

Tourism Business Monitor

Visitor Attractions Report

Wave 4 – Post school summer holidays



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.

Sept 2012 Fieldwork: 10th to 17th Sept 2012, reviewing the school summer holidays

July 2012 fieldwork: 16th to 24th July 2012, reviewing the period after the jubilee bank holiday weekend until mid July

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.

Aside from businesses directly benefiting from the Olympics, the summer holidays has remained a difficult period for attractions. Half of attractions report that admissions are down with average visitor numbers 2% below the 2011 summer holidays.

However, we are starting to see some early signs of improvement in the market. Admissions levels have improved compared with the early June - mid July period when a 5% decline in year on year admissions was reported.

Attraction admissions have been bolstered by local visitors, most likely associated with the contraction in the number of holidays taken away from home, and this has helped to inspire more confidence in the run up to half term.

The long awaited sunshine, alongside the close of the Olympics have also contributed to greater business confidence. Although the Games are thought to have had a negative impact on tourism in the short term, there is some optimism for its potential to drive longer term business for UK tourism.

Overall the picture is starting to look more positive across the board, with an improvement in year on year business performance for most types of visitor attractions.

As may be expected in a difficult economic climate, free sites are faring better than paid (although this is less marked amongst overseas visitors), and indoor/ mixed attractions have proved more resilient to the impact of a wet summer than those outdoors.

Larger attractions (with over 20,000 visitors) managed to equal last year's admissions over the summer period while visitors to smaller attractions are still down by an average of 4%.

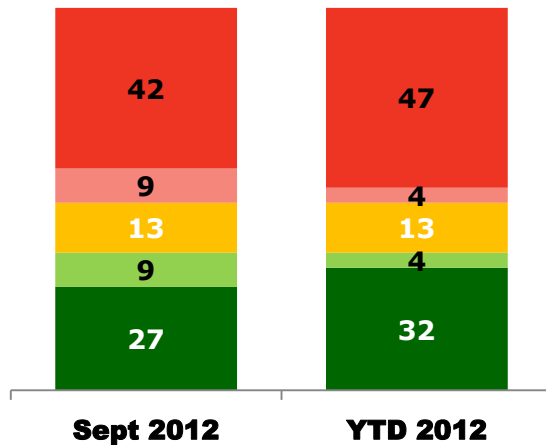
Business Dashboards



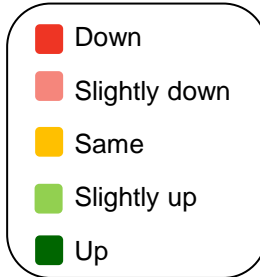
Business Performance Dashboard: Attractions

VISITOR NUMBERS

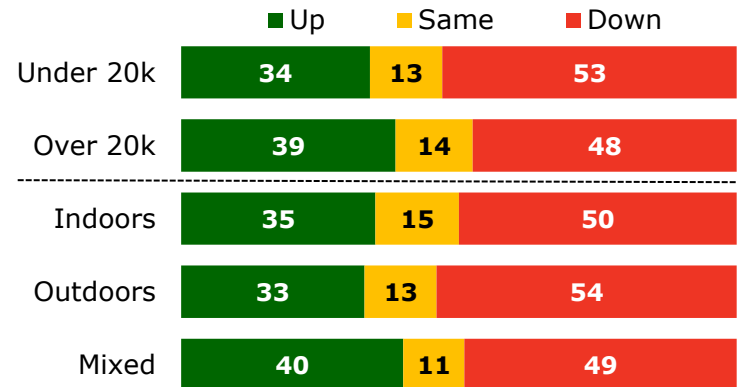
Visitor numbers (%)



Versus same period previous year...

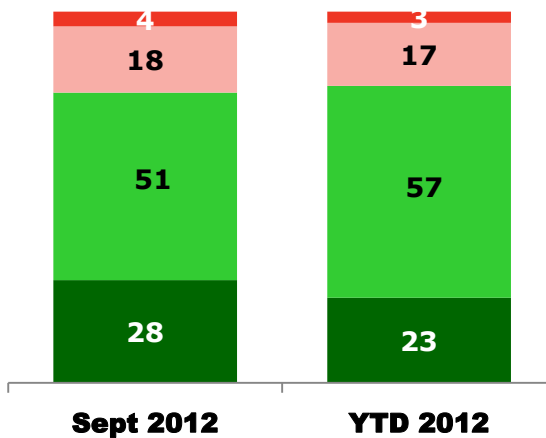


Visitor numbers versus July-Sept 2011(%)



SATISFACTION

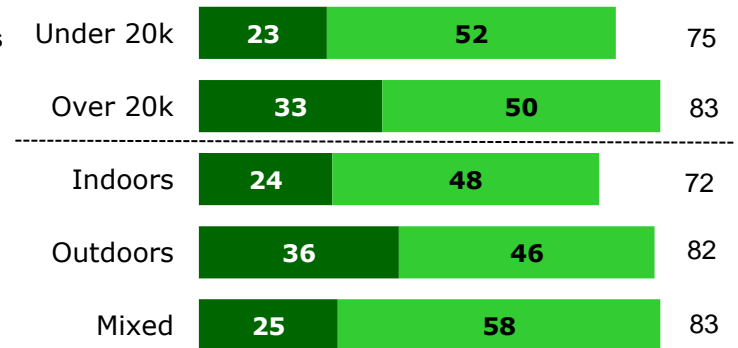
Satisfaction (%)



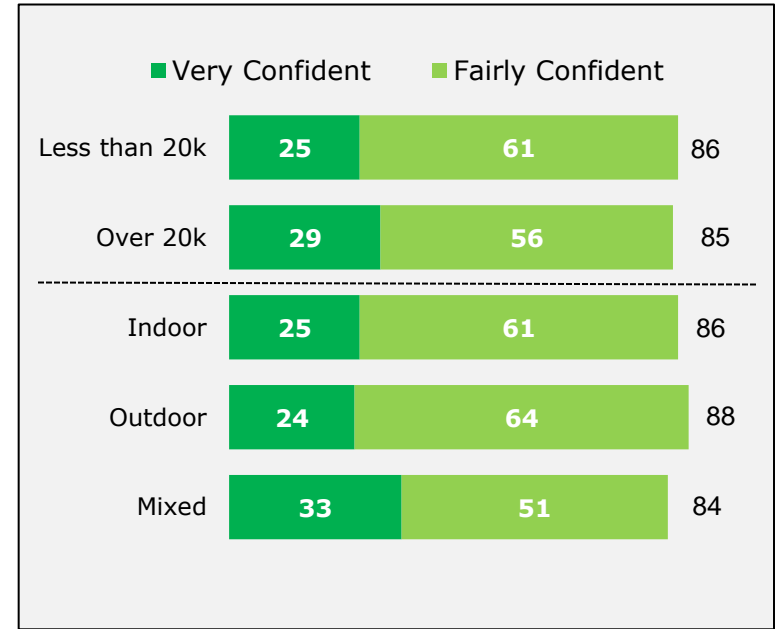
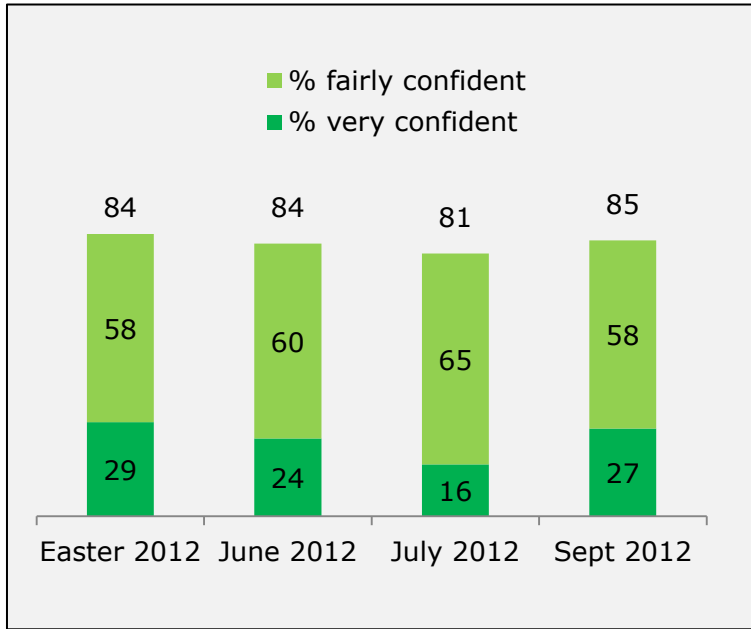
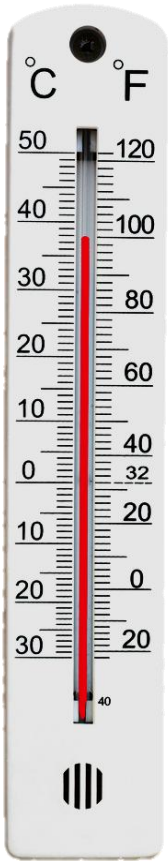
Satisfied with business performance...



Satisfaction with July-Sept 2012 Performance (%)



Business Confidence Dashboard: Attractions



Survey conducted:	Easter 2012	June 2012	July 2012	Sept 2012
Period asked about:	Until after Jubilee	Until start of summer hols	Until end of summer hols	Until end of October

Visitor profile



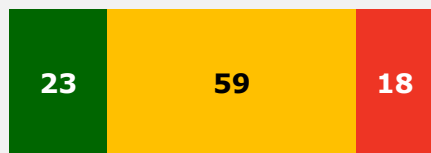
Changing Visitor Profile (year-to-date vs. previous year): Attractions



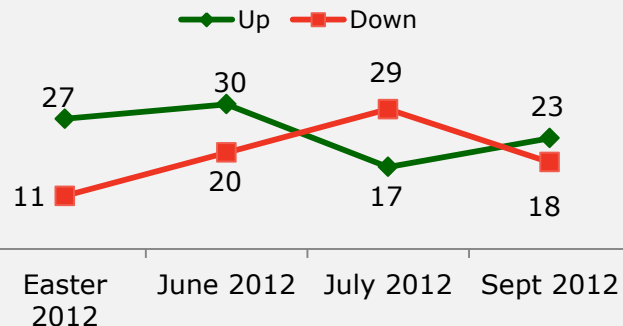
NET:
Up - Down



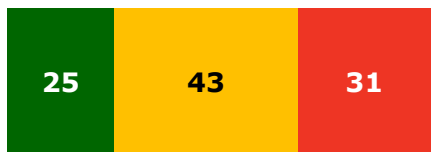
Sept 2012



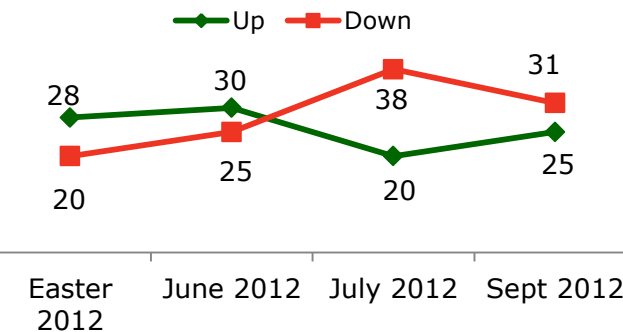
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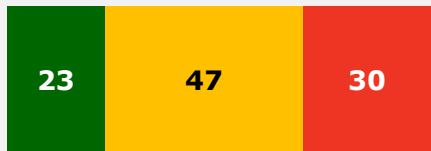
Sept 2012



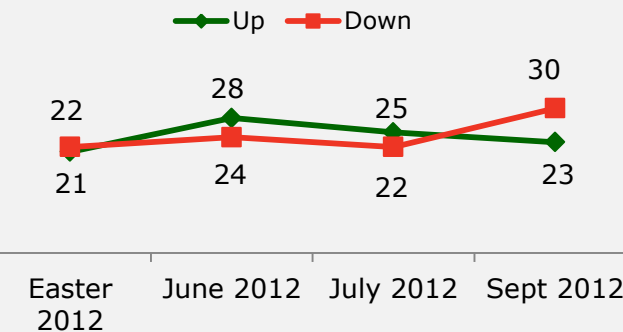
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Sept 2012



-7

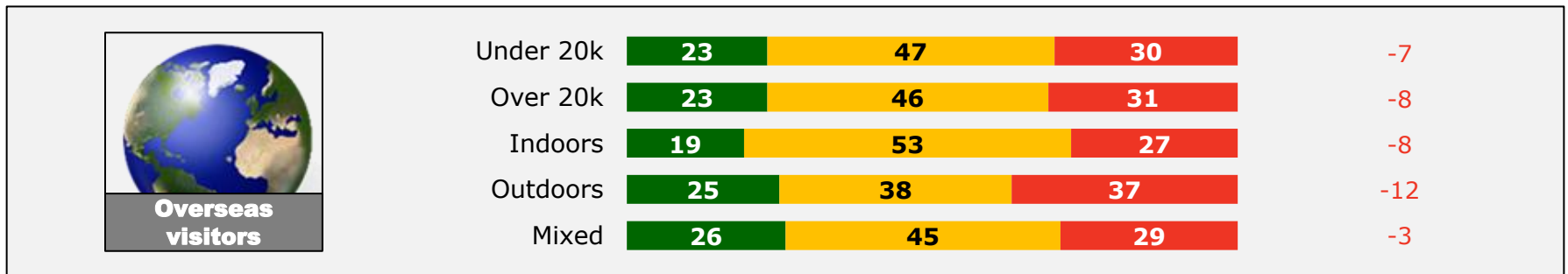
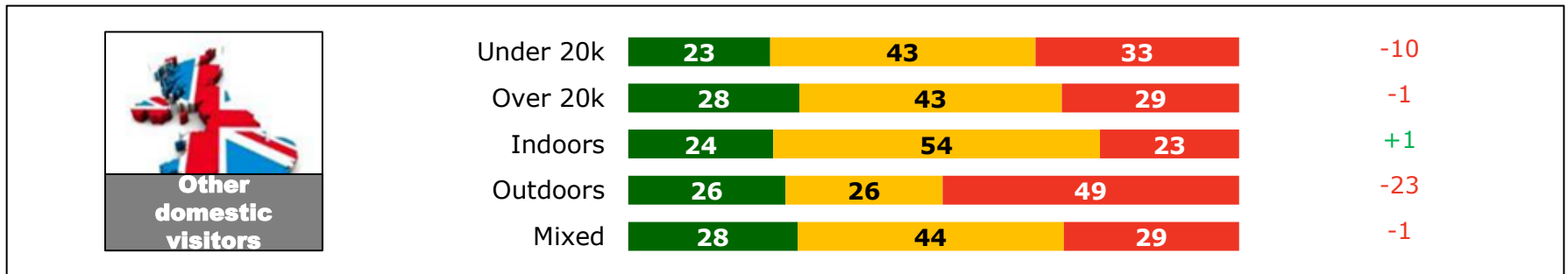
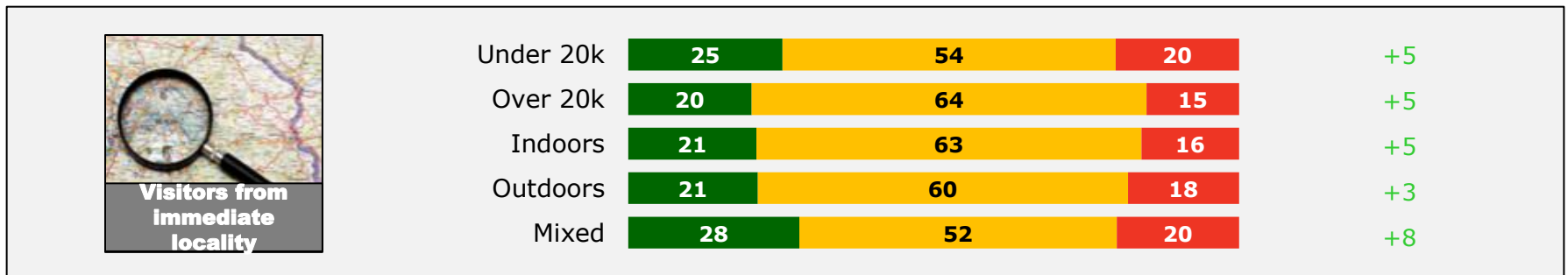


Changing Visitor Profile (year-to-date vs. previous year): Attraction type

Attractions report a slight increase in local visitors, most likely associated with the contraction in the number of holidays taken away from home.



NET:
Up - Down

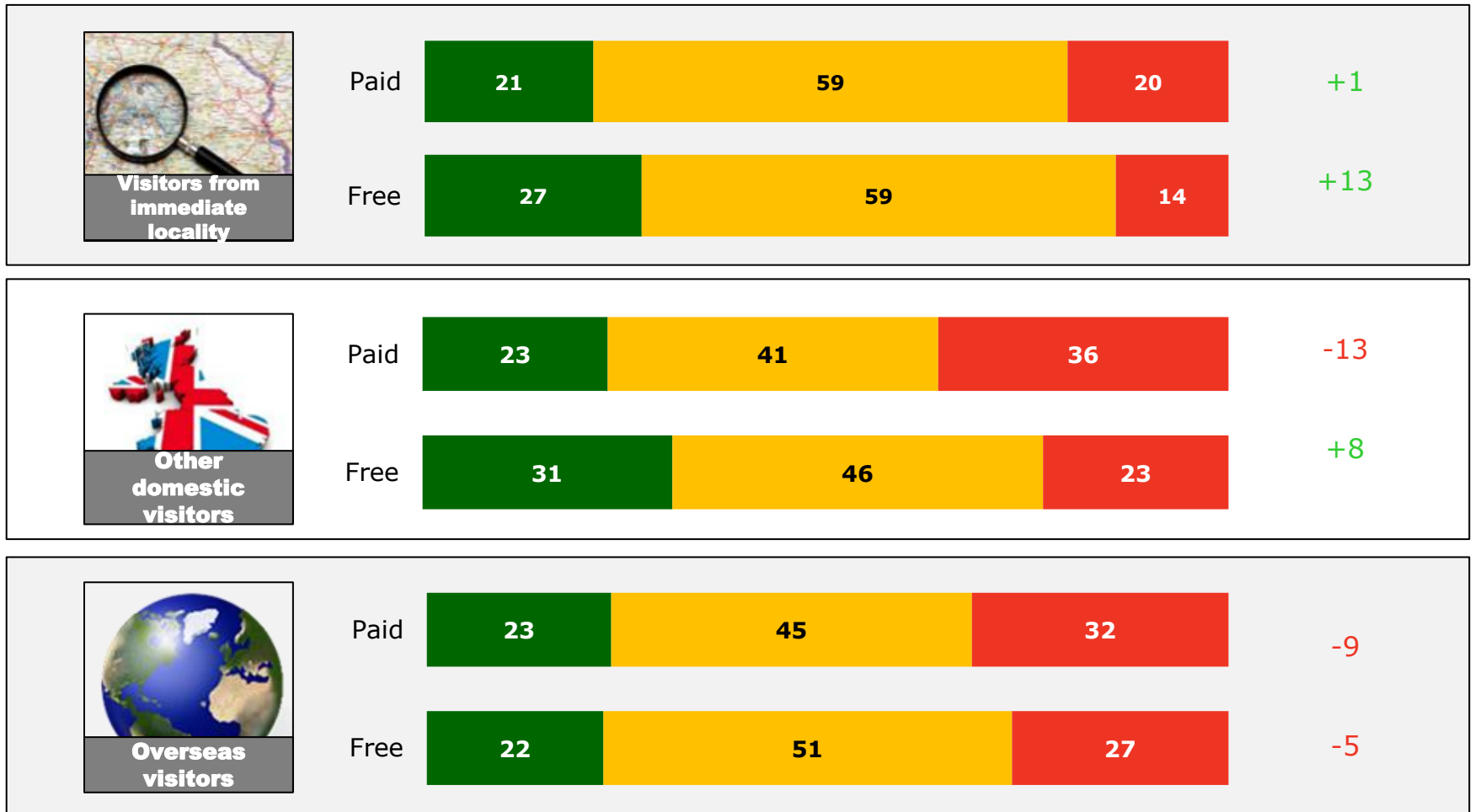


Changing Visitor Profile (year-to-date vs. previous year): Charging

As may be expected in the poor economic climate, free attractions are faring better than paid attractions, although this is less marked amongst overseas visitors.

■ Up
 ■ Same
 ■ Down

**NET:
Up - Down**

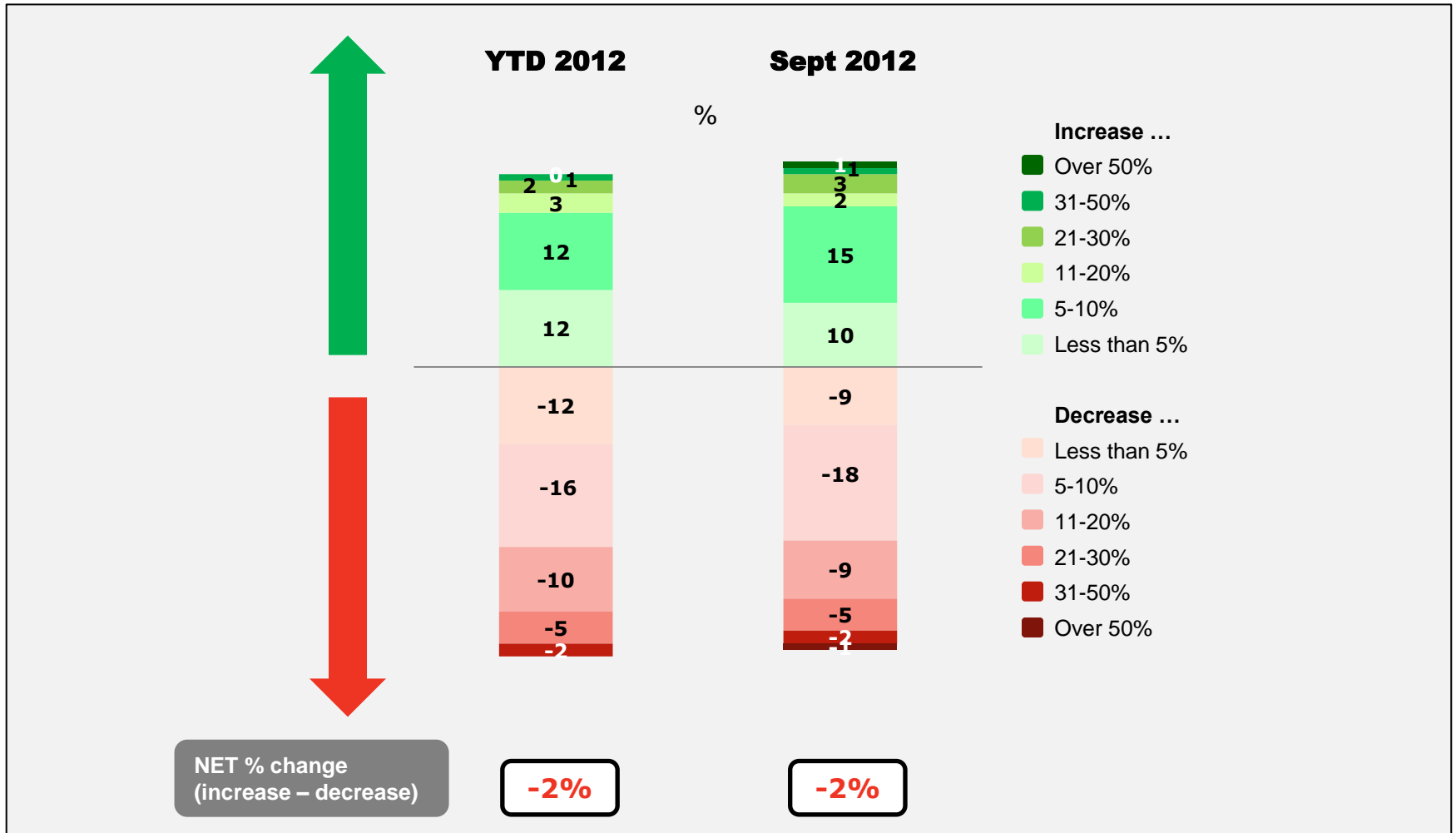


Past performance



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

Visitor numbers are reported as down by 2% in total over the summer holidays, which is an improvement on June-July when a 5% decline in admissions was reported.



Positive verbatim comments on business performance

“

I think weather was a big factor for us because we are an under cover attraction. We've increased our attractions as well, by three more this year. We've also increased marketing and targeted local papers and online marketing as well.

A general increase in tourism.. well there was people coming in for the Olympics and we're in London so picked up some of that trade.

We've had more special events to get more people in. The weather has gone in our favour - the more rain there is, the more people we get as an indoor attraction.

We have a new restaurant - that's brought in quite a lot of people and visitors. The economy also works in our favour - because people have less money to spend, our numbers of visitors have increased due to free admission.

Winning the VisitEngland small attraction of the year award and an increase in PR around that have had a positive impact on visitor numbers

The weather i.e. We're an undercover-free site so bad weather or unpleasant weather means more visitors

”

Negative verbatim comments on business performance

“

Purely the weather – our site is an 8 mile walk from the nearest cover from the weather and people do not like walking when it's raining.

Being an outdoor attraction, we rely on the weather, and we've had a very wet season this year, which has affected visitor numbers.

We are an admission charged attraction. Because of fuel cost of getting here, most people would rather go to a free attraction.

The cost of transport to the island is very high. People are put off by that. Also several bank holidays and the Olympics. People are taking shorter breaks as well.

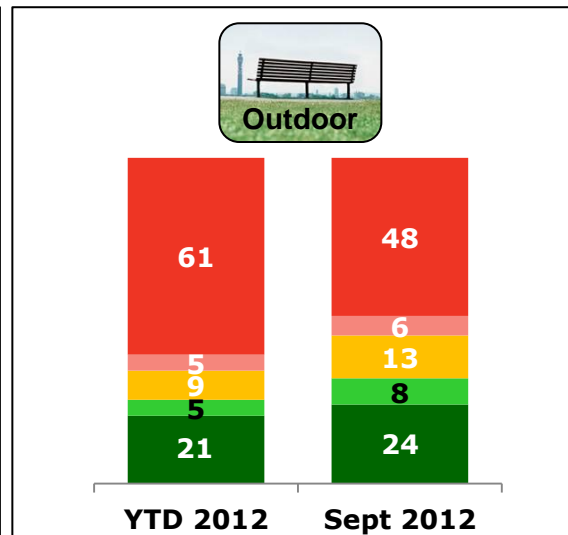
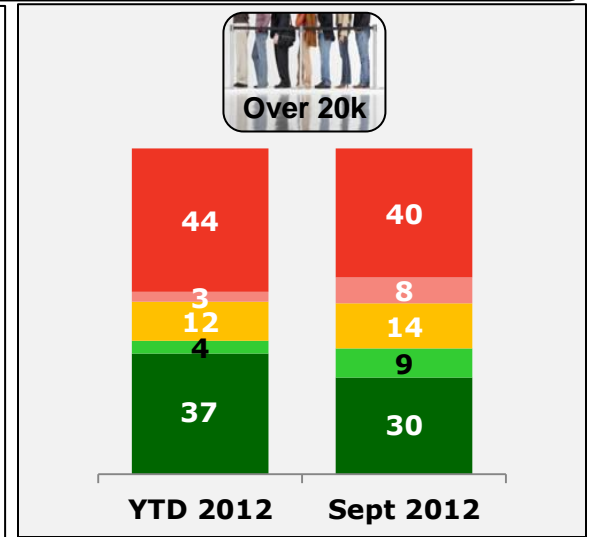
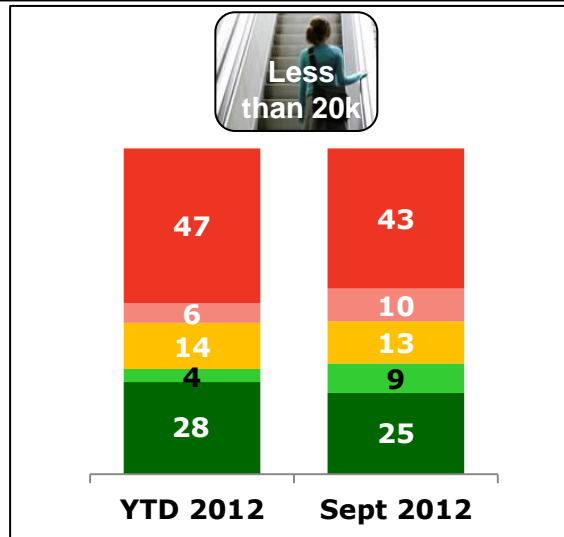
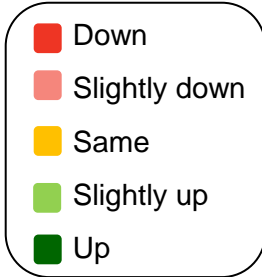
We found that most people were watching the Olympics rather than visiting attractions. I was the same! I think the recession has also had an impact - we have got a little tiny shop and we found that our takings are down.

The weather i.e. it's been pretty appalling this year and as of August, we are going into a quieter period so people have not really been at the garden.

”

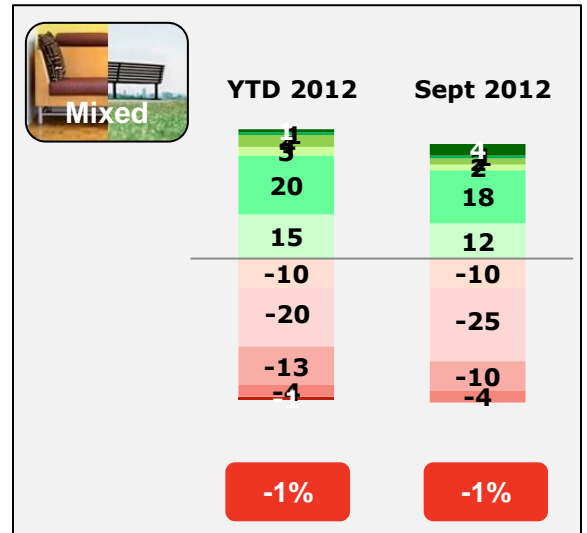
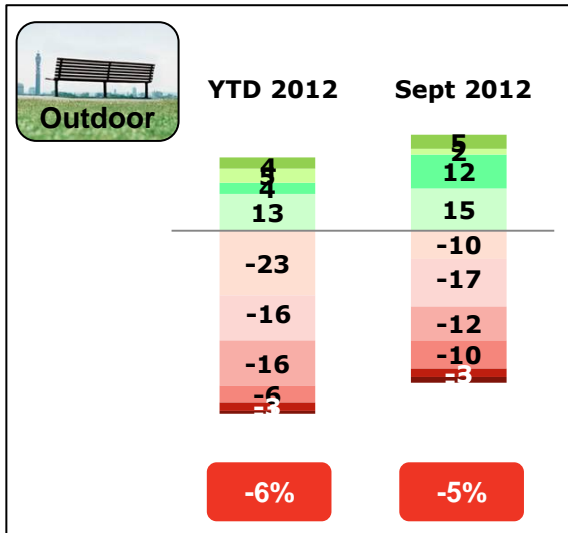
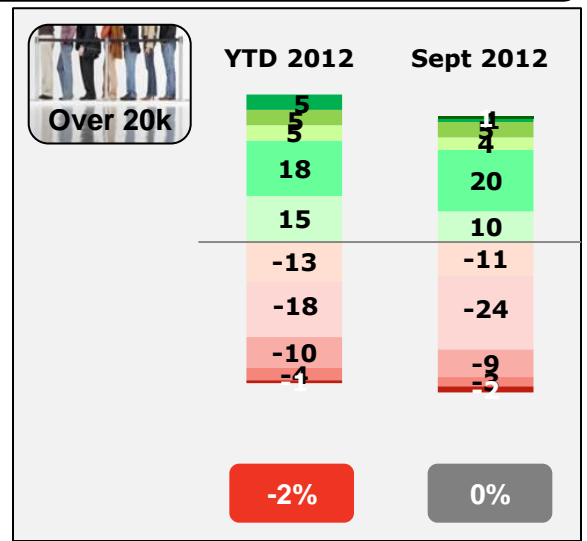
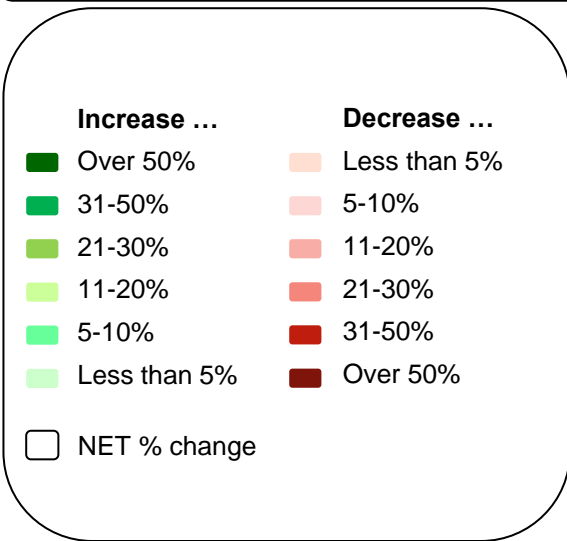
Visitor numbers: Year-on-year changes by attraction type

Over the course of 2012 so far, mixed indoor/ outdoor attractions have proved the most resilient, with outdoor only attractions suffering the most.



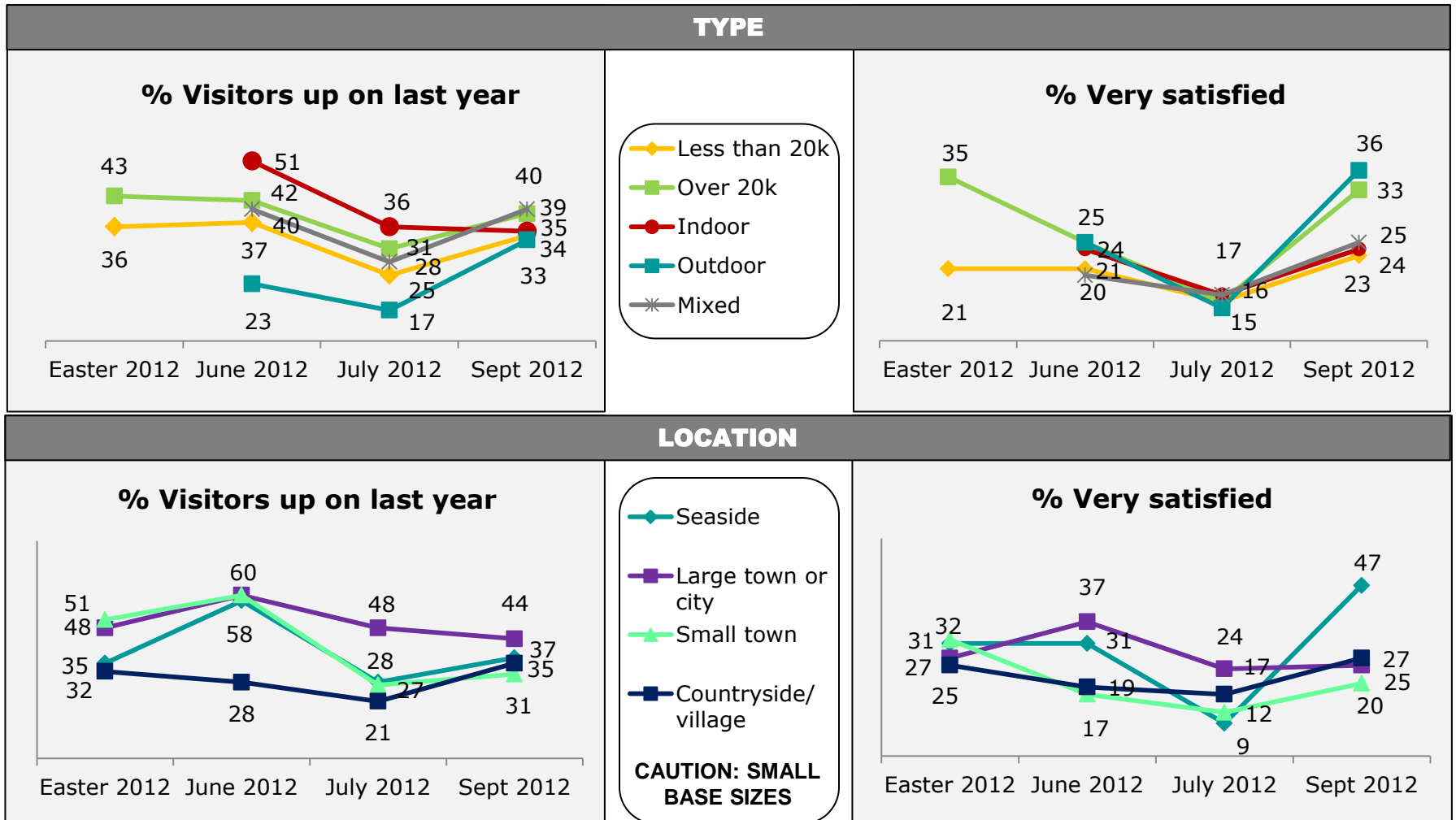
Visitor numbers: Degree of year-on-year changes by attraction type

Larger attractions (with over 20,000 visitors) have managed to equal last year's admissions over the summer period. However, visitors to smaller attractions are still down by an average of 4%.



Changing business performance: By attraction type & location

Overall the picture is starting to look more positive, with an improvement in business performance for most types of visitor attractions – in particular those outdoors. Satisfaction amongst outdoor and seaside attractions has jumped significantly in association with this.

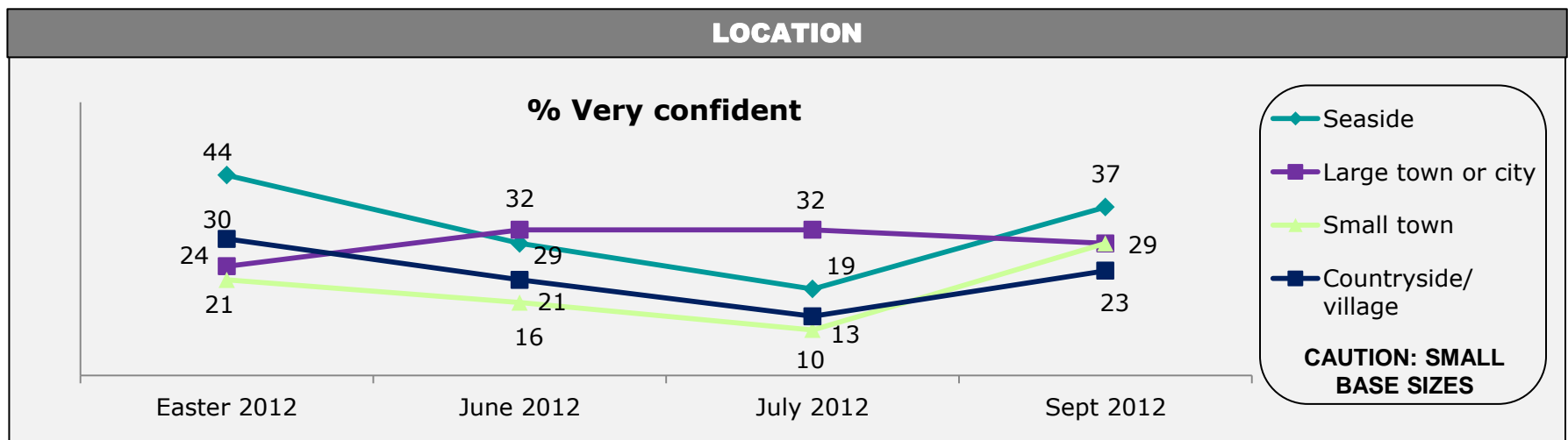
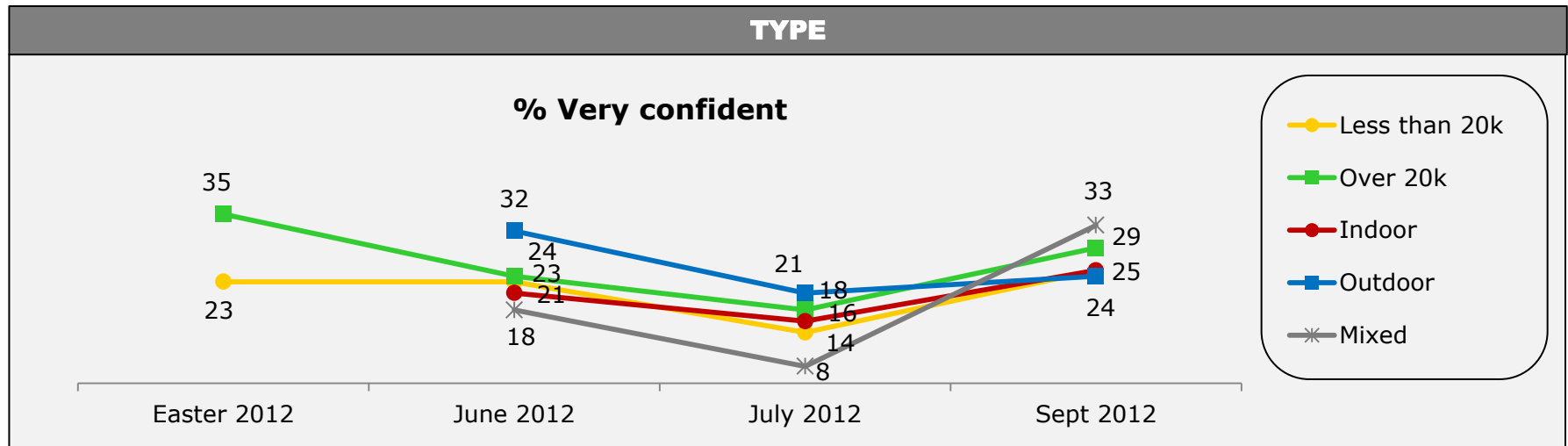


Future performance



Confidence for forthcoming period: Attractions

Recent improvements in visitor admissions seem to have bolstered confidence amongst attractions, in particular those with both indoor and outdoors elements on offer.



Positive verbatim comments on business confidence

“

Our season ends in November and our bookings are looking quite buoyant. I think offering value for money and a consistent attraction is key to this.

We are quite confident for business in the coming months. There will be a lot of promotion around our area that will be televised which we will benefit from. We also have school groups that are consistent for us and this should continue.

I think it's going to be a hard winter financially for many people because disposable income is going to be stretched and the economy isn't going to improve dramatically in the next few months but we are a free attraction so will be attractive.

It's looking very good. We are doing more and catering for more kinds of people.

We're continuing to grow. We're going upwards and onwards. Just looking at new attractions and the very positive feedback we get from our visitors.

Very positive. The new visitor centre is a big plus for us, I think the fact that it has stopped raining is a positive and I think it is time to be more upbeat and optimistic after the success of the Olympics.

”

Negative verbatim comments on business confidence

I don't know quite how long the numbers have been down, but it's not just that. They haven't been spending as much money inside the attraction either.

We have six weeks to go before we close for the season so we do not expect numbers to go up at this stage.

We have seen a significant downfall in school groups - due to the insurance of health and safety.

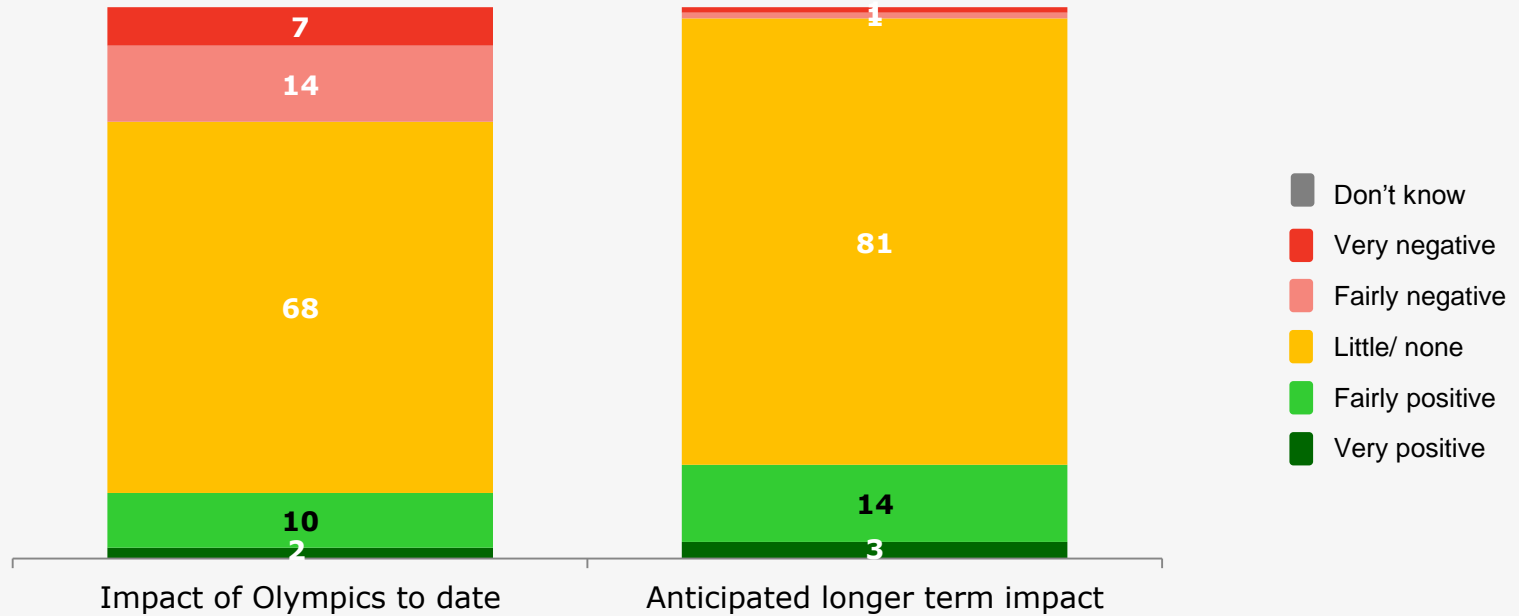
I can't see the economy moving and people have got less money to spend.

Things will get worse before they get better. The Olympics boost has not materialised.

I think it is a difficult end of the year, I think we may well do the same as last year but it won't help us recover the losses at the beginning of the year that we suffered due to the rainy weather.

Impact of 2012 Olympics

Overall the Olympics is thought to have had a slightly negative impact on visitor numbers in the short term, but could have a positive impact longer term.



Verbatim comments on: the impact of the Olympics to date

“

POSTIVE COMMENTS

A positive impact, due to the enthusiasm of both tourists and British people themselves

Our attraction is close by to the Olympic park so I think geographically we had an up turn and we extended our opening hours so we received more guests as a result of that and the general feel good factor was a good influence on people throughout this summer

We have merchandise in the shop which reflected the Olympics and did Olympic themed family activities.

NEGATIVE COMMENTS

It was very negative during and then it bounced back afterwards. There are two reasons why: British people staying in to watch it and international visitors who didn't think that they would get into the country

We experience the same downturn during Wimbledon: whenever there's a big sporting event on the TV nobody comes out

The Olympics have affected us a lot. The number of visitors has been down in London because of the Olympics.

”

Verbatim comments on: the Olympic legacy

“

POSTIVE COMMENTS

I'd expect it to have a positive impact, because that's the experience of other host cities.

I think the feel good factor that's come from the Olympics will increase confidence so the people will spend more money.

The Olympics has been a huge success, and showcased England to the world, so hopefully people will come back to explore.

I think the Olympics has done quite well in advertising the country as a whole. and I think that it will encourage more overseas visitors to visit the country and for UK residents to holiday at home.

It would be very good for business overall, certainly for London because of all the television coverage it was great showcase for brand GB.

”



Performance and confidence snapshot: September 2012

		Visitor Numbers (September)			Visitor Numbers (Year-to-date)			Confidence (End of October)	
		Up	Same	Down	Up	Same	Down	Very	Very / fairly
TOTAL (%)		36	13	51	36	13	51	27	85
Visitor numbers per annum (%)	Less than 20k	34	13	53	32	14	53	25	86
	20k or over	39	14	48	41	12	47	29	86
	20k-50k	44	16	40	54	13	33	31	86
	50k-100k	22	21	56	18	15	67	23	79
	Over 100k	43	6	53	39	11	54	33	92
Type (%)	Indoor	35	15	50	37	19	43	25	85
	Outdoor	33	13	54	26	9	65	24	89
	Mixed	40	11	49	43	9	48	33	86
Charge (%)	Paid	34	11	55	33	9	57	28	88
	Free	40	19	41	43	21	36	25	80
VAQAS (%)	Yes	38	11	51	36	10	54	32	89
	No	35	14	50	36	15	48	25	84
Location (%)	Seaside	37	16	47	28	16	56	37	88
	Large town / city	44	16	40	49	15	35	29	92
	Small town	31	16	53	40	14	46	29	83
	Rural	35	10	55	32	11	57	23	83