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Visits to Tourist Attractions in Wales 2012

Report for Visit Wales

Visits to Tourist Attractions in Wales – 2012
Research on behalf of Visit Wales

Claire Peate

beaufortresearch

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

For further information please contact:
Krishan Kawol
Tourism Research
Knowledge and Analytical Services
Welsh Government
QED Centre, Treforest Industrial Estate
Pontypridd, Rhondda Cynon Taf, CF37 5YR

Tel: 01443 845750
Email: krishan.kawol@wales.gsi.gov.uk
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Glossary of acronyms and how to read the tables

Visit Wales would like to thank all representatives and operators in the attraction sector who 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 2012, at the end of the report. If an attraction has estimated figures in 2012 it is assumed figures for previous years are also based on estimates.

Admission

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

- If an attraction has an admission charge, the adult admission charge for high season 2012 is given. If this is not known the charge is left blank.

Abbreviations

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

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

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

Tourist attraction categories

HP	Historic Properties Castles, Forts, Historic Houses, Palaces, Historic Monuments, Archaeological Sites, Other Historic Properties, Heritage Centres, Places of Worship
Theme	Leisure 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

Employee Abbreviations

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

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

Executive Summary

Visits 2011-2012

1. **Visits to tourist attractions between 2011 and 2012 have decreased by 5.3%** amongst matched samples across the two years. Amongst the 157 attractions visits totalled nearly 11.5 million.
2. **Visits to free attractions have remained fairly consistent** with a decline of just 0.5%. Visits to paid attractions however have decreased by an average of 10.2%.
3. **The decline in visit numbers to paid attractions is most evident in South West Wales** and those under LA ownership.
4. **The most-visited paid admission attraction in Wales is The LC** with nearly 740,000 visits in 2012.

Revenue

5. **The average adult admission charge stands at £6.92 (up 4.6% on 2011)** while the average child admission charge stands at £4.07 (an increase of 3.6%). These represent above-inflation rises.
6. **Amongst all attractions (paid admission and free) average revenue stands at £6.51:** £2.93 amongst free attractions and £9.26 amongst paid admission attractions.

Employment

7. **Unpaid volunteers account for nearly 44%** of the workforce at attractions in 2012. Full time permanent staff account for 23%.

1 Introduction and objectives

1.1 Background

Visit Wales (VW) 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.

1.2 Tourist attraction definition

This research uses the definition of a tourist attraction[1] agreed by the four National Tourist Boards in 2001 :

> *"an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education, rather than being primarily a retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc. and must be receiving revenue directly from the visitors."*

1.3 Objectives

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

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[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.

1.4 Economic and climatic background to 2012

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

Looking first at the economic background, during 2012 the UK had dipped back into recession during the early part of the year, emerged from recession by the fourth quarter and narrowly avoided falling into a triple-dip recession in early 2013. Issues that were relevant to 2011 (high fuel prices, increased cost of living in general) remain relevant in 2012. As in 2011 the media continued to report on the rise of the *staycation* – that is, the substitution of a holiday abroad for a holiday in the UK for financial reasons. The staycation effect may well contribute positively to visit numbers to Welsh (and of course UK-based) visitor attractions. However, the positive effect could be tempered with a squeeze in household disposable income: paid attractions may well have been impacted by this with free attractions potentially benefitting.

Turning to the climate, according to the Met Office, 2012 was the second wettest year on record with flooding in many parts of the country. In the media the key tourist months were known as the “lost summer” due to low temperatures and high rainfall.

2 Methodology

2.1 Conducting the research

The research took place in two stages, depending on whether the attraction had seasonal opening times (early) or was open throughout the duration of the year (late). For early attractions the mailout was October 2012, with a reminder two weeks after mailout for non-responders. For late attractions, the mailout took place in January 2013, with reminders sent out two weeks after mailout for non-responders.

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

The final returns from the above fieldwork were received in March, 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 432 attractions believed to fit the tourist attraction definition: a decline of 46 attractions since 2011. The response rates for this year and previous two years are given in Table 2.1 below:

Table 2.1 Response rate

	2012 Actual (percentage)	2011 Actual (percentage)	2010 Actual (percentage)
Total number of mailable attractions	432	478	507
Attractions completing survey and providing visitor figures in that year	190 (44%)	216 (45%)	219 (43%)
Attractions not able to give visitor figures	25 (6%)	29 (6%)	28 (6%)
TOTAL RESPONSE RATE	**215 (50%)**	**245 (51%)**	**247 (49%)**

Thus, while the response to the survey this year was 50% - the proportion actually providing visitor figures stands at 44%.

Furthermore, in order to ascertain the reliability of visit figures provided, in 2012 a total of 125 operators indicated which methods they used to calculate their visit figures. Results are shown in Table 2.2 below. The figures amount to above 100% as multiple methods are mentioned by some attractions.

Table 2.2 Visitor recording method

Total sample	Actual numbers **125**	%
Ticket sales and/or group booking sales	50	40.0%
Manual method of counting numbers	41	32.8%
Mechanical or electronic method of counting	30	24.0%
Estimate made on the basis of sample count	7	5.6%
Sample count	0	0%
Other*	17	12.8%

*Other methods of recording visitor numbers include pebbles in bowls and traffic counter at entrance.

3 Top ten free and paid attractions (by volume of visits)

3.1 Top ten paid attractions

Table 3.1 Top ten paid attractions responding in 2012

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012 VISITS		2011 VISITS	2012/2011	£ ADULT
The LC	SW	Theme	PO	C	736,949		708,180	4.1%	
Pembrey Country Park	SW	CP	LA	C	388,416	*	398,115	-2.4%	
Cardiff Castle	SE	HP	LA	U	251,860				
Portmeirion	M	MAG	PO	R	195,276		234,098	-16.6%	£10.00
Caernarfon Castle	N	HP	Cadw	C	176,454		196,944	-10.4%	
Conwy Castle	N	HP	Cadw	C	162,665		178,639	-8.9%	
Great Orme Tramway	N	RT	LA	C	153,004				£5.90
Bodnant Garden	N	CP	NT	R	152,439		170,929	-10.8%	
Erddig	N	HP	NT	R	150,818		168,281	-10.4%	
Techniquest	SE	MAG	PO	U	148,561		167,849	-11.5%	£7.00

3.2 Top ten free attractions

Table 3.2 Top ten free attractions responding in 2012

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012 VISITS		2011 VISITS	2012/2011
Wales Millennium Centre	SE	MAG	PO	U	1,144,628	*	1,046,958	9.3%
St Fagans: National History Museum	SE	MAG	G	U	615,855		610,074	0.9%
Cyfarthfa Castle Museum	SE	MAG	LA	U	545,006			
National Museum Wales	SE	MAG	G	U	459,806		411,730	11.7%
National Waterfront Museum	SW	MAG	G	U	267,362		256,471	4.2%
St Davids Cathedral	SW	HP	PO	C	258,000	*	262,000	-1.5%
Cosmeston Lakes Country Park	SE	CP	LA	U	250,000		230,000	-8.7%
Cwmcarn Forest Drive & Visitor Centre	SE	CP	PO	R	203,662		192,243	5.9%
Oriel Plas Glyn-Y-Weddw	NW	MAG	PO	U	180,548		121,870	48.1%
Cardiff Museum Project	SE	MAG	LA	U	167,413	*	270,000	-38.0%

4 Comparative analysis of visits to tourist attractions 2012/2011

This chapter analyses trends in the number of visits to attractions in Wales. It looks at those attractions that responded in both 2012 and 2011.

4.1 Overall comparisons

Table 4.1 Comparison of overall yearly visits 2012/2011

157 attractions provided total visits figures for both 2012 and 2011.

Sample	Visits 2012	Visits 2011	Increase/ decrease
157	**11,436,129**	**12,080,601**	**-5.3%**

In the years 2011 and 2012 visitor volumes dropped an average of 5.3% amongst attractions that responded both years.

Table 4.2 Comparison of yearly visits 2012/2011 for free and paid attractions

Sample		Visits 2012	Visits 2011	Increase/ decrease
Free	64	6,036,233	6,067,381	-0.5%
Paid	93	5,399,863	6,013,220	-10.2%
Total	**157**	**11,436,129**	**12,080,601**	**-5.3%**

While visits to free attractions have remained consistent between 2011 and 2012 it is visits to paid attractions where the decline is most marked: a decrease of 10.2%.

Table 4.3 Comparison of yearly visits 2012/2011 by region

Sample		Visits 2012	Visits 2011	Increase/ decrease
Mid	27	939,055	1,066,630	-9.1%
North	41	2,684,627	2,888,793	-7.1%
S East	41	4,466,420	4,456,879	+0.2%
S West	48	3,316,027	3,668,299	-9.6%
Total	**157**	**11,436,129**	**12,080,601**	**-5.3%**

South West Wales and Mid Wales saw the highest declines in visit numbers, receiving around 10% fewer visits in 2012 compared to 2011. North Wales attractions also saw a dip in visit numbers (-7.1%), while in South East Wales, the number of visits to attractions remained consistent with the previous year.

Table 4.4 Comparison of yearly visits 2012/2011 by category

Sample		Visits 2012	Visits 2011	Increase/ decrease
Historic properties	49	2,349,666	2,500,076	-6.0%
Museum/ art gallery	48	4,342,937	4,296,510	+1.1%
Industrial/ craft attraction	7*	194,189	191,366	+1.5%
Country park, garden, other natural	37	3,150,608	3,648,096	-13.6%
Wildlife attraction	8*	289,601	333,176	-13.1%
Themed attraction, leisure park/ centre **	**	**	**	**
Railway/ tramway	7*	372,179	403,197	-7.7%
Total	**157**	**11,436,129**	**12,080,601**	**-5.3%**

*caution: low base
**sample size too small and would breach confidentiality

Visits to Museums and galleries have risen by 1.1% and visits to industrial and craft attractions have risen by 1.5% between 2011 and 2012. All other categories of attraction have experienced declines in visitor numbers: most markedly those in the country park, garden, other natural category (-13.6%) and wildlife attraction (-13.1%).

Table 4.5 Comparison of yearly visits 2012/2011 by ownership

	Sample	Visits 2012	Visits 2011	Increase/ decrease
Cadw	26	1,053,907	1,1,1,047	-6.8%
Government	7*	1,739,855	1,677,275	+3.7%
Local Authority	45	2,959,963	3,501,979	-15.5%
The National Trust	17	1,042,790	1,140,540	-8.6%
Private Owner/ Trust	62	4,639,614	4,629,760	+0.2%
Total	**157**	**11,436,129**	**12,080,601**	**-5.3%**

*caution: low base

Visits to Government managed attractions have risen 3.7% between 2011 and 2012. Visits to attractions managed by private owners and trusts have remained fairly constant with a rise of just 0.2%. All other categories have experienced declines in their visitor numbers: most notably those under the ownership of Local Authorities (with a decline of 15.5%).

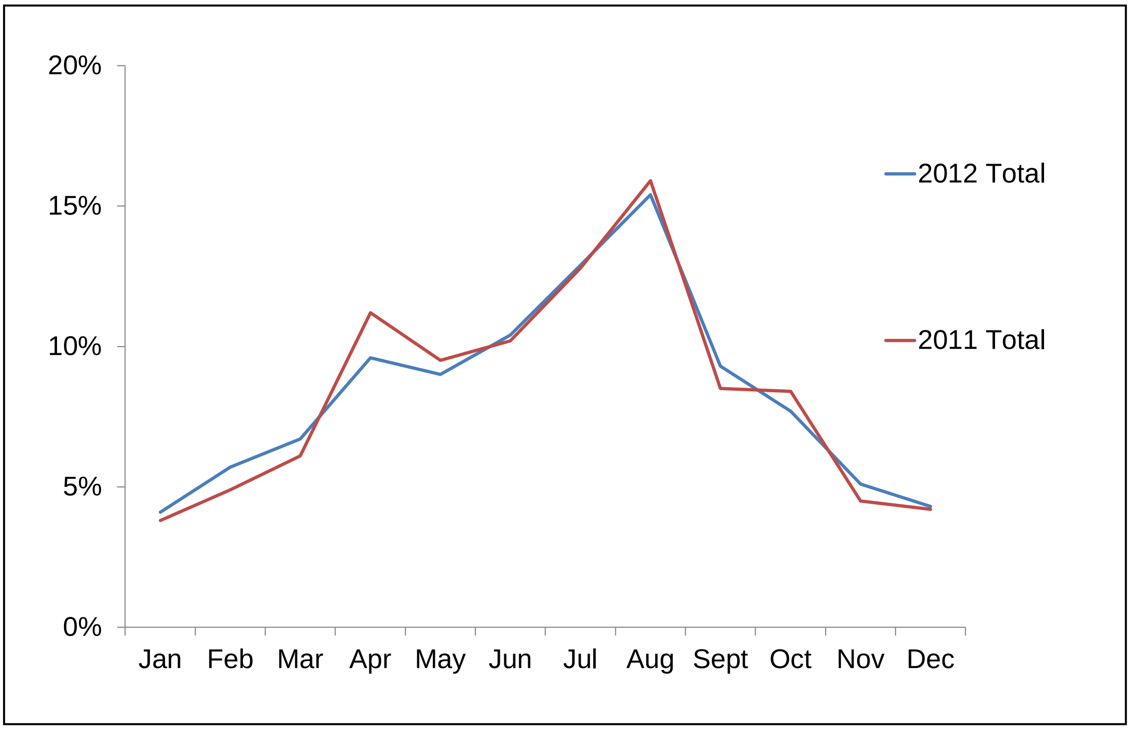
4.2 Comparison of monthly visits 2012/2011

142 visitor attractions provided a monthly breakdown of visits to their operation both in 2012 and 2011.

Table 4.6 Monthly distribution of visits 2012/2011

	Visits 2012	Visits 2011
January	4.1%	3.8%
February	5.7%	4.9%
March	6.7%	6.1%
April	9.6%	11.2%
May	9.0%	9.5%
June	10.4%	10.2%
July	12.9%	12.8%
August	15.4%	15.9%
September	9.3%	8.5%
October	7.7%	8.4%
November	5.1%	4.5%
December	4.3%	4.2%

Figure 4.6a Chart of monthly distribution of visits 2012/2011 - TOTAL



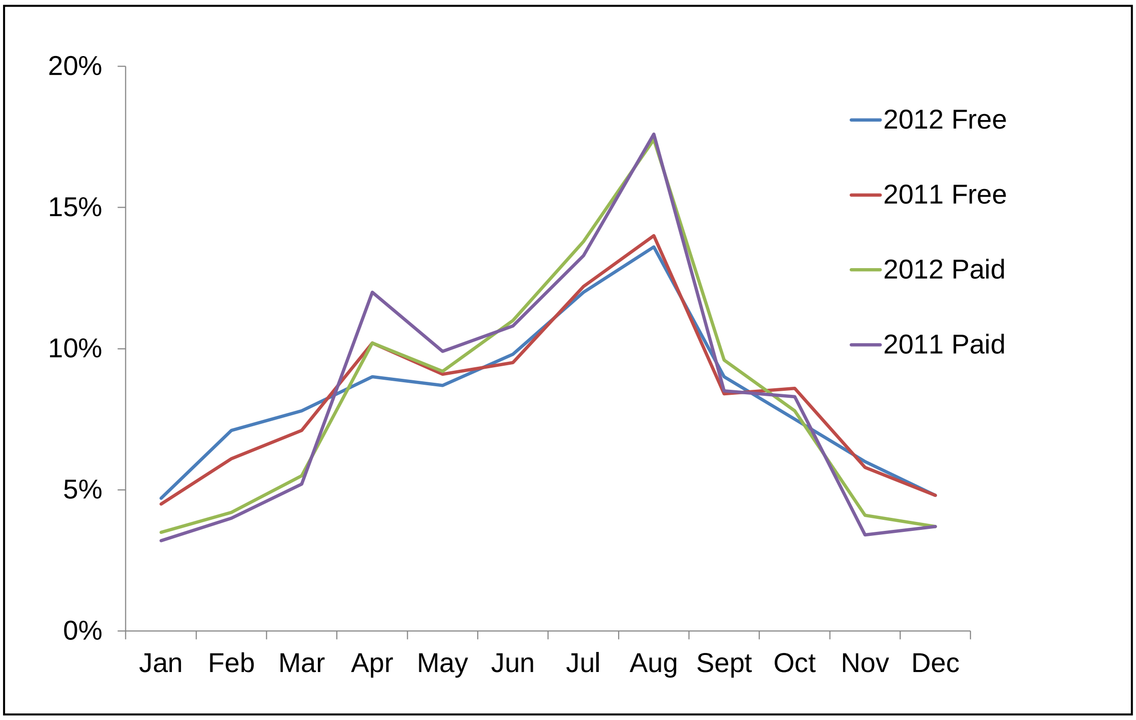
The 2012 figures indicate a very moderate 'evening out' of visitor figures across the year although the key months of July and August still experience the highest visitor volumes.

Free attractions demonstrate a more even year-round distribution of visits – particularly in 2012 – compared to 2011 – see Table 4.7 below and Figure 4.7a overleaf.

Table 4.7 Monthly distribution of visits 2012/2011 by admission

	Free		Paid	
	2012	2011	2012	2011
Sample	53		89	
January	4.7%	4.5%	3.5%	3.2%
February	7.1%	6.1%	4.2%	4.0%
March	7.8%	7.1%	5.5%	5.2%
April	9.0%	10.2%	10.2%	12.0%
May	8.7%	9.1%	9.2%	9.9%
June	9.8%	9.5%	11.0%	10.8%
July	12.0%	12.2%	13.8%	13.3%
August	13.6%	14.0%	17.4%	17.6%
September	9.0%	8.4%	9.6%	8.5%
October	7.5%	8.6%	7.8%	8.3%
November	6.0%	5.8%	4.1%	3.4%
December	4.8%	4.8%	3.7%	3.7%

Figure 4.7a Chart of monthly distribution of visits 2012/2011 by admission type



4.3 Comparison of quarterly visits 2012/2011

Table 4.8 Quarterly distribution of visits 2012/2011

	Visits 2012	Visits 2011
Sample	**142**	
Jan – Mar	16.5%	14.8%
Apr – Jun	28.9%	30.9%
Jul – Sep	37.5%	37.2%
Oct - Dec	17.0%	17.2%

The first quarter of 2012 had a slightly higher proportion of visitors than in 2011 – with Easter falling in April across both years.

Table 4.9 Quarterly distribution of visits 2012/2011 by region

		Distribution of visits 2012				Distribution of visits 2011				Total visits	
Region	**Sample**	**Q1**	**Q2**	**Q3**	**Q4**	**Q1**	**Q2**	**Q3**	**Q4**	**Jan – Dec 12**	**Jan – Dec 11**
Mid Wales	26	9.8%	31.0%	45.7%	13.5%	9.4%	33.7%	43.3%	13.6%	967,130	1,064,288
North Wales	39	12.2%	31.2%	41.4%	15.2%	10.7%	33.6%	40.8%	14.9%	2,732,590	2,876,283
SE Wales	34	18.5%	27.7%	35.1%	18.7%	17.1%	28.7%	34.6%	18.7%	4,409,402	3,740,317
SW Wales	43	19.8%	28.0%	34.8%	17.4%	17.7%	30.0%	34.8%	17.5%	2,867,973	3,183,719
Total	**142**	**16.5%**	**28.9%**	**37.5%**	**17.0%**	**14.8%**	**30.9%**	**37.2%**	**17.2%**	10,977,095	10,864,607

Mid Wales attractions show the greatest degree of fluctuation across the year with almost 36 percentage points difference between Q1 and Q3. This contrasts with South West Wales with a difference of 15 percentage points across the same quarters.

Mid and North Wales' attractions reported higher peaks in visit numbers during Q3 of 2012 (around 40% of annual visits) compared to South Wales (35% of annual visits),

Table 4.10 Quarterly distribution of visits 2012/2011 by category

Category	Sample	Distribution of visits 2012				Distribution of visits 2011				Total visits	
		Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan – Dec 12	Jan – Dec 11
Historic property	46	9.5%	32.5%	42.8%	15.2%	8.9%	33.1%	42.8%	15.2%	2,090,309	2,224,940
Museum or art gallery	44	19.9%	26.2%	34.9%	19.0%	18.2%	27.3%	34.8%	19.7%	4,495,510	3,799,642
Industrial or craft attr.	6*	4.2%	31.2%	54.8%	9.8%	5.0%	34.8%	51.6%	8.5%	159,189	162,166
Country park, garden, other natural	31	17.2%	30.4%	36.3%	16.1%	14.8%	34.1%	35.1%	15.9%	2,860,903	3,261,306
Wildlife attr.	7*	15.7%	28.6%	44.8%	10.9%	12.0%	32.1%	41.9%	14.1%	262,061	305,176
Themed attr., leisure parks & centres	-	-	-	-	-	-	-	-	-	-	-
Railway or tramway	7*	2.9%	32.9%	50.7%	13.4%	2.6%	33.6%	50.6%	13.2%	372,174	403,197
Total	**142**	**16.5%**	**28.9%**	**37.5%**	**17.0%**	**14.8%**	**30.9%**	**37.2%**	**17.2%**	10,977,095	10,864,607

*caution: low base

Museums and galleries continue to appeal year-round, and despite the second wettest summer on record, outdoor attractions such as wildlife parks, country parks and gardens demonstrate similar visitor distributions between 2011 and 2012.

4.4 Comparison of admission charges for paid attractions

Table 4.11 Comparison of adult and child average charges (per attraction) 2012/2011

	2012	2011	Increase/ decrease
Sample	**33**		
Average adult admission charge	£6.92	£6.61	+4.6%
Average child admission charge	£4.07	£3.93	+3.6%

In the UK, inflation according to the Retail Price Index stood at an average of 3.3% across 2012. The increases in admission charges therefore represent above-inflation rises at attractions in Wales.

Table 4.12 Distribution of adult admission charges by range

	2012	2011
Sample	**33**	
Less than £1.00	6.1%	6.1%
£1.01 - £1.99	6.1%	6.1%
£2.00 - £2.99	9.1%	9.1%
£3.00 - £3.99	12.1%	12.1%
£4.00 - £4.99	12.1%	12.1%
£5.00 - £5.99	6.1%	9.1%
£6.00 - £6.99	15.2%	15.2%
£7.00 - £7.99	6.1%	3.0%
£8.00 or over	27.3%	27.3%

While on the whole there has been little change in the range of admission charges between 2011 and 2012 amongst the sample of 33 attractions that completed this section of the survey, there was a reduction in the proportion of paid attractions charging between £5.00 - £5.99 (-3%), but an increase in the proportion charging £7.00 - £7.99 (+3.1%). This will be contributing to the overall ‘above inflation’ increases seen in admission charges in 2012.

5 Visits 2012

This section presents analysis of visits data for year 2012.

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

Table 5.1 Overall visits 2012 by admission

Admission	Sample	Total visits 2012
Free	81	7,114,154
Paid	109	6,181,381
Total	**190**	**13,295,535**

Amongst attractions responding to the survey, visits to free attractions accounted for just over half (54%) of all visits.

Table 5.2 Overall visits 2012 by admission and region

	Free Admission			Paid Admission			All Attractions		
Region	Sample	Total visits 2012	%	Sample	Total visits 2012	%	Sample	Total visits 2012	%
Mid Wales	15	505,187	7	21	716,977	12	36	1,222,164	9
North Wales	17	1,106,083	16	37	2,237,937	36	54	3,344,020	25
SE Wales	26	4,211,268	59	19	1,090,175	18	45	5,301,443	40
SW Wales	23	1,291,616	18	32	2,136,292	35	55	3,427,908	26
Total	**81**	**7,114,154**	**54**	**109**	**6,181,381**	**46**	**190**	**13,295,535**	

While there are a greater proportion of visitors to paid attractions in Mid, North and South West Wales than free attractions, this pattern is reversed in South East Wales with a far greater proportion of visitors to free attractions.

Table 5.3 Regions' share of attractions and visits 2012

Region	% of attractions	% of visits	Average visits per attraction per region
Sample	**190**		
Mid Wales	18.9%	9%	33,949
North Wales	28.4%	25%	61,926
SE Wales	23.7%	40%	117,810
SW Wales	28.9%	26%	62,536
Total		**13,295,535**	**69,977**

The average number of visitors per attraction stands just under 70,000 a year in 2012. Looking at the figures regionally, while South East Wales has just under 24% of the attractions it attracts 40% of all visits.

Table 5.4 Overall visits 2012 by admission and category

	Free Admission			Paid Admission			All Attractions		
Category	**Sample**	**Total visits 2012**	**%**	**Sample**	**Total visits 2012**	**%**	**Sample**	**Total visits 2012**	**%**
Historic property	5*	352,199	5	47	2,255,519	36	54	607,718	5
Museum or art gallery	44	4,529,212	64	18	523,171	8	62	5,052,383	38
Industrial or craft attraction	7*	166,980	2	6*	293,970	5	13	460,950	3
Country park, garden, other natural	20	1,917,467	27	23	1,627,492	26	43	3,544,959	27
Wildlife attraction	4*	131,596	2	6*	165,797	3	10	297,393	2
Themed attraction, leisure park/ centre	0	0	0	1**	-	-	1**	-	-
Railway or tramway	1**		-	8*	578,486	9	9*	-	-
Total	**81**	**7,114,154**	**54**	**109**	**6,181,381**	**46**	**190**	**13,295,535**	

*caution: low base
**sample size too small and would breach confidentiality

Across all paid and free categories of attraction, free admission museums and art galleries have the greatest proportion of visitors, with over a third (34%) of all visits to these attractions in Wales.

Table 5.5 Average visits 2012 by category

Category	Sample	Average visits 2012
Historic property	52	50,148
Museum or art gallery	62	81,490
Industrial or craft attraction	13	35,458
Country park, garden, other natural	43	82,441
Wildlife attraction	10	29,739
Themed attraction, leisure park/ centre	1*	736,949
Railway or tramway	9*	66,131
Total	**190**	**69,977**

*caution: low base

Wildlife attractions have the lowest visit numbers, with just under 30,000 on average across 2012. This compares to museums / art galleries and country parks / gardens with over 80,000 visits across the same period.

Table 5.6 Overall visits 2012 by admission and ownership

Ownership	Free Admission Sample	Free Admission Total visits 2012	Paid Admission Sample	Paid Admission Total visits 2012	All Attractions Sample	All Attractions Total visits 2012
Cadw	0	0	26	1,053,907	26	1,053,907
Government	7*	1,739,855	0	0	7*	1,739,855
Local authority	32	2,425,260	20	1,588,833	52	4,014,093
National Trust	1*	4,411	16	1,038,379	17	1,042,790
Private owner or trust	41	2,944,628	47	2,500,262	88	5,444,890
Total	**81**	**7,114,154**	**109**	**6,181,381**	**190**	**13,295,535**

*caution: low base

Over five million visits were made to attractions under private ownership in Wales in 2012. This compares to just over one million for attractions managed by Cadw and nearly two million for attractions managed by the Welsh Government.

Table 5.7 Average visits 2012 by ownership

Ownership	Sample	Average visits 2012	Average visits 2011
Cadw	26	40,535	42,551
Government	7*	248,551	239,611
Local authority	52	77,194	75,970
National Trust	17	61,341	66,178
Private owner or trust	88	61,873	71,244
Total	**190**	**489,494**	**495,554**

*caution: low base

As in previous years, Government attractions have by far the highest average number of visits, with nearly a quarter of a million, on average, in 2012.

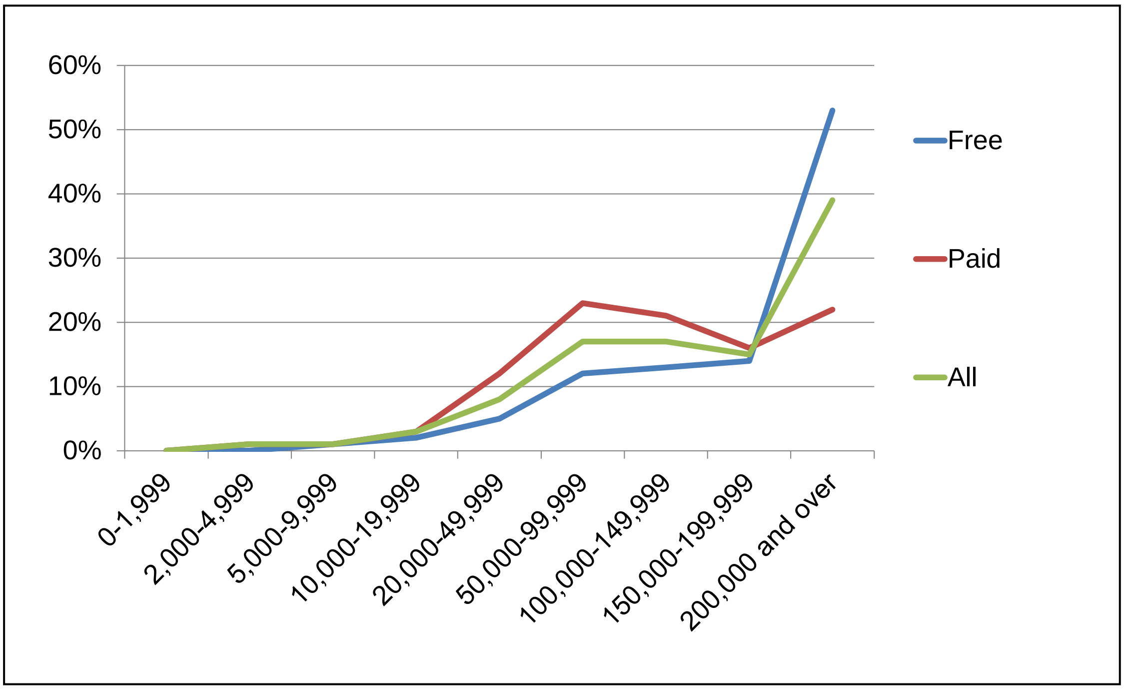
Table 5.8 Overall visits 2012 by range of visits and admission

	Free Admission			Paid Admission			All Attractions		
Range of visits	**Sample**	**Total visits 2012**	**%**	**Sample**	**Total visits 2012**	**%**	**Sample**	**Total visits 2012**	**%**
0-1,999	10	12,003	-	10	8,047	-	20	20,050	-
2,000-4,999	9*	32,107	-	12	40,604	1	21	72,711	1
5,000-9,999	6*	49,911	1	12	91,965	1	18	141,876	1
10,000-19,999	12	168,653	2	11	167,994	3	23	336,647	3
20,000-49,999	12	332,005	5	24	759,911	12	36	1,091,916	8
50,000-99,999	11	875,218	12	20	1,431,074	23	31	2,306,292	17
100,000-149,999	7*	923,087	13	11	1,313,905	21	18	2,236,992	17
150,000-199,999	6*	976,851	14	6*	990,656	16	12	1,967,507	15
200,000 and over	8*	3,744,319	53	3*	1,377,225	22	11	5,121,544	39
Total	**81**	**7,114,154**	**54**	**109**	**6,181,381**	**46**	**190**	**13,295,535**	

*caution: low base

Eleven attractions responding to the survey reported visitor figures of 200,000 or more in 2012: of these, eight were free admission attractions and three were paid admission attractions – see Figure 5.8a below for relative proportions of attractions per range of visits.

Figure 5.8a Overall visits 2012 by range of visits and admission



6 Operations

6.1 Gross revenue movement

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

Table 6.1 Gross revenue movement 2012/2011 (different samples)

Gross revenue movement	2012/2011	2011/2010
Sample	**104**	**77**
Down	28.8%	41.5%
Similar	44.2%	16.9%
Up	26.9%	41.6%

For just over 44% of attractions, the gross revenue was at a similar level in 2012 compared to 2011. Almost 29% reported a reduction in gross revenue, while nearly 27% reported an increase.

Table 6.2 Average gross revenue movement 2012/2011 (same sample)

Gross revenue movement	2012/2011	2011/2010
Sample	**67**	
Down	50.7%	17.9%
Similar	22.4%	35.8%
Up	26.9%	46.3%

Looking at the like-for-like gross revenue of attractions responding in both 2011 and 2012, a greater proportion reported seeing a decrease in gross revenue in 2011/12 (51%) compared to those seeing an increase (27%).

Table 6.3 Average revenue movement 2012/2011 by band

Gross revenue movement band	Sample	2012/2011 %	2011/2010
Over -50% decrease	0	0%	0.0%
-21% to -50% decrease	11	12.5%	2.1%
-11% to -20% decrease	9*	10.2%	5.2%
-1% to -10% decrease	16	18.2%	12.4%
0% (no change)	28	31.8%	43.3%
1% to 10% increase	15	17.0%	22.7%
11% - 20% increase	5*	5.7%	10.3%
21% - 50% increase	4*	4.5%	2.1%
Over 50% increase	0	0%	2.1%
Total	**88**	**-2.8%**	**+2.1%**

*caution: low base

On the whole, there was an average reduction of gross revenue in 2012 of -2.8%, compared to 2011 when there was an average increase of 2.1%.

Table 6.4 Average revenue movement 2012/2011 by category

Category	Sample	2012/2011	2011/2010
Historic property	4*	-6.8%	+1.1%
Museum or art gallery	19	+0.9%	+1.7%
Industrial or craft attraction	8*	-3.9%	-0.1%
Country park, garden, other natural	19	-9.7%	+2.6%
Wildlife attraction	3*	+1.0%	-0.7%
Themed attr., leisure parks and centres	0	-	-3.7%
Railway or tramway	7*	-2.9%	+8.9%
Total	**60**	**-4.04%**	**+2.1%**

*caution: low base

Amongst the sample of attractions that reported upwards / downwards movement those in the category *country park, garden, other natural* were most likely to report a drop, with an average of almost -10%.

6.2 Average revenue per visitor (£) 2012

Attraction operators were asked to provide the average revenue (including VAT) per visitor, i.e. the total spend per category divided by total visitors to the attraction overall. In total 91 attractions provided the breakdown of such information.

Notes to understand the average revenue:

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

Please note: a number of attractions did not provide this level of information and therefore some sample sizes in this section are small.

Table 6.5 Average visitor revenue per attraction by category

Region		Sample	Admissions	Donations	Catering	Retail	Car park	Other	Total
Historic property	Free	2*	£0.00	£0.25	£0.00	£0.50	£0.00	£0.75	£1.50
	Paid	5*	£3.36	£0.06	£0.90	£1.49	£0.00	£5.81	£11.61
Museum / gallery	Free	19*	£0.00	£0.42	£0.05	£0.79	£0.05	£0.00	£1.31
	Paid	10	£2.44	£1.63	£0.33	£1.19	£0.00	£0.20	£5.78
Industrial / craft	Free	4*	£0.00	£0.13	£1.64	£3.94	£0.00	£0.16	£5.86
	Paid	5*	£6.92	£0.00	£2.96	£1.75	£0.00	£0.06	£11.69
Country park or garden	Free	8*	£0.00	£0.14	£1.94	£3.03	£0.46	£0.65	£6.13
	Paid	13	£3.58	£0.16	£1.32	£1.64	£0.00	£0.13	£6.84
Wildlife	Free	2*	£0.00	£0.13	£0.88	£0.29	£0.00	£0.00	£1.29
	Paid	5*	£6.33	£0.04	£2.64	£1.61	£0.00	£0.24	£10.87
Themed	Free	-	-	-	-	-	-	-	-
	Paid	1**	-	-	-	-	-	-	-
Railway or tram	Free	1*	£0.00	£0.00	£0.00	£0.39	£0.00	£1.93	£2.32
	Paid	8*	£9.77	£0.09	£1.81	£1.58	£0.05	£0.69	£13.90
Total average	**Free**	**36**	**£0.00**	**£0.29**	**£0.69**	**£1.58**	**£0.13**	**£0.25**	**£2.93**
	Paid	**47**	**£5.01**	**£0.42**	**£1.44**	**£1.49**	**£0.01**	**£0.92**	**£9.26**

*caution: low base
** Sample size too small and would breach confidentiality

Average admission prices vary considerably between types of attractions – while paid museums / galleries charge an average admission fee of £2.44, railway and tram attractions charge four times this amount (£9.77). As would be expected, the average revenue for visitors to paid attractions is significantly higher than that of visitors to free attractions; these free attractions are unable to make up the difference in average revenue through other sources such as catering, car parks and retail.

Table 6.6 Average visitor revenue per attraction by region

Region	Sample	Admissions	Donations	Catering	Retail	Car park	Other	Total
Mid Wales	20	£3.61	£0.14	£1.35	£1.84	£0.16	£0.43	£7.53
North Wales	23	£4.13	£0.28	£1.64	£1.62	£0.01	£0.96	£8.63
South East Wales	13	£1.94	£1.32	£0.90	£1.09	£0.05	£0.15	£5.46
South West Wales	27	£1.59	£0.14	£0.59	£1.44	£0.04	£0.69	£4.47
Average	**83**	**£2.84**	**£0.36**	**£1.11**	**£1.53**	**£0.06**	**£0.62**	**£6.51**

The total average revenue per visitor is highest for attractions in North Wales, standing at £8.63. This compares to attractions in South West Wales with an average visitor revenue of £4.47.

Table 6.7 Average visitor revenue per attraction by region and admission

Region		Sample	Admissions	Donations	Catering	Retail	Car park	Other	Total
Mid Wales									
	Free	6*	£0.00	£0.22	£0.88	£1.78	£0.50	£0.10	£3.48
	Paid	14	£5.16	£0.10	£1.55	£1.87	£0.01	£0.57	£9.27
North Wales									
	Free	8*	£0.00	£0.70	£1.03	£2.04	£0.00	£0.82	£4.60
	Paid	15	£6.33	£0.05	£1.96	£1.39	£0.01	£1.03	£10.78
South East Wales									
	Free	9*	£0.00	£0.12	£1.03	£1.12	£0.08	£0.00	£2.35
	Paid	4*	£6.31	£4.02	£0.62	£1.01	£0.00	£0.50	£12.46
South West Wales									
	Free	13	£0.00	£0.18	£0.14	£1.53	£0.08	£0.12	£2.04
	Paid	14	£3.06	£0.10	£1.00	£1.35	£0.00	£1.21	£6.73
	Average								
	Free	**36**	**£0.00**	**£0.29**	**£0.69**	**£1.58**	**£0.13**	**£0.24**	**£2.93**
	Paid	**47**	**£5.01**	**£0.42**	**£1.44**	**£1.49**	**£0.01**	**£0.90**	**£9.26**

*caution: low base

Visitor attractions with the lowest average revenue per visitor are those which are free admission and based in South West Wales (£2.04 average revenue). Attractions with the highest average revenue per visitor are paid admission attractions in South East Wales with an average of £12.45.

6.3 Workforce 2012

Attraction operators were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2012. A total of 124 attractions responded to this part of the survey. It should be borne in mind that some attractions gave estimates on employee numbers and – particularly with railway and tramway attractions – these can be substantial numbers.

Table 6.8 Total workforce reported in 2012

Employment type	Sample 124	%
Full time permanents	768	23.0%
Full time seasonals	209	6.3%
Part time permanents	377	11.3%
Part time seasonals	520	15.6%
Unpaid volunteers permanent	538	16.1%
Unpaid volunteers seasonal	928	27.8%
Total	**3,340**	

Unpaid seasonal volunteers are the largest segment of employment, accounting for nearly 28% of all employees. This is followed by full time permanent staff – at 23%.

Table 6.9 Total workforce reported in 2012 by category

	Total number of employees								% of employees						
Category	**Sam-ple**	**FTP**	**FTS**	**PTP**	**PTS**	**UVP**	**UVS**	**Total**	**%FTP**	**%FTS**	**%PTP**	**%PTS**	**%UVP**	**%UVS**	**Sam-ple**
Historic property	10	8	3	16	35	12	59	133	6.0%	2.3%	12.0%	26.3%	9.0%	44.4%	100%
Museum or art gallery	46	349	56	136	53	232	134	960	36.4%	5.8%	14.2%	5.5%	24.2%	14.0%	100%
Industrial or craft attr.	12	57	21	17	154	4	15	268	21.3%	7.8%	6.3%	57.5%	1.5%	5.6%	100%
Country park, garden, other natural	36	183	28	111	181	155	238	896	20.4%	3.1%	12.4%	20.2%	17.3%	26.6%	100%
Wildlife attraction	10	24	12	13	52	125	41	267	9.0%	4.5%	4.9%	19.5%	46.8%	15.4%	100%
Themed attr. Leisure park/ centre	1**	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Railway or tramway	9*	86	89	14	45	10	441	685	12.6%	13.0%	2.0%	6.6%	1.5%	64.4%	100%
Total	124	767	209	377	520	538	928	3,340	**23.0%**	**6.3%**	**11.3%**	**15.6%**	**16.1%**	**27.8%**	100%

*caution: low base
**Sample too small: would breach confidentiality

The attractions with the greatest proportion of full time permanent staff are museums and art galleries – with over 36% of all employees in full time employment. This compares to historic properties where just 6% re full time permanent staff.

Table 6.10 Total workforce 2012/2011

	2012	2011	%2012/2011
Sample	**78**		
Full time permanents	592	611	-3.1%
Full time seasonals	158	126	+25.4%
Part time permanents	283	305	-7.2%
Part time seasonals	300	491	-38.9%
Unpaid volunteers permanent	511	341	+49.9%
Unpaid volunteers seasonal	580	709	-18.9%

Full time seasonal employment has risen by just over 25% while seasonal part time and seasonal unpaid volunteers has gone down. The largest rise of any workforce category was unpaid permanent volunteers: a rise of nearly 50% between 2011 and 2012.

Table 6.11 Recruitment difficulties 2012

Recruiting difficulties	Sample	%
Yes	14	11.2%
No	86	68.8%
N/A (no recruitment carried out)	25	20.0%
Total	**125**	

The majority of attractions did not have difficulty recruiting in 2012. Just 25% had difficulty, with varied reasons:

Lack of interest
Difficult to find local part time staff Welsh speaking
Shortage of skills and hours not to everyone's liking
Difficult in recruiting the correct person to work as the cook in our café.
Hard to find the right mix of motivation and skill level.
Hard to get Welsh speakers

Table 6.12 Retaining difficulties 2012

Retaining difficulties	Sample	%
Yes	9	10.0%
No	90	90.0%
Total	**99**	

Nine in ten attractions did not have difficulty retaining staff during 2012. Reasons for retention difficulties were:

Rural location and wage competition
Recruited highly qualified people to front of house team
Age
Career change
Retirements
Seasonal work

6.4 Marketing expenditure 2012/2011

Table 6.13 Marketing expenditure levels in 2012 compared with 2011

Marketing expenditure levels	Sample	%
Down	19	15.2%
Similar	87	69.6%
Up	19	15.2%
Total	**125**	

Of the 125 attractions responding to this element of the survey nearly seven in ten reported that their marketing expenditure levels in 2012 were similar to those in 2011.

6.5 Language services

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

Table 6.14 Provision of information and/or tours in Welsh in 2012 and 2011

	2012 Welsh	2013 Welsh
Sample	**92**	**84**
No	4.3%	4.8%
Yes	95.6%	95.2%

In 2012 nearly all (96%) attractions responding to the section on language provision provided information and/or tours in Welsh. This remained fairly consistent looking ahead to 2013 (different sample).

Table 6.15 Provision of information and/or tours in foreign languages in 2012 and 2011

	2012		2013	
	French	German	French	German
Sample	**25**	**20**	**22**	**21**
No	20.0%	25.0%	27.0%	28.6%
Yes	80.0%	75.0%	72.7%	71.4%

Of the few attractions responding to the section on French and German language provision the majority offer these languages and will offer them in 2013.

6.6 Improvements/ upgrades 2012

Attraction operators were asked to indicate whether they had made any kind of upgrade or improvement to their attraction in 2012 (excluding normal repairs and upkeep).

Table 6.16 Improvements / upgrade in 2012

Did upgrade/ improvements	Sample	%
Yes	56	44.8%
No	69	55.2%

Just over half of all businesses did not upgrade or improve their venue in 2012.

Of the 47 businesses that *did* upgrade, the values ranged from £450 to £2.4 million. The one business reporting an upgrade value of £2.4m brought the average upgrade figure to £101,973 for the year; the average figure for upgrade figure excluding this one business was £52,016.

7 Visitor profile 2012

108 respondents indicated the proportion of their visitors that were adults and proportion that were children.

Table 7.1 Proportion of adult and child visitation by category

Category	Sample	Average % adults	Average % children
Historic property	8*	76.1%	23.9%
Museum or art gallery	43	76.5%	23.5%
Industrial or craft attraction	12	70.6%	29.4%
Country park, garden, other natural	24	70.6%	29.4%
Wildlife attraction	8*	53.1%	46.9%
Themed attracts, leisure parks & centres	1*	70.0%	30.0%
Railway or tramway	9*	69.8%	30.2%
Total	108	71.9%	28.1%

*caution: low base

Wildlife attractions report the largest proportion of children – accounting for just under half (47%) of their visitors. Children are least represented in museums and galleries and historic properties.

Table 7.2 Origin of visitors by category

Category	Sample	Average % overseas	Average % locals	Average % other UK
Historic property	3*	19.0%	25.0%	56.0%
Museum or art gallery	32	6.8%	64.7%	28.5%
Industrial or craft attraction	11	8.4%	37.5%	54.1%
Country park, garden, other natural	28	5.3%	55.7%	39.0%
Wildlife attraction	7*	3.9%	49.3%	46.9%
Themed attracts, leisure parks & centres	0	-	-	-
Railway or tramway	7*	11.6%	23.4%	65.0%
Total	**88**	**7.1%**	**52.6%**	**40.3%**

*caution: low base

Historic properties attract the greatest proportion of overseas visitors (19%), followed by railways and tramways (12%).

Table 7.3 Proportion of school visits by category

Category	Sample	School visits 2012	Total visits 2012	% school visits
Historic property	10	16,650	428,855	3.9%
Museum or art gallery	42	111,224	3,050,428	3.6%
Industrial or craft attraction	8*	13,146	396,472	3.3%
Country park, garden, other natural	31	103,695	2,851,421	3.6%
Wildlife attraction				
Themed attracts, leisure parks & centres	1**	-	-	-
Railway or tramway	9*	26,960	595,183	4.5%
	101	**289,810**	**8,337,929**	**3.5%**

*caution: low base
** Base too small and would breach confidentiality

On average school visits contributed towards 3.5% of all visits in 2012 amongst those attractions responding to this question. School visits made up a greater proportion of total visits amongst railways and tramways (4.5%) and least at industrial or craft attractions (3.3%).

Table 7.4 Group bookings

Category	Sample	Average group bookings
Historic property	10	91.3
Museum or art gallery	28	50.8
Industrial or craft attraction	10	89
Country park, garden, other natural	25	52.1
Wildlife attraction	7*	29.4
Themed attracts, leisure parks & centres	1**	-
Railway or tramway	9*	205.3
	90	**74.7**

*caution: low base
** Base too small and would breach confidentiality

On average attractions had just under 75 group bookings during 2012. These ranged from 1 – 787. Railways and tramways had the largest proportion of group bookings at 205 on average per year.

8 Attractions responding in 2012 (alphabetical order)

Below are the attractions responding to the 2012 survey who have given visit figures.

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
1940's Swansea Bay	SWW	MAG	PO	U	10,058	*	9,500	5.9%	£5.75
4 New York Cottages	NW	MAG	LA	C	800	*			
Aberconwy House	NW	HP	NT	C	25,276		25,546	-1.1%	
Aberdulais Falls	SWW	CP	NT	R	26,472		25,962	2.0%	
Abergavenny Museum & Castle	MW	MAG	PO	U	23,862				
Aberglasney Gardens	SWW	CP	PO	R	26,214		32,683	-19.8%	
Abertillery & District Museum	SEW	MAG	PO	U	10,000	*	7,000	42.9%	
Aberystwyth University, School of Art Gallery and Museum	MW	MAG	PO	U	14,000	*	27,000	-48.1%	
Afan Forest Park Visitor Centre	SWW	CP	LA	R	22,611		73,598	-69.3%	
Amelia Farm Trust	SEW	WL	PO	R	27,000	*	28,000	-3.6%	
Amgueddfa Syr Henry Jones	NW	MAG	PO	U	306		563	-45.6%	£2.00
Avondale Glass	SWW	Ind	PO	R	8,000	*			
Barmouth Sailors' Institute	MW	MAG	PO	C	3,800	*			
Beaumaris Castle	NW	HP	Cadw	C	86,864		83,780	3.7%	
Beaumaris Court House	NW	HP	LA	R	3,974				£3.70
Bersham Heritage Centre	NW	MAG	LA	U	5,103		5,546	-8.0%	
Big Pit: National Coal Museum	SEW	MAG	G	R	153,749		151,877	1.2%	
Blaenavon Community Heritage & Cordell Museum	SEW	MAG	PO	R	1,051				£1.50
Blaenavon Ironworks	SEW	HP	Cadw	R	19,899		19,893	0.0%	
Blaina Museum & Heritage Centre	SEW	MAG	PO	U	1,600	*	2,440	-34.4%	
Bodelwyddan Castle	NW	MAG	LA	R	47,525	*	56,739	-16.2%	£6.30
Bodnant Garden	NW	CP	NT	R	152,439		170,929	-10.8%	
Bodrhyddan Hall	NW	HP	PO	R	2,218	*			£5.00
Brecon Beacons Mountain Centre	MW	CP	LA	R	131,928	*	132,358	-0.3%	
Brecon Beacons Waterfalls Centre	SWW	CP	PO	R	20,357		17,413	16.9%	
Brecon Mountain Railway	SEW	R/T	PO	R	68,564		72,439	-5.3%	£11.00
Brickfield Pond	NW	CP	LA	R	68,421	*	80,000	-14.5%	
Bronze Bell Collection (Sailors Institute)	MW	MAG	LA	U	3,612	*			
Brynmawr and District Museum	SEW	MAG	PO	U	4,170		3,513	18.7%	

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
Bwlch Nant yr Arian Visitor Centre	MW	CP	PO	R	121,647	*	125,037	-2.7%	
Caerleon Roman Baths and Amphitheatre	SEW	HP	Cadw	R	58,438		54,754	6.7%	
Caernarfon Castle	NW	HP	Cadw	C	176,454		196,944	-10.4%	
Caerphilly Castle	SEW	HP	LA	U	120,273		99,805	20.5%	
Caldicot Castle	SEW	MAG	LA	R	28,644		20,010	43.1%	£3.95
Canolfan Y Plase	MW	MAG	PO	R	1,383				
Cantref Adventure Farm	MW	WL	PO	R	34,829		39,336	-11.5%	£8.00
Cardiff Castle	SEW	HP	LA	U	251,860				
Cardiff Museum Project	SEW	MAG	LA	U	167,413	*	270,000	-38.0%	
Cardigan Bay Marine Wildlife Centre	MW	WL	PO	C	16,986		21,729	-21.8%	
Carew Castle & Tidal Mill	SWW	HP	LA	R	27,530		36,533	-24.6%	£4.75
Carew Cheriton Control Tower	SWW	MAG	PO	U	761		1,794	-57.6%	£2.00
Carmarthenshire County Museum	SWW	MAG	LA	R	12,099		11,798	2.6%	
Carmarthenshire County Museum	SWW	MAG	LA	R	1,227		1,268	-3.2%	
Carreg Cennen Castle	SWW	HP	Cadw	R	13,799		23,777	-42.0%	
Castell Coch	SEW	HP	Cadw	R	70,276		69,466	1.2%	
Castell Henllys Iron Age Fort	SWW	HP	LA	R	23,937		27,881	-14.1%	£4.75
Chepstow Castle	SEW	HP	Cadw	R	54,596		63,155	-13.6%	
Chirk Castle	NW	HP	NT	R	133,268		129,775	2.7%	
Coed y Brenin Forest Park	MW	CP	PO	R	160,605	*			
Colby Woodland Garden	SWW	CP	NT	R	31,289		33,885	-7.7%	
Conwy Castle	NW	HP	Cadw	C	162,665		178,639	-8.9%	
Conwy Nature Reserve	NW	CP	PO	U	72,837		88,996	-18.2%	£2.50
Conwy Suspension Bridge	NW	HP	NT	C	21,606		19,713	9.6%	
Cosmeston Lakes Country Park	SEW	CP	LA	U	250,000		230,000	8.7%	
Craig-y-Nos Country Park	SWW	CP	PO	R	123,289		119,287	3.4%	
Criccieth Castle	NW	HP	Cadw	R	40,540		41,207	-1.6%	
Cwmcarn Forest Drive & Visitor Centre	SEW	CP	PO	R	203,662		192,243	5.9%	
Cyfarthfa Castle Museum	SEW	MAG	LA	U	545,006				
Denbigh Castle	NW	HP	Cadw	R	12,240		5,156	137.4%	
Dingle Local Nature Reserve	NW	CP	LA	C	58,410		51,238	14.0%	
Dolaucothi Gold Mines	SWW	Ind	NT	R	17,767		22,491	-21.0%	
Dolwyddelan Castle	NW	HP	Cadw	R	4,260		3,903	9.1%	
Dyfed Shires & Leisure Farm	SWW	WL	PO	R	6,006	*			£6.50

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
Dylan Thomas Boathouse	SWW	HP	LA	R	14,914		16,942	-12.0%	£4.00
Dylan Thomas Centre	SWW	MAG	LA	U	21,629		70,247	-69.2%	
Ebbw Vale Works Archive	SEW	MAG	PO	U	1,136	*	750	51.5%	
Erddig	NW	HP	NT	R	150,818		168,281	-10.4%	
Felin Cochwillan Watermill	NW	Ind	PO	R	66		30	120.0%	
Flat Holm	SEW	CP	LA	C	1,175	*	1,835	-36.0%	£22.00
Garwnant Visitor Centre	SEW	CP	PO	U	37,106	*			
Gelli Aur Country Park	SWW	CP	LA	R	106,248	*	148,029	-28.2%	
Gilfach Nature Reserve & Visitor Centre	MW	WL	PO	R	1,786				
Glansevern Hall Gardens	MW	CP	PO	R	8,059	*	4,344	85.5%	£6.00
Glasfryn Parc	NW	CP	PO	R	83,401	*			
Glassblobbery	NW	Ind	PO	R	13,815	*			
Glynn Vivian Art Gallery	SWW	MAG	LA	U	40,974		33,482	22.4%	
Great Orme Tramway	NW	R/T	LA	C	153,004				£5.90
Greenfield Valley Heritage Park	NW	CP	PO	R	26,128		28,916	-9.6%	£4.60
GreenWood Forest Park	NW	Ind	PO	R	110,198		106,269	3.7%	£10.95
Gwynedd Museum and Art Gallery	NW	MAG	LA	U	14,038		16,217	-13.4%	
Gypsy Wood Park	NW	CP	PO	R	18,000		15,717	14.5%	£6.99
Harlech Castle	MW	HP	Cadw	C	75,309		92,404	-18.5%	
Hergest Croft Gardens	MW	CP	PO	R	8,186		11,348	-27.9%	£6.00
Holyhead Breakwater Country Park	NW	CP	LA	R	63,188		116,795	-45.9%	
Inigo Jones Slateworks	NW	Ind	PO	R	24,830	*	27,330	-9.1%	£5.00
Judge's Lodging	MW	HP	PO	U	8,668		9,687	-10.5%	£6.50
Kenfig Nature Reserve	SEW	CP	LA	R	20,877		24,002	-13.0%	
Kidwelly Castle	SWW	HP	Cadw	R	26,467		25,521	3.7%	
Kymin (The)	SEW	HP	NT	R	4,411		4,638	-4.9%	
Lamphey Bishop's Palace	SWW	HP	Cadw	R	4,128		3,845	7.4%	
Laugharne Castle	SWW	HP	Cadw	R	11,192		6,565	70.5%	
Llanberis Lake Railway	NW	R/T	PO	R	64,823	*	73,539	-11.9%	£7.50
Llancaiach Fawr Manor	SEW	MAG	LA	R	53,264		59,044	-9.8%	
Llanerchaeron	MW	HP	NT	R	39,691		36,366	9.1%	
Llangollen Motor Museum	NW	MAG	PO	R	4,448		5,365	-17.1%	£3.50
Llangollen Railway	NW	R/T	PO	R	70,000	*			£12.00
Llangollen Wharf	NW	Ind	PO	R	128,791	*			£12.50

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
Llyn Llech Owain Country Park	SWW	CP	LA	R	108,625	*	178,000	-39.0%	
Llys Ednowain Heritage Centre	NW	MAG	PO	U	381				£1.00
Loggerheads Country Park	NW	CP	LA	R	164,536	*	165,392	-0.5%	
Magic of Life Butterfly House	MW	WL	PO	U	8,422		8,510	-1.0%	£6.50
Margam Country Park	SWW	CP	LA	R	105,329	*	232,693	-54.7%	
Melin Tregwynt	SWW	Ind	PO	R	35,000	*	29,200	19.9%	
Milford Haven Heritage & Maritime Museum	SWW	MAG	PO	U	3,189				£2.00
Moel Famau Country Park	NW	CP	LA	R	140,000	*	140,000	0.0%	
Monmouth Castle & Regimental Museum	SEW	HP	PO	U	4,096		4,637	-11.7%	
Monmouth Museum	SEW	MAG	LA	R	19,861		22,000	-9.7%	
Museum of Speed	SWW	MAG	LA	R	30,015		27,340	9.8%	
National Assembly Debating Chamber	SEW	HP	PO	U	83,767		91,014	-8.0%	
National Botanic Garden of Wales	SWW	CP	PO	R	109,761		150,389	-27.0%	£8.50
National Coracle Centre & Flour Mill	SWW	Ind	PO	R	3,884		4,102	-5.3%	£3.50
National Museum Wales	SEW	MAG	G	U	459,806		411,730	11.7%	
National Roman Legion Museum	SEW	MAG	G	R	73,130		69,057	5.9%	
National Showcaves Centre for Wales	SWW	CP	PO	R	70,980				£13.75
National Slate Museum	NW	MAG	G	R	135,741		148,532	-8.6%	
National Waterfront Museum	SWW	MAG	G	U	267,362		256,471	4.2%	
National Wool Museum	SWW	MAG	G	R	34,212		29,534	15.8%	
Neuadd Goffa Ceiriog	NW	MAG	PO	R	480	*			
Newport Museum & Art Gallery	SEW	MAG	LA	U	57,322		51,599	11.1%	
Newport Wetlands Enviromental, Educational & visitor Centre	SEW	CP	PO	R	90,914	*	92,425	-1.6%	
Newton House, Dinefwr Park & Castle	SWW	CP	NT	R	66,426		75,546	-12.1%	
Newtown Textile Museum	MW	MAG	LA	R	947		1,228	-22.9%	£1.00
Ocean Lab	SWW	WL	LA	C	85,824		116,342	-26.2%	
Old Bell Museum	MW	MAG	PO	R	2,357		2,435	-3.2%	£1.00
Old Cilgwyn Gardens	SWW	CP	PO	R	580		600	-3.3%	£2.00
Old Station	SEW	CP	LA	R	80,000	*	108,000	-25.9%	
Oriel Plas Glyn-Y-Weddw	NW	MAG	PO	U	180,548		121,870	48.1%	
Oriel Y Parc	SWW	MAG	PO	C	131,323		123,490	6.3%	
Oxwich Castle	SWW	HP	Cadw	C	6,196		8,352	-25.8%	
Parc Howard Museum and Art Gallery	SWW	MAG	LA	R	9,916		12,060	-17.8%	
Park Hall Countryside Experience	MW	WL	PO	R	65,000		69,000	-5.8%	£6.95

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
Parva Farm Vineyard	SEW	CP	PO	R	7,600	*	5,000	52.0%	
Pembrey Country Park	SWW	CP	LA	C	388,416	*	398,115	-2.4%	
Pembrokeshire Candle Centre & Museum	SWW	Ind	PO	R	9,500	*			
Pembrokeshire Sheepdogs	SWW	WL	PO	R	2,321		2,435	-4.7%	£5.00
Penrhyn Castle	NW	HP	NT	C	97,719		149,118	-34.5%	
Plantasia	SWW	CP	LA	U	82,697		72,740	13.7%	£3.95
Plas Mawr Elizabethan Town House	NW	HP	Cadw	C	22,877		25,049	-8.7%	
Plas Newydd	NW	HP	NT	R	96,294		101,677	-5.3%	
Plas-yn-Rhiw	NW	HP	NT	C	32		15,204	-99.8%	
Pontypridd Museum	SEW	MAG	LA	U	25,473	*	21,881	16.4%	
Porthcawl Museum	SEW	MAG	PO	C	1,063		892	19.2%	£0.50
Porthkerry Country Park	SEW	CP	LA	R	150,000	*	200,000	-25.0%	
Portmeirion	MW	MAG	PO	R	195,276		234,098	-16.6%	£10.00
Powis Castle & Garden	MW	HP	NT	R	111,438		116,464	-4.3%	
Powysland Museum & Montgomery Canal C'tr	MW	MAG	LA	R	5,532		5,481	0.9%	£1.00
Raglan Castle	SEW	HP	Cadw	R	53,530		62,141	-13.9%	
Red Kite Feeding Centre	MW	CP	PO	R	24,650	*			£4.50
Rheidol Hydro Electric Power Station	MW	Ind	PO	R	2,444		1,944	25.7%	
Rhossili Gallery	SWW	MAG	PO	U	2,795	*	5,000	-44.1%	
Rhuddlan Castle	NW	HP	Cadw	R	19,384		24,897	-22.1%	
Rhyl Miniature Railway	NW	R/T	PO	R	16,700		16,000	4.4%	
Robert Owen Memorial Museum	MW	MAG	PO	R	2,000	*	1,415	41.3%	
RSPB Lake Vyrnwy Nature Reserve	MW	CP	PO	R	17,609	*			
Rug Chapel	NW	HP	Cadw	R	3,318		3,628	-8.5%	
Ruthin Craft Centre Gallery	NW	MAG	LA	R	95,874				
Senedd-Dy Owain Glyndwr	MW	HP	LA	R	1,751		2,080	-15.8%	£2.50
Shared Earth Trust, Denmark Farm	MW	CP	PO	R	1,600	*	2,000	-20.0%	
Snowdon Mountain Railway	NW	R/T	PO	R	131,413		143,224	-8.2%	£25.00
South Stack Lighthouse	NW	Ind	PO	C	98,155	*			
St Davids Bishops Palace	SWW	HP	Cadw	R	25,044		26,027	-3.8%	
St Davids Cathedral	SWW	HP	PO	C	258,000	*	262,000	-1.5%	
St Fagans: National History Museum	SEW	MAG	G	U	615,855		610,074	0.9%	
Strata Florida Abbey	MW	HP	Cadw	R	5,442		5,795	-6.1%	
Swallow Falls	NW	CP	PO	R	92,687	*	102,581	-9.6%	£1.50

NAME	REGION	CATEGORY	OWNER	COASTAL/ RURAL/ URBAN	2012		2011	2012/2011	£ ADULT
Swansea Museum	SWW	MAG	LA	U	139,159		118,112	17.8%	
Swansea Museum - Floating Exhibits	SWW	MAG	LA	U	12,334		5,785	113.2%	
Tacla Taid Transport and Agriculture Museum	NW	Ind	PO	C	8,500	*			£3.50
Taliesin Arts Centre: Ceri Richards Gallery	SWW	MAG	PO	U	10,200	*			
Talyllyn Railway	MW	R/T	PO	R	41,920		46,934	-10.7%	£14.00
Techniquest	SEW	MAG	PO	U	148,561		167,849	-11.5%	£7.00
Teifi Valley Railway	MW	R/T	PO	R	8,486	*	9,742	-12.9%	£7.50
The Flying Boat Centre	SWW	MAG	PO	C	4,779		7,702	-38.0%	
The LC	SWW	Theme	PO	C	736,949		708,180	4.1%	
The Old Market Hall	MW	HP	PO	R	1,925		2,342	-17.8%	
The Regimental Museum of the Royal Welsh	MW	MAG	PO	R	15,802				£4.00
The Tramshed	SWW	MAG	LA	U	11,011		4,048	172.0%	
The Winding House	SEW	MAG	LA	U	9,792		10,563	-7.3%	
Tintern Abbey	SEW	HP	Cadw	R	67,582		69,631	-2.9%	
Tredegar House	SEW	HP	NT	R	41,956		21,234	97.6%	
Tretower Court & Castle	MW	HP	Cadw	R	14,939		16,234	-8.0%	
Tudor Merchant's House	SWW	HP	NT	C	25,888		23,711	9.2%	
Vale of Rheidol Railway	MW	R/T	PO	C	40,273		41,319	-2.5%	£15.00
Valle Crucis Abbey	NW	HP	Cadw	R	8,632		9,335	-7.5%	
Wales Millennium Centre	SEW	MAG	PO	U	1,144,628	*	1,046,958	9.3%	
Weobley Castle	SEW	HP	PO	R	2,501		4,381	-42.9%	
West Wales Museum of Childhood	SWW	MAG	PO	U	4,006				
White Castle	SEW	HP	Cadw	R	9,836		10,949	-10.2%	
Wrexham County Borough Museum	NW	MAG	LA	U	29,995		25,153	19.3%	
WWT National Wetland Centre Wales	SWW	WL	PO	R	49,219		47,824	2.9%	£8.45

Appendix

Survey letter and questionnaire

Dear Colleague,

VISITS TO TOURIST ATTRACTIONS 2012 SURVEY

This letter is to invite you to take part in the latest wave of the 2012 Visitor Attractions Survey. The results of this high profile survey are published annually and receive much interest for local and national tourism development purposes as well as serving as a useful benchmark tool for your own management information.

For your information the press release from last years' survey is on the page overleaf.

Please find enclosed a questionnaire (or several questionnaires if you have more than one attraction) requesting information on visitor numbers and other aspects of your operation during 2012.

It has been sent to you in the language requested in a previous year by a representative from your attraction. If you would prefer to receive the survey in Welsh or bilingually, or to complete the survey online, then please get in touch with either myself or Claire Peate at Beaufort Research (tel. 029 2037 8565 / claire@beaufortresearch.co.uk) who will be managing the project on our behalf.

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

EHastings

Ella Hastings
Senior Research Officer
Ella.hastings@wales.gsi.gov.uk

VISITS TO WELSH TOURIST ATTRACTIONS 2012

VISITORS

1 What were the visitor numbers to your attraction during the 2012 calendar year? ***Please exclude special events outside normal opening hours or any private hire.***

i. Total visits numbers in 2012 (paid and free) ☐☐☐☐☐☐☐ Is this number: exact? ☐ An estimate? ☐

ii. Visits numbers in 2012 for paid visits only ☐☐☐☐☐☐☐ Is this number: exact? ☐ An estimate? ☐

2 Please write in the paid and free visits for each month. ***If closed strike through month.***

January		July	
February		August	
March		September	
April		October	
May		November	
June		December	

3 What method/s are used for recording / estimating visitor numbers? ***Please tick all that apply.***

From ticket sales and/or group booking sales	☐	Estimate only on the basis of sample count	☐
Mechanical or electronic method of counting (e.g. turnstile)	☐	Estimate only	☐
Manual method of counting numbers	☐	Other (please specify) ____________________	☐

4 What percentage of visitors in 2012 (paid and free) were:

Adults ☐☐☐ %

Children ☐☐☐ %

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

5a Approximately how many school children visited your attraction as part of an organised group in 2012?

Number of school children ☐☐☐☐☐☐ Is this number: exact? ☐ An estimate? ☐

5b Approximately how many group bookings did you have in 2012? By group bookings we mean organised tours using coaches or minibuses

Number of group bookings ☐☐☐☐ Is this number: exact? ☐ An estimate? ☐

6 Did you charge for admission to the main attraction in 2012? Yes ☐ No ☐

7 (IF YES) What was the standard admission charge (in high season/ summer) per person for the main attraction in 2012 (including VAT)?

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

9 What percentage of visitors in 2012 were from:

Overseas ☐☐☐ %

Wales ☐☐☐ %

Rest of UK (excl. Wales) ☐☐☐ %

=100%

OPERATIONS

10 How did the attraction's gross revenue in 2012 compare with 2011?

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

Similar ☐

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

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

Admissions (A)	£ ☐☐•☐☐ p	
Donations (B)	£ ☐☐•☐☐ p	
Catering (C)	£ ☐☐•☐☐ p	Total overall average spend (A+B+C+D+E+ F) £ ☐☐•☐☐ p
Retail (D)	£ ☐☐•☐☐ p	
Car Park (E)	£ ☐☐•☐☐ p	
Other (F)	£ ☐☐•☐☐ p	

12 Did you make any kind of upgrade or improvements to your attraction in 2012 (excluding normal repairs and upkeep)? Yes ☐ No ☐

13 (IF YES) how much money was spent (including VAT)? £ ☐☐☐☐☐☐☐☐☐

14 Did you provide any visitor information and/or tours in the following languages in 2012? Welsh ☐ French ☐ German ☐

15 Do you intend to provide any visitor information and/or tours in the following languages in 2013? Welsh ☐ French ☐ German ☐

HUMAN RESOURCES

16 How many people were employed in any visitor-related activities in the attraction in 2012, including yourself, working owners, self-employed and/or any volunteers?

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

17 In 2012 did you have any difficulties recruiting and/or retaining staff?

Recruiting Yes ☐ No ☐ NA ☐ → Please give reason ____________

Retaining Yes ☐ No ☐ → Please give reason ____________

MARKETING

18 Compared with 2011, was expenditure on marketing activities in 2012: Up ☐ Down ☐ Similar ☐

Thank you. Please return in the freepost envelope, or if this has been mislaid please return to
Beaufort Research, FREEPOST, CF10 1YS

If you wish to complete the survey online please go to www.beaufortresearch.co.uk/visitwales/attractions.htm