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# Visits to Tourist Attractions in Wales 2021

## Report for Visit Wales

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

## Visits to Tourist Attractions in Wales in 2021

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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 SRI would like to thank all representatives and operators in the attractions sector that provided information for the survey on which this report is based. Without their assistance it would not be possible to collate these figures.

### **Estimates / visit figures unavailable**

Figures shown in this report are given in good faith on the basis of information provided by the proprietors of attractions. Please note it can be difficult to differentiate between different types of visitors at certain attractions.

If an attraction estimated their yearly visitor figure then the figure provided by them includes an asterisk (\*).

### **Admission**

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

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

### **Attraction categories**

Attractions have been classed by category for analysis purposes. The categories are shown in the table overleaf. Please note that attractions do not always fall neatly into one category. We have classed each attraction into the category in which they best fit.

## Abbreviations

CATEGORY	ACRONYM	EXPLANATION
Regions	M	Mid Wales
	N	North Wales
	SE	South East Wales
	SW	South West Wales
Ownership	AC-NMW	Amgueddfa Cymru National Museum Wales
	Cadw	Cadw
	DCWW	Dŵr Cymru Welsh Water
	LA/ NP	Local Authority / National Park
	NRW	Natural Resources Wales
	NT	National Trust
	PO	Privately owned (private individual owners, organisation / trust etc.)
Category	RSPB	The Royal Society for the Protection of Birds
	A / A	Adventure / activity attraction
	CP	County park, garden, other nature-based attractions
	Farm	Farm / rare breeds
	F / D	Food or drink attraction
	HP	Historic properties, castles, forts, historic houses, palaces, historic monuments, archaeological sites, other historic properties, heritage centres, places of worship
	IND	Industrial / craft attraction
	MAG	Museums and / or art galleries, arts centres
	R / T	Railway / tramway / travel / transport attraction / tours
	SC / T	Science / technology centre
	Theme	Leisure parks, theme parks
	WL	Wildlife or nature reserve
	OTH	Other attraction

## 1. **Headline findings**

### **Method**

- 1.1 Attractions were able to complete the survey online or by telephone. The survey began in March 2022 and closed in June 2022. 323 attractions completed the survey, out of 484 attractions that were invited to take part, whilst 5 others responded, but were unable to provide visitor figures (68% total response rate).
- 1.2 15 follow-up interviews were also conducted with attractions. The lines of enquiry in the depth interviews were similar to those in the quantitative questionnaire. The purpose of the interviews was to add contextual information to some of the themes emerging from the quantitative survey.

### **The proportion of attractions open did not reach 2019 pre-pandemic levels**

- 1.3 In April 2021, 36% of attractions were open, which is consistent with the Welsh Government's ease of restrictions towards the end of April. This increased again in May when 68% of attractions opened and Wales moved to COVID-19 alert level three at the beginning of May, and COVID-19 alert level two in mid-May, meaning more attractions were legally able to reopen.
- 1.4 The proportion of attractions open each month in 2021 was highest in August and September, when 83% were open. In comparison, the proportion of attractions open each month in 2019 was highest in July (98%), and for 2020, was highest in February (67%), before the pandemic.
- 1.5 The results vary by venue type. In August 2021, only 62% of purely indoor attractions were open, compared to 95% of outdoor attractions, and 93% of attractions which have both indoor and outdoor elements.

### **Average operating capacity increased**

- 1.6 Around half (48%) of attractions said their average operating capacity when open in 2021 was between 80% and full capacity. Only 16% were operating at this capacity in 2020.

### **17.4 million visits made to attractions which provided data in 2021**

- 1.7 64% of these visits were to free attractions, whilst 36% were to paid attractions.
- 1.8 Nearly half (45%) of these visits were to attractions in North Wales, whilst 27% were to attractions in South East Wales, 21% to attractions in South West Wales, and 7% to attractions in Mid Wales.
- 1.9 Country parks/gardens and wildlife/nature reserves continue to fare better than other attractions during the pandemic. In 2019, country parks/gardens and wildlife/nature reserves

accounted for 26% of visits, rising to 45% in 2020 and 46% in 2021. In comparison, museums/art galleries accounted for 26% of visits in 2019, falling to 15% in 2020 and even further to 6% in 2021.

### **Most attractions reported an increase in visitors in 2021**

- 1.10 85% said their visitor numbers increased, 3% said they stayed the same, and 12% said their visitor numbers decreased.
- 1.11 Purely indoor attractions fared worse than others. Only 71% of indoor attractions said their visitor numbers increased, compared to 90% of outdoor attractions, and 90% of attractions which have both indoor and outdoor elements.
- 1.12 The main reasons for an increase in visitors were related to COVID-19 restrictions, including being able to open during the peak summer season, fewer restrictions, and greater consumer confidence compared to 2020.
- 1.13 Although 85% said their visitor number increased in 2021, only 67% said their gross revenue increased. 22% said it was similar to the previous year, and 11% said it was down on the previous year.

### **Visitor figures were well below 2019 pre-pandemic levels**

- 1.14 Visits to attractions increased by 68% in 2021 from 2020, but visits were still 33% lower than visits in 2019.
- 1.15 Visitor numbers to indoor attractions were 78% lower than in 2019, whilst visitor numbers to underground attractions were 56% lower, and 34% lower for attractions classed as both indoor and outdoor. Visitor numbers to outdoor attractions bucked the trend, and were 3% higher than 2019.
- 1.16 Visitor numbers to museums/art galleries were 78% lower in 2021 than in 2019. In comparison, visits to wildlife/nature reserves were only 3% lower, whilst visits to country parks/gardens and adventure/activity attractions were only 2% lower.
- 1.17 When looking at results by ownership type, visits to attractions operated by National Museum Wales were 74% lower in 2021 than 2019. In comparison, visits to sites operated by Natural Resources Wales were 4% higher.

### **Admission charges rose in 2021**

- 1.18 Average admission charges rose by 6% for adults and 10% for children.
- 1.19 Qualitative comments suggest that attractions needed to recoup losses from 2020, and also factored in the increasing cost in running their attraction. Qualitative comments suggest that the average admission charge is likely to rise again in 2022.

### **Attractions had difficulty recruiting staff**

- 1.20 There was a 17% increase in staff amongst attractions in 2021 from 2020, however, this was still well below 2019 pre-pandemic levels.
- 1.21 Qualitative comments suggest that recruitment was a significant challenge in 2021. Even if attractions wanted to hire more staff, not all were able to fill the positions they were recruiting for. This has continued for some into 2022.

### **Top paid and free attractions in 2021**

- 1.22 The paid attraction receiving the highest number of visitors in 2021 was Cardiff Castle, followed by Folly Farm and Portmeirion.
- 1.23 The free attraction receiving the highest number of visitors in 2021 was Barry Island Pleasure Park. However, this attraction provided estimated figures and includes admittance to a number of the rides and attractions at the pleasure park. Tir Prince Fun Park and Pembrey Country Park received the second and third highest number of visitors.



## 2. Introduction

### Background

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

- (1) Determine and report visit numbers to attractions throughout Wales.
- (2) Analyse collected data on visit numbers to identify current trends.
- (3) Provide additional comparative analysis of data contained in the survey including visit figures, operations, revenue, marketing and human resources.
- (4) Analyse data according to attraction categories, the four economic regions of Wales, and admission charging policy (free vs. paid).

### Tourist attraction definition

2.2 The research uses the tourist attraction definition<sup>1</sup> agreed upon by the four National Tourist Boards for the 2001 survey whereby a tourist attraction is:

- (1) "...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."

### Objectives

2.3 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

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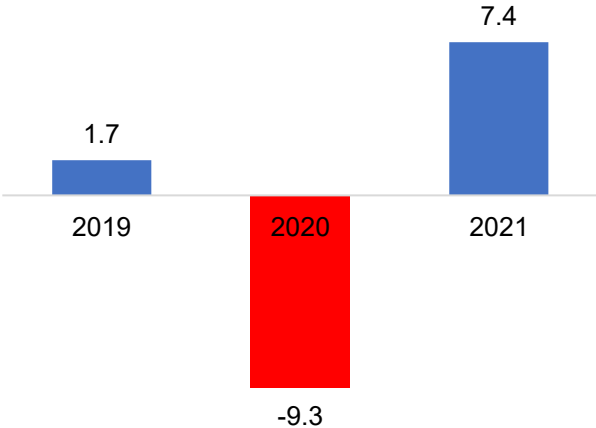
<sup>1</sup> This definition impacts on the Wales Millennium Centre, which could be categorised as 'a retail outlet or a venue for ... theatrical ... performances', which would exclude it from this research. The venue also does not neatly fall into the above classification as it is not strictly 'a single business, under a single management' but rather it comprises a theatre, building of architectural significance, cafés and art galleries. The visitor figures included in this report for the Wales Millennium Centre do not include theatre goers, or visitors whose main purpose of visit is associated with the theatre (e.g. ticket sales/collection etc.). For this reason, the Wales Millennium Centre is listed in the following pages, whilst recognising that it does not match the above definition of a tourist attraction in every respect. This must be considered when comparing with other entries.

organisations and to disseminate the findings in a useful and valuable way to the wider industry.

### UK economic summary for 2021

2.4 The UK economy grew 7.4% in 2021, which was the fastest annual growth rate since the Second World War. It was however recovering from the fallout of the COVID-19 pandemic when UK GDP plunged by 9.3% in 2020<sup>2</sup>.

Figure 2.1: UK Gross Domestic Product (%) 2019-2021



- 2.5 At the start of 2021, the UK was again in a national COVID-19 lockdown resulting in businesses having to close and household spending fell. The COVID-19 vaccination drive, which started on 8<sup>th</sup> December 2020, helped the UK economy recover rapidly in 2021. The more people vaccinated meant that restrictions to help control the spread of the virus could be lifted and more people could return to work<sup>3</sup>.
- 2.6 By November 2021, UK economic activity had returned to pre-pandemic levels, although the economy experienced a slight set back in December 2021 (GDP fell by 0.2%) as consumer spending reduced due to the Omicron variant of COVID-19<sup>4</sup>.
- 2.7 Key findings from the COVID-19 UK Tourism Consumer Tracker Survey<sup>5</sup>, conducted between 6 April 2021 and 9 May 2021, reported that around half (48%) believed the ‘worst had passed’ in relation to COVID-19, which was the highest it had been since the beginning of the pandemic. This rise in optimism matched a higher proportion of people being comfortable conducting more outdoor and indoor activities. For example, in early March 2021, levels of comfort in ‘visiting an indoor visitor attraction’ were at net +36, whilst comfort

<sup>2</sup> Office for National Statistics: [GDP: Year on Year Growth](#)  
<sup>3</sup> Bank of England: [Monetary Policy Report - May 2021](#)  
<sup>4</sup> Bank of England: [Monetary Policy Report - November 2021](#)  
<sup>5</sup> [COVID-19 UK Tourism Consumer Tracker Survey \(Wales profile\): April 6 to May 9 2021](#)

levels in 'going for a walk in a country park or local trail' were at net +87 (net is the proportion 'comfortable' minus proportion 'uncomfortable'). In early May 2021, levels of comfort increased to net +50 in 'visiting an indoor visitor attraction', and net +90 in 'going for a walk in a country park or local trail'. The UK vaccination drive also meant more over 45s, who had been vaccinated, were also confident in taking overnight trips.

## COVID-19 timeline for 2021

- 2.8 Wales began 2021 under strict lockdown measures. In late 2020, COVID-19 cases were on the rise and as a result, new measures were brought into force on 4<sup>th</sup> December 2020. Indoor entertainment and visitor attractions were ordered to close as part of these measures. As cases continued to escalate, outdoor attractions were also ordered to close from 14<sup>th</sup> December.
- 2.9 On 16<sup>th</sup> December, the First Minister announced that Wales would move to alert level 4 (the highest level of restrictions under its Coronavirus control plan) from Christmas day.
- 2.10 The timeline for the ease of COVID-19 restrictions in Wales is detailed in the table below<sup>6</sup>:

27 March 21	Wales lifted travel restrictions within its borders as 'stay local' rule ended.
24 April 21	Six people from six different households were allowed to meet up outdoors.
26 April 21	Outdoor attractions were allowed to reopen. Outdoor hospitality also reopened. Indoor hospitality remained closed except for takeaways.
3 May 21	Wales moved into COVID-19 alert level three. Gyms, leisure centres, swimming pools and community centres reopened. Two households were allowed to meet and have indoor contact.
17 May 21	Wales moved into COVID-19 alert level two. Indoor attractions and hospitality reopened, as well as underground attractions.
17 May 21	International travel resumed under a traffic light system.
7 June 21	Wales started a phased move to alert level one. Groups of up to 30 were able to meet outdoors and outdoor events could restart.
14 June 21	All adults in Wales were offered their first COVID-19 vaccination.
17 July 21	Wales moved entirely into COVID-19 alert level one. Up to six people could meet indoors in private homes or holiday accommodation. There were no limits on the number of people who could gather outdoors.

<sup>6</sup> Senedd Research – Welsh Parliament: [Coronavirus-timeline-the-response-in-Wales](#)

26 July 21	The number of fully vaccinated people in Wales passed two million.
7 August 21	Wales moved to COVID alert level zero, meaning the majority of Wales's COVID-19 restrictions were lifted, including the rule on the number of people who could meet indoors. All businesses were able to reopen. People who were fully vaccinated would no longer have to self-isolate if they came into contact with COVID-19. But the wearing of masks remained compulsory in most indoor public places in Wales.
29 October 21	Wales remained at alert level zero however the self-isolation guidance changed – all those vaccinated were asked to self-isolate if they had come into contact with COVID-19, until they had received a negative PCR test.
30 November 21	All travellers arriving from abroad had to take a PCR test following the discovery of two cases of the Omicron COVID variant in the UK.
3 December 21	The first case of Omicron variant of COVID-19 was identified in Wales.
7 December 21	The First Minister confirmed that all adults over the age of 18 in Wales would be offered their booster vaccine by the end of 2021.
26 December 21	Wales moved into COVID-19 alert level two, where restrictions on the number of people at social gatherings and two-meter social distancing returned.

- 2.11 Overall, outdoor attractions were allowed to open for approximately 36 weeks of the year, whilst indoor and underground attractions were allowed to be open for approximately 33 weeks.
- 2.12 As a comparison, in 2020 outdoor attractions were allowed to open for approximately 31 weeks of the year, whilst indoor attractions were allowed to be open for approximately 29 weeks, and underground attractions for approximately 27 weeks.

### **UK visitor figures for 2021**

- 2.13 There were 6.2 million inbound visits to the UK in 2021<sup>7</sup>. These figures are based on the results of the International Passenger Survey (IPS), but the running of the survey was impacted because of the COVID-19 pandemic. The IPS restarted in 2021 but no data was collected for those travelling to the UK by Eurotunnel, and for those travelling via Dover, data was only collected from quarter 3 onwards.

<sup>7</sup> UK inbound visit figures: [Visit Britain 2021 inbound data](#)

- 2.14 However, air data has a complete dataset for 2021, which allows us to make comparisons between 2021 and 2019. There were 4.8 million inbound visits by air to the UK in 2021 - down 85% compared to 2019<sup>8</sup>.
- 2.15 Of the 6.2 million visits to the UK in 2021, 116,000 were to Wales<sup>9</sup>. This compares to 1.02 million visits to Wales in 2019<sup>10</sup>, although as noted above, there are limitations when comparing data from 2021 to data collected pre-pandemic.

### **Climatic summary for 2021<sup>11</sup>**

- 2.16 2021 was slightly warmer than average for the UK. Rainfall in 2021 was close to average for much of the UK.
- 2.17 April was the sunniest on record, which timed nicely when the COVID-19 restrictions eased for six people to meet outdoors, and also outdoor attractions reopened the last week of April.
- 2.18 May however was the wettest ever for Wales, and the fourth wettest for the UK as a whole. Indoor attractions and indoor hospitality reopened in May in time for this rainfall.
- 2.19 There was a heatwave in July, which resulted in the Met Office's first ever Amber extreme heat warning for the UK. There was a hot spell between 13<sup>th</sup> and 26<sup>th</sup> July and temperatures rose above 30°C for six consecutive days. Storm Evert hit the UK in July, bringing heavy rain and very strong winds, which was not typical for that time of year.
- 2.20 Autumn 2021 was the third warmest for the UK. October was notably wetter than average and in November, the UK was hit by one of the most powerful and destructive storms seen in recent years (Storm Arwen), for which the Met Office issued a red weather warning.

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<sup>8</sup> Quarterly Inbound Update & Full Year 2021: [International Passenger Survey by the ONS](#)

<sup>9</sup> Regional Quarterly Inbound Update & Full Year 2021: [International Passenger Survey by the ONS](#)

<sup>10</sup> Inbound trends by UK nation, region & county: [International Passenger Survey by the ONS](#)

<sup>11</sup> Met Office – Climate and weather: [2021-a-year-in-weather-a-review](#)

### **3. Methodology**

#### **Conducting the research**

- 3.1 Fieldwork for the survey began in March 2022 and closed in June 2022.
- 3.2 The database of attractions was updated before fieldwork began. This included the removal of businesses which did not meet the definition of a tourist attraction, as outlined in 2.2, and a search for new attractions.
- 3.3 A link to the survey was sent by email to attractions on 21<sup>st</sup> March 2022. A reminder email was sent two weeks later, on the 4<sup>th</sup> April 2022. This was followed by telephone follow-ups for those who did not respond to the first two emails. A final reminder email was sent on 16<sup>th</sup> May 2022, and the survey closed on 6<sup>th</sup> June 2022.
- 3.4 Organisations with a large number of attractions were invited to complete a spreadsheet rather than an online survey for each of their sites. These organisations included National Museum Wales, Cadw, Dŵr Cymru Welsh Water, National Trust and Natural Resources Wales.
- 3.5 The questionnaire was based on the questionnaire used in previous years to ensure comparability. The survey and all survey materials were available in English and Welsh.

#### **Follow-up interviews**

- 3.6 15 follow-up interviews were also conducted with attractions in May and June 2022. The lines of enquiry in the depth interviews were similar to those in the quantitative questionnaire. The purpose of the interviews was to add contextual information to some of the themes emerging from the quantitative survey.
- 3.7 We sought interviews with a range of attractions, including attractions from different categories, regions, and venue types.

#### **Response rate**

- 3.8 A total of 484 attractions believed to fit the tourist definition were invited to take part. The response rate for this year and earlier years are given in Figure 3.1 overleaf.
- 3.9 The total response rate to the survey was 68% – higher than in previous years. This is a result of efforts to increase the response rate in previous years.

Figure 3.1: Response rate

Response rates	2021	2020	2019	2018	2017	2016**
Total attractions contacted	484	569	569	570	571	609
Attractions completing the survey	323* 67%	260* 46%	299 53%	248 44%	237 42%	216 35%
Attractions responded but unable to provide figures**	5 1%	73 13%	34 6%	20 4%	1 0.2%	N/A
<b>TOTAL RESPONSE RATE</b>	<b>328 68%</b>	<b>333 59%</b>	<b>333 59%</b>	<b>268 47%</b>	<b>238 42%</b>	<b>216 35%</b>

\* Attractions which were closed because of the pandemic have been included in the proportion completing the surveys in 2021 and 2020, as they provided partial data despite not being open for visitors

\*\* Prior to the 2019/2020 survey, this row included attractions which responded to say that they were closed

### Recording method for visitor numbers

3.10 In order to assess the reliability of visitor figures provided by attractions, attractions were asked how they work out their visitor figures. The results are shown in Figure 3.2 below.

3.11 The figures amount to more than 100% as multiple methods are mentioned by some attractions. 'Other' methods for recording visitor numbers mostly include car counts.

Figure 3.2: Recording method for visitor numbers

Recording method	No.	%
From ticket sales and/or group booking sales	132	47%
Mechanical or electronic method of counting (e.g. turnstile)	78	28%
Manual method of counting numbers	51	18%
Estimate only	42	15%
Estimate only on the basis of sample count	10	4%
Other	6	2%

Base: Attractions providing data (278)

3.12 The above results are similar to the recording methods for 2020 and 2019. Results have differed slightly since 2018, with an increase in the proportion of attractions providing 'estimate only' figures (9% in 2018). Since 2019 there has been an effort to boost response rates. The increase in the proportion of attractions completing the survey since 2018, particularly smaller attractions, has likely increased the proportion providing estimates.

3.13 Although the proportion of attractions basing their visitor figures on 'estimates only' has increased slightly since 2018, these attractions only make up a small proportion of the sample, and the remaining attractions calculated their visitor figures based on more accurate recording methods.

## Notes on the report

- 3.14 This report focuses on visitor figures for 2021. However, comparisons have been made with data from previous years where it was felt beneficial to do so.
- 3.15 Where possible, comparisons have focused on data from attractions which completed the current survey, and previous surveys, so that like for like comparisons can be made. If this was not possible, then we have stated that the comparison reflects different samples.
- 3.16 Like for like comparisons have focused on year-on-year percentage changes, rather than presenting absolute figures. This is to avoid confusion by providing two sets of figures: figures used to provide total figures for 2021, and figures used for like for like comparisons. These figures would be different due to different sample sizes.
- 3.17 The base (sample size) can fluctuate throughout the report. For example, the data shown may indicate results from all attractions that completed this year's survey, or data from attractions that completed this year's survey and previous surveys. Another reason may be that some attractions were not able to answer all parts of the survey.
- 3.18 Throughout the report, samples of ten or below are highlighted in red and shown in italics to denote the need for caution to be applied when interpreting the results. The data has been analysed by region, ownership, category, and by other variables if results have been worthy of additional analysis, and if the sample size allows.
- 3.19 The figures in this report represent attractions which completed the survey, and not all attractions across Wales. However, the vast majority of major attractions in Wales completed the survey, and a high response rate was achieved. Therefore, the survey should provide an accurate indication of trends in the sector.
- 3.20 Where we refer to qualitative findings, this refers to the findings from the follow-up depth interviews, and open comments provided in the quantitative survey.



#### 4. Proportion of attractions open in 2021

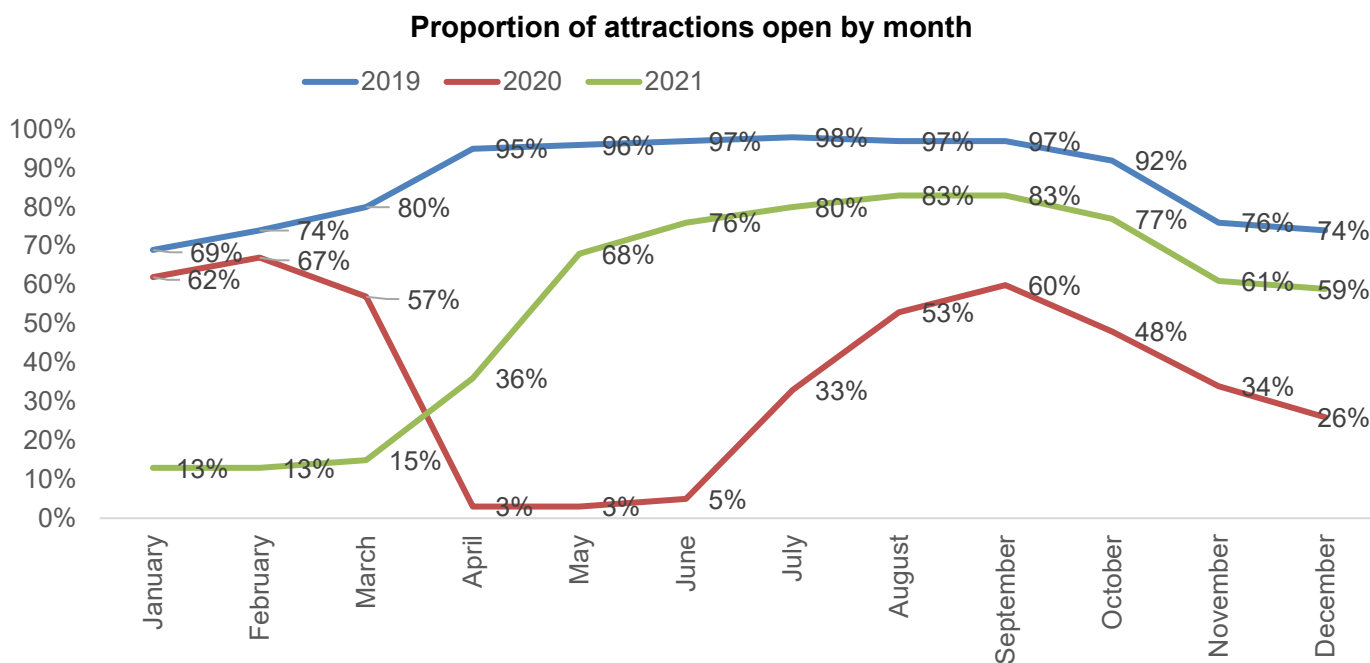
- 4.1 Relatively few attractions were open in January, February and March 2021, which coincides with the COVID-19 alert level four, with people required to 'stay at home'.
- 4.2 Only 13% of attractions were open in January and February and 15% in March. Some outdoor attractions, including outdoor spaces of heritage properties, country parks, and nature reserves were allowed to remain open and be used for exercise, which explains why a small percentage stayed open.
- 4.3 In April, 36% of attractions were open, which is consistent with the Welsh Government's ease of restrictions towards the end of April. This increased again in May when 68% of attractions opened and Wales moved to COVID-19 alert level three at the beginning of May, and COVID-19 alert level two in mid-May, meaning more attractions were legally able to reopen.
- 4.4 The proportion of attractions that were open increased to 83% in August – the highest percentage since the restrictions were lifted. Social distancing laws were lifted in August.
- 4.5 Once attractions were allowed to reopen in April and May 2021, the rest of the year saw more attractions open. Although the proportion of attractions open did not quite reach the 2019 pre-pandemic levels, it was significantly better than 2020.
- 4.6 The proportion of attractions closed all year due to COVID-19 was similar between 2020 and 2021. 15% of attractions were closed all year in 2020 compared to 14% in 2021. Please note that attractions that were closed have only been included in the survey since 2020, to reflect that some attractions may be closed due to the COVID-19 pandemic.
- 4.7 The reasons given by attractions for being closed in 2021 include:
- Choosing not to re-open due to the small size of the attraction, and therefore unable to operate safely and within social distancing regulations.
  - Choosing not to re-open until footfall is likely to improve significantly, as the attraction is unviable with significantly reduced footfall.
  - Not enough volunteers to be able to re-open the attraction, or volunteers unwilling to return until the COVID-19 situation improves.
  - The attraction is undergoing renovation.
- 4.8 Some of the attractions closed to factors related to COVID-19 mentioned that they have or plan to re-open in 2022.

*"We were unable to open due to the size of the attraction (it is very small) so unable to put in adequate social distancing. Also the attraction can only be opened with the use of volunteers - many of which are retired with health vulnerabilities"*

Indoor attraction

*“We’ve been closed now for around two years. We are hoping to reopen in July, but on a limited basis as we’re a small attraction. So, to begin with it will just be two days a week. We are run by volunteers, so we’re looking to just get it back up and running first, and then we can look at opening on additional days”*  
 Indoor attraction

Figure 4.1



Base: attractions providing data for 2019 (299), 2020 (260) and 2021 (323)

*Please note that attractions that are closed have only been included in the survey since 2020, to reflect that some attractions may be closed due to the COVID-19 pandemic*

4.9 Figure 4.2 shows the proportion of attractions that were open each month in 2021 by venue type (indoor, outdoor, both indoor and outdoor, or underground).

4.10 During January, February and March, there were no indoor attractions open as they were legally not allowed to. Around 45% of outdoor attractions chose to remain open during the first three months of the year. As stated before, outdoor attractions were allowed to remain open for exercise only during the national lockdown. A significant number of these were outdoor nature reserves.

4.11 The vast majority of outdoor attractions opened between May and October 2021 – the highest in June, August and September at around 95%. A significantly smaller proportion of indoor attractions were open in comparison – 51% in June, 59% in July, 62% in August and 66% in September.

Figure 4.2: Venue types open by month in 2021

Month	Indoor	Outdoor	Both - indoor and outdoor	Underground
January	0%	44%	7%	0%
February	0%	44%	7%	0%
March	0%	45%	11%	0%
April	5%	68%	43%	0%
May	42%	91%	75%	100%
June	51%	95%	84%	100%
July	59%	94%	90%	100%
August	62%	95%	93%	100%
September	66%	95%	91%	100%
October	63%	88%	82%	100%
November	51%	73%	64%	25%
December	48%	69%	63%	50%
Closed all year	30%	4%	6%	0%

Base: Attractions providing data for 2021: indoor (112), outdoor (78), both (129), underground (4)

*Caution: Small sample sizes for underground attractions*

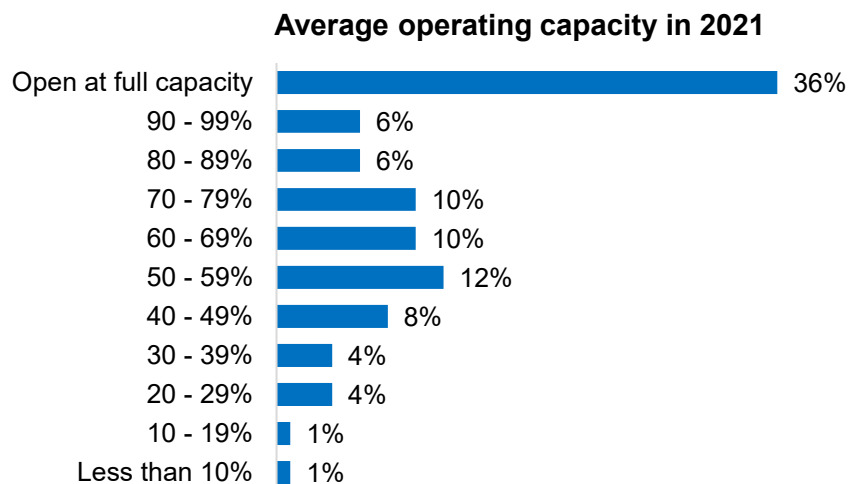
- 4.12 One factor which has not been captured, is the qualitative feedback from a few attractions who said that although they re-opened when they were allowed to, they did not initially fully re-open. They initially chose to only re-open on certain days. However, we do not know the proportion of attractions which chose to partially re-open, as this was not specifically asked in the survey.
- 4.13 Looking ahead to 2022, qualitative comments suggest that a few attractions are considering closing early in 2022, due to the increasing cost in operating. This is particularly true for attractions which are most likely to be affected by rising energy costs.

*“Demand isn’t great in the Winter anyway, but pre-pandemic we would weather it because we did so well in the summer months. I think we will likely close a bit earlier this year due to the cost of fuel”*  
Both indoor and outdoor attraction

## Operating capacity during 2021

- 4.14 Attractions that were open were asked at what percentage of their normal capacity level they were operating at, on average, when open during 2021. Figure 4.3 shows that over a third (36%) were open at full capacity.
- 4.15 The results to this question differ by venue type. The proportion of outdoor attractions that were operating at full capacity in 2021 was 61%, compared to only 17% of indoor attractions, and 34% for both indoor and outdoor attractions. None of the four underground attractions were operating at full capacity.

Figure 4.3



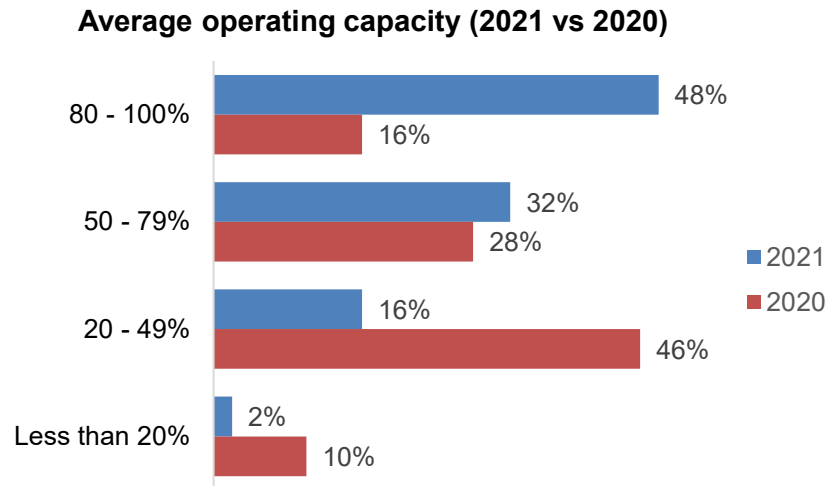
Base: attractions providing data (278)

- 4.16 Figures 4.4 and 4.5 show a comparison of average operating capacity for 2021 and 2020. However, a degree of caution needs to be applied when analysing these results as the sample between each year is different. Nevertheless, the chart likely demonstrates some of the changing trends between 2021 and 2020.

Figure 4.4



Figure 4.5



Base: attractions providing data 2021 (278) and 2020 (154)

4.17 Qualitative comments from attractions suggest that many chose to operate at full capacity when they were legally able to do so. However, a few chose to operate at reduced capacity levels to ensure their visitors could feel as safe as possible. As noted later in the report at point 7.14, some indoor attractions were of the opinion that they suffered more than outdoor attractions in 2021, as they felt that some visitors were still wary of visiting indoor attractions.

*“We found out through our own research that visitors to the site were wary of the site being too busy. So we decided to carry on with reduced capacity even if we could legally have had more visitors”*

Indoor attraction

## 5. Top ten free and paid attractions

### Top ten paid attractions 2021

- 5.1 The paid attraction reporting the highest number of visitors in 2021 was Cardiff Castle (372,606 visitors). Cardiff Castle has been in the top three paid attractions for the last four years.
- 5.2 Folly Farm with 348,689 visitors in 2021 was second place, and has also been in the top three paid attractions for the last four years. Portmeirion was ranked third place with 285,191 visitors in 2021, having been fourth place in 2020 and sixth place in 2019.
- 5.3 Seven out of the ten top paid attractions for 2021 were also in the top 10 paid attractions for 2020. Zip World Slate Caverns (eighth) and Conwy Castle (ninth) enter the top 10 having ranked 12<sup>th</sup> and 15<sup>th</sup> respectively in 2020. Nova (sixth) also entered the top 10 paid attractions.
- 5.4 Of the top ten paid attractions, Portmeirion and Nova were the only two attractions to achieve an increase in visitor numbers in 2021 when compared to pre-pandemic levels in 2019. The other top 10 attractions have not yet managed to regain their pre-pandemic visitor numbers.
- 5.5 The top ten paid attractions for 2021 received approximately 2.4 million visitors. This accounts for 38% of all visits made to the paid attractions which is almost back to pre-pandemic levels in 2019 when it accounted for 33%. In 2020, the top 10 paid attractions accounted for 51% of all visits made to paid attractions.

Figure 5.1: Top ten paid attractions for 2019, 2020 and 2021

	Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	No. of visits 2021	£ Adult	£ Child
1	Cardiff Castle	SE	LA/NP	HP	502,224*	195,930	372,606	£14.50	£10.00
2	Folly Farm	SW	PO	Farm	438,234	203,073	348,689	£19.95	£17.95
3	Portmeirion	N	PO	HP	245,690	128,596	285,191	£15.00	£9.00
4	LC Swansea	SW	PO	Theme	678,714*	185,312*	285,047*	£8.00	£6.00
5	Bodnant Garden	N	NT	CP	271,339	106,728	239,790	£14.00	£7.00
6	Nova	N	LA/NP	Theme	150,000*	-	200,000*	† <sup>12</sup>	£4.90
7	Zip World Forest	N	PO	A/A	223,500	121,035	180,225	£25.00	£25.00
8	Zip World Slate Caverns	N	PO	A/A	179,000	46,000	160,255	£25.00	£20.00
9	Conwy Castle	N	Cadw	HP	212,364	35,553	152,281	£9.90	£6.90
10	Zip World Penrhyn Quarry	N	PO	A/A	145,000	80,600	142,889	£99.00	£99.00

Visitor figures denoted with an asterisk (\*) represent estimated visitor figures.

<sup>12</sup> Free for adults but an admission charge for children

## Top ten free attractions 2021

- 5.6 Of the free admittance attractions providing data for 2021, Barry Island Pleasure Park received the highest number of visitors with 1,250,000 visitors. However, these are estimated figures and include admittance to a number of the rides and attractions at the pleasure park.
- 5.7 Barry Island Pleasure Park was a new entry to the survey in 2021 having not participated in past surveys. This is also the case for Wepre Country Park and Margam Country Park.
- 5.8 Pembrey Country Park was the third most visited free attraction in 2021 (804,513), up by 50% from 2020 and up by 24% from 2019. Pembrey Country Park has exceeded pre-pandemic visitor numbers. Similarly, Newborough Nature Reserve and Stackpole Nature Reserve had higher visitor numbers in 2021 than in 2019.
- 5.9 There is no surprise that outdoor attractions dominate the top 10 free attractions in 2021 as restrictions on outdoor attractions eased before indoor attractions. Qualitative comments suggest that many attractions believed visitors were still wary about visiting indoor attractions for a while after the restrictions lifted.
- 5.10 The Wales Millennium Centre was the top free attraction with the highest visitor numbers in 2019, 2018 and 2017. In 2021, Wales Millennium Centre was ranked 32<sup>nd</sup> for visitor numbers, which is down 55% compared to 2020 and down 92% compared to 2019. This fall in visitors was attributed to factors related to COVID-19 restrictions, ongoing redevelopment of the physical space at the site, and fewer third party operators open at the site.
- 5.11 National Museum Cardiff has also fallen out of the top 10 free attractions, having been the eighth most visited free attraction in 2020, and the seventh in 2019 and 2018.
- 5.12 The top ten free attractions for 2021 received approximately 6 million visitors. This accounts for 53% of all visits made to free attractions. This is back to levels seen in 2019 (50%).

Figure 5.2: Top ten free attractions for 2019, 2020 and 2021

	Name	Region	Owner	Category	No. of visits 2019	No. of visits 2020	No. of visits 2021
1	Barry Island Pleasure Park	SE	PO	Theme	-	-	1,250,000*
2	Tir Prince Fun Park	N	PO	Theme	1,000,000*	-	1,000,000*
3	Pembrey Country Park	SW	LA/NP	CP	611,114	405,444	804,513
4	Newborough Nature Reserve	N	NRW	WL	485,533*	342,676*	559,939*
5	Walkers on Snowdon	N	LA/NP	WL	587,864	329,271	544,489
6	Gwydir Forest Park	N	NRW	WL	371,655*	280,383*	408,511*
7	Wepre Country Park	N	LA/NP	CP	-	-	400,000*
8	Stackpole Nature Reserve	SW	NT	WL	256,746*	129,753*	390,498*
9	Margam Country Park	SW	PO	CP	-	-	305,678
10	Pontcysyllte Aqueduct	N	PO	HP	410,041*	275,336*	285,411*

Visitor figures denoted with an asterisk (\*) represent estimated visitor figures.

## 6. Visits in 2021

### Overall visits for 2021

- 6.1 Approximately 17.4 million visits were made to attractions which provided data in 2021.
- 6.2 The top 25 attractions accounted for over half of all visits recorded (55% of visits, and 9,610,377 visits overall).

### Overall visits by admission type

- 6.3 Two-thirds (64%) of visits were to free attractions, whilst just over a third (36%) of visits were to paid attractions. This is significantly different to the proportion of free and paid attractions completing the survey (46% and 54% respectively).

Figure 6.1: Overall visits by admission type

Admission type	Base	% of attractions	No. of visits	% of visits
Free	128	46%	11,177,283	64%
Paid	150	54%	6,251,012	36%
Total	278	100%	17,428,295	100%

Base: attractions that provided data (278)

Figure 6.2

About **two-thirds (64%)** of visits were to **free** attractions



Whilst just over **a third (36%)** were to **paid** attractions

### Overall visits by region

- 6.4 Participating attractions in North Wales received the highest share of visits (45%). This is higher than the proportion of attractions completing the survey from North Wales (33%).
- 6.5 The proportion of visits to attractions in South East Wales is the same as the proportion of attractions completing the survey from South East Wales (27%). Similarly, the proportion of visits to attractions in South West Wales is similar to the proportion completing the survey from South West Wales (22%).
- 6.6 The proportion of visits to attractions in Mid Wales (7%) is considerably lower than the proportion completing the survey from Mid Wales (18%).

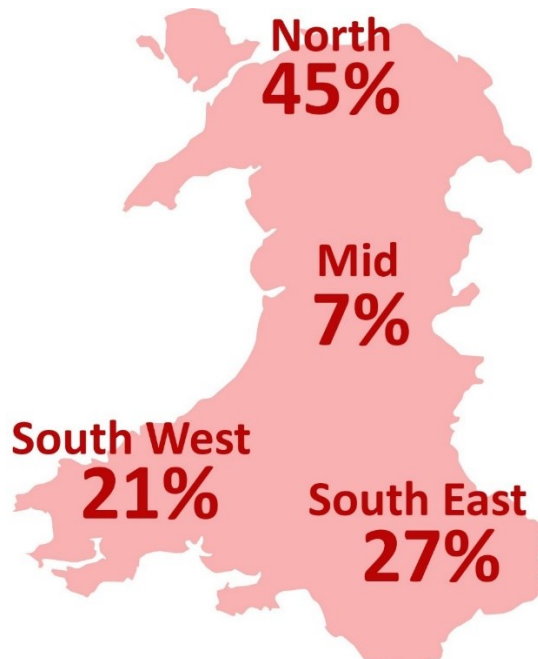


Figure 6.3: Overall visits by region

Region	Base	% of attractions	No. of visits	% of visits
Mid	51	18%	1,147,439	7%
North	91	33%	7,910,613	45%
South East	76	27%	4,782,132	27%
South West	60	22%	3,588,111	21%
Total	278	100%	17,428,295	100%

Base: attractions that provided data (278)

Figure 6.4: Percentage of visits by region



### Overall visits by attraction category

- 6.7 The most visited type of attraction was wildlife or nature reserves, which accounted for 28% of visits to attractions in 2021. This is higher than the proportion of wildlife or nature reserves completing the survey (19%).
- 6.8 The second most visited type of attraction was country parks/ gardens, which accounted for 18% of visits. Again, this is higher than the proportion of country parks/gardens that completed the survey (9%).
- 6.9 Museums/art galleries performed particularly poorly in 2021. These attractions accounted for 23% of attractions completing the survey, but only 6% of visits were to these types of attractions in 2021.

- 6.10 The performance of these three attraction types have changed drastically during the COVID-19 pandemic. In 2019, country parks/gardens and wildlife/nature reserves accounted for 26% of visits, rising to 45% in 2020 and 46% in 2021. In comparison, museums/art galleries accounted for 26% of visits in 2019, falling to 15% in 2020 and even further to 6% in 2021.
- 6.11 The performance of different types of attraction categories are explored in more detail in section 7 (comparative analysis of visits to tourist attractions).

Figure 6.5: Overall visits by attraction category

Attraction category	Base	% of attractions	No. of visits	% of visits
Adventure/ activity attraction	14	5%	1,272,446	7%
Country park/ garden	25	9%	3,083,148	18%
Farm/ rare breeds	12	4%	591,304	3%
Food or drink attraction	9	3%	50,638	0%
Historic property	58	21%	2,780,792	16%
Industrial/ craft attraction	14	5%	126,688	1%
Museum/ art gallery	65	23%	1,119,802	6%
Railway/ travel	18	6%	747,062	4%
Science/ technology centre	4	1%	102,018	1%
Theme park/ leisure	4	1%	2,735,047	16%
Wildlife or nature reserve	52	19%	4,798,653	28%
Other attraction	3	1%	20,697	0%
Total	278	100%	17,428,295	100%

Base: attractions that provided data (278)

*Caution: Small sample sizes*

## Overall visits by venue type

6.12 Data for indoor and outdoor attractions shows the visitor trend for 2021. Indoor attractions accounted for 28% of attractions completing the survey, but only 7% of visits to all attractions. In comparison, outdoor attractions accounted for 27% of attractions completing the survey, but 45% of visits to all attractions.

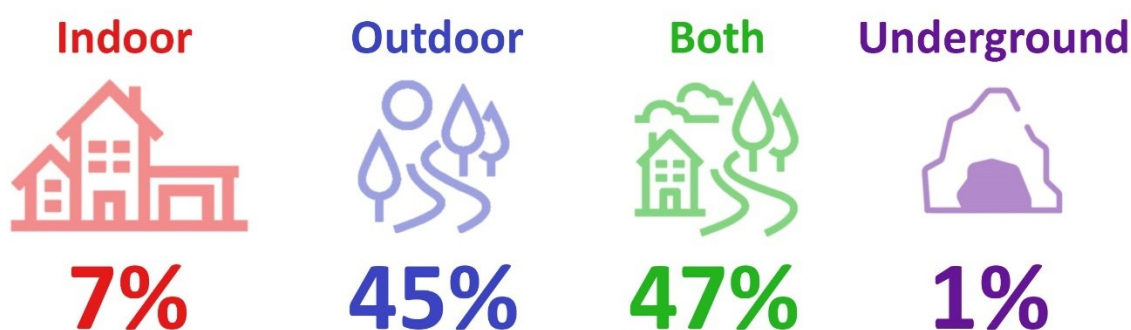
Figure 6.6: Overall visits by venue type

Attraction category	Base	% of attractions	No. of visits	% of visits
Indoor	78	28%	1,291,749	7%
Outdoor	75	27%	7,770,490	45%
Both - indoor and outdoor	121	44%	8,243,260	47%
Underground	4	1%	122,796	1%
Total	278	100%	17,428,295	100%

Base: attractions that provided data (278)

*Caution: Small sample size*

Figure 6.7: Percentage of visits by venue type



## Overall visits by ownership

6.13 Privately owned attractions received the highest share of visits (42%). However, this is lower than the proportion of private owned attractions completing the survey (56%).

6.14 Attractions owned by local authorities or national parks received a higher proportion of visits compared to the proportion completing the survey. These attractions accounted for 21% of visits but only 15% of attractions completing the survey.

6.15 The same is true for visits to Natural Resources Wales sites. These accounted for 16% of all visits, but only 10% of attractions completing the survey.

6.16 The proportion of visits for the remaining ownership types were relatively similar to their proportion in the sample completing the survey.

Figure 6.8: Overall visits by ownership

Region	Base	% of attractions	Number of visits	% of visits
Cadw	19	7%	784,772	5%
Local Authority / National Park	43	15%	3,729,868	21%
National Museum Wales	7	3%	516,654	3%
The National Trust	16	6%	1,386,777	8%
Natural Resources Wales	27	10%	2,865,304	16%
Private owner / trust	157	56%	7,374,857	42%
RSPB	5	2%	194,657	1%
Dŵr Cymru Welsh Water	4	1%	575,406	3%
Total	278	100%	17,428,295	100%

Base: attractions that provided data (278)

*Caution: Small sample sizes*

### Increase/ decrease in visitor numbers

6.17 Unsurprisingly, most (85%) attractions reported an increase in visitors for 2021 compared to 2020. However, indoor attractions did not perform as well as other attraction types. Only 71% of indoor attractions reported an increase in visits, whilst 26% said they saw a decrease. In comparison, 90% of outdoor attractions reported an increase in visitors, whilst only 6% reported a decrease.

Figure 6.9: Increase/ decrease in visitor numbers – 2021 vs 2020

Visit number changes 2021vs 2020	Indoor	Outdoor	Both - indoor and outdoor	Underground	All
Increased	71%	90%	90%	100%	85%
Stayed the same	3%	4%	3%	0%	3%
Decreased	26%	6%	8%	0%	12%

Base: attractions that provided data, excluding those who said 'don't know' (indoor 73, outdoor 72, both 116, underground 4)

*Caution: Small sample size for underground attractions*

## Factors for the increase in visitors in 2021

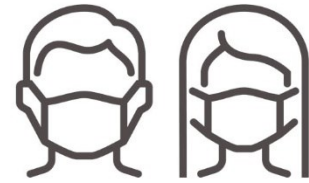
6.18 According to attractions that provided reasons for increased visitor numbers, the main factors were related to COVID-19 restrictions. These are noted below in the images and quotes.



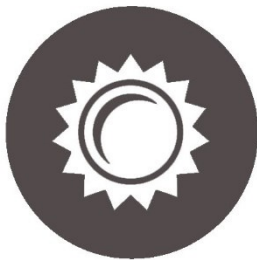
**Being able to open for more weeks in the year**



**Restricted travel abroad resulting in more 'staycations'**



**Fewer Restrictions**



**Being open during peak summer season**



**Greater consumer confidence compared to 2020**



**Pent up demand resulting from repeated on and off lockdowns up to early 2021**

*"There were longer closure periods in 2020 due to COVID and the number of restrictions and booking systems in place whenever open during 2020"*

Indoor attraction

*"In 2020 we were only open for August and September, but in 2021 we were open from April onwards. And the months we were open were much busier than some of the pre-pandemic years"*

Both indoor and outdoor attraction

*"Staycations boosted visitors. Overseas travel restrictions due to COVID-19, so people travelled within UK"*

Outdoor attraction

*"People were desperate to get out. We had our busiest ever summer in 2021"*

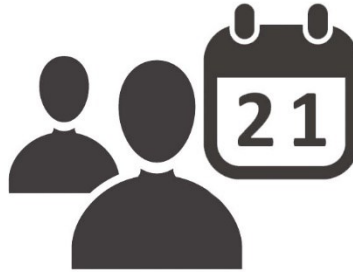
Outdoor attraction

## Factors for the decrease in visitors in 2021

6.19 The factors given for a decrease in visitors were sometimes specific reasons to each attraction. However, some of the more common themes are noted below in the images and quotes.



**Other elements of attraction staying closed, such as a cafe, resulting in less 'draw' for visitors**



**Opening later in the year than usual due to a lack of volunteers**



**Opening later in the year once social distancing laws were lifted (August 2021)**

*"The museum cafe closed due to the COVID-19 pandemic. This has reduced overall footfall, although the museum was open for more months in 2021 (6 compared to 4)"*  
Indoor attraction

*"We opened later than we were allowed as we have an older volunteer base who weren't comfortable to return just yet"*  
Both indoor and outdoor attraction

*"It was not economically viable for us to open with social distancing. We wouldn't have been able to break even"*  
Indoor attraction

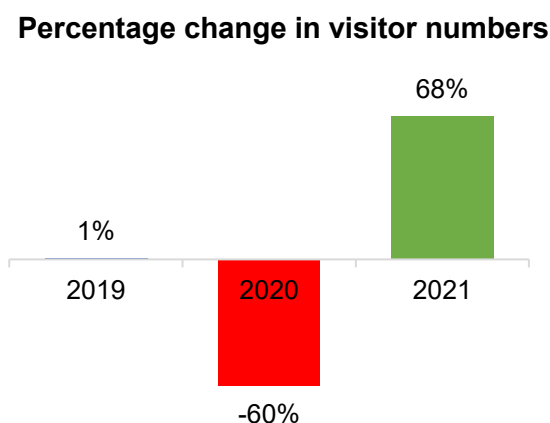
## 7. Comparative analysis of visits to tourist attractions

- 7.1 This section of the report looks at trends in the number of visits to attractions, comparing 2021 figures with figures from 2020 and 2019. In some cases, comparisons have been made with 2018 also.
- 7.2 Please note that this section only relates to attractions that provided data for previous years, in order to make like for like comparisons. We have therefore focused on percentage changes to visitor numbers, rather than the total number of visitors. This is to avoid providing two sets of visitor figures in this report.

### Overall comparisons in visitor figures

- 7.3 Figure 7.1 below shows the percentage change in visitors from 2019 to 2021, using data from attractions that completed the 2018, 2019, 2020 and 2021 surveys.
- 7.4 There was little difference in the number of visitors to attractions between 2018 and 2019 (1% increase in 2019). The COVID-19 pandemic resulted in visitor numbers falling by 60% in 2020. There has been a considerable increase in 2021, with visitor numbers increasing by 68%. However, visitor numbers in 2021 were still below 2019 levels. Visitor numbers in 2021 were 33% lower than figures from 2019.
- 7.5 Attractions which were closed in 2020 or 2021 due to the COVID-19 pandemic have been classed as having zero visitors. This is to help understand the effect of the COVID-19 pandemic on attractions. Of the 150 attractions included in the comparison below, 17 were closed in 2021, and 15 were closed in 2020.

Figure 7.1



Base: attractions providing data for 2018, 2019, 2020 and 2021 (150)

7.6 Qualitative comments from attractions suggest that although attractions were closed for a significant amount of time in both 2020 and 2021, they were able to open during the key summer period in 2021. Some attractions said they fared very well during the summer of 2021, and some even said they set new records.

*“We ended up with a really bumper year. The summer was incredibly busy. It was even busier than pre-pandemic years. In June we were up by 35% compared with June 2019, and 40% up in July compared with July 2019”*  
Outdoor attraction

### Comparisons by admission type

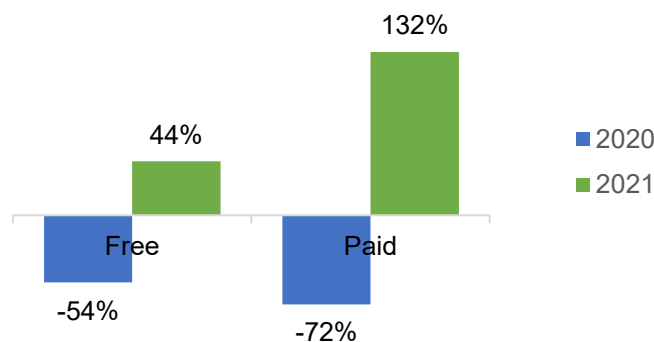
7.7 Figure 7.2 below shows the year-on-year percentage change in visitors from 2020 to 2021, by admission type, using data from attractions that completed the 2019, 2020 and 2021 surveys.

7.8 Paid attractions saw a larger decrease in visitors numbers in 2020 than free attractions. Visits to paid attractions fell by 72% whilst visits to free attractions fell by 54%.

7.9 Paid attractions saw a greater increase in visitor figures in 2021 (132%) compared to free attractions (44%).

Figure 7.2

#### Change in visitor numbers by admission type



Base: attractions providing data for 2019, 2020 and 2021 (219)<sup>13</sup>

7.10 Paid and free attractions are now in a comparable position when comparing visitor numbers between 2021 and 2019 (pre-pandemic). Visitor numbers to free attractions were 34% lower than they were in 2019, whilst visitor numbers to paid attractions were 35% lower.

<sup>13</sup> Please note: For attractions that were closed in 2020 or 2021, we have assumed that if they had been open, they would either have charged or not charged for admission based on whether they charged or not in 2019 or 2020.



7.11 Looking forward to 2022, qualitative comments suggest that some attractions which charge for admission are worried about the rising cost of living affecting their performance in 2022.

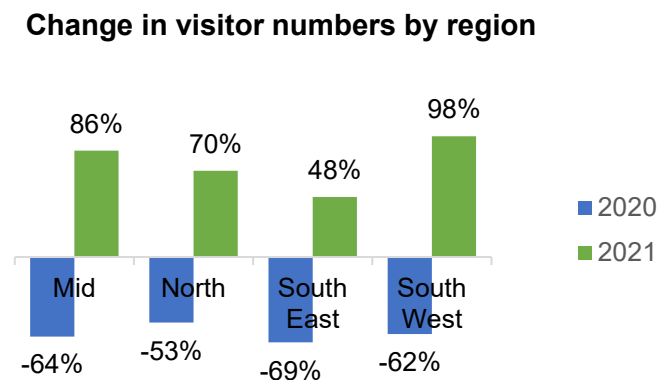
*“The economic climate is not in our favour. People are having to be very strict with what they spend their money on. On days out, people will look for free attractions, or maybe a beach, rather than attractions which charge”*  
Indoor attraction

### Comparisons by region

7.12 Figure 7.3 below shows the percentage change in visitors from 2020 to 2021, by region. Mid Wales and South West Wales saw the highest increase in visitor figures in 2021, with visits to attractions in Mid Wales increasing by 86%, and visits to attractions in South West Wales increasing by 98% from 2020.

7.13 South East Wales saw the smallest increase in visitor figures in 2021 from 2020 (48%), and also the largest decrease in visitor numbers in 2020 from 2019 (69%).

Figure 7.3



Base: attractions providing data for 2019, 2020 and 2021 (219)

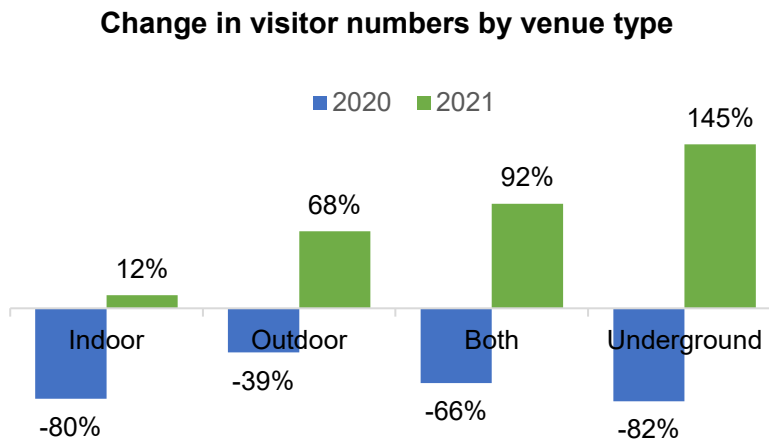
7.14 Visitor numbers to attractions in South East Wales were still 54% lower than visitor numbers in 2019. Visitor numbers to attractions in Mid Wales were 34% lower, whilst the figures for South West Wales and North Wales were 26% and 20% lower respectively.

### Comparisons by venue type

7.15 Figure 7.4 shows the percentage change in visitors from 2020 to 2021, by venue type. Underground attractions saw the largest increase in visitor numbers in 2021 from 2020 (145% increase). Please note, there are only four underground attractions that completed the survey.

7.16 In comparison, indoor attractions saw the smallest increase in visitor numbers in 2021 from 2020 (12% increase).

Figure 7.4



Base: attractions providing data for 2019, 2020 and 2021 (219)

7.17 Visitor numbers to indoor attractions in 2021 were still 78% lower than in 2019. Despite the significant increase in visitors to underground attractions in 2021, visitor numbers are still 56% below pre-pandemic (2019) levels.

7.18 Visitor numbers to attractions classed as ‘both indoor and outdoor’ were 34% lower than in 2019. Visitor numbers to outdoor attractions bucked the trend, and were 3% higher than pre-pandemic levels (2019).

7.19 Qualitative comments from attractions suggest they felt that people had a preference over visiting outdoor attractions over indoor attractions, due to ongoing fears over COVID-19.

*“Like many outdoor attractions our visitor figures were up last year. People wanted to visit outdoor areas over indoor areas. The long-term challenge is whether it’s sustainable”*

Outdoor attraction

*“People were put off by the tight compartments. They were still wary about Covid. Some people just didn’t want to be in small compartments, and even though we had masks and windows open, they would choose not to visit. A high percentage of our visitors are older, and they were a higher risk, and we definitely saw a drop there”*

Both indoor and outdoor attractions

*“The biggest issue was the legacy of Covid, and in particular, the change in visitor behaviour, so wanting to visit outdoor areas and not indoor areas”*

Indoor attraction

7.20 As a result of this change in visitor behaviour, outdoor attractions also said that they had an increase in new visitors. Some of those who took part in a follow-up interview said that these new visitors have continued to visit their attraction in 2022.

*“We had a lot of visitors who had never visited us before. We were open before indoor attractions, and people wanted to get outside after two years of being indoors. So far, we’re at the same level as last year, but we’ll see in the summer holidays whether this trend has continued”*

Outdoor attraction

*“It was just people wanting to go out. We had a lot of new visitors. In fact, they were so new that they didn’t wear the appropriate clothing”*

Outdoor attraction

*“We’re still really busy this year, so we have some hope that the new visitors from 2021 will keep on coming back to us. Early indications show that we’re similar to last year, but it all depends on the summer season”*

Outdoor attraction

7.21 A few qualitative comments suggest that indoor attractions would like support from Visit Wales to encourage people back to indoor attractions.

*“Visit Wales have focused on the outdoor market for years now. I understand why the Year of the Outdoors was extended from 2020 to 2021, but it’s the indoor attractions that need support now. We’ve had no exposure for two years”*

Indoor attraction

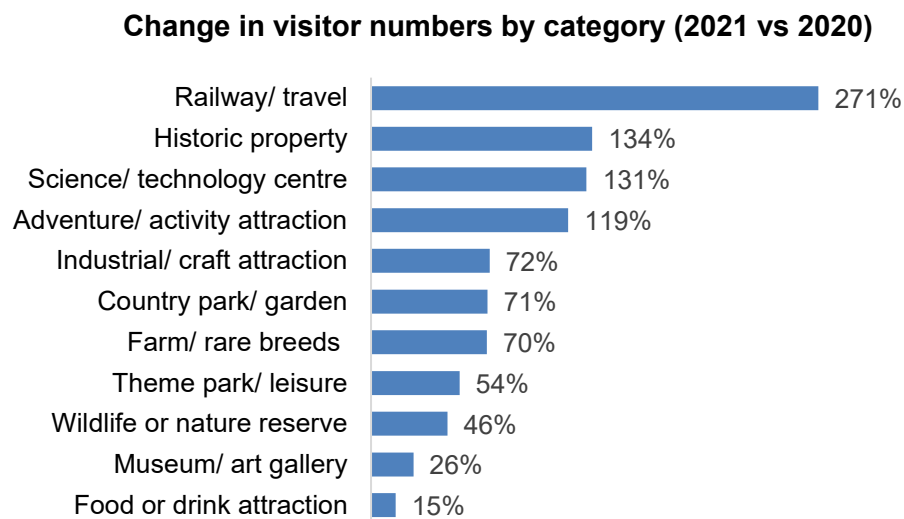
### **Comparisons by category**

7.22 Figure 7.5 overleaf shows the percentage change in visitors from 2020 to 2021, by attraction category.

7.23 Railway/travel attractions saw a considerable increase in visitors in 2021 from 2020. Visits to these types of attractions increased by 271%. Railway/travel attractions were hit significantly in 2020, and had 83% fewer visitors in 2020 from 2019 (figures from previous survey, and different sample).

7.24 A number of attraction types saw an increase in visitor numbers of 100% or more. However, the attraction categories which saw the largest increases in 2021 also saw some of largest decreases in visitors figures in 2020 from 2019.

Figure 7.5

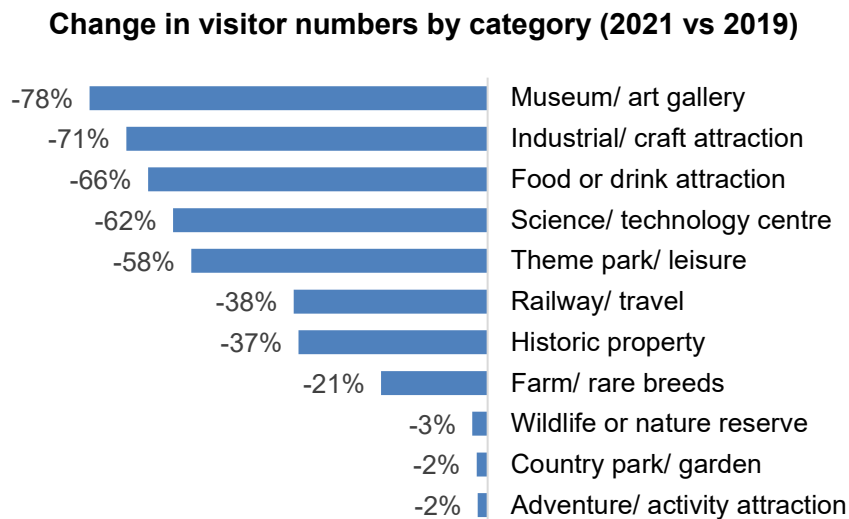


Base: attractions providing data for 2020 and 2021, excluding attractions classed as 'other' (216)

*Caution: Small sample sizes for 'science/technology', 'theme park/leisure', 'food and drink', and 'farms/ rare breeds' attractions*

- 7.25 Figure 7.6 overleaf shows the percentage change in visitors between 2021 and 2019, by attraction category.
- 7.26 The number of visitors to some attraction types in 2021 were similar to the number of visitors received pre-pandemic in 2019. Visitor numbers to adventure/activity attractions and country parks/gardens were only 2% lower in 2021 than in 2019, whilst visitors numbers to wildlife/nature reserve attractions were only 3% lower in 2021 than in 2019.
- 7.27 Visitor numbers to museums/art galleries in 2021 were still well below 2019 pre-pandemic levels. Visitor numbers to these attractions were 78% lower in 2021 from 2019 levels.
- 7.28 Similarly, visitor numbers to industrial/craft attractions were 71% lower in 2021 from 2019 levels, and visitor numbers to food or drink attractions were 66% lower.

Figure 7.6



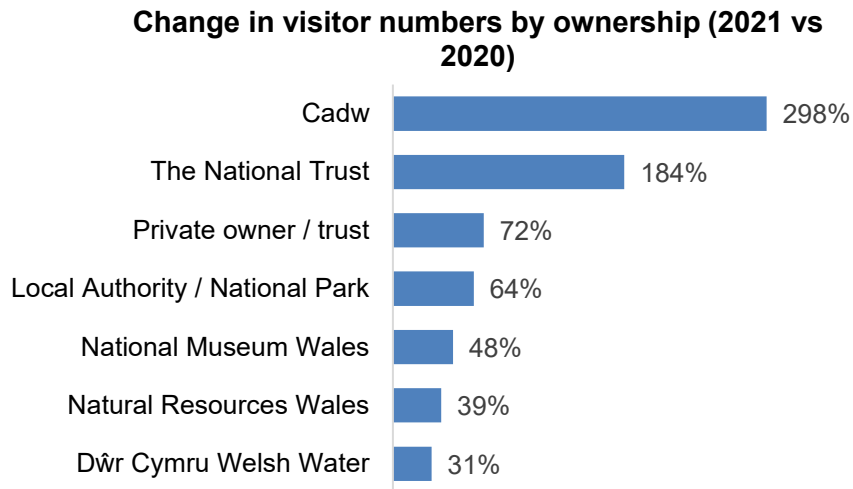
Base: attractions providing data for 2019, 2020 and 2021, excluding attractions classed as 'other' (216)

*Caution: Small sample sizes for 'science/technology', 'theme park/leisure', 'food and drink', and 'farms/ rare breeds' attractions*

### Comparisons by ownership

- 7.29 Figure 7.7 overleaf shows the percentage change in visitors from 2020 to 2021, by attraction ownership type. Attractions operated by RSPB have not been included as the sample size is too small to make comparisons between previous years.
- 7.30 Cadw were one of the operators to have suffered some of the most significant decreases in 2020 from 2019. Therefore, it is no surprise that their visitor numbers increased significantly in 2021 from 2020 (increase of 298%).
- 7.31 Visitor numbers also increased significantly for attractions operated by The National Trust, an increase of 184%.

Figure 7.7

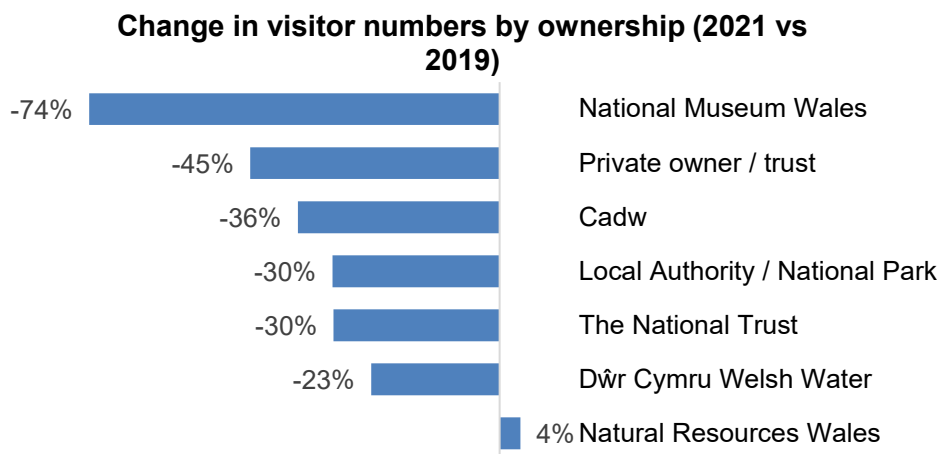


Base: attractions providing data for 2020 and 2021, excluding attractions operate by RSPB (216)

7.32 Figure 7.8 below shows the percentage change in visitors between 2021 and 2019, by attraction category. Visits to attractions operated by Natural Resources Wales were 4% higher than the number of visits to their sites in 2019. Visits to all other ownership types were still below their pre-pandemic (2019 levels).

7.33 National Museum Wales only saw a modest increase in visitors in 2021 from 2020 (48%), compared to some of the other ownership types (see figure 7.7 above). It is no surprise, therefore, that visitor numbers to National Museum Wales attractions in 2021 were still 74% below 2019 pre-pandemic levels.

Figure 7.8



Base: attractions providing data for 2019, 2020 and 2021, excluding attractions operate by RSPB (216)

## 8. Admission charges

### Overall admission charges for paid attractions

- 8.1 The average admission charge for paid attractions which provided data for 2021 was £11.93 for adults and £7.11 for children.
- 8.2 When comparing admission figures from attractions which provided data for both 2021 and 2020, this shows that admission charges rose by 6% for adults, and 10% for children.
- 8.3 Qualitative comments suggest that attractions needed to recoup losses from 2020, and also factored in the increasing cost in running their attraction. A few mentioned that in addition to the increase in admission in 2021, they have or intend to increase their admission charge for 2022 also.

*“We increased our prices in 2021 to recoup losses as we had to take out loans to sustain ourselves. The increase in supply costs this year has gone haywire. We’ve had to put prices up twice this year [2022]. It’s the customer at the end of the day who will have to pay the additional costs”*

Outdoor attraction

*“Our prices increased for 2021 to try and get money back as we’ve been very short on money, and the demand was there, so we felt we could increase prices and still be busy”*

Outdoor attraction

*“Our increase in visitors has come with its challenges. We increased our prices in late 2021 as we needed to improve our facilities from having so many more visitors in 2021. But if prices continue to increase, then we’ll need to put up our prices again, to cover things like electricity”*

Both indoor and outdoor attraction

### Average admission charge by region

- 8.4 Average adult admission charges for attractions providing data were between £12.50 and £13.70 for Mid Wales, North Wales, and South East Wales. The average adult admission charge for attractions in South West Wales was much lower at £8.89.
- 8.5 Average child admission charges were also similar for Mid Wales, North Wales, and South East Wales. The average child admission charge for these regions ranged between approximately £7.40 and £7.90. Once again, admission charges were lowest amongst attractions from South West Wales at £5.22.

Figure 8.1: Average admission charge by region

Average admission charge	Base	Average adult admission	Average child admission
Mid	24	£13.68	£7.69
North	51	£12.67	£7.92
South East	39	£12.69	£7.42
South West	36	£8.89	£5.22
Total/ overall average	150	£11.93	£7.11

Base: attractions providing data for 2021

### Average admission charge by ownership

8.6 Average admission charges were highest for private owners/trusts. The average admission charge for these was £13.62 for adults, and £7.92 for children.

8.7 Average admission charges were lowest for attractions operated by Cadw. The average admission charge for attractions operated by Cadw was £6.53 for adults, and £4.57 for children.

Figure 8.2: Average admission charge by ownership

Average admission charge	Base	Average adult charge	Average child charge
Cadw	19	£6.53	£4.57
Local Authority / National Park	14	£9.90	£7.31
National Trust	13	£9.65	£4.83
Private owner / trust	102	£13.62	£7.92
Total/ overall average	148	£11.93*	£7.11*

Base: attractions providing data for 2021, excluding sites operated by RSPB due to low sample

\*Total amongst all attractions providing data (including RSPB)

8.8 When comparing admission figures from attractions which provided data for both 2021 and 2020, this shows that admission charges rose highest for attractions operated by Cadw (16% increase for adults and 37% increase for children). However, as noted above, admission charges for attractions operated by Cadw were lowest in 2021.

8.9 Admission charges also rose for attractions operated by local authorities/national parks, and attractions operated by private owners/trusts. However, these were much smaller increases.



8.10 Please note that the sample for local authority/national parks is low as most of these attractions do not charge for admission. There is not enough sample to compare admission figures from National Trust attractions.

Figure 8.3: Average admission charge by ownership

Average admission charge	Base	Percentage change in adult admission charge	Percentage change in child admission charge
Cadw	18	16%	37%
Local Authority / National Park	9	8%	2%
Private owner / trust	55	3%	5%

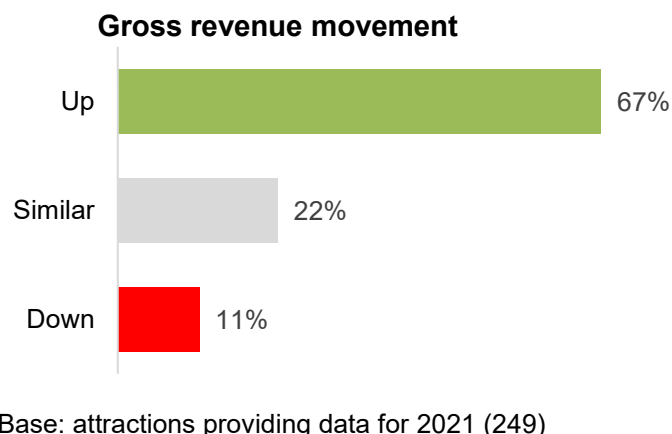
Base: Attractions providing data for 2021 and 2020 (82), excluding sites operated by RSPB or National Trust due to low sample

## 9. Operations

### Gross revenue movement

- 9.1 Around two-thirds (67%) of attractions reported a growth in revenue in 2021 compared to 2020, whilst 22% said their revenue was the same, and 11% said their revenue decreased.
- 9.2 In comparison, and as noted earlier, 85% of attractions said their visitor numbers increased in 2021 from 2020. Therefore, an increase in visitors in 2021 did not correlate into increased revenue for all attractions.
- 9.3 When looking at results by venue type, 70% of outdoor attractions reported an increase in revenue in 2021, whilst only 42% of indoor attractions reported an increase in revenue. 80% of attractions which class themselves as both indoor and outdoor attractions also saw an increase in revenue, and all four underground attractions reported an increase in revenue.

Figure 9.1



- 9.4 Those whose revenue increased were asked what the percentage increase was, if known. Of the 166 attractions that reported an increase in revenue for 2020, 69 were able to provide the percentage increase. The average percentage increase amongst these attractions was 95%.
- 9.5 Of the 29 attractions that reported a decrease in revenue in 2020, only 12 were able to provide the percentage decrease. The average percentage decrease amongst these attractions was 48%.

### Overall employment in 2021

- 9.6 Attractions were asked to provide a breakdown of employees and volunteers in tourism-related activities in 2021.
- 9.7 Unpaid seasonal volunteers accounted for the largest proportion of workers (32%), followed by full-time permanent staff (23%).

- 9.8 Overall, permanent staff – whether full-time, part-time or unpaid, accounted for 47% of staff, whilst seasonal staff accounted for 53% of staff in 2021.
- 9.9 Data for 2020 and 2019 shows that the proportion of staff for each category in 2021 was relatively similar to either the figures from 2020, or the figures from 2019. Data for each category is likely to fluctuate each year due to the different sample of attractions completing the survey each year, or being able to answer this question in particular.
- 9.10 Last year’s report highlighted that seasonal staff were hit harder than permanent staff. In 2019 seasonal staff accounted for 57% of staff. In 2020, seasonal staff only accounted for 39% of staff. In 2021, seasonal staff accounted for 53% of staff, suggesting there may have been an increase back to near pre-pandemic levels in the proportion of staff who are seasonal.

Figure 9.2: Overall employment in 2019, 2020 and 2021

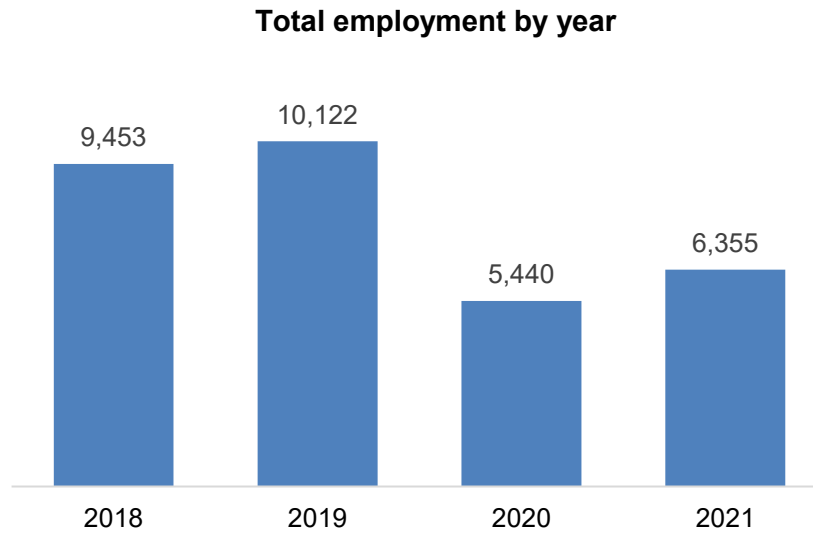
Employee type		No. of employees	% of staff 2021	% of staff 2020	% of staff 2019
Permanent	Full-time	1,441	23%	25%	17%
	Part-time	822	13%	22%	14%
	Unpaid volunteers	693	11%	15%	12%
Seasonal	Full-time	209	3%	3%	3%
	Part-time	1,126	18%	15%	11%
	Unpaid volunteers	2,064	32%	21%	43%
Total		6,355	100%	100%	100%

Base: attractions providing data for 2019 (274), 2020 (235) and 2021 (230), (2019 and 2020 data taken from previous survey)

### Change in employment

- 9.11 Figure 9.3 overleaf shows the total employment between 2021 and 2018. Please note that there is a different sample for each year, meaning that this is not a like for like comparison of attractions. However, this data may provide an indication of employment trends in the sector.
- 9.12 In 2021, attractions employed 6,355 staff, whilst in 2020 attractions employed 5,440 staff. This is an increase of 17%. There was also a 17% increase amongst attractions which provided data for both 2021 and 2020 (a like for like comparison).
- 9.13 However, the chart overleaf suggests that employment levels in 2021 had still not recovered to pre-pandemic levels. In 2019, attractions employed 10,122 staff, whilst in 2018 attractions employed 9,453 staff. Therefore, although there was a 17% increase in staff between 2021 and 2020, the number of staff employed by attractions in Wales was likely still well below pre-pandemic levels.

Figure 9.3



Base: attractions providing data for 2021 (230), 2020 (235), 2019 (274), or 2018 (248) (2020-2018 data taken from previous surveys)

- 9.14 Qualitative comments from attractions suggest that recruitment was a significant challenge in 2021. Even if attractions wanted to hire more staff, not all were able to fill the positions they were recruiting for. This issue has continued for some into 2022.

*“I’ve been here twenty-two years and I’ve never had a problem with recruitment, and I’m used to 100 applications per job. This didn’t happen in 2021 and I was short in certain areas, we weren’t able to recruit. This meant shorter operating hours and a reduction in services. The problem spilled over into this year, but it’s not as bad now”*  
Both indoor and outdoor attraction

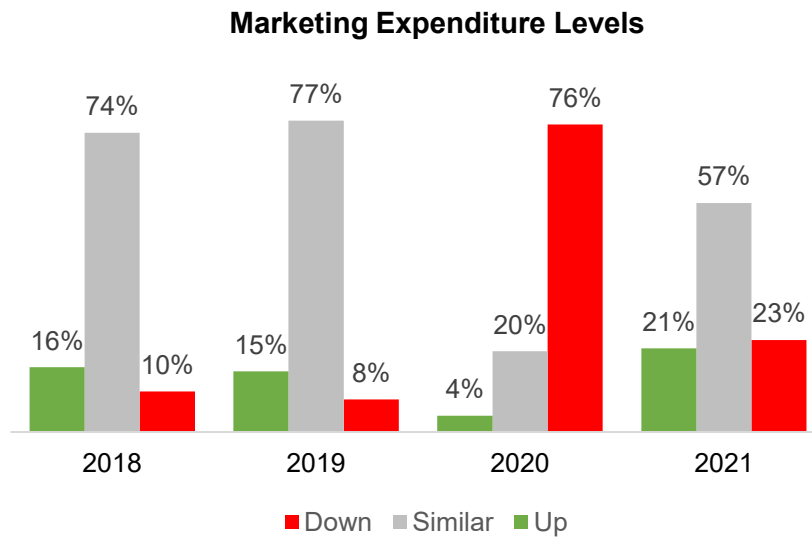
*“The main problem for us in 2021 was that even after we could reopen, there weren’t enough staff around. We would normally recruit a lot of seasonal workers in the summer. Not many were from overseas, but a few were. The problem is that other businesses in the area also missed those overseas workers, and now we’re competing over a very small pool of people. It’s actually worse this year”*  
Outdoor attraction

### Marketing expenditure levels

- 9.15 Figure 9.4 overleaf shows the marketing expenditure levels for each year. In each survey, attractions were asked whether their marketing expenditure was up on the previous year, similar, or down on the previous year.
- 9.16 In both 2018 and 2019, approximately three-quarters of attractions said that their marketing expenditure was similar to the previous year. Due to the COVID-19 pandemic, it is no surprise that in 2020, 76% of attractions said that their marketing expenditure was down on the previous year.

9.17 Over half of attractions (57%) said that their marketing expenditure in 2021 was similar to that of 2020. 21% of attractions said their marketing expenditure was up, whilst 23% said their marketing expenditure was down on 2020.

Figure 9.4



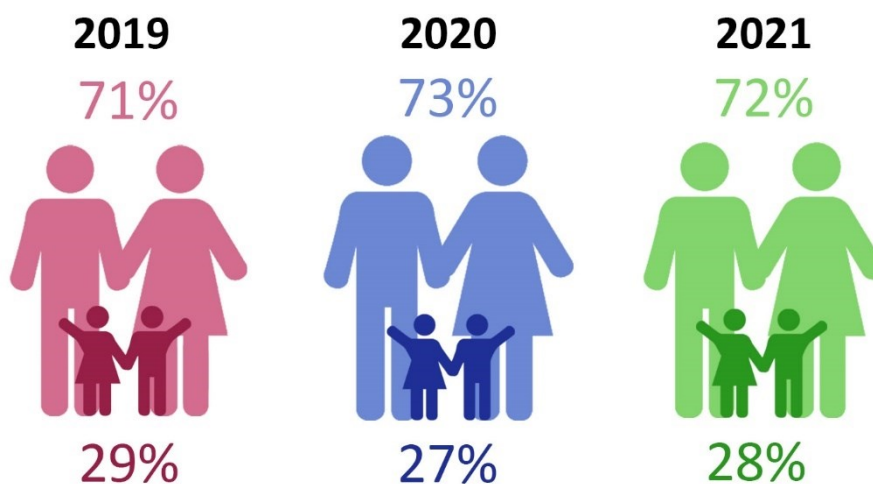
Base: attractions providing data for 2018 (213), 2019 (290), 2020 (254) and 2021 (242)

## 10. Visitor profile for 2021

### Proportion of adult and child visits

10.1 Attractions were asked to estimate what proportion of their visitors were adults, and what proportion were children. In 2021, 72% of visitors were adults and 28% were children. These are similar to estimates in 2020 and 2019.

Figure 10.1: Proportion of adult and child visits overall for 2021



Base: attractions providing data for 2019 (287), 2020 (187) and 2021 (208)

### Proportion of adult and child visits by attraction category

10.2 Figure 10.2 overleaf shows that the majority of visitors were adults for most attraction categories, with the exception of farm / rare breeds attractions, where 52% of visitors were children. For food and drink attractions, the vast majority of visitors (91%) were adults. Many of these attractions do not allow children

10.3 The table has been arranged from highest to lowest by the proportion of visitors which are adults.

Figure 10.2: Proportion of adult and child visits by attraction category for 2021

Attraction category	Base 2021	Average % adult visitors 2021	Average % child visitors 2021
Food or drink attraction	9	91%	9%
Industrial/ craft attraction	14	78%	22%
Museum/ art gallery	56	78%	22%
Historic property	34	76%	24%
Country park/ garden	23	72%	28%
Wildlife or nature reserve	17	71%	29%
Science/ technology centre	4	70%	30%
Railway/ travel	18	67%	33%
Adventure/ activity attraction	14	62%	38%
Theme park/ leisure	4	62%	38%
Other attraction	3	58%	42%
Farm/ rare breeds	12	48%	52%
Total / overall average	207	72%	28%

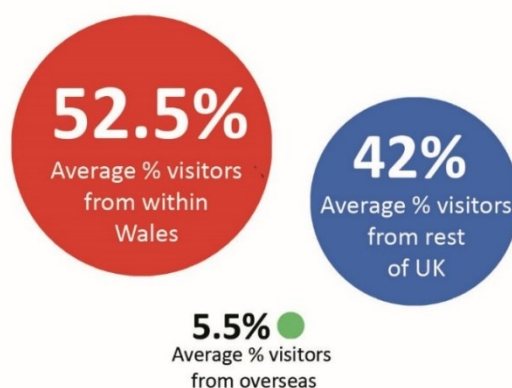
Base: attractions providing data for 2021

*Caution: Small sample sizes*

### Origin of visitors for 2021, 2020 and 2019

- 10.4 Attractions were asked to estimate what proportion of their visitors were from Wales, the rest of the UK, and overseas. The estimated average number of visitors from Wales was 52.5%, lower than 2020 (59%), but higher than 2019 (47%).
- 10.5 The proportion estimated to be from the rest of the UK was 42%, higher than 2020 (38%), and the same as 2019 (42%). The proportion from overseas (5.5%) was higher than 2020 (3%), but lower than 2019 (10%).

Figure 10.3: Origin of visitors for 2021

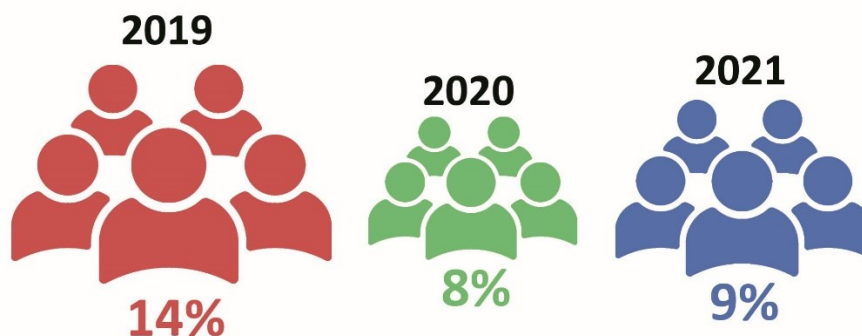


Base: attractions providing data for 2021 (203)

## Proportion of visitors in organised groups / tours for 2021, 2020 and 2019

10.6 The proportion of visitors that were estimated to be from organised groups or tours in 2021 was 9%, which is similar to the estimate provided for 2020 (8%). When comparing 2021 and 2019, there was only a 5% difference between the proportion of visitors from groups or tours.

Figure 10.4: Proportion of visitors in organised groups / tours for 2019, 2020 and 2021



Base: attractions providing data for 2019 (287), 2020 (186) and 2021 (201)

10.7 Although the proportion of visitors from groups is not too dissimilar from 2019, qualitative comments suggest that for some attractions, particularly those who rely on coach or school visits, this severely affected their performance in 2021. Some of these attractions said that they had a high number of regular visitors, but their group visits did not recover to pre-pandemic levels.

*“Our Autumn is normally propped up by school visits and coach visits. Coach companies were finding it difficult to fill coaches, as the demographic tends to be older, and they might usually fill a coach of 40-70 people. But the coaches were not full at all. And then also we had fewer school visits, they weren’t back in to the swing of things, and the effects of Covid have impacted on them for a long time, and even into 2022. So things like staff absences, catching-up with content before the end of term or exams and so on. So school trips just weren’t possible”*

Indoor attraction

*“School bookings were massively impacted. Especially with the bubbles, and keeping different classes and different schools separate. It was a difficult logistical challenge, and obviously we couldn’t operate properly in this way. But also things would change at the last minute, for example a lack of staff, or other school challenges, and then they would cancel”*

Indoor attraction



## 11. Alphabetical list of attractions responding to the survey

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Aberconwy House	N	NT	HP	-	-
Aberdulais Tin Works and Waterfall	SW	NT	IND	-	-
Aberglasney Gardens	SW	PO	CP	41,500*	£9.75
Aberystwyth School of Art Museum and Galleries	M	LA/NP	MAG	500*	-
Afan Argoed Forest Park	SW	NRW	WL	117,279*	-
Airworld Aviation Museum	SE	PO	MAG	6,033	£6.50
Alpaca my Boots	M	PO	Farm	3,000*	£25.00
Alyn Waters Country Park	N	LA/NP	CP	239,289*	-
Amelia Trust Farm	SE	PO	Farm	20,000*	£4.80
Amgueddfa Syr Henry Jones	N	PO	HP	40*	-
Amgueddfa'r Mor Porthmadog Maritime Museum	N	PO	MAG	4,521	£2.00
Ancre Hill Vineyard	SE	PO	F/D	476	-
Andrew Logan Museum of Sculpture	SW	PO	MAG	3,000*	£5.00
Anglesey Model Village	N	PO	OTH	8,656	£5.50
Arthog Bog	N	RSPB	WL	500*	-
Bardsey Island	N	PO	WL	3,269	£30.00
Barry Island Pleasure Park	SE	PO	Theme	1,250,000*	-
Beaumaris Castle	SE	Cadw	HP	99,018	£7.40
Beaumaris Gaol & Court	N	PO	HP	70,000*	£9.00
Big Pit National Coal Museum	SE	AC-NMW	MAG	27,792	-
Blaenavon Community Heritage & Cordell Museum	SE	PO	MAG	252	£2.00
Blaenavon Ironworks	N	Cadw	HP	9,389	£5.90
Blaenavon World Heritage Centre	SE	LA/NP	IND	17,070*	-
Bodnant Garden	N	NT	CP	239,790	£14.00
Bodrhyddan Hall	N	PO	HP	1,293	£10.00
Brechfa Forest	SW	NRW	WL	7,412*	
Brecon Mountain Railway	M	PO	R/T	25,000*	£16.50
Brynmawr & District Museum	SE	LA/NP	MAG	225*	-
Cadair Idris National Nature Reserve	N	NRW	WL	46,495*	-
Cadeirlan Deiniol Sant my Mangor   Saint Deiniol in Bangor	N	PO	HP	2,000*	-
Cae Dai Trust Museum	N	PO	MAG	3,161*	£5.00
Cae Hir Gardens	SW	PO	CP	3,500*	£6.00
Caerau Gardens	N	PO	CP	2,500	£4.50
Caerleon Roman Baths	N	Cadw	HP	-	-

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Caernarfon Castle	SE	Cadw	HP	76,273	£9.90
Caerphilly Castle	SE	Cadw	HP	49,451	£9.00
Caldey Island	SW	PO	WL	60,000*	£2.00
Cambrian Heritage Railways (Oswestry)	M	PO	R/T	-	-
Canolfan Hywel Dda	SW	LA/NP	HP	70*	-
Canolfan Rhiannon	M	PO	IND	2,000*	-
Canolfan Y Plase	N	PO	MAG	-	-
Cardiff Bay Cruises (Cardiff Waterbus)	SE	PO	R/T	19,955	£7.00
Cardiff Boat Tours Ltd - Princess Katharine + Singfly	SE	PO	R/T	32,311	£5.00
Cardiff Castle	SE	LA/NP	HP	372,606	£14.50
Cardiff Open Top Tours	SE	PO	R/T	16,228	£14.00
Cardigan Bay Marine Wildlife Centre	SW	PO	WL	9,239	-
Cardigan Island Coastal Farm Park	M	PO	WL	32,000*	£4.90
Carew Castle & Tidal Mill	SW	LA/NP	HP	45,000*	£6.50
Carmarthenshire Museum	SW	LA/NP	MAG	-	-
Castell Aberteifi / Cardigan Castle	M	PO	HP	21,500*	£6.00
Castell Coch	SE	Cadw	HP	23,095	£7.40
Castell Henllys Iron Age Village	SW	LA/NP	HP	13,601	£6.50
Cefn Coed Colliery Museum	SW	LA/NP	MAG	-	-
Centre for Alternative Technology	M	PO	SC/T	14,013	£8.50
Ceredigion Museum	M	LA/NP	MAG	7,956	-
Ceunant Llenyrch National Nature Reserve	N	NRW	WL	18,676*	-
Chapel Bay Fort & Museum	SW	PO	MAG	-	-
Chepstow Castle	SE	Cadw	HP	44,688	£5.90
Chepstow Museum	SE	LA/NP	MAG	5,637	-
Chirk Castle and Garden	N	NT	HP	102,263	£8.00
Cilgerran Castle	M	Cadw	HP	-	-
Clerkenhill Adventure Farm and Frizbee Golf	SW	PO	A/A	20,000*	£8.50
Cloverlands Model Car Museum	M	PO	MAG	150*	£3.00
Clydach Ironworks	SE	LA/NP	IND	-	-
Coed Cerrig-y-Gleisiad National Nature Reserve	M	NRW	WL	6,140*	-
Coed y Brenin Forest Park	N	NRW	WL	113,946*	-
Coedydd Aber National Nature Reserve	N	NRW	WL	66,033*	-
Colby Woodland Garden	SW	NT	CP	53,955*	-
Coles	SW	PO	F/D	40*	£12.50

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Constitution Hill Ltd trading as Aberystwyth Cliff Railway	M	PO	R/T	64,381	£5.50
Conwy Castle	N	Cadw	HP	152,281	£9.90
Conwy Suspension Bridge	N	NT	HP	-	-
Copper Kingdom, Amlwch	N	PO	IND	3,000*	£7.00
Corris Railway	M	PO	R/T	6,238	-
Cosmeston Lakes Country Park	SE	LA/NP	CP	275,000*	-
Cosmeston Medieval Village	SE	LA/NP	HP	1,490	£5.10
Court Cupboard Gallery (Black Mountain Circle Ltd)	SE	PO	MAG	2,181	-
Craig-y-Nos Country Park	SE	LA/NP	CP	93,350*	-
Criccieth Castle	N	Cadw	HP	31,527	£5.80
Cwm Rhaeadr	SW	NRW	WL	4,697*	-
Cwm Weeg Gardens	M	PO	CP	278	£6.00
Cwmcarn Forest	SE	NRW	WL	234,177*	-
Cwmdud / Nant Gronw	SW	NRW	WL	2,156*	-
Cwrw Llyn Cyf	N	PO	F/D	-	-
Cyfarthfa Castle Museum and Art Gallery	SE	LA/NP	MAG	11,480	£2.30
Cynon Valley Museum Trust	SE	PO	MAG	2,110	-
Da Mhile	SW	PO	F/D	2,647*	£5.00
Dan-Yr-Ogof, the National Showcaves Centre for Wales	SE	PO	MAG	63,198	£16.50
Dare Valley Country Park	SE	LA/NP	CP	117,070*	-
Denbigh Castle	N	Cadw	HP	9,282	£4.30
Devil's Bridge Falls	M	PO	CP	58,000*	£4.00
Dinas Rock	SW	NRW	WL	56,774*	-
Dinosaur Park (The)	SW	PO	A/A	124,000*	£15.95
Dolaucothi Gold Mines	SW	NT	IND	4,129	£10.00
Duffryn Sheep Walking	SE	PO	Farm	800*	£16.00
Dyfed Shire Horse Farm	SW	PO	Farm	10,000*	£7.95
Dyffryn Fernant Garden	SW	PO	CP	4,309*	£7.00
Dyffryn Gardens	SE	NT	CP	115,381	£10.00
Dyfi Forest (incl Tan-y-Coed and Pen-y-Bryn)	M	NRW	WL	53,653*	-
Dyfi Wildlife Centre	M	PO	WL	20,000*	£6.00
Dylan Thomas Birthplace	SW	LA/NP	MAG	750*	£8.00
Dylan Thomas Boathouse	SW	LA/NP	MAG	-	-
Dylan Thomas Centre	SW	LA/NP	OTH	-	-
Egypt Centre - Museum of Egyptian Antiquities	SW	PO	MAG	3,845*	-

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Elan Valley	M	DCWW	WL	163,582	-
Erddig	N	NT	HP	11,000	£8.00
Fairbourne and Barmouth Steam Railway	N	PO	R/T	20,000*	£11.50
Falconry Experience Wales	M	PO	WL	750*	£110.00
Fantasy farm Park	M	PO	A/A	6,300*	† <sup>14</sup>
Ffestiniog and Welsh Highland Railways	N	PO	R/T	123,828	£43.00
Ffin Y Parc Gallery	N	PO	MAG	28,000*	-
Ffotogallery	SE	PO	MAG	14,522	-
Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	SE	PO	MAG	51,663	£14.50
Folly Farm	SW	PO	Farm	348,689	£19.95
Folly Tower (Pontypool)	SE	PO	HP	-	-
Fonmon Castle	SE	PO	HP	53,000*	£13.50
Fourteen Locks Canal Centre	SE	PO	HP	10,786	-
Garwnant Forest	SE	NRW	WL	91,660*	-
Glynn Vivian Art Gallery	SW	PO	MAG	12,504*	-
Golden Grove and Gelli Aur Country Park	SE	PO	HP	22,500*	-
Good Day Out	M	PO	Farm	600*	£35.00
Gower Brewery Company Ltd	SW	PO	F/D	-	-
Gower Heritage Centre	SW	PO	F/D	20,000*	£5.00
Great Orme Country Park Visitor Centre	N	LA/NP	CP	-	-
Great Orme Mines	N	PO	A/A	27,677	£9.00
Great Orme Tramway	N	LA/NP	R/T	105,000*	£9.50
Greenfield Valley Heritage Park	N	LA/NP	CP	18,000*	£6.70
Greenmeadow Community Farm	SE	LA/NP	Farm	28,952	£6.50
Gregynog Hall	M	PO	HP	3,860*	-
Gwinllan Conwy Ltd	N	PO	F/D	928*	£35.00
Gwrych Castle	N	PO	HP	103,358	£5.00
Gwydir Forest Park	N	NRW	WL	408,511*	-
Halen Mon - Anglesey Sea Salt Co	N	PO	F/D	-	-
Harbwr Tenby Harbour Brewery	SW	PO	F/D	-	-
Harlech Beach National Nature Reserve	N	NRW	WL	175,550*	-
Harlech Castle	N	Cadw	HP	90,130	£7.40
Heatherton Country Sports Park	SW	PO	A/A	210,000*	-

<sup>14</sup> † Free for adults but an admission charge for children

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
High Glanau Manor Gardens	SE	PO	CP	1,000*	£6.00
Holyhead Maritime Museum	N	PO	MAG	1,700	£5.00
Horse Drawn Boat Centre (The)	N	PO	R/T	26,000*	£8.50
Inigo Jones Slate Works	N	PO	IND	9,010	£6.50
Internal Fire Museum of Power	M	PO	MAG	-	-
Joseph Parry's Ironworker's Cottage	SE	LA/NP	IND	-	-
Kidwelly Castle	SW	Cadw	HP	24,906	£5.80
Kymin (The)	SE	NT	HP	-	-
Lampeter Town Museum	M	PO	MAG	-	-
Laugharne Castle	SW	Cadw	HP	17,092	£4.30
LC Swansea	SW	PO	Theme	285,047*	£8.00
Llandegfedd	SE	DCWW	WL	201,868	-
Llanelli Wetland Centre	SW	PO	WL	45,000*	£9.18
Llanerchaeron	M	NT	HP	30,068	£8.00
Llanfair Slate Caverns & Farm Park	N	PO	A/A	31,000*	£7.00
Llangollen Motor Museum	N	PO	MAG	-	-
Llangollen Museum	N	PO	MAG	3,000*	-
Llanidloes Museum and Library	M	PO	MAG	3,393*	-
Llantarnam Grange Arts Centre	SE	PO	MAG	18,480	-
Llantrisant Guildhall	SE	LA/NP	HP	3,521	-
Llanvihangel Court	SE	PO	HP	-	-
Llanymynech Wharf Visitor Centre	M	PO	IND	400*	£4.00
Llanyrafon Mill	SE	LA/NP	IND	175	-
Llyn Alwen and Llyn Brenig	N	NRW	WL	107,272*	-
Llyn Brenig Visitor Centre	N	DCWW	WL	128,122	-
Llynonn Mill	N	PO	IND	1,000*	£2.60
Llys Y Fran	SW	DCWW	WL	81,834	-
Maesfron Hall and Gardens	M	PO	CP	550*	£5.00
Manor House Wildlife Park	SW	PO	Farm	95,231	£17.95
Manorbier Castle	SW	PO	HP	17,000*	£5.50
Margam Country Park	SW	PO	CP	305,678	-
Merthyr Mawr Warren National Nature Reserve	SE	NRW	WL	72,716*	-
Mid Wales Arts	M	PO	MAG	8,800*	-
Minera Lead Mines	N	LA/NP	CP	-	-
Moel Famau Forest	N	NRW	WL	72,402*	-
Mold Library Museum and Art Gallery	N	PO	MAG	200*	-
MOMA Machynlleth	M	PO	MAG	2,922*	-

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Monmouth Museum	SE	LA/NP	MAG		-
Morfa Dyffryn National Nature Reserve	N	NRW	WL	64,084*	-
Museum of Cardiff, Old Library, The Hayes, Cardiff	SE	LA/NP	MAG	3,250	-
Nant yr Arian	M	NRW	WL	111,206*	-
Narberth Museum	SW	PO	MAG	1,150*	£4.50
National Cycle Collection	M	PO	MAG	1,800*	£5.00
National Museum Cardiff	SE	AC-NMW	MAG	135,725	-
National Roman Legion Museum	SE	AC-NMW	MAG	10,720	-
National Slate Museum	N	AC-NMW	MAG	71,686	-
National Trust Stackpole / Stackpole Nature Reserve	SW	NT	WL	390,498*	-
National Waterfront Museum Swansea	SW	AC-NMW	MAG	41,427	-
National Wool Museum	M	AC-NMW	MAG	7,546	-
Newborough National Nature Reserve & Forest	N	NRW	WL	559,939*	-
Newport Medieval Ship Project	SE	LA/NP	MAG	263	-
Newport Museum and Art Gallery	SE	LA/NP	MAG	5,902*	-
Newport Wetlands Environmental Education and Visitor Centre	SE	RSPB	WL	56,979	-
Newport Wetlands Nature Reserve	SE	NRW	WL	82,207*	-
Newton House & Dinefwr Park	SW	NT	HP	78,570	£8.00
Newtown Textile Museum	M	PO	MAG	748	-
Norwood Gardens and Tearooms	SW	PO	F/D	500*	£5.00
Nova	N	LA/NP	Theme	200,000*	†
Ocean Lab	SW	LA/NP	WL	2,733	£6.50
Offa's Dyke Centre	SE	PO	MAG	720*	-
Old Market Hall / Llanidloes	M	LA/NP	HP	-	-
Oriel Davies Gallery	M	PO	MAG	20,094	-
Oriel Mon	N	LA/NP	MAG	37,816	-
Oriel Mostyn Gallery	N	PO	MAG	18,898	-
Oxwich Castle	SW	Cadw	HP	-	-
Oxwich National Nature Reserve	SW	NRW	WL	12,948*	-
Parc Bryn Bach	SE	PO	A/A	185,972*	-
Parc Gwledig Morglawdd Caergybi / Holyhead Breakwater Country Park	N	LA/NP	CP	100,000*	-
Parc Howard Museum	SW	PO	MAG	-	-

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Parc Slip Nature Reserve & Visitor Centre	SE	PO	WL	20,000*	-
Parva Farm Vineyard	SE	PO	F/D	4,000*	£2.50
Pembrey Country Park	SW	LA/NP	CP	804,513	-
Pembroke Dock Heritage Centre	SW	PO	MAG	3,190*	£5.00
Pembrokeshire Candle Centre & Museum	SW	PO	MAG	200*	-
Pembrokeshire Llamas	SW	LA/NP	Farm	1,000*	£45.00
Penderyn Distillery (The Welsh Whisky Company)	SE	PO	F/D	20,647*	£11.50
Penrhyn Castle	N	NT	HP	79,491	£12.00
Picton Castle Gardens	SW	PO	HP	55,393	£9.00
Pierhead	SE	LA/NP	HP	-	-
Piggery Pottery	N	PO	IND	12,000*	-
Plantasia Tropical Zoo	SW	PO	A/A	57,783	£7.00
Plas Cadnant Hidden Gardens	N	PO	CP	25,464*	£8.50
Plas Llanelly House	SW	PO	HP	150*	£7.00
Plas Mawr	N	Cadw	HP	10,271	£7.40
Plas Newydd	N	NT	HP	104,998	£10.00
Plas yn Rhiw	N	NT	HP	10,760	£6.00
Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	N	PO	HP	285,411*	-
Pontypool & Blaenavon Railway	SE	PO	R/T	16,333	£10.00
Pontypridd Museum	SE	LA/NP	MAG	-	-
Porth y Swnt	N	NT	WL	1,000*	-
Portmeirion	N	PO	HP	285,191	£15.00
Powis Castle and Garden	M	NT	HP	120,318	£14.00
Principality Stadium Tours	SE	PO	OTH	5,578	£9.95
Quarry Pottery	M	PO	IND	50,000*	-
Radnorshire Museum	M	LA/NP	MAG	1,391	-
Raglan Castle	SE	Cadw	HP	48,669	£7.40
Rheilffordd Llyn Padarn / Llanberis Lake Railway	N	PO	R/T	51,000*	£9.30
Rheilffordd Llyn Tegid / Bala Lake Railway	N	PO	R/T	31,531	£12.00
Rhiw Valley Light Railway	M	PO	R/T	-	-
Rhondda Heritage Park	SE	LA/NP	HP	34,596	£7.95
Rhuddlan Castle	N	Cadw	HP	18,670	£4.30
Rhyl Miniature Railway	N	PO	R/T	30,000*	£3.00
Rhymney Brewery Visitor Centre	SE	PO	F/D	-	-
RibRide	N	PO	A/A	16,000*	£25.00

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Royal Cambrian Academy of Art	N	PO	MAG	7,000*	-
Royal Welch Fusiliers Museum	N	PO	MAG	61,523	-
RSPB Conwy Nature Reserve	N	RSPB	WL	39,490*	£6.00
RSPB Ynys-hir	M	RSPB	WL	9,733	£6.00
Rug Chapel	N	Cadw	HP	-	-
Seaquarium of Rhyl	N	PO	A/A	55,429	£12.50
Senedd	SE	LA/NP	OTH	6,463	-
Snowdon Mountain Railway	N	PO	R/T	98,567	£32.00
South Stack Cliffs Nature Reserve	N	RSPB	WL	87,955*	-
South stack Ynys Lawd lighthouse	N	PO	HP	3,000*	£4.00
St Asaph Cathedral	N	PO	HP	1,009*	-
St David's Bishop Palace	SW	Cadw	HP	19,267	£4.30
St Donats Art centre	M	PO	MAG	-	-
St Fagans National Museum of History	SE	AC-NMW	MAG	221,758	-
St. Mary's Priory and Tithe Barn	SE	PO	HP	1,280*	-
Storiol Gwynedd	N	LA/NP	MAG	10,500*	-
Swansea Museum	SW	LA/NP	MAG	15,192*	-
Swtan Heritage Museum	N	LA/NP	MAG	800*	-
Talacre	N	NRW	WL	181,726*	-
Talgarth Mill	M	PO	IND	300*	-
Tal-y-Llyn Heritage Centre	N	PO	HP	12*	-
Talylylyn Railway	N	PO	R/T	21,000*	£22.00
Tanat Valley Light Railway	M	PO	R/T	-	-
Techniquest	N	PO	SC/T	63,155	£10.90
Tenby Museum and Art Gallery	SW	PO	MAG	2,300	£4.95
The Castle and Regimental Museum, Monmouth	SE	LA/NP	MAG	2,197	-
The Ebbw Vale Works Museum	SE	PO	MAG	-	-
The Gate	SW	PO	MAG	8,327	-
The Gwili Railway	SW	PO	R/T	17,000*	£15.00
The Judge's Lodging	SE	PO	HP	3,329	£8.95
The Magic of Life Butterfly House	M	PO	WL	12,108	£8.00
The Meadows Farm Village	SE	PO	Farm	55,000*	£8.50
The National Coracle Centre	SW	PO	MAG	1,245	-
The Regimental Museum of The Royal Welsh	M	PO	MAG	6,000*	£5.00
The Royal Mint Experience	SE	LA/NP	IND	25,104	£13.50
The Secret Owl Garden	SW	PO	WL	-	-



Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
The Spaceguard Centre	M	PO	SC/T	850	£8.00
The Vale of Rheidol Railway Ltd	M	PO	R/T	42,690	£27.50
Thomas Shop & Museum (The)	M	PO	MAG	50*	-
Timescape Rhayader Amserwedd Rhaeadr Qwy - Formally Rhayader Museum	M	PO	MAG	-	-
Tintern Abbey	SE	Cadw	HP	47,137	£5.90
Tir Prince Fun Park	N	PO	Theme	1,000,000*	-
Tomos Watkin (The Hurns Brewery)	SW	PO	F/D	-	-
Treborrh Botanic Garden, North Wales	N	PO	CP	35,000*	-
Tredegarr House	SE	NT	HP	43,215	£11.00
Tregaron (Cors Caron) National Nature Reserve	M	NRW	WL	47,703*	-
Tregaron Heritage Centre (Canolfan y Barcud - Kite Centre)	M	PO	MAG	50*	-
Tretower Court & Castle	M	Cadw	HP	9,541	£7.40
Tudor Merchant's House	SW	NT	HP	1,341	£6.50
Tŷ Mawr Country Park	N	LA/NP	CP	145,921*	-
Tŷ Mawr Wybrnant	N	NT	HP	-	-
University of South Wales Art Collection Museum	SE	PO	MAG	-	-
Upton Castle Gardens	SW	PO	CP	2,500*	£6.00
Usk Castle	SE	PO	HP	2,000*	£4.00
Valle Crucis Abbey	N	Cadw	HP	4,085	£4.30
Van Road Caerphilly	SE	NRW	WL	17,251*	-
Veddw Garden	SE	PO	CP	600*	£8.50
Wales Ape and Monkey Sanctuary	SE	PO	Farm	21,032	£8.50
Wales Millennium Centre	SE	PO	MAG	92,499	-
Walkers on Snowdon	N	LA/NP	WL	544,489*	-
Walnut Tree Farm Park	SE	PO	Farm	7,000*	£6.00
Welsh Crannog Centre (The)	M	PO	WL	12,000*	-
Welsh Hawking Centre & Wildlife Park	SE	PO	WL	-	-
Welsh Royal Crystal	M	PO	IND	500*	-
Wepre Country Park	N	LA/NP	CP	400,000*	-
West Wales Arts Centre	SW	PO	MAG	8,000*	-
White Castle Vineyard	SE	PO	F/D	1,400*	£17.00
Wildlife Seawatch	SW	PO	WL	10,000*	-
Winding House	SE	LA/NP	SC/T	-	-
Wings of Wales	SE	PO	WL	200*	£120.00

Attraction Name	Region	Owner	Category	2021 visits	£ Adult Admission
Wireless in Wales / Gwefr heb Wifrau	N	PO	MAG	14	-
Wolfscastle Pottery	SW	PO	IND	2,000*	-
Workhouse History Centre	M	PO	HP	1,000*	-
Wrexham County Borough Museum and Archives	N	LA/NP	MAG	8,760	-
Xplore!	N	PO	SC/T	24,000*	£7.50
y Gaer Museum, Art Gallery and Library	M	LA/NP	MAG	22,236*	-
Y Lanfa Powysland Museum and Welshpool Library	M	PO	MAG	850*	-
Ynyslas National Nature Reserve	M	NRW	WL	132,691*	-
Zip World Forest	N	PO	A/A	180,225	£25.00
Zip World Llechwedd Slate Caverns	N	PO	A/A	160,255	£25.00
Zip World Penrhyn Quarry	N	PO	A/A	142,889	£99.00
Zip World Tower	SE	PO	A/A	54,916	£50.00

## 12. **Appendices**

## Visits to Welsh Tourist Attractions 2021

Hoffech chi gwblhau'r arolwg hwn yn y Gymraeg neu'r Saesneg? / Would you like to complete this survey in English or Welsh?

- English / Saesneg
- Cymraeg / Welsh

### About the survey



Please help Visit Wales establish trends in the attractions sector by completing this survey. You will receive a summary of the results, and your key results benchmarked against results for the sector. The full report will be published later this year.


Some data gathered through this research relating to individual businesses, including but not limited to the annual numbers of visitors to each attraction and entry prices, will be published in the final report. Other data gathered through this research will be anonymised for publication.

If you are unable to provide exact figures please supply us with your best estimates.

The privacy policy for this research can be found [here](#).

### Completing the survey

You can use the  and  buttons below to move through each page of the questionnaire. Please do not use your browser's back or forward buttons.

We appreciate that you may not be able to complete the survey in one sitting and the survey may time out if left for longer than an hour so a save facility is available. If you press the  button your responses will be saved and you'll be able to click the link in your original email, go back to the survey and complete it when it suits you.

**Q1**      **What is the name of your attraction?**

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### Visitors (2021)

**Q2**      **Were you open for the whole of 2021 (that is every month)?**

- Yes
- No

**Q3** *If Q2=2.* Which months were you open in 2021?

- |                                   |  |
|-----------------------------------|--|
| <input type="checkbox"/> January  | <input type="checkbox"/> August          |
| <input type="checkbox"/> February | <input type="checkbox"/> September       |
| <input type="checkbox"/> March    | <input type="checkbox"/> October         |
| <input type="checkbox"/> April    | <input type="checkbox"/> November        |
| <input type="checkbox"/> May      | <input type="checkbox"/> December        |
| <input type="checkbox"/> June     | <input type="checkbox"/> None - all year |
| <input type="checkbox"/> July     | <i>If all year, go to Q24.</i>           |

**Q4** What were the total visitor numbers to your attraction during the 2021 calendar year?

*Before providing figures, please:*

- Exclude events outside of normal hours e.g. private hire of venue
- Only count visitors to the attraction, not all visitors to your site, e.g. exclude those only using a café or shop
- Exclude regular members if a leisure or fitness facility
- Exclude theatre goers if a theatre

*Please leave out any commas, e.g. enter 1000 rather than 1,000*

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**Q5** Is this an exact number or an estimate?

- Exact
- Estimate

**Q6** Compared to 2020, did your total visit numbers increase, stay the same or decrease in 2021?

- Increased
- Stayed the same
- Decreased
- Don't know

**Q7** *If Q6=1 or 3.* If your visitor numbers increased or decreased in 2021, what factors do you think caused this?

*Please fully explain your answer*

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**Q8** *If Q5=1* What method(s) did you use for recording visitor numbers in 2021?

*Please tick all that apply*

- From ticket sales and/or group booking sales
- Mechanical or electronic method of counting (e.g. turnstile)
- Manual method of counting numbers
- Other

Please specify 'other'

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**Q9** *If Q5=2* What method(s) did you use for recording / estimating visitor numbers in 2021?

*Please tick all that apply*

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

Please specify 'other'

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**Q10** What percentage of visitors in 2021 were:

Adults % \_\_\_\_\_  
Children % \_\_\_\_\_

**Q11** What percentage of your visitors in 2021 were visiting in organised groups or tours?

\_\_\_\_\_

**Q12** Did you charge for admission to the main attraction in 2021?

- Yes
- No

**Q13** What was the standard admission charge (in high season/ summer) per person for the main attraction in 2021 (including VAT)?

*Please enter 0 if no charge or not applicable*

Adults £ \_\_\_\_\_  
Child £ \_\_\_\_\_

**Q14** What percentage of visitors in 2021 were from:

Overseas % \_\_\_\_\_  
Wales % \_\_\_\_\_  
Rest of the UK (excl. Wales) % \_\_\_\_\_

### Operations (2021)

**Q15** How did the attraction's gross revenue in 2021 compare with 2020?

- Up
- Similar
- Down

**Q16** If known, what was the percentage increase in 2021?

Percentage increase % \_\_\_\_\_

**Q17** If known, what was the percentage decrease in 2021?

Percentage decrease % \_\_\_\_\_

**Q18** Comparing 2021 with 2020, did you see the overall revenue from donations increase, stay the same or decrease?

- Increased
- Stayed the same
- Decreased
- Not applicable / Don't know

### Human resources (2021)

**Q19** How many people were employed in any visitor-related activities in the attraction in 2021, including yourself, working owners, self-employed and/or any volunteers?

*Please enter numbers only, if possible.*

*If there are no people employed in a category, please type 0. If there are people employed but you can't estimate how many, please type Unknown.*

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

## Marketing (2021)

**Q20** Compared with 2020, was expenditure on marketing activities in 2021:

- Up
- Down
- Similar

## Impact of COVID-19 (2021)

**Q21** So that we can fully understand the effect of COVID-19 on attractions, can you tell us whether you are an indoor, outdoor or underground attraction?

*If your attraction is both indoor and outdoor, please select 'both'*

- Indoor
- Outdoor
- Both - indoor and outdoor
- Underground

**Q22** At what percentage of your normal capacity level were you operating at, on average, when open during 2021?

- Open at full capacity
- 90 – 99%
- 80 – 89%
- 70 – 79%
- 60 – 69%
- 50 – 59%
- 40 – 49%
- 30 – 39%
- 20 – 29%
- 10 – 19%
- Less than 10%

## Final comments

**Q23** Do you have any further comments you would like to add?

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## Contact details

**Q24** Please provide your contact details in case we have any queries, and so that Visit Wales have up to date contact details for the same survey in 2023.

First and last name

Phone number

Email address

## Follow-up interviews

**Q25** We will be conducting follow-up interviews with some attractions. This helps us put some of the statistical findings into context.

**Would you be happy to take part in a follow-up interview?**

*This would last approximately 20 minutes, but we would arrange a convenient time with you beforehand by email.*

- Yes
- No

**Please now click on the tick below to submit your response.**

## Appendix II: Visit Numbers 2017 - 2020

Name	2018	2019	2020	2021
Aberconwy House	21,682	20,884	289	Closed
Aberdulais Tin Works and Waterfall	28,478	26,214	629	Closed
Aberglasney Gardens		40,000	16,000	41,500
Aberystwyth School of Art Museum and Galleries	9,000	35,000	3,500	500
Afan Argoed Forest Park	193,997	196,977	106,228	117,279
Airworld Aviation Museum	6,725	9,758	790	6,033
Alpaca my Boots				3,000
Alyn Waters Country Park	83,285	258,764	258,764	239,289
Amelia Trust Farm		20,000		20,000
Amgueddfa Syr Henry Jones	348			40
Amgueddfa'r Mor Porthmadog Maritime Museum		6,766		4,521
Ancre Hill Vineyard		4,000		476
Andrew Logan Museum of Sculpture	942	320		3,000
Anglesey Model Village		17,576	4,292	8,656
Arthog Bog				500
Bardsey Island				3,269
Barry Island Pleasure Park				1,250,000
Beaumaris Castle	98,827	81,588	15,965	99,018
Beaumaris Gaol & Court				70,000
Big Pit National Coal Museum	146,791	140,466	16,943	27,792
Blaenavon Community Heritage & Cordell Museum	35,500	14,119	2,822	252
Blaenavon Ironworks	35,500	14,119	2,822	9,389
Blaenavon World Heritage Centre	40,470	41,489	1,058	17,070
Bodnant Garden	260,153	271,339	106,728	239,790
Bodrhyddan Hall	3,600	1,756		1,293
Brechfa Forest	9,278	11,827	6,672	7,412
Brecon Mountain Railway	74,770			25,000
Brynmawr & District Museum		3,500		225
Cadair Idris National Nature Reserve	34,394	39,005	28,210	46,495
Cadeirlan Deiniol Sant my Mangor   Saint Deiniol in Bangor				2,000
Cae Dai Trust Museum				3,161
Cae Hir Gardens		2,928		3,500
Caerau Gardens	2,000	6,000	2,500	2,500
Caerleon Roman Baths	56,332	38,631	2,261	Closed
Caernarfon Castle	205,009	199,074	25,321	76,273
Caerphilly Castle	108,315	96,628	17,871	49,451
Caldey Island				60,000

Name	2018	2019	2020	2021
Cambrian Heritage Railways (Oswestry)				Closed
Canolfan Hywel Dda		1,000		70
Canolfan Rhiannon	8,000	9,500	3,000	2,000
Canolfan Y Plase		1,840		Closed
Cardiff Bay Cruises (Cardiff Waterbus)		77,828		19,955
Cardiff Boat Tours Ltd - Princess Katharine + Singfly		78,000	5,500	32,311
Cardiff Castle	452,007	502,224	195,930	372,606
Cardiff Open Top Tours	34,980	37,000	10,000	16,228
Cardigan Bay Marine Wildlife Centre		16,898	109	9,239
Cardigan Island Coastal Farm Park				32,000
Carew Castle & Tidal Mill	47,221	42,937	12,576	45,000
Carmarthenshire Museum	9,669	10,441	525	Closed
Castell Aberteifi / Cardigan Castle				21,500
Castell Coch	50,511	58,937	8,610	23,095
Castell Henllys Iron Age Village		17,421	5,482	13,601
Cefn Coed Colliery Museum		10500	0	Closed
Centre for Alternative Technology				14,013
Ceredigion Museum	69,553	110,000	2,800	7,956
Ceunant Llenyrch National Nature Reserve	11,019	13,274	9,873	18,676
Chapel Bay Fort & Museum		1,505		Closed
Chepstow Castle	56,261	58,901	14,982	44,688
Chepstow Museum	56,261	58,901	14,982	5,637
Chirk Castle and Garden	171,943	185,480	57,262	102,263
Cilgerran Castle	14,884	24,273		Closed
Clerkenhill Adventure Farm and Frizbee Golf	18,000	17,000	10,000	20,000
Cloverlands Model Car Museum		1,000	6	150
Clydach Ironworks				Closed
Coed Cerrig-y-Gleisiad National Nature Reserve	8,257	7,909	4,885	6,140
Coed y Brenin Forest Park	137,714	142,360	88,561	113,946
Coedydd Aber National Nature Reserve	65,602	72,252	53,517	66,033
Colby Woodland Garden	93,617	50,927	1,668	53,955
Coles			200	40
Constitution Hill Ltd trading as Aberystwyth Cliff Railway	80,000	85,000	40,000	64,381
Conwy Castle	201,961	212,364	35,553	152,281
Conwy Suspension Bridge	18,717	17,324	190	Closed
Copper Kingdom, Amlwch	5,800	5,162		3,000
Corris Railway		5,066		6,238
Cosmeston Lakes Country Park	250,000	250,000	150,000	275,000
Cosmeston Medieval Village	3,678	3,818	1,367	1,490

Name	2018	2019	2020	2021
Court Cupboard Gallery (Black Mountain Circle Ltd)	2,966			2,181
Craig-y-Nos Country Park		254,666	88,337	93,350
Criccieth Castle	47,411	46,083	4,709	31,527
Cwm Rhaeadr	3,841	3,634	970	4,697
Cwm Weeg Gardens	400	425	100	278
Cwmcarn Forest	182,946	194,997	172,495	234,177
Cwmduad / Nant Gronw	3,796	2,691	1,784	2,156
Cwrw Llyn Cyf	5,000	1,000	1,000	Closed
Cyfarthfa Castle Museum and Art Gallery	62,593	56,311	9,537	11,480
Cynon Valley Museum Trust	18,100	17,779	4,321	2,110
Da Mhile		500	100	2,647
Dan-Yr-Ogof, the National Showcaves Centre for Wales	88,162	85,000	20,000	63,198
Dare Valley Country Park				117,070
Denbigh Castle	10,623	9,766	8,921	9,282
Devil's Bridge Falls		59,164	28,750	58,000
Dinas Rock	48,387	51,528	29,139	56,774
Dinosaur Park (The)		60,000	42,000	124,000
Dolaucothi Gold Mines	23,887	23,349		4,129
Duffryn Sheep Walking				800
Dyfed Shire Horse Farm	10,000	11,000	7,000	10,000
Dyffryn Fernant Garden		4,600	1,000	4,309
Dyffryn Gardens	141,261	167,389	79,723	115,381
Dyfi Forest (incl Tan-y-Coed and Pen-y-Bryn)	44,539	50,222	37,453	53,653
Dyfi Wildlife Centre		12,000		20,000
Dylan Thomas Birthplace				750
Dylan Thomas Boathouse	29,182	25,000	960	Closed
Dylan Thomas Centre		110,872	17,515	Closed
Egypt Centre - Museum of Egyptian Antiquities	22,143			3,845
Elan Valley	202,418	210,259	109,913	163,582
Erddig	172,948	176,874	67,208	11,000
Fairbourne and Barmouth Steam Railway		22,000	11,000	20,000
Falconry Experience Wales		60,000		750
Fantasy farm Park		12,500		6,300
Ffestiniog and Welsh Highland Railways		186,205		123,828
Ffin Y Parc Gallery				28,000
Ffotogallery				14,522
Firing Line Museum of The Queen's Dragoon Guards and The Royal Welsh	124,004	117,405	20,000	51,663
Folly Farm	455,428	438,234	203,073	348,689
Folly Tower (Pontypool)				Closed

Name	2018	2019	2020	2021
Fonmon Castle			29,345	53,000
Fourteen Locks Canal Centre	60,152	65,253	19,774	10,786
Garwnant Forest	92,587	98,230	64,986	91,660
Glynn Vivian Art Gallery		54,141	9,563	12,504
Golden Grove and Gelli Aur Country Park		10,000	8,500	22,500
Good Day Out				600
Gower Brewery Company Ltd				Closed
Gower Heritage Centre		58,516	16,221	20,000
Great Orme Country Park Visitor Centre	210,008			Closed
Great Orme Mines		31,576	13,176	27,677
Great Orme Tramway	191,613	190,227		105,000
Greenfield Valley Heritage Park	13,000	17,565	8,167	18,000
Greenmeadow Community Farm				28,952
Gregynog Hall	1,800	3,500		3,860
Gwinllan Conwy Ltd		6,500		928
Gwrych Castle				103,358
Gwydir Forest Park	352,723	371,655	280,383	408,511
Halen Mon - Anglesey Sea Salt Co		29,130	284	Closed
Harbwr Tenby Harbour Brewery				Closed
Harlech Beach National Nature Reserve	134,914	139,075	116,618	175,550
Harlech Castle	108,981	103,246	15,378	90,130
Heatherton Country Sports Park				210,000
High Glanau Manor Gardens		1,226		1,000
Holyhead Maritime Museum	4,861	5,167		1,700
Horse Drawn Boat Centre (The)		68,000		26,000
Inigo Jones Slate Works	38,000	15,760	10,000	9,010
Internal Fire Museum of Power				Closed
Joseph Parry's Ironworker's Cottage	441	754		Closed
Kidwelly Castle	34,519	29,849	3,185	24,906
Kymin (The)	5,789	6,244		Closed
Lampeter Town Museum	848	3,000		Closed
Laugharne Castle	14,619	15,396	3,460	17,092
LC Swansea	772,000	678,714	185,312	285,047
Llandegfedd	188,720	285,029	180,779	201,868
Llanelli Wetland Centre	68,460			45,000
Llanerchaeron	48,354	52,716	8,233	30,068
Llanfair Slate Caverns & Farm Park	24,000	22,500	4,500	31,000
Llangollen Motor Museum		5,000	80	Closed
Llangollen Museum		22,637	2,619	3,000
Llanidloes Museum and Library				3,393

Name	2018	2019	2020	2021
Llantarnam Grange Arts Centre		34,450	13,796	18,480
Llantrisant Guildhall		3,000	2,000	3,521
Llanvihangel Court				Closed
Llanymynech Wharf Visitor Centre				400
Llanyrafon Mill	364	180	50	175
Llyn Alwen and Llyn Brenig	124,256	107,351	78,530	107,272
Llyn Brenig Visitor Centre	144,180	145,987	86,311	128,122
Llynonn Mill				1,000
Llys Y Fran				81,834
Maesfron Hall and Gardens		1,500	100	550
Manor House Wildlife Park	76,517			95,231
Manorbier Castle		19,000	8,978	17,000
Margam Country Park				305,678
Merthyr Mawr Warren National Nature Reserve	71,317	69,930	62,772	72,716
Mid Wales Arts		11,000	5,000	8,800
Minera Lead Mines				Closed
Moel Famau Forest	86,086	96,550	82,394	72,402
Mold Library Museum and Art Gallery		15,000	500	200
MOMA Machynlleth	22,986	22,690	3,908	2,922
Monmouth Museum				Closed
Morfa Dyffryn National Nature Reserve	77,303	63,260	37,304	64,084
Museum of Cardiff, Old Library, The Hayes, Cardiff		88,473	37,865	3,250
Nant yr Arian	111,826	114,382	79,778	111,206
Narberth Museum		2,600		1,150
National Cycle Collection		3,000	2,000	1,800
National Museum Cardiff	488,809	584,256	130,563	135,725
National Roman Legion Museum	54,264	21,712	12,562	10,720
National Slate Museum	141,762	152,903	19,715	71,686
National Trust Stackpole / Stackpole Nature Reserve	298,496	256,746	129,753	390,498
National Waterfront Museum Swansea	285,340	275,242	52,672	41,427
National Wool Museum	31,383	31,108	4,430	7,546
Newborough National Nature Reserve & Forest	478,204	485,533	342,676	559,939
Newport Medieval Ship Project		3,500		263
Newport Museum and Art Gallery	31,902			5,902
Newport Wetlands Environmental Education and Visitor Centre	89,516	112,277	75,213	56,979
Newport Wetlands Nature Reserve	89,516	91,774	76,192	82,207
Newton House & Dinefwr Park	82,370	87,249	8,467	78,570
Newtown Textile Museum	1,422	1,273	205	748
Norwood Gardens and Tearooms				500

Name	2018	2019	2020	2021
Nova	250,000	150,000		200,000
Ocean Lab	4,436	5,263	1,281	2,733
Offa's Dyke Centre				720
Old Market Hall / Llanidloes				Closed
Oriel Davies Gallery				20,094
Oriel Mon	81,812	71,173	15,413	37,816
Oriel Mostyn Gallery		63,877	19,066	18,898
Oxwich Castle	40,470	5,932		Closed
Oxwich National Nature Reserve	12,391	11,506	10,495	12,948
Parc Bryn Bach		182,000	52,500	185,972
Parc Gwledig Morglawdd Caergybi / Holyhead Breakwater Country Park				100,000
Parc Howard Museum	10,568	14,778	1,310	Closed
Parc Slip Nature Reserve & Visitor Centre		80,000		20,000
Parva Farm Vineyard		5,000	4,000	4,000
Pembrey Country Park	520,000	611,114	405,444	804,513
Pembroke Dock Heritage Centre	8,396	7,982	1,948	3,190
Pembrokeshire Candle Centre & Museum		4,000	2,000	200
Pembrokeshire Llamas				1,000
Penderyn Distillery (The Welsh Whisky Company)		42,228	19,953	20,647
Penrhyn Castle	118,833	134,896	7,793	79,491
Picton Castle Gardens	38,680			55,393
Pierhead		112,365	13,287	Closed
Piggery Pottery				12,000
Plantasia Tropical Zoo		77,509	49,183	57,783
Plas Cadnant Hidden Gardens		22,435	11,000	25,464
Plas llanelly house				150
Plas Mawr	31,561	35,356	4,236	10,271
Plas Newydd	151,714	155,976	12,000	104,998
Plas yn Rhiw	20,519	23,211	102	10,760
Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	342,620	410,041	275,336	285,411
Pontypool & Blaenavon Railway				16,333
Pontypridd Museum	22,195	24,913	1,175	Closed
Porth y Swnt	13,428	12,657	489	1,000
Portmeirion		245,690	128,596	285,191
Powis Castle and Garden	155,805	184,437	4,031	120,318
Principality Stadium Tours	48,337			5,578
Quarry Pottery				50,000
Radnorshire Museum				1,391
Raglan Castle	64,475	66,751	16,248	48,669

Name	2018	2019	2020	2021
Rheilffordd Llyn Padarn / Llanberis Lake Railway		76,741		51,000
Rheilffordd Llyn Tegid / Bala Lake Railway	33,000	33,000	13,000	31,531
Rhiw Valley Light Railway	500	450		Closed
Rhondda Heritage Park	44,970			34,596
Rhuddlan Castle	22,784	20,328	1,264	18,670
Rhyl Miniature Railway				30,000
Rhymney Brewery Visitor Centre		3,600	200	Closed
RibRide	15,861	21,299	7,779	16,000
Royal Cambrian Academy of Art		30,000		7,000
Royal Welch Fusiliers Museum		149,213	12,583	61,523
RSPB Conwy nature reserve	79,850	78,950	30,743	39,490
RSPB Ynys-hir	15,901	15,812	5,685	9,733
Rug Chapel	3,600	1,260		Closed
Seaquarium of Rhyl		61,367	29,463	55,429
Senedd		76,821	12,326	6,463
Snowdon Mountain Railway	140,000	143,865	29,194	98,567
South Stack Cliffs Nature Reserve	117,989			87,955
South stack Ynys Lawd lighthouse		20,000		3,000
St Asaph Cathedral		4,318	188	1,009
St David's Bishop Palace	25,412	21,342	2,806	19,267
St Donats Art centre				Closed
St Fagans National Museum of History	636,859	746,105	112,379	221,758
St. Mary's Priory and Tithe Barn		10,000		1,280
Storiol Gwynedd		6,000		10,500
Swansea Museum		100,371	661	15,192
Swtan Heritage Museum		1,500		800
Talacre	142,393	141,198	142,031	181,726
Talgarth Mill				300
Tal-y-Llyn Heritage Centre				12
Talyllyn Railway		49,344	12,855	21,000
Tanat Valley Light Railway		4,000		Closed
Techniquest	153,500	164,000	27,500	63,155
Tenby Museum and Art Gallery		15,630	3,000	2,300
The Castle and Regimental Museum, Monmouth	4,861	4,407		2,197
The Ebbw Vale Works Museum	632			Closed
The Gate	27,222	27,219	5,275	8,327
The Gwili Railway		31,000	164	17,000
The Judge's Lodging				3,329
The Magic of Life Butterfly House		12,903	6,028	12,108
The Meadows Farm Village				55,000



Name	2018	2019	2020	2021
The National Coracle Centre		2,115		1,245
The Regimental Museum of The Royal Welsh	10,217	8,147	3,291	6,000
The Royal Mint Experience	75,000	82,714	20,434	25,104
The Secret Owl Garden	20,000			Closed
The Spaceguard Centre		2,419	259	850
The Vale of Rheidol Railway Ltd	60,000	53,972	860	42,690
Thomas Shop & Museum (The)	2,500	3,000	1,300	50
Timescape Rhayader Amserwedd Rhaeadr Qwy - Formally Rhayader Museum				Closed
Tintern Abbey	74,613	71,105	12,312	47,137
Tir Prince Fun Park	900,000	1,000,000		1,000,000
Tomos Watkin (The Hurns Brewery)				Closed
Treborth Botanic Garden, North Wales				35,000
Tredeggar House	80,457	89,529	2,556	43,215
Tregaron (Cors Caron) National Nature Reserve	42,131	43,238	36,224	47,703
Tregaron Heritage Centre (previously Canolfan y Barcud - Kite Centre)				50
Tretower Court & Castle	13,274	12,452	1,427	9,541
Tudor Merchant's House	25,066	27,414	796	1,341
Tŷ Mawr Country Park				145,921
Tŷ Mawr Wybrnant	3,794	3,125		Closed
University of South Wales Art Collection Museum	2,100			Closed
Upton Castle Gardens		1,800		2,500
Usk Castle		6,754	203	2,000
Valle Crucis Abbey	5,690	5,735		4,085
Van Road Caerphilly	17,132	16,200	20,839	17,251
Veddw Garden				600
Wales Ape and Monkey Sanctuary		30,457	13,000	21,032
Wales Millennium Centre	1,762,281	1,142,706	203,552	92,499
Walkers on Snowdon	557,991	587,864	329,271	544,489
Walnut Tree Farm Park				7,000
Welsh Crannog Centre (The)				12,000
Welsh Hawking Centre & Wildlife Park				Closed
Welsh Royal Crystal		3,000	300	500
Wepre Country Park				400,000
West Wales Arts Centre		30,000	5,000	8,000
White Castle Vineyard	1,000	2,600	1,000	1,400
Wildlife Seawatch		43,000		10,000
Winding House				Closed
Wings of Wales				200
Wireless in Wales / Gwefr heb Wifrau		200	10	14

Name	2018	2019	2020	2021
Wolfscastle Pottery				2,000
Workhouse History Centre	2,400	3,000	300	1,000
Wrexham County Borough Museum and Archives	34,412	28,955	7,905	8,760
Xplore!				24,000
Y Gaer Museum, Art Gallery and Library				22,236
Y Lanfa Powysland Museum and Welshpool Library		1,476	14	850
Ynyslas National Nature Reserve	70,855	126,111	95,964	132,691
Zip World Forest	195,000	223,500	121,035	180,225
Zip World Llechwedd Slate Caverns	195,000	179,000	46,000	160,255
Zip World Penrhyn Quarry	122,000	145,000	80,600	142,889
Zip World Tower				54,916

## Appendix III: Top ten attractions by region

### Top ten attractions in Mid Wales

Name	Paid / Free	Owner	Category	No. of visits
1 Elan Valley	Free	DCWW	WL	163,582
2 Ynyslas National Nature Reserve	Free	NRW	WL	132,691*
3 Powis Castle and Garden	Paid	NT	HP	120,318
4 Nant yr Arian	Free	NRW	WL	111,206*
5 Constitution Hill Ltd trading as Aberystwyth Cliff Railway	Paid	PO	R/T	64,381
6 Devil's Bridge Falls	Paid	PO	CP	58,000*
7 Dyfi Forest	Free	NRW	WL	53,653*
8 Quarry Pottery	Free	PO	IND	50,000*
9 Tregaron (Cors Caron) National Nature Reserve	Free	NRW	WL	47,703*
10 The Vale of Rheidol Railway Ltd	Paid	PO	R/T	42,690

### Top ten attractions in North Wales

Name	Paid / Free	Category	Owner	No. of visits
1 Tir Prince Fun Park	Free	PO	Theme	1,000,000*
2 Newborough National Nature Reserve & Forest	Free	NRW	WL	559,939*
3 Walkers on Snowdon	Free	LA/NP	WL	544,489*
4 Gwydir Forest Park	Free	NRW	WL	408,511*
5 Wepre Country Park	Free	LA/NP	CP	400,000*
6 Pontcysyllte Aqueduct & Trevor Basin Visitor Centre	Free	PO	HP	285,411*
7 Portmeirion	Paid	PO	HP	285,191
8 Bodnant Garden	Paid	NT	CP	239,790
9 Alyn Waters Country Park	Free	LA/NP	CP	239,289*
10 Nova	Paid	LA/NP	Theme	200,000*

### Top ten attractions in South East Wales

Name	Paid / Free	Category	Owner	No. of visits
1 Barry Island Pleasure Park	Free	PO	Theme	1,250,000*
2 Cardiff Castle	Paid	LA/NP	HP	372,606
3 Cosmeston Lakes Country Park	Free	LA/NP	CP	275,000*
4 Cwmcarn Forest	Free	NRW	WL	234,177*
5 St Fagans National Museum of History	Free	AC-NMW	MAG	221,758
6 Llandegfedd	Free	DCWW	WL	201,868
7 Parc Bryn Bach	Free	PO	A/A	185,972*
8 National Museum Cardiff	Free	AC-NMW	MAG	135,725
9 Dare Valley Country Park	Free	LA/NP	CP	117,070*
10 Dyffryn Gardens	Paid	NT	CP	115,381

### Top ten attractions in South West Wales

Name	Paid / Free	Category	Owner	No. of visits
1 Pembrey Country Park	Free	LA/NP	CP	804,513
2 National Trust Stackpole / Stackpole Nature Reserve	Free	NT	WL	390,498*
3 Folly Farm	Paid	PO	Farm	348,689
4 Margam Country Park	Free	PO	CP	305,678
5 LC Swansea	Paid	PO	Theme	285,047*
6 Heatherton Country Sports Park	Free	PO	A/A	210,000*
7 Dinosaur Park (The)	Paid	PO	A/A	124,000*
8 Afan Argoed Forest Park	Free	NRW	WL	117,279*
9 Manor House Wildlife Park	Paid	PO	Farm	95,231
10 Llys Y Fran	Free	DCWW	WL	81,834