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Visits to Tourist Attractions in Wales 2013 Revised

Report for Visit Wales

Visits to Tourist Attractions in Wales – 2013
Research on behalf of Visit Wales

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

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Revision note:
The data for St David's Cathedral has been revised and affects a number of figures throughout the report. Figures revised on 23 September 2014.

Glossary of acronyms and how to read the tables

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

Estimates / visits figures unavailable

Figures shown in this report are given in good faith on the basis of information provided by the proprietors of attractions.

If visits figures were estimated by operators, this is indicated with an asterisk (*) following the number of visits in the tables in 2013 and 2012, at the end of the report.

Admission

If an attraction has an admission charge, the adult admission charge for high season 2013 is given. If this is not known the charge is left blank.

Abbreviations

CATEGORY	ACRONYM	EXPLANATION
Regions	M	Mid Wales
	N	North Wales
	SE	South East Wales
	SW	South West Wales
Ownership	Cadw †	Cadw (Welsh historic monuments)
	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.)
Tourist attractions	HP	Historic properties, castles, forts, historic houses, palaces, historic monuments, archaeological sites, other historic properties, heritage centres, places of worship
	Theme	Leisure parks, theme parks
	MAG	Museums and / or art galleries, science centres, technology centres
	IND	Industrial / craft attraction
	CP	Country park, garden, other natural
	WL	Wildlife attraction
	R/T	Railway / tramway
Location	C	Coastal
	R	Rural
	U	Urban
Employee type	FT	Full-time
	PT	Part-time
	UV	Unpaid volunteer

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

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

Executive summary

i. Visits 2013

- There were 12.91 million visits made to attractions in Wales participating in the survey in 2013: visits to free attractions account for 66.7% of all visits (8.61 million), while visits to paid attractions account for 33.3% (4.30 million).

- As most major attractions participate in the survey, it is estimated the total volume of visits recorded accounts well over 80% the grand total of visits to all attractions in Wales. Amongst all attractions responding to the survey, the 13 reporting 200,000 or more visitors accounted for 43.6% of all visits recorded in 2013.

- Attractions in South East Wales received the highest share of visits (38.6%), while attractions in Mid Wales received the lowest (6.2%).

- On average, each attraction responding to the survey received an average of 74.65k visits in 2013: this increased to 106.34k in South East Wales, and decreased to 28.62k in Mid Wales.

- Museums/art galleries received by far the highest proportion of visits overall (37.7%), while industrial/craft attractions received the lowest proportion (3.8%).

- Most of the visits to attractions in Wales in 2013 (42.6%) were made to privately owned attractions (3.0 million to free and 2.5 million to paid)

i. Visits 2012 – 2013

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2013 and 2012 visit figures. Please note that this section only relates to those attractions that provided data **in both years**.

- Visits to attractions in Wales increased by 0.4% between 2012 and 2013, from 10.85 million to 10.88 million.

- Free attractions saw an increase in visit numbers of 18.5% (2.33 million to 2.75 million). However, visits to paid attractions decreased by 4.6% (8.53 million to 8.13 million).

- North Wales and South West Wales saw an increase in visits to attractions (both paid and free) increased in 2013 compared to 2012 (+1.4% and +1.3% respectively). In other regions, visitor numbers decreased.

- Country parks saw the greatest increase in visit numbers between 2012 and 2013 (+11.2%), while industrial/craft attractions showed a noticeable decrease (-21.0%).

- Free attractions are somewhat less susceptible to seasonal variations in visit numbers compared to paid attractions; while visits to free attractions peak in July and August (as do visits to paid attractions), the monthly differences across the rest of the year are less marked than is seen for paid attractions.

- Themed attractions demonstrate year-long appeal amongst visitors. Conversely, industrial/craft and railways/tramways have more seasonal variation in visit numbers, with Q3 accounting for around half of their annual visits.

- Average adult admission charges rose by 2.1% in 2013 to £7.25 (from £7.05 in 2012); child admission prices remain unchanged.

iii. Operations

- Comparing the information on gross revenue provided by attractions responding in both 2012 and 2013, the position is much more positive this year, despite an overall reduction in visitor numbers. In 2013, a quarter of attractions reported that their gross revenue had decreased in the past 12 months; this has dropped from 50.7% of these attractions saying the same in 2012. Moreover, 37.8% reported an increase in gross revenue (compared to 26.9% in 2012).

- There was an overall average increase in revenue of 3.4% in 2013, compared to an overall decrease of 2.8% in 2012. Wildlife attractions reported the highest increase (+26.6%): this is significantly higher than their reported increase of 1.0% in 2012.

- The average revenue generated across all types of spend and all types of attraction was £3.01 per visitor (£1.27 for free attractions and £5.39 for paid attractions).

- Overall, attractions in Mid Wales generate the highest average revenue per visitor (£4.48) and those in South Wales generate the lowest (£2.00). Looking at this by free and paid attractions, free attractions in South East wales generate the highest revenue per visitor (£1.74) compared to just 68p in South West Wales. Paid attractions in Mid Wales generate the highest revenue per visitor (£8.65) compared to £4.06 in South West Wales.

- Unpaid volunteers account for the largest proportion of employees in the sector (45.8%): 28.4% are permanent and 17.4% are seasonal. Themed attractions and railways/tramways tend to employ permanent staff, while historic properties and industrial/craft attraction employees tend to be seasonal staff.

- Since 2012 there has been a significant increase in the number of permanent unpaid volunteers and permanent part-time staff working in the sector (+78.1% and +49.3% respectively). However, seasonal part-time employee and unpaid volunteers numbers have decreased (-28.8% and 58.2% respectively).

- While most attractions did not increase their marketing expenditure in 2013 compared to 2012 (68.2%), one in five (20.0%) reported that they did. Around one in ten (11.8%) reduced marketing expenditure in 2013 compared to 2012.

- Around a third (36.6%) of attractions made upgrades/improvements in 2013 (down from 44.8% in 2012). The average spend on this was £68.2k.

iv. Visitor profile

- For all attraction types, the majority of visitors are adults (72.0%): historic properties receive the highest proportion of adult visitors (79.5%), while wildlife attractions receive the highest proportion of child visitors (37.3%).

- Around half of visitors to Welsh attractions live in Wales (51.2%); country parks and museums/art galleries tend to get a higher than average proportion of local visitors (59.4% and 59.3% respectively).

- Two in five visitors to Welsh attractions live in the rest of the UK (38.9%), while one in ten (9.9%) live abroad. Railways/tramways attract a much higher than average proportion of UK visitors (76.0%), while historic properties attract a higher than average proportion of overseas visitors (17.3%).

- Overall, 3.1% of visits to attractions are made by school children; this rises to 5.9% amongst wildlife attractions, and decreases to 1.8% of visits to museums/galleries.

- On average, attractions received 61 group bookings in 2013. Based on this information provided, railways/tramways received a considerably higher than average number of group bookings (262), whereas country parks received a lower than average number of group bookings (37).

1. Introduction

1.1 Background

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

- Determine and report visit numbers to attractions throughout Wales
- Analyse collected data on visit numbers to identify current trends
- Provide additional comparative analysis of data contained in the Survey 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 (free vs. paid).

1.2 Tourist attraction definition

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

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

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

[1] This definition impacts on the Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances" which would exclude it from this research. The venue also does not neatly fall into the above classification as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, 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.

1.3 Objectives

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

1.4 Economic and climatic background to 2013

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

Economic summary of 2013

Early on in the year there was speculation that the UK would experience a 'triple dip' into recession, but in fact there was no second dip in 2012 and economic growth strengthened steadily. By the end of the year, the UK had become one of the fastest growing large economies, leading to higher consumption, which in turn led to fears of high increases in house prices.

Unemployment levels fell and inflation levels grew by just 2.1%, however, on the whole wage levels remained unchanged. Therefore, the issues affecting households in previous years (such as high fuel prices, increases in food prices and the general rise in the cost of living) continued to impact on most UK residents. Therefore, the appeal of the 'staycation' remained strong, with the help of media promotion.

Climatic summary of 2013

There were some significant weather events throughout the UK in 2013, including an exceptionally cold spring (coldest since1962), which affected the Easter trade. In contrast, the summer proved to be exceptionally hot, with the July heat wave a marked contrast to the recent poor summers of 2007 through to 2012.

While rainfall levels were on a par with other years for the most part, May, October and December showed above average levels. Wales proved to be the wettest area of the UK in 2013, with December being one of the wettest months on record.

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). A total of 94 'early' attractions were mailed in November 2013, with a reminder two weeks after mailing for non-responders. For 'late' attractions, the mailing took place in January 201 (333 attractions), with reminders sent out two weeks after mailing for non-responders.

In addition to this, Visit Wales made independent efforts to boost response, by contacting Local Authorities, National Museum of Wales, National Trust and Cadw for visitor figures.

The survey materials were sent out in the language/s of choice in either an email or postal format. If a postal questionnaire was requested, the respondent had a pre-paid envelope for the return the completed survey.

The survey was closed in March 2014, with data entry of the responses taking place after this point.

The questionnaire was based on one 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 429 attractions believed to fit the tourist attraction definition: a decline of just 3 attractions since 2012. The response rates for this year and previous two years are given in Table 2.1 below:

Table 2.1: Response rate

	2013	2012	2011
Total attractions mailed	429	432	478
Attractions completing the survey	173 (40%)	190 (44%)	216 (45%)
Attractions unable to provide figures	10 (3%)	25 (6%)	29 (6%)
TOTAL RESPONSE RATE	**183** **(43%)**	**215** **(50%)**	**245** **(51%)**

Therefore, while the response to the survey this year was 43%, the proportion actually providing visitor figures stands at 40% (down 4% on the 2012 response rate).

Furthermore, in order to ascertain the reliability of visits figures provided, in 2013 a total of 133 operators indicated which methods they used to calculate their visits figures: results are shown in Table 2.2 below. The figures amount to more than 100% as multiple methods are mentioned by some attractions.

Table 2.2: Visitor numbers – recording method

Method used	Number of attractions	% of attractions providing data
Ticket sales and / or group booking sales	47	35.3%
Manual counting	39	29.3%
Mechanical / electronic counting	31	23.3%
Estimate made on the basis of sample count	5*	4.8%
Other **	11	8.3%

Base: 133 attractions providing data on counting methods
** Other methods include data based on turnover and visitors books

3. Top ten free and paid attractions

3.1 Top ten paid attractions

The paid attraction reporting the highest number of visitors in 2013 was The LC, based in South West Wales (712,616 visitors). This was also the most visited paid attraction in 2012, although visitor numbers have decreased by 3.3% in 2013 compared to 2012.

Two of the top ten paid attractions (Folly Farm and Welsh Mountain Zoo / Botanical Gardens) did not provide data in 2012, therefore changes to visitor numbers cannot be determined – see Table 3.1 below for more details.

Table 3.1: Top ten paid attractions 2013

	Name	Region	Category	Owner	Location	No. of visits 2013	No. of visits 2012	2013 vs. 2012	£ Adult
1	The LC	SW	THEME	PO	C	712,616	736,949	-3.3%	Not provided
2	Folly Farm Adventure Park	SW	WL	PO	R	419,614	Not provided	-	£9.50
3	Portmeirion	M	MAG	PO	R	193,240	195,276	-1.0%	£10.00
4	Margam Country Park	SW	CP	LA	R	182,055	105,329	+72.8%	Not provided
5	Conwy Castle	N	HP	Cadw	C	174,920	162,665	+7.5%	Not provided
6	Great Orme Tramway	N	R/T	LA	C	169,943	153,004	+11.1%	£6.00
7	Caernarfon Castle	N	HP	Cadw	C	163,394	176,454	-7.4%	Not provided
8	Welsh Mountain Zoo and Botanical Gardens	N	WL	PO	U	135,729	Not provided	-	£10.95
9	Greenwood Forest Park	N	IND	PO	R	134,832	110,198	+22.4%	£10.95
10	Caerphilly Castle	SE	HP	LA	U	110,687	120,273	-8.0%	Not provided

3.2 Top ten free attractions

The top ten free attractions (by visitor number) have changed very little since 2012: Wales Millennium Centre remains the most visited location, although visitor numbers have declined this year by 3.7% compared to 2012.

St Fagans and Cyfarthfa Castle Museum remain the second and third most visited free attractions, as was the case in 2012 – see Table 3.2 below for more details.

Table 3.2: Top ten free attractions 2013 (r)

	Name	Region	Category	Owner	Location	No. of visits 2013	No. of visits 2012	2013 vs. 2012
1	Wales Millennium Centre	SE	MAG	PO	U	1,102,520	1,144,628	-3.7%
2	St Fagans: National History Museum	SE	MAG	G	U	544,966	615,855	-11.5%
3	Cyfarthfa Castle Museum	SE	MAG	LA	U	524,789	545,006	-3.7%
4	National Museum Wales	SE	MAG	G	U	456,342	459,806	-0.8%
5	Pembrey Country Park	SW	CP	LA	C	367,172	388,416	-5.5%
6	Cardiff Museum Project	SE	MAG	LA	U	260,172	167,413	+55.4%
7	Cwmcarn Forest Drive & Visitor Centre	SE	CP	PO	R	257,539	203,662	+26.5%
8	St David's Cathedral	SW	HP	PO	C	255,000	258,000	-1.2%
9	National Waterfront Museum	SW	MG	G	U	253,708	267,362	-5.1%
10	Cosmeston Lakes Country Park	SE	CP	LA	U	245,000	250,000	-2.0%

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4. Comparative analysis of visits to tourist attractions 2013 / 2012

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2013 and 2012 visit figures. Please note that this section only relates to those attractions that provided data **in both years**.

4.1 Overall comparisons

Amongst those attractions responding to the survey in both years (134 in total), visit numbers increased by 0.4% between 2012 and 2013 – see Table 4.1 below.

Table 4.1: Comparison of overall yearly visit figures 2013 / 2012 (r)

Base	No. of visits 2013	No. of visits 2012	Percentage change
134	10,889,870	10,850,897	+0.4%

Base: attractions providing data in both 2013 and 2012 (134)
Revised on 23 September 2014

Analysing the data in more detail; while the number of visits to paid attractions decreased between 2012 and 2013 by 4.6%, the number of visits to free attractions increased by 18.5% - see Table 4.2 below.

Table 4.2: Comparison of overall yearly visit figures 2013 / 2012 by admission type (r)

Admission type	Base	No. of visits 2013	No. of visits 2012	Percentage change
Free	58	2,754,895	2,325,076	+18.5%
Paid	76	8,134,885	8,525,821	-4.6%
TOTAL	**134**	**10,889,870**	**10,850,897**	**+0.4%**

Base: attractions providing data in both 2013 and 2012 (134)
Revised on 23 September 2014

North Wales and South West Wales saw an increase in visits to attractions (both paid and free) increased in 2013 compared to 2012 (+1.4% and +1.3% respectively). In other regions, visitor numbers decreased – see Table 4.3 below.

Table 4.3: Comparison of overall yearly visit figures 2013 / 2012 by Wales region (r)

Wales region	Base	No. of visits 2013	No. of visits 2012	Percentage change
Mid	22	590,578	597,598	-1.2%
North	40	3,045,982	3,004,114	+1.4%
South East	36	4,614,234	4,644,444	-0.7%
South West	36	2,639,076	2,604,741	+1.3%
TOTAL	**134**	**10,889,870**	**10,850,897**	**+0.4%**

Base: attractions providing data in both 2013 and 2012 (134)

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The number of visits to country parks (+11.2%), wildlife attractions (+5.4%) and railways / tramways (+2.9%) increased between 2012 and 2013.

Visits to all other types of attractions decreased, most noticeable amongst industrial / craft attractions (-21.0%), although this figure should be treated with caution due to the small base size (8 attractions) – see Table 4.4 below.

Table 4.4: Comparison of overall yearly visitor figures 2013 / 2012 by attraction category (r)

Attraction category	Base	No. of visits 2013	No. of visits 2012	Percentage change
Historic properties	47	2,310,851	2,328,270	-0.7%
Museum / art gallery	42	4,554,077	4,656,715	-2.2%
Industrial / craft attraction	8*	310,601	393,191	-21.0%
Country park / garden / other natural	26	2,464,417	2,215,591	+11.2%
Wildlife attraction	5*	93,567	88,748	+5.4%
Themed attraction / leisure park / centre	1*	712,616	736,949	-3.3%
Railway / tramway	5*	443,741	431,433	+2.9%
TOTAL	**134**	**10,889,870**	**10,850,897**	**+0.4%**

Base: attractions providing data in both 2013 and 2012
NB VERY SMALL BASES
Revised on 23 September 2014

Looking at the data by ownership, it can be seen that with the exception of Cadw, the number of visits to all types of owners reduced between 2012 and 2013. The greatest declines are seen for Local Authority (-8.9%).

Cadw visit numbers increased slightly by 0.7% between 2012 and 2013 – see Table 4.5 below.

Table 4.5: Comparison of overall yearly visitor figures 2013 / 2012 by ownership (r)

Ownership	Base	No. of visits 2013	No. of visits 2012	Percentage change
Cadw	26	1,060,921	1,053,907	+0.7%
Government	7*	1,648,790	1,739,855	-5.2%
Local Authority	35	3,256,331	2,989,976	-8.9%
The National Trust	15	971,389	1,000,802	-2.9%
Private owner / trust	51	3,952,439	4,066,357	-2.8%
TOTAL	**134**	**10,889,870**	**10,850,897**	**+0.4%**

Base: attractions providing data in both 2013 and 2012
NB VERY SMALL BASES
Revised on 23 September 2014

4.2 Comparison of monthly visits 2013 / 2012

Looking at the proportion of total visits across each month in 2012 and 2013, it can be seen that there has been virtually no change in the distribution of visits across the year. As would be expected, July (13.0%) and August (16.0%) were the months where attractions received the highest proportions of visits in 2013 (as was the case in 2012) – see Table 4.6 below.

Table 4.6: Monthly distribution of visits 2013 / 2012 (r)

Month	% of visits 2013	% of visits 2012
January	3.8%	3.8%
February	5.4%	5.5%
March	7.0%	6.5%
April	9.1%	9.6%
May	10.8%	9.1%
June	9.4%	10.7%
July	13.0%	13.1%
August	16.0%	15.5%
September	8.6%	9.5%
October	7.9%	7.6%
November	5.0%	5.1%
December	4.0%	4.1%

Base: all attractions providing data in both 2013 and 2012 (134)
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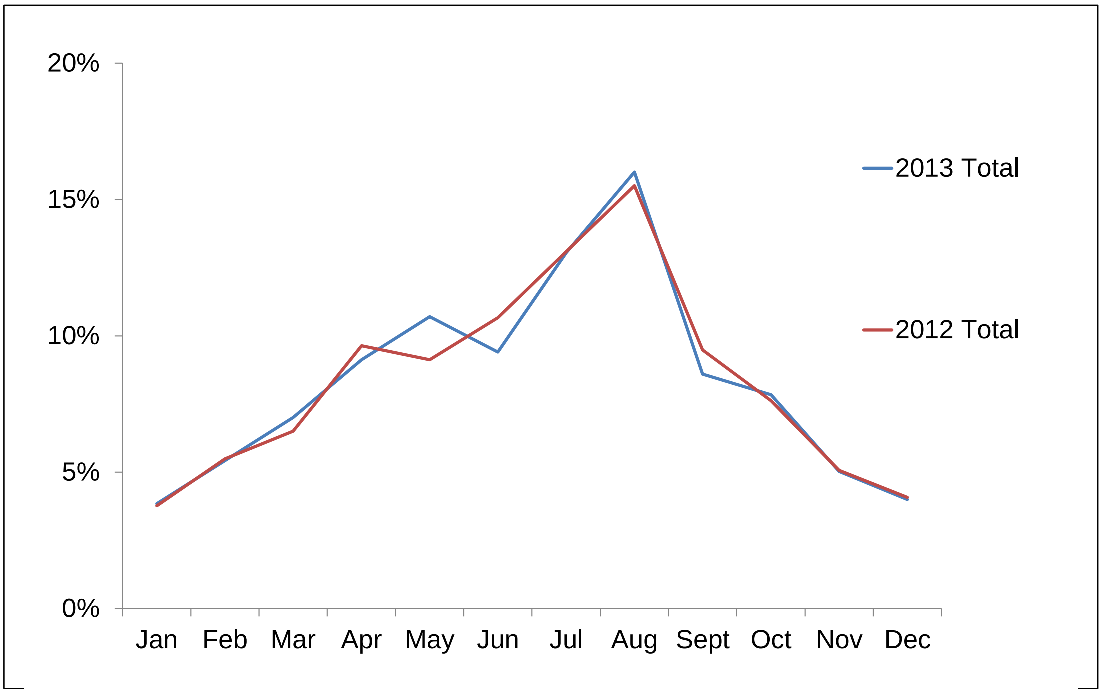
Figure 4.6a overleaf provides a visual representation of the above data, and clearly shows the peak in visit numbers during August of both 2013 and 2012.

Figure 4.6a: Chart of monthly distribution of visits 2013 / 2012



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As was seen in 2012, there is a more even distribution of visit numbers across the year for free attractions compared to paid attractions, although there is still a noticeable seasonality effect. Free attractions received the fewest visits in January and December, and the most visits in July and August. While these differences are consistent with the peaks and troughs seen for paid attractions, the differences are slightly less marked for free attractions – see Table 4.7 below.

Table 4.7: Monthly distribution of visits 2013 / 2012 by admission type (r)

Month	% of visits - free		% of visits - paid	
	2013	2012	2013	2012
January	4.2%	4.1%	3.0%	3.1%
February	5.8%	6.1%	4.4%	4.2%
March	7.5%	7.0%	5.8%	5.5%
April	9.2%	9.5%	8.8%	9.9%
May	10.6%	9.2%	11.1%	9.0%
June	9.1%	10.2%	10.1%	11.6%
July	12.6%	12.6%	14.1%	14.1%
August	14.3%	14.0%	20.2%	18.8%
September	8.5%	9.5%	8.8%	9.4%
October	8.2%	7.8%	7.2%	7.3%
November	5.5%	5.5%	3.7%	4.1%
December	4.5%	4.6%	2.9%	3.0%

Base: attractions providing data in both 2013 and 2012 – free (58); paid (76)
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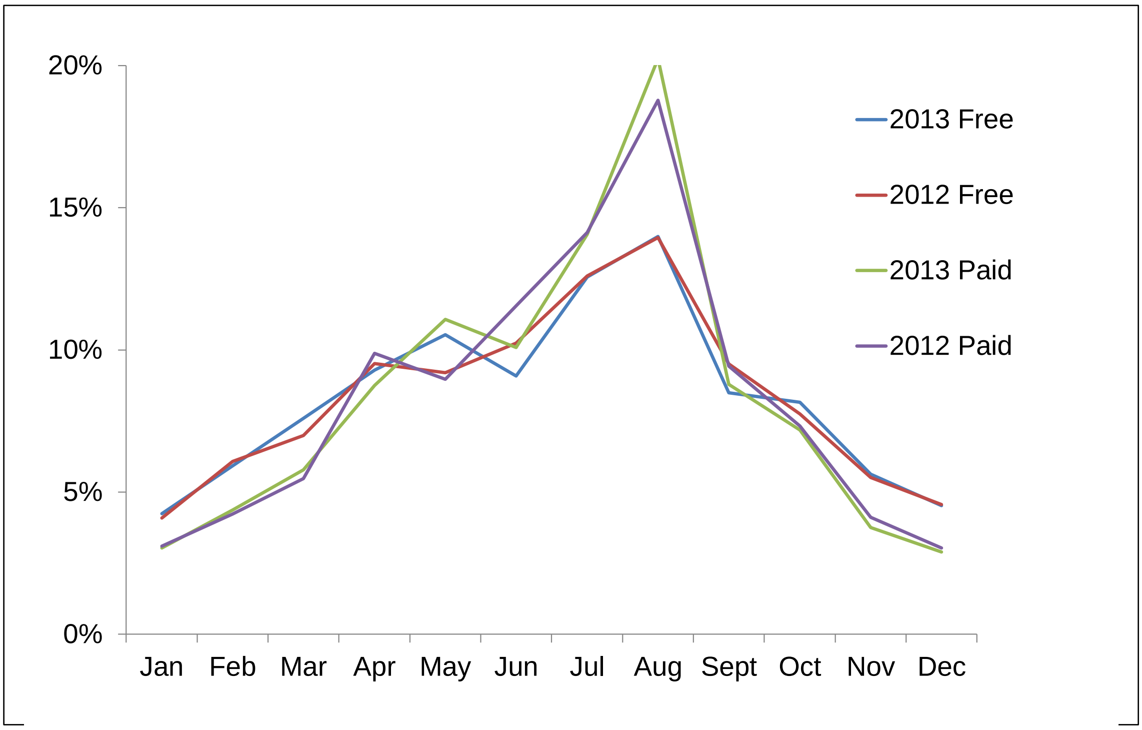
Figure 4.47a overleaf once again provides a visual representation of the above data, and shows the more marked peak in visit numbers to paid attractions during August compared to free attractions.

Figure 4.7a: Chart of monthly distribution of visits 2013 / 2012 by admission type



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4.3 Comparison of quarterly visits 2013 / 2012

Table 4.8 below illustrates the peak in visit numbers in Quarter 3 of both 2013 and 2012. Comparing the figures year on year, it can be seen that Q1 2013 showed a slight increase in visit numbers compared to 2012, while Q3 showed a slight decrease. Visit numbers for Q2 and Q4 were fairly consistent between the two years.

Table 4.8: Quarterly distribution of visits 2013 / 2012 (r)

Quarter		% of visits 2013	% of visits 2012
Q1	January – March	16.1%	15.7%
Q2	April – June	29.3%	29.4%
Q3	July – September	37.8%	38.0%
Q4	October - December	16.8%	16.7%

Base: all attractions providing data in both 2013 and 2012 (134)

The quarterly distribution of visits to attractions in South Wales (both West and East) was fairly consistent in 2013. Moreover, these two regions demonstrated the least fluctuation of visit numbers across all four quarters of the year.

Attractions in Mid Wales, however, showed the greatest degree of fluctuation across the year, with visits in Q1 accounting for only 7.4% of all annual visits (lower than for all other regions in Wales). This pattern of visit distribution is very similar to that seen in 2012 – see Table 4.9 below.

Table 4.9: Quarterly distribution of visits 2013 / 2012 by Wales region (r)

Wales region	Base	% of visits 2013				% of visits 2012				Total visits	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2013	2012
Mid	22	7.4%	32.0%	49.0%	11.5%	6.8%	33.5%	47.4%	12.3%	590,578	597,598
North	40	11.3%	31.1%	43.5%	14.1%	12.1%	31.1%	41.5%	15.3%	3,045,982	3,004,114
South East	36	19.2%	28.1%	33.5%	19.3%	18.2%	28.6%	35.4%	17.8%	4,614,234	4,644,444
South West	36	18.5%	28.6%	36.0%	17.0%	18.0%	27.8%	36.4%	17.7%	2,639,076	2,604,741
TOTAL	**134**	**16.1%**	**29.3%**	**37.8%**	**16.8%**	**15.7%**	**29.4%**	**38.0%**	**16.7%**	**10,889,870**	**10,850,897**

Base: all attractions providing data in both 2013 and 2012 (134)
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Themed attractions demonstrate year-long appeal amongst visitors. Museums, country parks and wildlife attractions had fairly similar visit numbers across each quarter, although (consistent with earlier findings), Q1 and Q4 were the slowest quarters, while Q3 was the busiest quarter.

The two types of attraction most susceptible to seasonal variation are industrial/craft attractions and railways/trams. For both of these types of attraction, Q3 saw significantly higher proportions of visits compared to other quarters (49.4% for industrial; 56.1% railways/tramways). Moreover, Q1 was the slowest quarter, accounting for relatively small proportions of visitors (8.8% for industrial; just 2.8% railways/tramways) – see Table 4.10 below.

Table 4.10: Quarterly distribution of visits 2013 / 2012 by attraction category (r)

Attraction category	Base	% of visits 2013				% of visits 2012				Total visits	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2013	2012
Historic property	47	10.5%	30.7%	44.5%	14.3%	9.5%	32.6%	42.8%	15.1%	2,310,851	2,328,270
Museum / art gallery	42	18.6%	27.4%	34.8%	19.2%	19.1%	27.2%	35.6%	18.1%	4,554,077	4,656,715
Industrial / craft attraction	8*	8.8%	30.4%	49.4%	11.3%	9.0%	29.9%	47.5%	13.6%	310,601	393,191
Country park / garden / other natural	26	17.6%	31.8%	34.7%	15.9%	16.0%	31.1%	36.6%	16.3%	2,464,417	2,215,591
Wildlife attraction	5*	17.6%	29.3%	37.8%	15.2%	17.2%	28.3%	39.4%	15.1%	93,567	88,748
Themed attraction / leisure park / centre	1*	25.5%	25.6%	28.9%	20.1%	22.8%	26.7%	30.6%	19.8%	712,616	736,949
Railway / tramway	5*	2.8%	32.9%	56.1%	8.3%	2.5%	34.5%	53.2%	9.7%	443,741	431,433
TOTAL	**134**	**16.1%**	**29.3%**	**37.8%**	**16.8%**	**15.7%**	**29.4%**	**38.0%**	**16.7%**	**10,889,870**	**10,850,897**

Base: all attractions providing data in both 2013 and 2012 (134)
NB VERY SMALL BASES
Revised on 23 September 2014

4.4 Comparison of admission charges for paid attractions

Adult admission charges for paid attractions rose slightly in 2013, from an average of £7.05 in 2012 to £7.25 (2.8% increase). Average child admission charges remained relatively unchanged – see Table 4.11 below.

Table 4.11: Comparison of adult and child average admission charges (per paid attraction) 2013 / 2012

Average admission charge	£ 2013	£ 2012	Change
Adult	£7.25	£7.05	+2.8%
Child	£4.14	£4.13	+0.2%

Base: all paid attractions providing data in both 2013 and 2012 (22)

In the UK, inflation stood at an average of 2.1% across 2013 (using the Retail Price Index). Therefore, the increases in adult admission charges represent an above-inflation rise at attractions in Wales.

There has been no change in the distribution of admission charges by charging band in 2013 compared to 2012. Table 4.12 below shows how the highest proportion of paid attractions fall into the £8.00 and over category, although please note that these figures are based on a small sample size (22) and should therefore be treated with caution.

Table 4.12: Distribution of adult admission charges by range 2013 / 2012

Average admission charge	£ 2013	£ 2012
Less than £1.00	0.0%	0.0%
£1.01 - £1.99	4.5%	4.5%
£2.00 - £2.99	4.5%	4.5%
£3.00 - £3.99	9.1%	9.1%
£4.00 - £4.99	13.6%	13.6%
£5.00 – £5.99	18.2%	18.2%
£6.00 - £6.99	18.2%	18.2%
£7.00 - £7.99	4.5%	4.5%
£8.00 and over	27.3%	27.3%

Base: all paid attractions providing data in both 2013 and 2012 (22)

5. Visits 2013

This section presents an analysis of the visits data for 2013.

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

Visits to free attractions accounted for two thirds (66.7%) of all visits to attractions in Wales in 2013, while visits to paid attractions accounted for one third 33.3%). In 2012, there was a more even split of visits to free vs. paid attractions (53.5% free vs. 46.5 paid) – see Table 5.1 below.

Table 5.1: Overall visits by admission type 2013 (r)

Admission type	Base	No. of visits 2013	% of visits
Free	100	8,613,579	66.7%
Paid	73	4,302,127	33.3%
TOTAL	**173**	**12,915,706**	**100.0%**

Base: attractions providing data in 2013 (173)

Revised on 23 September 2014

Overall, attractions in South East Wales received the highest number of visits in 2013 (38.6% of total), closely followed by North Wales (30.9%). While attractions in South West Wales received 24.1% of all visits, Mid Wales attractions received just 6.2%.

Focusing on South East Wales, visits to free attractions accounted for 49.9% of all free visits, while visits to paid attractions accounted for just 16.2% of all visits. However, in South West Wales, 18.2% of all free visits were conducted in this region, compared to 35.8% of all paid visits – see Table 5.2 below.

Table 5.2: Overall visits by admission type and Wales region 2013 (r)

Wales region	Free			Paid			ALL		
	Base	No. of visits 2013	%	Base	No. of visits 2013	%	Base	No. of visits 2013	%
Mid	16	385,127	4.4%	12	416,302	9.7%	28	801,429	6.2%
North	30	2,353,566	27.3%	27	1,646,953	38.3%	57	4,000,519	30.9%
South East	29	4,299,451	49.9%	18	698,829	16.2%	47	4,998,280	38.6%
South West	25	1,575,435	18.2%	16	1,540,043	35.8%	41	3,115,478	24.1%
TOTAL	**100**	**8,613,579**	**66.7%**	**73**	**4,302,127**	**33.3%**	**173**	**12,915,706**	**100.0%**

Base: attractions providing data in 2013: free (100); paid (73)

Revised on 23 September 2014

Table 5.3 below shows how the proportion of ***attractions*** in each region relates to the proportion of ***visits***.

In North and South West Wales, the proportion of visits to attractions in these regions roughly reflects the proportion of attractions contained within them:

- North Wales – roughly a third of attractions vs. a third of visits
- South West Wales – roughly a quarter of attractions vs. a quarter of visits.

However, in Mid and South East Wales, there is more of a discrepancy between attraction numbers and visitor numbers. While Mid Wales contains 16.1% of all attractions responding to the survey, visits to these attractions accounted for just 6.2% of all visits in 2013. Moreover, while South East Wales contains 27.1% of all attractions responding to the survey, visits to these attractions accounted for 38.6% of all visits in 2013. This is reflected in the average number of visits to attractions in these two areas (c. 28k in Mid Wales vs. c. 106k in South East Wales) – see Table 5.3 below.

Table 5.3: Share of attractions and visits by region 2013, plus average visitor numbers 2013 and 2012 (different samples) (r)

Wales region	Base	% of attractions	% of visits	Average no. of visits per attraction 2013	Average no. of visits per attraction 2012
Mid	28	16.1%	6.2%	28,622	33,949
North	57	32.9%	30.9%	70,185	61,926
South East	47	27.1%	38.6%	106,346	117,810
South West	41	23.6%	24.1%	75,982	62,536
TOTAL	**173**	**100.0%**	**100.0%**	**74,657**	**69,977**

Base: attractions providing data: 2013 (173); 2012 (190)
Revised on 23 September 2014

Visits to museums and art galleries accounted for nearly two in five of all visits (37.7%). A higher proportion of these were visits to free attractions (51.7% of all free visits) compared to paid visits (9.4% of all paid visits).

Visits to country parks accounted for 22.4% of all visits to attractions in Wales in 2013. Again, a higher proportion of these were visits to free attractions (28.5% of all free visits) compared to paid visits (10.0% of all paid visits).

Table 5.4 below provides more details on visit numbers to free and paid attractions, according to attraction type.

Table 5.4: Overall visits by admission type and attraction category 2013 (r)

Attraction category	Free			Paid			ALL		
	Base	No. of visits 2013	%	Base	No. of visits 2013	%	Base	No. of visits 2013	%
Historic property	21	1,430,402	16.6%	33	1,328,833	30.9%	54	2,759,235	21.4%
Museum / art gallery	44	4,460,891	51.7%	10	405,298	9.4%	54	4,866,189	37.7%
Industrial / craft attraction	5*	111,303	1.2%	9	384,850	8.9%	14	496,153	3.8%
Country park / garden / other natural	24	2,457,384	28.5%	10	431,048	10.0%	34	2,888,432	22.4%
Wildlife attraction	3*	65,598	0.7%	5	618,928	14.4%	8	684,526	5.3%
Themed attraction / leisure park / centre	Not applicable			1	712,616	16.4%	1	712,616	5.5%
Railway / tramway	3*	88,001	1.0%	5	420,554	9.8%	8	508,555	3.9%
TOTAL	**100**	**8,613,579**	**66.7%**	**73**	**4,302,127**	**33.3%**	**173**	**12,915,706**	**100.0%**

Base: attractions providing data in 2013: free (100); paid (73)
NB VERY SMALL BASES
Revised on 23 September 2014

Table 5.5 below shows the relative proportions of ***attractions*** responding to the survey in 2013 against the relative proportion of ***visits***, by attraction category.

While museums and art galleries accounted for 31.2% of attractions, the number of visits to these types of attraction accounted for 37.7% of all visits in 2013. And while historic properties also accounted for 31.2% of attractions, these received a relatively smaller proportion of 21.4% of all visits.

Themed attractions (just 0.6% of the sample) accounted for 5.5% of all visits to attractions in Wales in 2013 – see Table 5.5 below.

Table 5.5: Share of attractions and visits by attraction category 2013, plus average visitor numbers 2013 and 2012 (different samples) (r)

Attraction category	Base	% of attractions	% of visits	Average no. of visits per attraction 2013	Average no. of visits per attraction 2012
Historic property	54	31.2%	21.4%	51,097	50,148
Museum / art gallery	54	31.2%	37.7%	90,115	81,490
Industrial / craft attraction	14	8.1%	3.8%	35,440	35,458
Country park / garden / other natural	34	19.7%	22.4%	84,954	82,441
Wildlife attraction	8*	4.6%	5.3%	85,566	29,739
Themed attraction / leisure park / centre	1*	0.6%	5.5%	712,616	736,949
Railway / tramway	8*	4.6%	3.9%	63,569	66,131
TOTAL	**173**	**100.0%**	**100.0%**	**74,657**	**69,977**

Base: attractions providing data: 2013 (173); 2012 (190)
NB VERY SMALL BASES
Revised on 23 September 2014

Most of the visits to attractions in Wales in 2013 were made to privately owned attractions (42.6%). A further 28.9% were made to Local Authority owned attractions.

A higher number of visits were made to privately owned free attractions (c. 3.0 million) vs. privately owned paid attractions (2.5 million), although the latter accounted for the highest proportion of all paid visits (57.5%) – see Table 5.6 below for more details.

Table 5.6: Overall visits by admission type and ownership 2013 (r)

Ownership	Free			Paid			ALL		
	Base	No. of visits 2013	%	Base	No. of visits 2013	%	Base	No. of visits 2013	%
Cadw	-	-	-	26	1,060,921	24.7%	26	1,060,921	8.2%
Government	7*	1,648,790	19.1%	-	-	-	7	1,648,790	12.8%
Local Authority	36	2,964,434	34.4%	12	767,562	17.8%	48	3,731,996	28.9%
The National Trust	15	971,389	11.3%	-	-	-	15	971,389	7.5%
Private owner / trust	42	3,028,966	35.2%	35	2,473,644	57.5%	77	5,502,610	42.6%
TOTAL	**100**	**8,613,579**	**66.7%**	**73**	**4,302,127**	**33.3%**	**173**	**12,915,706**	**100.0%**

Base: attractions providing data in 2013: free (100); paid (73)
NB VERY SMALL BASES
Revised on 23 September 2014

Table 5.7 below shows the relative proportions of ***attractions*** responding to the survey in 2013 against the relative proportion of ***visits***, by ownership.

Privately owned attractions accounted for around two in five of the sample (44.5%) and two in five visits (42.6%). In addition to this, Local Authority owned attractions accounted for around a quarter of attractions and visits (27.7% and 28.9% respectively).

While Cadw owned attractions accounted for 15.0% of the sample, they received a relatively smaller proportion of overall visits (8.2%). Conversely, Government owned attractions accounted for just 4.0% of the sample, but 12.8% of all visits in 2013 – see Table 5.7 below for more details.

Table 5.7: Share of attractions and visits by ownership 2013, plus average visitor numbers 2013 and 2012 (different samples) (r)

Ownership	Base	% of attractions	% of visits	Average no. of visits per attraction 2013	Average no. of visits per attraction 2012
Cadw	26	15.0%	8.2%	40,805	40,535
Government	7*	4.0%	12.8%	235,541	248,551
Local Authority	48	27.7%	28.9%	77,750	77,194
The National Trust	15	8.7%	7.5%	64,759	61,341
Private owner / trust	77	44.5%	42.6%	71,462	61,873
TOTAL	**173**	**100.0%**	**100.0%**	**74,657**	**69,977**

Base: attractions providing data: 2013 (173); 2012 (190)
NB VERY SMALL BASES
Revised on 23 September 2014

Amongst all attractions responding to the survey in 2013, just 13 reported that they received 200,000 or more visits during the year – visits to these 13 attractions accounted for 43.6% of all visits in 2013. Most of these larger attractions did not charge admissions (11) and received over half of all visits to free attractions (52.3%). The two paid attractions with high visit numbers accounted for a relatively smaller proportion of all paid visits (26.3%).

Generally speaking, the proportion of visits to paid attractions was more evenly distributed amongst the smaller and larger attractions compared to free attractions – see Table 5.8 below for more details.

Table 5.8: Overall visits by admission type and range of total visits 2013 (r)

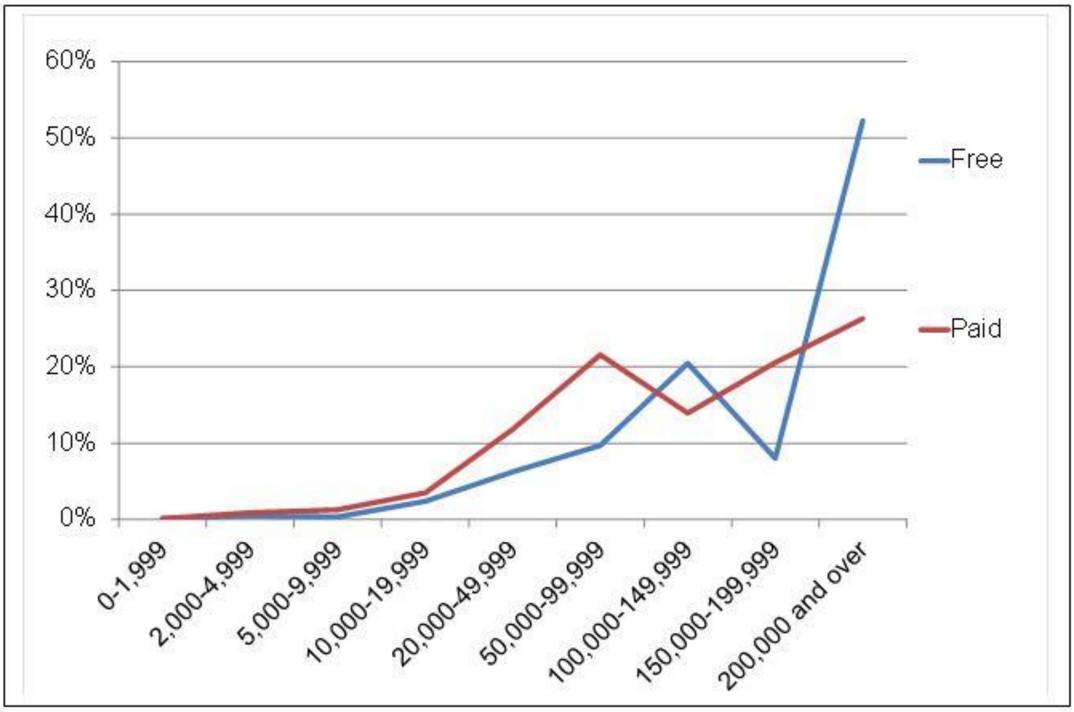
Range of total visits	Free			Paid			ALL		
	Base	No. of visits 2013	%	Base	No. of visits 2013	%	Base	No. of visits 2013	%
0 – 1,999	11	11,099	0.1%	4	4,877	0.1%	15	15,976	0.1%
2,000 – 4,999	13	42,987	0.5%	11	37,971	0.9%	24	80,958	0.6%
5,000 – 9,999	4*	30,727	0.4%	7	54,291	1.3%	11	85,018	0.7%
10,000 – 19,999	15	206,896	2.4%	9	150,654	3.5%	24	357,550	2.8%
20,000 – 49,999	18	536,672	6.2%	16	509,506	11.8%	34	1,046,178	8.1%
50,000 – 99,999	11	833,712	9.7%	14	928,097	21.6%	25	1,761,809	13.6%
100,000 – 149,999	13	1,761,718	20.5%	5	600,949	14.0%	18	2,362,667	18.3%
150,000 – 199,999	4*	688,553	8.0%	5	883,552	20.5%	9	1,572,105	12.2%
200,000 and over	11	4,501,215	52.3%	2	1,132,230	26.3%	13	5,633,445	43.6%
TOTAL	**100**	**8,613,579**	**66.7%**	**73**	**4,302,127**	**33.3%**	**173**	**12,915,706**	**100.0%**

Base: attractions providing data in 2013 - NB VERY SMALL BASES

Revised on 23 September 2014

Figure 5.8a overleaf provides a visual representation of the above data, and shows the difference between the distribution of visits across smaller and larger free attractions vs. the distribution of visits across smaller and larger paid attractions.

Figure 5.8a: Overall visits by admission type and range of total visits 2013 (r)



Base: attractions providing data in 2013 (173)

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6. Operations

6.1 Gross revenue movement

This section provides an overview of gross revenue, revenue generated from tourists, employment in tourism activities, marketing activities and upgrade/investment in the attractions sector. It should be noted that, as in previous sections of the report, not all respondents answered all questions, and have therefore been omitted from the samples relevant to the individual questions.

While around a quarter of attractions reported a decrease in gross revenue in 2013 (26.3%), higher proportions said that their gross revenue had increased or remained at a similar level (36.8% for each). This is slightly more positive than the findings from the 2012 attractions survey, when 28.8% of attractions responding to this question reported that gross revenue had gone down, and 26.9% reported that it had gone up – see Table 6.1 below.

Table 6.1: Gross revenue movement over time (different samples)

Admission type	2013 / 2012 % attractions	2012 / 2011 % attractions
Base	95	104
Down	26.3%	28.8%
Similar	36.8%	44.2%
Up	36.8%	26.9%

Base: all attractions providing data in 2013 (95) and 2012 (104)

Looking at the data in a slightly different way, i.e. comparing like-for-like data from attractions that responded in **both** 2013 **and** 2012, the picture is even more positive: the proportion reporting a drop in revenue decreased from 50.7% in 2012 to 26.7% in 2013. Moreover, the proportion reporting an increase in revenue went up from 26.9% in 2012 to 37.8% in 2013 – see Table 6.2 below.

Table 6.2: Average gross revenue movement over time (same sample)

Admission type	2013 / 2012 % attractions	2012 / 2011 % attractions
Base	45	67
Down	26.7%	50.7%
Similar	35.6%	22.4%
Up	37.8%	26.9%

Base: all attractions providing data in both 2013/2012 (45) and 2012/2011 (67)

Overall, there was an average increase in gross revenue of 3.4% in 2013, compared to an overall average decrease of 2.8% in 2012. Table 6.3 below illustrates how this in more detail, and shows the proportions of attractions reporting increases/decreases in 2013 against 2012.

Table 6.3: Average revenue movement by range 2013 / 2012 (different samples)

Gross revenue movement range	2013 % of visits	2012 % of visits
-50% or more	1.2%	0.0%
-21% to -50%	1.2%	12.5%
-11% to -20%	8.6%	10.2%
-1% to -10%	14.8%	18.2%
0% (no change)	43.2%	31.8%
+1% to +10%	9.9%	17.0%
+11% to +20%	11.1%	5.7%
+21% to +50%	8.6%	4.5%
+50% or more	1.2%	0.0%
AVERAGE TREND	**+3.4%**	**-2.8%**

Base: all attractions providing data in 2013 (81) and 2012 (88)

Wildlife attractions reported the highest increase in gross revenue in 2013 (+26.6%): this is significantly higher than the figure reported in 2012 (+1.0%). Please note that the sample of wildlife attractions contributing data in 2013 and 2012 is different.

With the exception of industrial/craft attractions (-1.5%) and themed attractions (-3.0%), all other types of attraction reported an increase in gross revenue in 2013 – see Table 6.4 below.

Table 6.4: Average revenue movement by attraction category 2013 / 2012 (different samples)

Attraction category	2013 average revenue movement	2012 average revenue movement
Historic property	+2.0%	-6.8%
Museum / art gallery	+0.2%	+0.9%
Industrial / craft attraction	-1.5%	-3.9%
Country park / garden / other natural	+3.1%	-9.7%
Wildlife attraction	+26.6%	+1.0%
Themed attraction / leisure park / centre	-3.0%	-
Railway / tramway	+5.0%	-2.9%
TOTAL	**+3.4%**	**-2.8%**

Base: all attractions providing data in 2013 (81) and 2012 (88)

6.2 Average revenue per visitor 2013 (£)

Attractions were asked to provide the average revenue (including VAT) per visitor, i.e. the total spend per category divided by the total number of visitors across the year.

A total of 71 attractions provided this information – the remaining 102 attractions did not provide this level of detailed information and have been excluded from the sample, resulting in some very small base sizes. Therefore caution should be taken when interpreting this data.

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 relates to workshops, hire of equipment/rooms, tuition etc.

The average revenue generated across all types of spend and all types of attraction is £1.27 for free attractions and £5.39 for paid attractions.

Average admission prices continue to vary considerably between different types of paid attraction: while country parks, gardens and other types of nature attraction charge an average of £3.30 for admission, railways and tramways charge over four times this amount (average of £14.32).

As would be expected, admission prices have a significant influence on the revenue generated from visitors, resulting in marked differences when examining free and paid attractions of the same type. For instance, visitors to paid museums and arts galleries generate and average of £7.46 per visitor, while visitors to free attractions of the same type generate only £0.56. Similarly, visitors to paid industrial/craft attractions generate an average of £9.11, where visitors to free attractions of the same type generate around half this amount (£5.01) – see Table 6.5 below for more details.

Table 6.5: Average visitor revenue by attraction category 2013

Attraction category		Base	Admissions	Donations	Catering	Retail	Parking	Other	Total
Historic property	F	3*		£0.52	£5.00	£1.00	Not provided		£0.34
	P	5*	£4.22	£0.19	£3.24	£2.26			£1.13
Museum / art gallery	F	14		£0.74	£0.68	£0.67	£0.11	£0.27	£0.56
	P	8*	£5.15	£0.88	£1.96	£2.29	£0.00	£0.00	£7.46
Industrial / craft attraction	F	3*		£0.00	£2.50	£7.51	£0.00	£0.00	£5.01
	P	7*	£4.91	£0.00	£1.26	£6.28	£0.00	£1.21	£9.11
Country park / garden / other natural	F	10		£0.01	£3.06	£6.47	£0.32	£0.00	£2.73
	P	8*	£3.30	£0.06	£1.61	£2.46	£2.00	£0.06	£5.69
Wildlife attraction	F	2*		£0.24	£1.41	£0.10	Not provided		£1.13
	P	4*	£5.16	£0.15	£2.26	£1.18	£0.00	£1.14	£6.19
Themed attraction / leisure park / centre	F								
	P	-	Not provided						
Railway / tramway	F	2*		£0.65	Not provided				£0.43
	P	5*	£14.32	£0.00	£4.98	£5.29	£0.43	£0.00	£21.74
AVERAGE	**F**	**34**		**£0.59**	**£1.82**	**£3.14**	**£0.20**	**£0.20**	**£1.27**
	P	**37**	**£5.89**	**£0.35**	**£2.39**	**£3.21**	**£0.58**	**£0.43**	**£5.39**

Base: all attractions providing data in 2013 (71)
F = free (34); P = paid (37) – NB VERY SMALL BASES

Overall, from the data provided by both free and paid attractions across Wales, the average revenue generated by visitors to attractions is £3.01. Examining the data by region, it can be seen that attractions in Mid Wales generate the highest average spend per visitor (£4.48), and attractions in South West Wales the lowest (£2.00) – see Table 6.6 below.

Table 6.6: Average visitor revenue by Wales region 2013

Wales region	Base	Admissions	Donations	Catering	Retail	Parking	Other	Total
Mid	15	£6.90	£0.25	£3.18	£3.69	£0.20	£0.05	£4.48
North	23	£6.73	£0.68	£2.35	£2.68	£0.53	£0.33	£3.06
South East	13	£6.01	£1.01	£2.59	£6.09	£0.00	£0.75	£2.96
South West	20	£3.68	£0.18	£0.96	£1.55	£0.80	£0.33	£2.00
AVERAGE	**71**	**£5.89**	**£0.47**	**£2.17**	**£3.18**	**£0.44**	**£0.35**	**£3.01**

Base: all attractions providing data in 2013 (71)

Table 6.7 below examines the regional revenue data in more detail, looking at free and paid attractions separately. The higher than average revenue generated by visitors to Mid Wales is being influenced by spend at paid attractions (average of £8.65 per visitor): visitors to paid attractions in South West Wales generate around half this amount (£4.06).

Moreover, while visitors to free attractions in North, Mid and South East Wales generate roughly the same amount of revenue (approx. £1.50), visitors to free attractions in South West Wales generate significantly less than this (£0.40) – see Table 6.7 below.

Table 6.7: Average visitor revenue by admission type and Wales region 2013

Wales region		Base	Admissions	Donations	Catering	Retail	Parking	Other	Total
Mid	F	6*		£0.43	£1.21	£6.29	Not provided		£1.36
	P	9*	£6.90	£0.13	£3.58	£2.72	£0.20	£0.05	£8.65
North	F	10		£1.43	£1.44	£2.89	£0.29	£0.45	£1.27
	P	13	£6.73	£0.05	£2.81	£2.51	£0.86	£0.21	£5.06
South East	F	7*		£0.34	£3.56	£5.26	£0.00	£0.00	£1.74
	P	6*	£6.01	£1.67	£0.98	£6.92	£0.00	£1.00	£4.92
South West	F	11		£0.23	£0.29	£1.28	£0.00	£0.01	£0.68
	P	9*	£3.68	£0.05	£1.41	£1.88	£1.33	£0.57	£4.06
AVERAGE	**F**	**34**		**£0.59**	**£1.82**	**£3.14**	**£0.20**	**£0.20**	**£1.27**
	P	**37**	**£5.89**	**£0.35**	**£2.39**	**£3.21**	**£0.58**	**£0.43**	**£5.39**

Base: all attractions providing data in 2013
F = free (34); P = paid (37) – NB VERY SMALL BASES

6.3 Employment 2013

Attraction operators were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2013. A total of 107 attractions responded to this part of the survey. It should be borne in mind that some attractions gave estimates on employee numbers.

Unpaid volunteers account for the largest proportion of employees overall (45.8%): there are slightly more permanent unpaid volunteers (28.4%) compared to seasonal volunteers (17.4%)

More full-time staff are permanent (20.2%) as opposed to seasonal (6.1%), whereas the split between permanent and seasonal amongst part-time staff is more consistent (16.9% and 10.9% respectively) – see Table 6.8 below.

Table 6.8: Total employees reported in 2013 (r)

Attraction category		No. of employees	%
Permanent	Full-time	684	20.2%
	Part-time	572	16.9%
	Unpaid volunteers	958	28.4%
Seasonal	Full-time	207	6.1%
	Part-time	370	10.9%
	Unpaid volunteers	588	17.4%
TOTAL		**3,379**	**100.0%**

Base: all attractions providing data in 2013 (107)

Revised on 23 September 2014

The profile of employees by attraction type varies considerably. The themed attraction taking part in the research only employs permanent full-time and part-time staff. Similarly, the vast majority of staff at railways/tramways are permanent (81.7%) and mainly unpaid volunteers (63.7%).

On the other hand, industrial/craft tend to employ more seasonal workers than permanent staff (61.0%) – see Table 6.9 below.

Table 6.9: Total employees by attraction category reported in 2013

Attraction category	Base		Permanent				Seasonal			
			FT	PT	UV	TOTAL	FT	PT	UV	TOTAL
Historic property	13	No.	27	32	115	174	5	35	81	121
		%	9.2%	10.8%	39.0%	59.0%	1.7%	11.9%	27.5%	41.0%
Museum / art gallery	41	No.	270	322	282	874	44	97	335	476
		%	20.0%	23.9%	20.9%	64.8%	3.3%	7.2%	24.8%	35.3%
Industrial / craft attraction	13	No.	55	45	0	100	13	143	0	156
		%	21.5%	17.6%	0.0%	39.1%	5.1%	55.9%	0.0%	61.0%
Country park / garden / other natural	26	No.	102	70	98	270	19	49	122	190
		%	22.2%	15.2%	21.3%	58.7%	4.1%	10.7%	26.5%	41.3%
Wildlife attraction	6*	No.	75	12	123	210	82	24	18	124
		%	22.5%	3.6%	36.8%	62.9%	24.6%	7.2%	5.4%	37.2%
Themed attraction / leisure park / centre	1*	No.	60	90	0	150	0	0	0	0
		%	40.0%	60.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Railway / tramway	7*	No.	95	1	340	436	44	22	32	98
		%	17.8%	0.2%	63.7%	81.7%	8.2%	4.1%	6.0%	18.3%
TOTAL	**107**		**684**	**572**	**958**	**2,214**	**207**	**370**	**588**	**1,165**

Base: all attractions providing data in 2013 (107)
FT = full-time; PT = part-time; UV = unpaid volunteer
NB VERY SMALL BASES
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Table 6.10 below shows how numbers of employees has changed between 2012 and 2013. Please note that these are different samples, and do not reflect exact like-to-like changes amongst the same attractions.

Since 2012, there have been significant increases in the number of permanent unpaid volunteers (+78.1%) and permanent part-time employees (+51.7%) working in the sector. However, seasonal part-time employee numbers and unpaid volunteers have decreased (-28.8% and -58.2% respectively) – see Table 6.10 below.

Table 6.10: Total employees reported in 2013 and 2012 (r)

Employee type		No. of employees 2013	No. of employees 2012	% change
Permanent	Full-time	864	768	-10.9%
	Part-time	572	377	+51.7%
	Unpaid volunteers	958	538	+78.1%
Seasonal	Full-time	207	209	-1.0%
	Part-time	370	520	-28.8%
	Unpaid volunteers	388	928	-58.2%
TOTAL		**3,379**	**3,340**	**+1.2%**

Base: all attractions providing data in 2013 (107) and 2012 (78)

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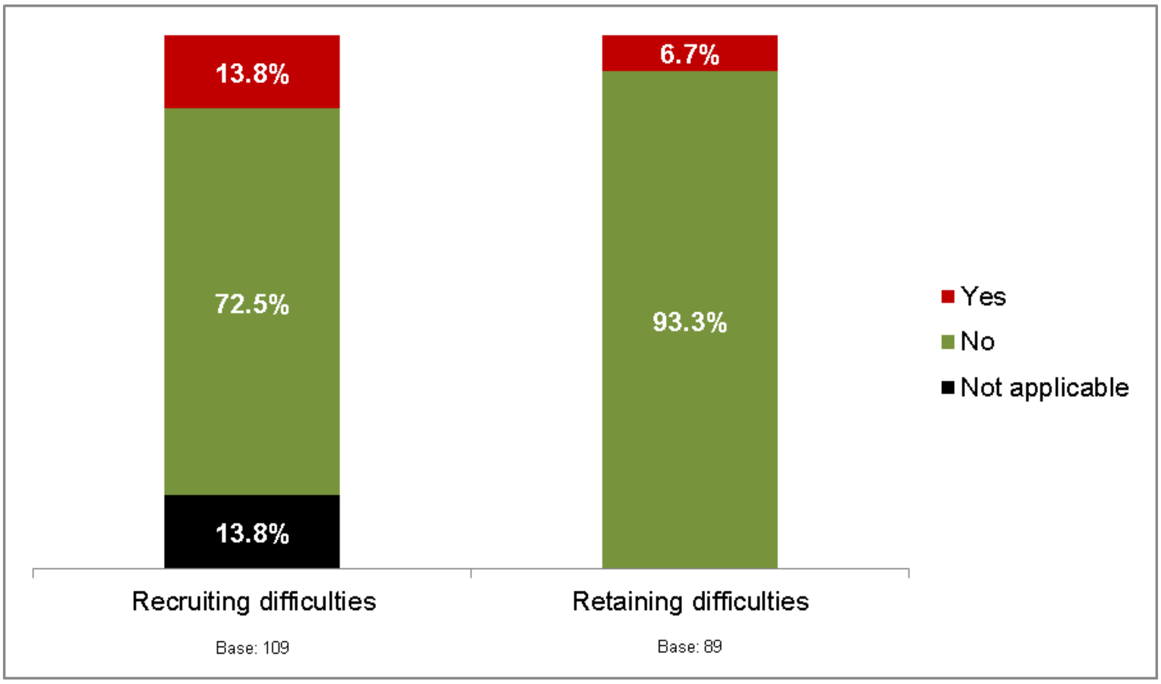
The majority of attractions proving information on recruitment report that they did not have any difficulties recruiting staff in 2013 (72.5%): amongst the small proportion who did have difficulties (13.8%) the main reasons given for this were:

- Not enough applicants
- Poor quality applications
- Problems finding volunteers willing to cover shifts
- Local Authority recruitment freezes.

Amongst those attractions providing information on the retention of employees, over nine in ten (93.3%) had not had any problems retaining their staff in 2013. The reasons given for losing staff amongst the small minority reporting problems were:

- Permanent staff leaving for better working hours
- Local Authority budget freezes
- Staff leaving and not being replaced
- Insufficient interest in working in the locality – see Figure 6.11 below.

Figure 6.11: Recruitment and retention difficulties 2013



6.4 Marketing expenditure 2013 / 2012

Most of the attractions providing data on marketing expenditure reported that their marketing spend remained at a similar level in 2013 compared to 2012 (68.2%).

While one in ten attractions (11.8%) have decreased marketing spend, around twice this number of attractions (19.1%) have increased their expenditure between 2012 and 2013 – see Table 6.12 below.

Table 6.12: Marketing expenditure levels – 2013 vs. 2012

Admission type	No. of attractions	% attractions
Base	**110**	**100.0%**
Down	13	11.8%
Similar	76	69.1%
Up	21	19.1%

Base: all attractions providing data in 2013

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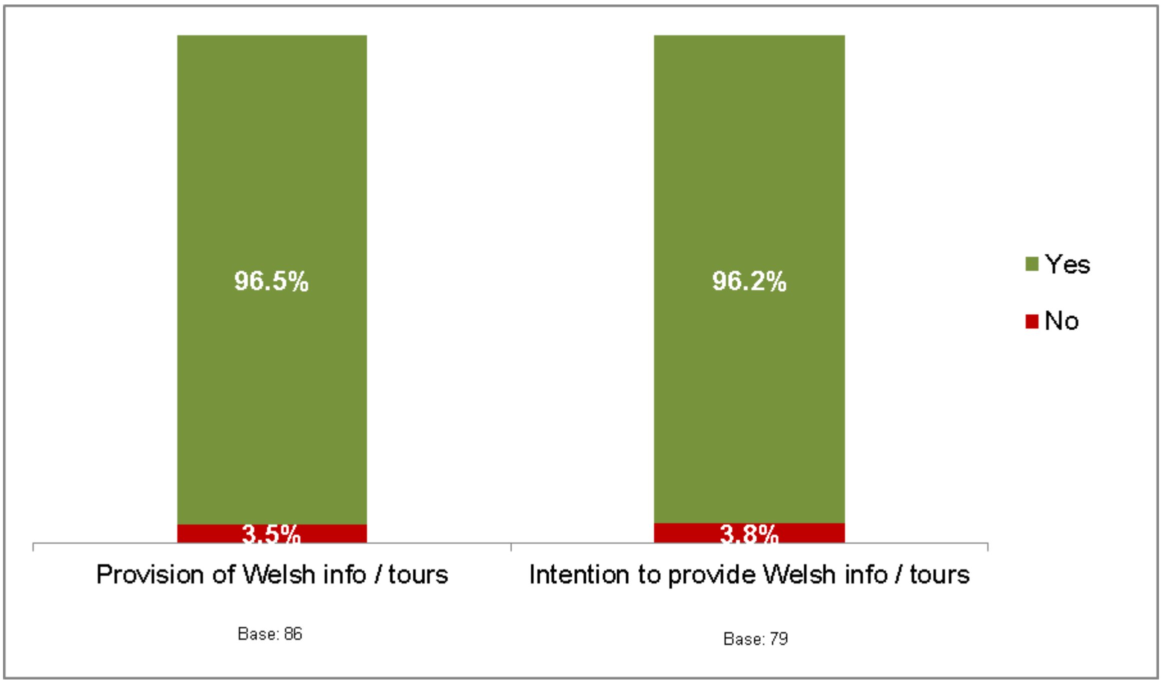
6.5 Language services

This section of the report looks at whether attractions cater for Welsh speakers, and French and German visitors' foreign language requirements.

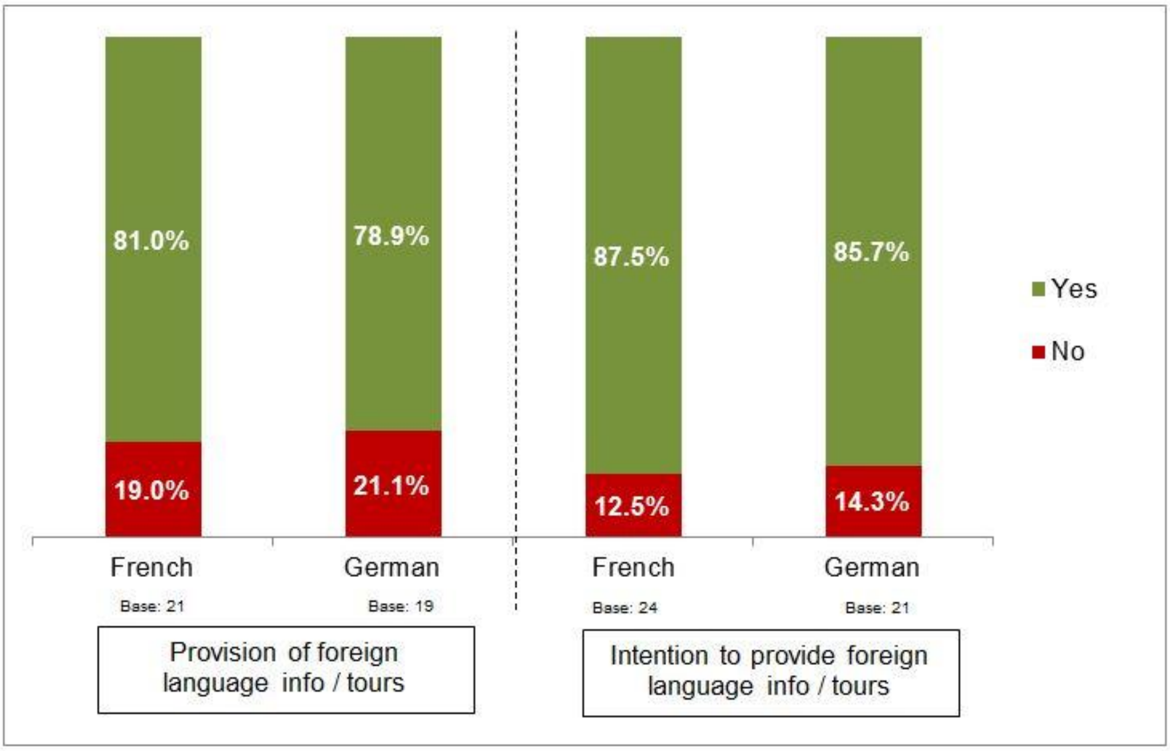
Amongst the attractions completing this section of the questionnaire, the vast majority provide information and tours in Welsh (96.5%) and intend to do so in future (96.2%) – see Figure 6.13 below.

Figure 6.13: Actual and intended provision of information and / or tours in Welsh 2013



Only a small number of attractions gave any information on whether they provide French or German language information and tours: amongst those who **did** respond, around eight in ten provide these foreign language services, and intend to do so in future – see Figure 6.14 below.

Figure 6.14: Actual and intended provision of information and / or tours in foreign languages 2013 (r)



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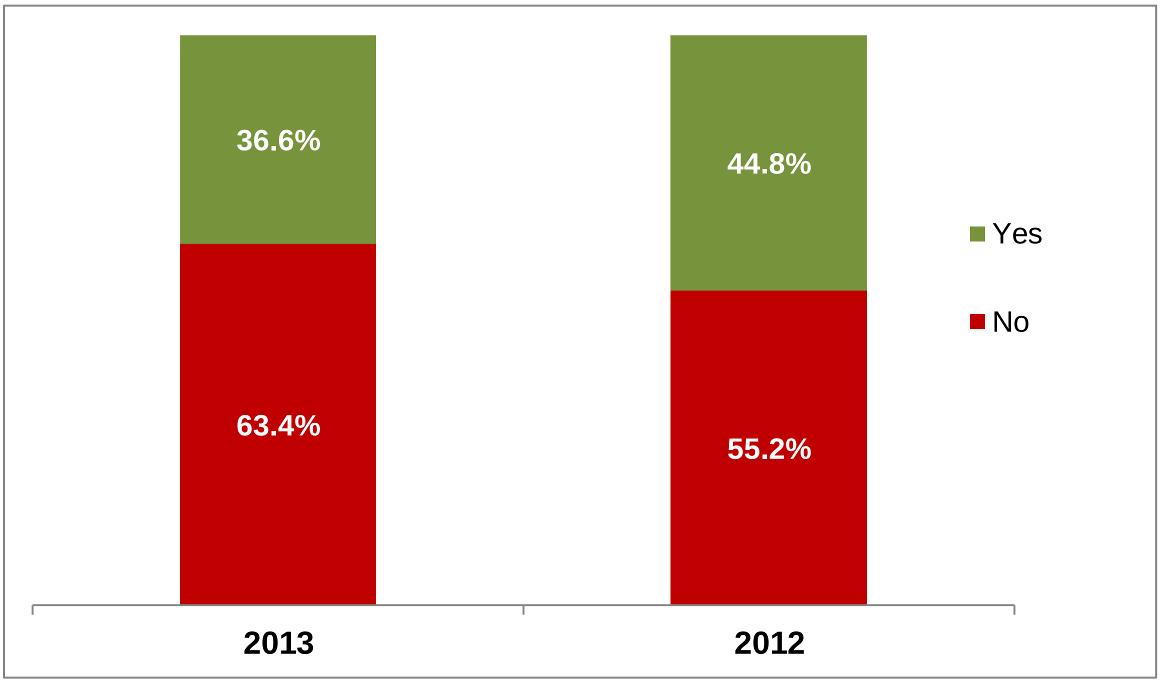
6.6 Improvements / upgrades 2013

When asked whether attractions had made any upgrades or improvements to their facilities (excluding normal repairs and upkeep), around a third reported that they have (36.6%). This is slightly lower than the figure obtained in 2012, when 44.8% of attractions had made upgrades/improvements.

Please note that these figures relate to different samples, and do not reflect exact like-to-like changes amongst the same attractions - see Figure 6.15 below.

Figure 6.15: Improvements / upgrades – 2013 vs. 2012 (r)



Base: 2013 = 109; 2012 = 125

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Amongst the attractions that **did** make upgrades/improvements, the value of these changes ranges from just £100 to £1.6 million. Excluding this large expenditure, the average spend on upgrades/improvements in 2013 is £68,196.

7. Visitor profile 2013

For all types of attraction, the majority of visitors are adults (72.0%). Historic properties receive the highest proportion of adult visitors (79.5%), while wildlife attractions receive the highest proportion of child visitors (37.3%) – see Table 7.1 below.

Table 7.1: Proportion of adult and child visits by attraction category 2013

Attraction category	Base	Average % adult visits	Average % child visits
Historic property	12	79.5	20.5
Museum / art gallery	36	72.8	27.2
Industrial / craft attraction	13	71.9	28.1
Country park / garden / other natural	23	69.1	30.9
Wildlife attraction	7*	62.7	37.3
Themed attraction / leisure park / centre	1*	65.0	35.0
Railway / tramway	7*	74.4	25.6
TOTAL	**99**	**72.0**	**28.0**

Base: all attractions providing data in 2013 (99) – NB VERY SMALL BASES

Overall, around half of visitors to attractions in Wales live in Wales (51.2%): local visitors make up around six in ten visitors to country parks/gardens (59.4%) and museums/art galleries (59.3%).

Visitors from the rest of the UK account for two in five of all visitors to attractions in Wales (38.9%), but are more prevalent at railways / tramways (76.0%).

Around one in ten visitors to attractions in Wales live overseas (9.9%); visitors for abroad are most likely to visit historic properties (17.3%) and railways / tramways (13.5%) – see Table 7.2 below.

Table 7.2: Origin of visitors by attraction category 2013

Attraction category	Base	Average % overseas visitors	Average % local visitors	Average % visitors from rest of UK
Historic property	9*	17.3%	37.2%	45.4%
Museum / art gallery	30	9.8%	59.3%	30.9%
Industrial / craft attraction	11	10.3%	40.8%	48.9%
Country park / garden / other natural	21	6.0%	59.4%	34.6%
Wildlife attraction	6*	9.4%	49.2%	41.4%
Themed attraction / leisure park / centre	-		Not provided	
Railway / tramway	4*	13.5%	10.5%	76.0%
TOTAL	**81**	**9.9%**	**51.2%**	**38.9%**

Base: attractions providing data in 2013 - NB VERY SMALL BASES

Overall, 3.1% of visits to attractions in Wales (6.37 million) are made by school children: this proportion rises to 5.9% amongst wildlife attractions, and decreases to 1.8% of museums / galleries – see Table 7.3 below.

Table 7.3: Proportion of school visits by attraction category 2013 (r)

Attraction category	Base	No. school visits 2013	Total visits 2013	% school visits
Historic property	12	11,939	642,178	1.9%
Museum / art gallery	42	47,293	2,582,321	1.8%
Industrial / craft attraction	11	20,128	432,876	4.6%
Country park / garden / other natural	25	100,238	2,159,511	4.6%
Wildlife attraction	4*	5,404	91,334	5.9%
Themed attraction / leisure park / centre	-		Not provided	
Railway / tramway	6*	10,860	463,388	2.3%
TOTAL	**100**	**195,862**	**6,371,608**	**3.1%**

Base: attractions providing data in 2013 – NB VERY SMALL BASES
Revised on 23 September 2014

On average, attractions in Wales received an average of 61 group bookings in 2013. Based on the information provided, railways / tramways received a significantly higher than average number of group bookings (262) per attraction).

Historic properties (81) and industrial / craft attractions (75) also received a higher than average number of group bookings, whereas country parks (30) received a lower than average number of group bookings (21) – see Table 7.4 below.

Table 7.4: Group bookings by attraction category 2013 (r)

Attraction category	Base	Average no. of group bookings per attraction
Historic property	13	81
Museum / art gallery	28	37
Industrial / craft attraction	12	75
Country park / garden / other natural	25	30
Wildlife attraction	6*	62
Themed attraction / leisure park / centre	-	Not provided
Railway / tramway	5*	262
TOTAL	**90**	**61**

Base: attractions providing data in 2013 – NB VERY SMALL BASES

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8. Alphabetical list of attractions responding to the survey 2013 (r)

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2013 VISITS	2012 VISITS	% CHANGE	£ ADULT ADMISSION
Aberconwy House	NW	HP	NT	C	20,383	25,276	-19.4%	-
Aberdulais Falls	SWW	CP	NT	R	23,767	26,472	-10.2%	-
Aberglasney Gardens	SWW	CP	PO	R	34,428	26,214	31.3%	-
Abertillery & District Museum	SEW	MAG	PO	U	10,000*	10,000*	0.0%	-
Aberystwyth University, School of Art Gallery and Museum	MW	MAG	PO	U	12,300*	14,000*	-12.1%	-
Amelia Farm Trust	SEW	WL	PO	R	28,000*	27,000*	3.7%	-
Amgueddfa Syr Henry Jones	NW	MAG	PO	U	418	306	36.6%	£2.50
Bala Lake Railway	MW	R/T	PO	R	19,647*	NP	-	£9.50
Barmouth Sailors' Institute	MW	MAG	PO	C	2,763*	3,800*	-27.3%	-
Beaumaris Castle	NW	HP	Cadw	C	83,823	86,864	-3.5%	-
Bellevue Park	NW	CP	LA	R	145,029	NP	-	-
Big Pit: National Coal Museum	SEW	MAG	WG	R	147,980	153,749	-3.8%	-
Blackpill Wildlife Centre	SWW	WL	PO	R	NP	NP	-	-
Blaenavon Ironworks	SEW	HP	Cadw	R	18,601	19,899	-6.5%	-
Blaenavon World Heritage Centre	SEW	IND	PO	U	34,134	NP	-	-
Blaina Museum & Heritage Centre	SEW	MAG	PO	U	1,600*	1,600*	0.0%	-
Bodelwyddan Castle	NW	MAG	LA	R	56,849	47,525*	19.6%	£6.30
Bodnant Garden	NW	CP	NT	R	178,102	152,439*	16.8%	-
Bodrhyddan Hall	NW	HP	PO	R	1,287*	2,218	-42.0%	£5.00
Brecon Beacons Waterfalls Centre	SWW	CP	PO	R	22,634	20,357	11.2%	-
Brecon Cathedral and Heritage Centre	MW	HP	PO	U	124,624	NP	-	-
Brickfield Pond	NW	CP	LA	R	79,018	68,421*	15.5%	-
Bronze Bell Collection (Sailors Institute)	MW	MAG	LA	U	2,879*	3,612	-20.3%	-
Brynmawr and District Museum	SEW	MAG	PO	U	3,197	4,170*	-23.3%	-
Caerleon Roman Baths and Amphitheatre	SEW	HP	Cadw	R	52,747	58,438	-9.7%	-
Caernarfon Castle	NW	HP	Cadw	C	163,394	176,454	-7.4%	-
Caerphilly Castle	SEW	HP	LA	U	110,687	120,273	-8.0%	-
Canolfan Y Plase	MW	MAG	PO	R	1,702*	1,383	23.1%	-
Cardiff Museum Project	SEW	MAG	LA	U	260,172	167,413*	55.4%	-
Carew Castle & Tidal Mill	SWW	HP	LA	R	33,961	27,530	23.4%	£4.75
Carew Cheriton Control Tower	SWW	MAG	PO	U	NP	761	-	-
Carmarthenshire County Museum	SWW	MAG	LA	R	12,616	12,099	4.3%	-
Carreg Cennen Castle	SWW	HP	Cadw	R	18,822	13,799	36.4%	-
Castell Coch	SEW	HP	Cadw	R	74,021	70,276	5.3%	-
Castell Henllys Iron Age Fort	SWW	HP	LA	R	25,175	23,937	5.2%	£4.75
Chepstow Castle	SEW	HP	Cadw	R	52,163	54,596	-4.5%	-
Chirk Castle	NW	HP	NT	R	129,862	133,268	-2.6%	-
Chocolate Factory (The)	SWW	IND	PO	U	2,400*	NP	-	£8.50
Colby Woodland Garden	SWW	CP	NT	R	33,263	31,289	6.3%	-
Conwy Castle	NW	HP	Cadw	C	174,920	162,665	7.5%	-
Conwy Nature Reserve	NW	CP	PO	U	76,649	72,837	5.2%	£3.00
Conwy Suspension Bridge	NW	HP	NT	C	15,055	21,606	-30.3%	-
Conwy Valley Maze	NW	CP	PO	R	NP	NP	-	-
Conwy Water Gardens	NW	IND	PO	R	65,000*	NP	-	-
Cosmeston Lakes Country Park	SEW	CP	LA	U	245,000*	250,000	-2.0%	-
Cosmeston Medieval Village	SEW	CP	LA	U	16,200*	NP	-	£2.50
Criccieth Castle	NW	HP	Cadw	R	41,096	40,540	1.4%	-
Cwmcarn Forest Drive & Visitor Centre	SEW	CP	PO	R	257,539	203,662	26.5%	-
Cyfarthfa Castle Museum	SEW	MAG	LA	U	524,789	545,006	-3.7%	-
Denbigh Castle	NW	HP	Cadw	R	13,497	12,240	10.3%	-
Devil's Bridge Waterfalls	MW	CP	PO	C	38,791*	NP	-	£3.50
Dingle Local Nature Reserve	NW	CP	LA	C	68,256	58,410	16.9%	-
Dolaucothi Gold Mines	SWW	IND	NT	R	18,946	17,767	6.6%	-
Dolwyddelan Castle	NW	HP	Cadw	R	4,383	4,260	2.9%	-
Electric Mountain	NW	IND	PO	R	38,717	NP	-	£7.75
Erddig	NW	HP	NT	R	147,291	150,818	-2.3%	-
Felin Cochwillan Watermill	NW	IND	PO	R	35	66	-47.0%	-
Flat Holm	SEW	CP	LA	C	895*	1,175*	-23.8%	£6.25
Folly Farm Adventure Park	SWW	WL	PO	R	419,614	NP	-	£9.50
Garwnant Visitor Centre	SEW	CP	PO	U	38,530	37,106*	3.8%	-
Gilfach Nature Reserve & Visitor Centre	MW	WL	PO	R	1,982	1,786	11.0%	-
Glynn Vivian Art Gallery	SWW	MAG	LA	U	22,467	40,974	-45.2%	-
Goytre Wharf Heritage Activity & Study Centre	SEW	MAG	PO	R	NP	NP	-	-
Great Orme Tramway	NW	R/T	LA	C	169,943	153,004	11.1%	£6.00
Greenfield Valley Heritage Park	NW	CP	PO	R	29,576	26,128	13.2%	£5.00
GreenWood Forest Park	NW	IND	PO	R	134,832	110,198	22.4%	£10.95
Gwili Steam Railway	SWW	R/T	PO	R	28,508	NP	-	-
Gypsy Wood Park	NW	CP	PO	R	15,192	18,000	-15.6%	£6.99

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2013 VISITS	2012 VISITS	% CHANGE	£ ADULT ADMISSION
Harlech Castle	MW	HP	Cadw	C	76,355	75,309	1.4%	-
Hergest Croft Gardens	MW	CP	PO	R	7,767	8,186	-5.1%	£6.00
Holyhead Breakwater Country Park	NW	CP	LA	R	116,593	63,188	84.5%	-
Hywel Dda Gardens & Interpretive Centre	SWW	CP	PO	R	410	NP	-	-
Inigo Jones Slateworks	NW	IND	PO	R	21,760*	24,830*	-12.4%	£5.00
Joseph Parry's Ironworkers Cottage	SEW	MAG	LA	U	1,007	NP	-	-
Kenfig Nature Reserve	SEW	CP	LA	R	12,165	20,877	-41.7%	-
Kidwelly Castle	SWW	HP	Cadw	R	27,895	26,467	5.4%	-
Kymin (The)	SEW	HP	NT	R	3,775	4,411	-14.4%	-
Kidwelly Industrial Museum	SWW	MAG	LA	R	2,639	1,227	115.1%	-
Lamphey Bishop's Palace	SWW	HP	Cadw	R	3,673	4,128	-11.0%	-
Laugharne Castle	SWW	HP	Cadw	R	11,715	11,192	4.7%	-
Llanberis Lake Railway	NW	R/T	PO	R	71,944*	64,823*	11.0%	£7.50
Llancaiach Fawr Manor	SEW	MAG	LA	R	55,083	53,264	3.4%	£7.50
Llanerchaeron	MW	HP	NT	R	31,836	39,691	-19.8%	-
Llangollen Motor Museum	NW	MAG	PO	R	3,967	4,448	-10.8%	£4.00
Llangollen Wharf	NW	IND	PO	C	109,323	128,791*	-15.1%	£12.50
Llanidloes Museum	MW	MAG	LA	R	1,536	NP	-	£1.00
Llyn Brenig Visitor Centre	NW	CP	PO	R	175,000*	NP	-	-
Loggerheads Country Park	NW	CP	LA	R	234,007	164,536*	42.2%	-
Magic of Life Butterfly House	MW	WL	PO	U	8,382	8,422	-0.5%	£6.50
Margam Country Park	SWW	CP	LA	R	182,055*	105,329*	72.8%	-
Meirion Mill	MW	IND	PO	R	24,853*	NP	-	-
Moel Famau Country Park	NW	CP	LA	R	151,000*	140,000*	7.9%	-
Moelfre Seawatch	NW	WL	LA	C	35,616	NP	-	-
Monmouth Castle & Regimental Museum	SEW	HP	PO	U	3,894	4,096	-4.9%	-
Museum of Speed	SWW	MAG	LA	R	33,063	30,015	10.2%	-
Nantclwyd-y-Dre	NW	HP	LA	U	4,284*	NP	-	-
National Assembly Debating Chamber	SEW	HP	PO	U	80,766	83,767	-3.6%	-
National Coracle Centre & Flour Mill	SWW	IND	PO	R	3,758	3,884	-3.2%	£3.50
National Cycle Collection	MW	MAG	PO	R	1,400*	NP	-	£4.00
National Museum Wales	SEW	MAG	WG	U	456,342	459,806	-0.8%	-
National Roman Legion Museum	SEW	MAG	WG	R	65,706	73,130	-10.2%	-
National Slate Museum	NW	MAG	WG	R	144,462	135,741	6.4%	-
National Waterfront Museum	SWW	MAG	WG	U	253,708	267,362	-5.1%	-
National Wool Museum	SWW	MAG	WG	R	35,626	34,212	4.1%	-
Newport Wetlands Environmental, Educational & Visitor Centre	SEW	CP	PO	R	96,332*	90,914*	6.0%	-
Newton House, Dinefwr Park & Castle	SWW	CP	NT	R	51,194	66,426	-22.9%	-
Newtown Textile Museum	MW	MAG	LA	R	933	947	-1.5%	£1.00
Norwegian Church	SEW	HP	PO	U	184,451	NP	-	-
Old Bell Museum	MW	MAG	PO	R	2,069	2,357	-12.2%	£1.00
Oriel Plas Glyn-y-Weddw	NW	MAG	PO	U	146,601	180,548	-18.8%	-
Oriel Tegfryn Gallery	NW	MAG	PO	R	10,000*	NP	-	-
Oriel y Parc	SWW	MAG	PO	C	144,993	131,323	10.4%	-
Oriel Ynys Mon	NW	MAG	LA	R	133,138*	NP	-	-
Oxwich Castle	SWW	HP	Cadw	C	6,195	6,196	0.0%	-
Padarn Country Park	NW	CP	PO	R	NP	NP	-	-
Parc Howard Museum and Art Gallery	SWW	MAG	LA	R	9,265	9,916	-6.6%	-
Parc Llandudno	NW	IND	PO	U	NP	NP	-	-
Parva Farm Vineyard	SEW	CP	PO	R	3,505*	7,600*	-53.9%	-
Pembrey Country Park	SWW	CP	LA	C	367,172	388,416*	-5.5%	-
Pembroke Glassblowing Studio	SWW	IND	PO	R	NP	NP	-	-
Pembrokeshire Candle Centre & Museum	SWW	IND	PO	R	2,469	9,500*	-74.0%	-
Pembrokeshire Sheepdogs	SWW	WL	PO	R	2,233*	2,321	-3.8%	£5.00
Penderyn Distillery	SEW	IND	PO	U	20,448*	NP	-	£6.00
Penmaenpool Centre	MW	CP	PO	R	NP	NP	-	-
Penrhyn Castle	NW	HP	NT	C	87,928	97,719	-10.0%	-
Plas Brondanw Gardens	NW	CP	PO	R	6,352	NP	-	£4.00
Plas Mawr Elizabethan Town House	NW	HP	Cadw	C	21,372	22,877	-6.6%	-
Plas Newydd	NW	HP	LA	C	92,752	NP	-	£8.90
Plas Newydd	NW	HP	NT	R	92,812	96,294	-3.6%	-
Plas-yn-Rhiw	NW	HP	NT	C	NP	32	-	-
Pontypool Museum	SEW	MAG	PO	U	35,512	NP	-	£3.00
Pontypridd Museum	SEW	MAG	LA	U	22,667	25,473*	-11.0%	-
Porthcawl Museum	SEW	MAG	PO	C	1,173	1,063	10.3%	£0.50
Porthkerry Country Park	SEW	CP	LA	R	125,000*	150,000*	-16.7%	-
Portmeirion	MW	MAG	PO	R	193,240	195,276	-1.0%	£10.00
Powis Castle & Garden	MW	HP	NT	R	113,411	111,438	1.8%	-
Powysland Museum & Montgomery Canal C'tr	MW	MAG	LA	R	4,406	5,532	-20.4%	£1.00
Quarry Hospital Visitor Centre	NW	MAG	LA	U	13,918	NP	-	-
Raglan Castle	SEW	HP	Cadw	R	56,877	53,530	6.3%	-
Rhuddlan Castle	NW	HP	Cadw	R	18,936	19,384	-2.3%	-

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2013 VISITS	2012 VISITS	% CHANGE	£ ADULT ADMISSION
Rhyl Library, Museum & Arts Centre	NW	MAG	LA	U	6,140*	NP	-	-
Robert Owen Memorial Museum	MW	MAG	PO	R	2,200*	2,000*	10.0%	-
Royal Regiment of Wales Museum of the WelSh Regiment	SEW	MAG	PO	U	58,248	NP	-	£11.00
RSPB Lake Vyrnwy Nature Reserve	MW	CP	PO	R	14,778*	17,609*	-16.1%	-
Rug Chapel	NW	HP	Cadw	R	3,325	3,318	0.2%	-
Ruthin Craft Centre Gallery	NW	MAG	LA	R	79,797	95,874	-16.8%	-
Ruthin Gaol	NW	HP	LA	R	7,322	NP	-	NP
Senedd-Dy Owain Glyndwr	MW	HP	LA	R	1,295	1,751	-26.0%	£2.50
Snowdon Mountain Railway	NW	R/T	PO	R	110,378	131,413	-16.0%	£27.00
South Stack Lighthouse	NW	IND	PO	C	19,478	98,155*	-80.2%	£4.90
St Davids Bishops Palace	SWW	HP	Cadw	R	32,509	25,044	29.8%	-
St Davids Cathedral	SWW	HP	PO	C	255,000	258,000*	-1.2%	-
St Donats Arts Centre	SEW	MAG	PO	R	7,323*	NP	-	£10.00
St Fagans: National History Museum	SEW	MAG	WG	U	544,966	615,855	-11.5%	-
St Illtyds Church	SEW	HP	LA	U	303	NP	-	-
Strata Florida Abbey	MW	HP	Cadw	R	4,956	5,442	-8.9%	-
Sugar Loaf Vineyard	SEW	CP	PO	R	8,000*	NP	-	-
Swansea Museum	SWW	MAG	LA	U	142,734	139,159	2.6%	-
Swansea Museum - Floating Exhibits	SWW	MAG	LA	U	16,153	12,334	31.0%	-
Talyllyn Railway	MW	R/T	PO	R	48,642	41,920	16.0%	£14.50
Teifi Valley Railway	MW	R/T	PO	R	NP	8,486*	-	-
The Flying Boat Centre	SWW	MAG	PO	C	4,886*	4,779	2.2%	-
The LC	SWW	THEME	PO	C	712,616	736,949	-3.3%	NP
The Narrow Guage Railway Museum	NW	R/T	PO	R	16,659	NP	-	-
The Nelson Museum & Local History Centre	SEW	MAG	LA	R	18,420	NP	-	-
The Old Market Hall	MW	HP	PO	R	2,090*	1,925	8.6%	-
The Oriel Myrddin Gallery	SWW	MAG	PO	U	25,470	NP	-	-
The Tramshed	SWW	MAG	LA	U	10,260	11,011	-6.8%	-
The Ugly House	NW	HP	PO	U	34,648	NP	-	-
The Winding House	SEW	MAG	LA	U	10,434	9,792	6.6%	-
Tintern Abbey	SEW	HP	Cadw	R	67,616	67,582	0.1%	-
Tredegar House	SEW	HP	LA	R	66,903	41,956	59.5%	-
Tretower Court & Castle	MW	HP	Cadw	R	13,758	14,939	-7.9%	-
Tudor Merchant's House	SWW	HP	NT	C	23,764	25,888	-8.2%	-
Ty Mawr Wybrnant	NW	HP	NT	R	NP	NP	-	-
Vale of Rheidol Railway	MW	R/T	PO	C	42,834*	40,273	6.4%	£16.00
Valle Crucis Abbey	NW	HP	Cadw	R	8,438	8,632	-2.2%	-
Wales Millennium Centre	SEW	MAG	PO	U	1,102,520*	1,144,628*	-3.7%	-
Welsh Mountain Zoo and Botanical Gardens	NW	WL	PO	U	135,729	NP	-	£10.95
Weobley Castle	SEW	HP	PO	R	2,755	2,501	10.2%	-
West Wales Museum of Childhood	SWW	MAG	PO	U	4,452	4,006	11.1%	£5.00
White Castle	SEW	HP	Cadw	R	9,834	9,836	0.0%	-
WWT National Wetland Centre Wales	SWW	WL	PO	R	52,970	49,219	7.6%	£8.70

Revised on 23 September 2014

Appendix I

Accompanying letters (introductory and reminder)

Appendix II

Questionnaire