

Tourism Business Monitor

Visitor Attractions Report

June 2012



Background, objectives and research method

Tourism Business Monitor designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

Amalgamation of two previous surveys discontinued at end of 2011:

- England Attractions Monitor
- Accommodation Business Confidence Monitor

Telephone survey conducted five times per year immediately following key tourism periods among:

- c. 500 accommodation establishments (c. 250 serviced / c. 250 non-serviced), including mix by region, establishment size and hotels / guest houses / B&B / self-catering / caravan and campsites.
- c. 300 visitor attractions including mix by region, attraction type, size (measured by annual visitor admissions) and free / paid admission.

Questions on 'hot topics' included on a periodic basis.

June 2012 fieldwork: 11th to 15th June 2012, reviewing May and early June period, including the Jubilee Bank Holiday weekend.

Easter 2012 fieldwork: 16-23 April 2012, reviewing January to April period

Attractions sample targets (total 300)

Region	
East Midlands	29
East of England	41
London	18
North East	15
North West	32
South East	53
South West	53
West Midlands	24
Yorkshire	35

Size (visitors p.a)	
Over 100k	57
50-100k	35
20-50k	57
Under 20k	152

Type	
Historic	54
Museum/gallery	78
Other indoor	57
Other outdoor	111

Admission charge	
Free	129
Paid	171

This is the target sample for each wave, reflecting the profile of attractions in England. There are minor variations wave on wave, which are corrected by weighting the profile if needed.

Overall we see a **positive picture for the first half of 2012**, with some improvement in visitor numbers compared with the same period in 2011. However, this is largely **driven by a buoyant first quarter**, with **Easter and May-June posing more challenging conditions**, despite the holidays and Jubilee celebrations. Visitor numbers are reported to have fallen by 2% in the May-early June period.

We see a more divided market picture with some attractions benefiting at the expense of others, most notably **outdoor attractions losing visitors to indoor alternatives**, at the hands of the weather. This effect is less notable amongst overseas visitors who are perhaps less likely to change their plans due to the more limited time window for their visit.

Nevertheless, **Outdoor attractions have the most optimistic outlook** in the run up to the school summer holidays – perhaps hoping the weather will finally change for the better, or anticipating a larger international audience.

Larger attractions have been less satisfied with their recent performance and have low confidence for the period running up to the summer holidays. This is explained at least in part by the fact that larger attractions were the most positive about the Diamond Jubilee, but don't have the same hopes for the Olympics.

Overall, the **Diamond Jubilee** is believed to have had a positive impact, but to a lesser extent than hoped for at the start of the year, with only 39% positive and 17% believing it limited visits to their attractions.

Uncertainty about the impact of the **Olympics** remains, and attractions in the South and Midlands are feeling less positive than they did at Easter.

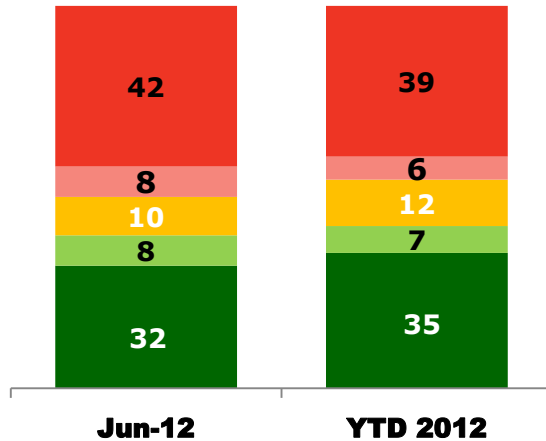
Business Dashboards



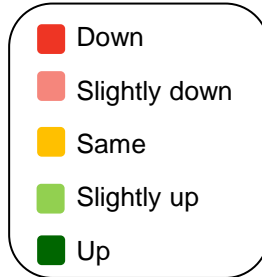
Business Performance Dashboard: Attractions

VISITOR NUMBERS

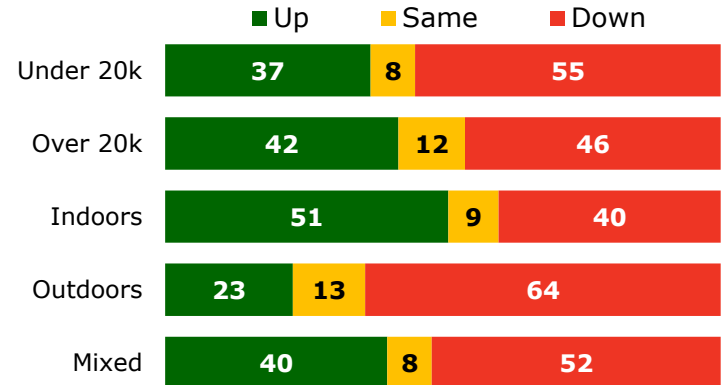
Visitor numbers (%)



Versus same period previous year...

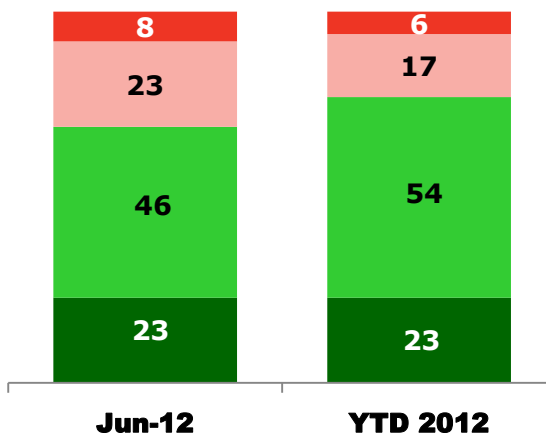


Visitor numbers versus Apr-June 2011(%)



SATISFACTION

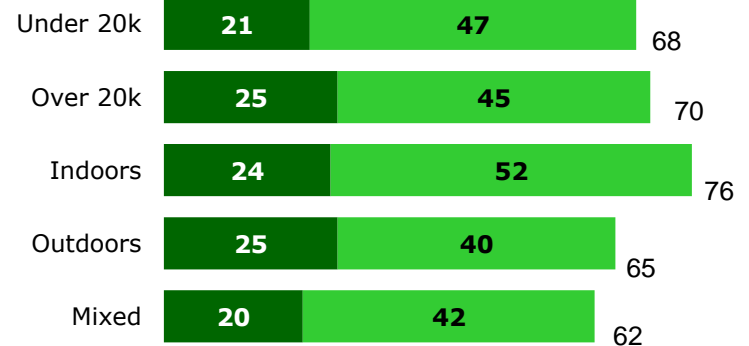
Satisfaction (%)



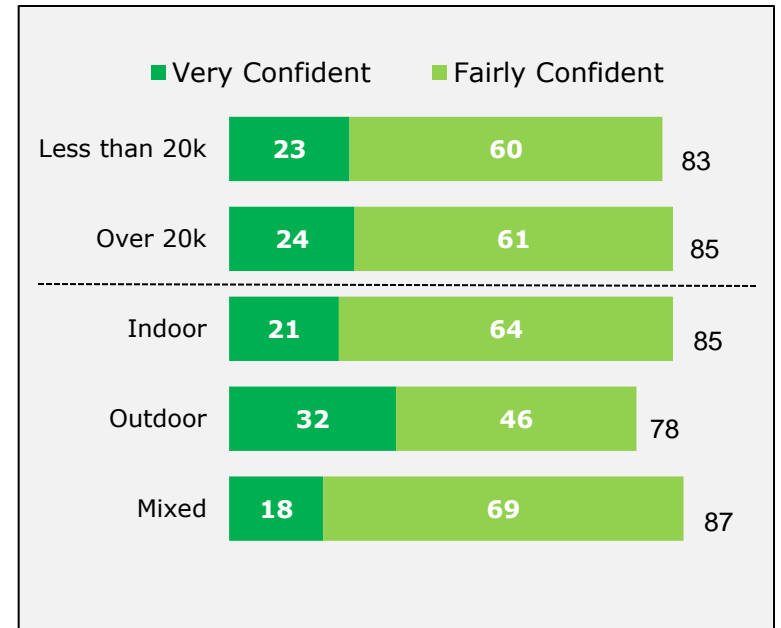
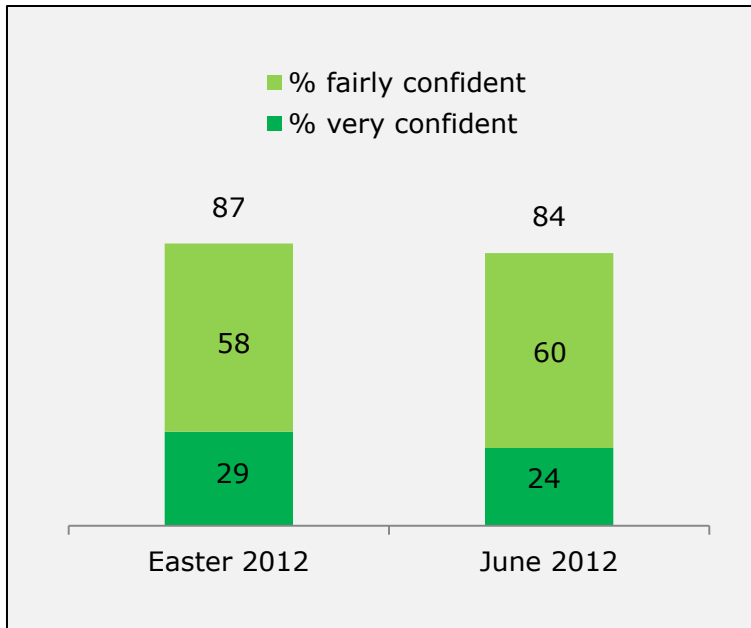
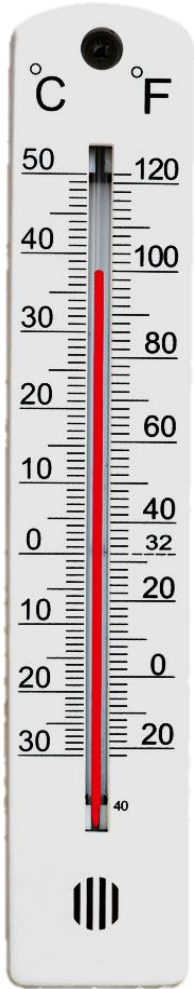
Satisfied with business performance...



Satisfaction with May-June 2012 Performance (%)



Business Confidence Dashboard: Attractions



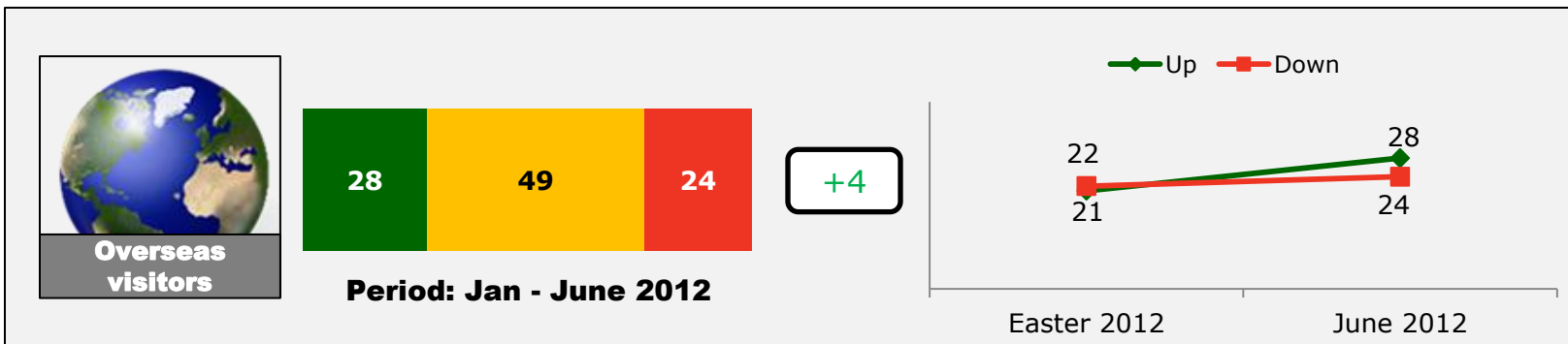
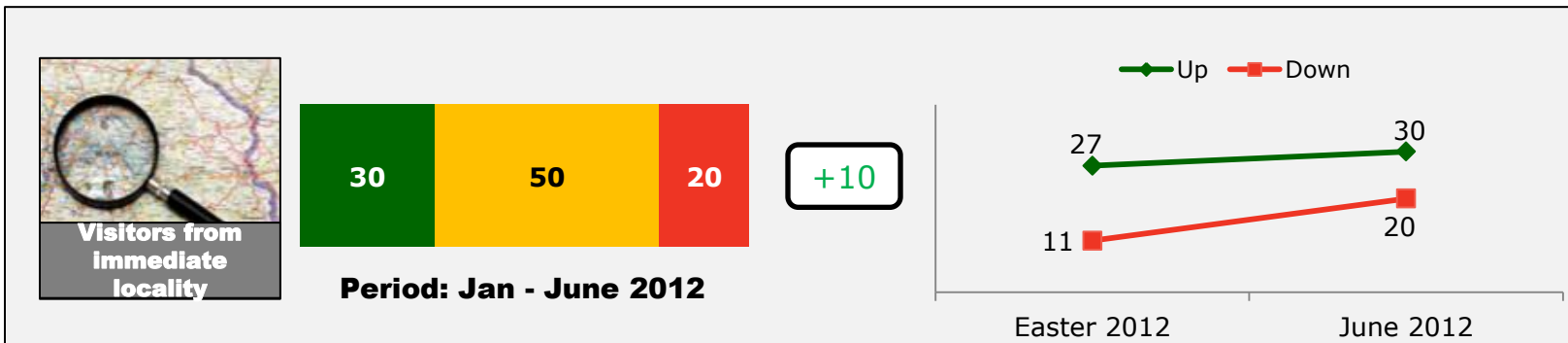
PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
 Easter 2012: up until early June
 June 2012: up until start of summer holidays

Visitor profile



Changing Visitor Profile (year-to-date vs. previous year)

■ Up ■ Same ■ Down **NET:**
Up - Down

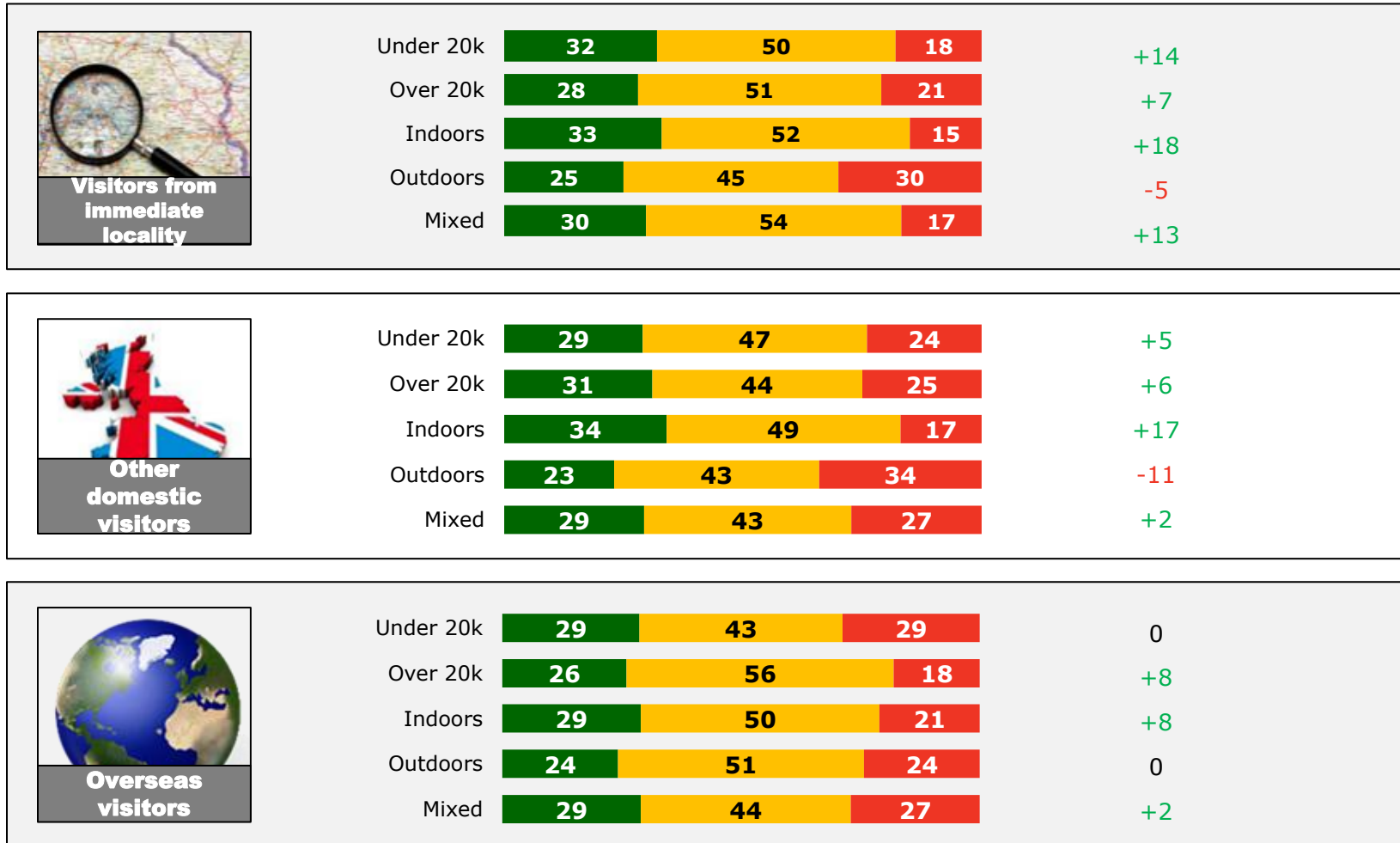


Changing Visitor Profile (year-to-date vs. previous year): Attraction type

Attractions of all sizes are performing well in comparison with the same period in 2011. However, outdoor attractions appear to be suffering due to the bad weather this year.



NET:
Up - Down

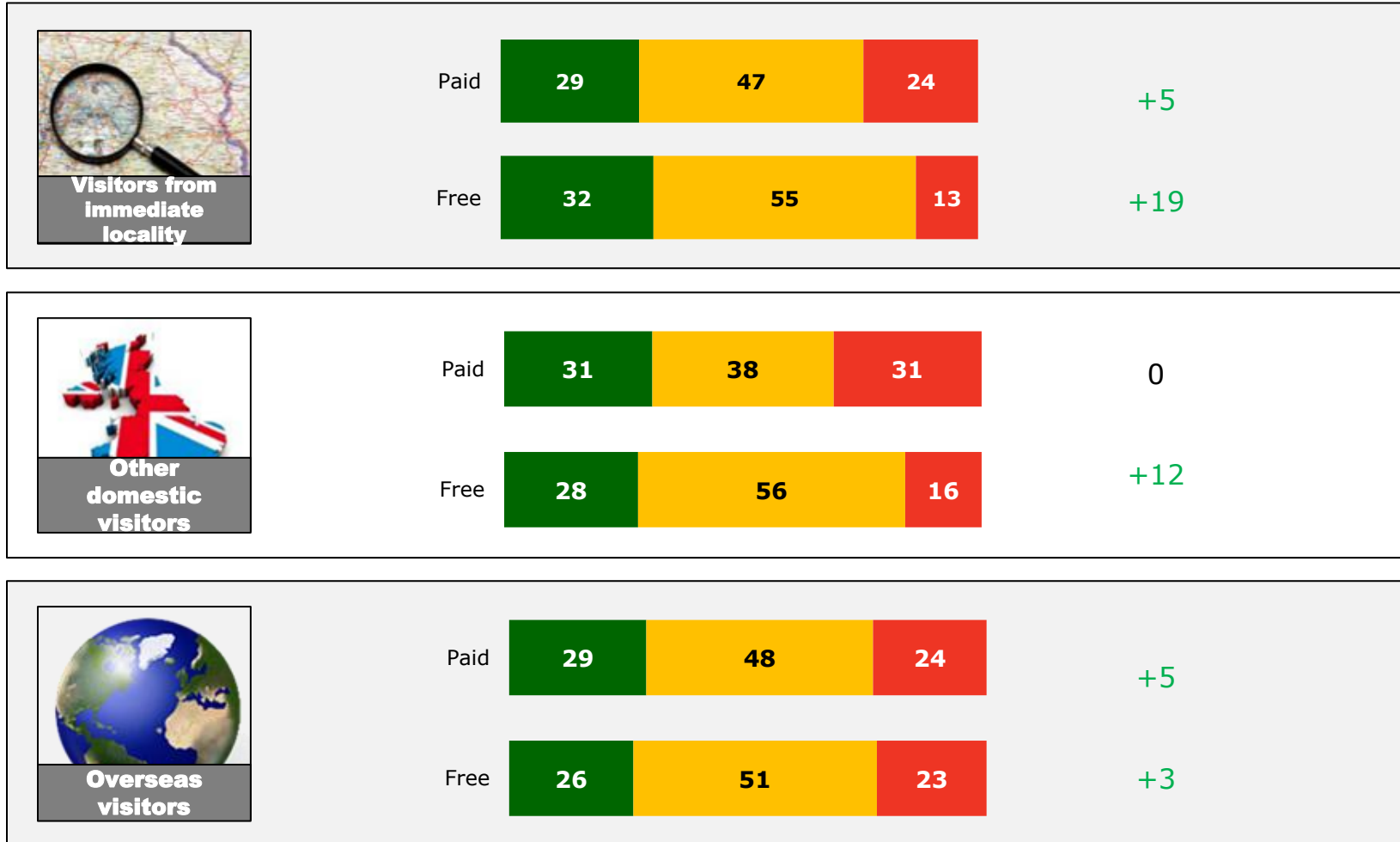


Changing Visitor Profile (year-to-date vs. previous year): Charging

It seems that visitors are continuing to tighten their belts, as the popularity of free attractions has grown significantly since last year.



**NET:
Up - Down**

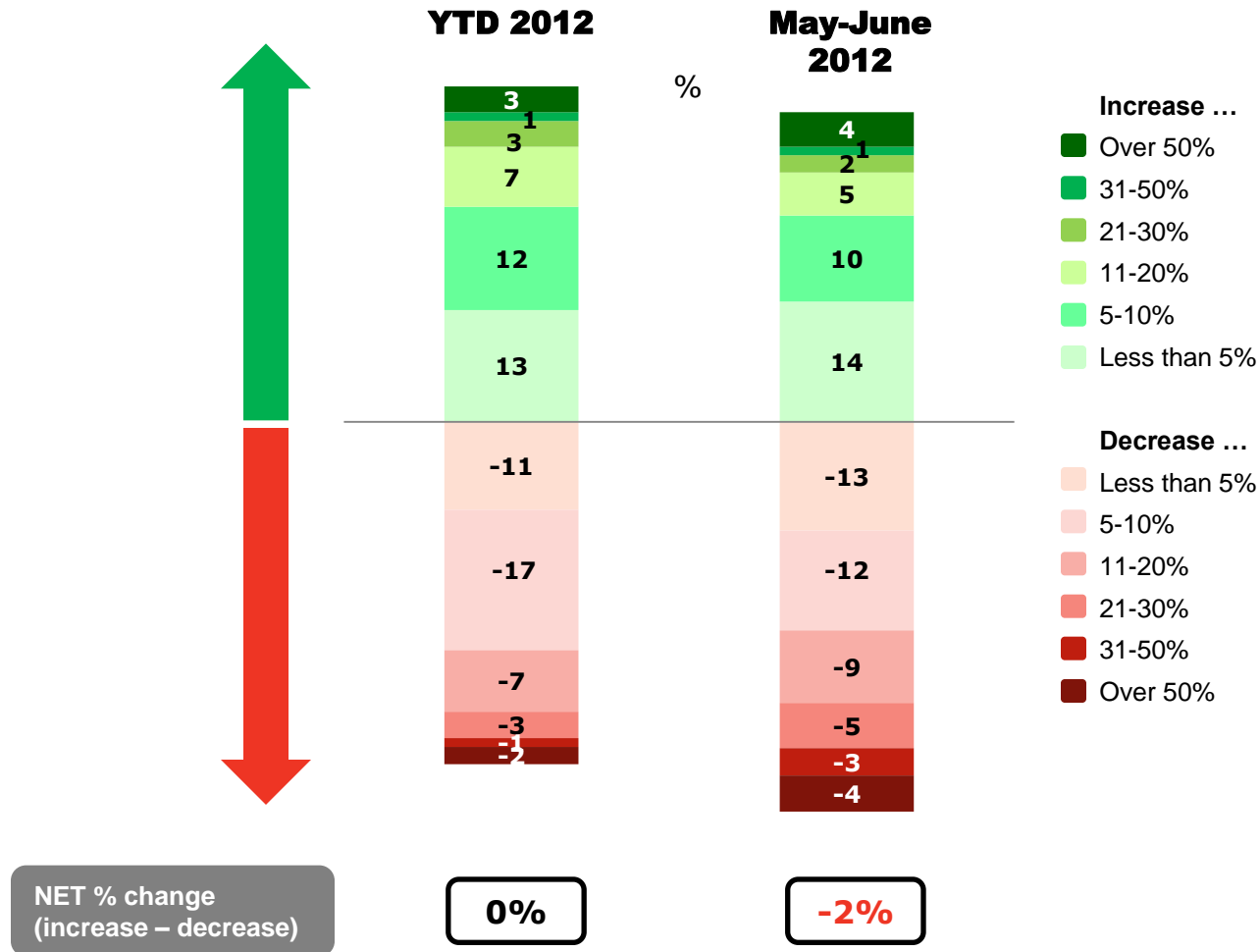


Past performance



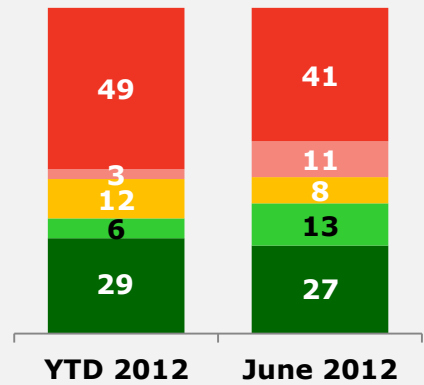
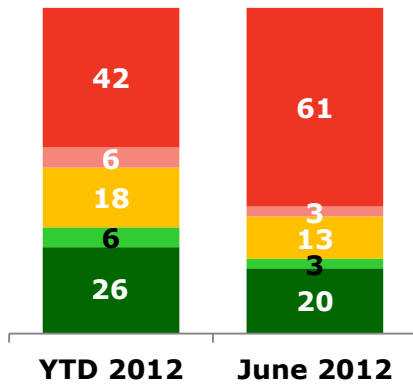
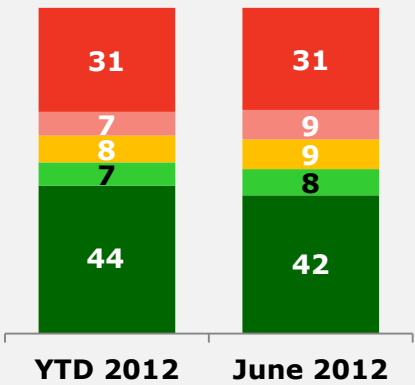
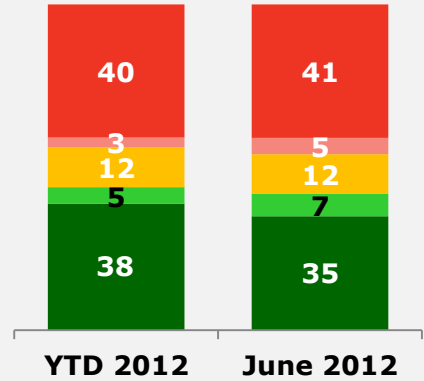
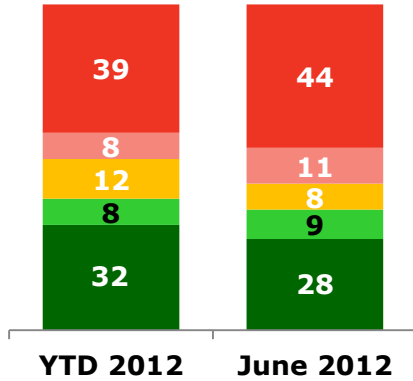
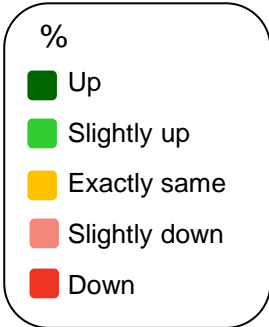
Visitor Numbers: Year-on-year changes (%)

Q1-2 2012 has matched last year in visitor numbers, but this has fallen off in the May-June period, despite the Jubilee celebrations. Visitor numbers estimated to have fallen by 2% on average.



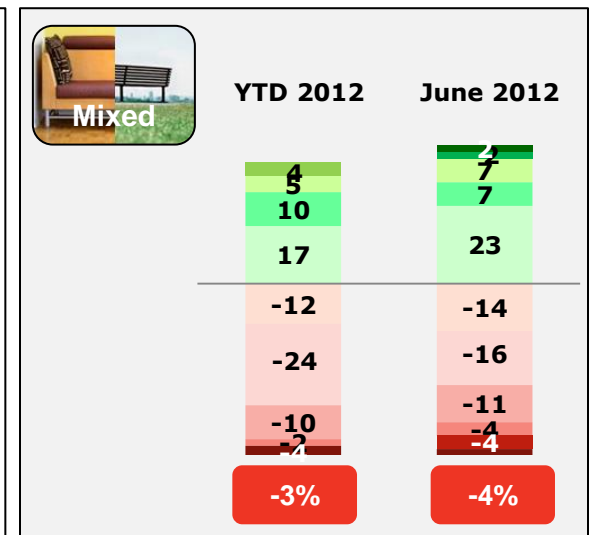
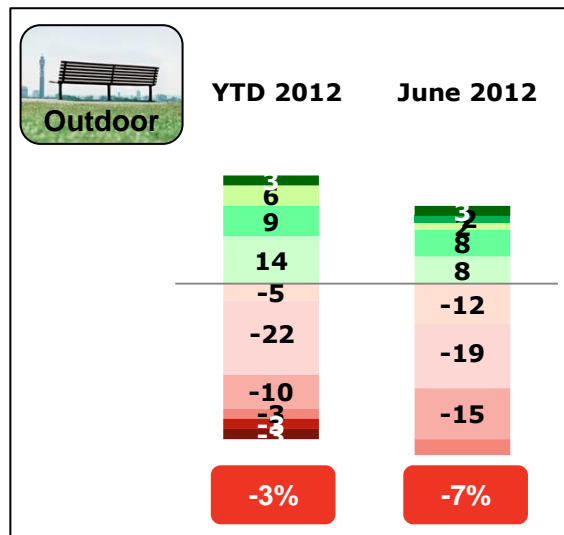
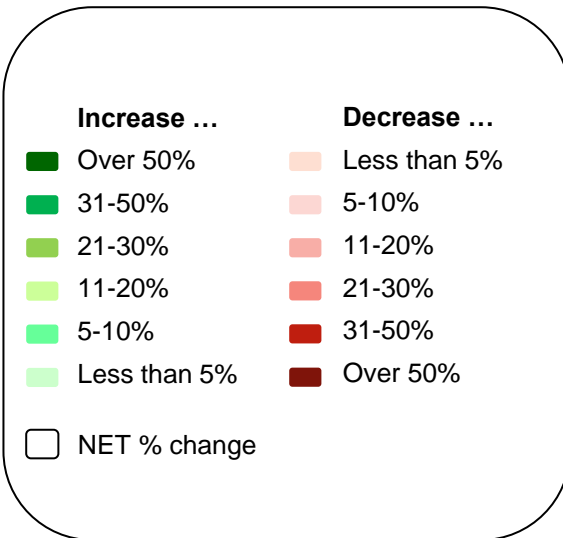
Visitor numbers: Year-on-year changes by attraction type

May to June has been a difficult time for Outdoor attractions, reflecting the poorer weather.



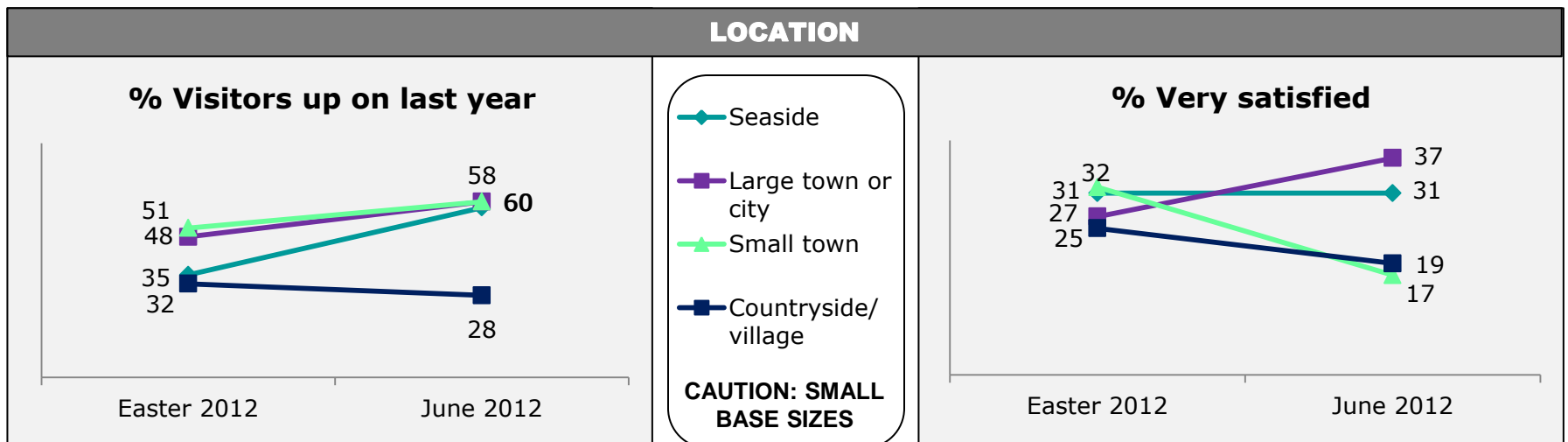
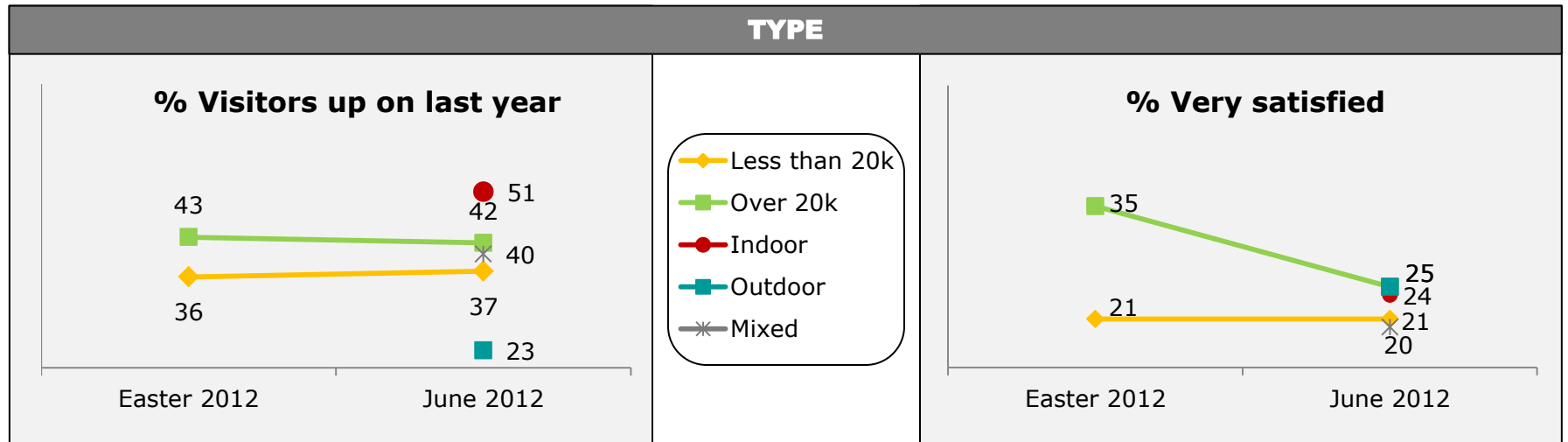
Visitor numbers: Degree of year-on-year changes by attraction type

Indoor attractions have picked up some of the Outdoor business.



Changing business performance: By attraction type & location

Although visitor numbers at larger (over 20,000 visitors per annum) attractions and in small towns have remained fairly stable, it seems that they have not met expectations, with lower satisfaction in June than in Easter. Were there inflated expectations of consumer spend over the Jubilee bank holiday?

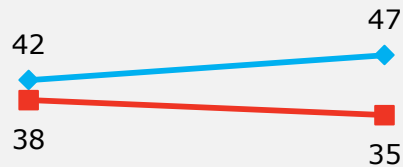


Changing business performance: By admission charge and VAQAS

Free attractions continue to attract more visitors in May/June vs. 2011 but this is not matched by satisfaction of site managers.

ADMISSION

% Visitors up on last year

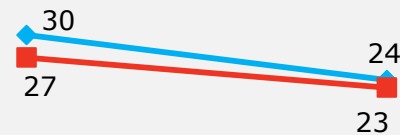


Free
Paid

Easter 2012

June 2012

% Very satisfied



Easter 2012

June 2012

VAQAS

% Visitors up on last year

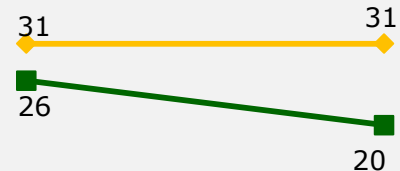


Members
Non-members

Easter 2012

June 2012

% Very satisfied

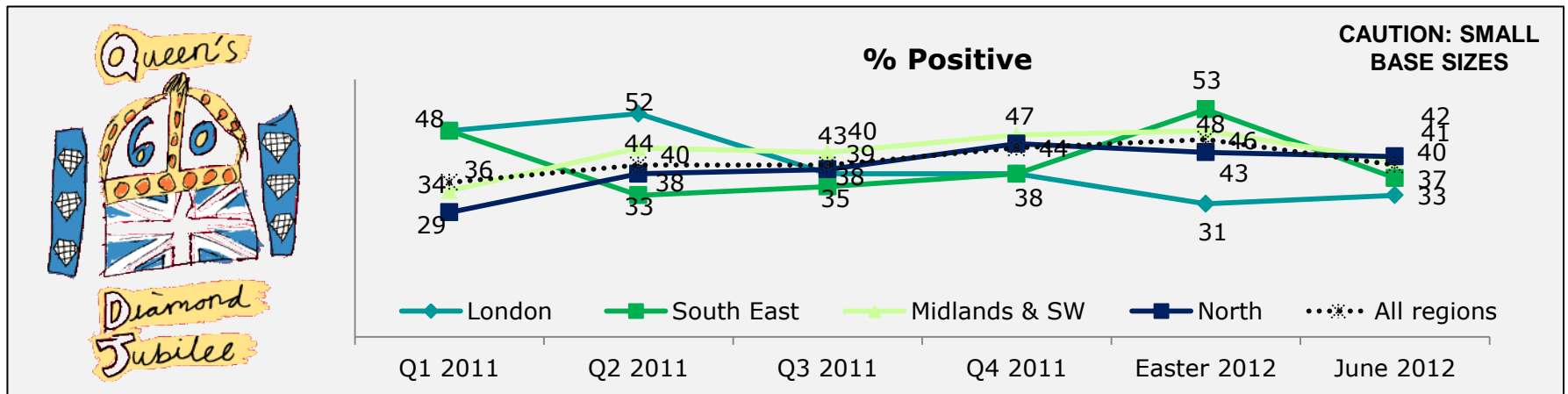
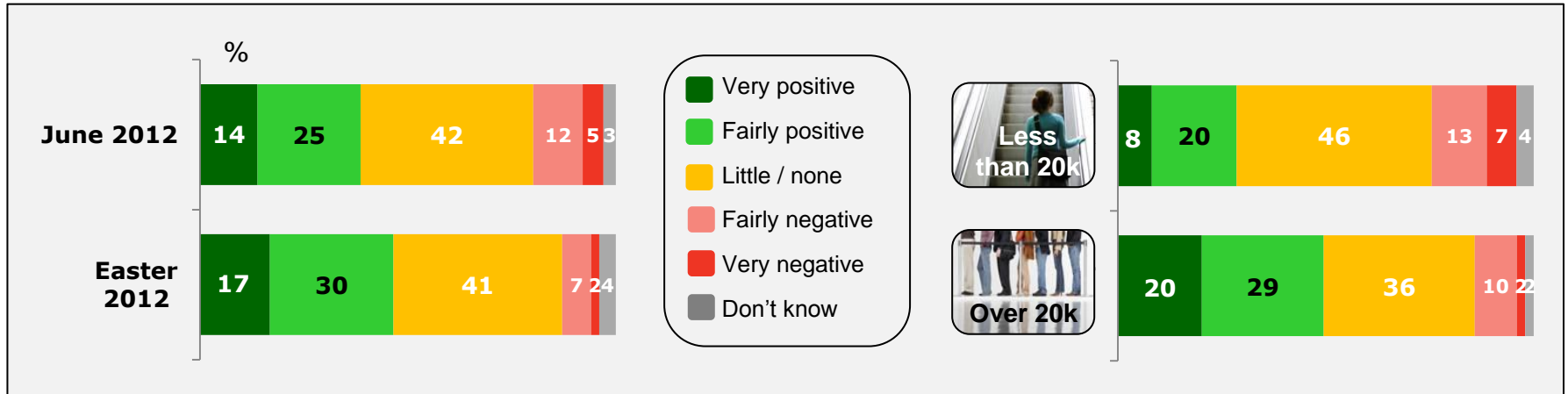


Easter 2012

June 2012

Impact of Queen's Diamond Jubilee and extra Bank Holiday: Attractions

Overall it is felt that the Diamond Jubilee had a positive impact on the visitor attraction business in England. However, feelings waned slightly after the event, with 1/6 believing it had a negative impact on their business. Larger attractions benefited the most from the celebrations.



Positive verbatim comments on business performance

“

Significant and additional events. It has drawn in more visitors - good publicity and positive press

Jubilee, advertising, promotions, increase leaflets, advertising in local papers, more events have all made a difference.

New advertising and great media coverage. Basically it's because of the temporary Titanic exhibition that we have running at the moment it has attracted a lot of interest and we've had news crews and public media coming to visit and talking about it.

We have grown a lot since last year which has caused an increase in people coming. We are fortunate that we did a birthday launch of a product which has a good effect on that period. Also because of the bank holiday, people were free and they had time to do things and were looking for things to do, so they came to our attraction.

We had visits from Argentina academia which gave the monument good promotion

Because of the publicity we've been having lately with all our new displays. Well we've extended the museum so that has helped. I think people are more optimistic when it comes to educational events now.

People holidaying in Cornwall more, the increase in that helped us.

The weather - it is a massive influence on us. Last week we had a very rainy period which attracts visitors as we are an indoor attraction.

”

Negative verbatim comments on business performance

“

The Jubilee weekend was a debt to our company, there were other things going on and we were not top of the that list.

Lot of other attractions in the area that people are being attracted to rather than here.

The general state of the economy. People are worried about the future and not spending as much as before.

The recession, with 2 months of negative growth people have got less money to spend which we have noticed has affected our leisure spend.

Well as I said poor weather conditions have affected us and also people have got less money in their pockets which is stopping them from coming out.

Well each time that we have had a major event it has rained which obviously limits the number of people coming.

The price of petrol and the weather, with all the weather forecasts not being accurate.

I'd say the weather. With our attraction being outdoor if its wet and windy we lose visitors

We are an outdoor attraction so if the weather is pouring with rain no one wants to come.

Well I mean we're an outdoor seaside attraction so if the weather isn't good people wont come... And you know how the weather has been up and down lately.

The weather. Our business is totally dependent on the weather - if it rains no one comes.

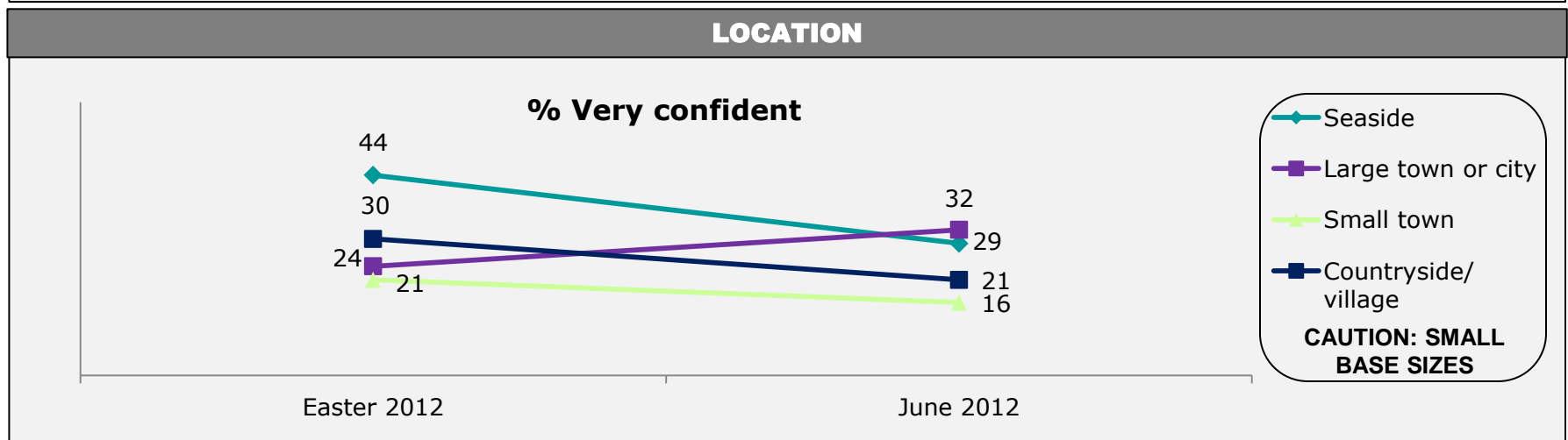
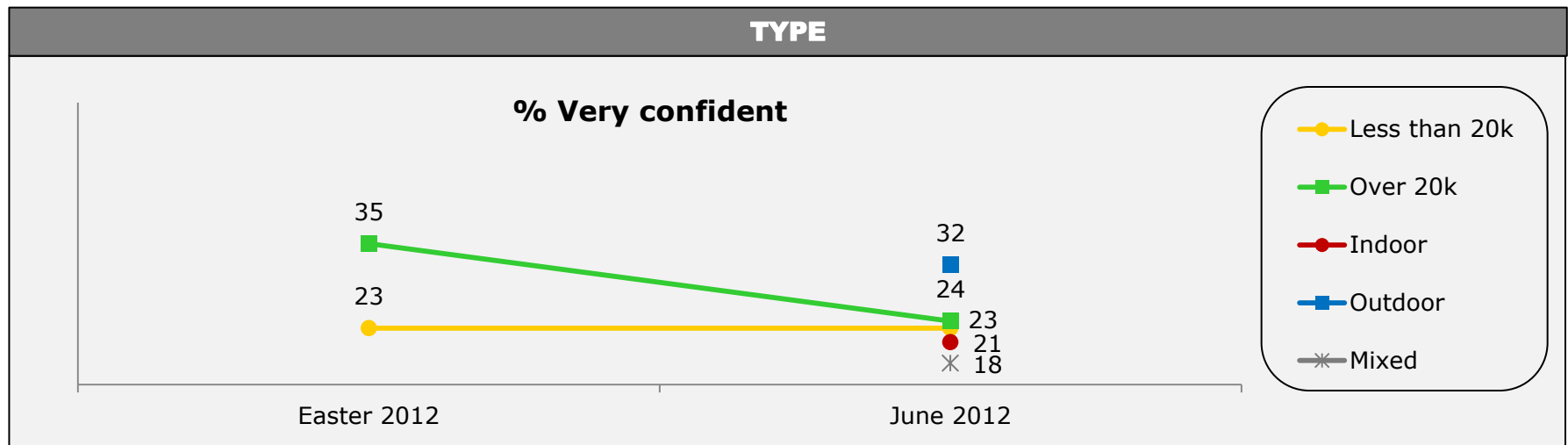
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Future performance



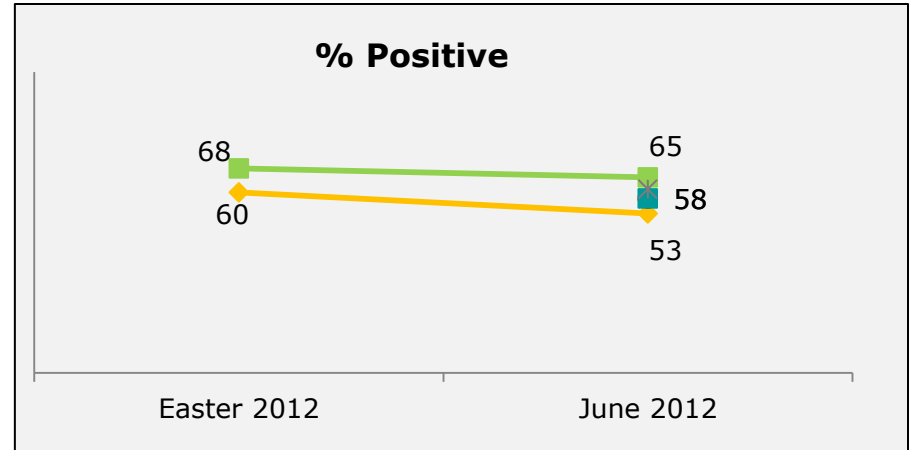
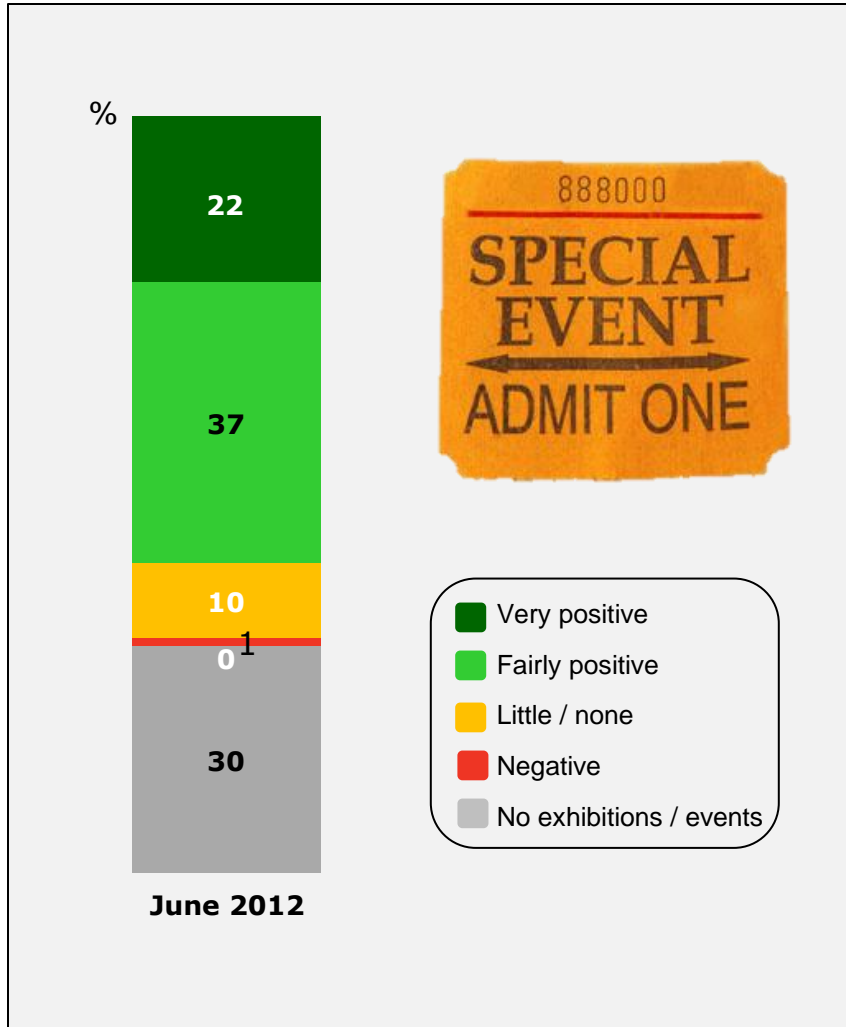
Confidence for forthcoming period: Attractions

Outdoor attractions are the most optimistic in the run up to the school summer holidays – perhaps hoping the weather will finally change for the better? However, the confidence of seaside establishments has waned.

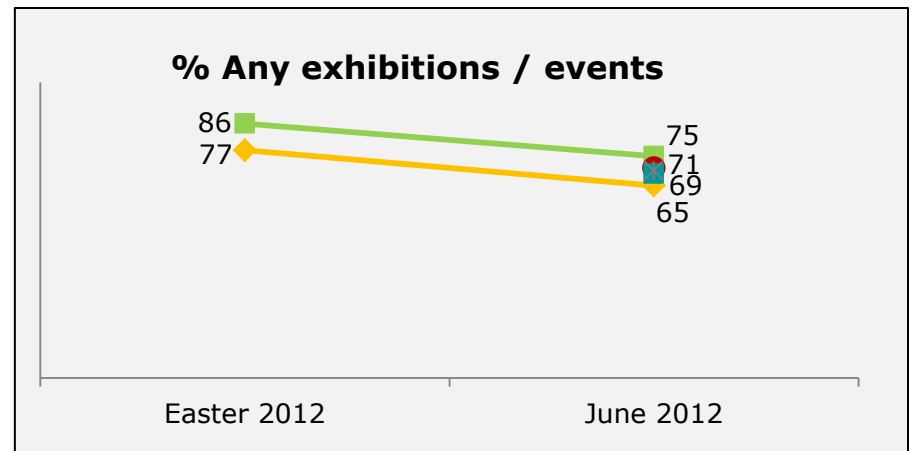


Impact of exhibitions/ events: Attractions

70% are running events between June and start of the summer (late July) – slightly less than in the Easter-early summer period. Attraction staff remain upbeat about these events, believing these events will have a positive impact on business.

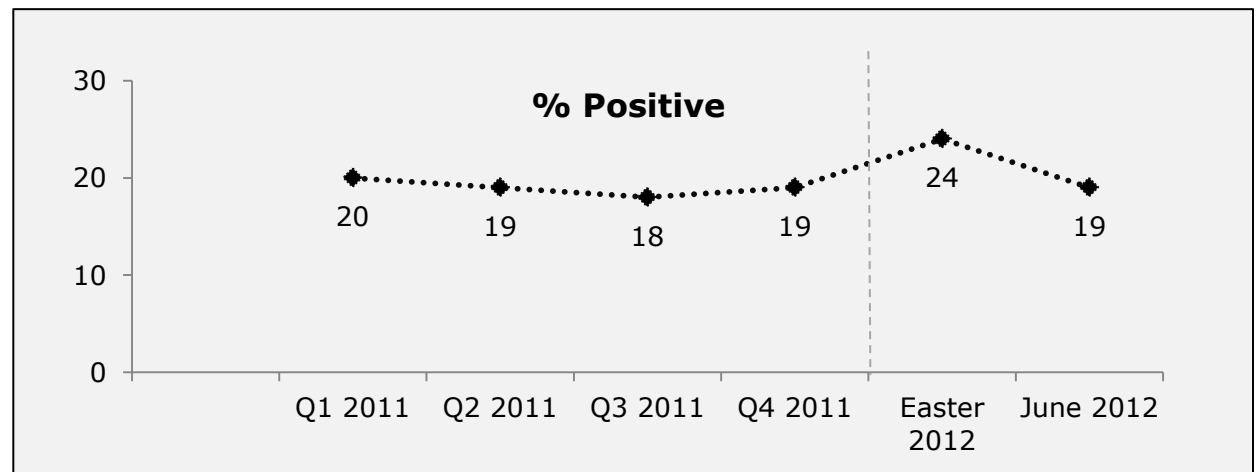
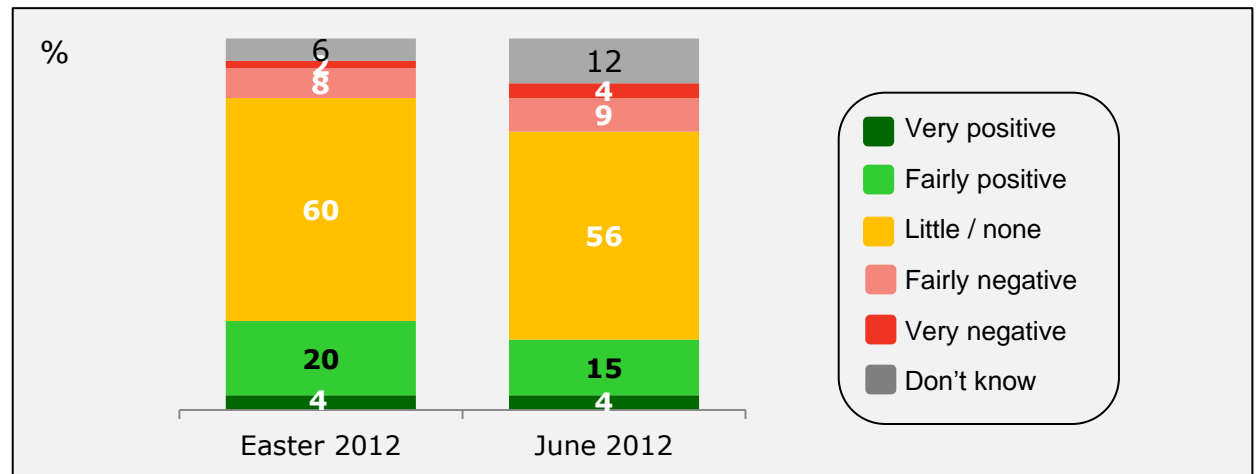


Less than 20k Over 20k Indoor Outdoor Mixed



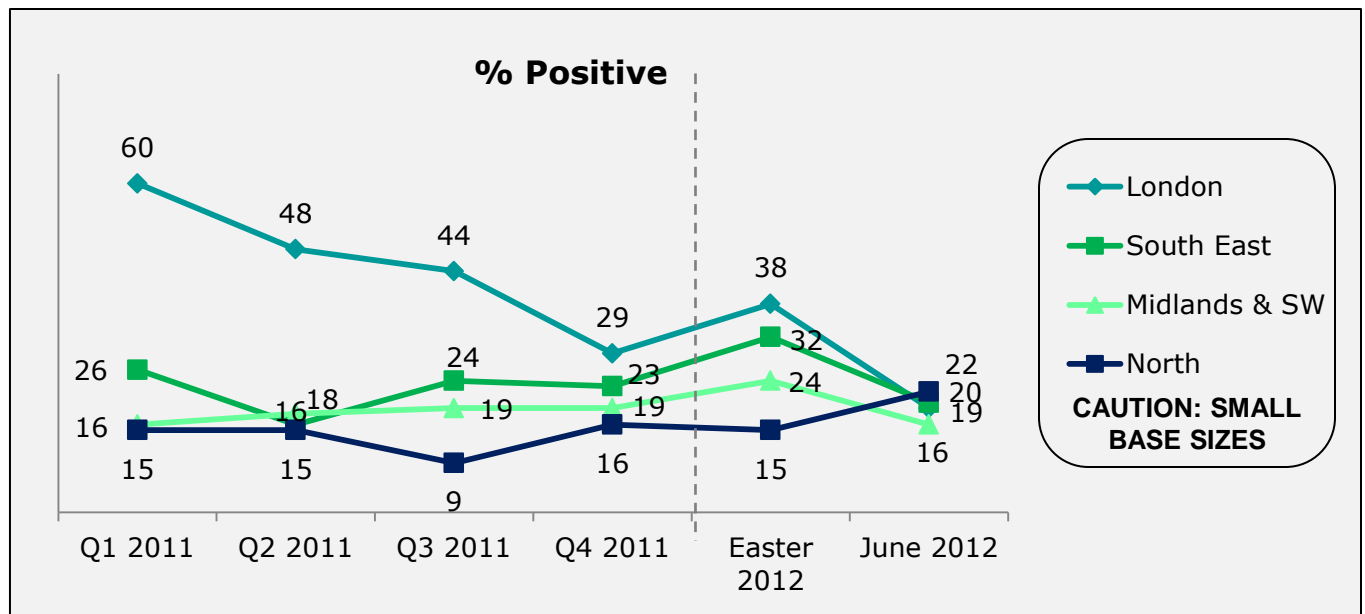
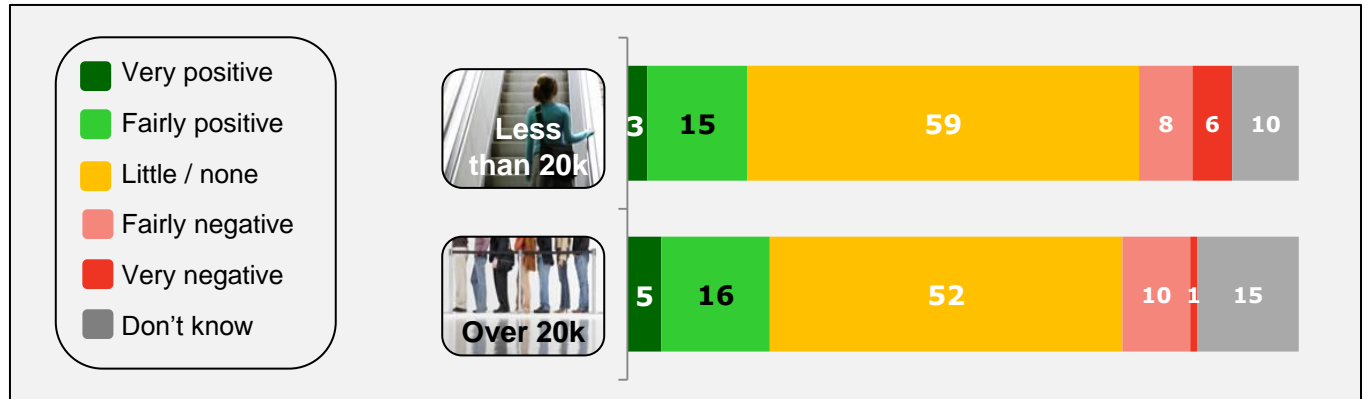
Impact of 2012 Olympics: Attractions

Slightly more uncertainty about the Olympics among attractions – although the majority still believe it will have little impact on business.



Impact of 2012 Olympics: Attractions by region

Positivity towards the Olympics among London attractions continues to fall as it gets closer, and is now in line with the rest of the country.



Positive verbatim comments on business confidence

“

This year we are open virtually 7 days a week and we have two paid staff. We have also expanded the building and we are doing a hell of a lot more.

We intend to put in some extra effort into putting on presentations. Also we will be increasing the amount of advertising in the local area.

We are currently up a little on tourists from the immediate locality and that keeps on improving a lot.

We were hoping to attract a lot of people with a wide variety of events. We have got things like art work shops, performances, children's activities...

We have a good exhibition planned - our gallery tends to be bring more viewers.

Well we've been putting on events and released a press release so I think it has improved our publicity around the local area.

I'm fairly confident. There seems to be an upward trend and we have more programming, better publicity and admissions are up.

It's good because people are staying in the UK. We have noticed the increase of people using local facilities more over the past 5 years, due to the economic climate.

I'm fairly confident because we have new exhibitions and that will have a positive effect.

It is programme driven really. So we have a lot of events and exhibitions coming up before the holidays so I think it will have a very good affect and will lead to more visitors coming.

”

Negative verbatim comments on business confidence

“

People are not spending their money with us. I honestly think it's because of the rise in petrol prices.

Where we are it's quite rural and people aren't spending money on luxury items everyday - people just can't afford it.

At the moment it's a grim outlook. I totally rely on the weather because I do boat tours - the weather determines where my business will go. If we don't get the weather I don't work.

Well we haven't got many holidays bookings because nobody's got any money because of the economy. The weather - because the weather influences whether people go on holiday.

The weather has a major effect on us, because it stops people from wandering around the town and there is a lot of passing trade here.

It's a bad time for Art galleries in this economic climate. We are luxury and people are not spending money like they did last year.

We have got so many other events going on such as the football and the Olympics is coming up and I think that people are just staying at home and not taking part in leisure activities.

The weather is very on/off, it is very difficult to predict whether people are coming in or not. Also the Olympics will stop people from visiting us as well.

”



Performance and confidence snapshot: June 2012

		Visitor Numbers (June)			Visitor Numbers (Year-to-date)			Confidence (Early Summer)	
		Up	Same	Down	Up	Same	Down	Very	Very / fairly
TOTAL (%)		40	10	50	41	12	45	24	84
Visitor numbers per annum (%)	Less than 20k	37	8	55	39	12	46	23	83
	20k or over	42	12	46	43	12	43	24	84
	20k-50k	30	18	53	34	20	44	18	90
	50k-100k	57	17	26	54	14	29	33	82
	Over 100k	46	4	50	45	4	51	23	81
Type (%)	Indoor	61	9	40	51	8	38	21	86
	Outdoor	23	13	64	32	18	48	32	78
	Mixed	40	8	52	35	12	52	18	87
Charge (%)	Paid	35	7	58	36	12	50	19	81
	Free	47	14	39	48	13	37	28	87
VAQAS (%)	Yes	40	10	50	48	11	39	20	87
	No	39	10	51	39	13	47	25	83
Location (%)	Seaside	58	8	33	45	9	45	29	87
	Large town / city	50	12	38	53	20	22	32	94
	Small town	50	5	45	53	-	44	16	80
	Rural	28	11	60	31	14	53	21	80