractions in 2018 (seven) are located in North Wales, with two in South West Wales and one in South East Wales. Four of the ten are privately owned, three are owned by a local authority/National Park, two by Cadw and one by the National Trust.

Three of these top ranking attractions are historic properties, two are theme attractions and two are activity / adventure attractions. The remainder are a farm attraction, a country park / garden and a railway / tramway / transport attraction.

The top ten paid attractions providing data for 2018 received a total of almost 3.2 million visitors, accounting for 36% of all visits made to paid attractions in 2018 - see Table 3.1 below for more details.

Table 3.1: Top ten paid attractions 2018

Name	Region	Category	Owner	No. of visits 2017	No. of visits 2018	% change	£ Adult
1 LC Waterpark & Leisure Complex	SW	THEME	PO	796,149	772,000	-3.0%	£7.00
2 Folly Farm	SW	FARM	PO	480,000	455,428	-5.1%	£16.00
3 Cardiff Castle	SE	HP	LA/NP	319,131	452,007	+41.6%	£13.00
4 Bodnant Garden	N	CP	NT	255,949	260,153	+1.6%	£14.00
5 Nova Prestatyn	N	THEME	LA/NP	N/A	250,000	N/A	£6.00
6 Caernarfon Castle	N	HP	Cadw	204,675	205,009	+0.2%	£9.50
7 Conwy Castle	N	HP	Cadw	221,652	201,961	-8.9%	£9.50
8 Zip World Slate Caverns	N	A/A	PO	190,000	195,000	+2.6%	£31.00
8 Zip World Fforest	N	A/A	PO	115,528	195,000	+68.8%	£20.00
10 Great Orme Tramway	N	R/T	LA/NP	205,495	191,613	-6.8%	£8.10

3.2 Top ten free attractions

Of the free admittance attractions providing data in 2018, the Wales Millennium Centre received the highest number of visitors (almost 1.8 million); reported visit numbers in 2018 have risen from their 2017 level of almost 1.1 million.

The top ten free attractions in 2018 are mainly museums and galleries (with four in the top ten) and wildlife and nature reserves (with three). Other free attractions in the top ten include a themed attraction (covering several sites and products), a country park and an historic property. Please note that visit data for Snowdon is now reported (and presented) differently to previous years, with visits for Walkers on Snowdon split from visits to Snowdon Mountain Railway. If both are combined, they indicate a total of 790,000 visits were made to Snowdon in 2018.

The top ten free attractions providing data for 2018 received a total of just over 6.7 million visitors and accounted for almost 50% 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 2018

	Name	Region	Category	Owner	No. of visits 2017	No. of visits 2018	% change
1	Wales Millennium Centre ⁹	SE	MAG	PO	1,082,494	1,762,281	+62.8%
2	Tir Prince Fun Park, Racecourse & Market	N	THEME	PO	*	900,000	N/A
3	Walkers on Snowdon ¹⁰	N	WL	LA/NP	654,077	650,000	-0.6%
4	St Fagans National Museum of History	SE	MAG	AC - NMW	553,090	636,859	+15.1%
5	Aberystwyth Arts Centre	M	MAG	Private	*	600,000	N/A
6	Pembrey Country Park	SW	CP	LA/NP	470,000	520,000	+10.6%
7	National Museum Cardiff	SE	MAG	AC - NMW	539,550	488,809	-9.4%
8	Newborough National Nature Reserve	N	WL	NRW	449,771	478,204	+6.3%
9	Gwydir Forest Park	N	WL	NRW	317,405	352,723	+11.1%
10	Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	N	HP	PO	333,363	342,620	+2.8%

* NP = not provided

⁹ 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 2018 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.

¹⁰ Attraction name and categorisation changed in 2018 – previously Walkers on Snowdon had been grouped with visitors to Snowdon Mountain Railway and visits reported jointly as Snowdon Summit Visitor Centre. Snowdon Mountain Railway has now been split from Walkers on Snowdon for reporting. If both are aggregated, they account for a total of 790,000 visits to Snowdon in 2018.

4. Visits 2018

This section presents an analysis of the visits data for 2018.

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.

22.2 million visits were made to attractions in Wales participating in the survey in 2018; around 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 – see Table 4.1 below.

Amongst all attractions responding to the survey, the 23 reporting 200,000 or more visitors accounted for almost half of all visits recorded in 2018 (48.8%).

Table 4.1: Overall visits by admission type 2018

Admission type	Base	No. of visits 2018	% of visits
Free	116	13,513,160	60.8%
Paid	133	8,710,160	39.2%
TOTAL	249	22,223,320	100.0%

Base: attractions providing data for 2018

Participating attractions in North Wales and South East Wales received the highest share of visits (at 40.2% and 29.6% respectively), while attractions in Mid Wales received the lowest (9.7%).

South West Wales was the only region where more visits were made to paid attractions than to free attractions in 2018 (just over 2.4 million c.f. 2.1 million visits respectively). In all other regions (particularly Mid Wales), substantially more visits were made to free attractions than to paid - see Table 4.2 overleaf for more details.

Table 4.2: Overall visits by admission type and Wales region 2018

Wales region	Free			Paid			ALL		
	Base	No. of visits 2018	%	Base	No. of visits 2018	%	Base	No. of visits 2018	%
Mid	24	1,606,290	7.2%	17	549,209	2.5%	41	2,155,499	9.7%
North	35	5,251,108	23.6%	52	3,693,697	16.6%	87	8,944,805	40.2%
South East	31	4,517,254 ¹¹	20.3%	30	2,050,983	9.2%	61	6,568,237	29.6%
South West	26	2,138,508	9.6%	33	2,416,271	10.9%	59	4,554,779	20.5%
TOTAL	116	13,513,160	60.8%	132	8,713,160	39.2%	248	22,226,320	100.0%

Base: attractions providing data for 2018

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

As in previous years, North Wales has the highest proportion of attractions participating in the 2018 survey (at 35.1%), while Mid Wales has the lowest (at 16.5%). South East Wales and South West Wales both account for around one in four attractions in the sample (24.6% and 23.8% respectively).

North Wales and South East Wales both accounted for a higher proportion of visits in 2018 than their proportion of attractions - for example North Wales furnished 35.1% of attractions in the 2018 survey but 40.2% of visits. The reverse was true of Mid Wales and to a lesser extent, South West Wales – for example, Mid Wales accounted for 16.5% of attractions but fewer than 10% of visits. This is linked to the larger number of smaller attractions in these areas. Changes over time are outlined in section 5 of the report.

Each attraction responding to the survey received an average of 89,610 visits in 2018: the average number of visits per attraction in 2018 was highest in South East Wales and North Wales (at 107,676 and 102,814 respectively) and lowest in Mid Wales (at 52,573).

¹¹ 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 2018, plus average visitor numbers 2018 and 2017 (different samples)

Wales region	Base	% of attractions	% of visits	Average no. of visits per attraction 2017	Average no. of visits per attraction 2018
Mid	41	16.5%	9.7%	22,964	52,573
North	87	35.1%	40.2%	89,698	102,814
South East	61	24.6%	29.6%	105,177	107,676¹²
South West	59	23.8%	20.5%	78,676	77,200
TOTAL	248	100.0%	100.0%	78,620	89,610

Base: attractions providing data for 2017 (237) / 2018 (248)

The most visited types of attractions in Wales in 2018 were museums and art galleries and wildlife and nature reserves, accounting for 25.4% and 22.2% of all visits respectively. Historic properties and country parks received 17.1% and 10.2% of visits respectively in the year.

The majority of visits made in 2018 to museums and galleries, wildlife and nature reserves and country parks / gardens were to free rather than paid attractions:

- Around 5.2 million visits were made to free museums and galleries in Wales in 2018, compared with around 440,000 visits to paid museums and galleries
- Almost 4.4 million visits were made to free wildlife and nature reserves, compared with 570,000 paid visits
- Almost 1.6 million visits were made to free country parks / gardens compared with just over 670,000 paid visits

The reverse was true of historic properties, with over 3 million paid visits in 2018 compared with 745,000 free visits.

¹² 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 below provides more details on visit numbers to free and paid attractions, according to attraction type.

Table 4.4: Overall visits by admission type and attraction category 2018

Attraction category	Free			Paid			ALL		
	Base	No. of visits 2018	%	Base	No. of visits 2018	%	Base	No. of visits 2018	%
Adventure / activity attraction	5	262,808	1.2%	11	838,800	3.8%	16	1,101,608	5.0%
Country park / garden	11	1,587,810	7.1%	7	671,560	3.0%	18	2,259,370	10.2%
Farm / rare breeds	0	N/A	N/A	2	465,428	2.1%	2	465,428	2.1%
Food or drink attraction	3	36,227	0.2%	2	6,000	*	5	42,227	0.2%
Historic property	7	745,534	3.4%	50	3,051,466	13.7%	57	3,797,000	17.1%
Industrial / craft attraction	7	230,907	1.0%	5	171,165	0.8%	12	402,072	1.8%
Museum / art gallery	42	5,214,966	23.5%	19	438,380	2.0%	61	5,653,346	25.4%
Railway / tramway / travel / transport / tours	2	21,008	0.1%	14	834,844	3.8%	16	855,852	3.9%
Science / technology centre	0	N/A	N/A	3	306,033	1.4%	3	306,033	1.4%
Theme park / leisure park	1	900,000	4.0%	5	1,326,000	6.0%	6	2,226,000	10.0%
Wildlife or nature reserve	36	4,358,900	19.6%	12	570,742	2.6%	48	4,929,642	22.2%
Other attraction	2	155,000	0.7%	2	29,742	0.1%	4	187,742	0.8%
TOTAL	116	13,513,160	60.8%	132	8,710,160	39.2%	248	22,223,320	100.0%

Base: attractions providing data for 2018 * less than 0.1%

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 2018 survey against the relative proportion of **visits**, by attraction category.

Historic properties and industrial / craft attractions account for almost three in ten attractions responding to the survey (27.8%) but fewer than one in five of all visits (18.9%). Railway / tramway / transport attractions also account for a slightly higher proportion of attractions in Wales than visits (6.5% of attractions but only 3.9% of visits).

In contrast, theme / leisure parks, wildlife and nature reserves and country parks and gardens received a disproportionately high share of visits in 2018 - see Table 4.5 below.

Table 4.5: Share of attractions and visits by attraction category 2018, plus average visitor numbers 2017 and 2018 (different samples)

Attraction category	Base	% of attractions	% of visits	Average no. of visits per attraction 2017	Average no. of visits per attraction 2018
Adventure / activity attraction	16	6.5%	5.0%	59,843	68,851
Country park / garden	18	7.3%	10.2%	141,393	125,521
Farm / rare breeds	2	0.8%	2.1%	111,000	232,714
Food or drink attraction	5	2.0%	0.2%	44,458	8,445
Historic property	57	23.0%	17.1%	63,596	66,614
Industrial / craft attraction	12	4.8%	1.8%	33,938	33,506
Museum / art gallery	61	24.6%	25.4%	69,302	92,678
Railway / tramway / transport	16	6.5%	3.9%	63,113	53,491
Science / technology centre	3	1.2%	1.4%	103,489	102,011
Theme park / leisure park	6	2.4%	10.0%	796,149	371,000
Wildlife or nature reserve	48	19.4%	22.2%	78,523	102,701
Other attraction	4	1.6%	0.8%	119,392	46,186
TOTAL	249	100.0%	100.0%	78,620	89,610

Base: attractions providing data for 2017 (237) / 2018 (248)

Note: some changes made to attraction categories in 2016

NB: Caution: Some small sample sizes

Privately owned attractions in Wales accounted for the highest proportion of visits in 2018 (43.6%), with slightly higher numbers of visits made to free attractions than to paid attractions in private ownership (5.3 million and 4.4 million respectively).

Attractions or properties owned by local authorities or National Parks received 17.5% of all visits to participating attractions in 2018, with considerably more of these being made to free attractions (12.1%) than paid (5.4%). Natural

Resources Wales sites accounted for 13.2% of visits in 2018 while Amgueddfa Cymru - National Museum Wales attractions accounted for 8%. All of these visits were free as neither organisation charges for general admission.

The National Trust and Cadw accounted for 7.9% of visits in 2018 and Cadw for 5.8%, with all of these being paid attractions.

In addition, two free Dŵr Cymru Welsh Water sites were included for the first time in 2018 returns, accounting for 1.6% of visits.

Table 4.6: Overall visits by admission type and ownership 2018

Ownership	Free			Paid			ALL		
	Base	No. of visits 2018	%	Base	No. of visits 2018	%	Base	No. of visits 2018	%
Cadw	-	-	-	24	1,296,135	5.8%	24	1,296,135	5.8%
Local Authority / National Park	25	269,0675	12.1%	15	1,205,171	5.4%	40	3,895,846	17.5%
Amgueddfa Cymru - National Museum Wales	7	1,785,208	8.0%	-	-	-	7	1,785,208	8.0%
The National Trust	-	-	-	22	1,747,033	7.9%	22	1,747,033	7.9%
Natural Resources Wales	29	2,938,694	13.2%	-	-	-	29	2,938,694	13.2%
Private owner / trust	50	5,333,564 ¹³	24.0%	68	4,361,570	19.6%	118	9,695,134	43.6%
RSPB	3	418,421	1.9%	3	100,251	0.5%	6	518,672	2.3%
Dŵr Cymru Welsh Water	2	346,598	1.6%	-	-	-	2	346,598	1.6%
TOTAL	116	13,513,160	60.8%	132	8,713,160	39.2%	248	22,223,320	100.0%

Base: attractions providing data for 2018

NB: Caution: Some small sample sizes

¹³ 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 4.7 overleaf illustrates the relative proportions of **attractions** responding to the survey in 2018 against the relative proportion of **visits**, by ownership.

Privately owned attractions account for almost half of the sample in 2018 (47.6%) and over four in ten visits (43.6%). Local Authority and National Park owned attractions or sites account for around one in six attractions (16.1%) and a similar proportion of visits (17.5%).

Cadw-owned attractions represent 9.7% of the sample but a slightly lower proportion of visits (5.8%), while Amgueddfa Cymru - National Museum Wales attractions account for 2.8% of the sample but 8% of all visits in 2018 – see Table 4.7 below for more details.

Table 4.7: Share of attractions and visits by ownership 2018, plus average visitor numbers 2017 and 2018 (different samples)

Ownership	Base	% of attractions	% of visits	Average no. of visits per attraction 2017	Average no. of visits per attraction 2018
Cadw	24	9.7%	5.8%	57,899	54,006
Local Authority / National Park	40	16.1%	17.5%	87,001	97,396
Amgueddfa Cymru - National Museum Wales	7	2.8%	8.0%	250,876	255,030
The National Trust	22	8.9%	7.9%	77,117	79,411
Natural Resources Wales	29	11.7%	13.2%	88,712	101,334
Private owner / trust	118	47.6%	43.6%	66,091	82,162¹⁴
RSPB	6	2.4%	2.3%	106,511	86,445
Dŵr Cymru Welsh Water	2	0.8%	1.6%	N/A	173,299
TOTAL	248	100.0%	100.0%	78,620	89,610

Base: attractions providing data for 2017 (237) / 2018 (248)

NB: Caution: Some small sample sizes

¹⁴ 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.

Amongst all the attractions responding to the 2018 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 (48.8%) in the year. Most of these larger attractions (sixteen) do not charge an admission fee and they received over six in ten of all visits to free attractions (61%). The seven paid attractions with the highest visit numbers accounted for a smaller proportion of all paid visits in the year (almost three in ten – 29.8%) - see Table 4.8 below for more details.

Table 4.8: Overall visits by admission type and range of total visits 2018

Range of total visits	Free			Paid			ALL		
	Base	No. of visits 2018	%	Base	No. of visits 2018	%	Base	No. of visits 2018	%
0 – 1,999	7	4,312	*	9	8,784	*	16	13,096	*
2,000 – 4,999	14	42,749	0.2%	11	38,082	0.2%	25	80,831	0.4%
5,000 – 9,999	10	75,936	0.3%	13	85,926	0.4%	23	161,862	0.7%
10,000 – 19,999	11	166,761	0.8%	17	231,336	1.0%	28	398,097	1.8%
20,000 – 49,999	18	575,555	2.6%	30	979,228	4.4%	48	1,554,783	7.0%
50,000 – 99,999	19	1,371,564	6.2%	25	1,828,678	8.2%	44	3,200,242	14.4%
100,000 – 149,999	16	2,112,421	9.5%	9	1,083,394	4.9%	25	3,195,815	14.4%
150,000 – 199,999	5	914,104	4.1%	11	1,858,174	8.4%	16	2,772,278	12.5%
200,000 and over	16	8,249,758 ¹⁵	37.1%	7	2,596,558	11.7%	23	10,846,316	48.8%
TOTAL	116	13,513,160	60.8%	132	8,710,160	39.2%	248	22,223,320	100.0%

Base: attractions providing data for 2018 * less than 0.1%

NB: Caution: Small sample sizes

Almost four in ten participating attractions (39.6%) reported an increase in visitor numbers in 2018 compared with 2017, when asked whether their total visit numbers had increased, stayed the same or decreased year on year. At

¹⁵ 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.

the same time, a marginally higher proportion reported their visitor numbers had fallen year on year (41.0%).

Paid attractions were more likely than free attractions to report an increase in visitor numbers in 2018 (41.5% compared with 36.8%). Attractions charging for admission were also less likely to report a decrease year on year (40% compared with 42.5%) (see Table 4.9 below).

Table 4.9: Increase / decrease in 2018 visit numbers compared with 2017

Visit numbers change 2018 c.f. 2017	Total attractions	Free attractions	Paid attractions
Base	218	87	131
Increased	39.6%	36.8%	41.5%
Stayed same	15.7%	13.8%	16.9%
Decreased	41.0%	42.5%	40.0%
Don't know	3.7%	6.9%	1.5%

Base: attractions providing data (218)

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

- Better marketing, advertising or promotion for the attraction
- Good weather in the summer months
- More events and activities or better programming
- Increased awareness of the attraction
- More social media activity / stronger presence online
- More visitors to the area
- Longer opening hours or re-opening of the full site
- Improvements or developments to the attraction e.g. new products / content.

Conversely, those saying their visitor numbers had decreased in 2018 compared with 2017 mainly attributed the decline to:

- An increase in admission prices (mentioned by Cadw, as well as a few other attractions)
- The weather.

5. Comparative analysis of visits to tourist attractions 2018 / 2017

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2018 and 2017 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 (171 in total), visit numbers increased by 4.4% year on year – see Table 5.1 below.

Table 5.1: Comparison of overall yearly visit figures 2018 / 2017

Base	No. of visits 2017	No. of visits 2018	Percentage change
171	15,775,100	16,472,592	+4.4%

Base: attractions providing data for both 2018 and 2017

Analysing the data in more detail, the number of visits to free attractions increased (by 9.2%) while visits to paid attractions in the sample in both years decreased marginally (by 1.4%) year on year - see Table 5.2 below.

Table 5.2: Comparison of overall yearly visit figures 2018 / 2017 by admission type

Admission type	Base	No. of visits 2017	No. of visits 2018	Percentage change
Free	76	8,686,144	9,485,409 ¹⁶	+9.2%
Paid	95	7,088,956	6,987,183	-1.4%
TOTAL	171	15,775,100	16,472,592	+4.4%

Base: attractions providing data for both 2018 and 2017

Visitor numbers increased in all regions of Wales except the South West, where there was a small decline of 2.2% year on year. South East Wales saw the highest increase (at +10.5%) while there were small increases of +3.1% in both North and Mid Wales – see Table 5.3 overleaf.

¹⁶ 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 2018 /2017 by region

Wales region	Base	No. of visits 2017	No. of visits 2018	Percentage change
Mid	26	870,257	897,194	+3.1%
North	63	6,365,939	6,562,338	+3.1%
South East	45	5,238,508	5,786,705 ¹⁷	+10.5%
South West	37	3,300,396	3,226,355	-2.2%
TOTAL	171	15,775,100	16,472,592	+4.4%

Base: attractions providing data for both 2018 and 2017

Sizeable increases were evident in visits to museums / galleries in 2018 (up 22.5% from 2017 – largely influenced by the increase in Wales Millennium Centre visits in 2018) and for wildlife / nature reserves (up 6.9% – partly attributable to the re-categorisation of Walkers on Snowdon in 2018¹⁸).

The sectors which saw declines were generally on very small base sizes of fewer than ten attractions – see Table 5.4 overleaf.

¹⁷ 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.

¹⁸ Attraction name and categorisation changed in 2018 – previously Walkers on Snowdon had been grouped with visitors to Snowdon Mountain Railway and visits reported jointly as Snowdon Summit Visitor Centre. Snowdon Mountain Railway has now been split from Walkers on Snowdon for reporting.

Table 5.4: Comparison of overall yearly visitor figures 2018 / 2017 by attraction category

Attraction category	Base	No. of visits 2017	No. of visits 2018	Percentage change
Adventure / activity	8	795,085	771,308	-3.0%
Country park / garden	11	1,719,869	1,728,948	+0.5%
Farm	2	490,000	465,428	-5.0%
Food or drink attraction	3	27,831	32,227	+15.8%
Historic properties	50	3,525,606	3,563,814	+1.1%
Industrial / craft attraction	9	375,621	338,631	-9.8%
Museum / art gallery	38	3,446,999	4,222,435	+22.5%
Railway / tramway / transport	11	731,338	695,361	-4.9%
Science / technology centre	3	512,025	306,033	-40.2%
Theme / leisure park	1	796,149	772,000	-3.0%
Wildlife or nature reserve	33	3,319,071	3,546,665	+6.9%
Other	2	35,506	29,742	-16.2%
TOTAL	171	15,775,100	16,472,592	+4.4%

Base: attractions providing data for both 2018 and 2017

NB: Caution: Small sample sizes

Looking at the data by ownership: visits to Natural Resources Wales attractions included in both years saw the largest increase in 2018 (up 9.8% year on year). Sizeable increases were also evident for privately owned attractions and National Trust attractions (up 7.2% and 6.3% respectively)

Amgueddfa Cymru - National Museum Wales and local authority / National Park owned attractions also saw small increases. In contrast, Cadw and RSPB saw decreases in visit numbers year on year at sites included in both years – see Table 5.5 overleaf.

Table 5.5: Comparison of overall yearly visitor figures 2018 / 2017 by ownership

Ownership	Base	No. of visits 2017	No. of visits 2018	Percentage change
Cadw	24	1,389,582	1,296,135	-6.7%
Local Authority / National Park	26	2,771,607	2,815,458	+1.6%
Amgueddfa Cymru - National Museum Wales	7	1,756,130	1,785,208	+1.7%
The National Trust	20	1,542,338	1,638,905	+6.3%
Natural Resources Wales	25	2,142,323	2,352,844	+9.8%
Private owner / trust	66	5,853,588	6,275,771 ¹⁹	+7.2%
RSPB	3	319,532	308,271	-3.5%
TOTAL	171	15,775,100	16,472,592	+4.4%

Base: attractions providing data for both 2018 and 2017

NB: Caution: Small sample sizes

5.2 Comparison of admission charges for paid attractions

Adult admission charges for paid attractions providing data for 2018 and 2017 rose by just over 1% year on year, from an average of £8.48 in 2017 to £8.59 in 2018; average child admission charges rose by a slightly higher margin over the period (3%) - see Table 5.6 below.

Table 5.6: Comparison of adult and child average admission charges (per paid attraction) 2018 / 2017

Average admission charge	2017	2018	Change
Adult	£8.48	£8.59	+1.3%
Child	£5.29	£5.45	+3.0%

Base: all paid attractions providing data for both 2018 and 2017 (82)

¹⁹ 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 5.7 below shows the distribution of admission charges for attractions by charging band in 2018 compared to 2017. Almost four in ten attractions participating in both years (39%) charged visitors an average admission fee of £8.00 or more in 2018. At the other end of the scale, almost one in ten attractions (8.5%) charged visitors £3.99 or less in 2018.

Table 5.7: Distribution of adult admission charges by range 2018 / 2017

Average admission charge	2017	2018
Less than £1.00	2.4%	2.4%
£1.01 - £1.99	1.2%	1.2%
£2.00 - £2.99	1.2%	1.2%
£3.00 - £3.99	3.7%	3.7%
£4.00 - £4.99	17.1%	19.5%
£5.00 – £5.99	12.2%	9.8%
£6.00 - £6.99	14.6%	14.6%
£7.00 - £7.99	12.2%	8.5%
£8.00 and over	35.4%	39.0%

Base: all paid attractions providing data for both 2018 and 2017 (82)

Average admission charges in 2018 for all paid attractions providing data for 2018 were highest in North Wales (£11.21 adult; £8.82 child) compared with an all-Wales average of £9.42 adult and £6.74 child. They were lowest in Mid Wales (£8.28 adult; £4.84 child) – see Table 5.8 overleaf.

Table 5.8: Average admission charges by Wales region

Attraction category	Base	Average adult admission	Average child admission
Mid	17	£8.28	£4.84
North	52	£11.21	£8.82
South East	30	£7.75	£5.05
South West	33	£8.64	£5.90
TOTAL	132	£9.42	£6.74

Base: all paid attractions providing data for 2018

Looking at admission charges by category in 2018, average admission charges for adventure and activity attractions were highest (£21.55 adult; £20.36 child). The lowest average admissions were charged at paid museums and galleries in 2018 (£5.37 adult; £3.26 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	11	£21.55	£20.36
Country park / garden	7	£8.17	£3.94
Farm / rare breeds	2	£12.00	£10.50
Food or drink attraction	2	£9.50	Free for children
Historic property	50	£6.98	£4.95
Industrial / craft attraction	5	£8.50	£6.67
Museum / art gallery	19	£5.37	£3.26
Railway / tramway / transport attraction	14	£13.36	£7.76
Science / technology centre	3	£8.00	£5.67
Themed attraction / leisure park	5	£13.40	£10.40
Wildlife or nature reserve	12	£9.78	£6.44
Other	2	£3.50	£5.50
OVERALL AVERAGE	132	£9.42	£6.74

Base: all paid attractions providing data for 2018 **NB: Caution: Small sample sizes**

In terms of attraction ownership, average admission charges for privately owned attractions were highest in 2018 (£11.61 adult; £9.00 child), followed by National Trust attractions (£9.33 adult; £4.65 child).

The lowest average admissions were charged at RSPB attractions (although there were just three charging attractions in the sample) (£5.67 adult and £3.00 child) and Cadw attractions (£5.76 adult and £3.44 child) - see Table 5.10 below.

Table 5.10: Average admission charges by ownership

Attraction category	Base	Average adult admission	Average child admission
Cadw	24	£5.76	£3.44
Local Authority / National Park	15	£6.21	£4.31
The National Trust	22	£9.33	£4.65
Private owner / trust	68	£11.61	£9.00
RSPB	3	£5.67	£3.00
OVERALL AVERAGE	132	£9.42	£6.74

Base: all paid attractions providing data for 2018

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 (47.1%) of participating attractions reported an increase in gross revenue in 2018, almost unchanged from the previous year. Almost four in ten (36.5%) reported a similar level of gross revenue in 2018 compared with the previous year (down from 40.1% in 2017), while around one in six (16.4%) said their revenue had decreased year on year (up from 12.6% in 2017) – see Table 6.1 below.

Table 6.1: Gross revenue movement over time

Gross revenue change	2017 compared with 2016 % attractions	2018 compared with 2017 % attractions
Up	47.3%	47.1%
Similar	40.1%	36.5%
Down	12.6%	16.4%
Base	182	189

Base: all attractions providing data for 2018 / 2017

Overall, average gross revenue increased by 3.3% in 2018, similar to the increase of 3.1% reported in 2017. Almost six in ten attractions (56.1%) 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 2018 / 2017

Gross revenue movement range	2017 % attractions	2018 % attractions
-50% or more	0.8%	0.8%
-21% to -50%	1.6%	0.8%
-11% to -20%	1.6%	4.9%
-1% to -10%	5.7%	8.1%
0% (no change)	60.2%	56.1%
+1% to +10%	16.3%	13.0%
+11% to +20%	7.3%	8.1%
+21% to +50%	4.9%	5.7%
+50% or more	1.6%	2.4%
AVERAGE TREND	+3.1%	+3.3%

Base: all attractions providing data for 2017 (123) / 2018 (123)

In 2018, food and drink attractions and wildlife / nature reserves reported the highest increase in gross revenue year on year (+13.5% and +13% respectively). Farm / rare breeds and adventure / activity attractions also reported sizeable average increases in gross revenue in 2018 compared with 2017 (at 11.5% and 6.8% respectively).

In contrast railway / transport attractions saw a decrease year on year of 4.7%.

Please note that the sample of attractions contributing data in 2018 and 2017 is different - see Table 6.3 overleaf.

Table 6.3: Average revenue movement by attraction category 2018 / 2017

Attraction category	2017 average revenue movement	2018 average revenue movement
Adventure / activity attraction	+3.3%	+6.8%
Country park / garden	+11.7%	-0.9%
Farm / rare breeds	+6.0%	+11.5%
Food or drink attraction	+7.5%	+13.5%
Historic property	-0.5%	+5.7%
Industrial / craft attraction	+3.4%	+1.7%
Museum / art gallery	+2.1%	+1.9%
Railway / transport attraction	-1.9%	-4.7%
Science / technology centre	+8.0%	N/A
Themed attraction / leisure park	+4.0%	-1.0%
Wildlife or nature reserve	+9.1%	+13.0%
Other	0.0%	0.0%
TOTAL	+3.1%	+3.3%

Base: all attractions providing data for 2017 (123) / 2018 (123)

6.2 Employment 2018

Attraction operators were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2018. 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 2017, unpaid volunteers accounted for the largest proportion of workers for those attractions participating in the survey (47.2%) although this proportion has dropped year on year. Full-time staff accounted for almost three in ten workers in 2018 (27.7%) while part-time staff made up a slightly lower proportion (25.1%). 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 2018

Employee type		No. of employees	%
Permanent	Full-time	1,804	19.1%
	Part-time	1,012	10.7%
	Unpaid volunteers	927	9.8%
Seasonal	Full-time	815	8.6%
	Part-time	1,360	14.4%
	Unpaid volunteers	3,535	37.4%
TOTAL		9,453	100.0%

Base: all attractions providing data for 2018 (248)

The profile of employees by attraction type varies considerably. The workforce at some types of attraction is dominated by seasonal workers. For example, themed attractions / leisure parks, historic properties, country parks / gardens and farm / rare breed attractions have much higher numbers of seasonal workers than permanent workers. For historic properties and country parks / gardens, the bulk of their seasonal workers in 2018 were unpaid volunteers.

Other attraction categories including science / technology centres, museums / art galleries and industrial / craft attractions were more likely to have permanent than seasonal workers.

Historic properties, country parks / gardens and railways / tramways / transport attractions are most likely to have unpaid volunteers, while theme parks, adventure / activity attractions and science / technology attractions are least likely - see Table 6.5 overleaf.

Table 6.5: Total employees by attraction category reported in 2018

Attraction category	Base	Permanent				Seasonal				
		FT	PT	UV	TOTAL	FT	PT	UV	TOTAL	
Adventure / activity attraction	16	No.	196	64	3	263	187	111	23	321
		%	33.6%	11.0%	0.5%	45.0%	32.0%	19.0%	3.9%	55.0%
Country park / garden	18	No.	186	72	19	277	47	94	632	773
		%	17.7%	6.9%	1.8%	26.4%	4.5%	9.0%	60.2%	73.6%
Farm / rare breeds	2	No.	52	11	0	63	87	56	1	144
		%	25.1%	5.3%	0.0%	30.4%	42.0%	27.1%	0.5%	69.6%
Food or drink attraction	5	No.	11	3	2	16	1	6	20	27
		%	25.6%	7.0%	4.7%	37.2%	2.3%	14.0%	46.5%	62.8%
Historic property	57	No.	233	226	97	556	40	231	1,568	1,839
		%	9.7%	9.4%	4.1%	23.2%	1.7%	9.6%	65.5%	76.8%
Industrial / craft attraction	12	No.	51	32	25	108	23	39	14	76
		%	27.7%	17.4%	13.6%	58.7%	12.5%	21.2%	7.6%	41.3%
Museum / art gallery	61	No.	588	402	438	1,428	36	326	521	883
		%	25.4%	17.4%	19.0%	61.8%	1.6%	14.1%	22.5%	38.2%
Railway / tramway / transport / tour	16	No.	160	24	120	304	82	62	380	524
		%	19.3%	2.9%	14.5%	36.7%	9.9%	7.5%	45.9%	63.3%
Science / technology centre	3	No.	43	42	0	85	12	33	6	51
		%	31.6%	30.9%	0.0%	62.5%	8.8%	24.3%	4.4%	37.5%
Themed attraction / leisure park	6	No.	88	16	0	104	182	241	0	423
		%	16.7%	3.0%	0.0%	19.7%	34.5%	45.7%	0.0%	80.3%
Wildlife / nature reserve	48	No.	180	81	222	483	114	151	370	635
		%	16.1%	7.2%	19.9%	43.2%	10.2%	13.5%	33.1%	56.8%
Other	4	No.	16	39	1	56	4	10	0	14
		%	22.9%	55.7%	1.4%	80.0%	5.7%	14.3%	0.0%	20.0%
TOTAL	248	1,804	1,012	927	3,743	815	1,360	3,535	5,710	

Base: all attractions providing data for 2018

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 2017 and 2018. Please note that these are different samples, and do not reflect exact like-for-like changes amongst the same attractions.

2018 figures show little change in the overall workforce at participating attractions, with the total number of workers at a similar level to 2017 (at 9,453 in 2018, compared with 9,376 in 2017). There are a number of changes in the categories of workers, however: firstly, the number of staff (both full-time and part-time, as well as permanent and seasonal) has increased year on year; at the same time, the number of unpaid volunteers reported has decreased (particularly year-round volunteers) - see Table 6.6 below.

Table 6.6: Total employees reported in 2018 and 2017

Employee type		No. of employees 2017	No. of employees 2018	% change
Permanent	Full-time	1,576	1,804	+14.5%
	Part-time	894	1,012	+13.2%
	Unpaid volunteers	2,041	927	-54.6%
Seasonal	Full-time	364	815	+23.9%
	Part-time	642	1,360	+11.8%
	Unpaid volunteers	3,859	3,535	-8.4%
TOTAL		9,376	9,453	+0.8%

Base: all attractions providing data for 2017 (237) / 2018 (248)

6.3 Marketing expenditure 2018 / 2017

As in 2017, almost three quarters of the attractions participating in the 2018 research who answered this question (73.6%) reported no change in their marketing expenditure in 2018 compared with the previous year.

Slightly more attractions answering this question reported an increase in their marketing spend year on year than reported a decrease, with levels of 16.0% and 10.4% respectively - see Table 6.7 overleaf.

Table 6.7: Marketing expenditure levels – 2018 vs. 2017

Admission type	No. of attractions	% attractions
Up	34	16.0%
Similar	156	73.6%
Down	23	10.4%
Base	213	100.0%

Base: all attractions providing data for 2018 (213)

7. Visitor profile 2018

For all attraction types except for themed attractions / leisure parks and 'other' (which included two indoor activity centres) the majority of visitors to attractions were adults. Overall, adults accounted for around seven in ten visits (70.4%) and children around three in ten visits (29.6%) in 2018.

Children accounted for over half of visits to themed attractions / leisure parks and 'other' attractions (at 52.5% and 53.8% of visits respectively). Adventure / activity attractions and science / technology attractions also attracted higher than average levels of visits from children (at 40.8% and 40.7% respectively). 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 93%, 80% and 78.1% respectively of visits to these categories of attraction in 2018 - see Table 7.1 below.

Table 7.1: Proportion of adult and child visits by attraction category 2018

Attraction category	Base	Average % adult visits	Average % child visits
Adventure / activity attraction	16	59.2%	40.8%
Country park / garden	18	66.6%	33.4%
Farm / rare breeds	2	62.5%	37.5%
Food or drink attraction	5	93.0%	7.0%
Historic property	57	67.8%	32.2%
Industrial / craft attraction	12	80.0%	20.0%
Museum / art gallery	61	78.1%	21.9%
Railway / tramway / tour	16	70.3%	29.6%
Science / technology centre	3	59.3%	40.7%
Themed attraction / leisure park	6	47.5%	52.5%
Wildlife / nature reserve	48	70.6%	29.4%
Other	4	46.3%	53.8%
TOTAL	248	70.4%	29.6%

Base: all attractions providing data for 2018 - **NB: Caution: Small sample sizes**

Almost half of visitors to attractions in Wales in 2018 were local visitors (48.6%), with four in ten (40.3%) coming from the rest of the UK and around one in ten (11.1%) from overseas.

Industrial / craft attractions, food or drink attractions, historic properties and science / technology centres in Wales received the highest proportion of overseas visitors (at 17.2%, 15%, 14.7% and 14.5% respectively, compared with an average of 11.1%), while the small number of 'other' attractions in the sample ²⁰received the highest proportion of local visitors (at 70% compared with an average of 48.7%). Railway / tramway / transport and food or drink attractions were most likely to attract visitors from the rest of the UK (54.7% and 50% respectively, compared with an average of 40.3%) - see Table 7.2 overleaf.

²⁰ 'Other' attractions comprise two children's activity centres, a harbour and a tourist information / visitor centre.

Table 7.2: Origin of visitors by attraction category 2018

Attraction category	Base	Average % overseas visitors	Average % local visitors	Average % visitors from rest of UK
Adventure / activity attraction	16	6.1%	56.8%	37.1%
Country park / garden	18	8.0%	57.5%	34.5%
Farm / rare breeds	2	3.0%	66.0%	31.0%
Food or drink attraction	5	15.0%	35.0%	50.0%
Historic property	57	14.7%	41.6%	43.7%
Industrial / craft attraction	12	17.2%	36.7%	46.1%
Museum / art gallery	61	11.4%	53.5%	35.1%
Railway / tramway / tour	16	12.3%	33.0%	54.7%
Science / technology centre	3	14.5%	46.5%	39.0%
Themed attraction / leisure park / centre	6	10.2%	51.7%	38.2%
Wildlife or nature reserve	48	9.6%	43.2%	47.1%
Other	4	6.3%	70.0%	23.8%
TOTAL	248	11.1%	48.6%	40.3%

Base: attractions providing data in 2018 - **NB: Caution: Small sample sizes**

Visitors arriving in organised groups or tours were estimated to account for an average of 13.1% of visits made in 2018 across all participating attractions (the same proportion as in 2017, the first year this was captured).

The proportions of visitors in organised groups / tours was highest for science / technology centres and industrial / craft attractions categories (at 30.3% and 17.2% respectively) and lowest for farm / rare breed attractions and historic properties in the sample (at 6.5% and 9.7% respectively) - see Table 7.3 overleaf.

Table 7.3: Proportion of visitors in organised groups / tours by category 2018

Attraction category	Base	Average % visiting in groups / tours
Adventure / activity attraction	16	14.4%
Country park / garden	18	10.0%
Farm / rare breeds	2	6.5%
Food or drink attraction	5	11.4%
Historic property	57	9.7%
Industrial / craft attraction	12	17.2%
Museum / art gallery	61	15.4%
Railway / tramway / tour	16	14.8%
Science / technology centre	3	30.3%
Themed attraction / leisure park	6	12.2%
Wildlife / nature reserve	48	11.3%
Other	4	15.0%
TOTAL	248	13.1%

Base: all attractions providing data for 2018 - **NB: Caution: Small sample sizes**

Attractions participating in the 2018 survey were asked whether they were open for the whole of 2018.

Almost seven in ten attractions that answered this question (68.5%) said they were open every month in 2018, while the remaining three in ten (31.5%) opened for certain months of the year, not all. The attractions open all year round account for 81.1% of visits made in 2018 – see Table 7.4 overleaf.

Table 7.4: Whether attractions are open all year 2018

Open all year	Base	% of attractions	% of visits
Yes	150	68.5%	81.1%
No	69	31.5%	18.9%
TOTAL	219	100.0%	100.0%

Base: attractions providing data for 2018

Table 7.5 below illustrates which months of the year attractions in Wales taking part in the survey were open in 2018. Attractions were most likely to be open in the months of April to September, with at least 95% open during each of these months. Over eight in ten were open in the shoulder months of March and October, while the proportion of attractions open to visitors dropped to its lowest level (of around seven in ten) in January, February, November and December 2018. Only a handful of attractions (between one and four) reported they were closed in any of the peak months of June to September. No reasons were given.

Table 7.5: Proportion of attractions open by month 2018

Month 2018	% open in month
January	69.4%
February	76.3%
March	83.6%
April	95.9%
May	98.2%
June	99.5%
July	99.1%
August	99.1%
September	98.6%
October	90.0%
November	74.4%
December	75.8%

Base: attractions providing data for 2018 (219)

8. Alphabetical list of attractions responding to the survey 2018

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS ²¹	£ ADULT ADMISSION
123 Jump Ltd	SE	PO	A/A	110,000	_22
1940's Swansea Bay	SW	PO	MAG	10,500*	£8.00
Aberconwy House	N	NT	HP	21,682	£4.56
Aberdulais Tin Works and Waterfall	SW	NT	IND	28,478	NP
Abergavenny Museum	SE	LA/NP	MAG	26,449	-
Aberystwyth Arts Centre	M	PO	MAG	600,000*	-
Aberystwyth Cliff Electric Railway	M	PO	R/T	80,000*	£5.00
Aberystwyth University School of Art Museum and Galleries	M	LA/NP	MAG	9,000*	-
Afan Argoed Forest Park	SW	NRW	WL	193,997*	-
Alyn Waters Country Park	N	LA/NP	CP	83,285	-
Amgueddfa Ceredigion Museum	M	LA/NP	MAG	69,553	-
Amgueddfa Lloyd George Museum	N	LA/NP	MAG	5,298	£6.00
Amgueddfa Syr Henry Jones	N	PO	MAG	348*	-
Amlwch Copper Kingdom Centre	N	PO	IND	5,800*	£6.00
Andrew Logan Museum of Sculpture	M	PO	MAG	942	£3.00
Attic Gallery	SW	PO	MAG	5,000*	-
Battlefield Live Pembrokeshire	SW	PO	A/A	3,000*	-
Beacon Park Boats	M	PO	R/T	2,800*	-
Beaumaris Castle	N	Cadw	HP	98,827	£6.90
Big Pit National Coal Museum	SE	AC-NMW	MAG	146,791	-
Black Mountain Centre (The)	SW	PO	OTH	75,000*	-
Blaenavon Ironworks	SE	Cadw	HP	35,500	£5.80
Blaenavon World Heritage Centre	SE	LA/NP	IND	40,470*	-
Blaina Heritage Museum	SE	PO	MAG	3,585	-
Bluestone Brewing Company	SW	PO	F/D	5,000*	-
Bodnant Garden	N	NT	CP	260,153	£14.00
Bodrhyddan Hall	N	PO	HP	3,600*	£7.00
Brechfa Forest	SW	NRW	WL	9,278*	-
Brecon Mountain Railway	SE	PO	R/T	74,770*	£14.00
Buzz Trampoline Park (formerly Go Air)	SE	PO	A/A	84,000*	£9.00
Byd Mary Jones World	N	PO	MAG	2,894	£4.00
Cadair Idris Visitor Centre	N	PO	CP	6,000*	-
Caerau Gardens	N	PO	CP	2,000*	£5.00

²¹ Estimated visit figures supplied by operators are indicated with an asterisk *

²² Free for adults but an admission charge for children

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Caerleon Roman Fortress & Baths	SE	Cadw	HP	56,332	£4.20
Caernarfon Airworld Aviation Museum	SE	PO	MAG	6,725	£7.00
Caernarfon Castle	N	Cadw	HP	205,009	£9.50
Caerphilly Castle	SE	Cadw	HP	108,315	£8.50
Canaston Woods	SW	NRW	WL	7,192*	-
Canolfan Gelfyddydau Plas Glyn-y-Weddw Arts Centre	N	PO	MAG	143,478	-
Canolfan Rhiannon	M	PO	IND	8,000*	-
Cantref Adventure Farm	M	PO	A/A	50,000*	£10.00
Cardiff Castle	SE	LA/NP	HP	452,007	£13.00
Cardiff Open Top Tours	SE	PO	R/T	34,980	£14.00
Carew Castle and Tidal Mill	SW	LA/NP	HP	47,221	£6.00
Carmarthen Castle	SW	LA/NP	HP	18,862*	-
Carmarthenshire County Museum	SW	LA/NP	MAG	9,669	-
Castell Coch	SE	Cadw	HP	50,511	£6.90
Castle and Regimental Museum Monmouth (The)	SE	LA/NP	MAG	4,861	-
Ceunant Llenyrch National Nature Reserve	N	NRW	WL	11,019*	-
Chepstow Castle	SE	Cadw	HP	56,261	£6.90
Chirk Castle and Garden	N	NT	HP	171,943	£12.60
Cilgerran Castle	M	Cadw	HP	14,884	£4.00
Clerkenhill Adventure Farm	SW	PO	A/A	18,000*	£8.00
Coed Cerrig-y-Gleisiad National Nature Reserve	SE	NRW	WL	82,578*	-
Coed y Brenin Forest Park	N	NRW	WL	137,714*	-
Coedydd Aber National Nature Reserve	M	NRW	WL	65,602*	-
Colby Woodland Garden	SW	NT	CP	93,617	£7.26
Conwy Castle	N	Cadw	HP	201,961	£9.50
Conwy Suspension Bridge	N	NT	HP	18,717	£1.65
Conwy Water Gardens	N	PO	CP	55,000*	-
Corris Craft Centre	M	PO	IND	55,000*	-
Corris Mine Explorers	M	PO	A/A	1,300*	£14.00
Cosmeston Lakes Country Park	SE	LA/NP	CP	250,000*	-
Cosmeston Medieval Village	SE	LA/NP	HP	3,678	£5.00
Court Cupboard Gallery	SE	PO	MAG	2,996	-
Criccieth Castle	N	Cadw	HP	47,411	£5.50
Cwm Rhaeadr	SW	NRW	WL	3,841*	-
Cwm Weeg Gardens	M	PO	CP	400*	£5.00
Cwmcarn Forest	SE	NRW	CP	182,946*	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Cwmduad / Nant Gronw	SW	NRW	WL	3,796*	-
Cwrw Llyn	N	PO	F/D	5,000*	£7.00
Cyfarthfa Castle Museum and Art Gallery	SE	LA/NP	MAG	62,593	£2.00
Cynon Valley Museum and Gallery	SE	PO	MAG	18,100*	-
DangerPoint	N	PO	OTH	7,742	£4.00
Denbigh Castle	N	Cadw	HP	10,623	£4.00
Dinas Rock	M	NRW	WL	48,387*	-
Dolaucothi Gold Mines	SW	NT	IND	23,887	
Dyfed Shire Horse Farm	SW	PO	Farm	10,000*	£8.00
Dyffryn Gardens	SE	NT	CP	141,261	£9.90
Dyfi Forest (incl Tan-y-Coed and Pen-y-Bryn)	M	NRW	WL	44,539*	-
Dylan Thomas Boathouse	SW	LA/NP	MAG	29,182*	£5.00
Ebbw Vale Works Museum (The)	SE	PO	IND	632	-
Egypt Centre, Swansea	SW	PO	MAG	22,143	-
Elan Valley Visitor Centre	M	DCWW	WL	202,418*	-
Electric Mountain Visitor Centre	N	PO	SC/T	80,000*	£9.00
Erddig	N	NT	HP	172,948	£12.80
Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	SE	PO	MAG	124,004	£13.00
Fishguard's Last Invasion Tapestry (The)	SW	PO	MAG	12,186	-
Folly Farm	SW	PO	Farm	455,428	£16.00
Fourteen Locks Canal Centre	SE	PO	HP	60,152	-
Garwnant Visitor Centre	SE	NRW	CP	92,587*	-
Gate (The)	SW	PO	MAG	27,222*	-
Gilfach Nature Reserve	M	PO	WL	12,000*	-
Go Below Underground Adventures	N	PO	A/A	11,000*	£65.00
Goytre Wharf Activity Centre	SE	PO	A/A	40,000*	-
Great Orme Country Park Visitor Centre	N	LA/NP	CP	210,008	-
Great Orme Tramway	N	LA/NP	R/T	191,613*	£8.10
Greenfield Valley Heritage Park	N	LA/NP	CP	13,000*	£7.00
GreenWood Family Park	N	PO	Theme	150,000*	£16.00
Gregynog Hall	SE	PO	HP	1,800*	£4.00
Gwydir Forest Park	N	NRW	WL	352,723*	-
Gypsy Wood Park	N	PO	Theme	44,000*	£8.00
Harlech Beach National Nature Reserve	N	NRW	WL	134,914*	-
Harlech Castle	N	Cadw	HP	108,981	£6.90

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Holyhead Maritime Museum	N	PO	MAG	4,861	£5.00
Home Front Experience (The)	N	PO	MAG	10,000*	£4.00
Howell Harris Museum	M	PO	MAG	2,100*	-
Inigo Jones Slate Works	N	PO	IND	38,000*	£6.50
John Street Gallery	SW	PO	MAG	257*	-
Joseph Parry's Ironworkers Cottage	SE	LA/NP	IND	441	-
Kidwelly Castle	SW	Cadw	HP	34,519	£4.00
King Arthur's Labyrinth	M	PO	HP	33,400*	£12.00
Kymin (The)	SE	NT	HP	5,789	NP
Lampeter Town Museum	M	PO	MAG	848	-
Laugharne Castle	SW	Cadw	HP	14,619	£4.00
LC Waterpark and Leisure Complex	SW	PO	Theme	772,000	£7.00
Llancaiach Fawr Manor	SE	PO	HP	53,661	£9.00
Llandaff Cathedral	SE	PO	HP	500*	£10.00
Llandegfedd Visitor Centre	SE	PO	WL	188,720*	-
Llanerchaeron	M	NT	HP	48,354	£7.81
Llanfair Slate Caverns	N	PO	A/A	24,000*	£6.00
Llanfyllin Workhouse History Centre	M	PO	HP	2,400*	-
Llangollen Railway	N	PO	R/T	98,000*	£14.00
Llanyrafon Mill	SE	LA/NP	IND	364*	-
Llyn Brenig	N	NRW	WL	124,256*	-
Llyn Brenig Visitor Centre	N	DCWW	WL	144,180*	-
Llyn Mair National Nature Reserve	N	NRW	WL	19,996*	-
Manor House Wildlife Park	SW	PO	WL	76,517	£14.00
Menai Bridge Community Heritage Trust	N	PO	MAG	3,500*	£3.00
Merthyr Mawr Warren National Nature Reserve	SE	NRW	WL	71,317*	-
Milford Haven Heritage & Maritime Museum	SW	PO	MAG	2,589	£4.00
Moel Famau Forest	N	NRW	WL	86,086*	-
Mold Library and Museum	N	PO	MAG	158,441	-
MOMA Machynlleth	M	PO	MAG	22,986	-
Monty's Brewery Visitor Centre	M	PO	F/D	8,540*	-
Morfa Dyffryn National Nature Reserve	N	NRW	WL	77,303*	-
Museum of Cardiff (formely Cardiff Story Museum)	SE	LA/NP	MAG	133,421	-
Museum of Speed	SW	PO	MAG	14,958	£2.00
Nant Gwrtheyrn Hall	N	PO	HP	45,000*	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Nant yr Arian	M	NRW	WL	111,826*	-
Nantclwyd-Y-Dre	N	LA/NP	HP	2,230*	£7.00
Narrow Gauge Railway Museum	N	PO	R/T	18,208	-
National Botanic Garden of Wales (The)	SW	PO	CP	161,129	£9.00
National Coracle Centre (The)	SW	PO	MAG	2,270	-
National Museum Cardiff	SE	AC-NMW	MAG	488,809	-
National Roman Legion Museum	SE	AC-NMW	MAG	54,264	-
National Slate Museum	N	AC-NMW	MAG	141,762	-
National Trust Stackpole	SW	NT	WL	40,549	NP
National Waterfront Museum	SW	AC-NMW	MAG	285,340	-
National Wetland Centre Wales (Llanelli Wetland Centre)	SW	PO	WL	68,460	£10.00
National Wool Museum	M	AC-NMW	MAG	31,383	-
Newborough National Nature Reserve & Forest	N	NRW	WL	478,204*	-
Newport Cathedral (St Woolos)	SE	PO	HP	4,500*	-
Newport Museum & Art Gallery	SE	LA/NP	MAG	31,902	-
Newport Transporter Bridge	SE	LA/NP	R/T	16,354	£3.00
Newport Wetlands Nature Reserve	SE	NRW	WL	89,516*	-
Newton House, Dinefwr Park & Castle	SW	NT	HP	82,370	NP
Newtown Textile Museum	M	PO	MAG	1,422*	-
North Wales Bowls Centre (The)	N	PO	A/A	24,808*	-
Nova Prestatyn	N	LA/NP	Theme	250,000*	£6.00
Oakwood Theme Park	SW	PO	Theme	110,000*	£30.00
Ocean Lab Sea Môr Aquarium	SW	LA/NP	WL	4,436	£4.00
Old Station Tintern (The)	SE	LA/NP	CP	25,175*	-
Oriel Mon	N	LA/NP	MAG	81,812	-
Oriel y Parc	SW	LA/NP	IND	126,000	-
Oxwich Castle	SW	Cadw	HP	5,999	£4.00
Oxwich National Nature Reserve	SW	NRW	WL	12,391*	-
Parc Gwledig Padarn/Padarn Country Park	N	LA/NP	CP	139,143*	-
Parc Howard Museum	SW	PO	MAG	10,568	-
Pembrey Country Park	SW	LA/NP	CP	520,000*	-
Pembroke Dock Heritage Centre	SW	PO	MAG	8,396	£5.00
Penrhyn Castle	N	NT	HP	118,833	£12.27

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Picton Castle and Gardens	SW	PO	HP	38,680	£13.00
Plas Mawr	N	Cadw	HP	31,561	£6.90
Plas Newydd	N	NT	HP	151,714	£11.60
Plas yn Rhiw	N	NT	HP	20,519	NP
Playbarn (The)	SE	PO	A/A	28,500*	£0.00
Pontcysyllte Aqueduct and Trevor Basin Visitor Centre	N	PO	HP	342,620	-
Pontypridd Museum	SE	LA/NP	MAG	22,195	-
Porth y Swnt	N	NT	WL	13,428	NP
Porthcawl Museum	SW	LA/NP	MAG	7,589	£1.00
Powis Castle and Garden	M	NT	HP	155,805	£13.00
Principality Stadium Tours	SE	PO	R/T	48,337	£13.00
Quackers Play Centre	M	PO	OTH	22,000*	£3.00
Quarry Hospital Visitor Centre	N	LA/NP	MAG	16,299*	-
Raglan Castle	SE	Cadw	HP	64,475	£6.90
Regimental Museum of The Royal Welsh (The)	M	PO	MAG	10,217	£5.00
Rheilffordd Llyn Tegid / Bala Lake Railway	N	PO	R/T	33,000*	£12.00
Rhiw Valley Light Railway	M	PO	R/T	500*	£6.00
Rhondda Heritage Park	SE	LA/NP	MAG	44,970	£7.00
Rhossili, Worm's Head and Visitor Centre	SW	NT	WL	67,579	NP
Rhuddlan Castle	N	Cadw	HP	22,784	£4.00
Rhyl Library, Museum and Arts Centre	N	LA/NP	MAG	118,122	-
Ribride	N	PO	R/T	15,861	£24.00
Robert Owen Memorial Museum	M	PO	MAG	2,000*	-
Royal Mint Experience (The)	SE	LA/NP	IND	75,000*	£13.00
RSPB Conwy	N	RSPB	WL	79,850	£5.00
RSPB Lake Vyrnwy	M	RSPB	WL	190,000*	-
RSPB Newport Wetlands Environmental Education and Visitor Centre	SE	RSPB	WL	110,432*	-
RSPB Ramsey Island	SW	RSPB	WL	4,500*	£6.00
RSPB South Stack	N	RSPB	WL	117,989*	-
RSPB Ynys-hir Reserve	M	RSPB	WL	15,901	£6.00
Rug Chapel	N	Cadw	HP	1,342	£4.00
Ruthin Craft Centre Gallery	N	LA/NP	MAG	69,232	-
Saundersfoot Harbour	SW	PO	OTH	80,000*	-
Secret Owl Garden (The)	SW	PO	WL	20,000*	£4.00
Snowdon Mountain Railway	N	PO	R/T	140,000*	£29.00
South Wales Miners Museum	SE	PO	MAG	1,000*	£3.00

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
St David's Bishop Palace	SW	Cadw	HP	25,412	£4.00
St David's Cathedral	SW	PO	HP	272,000*	-
St Fagans National Museum of History	SE	AC-NMW	MAG	636,859	-
St Winefride's Well	N	PO	HP	32,236	£1.00
Stackpole Gardens and Visitor Centre	N	PO	CP	23,666*	-
Stackpole National Nature Reserve	SW	NRW	WL	298,496*	-
Strata Florida Abbey	M	Cadw	HP	7,232	£4.00
Surf Snowdonia	N	PO	A/A	140,000*	-
Swansea Community Boat Trust "Copper Jack"	SW	PO	R/T	6,429*	£9.00
Talacre	N	NRW	WL	142,393*	-
Techniquet	SE	PO	SC/T	153,500*	£8.00
Techniquet Glyndwr	N	PO	SC/T	72,533*	£7.00
The National Showcaves Centre for Wales (Dan yr Ogof)	SW	PO	MAG	88,162	£15.00
Thomas Shop and Museum (The)	M	PO	MAG	2,500*	-
Tintern Abbey	SE	Cadw	HP	74,613	£6.90
Tir Prince Fun Park, Raceway and Market	N	PO	Theme	900,000*	-
Tredegar House	SE	NT	HP	80,547	£9.79
Tregaron (Cors Caron) National Nature Reserve	M	NRW	WL	42,131*	-
Tretower Court and Castle	M	Cadw	HP	13,274	£6.90
Tudor Merchant's House	SW	NT	HP	25,066	NP
Tŷ Halen, Anglesey Saltcote	N	PO	F/D	22,687	-
Tŷ Mawr Wybrnant	N	NT	HP	3,794	£4.00
University of South Wales Art Collection Museum	SE	PO	MAG	2,100*	-
Vale of Rheidol Railway	M	PO	R/T	60,000*	£22.00
Valle Crucis Abbey	N	Cadw	HP	5,690	£4.00
Van Road Caerphilly (Mountain Biking)	SE	NRW	WL	17,132*	-
Voyages of Discovery	SW	PO	WL	20,000*	£26.00
Wales Millennium Centre	SE	PO	MAG	1,762,281*	-
Walkers on Snowdon	N	LA/NP	WL	650,000*	-
Welsh Mountain Zoo (National Zoological Society of Wales)	N	PO	WL	159,522	£13.00
Welsh Wildlife Centre (The)	SW	PO	WL	80,000*	-
Welshpool and Llanfair Light Railway	M	PO	R/T	35,000*	£14.00
White Castle Vineyard	SE	PO	F/D	1,000*	£12.00
Wrexham Museum	N	LA/NP	MAG	34,412	-

ATTRACTION NAME	REGION	OWNED	CATEGORY	2018 VISITS	£ ADULT ADMISSION
Xcel Bowl	SW	PO	A/A	55,000*	-
Ynyslas National Nature Reserve	M	NRW	WL	70,855*	-
Yr Ysgwrn	N	PO	HP	8,237*	£6.00
Zip World Fforest	N	PO	A/A	195,000*	£20.00
Zip World Penrhyn Quarry	N	PO	A/A	122,000*	£74.00
Zip World Slate Caverns	N	PO	A/A	195,000*	£31.00

APPENDICES

APPENDIX I

Questionnaire

VISITS TO WELSH TOURIST ATTRACTIONS 2018

If you are not able to provide exact figures please supply us with your best estimates.

Name of attraction: _____

VISITORS

1 What were the visitor numbers to your attraction during the 2018 calendar year? Please exclude special events outside normal opening hours or any private hire.

i. Total visits numbers in 2018 (paid and free combined) Is this number: exact? An estimate?

ii. Visits numbers in 2018 for paid visits only Is this number: exact? An estimate?
(if no paid, please enter 0)

2a Compared to 2017, 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 2018 (paid and free) were:

Adults % }
 Children % } =100% Are these percentages: Exact? An estimate?

4b What percentage of your total visitors, in 2018, were visiting in organised groups or tours?

% Exact? Estimate?

5 Did you charge for admission to the main attraction in 2018?

Yes No

6 (IF YES) What was the standard admission charge (in high season/ summer) per person for the main attraction in 2018 (including VAT)? Please enter 0 if no charge or not applicable

Adult £ p Child £ p Car parking fee £ p

7 What percentage of visitors in 2018 were from:

Overseas % }
 Wales % } =100%
 Rest of UK (excl. Wales) % }
 Are these percentages: Exact? An estimate?

8 Were you open for the whole of 2018 (that is every month)? Yes No

9 (IF NO) Please tick the months you were open in 2018

Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec

OPERATIONS

10 How did the attraction's gross revenue in 2018 compare with 2017?

Up → If known, what was the percentage increase? %

Similar

Down → If known, what was the percentage decrease? %

HUMAN RESOURCES

11 How many people were employed in any visitor-related activities in the attraction in 2018, 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

Are these numbers: Exact?

An estimate?

MARKETING

12 Compared with 2017, was expenditure on marketing activities in 2018: Up Down Similar

Thank you

APPENDIX II

Visit Numbers 2015 - 2018

Name	2015	2016	2017	2018
123 Jump Ltd	-	-	-	110,000
1940's Swansea Bay	9,880	10,286	10,345	10,500
Aberconwy House	21,850	22,039	22,773	21,682
Aberdulais Tin Works & Waterfall	26,855	26,129	30,301	28,478
Abergavenny Museum & Castle	-	-	28,530	26,449
Aberystwyth Arts Centre	588,861	-	-	600,000
Aberystwyth Cliff Electric Railway	-	64,038	64,000	80,000
Aberystwyth University, School of Art Gallery & Museum	-	11,000	11,000	9,000
Afan Forest Park	208,473	218,319	198,638	193,997
Airworld Aviation Museum	-	7,059	7,299	6,725
Alyn Waters Country Park Visitor Centre	-	108,382	-	83,285
Amgueddfa Syr Henry Jones	-	522	-	348
Amlwch Copper Kingdom	7,897	-	5,890	5,800
Andrew Logan Museum of Sculpture	-	-	1,800	942
Attic Gallery	-	2,719	-	5,000
Bala Lake Railway	-	32,000	-	33,000
Battlefield Live Pembrokeshire	-	-	-	3,000
Beacon Park Boats Ltd	-	-	-	2,800
Beaumaris Castle	82,368	82,335	90,807	98,827
Big Pit National Coal Museum	147,085	109,008	141,969	146,791
Black Mountain Centre (The)	-	-	-	75,000
Blaenavon Ironworks	29,107	29,468	39,366	35,500
Blaenavon World Heritage Centre	-	43,605	42,228	40,470
Blaina Heritage Museum	5,689	-	-	3,585
Bluestone Brewing Company	-	10,000	-	5,000
Bodnant Garden	226,998	242,898	255,949	260,153
Bodrhyddan Hall	1,878	1,237	1,500	3,600
Brechfa Forest	14,847	-	10,363	9,278
Brecon Mountain Railway	-	76,371	80,000	74,770
Byd Mary Jones World	6,466	-	3,300	2,894
Cadair Idris Visitor Centre	-	20,136	57,166	6,000
Caerau Gardens	-	-	-	2,000
Caerleon Roman Fortress and Baths	60,192	61,119	61,208	56,332
Caernarfon Castle	195,352	195,151	204,675	205,009
Caerphilly Castle	93,421	101,624	143,869	108,315
Canaston Woods	-	-	8,615	7,192
Canolfan Rhiannon	-	-	-	8,000
Cantref Adventure Farm Ltd	-	-	-	50,000
Cardiff Castle	-	301,349	319,131	452,007

Name	2015	2016	2017	2018
Cardiff Story Museum	-	-	-	133,421
Carew Castle & Tidal Mill	-	45,432	48,744	47,221
Carmarthen Castle	-	24,522	23,534	18,862
Carmarthenshire County Museum	-	-	11,641	9,669
Castell Coch	69,004	69,789	75,710	50,511
Castle and Regimental Museum Monmouth	4,432	-	4,056	4,861
Ceredigion Museum and Gallery	-	-	22,974	69,553
Ceunant Llenyrch	-	-	9,890	11,019
Chepstow Castle	59,463	59,868	59,781	56,261
Chirk Castle and Garden	143,327	150,414	162,351	171,943
Cilgerran Castle	19,416	20,347	17,385	14,884
City Sightseeing Tours Cardiff	-	10,000	78,320	34,980
Clerkenhill Adventure Farm and Frizbee Golf	-	-	-	18,000
Coed y Brenin Forest Park	143,233	162,021	147,489	137,714
Coed y Cerrig National Nature Reserve	-	-	10,792	8,257
Coedydd Aber National Nature Reserve	-	-	42,759	65,602
Colby Woodland Garden	43,089	47,138	47,102	93,617
Conwy Castle	204,172	208,887	221,652	201,961
Conwy Nature Reserve	74,217	76,501	83,448	79,850
Conwy Suspension Bridge	-	21,350	21,350	18,717
Conwy Water Gardens	-	-	-	55,000
Corris Craft Centre	-	-	-	55,000
Corris Mine Explorers	-	-	-	1,300
Cosmeston Lakes Country Park	-	-	250,000	250,000
Cosmeston Medieval Village	-	-	41,645	3,678
Court Cupboard Gallery	-	3,269	3,360	2,996
Criccieth Castle	45,715	47,935	42,863	47,411
Cwm Rhaeadr	-	-	-	3,841
Cwm Weeg Gardens	-	-	601	400
Cwmcarn Forest	193,802	224,932	191,426	182,946
Cwmduad / Nant Gronw	-	-	3,152	3,796
Cwrw Llyn	-	-	-	5,000
Cyfarthfa Castle Museum	55,057	50,693	-	62,593
Cynon Valley Museum & Gallery	-	-	8,015	18,100
DangerPoint	781	755	7,506	7,742
Denbigh Castle	10,154	10,555	10,156	10,623
Dinas Rock	39,077	32,094	49,253	48,387
Dolaucothi Gold Mines	22,420	22,296	26,134	23,887
Dyfed Shire Horse Farm	-	-	10,000	10,000
Dyffryn Gardens	90,668	111,522	128,842	141,261
Dyfi Forest	-	-	42,397	44,539
Dylan Thomas Boathouse	22,869	-	-	29,182
Ebbw Vale Works Museum	924	755	814	632
Egypt Centre - Museum of Egyptian Antiquities	-	20,518	-	22,143
Elan Valley Visitor Centre	-	193,000	-	202,418

Name	2015	2016	2017	2018
Electric Mountain Visitor Centre	132,000	-	250,000	80,000
Erddig	143,075	162,911	163,758	172,948
Firing Line: Cardiff Castle Museum of the Welsh Soldier	74,170	87,696	115,339	124,004
Folly Farm	500,000	490,000	480,000	455,428
Fourteen Locks Canal Centre	-	43,423	-	60,152
Garwnant Visitor Centre	85,725	109,135	99,110	92,587
Gate (The)	38,961	-	40,015	27,222
Gilfach Nature Reserve	-	-	-	12,000
Go Air Trampoline Park	-	152,000	-	84,000
Go Below Underground Adventures	-	36,646	23,000	11,000
Goytre Wharf Heritage Activity & Study Centre	-	30,000	-	40,000
Great Orme Country Park	-	-	-	210,008
Great Orme Tramway	196,920	208,850	205,495	191,613
Greenfield Valley Museum and Heritage Park	-	-	-	13,000
Greenwood Forest Park	142,119	-	-	150,000
Gregynog Hall	-	-	850	1,800
Gwydir Forest Park	235,816	-	317,405	352,723
Gypsy Wood Park	-	-	-	44,000
Harlech Beach	-	-	-	134,914
Harlech Castle	89,038	98,877	116,216	108,981
Holyhead Maritime Museum	-	-	4,149	4,861
Home Front Experience (The)	-	-	-	10,000
Howell Harris Museum	-	2,100	350	2,100
Inigo Jones Slate Works	-	-	40,000	38,000
John Street Gallery	-	-	-	257
Joseph Parry's Ironworkers Cottage Museum	-	-	-	441
Kidwelly Castle	31,686	31,852	39,344	34,519
King Arthur's Labyrinth	-	30,442	-	33,400
Kymin (The)	-	5,908	5,938	5,789
Lake Vyrnwy Nature Reserve	14,923	150,000	-	190,000
Lampeter Museum	-	1,086	926	848
Last Invasion Tapestry (The)	-	16,726	20,000	12,186
Laugharne Castle	12,209	12,859	13,779	14,619
LC Waterpark and Leisure Complex	803,498	784,522	796,149	772,000
Llancaiach Fawr Manor	64,907	56,218	-	53,661
Llandaff Cathedral	-	-	-	500
Llandegfedd Visitor Centre	-	1,040	175,400	188,720
Llanerchaeron	43,054	45,795	48,873	48,354
Llanfair Slate Caverns	-	-	-	24,000
Llangollen Railway	-	-	100,000	98,000
Llanyrafon Mill	-	293	404	364
Lloyd George Museum	-	-	-	5,298
Llyn Alwen / Brenig	33,936	124,744	50,305	124,256
Llyn Brenig Visitor Centre	-	-	-	144,180
Llyn Mair	-	-	13,332	19,996

Name	2015	2016	2017	2018
Llyn Padarn & Padarn Country Park	-	108,557	136,550	139,143
Manor House Wildlife Park	-	-	78,562	76,517
Menai Bridge Community Heritage Trust	-	2,335	-	3,500
Merthyr Mawr Warren National Nature Reserve	-	-	86,002	71,317
Milford Haven Heritage & Maritime Museum	-	-	-	2,589
Moel Famau Forest	71,931	-	84,937	86,086
Mold Library Museum & Art Gallery	-	-	-	158,441
MOMA Machynlleth	21,354	21,292	-	22,986
Monty's Brewery Visitor Centre	-	-	7,366	8,540
Morfa Dyffryn	-	-	60,215	77,303
Museum of Speed	-	-	15,956	14,958
Nant Gwrtheyrn Hall	-	-	-	45,000
Nant yr Arian	-	-	-	111,826
Nantclwyd-Y-Dre	-	-	2,266	2,230
Narrow Gauge Railway Museum	17,884	-	16,757	18,208
National Botanic Garden of Wales (The)	-	-	-	161,129
National Coracle Centre & Flour Mill	-	3,209	2,779	2,270
National Museum Cardiff	472,544	509,981	539,550	488,809
National Roman Legion Museum	70,695	69,926	70,021	54,264
National Slate Museum	140,828	122,007	145,969	141,762
National Trust Stackpole	-	-	-	40,549
National Waterfront Museum	257,617	265,235	268,622	285,340
National Wetland Centre Wales (Llanelli Wetland Centre)	-	-	-	68,460
National Wool Museum	33,653	26,394	36,909	31,383
Newborough National Nature Reserve & Forest	319,320	492,259	449,771	478,204
Newport Cathedral (St Woolos)	-	-	2,754	4,500
Newport Museum & Art Gallery	28,562	-	-	31,902
Newport Transporter Bridge	-	-	-	16,354
Newport Wetlands	-	-	-	89,516
Newport Wetlands Nature Reserve	104,067	109,323	114,887	110,432
Newton House, Dinefwr Park & Castle	64,705	76,258	87,994	82,370
Newtown Textile Museum	74	405	1,061	1,422
North Wales Bowls Centre (The)	-	-	34,500	24,808
Nova Prestatyn	-	-	-	250,000
Oakwood Theme Park	-	-	-	110,000
Ocean Lab	-	1,646	3,970	4,436
Old Station Tintern	130,254	140,600	115,000	25,175
Oriel Plas Glyn-Y-Weddw Arts Centre	-	-	126,567	143,478
Oriel Y Parc	135,152	142,000	136,000	126,000
Oriel Ynys Mon	-	89,756	-	81,812
Oxwich Castle	6,336	6,587	6,233	5,999
Oxwich National Nature Reserve	-	-	12,060	12,391
Parc Howard Museum	-	-	12,281	10,568
Pembrey Country Park	343,811	491,641	470,000	520,000

Name	2015	2016	2017	2018
Pembroke Dock Heritage Centre	-	7,350	8,081	8,396
Penrhyn Castle	111,948	115,561	110,820	118,833
Picton Castle & Woodland Gardens	-	31,450	32,968	38,680
Plas Mawr	23,658	24,542	26,904	31,561
Plas Newydd	128,536	146,528	143,206	151,714
Plas yn Rhiw	17,296	17,285	8,637	20,519
Playbarn (The)	-	-	29,902	28,500
Pontcysyllte Aqueduct	-	45,221	333,363	342,620
Pontypridd Museum	21,873	8,948	8,882	22,195
Porth y Swnt	13,767	12,893	14,591	13,428
Porthcawl Museum	5,217	-	9,245	7,589
Powis Castle & Garden	156,921	154,828	145,325	155,805
Principality Stadium Tours	-	-	-	48,337
Quackers Play Centre	-	30,000	28,000	22,000
Quarry Hospital Visitor Centre	-	17,547	18,487	16,299
Raglan Castle	66,058	67,497	67,046	64,475
Ramsey Island Nature Reserve	2,432	3,477	-	4,500
Regimental Museum of The Royal Welsh (Brecon)	11,943	10,684	8,599	10,217
Rhiw Valley Light Railway	-	562	500	500
Rhondda Heritage Park	-	31,374	-	44,970
Rhossili, Worm's Head & Visitor Centre	-	-	-	67,579
Rhuddlan Castle	25,872	26,906	22,532	22,784
Rhyl Library, Museum and Arts Centre	-	-	-	118,122
Ribride	-	9,514	15,000	15,861
Robert Owen Memorial Museum	-	1,140	-	2,000
Royal Mint Experience (The)	-	52,859	93,850	75,000
Rug Chapel	2,674	2,744	2,108	1,342
Ruthin Craft Centre Gallery	-	65,484	68,272	69,232
Saundersfoot Harbour	-	-	-	80,000
Secret Owl Garden (The)	-	-	-	20,000
Snowdon Mountain Railway	132,252	117,077	130,266	140,000
South Stack Cliffs Nature Reserve	113,950	115,269	121,197	117,989
South Wales Miners Museum	-	-	1,000	1,000
St David's Bishop Palace	24,308	24,947	26,802	25,412
St David's Cathedral	275,700	271,700	287,000	272,000
St Fagan's National Museum of History	531,231	504,402	553,090	636,859
St Winefride's Well	-	28,995	-	32,236
Stackpole	-	-	-	298,496
Stackpole Gardens & Visitor Centre	-	25,494	25,289	23,666
Strata Florida Abbey	5,280	5,380	5,550	7,232
Surf Snowdonia	-	-	180,000	140,000
Swansea Community Boat "Copper Jack"	-	12,000	6,000	6,429
Talacre	102,563	116,941	128,671	142,393
Techniquest	-	190,000	189,000	153,500
Techniquest Glyndwr	-	-	73,025	72,533

Name	2015	2016	2017	2018
The National Showcaves Centre for Wales	-	88,805	-	88,162
Thomas Shop & Museum (The)	-	-	-	2,500
Tintern Abbey	70,808	71,360	74,497	74,613
Tir Prince Fun Park	-	-	-	900,000
Tredegar House	90,584	94,091	89,194	80,547
Tregaron (Cors Caron)	-	-	-	42,131
Tretower Court & Castle	13,587	13,849	14,704	13,274
Tudor Merchant's House	24,658	24,044	25,185	25,066
Tŷ Halen, Anglesey Saltcote	-	18,758	18,965	22,687
Tŷ Mawr Wybrnant	5,577	5,350	4,015	3,794
University of South Wales Art Collection Museum	-	-	-	2,100
Vale of Rheidol Railway	-	-	-	60,000
Valle Crucis Abbey	7,355	7,626	6,395	5,690
Van Road Caerphilly	-	-	6,437	17,132
Voyages of Discovery	-	13,000	-	20,000
Wales Millennium Centre	1,010,400	1,264,458	1,082,494	1,762,281
Walkers on Snowdon ²³	449,657	465,000	654,077	650,000
Welsh Mountain Zoo and Botanical Gardens	162,116	161,602	151,152	159,522
Welsh Wildlife Centre	-	-	-	80,000
Welshpool & Llanfair Light Railway	-	26,875	35,000	35,000
White Castle Vineyard	7,682	-	1,500	1,000
Workhouse History Centre	-	1,550	2,850	2,400
Wrexham County Borough Museum	32,104	36,422	45,626	34,412
Xcel Bowl	-	230,000	133,000	55,000
Ynys-hir Nature Reserve	14,226	14,229	-	15,901
Ynyslas	-	-	119,541	70,855
Yr Ysgwrn	-	-	-	8,237
Zip World Forest	-	-	115,528	195,000
Zip World Penrhyn Quarry	-	-	89,155	122,000
Zip World Slate Caverns	-	-	190,000	195,000

²³ Attraction name and categorisation changed in 2018 – previously Walkers on Snowdon had been grouped with visitors to Snowdon Mountain Railway and visits reported jointly as Snowdon Summit Visitor Centre. Snowdon Mountain Railway has now been split from Walkers on Snowdon for reporting.

APPENDIX III

Top Ten Attractions by Region 2018

Top ten attractions SE Wales 2018

	Name	Paid / Free	Category	Owner	No. of visits 2018 ²⁴
1	Wales Millennium Centre	Free	MAG	PO	1,762,281*
2	St Fagans National Museum of History	Free	MAG	AC-NMW	636,859
3	National Museum Cardiff	Free	MAG	AC-NMW	488,809
4	Cardiff Castle	Paid	HP	LA/NP	452,007
5	Cosmeston Lakes Country Park	Free	CP	LA/NP	250,000*
6	Llandegfedd Visitor Centre	Free	WL	PO	188,720*
7	Cwmcarn Forest	Free	CP	NRW	182,946*
8	Techniquest	Paid	SC/T	PO	153,500*
9	Big Pit National Coal Museum	Free	MAG	AC-NMW	146,791
10	Dyffryn Gardens	Paid	CP	NT	141,261

Top ten attractions SW Wales 2018

	Name	Paid / Free	Category	Owner	No. of visits 2018
1	LC Waterpark & Leisure Complex	Paid	THEME	PO	772,000
2	Pembrey Country Park	Free	CP	LA/NP	520,000*
3	Folly Farm	Paid	FARM	PO	455,428
4	Stackpole National Nature Reserve	Free	WL	NRW	298,496*
5	National Waterfront Museum	Free	MAG	AC-NMW	285,340
6	St David's Cathedral	Free	HP	PO	272,000*
7	Afan Argoed Forest Park	Free	WL	NRW	193,997*
8	National Botanic Garden of Wales	Paid	CP	PO	161,129
9	Oriel y Parc	Free	IND	LA/NP	126,000
10	Oakwood Theme Park	Paid	THEME	PO	110,000*

²⁴ Estimated visit figures supplied by operators are indicated with an asterisk *

Top ten attractions Mid Wales 2018

	Name	Paid / Free	Category	Owner	No. of visits 2018
1	Aberystwyth Arts Centre	Free	MAG	PO	600,000*
2	Elan Valley Visitor Centre	Free	WL	DCWW	202,418*
3	RSPB Lake Vyrnwy	Free	WL	RSPB	190,000*
4	Powis Castle & Garden	Paid	HP	NT	155,805
5	Nant yr Arian	Free	WL	NRW	111,826*
6	Aberystwyth Cliff Electric Railway	Paid	R/T	PO	80,000*
7	Ynyslas National Nature Reserve	Free	WL	NRW	70,855*
8	Amgueddfa Ceredigion Museum	Free	MAG	LA/NP	69,553
9	Coedydd Aber National Nature Reserve	Free	WL	NRW	65,602*
10	Vale of Rheidol Railway	Paid	R/T	PO	60,000*

Top ten attractions North Wales 2018

	Name	Paid / Free	Category	Owner	No. of visits 2018
1	Tir Prince Fun Park, Raceway & Market	Free	THEME	PO	900,000*
2	Walkers on Snowdon ²⁵	Free	WL	LA/NP	650,000*
3	Newborough National Nature Reserve & Forest	Free	WL	NRW	478,204*
4	Gwydir Forest Park	Free	WL	NRW	352,723*
5	Poncysyllte Aqueduct & Trevor Basin Visitor Centre	Free	HP	PO	342,620
6	Bodnant Garden	Paid	CP	NT	260,153
7	Nova Prestatyn	Paid	THEME	LA/NP	250,000*
8	Great Orme Country Park Visitor Centre	Free	CP	LA/NP	210,008
9	Caernarfon Castle	Paid	HP	Cadw	205,009
10	Conwy Castle	Paid	HP	Cadw	201,961

²⁵ Attraction name and categorisation changed in 2018 – previously Walkers on Snowdon had been grouped with visitors to Snowdon Mountain Railway and visits reported jointly as Snowdon Summit Visitor Centre. Snowdon Mountain Railway has now been split from Walkers on Snowdon for reporting.