

**VISITS TO TOURIST ATTRACTIONS
2009**

REPORT FOR VISIT WALES



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A GUIDE TO READING THE TABLES

Confidentiality

Visits figures are not published in the report if the tourist attraction operator / respondent specifically indicated that their figures should remain confidential.

Estimates/ Visits figures unavailable

- If visits figures were estimated by operators, this is indicated with an asterisk (*) following the number of visits in the tables in 2009, at the end of the report. If an attraction has estimated figures in 2009 it is assumed figures for previous years are also based on estimates, and vice versa.
- If the attraction was not yet open to the public, so that no visits figures were available, then 'not open' replaces the visits figures
- If the attraction was closed temporarily due to refurbishment, renovation etc. then 'closed' replaces the visits figures

Admission

In the lists of tables, admission to the attraction is included in the column entitled 'entry'.

- If an attraction has an admission charge, the adult admission charge for high season 2009 is indicated. If this is not known the charge is left blank.

Abbreviations

Regions

M	Mid Wales
N	North Wales
SE	South East Wales
SW	South West Wales

Ownership categories

Cadw [†]	Cadw	(Welsh Historic Monuments)
G	Government	(Government Agency/ Branch e.g. National Parks Authority, Education, National Museums and Galleries of Wales etc)
LA	Local Authority	
NT [†]	National Trust	
PO	Privately Owned	(Private individual owners, organisation/ trust etc)

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

Tourist attraction categories

HP	Historic Properties	Castles, Forts, Historic Houses, Palaces, Historic Monuments, Archaeological Sites, Other Historic Properties, Heritage Centres, Places of Worship
Theme	Leisure, Theme Parks	Leisure Parks, Theme Parks
MAG	Museums and/ or Art Galleries	Museums, Art Galleries, Science Centres, Technology Centres
Ind	Industrial/ craft attraction	
CP	Country Park, garden, other natural	
WL	Wildlife attraction	
R/T	Railway/ tramway	

Employee Abbreviations

FTP	Full time permanent
PTP	Part time permanent
FTS	Full time seasonal
PTS	Part time seasonal
UV	Unpaid volunteer
UVP	Unpaid volunteer permanent
UVS	Unpaid volunteer seasonal

Throughout the report, samples of ten or below are marked with an asterisk (*) to denote the need for caution to be applied when looking at the results.

EXECUTIVE SUMMARY

- Amongst those attractions responding in both 2008 and 2009 visits to attractions in 2009 stood at 12,762,023: a 10.5% increase since 2008.
- Perhaps not surprisingly given the economic climate, visits to free admittance attractions increased by the highest proportion: up by 16.6% between 2008 and 2009 (and up by 20.2% between 2007 and 2009). Meanwhile visits to paid attractions increased by a lower proportion (9.7% between 2008 and 2009, and 1.9% between 2007 and 2009).
- The South West experienced the largest increase in visits to its attractions: up 27.6% between 2008 and 2009, while the South East remained fairly static in terms of visitor numbers: experiencing a decrease of just 0.02% between the two years.
- Adults make up just over 72% of all visits with children making up nearly 28% of all visits: highest in themed attractions (nearly 38%) and lowest in historical property attractions (nearly 26%).
- The average adult admission charge for attractions in Wales amongst those attractions who responded in both 2009 and 2008 stands at £5.38 in 2009 (a rise of 8.9% from 2008). For children the average admission charge is £3.14 (a rise of 8.3% from 2008).
- Gross revenue movement was up for 44% of attractions (an improvement on 2008 where only 30% experience a positive movement in gross revenue).
- Looking at average revenue per visitor the figure was highest for wildlife attractions (£11.68 per visitor) and lowest for museums and art galleries (£2.20 per visitor).
- Looking regionally at average revenue per visitor, attractions in the South East – which has the greatest volume of free-admission attractions – have the lowest average revenue (£2.97) and those in the North have the highest average revenue (£7.53).
- Nearly 44% of all employment (classed as paid and unpaid employment) is as an unpaid seasonal volunteer. Full time permanent employment accounts for just over 16% of all employees.
- The majority of attractions did not experience problems in recruiting or retaining staff in 2009.
- Of the attractions responding to the question about offering the Welsh language (either as a tour or in information) nearly 93% currently offer Welsh with just over 93% planning to offer Welsh in 2010.
- Nearly two thirds of attractions (63%) carried out an improvement or upgrade to their attraction in 2009 with over half falling into the £0 - £4,999 category.

1. INTRODUCTION AND OBJECTIVES

1.1 Background

Visit Wales (VW) have been conducting the Survey of Visits to Tourist Attractions since 1973. The remits of the research are 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 of Visits to Tourist Attractions including visit figures, operations, funding, revenue, marketing and human resources
- analyse data according to attraction categories, the four economic regions of Wales, and admission charging policy.

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.”

1.3 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 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, cafes 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.

2. METHODOLOGY

2.1 Conducting the research

The research took place in two stages, depending on whether the attraction had seasonal opening times (early) or was open throughout the duration of the year (late). For early attractions the mailout was October 2009, with a reminder two weeks after mailout for non-responders. For late attractions, the mailout took place in January 2010, with reminders sent out two weeks after mailout for non-responders.

The survey materials were sent out in the language/s of choice in either an email or postal format. If postal research was asked for the respondent had a pre-paid envelope which they could use to return the completed survey.

The final returns from the above fieldwork were received in February, with data entry of the responses taking place after this point.

The questionnaire was based on that which has been used in previous years to ensure comparability and the ability to monitor trend data.

2.2 Survey distribution and response rate

The survey was distributed to a total of 525 attractions believed to fit the tourist attraction definition. The response rates for this year and previous two years are given in Table 2.1 below:

Table 2.1 Response rate

	2009 Actual (percentage)	2008 Actual (percentage)	2007 Actual (percentage)
Total number of mailable attractions	525	517	519
Attractions completing survey and providing visitor figures in that year	239 (46%)	235 (45%)	243 (47%)
Attractions not able to give visitor figures	27 (5%)	24 (5%)	9 (2%)
Attractions not wishing to participate	-	-	20 (4%)
Attractions closed (included in 27 above)	(included in 27 above)	(included in 24 above)	31 (6%)
TOTAL RESPONSE RATE	267 (51%)	259 (50%)	304 (59%)

Thus, while the response to the survey this year was 51% - the proportion actually providing visitor figures stands at 46%.

Furthermore, in order to ascertain the reliability of visits figures provided, in 2009 a total of 162 operators indicated which methods they used to calculate their visits figures. Results are shown in Table 2.2 below. Some operators use more than one method by which to calculate visitor numbers and therefore the percentages do not add up to 100.

Table 2.2 Visitor recording method

	Actual numbers	%
Total sample	162	
Ticket sales and/or group booking sales	65	40%
Mechanical or electronic method of counting	25	15%
Manual method of counting numbers	57	35%
Estimate made on the basis of sample count	19	12%
Sample count	9**	6%
Other*	11	7%

*Other methods of recording visitor numbers include visitor books, pebbles in bowls and takings per day.

** caution: low base

3. Comparative Analysis of Visits to Tourist Attractions 2009/8 and 2009/7

This chapter analyses trends in the number of visits to attractions in Wales. It looks at those attractions that responded in both 2009 and 2008, as well as those attractions that responded in 2009 and 2007. Please note the base sizes will vary between the two as not all attractions responded across the three years.

3.1 Overall comparisons

Table 3.1 Comparison of overall yearly visits 2009/8 and 2009/7

In both 2009 and 2008 a total of 179 attractions provided total visits figures. In the years 2009 and 2007 127 attractions provided total visits figures.

2009/8				2009/7			
Sample	Visits 2009	Visits 2008	Increase/decrease	Sample	Visits 2009	Visits 2007	Increase/decrease
179	12,762,023	11,551,839	+10.5%	127	9,744,939	8,812,834	+10.6%

Between 2008 and 2009 visits to attractions (in matched samples) increased by nearly 11% to 12,762,023. Between 2007 and 2009 the increase (again in matched samples) was just under 11% (9,744,939).

Table 3.2 Comparison of yearly visits 2009/8 and 2009/7 for free and paid attractions

2009/8				2009/7			
Sample	Visits 2009	Visits 2008	Increase/decrease	Sample	Visits 2009	Visits 2007	Increase/decrease
Free				Free			
52	5,294,749	4,539,367	+16.6%	36	4,567,929	3,800,874	+20.2%
Paid				Paid			
100	5,982,328	5,454,976	+9.7%	78	4,267,129	4,188,867	+1.9%
Total				Total			
152	11,277,077	9,994,343	+12.8%	114	8,835,058	7,989,741	+10.6%

Between 2008 and 2009 free attractions exhibited the largest increase in visitor numbers, up nearly 17% to 5,294,749. This compares to paid attractions which rose by nearly 10% to 5,982,328. The same pattern can be seen between 2009 and 2007 samples, with free attractions showing a larger increase in visitor numbers: but for this matched sample set the increase was just over 20% compared to for paid attractions (nearly 2%).

Table 3.3 Comparison of yearly visits 2009/8 and 2009/7 by region in Wales

2009/8					2009/7				
		Visits 2009	Visits 2008	Increase/ decrease			Visits 2009	Visits 2007	Increase/ decrease
Sample					Sample				
Mid	29	879,014	833,286	+5.5%	Mid	21	718,061	724,607	-0.9%
North	57	3,037,812	2,860,765	+6.2%	North	37	2,484,849	2,289,552	+8.5%
S East	42	4,248,795	4,256,166	-0.2%	S East	36	4,051,111	3,858,969	+4.9%
S West	51	4,596,402	3,601,622	+27.6%	S West	33	2,490,918	1,939,706	+28.4%
Total	179	12,762,023	11,551,839	+10.5%	Total	127	9,744,939	8,812,834	+10.6%

Looking at the regions of Wales it is the South West that exhibits the largest increase in visitor numbers between 2009 and preceding years: up nearly 28% on 2008 and just over 28% on 2007 visitor numbers. Conversely visitor numbers have declined – marginally – in South East Wales, down just 0.02%.

Table 3.4 Comparison of yearly visits 2009/8 and 2009/7 by category

2009/8					2009/7				
		Visits 2009	Visits 2008	Increase/ decrease			Visits 2009	Visits 2007	Increase/ decrease
Sample					Sample				
Historic properties	58	2,638,935	2,501,394	+5.5%	48	2,554,599	2,576,784	-0.9%	
Museum/ art gallery	55	4,137,014	3,925,380	+5.4%	40	3,718,450	3,483,294	+6.8%	
Industrial/ craft attraction	15	638,508	683,578	-6.6%	9*	582,640	604,907	-3.7%	
Country park, garden, other natural	29	3,529,461	2,831,836	+24.6%	14	1,849,702	1,333,738	+38.7%	
Wildlife attraction	7*	269,337	287,090	-6.2%	4*	147,404	141,574	+4.1%	
Themed attraction, leisure park/ centre	3*	710,758	617,112	+15.2%	1*	92,897	112,899	-17.7%	
Railway/ tramway	11	830,715	697,831	+19.0%	10*	791,952	549,638	+44.1%	
Total	178	12,754,728	11,544,221	+10.5%	Total	126	9,737,644	8,802,834	+10.6%

*caution: low base

Visitor numbers are also broken down by the category of attraction, above, which shows that the largest increase in visitor numbers is for country parks, gardens and other nature-based attractions: up nearly 25% since 2008 with visitor numbers at 3,529,461 in 2009. This type of attraction enjoyed the second highest volume of visits in 2009: the most visited type of attraction was museum/ art galleries with 4,137,014 visitors (up just over 5% on 2008).

Table 3.5 Comparison of yearly visits 2009/8 and 2009/7 by ownership

		2009/8			2009/7			
		Visits 2009	Visits 2008	Increase/ decrease	Sample	Visits 2009	Visits 2007	Increase/ decrease
Cadw	28	1,225,155	1,094,341	+12.0%	27	1,216,415	1,197,272	+1.6%
National Museum of Wales	7*	1,652,459	1,549,071	+6.7%	7*	1,652,459	1,613,740	+2.4%
Local Authority	59	4,267,355	3,554,115	+20.1%	33	2,563,368	1,920,278	+33.5%
The National Trust	18	945,579	933,257	+1.3%	12	856,744	899,926	-4.8%
Private Owner/ Trust	67	4,671,475	4,421,055	+5.7%	48	3,455,953	3,181,618	+8.6%
Total	179	12,762,023	11,551,839	+10.5%	127	9,744,939	8,812,834	+10.6%

*caution: low base

Properties under the ownership of Local Authorities have exhibited the largest increase in visitor numbers in 2009: up just over 20% between 2008 and 2009 and over 33% between 2007 and 2009. This ownership group accounts for the second largest volume of attractions: 59 fell under Local Authority responsibility in 2009, behind those managed by private owners/ trust which accounted for 67 attractions.

Table 3.6 Comparison of yearly visits 2009/8 and 2009/7 by geographic location

		2009/8			2009/7			
		Visits 2009	Visits 2008	Increase/ decrease	Sample	Visits 2009	Visits 2009	Increase/ decrease
Coastal	25	1,673,813	1,546,314	+8.2%	21	1,588,300	1,463,423	+8.5%
Rural	101	5,324,323	4,509,209	+18.1%	74	4,194,768	3,538,777	+18.5%
Urban	53	5,763,887	5,496,316	+4.9%	32	3,961,871	3,810,634	+4.0%
Total	179	12,762,023	11,551,839	+10.5%	127	9,744,939	8,812,834	+10.6%

Attractions in rural locations exhibited the largest increase in visitor numbers between 2008 and 2009 (up just over 18%) while those in coastal locations (8.2%) and urban locations (5.9%) exhibited slightly lower increases.

3.2 Comparison of monthly visits 2009/8 and 2009/7

146 visitor attractions provided a monthly breakdown of visits to their operation for both years 2009 and 2008, while 97 provided a breakdown for 2009 and 2007.

Table 3.7 Monthly distribution of visits 2009/8 and 2009/7

	2009/8		2009/7			
	Sample	Visits 2009	Visits 2008	Sample	Visits 2009	Visits 2007
January	146	3.9%	3.6%	97	3.3%	3.6%
February		5.0%	5.2%		4.8%	4.9%
March		6.0%	7.6%		6.0%	5.6%
April		10.7%	9.7%		10.4%	10.9%
May		11.6%	10.7%		12.0%	10.0%
June		9.4%	9.3%		9.7%	9.7%
July		12.6%	12.6%		13.0%	12.8%
August		16.3%	15.9%		17.0%	17.0%
September		8.6%	8.5%		8.6%	8.6%
October		8.4%	7.4%		8.2%	7.9%
November		3.9%	4.4%		3.7%	4.9%
December		3.7%	5.0%		3.4%	4.2%

The peak summer months of July and August accounted for 28.9% of visits to attractions in 2009 – a figure on a par with 2008 (28.5%). In 2009 the months in which attractions experienced the lowest volume of visits in 2009 were November (3.9% of visits took place in this month), December (3.7%) and January (3.9%).

Table 3.8 Monthly distribution of visits 2009/8 and 2009/7 by admission

	2009/8				2009/7				
	Sample	Free		Paid		Free		Paid	
		2009	2008	2009	2008	2009	2007	2009	2007
		45		81		30		59	
January		4.9%	4.9%	2.8%	2.1%	4.5%	5.0%	1.9%	1.9%
February		6.1%	6.9%	4.0%	3.6%	6.0%	6.3%	3.1%	2.9%
March		7.4%	8.6%	4.9%	7.1%	7.4%	7.0%	4.4%	3.9%
April		9.7%	8.1%	10.9%	8.5%	9.7%	10.4%	11.1%	11.7%
May		12.1%	10.4%	11.4%	11.7%	12.6%	9.8%	11.8%	10.2%
June		9.4%	9.1%	9.7%	10.1%	9.3%	8.9%	10.2%	10.7%
July		11.6%	12.0%	13.6%	14.0%	11.8%	11.5%	14.1%	14.2%
August		14.0%	14.0%	18.7%	18.8%	14.1%	13.2%	19.8%	21.2%
September		8.3%	8.1%	9.3%	8.8%	8.2%	7.9%	9.5%	9.7%
October		8.3%	7.6%	8.0%	7.6%	8.3%	8.1%	8.0%	7.6%
November		4.7%	5.4%	3.1%	3.6%	4.6%	6.6%	2.6%	3.0%
December		3.6%	4.8%	3.5%	4.1%	3.4%	5.1%	3.4%	3.2%

The table above looks at the distribution of monthly visits by free and paid attractions. It shows that free attractions appear to have slightly more of a year-round appeal with visitor numbers to paid attractions more likely to peak during the summer months of July and August: in free attractions in 2009 25.6% of visits were made in July and August, compared to 32.3% in paid attractions.

3.3 Comparison of quarterly visits 2009/8 and 2009/7

Table 3.9 Quarterly distribution of visits 2009/8 and 2009/7

2009/8			2009/7		
	Visits 2009	Visits 2008		Visits 2009	Visits 2007
Sample	146		Sample	97	
Jan – Mar	14.8%	16.5%		14.1%	14.1%
Apr – Jun	31.7%	29.7%		32.2%	30.6%
Jul – Sep	37.5%	37.1%		38.5%	38.3%
Oct - Dec	16.0%	16.7%		15.2%	17.0%

In 2009 nearly 15% of visits to attractions in Wales were made between January and March, nearly 32% between April and June with the peak – nearly 38% – between July and September. The remaining quarter (October to December) experienced 16% of visits.

Table 3.10 Quarterly distribution of visits 2009/8 by region

Region	Sample	Distribution of visits 2009				Distribution of visits 2008				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 08
Mid Wales	22	5.1%	29.9%	53.3%	11.7%	8.2%	28.5%	51.3%	12.0%	479,042	435,446
North Wales	42	8.4%	32.1%	46.9%	12.7%	11.2%	29.0%	46.6%	13.3%	2,249,327	1,933,798
SE Wales	40	17.3%	31.7%	34.2%	16.9%	20.2%	28.4%	33.8%	17.6%	4,236,702	4,225,737
SW Wales	42	17.1%	31.8%	33.6%	17.5%	15.5%	32.3%	33.8%	18.5%	3,495,040	2,952,551
Total	146	14.8%	31.7%	37.5%	16.0%	16.5%	29.7%	37.1%	16.7%	10,460,111	9,547,532

Attractions in South East and South West Wales show a more even spread of visits across the year compared to attractions in North and Mid Wales. In the peak summer months of July to September attractions in Mid Wales had 53.3% of their visits, compared to 33.6% amongst attractions in South West Wales.

Table 3.11 Quarterly distribution of visits 2009/7 by region

Region	Sample	Distribution of visits 2009				Distribution of visits 2007				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 07
Mid Wales	15	7.3%	29.4%	51.3%	11.9%	7.0%	30.2%	50.6%	12.2%	338,737	359,621
North Wales	24	5.6%	32.5%	49.5%	12.4%	5.6%	33.3%	49.2%	11.9%	1,528,947	1,436,911
SE Wales	34	17.7%	31.9%	33.8%	16.5%	17.9%	29.4%	33.0%	19.7%	4,038,352	3,890,934
SW Wales	24	14.3%	33.1%	37.1%	15.4%	13.9%	31.1%	39.1%	15.8%	1,468,620	1,187,572
Total	97	14.1%	32.2%	38.5%	15.2%	14.1%	30.6%	38.3%	17.0%	7,374,656	6,875,038

The quarterly distribution of visits by region between 2007 and 2009 shows a fairly similar pattern with just over 38% of visits to attractions taking place between July and September in both years.

Table 3.12 Quarterly distribution of visits 2009/8 by category

Category	Sample	Distribution of visits 2009				Distribution of visits 2008				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 08
Historic property	49	10.3%	32.5%	42.8%	14.4%	14.5%	30.5%	41.6%	13.4%	2,220,147	2,039,199
Museum or art gallery	47	18.5%	30.4%	34.3%	16.8%	21.0%	26.6%	34.1%	18.3%	3,650,175	3,477,760
Industrial or craft attr.	10*	11.4%	30.2%	45.0%	13.4%	13.1%	27.0%	46.8%	13.2%	407,460	431,071
Country park, garden, other natural	21	16.2%	34.7%	31.8%	17.3%	16.2%	34.8%	30.6%	18.3%	2,541,742	2,298,386
Wildlife attr.	6*	9.4%	30.5%	48.0%	12.1%	15.5%	28.9%	38.5%	17.0%	252,493	184,356
Themed attr., leisure parks & centres	3*	19.8%	27.4%	35.1%	17.7%	8.5%	26.7%	45.9%	19.0%	710,758	617,112
Railway or tramway	10*	3.3%	31.4%	52.7%	12.6%	6.6%	31.1%	49.8%	12.4%	677,336	499,648
Total	146	14.8%	31.7%	37.5%	16.0%	16.5%	29.7%	37.1%	16.7%	10,460,111	9,547,532

*caution: low base

The attractions that exhibit the highest peak of visits during the period July – September are railways and tramways with 52.7% of visits taking place within these months in 2009 (higher than in 2008 when visits accounted for 49.8% of the total visits). In 2009 the percentage-range for railways (i.e. between the quietest and busiest months for visitors) was 49.4 percentage points.

Conversely, museums and art galleries enjoyed a more even year-round volume of visits: ranging from 16.8% in October – December to a peak of 34.3% in July and September (a range of 17.5 percentage points).

Table 3.13 Quarterly distribution of visits 2009/7 by category

Category	Sample	Distribution of visits 2009				Distribution of visits 2007				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 07
Historic property	42	10.5%	32.4%	42.6%	14.5%	9.8%	31.8%	43.8%	14.6%	2,166,263	2,160,917
Museum or art gallery	31	18.7%	31.0%	33.8%	16.5%	19.6%	28.7%	31.5%	20.2%	3,261,018	3,018,431
Industrial or craft attr.	7*	11.7%	30.2%	44.5	13.6%	11.1%	30.9%	44.3%	13.7%	389,283	419,161
Country park, garden, other natural	7*	14.1%	36.5%	34.7%	14.7%	14.2%	32.9%	37.6%	15.4%	953,993	713,773
Wildlife attr.	3*	14.0%	32.6%	39.5%	13.9%	9.6%	30.8%	38.4%	21.2%	130,560	77,192
Themed attr., leisure parks & centres	1**	-	-	-	-	-	-	-	-	-	-
Railway or tramway	6*	2.7%	30.9%	51.8%	14.5%	2.4%	32.2%	50.7%	14.6%	425,642	372,665
Total	97	14.1%	32.2%	38.5%	15.2%	14.1%	30.6%	38.3%	17.0%	7,374,656	6,875,038

*caution: low base

**Sample size too small and would breach confidentiality

The pattern of visits shown in table 3.13 closely mirrors that in 3.12 with museums and art galleries showing a more even year-round pattern of visits compared to railways and tramways.

Table 3.14 Quarterly distribution of visits 2009/8 by geographic location

Category	Sample	Distribution of visits 2009				Distribution of visits 2008				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 08
Coastal	16	11.0%	32.6%	44.0%	12.5%	14.0%	30.0%	43.1%	12.9%	1,264,873	1,104,579
Rural	81	10.4%	32.6%	42.9%	14.1%	13.2%	31.0%	41.2%	14.6%	3,666,007	3,182,570
Urban	49	18.6%	31.0%	32.4%	18.0%	18.9%	28.9%	33.3%	18.9%	5,529,231	5,260,383
Total	146	14.8%	31.7%	37.5%	16.0%	16.5%	29.7%	37.1%	16.7%	10,460,111	9,547,532

Attractions in urban locations demonstrate a more even year-round pattern of visits with a percentage-point difference between the peak and lowest period of 14.4 percentage points in 2009. This compares to coastal attractions which have a net percentage point difference of 33 point between the peak and lowest months of visits.

Table 3.15 Quarterly distribution of visits 2009/7 by geographic location

Category	Sample	Distribution of visits 2009				Distribution of visits 2007				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 09	Jan – Dec 07
Coastal	12	11.7%	32.8%	42.7%	12.8%	11.0%	31.8%	44.7%	12.5%	1,175,352	1,155,885
Rural	57	8.8%	32.9%	44.3%	14.0%	8.1%	32.8%	44.2%	15.0%	2,472,090	2,078,124
Urban	28	18.3%	31.5%	33.4%	16.8%	18.5%	28.9%	33.0%	19.6%	3,727,214	3,641,029
Total	97	14.1%	32.2%	38.5%	15.2%	14.1%	30.6%	38.3%	17.0%	7,374,656	6,875,038

The pattern between 2007 and 2009 is similar to that of 2008 and 2009 in the previous table. In 2009 there were slightly greater proportions of visitors during the April to June period (32.2%) compared to in 2007 (30.6%).

3.4 Comparison of admission charges for paid attractions

Table 3.16 Comparison of adult and child average charges (per attraction) 2009/8 and 2009/7

	2009/8			2009/7		
	2009	2008	Increase/decrease	2009	2007	Increase/decrease
Sample		96		Sample	72	
Average adult admission charge	£5.38	£4.94	+8.9%	£5.09	£4.63	+9.9%
Average child admission charge	£3.14	£2.90	+8.3%	£3.13	£2.76	+13.4%

In both 2009 and 2008 96 attractions gave their adult and child entry fee, with 72 attractions doing so in both 2007 and 2009. As can be seen in the above table the average adult entry fee rose by nearly 9% between 2008 and 2009 and nearly 10% between 2007 and 2009.

For children the average entry fee rose just over 8% between 2008 and 2009 and over 13% between 2007 and 2009.

Table 3.17 Comparison of adult and child average charges (per attraction) 2009/8/7

	2009	2008	2007	2008-9	2007-8
Sample		69			
Average adult admission charge	£5.05	£4.82	£4.60	+6.8%	+4.8%
Average child admission charge	£3.22	£2.96	£2.74	+8.8%	+8.0%

69 attractions gave their adult and child entry fees in 2009, 2008 and 2007 and these are shown in the table above: amongst this sample between 2008 and 2009 adult admission rose nearly 7% and child admission by nearly 9%.

Table 3.18 Distribution of adult admission charges by range

	Sample not common			Sample common		
	2009	2008	2007	2009	2008	2007
Sample	122	111	83		69	
Less than £1.00	1.0%	0%	0%	0%	0%	0%
£1.01 - £1.99	8.0%	9.0%	12.0%	10.1%	7.2%	10.1%
£2.00 - £2.99	12.3%	10.8%	25.0%	8.7%	10.1%	24.6%
£3.00 - £3.99	29.5%	34.2%	19.3%	36.2%	39.1%	20.3%
£4.00 - £4.99	9.8%	7.2%	12.0%	11.6%	8.7%	14.5%
£5.00 - £5.99	9.0%	12.6%	3.6%	5.8%	10.1%	4.3%
£6.00 - £6.99	6.6%	6.3%	10.8%	7.2%	5.8%	10.1%
£7.00 - £7.99	7.4%	8.1%	6.0%	7.2%	7.2%	5.8%
£8.00 or over	16.4%	11.7%	10.8%	13.0%	10.1%	10.1%

In 2009 just over 16% of adult admission charges were in the top £8.00 or more bracket. This compares to nearly 12% in 2008 and 11% in 2007 amongst non-common samples. Amongst common samples the rise is less pronounced but shows a greater proportion in the top bracket in 2009 (13%) compared to 2008 and 2007 (10.1%).

4. Visits 2009

This section presents analysis of visits data for year 2009.

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

4.1 Visits 2009 (submitted by respondents)

Table 4.1 Overall visits 2009 by admission

Admission	Sample	Total visits 2009
Free	74	6,544,387
Paid	121	6,728,961
Total	195	13,273,348

In 2009 a total of 195 attractions gave their admission details (whether free or paid) and submitted visitor numbers. For these attractions of Wales the total visitor number was 13,273,348. Interestingly visits between free and paid were split almost equally (each receiving between 6.5 and 6.7 million visits) although there were approximately a third more paid attractions than free attractions.

Table 4.2 Overall visits 2009 by admission and region

Region	Free Admission		Paid Admission		All Attractions	
	Sample	Total visits 2009	Sample	Total visits 2009	Sample	Total visits 2009
Mid Wales	9*	415,267	28	966,581	37	1,381,848
North Wales	13	620,848	46	2,863,566	59	3,484,414
SE Wales	26	3,389,801	15	595,922	41	3,985,723
SW Wales	26	2,118,471	32	2,302,892	58	4,421,363
Total	74	6,544,387	121	6,728,961	195	13,273,348

In North Wales there were 46 paid admission attractions with nearly 2.9 million visits, compared to 13 free attractions with a net of just over 600,000 visits.

This compares to South East Wales which has just 15 paid attractions (attracting nearly 600,000 visits) and 26 free admission attractions with nearly 3.4 million visits.

Table 4.3 Regions' share of attractions and visits 2009

Region	% of attractions	% of visits 2009	Average visits per attraction per region
Sample	239		
Mid Wales	17.3%	8.4%	33,046
North Wales	28.4%	22.1%	53,034
SE Wales	24.7%	34.9%	96,139
SW Wales	28.0%	34.6%	84,329
Total		16,550,037	68,107

The region with the largest volume of responding attractions is North Wales (28.4%) closely followed by South West Wales (28%). However, in terms of percentage of visits South East Wales attracts the highest proportion of visits (34.9% of all visits are made in this area) followed closely by South West Wales (34.6%).

Table 4.4 Overall visits 2009 by admission and category

Category	Free Admission		Paid Admission		All Attractions	
	Sample	Total visits 2009	Sample	Total visits 2009	Sample	Total visits 2009
Historic property	10*	546,032	46	2,058,822	56	2,604,854
Museum or art gallery	39	3,755,514	20	450,201	59	4,205,715
Industrial or craft attraction	7*	232,049	10*	599,695	17	831,744
Country park, garden, other natural	16	1,995,592	18	1,615,779	34	3,611,371
Wildlife attraction	1**	-	8*	265,740	9*	-
Themed attraction, leisure park/ centre	1**	-	3*	730,734	4*	-
Railway or tramway	0	0	13	872,283	13	872,283
Total	74	6,544,387	118	6,593,254	192	13,137,641

*caution: low base

**Sample size too small and would breach confidentiality

Country parks, gardens and other nature-based attractions show the most balance between the volume of free and paid admission attractions responding and the total visits within each group: there were 16 free admission attractions and 18 paid attractions with nearly 2 million visits to the free admission attractions and 1.6 million to the paid admission attractions.

Table 4.5 Average visits 2009 by category

Category	Sample	Average visits 2009
Historic property	62	45,978
Museum or art gallery	70	67,867
Industrial or craft attraction	19	45,191
Country park, garden, other natural	48	107,096
Wildlife attraction	10*	28,278
Themed attraction, leisure park/ centre	9*	184,181
Railway or tramway	14	62,383
Total	232	70,751

*caution: low base

Themed attractions such as leisure parks/ leisure centres have the highest average number of visits at 184,181 per attraction. This is followed by country parks, gardens, other nature-based attractions (107,096). Attractions exhibiting the lowest average number of visits were wildlife attractions with 28,278 average visits in 2009.

Table 4.6 Overall visits 2009 by admission and geographic location

Location	Free Admission		Paid Admission		All Attractions	
	Sample	Total visits 2009	Sample	Total visits 2009	Sample	Total visits 2009
Coastal	2*	20,277	22	1,575,928	24	1,596,205
Rural	32	2,478,950	78	3,847,732	110	6,326,682
Urban	40	4,045,160	20	1,227,070	60	5,272,230
Total	74	6,544,387	120	6,650,730	194	13,195,117

*caution: low base

Urban attractions have the highest proportion free admission (40 of the 60 were free) compared to coastal attractions where just 2 of the 24 were free and rural attractions where just under half (41%) were free.

Table 4.7 Average visits 2009 by geographic location

Location	Sample	Average visits 2009
Coastal	24	66,508
Rural	110	57,515
Urban	60	87,870
Total	194	68,016

Urban based attractions exhibit the highest volume of visitor numbers in 2009 with an average visit per attraction of 87,870. This compares to 57,515 in rural attractions.

Table 4.8 Overall visits 2009 by admission and ownership

Ownership	Free Admission		Paid Admission		All Attractions	
	Sample	Total visits 2009	Sample	Total visits 2009	Sample	Total visits 2009
Cadw	2*	79,753	23	1,136,157	25	1,215,910
Government	7*	1,652,459	0	0	7*	1,652,459
Local authority	31	2,115,959	18	1,348,600	49	3,464,559
National Trust	0	0	18	945,579	18	945,579
Private owner or trust	34	2,696,216	62	3,298,625	96	5,994,841
Total	74	6,544,387	121	6,728,961	195	13,273,348

*caution: low base

The largest volume of visits were made to properties under private ownership/ trust with nearly 6 million visits falling into attractions under this ownership. The next most-visited attractions were owned by local authorities (nearly 3.5 million visits).

Table 4.9 Average visits 2009 by ownership

Ownership	Sample	Average visits 2009
Cadw	25	48,636
Government	7*	236,065
Local authority	49	70,705
National Trust	18	52,532
Private owner or trust	96	62,446
Total	195	68,068

*caution: low base

The Government-owned attractions (Museums and Galleries of Wales) attracted the highest volume of visitors on average across their seven sites: 236,065. This compares to Cadw which attracted an average of 48,636 across its portfolio of properties in 2009.

Table 4.10 Overall visits 2009 by range of visits and admission

Range of visits	Free Admission		Paid Admission		All Attractions	
	Sample	Total visits 2009	Sample	Total visits 2009	Sample	Total visits 2009
0-1,999	6	6,574	5	4,294	11	10,868
2,000-4,999	6	20,571	13	43,715	19	64,286
5,000-9,999	9	58,755	14	102,562	23	161,317
10,000-19,999	20	279,252	19	267,578	39	546,830
20,000-49,999	15	487,532	30	1,004,065	45	1,491,597
50,000-99,999	6	441,256	21	1,616,302	27	2,057,558
100,000-149,999	8	957,466	10	1,284,125	18	2,241,591
150,000-199,999	6	1,024,821	4	720,075	10	1,744,896
200,000 and over	7	3,385,670	5	1,686,245	12	5,071,915
Total	83	6,661,897	121	6,728,961	204	13,390,858

In Wales in 2009 a total of twelve attractions exhibited visitor numbers in excess of 200,000. Of these seven were free attractions and five were paid attractions.

4.2 Factors affecting visitation

Attraction operators were asked to indicate what positive and negative factors they believed had affected their total visits figures in 2009 compared to those in 2008. The comments they gave were unprompted – that is the answers were not pre-chosen, but recorded on blank lines for the respondent to write in. 118 respondents answered.

Table 4.11 Positive factors

Most important positive factor	No. responses	%
Credit crunch	31	26%
Weather	27	23%
Advertising/ Marketing	19	16%
New/ improved facilities	9	8%
Events/ temporary exhib	7	6%
Repeat/ Regular visits	5	4%
Diversity/ improve what's on offer	3	3%

The credit crunch was the most mentioned positive factor- for keeping visitors in the country and not taking holidays abroad – with 26% of attractions responding mentioning this as a positive reason for visits. This was closely followed by weather (23%) and advertising/ marketing (16%).

Table 4.12 Negative factors

Most important negative factor	No. responses	%
Weather	57	48%
Credit crunch	18	15%
Signage/ lack of signage	4	3%
Lack of funding/ budget/ finance	3	3%
Less school/ coach visits	3	3%

The most negative factor for attractions was the weather – mentioned by nearly half (48%) of the 118 attractions who responded to this question. This was followed by credit crunch (15%).

5. Operations

5.1 Gross revenue movement

This section represents an overview of gross revenue, revenue generated from tourists, employment in tourism activities, marketing activities and upgrade/ investment in the attraction sector. It should be noted that, as in previous sections of the research, not all respondents answered all questions, and those not responding have been left out of the samples relevant to the individual questions.

Table 5.1 Gross revenue movement 2009/8/7 (different samples)

Gross revenue movement	2009/8	2008/7	2007/6
Sample	141	140	170
Down	16%	31%	19%
Similar	40%	39%	41%
Up	44%	30%	40%

In 2009 44% of attractions said that their revenue movement was up on the previous year, with 40% saying it was similar and 16% saying it was down. This is a more positive picture than in previous years (in 2008 30% said their revenue was up).

Table 5.2 Average gross revenue movement 2009/8/7 (different samples)

Gross revenue movement	2009/8	2008/7	2007/6
Down	25%	14%	13%
Similar	-	-	-
Up	19%	15%	26%

The average gross revenue movement for 2009 was 25% amongst those who claimed their revenue was down (considerably higher than in 2008 and 2007) and 19% amongst those who said their revenue movement was up (higher than in 2008 when it was 15% but lower than 2007 when it was 26%).

Table 5.3 Average revenue movement 2009/8 by band

Gross revenue movement band	Sample	%
Over -50% decrease	3	2.3%
-21% to -50% decrease	3	2.3%
-11% to -20% decrease	6	4.7%
-1% to -10% decrease	5	3.9%
0% (no change)	57	44.5%
1% to 10% increase	24	18.8%
11% - 20% increase	17	13.3%
21% - 50% increase	10	7.8%
Over 50% increase	3	2.3%
Total	128	
Average trend		+8.7%

*caution: low base

In 2009 a total of nearly 5% of attractions said their gross revenue movement was a decrease of between 21% or more. However over 10% claimed they had a revenue increase of 21% or more.

Table 5.4 Average revenue movement 2009/8 by category

Category	Sample	Average revenue trend
Historic property	19	+13.8%
Museum or art gallery	44	+2.2%
Industrial or craft attraction	14	+6.1%
Country park, garden, other natural	25	+1.5%
Wildlife attraction	7	-2.0%
Themed attr., leisure parks and centres	3	-12.3%
Railway or tramway	12	+19.8%
Total	124	+5.4%

*caution: low base

The average revenue movement was highest for railways and tramways: up nearly 20% on the previous year. This compares to themed attractions with a negative revenue movement of 12.3%.

5.2 Average revenue per visitor (£) 2009

Attraction operators were asked to provide the average revenue (including VAT) per visitor, i.e. the total spend per category divided by total visitors to the attraction overall. In total 107 attractions provided the breakdown of such information.

Notes to understand the average revenue:

- Average revenue is calculated by adding the total average revenue provided by operators within each category and then dividing the results by the total number of responding attractions.
- The 'other' spend element includes workshops, hire, tuition etc.

Table 5.5 Average visitor revenue per attraction by category

Category	Sample	Admissions	Donations	Catering	Retail	Other	Total
Historic property	15	£1.73	£0.22	£0.70	£1.05	£0.00	£3.70
Museum or art gallery	35	£0.81	£0.17	£0.46	£0.74	£0.01	£2.20
Industrial or craft attraction	16	£2.39	£0.06	£1.13	£4.42	£0.65	£8.65
Country park, garden, other natural	21	£1.85	£0.15	£1.60	£2.11	£0.86	£6.56
Wildlife attraction	5*	£8.87	£0.11	£1.27	£1.12	£0.31	£11.68
Themed attr., leisure parks and centres	3*	£0.67	£0.00	£4.17	£1.83	£4.50	£11.17
Railway or tramway	12	£7.49	£0.18	£1.94	£1.52	£0.21	£11.34
Average	107	£2.50	£0.15	£1.13	£1.74	£0.44	£5.95

*caution: low base

**Sample size too small and would breach confidentiality

The average revenue per visitor was £5.95 with the largest proportion of that revenue coming from admission (£2.50) followed by retail (£1.74). Attractions with the highest average revenue were railways and tramways (£11.34 – over half of which was from admission) and the lowest was museums and galleries (£2.20 per visitor).

Table 5.6 Average visitor revenue per attraction by category and admission

Category		Sample	Admissions	Donations	Catering	Retail	Other	Total
Historic property	Free	4*	£0.00	£0.29	£0.88	£0.02	£0.00	£1.18
	Paid	15	£1.73	£0.32	£0.99	£1.06	£0.00	£4.10
Museum or art gallery	Free	23	£0.00	£0.16	£0.25	£0.80	£0.02	£1.24
	Paid	12	£2.36	£0.18	£0.86	£0.64	£0.00	£4.04
Industrial or craft attraction	Free							
	Paid	8*	£0.00	£0.12	£0.78	£6.46	£1.25	£8.61
Country park, garden, other natural		8*	£4.78	£0.00	£1.48	£2.38	£0.05	£8.69
	Free	10*	£0.00	£0.13	£1.50	£2.31	£1.28	£6.21
	Paid	11	£2.62	£0.17	£1.70	£1.92	£0.48	£6.88
Wildlife attraction	Free	0	-	-	-	-	-	-
	Paid	5*	£8.87	£0.11	£1.27	£1.12	£0.31	£11.68
Themed attr., leisure parks and centres	Free	1**	-	-	-	-	-	-
	Paid	2*	£1.00	£0.00	£6.25	£2.75	£6.75	£16.75
Railway or tramway	Free	0	-	-	-	-	-	-
	Paid	12	£7.49	£0.18	£1.94	£1.52	£0.25	£11.37
Average								
	Free	46	£0.00	£0.16	£0.79	£2.14	£0.62	£3.71
	Paid	65	£3.96	£0.18	£1.50	£1.43	£0.37	£7.44

*caution: low base

**Sample size too small and would breach confidentiality

Looking at average revenue by visitor for free and paid attractions, free attractions have an average revenue of £3.71 compared to paid attractions who have an average revenue of £7.44.

Table 5.7 Average visitor revenue per attraction by region

Region	Sample	Admissions	Donations	Catering	Retail	Other	Total
Mid Wales	23	£3.54	£0.15	£1.51	£1.05	£0.62	£6.87
North Wales	30	£3.69	£0.16	£1.39	£1.49	£0.79	£7.53
South East Wales	20	£0.81	£0.10	£0.43	£1.63	£0.01	£2.97
South West Wales	34	£1.74	£0.16	£1.05	£2.49	£0.26	£5.69
Average	107	£2.50	£0.15	£1.13	£1.74	£0.44	£5.96

South East Wales (with its higher proportion of free attractions) demonstrates the lowest average visitor revenue in 2009 (2.97 per visitor) compared to attractions in North Wales with an average visitor revenue of £7.53.

Table 5.8 Average visitor revenue per attraction by region and admission

Region		Sample	Admissions	Donations	Catering	Retail	Other	Total
Mid Wales	Free	4*	£0.00	£0.34	£0.00	£0.33	£2.50	£3.17
	Paid	19	£4.29	£0.12	£1.82	£1.20	£0.22	£7.65
North Wales	Free	9*	£0.00	£0.09	£1.33	£0.91	£1.32	£3.66
	Paid	21	£4.80	£0.20	£1.42	£1.74	£0.56	£8.72
South East Wales	Free	15	£0.00	£0.10	£0.40	£1.58	£0.02	£2.09
	Paid	5*	£3.23	£0.10	£0.51	£1.77	£0.00	£5.62
South West Wales	Free	18	£0.00	£0.19	£1.01	£3.64	£0.36	£5.20
	Paid	16	£3.70	£0.13	£1.09	£1.19	£0.14	£6.25
Average								
	Free	46	£0.00	£0.16	£0.79	£2.14	£0.62	£3.71
	Paid	61	£4.22	£0.15	£1.38	£1.43	£0.30	£7.48

*caution: low base

Looking at free attractions, those in South West Wales have the highest revenue (£5.20) compared to free attractions in South East Wales (£2.09).

Looking at paid attractions those in North Wales have the highest revenue (£8.72) compared to those in South East Wales (£5.62),

Table 5.9 Average visitor revenue per attraction by geographic location

Region	Sample	Admissions	Donations	Catering	Retail	Other	Total
Coastal	9*	£5.54	£0.06	£0.61	£2.41	£0.03	£8.65
Rural	63	£2.93	£0.15	£1.36	£2.11	£0.51	£7.05
Urban	35	£0.66	£0.18	£0.84	£0.91	£0.42	£3.01
Average	107	£2.41	£0.15	£1.13	£1.74	£0.44	£5.86

*caution: low base

Attractions in Urban areas have the lowest revenue per visitor (£3.01) – a figure likely to be affected by the greater proportion of free attractions in these areas. Attractions in coastal areas have the highest visitor revenue at £8.65.

Table 5.10 Average visitor revenue per attraction by geographic location and admission

Region		Sample	Admissions	Donations	Catering	Retail	Other	Total
Coastal	Free	1**	-	-	-	-	-	-
	Paid	9*	£6.24	£0.07	£0.62	£0.77	£0.03	£7.78
Rural	Free	22	£0.00	£0.10	£0.82	£2.82	£1.05	£4.79
	Paid	41	£4.50	£0.17	£1.64	£1.72	£0.22	£8.26
Urban	Free	23	£0.00	£0.22	£0.76	£0.91	£0.24	£2.14
	Paid	12	£1.93	£0.11	£1.00	£0.89	£0.75	£4.68
Average								
	Free	46	£0.00	£0.16	£0.79	£2.14	£0.62	£3.75
	Paid	62	£4.15	£0.14	£1.36	£1.41	£0.30	£7.36

*caution: low base

**Sample size too small and would breach confidentiality

Free attractions in rural locations attract a higher revenue (£4.79) compared to those in urban locations (£2.14) driven principally by revenue from retail.

5.3 Employment 2009

Attraction operators were asked to provide a breakdown of staff employed in tourism-related activities in 2009. A total of 151 attractions responded to this part of the survey.

Table 5.11 Total employees reported in 2009

Employment type	Sample 151	%
Full time permanents	797	16.3%
Full time seasonals	285	5.8%
Part time permanents	474	9.7%
Part time seasonals	711	14.6%
Unpaid volunteers permanent	471	9.7%
Unpaid volunteers seasonal	2127	43.7%
Total	4865	

Amongst the attractions responding a total of 4,865 people were employed in some way – either as a paid member of staff or as a volunteer. The largest group was unpaid seasonal volunteers with nearly 44% of all employment falling into this type. The least common categories were part time permanents and unpaid permanent volunteers, each accounting for nearly 10% of the total employment figure.

Table 5.12 Total employees reported in 2009 by category

Category	Total number of employees								% of employees						
	Sam- ple	FTP	FTS	PTP	PTS	UVP	UVS	Total	%FTP	%FTS	%PTP	%PTS	%UVP	%UVS	Sam- ple
Historic property	47	114	13	46	151	6	330	660	17.3%	2.0%	7.0%	22.9%	0.9%	50.0%	100%
Museum or art gallery	53	154	10	146	65	215	269	859	17.9%	1.2%	17.0%	7.6%	25.0%	31.3%	100%
Industrial or craft attr.	17	91	47	51	169	9	3	370	24.6%	12.7%	13.8%	45.7%	2.4%	0.8%	100%
Country park, garden, other natural	28	139	67	86	128	53	71	544	25.6%	12.3%	15.8%	23.5%	9.7%	13.1%	100%
Wildlife attraction	8*	49	18	13	49	6	53	188	26.1%	9.6%	6.9%	26.1%	3.2%	28.2%	100%
Themed attr. Leisure park/centre	4*	73	15	89	3	2	0	182	40.1%	8.2%	48.9%	1.6%	1.1%	0%	100%
Railway or tramway	12	163	108	35	120	50	1257	1733	6.4%	4.3%	1.4%	4.7%	2.0%	49.6%	100%
Total	169	783	278	466	685	341	1983	4536	17.3%	6.1%	10.3%	15.1%	7.5%	43.7%	100%

*caution: low base

Historic properties and railways and tramways employ the greatest proportions of unpaid seasonal volunteers (nearly 44% for railways/ tramways and 50% for historic properties). Looking at full time employees they are in the greatest proportions in themed attractions (nearly 40%) and wildlife attractions (just over 26%).

Table 5.13 Total employees 2009/8 and 2009/7

	2009	2008	%2009/8	2009	2007	%2009/7
Sample		103			48	
Full time permanents	490	507	-3.4%	250	272	-8.1%
Full time seasonals	174	139	+25.2%	105	127	-17.3%
Part time permanents	311	282	+10.3%	146	145	+1.0%
Part time seasonals	365	313	+16.6%	189	139	+35.9%
Unpaid volunteers permanent	165	185	-10.8%	35	30	+16.7%
Unpaid volunteers seasonal	1095	792	+38.3%	490	515	-4.9%

Between 2008 and 2009 the largest staff increase was in the unpaid seasonal volunteers – up over 38%, while permanent unpaid volunteers has decreased by nearly 11%.

Table 5.14 Recruitment difficulties 2009

Recruiting difficulties	Sample	%
Yes	16	10.9%
No	114	78.1%
N/A (no recruitment carried out)	16	10.9%
Total	146	

The majority of attractions did not have recruitment difficulties in 2009: 78% said no with nearly 11% saying they did have problems and nearly 11% saying they did not recruit.

Table 5.15 Retaining difficulties 2009

Retaining difficulties	Sample	%
Yes	7	5.1%
No	130	94.9%
Total	137	

The vast majority of attractions did not have problems with the retention of staff: only approximately 5% of attractions said they did have a problem.

5.4 Marketing expenditure 2009/8

Table 5.16 Marketing expenditure levels in 2009 compared with 2008

Marketing expenditure levels	Sample	%
Down	23	16.5%
Similar	90	64.7%
Up	26	18.7%
Total	139	

For nearly two thirds (64.7%) of attractions, the marketing expenditure in 2009 compared to that of 2008. For nearly 19% of attractions it was up and for nearly 17% it was down.

Table 5.17 Marketing expenditure levels in 2009 (compared with 2008), 2009 (compared with 2007) – different and common samples

	Sample	Common sample		Different samples	
		2009/8	2009/7	2009/8	2009/7
		83		139	
Down		14.5%	12.0%	16.5%	32.3%
Similar		70.0%	72.3%	64.7%	53.4%
Up		15.7%	15.7%	18.7%	14.3%
Total		100%	100%	100%	100%

Looking at marketing expenditure over time between 2009 and 2008 a slightly greater proportion said their expenditure was down (12% in 2008, nearly 15% in 2009). Between 2009 and 2007 the picture is more positive with those saying expenditure was down at just over 32% in 2007 compared to nearly 17% in 2009.

5.5 Language services

In this section of the questionnaire the respondents were asked whether their attraction catered for Welsh, French or German visitors linguistically. It should be noted that response to this question was low, with base sizes to each language indicated in the table below.

Table 5.18a Provision of information and/or tours in **Welsh** in 2009 and 2010

	2009 Welsh	2010 Welsh
No	7.5%	6.7%
Yes	92.5%	93.3%
Total	120	104

Amongst those attractions responding to this question 92.5% say they offer information and/or tours in the Welsh language in 2009 with a slightly higher proportion (93.3%) saying they intend to do so in 2010.

Table 5.18a Provision of information and/or tours in **foreign languages** in 2009 and 2010

	2009		2010	
	French	German	French	German
No	29.4%	30%	28.1%	34.6%
Yes	70.6%	70%	71.9%	65.4%
Total	34	30	32	26

Few attractions responded to the question on whether foreign languages were offered as part of a tour/ information. Amongst those who did respond to this question nearly 71% offer French and 70% offer German. Intention to offer French rises slightly to nearly 72% for 2010 but declines slightly to 65.4% for German.

5.6 Improvements/ upgrade 2009

Attraction operators were asked to indicate whether they had made any kind of upgrade or improvement to their attraction in 2008 (excluding normal repairs and upkeep).

Table 5.19 Improvements/ upgrade in 2009

Did upgrade/ improvements	Sample	%
Yes	92	63.0%
No	54	37.0%
Total	146	

Nearly two thirds (63%) of attractions said they upgraded their attraction or made improvements in some way with 37% not doing so in 2009.

Table 5.20 Improvements/ upgrade in 2009 by band of investment

Investment band	Sample	Total investment	% of attractions	% of total investment
Value not specified	13	0	22.8%	0%
Under £1,000	6	1,050	10.5%	0%
£1,000 - £4,999	11	25,130	19.3%	1.0%
£5,000 - £9,999	2	10,000	3.5%	0%
£10,000 - £19,999	4	55,000	7.0%	2.2%
£20,000 - £49,999	8	232,738	14.0%	9.3%
£50,000 - £99,999	5	325,000	8.8%	13.0%
£100,000 - £249,999	4	636,000	7.0%	25.5%
£250,000 - £499,999	4	1,210,000	7.0%	48.5%
£500,000 - £999,999	0	0	0%	0%
£1 million and over	0	0	0%	0%
Total	57	2,494,918	100%	100%
Average investment		43,770		

Looking at the value of these improvements none were in the region of £500,000+, with the majority (52.6%) falling into the £0 to £4,999 groups.

6 Visitor Profile 2009

6.1 Adult and children visits 2009

136 respondents indicated what proportion of their visitors were adults and what proportion were children.

Table 6.1 Proportion of adult and child visitation by category

Category	Sample	Average % adults	Average % children
Historic property	23	74.4%	25.6%
Museum or art gallery	47	73.0%	27.0%
Industrial or craft attraction	15	68.3%	31.7%
Country park, garden, other natural	28	73.4%	26.6%
Wildlife attraction	9	68.9%	31.1%
Themed attracts, leisure parks & centres	4	62.5%	37.5%
Railway or tramway	10	71.7%	28.3%
Total	136	72.1%	27.9%

Overall 72,1% of visitors to attractions in Wales were adults with 27.9% being children. The highest proportion of children were at themed attractions (37.5%) and the lowest at historic properties (25.6%).

Table 6.2 Origin of visitors by category

Category	Sample	Average % overseas	Average % locals	Average % other UK
Historic property	15	18.3%	29.9%	51.8%
Museum or art gallery	38	9.2%	54.2%	36.6%
Industrial or craft attraction	11	9.4%	34.0%	56.6%
Country park, garden, other natural	24	4.3%	63.5%	32.2%
Wildlife attraction	8*	6.9%	47.6%	44.3%
Themed attracts, leisure parks & centres	2*	1.5%	57.5%	41.0%
Railway or tramway	7*	6.0%	29.1%	64.9%
Total	105	8.9%	48.6%	42.4%

*caution: low base

Across the attractions of Wales on average overseas visitors accounted for nearly 9% of visits, locals accounted for nearly 49% of visits with the remaining 42% being from the rest of the UK.

Table 6.3 Proportion of school visits by category

Category	Sample	School visits 2009	Total visits 2009	% school visits
Historic property	20	45,236	770,660	5.9%
Museum or art gallery	50	244,496	2,934,392	8.3%
Industrial or craft attraction	15	40,811	685,501	6.0%
Country park, garden, other natural	24	55,262	2,821,082	2.0%
Wildlife attraction	7*	29,076	263,240	11.0%
Themed attracts, leisure parks & centres	3*	43,281	148,458	29.2%
Railway or tramway	10*	15,910	520,975	3.1%
Total	129	474,072	8,144,308	5.8%

*caution: low base

In 2009 there school visits accounted for 474,072 visits. Museums and art galleries attracted the highest proportions of visits with nearly 245,000 school visits. This compaers to railways/ tramways with nearly 16,000 school visits.

Respondents were asked at the end of the questionnaire whether their attraction was VAQAS registered. A total of 126 attractions responded to this question with nearly two thirds (65.1%) being registered, 23.8% said they were not VAQAS registered and 11.1% were planning on becoming registered in the next year.

7. Attractions Responding in 2009 – alphabetically arranged

Below are the attractions responding to the 2009 survey who have given visitor figures.

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
PO	1940's Swansea Bay	SW	MAG	8616	7050	7030	22.2%	£4.99
NT	Aberconwy House	N	HP	16009	16009	18031	0.0%	£3.00
NT	Aberdulais Falls	SW	CP	20267	21261	23654	-4.7%	£4.00
PO	Abergavenny Museum & Castle	M	MAG	26791 *	19205	0	39.5%	
PO	Aberglasney Gardens	SW	CP	44625	47535	47131	-6.1%	£7.00
PO	Abertillery & District Museum	SE	MAG	5500 *	11430	10594	-51.9%	
PO	Aberystwyth Cliff Electric Railway	M	R/T	58387 *	46635	53176	25.2%	£3.20
LA	Afan Forest Park Visitor Centre	SW	CP	650000 *	112883	137500	475.8%	
PO	Anglesey Sea Zoo	N	WL	80533	85000	0	-5.3%	£7.25
LA	Aquadome, Afan Lido Leisure Complex	SW	Theme	264208				
PO	Bala Lake Railway	M	R/T	19626 *				£8.50
PO	Barmouth Sailors' Institute & Ty Gwyn	M	MAG	6250 *	5500	4500	13.6%	
PO	Bay Island Voyages	SE	Other	7295	7618	10000	-4.2%	£18.00
Cadw	Beaumaris Castle	N	HP	78231	67329	81638	16.2%	£3.60
LA	Beaumaris Court House	N	HP	3006	2743	3696	9.6%	
LA	Beaumaris Gaol	N	HP	10234	9383	10972	9.1%	
LA	Bersham Heritage Centre	N	MAG	8668	7298	0	18.8%	
LA	Bersham Ironworks	N	Ind	2510	2028	0	23.8%	
G	Big Pit: National Coal Museum	SE	MAG	164696	165151	155569	-0.3%	
LA	Bishop's Wood Nature Reserve & Centre	SW	CP	10000 *				£0.00
PO	Black Mountain Activities	M	Other	12427				£0.65
LA	Blackpill Wildlife Centre	SW	WL	200 *	420	0	-52.4%	
PO	Blaenavon Community Heritage & Cordell Museum	SE	MAG	1287	949	1216	35.6%	£1.00
Cadw	Blaenavon Ironworks	SE	HP	29961	18677	8361	60.4%	
PO	Blaina Museum & Heritage Centre	SE	MAG	4073 *	3766	3820	8.2%	
LA	Bodelwyddan Castle	N	MAG	34555	39472	0	-12.5%	£5.50
NT	Bodnant Garden	N	CP	149036	138313	151973	7.8%	£7.50
PO	Bodrhyddan Hall	N	HP	2940 *	782		276.0%	£5.00
LA	Brecknock Museum & Art Gallery	M	MAG	20169	19257	16290	4.7%	£1.00
PO	Brecon Beacons Geopark Visitor Centre	SW	CP	17806 *				
PO	Brecon Cathedral and Heritage Centre	M	HP	30000 *				
PO	Brecon Mountain Railway	SE	R/T	69467	63096	70422	10.1%	£9.50
LA	Bridgend Recreation Centre	SE	Theme	451934				
LA	Bronze Bell Collection (Sailors Institute)	M	MAG	6500 *	7500	9000	-13.3%	
LA	Bryngarw Country Park	SE	CP	50800				
LA	Butetown History & Arts Centre	SE	MAG	4874				
PO	Bwlch Nant yr Arian Visitor Centre	M	CP	125000 *				
PO	Cae Dai Trust Museum	N	MAG	3050				£3.50
Cadw	Caerleon Roman Baths and Amphitheatre	SE	HP	49792	40555	45009	22.8%	
PO	Caernarfon Air World	N	MAG	6090 *	5000	9000	21.8%	£6.50
Cadw	Caernarfon Castle	N	HP	193683	174964	192520	10.7%	£4.95
PO	Caernarfon Maritime Museum	N	MAG	1282	1090	1001	17.6%	£1.00
Cadw	Caerphilly Castle	SE	HP	88772	83167	107048	6.7%	£3.60
LA	Caldicot Castle	SE	MAG	27513	26582	0	3.5%	£3.75
PO	Canolfan Y Plase	M	MAG	2000 *	2000	3000	0.0%	
PO	Cantref Adventure Farm	M	WL	41200	49500		-16.8%	£7.50
PO	CARAD Chronicles Community Museum	M	MAG	887 *				£3.00
LA	Cardiff Bay Visitor Centre	SE	Ind	170572	193070	196764	-11.7%	
LA	Cardiff Castle	SE	HP	221716	221903	223792	-0.1%	
LA	Cardiff Visitor Centre	SE	MAG	300451				
LA	Carew Castle & Tidal Mill	SW	HP	37413	34850	39690	7.4%	£3.90
PO	Carew Cheriton Control Tower	SW	MAG	1100 *				
LA	Carmarthenshire County Museum	SW	MAG	12889	14030	13837	-8.1%	
Cadw	Carreg Cennen Castle	SW	HP	28421	24590	27704	15.6%	£3.60

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult	
Cadw	Castell Coch	SE	HP	71745	68544	65637	4.7%	£3.60	
LA	Castell Henllys Iron Age Fort	SW	HP	29484	28949	27770	1.8%	£3.90	
LA	Cefn Coed Colliery Museum	SW	MAG	9259	10029	9686	-7.7%		
PO	Centre for Alternative Technology	M	Ind	53031				£8.40	
LA	Ceredigion Museum	M	MAG	34688	35010	37485	-0.9%		
Cadw	Chepstow Castle	SE	HP	57899	60742	64637	-4.7%	£3.60	
NT	Chirk Castle	N	HP	94353	94647	108892	-0.3%	£9.20	
LA	Clyne Gardens	SW	CP	388427	417638	0	-7.0%		
LA	Clyne Valley Country Park	SW	CP	388427					
NT	Colby Woodland Garden	SW	CP	28377	27836	31199	1.9%	£4.20	
Cadw	Conwy Castle	N	HP	181947	163668	176344	11.2%	£4.60	
PO	Conwy Nature Reserve	N	CP	96193	86145	0	11.7%	£2.50	
NT	Conwy Suspension Bridge	N	HP	13411	13411	13702	0.0%	£1.00	
LA	Cosmeston Lakes Country Park	SE	CP	210000	*				
LA	Cosmeston Medieval Village	SE	CP	18980	*				
PO	Cowbridge Physic Garden	SE	CP	80000	*				
PO	Craig-y-Nos Country Park	SW	CP	79831	*	87281	0	-8.5%	
Cadw	Criccieth Castle	N	HP	37196	34213	39066	8.7%	£3.00	
LA	Cyfarthfa Castle Museum	SE	MAG	75570	75924	68148	-0.5%		
LA	Dare Valley Country Park	SE	CP	74501	80558	0	-7.5%		
Cadw	Denbigh Castle	N	HP	10731	9675	7734	10.9%	£3.00	
PO	Devil's Bridge Waterfalls	M	CP	39155				£3.50	
LA	Doctor Who Exhibition	SE	Theme	82275					
NT	Dolaucothi Gold Mines	SW	Ind	19825	19765	0	0.3%	£3.40	
Cadw	Dolwyddelan Castle	N	HP	4387	3540		23.9%	£2.60	
LA	Dyffryn Gardens	SE	CP	49398	*	39919	35416	23.7%	£6.00
LA	Dylan Thomas Centre	SW	MAG	102392					
PO	Elan Valley Visitor Centre	M	CP	166003	*				
PO	Electric Mountain	N	Ind	200000	*	220000	200000	-9.1%	£7.50
NT	Erddig	N	HP	109960	108234	115103	1.6%	£9.80	
PO	Ffestiniog Railway	N	R/T	131767	115985	124136	13.6%	£17.95	
LA	Flat Holm	SE	CP	2582					
PO	Folly Tower	SE	HP	1250	1116	23975	12.0%		
LA	Fourteen Locks Canal Centre	SE	CP	41957	20260	0	107.1%		
LA	Gelli Aur Country Park	SW	CP	130284	*	126076	0	3.3%	
PO	Glansevern Hall Gardens	M	CP	3487	4055	4430	-14.0%	£5.00	
PO	Glasfryn Parc	N	CP	27304	*				
PO	Glyn-Coch Craft Centre & Farm	SW	Ind	5000	3000	0	66.7%		
LA	Glynn Vivian Art Gallery	SW	MAG	43741					
LA	Gnoll Estate	SW	CP	170051	153846	0	10.5%		
PO	Goleulong 2000 Lightship	SE	HP	122280	*				
PO	Great Orme Mines	N	Ind	29223	30185	29767	-3.2%	£6.00	
LA	Great Orme Tramway	N	R/T	147382	146559	15229	0.6%	£5.40	
LA	Greenmeadow Community Farm	SE	WL	48521	50384	41975	-3.7%	£4.50	
PO	GreenWood Forest Park	N	Ind	135646				£9.80	
PO	Griffithstown Railway Museum	SE	R/T	1082	*				
LA	Gwynedd Museum and Art Gallery	N	MAG	12212	12489	0	-2.2%		
PO	Gypsy Wood Park	N	CP	11209	7400	8663	51.5%	£5.25	
Cadw	Harlech Castle	M	HP	94340	85659	94043	10.1%	£3.60	
PO	Heatherton Country Sports Park	SW	CP	206000	*				
PO	Hergest Croft Gardens	M	CP	11247	10444		7.7%	£6.00	
PO	Holyhead Maritime Museum	N	MAG	15000	*	9000	0	66.7%	£3.50
PO	Horse Drawn Boat Trips	N	Other	115985	*			£5.00	
PO	Hywel Dda Gardens & Interpretive Centre	SW	CP	730	*	1068	0	-31.6%	
PO	Inigo Jones Slateworks	N	Ind	27250	24890	29210	9.5%	£4.50	
PO	Internal Fire, Museum of Power	M	MAG	5500	6500	0	-15.4%	£4.75	
LA	Joseph Parry's Ironworkers Cottage	SE	MAG	1200	12645	1772	-90.5%		
PO	Judge's Lodging	M	HP	9890	10367	14019	-4.6%	£5.50	
LA	Kenfig Nature Reserve	SE	CP	13537					
Cadw	Kidwelly Castle	SW	HP	28457	24600	27625	15.7%	£3.00	

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
LA	Kidwelly Industrial Museum	SW	MAG	3240	3391	2924	-4.5%	
NT	Kymin (The)	SE	HP	2822	3824	0	-26.2%	£2.30
Cadw	Lamphey Bishop's Palace	SW	HP	4122	524	2231	686.6%	£3.00
Cadw	Laugharne Castle	SW	HP	12540	9685	10666	29.5%	£3.00
PO	Llanberis Lake Railway	N	R/T	80997 *	70000	61821	15.7%	£6.90
PO	Llandaff Cathedral	SE	HP	40854 *	47316	37028	-13.7%	
PO	Llandudno Ski and Snowboard Centre	N	Theme	105458 *				£13.00
NT	Llanerchaeron	M	HP	32269	32153	0	0.4%	£6.90
PO	Llangollen Motor Museum	N	MAG	5845	5257	5491	11.2%	£3.50
LA	Llanidloes Museum	M	MAG	2967	3157	16290	-6.0%	
PO	Llechwedd Slate Caverns	N	Ind	99168	102620	99757	-3.4%	£9.65
PO	Llyn Brenig Visitor Centre	N	CP	186242 *	157029	0	18.6%	
LA	Llyn Llech Owain Country Park	SW	CP	149000 *	147757	0	0.8%	
LA	Llynnon Mill	N	Ind	8465	8781	0	-3.6%	
PO	Llysyfran Reservoir Country Park	SW	CP	109607 *	94510	94504	16.0%	
PO	Llywernog Silver Lead Mine	M	Ind	6452				£7.50
PO	Magic of Life Butterfly House	M	WL	10309				£5.95
LA	Margam Country Park	SW	CP	203800	154006	0	32.3%	£1.95
PO	Melin Tregwynt	SW	Ind	30000 *	40000	25000	-25.0%	
LA	Minera Country Park & Iron Works	N	Ind	1640	1533	0	7.0%	
LA	Moelfre Seawatch	N	WL	16844	17734	20024	-5.0%	
PO	Monmouth Castle & Regimental Museum	SE	HP	4085	4310	4889	-5.2%	
LA	Monmouth Museum	SE	MAG	21343	22643	23274	-5.7%	
LA	Museum of Speed	SW	MAG	33522	37749	30759	-11.2%	
LA	Nantclwyd-Y-Dre	N	HP	3325 *				£3.60
PO	National Assembly Debating Chamber	SE	HP	127063	139925	204110	-9.2%	
PO	National Botanic Garden of Wales	SW	CP	113802	118747	155000	-4.2%	
PO	National Coracle Centre & Flour Mill	SW	Ind	4100	4946	4909	-17.1%	£3.00
G	National Museum Wales	SE	MAG	373191	325716	353079	14.6%	
G	National Roman Legion Museum	SE	MAG	64766	64192	63458	0.9%	
PO	National Showcaves Centre for Wales	SW	CP	86963	83117	81414	4.6%	£12.00
G	National Slate Museum	N	MAG	136144	122926	131555	10.8%	
G	National Waterfront Museum	SW	MAG	257888	228760	246312	12.7%	
G	National Wool Museum	SW	MAG	26970	24347	21478	10.8%	
LA	Neath Museum	SW	MAG	2701	3279	2960	-17.6%	
PO	Neuadd Goffa Ceiriog	N	MAG	100 *	50	0	100.0%	
LA	Newport Museum & Art Gallery	SE	MAG	49072	59077	56369	-16.9%	
PO	Newport Wetlands	SE	CP	60000 *				
NT	Newton House, Dinefwr Park & Castle	SW	CP	47577	46250	38000	2.9%	£6.30
LA	Newtown Textile Museum	M	MAG	1111	1862	0	-40.3%	£1.00
PO	North Wales Visitor Centre	N	MAG	1184				
PO	Norwegian Church	SE	HP	134645 *	120408	40000	11.8%	
PO	Offa's Dyke Centre	M	MAG	18022				
PO	Old Bell Museum	M	MAG	2331	1926	2023	21.0%	£1.00
PO	Old Cilgwyn Gardens	SW	CP	200				£2.00
LA	Old Station	SE	CP	100000 *	96000	85000	4.2%	
PO	Oriel Plas Glyn-Y-Weddw	N	MAG	81089				
Cadw	Oxwich Castle	SW	HP	8661	8174	7518	6.0%	£2.60
LA	Padarn Country Park	N	CP	109942 *				
LA	Parc Howard Museum and Art Gallery	SW	MAG	13876	13045	0	6.4%	
PO	Parva Farm Vineyard	SE	CP	5400 *				
LA	Pembrey Country Park	SW	CP	435354 *	401439	439854	8.4%	
PO	Pembroke Castle	SW	HP	85201	81706	82403	4.3%	£3.50
PO	Pembroke Dock Museum	SW	MAG	6336				£2.00
PO	Pembrokeshire Candle Centre & Museum	SW	Ind	8300 *	8843	8500	-6.1%	
PO	Pembrokeshire Sheepdogs	SW	WL	2500 *				£5.00
PO	Penrhos Cottage	SW	HP	50000 *				£2.00
NT	Penrhyn Castle	N	HP	186875	187271	212432	-0.2%	£9.00
PO	Phoenix Bowl	SW	Theme	15000				£0.00
LA	Plantasia	SW	CP	88970	90397	0	-1.6%	
Cadw	Plas Mawr Elizabethan Town House	N	HP	30086	25075	26352	20.0%	£4.95

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
NT	Plas Newydd	N	HP	73455	74589	66932	-1.5%	£8.25
LA	Plas Newydd	N	HP	11281	9026	8687	25.0%	£3.50
NT	Plas-yn-Rhiw	N	HP	13322	13366	0	-0.3%	£4.00
PO	Pontypool Museum	SE	MAG	28435				£2.90
LA	Pontypridd Museum	SE	MAG	16230	26708	9748	-39.2%	£2.00
PO	Porthcawl Museum	SE	MAG	824				
LA	Porthkerry Country Park	SE	CP	80000	*			
PO	Portmeirion	M	MAG	249815	216672	223271	15.3%	£7.50
NT	Powis Castle & Garden	M	HP	98141	98022	102375	0.1%	£11.00
LA	Powysland Museum & Montgomery Canal C'tr	M	MAG	7849	8804	7363	-10.8%	£1.00
LA	Quarry Hospital Visitor Centre	N	MAG	16623				
Cadw	Raglan Castle	SE	HP	59008	50873	55545	16.0%	£3.00
LA	Rhondda Heritage Park	SE	MAG	49304	45274	0	8.9%	
PO	Rhossili Gallery	SW	MAG	4650	*			£0.00
Cadw	Rhuddlan Castle	N	HP	25215	19391	18478	30.0%	£3.00
LA	Rhyl Library, Museum & Arts Centre	N	MAG	22233	* 28753	0	-22.7%	
PO	Rhyl Miniature Railway	N	R/T	9005	9192	9500	-2.0%	£2.00
LA	Rhyl Suncentre	N	Theme	92897	148871	112899	-37.6%	
Cadw	Rug Chapel	N	HP	4353	3599	0	21.0%	£3.60
LA	Ruthin Gaol	N	HP	10575	10134	10299	4.4%	£3.50
LA	Senedd-Dy Owain Glyndwr	M	HP	2059	* 3000	0	-31.4%	£1.50
PO	Shared Earth Trust, Denmark Farm	M	CP	2013	1000		101.3%	
LA	Shearwater Safari	SW	WL	638				£30.10
PO	Shell Grotto	SE	HP	1587	1303	0	21.8%	
LA	Singleton Park & Botanical Gardens	SW	CP	56513	59066	0	-4.3%	
LA	Sky Tower	N	Theme	20585	17103	0	20.4%	
PO	Snowdon Mountain Railway	N	R/T	157570	123703	126732	27.4%	£25.00
PO	Solva Woollen Mill	SW	Ind	14027	* 11728	11000	19.6%	
PO	South Stack Lighthouse	N	Ind	18428	12189	0	51.2%	
Cadw	St Davids Bishops Palace	SW	HP	26288	22746	23240	15.6%	£3.00
G	St Fagans: National History Museum	SE	MAG	628804	617979	642289	1.8%	
Cadw	Strata Florida Abbey	M	HP	4826	3441	3442	40.2%	£3.00
LA	Swansea Museum	SW	MAG	216435	175604	190000	23.3%	
LA	Swansea Museum - Floating Exhibits	SW	MAG	7035	11283	0	-37.6%	
PO	Tallylyn Railway	M	R/T	47227	46527	50426	1.5%	£12.50
PO	Techniquet	SE	MAG	171366	188518	178366	-9.1%	
PO	Teifi Valley Railway	M	R/T	17991	* 18706	18684	-3.8%	£6.00
PO	The Animalarium	M	WL	35510	* 35983	29000	-1.3%	£8.00
PO	The LC	SW	Theme	597276	451138		32.4%	£7.00
LA	The Oriol Myrddin Gallery	SW	MAG	21261	25000		-15.0%	
PO	The Playbarn	M	Theme	28000	*			£0.00
PO	The Regimental Museum of the Royal Welsh	M	MAG	15693	15326	15961	2.4%	£3.00
LA	The Tramshed	SW	MAG	167257	7574	0	2108.3%	
PO	The Welsh Chocolate Farm	SW	Ind	25000	*			£4.25
Cadw	Tintern Abbey	SE	HP	68259	60911	71785	12.1%	£3.60
NT	Toll House	N	HP	15398	13402	0	14.9%	£1.00
Cadw	Tretower Court & Castle	M	HP	0	9843	12911	-100.0%	£3.00
NT	Tudor Merchant's House	SW	HP	19283	19705	17633	-2.1%	£2.70
NT	Ty Mawr Wybrnant	N	HP	5199	5199	0	0.0%	£3.00
PO	Usk Castle	SE	HP	6102				
PO	Usk Rural Life Museum	SE	MAG	3800	* 3597	3690	5.6%	£2.00
PO	Vale of Rheidol Railway	M	R/T	38763	35232	0	10.0%	£13.50
Cadw	Valle Crucis Abbey	N	HP	9676	7964	7598	21.5%	£2.60
PO	Wales Millennium Centre	SE	MAG	1053352	1119344	882962	-5.9%	
PO	Welsh Highland Heritage Railway	N	R/T	21942	22196	19512	-1.1%	£5.50
PO	Welsh Highland Railway	N	R/T	72159				£25.00
Cadw	Weobley Castle	SE	HP	4858	4714	4770	3.1%	£2.60
PO	West Wales Museum of Childhood	SW	MAG	6148	6330		-2.9%	£5.00
Cadw	White Castle	SE	HP	11701	7478	8452	56.5%	£2.60
LA	Wrexham County Borough Museum	N	MAG	15057	14360	14806	4.9%	
PO	WWT National Wetland Centre Wales	SW	WL	46529	48069	50575	-3.2%	£7.30

8. Top 10 Free and Paid Attractions

8.1 Top 10 Paid Attractions

Table 8.1 Top ten paid attractions responding in 2009

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
PO	The LC	SW	Theme	597276	451138		32.4%	£7.00
LA	Pembrey Country Park	SW	CP	435354 *	401439	439854	8.4%	
PO	Portmeirion	M	MAG	249815	216672	223271	15.3%	£7.50
LA	Cardiff Castle	SE	HP	221716	221903	223792	-0.1%	
PO	Electric Mountain	N	Ind	200000 *	220000	200000	-9.1%	£7.50
Cadw	Caernarfon Castle	N	HP	193683	174964	192520	10.7%	£4.95
NT	Penrhyn Castle	N	HP	186875	187271	212432	-0.2%	£9.00
Cadw	Conwy Castle	N	HP	181947	163668	176344	11.2%	£4.60
PO	Snowdon Mountain Railway	N	R/T	157570	123703	126732	27.4%	£25.00
NT	Bodnant Garden	N	CP	149036	138313	151973	7.8%	£7.50

8.2 Top 10 Free Attractions

Table 8.2 Top ten free attractions responding in 2009

Owner	Name	Region	Category	2009	2008	2007	09/08
PO	Wales Millennium Centre	SE	MAG	1053352	1119344	882962	-5.9%
LA	Afan Forest Park Visitor Centre	SW	CP	650000 *	112883	137500	475.8%
G	St Fagans: National History Museum	SE	MAG	628804	617979	642289	1.8%
LA	Clyne Gardens	SW	CP	388427	417638	0	-7.0%
G	National Museum Wales	SE	MAG	373191	325716	353079	14.6%
LA	Cardiff Visitor Centre	SE	MAG	300451			
G	National Waterfront Museum	SW	MAG	257888	228760	246312	12.7%
LA	Swansea Museum	SW	MAG	216435	175604	190000	23.3%
LA	Cosmeston Lakes Country Park	SE	CP	210000 *			
PO	Heatherton Country Sports Park	SW	CP	206000 *			

9. List of Attractions by Admission (alphabetical order)

9.1 Paid Attractions

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
PO	1940's Swansea Bay	SW	MAG	8616	7050	7030	22.2%	£4.99
NT	Aberconwy House	N	HP	16009	16009	18031	0.0%	£3.00
NT	Aberdulais Falls	SW	CP	20267	21261	23654	-4.7%	£4.00
PO	Aberglasney Gardens	SW	CP	44625	47535	47131	-6.1%	£7.00
PO	Aberystwyth Cliff Electric Railway	M	R/T	58387	* 46635	53176	25.2%	£3.20
PO	Anglesey Sea Zoo	N	WL	80533	85000	0	-5.3%	£7.25
LA	Aquadome, Afan Lido Leisure Complex	SW	Theme	264208				
PO	Bala Lake Railway	M	R/T	19626	*			£8.50
PO	Bay Island Voyages	SE	Other	7295	7618	10000	-4.2%	£18.00
Cadw	Beaumaris Castle	N	HP	78231	67329	81638	16.2%	£3.60
LA	Beaumaris Court House	N	HP	3006	2743	3696	9.6%	
LA	Beaumaris Gaol	N	HP	10234	9383	10972	9.1%	
PO	Black Mountain Activities	M	Other	12427				£0.65
PO	Blaenavon Community Heritage & Cordell Museum	SE	MAG	1287	949	1216	35.6%	£1.00
LA	Bodelwyddan Castle	N	MAG	34555	39472	0	-12.5%	£5.50
NT	Bodnant Garden	N	CP	149036	138313	151973	7.8%	£7.50
PO	Bodrhyddan Hall	N	HP	2940	* 782		276.0%	£5.00
LA	Brecknock Museum & Art Gallery	M	MAG	20169	19257	16290	4.7%	£1.00
PO	Brecon Mountain Railway	SE	R/T	69467	63096	70422	10.1%	£9.50
LA	Bridgend Recreation Centre	SE	Theme	451934				
LA	Bryngarw Country Park	SE	CP	50800				
LA	Butetown History & Arts Centre	SE	MAG	4874				
PO	Cae Dai Trust Museum	N	MAG	3050				£3.50
PO	Caernarfon Air World	N	MAG	6090	* 5000	9000	21.8%	£6.50
Cadw	Caernarfon Castle	N	HP	193683	174964	192520	10.7%	£4.95
PO	Caernarfon Maritime Museum	N	MAG	1282	1090	1001	17.6%	£1.00
Cadw	Caerphilly Castle	SE	HP	88772	83167	107048	6.7%	£3.60
LA	Caldicot Castle	SE	MAG	27513	26582	0	3.5%	£3.75
PO	Canolfan Y Plase	M	MAG	2000	* 2000	3000	0.0%	
PO	Cantref Adventure Farm	M	WL	41200	49500		-16.8%	£7.50
PO	CARAD Chronicles Community Museum	M	MAG	887	* 887			£3.00
LA	Cardiff Castle	SE	HP	221716	221903	223792	-0.1%	
LA	Cardiff Visitor Centre	SE	MAG	300451				
LA	Carew Castle & Tidal Mill	SW	HP	37413	34850	39690	7.4%	£3.90
Cadw	Carreg Cennen Castle	SW	HP	28421	24590	27704	15.6%	£3.60
Cadw	Castell Coch	SE	HP	71745	68544	65637	4.7%	£3.60
LA	Castell Henllys Iron Age Fort	SW	HP	29484	28949	27770	1.8%	£3.90
LA	Cefn Coed Colliery Museum	SW	MAG	9259	10029	9686	-7.7%	
PO	Centre for Alternative Technology	M	Ind	53031				£8.40
Cadw	Chepstow Castle	SE	HP	57899	60742	64637	-4.7%	£3.60
NT	Chirk Castle	N	HP	94353	94647	108892	-0.3%	£9.20
LA	Clyne Gardens	SW	CP	388427	417638	0	-7.0%	
LA	Clyne Valley Country Park	SW	CP	388427				
NT	Colby Woodland Garden	SW	CP	28377	27836	31199	1.9%	£4.20
Cadw	Conwy Castle	N	HP	181947	163668	176344	11.2%	£4.60
PO	Conwy Nature Reserve	N	CP	96193	86145	0	11.7%	£2.50
NT	Conwy Suspension Bridge	N	HP	13411	13411	13702	0.0%	£1.00
LA	Cosmeston Medieval Village	SE	CP	18980	*			
Cadw	Criccieth Castle	N	HP	37196	34213	39066	8.7%	£3.00
LA	Dare Valley Country Park	SE	CP	74501	80558	0	-7.5%	
Cadw	Denbigh Castle	N	HP	10731	9675	7734	10.9%	£3.00
PO	Devil's Bridge Waterfalls	M	CP	39155				£3.50
LA	Doctor Who Exhibition	SE	Theme	82275				

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
NT	Dolaucothi Gold Mines	SW	Ind	19825	19765	0	0.3%	£3.40
Cadw	Dolwyddelan Castle	N	HP	4387	3540		23.9%	£2.60
LA	Dyffryn Gardens	SE	CP	49398 *	39919	35416	23.7%	£6.00
PO	Electric Mountain	N	Ind	200000 *	220000	200000	-9.1%	£7.50
NT	Erddig	N	HP	109960	108234	115103	1.6%	£9.80
PO	Ffestiniog Railway	N	R/T	131767	115985	124136	13.6%	£17.95
LA	Flat Holm	SE	CP	2582				
LA	Fourteen Locks Canal Centre	SE	CP	41957	20260	0	107.1%	
LA	Gelli Aur Country Park	SW	CP	130284 *	126076	0	3.3%	
PO	Glansevern Hall Gardens	M	CP	3487	4055	4430	-14.0%	£5.00
PO	Great Orme Mines	N	Ind	29223	30185	29767	-3.2%	£6.00
LA	Great Orme Tramway	N	R/T	147382	146559	15229	0.6%	£5.40
LA	Greenmeadow Community Farm	SE	WL	48521	50384	41975	-3.7%	£4.50
PO	GreenWood Forest Park	N	Ind	135646				£9.80
PO	Griffithstown Railway Museum	SE	R/T	1082 *				
PO	Gypsy Wood Park	N	CP	11209	7400	8663	51.5%	£5.25
Cadw	Harlech Castle	M	HP	94340	85659	94043	10.1%	£3.60
PO	Hergest Croft Gardens	M	CP	11247	10444		7.7%	£6.00
PO	Holyhead Maritime Museum	N	MAG	15000 *	9000	0	66.7%	£3.50
PO	Horse Drawn Boat Trips	N	Other	115985 *				£5.00
PO	Hywel Dda Gardens & Interpretive Centre	SW	CP	730 *	1068	0	-31.6%	
PO	Inigo Jones Slateworks	N	Ind	27250	24890	29210	9.5%	£4.50
PO	Internal Fire, Museum of Power	M	MAG	5500	6500	0	-15.4%	£4.75
PO	Judge's Lodging	M	HP	9890	10367	14019	-4.6%	£5.50
LA	Kenfig Nature Reserve	SE	CP	13537				
Cadw	Kidwelly Castle	SW	HP	28457	24600	27625	15.7%	£3.00
NT	Kymin (The)	SE	HP	2822	3824	0	-26.2%	£2.30
Cadw	Lamphey Bishop's Palace	SW	HP	4122	524	2231	686.6%	£3.00
Cadw	Laugharne Castle	SW	HP	12540	9685	10666	29.5%	£3.00
PO	Llanberis Lake Railway	N	R/T	80997 *	70000	61821	15.7%	£6.90
PO	Llandudno Ski and Snowboard Centre	N	Theme	105458 *				£13.00
NT	Llanerchaeron	M	HP	32269	32153	0	0.4%	£6.90
PO	Llangollen Motor Museum	N	MAG	5845	5257	5491	11.2%	£3.50
LA	Llanidloes Museum	M	MAG	2967	3157	16290	-6.0%	
PO	Llechweidd Slate Caverns	N	Ind	99168	102620	99757	-3.4%	£9.65
LA	Llyn Llech Owain Country Park	SW	CP	149000 *	147757	0	0.8%	
LA	Llynnon Mill	N	Ind	8465	8781	0	-3.6%	
PO	Lllysyfran Reservoir Country Park	SW	CP	109607 *	94510	94504	16.0%	
PO	Llywernog Silver Lead Mine	M	Ind	6452				£7.50
Cadw	Machinations	M	MAG		10444	6918	100.0%	
PO	Magic of Life Butterfly House	M	WL	10309				£5.95
LA	Moelfre Seawatch	N	WL	16844	17734	20024	-5.0%	
LA	Nantclwyd-Y-Dre	N	HP	3325 *				£3.60
PO	National Botanic Garden of Wales	SW	CP	113802	118747	155000	-4.2%	
PO	National Coracle Centre & Flour Mill	SW	Ind	4100	4946	4909	-17.1%	£3.00
PO	National Showcaves Centre for Wales	SW	CP	86963	83117	81414	4.6%	£12.00
PO	Neath Canal Boat Trips	SW	Other	0 *				£4.00
LA	Neath Museum	SW	MAG	2701	3279	2960	-17.6%	
PO	Neuadd Goffa Ceiriog	N	MAG	100 *	50	0	100.0%	
NT	Newton House, Dinefwr Park & Castle	SW	CP	47577	46250	38000	2.9%	£6.30
LA	Newtown Textile Museum	M	MAG	1111	1862	0	-40.3%	£1.00
PO	Old Bell Museum	M	MAG	2331	1926	2023	21.0%	£1.00
PO	Old Cilgwyn Gardens	SW	CP	200				£2.00
Cadw	Oxwich Castle	SW	HP	8661	8174	7518	6.0%	£2.60
LA	Pembrey Country Park	SW	CP	435354 *	401439	439854	8.4%	
PO	Pembroke Castle	SW	HP	85201	81706	82403	4.3%	£3.50
PO	Pembroke Dock Museum	SW	MAG	6336				£2.00
PO	Pembrokeshire Sheepdogs	SW	WL	2500 *				£5.00
PO	Penrhos Cottage	SW	HP	50000 *				£2.00

Owner	Name	Region	Category	2009	2008	2007	09/08	£ adult
NT	Penrhyn Castle	N	HP	186875	187271	212432	-0.2%	£9.00
LA	Plantasia	SW	CP	88970	90397	0	-1.6%	
Cadw	Plas Mawr Elizabethan Town House	N	HP	30086	25075	26352	20.0%	£4.95
NT	Plas Newydd	N	HP	73455	74589	66932	-1.5%	£8.25
LA	Plas Newydd	N	HP	11281	9026	8687	25.0%	£3.50
NT	Plas-yn-Rhiw	N	HP	13322	13366	0	-0.3%	£4.00
PO	Pontypool Museum	SE	MAG	28435				£2.90
PO	Porthcawl Museum	SE	MAG	824				
LA	Porthkerry Country Park	SE	CP	80000	*			
PO	Portmeirion	M	MAG	249815	216672	223271	15.3%	£7.50
NT	Powis Castle & Garden	M	HP	98141	98022	102375	0.1%	£11.00
LA	Powysland Museum & Montgomery Canal C'tr	M	MAG	7849	8804	7363	-10.8%	£1.00
Cadw	Raglan Castle	SE	HP	59008	50873	55545	16.0%	£3.00
LA	Rhondda Heritage Park	SE	MAG	49304	45274	0	8.9%	
Cadw	Rhuddlan Castle	N	HP	25215	19391	18478	30.0%	£3.00
PO	Rhyl Miniature Railway	N	R/T	9005	9192	9500	-2.0%	£2.00
LA	Rhyl Suncentre	N	Theme	92897	148871	112899	-37.6%	
Cadw	Rug Chapel	N	HP	4353	3599	0	21.0%	£3.60
LA	Ruthin Gaol	N	HP	10575	10134	10299	4.4%	£3.50
LA	Senedd-Dy Owain Glyndwr	M	HP	2059	*	3000	0	-31.4%
LA	Shearwater Safari	SW	WL	638				£30.10
PO	Shell Grotto	SE	HP	1587	1303	0	21.8%	
LA	Singleton Park & Botanical Gardens	SW	CP	56513	59066	0	-4.3%	
LA	Sky Tower	N	Theme	20585	17103	0	20.4%	
PO	Snowdon Mountain Railway	N	R/T	157570	123703	126732	27.4%	£25.00
PO	South Stack Lighthouse	N	Ind	18428	12189	0	51.2%	
Cadw	St Davids Bishops Palace	SW	HP	26288	22746	23240	15.6%	£3.00
Cadw	Strata Florida Abbey	M	HP	4826	3441	3442	40.2%	£3.00
PO	Talylyn Railway	M	R/T	47227	46527	50426	1.5%	£12.50
PO	Techniquet	SE	MAG	171366	188518	178366	-9.1%	
PO	Teifi Valley Railway	M	R/T	17991	*	18706	18684	-3.8%
PO	The Animalarium	M	WL	35510	*	35983	29000	-1.3%
PO	The LC	SW	Theme	597276	451138		32.4%	£7.00
PO	The Playbarn	M	Theme	28000	*			£0.00
PO	The Regimental Museum of the Royal Welsh	M	MAG	15693	15326	15961	2.4%	£3.00
PO	The Welsh Chocolate Farm	SW	Ind	25000	*			£4.25
Cadw	Tintern Abbey	SE	HP	68259	60911	71785	12.1%	£3.60
NT	Toll House	N	HP	15398	13402	0	14.9%	£1.00
Cadw	Tretower Court & Castle	M	HP	0	9843	12911	100.0%	£3.00
NT	Tudor Merchant's House	SW	HP	19283	19705	17633	-2.1%	£2.70
NT	Ty Mawr Wybrnant	N	HP	5199	5199	0	0.0%	£3.00
PO	Usk Rural Life Museum	SE	MAG	3800	*	3597	3690	5.6%
PO	Vale of Rheidol Railway	M	R/T	38763	35232	0	10.0%	£13.50
Cadw	Valle Crucis Abbey	N	HP	9676	7964	7598	21.5%	£2.60
PO	Welsh Highland Heritage Railway	N	R/T	21942	22196	19512	-1.1%	£5.50
PO	Welsh Highland Railway	N	R/T	72159				£25.00
Cadw	Weobley Castle	SE	HP	4858	4714	4770	3.1%	£2.60
PO	West Wales Museum of Childhood	SW	MAG	6148	6330		-2.9%	£5.00
Cadw	White Castle	SE	HP	11701	7478	8452	56.5%	£2.60
PO	WWT National Wetland Centre Wales	SW	WL	46529	48069	50575	-3.2%	£7.30

9.2 Free Attractions

Owner	Name	Region	Category	2009	2008	2007	09/08
PO	Abergavenny Museum & Castle	M	MAG	26791 *	19205	0	39.5%
PO	Abertillery & District Museum	SE	MAG	5500 *	11430	10594	-51.9%
LA	Afan Forest Park Visitor Centre	SW	CP	650000 *	112883	137500	475.8%
PO	Barmouth Sailors' Institute & Ty Gwyn	M	MAG	6250 *	5500	4500	13.6%
LA	Bersham Heritage Centre	N	MAG	8668	7298	0	18.8%
LA	Bersham Ironworks	N	Ind	2510	2028	0	23.8%
G	Big Pit: National Coal Museum	SE	MAG	164696	165151	155569	-0.3%
LA	Bishop's Wood Nature Reserve & Centre	SW	CP	10000 *			
LA	Blackpill Wildlife Centre	SW	WL	200 *	420	0	-52.4%
Cadw	Blaenavon Ironworks	SE	HP	29961	18677	8361	60.4%
PO	Blaina Museum & Heritage Centre	SE	MAG	4073 *	3766	3820	8.2%
PO	Brecon Beacons Geopark Visitor Centre	SW	CP	17806 *			
PO	Brecon Cathedral and Heritage Centre	M	HP	30000 *			
LA	Bronze Bell Collection (Sailors Institute)	M	MAG	6500 *	7500	9000	-13.3%
PO	Bwlch Nant yr Arian Visitor Centre	M	CP	125000 *			
Cadw	Caerleon Roman Baths and Amphitheatre	SE	HP	49792	40555	45009	22.8%
LA	Cardiff Bay Visitor Centre	SE	Ind	170572	193070	196764	-11.7%
PO	Carew Cheriton Control Tower	SW	MAG	1100 *			
LA	Carmarthenshire County Museum	SW	MAG	12889	14030	13837	-8.1%
LA	Ceredigion Museum	M	MAG	34688	35010	37485	-0.9%
LA	Cosmeston Lakes Country Park	SE	CP	210000 *			
PO	Cowbridge Physic Garden	SE	CP	80000 *			
PO	Craig-y-Nos Country Park	SW	CP	79831 *	87281	0	-8.5%
LA	Cyfarthfa Castle Museum	SE	MAG	75570	75924	68148	-0.5%
LA	Dylan Thomas Centre	SW	MAG	102392			
PO	Elan Valley Visitor Centre	M	CP	166003 *			
PO	Folly Tower	SE	HP	1250	1116	23975	12.0%
PO	Glasfryn Parc	N	CP	27304 *			
PO	Glyn-Coch Craft Centre & Farm	SW	Ind	5000	3000	0	66.7%
LA	Glynn Vivian Art Gallery	SW	MAG	43741			
LA	Gnoll Estate	SW	CP	170051	153846	0	10.5%
PO	Goleulong 2000 Lightship	SE	HP	122280 *			
LA	Gwynedd Museum and Art Gallery	N	MAG	12212	12489	0	-2.2%
PO	Heatherton Country Sports Park	SW	CP	206000 *			
LA	Joseph Parry's Ironworkers Cottage	SE	MAG	1200	12645	1772	-90.5%
LA	Kidwelly Industrial Museum	SW	MAG	3240	3391	2924	-4.5%
PO	Llandaff Cathedral	SE	HP	40854 *	47316	37028	-13.7%
PO	Llyn Brenig Visitor Centre	N	CP	186242 *	157029	0	18.6%
LA	Margam Country Park	SW	CP	203800	154006	0	32.3%
PO	Melin Tregwynt	SW	Ind	30000 *	40000	25000	-25.0%
LA	Minera Country Park & Iron Works	N	Ind	1640	1533	0	7.0%
PO	Monmouth Castle & Regimental Museum	SE	HP	4085	4310	4889	-5.2%
LA	Monmouth Museum	SE	MAG	21343	22643	23274	-5.7%
LA	Museum of Speed	SW	MAG	33522	37749	30759	-11.2%
PO	National Assembly Debating Chamber	SE	HP	127063	139925	204110	-9.2%
G	National Museum Wales	SE	MAG	373191	325716	353079	14.6%
G	National Roman Legion Museum	SE	MAG	64766	64192	63458	0.9%
G	National Slate Museum	N	MAG	136144	122926	131555	10.8%
G	National Waterfront Museum	SW	MAG	257888	228760	246312	12.7%
G	National Wool Museum	SW	MAG	26970	24347	21478	10.8%
LA	Newport Museum & Art Gallery	SE	MAG	49072	59077	56369	-16.9%
PO	Newport Wetlands	SE	CP	60000 *			
PO	North Wales Visitor Centre	N	MAG	1184			
PO	Norwegian Church	SE	HP	134645 *	120408	40000	11.8%
PO	Offa's Dyke Centre	M	MAG	18022			
LA	Old Station	SE	CP	100000 *	96000	85000	4.2%
PO	Oriel Plas Glyn-Y-Weddw	N	MAG	81089			
LA	Padarn Country Park	N	CP	109942 *			

Owner	Name	Region	Category	2009	2008	2007	09/08
LA	Parc Howard Museum and Art Gallery	SW	MAG	13876	13045	0	6.4%
PO	Parva Farm Vineyard	SE	CP	5400 *			
PO	Pembrokeshire Candle Centre & Museum	SW	Ind	8300 *	8843	8500	-6.1%
PO	Phoenix Bowl	SW	Theme	15000			
PO	Piggery Pottery	N	Ind				
LA	Pontypridd Museum	SE	MAG	16230	26708	9748	-39.2%
LA	Quarry Hospital Visitor Centre	N	MAG	16623			
PO	Rhossili Gallery	SW	MAG	4650 *			
LA	Rhyl Library, Museum & Arts Centre	N	MAG	22233 *	28753	0	-22.7%
PO	Shared Earth Trust, Denmark Farm	M	CP	2013	1000		101.3%
PO	Solva Woollen Mill	SW	Ind	14027 *	11728	11000	19.6%
G	St Fagans: National History Museum	SE	MAG	628804	617979	642289	1.8%
LA	Swansea Museum	SW	MAG	216435	175604	190000	23.3%
LA	Swansea Museum - Floating Exhibits	SW	MAG	7035	11283	0	-37.6%
LA	The Oriel Myrddin Gallery	SW	MAG	21261	25000		-15.0%
LA	The Tramshed	SW	MAG	167257	7574	0	2108.3%
PO	Usk Castle	SE	HP	6102			
PO	Wales Millennium Centre	SE	MAG	1053352	1119344	882962	-5.9%
LA	Wrexham County Borough Museum	N	MAG	15057	14360	14806	4.9%

10. List of Attractions by Region (alphabetical order)

10.1 Attractions located in Mid Wales

Owner	Name	Category	2009	2008	2007	09/08	£ adult
PO	Bwlch Nant yr Arian Visitor Centre	CP	125000 *				
PO	Devil's Bridge Waterfalls	CP	39155				£3.50
PO	Elan Valley Visitor Centre	CP	166003 *				
PO	Glansevern Hall Gardens	CP	3487	4055	4430	-14.0%	£5.00
PO	Shared Earth Trust, Denmark Farm	CP	2013	1000		101.3%	
PO	Hergest Croft Gardens	CP	11247	10444		7.7%	£6.00
PO	Brecon Cathedral and Heritage Centre	HP	30000 *				
Cadw	Harlech Castle	HP	94340	85659	94043	10.1%	£3.60
NT	Llanerchaeron	HP	32269	32153	0	0.4%	£6.90
NT	Powis Castle & Garden	HP	98141	98022	102375	0.1%	£11.00
LA	Senedd-Dy Owain Glyndwr	HP	2059 *	3000	0	-31.4%	£1.50
Cadw	Strata Florida Abbey	HP	4826	3441	3442	40.2%	£3.00
Cadw	Tretower Court & Castle	HP	0	9843	12911	100.0%	£3.00
PO	Judge's Lodging	HP	9890	10367	14019	-4.6%	£5.50
PO	Centre for Alternative Technology	Ind	53031				£8.40
PO	Llywernog Silver Lead Mine	Ind	6452				£7.50
PO	Abergavenny Museum & Castle	MAG	26791 *	19205	0	39.5%	
LA	Brecknock Museum & Art Gallery	MAG	20169	19257	16290	4.7%	£1.00
LA	Bronze Bell Collection (Sailors Institute)	MAG	6500 *	7500	9000	-13.3%	
LA	Ceredigion Museum	MAG	34688	35010	37485	-0.9%	
LA	Llanidloes Museum	MAG	2967	3157	16290	-6.0%	
LA	Newtown Textile Museum	MAG	1111	1862	0	-40.3%	£1.00
PO	Old Bell Museum	MAG	2331	1926	2023	21.0%	£1.00
PO	Portmeirion	MAG	249815	216672	223271	15.3%	£7.50
LA	Powysland Museum & Montgomery Canal C'tr	MAG	7849	8804	7363	-10.8%	£1.00
PO	The Regimental Museum of the Royal Welsh	MAG	15693	15326	15961	2.4%	£3.00
PO	Offa's Dyke Centre	MAG	18022				
Cadw	Machinations	MAG		10444	6918	100.0%	
PO	CARAD Chronicles Community Museum	MAG	887 *				£3.00
PO	Canolfan Y Plase	MAG	2000 *	2000	3000	0.0%	
PO	Barmouth Sailors' Institute & Ty Gwyn	MAG	6250 *	5500	4500	13.6%	
PO	Internal Fire, Museum of Power	MAG	5500	6500	0	-15.4%	£4.75
PO	Black Mountain Activities	Other	12427				£0.65
PO	Aberystwyth Cliff Electric Railway	R/T	58387 *	46635	53176	25.2%	£3.20
PO	Bala Lake Railway	R/T	19626 *				£8.50
PO	Talylyn Railway	R/T	47227	46527	50426	1.5%	£12.50
PO	Teifi Valley Railway	R/T	17991 *	18706	18684	-3.8%	£6.00
PO	Vale of Rheidol Railway	R/T	38763	35232	0	10.0%	£13.50
PO	The Playbarn	Theme	28000 *				£0.00
PO	The Animalarium	WL	35510 *	35983	29000	-1.3%	£8.00
PO	Magic of Life Butterfly House	WL	10309				£5.95
PO	Cantref Adventure Farm	WL	41200	49500		-16.8%	£7.50

10.2 Attractions located in North Wales

Owner	Name	Category	2009	2008	2007	09/08	£ adult
NT	Bodnant Garden	CP	149036	138313	151973	7.8%	£7.50
PO	Conwy Nature Reserve	CP	96193	86145	0	11.7%	£2.50
PO	Llyn Brenig Visitor Centre	CP	186242	* 157029	0	18.6%	
LA	Padarn Country Park	CP	109942	*			
PO	Gypsy Wood Park	CP	11209	7400	8663	51.5%	£5.25
PO	Glasfryn Parc	CP	27304	*			
NT	Aberconwy House	HP	16009	16009	18031	0.0%	£3.00
Cadw	Beaumaris Castle	HP	78231	67329	81638	16.2%	£3.60
LA	Beaumaris Gaol	HP	10234	9383	10972	9.1%	
Cadw	Caernarfon Castle	HP	193683	174964	192520	10.7%	£4.95
NT	Chirk Castle	HP	94353	94647	108892	-0.3%	£9.20
Cadw	Conwy Castle	HP	181947	163668	176344	11.2%	£4.60
NT	Conwy Suspension Bridge	HP	13411	13411	13702	0.0%	£1.00
Cadw	Criccieth Castle	HP	37196	34213	39066	8.7%	£3.00
Cadw	Denbigh Castle	HP	10731	9675	7734	10.9%	£3.00
NT	Erddig	HP	109960	108234	115103	1.6%	£9.80
NT	Penrhyn Castle	HP	186875	187271	212432	-0.2%	£9.00
Cadw	Plas Mawr Elizabethan Town House	HP	30086	25075	26352	20.0%	£4.95
NT	Plas Newydd	HP	73455	74589	66932	-1.5%	£8.25
LA	Plas Newydd	HP	11281	9026	8687	25.0%	£3.50
NT	Plas-yn-Rhiw	HP	13322	13366	0	-0.3%	£4.00
Cadw	Rhuddlan Castle	HP	25215	19391	18478	30.0%	£3.00
Cadw	Rug Chapel	HP	4353	3599	0	21.0%	£3.60
NT	Ty Mawr Wybrnant	HP	5199	5199	0	0.0%	£3.00
Cadw	Valle Crucis Abbey	HP	9676	7964	7598	21.5%	£2.60
LA	Ruthin Gaol	HP	10575	10134	10299	4.4%	£3.50
LA	Beaumaris Court House	HP	3006	2743	3696	9.6%	
NT	Toll House	HP	15398	13402	0	14.9%	£1.00
LA	Nantclwyd-Y-Dre	HP	3325	*			£3.60
Cadw	Dolwyddelan Castle	HP	4387	3540		23.9%	£2.60
PO	Bodrhyddan Hall	HP	2940	* 782		276.0%	£5.00
PO	Electric Mountain	Ind	200000	* 220000	200000	-9.1%	£7.50
PO	Great Orme Mines	Ind	29223	30185	29767	-3.2%	£6.00
PO	Inigo Jones Slateworks	Ind	27250	24890	29210	9.5%	£4.50
PO	Llechweidd Slate Caverns	Ind	99168	102620	99757	-3.4%	£9.65
LA	Llynnon Mill	Ind	8465	8781	0	-3.6%	
LA	Minera Country Park & Iron Works	Ind	1640	1533	0	7.0%	
PO	Piggery Pottery	Ind					
PO	South Stack Lighthouse	Ind	18428	12189	0	51.2%	
PO	GreenWood Forest Park	Ind	135646				£9.80
LA	Bersham Ironworks	Ind	2510	2028	0	23.8%	
LA	Bersham Heritage Centre	MAG	8668	7298	0	18.8%	
LA	Bodelwyddan Castle	MAG	34555	39472	0	-12.5%	£5.50
PO	Caernarfon Air World	MAG	6090	* 5000	9000	21.8%	£6.50
PO	Caernarfon Maritime Museum	MAG	1282	1090	1001	17.6%	£1.00
LA	Gwynedd Museum and Art Gallery	MAG	12212	12489	0	-2.2%	
PO	Llangollen Motor Museum	MAG	5845	5257	5491	11.2%	£3.50
PO	Neuadd Goffa Ceiriog	MAG	100	* 50	0	100.0%	
LA	Quarry Hospital Visitor Centre	MAG	16623				
G	National Slate Museum	MAG	136144	122926	131555	10.8%	
LA	Wrexham County Borough Museum	MAG	15057	14360	14806	4.9%	
PO	Holyhead Maritime Museum	MAG	15000	* 9000	0	66.7%	£3.50
LA	Rhyl Library, Museum & Arts Centre	MAG	22233	* 28753	0	-22.7%	
PO	North Wales Visitor Centre	MAG	1184				
PO	Cae Dai Trust Museum	MAG	3050				£3.50
PO	Oriel Plas Glyn-Y-Weddw	MAG	81089				
PO	Horse Drawn Boat Trips	Other	115985	*			£5.00
PO	Ffestiniog Railway	R/T	131767	115985	124136	13.6%	£17.95

Owner	Name	Category	2009	2008	2007	09/08	£ adult
LA	Great Orme Tramway	R/T	147382	146559	15229	0.6%	£5.40
PO	Llanberis Lake Railway	R/T	80997 *	70000	61821	15.7%	£6.90
PO	Snowdon Mountain Railway	R/T	157570	123703	126732	27.4%	£25.00
PO	Welsh Highland Railway	R/T	72159				£25.00
PO	Rhyl Miniature Railway	R/T	9005	9192	9500	-2.0%	£2.00
PO	Welsh Highland Heritage Railway	R/T	21942	22196	19512	-1.1%	£5.50
LA	Rhyl Suncentre	Theme	92897	148871	112899	-37.6%	
LA	Sky Tower	Theme	20585	17103	0	20.4%	
PO	Llandudno Ski and Snowboard Centre	Theme	105458 *				£13.00
PO	Anglesey Sea Zoo	WL	80533	85000	0	-5.3%	£7.25
LA	Moelfre Seawatch	WL	16844	17734	20024	-5.0%	

10.3 Attractions located in South West Wales

Owner	Name	Category	2009	2008	2007	09/08	£ adult
NT	Aberdulais Falls	CP	20267	21261	23654	-4.7%	£4.00
PO	Aberglasney Gardens	CP	44625	47535	47131	-6.1%	£7.00
NT	Colby Woodland Garden	CP	28377	27836	31199	1.9%	£4.20
LA	Gelli Aur Country Park	CP	130284 *	126076	0	3.3%	
LA	Gnoll Estate	CP	170051	153846	0	10.5%	
PO	Hywel Dda Gardens & Interpretive Centre	CP	730 *	1068	0	-31.6%	
LA	Llyn Llech Owain Country Park	CP	149000 *	147757	0	0.8%	
PO	Llysyfran Reservoir Country Park	CP	109607 *	94510	94504	16.0%	
LA	Margam Country Park	CP	203800	154006	0	32.3%	£1.95
PO	National Botanic Garden of Wales	CP	113802	118747	155000	-4.2%	
PO	National Showcaves Centre for Wales	CP	86963	83117	81414	4.6%	£12.00
NT	Newton House, Dinefwr Park & Castle	CP	47577	46250	38000	2.9%	£6.30
LA	Pembrey Country Park	CP	435354 *	401439	439854	8.4%	
LA	Plantasia	CP	88970	90397	0	-1.6%	
PO	Craig-y-Nos Country Park	CP	79831 *	87281	0	-8.5%	
PO	Heatherton Country Sports Park	CP	206000 *				
PO	Old Cilgwyn Gardens	CP	200				£2.00
LA	Clyne Gardens	CP	388427	417638	0	-7.0%	
LA	Singleton Park & Botanical Gardens	CP	56513	59066	0	-4.3%	
LA	Afan Forest Park Visitor Centre	CP	650000 *	112883	137500	475.8%	
PO	Brecon Beacons Geopark Visitor Centre	CP	17806 *				
LA	Bishop's Wood Nature Reserve & Centre	CP	10000 *				£0.00
LA	Clyne Valley Country Park	CP	388427				
LA	Carew Castle & Tidal Mill	HP	37413	34850	39690	7.4%	£3.90
Cadw	Carreg Cennen Castle	HP	28421	24590	27704	15.6%	£3.60
LA	Castell Henllys Iron Age Fort	HP	29484	28949	27770	1.8%	£3.90
Cadw	Kidwelly Castle	HP	28457	24600	27625	15.7%	£3.00
Cadw	Lamphey Bishop's Palace	HP	4122	524	2231	686.6%	£3.00
Cadw	Laugharne Castle	HP	12540	9685	10666	29.5%	£3.00
Cadw	Oxwich Castle	HP	8661	8174	7518	6.0%	£2.60
PO	Pembroke Castle	HP	85201	81706	82403	4.3%	£3.50
Cadw	St Davids Bishops Palace	HP	26288	22746	23240	15.6%	£3.00
NT	Tudor Merchant's House	HP	19283	19705	17633	-2.1%	£2.70
PO	Penrhos Cottage	HP	50000 *				£2.00
NT	Dolaucothi Gold Mines	Ind	19825	19765	0	0.3%	£3.40
PO	Melin Tregwynt	Ind	30000 *	40000	25000	-25.0%	
PO	National Coracle Centre & Flour Mill	Ind	4100	4946	4909	-17.1%	£3.00
PO	Pembrokeshire Candle Centre & Museum	Ind	8300 *	8843	8500	-6.1%	
PO	The Welsh Chocolate Farm	Ind	25000 *				£4.25
PO	Glyn-Coch Craft Centre & Farm	Ind	5000	3000	0	66.7%	
PO	Solva Woollen Mill	Ind	14027 *	11728	11000	19.6%	
LA	Carmarthenshire County Museum	MAG	12889	14030	13837	-8.1%	
LA	Cefn Coed Colliery Museum	MAG	9259	10029	9686	-7.7%	
LA	Glynn Vivian Art Gallery	MAG	43741				
LA	Kidwelly Industrial Museum	MAG	3240	3391	2924	-4.5%	
LA	Museum of Speed	MAG	33522	37749	30759	-11.2%	
G	National Wool Museum	MAG	26970	24347	21478	10.8%	
LA	Neath Museum	MAG	2701	3279	2960	-17.6%	
LA	Parc Howard Museum and Art Gallery	MAG	13876	13045	0	6.4%	
LA	Swansea Museum	MAG	216435	175604	190000	23.3%	
LA	Dylan Thomas Centre	MAG	102392				
G	National Waterfront Museum	MAG	257888	228760	246312	12.7%	
PO	1940's Swansea Bay	MAG	8616	7050	7030	22.2%	£4.99
PO	Rhossili Gallery	MAG	4650 *				£0.00
PO	Carew Cheriton Control Tower	MAG	1100 *				
PO	Pembroke Dock Museum	MAG	6336				£2.00
LA	The Tramshed	MAG	167257	7574	0	2108.3%	

Owner	Name	Category	2009	2008	2007	09/08	£ adult
LA	Swansea Museum - Floating Exhibits	MAG	7035	11283	0	-37.6%	
LA	The Oriel Myrddin Gallery	MAG	21261	25000		-15.0%	
PO	West Wales Museum of Childhood	MAG	6148	6330		-2.9%	£5.00
PO	Neath Canal Boat Trips	Other	0	*			£4.00
LA	Aquadome, Afan Lido Leisure Complex	Theme	264208				
PO	Phoenix Bowl	Theme	15000				£0.00
PO	The LC	Theme	597276	451138		32.4%	£7.00
PO	WWT National Wetland Centre Wales	WL	46529	48069	50575	-3.2%	£7.30
PO	Pembrokeshire Sheepdogs	WL	2500	*			£5.00
LA	Shearwater Safari	WL	638				£30.10
LA	Blackpill Wildlife Centre	WL	200	*	420	0	-52.4%

10.4 Attractions located in South East Wales

Owner	Name	Category	2009	2008	2007	09/08	£ adult
LA	Bryngarw Country Park	CP	50800				
LA	Cosmeston Lakes Country Park	CP	210000	*			
LA	Cosmeston Medieval Village	CP	18980	*			
LA	Dare Valley Country Park	CP	74501	80558	0	-7.5%	
LA	Dyffryn Gardens	CP	49398	39919	35416	23.7%	£6.00
LA	Fourteen Locks Canal Centre	CP	41957	20260	0	107.1%	
LA	Old Station	CP	100000	96000	85000	4.2%	
LA	Porthkerry Country Park	CP	80000	*			
PO	Parva Farm Vineyard	CP	5400	*			
LA	Flat Holm	CP	2582				
PO	Cowbridge Physic Garden	CP	80000	*			
PO	Newport Wetlands	CP	60000	*			
LA	Kenfig Nature Reserve	CP	13537				
Cadw	Blaenavon Ironworks	HP	29961	18677	8361	60.4%	
Cadw	Caerleon Roman Baths and Amphitheatre	HP	49792	40555	45009	22.8%	
Cadw	Caerphilly Castle	HP	88772	83167	107048	6.7%	£3.60
LA	Cardiff Castle	HP	221716	221903	223792	-0.1%	
Cadw	Castell Coch	HP	71745	68544	65637	4.7%	£3.60
Cadw	Chepstow Castle	HP	57899	60742	64637	-4.7%	£3.60
PO	Folly Tower	HP	1250	1116	23975	12.0%	
PO	Llandaff Cathedral	HP	40854	47316	37028	-13.7%	
Cadw	Raglan Castle	HP	59008	50873	55545	16.0%	£3.00
Cadw	Tintern Abbey	HP	68259	60911	71785	12.1%	£3.60
Cadw	White Castle	HP	11701	7478	8452	56.5%	£2.60
PO	Monmouth Castle & Regimental Museum	HP	4085	4310	4889	-5.2%	
PO	Shell Grotto	HP	1587	1303	0	21.8%	
NT	Kymin (The)	HP	2822	3824	0	-26.2%	£2.30
PO	Usk Castle	HP	6102				
PO	Goleulong 2000 Lightship	HP	122280	*			
PO	National Assembly Debating Chamber	HP	127063	139925	204110	-9.2%	
PO	Norwegian Church	HP	134645	120408	40000	11.8%	
Cadw	Weobley Castle	HP	4858	4714	4770	3.1%	£2.60
LA	Cardiff Bay Visitor Centre	Ind	170572	193070	196764	-11.7%	
G	Big Pit: National Coal Museum	MAG	164696	165151	155569	-0.3%	
LA	Caldicot Castle	MAG	27513	26582	0	3.5%	£3.75
LA	Cyfarthfa Castle Museum	MAG	75570	75924	68148	-0.5%	
LA	Joseph Parry's Ironworkers Cottage	MAG	1200	12645	1772	-90.5%	
LA	Monmouth Museum	MAG	21343	22643	23274	-5.7%	
G	St Fagans: National History Museum	MAG	628804	617979	642289	1.8%	
G	National Museum Wales	MAG	373191	325716	353079	14.6%	
LA	Newport Museum & Art Gallery	MAG	49072	59077	56369	-16.9%	
PO	Pontypool Museum	MAG	28435				£2.90
LA	Pontypridd Museum	MAG	16230	26708	9748	-39.2%	£2.00
PO	Porthcawl Museum	MAG	824				
LA	Rhondda Heritage Park	MAG	49304	45274	0	8.9%	
G	National Roman Legion Museum	MAG	64766	64192	63458	0.9%	
PO	Techniquet	MAG	171366	188518	178366	-9.1%	
PO	Usk Rural Life Museum	MAG	3800	3597	3690	5.6%	£2.00
PO	Blaenavon Community Heritage & Cordell Museum	MAG	1287	949	1216	35.6%	£1.00
PO	Abertillery & District Museum	MAG	5500	11430	10594	-51.9%	
LA	Butetown History & Arts Centre	MAG	4874				
LA	Cardiff Visitor Centre	MAG	300451				
PO	Wales Millennium Centre	MAG	1053352	1119344	882962	-5.9%	
PO	Blaina Museum & Heritage Centre	MAG	4073	3766	3820	8.2%	
PO	Bay Island Voyages	Other	7295	7618	10000	-4.2%	£18.00
PO	Brecon Mountain Railway	R/T	69467	63096	70422	10.1%	£9.50
PO	Griffithstown Railway Museum	R/T	1082	*			

Owner	Name	Category	2009	2008	2007	09/08	£ adult
LA	Bridgend Recreation Centre	Theme	451934				
LA	Doctor Who Exhibition	Theme	82275				
LA	Greenmeadow Community Farm	WL	48521	50384	41975	-3.7%	£4.50

11. Lists of Attractions by Attraction Category (alphabetical order)

11.1 Historic Property

Owner	Name	Region	2009	2008	2007	09/08	£ adult	
NT	Aberconwy House	N	16009	16009	18031	0.0%	£3.00	
Cadw	Beaumaris Castle	N	78231	67329	81638	16.2%	£3.60	
LA	Beaumaris Court House	N	3006	2743	3696	9.6%		
LA	Beaumaris Gaol	N	10234	9383	10972	9.1%		
Cadw	Blaenavon Ironworks	SE	29961	18677	8361	60.4%		
PO	Bodrhuddan Hall	N	2940	*	782	276.0%	£5.00	
PO	Brecon Cathedral and Heritage Centre	M	30000	*				
Cadw	Caerleon Roman Baths and Amphitheatre	SE	49792	40555	45009	22.8%		
Cadw	Caernarfon Castle	N	193683	174964	192520	10.7%	£4.95	
Cadw	Caerphilly Castle	SE	88772	83167	107048	6.7%	£3.60	
LA	Cardiff Castle	SE	221716	221903	223792	-0.1%		
LA	Carew Castle & Tidal Mill	SW	37413	34850	39690	7.4%	£3.90	
Cadw	Carreg Cennen Castle	SW	28421	24590	27704	15.6%	£3.60	
Cadw	Castell Coch	SE	71745	68544	65637	4.7%	£3.60	
LA	Castell Henllys Iron Age Fort	SW	29484	28949	27770	1.8%	£3.90	
Cadw	Chepstow Castle	SE	57899	60742	64637	-4.7%	£3.60	
NT	Chirk Castle	N	94353	94647	108892	-0.3%	£9.20	
Cadw	Conwy Castle	N	181947	163668	176344	11.2%	£4.60	
NT	Conwy Suspension Bridge	N	13411	13411	13702	0.0%	£1.00	
Cadw	Criccieth Castle	N	37196	34213	39066	8.7%	£3.00	
Cadw	Denbigh Castle	N	10731	9675	7734	10.9%	£3.00	
Cadw	Dolwyddelan Castle	N	4387	3540		23.9%	£2.60	
NT	Erddig	N	109960	108234	115103	1.6%	£9.80	
PO	Folly Tower	SE	1250	1116	23975	12.0%		
PO	Goleulong 2000 Lightship	SE	122280	*				
Cadw	Harlech Castle	M	94340	85659	94043	10.1%	£3.60	
PO	Judge's Lodging	M	9890	10367	14019	-4.6%	£5.50	
Cadw	Kidwelly Castle	SW	28457	24600	27625	15.7%	£3.00	
NT	Kymin (The)	SE	2822	3824	0	-26.2%	£2.30	
Cadw	Lamphey Bishop's Palace	SW	4122	524	2231	686.6%	£3.00	
Cadw	Laugharne Castle	SW	12540	9685	10666	29.5%	£3.00	
PO	Llandaff Cathedral	SE	40854	*	47316	37028	-13.7%	
NT	Llanerchaeron	M	32269	32153	0	0.4%	£6.90	
PO	Monmouth Castle & Regimental Museum	SE	4085	4310	4889	-5.2%		
LA	Nantclwyd-Y-Dre	N	3325	*			£3.60	
PO	National Assembly Debating Chamber	SE	127063	139925	204110	-9.2%		
PO	Norwegian Church	SE	134645	*	120408	40000	11.8%	
Cadw	Oxwich Castle	SW	8661	8174	7518	6.0%	£2.60	
PO	Pembroke Castle	SW	85201	81706	82403	4.3%	£3.50	
PO	Penrhos Cottage	SW	50000	*			£2.00	
NT	Penrhyn Castle	N	186875	187271	212432	-0.2%	£9.00	
Cadw	Plas Mawr Elizabethan Town House	N	30086	25075	26352	20.0%	£4.95	
NT	Plas Newydd	N	73455	74589	66932	-1.5%	£8.25	
LA	Plas Newydd	N	11281	9026	8687	25.0%	£3.50	
NT	Plas-yn-Rhiw	N	13322	13366	0	-0.3%	£4.00	
NT	Powis Castle & Garden	M	98141	98022	102375	0.1%	£11.00	
Cadw	Raglan Castle	SE	59008	50873	55545	16.0%	£3.00	
Cadw	Rhuddlan Castle	N	25215	19391	18478	30.0%	£3.00	
Cadw	Rug Chapel	N	4353	3599	0	21.0%	£3.60	
LA	Ruthin Gaol	N	10575	10134	10299	4.4%	£3.50	
LA	Senedd-Dy Owain Glyndwr	M	2059	*	3000	0	-31.4%	£1.50
PO	Shell Grotto	SE	1587	1303	0	21.8%		
Cadw	St Davids Bishops Palace	SW	26288	22746	23240	15.6%	£3.00	
Cadw	Strata Florida Abbey	M	4826	3441	3442	40.2%	£3.00	

Owner	Name	Region	2009	2008	2007	09/08	£ adult
Cadw	Tintern Abbey	SE	68259	60911	71785	12.1%	£3.60
NT	Toll House	N	15398	13402	0	14.9%	£1.00
						-	
Cadw	Tretower Court & Castle	M	0	9843	12911	100.0%	£3.00
NT	Tudor Merchant's House	SW	19283	19705	17633	-2.1%	£2.70
NT	Ty Mawr Wybrnant	N	5199	5199	0	0.0%	£3.00
PO	Usk Castle	SE	6102				
Cadw	Valle Crucis Abbey	N	9676	7964	7598	21.5%	£2.60
Cadw	Weobley Castle	SE	4858	4714	4770	3.1%	£2.60
Cadw	White Castle	SE	11701	7478	8452	56.5%	£2.60

11.2 Museum or Art Gallery

Owner	Name	Region	2009	2008	2007	09/08	£ adult
PO	1940's Swansea Bay	SW	8616	7050	7030	22.2%	£4.99
PO	Abergavenny Museum & Castle	M	26791 *	19205	0	39.5%	
PO	Abertillery & District Museum	SE	5500 *	11430	10594	-51.9%	
PO	Barmouth Sailors' Institute & Ty Gwyn	M	6250 *	5500	4500	13.6%	
LA	Bersham Heritage Centre	N	8668	7298	0	18.8%	
G	Big Pit: National Coal Museum	SE	164696	165151	155569	-0.3%	
PO	Blaenavon Community Heritage & Cordell Museum	SE	1287	949	1216	35.6%	£1.00
PO	Blaina Museum & Heritage Centre	SE	4073 *	3766	3820	8.2%	
LA	Bodelwyddan Castle	N	34555	39472	0	-12.5%	£5.50
LA	Brecknock Museum & Art Gallery	M	20169	19257	16290	4.7%	£1.00
LA	Bronze Bell Collection (Sailors Institute)	M	6500 *	7500	9000	-13.3%	
LA	Butetown History & Arts Centre	SE	4874				
PO	Cae Dai Trust Museum	N	3050				£3.50
PO	Caernarfon Air World	N	6090 *	5000	9000	21.8%	£6.50
PO	Caernarfon Maritime Museum	N	1282	1090	1001	17.6%	£1.00
LA	Caldicot Castle	SE	27513	26582	0	3.5%	£3.75
PO	Canolfan Y Plase	M	2000 *	2000	3000	0.0%	
PO	CARAD Chronicles Community Museum	M	887 *				£3.00
LA	Cardiff Visitor Centre	SE	300451				
PO	Carew Cheriton Control Tower	SW	1100 *				
LA	Carmarthenshire County Museum	SW	12889	14030	13837	-8.1%	
LA	Cefn Coed Colliery Museum	SW	9259	10029	9686	-7.7%	
LA	Ceredigion Museum	M	34688	35010	37485	-0.9%	
LA	Cyfarthfa Castle Museum	SE	75570	75924	68148	-0.5%	
LA	Dylan Thomas Centre	SW	102392				
LA	Glynn Vivian Art Gallery	SW	43741				
LA	Gwynedd Museum and Art Gallery	N	12212	12489	0	-2.2%	
PO	Holyhead Maritime Museum	N	15000 *	9000	0	66.7%	£3.50
PO	Internal Fire, Museum of Power	M	5500	6500	0	-15.4%	£4.75
LA	Joseph Parry's Ironworkers Cottage	SE	1200	12645	1772	-90.5%	
LA	Kidwelly Industrial Museum	SW	3240	3391	2924	-4.5%	
PO	Llangollen Motor Museum	N	5845	5257	5491	11.2%	£3.50
LA	Llanidloes Museum	M	2967	3157	16290	-6.0%	
Cadw	Machinations	M		10444	6918	-100.0%	
LA	Monmouth Museum	SE	21343	22643	23274	-5.7%	
LA	Museum of Speed	SW	33522	37749	30759	-11.2%	
G	National Museum Wales	SE	373191	325716	353079	14.6%	
G	National Roman Legion Museum	SE	64766	64192	63458	0.9%	
G	National Slate Museum	N	136144	122926	131555	10.8%	
G	National Waterfront Museum	SW	257888	228760	246312	12.7%	
G	National Wool Museum	SW	26970	24347	21478	10.8%	
LA	Neath Museum	SW	2701	3279	2960	-17.6%	
PO	Neuadd Goffa Ceiriog	N	100 *	50	0	100.0%	
LA	Newport Museum & Art Gallery	SE	49072	59077	56369	-16.9%	
LA	Newtown Textile Museum	M	1111	1862	0	-40.3%	£1.00
PO	North Wales Visitor Centre	N	1184				
PO	Offa's Dyke Centre	M	18022				
PO	Old Bell Museum	M	2331	1926	2023	21.0%	£1.00
PO	Oriel Plas Glyn-Y-Wedd	N	81089				
LA	Parc Howard Museum and Art Gallery	SW	13876	13045	0	6.4%	
PO	Pembroke Dock Museum	SW	6336				£2.00
PO	Pontypool Museum	SE	28435				£2.90
LA	Pontypridd Museum	SE	16230	26708	9748	-39.2%	£2.00
PO	Porthcawl Museum	SE	824				
PO	Portmeirion	M	249815	216672	223271	15.3%	£7.50

Owner	Name	Region	2009	2008	2007	09/08	£ adult
LA	Powysland Museum & Montgomery Canal C'tr	M	7849	8804	7363	-10.8%	£1.00
LA	Quarry Hospital Visitor Centre	N	16623				
LA	Rhondda Heritage Park	SE	49304	45274	0	8.9%	
PO	Rhossili Gallery	SW	4650 *				£0.00
LA	Rhyl Library, Museum & Arts Centre	N	22233 *	28753	0	-22.7%	
G	St Fagans: National History Museum	SE	628804	617979	642289	1.8%	
LA	Swansea Museum	SW	216435	175604	190000	23.3%	
LA	Swansea Museum - Floating Exhibits	SW	7035	11283	0	-37.6%	
PO	Techniquest	SE	171366	188518	178366	-9.1%	
LA	The Oriel Myrddin Gallery	SW	21261	25000		-15.0%	
PO	The Regimental Museum of the Royal Welsh	M	15693	15326	15961	2.4%	£3.00
LA	The Tramshed	SW	167257	7574	0	2108.3%	
PO	Usk Rural Life Museum	SE	3800 *	3597	3690	5.6%	£2.00
PO	Wales Millennium Centre	SE	1053352	1119344	882962	-5.9%	
PO	West Wales Museum of Childhood	SW	6148	6330		-2.9%	£5.00
LA	Wrexham County Borough Museum	N	15057	14360	14806	4.9%	

11.3 Industrial or Craft Attraction

Owner	Name	Region	2009	2008	2007	09/08	£ adult
LA	Bersham Ironworks	N	2510	2028	0	23.8%	
LA	Cardiff Bay Visitor Centre	SE	170572	193070	196764	-11.7%	
PO	Centre for Alternative Technology	M	53031				£8.40
NT	Dolaucothi Gold Mines	SW	19825	19765	0	0.3%	£3.40
PO	Electric Mountain	N	200000 *	220000	200000	-9.1%	£7.50
PO	Glyn-Coch Craft Centre & Farm	SW	5000	3000	0	66.7%	
PO	Great Orme Mines	N	29223	30185	29767	-3.2%	£6.00
PO	GreenWood Forest Park	N	135646				£9.80
PO	Inigo Jones Slateworks	N	27250	24890	29210	9.5%	£4.50
PO	Llechwedd Slate Caverns	N	99168	102620	99757	-3.4%	£9.65
LA	Llynnon Mill	N	8465	8781	0	-3.6%	
PO	Llywernog Silver Lead Mine	M	6452				£7.50
PO	Melin Tregwynt	SW	30000 *	40000	25000	-25.0%	
LA	Minera Country Park & Iron Works	N	1640	1533	0	7.0%	
PO	National Coracle Centre & Flour Mill	SW	4100	4946	4909	-17.1%	£3.00
PO	Pembrokeshire Candle Centre & Museum	SW	8300 *	8843	8500	-6.1%	
PO	Piggery Pottery	N					
PO	Solva Woollen Mill	SW	14027 *	11728	11000	19.6%	
PO	South Stack Lighthouse	N	18428	12189	0	51.2%	
PO	The Welsh Chocolate Farm	SW	25000 *				£4.25

11.4 Country Park, Garden, other Natural

Owner	Name	Region	2009	2008	2007	09/08	£ adult
NT	Aberdulais Falls	SW	20267	21261	23654	-4.7%	£4.00
PO	Aberglasney Gardens	SW	44625	47535	47131	-6.1%	£7.00
LA	Afan Forest Park Visitor Centre	SW	650000 *	112883	137500	475.8%	
LA	Bishop's Wood Nature Reserve & Centre	SW	10000 *				£0.00
NT	Bodnant Garden	N	149036	138313	151973	7.8%	£7.50
PO	Brecon Beacons Geopark Visitor Centre	SW	17806 *				
LA	Bryngarw Country Park	SE	50800				
PO	Bwlch Nant yr Arian Visitor Centre	M	125000 *				
LA	Clyne Gardens	SW	388427	417638	0	-7.0%	
LA	Clyne Valley Country Park	SW	388427				
NT	Colby Woodland Garden	SW	28377	27836	31199	1.9%	£4.20
PO	Conwy Nature Reserve	N	96193	86145	0	11.7%	£2.50
LA	Cosmeston Lakes Country Park	SE	210000 *				
LA	Cosmeston Medieval Village	SE	18980 *				
PO	Cowbridge Physic Garden	SE	80000 *				
PO	Craig-y-Nos Country Park	SW	79831 *	87281	0	-8.5%	
LA	Dare Valley Country Park	SE	74501	80558	0	-7.5%	
PO	Devil's Bridge Waterfalls	M	39155				£3.50
LA	Dyffryn Gardens	SE	49398 *	39919	35416	23.7%	£6.00
PO	Elan Valley Visitor Centre	M	166003 *				
LA	Flat Holm	SE	2582				
LA	Fourteen Locks Canal Centre	SE	41957	20260	0	107.1%	
LA	Gelli Aur Country Park	SW	130284 *	126076	0	3.3%	
PO	Glansevern Hall Gardens	M	3487	4055	4430	-14.0%	£5.00
PO	Glasfryn Parc	N	27304 *				
LA	Gnoll Estate	SW	170051	153846	0	10.5%	
PO	Gypsy Wood Park	N	11209	7400	8663	51.5%	£5.25
PO	Heatherton Country Sports Park	SW	206000 *				
PO	Hergest Croft Gardens	M	11247	10444		7.7%	£6.00
PO	Hywel Dda Gardens & Interpretive Centre	SW	730 *	1068	0	-31.6%	
LA	Kenfig Nature Reserve	SE	13537				
PO	Llyn Brenig Visitor Centre	N	186242 *	157029	0	18.6%	
LA	Llyn Llech Owain Country Park	SW	149000 *	147757	0	0.8%	
PO	Lllysyfran Reservoir Country Park	SW	109607 *	94510	94504	16.0%	
LA	Margam Country Park	SW	203800	154006	0	32.3%	£1.95
PO	National Botanic Garden of Wales	SW	113802	118747	155000	-4.2%	
PO	National Showcaves Centre for Wales	SW	86963	83117	81414	4.6%	£12.00
PO	Newport Wetlands	SE	60000 *				
NT	Newton House, Dinefwr Park & Castle	SW	47577	46250	38000	2.9%	£6.30
PO	Old Cilgwyn Gardens	SW	200				£2.00
LA	Old Station	SE	100000 *	96000	85000	4.2%	
LA	Padarn Country Park	N	109942 *				
PO	Parva Farm Vineyard	SE	5400 *				
LA	Pembrey Country Park	SW	435354 *	401439	439854	8.4%	
LA	Plantasia	SW	88970	90397	0	-1.6%	
LA	Porthkerry Country Park	SE	80000 *				
PO	Shared Earth Trust, Denmark Farm	M	2013	1000		101.3%	
LA	Singleton Park & Botanical Gardens	SW	56513	59066	0	-4.3%	

11.5 Wildlife Attraction

Owner	Name	Region	2009	2008	2007	09/08	£ adult
PO	Anglesey Sea Zoo	N	80533	85000	0	-5.3%	£7.25
LA	Blackpill Wildlife Centre	SW	200 *	420	0	-52.4%	
PO	Cantref Adventure Farm	M	41200	49500		-16.8%	£7.50
LA	Greenmeadow Community Farm	SE	48521	50384	41975	-3.7%	£4.50
PO	Magic of Life Butterfly House	M	10309				£5.95
LA	Moelfre Seawatch	N	16844	17734	20024	-5.0%	
PO	Pembrokeshire Sheepdogs	SW	2500 *				£5.00
LA	Shearwater Safari	SW	638				£30.10
PO	The Animalarium	M	35510 *	35983	29000	-1.3%	£8.00
PO	WWT National Wetland Centre Wales	SW	46529	48069	50575	-3.2%	£7.30

11.6 Themed Attraction, Leisure Park, Centres

Owner	Name	Region	2009	2008	2007	09/08	£ adult
LA	Aquadome, Afan Lido Leisure Complex	SW	264208				
LA	Bridgend Recreation Centre	SE	451934				
LA	Doctor Who Exhibition	SE	82275				
PO	Llandudno Ski and Snowboard Centre	N	105458 *				£13.00
PO	Phoenix Bowl	SW	15000				£0.00
LA	Rhyl Suncentre	N	92897	148871	112899	-37.6%	
LA	Sky Tower	N	20585	17103	0	20.4%	
PO	The LC	SW	597276	451138		32.4%	£7.00
PO	The Playbarn	M	28000 *				£0.00

11.7 Railway or Tramway

Owner	Name	Region	2009	2008	2007	09/08	£ adult
PO	Aberystwyth Cliff Electric Railway	M	58387 *	46635	53176	25.2%	£3.20
PO	Bala Lake Railway	M	19626 *				£8.50
PO	Brecon Mountain Railway	SE	69467	63096	70422	10.1%	£9.50
PO	Ffestiniog Railway	N	131767	115985	124136	13.6%	£17.95
LA	Great Orme Tramway	N	147382	146559	15229	0.6%	£5.40
PO	Griffithstown Railway Museum	SE	1082 *				
PO	Llanberis Lake Railway	N	80997 *	70000	61821	15.7%	£6.90
PO	Rhyl Miniature Railway	N	9005	9192	9500	-2.0%	£2.00
PO	Snowdon Mountain Railway	N	157570	123703	126732	27.4%	£25.00
PO	Talylyn Railway	M	47227	46527	50426	1.5%	£12.50
PO	Teifi Valley Railway	M	17991 *	18706	18684	-3.8%	£6.00
PO	Vale of Rheidol Railway	M	38763	35232	0	10.0%	£13.50
PO	Welsh Highland Heritage Railway	N	21942	22196	19512	-1.1%	£5.50
PO	Welsh Highland Railway	N	72159				£25.00

APPENDIX 1

SURVEY QUESTIONNAIRE & LETTER (below)

Dear Colleague,

VISITS TO TOURIST ATTRACTIONS 2009 SURVEY

Each year we conduct a survey of *Visits to Tourist Attractions in Wales* to inform both industry and government bodies on trends in this sector.

We would like to take this opportunity to thank all of you who set aside the time to fill in last year's survey. Without the valuable information you supplied we would not be able to prepare such comprehensive findings.

Please find enclosed a questionnaire (or several questionnaires if you have more than one attraction) requesting information on visitor numbers and other aspects of your operation during 2009. It has been sent to you in the language requested last year by a representative from your attraction. If you would prefer to receive the survey in Welsh or bilingually, or to complete the survey online, then please let me know.

When completing the survey if you provide *estimated* visits figures please do so with caution: when a large estimated increase or decrease in numbers is returned this can skew the national figure.

We would be grateful if you could return the survey as soon as possible.

If you require any further information regarding the questionnaire or any other related issues, please do not hesitate to contact either myself or Claire Peate at Beaufort Research (tel. 029 2037 8565 / claire@beaufortresearch.co.uk) who will be managing the project on our behalf.

Many thanks in anticipation of your continued co-operation for this and future surveys.

Angharad Penny Evans
Senior Research Analyst, Visit Wales
tel. 02920 475358 (angharad.pennyevans@wales.gsi.gov.uk)

Research, Visit Wales, Brunel House, 2 Fitzalan Road, Cardiff, CF24 0UY

Key findings from last year's survey can be found on the reverse of this letter, and you can download the full 62 page report free of charge from the Visit Wales website (<http://new.wales.gov.uk/topics/tourism/research/tourisminwales/attractionssurvey/?lang=en>) or contact me for a copy to be sent to you.

Other factors: _____

2i In 2009 what percentage of visitors were from

Overseas % Wales % Rest of UK (excl. Wales) % = 100%

OPERATIONS

3a How did the attraction's **gross revenue** in 2009 compare with 2008? Up Down Similar

3b If gross revenue was up/ down – what was the percentage increase/ decrease? %

3c Which of the following facilities, if any, were available to the public on site in 2009. Catering Retail

3d What is the estimated average revenue **per visitor** in each of the categories below – excluding revenue from special events outside normal opening hours or private hire. *Please include VAT. Per visitor figure is total spend for each category divided by total visitors to your attraction overall*

Admissions (A) Donations (B) Catering (C) Retail (D) Other (E)
 £ p £ p £ p | £ p | £ p

TOTAL OVERALL AVERAGE SPEND (ie A+B+C+D+E above)
 £ p+

3e Did you make any kind of upgrade or improvements to your attraction in 2009 (excluding normal repairs and upkeep)? Yes No

3f If yes, how much money was spent (including VAT)?
 £

3g Please describe the main type of upgrade or improvements made:

3h **Did you** provide any visitor information and/or tours in the following languages in 2009? Welsh French German

3i **Do you intend to** provide any visitor information and/or tours in the following languages in 2010? Welsh French German

HUMAN RESOURCES

4a How many people were employed in any tourism-related activities in the attraction in 2009, including yourself, working owners, self-employed and/or any volunteers? *Please state numbers*

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

4b In 2009 did you have any difficulties recruiting and/or retaining staff?

Recruiting staff Yes No N/A Please give reason: _____
 Retaining staff Yes No Please give reason: _____

MARKETING

5a Compared with 2008, was expenditure on marketing activities in 2009: Up Down Similar

5b Which of the following media, if any, did you use in 2009 to promote your attraction

Involvement with Visit Wales campaigns/ brand/ brochures	<input type="checkbox"/>	Own publications/ leaflets	<input type="checkbox"/>
Regional publications produced by your Local Authority	<input type="checkbox"/>	Involvement with other promotional campaigns	<input type="checkbox"/>
National/ regional newspapers/ magazines	<input type="checkbox"/>	(please specify) _____	
National/regional websites/portals	<input type="checkbox"/>	Other (please specify) _____	<input type="checkbox"/>
Own website	<input type="checkbox"/>	Don't promote business	<input type="checkbox"/>

5c VAQAS is the Visitor Attraction Quality Assurance Service Cymru (see logo). Is the attraction:

...a VAQAS approved attraction
 ...planning on becoming VAQAS approved in 2010
 ...not VAQAS approved with no immediate plans to become so

