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Visits to Tourist Attractions in Wales 2014

Report for Visit Wales

Visits to Tourist Attractions in Wales – 2014
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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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 2014 and 2013, at the end of the report.

Admission

If an attraction has an admission charge, the adult admission charge for high season 2014 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)
	NMW / G	Amguedda Cymru – National Museum Wales (Government)
	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
	OTH	Other travel / tours / rides
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 highlighted in red to denote the need for caution to be applied when interpreting the results.

Executive summary

i. Visits 2014

- There were 13.2 million visits made to attractions in Wales participating in the survey in 2014: 60.3%of these visits were made to attractions with free admission and 39.7% to attractions where an admission change applies.

- As most major attractions participate in the survey, it is estimated the total volume of visits recorded accounts well over 80% the grand total of visits to all attractions in Wales. Amongst all attractions responding to the survey, the 17 reporting 200,000 or more visitors accounted for 54.1% of all visits recorded in 2014.

- Participating attractions in South East Wales received the highest share of visits (39.6%), while attractions in Mid Wales received the lowest (8.2%).

- Each attraction responding to the survey received an average of 90,594 visits in 2014: this increased to 124,608 in South East Wales, and decreased to 60,015 in Mid Wales.

- Museums and art galleries received the highest proportion of visits overall (32.2%), followed by country parks / gardens (26.8%) and historic properties (21.2%).

- 42.6% of visits to attractions in Wales in 2014 were made to privately owned attractions (3.3 million to free and 2.3 million to paid).

i. Visits 2013 – 2014

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2014 and 2013 visit figures. Please note that this section only relates to those attractions that provided data **in both years** (106 attractions).

- Visits to these attractions increased by 5.6% between 2013 and 2014, from 10.5 million to 11.1 million.

- Paid attractions saw an increase in visit numbers of 6.9% (4.0 million to 4.2 million, while visits to free attractions increased by 4.9% (6.6 million to 6.9 million).

- Attractions across all regions of Wales saw an increase in visitor numbers: most markedly in South West and Mid Wales (up by 11.0% and 9.2% respectively). Visitor numbers also increased in North Wales by 5.9% and South East Wales by 1.7%

- There was a significant increase of 54.2% in visits to industrial and craft attractions in 2014 (up to 335,407 from 217,579). There were also increases in numbers for all other categories of attraction, noticeably wildlife attractions (+15.0%) and country parks (+11.5%).

- Average adult admission charges rose by 1.7% in 2014 to £7.85 (up from £7.72 in 2013); child admission prices rose slightly by 0.6% (£4.85 to £4.88).

- Adult admission charges tended to be highest in Mid Wales (average £8.29), and lowest in South West Wales (average £5.07). In terms of attraction category, railways and tramways charged the highest adult admission prices (average £18.50), while museums and art galleries charged the lowest (average £4.12).

iii. Operations

- Comparing the information on gross revenue provided by attractions responding in both 2014 and 2013, the position was much more positive in 2014, no doubt due to an increase in visitor numbers. Nearly half (47.2%) of participating attractions reported an increase in gross revenue (vs. 36.8% in 2013).This compares to 35.2% reporting a similar level of gross revenue (relatively unchanged from 36.8% reported in 2013) and a fifth (17.6%) saying their revenue had decreased (down from 26.3% in 2013).

- There was an overall average increase in revenue of 9.1% in 2014, notably higher than the increase of 3.4% seen in 2013. Museums and art galleries reported the highest increase (+25.6%): this is significantly higher than their reported increase of 0.2% in 2013. Railways and tramways also saw a noticeable increase in revenue, up by 17.3% in 2014 (compared to a reported decrease of 5.0% revenue in 2013).

- In contrast to previous years, full-time staff accounted for the largest proportion of employees in the sector (36.8%, up from 26.3% in 2013). Unpaid volunteers made up 33.5% of employees in the sector, with the remaining 29.6% comprising of part-time employees.

- Themed attractions and railways/tramways largely employed permanent staff (72.6% and 64.3% respectively): for other types of attraction the split between permanent and seasonal staff was more evenly divided.

- Most attractions did not increase their marketing expenditure in 2014 compared to 2013 (76.6%), while equal proportions of around one in ten reported to have either increased or decreased their marketing spend (11.2% saying each).

iv. Visitor profile

- For all attraction types, the majority of visitors were adults (71.2%): railways and tramways received the highest proportion of adult visitors (80.0%), while wildlife attractions received the highest proportion of child visitors (46.8%): these figures are consistent with the 2013 data.

- Just under half of visitors to attractions in Wales in 2014 were local visitors (46.7%), with a similar proportion residing in the rest of the UK (44.8%): 8.5% were overseas visitors.

- Historic properties received a higher than average proportion of overseas visitors (12.2%), while wildlife attractions received a higher than average proportion of local visitors (68.4%). Railways and tramways were most likely to attract visitors from the rest of the UK (77.5%).

- Most of the visitors to attractions in Wales in 2014 were day visitors (77.7%), with 22.3% staying in the area overnight or as part of a longer visit. Historic properties reported that 36.7% of their visitors in 2014 were staying in the area.

1. Introduction

1.1 Background

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

- Determine and report visit numbers to attractions throughout Wales
- Analyse collected data on visit numbers to identify current trends
- Provide additional comparative analysis of data contained in the survey including visit figures, operations, 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, cafés and art galleries. The visitor figures included in this report for the Millennium Centre do not include theatre goers, or visitors whose main purpose of visit is associated with the theatre (e.g. ticket sales/collection etc.). For this reason, the Millennium Centre is listed in the following pages whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be taken into account when comparing with other entries.

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 2014

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

UK Economic summary of 2014

The UK's economy grew by 2.6% in 2014, the fastest pace since 2007 and up from 1.7% in 2013 (according to data released by the Office of National Statistics). Therefore the UK was among the best-performing of the all the major economies in 2014. The services sector remained buoyant, growing by 0.8% across the year.

Unemployment levels continued to fall to a rate of 6% (1.96 million), while employment levels hit a record high of 30.8 million people in work (95% of these were in full-time employment). The UK saw the strongest employment growth in the G7 – better than the United States, Germany, Japan, Canada and France. Growth in average pay for UK workers overtook inflation for the first time in five years, rising by 1.3%, and beating the 1.2% Consumer Prices Index inflation rate.

The first half of 2014 was the most popular period ever for tourism into the UK: tourists made 16.41 million trips to the UK between January and June, an 8% rise on the same period in 2013. However, Britons going abroad cut their spending by 16% in the first six months of 2014, to £12.83bn, compared with the same period in 2013. June 2014 saw a record number of visits from overseas (3.18 million): a 10% increase on June 2013, with spending by visitors to Britain increasing to a new record of £1.97bn.

Climatic summary of 2014

All months except August were warmer than average, and this was the warmest year on record for the UK. It was also wetter than average for many locations; the most extreme weather events of the year being the winter storms of January and February, which brought damaging winds, with inland and coastal flooding.

Summer 2014 brought some fine weather - particularly in June and July.

The UK mean temperature for 2014 was 9.9 °C, 1.1 °C above the 1981-2010 long-term average: 2014 was a sunnier than average year for most areas. Sunshine amounts varied regionally but in general March, July and December were notably sunny months, whereas May and October were rather dull.

2. Methodology

2.1 Conducting the research

A total of 423 attractions were contacted in April 2015 to take part in the survey: 191 were sent a paper questionnaire and a further 232 received an email and link to a bilingual online version of the survey. The survey materials were sent out in the language/s of choice (English, Welsh or bilingual).

In addition to this, Beaufort made independent efforts to boost response, by contacting Local Authorities, National Museum Wales, National Trust and Cadw for visitor figures (56 attractions).

The survey was closed in June 2015, 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, although certain questions were removed in 2015, in order to streamline the survey.

2.2 Survey distribution and response rate

As previously mentioned, the survey was distributed to a total of 461 attractions believed to fit the tourist attraction definition: a decline of 17 attractions since 2014. The response rates for this year and previous two years are given in Table 2.1 below:

Table 2.1: Response rate

	2014	2013	2012
Total attractions mailed	478	478	481
Attractions completing the survey	146 (30%)	173 (36%)	190 (40%)
Attractions unable to provide figures	9 (2%)	10 (2%)	25 (5%)
TOTAL RESPONSE RATE	**155** **(32%)**	**183** **(38%)**	**215** **(47%)**

Therefore, while the response to the survey this year was 32%, the proportion actually providing visitor figures stands at 31% (down 5% on the 2013 response rate).

Furthermore, in order to ascertain the reliability of visits figures provided, 135 operators indicated which methods they used to calculate their figures: results are shown in Table 2.2 below. The figures amount to more than 100% as multiple methods are mentioned by some attractions.

Table 2.2: Visitor numbers – recording method

Method used 2014	Number of attractions	% of attractions providing data
Ticket sales and / or group booking sales	76	56.2%
Manual counting	47	34.8%
Mechanical / electronic counting	49	36.3%
Estimate made on the basis of sample count	4	3.0%
Other *	13	9.6%

Base: attractions providing data on counting methods (135)
* Other methods include data based on previous monitoring devices, online sales and visitor book entries
NB: more than one recording method can be recorded

3. Top ten free and paid attractions

3.1 Top ten paid attractions

The paid attraction reporting the highest number of visitors in 2014 was The LC, located in Swansea (774,617 visitors). This was also the most visited paid attraction in 2012 and 2013: visitor numbers increased by 8.7% in 2014 from 712,616 in 2013.

The majority of the top 10 visited attractions in 2014 were located in North Wales (7 out of 10) and 4 of the 10 were privately owned. Others were evenly divided between local authority, National Trust and Cadw owned properties.

These top ranking attractions were comprised of a mix of themed and wildlife attractions, country parks, historic properties and railways / tramways.

The top 10 paid attractions providing data for 2014 received a total of 2.7 million visitors, accounting for over half (52.5%) of all visits made to paid attractions in 2014 - see Table 3.1 below for more details.

Table 3.1: Top ten paid attractions 2014

	Name	Region	Category	Owner	Location	No. of visits 2014	No. of visits 2013	% change	£ Adult
1	The LC	SWW	THEME	PO	C	774,617	712,616	+8.7%	£7.00
2	Folly Farm Adventure Park	SWW	WL	PO	R	485,936	419,614	+15.8%	£10.25
3	Cardiff Castle	SEW	HP	LA	U	272,327	NP*	-	£12.00
4	Bodnant Garden	NW	CP	NT	R	191,015	178,102	+7.3%	£10.50
5	Conwy Castle	NW	HP	Cadw	C	186,486	174,920	+6.6%	£6.75
6	Great Orme Tramway	NW	R/T	LA	C	179,042	169,943	+5.4%	£6.50
7	Caernarfon Castle	NW	HP	Cadw	C	176,609	163,394	+8.1%	£6.75
8	Welsh Mountain Zoo and Botanical Gardens	NW	WL	PO	U	153,612	135,729	+13.2%	£9.95
9	Snowdon Mountain Railway	NW	R/T	PO	R	131,144	110,378	+18.8%	£31.00
10	Erddig	NW	HP	NT	R	129,733	147,291	-11.9%	£10.30

* NP = not provided

3.2 Top ten free attractions

Amongst the free admittance attractions providing data in 2014, the Wales Millennium Centre received the highest number of visitors (1.2 million): visitor numbers at this attraction increased in 2014 compared to 2013 by 8.6%.

Most of the top 10 free attractions were either museums and galleries (5 out of 10) or country parks (4 out of 10). The top 10 free attractions providing data for 2014 received a total of 4.7 million visitors, accounting for nearly six in ten (58.9%) of all visits made to free attractions in 2014 - see Table 3.2 below for more details.

Table 3.2: Top ten free attractions 2014

	Name	Region	Category	Owner	Location	No. of visits 2014	No. of visits 2013	% change
1	Wales Millennium Centre[2]	SEW	MAG	PO	U	1,197,566	1,102,520	+8.6%
2	St Fagans: National History Museum	SEW	MAG	NMW / G	U	564,195	544,966	+3.5%
3	Cyfarthfa Castle Museum	SEW	MAG	LA	U	481,907	524,789	-8.2%
4	National Museum Wales	SEW	MAG	NMW / G	U	442,972	456,342	-2.9%
5	Pembrey Country Park	SWW	CP	LA	C	440,000	367,172	+19.8%
6	Elan Valley Visitor Centre	MW	CP	PO	R	400,000	NP*	-
7	Snowdon Summit Visitor Centre	NW	CP	PO	R	393,432	NP*	-
8	National Waterfront Museum	SWW	MAG	NMW / G	U	262,935	253,708	+3.6%
9	St David's Cathedral	SWW	HP	PO	C	257,000	255,000	+0.8%
10	Cwmcarn Forest Drive & Visitor Centre	SEW	CP	PO	R	253,661	257,539	-1.5%

* NP = not provided

[2] The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the 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.

4. Visits 2014

This section presents an analysis of the visits data for 2014.

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

There were 13.2 million visits made to attractions in Wales participating in the survey in 2014: a higher proportion of these visits were made to free attractions (60.3%) compared to paid attractions (39.7%)

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 17 reporting 200,000 or more visitors accounted for 54.1% of all visits recorded in 2014 – see Table 4.1 below.

Table 4.1: Overall visits by admission type 2014

Admission type	Base	No. of visits 2014	% of visits
Free	64	7,971,157	60.3%
Paid	82	5,255,610	39.7%
TOTAL	**146**	**13,226,767**	100.0%

Base: attractions providing data for 2014

Participating attractions in South East Wales received the highest share of visits (39.6%), while attractions in Mid Wales received the lowest (8.2%).

For most regions, the split between free and paid visits was fairly even; the exception to this was South East Wales, where over four times as many visits were made to free attractions (4.2 million) compared to paid attractions (1.0 million) - see Table 4.2 overleaf for more details.

Table 4.2: Overall visits by admission type and Wales region 2014

Wales region	Free			Paid			ALL		
	Base	No. of visits 2014	%	Base	No. of visits 2014	%	Base	No. of visits 2014	%
Mid	7	652,411	4.9%	11	427,852	3.2%	18	1,080,263	8.2%
North	15	1,535,621	11.6%	33	1,991,966	15.1%	48	3,527,587	26.7%
South East	26	4,217,538[3]	31.9%	16	1,015,984	7.7%	42	5,233,522	39.6%
South West	16	1,565,587	11.8%	22	1,819,808	13.8%	38	3,385,395	25.6%
TOTAL	**64**	**7,971,157**	**60.3%**	**82**	**5,255,610**	**39.7%**	**146**	**13,226,767**	**100.0%**

Base: attractions providing data for 2014

NB SOME VERY SMALL BASES

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

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

- Mid Wales – roughly a tenth of attractions vs. a tenth of visits
- 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 South East Wales, there is more of a discrepancy between attraction numbers and visitor numbers. While South East Wales contains 28.8% of all attractions responding to the survey, visits to these attractions accounted for a relatively higher proportion of 39.6% of all visits in 2014.

Each attraction responding to the survey received an average of 90,594 visits in 2014: this increased to 124,608 in South East Wales, and decreased to 60,015 in Mid Wales.

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

Table 4.3: Share of attractions and visits by region 2014, plus average visitor numbers 2014 and 2013 (different samples)

Wales region	Base	% of attractions	% of visits	Average no. of visits per attraction 2014	Average no. of visits per attraction 2013
Mid	18	12.3%	8.2%	60,015	28,622
North	48	32.9%	26.7%	73,491	70,185
South East	42	28.8%	39.6%	124,608[4]	106,346
South West	38	26.0%	25.6%	89,089	70,153
TOTAL	**146**	**100.0%**	**100.0%**	**90,594**	**73,274**

Base: attractions providing data for 2014 (146) and 2013 (173)

Museums and art galleries received the highest proportion of visits overall (32.2%), followed by country parks / gardens (26.8%) and historic properties (21.2%). Meanwhile, industrial/craft attractions received the lowest proportion (3.2%).

For museums and galleries: the majority of visits to this type of attraction were to free attractions (4.2 million free vs. 99,896 paid). In contrast, for historic properties, the majority of visits were made to paid attractions (2.3 million paid vs. 476,849 free).

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

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

Table 4.4: Overall visits by admission type and attraction category 2014

Attraction category	Free			Paid			ALL		
	Base	No. of visits 2014	%	Base	No. of visits 2014	%	Base	No. of visits 2014	%
Historic property	9	476,849	3.6%	46	2,324,434	17.6%	55	2,801,283	21.2%
Museum / art gallery	26	4,152,636[5]	31.4%	7	99,896	0.8%	33	4,252,532	32.2%
Industrial / craft attraction	8	238,772	1.8%	9	188,202	1.4%	17	426,974	3.2%
Country park / garden / other natural	20	2,666,900	23.2%	8	482,174	3.6%	28	3,149,074	26.8%
Wildlife attraction	1	40,000	0.3%	4	739,589	5.6%	5	779,589	5.9%
Themed attraction / leisure park / centre	Not applicable			4	978,690	7.4%	4	978,690	7.4%
Railway / tramway	-	-	-	3	360,186	2.7%	3	360,186	2.7%
Other travel / tours / rides	-	-	-	1	82,439	0.6%	1	82,439	0.6%
TOTAL	**64**	**7,971,157**	**60.3%**	**82**	**5,255,610**	**39.7%**	**146**	**13,226,767**	**100.0%**

Base: attractions providing data for 2014

NB SOME VERY SMALL BASES

Table 4.5 below shows the relative proportions of ***attractions*** responding to the 2014 survey against the relative proportion of ***visits***, by attraction category. Historic properties and industrial / craft attractions account for just over one in three of all attractions responding to the survey (37.7%), however, visits to these types of attractions accounted for just one in five of all visits (21.2%). In contrast, museums and art galleries accounted for around one in five attractions (22.6%) but received one in three visits (32.2%).

[5] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the 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.

Themed attractions also received a proportionately higher share of visits than other types of attraction, accounting for 2.7% of participating attractions and receiving 7.4% of all visits made in 2014 – see Table 4.5 below.

Table 4.5: Share of attractions and visits by attraction category 2014, plus average visitor numbers 2014 and 2013 (different samples)

Attraction category	Base	% of attractions	% of visits	Average no. of visits per attraction 2014	Average no. of visits per attraction 2013
Historic property	55	37.7%	21.2%	50,932	46,667
Museum / art gallery	33	22.6%	32.2%	128,865[6]	90,115
Industrial / craft attraction	17	11.6%	3.2%	25,116	35,440
Country park / garden / other natural	28	19.2%	26.8%	126,610	84,954
Wildlife attraction	5	3.4%	5.9%	155,918	85,566
Themed attraction / leisure park / centre	4	2.7%	7.4%	244,673	712,616
Railway / tramway	3	2.1%	2.7%	120,062	63,569
Other travel / tours / rides	1	0.7%	0.6%	82,439	-
TOTAL	**146**	**100.0%**	**100.0%**	**90,594**	**73,274**

Base: attractions providing data for 2014 (146) and 2013 (173)

NB SOME VERY SMALL BASES

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

42.6% of the visits to attractions in Wales in 2014 were made to privately owned attractions (3.3 million to free and 2.3 million to paid).

Properties owned by local authorities received 26.5% of all visits made to participating attractions in 2014, with most of these being made to free attractions (21.5%) compared to paid attractions (5.0%). All visits to National Museum Wales attractions were free visits, as none of these attractions charge an admission fee (12.6% of all visits); as for National Trust owned properties (9.0% of all visits), the vast majority of visits were made to paid attractions (8.7%) - see Table 4.6 below for more details.

Table 4.6: Overall visits by admission type and ownership 2014

Ownership	Free			Paid			ALL		
	Base	No. of visits 2014	%	Base	No. of visits 2014	%	Base	No. of visits 2014	%
Cadw	4	107,044	0.8%	26	1,156,914	8.7%	30	1,263,958	9.6%
National Museum Wales (Government)	7	1,670,523	12.6%	-	-	-	7	1,670,523	12.6%
Local Authority	26	2,838,854	21.5%	10	666,788	5.0%	36	3,109,642	26.5%
The National Trust	1	45,300	0.3%	18	1,151,366	8.7%	19	1,196,666	9.0%
Private owner / trust	26	3,309,436[7]	25.0%	28	2,280,542	17.2%	54	5,589,978	42.3%
TOTAL	**64**	**7,971,157**	**60.3%**	**82**	**5,255,610**	**39.7%**	**146**	**13,226,767**	**100.0%**

Base: attractions providing data for 2014

NB SOME VERY SMALL BASES

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

Table 4.7 illustrates the relative proportions of ***attractions*** responding to the survey in 2013 against the relative proportion of ***visits***, by ownership.

Privately owned attractions accounted for just over a third of the sample (37.0%) and two in five visits (42.3%). In addition to this, Local Authority owned attractions accounted for around a quarter of attractions and visits (24.7% and 26.5% respectively).

While Cadw owned attractions accounted for 20.5% of the sample, they received a relatively smaller proportion of overall visits (9.6%). Conversely, National Museum Wales (Government) owned attractions accounted for just 4.8% of the sample, but 12.6% of all visits in 2014 – see Table 4.7 below for more details.

Table 4.7: Share of attractions and visits by ownership 2014, plus average visitor numbers 2014 and 2013 (different samples)

Ownership	Base	% of attractions	% of visits	Average no. of visits per attraction 2014	Average no. of visits per attraction 2013
Cadw	30	20.5%	9.6%	42,132	40,805
National Museum Wales (Government)	7	4.8%	12.6%	238,646	235,541
Local Authority	36	24.7%	26.5%	97,379	77,750
The National Trust	19	13.0%	9.0%	62,982	64,759
Private owner / trust	54	37.0%	42.3%	103,518[8]	68,356
TOTAL	**146**	**100.0%**	**100.0%**	**90,594**	**73,274**

Base: attractions providing data for 2014 (146) and 2013 (173)

NB SOME VERY SMALL BASES

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

Amongst all attractions responding to the 2014 survey, just 17 reported that they received 200,000 or more visits during the year – visits to these 17 attractions accounted for 54.1% of all visits in 2014. Most of these larger attractions did not charge admissions (14) and received nearly seven in ten of all visits to free attractions (70.5%). The three paid attractions with high visit numbers accounted for a relatively smaller proportion of all paid visits (29.2%).

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 4.8 below for more details.

Table 4.8: Overall visits by admission type and range of total visits 2014

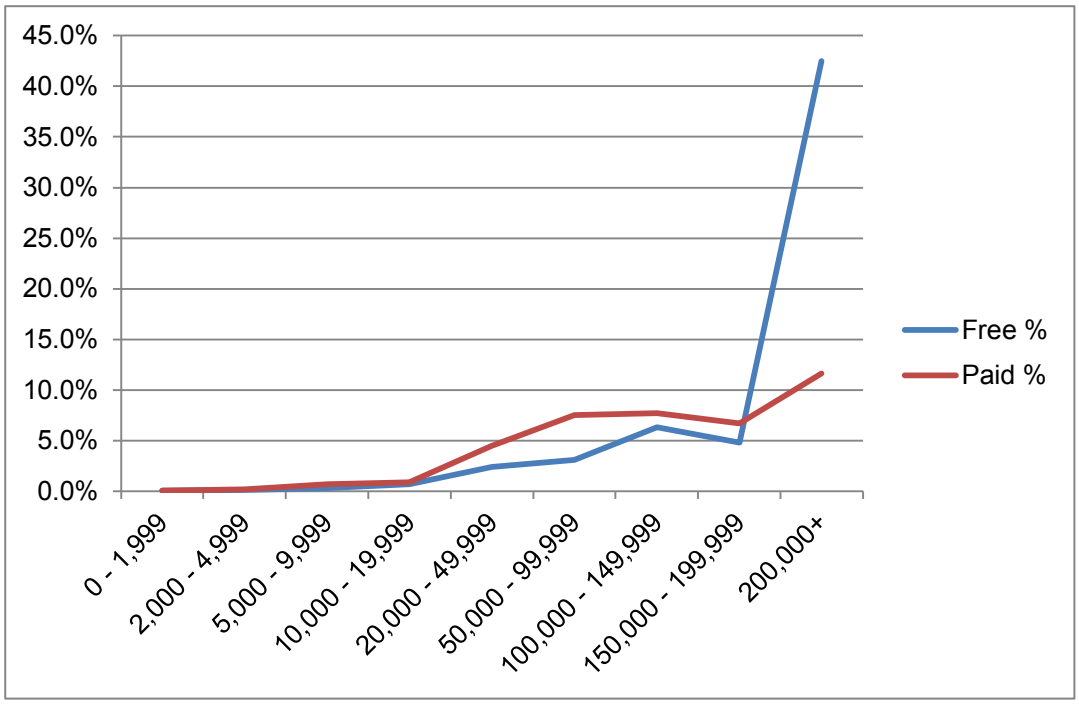
Range of total visits	Free			Paid			ALL		
	Base	No. of visits 2014	%	Base	No. of visits 2014	%	Base	No. of visits 2014	%
0 – 1,999	4	2,340	<0.1%	1	1,720	<0.1%	5	4,060	<0.1%
2,000 – 4,999	6	17,845	0.1%	8	29,655	0.2%	14	47,500	0.4%
5,000 – 9,999	6	45,525	0.3%	13	86,291	0.7%	19	131,816	1.0%
10,000 – 19,999	7	98,455	0.7%	9	120,827	0.9%	16	219,282	1.7%
20,000 – 49,999	11	362,310	2.4%	20	592,332	4.5%	31	954,642	6.9%
50,000 – 99,999	6	406,912	3.1%	14	990,029	7.5%	20	1,396,941	10.6%
100,000 – 149,999	7	828,520	6.3%	9	1,015,112	7.7%	16	1,843,632	13.9%
150,000 – 199,999	4	633,830	4.8%	5	886,764	6.7%	9	1,520,594	11.5%
200,000 and over	13	5,619,420[9]	42.5%	3	1,532,880	11.6%	16	6,712,300	54.1%
TOTAL	**64**	**7,971,157**	**60.3%**	**82**	**5,255,610**	**39.7%**	**146**	**12,830,767**	**100.0%**

Base: attractions providing data for 2014 - **NB SOME VERY SMALL BASES**

[9] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the 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.

Figure 5.8a below 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 2014



Base: attractions providing data for 2014: free (64), paid (82)

5. Comparative analysis of visits to tourist attractions 2014 / 2013

This section of the report looks at trends in the number of visits to attractions in Wales, comparing 2014 and 2013 visit figures. Please note that this section only relates to those attractions that provided data **in both years**.

5.1 Overall comparisons

Amongst those attractions responding to the survey in both years (106 in total), visit numbers increased by 5.6% between 2013 and 2014 – see Table 5.1 below.

Table 5.1: Comparison of overall yearly visit figures 2014 / 2013

Base	No. of visits 2014	No. of visits 2013	Percentage change
106	11,127,660	10,533,956	+5.6%

Base: attractions providing data for both 2014 and 2013

Analysing the data in more detail; the number of visits to both free and paid attractions increased in 2014 compared to the previous year by (4.9% free, 6.9% paid) - see Table 5.2 below.

Table 5.2: Comparison of overall yearly visit figures 2014 / 2013 by admission type

Admission type	Base	No. of visits 2014	No. of visits 2013	Percentage change
Free	51	6,899,309[10]	6,576,858	+4.9%
Paid	55	4,228,351	3,957,098	+6.9%
TOTAL	**106**	**11,127,660**	**10,533,956**	**+5.6%**

Base: attractions providing data for both 2014 and 2013

[10] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the 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.

Visitor numbers increased in all regions of Wales: South West and Mid Wales saw the largest increases in visits to attractions (both paid and free) in 2014 compared to 2013 (+11.0% and +9.2% respectively). Visitor numbers also increased in North Wales by 5.9% and South East Wales by 1.7% - see Table 5.3 below.

Table 5.3: Comparison of overall yearly visit figures 2014 / 2013 by Wales region

Wales region	Base	No. of visits 2014	No. of visits 2013	Percentage change
Mid	10	552,714	506,212	+9.2%
North	36	3,034,532	2,866,801	+5.9%
South East	33	4,500,028[11]	4,422,980	+1.7%
South West	27	3,040,386	2,737,963	+11.0%
TOTAL	**106**	**11,127,660**	**10,533,956**	**+5.6%**

Base: attractions providing data for both 2014 and 2013

There was a significant increase of 54.2% in visits to industrial and craft attractions in 2014 (up to 335,407 from 217,579). There were also increases in numbers for all other categories of attraction, noticeably wildlife attractions (+15.0%) and country parks (+11.5%) – see Table 5.4 below.

Table 5.4: Comparison of overall yearly visitor figures 2014 / 2013 by attraction category

Attraction category	Base	No. of visits 2014	No. of visits 2013	Percentage change
Historic properties	43	2,288,359	2,219,236	+3.1%
Museum / art gallery	26	4,114,046	4,084,430	+0.7%
Industrial / craft attraction	8	335,407	217,579	+54.2%
Country park / garden / other natural	22	2,575,497	2,385,981	+7.9%
Wildlife attraction	3	679,548	590,959	+15.0%
Themed attraction / leisure park / centre	1	774,617	712,616	+8.7%
Railway / tramway	3	360,186	323,155	+11.5%
TOTAL	**106**	**11,127,660**	**10,533,956**	**+5.6%**

Base: attractions providing data for both 2014 and 2013

NB SOME VERY SMALL BASES

[11] This figure includes The Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for … theatrical … performances', and does not neatly fall into the classification of an attraction, as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the 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.

Looking at the data by ownership: visits to privately owned attractions increased by the highest proportion between 2013 and 2014 (+10.7%). Visit numbers to local authority, Cadw, National Museum Wales and National Trust attractions saw more modest increases (approximately 1% to 3%) – see Table 5.5 below.

Table 5.5: Comparison of overall yearly visitor figures 2014 / 2013 by ownership

Ownership	Base	No. of visits 2014	No. of visits 2013	Percentage change
Cadw	26	1,186,542	1,143,713	+3.7%
National Museum Wales (Government)	7	1,670,523	1,648,790	+1.3%
Local Authority	29	3,081,707	2,991,407	+3.0%
The National Trust	15	1,020,901	986,095	+3.5%
Private owner / trust	29	4,167,987[12]	3,763,951	+10.7%
TOTAL	**106**	**11,127,660**	**10,533,956**	**+5.6%**

Base: attractions providing data for both 2014 and 2013

NB SOME VERY SMALL BASES

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

5.2 Comparison of admission charges for paid attractions

Adult admission charges for paid attractions rose slightly in 2014, from an average of £7.72 in 2013 to £7.85 (1.7% increase): average child admission charges remained relatively unchanged (+0.6%). While these increases are fairly modest, they are marginally higher than the UK rate of inflation in 2014 (+1.2%) – see Table 5.6 below.

Table 5.6: Comparison of adult and child average admission charges (per paid attraction) 2014 / 2013

Average admission charge	2014	2013	Change
Adult	£7.85	£7.72	+1.7%
Child	£4.88	£4.85	+0.6%

Base: all paid attractions providing data for both 2014 and 2013 (17)

There have been no significant changes in the distribution of admission charges by charging band in 2014 compared to 2013. Table 5.7 below shows how the highest proportion of paid attractions still fall into the £8.00 and over category (29.4%), although please note that these figures are based on a very small sample size (17) and should therefore be treated with caution.

Table 5.7: Distribution of adult admission charges by range 2014 / 2013

Average admission charge	2014	2013
Less than £1.00	-	-
£1.01 - £1.99	5.9%	5.9%
£2.00 - £2.99	-	5.9%
£3.00 - £3.99	17.6%	11.8%
£4.00 - £4.99	17.6%	23.5%
£5.00 – £5.99	11.8%	5.9%
£6.00 - £6.99	11.8%	5.9%
£7.00 - £7.99	5.9%	5.9%
£8.00 and over	29.4%	35.3%

Base: all paid attractions providing data for both 2014 and 2013 (17)

Average admission charges for paid attractions were highest in Mid Wales (£8.29 adult; £4.77 child), and lowest in South West Wales (£5.07 adult; £3.53 child) – see Table 5.8 below.

Table 5.8: Average admission charges by Wales region

Attraction category	Base	Average adults admission	Average child admission
Mid	11	£8.29	£4.77
North	33	£6.25	£3.89
South East	16	£5.62	£3.79
South West	22	£5.07	£3.53
TOTAL	**82**	**£6.10**	**£3.89**

Base: all paid attractions providing data for 2014

In terms of attraction category, average admission charges for railways and tramways were highest (£18.50 adult; £10.67 child). The lowest average admissions were charged at paid museums and galleries in 2014 (£4.12 adult; £2.42 child) - see Table 5.9 below.

Table 5.9: Average admission charges by attraction category

Attraction category	Base	Average adults admission	Average child admission
Historic property	46	£5.22	£3.37
Museum / art gallery	7	£4.12	£2.42
Industrial / craft attraction	9	£5.59	£3.17
Country park / garden / other natural	8	£5.52	£2.98
Wildlife attraction	4	£10.23	£8.86
Themed attraction / leisure park / centre	4	£7.25	£5.05
Railway / tramway	3	£18.50	£10.67
Other travel / tours / rides	1	£12.00	£7.00
OVERALL AVERAGE	**82**	**£6.10**	**£3.89**

Base: all paid attractions providing data for 2014

Moreover, in terms of attraction ownership, average admission charges for privately owned attractions were highest (£7.57 adult; £4.78 child), followed by National Trust attractions (£6.85 adult; £3.35 child).

The lowest average admissions were charged at Cadw-owned attractions in 2014 (£4.27 adult; £3.23 child) - see Table 5.10 below.

Table 5.10: Average admission charges by ownership

Attraction category	Base	Average adults admission	Average child admission
Cadw	26	£4.27	£3.23
Local Authority	10	£5.52	£4.09
The National Trust	18	£6.85	£3.35
Private owner / trust	28	£7.57	£4.78
OVERALL AVERAGE	**80**	**£6.10**	**£3.89**

Base: all paid attractions providing data for 2014

6. Operations

6.1 Gross revenue movement

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

Comparing the information on gross revenue provided by attractions responding in both 2014 and 2013, the position was much more positive in 2014, no doubt due to an increase in visitor numbers. Nearly half (47.2%) of participating attractions reported an increase in gross revenue (vs. 36.8% in 2013).This compares to 35.2% reporting a similar level of gross revenue (relatively unchanged from 36.8% reported in 2013) and around a sixth (17.6%) saying their revenue had decreased (down from 26.3% in 2013) – see Table 6.1 below.

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

Gross revenue change	2014 / 2013 % attractions	2013 / 2012 % attractions
Base	108	95
Down	17.6%	26.3%
Similar	35.2%	36.8%
Up	47.2%	36.8%

Base: all attractions providing data for 2014 and 2013

Looking at the data in a slightly different way, i.e. comparing like-for-like data from attractions that responded in **both** 2014 **and** 2013, there is very little movement in revenue: although a smaller proportion reported a decrease in revenue for the most recent survey (19.5% compared to 26.8% in 2013), a slightly higher proportion of attractions reported that their revenue had remained the same (41.5% vs. 36.6% in 2013). Similar proportions (around a third) reported an increase in revenue – see Table 6.2 below for more details.

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

Admission type	2014 / 2013 % attractions	2013 / 2012 % attractions
Down	19.5%	26.8%
Similar	41.5%	36.6%
Up	39.0%	36.6%

Base: all attractions providing data for both and 2014/2013 and 2013/2012 (41)

Overall, there was an average increase in gross revenue of 9.1% in 2014, which is higher than the increase on 3.4% seen in 2013. Where revenue had changed, most reported fairly marginal increases / decreases of between 1% and 10%).

Table 6.3 below illustrates how this in more detail, and shows the proportions of attractions reporting increases/decreases in 2014 against 2013.

Table 6.3: Average revenue movement by range 2014 / 2013 (different samples)

Gross revenue movement range	2014 % of visits	2013 % of visits
-50% or more	1.0%	1.2%
-21% to -50%	2.1%	1.2%
-11% to -20%	6.2%	8.6%
-1% to -10%	7.2%	14.8%
0% (no change)	38.1%	43.2%
+1% to +10%	21.6%	9.9%
+11% to +20%	15.5%	11.1%
+21% to +50%	7.2%	8.6%
+50% or more	1.0%	1.2%
AVERAGE TREND	**+9.1%**	**+3.4%**

Base: all attractions providing data for 2014 (97) and 2013 (81)

Museums and art galleries reported the highest increase in gross revenue in 2014 (+25.6%): this is significantly higher than the figure reported in 2013 (+0.2%).

Railways and tramways also reported a fairly high increase in gross revenue in 2014 compared to 2013 (+17.3%) – for all other types of attractions, increases were more moderate, but none reported a decrease in annual gross revenue.

Pease note that the sample of attractions contributing data in 2014 and 2013 is different - see Table 6.4 below.

Table 6.4: Average revenue movement by attraction category 2014 / 2013 (different samples)

Attraction category	2014 average revenue movement	2013 average revenue movement
Historic property	+3.0%	+2.0%
Museum / art gallery	+25.6%	+0.2%
Industrial / craft attraction	+3.3%	-1.5%
Country park / garden / other natural	+6.3%	+3.1%
Wildlife attraction	+3.3%	+26.6%
Themed attraction / leisure park / centre	+1.0%	-3.0%
Railway / tramway	+17.3%	-5.0%
Other travel / tours / rides	0.0%	-
TOTAL	**+9.1%**	**+3.4%**

Base: all attractions providing data for 2014 (97) and 2013 (81)

6.2 Employment 2013

Attraction operators were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2014. While all attractions responded to this part of the survey, it should be borne in mind that some attractions gave estimates on employee numbers.

In contrast to previous years, full-time staff accounted for the largest proportion of employees in the sector (36.8%, up from 26.3% in 2013). Unpaid volunteers made up 33.5% of employees in the sector, with the remaining 29.6% comprising of part-time employees - see Table 6.5 below.

Table 6.5: Total employees reported in 2014

Attraction category		No. of employees	%
Permanent	Full-time	743	28.7%
	Part-time	433	16.7%
	Unpaid volunteers	252	9.7%
Seasonal	Full-time	210	8.1%
	Part-time	333	12.9%
	Unpaid volunteers	615	23.8%
TOTAL		**2,586**	**100.0%**

Base: all attractions providing data for 2014 (146)

The profile of employees by attraction type varies considerably.

Themed attractions and railways/tramways largely employed permanent staff (72.6% and 64.3% respectively); for other types of attraction the split between permanent and seasonal staff was more evenly divided - see Table 6.6 below.

Table 6.6: Total employees by attraction category reported in 2014

Attraction category	Base		Permanent				Seasonal			
			FT	PT	UV	TOTAL	FT	PT	UV	TOTAL
Historic property	55	No.	65	61	63	189	20	46	90	156
		%	18.8%	17.7%	18.3%	54.8%	5.8%	13.3%	26.1%	45.2%
Museum / art gallery	33	No.	264	118	64	446	12	16	273	301
		%	35.3%	15.8%	8.6%	59.7%	1.6%	2.1%	36.5%	40.3%
Industrial / craft attraction	17	No.	30	36	15	81	5	57	3	65
		%	20.5%	24.7%	10.3%	55.5%	3.4%	39.0%	2.1%	44.5%
Country park / garden / other natural	28	No.	80	73	50	203	31	43	175	249
		%	17.7%	16.2%	11.1%	44.9%	6.9%	9.5%	38.7%	55.1%
Wildlife attraction	5	No.	132	17	60	209	96	115	54	265
		%	27.8%	3.6%	12.7%	44.1%	20.3%	24.3%	11.4%	55.9%
Themed attraction / leisure park / centre	4	No.	100	107	-	207	12	46	-	78
		%	35.1%	37.5%	-	72.6%	4.2%	16.1%	-	27.4%
Railway / tramway	3	No.	69	3	-	72	34	6	-	40
		%	61.6%	2.7%	-	64.3%	30.4%	5.4%	-	35.7%
Other travel, tours, rides	1	No.	3	18	-	21	-	4	-	4
		%	12.0%	72.0%	-	84.0%	-	16.0%	-	16.0%
TOTAL	**146**		**743**	**433**	**252**	**1,428**	**210**	**333**	**615**	**1,158**

Base: all attractions providing data for 2014
FT = full-time; PT = part-time; UV = unpaid volunteer
NB SOME VERY SMALL BASES

Table 6.7 below shows how numbers of employees has changed between 2013 and 2014. Please note that these are different samples, and do not reflect exact like-to-like changes amongst the same attractions.

Since 2013, there has been a drop of 22.6% in the number of employees at participating attractions. The most significant changes are amongst unpaid volunteers: while the number of permanent unpaid volunteers has decreased by 73.7%, the number of seasonal unpaid volunteers has increased by 58.5% – see Table 6.7 below.

Table 6.7: Total employees reported in 2014 and 2013 (different samples)

Employee type		No. of employees 2014	No. of employees 2013	% change
Permanent	Full-time	743	864	-14.0%
	Part-time	433	572	-24.3%
	Unpaid volunteers	252	958	-73.7%
Seasonal	Full-time	210	207	+1.4%
	Part-time	333	370	-10.0%
	Unpaid volunteers	615	388	+58.5%
TOTAL		**2,586**	**3,340**	**-22.6%**

Base: all attractions providing data for 2014 (146) and 2013 (107)

6.3 Marketing expenditure 2014 / 2013

Most attractions participating in the 2014 research did not increase their marketing expenditure in 2014 compared to 2013 (76.6%), while equal proportions of around one in ten reported to have either increased or decreased their marketing spend (10.9% saying down, 12.5% saying up) - see Table 6.8 below.

Table 6.8: Marketing expenditure levels – 2014 vs. 2013

Admission type	No. of attractions	% attractions
Base	**128**	**100.0%**
Down	14	10.9%
Similar	98	76.6%
Up	16	12.5%

Base: all attractions providing data for 2014

7. Visitor profile 2014

For all attraction types, the majority of visitors were adults (71.2%): railways and tramways received the highest proportion of adult visitors (80.0%), while wildlife attractions received the highest proportion of child visitors (46.8%): these figures are consistent with the 2013 data – see Table 7.1 below.

Table 7.1: Proportion of adult and child visits by attraction category 2014

Attraction category	Base	Average % adult visits	Average % child visits
Historic property	55	74.0%	26.0%
Museum / art gallery	33	73.3%	26.7%
Industrial / craft attraction	17	75.5%	24.5%
Country park / garden / other natural	28	69.3%	30.7%
Wildlife attraction	**5**	53.3%	46.8%
Themed attraction / leisure park / centre	**4**	56.3%	43.8%
Railway / tramway	**3**	80.0%	20.0%
Other travel / tours / rides	**1**	80.0%	20.0%
TOTAL	**146**	**71.2%**	**28.8%**

Base: all attractions providing data for 2014

NB SOME VERY SMALL BASES

Just under half of visitors to attractions in Wales in 2014 were local visitors (46.7%), with a similar proportion residing in the rest of the UK (44.8%): 8.5% were overseas visitors.

Historic properties received a higher than average proportion of overseas visitors (12.2%), while wildlife attractions received a higher than average proportion of local visitors (68.4%). Railways and tramways were most likely to attract visitors from the rest of the UK (77.5%) - see Table 7.2 below.

Table 7.2: Origin of visitors by attraction category 2014

Attraction category	Base	Average % overseas visitors	Average % local visitors	Average % visitors from rest of UK
Historic property	55	12.2%	29.9%	57.9%
Museum / art gallery	33	9.6%	55.5%	34.9%
Industrial / craft attraction	17	9.2%	35.3%	55.5%
Country park / garden / other natural	28	5.8%	56.2%	38.0%
Wildlife attraction	5	3.4%	68.4%	28.2%
Themed attraction / leisure park / centre	4	2.7%	51.7%	45.7%
Railway / tramway	3	5.0%	17.5%	77.5%
Other travel / tours / rides	1	30.0%	40.0%	30.0%
TOTAL	**146**	**8.5%**	**46.7%**	**44.8%**

Base: attractions providing data in 2014 - **NB SOME VERY SMALL BASES**

Most of the visitors to attractions in Wales in 2014 were day visitors (77.7%), with just 22.3% staying in the area overnight or as part of a longer visit. None of the themed attractions responding to the survey reported receiving any staying visitors (100.0% were day visitors only), while historic properties reported receiving the highest proportion of staying visitors (36.7%) - see Table 7.3 below.

Table 7.3: Day visitors and staying visitors by attraction category 2014

Attraction category	Base	Average % day visitors	Average % staying visitors
Historic property	55	63.3%	36.7%
Museum / art gallery	33	80.2%	19.8%
Industrial / craft attraction	17	86.5%	13.5%
Country park / garden / other natural	28	77.7%	22.3%
Wildlife attraction	**5**	92.0%	8.0%
Themed attraction / leisure park / centre	**4**	100.0%	0.0%
Railway / tramway	**3**	78.3%	21.7%
Other travel / tours / rides	**1**	60.0%	40.0%
TOTAL	**146**	**77.7%**	**22.3%**

Base: attractions providing data in 2014 - **NB SOME VERY SMALL BASES**

8. Alphabetical list of attractions responding to the survey 2014

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2014 VISITS	2013 VISITS	% CHANGE	£ ADULT ADMISSION
1940's Swansea Bay	SWW	MAG	PO	U	10,327*	NP	-	£5.95
Aberconwy House	NW	HP	PO	C	20,110	20,383	-1.3%	£4.00
Aberdulais Falls	SWW	CP	NT	R	24,912	23,767	4.8%	£4.50
Amlwch Copper Kingdom	NW	IND	PO	C	7,400*	NP	-	£4.50
Amlwch Heritage Centre	NW	MAG	PO	C	6,700*	NP	-	£2.95
Beaumaris Castle	NW	HP	Cadw	C	87,045	83,823	3.8%	£5.25
Beaumaris Court House	NW	HP	LA	R	3,915	NP	-	£3.60
Beaumaris Gaol	NW	HP	LA	C	8,543	NP	-	£4.80
Big Pit: National Coal Museum	SEW	MAG	NMW / G	R	147,073	147,980	-0.2%	-
Blaenafon Cheddar Co & Mountain Tours	SEW	IND	PO	R	5,475	NP	-	£2.50
Blaenavon Ironworks	SEW	HP	Cadw	R	23,127	18,601	24.3%	-
Blaina Museum & Heritage Centre	SEW	MAG	PO	U	2,018	1,600	26.1%	-
Bodnant Garden	NW	CP	NT	R	191,015	178,102	7.3%	£10.50
Bodrhyddan Hall	NW	HP	PO	R	2,097	1,287	62.9%	£5.00
Brecon Beacons Waterfalls Centre	SWW	CP	PO	R	24,550	22,634	8.5%	-
Brickfield Pond	NW	CP	LA	R	69,256*	79,018	-12.4%	-
Bronze Bell Collection (Sailors Institute)	MW	MAG	LA	U	2,978*	2,879	3.4%	-
Brynmawr and District Museum	SEW	MAG	PO	U	3,668	3,197	14.7%	-
Caerleon Roman Baths and Amphitheatre	SEW	HP	Cadw	R	56,657	52,747	7.4%	-
Caernarfon Castle	NW	HP	Cadw	C	176,609	163,394	8.1%	£6.75
Caerphilly Castle	SEW	HP	Cadw	U	108,576	110,687	-1.9%	£5.50
Cantref Adventure Farm	MW	WL	PO	R	37,260*	NP	-	£8.75
Cardiff Castle	SEW	HP	LA	U	272,327	NP	-	£12.00
Cardiff Museum Project	SEW	MAG	LA	U	129,348*	156,862	-17.5%	-
Carew Castle & Tidal Mill	SWW	HP	LA	R	39,138	33,961	15.2%	£4.75
Carmarthenshire County Museum	SWW	MAG	LA	R	12,615	12,616	0.0%	-
Carreg Cennen Castle	SWW	HP	Cadw	R	20,495	18,822	8.9%	£4.00
Castell Coch	SEW	HP	Cadw	R	68,534	74,021	-7.4%	£5.50
Castell Henllys Iron Age Fort	SWW	HP	LA	R	25,274	25,175	0.4%	£4.75
Chepstow Castle	SEW	HP	Cadw	R	57,905	52,163	11.0%	£4.50
Chirk Castle	NW	HP	NT	R	125,865	129,862	-3.1%	£10.90
Cilgerran Castle (Cadw)	SWW	HP	Cadw	U	20,495	NP	-	£3.50
City Sightseeing Tours	SEW	OTH	PO	U	82,439	NP	-	£12.00
Colby Woodland Garden	SWW	CP	NT	R	37,950	33,263	14.1%	£5.40
Conwy Castle	NW	HP	Cadw	C	186,486	174,920	6.6%	£6.75
Conwy Nature Reserve	NW	CP	PO	U	75,085	76,649	-2.0%	£3.00
Conwy Suspension Bridge	NW	HP	NT	C	16,582	15,055	10.1%	£1.00
Corris Mine Explorers	MW	IND	PO	R	1,720*	NP	-	£11.00
Cosmeston Lakes Country Park	SEW	CP	LA	U	245,000*	245,000	0.0%	-
Cosmeston Medieval Village	SEW	CP	LA	U	40,000*	16,200	146.9%	£3.00
Craft in the Bay	SEW	MAG	PO	U	100,712	NP	-	-
Criccieth Castle	NW	HP	Cadw	R	43,815	41,096	6.6%	£3.50
Cwmcarn Forest Drive & Visitor Centre	SEW	CP	PO	R	253,661	257,539	-1.5%	-
Cyfarthfa Castle Museum	SEW	MAG	LA	U	481,907	524,789	-8.2%	-
Denbigh Castle	NW	HP	Cadw	R	12,342	13,497	-8.6%	£3.50
Dingle Local Nature Reserve	NW	CP	LA	C	60,000*	68,256	-12.1%	-
Dolaucothi Gold Mines	SWW	IND	NT	R	18,154	18,946	-4.2%	£7.00
Dolforwyn Castle	MW	HP	Cadw	R	5,610	NP	-	-
Dolwyddelan Castle	NW	HP	Cadw	R	5,495	4,383	25.4%	£2.80
Dyffryn Gardens	SEW	CP	NT	R	69,679	NP	-	£7.40
Dylan Thomas Boathouse	SWW	HP	LA	R	32678*	NP	-	£4.20
Elan Valley Visitor Centre	MW	CP	PO	R	400,000*	NP	-	-
Electric Mountain	NW	IND	PO	R	150,000*	38,717	287.4%	-
Erddig	NW	HP	NT	R	129,733	147,291	-11.9%	£10.30
Felin Cochwillan Watermill	NW	IND	PO	R	36	35	2.9%	-
Folly Farm Adventure Park	SWW	WL	PO	R	485,936	419,614	15.8%	£10.25
Garwnant Visitor Centre	SEW	CP	NT	U	45,300*	38,530	17.6%	-
Glassblobbery	NW	IND	PO	R	15,575*	NP	-	-
Great Orme Family Golf	NW	CP	PO	U	5,466*	NP	-	£4.50
Great Orme Mines	NW	IND	PO	C	29,225	NP	-	£6.75
Great Orme Tramway	NW	R/T	LA	C	179,042	169,943	5.4%	£6.50
Harlech Castle	MW	HP	Cadw	C	76,628	76,355	0.4%	£4.25
Holyhead Breakwater Country Park	NW	CP	LA	R	120,000*	116,593	2.9%	-
Judge's Lodging	MW	HP	PO	U	11,959	NP	-	£7.50
Kenfig Nature Reserve	SEW	CP	LA	R	10,326	12,165	-15.1%	-
Kidwelly Castle	SWW	HP	Cadw	R	29,661	NP	-	£4.00
King Arthur's Labyrinth	MW	THEME	PO	R	60,000*	NP	-	£9.35
Kymin (The)	SEW	HP	NT	R	6,401	3,775	69.6%	£3.00

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2014 VISITS	2013 VISITS	% CHANGE	£ ADULT ADMISSION
Lamphey Bishop's Palace	SWW	HP	Cadw	R	3,856	3,673	5.0%	£3.50
Laugharne Castle	SWW	HP	Cadw	R	15,807	11,715	34.9%	£3.80
The LC	SWW	THEME	PO	C	774,617	712,616	8.7%	£7.00
Llancaiach Fawr Manor	SEW	MAG	LA	R	60,399	55,083	9.7%	£7.95
Llanerchaeron	MW	HP	NT	R	37,658	31,836	18.3%	£6.90
Llangollen Motor Museum	NW	MAG	PO	R	4,493	3,967	13.3%	£4.00
Llangollen Wharf	NW	IND	PO	C	103,000*	109,323	-5.8%	£6.50
Llynnon Mill	NW	IND	LA	R	5,472	NP	-	£3.60
Loggerheads Country Park	NW	CP	LA	R	226,752*	234,007	-3.1%	-
Manor House Wildlife Park	SWW	WL	PO	R	62,781	NP	-	£11.95
Margam Country Park	SWW	CP	LA	R	250,000*	182,055	37.3%	-
Meirion Mill	MW	IND	PO	R	36,811	24,853	48.1%	-
Milford Haven Heritage & Maritime Museum	SWW	MAG	PO	U	3,578	NP	-	£2.00
Moel Famau Country Park	NW	CP	LA	R	179,236*	151,000	18.7%	-
Moelfre Seawatch	NW	WL	LA	C	40,000	35,616	12.3%	-
Museum of Speed	SWW	MAG	LA	R	35,030	33,063	5.9%	-
National Assembly Debating Chamber	SEW	HP	PO	U	72,983	80,766	-9.6%	-
National Coracle Centre & Flour Mill	SWW	IND	PO	R	3,930	3,758	4.6%	£3.50
National Museum Wales	SEW	MAG	NMW / G	U	442,972	456342	-2.9%	-
National Roman Legion Museum	SEW	MAG	NMW / G	R	67,951	65706	3.4%	-
National Slate Museum	NW	MAG	NMW / G	R	152,594	144462	5.6%	-
National Waterfront Museum	SWW	MAG	NMW / G	U	262,935	253,708	3.6%	-
National Wool Museum	SWW	MAG	NMW / G	R	32,803	35,626	-5.5%	-
Neath Abbey	SWW	HP	Cadw	U	21,650	NP	-	-
Newport Wetlands Environmental, Educational & Visitor Centre	SEW	CP	PO	R	101,387*	96,332	5.2%	-
Newton House, Dinefwr Park & Castle	SWW	CP	NT	R	38,067	51194	-25.6%	£5.85
The Old Market Hall	MW	HP	PO	R	2,012*	2,090	-3.7%	-
Old Station	SEW	CP	LA	R	100,000	NP	-	-
Oriel Ynys Mon	NW	MAG	LA	R	80,065*	133,138	-39.9%	-
Oxwich Castle	SWW	HP	Cadw	C	6,070	6,195	-2.0%	£3.00
Parc Howard Museum and Art Gallery	SWW	MAG	LA	R	9,265	9,265	0.0%	-
Parva Farm Vineyard	SEW	CP	PO	R	5,000*	3,505	42.7%	-
Pembrey Country Park	SWW	CP	LA	C	440,000*	367,172	-88.0%	-
Pembrokeshire Candle Centre & Museum	SWW	IND	PO	R	9,650*	2,469	290.8%	-
Penrhyn Castle	NW	HP	NT	C	92,759	87,928	5.5%	£10.90
Piggery Pottery	NW	IND	PO	R	8,000*	NP	-	-
Plas Mawr Elizabethan Town House	NW	HP	Cadw	C	24,738	21,372	15.7%	£5.75
Plas Newydd	NW	HP	NT	C	111,989	92,752	20.7%	£9.35
The Play King	SWW	THEME	PO	U	120,000*	NP	-	Child admission £4.95
Pontypridd Museum	SEW	MAG	LA	U	16,488	22,667	-27.3%	-
Porthcawl Museum	SEW	MAG	PO	C	4,399	1,173	275.0%	£1.00
Porthkerry Country Park	SEW	CP	LA	R	130,000	125,000	4.0%	-
Portmeirion	MW	MAG	PO	R	204,000	193,240	5.6%	-
Powis Castle & Garden	MW	HP	NT	R	124,406	113,411	9.7%	£12.15
Raglan Castle	SEW	HP	Cadw	R	60,819	56,877	6.9%	£4.50
The Regimental Museum of the Royal Welsh	MW	MAG	PO	R	10,000*	NP	-	£5.00
Rhossili Gallery	SWW	MAG	PO	U	4,000*	NP	-	-
Rhuddlan Castle	NW	HP	Cadw	R	20,701	18,936	9.3%	£3.40
Rug Chapel	NW	HP	Cadw	R	3,387	3,325	1.9%	£3.40
Shared Earth Trust, Denmark Farm	MW	CP	PO	R	1,000*	NP	-	-
Sirhowy Ironworks	SEW	IND	LA	R	1,000*	NP	-	-
Snowdon Mountain Railway	NW	R/T	PO	R	131,144	110,378	18.8%	£31.00
Snowdon Summit Visitor Centre	NW	CP	PO	R	393,432*	NP	-	-
Solva Woollen Mill	SWW	IND	PO	C	17,700*	NP	-	-
South Stack Lighthouse	NW	IND	PO	C	13,826	19,478	-29.0%	£5.00
St Davids Bishops Palace	SWW	HP	Cadw	R	23,943	32,509	-26.3%	£3.50
St Davids Cathedral	SWW	HP	PO	C	257,000*	255,000	0.8%	-
St Fagans: National History Museum	SEW	MAG	NMW / G	U	564,195	544966	3.5%	-
St Illtyds Church	SEW	HP	LA	U	304	303	0.3%	-
Strata Florida Abbey	MW	HP	Cadw	R	6,391	4,956	29.0%	£3.50
Sugar Loaf Vineyard	SEW	CP	PO	R	8,000*	8,000	0.0%	-
Swansea Museum	SWW	MAG	LA	U	152,000*	142,734	6.5%	-
Swansea Museum - Floating Exhibits	SWW	MAG	LA	U	21,533	16,153	33.3%	-
Techniquest @ NEWI	SEW	THEME	PO	U	24,073	NP	-	£5.40
Tintern Abbey	SEW	HP	Cadw	R	68,566	67,616	1.4%	£5.50
The Tram Shed	SWW	MAG	LA	U	14,856	10,260	44.8%	-
Tredegar House	SEW	HP	NT	R	77,789	NP	-	£7.20
Tretower Court & Castle	MW	HP	Cadw	R	11,830	13,758	-14.0%	£4.75
Tudor Merchant's House	SWW	HP	NT	C	22,139	NP	-	£4.00
Ty Gwyn & Ty Crwn	NW	MAG	PO	U	3,169*	NP	-	-

ATTRACTION NAME	REGION	CATEGORY	OWNER	LOCATION	2014 VISITS	2013 VISITS	% CHANGE	£ ADULT ADMISSION
Ty Mawr Wybrnant	NW	HP	NT	R	6,158	NP	-	£3.00
The Ugly House	NW	HP	PO	U	37,506	34,648	8.2%	-
Vale of Rheidol Railway	MW	R/T	PO	C	50,000*	42,834	16.7%	£18.00
Valle Crucis Abbey	NW	HP	Cadw	R	8,117	8,438	-3.8%	£3.50
Wales Millennium Centre	SEW	MAG	PO	U	1,197,566*	1,102,520	8.6%	-
Welsh Mountain Zoo and Botanical Gardens	NW	WL	PO	U	153,612	135,729	13.2%	£9.95
White Castle	SEW	HP	Cadw	R	8,603	9,834	-12.5%	£3.00
The Winding House	SEW	MAG	LA	U	10,895	10,434	4.4%	-