VisitEngland

Visitor Attraction Trends in England 2012

Summary Report

VisitEngland

Acknowledgements

VisitEngland would like to thank all representatives and operators in the attraction sector who provided information for the national survey on which this report is based. For a number of attractions, data has been included with kind permission of ALVA (Association of Leading Visitor Attractions), English Heritage, The National Trust, Birmingham Museums Trust, Canal & River Trust, Go Ape, Liverpool Museums as well as several Destination Management Organisations. Where relevant this has been referenced in the report.

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August 2013

ENGLISH HERITAGE

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Introduction

This report presents the findings of the Survey of Visits to Visitor Attractions undertaken in England by VisitEngland. The report provides a comprehensive England-wide analysis of trends plus visits data for individual attractions.

Objectives

To monitor trends in the visitor attraction sector in England and to improve understanding of the dynamics of the sector. Findings contribute to estimates of the economic impact of tourism and inform development and planning work. Results allow operators to benchmark their operation within their category, within their region and across the sector as a whole.

Survey Method

Attractions have the option of either online or postal survey completion.

All attractions for whom email contacts are held are sent an email invitation with a link to their attraction's online questionnaire. Attractions not responding are subsequently sent a postal questionnaire alongside attractions with no or only generic email contacts.

A copy of the questionnaire is appended.

BDRC Continental holds the contract for the survey in England and is responsible for the preparation of this report.

It is important to highlight that major individual attractions can have a significant impact upon the proportion of visits within each region and attraction category. Their participation or non-participation in the survey year-on-year can result in significant fluctuations in the data within each region and attraction category.

Visitor Attraction Definition

"…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 and can include places of worship (but excludes small parish churches); 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."

Sample and Response

Response by attraction category

Category	Number of attractions that provided data
Country Parks	43
Farms	38
Gardens	85
Historic properties	440
Leisure / theme parks	25
Museums / art galleries	511
Steam / heritage railways	27
Visitor / heritage centres	78
Wildlife attractions / zoos	78
Workplaces	27
Places of worship	58
Other	101
Total	**1,511**

5,195 English visitor attractions were invited to take part in the 2012 survey.

1,511 English visitor attractions provided visits figures for the year 2012.

- 988 completed online
- 235 completed by post
- 288 provided data through umbrella organisations

1,456 attractions provided admissions for both 2012 and 2011 and these attractions form the basis of this report's trend evaluation.

A review of the sample used for the Survey of Visits to Visitor Attractions was undertaken prior to fieldwork this year. Please see the full report for details.

Headlines (1)

There was continued instability in the UK economy in 2012, with Gross Domestic Product in decline for three quarters of 2012, and the Olympics also having an unsettling effect for some attractions.

The weather was characterised by a fairly warm, dry Spring followed by one of the wettest summers on record, with above average rainfall continuing for the rest of the year.

Overall there was a **-1% annual decline in total visits to attractions in 2012.**

Sectors with high numbers of outdoor attractions and paid attractions found 2012 particularly challenging, but only two sectors (museums & galleries and workplaces) were able to buck this trend and grow visitor numbers.

Free sites fared much better than paid, growing visitor numbers by +2% vs. a decline of -3%. The largest attractions (with 200,000 visitors) also managed to increase admissions (by +1%), helped by growth of the overseas market.

Adult entry charges to paid attractions increased by +4% in 2012, with child charges increasing by +3%. This helped to offset the impact of a drop in visitor numbers, enabling sites to grow **gross revenue by +1% overall.** However, the revenue increase was driven by just a quarter of attractions, and there were more sites reporting a decrease (36%) than an increase (27%) in revenue in 2012.

Over the past eight years, the proportion of attractions making additional marketing investments has been in gradual decline. There are now nearly as many attractions decreasing their marketing expenditure as there are increasing.

Headlines (2)

Two-thirds (67%) of attractions offered some form of digital communications in 2011: Facebook is popular (used by 55%), and Twitter has also taken off in the last year (now employed by 45% of sites).

A wide range of services are offered by attractions in 2012:

- 79% website
- 68% retail shop
- 57% public events
- 56% membership scheme
- 51% café/restaurant
- 44% temporary exhibitions
- 39% play area for children
- 38% venue hire
- 25% corporate events
- 25% online booking
- 18% costumed interpretation

As predicted last year, 2012 has seen a continued increase in unpaid volunteers, with a quarter of sites now employing more volunteers than in 2011, rising to 30% amongst attractions with over 200,000 visitors a year.

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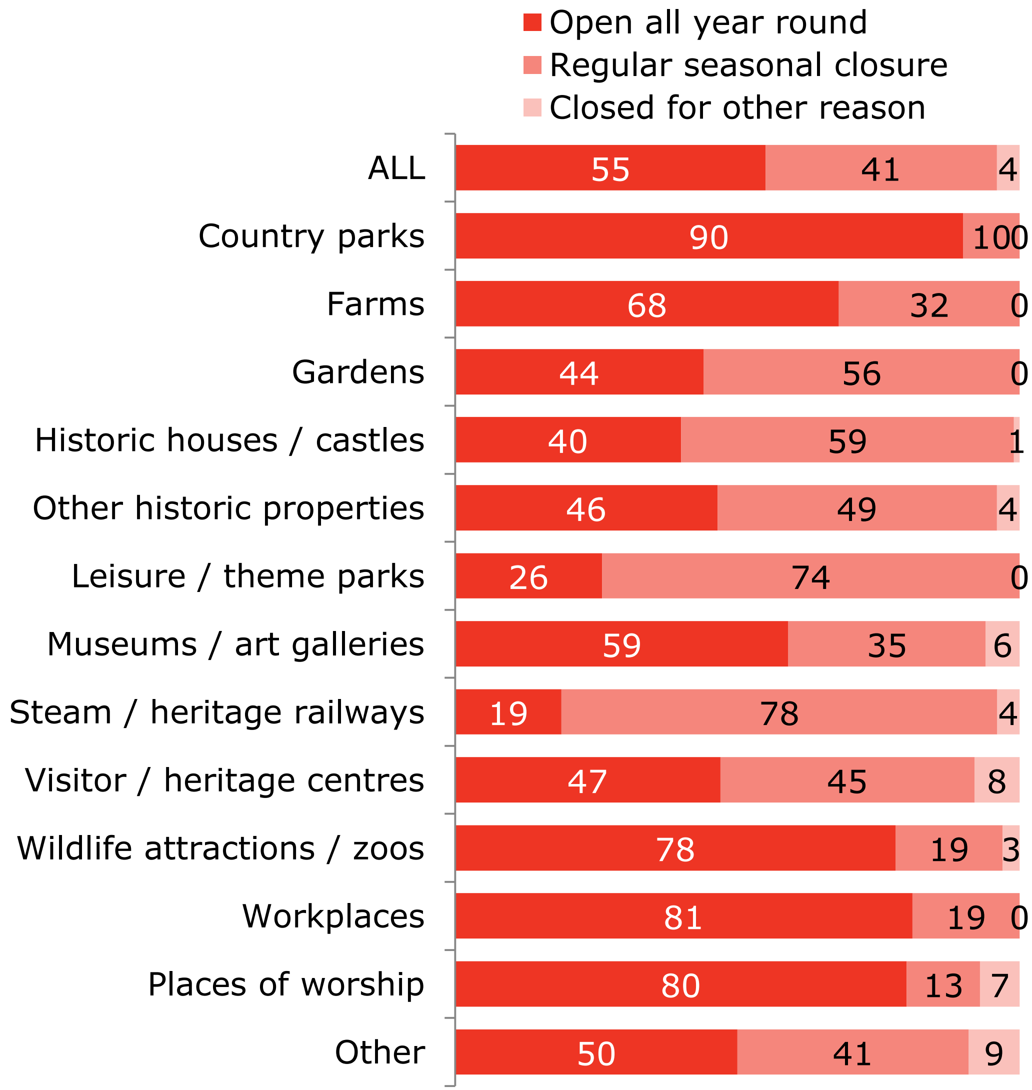
2012 Weather Summary *(source: Met Office)*

The year 2012 began with a relatively dry January to March, but will be remembered as one of the wettest on record, with annual rainfall across England up by 32% compared with the average across 1981 to 2010. Sunshine in England was 3% below average, and mean temperatures broadly on a par at only -0.1ºC lower than average.

Winter 2011/12:	2012 started out relatively dry (14% below average), with below average rainfall in January and February and temperatures 0.8ºC up.
Spring 2012:	This pattern continued into the beginning of Spring, with an uncharacteristically warm, sunny and dry March (with rainfall 59% below average). In marked contrast, April was the wettest on record, with 232% of normal rainfall. May saw a return to a more stable weather pattern.
Summer 2012:	Frequent areas of low pressure over or near the UK resulted in an exceptionally wet summer across most of the country, especially during June and much of July. June was the wettest since 1766 and July had over 182% of normal rainfall. The summer was duller than usual, with 79% of normal sunshine for the UK overall.
Autumn 2012:	The wet weather continued across the whole of Autumn, and temperatures were down by 0.7ºC.

Attraction opening – by attraction category



Little over half of attractions remain open all year round.

Seasonal closure is most common for steam/ heritage railways and leisure/ theme parks, which are largely reliant on holiday trade.

Country parks, workplaces, places of worship and wildlife attractions are the most likely to remain open year round.

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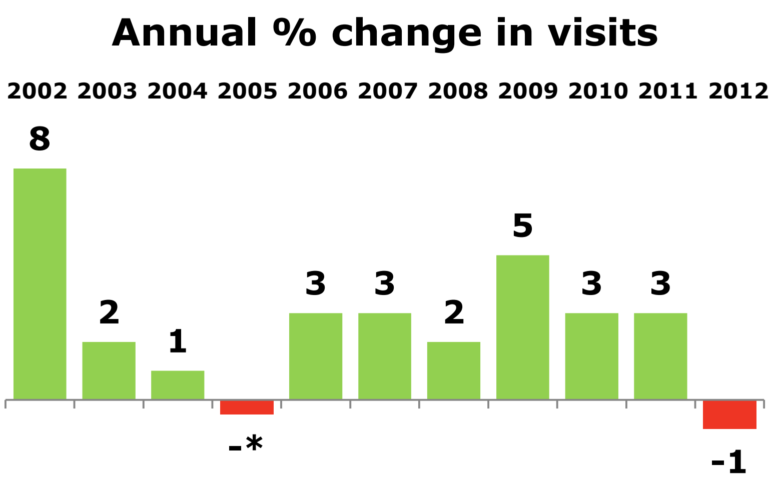
Base: All attractions answering (1,313).

Visitor admission trends



Attractions reported a **1% annual decrease** in total visits in 2012 (adults and children).

This was driven by attractions charging for admission, where there was a 3% decline in visits, contrasting to a 2% increase amongst sites with free entry.

The overall decline was not associated with a reduction in the number of trips taken in England. There was actually an increase in the number of day visits in 2012 (+12%), the number of domestic holiday trips remained consistent with 2011, and there was a +1% uplift in holiday visits to England from abroad (*source: GBTS, Day Visits survey & IPS*).

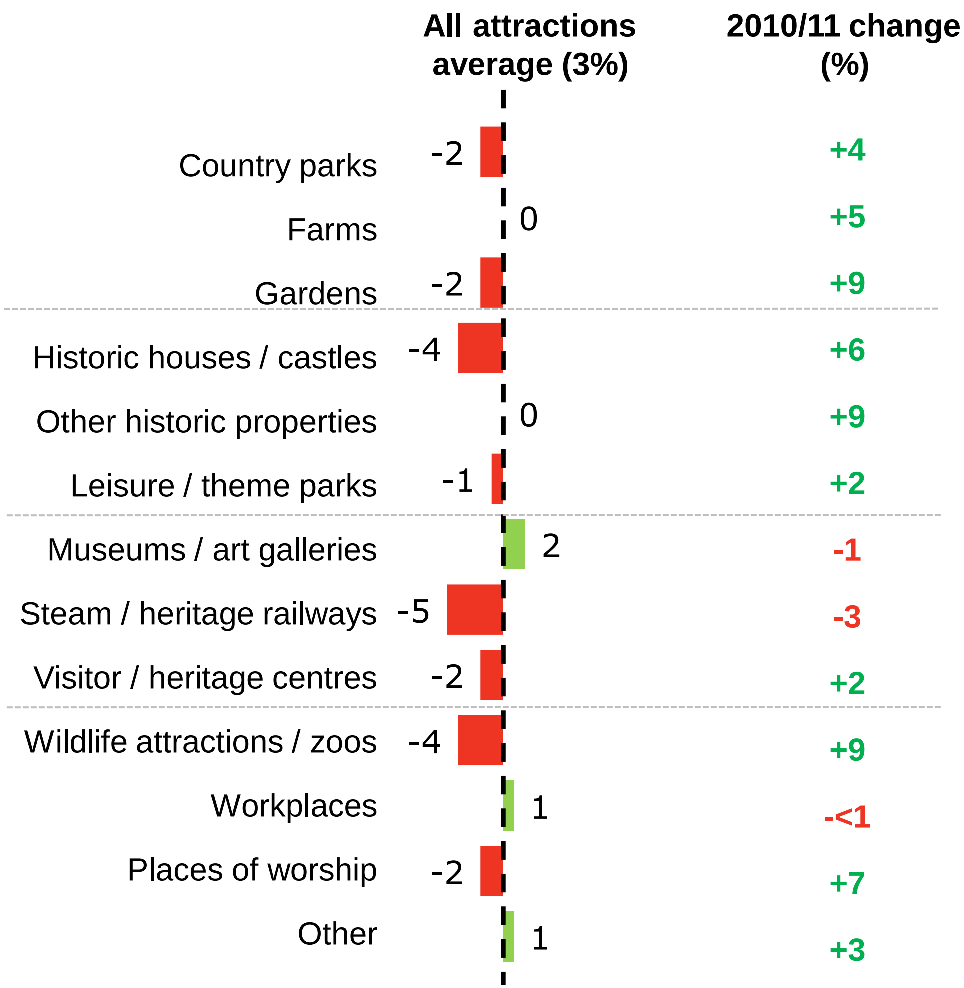
However, the number of nights for English holidays reduced by -1% for domestic travellers and -2% for international visitors (*source: GBTS & IPS*).

The Olympics and Paralympics may have had an unsettling effect on visits to attractions, with many attractions reporting a decline in visitor numbers during the summer months (*source:* Tourism Business Monitor).

VisitEngland™

Base: All attractions providing visits data for current and previous year (1,456 in 2012).

Visitor admission trends 2012 – by attraction category



2012 was a difficult year for attractions across the board, with fortunes reversed for most sectors.

While attractions had benefited from the clement weather in 2011, the exceptional levels of rainfall made 2012 a difficult year. This was especially the case for attractions with a significant outdoor component, such as wildlife attractions and historic houses.

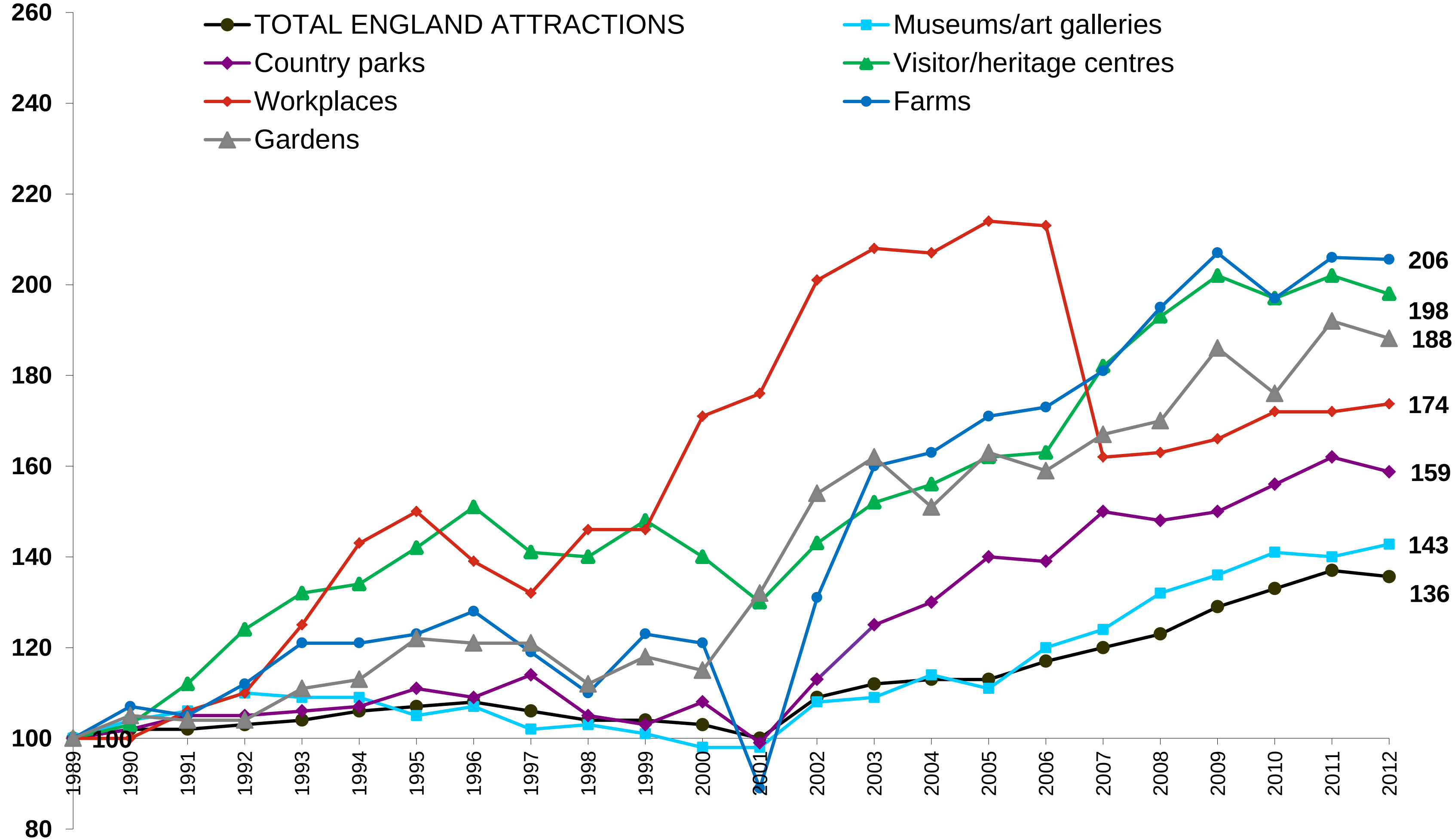
Steam/ heritage railways suffered the worst with 2012 (decline of -5%) further compounding a difficult 2011 (decline of -3%).

Museums / art galleries bucked the trend, picking up some of outdoor attraction business and growing their visitor numbers by 2%.

VisitEngland

Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Index of visits to attractions – sectors outperforming market



VisitEngland

Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Index of visits to attractions – sectors outperforming market

Index Calculation

The charts presented on slides 13 and 15 show the indexed visits trend for each attraction category. The base year for the index is 1989, with the index set at 100 for that year. Annual percentage changes in visits are subsequently applied to this index e.g. visits to museums / art galleries increased +4% between 1989 and 1990, increasing the index for 1990 to 104.

Because the number of attractions responding each year differs, the percentage change between any two years is applied each time to the previous year's index to take account of varying sample sizes each year.

Operators are asked in each survey year to provide the number of visits for both the survey year and previous year. This enables the trend between any two years to be calculated based on the same attractions.

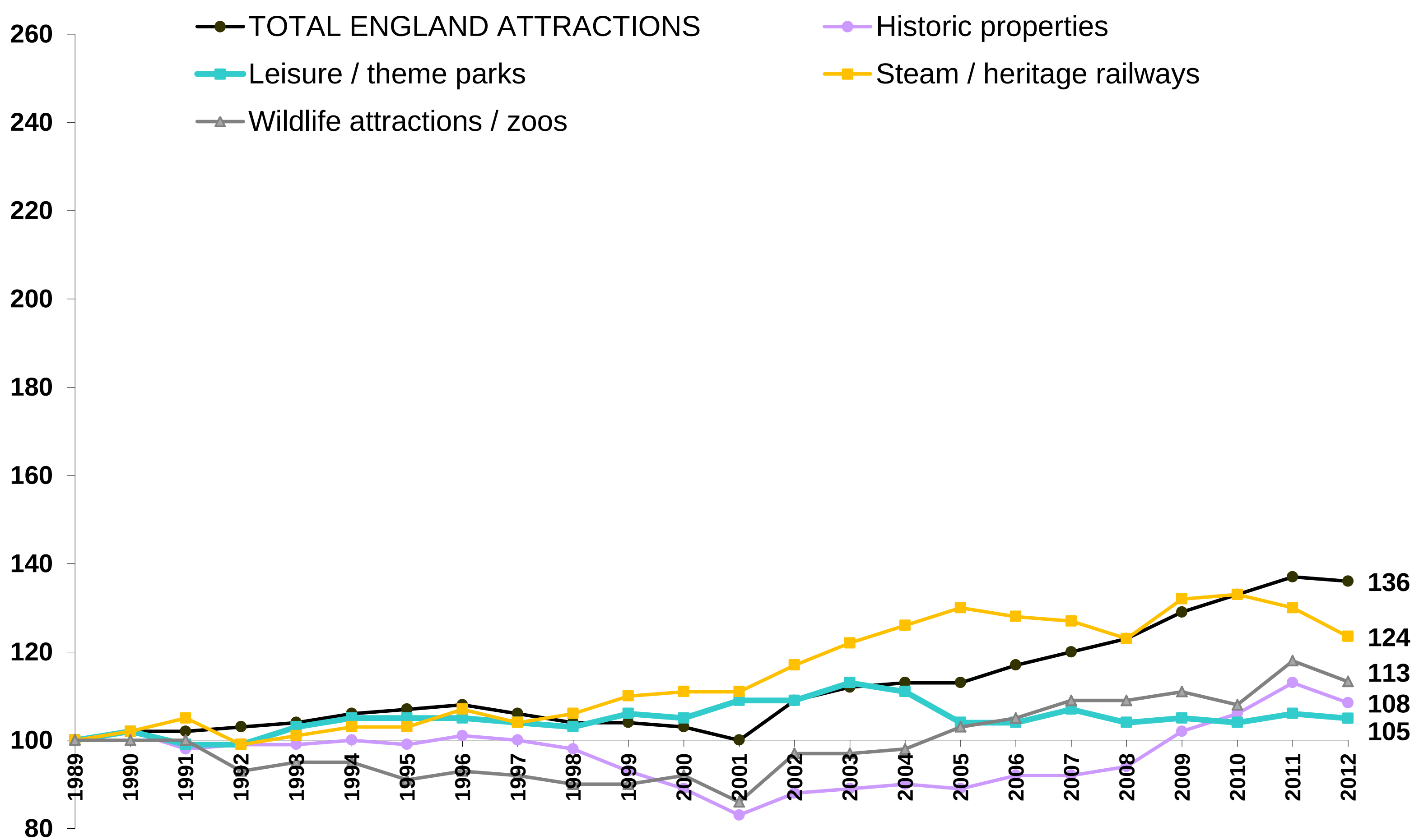
The chart shows the attraction categories which have shown above average annual visit increases since 1989**.** **Across England attractions as a whole, visits have increased 36% in that time.**

Farms have seen the greatest increase in visits, particularly in the last ten years, since the Foot and Mouth outbreak of 2001. Visitor / heritage centres and gardens have also seen very strong increases overall.

The popularity of workplaces saw a sharp drop in mid 2000s, but has seen a steady incline since then, and is one of the few sectors to have increased visitor numbers in 2012.

Visits to museums / art galleries overall are now over 40% higher than they were on the introduction of free entry to national museums in 2001. DCMS data on visits to former charging sponsored museums indicate that this increase has been primarily driven by visits to these museums. These figures state that visits to former charging sponsored London museums were up by +151% in the past ten years and those outside London by +148%.

Index of visits to attractions – sectors under performing against market



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Base: All attractions providing visits data for both 2011 and 2012 (1,456)

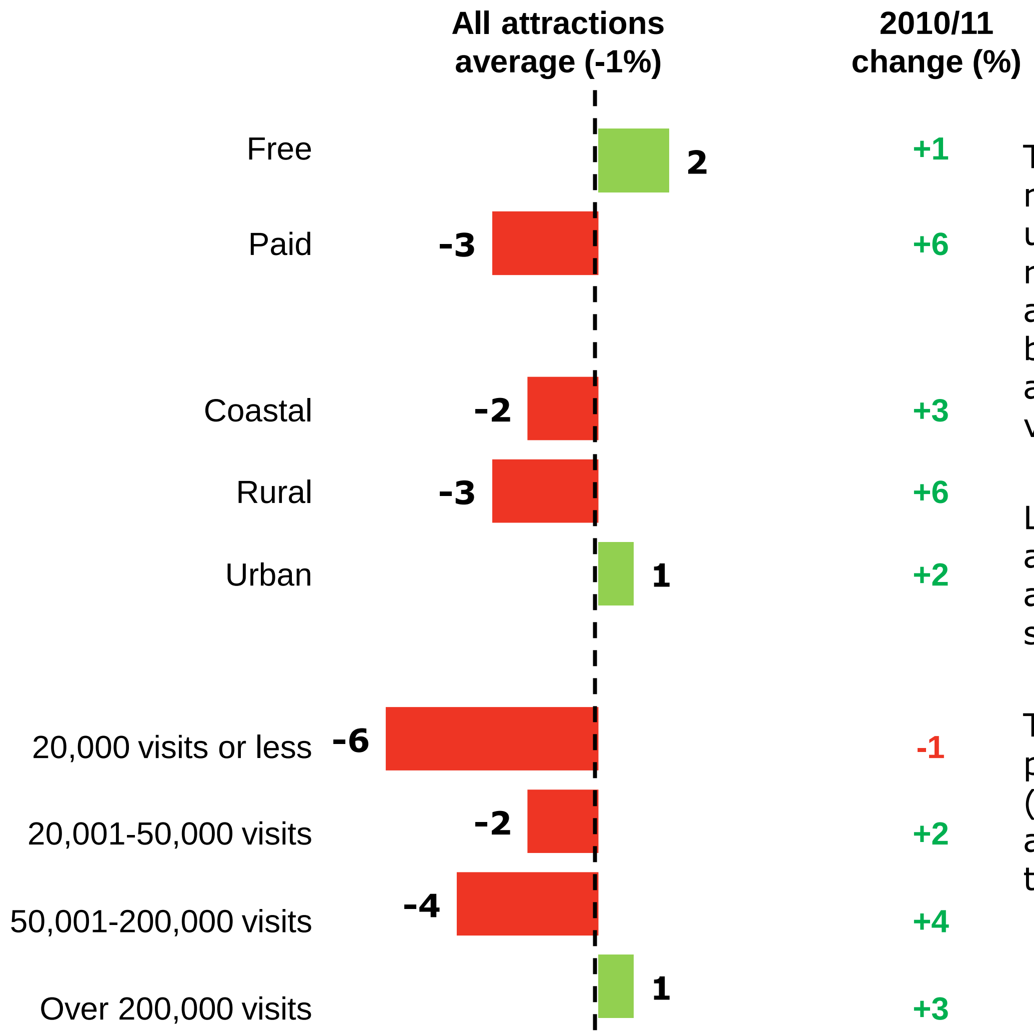
Index of visits to attractions – sectors under performing against market

Steam/ heritage railways, which had been performing above or in line with the industry average until 2010, have seen two years of decline, but remain 24% above the benchmark 1989 levels.

Historic properties and wildlife attractions/ zoos also reported a decline in visitor numbers following steady improvement since 2001. As attractions with a large outdoor component, this is likely to be driven by the wet weather in 2012.

Visits to leisure / theme parks have rather stagnated over the past eight years, although it should be noted that attractions operated by Merlin Entertainments are not included in this survey.

Visitor admission trends 2012 – by admission charge, geographic location and size



There was a slight increase (+1%) in the total number of domestic overnight holiday trips to urban areas in 2012 (*source: GBTS*). This is reflected in the performance of urban based attractions, with the category also no doubt boosted by a higher proportion of indoor attractions, which are more likely to attract visitors in poor weather.

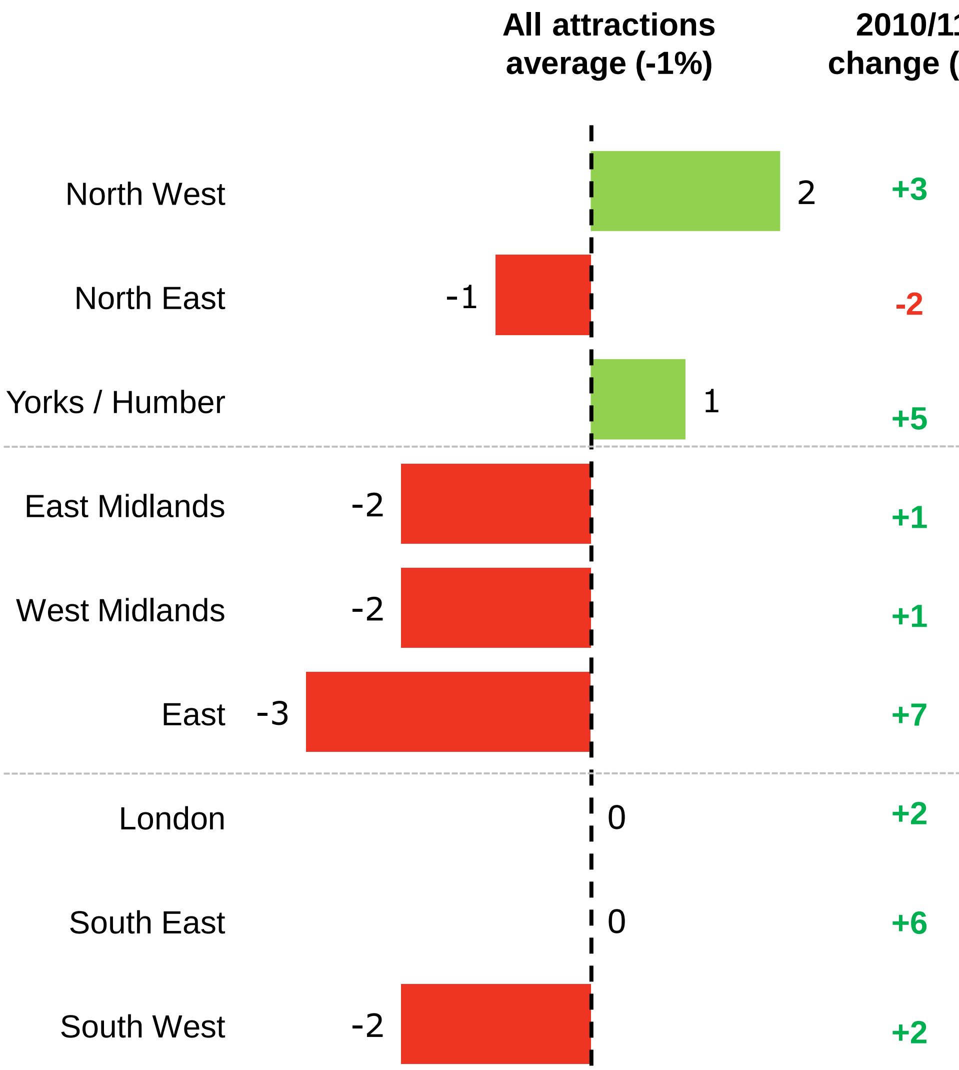
Large attractions with 200,000+ visits per annum have outperformed the market, while attractions with fewer than 20,000 visits have suffered the worst.

This is associated with the stronger performance of urban areas, which house half (49%) of the largest (200,000+ visitors) attractions taking part in the survey, including the free London museums and galleries.

VisitEngland

Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 - by region



Attractions in the North West performed most positively in 2012. This is linked with a higher proportion of urban based attractions in this areas.

London and the SE held steady overall, despite any disruption over the summer resulting from the Olympics and Paralympics.

The greatest declines in visitors were in the more rural Midlands and coastal South West. The decline was most notable in the East of England which performed particularly well during the clement weather in 2011.

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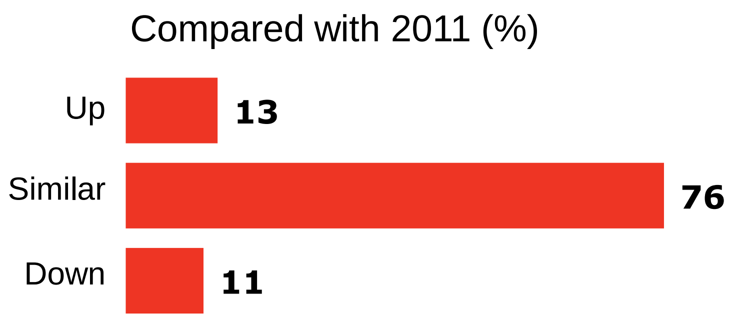
Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – by visitor origin

Overseas visitors

+10%
in visits

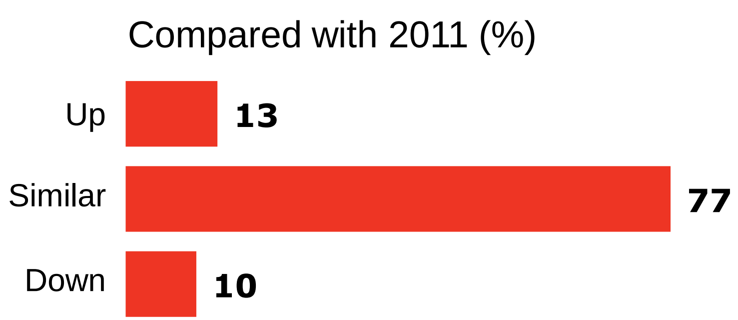


Across the attractions sector, overseas visits were up by 10% in 2012. However, this trend was driven by a small number of the large London sites, and most other areas of the country saw a decline in visits.

Over half (56%) of overseas visits are accounted for by London attractions, with overseas visitors up by +20% here.

Local / day trippers

-5%
in visits



Attractions reported local visitors within day trip distance down by -5% in 2012.

This shift is also driven by London where day trips were down by -7%; The South West also saw a marked decline in local/ day trip visitors (-20%), most likely associated with the poor weather across most of 2012.

Base: All attractions responding (c.1,511)

Adult admission charge trends 2012 – by attraction category

	% increase in adult charge versus 2011	Average 2012 charge	2010/11 change (%)
ALL ATTRACTIONS	4	£7.05	+5
Country parks	0	£5.00	+6
Farms	5	£6.72	+6
Gardens	7	£6.23	+3
Historic houses / castles	5	£6.62	+6
Other historic properties	3	£4.38	+6
Leisure / theme parks	6	£13.88	+6
Museums / art galleries	5	£4.88	+6
Steam / heritage railways	8	£11.13	+6
Visitor / heritage centres	2	£6.00	+7
Wildlife attractions / zoos	3	£9.29	+5
Workplaces	-2	£7.46	+6
Places of worship	9	£8.25	+5
Other	1	£15.11	+3

Leisure/ theme parks (£13.88), steam/ heritage railways (£11.13) and wildlife attractions/ zoos (£9.29) have the highest average admission prices, which may explain their below market performance in growth in visitor numbers.

The average increase in **adult admission fees** is 4% this year – consistent with increases during the previous four years, with increases of 5% (2011), 5% (2010), 4% (2009) and 5% (2008).

This is above the rate of inflation, as the Consumer Price Index ran at an average of 2.7% for 2012, while the Retail Prices Index was 3.1%.

Increases were highest at places of worship (9%) and steam/ heritage railways (8%).

Average **child admission charges** increased by an average of 3% in 2012.

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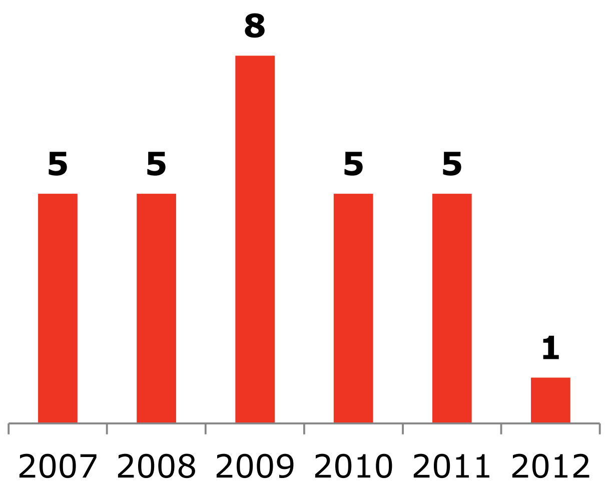
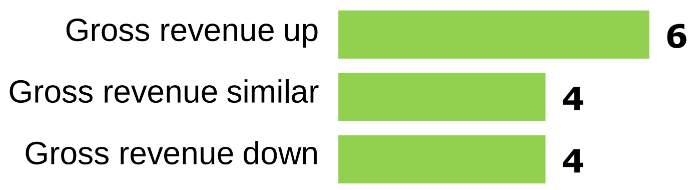
Base: Attractions providing admission charge data for both 2011and 2012 (904)

Gross revenue trend

% change in gross revenue



% change adult admission charges



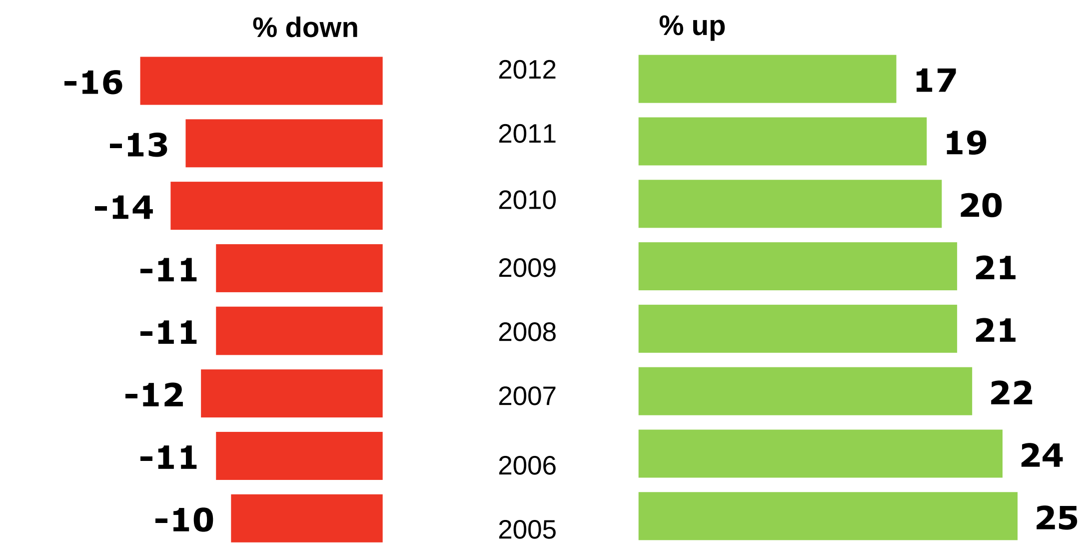
Gross revenue overall remained fairly consistent with 2011, being limited to +1% growth.

More attractions actually reported a decrease (36%) than an increase (27%) in revenue in 2012.

Revenue is correlated with change in adult admission prices, with larger price increases generating more revenue.

Base: All attractions responding (1,047)

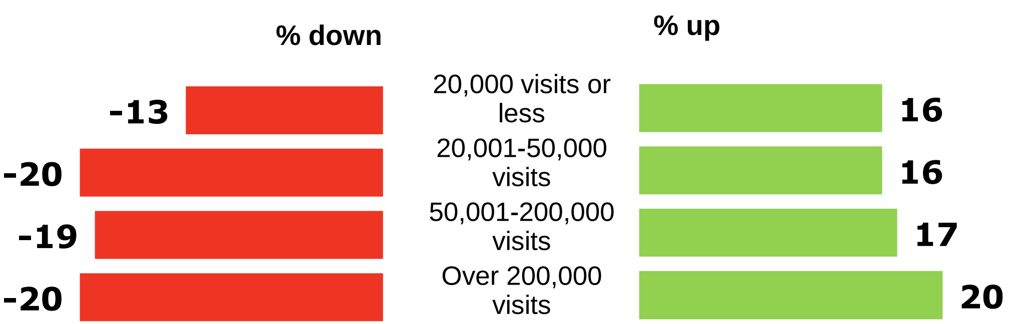
Marketing expenditure trend



Over the past eight years, the proportion of attractions reporting increases in marketing expenditure has been in gradual decline. There are now nearly as many attractions decreasing their marketing investment as there are increasing.

Small attractions (with no more than 20,000 visits a year) are most stable in their marketing spend.

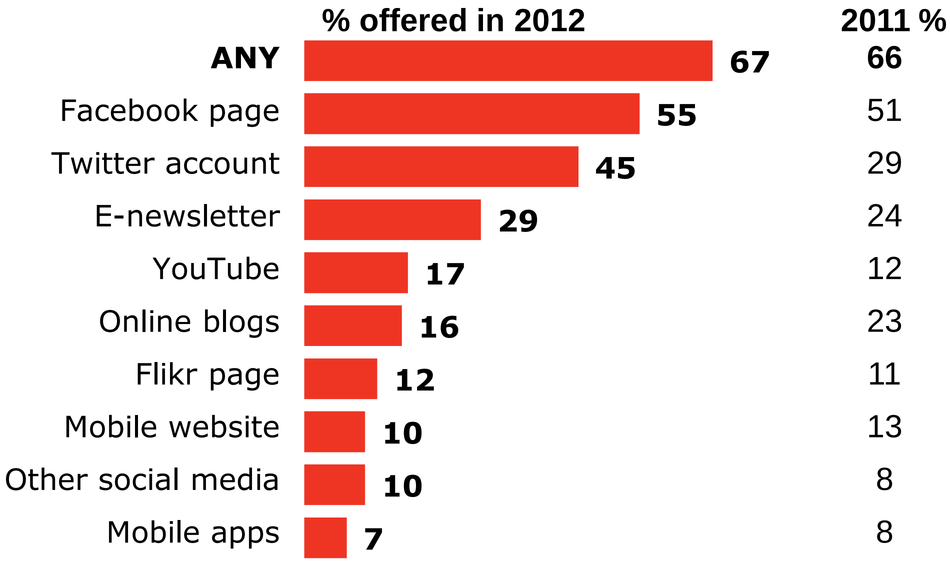
2012



VisitEngland

Base: Attractions answering marketing question (1,147)

Digital communications offered



% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	52	74	88
Facebook page	38	64	83
Twitter account	28	52	72
E-newsletter	17	29	55
YouTube	7	17	39
Online blogs	8	17	34
Flickr page	4	11	30
Mobile website	6	9	21
Other social media	6	11	21
Mobile apps	3	7	16

Consistent with 2011, two-thirds (67%) of all attractions offered some form of digital communications in 2012.

Over half of small attractions (with 20,000 visitors or less) now use at least one form of digital communication.

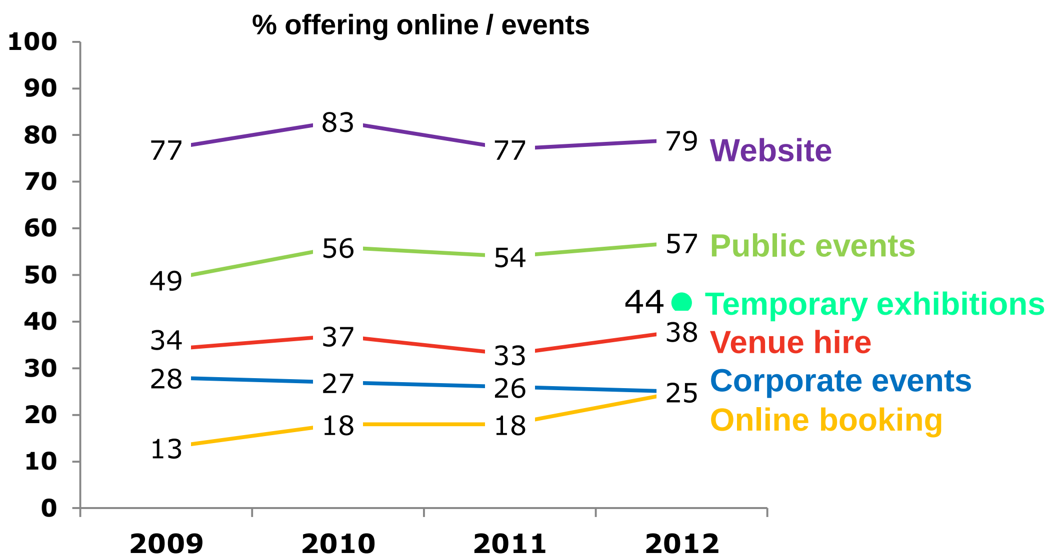
Facebook and Twitter are now in common use, even amongst smaller attractions.

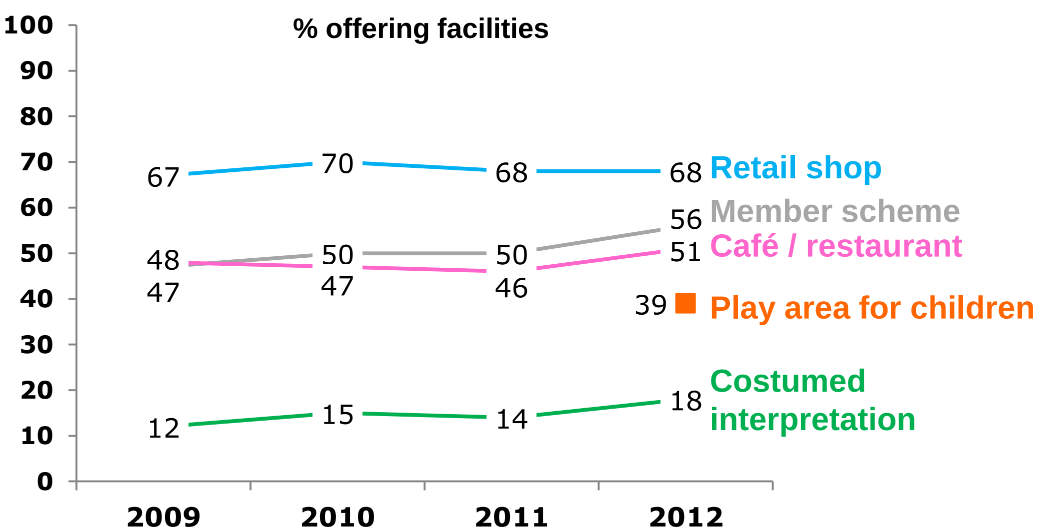
The popularity of online blogs has declined in the last year; instead Twitter has really taken off (now used by 45% of attractions vs. 29% in 2011).

Other digital communications are mostly used by larger attractions (100,000 visitors or more).

Base: All answering digital communications question (1,346)

Provision of services trends





Attractions are asked about the services that they offered across five dimensions:

- Online
- Facilities
- Interpretation
- Events
- Membership

We see an increase in provision across most categories, although this may be driven by the profile of responding attractions, as there are fewer small attractions of 10,000 visitors or less in 2012 and these sites are less likely to offer the same level of facilities.

Offer of Corporate events, however, has been in decline for the last three years, reflecting the difficult economic climate, where many businesses are cutting back on any unnecessary expenditure.

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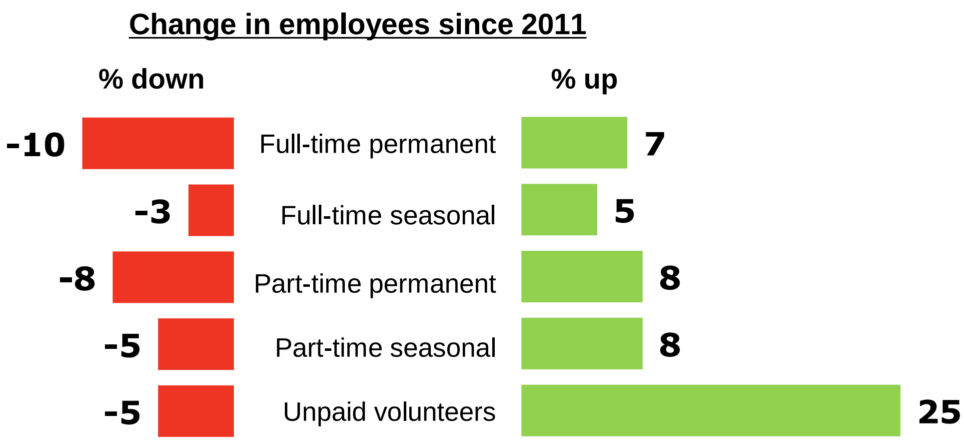
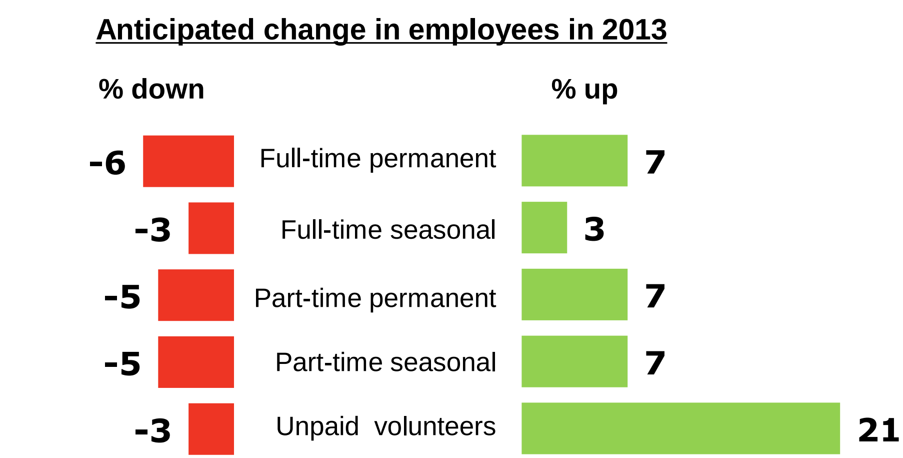
Base: Any answering services question in 2012 (1,346)

Employment trends





Proportions of attractions employing any of the following employees in 2012:

- 79% full-time permanent
- 43% full-time seasonal
- 78% part-time permanent
- 54% part-time seasonal
- 84% unpaid volunteers

In the current challenging financial climate there continues to be a shift towards employees from the voluntary sector. Attractions predict this to continue during 2013.

This has offset another decline in full time permanent employees within the sector, although this decline is predicted to be arrested in 2013.

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Base: All answering employment questions

Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2012

Please help VisitEngland and local Destination Management Organisations establish trends in the attractions' sector in 2012 by taking part in our major annual survey, conducted by BDRC Continental. **ALL ATTRACTIONS COMPLETING THIS QUESTIONNAIRE WILL RECEIVE A PERSONALISED REPORT BENCHMARKING THEIR PERFORMANCE.**

All information you provide in this questionnaire will be treated in strictest confidence (please see Section 5.1 to grant permission to publish visitor numbers)

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by 23rd April 2013 in the pre-paid envelope provided. Please refer to the enclosed guidelines when completing the questionnaire.

To provide your response more quickly, you can complete this questionnaire ONLINE at www.visitenglandattractions.com. Simply login using the User Name and Password details printed below.

If any of the contact information printed below is incorrect or missing, please write in the correct details.

Contact Name:
E-mail:
Position:
Address:

Tel:
Name of Attraction:

ID:
Website:
User Name:
Password:
Serial:

N.B. If the questionnaire should be sent to a different address, please supply separate details.

SECTION ONE – ATTRACTION DETAILS

1.1 In 2011, your main attraction category was:
Is this correct? Yes ☐ No ☐ **If no or missing, please tick below the main category to be used for analysis.**

Castle / Fort	☐	Museum and / or Art Gallery	☐
Country Park	☐	Farm / Rare Breeds / Farm Animals	☐
Distillery / Vineyard or Brewery	☐	Nature Reserve / Wetlands / Wildlife Trips	☐
Garden	☐	Safari Park / Zoo / Aquarium / Aviary	☐
Heritage / Visitor Centre	☐	Steam/Heritage Railway	☐
Historic House / House and Garden / Palace	☐	Other Historic/Scenic Transport Operator	☐
Historic Monument / Archaeological Site	☐	Industrial/Craft Workplace	☐
Place of Worship (still in use)	☐	Science / Technology Centre	☐
Other Historic Property	☐	Other *(Please specify below)*	☐
Leisure / Theme Park	☐		

1.2 Which of these best describes the location of your attraction? Coastal ☐ Rural ☐ Urban ☐

SECTION TWO – VISITORS

2.1 For 2011, your organisation provided us with total visitor numbers (paid and free) of:
Is this correct? Yes ☐ No ☐
If no or missing, please indicate the correct 2011 visitor numbers:

2.2 What were your visitor numbers during the 2012 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).
Total visitor numbers (paid and free) Are these numbers: Exact? ☐ An Estimate? ☐

2.3 What percentage of total visitors in 2012 (paid and free) fell into each category?
Adults %
Children %
TOTAL 100%

2.4 For 2011, your organisation provided us with a total number of school children visits of:
Approximately how many school children visited your attraction as part of an organised group in 2012?
Number of school children Is this number: Exact? ☐ An Estimate? ☐

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

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2012 (including VAT): Adult £ . p Child £ . p
(£ in 2011) (£ in 2011)

2.7 Origin of visitors:

(a) For 2011, your organisation provided us with a percentage of visitors from overseas of %
i) What percentage of total visitors in 2012 do you estimate were from overseas? %
ii) Compared with 2011, was the number of visitors from overseas in 2012: Up ☐ Down ☐ Similar ☐

(b) For 2011, your organisation provided us with a percentage of visitors living locally/within day trip distance of %
i) What percentage of total visitors in 2012 do you estimate lived locally or within day trip distance of your attraction? %
ii) Compared with 2011, was the number of visitors living locally or within day trip distance in 2012:
Up ☐ Down ☐ Similar ☐

2.8 Thinking just about your visitors who are staying away from home in the area, what percentage of these visitors would you estimate decided to visit the area mainly because of your attraction? %

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue
(a) How did the attraction's gross revenue in 2012 compare with 2011? Up ☐ Down ☐ Similar ☐
(b) What was the percentage increase / decrease? %

3.2 Which of the following did your main attraction offer in 2012?

Membership scheme (Members/Friends/Season Tickets)	☐	Corporate events	☐	Public venue hire (e.g. weddings)	☐
Public events (outside usual operation)	☐	Retail shop	☐	Café/restaurant	☐
Costumed interpreters	☐	Website	☐	Online booking facility (tickets, events)	☐
Activity/play area for children	☐	Temporary exhibitions	☐	None of these	☐

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

3.4 Which of the following digital communications did your main attraction offer in 2012?

Facebook page ☐	Twitter account ☐	Flickr page ☐	YouTube ☐	Other social media ☐
Online blogs ☐	Mobile Apps ☐	E-newsletter ☐	Mobile website ☐	None of these ☐

3.5 In 2012, was your main attraction……………?
Open all year round ☐ Closed for part of the year – regular seasonal closure ☐ Closed for part of the year – other reason e.g. refurbishment, repairs ☐

SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2011, was the number of people employed in any tourism-related activities in the attraction in 2012 (including yourself, working owners and self employed)…?:

Full-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Full-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Part-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Part-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Unpaid volunteers: Up ☐ Down ☐ Similar ☐ None ☐

4.2 And compared with 2012, do you anticipate the number of people employed in any tourism-related activities in the attraction in 2013 to be:

Full-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Full-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Part-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Part-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Unpaid volunteers: Up ☐ Down ☐ Similar ☐ None ☐

SECTION FIVE - HOW CAN WE USE YOUR DATA?

The information you provide in this survey will be combined with results from other attractions and used to assess trends in the attractions sector and to inform tourism development and planning locally and nationally.

All data will be held in strict confidence by BDRC Continental and the staff at VisitEngland and local Destination Management Organisations. However, we do encourage attractions to provide permission to publish visitor numbers which could help to raise the profile of your organisation.

5.1 Can we publish your total visitor numbers (Q2.2)? Yes ☐ No ☐

5.2 Arts Council England (ACE) and English Heritage use the museum/art gallery and heritage data from this survey. Can we pass on data from your attraction for this purpose?
Yes to ACE ☐ Yes to English Heritage ☐ No to both ☐ Not a Museum/Art Gallery/Heritage attraction ☐

I declare that the information provided on this form is true to the best of my knowledge.

Signed: Date:
Name: (BLOCK CAPITALS) Job title:

If you would prefer to take part in this survey online in future, please write in your Email Address:

Thank you for participating in this survey. Please return the completed questionnaire by 23rd April 2013 in the pre-paid envelope. No stamp is required. If you wish to contact someone about the survey then please do not hesitate to contact: Abbie McGhie (VisitEngland, t: 0207 578 1465, e: [illegible]) or Emma Hughes (BDRC Continental, t: 0207 400 1014, e: emma.hughes@bdrc-continental.com).

VisitEngland