VisitEngland

Visitor Attraction Trends in England 2016
Full Report

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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 and The National Trust as well as several Destination Management Organisations, councils and museum / attraction groups. Where relevant this has been referenced in the report.

Statistics in this report are given in good faith on the basis of information provided by proprietors of attractions and relevant organisations. VisitEngland regrets it cannot guarantee the accuracy of the information contained in this report nor accept responsibility for error or misrepresentation.

VisitEngland is grateful to Historic England for their financial support for the 2016 survey.

July 2017

Historic England

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

VisitEngland tightened its definition and undertook a major review of attractions used for the 2013 survey.

For example, parish churches and small art galleries with a retail focus were removed from the attractions list.

This removed a number of small sites previously classified as attractions, and we therefore saw a slight shift in the attraction size profile of sites participating in the research in 2013.

Further, whilst country parks continue to be included in the survey findings, they have generally been excluded from the most visited lists on the basis that it is not possible to exclude those who have visited the park in such a way that falls outside our visitor attraction definition.

VisitEngland no longer rigorously monitors attractions openings and closures. The England attractions database was therefore updated in 2015 using Experian business data. This data was de-duplicated against the existing attractions database.

5,410 English visitor attractions were invited to take part in this year's survey.

1,545 English visitor attractions responded to the survey in 2017, each providing 2016 visitor numbers:

- 847 completed online
- 344 completed by post
- 354 provided data through umbrella organisations

1,494 attractions provided admissions for both 2016 and 2015 and these attractions form the basis of this report's visitor trend evaluation.

Sample and Response (1)

Response by attraction category

Category	No. attractions providing data for 2015 & 2016	Profile of attractions providing data	
		2015	2016
Country Parks	80	*3%*	*5%*
Farms	34	*3%*	*2%*
Gardens	80	*6%*	*5%*
Historic Properties	498	*33%*	*33%*
Leisure / Theme Parks	31	*2%*	*2%*
Museums / Art Galleries	465	*33%*	*31%*
Steam / Heritage Railways	38	*2%*	*3%*
Visitor / Heritage Centres	86	*6%*	*6%*
Wildlife Attractions / Zoos	73	*7%*	*5%*
Workplaces	18	*2%*	*1%*
Places of Worship	61	*3%*	*4%*
Other	30	*3%*	*2%*
Total	1,494		

Sample and Response (2)

Response by region

Category	No. attns. giving 2015 & 2016 data	Profile of attractions providing data	
		2015	2016
North West	158	*10%*	*11%*
North East	85	*6%*	*6%*
Yorks/Humber	155	*11%*	*10%*
East Midlands	146	*9%*	*10%*
West Midlands	139	*8%*	*9%*
East	166	*13%*	*11%*
London	103	*7%*	*7%*
South East	281	*19%*	*19%*
South West	261	*17%*	*17%*
Total	1,494		

Response by attraction size and admission type

Category	No. attns. giving 2015 & 2016 data	Profile of attractions providing data	
		2015	**2016**
Annual Visits			
10,000 or less	456	*32%*	*31%*
10,001–20,000	177	*14%*	*12%*
20,001–50,000	308	*19%*	*21%*
50,001–100,000	163	*11%*	*11%*
100,001–200,000	141	*10%*	*9%*
Over 200,000	249	*15%*	*17%*
Total	1,494		
Admission			
Free	551	*37%*	*37%*
Paid	943	*63%*	*63%*
Total	1,494		

Headlines - admissions

Attractions reported a **2% annual increase** in total visits to visitor attractions in 2016 (adults and children). This is consistent with the level of growth seen in 2015, but slower than in 2013 and 2014 when attractions benefited from a post 2012 London Olympics surge in overseas visits to attractions (overseas attraction visits were up by 10% in 2013 and 8% in 2014).

In contrast, **overseas visits to attractions in 2016 declined by 3%.** During the same period international visits to England actually increased by 4%, according to the International Passenger Survey. However, the average length of stay and average spend both reduced (down by 3% and 2% respectively), which may have limited attraction visiting.

Day tripper visits to attractions remained stable, with growth continuing at 4%. This was supported by growth in domestic holidays (both stand alone, and holidays staying with friends & relatives) of 2% in 2016 (Source: Great Britain Tourism Survey).

There was **significant variation in the annual change in visitor admissions across the different attraction categories.** Gardens, (+8%) wildlife attractions/ zoos (+8%) and historic houses/ castles (+7%) performed well, no doubt helped by a slightly warmer, sunnier climate in 2016. Other categories saw declines in visitor admissions: places of worship (-8%), visitor/ heritage centres (-2%), museums/ art galleries (-1%) and other historic properties (-1%). The fall in admissions for places of worship was largely driven by a few big sites based in London.

Other notable areas of decline in visitor admissions were London (-1%), the only region to report a drop, and **small attractions with 20,000 visits or less (also down by 1%).**

Schoolchildren admissions decreased for a third consecutive (each year declining by 1%). This is having a knock-on effect on the overall performance of attractions that rely on school visits.

Headlines – revenue, admission pricing & additional income generating activities

Gross revenue at visitor attractions increased by an average of 7% in 2016, higher than the 5% increase in each of the previous three years. All categories of attraction increased their revenue in 2016 with the exception of places of worship (down 1%). No correlation was found between changes in adult admission prices and gross revenue in 2016, suggesting that some sites may have reached the tipping point in admission pricing, where visitor volume contracts as a result of increasing entrance fees.

On average, **adult admission fees at charging attractions increased by 6%** in 2016, following price rises of 4% in each of the previous 3 years. This rise in adult admission fees in 2016 is **significantly higher than the rate of inflation over the same period (1.7%,** Source: Bank of England).

A **growing proportion of attractions with adult admission fees also charge for child entry** (89% in 2016, up from 86% in 2015), and the entrance fee for children increased by 4% in 2016, following a 10% rise in 2015.

There has been **little change in the provision of additional income generating activities.** The **exception is 'lates' or unusual opening hours, which 29% of attractions now offer** (vs. 21% in 2015). While larger attractions are more likely to offer additional activities, significant proportions of smaller sites also do so, and attractions across all categories, demonstrating that none of the activities are off limits for any particular attraction type. **Extended provisions were associated with revenue growth and increases in permanent/ temporary staff.**

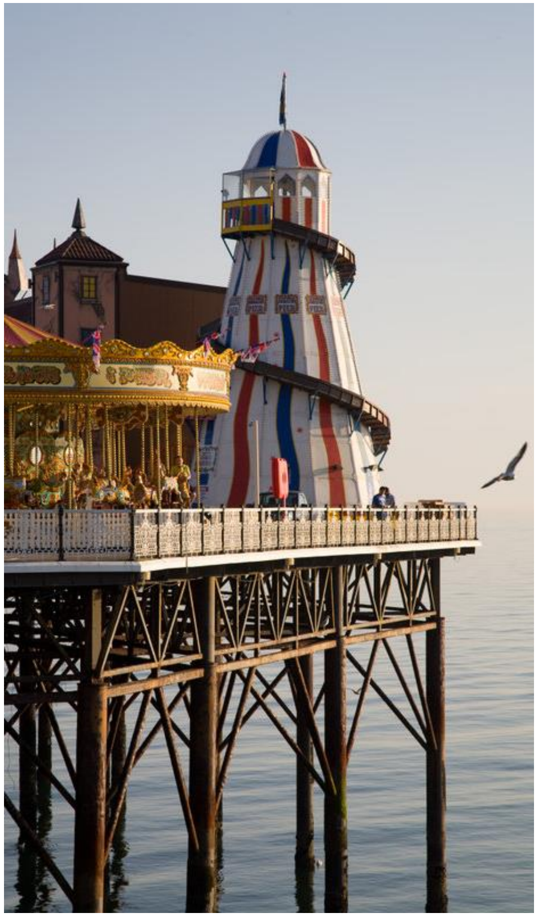
Headlines – marketing, digital communication, employment & transport

Marketing spend at attractions is increasing – 2016 saw a net increase of +7% (18% increasing spend – 11% decreasing). This is slightly lower than the net increase of +10% in 2015, but a significant improvement on 2012 (+1% net increase). Consistent with previous years, **attractions that reported an increase in their marketing spend were more likely to increase their total admissions and gross revenue.**

Use of digital communications accelerated in 2016. Provision of a website is now almost universal (95%) and **online booking facilities are offered by 38%** of attractions (increasing from 29% in 2015). **Image sharing sites (Instagram/ Pinterest) saw the biggest growth,** with attraction use increasing by 64%, with over a third of sites now using these communication platforms.

Cars/ motorbikes are used by the majority (around two thirds) of visitors travelling to attractions. Public transport is used more in urban locations, particularly in London, while coach trips are more likely to be used to travel to attractions based in rural and coastal settings.

Employment within the attractions sector was fairly buoyant in 2016, with at least three times as many attractions increasing their permanent and seasonal staffing levels as those reducing. **This trend for growth looks set to continue into 2017**, with 11% of attractions anticipating an increase in permanent and seasonal staff. The **trend of recruiting unpaid volunteers is also continuing,** with these staff up by 20% in 2016 and expectations for growth to continue at a similar pace in 2017.



2016 UK Weather Summary
(source: Met Office)

The majority of 2016 was warmer than average for the UK as a whole. The year was slightly sunnier than average for many areas, although no individual regions deviated by as much as 10% above the long-term average. Total rainfall was also slightly lower than the long-term average.

Winter 2016: January was a dull month across many areas, particularly in the west. February was a sunny month for most, with some bright, sunny spells particularly during the second half of the month.

Spring 2016: Temperatures averaged out to be equal to the long-term average for the season. Temperatures were slightly below average over southern areas in March, and rather below average for the whole country in April. However, May was around a degree above average for all parts of the UK.

Rainfall in Spring 2016 was unexceptional overall. However, March was a wet month in southern and eastern parts with over 150% of average in many areas. All three Spring months saw above-average sunshine levels.

Summer 2016: The average temperature for the summer was 14.9 °C, which is 0.6 °C above the long-term average. Summer rainfall totals were also above average for most areas, with the exception of southern England. June was exceptionally wet in East Anglia and the south-east with some areas having more than twice the normal rainfall.

Autumn 2016: September was a notably warm month, with unusually high temperatures for the time of year in south-east England. October was very dry with frequent easterly winds. Overall, temperatures were near average – with a mean temperature for the autumn of 9.8 °C (0.3 °C above the long-term average).

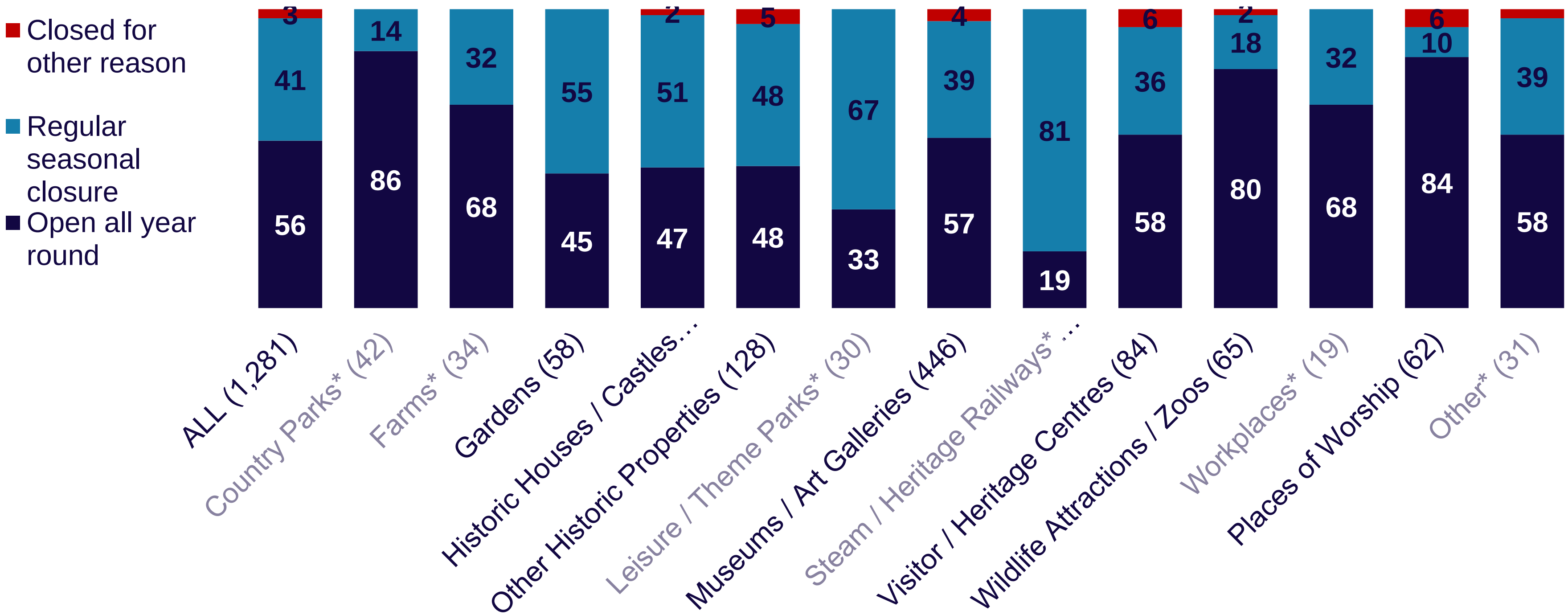
Attraction opening – by attraction category

56% of attractions remained open throughout 2016, consistent with last year (54%). As seen in previous years, country parks, places of worship and wildlife attractions are the most likely to remain open all year round.

Steam and heritage railways reported an increase in the proportion staying open throughout the year, but remain by far the most seasonal type of attraction. In contrast, leisure and theme parks were less likely to be open all year round when compared to 2015, with two thirds of these attractions now opening seasonally.

3% of attractions were closed for 'other' reasons (such as restoration), a similar proportion to previous years.

% open all year in 2015 ^	**54**	**88**	**67**	**41**	**43**	**42**	**46**	**56**	**11**	**52**	**81**	**65**	**88**	**67**



Base: All attractions answering (1,281)

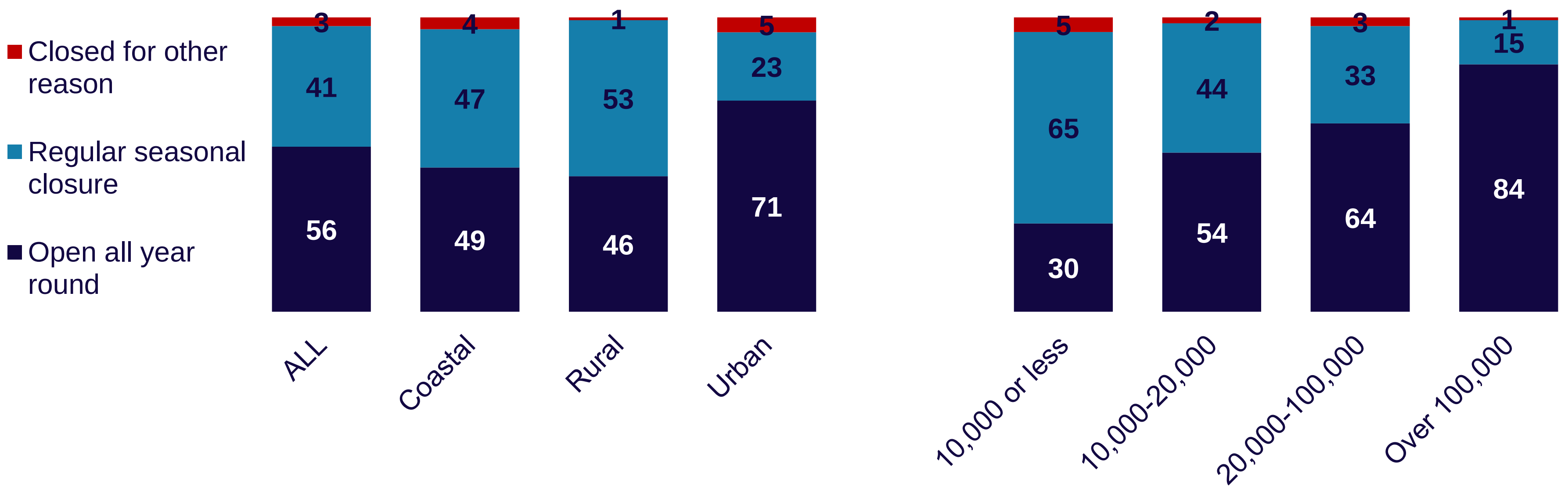
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.
**Base size below 50 (greyed out)*
^Underlined scores indicate 2016 % 'open all year round' significantly different from 2015

Attraction opening – by destination type & attraction size

Attractions based in urban locations (71%) were significantly more likely to stay open for the whole of 2016 than those based in rural and coastal parts of England (46% and 49% respectively).

There is a direct correlation between attraction size and the likelihood of the site staying open all year round. Nearly two-thirds (65%) of smaller attractions (with 10,000 visitors or less) had a regular seasonal closure, with only 30% remaining open for the whole year, while 84% of large attractions (100,000 visitors or more) remained open throughout 2016.

% open all year in 2015	ALL	Coastal	Rural	Urban	10,000 or less	10,000-20,000	20,000-100,000	Over 100,000
	54	54	45	67	30	51	62	84



Base: All attractions answering (1,281)

VisitEngland

Visitor admission trends

Overall visitor admission trends

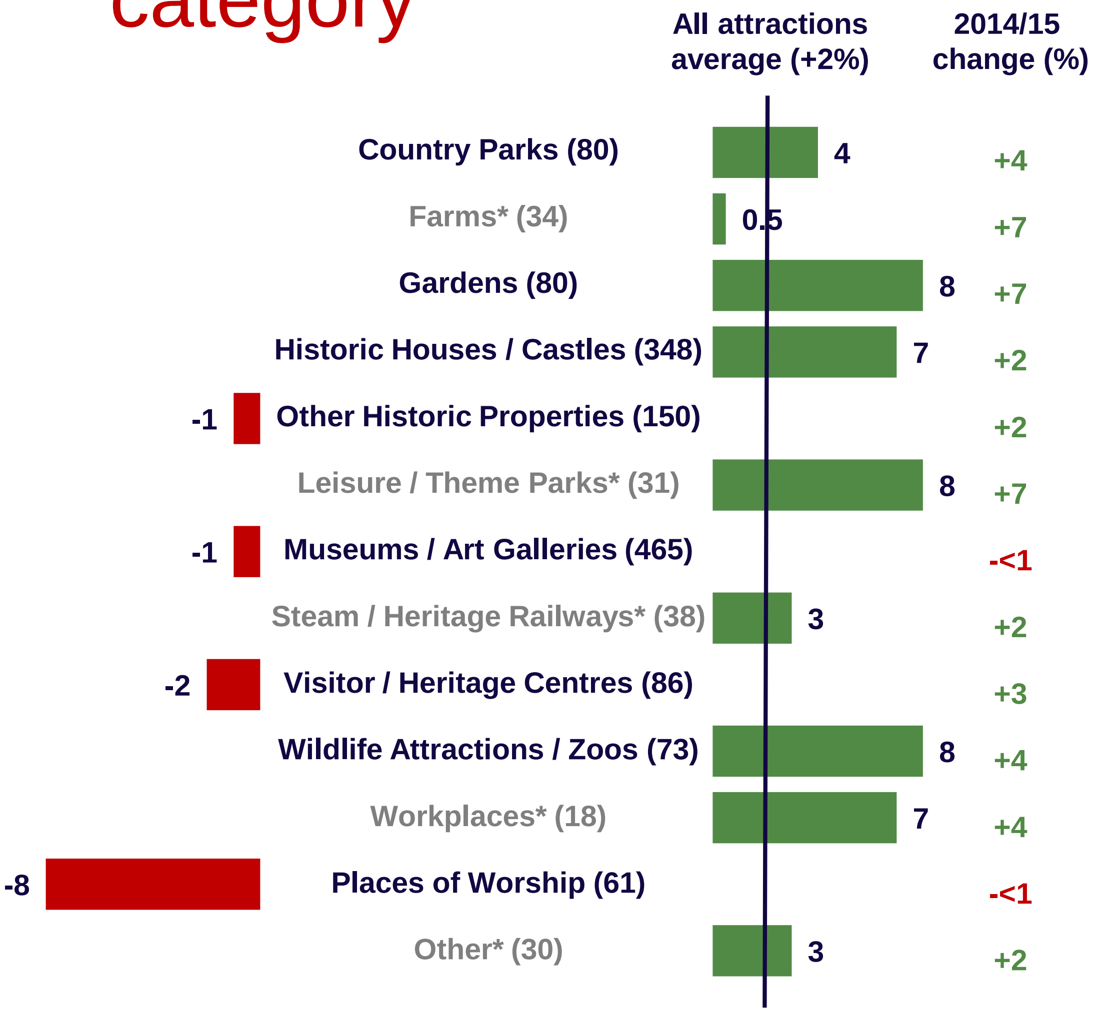
Overall, attractions in England reported a **2% annual increase** in total visits in 2016, on a par with 2015.

This slow down in growth since 2013 and 2014 is driven by a decrease in visits to London attractions, which fell by 3% in 2015 and 1% in 2016. A fall in overseas visits of 3% compared with 2015 no doubt contributed to the decline in London based attraction visits.

The decrease in overseas visitors was softened by an increase in day visits in England, which rose by 4% in 2016 (source: Great Britain Day Visits Survey).

Base: All attractions providing visits data for current and previous year (1,494 in 2016)

Visitor admission trends 2016 – by attraction category



Outdoor attractions generally performed well, tallying with the slightly drier, warmer than average weather for most of the year. Wildlife attractions / zoos (8%), gardens (8%) and historic houses/ castles (which often have extensive gardens) (7%) and country parks (4%) all saw above average increases in visits.

Visitor numbers for museums / art galleries and places of worship both fell back for the second consecutive year. Whilst the drop for museums / art galleries is minimal (down 1%), places of worship suffered a more substantial fall in visitors of 8% in 2016. This fall is driven by some of the larger places of worship, especially in London.

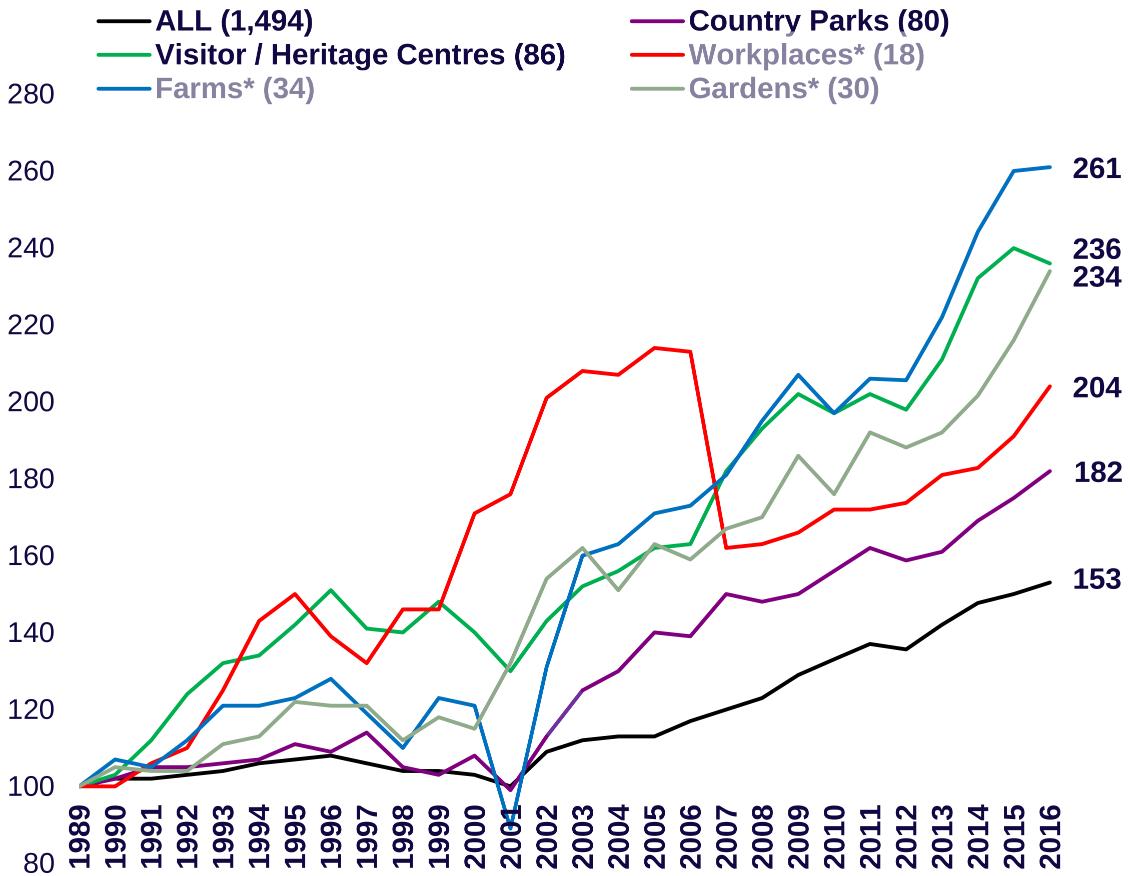
Index of visits to attractions - calculation

The charts presented on slides 16 and 17 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.

Index of visits to attractions – sectors **outperforming** market



This chart shows the attraction categories which have shown above average annual visit increases since 1989**. Across England attractions as a whole ('all'), visits have increased by over 50% in that time (index of 153).**

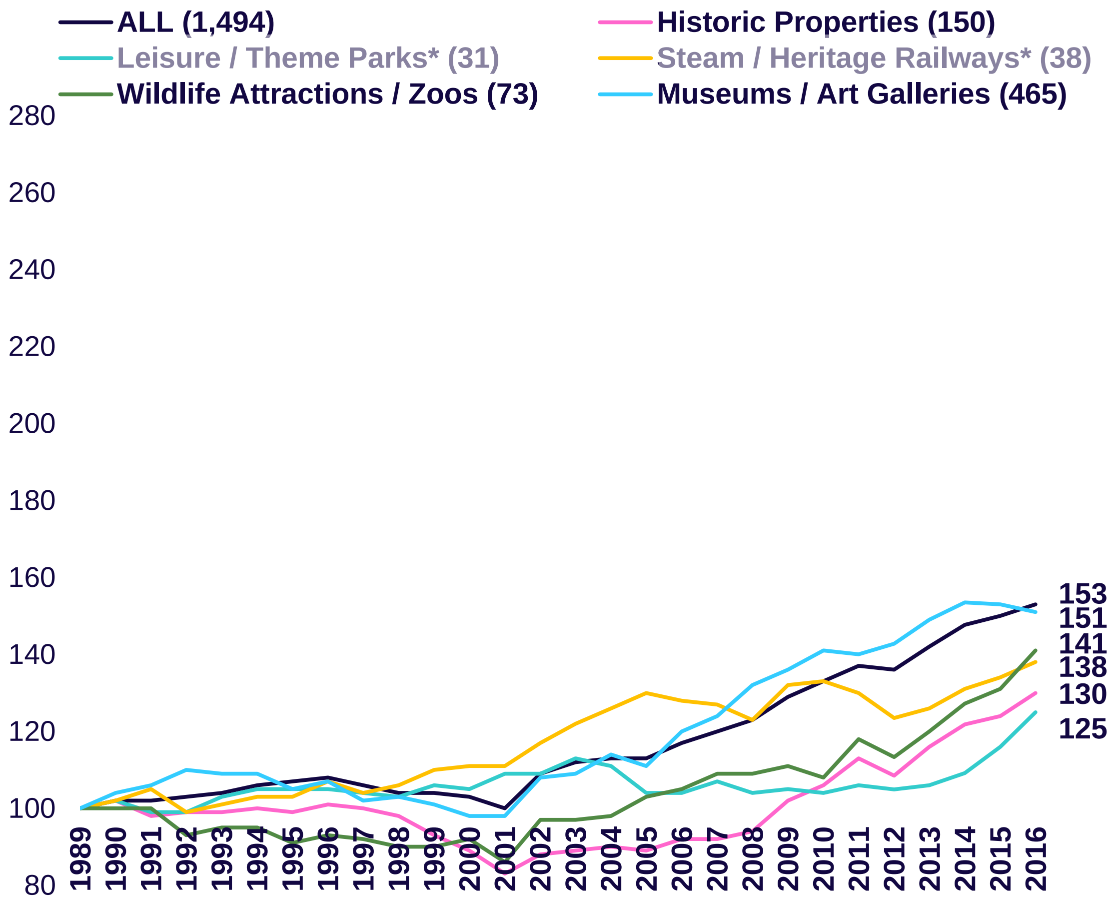
In 2016, gardens saw the largest increase in visits of any attraction type. Visits to gardens have been growing rapidly since 2013.

Overall, 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 have also seen a strong increase in that time.

Country parks also experienced a strong increase in 2016, growing at a faster rate than the average for all attractions in England.

Base: All attractions providing visits data for both 2015 and 2016 (1,494).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Index of visits to attractions – sectors **underperforming** against market



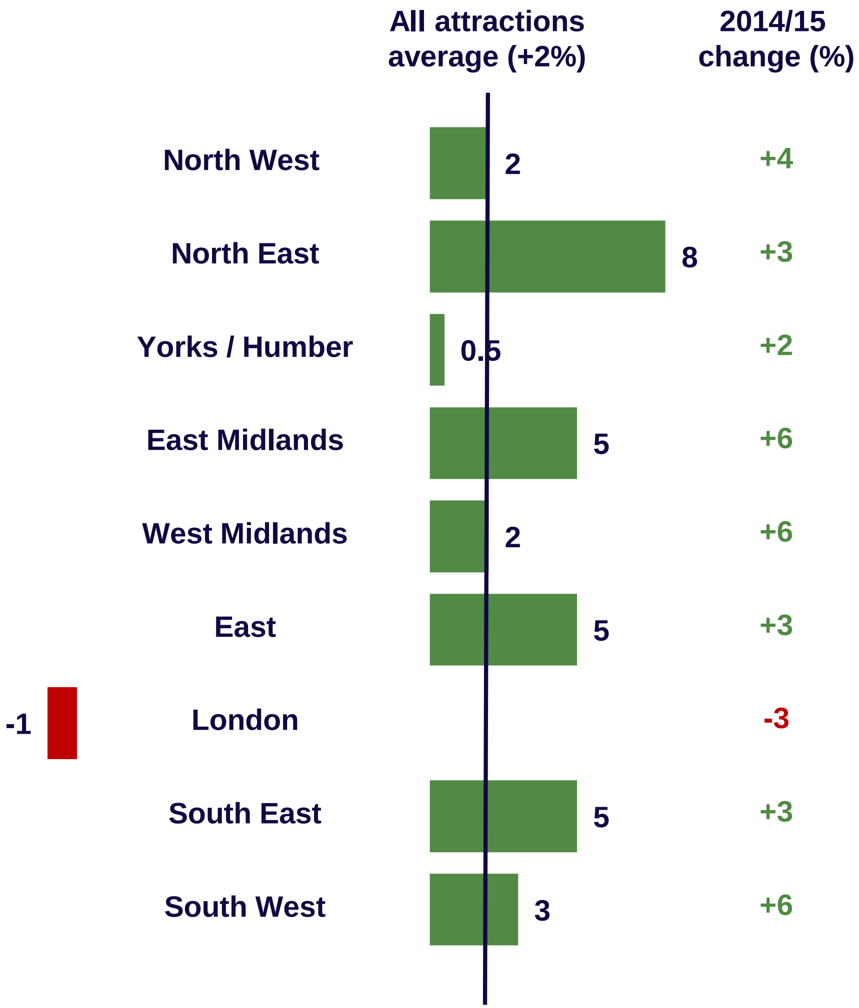
2016 was a generally positive 12 months for underperforming sectors, with four of the five increasing at a faster rate than the attractions sector average.

The exception to this was museums / art galleries, which fell below the average level of growth of all attractions for the first time since 2005, due to an index fall for the second consecutive year (down from 153 in 2014, to 151 in 2016).

It was another positive year for wildlife attractions/ zoos, which reported an 8% increase in visitors in 2016, marking the 4th consecutive year of growth (with its index rising from 113 in 2012, up to 141 in 2016).

Base: All attractions providing visits data for both 2015 and 2016 (1,494).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Visitor admission trends 2016 - by region



With the notable exception of London, all regions experienced increased visitor numbers during 2016.

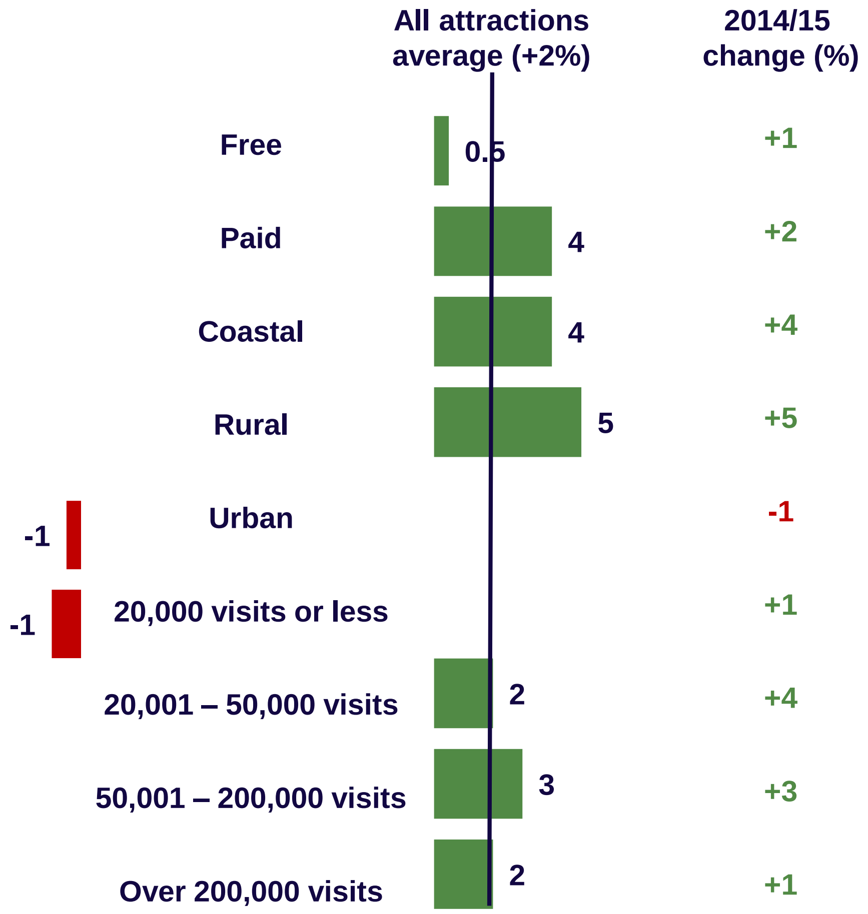
Eastern parts of England fared particularly well, with the North East (8%), East (5%), East Midlands (5%) and South East (5%) regions seeing growth well exceeding the overall average.

Growth rates did slow in other areas: in the South West it halved compared with the previous year (3% in 2016, down from 6% in 2015), whilst growth in the West Midlands and Yorkshire/ Humberside reduced by an even greater extent.

Visitors to London have contracted for 2 years running (down 1% in 2016 and 3% in 2015), following a post-Olympic boost in visitors in 2013 (+8%) and 2014 (+2%).

Base: All attractions providing visits data for both 2015 and 2016 (1,494)

Visitor admission trends 2016 – by admission charge, geographic location and size



The 2% average visitor admissions increase is driven by paid sites (4%), which were over four times as likely to report growth compared with free sites (<1%).

Attractions in urban locations saw a minor decline in visitors (<1%), mainly driven by the drop in visits to London sites. In contrast, coastal and rural attractions reported strong growth, at similar levels to 2015.

Despite the decline in London attractions, larger attractions tended to fare better than their smaller counterparts. Attractions with more than 50,000 visitors saw a light increase in their rate of growth compared with 2015. However, growth rates halved amongst sites with 20-001 – 50,000 visitors, and visitor numbers declined in smaller sites (with 20,000 visitors or less).

Base: All attractions providing visits data for both 2015 and 2016 (1,494)

Visitor admission trends 2016 – paid and free attractions

Free attractions reported a negligible increase in visits overall (<1%) in 2016. This was limited by a decline of visits in the museums/ art gallery category (-2%), which is by far the largest free attraction. Please note the very low sample sizes amongst the free attraction categories reporting large increases (steam/ heritage railways and leisure/ theme parks).

Paid attractions experienced a 4% increase in visits in 2016, with notable increases from gardens, wildlife attractions / zoos and historic houses / castles.

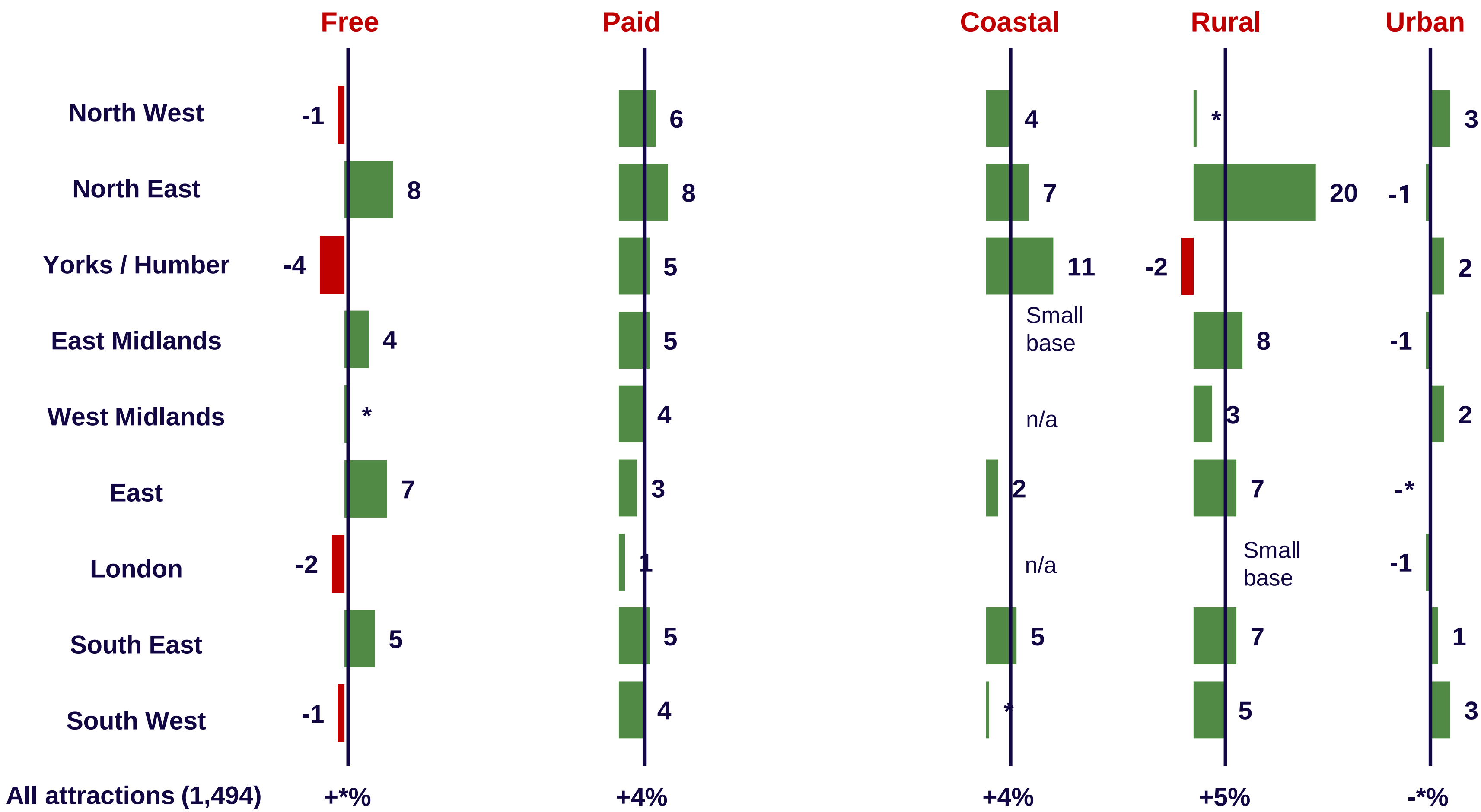
Free Attractions	2015 / 16 change (%)	2014 / 15 change (%)
ALL FREE ATTRACTIONS (549)	*	+1
Country Parks* (49)	2	+5
Farms* (12)	-*	+10
Gardens* (5)	*	+30
Historic Houses / Castles* (23)	4	-4
Other Historic Properties* (37)	-6	+4
Leisure / Theme Parks* (7)	21	+17
Museums / Art Galleries (272)	-2	-1
Steam / Heritage Railways* (2)	31	+15
Visitor / Heritage Centres (50)	1	+2
Wildlife Attractions / Zoos* (21)	7	+1
Workplaces* (6)	5	+11
Places of Worship (53)	-1	+10
Other* (12)	4	+2

Paid Attractions	2015 / 16 change (%)	2014 / 15 change (%)
ALL PAID ATTRACTIONS (945)	4	+2
Country Parks* (31)	20	-6
Farms* (22)	1	+5
Gardens (75)	9	+6
Historic Houses / Castles (325)	7	+2
Other Historic Properties (113)	-*	+2
Leisure / Theme Parks* (24)	1	+4
Museums / Art Galleries (193)	2	+3
Steam / Heritage Railways* (36)	3	+1
Visitor / Heritage Centres* (36)	-6	+5
Wildlife Attractions / Zoos (52)	8	+4
Workplaces* (12)	7	-2
Places of Worship* (8)	-12	-6
Other* (18)	3	+3

Base: All attractions providing visits data for both 2015 and 2016 (1,494)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

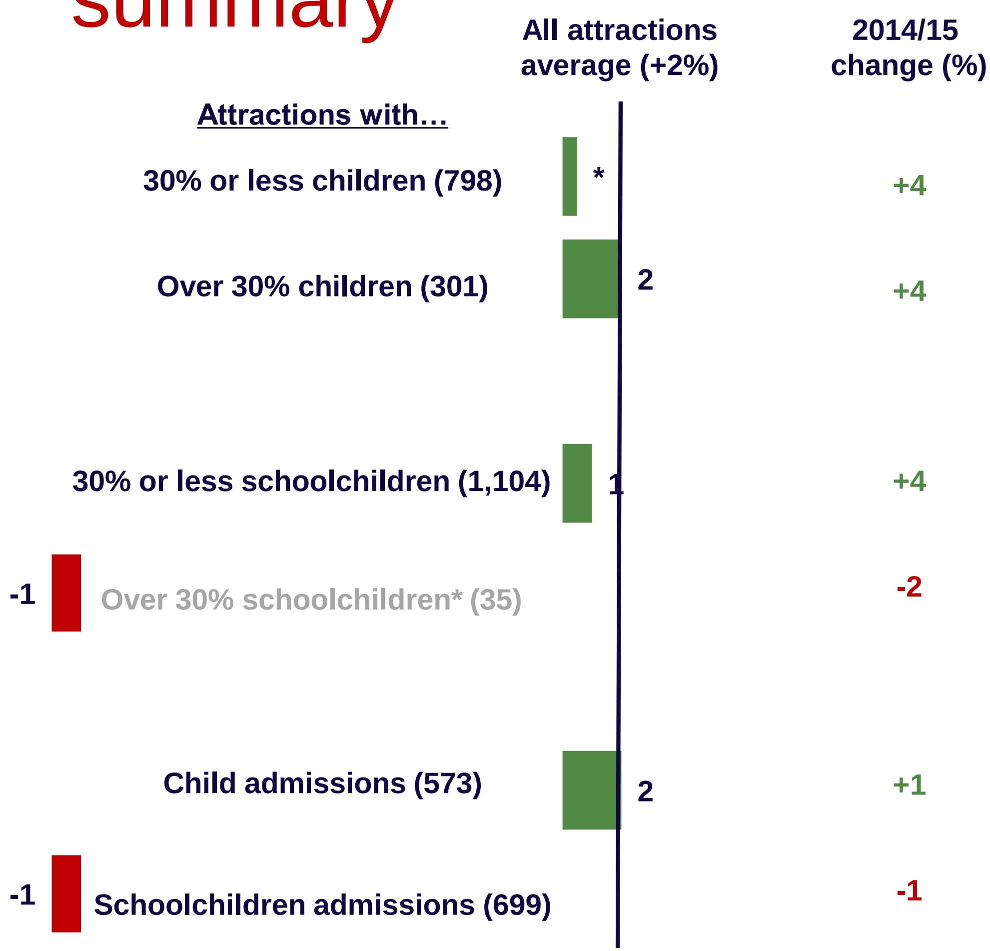
Visitor admission trends 2016 – other regional dimensions

% change 2015 / 2016



Base: All attractions providing visits data for both 2015 and 2016 (1,494).

Visitor admission trends 2016 – child visits summary

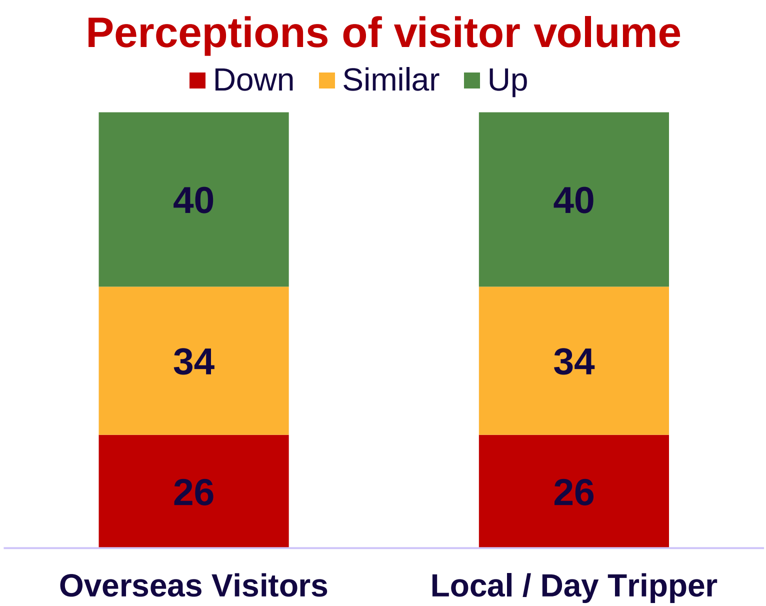


Family-focussed attractions (sites where children make up over 30% of admissions) increased visitors at a similar level to attractions overall (2%). However, sites which had lower child admission saw growth of less than 1%, compared with 4% in 2015.

In contrast, school children admissions fell back by 1%, compounding the reduction in school visits seen in 2015 and 2014 (both -1%).

Base: All attractions providing visits data for both 2015 and 2016 (1,494).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Visitor admission trends 2016 – by visitor origin



% change in visits 2016

-3% in visits
Overseas

+4% in visits
Local / Day

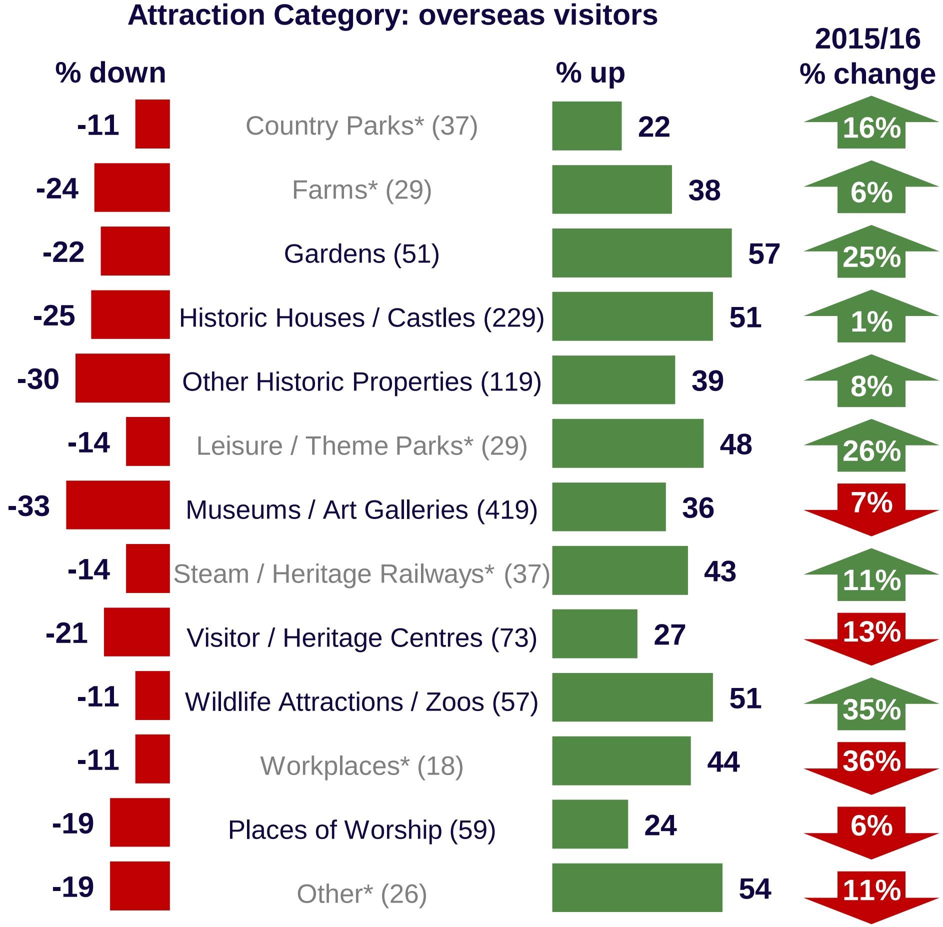
In 2016 more sites reported an increase (40%) in overseas visitors than a decrease (26%). However, at an overall level overseas visitors to attractions declined in by 3%. This is in contrast to 2015, when overseas visits increased by +4%.

The International Passenger Survey reported an increase in holidays or visits to see friends/ relatives in England of 4% in 2016, with a 2% increase in nights spent overall. However, the average spend on these visits declined by 2% and the average length of stay also reduced by 3%. So it seems that **although there were more overseas visitors, the shorter duration of their visits meant they had less time for attraction visits.**

The **decline in overseas visitors is driven by the larger sites, which have more visitors and therefore have a greater influence on the market change.** The position across most of the rest of England is more favourable.

Day tripper trends are more stable. Visitors grew by 4%, consistent with growth levels in the previous two years.

Visitor admission trends 2016 – overseas visitors by attraction category



Overseas visits to museums and galleries fell back in 2016, primarily driven by a drop of 6% in visits to London.
However, wildlife attractions/ zoos and gardens both saw strong increases.

Base: All attractions responding (c.1,200).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Visitor admission trends 2016 – overseas visitors by region

Region: overseas visitors

% down	Region	% up	2015/16 % change
-26	North West (130)	40	▲ 4%
-32	North East (69)	38	▲ *%
-28	Yorks / Humber (129)	41	▲ 9%
-28	East Midlands (124)	30	▲ 2%
-20	West Midlands (105)	40	▼ 3%
-23	East (124)	37	▲ 1%
-34	London (68)	41	▼ 6%
-26	South East (224)	39	▼ 5%
-21	South West (209)	51	▲ 9%

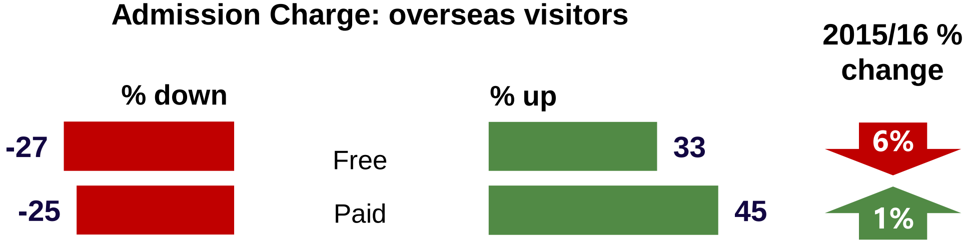
As well as London, 2016 saw a reduction in overseas visits to the South East (traditionally the second largest region visited by overseas visitors) and West Midlands.

Increased overseas visits were most prevalent in Yorks / Humber and in the South West – a region which had experienced successive drops in the previous three years (-2%, -6% and -18%).

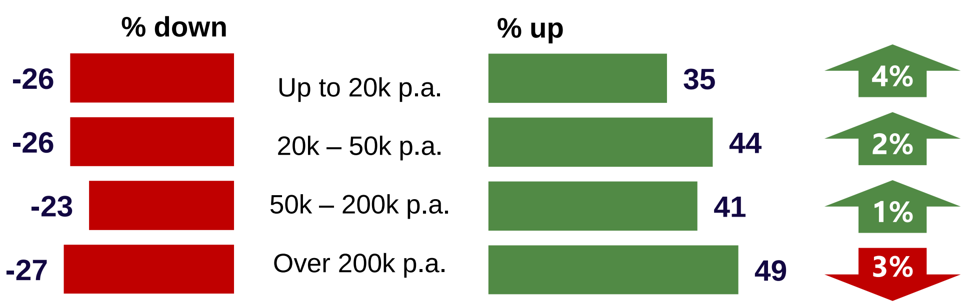
Base: All attractions responding (c.1,200).

Visitor admission trends 2016 – overseas visitors by admission charge and size

Admission Charge: overseas visitors



Size: overseas visitors



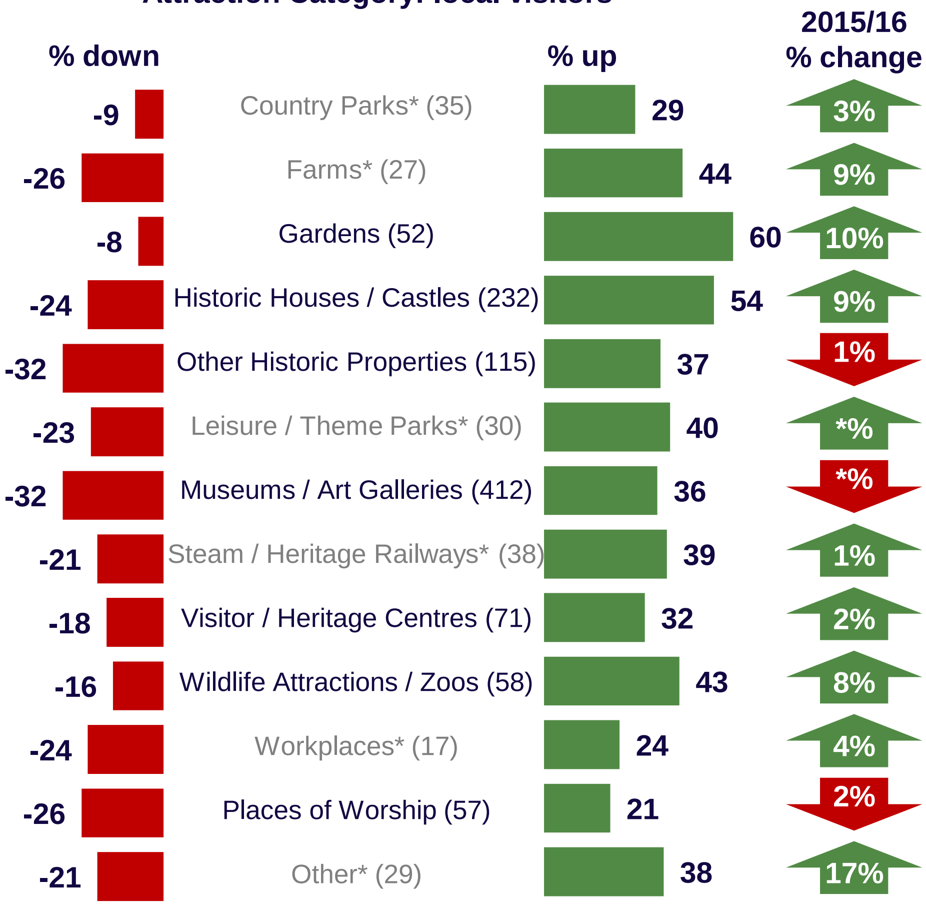
The overall drop in overseas visits is driven by a decline in visits to free attractions (-6%) by this audience. Overseas visits to paid attractions actually increased slightly (+1%) during this period.

In 2014 and 2015, larger (often government funded) attractions saw strong levels of growth from the overseas market whilst other attractions struggled. However, in 2016 this was reversed, with smaller attractions seeing increased levels of overseas visitors while large attractions struggled to attract visitors from overseas. This is linked to the decline in overseas visits to attractions in London and the South East.

Base: All attractions responding (c.1,200)

Visitor admission trends 2016 – local / day trip visitors by attraction category

Attraction Category: local visitors

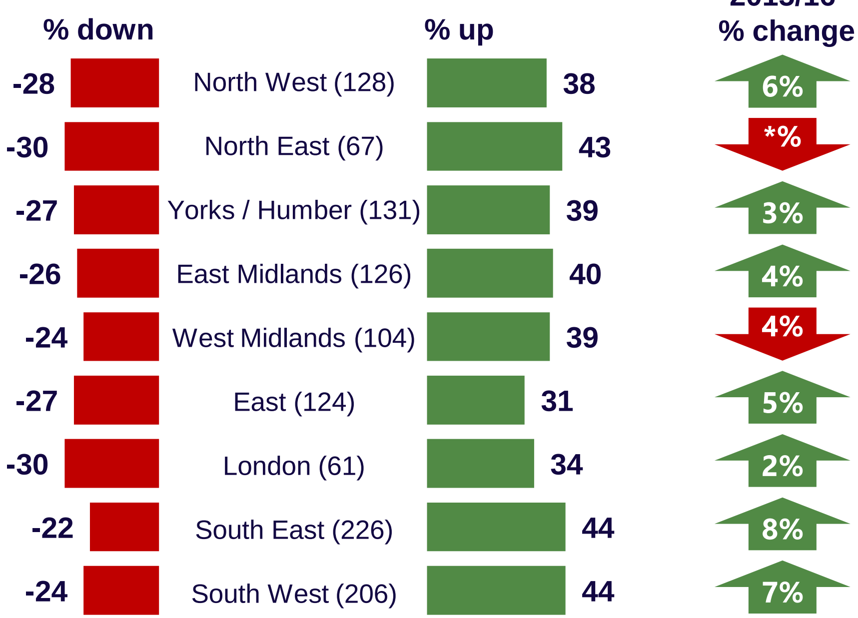


Most attraction types reported growth amongst local visitors. The only exceptions to this were places of worship, other historic properties and museums / galleries. There were strong increases at garden attractions.

Base: All attractions responding (c.1,200).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Visitor admission trends 2016 – local / day trip visitors by region

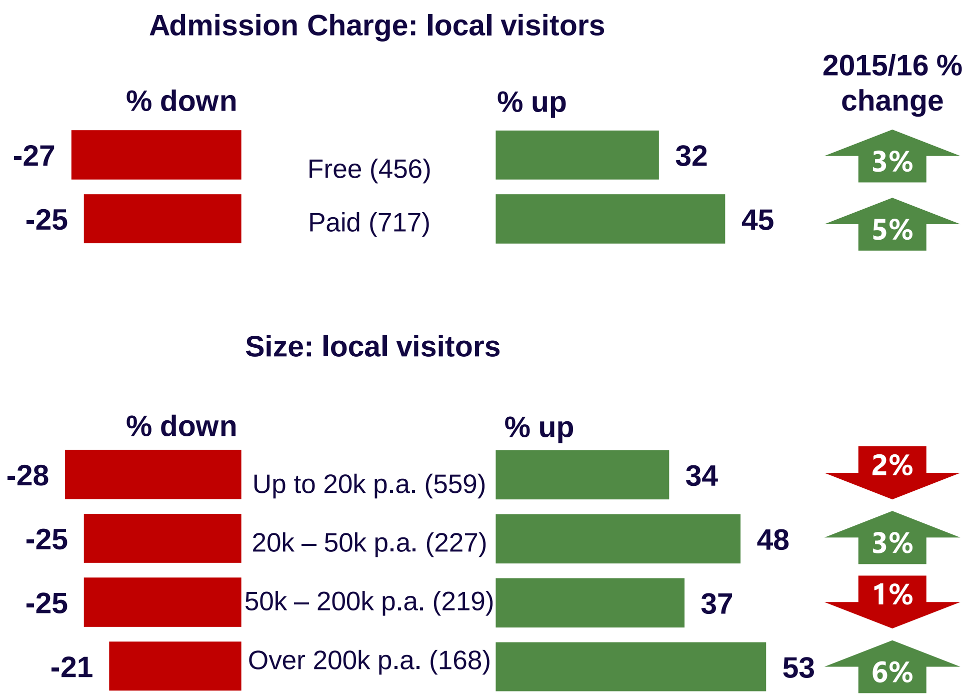
Region: local visitors



The only region to experience a notable reduction of local visits in 2016 was the West Midlands, whilst sites in the South East and South West of England saw particular growth (8% and 7% respectively).

Base: All attractions responding (c.1,200).

Visitor admission trends 2016 – local / day trip visitors by size and admission charge



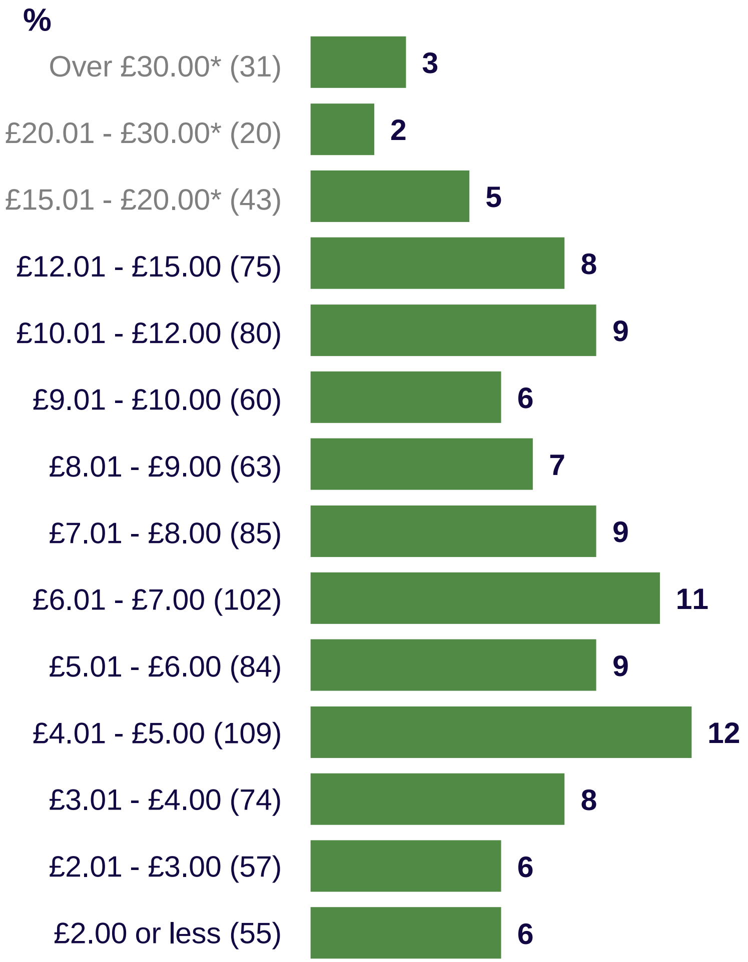
Attractions charging for admission (5%) saw a slightly higher increase in local visits than sites which were free to enter (3%).

As seen in 2015, larger attractions (6%) were more successful in attracting local visitors to their sites. However, local visits to the smallest attractions (2%) fell back, as did visits to attractions with 50,000 – 200,000 visitors (1%).

Base: All attractions responding (c.1,200)

Admission charge & revenue trends

Adult admission charges 2016



The **average adult admission charge** amongst attractions charging was £8.75 in 2016, up from £8.21 in 2015.

32% of these attractions charge £5 or less for adult entry. This follows the steady decline in recent years, down from 43% in 2012 (41% in 2013, 39% in 2014 and 35% in 2015).

Over a quarter (27%) of attractions now set their adult admission at £10 or more, a significant increase in recent years (21% in 2015 and 16% in 2014).

The average child charge in 2016 was £5.61. Nearly a third of charging attractions (32%) charge over £5 for child entry, up from 25% in 2015.

The proportion of charging attractions that offer free child entry has dropped from 14% in 2015 to 11% in 2016.

Base: Attractions charging for admission in 2016 (938).
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Adult admission charge trends 2016 – by attraction category

On average, **adult admission fees** increased by 6% in 2016. This is slightly higher than the previous 3 years, which all saw increases of 4%. This rise in adult admission fees in 2016 **is significantly higher than the rate of inflation over the same time period** (1.7%, Source: Bank of England).

When broken down into attraction categories, base sizes are small which limits the amount that can be read into the data. However, it does indicate that the sites with the highest average admission fees are leisure/theme parks (£18.28), wildlife attractions/zoos (£11.47) and places of worship (£10.17). The high figure for country parks is driven by a single multi-attraction operator who classify their attractions as country parks.

Child admission charges increased by 4% in 2016, a more moderate rise than in 2015 (10%). Consistent with 2015 historic properties increased their child admission charges the most – a 10% rise in total.

	% average increase in adult charge versus 2015	Average 2016 charge	2014/15 change (%)
ALL ATTRACTIONS (421)	6	£8.75	+4
Country Parks (3)*	8	£29.05	+5
Farms (16)*	2	£7.69	+6
Gardens (34)*	8	£7.78	+6
Historic Houses / Castles (104)	9	£8.55	+5
Other Historic Properties (37)*	2	£7.21	+4
Leisure / Theme Parks (14)*	4	£18.28	+4
Museums / Art Galleries (126)	5	£6.00	+4
Steam / Heritage Railways (23)*	5	£8.06	+4
Visitor / Heritage Centres (23)*	2	£6.99	+3
Wildlife Attractions / Zoos (23)*	2	£11.47	+1
Workplaces (5)*	9	£8.94	+5
Places of Worship (5)*	18	£10.17	+5
Other (8)*	3	£7.33	+<1

Base: Attractions providing admission charge data for both 2015 and 2016 (421)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Adult admission charge trends 2016 – by region

% change in adult admission charge

	All attractions average (+6%)	Average 2016 charge	2014/15 change (%)
North West (42)*	4	£9.38	+3
North East (11)*	-*	£6.96	+5
Yorks / Humber (46)*	9	£7.42	+5
East Midlands (41)*	7	£7.65	+5
West Midlands (38)*	7	£9.06	+6
East (51)	8	£8.40	+4
London (19)*	9	£10.93	+5
South East (94)	4	£9.69	+3
South West (79)	5	£8.48	+5

All regions other than the North East have experienced a rise in average adult admission charges in 2016.

As in previous years, London charging attractions have the highest admission fees (£10.93 on average), followed by the South East (£9.69), the North West (£9.38) and the West Midlands (£9.06), although it should be noted that base sizes are very low for these regions.

In the three regions where base sizes are robust enough to analyse individually (East, South East and South West), admission charge increases either matched or exceeded the rates seen for 2015.

Base: All attractions providing admission charge data for both 2015 and 2016 (421)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Adult admission charge trends 2016 – by attraction size

% change in adult admission charge

Annual visits	All attractions average (+6%)	Average 2016 charge	2014/15 change (%)
20,000 or less p.a. (178)	6	£6.15	+4
20,001 – 50,000 p.a. (85)	8	£8.69	+4
50,001 – 100,000 p.a.* (42)	6	£10.10	+5
100,001 – 200,000 p.a.* (45)	5	£10.19	+4
Over 200,000 p.a. (71)	5	£14.62	+5

Average site admission charges broadly increase with the number of visitors attracted. Charging attractions with over 200,000 visitors a year charge £14.62 on average, whereas sites that attract 20,000 visitors or less charge adult visitors £6.15 on average.

Adult admission charges have increased the most amongst attractions that attract between 20,001 – 50,000 visitors per annum, with an 8% rise.

The rise in adult admission charges is equal or higher than rises in 2015 amongst attractions of all different sizes.

Base: All attractions providing admission charge data for both 2015 and 2016 (421)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Adult admission charge trends 2016 – by geographic location and child admissions

% change in adult admission charge

	All attractions average (+6%)	Average 2016 charge	2014/15 change (%)
Coastal (59)	6	£7.67	+4
Rural (239)	5	£9.52	+4
Urban (123)	8	£7.57	+4
Attractions with…			
30% or fewer child visits (276)	6	£7.41	+5
Over 30% child visits (101)	4	£8.87	+4
30% or less overseas visits (361)	6	£8.09	+4
Over 30% overseas visits* (25)	5	£7.46	+3

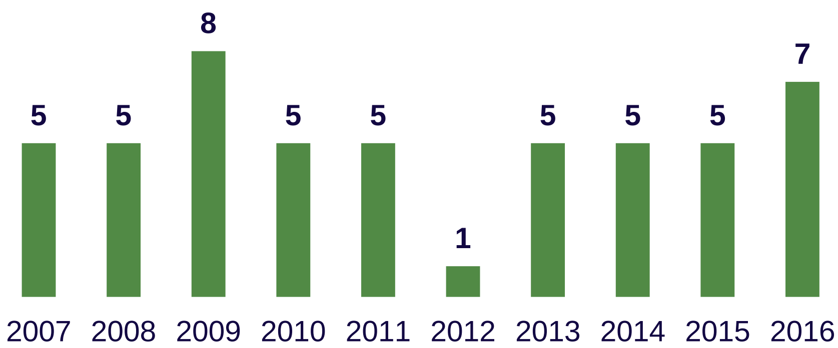
Rural attractions tend to charge the highest admission fees for adults (£9.52 on average). However, urban attractions report the highest increase in adult admission charges (+8%).

As in 2015, attractions with more than 30% child visits tend to charge higher adult admission fees than those with fewer than 30% child visits (£8.87 compared with £7.41). However, their increase in admission fees has been slightly more tempered (+4% vs. +6% amongst attractions with 30% or fewer visits).

Base: All attractions providing admission charge data for both 2015 and 2016 (421)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Gross revenue trend

% change in gross revenue



% change adult admission charges

Gross revenue at visitor attractions increased by an average of 7% in 2016, breaking from the typical increase of 5% seen in previous years.

Nearly half (46%) of attractions reported an increase in gross revenue in 2016, the same figure as in 2015. Around 1 in 7 (14%) reported a decrease in revenue, lower than the 1 in 5 (19%) reporting a decrease in 2015.

In previous years, the % increase in admission charges has been correlated with increased revenue, but this association is negligible this year, perhaps due to the contribution of other income generating activities on revenue.

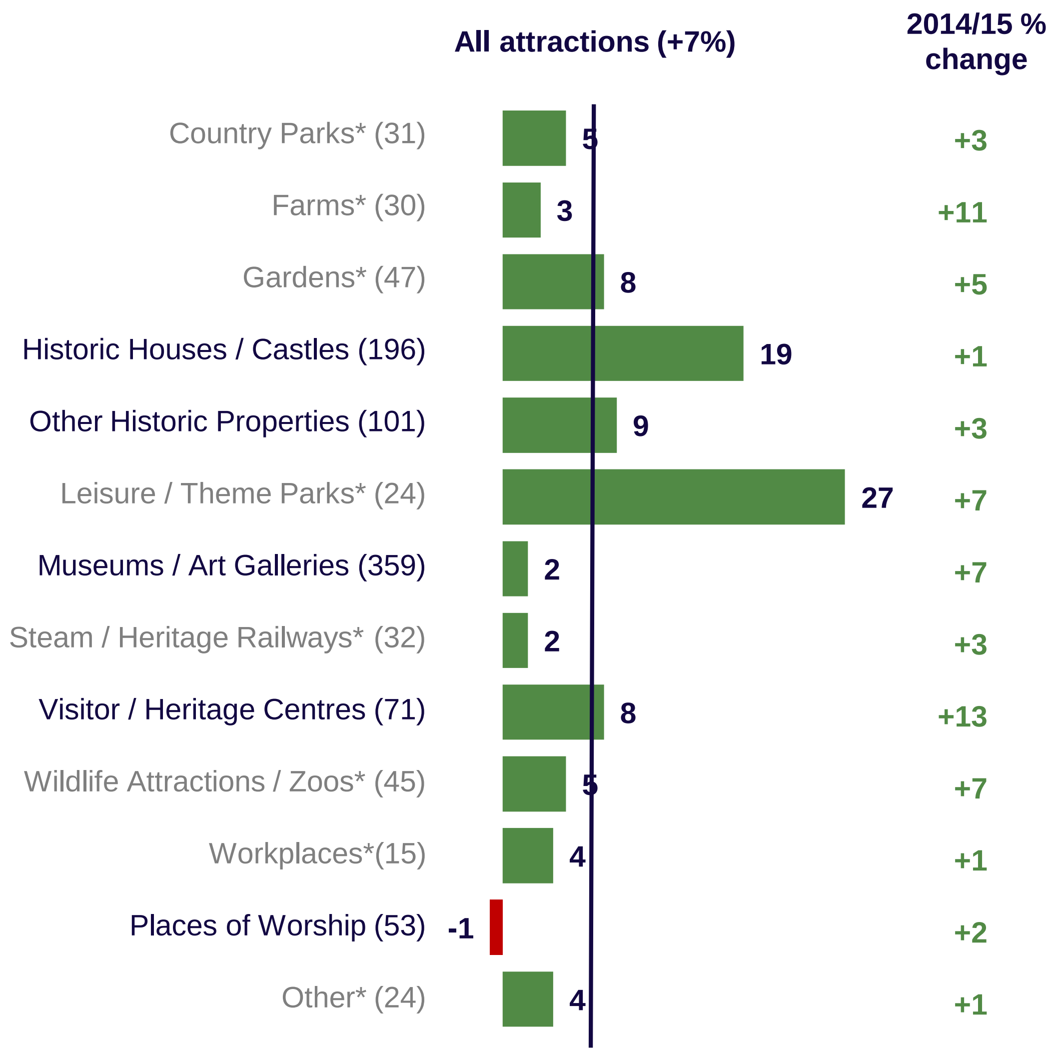
Base: All attractions responding (1,028)

Gross revenue trend 2016 – by attraction category

Aside from places of worship, all types of attraction increased their gross revenue in 2016. It is worth noting that places of worship were also the category with the highest increase in admission charges.

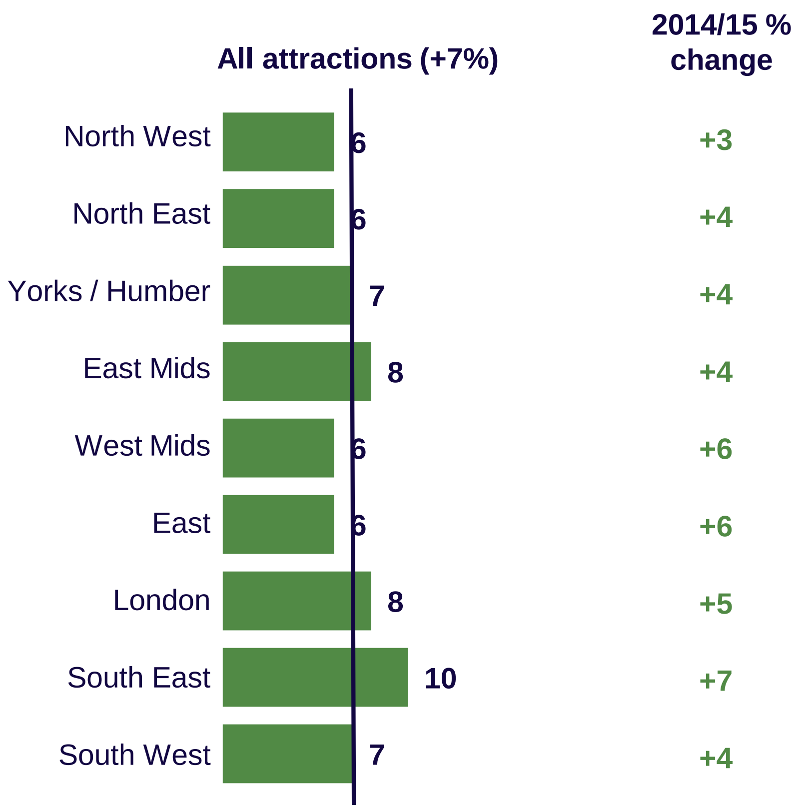
Historic houses / castles reported a high increase in gross revenue (19%), this is in contrast to 2015 when the sector reported relatively weak growth of 1%.

Museums/art galleries was one of the categories that reported the weakest gross revenue growth in 2016 (2%).



Base: All attractions responding (1,028)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Gross revenue trend 2016 – by region



All regions reported an increase in their gross revenue in 2016, with 6% the lowest.

For the second consecutive year, attractions in the South East reported the highest increase in revenue (10%).

London attractions also reported healthy increases in revenues (+8%), despite the fall in admissions numbers in 2016.

Base: All attractions responding (1,028)

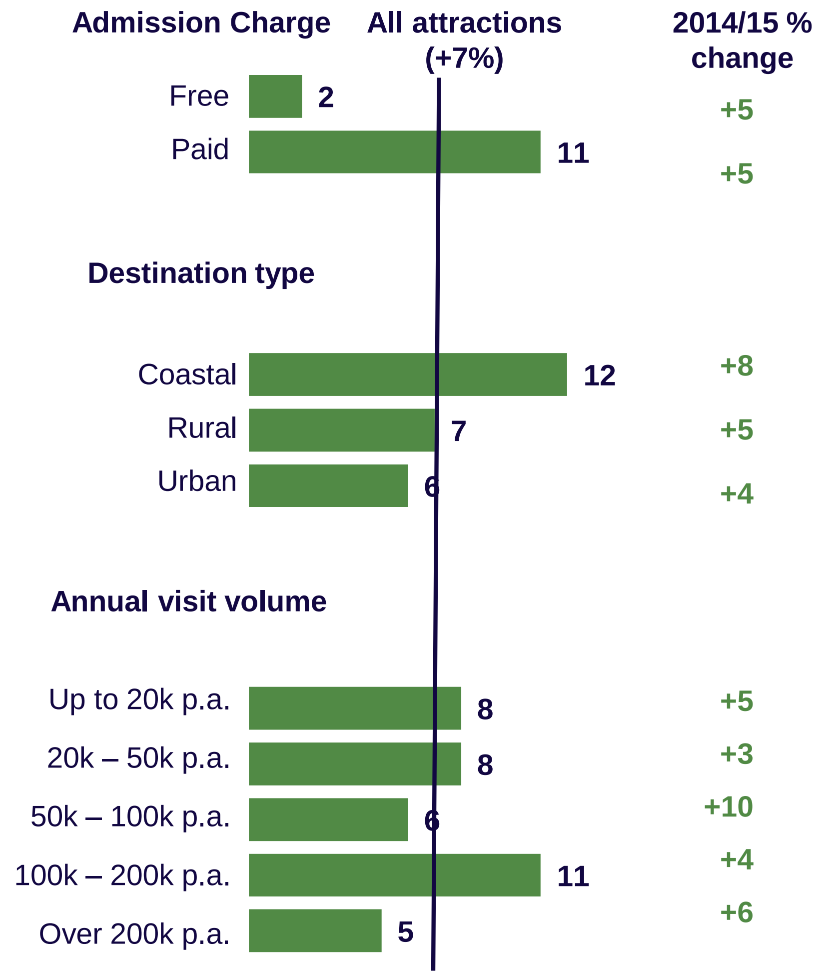
Gross revenue trend 2016 – by admission charge, destination type and visit volume

There were some notable variations in the types of venue that generated an increase in gross revenue in 2016.

Charging attractions reported gross revenue increases of 11%, notably higher than free attractions which reported increases of 2%. This aligns with the higher increase in admissions numbers also reported by charging attractions.

For the second consecutive year, coastal sites reported the highest increase in gross revenue – a 12% increase in 2016, and 8% in 2015. Rural and Urban attractions also reported increases in revenue.

There is no association between gross revenue and visitor volumes. Revenue increases were highest amongst attractions with visitor volumes of 100k-200k visitors per year (11%), and lowest amongst attractions with visitor volumes of 200k+ per year (5%).

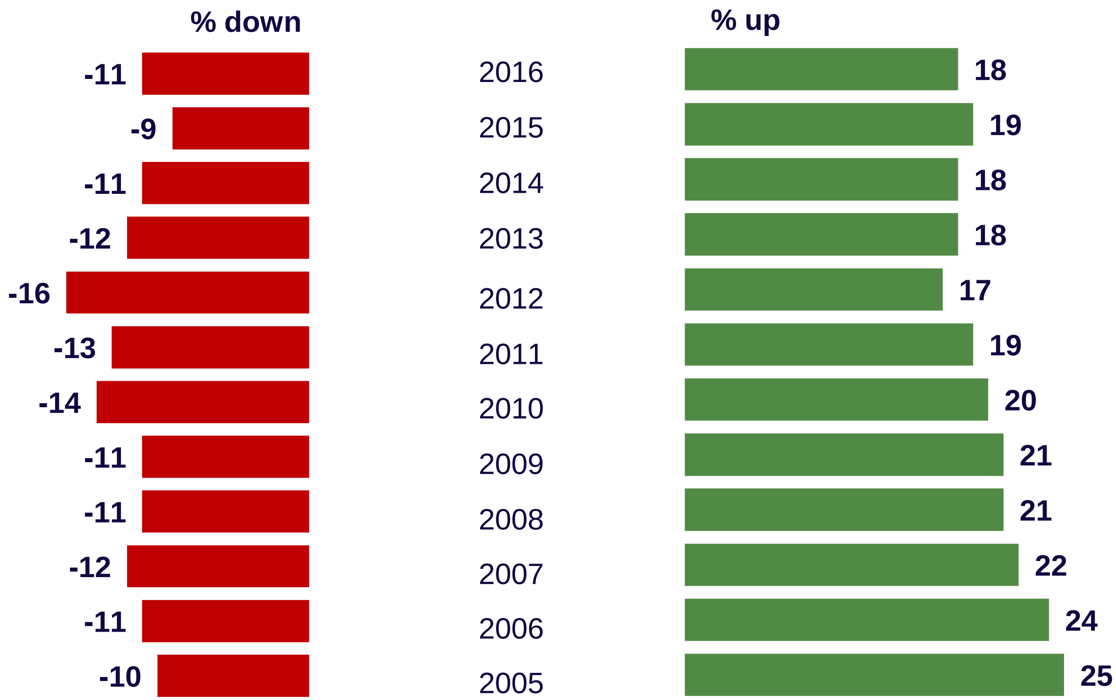


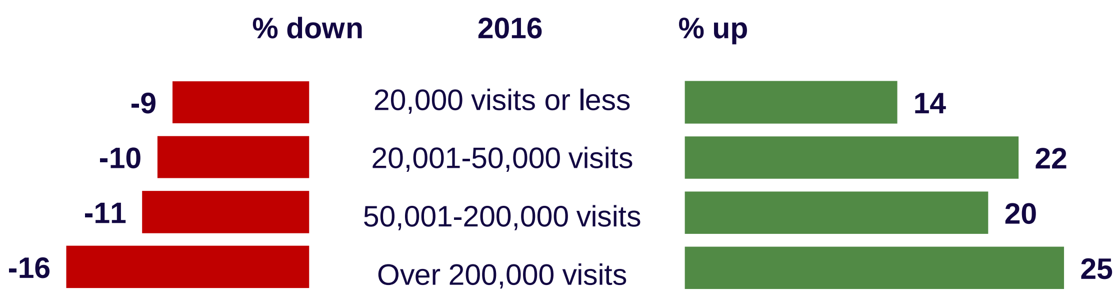
Base: All attractions responding (1,028)

VisitEngland

Marketing & communications trends

Marketing expenditure trend



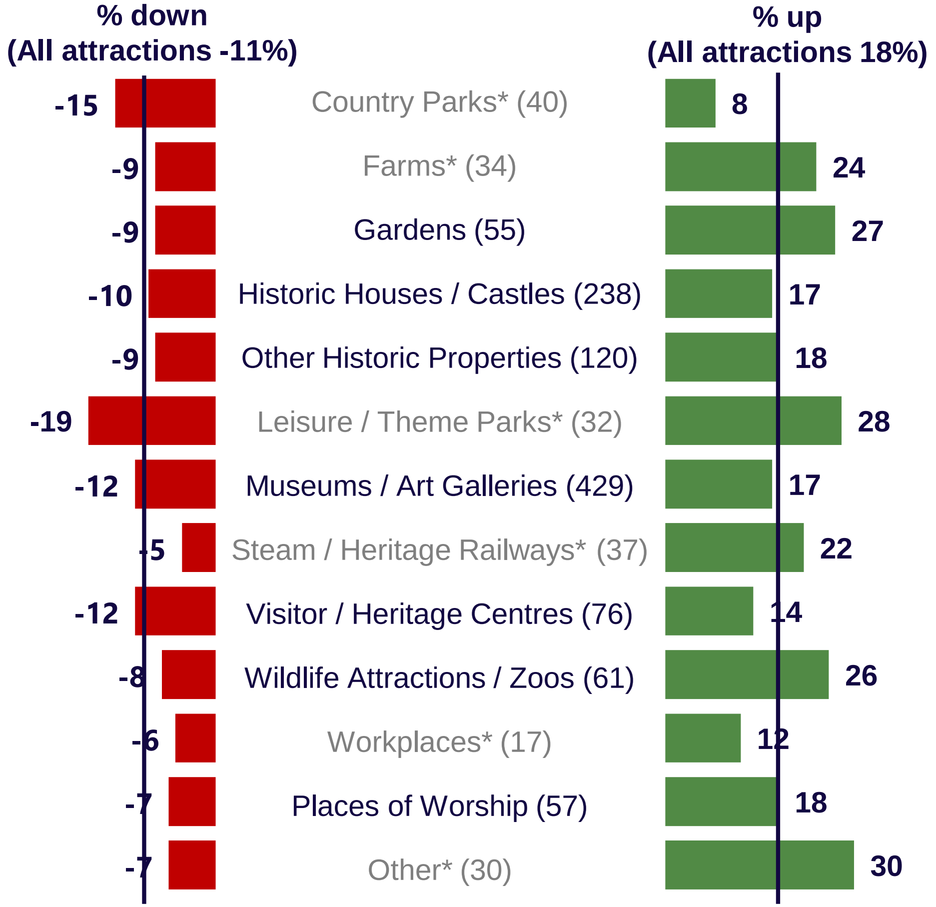


Marketing expenditure trends are largely consistent with the previous three years; attractions are more likely to have increased their marketing spend in 2016 (18%) than they are to have decreased it (11%).

As in previous years, there is a dichotomy in the marketing expenditure of large attractions (over 200,000 visits). This category is the most likely to have increased *and* decreased their spending. This contrast may be driven by a shift towards cheaper digital marketing methods at some attractions.

Base: Attractions answering marketing question (1,226)

Marketing expenditure trends 2016 –by attraction category

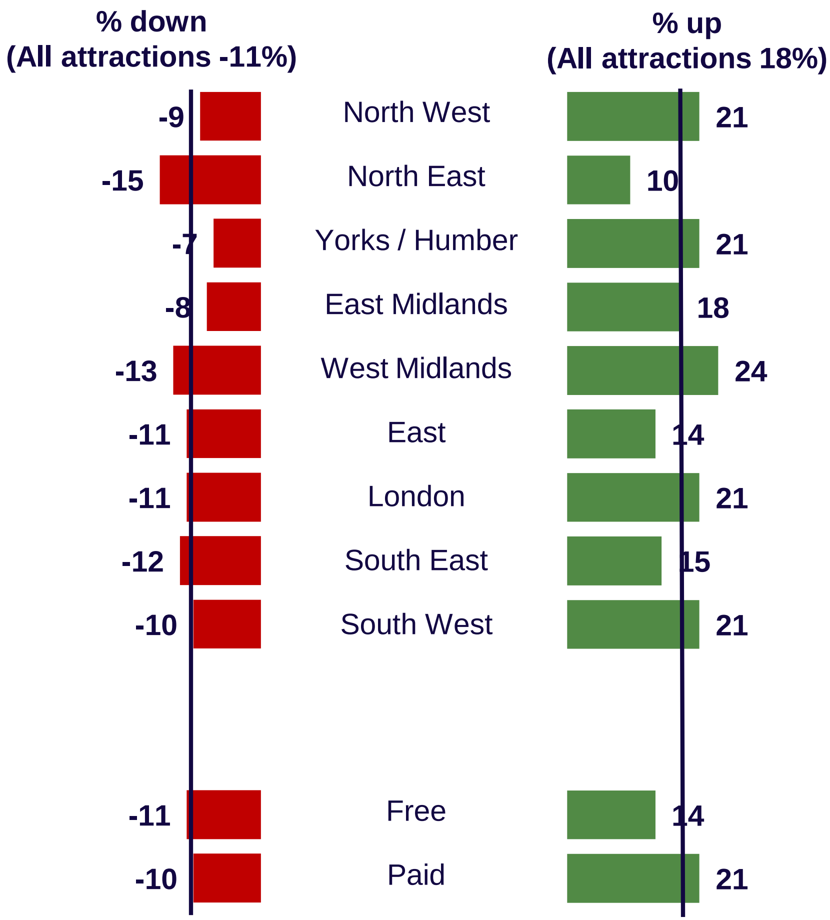


There is some evidence that leisure/theme parks were the sector most likely to have increased their marketing spend, with 28% doing so. However, they were also the most likely category to report cuts in marketing expenditure in 2016 (-19%).

Gardens and wildlife attractions were also more likely than average to have increased their marketing spend in 2016.

Base: Attractions answering marketing question (1,226)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Marketing expenditure trends 2016 – by region and admission charge



As reported in previous years, attractions that charge entry are more likely than free venues to have increased their marketing spend; there is minimal difference in the proportion stating they have decreased their spending.

Attractions in the West Midlands are the most likely to have increased their marketing spend in 2016 (24% doing so), and the second most likely to have decreased it (13% having done so).

The North East is the only region that has reported a net reduction in marketing spend in 2016.

Base: Attractions answering marketing question (1,226)

Impact of marketing expenditure - summary

	Marketing spend in 2016	
2015 / 16 change in…	**Up**	**Down**
Total visitor admissions	+3%	+1%
Local visits	+8%	-2%
Overseas visits	-<1%	-3%
Gross revenue	+12%	+5%

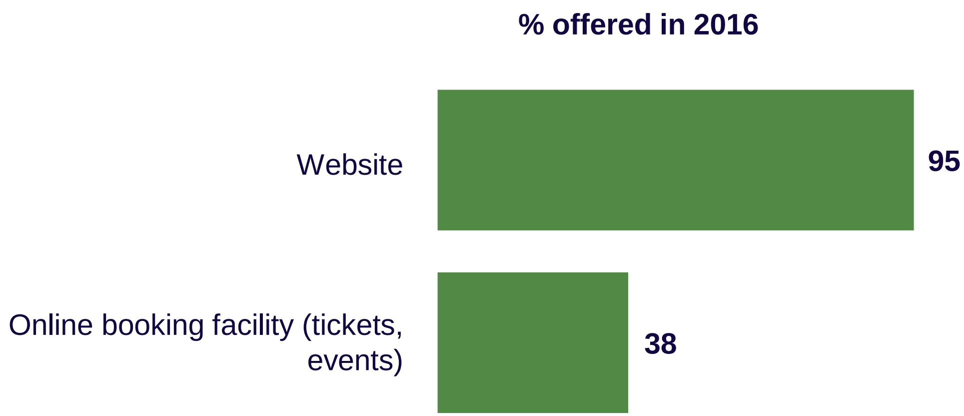
Consistent with previous years, attractions that reported an increase in their marketing spend were more likely to increase their total admissions and gross revenue.

Visitor admissions rose by 3% amongst attractions that reported an increase in marketing spend. In contrast, those that reduced their expenditure, visitor admissions rose by just 1%.

Increasing marketing spend tends to have a more marked impact on local visitors, attractions that spent more reporting an 8% increase in this audience, compared with a 2% drop amongst sites that spent less.

Increased marketing expenditure tends to be a catalyst for gross revenue, 12% of those that spent more seeing it rise, compared with 5% of those that spent less.

Website and online booking facilities



% offered	Website	Online Booking
Under 10k visits p.a.	89	13
10k - 20k visits p.a.	96	33
20k - 100k visits p.a.	98	45
100k - 200k visits p.a.	99	55
Over 200k visits p.a.	99	71
Free attractions	92	25
Paid attractions	97	46

The vast majority of attractions (95%) have a website, a slight increase on 2015 (93%). Venues that attract under 10k visits per year are the least likely to offer a website (89%) although this has increased since 2015 (86%).

Over 90% of all venue categories offer a website (see page 45).

Nearly 2 in 5 attractions (38%) offer an online booking facility, a significant rise on 2015 when only 29% had this resource. The provision of online booking options tends to increase with the size of a venue – 13% of venues attracting under 10,000 visitors per year offering this feature, rising to 71% of venues attracting over 200,000 visitors per year.

Leisure/theme parks (75%) are the type of attraction most likely to offer online booking, followed by steam/heritage railways (66%).

As we would expect, online booking is most likely to be offered by paid attractions (46%) than free attractions (25%).

Base: All answering digital communications question (1,292)

VisitEngland

Other digital communications offered

The use of other digital communications shows continued growth with 88% of attractions offering them in 2016, compared with 85% in 2015 and 83% in 2014.

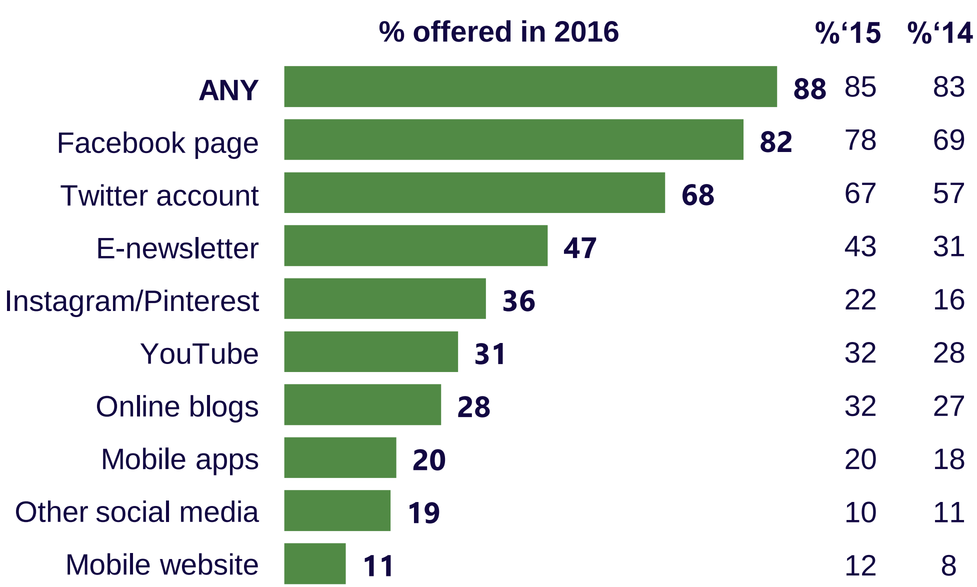
Attractions are most likely to offer a Facebook page (82%) and Twitter account (68%), both of which have increased marginally since 2015.

Over a third of attractions (36%) use Instagram/ Pinterest as a form of communications, a significant rise on 2015, when only 1 in 5 (22%) did so. This rise reflects Instagram's overall increase in users. Historic houses and leisure/theme parks are the types of attraction most likely to offer this mode of communication.

Nearly half of attractions (47%) offered e-newsletters in 2016 (up from 43% in 2015 and 31% in 2014).

The proportion of attractions using YouTube (31%) and online blogs (28%) have dropped marginally since 2015 when both channels were employed by 32% of attractions.

The range of digital communications attractions offer tends to increase in line with visitor volume.



% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	**78**	**96**	**96**
Facebook page	70	91	94
Twitter account	50	78	89
E-newsletter	32	51	70
Instagram/Pinterest	22	43	56
YouTube	19	35	51
Online blogs	18	32	45
Mobile apps	13	23	30
Other social media	14	21	28
Mobile website	4	10	24

Base: All answering digital communications question (1,292)

Digital communications offered in 2016 – by

% offering	Country Parks	Farms	Gardens	Historic houses / castles	Other historic properties	Leisure / theme parks	Museums / art galleries	Steam / heritage railways	Visitor / heritage centres	Wildlife / zoos	Work-places	Places of Worship	Other
ANY	**90**	**94**	**86**	**92**	**87**	**97**	**86**	**89**	**89**	**94**	**84**	**72**	**84**
Facebook	83	94	86	89	83	94	78	87	81	85	74	64	81
Twitter account	61	66	67	83	71	69	64	55	58	67	63	46	74
E-newsletter	29	40	46	64	54	66	43	42	34	39	47	30	35
Instagram/ Pinterest	22	37	40	59	45	53	31	16	8	32	26	15	39
YouTube	17	29	18	45	43	50	29	26	12	35	11	13	29
Online blogs	17	9	32	47	41	34	25	16	10	30	21	8	6
Mobile apps	22	-	14	51	40	13	8	8	7	15	5	8	-
Other social media	7	3	9	40	32	22	15	5	7	14	11	3	13
Mobile website	15	9	18	11	6	25	10	18	6	14	5	5	23
WEBSITE	**95**	**94**	**96**	**98**	**93**	**100**	**92**	**100**	**95**	**97**	**100**	**97**	**97**
ONLINE BOOKING	**34**	**40**	**32**	**50**	**41**	**75**	**28**	**66**	**25**	**47**	**26**	**23**	**48**

Base: All answering digital communications question (1,292)

Impact of digital communications - summary

2015 / 16 change in…	Offer any digital communications (exc. website / online booking)? Yes	No
Total visitor admissions	+1%	+2%
Local visits	+4%	-2%
Overseas visits	-3%	-7%
Gross revenue	+8%	+1%

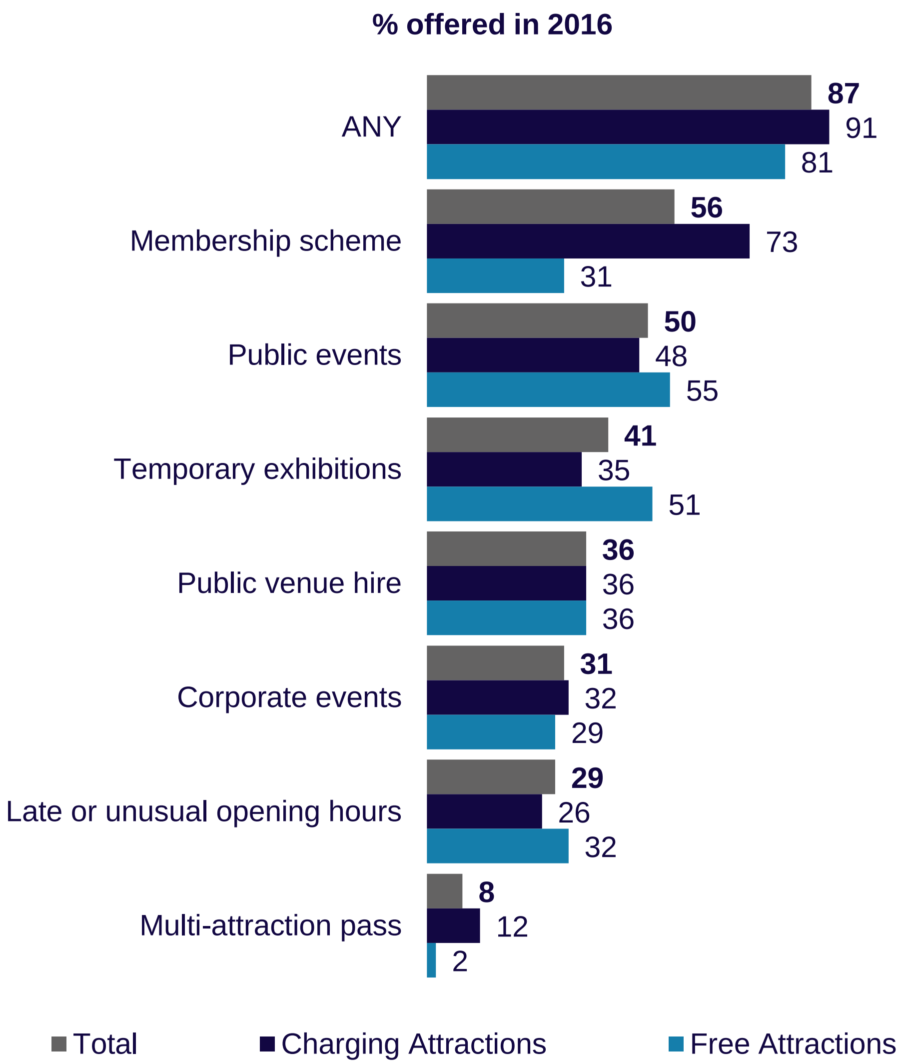
Whether or not an attraction offers digital communications appears to have limited bearing on total visitor admissions. Total admissions increased by 1% amongst those offering digital communications compared to a rise of 2% amongst attractions that don't.

However, offering digital communications does positively correlate with higher admissions amongst local and overseas visitors. Attractions offering digital communications experienced a 4% rise in local visits and a 3% drop in overseas visits, both higher than attractions that don't (-2% and -7% respectively).

Use of digital communications is correlated with gross revenue, with 8% of those using any digital communications reporting a rise in gross revenue , compared with only 1% that don't.

Other activities offered by attractions

Other activities offered by attractions in 2016



Base: All answering additional activities question (1,285)

Charging attractions (which are able to offer a very tangible benefit of saving on entrance costs) are more than twice as likely as free attractions to offer a membership scheme.

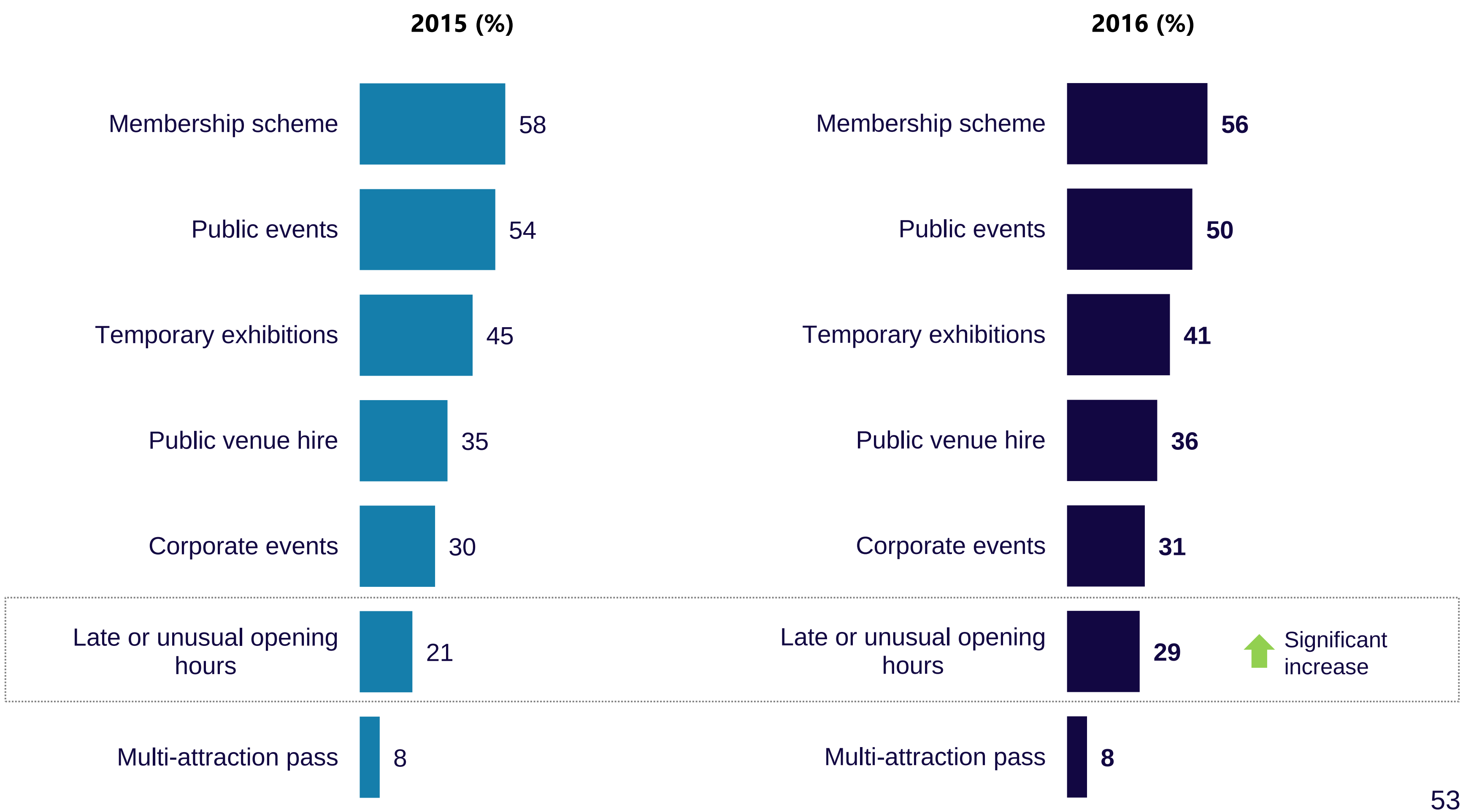
Multi-attraction pass schemes also attract participation of around 1 in 8 (12%) charging attractions.

In contrast, free attractions are more likely than charging attractions to offer public events, temporary exhibitions, and ‘lates’ / unusual opening hours (which in the absence of main attraction entrance fees may be core sources of income).

Just over a third of all attractions hire their venue out to the public (36%), and around 3 in 10 (31%) offer corporate events. These proportions are consistent for charging and free sites.

Other activities offered – 2016 vs. 2015

The proportion of attractions offering each of these additional options has remained fairly consistent year on year. The exception is offering 'lates' or unusual opening hours, which has significantly increased since 2015, up from 21% (2015) to 29% (2016).



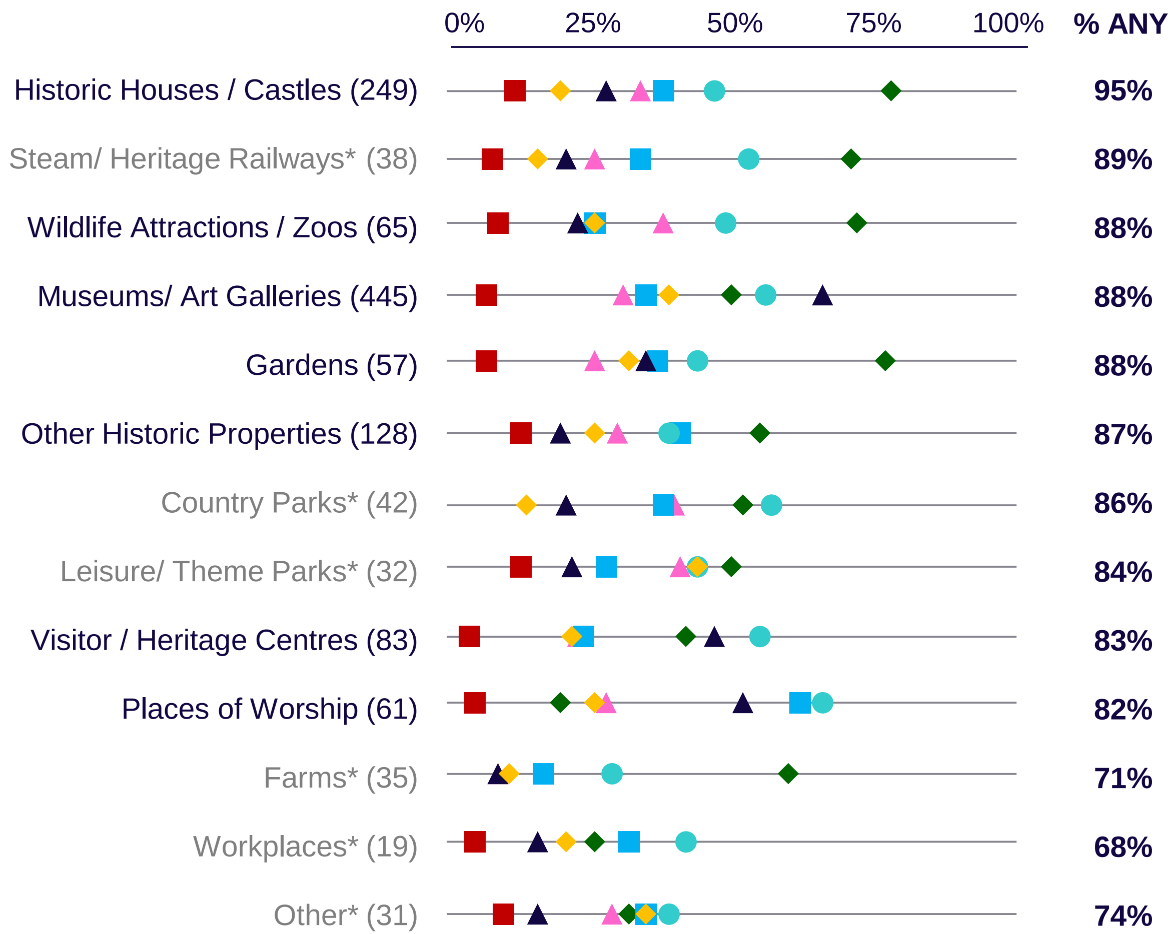
Base: All answering additional activities question (1,285)

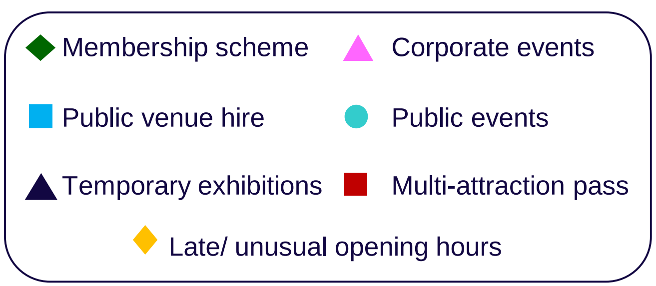
Other activities offered in 2016 – by attraction category

There is significant variation in the income generation activities offered by different categories of attractions.

However, it is interesting to note that there are attractions participating in each of these activities/ schemes across almost every category (the exception being no country parks or farms participating in multi-pass schemes), demonstrating that none of these activities are off limits for any particular attraction category.

For example, 28% of places of worship offered corporate events and 22% of visitor / heritage centres offered late or unusual opening hours.





Base: All answering additional activities question (1,285)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Other activities offered by attractions in 2016 – by visitor volume

	Visit Volume				
% offering	Under 10k	10k-20k	20k-50k	50k-100k	Over 100k
ANY (2016)	**79**	**89**	**89**	**92**	**95**
Membership scheme	40	59	62	63	71
Public events	40	45	51	56	66
Temporary exhibitions	35	32	44	40	53
Public venue hire	24	32	38	37	53
Corporate events	15	25	36	32	51
Late or unusual opening hours	25	21	28	25	42
Multi-attraction pass	2	7	10	11	15

Although not always a direct linear relationship, participation in these activities/ schemes increases with the size of the attraction.

Nonetheless, significant proportions of smaller attractions (with under 10k visitors a year) offer these activities/ schemes, in particular membership (40%), public events (40%) and temporary exhibitions (35%).

Base: All answering additional activities question (1,285)

Other activities offered by attractions in 2016 – by region

London continues to lead the way for multi-attraction passes (predominantly the London Pass), 'lates', temporary exhibitions, public venue hire and corporate events. Membership schemes are most common in the West Midlands, and Public events in the North West of England.

	Region (%)								
% offering	**NW**	**NE**	**Y+H**	**EM**	**WM**	**EAST**	**LON**	**SE**	**SW**
ANY (2016)	**93**	**82**	**82**	**84**	**91**	**86**	**94**	**87**	**87**
Membership schemes	55	55	47	52	**64**	58	56	55	**63**
Public events	**62**	40	45	47	**60**	44	56	49	51
Temporary exhibitions	**52**	34	45	38	35	36	**60**	33	45
Public venue hire	42	33	33	31	44	27	**56**	31	37
Corporate events	36	25	24	27	38	24	**53**	31	27
Late or unusual opening hours	38	30	28	20	30	29	**44**	24	27
Multi-attraction pass	11	1	10	6	6	1	**34**	6	7

Base: All answering additional activities question (1,285)

Impact of other activities - summary

	Other activities offered?	
2015 / 16 change in…	**Yes**	**No**
Gross revenue	+8%	+3%
Proportion of attractions increasing their permanent staffing levels	14%	4%
Proportion of attractions increasing their seasonal staffing levels	12%	4%
Proportion of attractions increasing their unpaid volunteers	21%	13%

Visitor numbers collected in the survey excluded special events outside normal opening hours and any private hire, so we are unable to assess the impact of these activities as a whole on visitor numbers.

However, we can see that these extended provisions are associated with increased gross revenue in 2016 (up by 8% amongst attractions offering these additional activities vs. only 3% amongst attractions who do not).

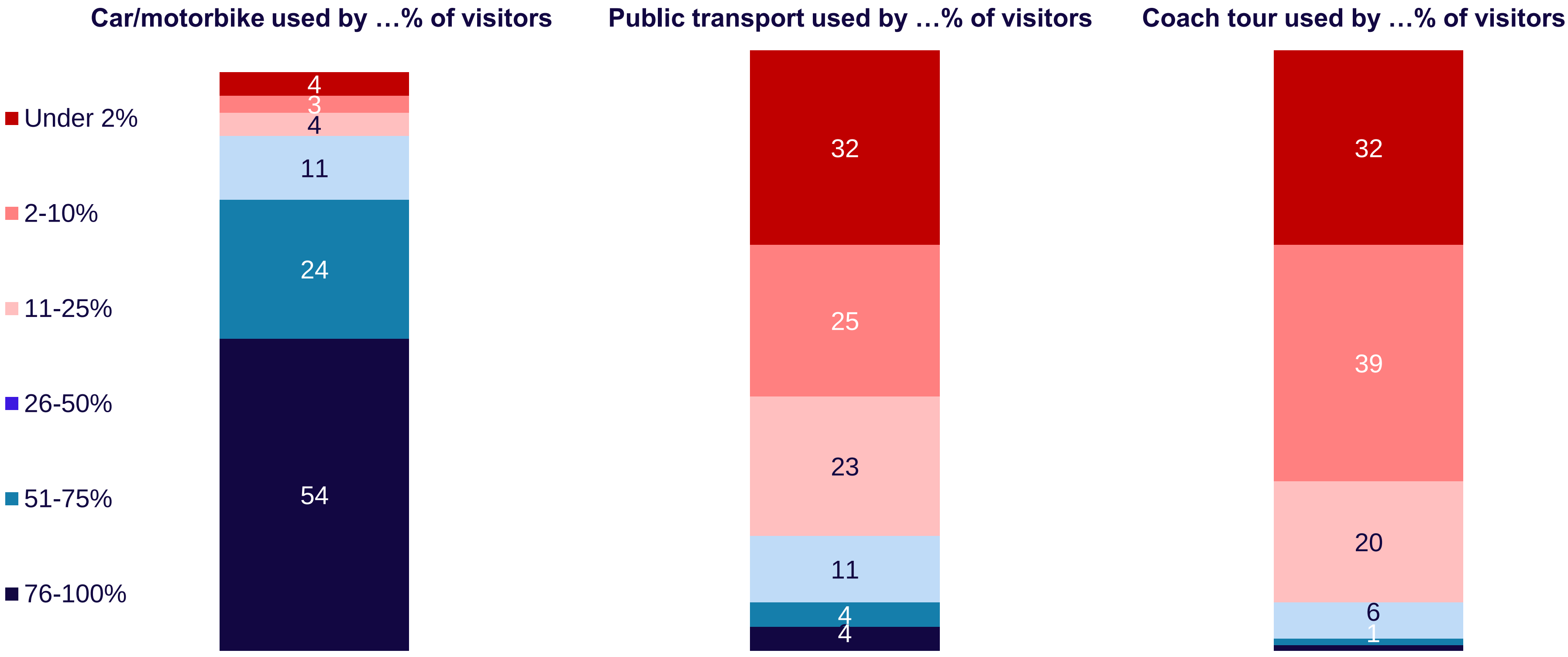
Offering these activities is correlated with recruitment of new permanent and seasonal staff and volunteers, so the impact of the activities on net profit may be lower.

VisitEngland

Transport

Transport used for main part of journey

Proportion of visitors using the relevant form of transport for the main part of their journey
(e.g. 54% of attractions say that 76-100% of their visitors use car/ motorbike for the main leg of their journey)



Personal transportation is by far the most common method of travel to attractions, with over half of attractions saying that at least three quarters of their visitors travel to their site by car or motorbike.

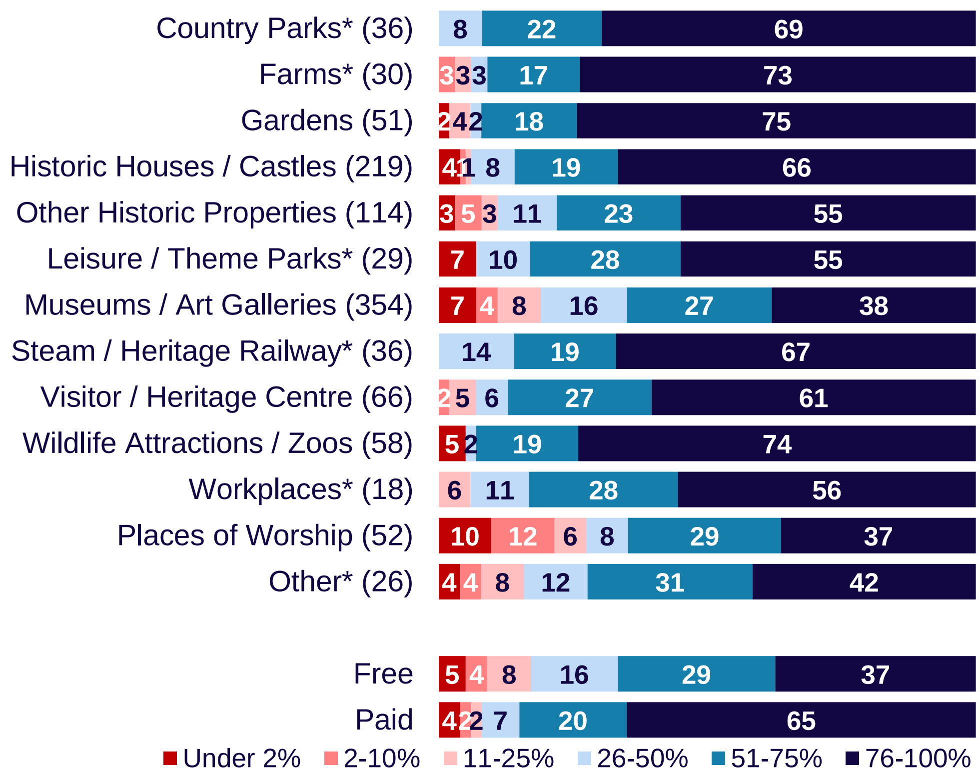
Public transport and coach tours are used far less, with around a third of attractions (32%) estimating that less than 2% of their visitors travel mostly by coach tour or public transport.

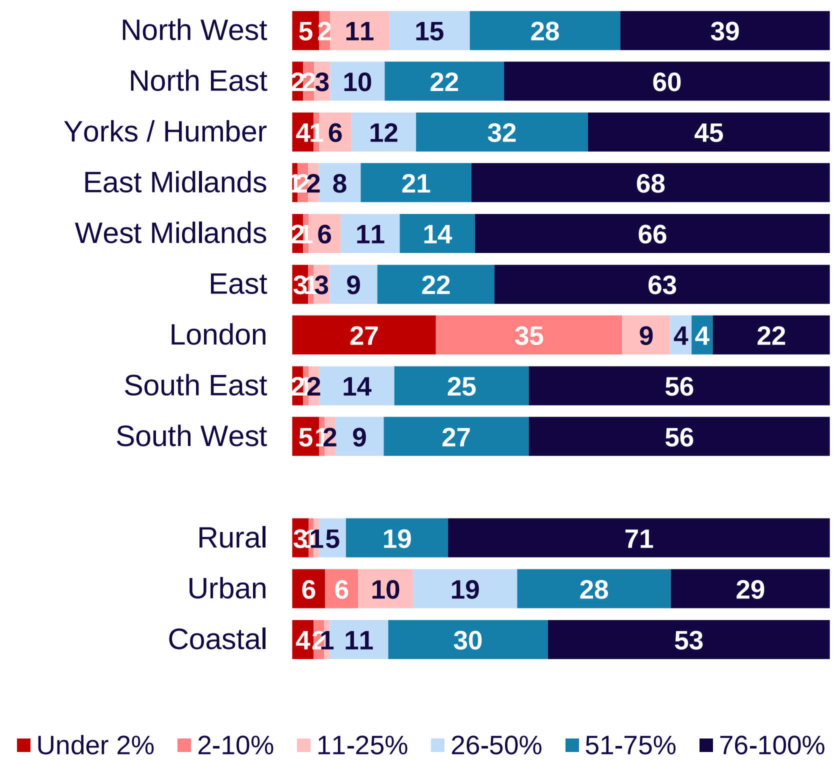
Base: All answering each transport question (car/ motorbike 1,089, coach 1,019, public transport 1,032)

Transport used for main part of journey – Car/motorbike

Proportion of visitors using the relevant form of transport for the main part of their journey

Visitors to attractions set in rural areas are the most likely to drive themselves, while visitors to urban attractions (especially those in London) are more likely to use other modes of transport for the main part of their journey.





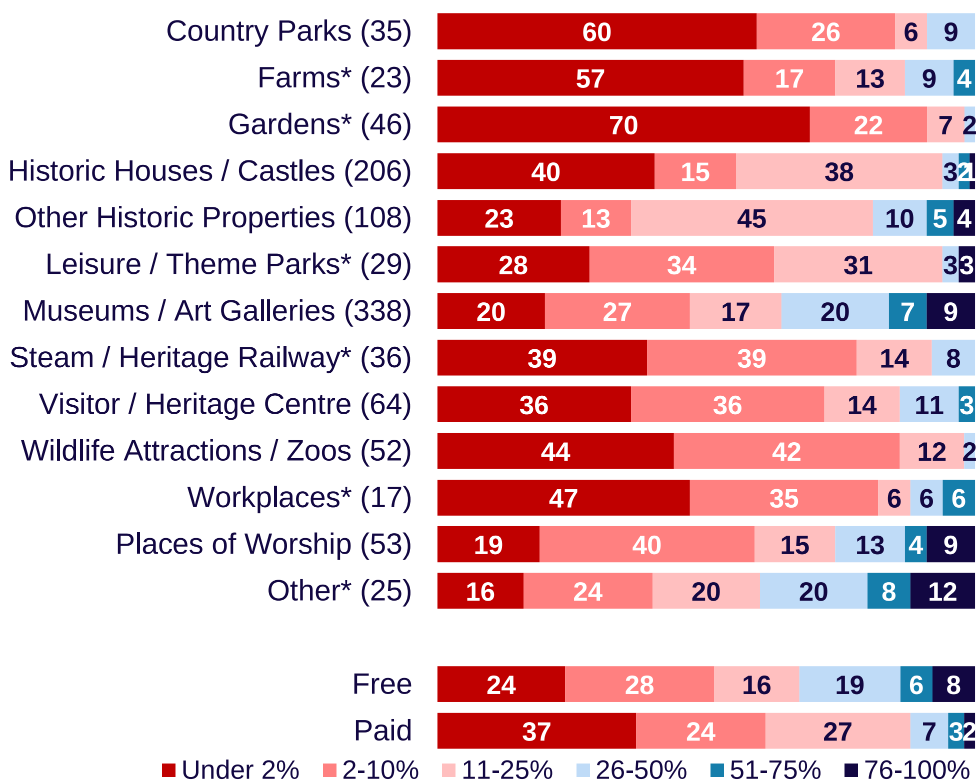
Base: All answering car/ motorbike question (1,089)

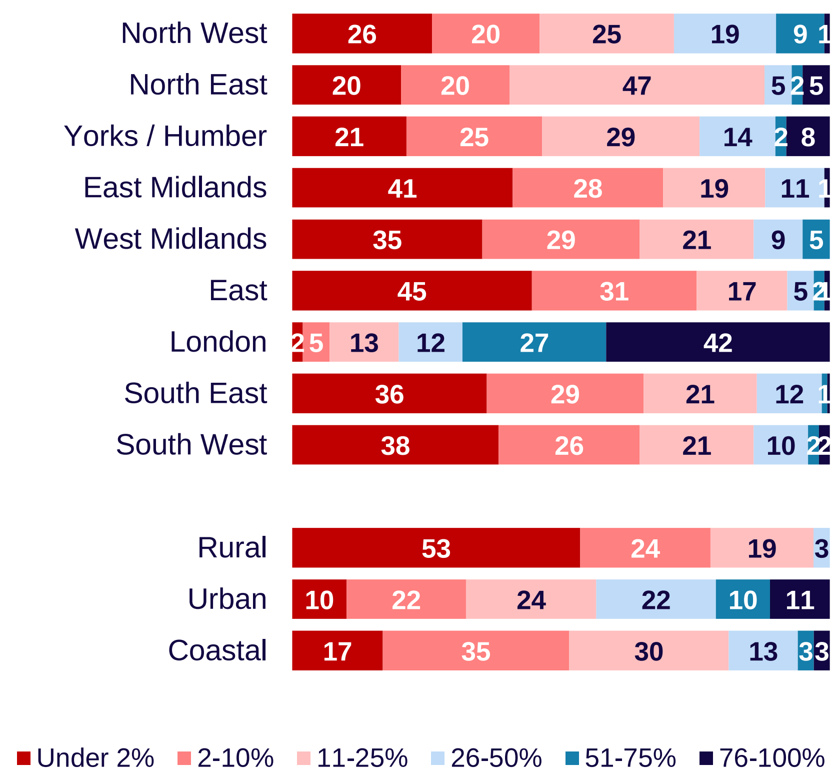
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. **Base size below 50 (greyed out)*

Transport used for main part of journey – Public transport

Proportion of visitors using the relevant form of transport for the main part of their journey

Travel by public transport is common for urban attractions, especially those based in London. Categories of attractions that are more likely to be located in towns/ cities (e.g. museums/ galleries) follow the same trend.





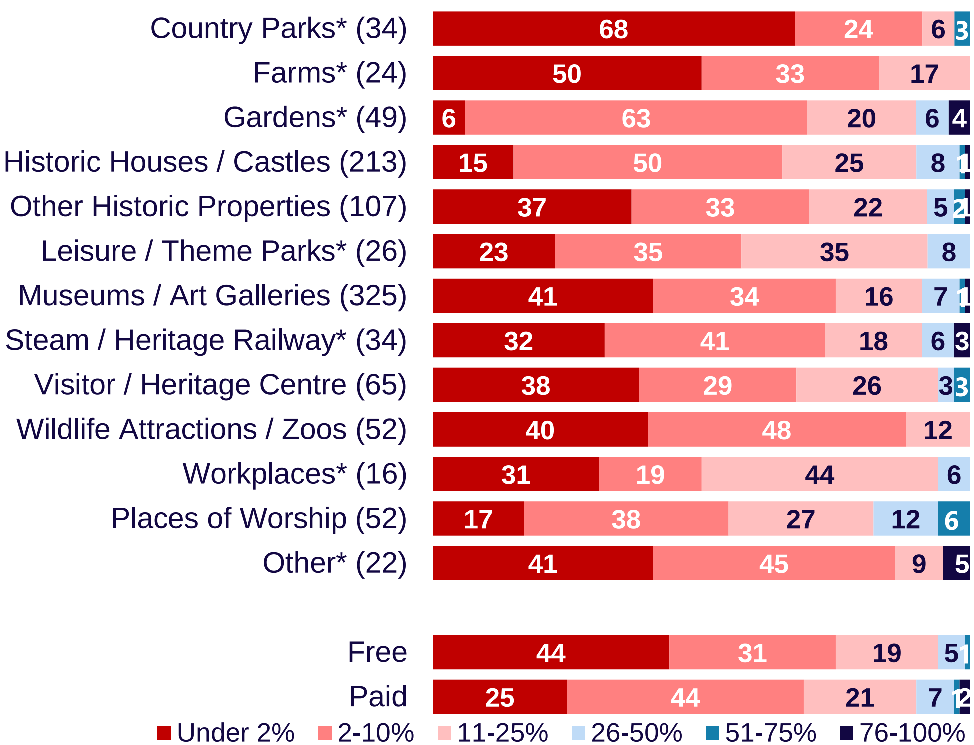
Base: All answering public transport question (1,032)

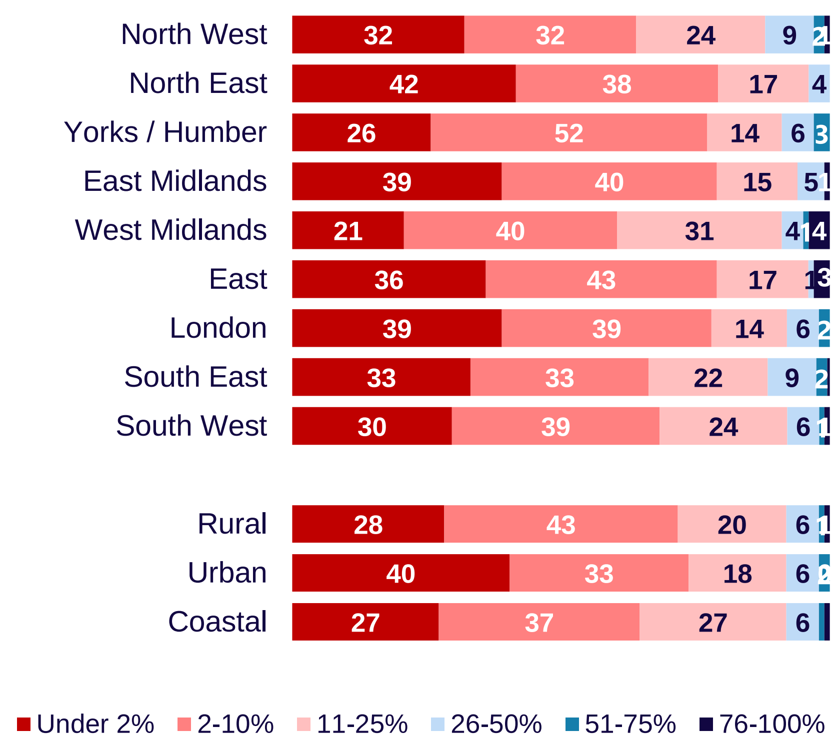
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Transport used for main part of journey – Coach tour

Proportion of visitors using the relevant form of transport for the main part of their journey

Use of coach tours is highest for gardens, historic houses/ castles and places of worship. Coach tours are more commonly taken to rural or coastal attractions, which may be more difficult to reach by public transport.





Base: All answering coach tour question (1,019)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

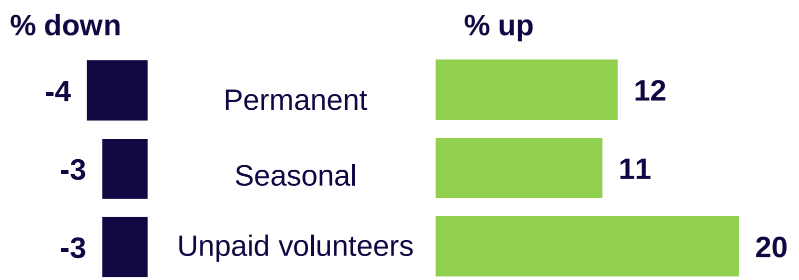
VisitEngland

Employment trends

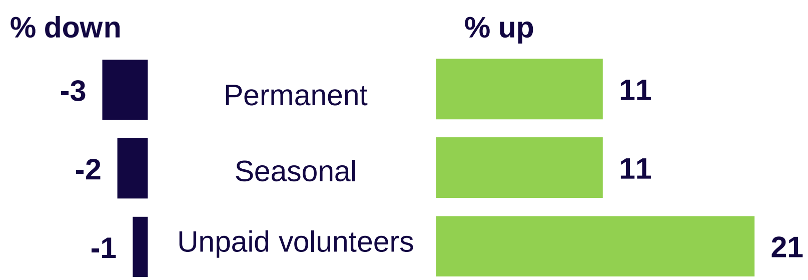
Employment trends

Proportion of attractions employing each type of employees	
Permanent staff	85%
Seasonal staff	64%
Unpaid volunteers	86%

Change in employees since 2015



Anticipated change in employees in 2017



Employment within the attractions sector was fairly buoyant in 2016, with at least three times as many attractions increasing their permanent and seasonal staffing levels as those reducing.

Furthermore, only 4% of attractions reduced their permanent staffing levels in 2016, compared with 7% in 2015.

This trend for growth looks set to continue into 2017, with 11% of attractions anticipating an increase in permanent and seasonal staff.

Reliance on unpaid volunteers has also continued to increase, with 86% of attractions benefiting from volunteers and 1 in 5 attractions reporting more volunteers than in 2015. This growth is anticipated to continue at a similar pace in 2017.

Base: All answering employment questions (c.1,200)

Employment trends – Permanent employees summary (2015-2016)

% down	2015 to 2016	% up	% any Perm in 2016
-5	Country Parks* (41)	15	95
-3	Farms* (35)	20	100
0	Gardens (56)	25	96
-4	Historic Houses / Castles (239)	11	98
-3	Other Historic Properties (122)	13	85
-10	Leisure / Theme Parks* (30)	40	97
-7	Museums / Art Galleries (397)	7	75
-3	Steam / Heritage Railways* (37)	14	65
-3	Visitor / Heritage Centres (74)	15	76
0	Wildlife Attractions / Zoos (64)	16	97
0	Workplaces* (16)	19	81
0	Places 0f Worship (52)	13	79
-7	Other* (29)	3	83

% down		% up	% any Perm in 2016
-6	Free	9	79
-3	Paid	14	88

% down	2015 to 2016	% up	% any Perm in 2016
-3	Under 20k visits	6	69
-5	20k-50k visits	9	93
-5	50k-200k visits	18	100
-7	Over 200k visits	27	100

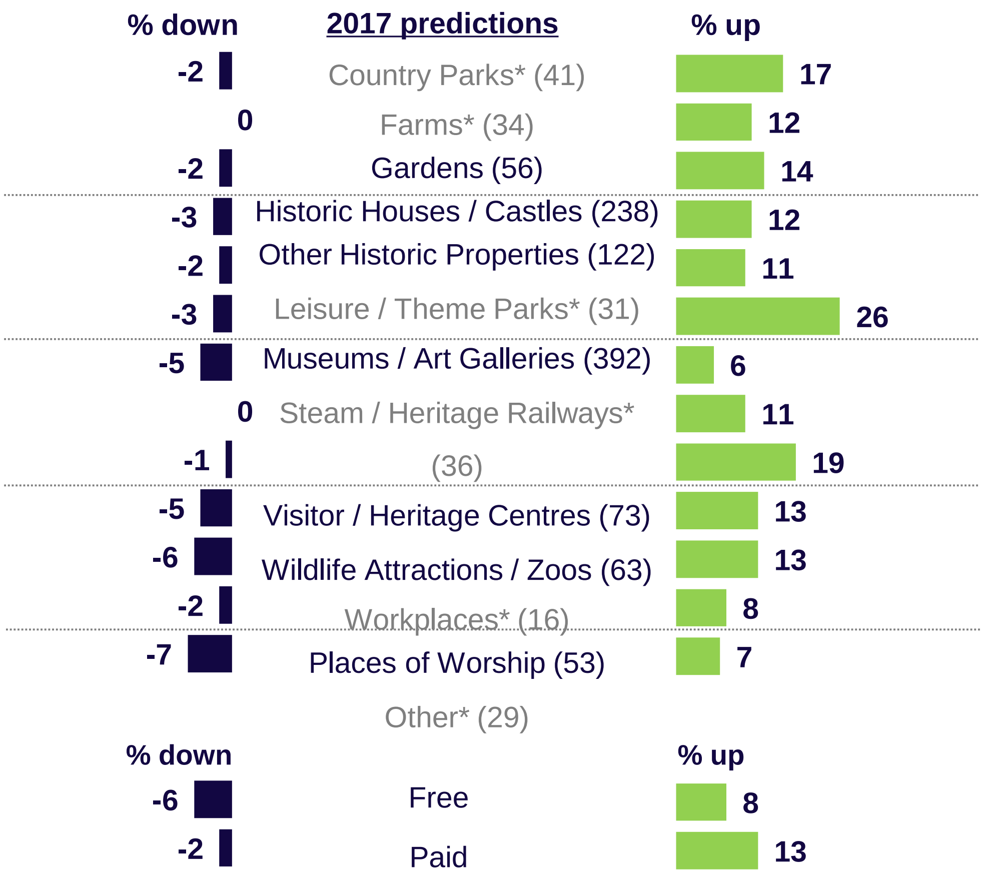
In 2015 permanent staffing levels were growing at an overall level, but certain categories of attractions were still reporting significant reductions in permanent staff. This has stabilised in 2016, with growth in permanent staff across nearly all categories (only 'other' attractions, which is a very small category, see the balance tip slightly the other way).

The level of change in staffing increases with the size of the attraction, with large attractions (with over 200k visitors) being the most likely to report increases and decreases in permanent staff.

Reflecting a couple of years of strong growth, 40% of Leisure/ Theme Parks report an increase in permanent staff in 2016, although this category is also the most likely to report a reduction in staff (and has a relatively small base size).

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Employment trends – Permanent employees summary (2017 predictions)



Predictions for 2017 permanent employment trends follow the same pattern as actual changes in 2016, with larger attractions and those charging for entry anticipating greater growth in permanent staffing.

Visitor / heritage centres are bullish about likely increases in permanent employment in 2017 – expecting a higher level of growth than seen in 2016.

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Employment trends – Seasonal employees summary (2015-2016)

% down	2015 to 2016	% up	% any Seasonal in 2016
-3	Country Parks* (40)	20	78
-12	Farms* (33)	24	88
-2	Gardens (52)	29	87
-3	Historic Houses / Castles (241)	10	86
-2	Other Historic Properties (118)	8	75
-10	Leisure / Theme Parks* (30)	33	97
-3	Museums / Art Galleries (382)	6	41
0	Steam / Heritage Railways* (37)	14	51
-4	Visitor / Heritage Centres (69)	4	59
0	Wildlife Attractions / Zoos (59)	22	81
0	Workplaces* (15)	13	33
0	Places of Worship* (49)	8	45
-4	Other* (28)	7	68

% down		% up	% any Seas in 2016
-3	Free	7	45
-3	Paid	13	76

% down	2015 to 2016	% up	% any Seasonal in 2016
-2	Under 20k visits	3	48
-3	20k-50k visits	10	70
-4	50k-200k visits	18	79
-3	Over 200k visits	24	85

Overall the changes in seasonal staff mirror permanent staffing trends, with seasonal staffing increasing most amongst larger and paid attractions.

Leisure/ Theme Parks and Farms are the most likely to have increased seasonal staffing levels. They are also the most likely to report reductions, but it is possible that these staff were made permanent given the increase in permanent staff within these categories. It should also be noted that base sizes for these categories are low.

There were also strong increases in seasonal staff at Gardens and wildlife Attractions/ zoos.

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Employment trends – Seasonal employees summary (2017 predictions)

% down	2017 predictions	% up
-5	Country Parks* (40)	15
-3	Farms* (31)	23
-6	Gardens (51)	27
-2	Historic Houses / Castles (239)	13
-2	Other Historic Properties (118)	11
0	Leisure / Theme Parks* (30)	27
-2	Museums / Art Galleries (377)	5
-3	Steam / Heritage Railways* (37)	11
-1	Visitor / Heritage Centres (69)	12
-2	Wildlife Attractions / Zoos (60)	18
0	Workplaces* (14)	14
0	Places of Worship* (48)	8
0	Other* (28)	11

% down		% up
-2	Free	8
-2	Paid	13

% down	2017 predictions	% up
-1	Under 20k visits	5
-3	20k-50k visits	9
-4	50k-200k visits	16
-2	Over 200k visits	26

All categories expect to see growth in seasonal staff in 2017, with 27% of gardens predicting an increase.

Anticipation of cuts in seasonal workforce is lower than it is for permanent staffing.

Charging attractions and those with over 200k visits per annum are more likely to feel that they will take on additional seasonal staff in 2016.

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Employment trends – unpaid volunteers summary (2015 to 2016)

% down	2015 to 2016	% up	% any volunteers in 2016
-5	Country Parks* (40)	40	92
-6	Farms* (31)	16	67
0	Gardens (51)	39	92
-5	Historic Houses / Castles (239)	15	90
-2	Other Historic Properties (127)	13	83
0	Leisure / Theme Parks* (27)	0	19
-3	Museums / Art Galleries (433)	20	90
0	Steam / Heritage Railways* (37)	24	95
-1	Visitor / Heritage Centres (82)	16	80
-2	Wildlife Attractions / Zoos (60)	33	95
0	Workplaces* (17)	12	47
-5	Places of Worship (58)	24	98
-3	Other* (30)	17	63

% down		% up	% any volunteers in 2015
-3	Free	23	87
-3	Paid	17	85

% down	2015 to 2016	% up	% any volunteers in 2016
-3	Under 20k visits	15	89
-2	20k-50k visits	18	87
-2	50k-200k visits	25	85
-4	Over 200k visits	31	82

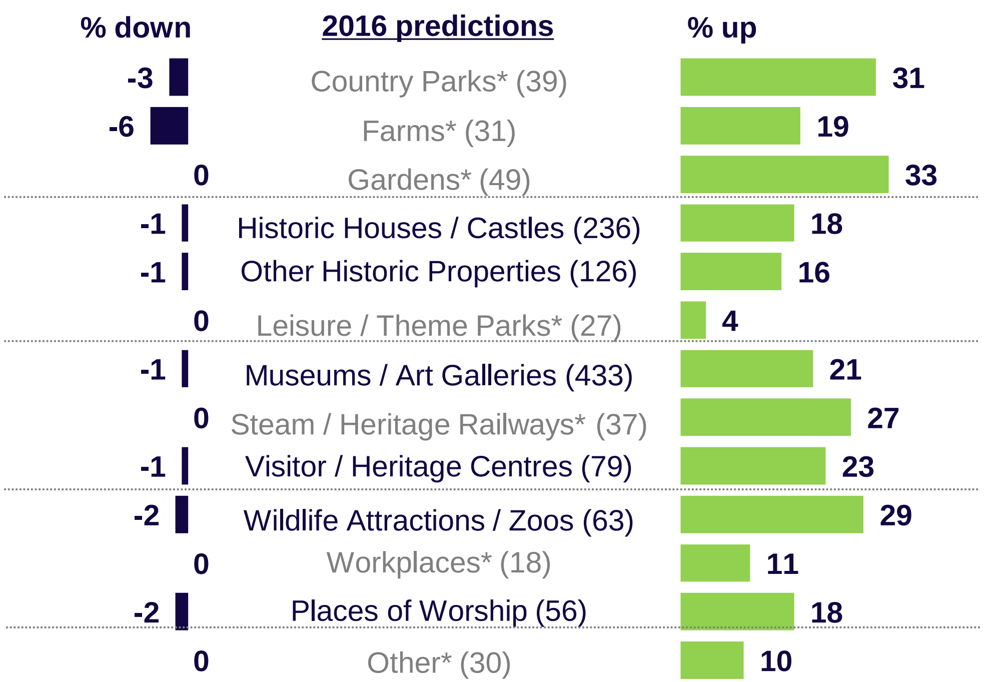
In line with predictions made in 2015, use of unpaid volunteers at attractions has continued to grow.

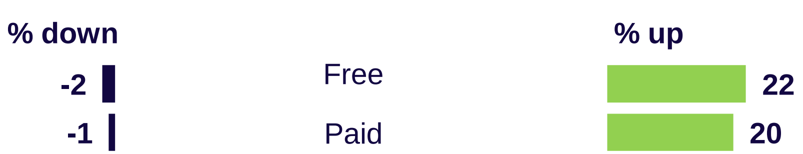
Increases are particularly driven by Country Parks, Gardens and Wildlife Attractions/ Zoos.

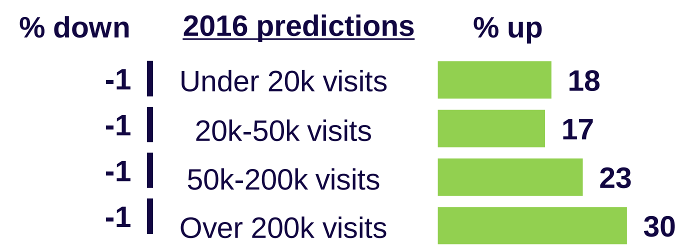
Once more, it is larger attractions that have made the biggest gains in unpaid staffing levels. However, in contrast with permanent and seasonal staffing, it is free attractions that were more likely to gain volunteers.

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Employment trends – unpaid volunteers summary (2017 predictions)







Predictions for taking on more volunteers in 2017 reflect the reported patterns of behaviour in 2016.

Gardens, Country Parks, Wildlife Attractions/ Zoos and Steam/ Heritage Railway categories have strong intentions to increase their pool of volunteers.

Most categories feel bullish about their retention of volunteers in 2017.

Base: All answering employment questions (c.1,200)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. *Base size below 50 (greyed out)*

Appendix

VisitEngland

Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2016

VisitEngland

bdrc continental

Please help VisitEngland establish trends in the attractions' sector in 2016 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 AND YOU WILL BE ENTERED INTO A PRIZE DRAW TO WIN £100.**

All information you provide will be treated in strictest confidence (we just ask permission to publish visitor numbers at Section 5.1). If there is any information you are unable to provide, you can skip this question, but we appreciate you completing as much of the questionnaire as possible.

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by **1st May 2017** 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:	Tel:	ID:
E-mail:	Name of Attraction:	User Name:
Position:	Website:	Password:
Address:	E-mail/ telephone for prize draw if different from the above:	Serial:

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

SECTION ONE – ATTRACTION DETAILS

1.1 In past years, 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 2015, 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 2015 visitor numbers: ☐ , ☐☐☐ , ☐☐☐

2.2 What were your visitor numbers during the 2016 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 2016 (paid and free) fell into each category? Adults% ☐☐☐

Children % ☐☐☐

TOTAL 100%

2.4 For 2015, 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 2016?

Number of school children ☐ , ☐☐☐ , ☐☐☐ Is this number: Exact? ☐ An Estimate? ☐

2.5 Did you charge for admission to the main attraction in 2016? Yes ☐ No ☐

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2016 (including VAT): Adult £☐☐ . ☐☐ p (£ in 2015) Child £☐☐ . ☐☐ p (£ in 2015)

2.7 Origin of visitors:

(a) For 2015, your organisation provided us with a percentage of visitors from overseas of %

i) What percentage of total visitors in 2016 do you estimate were from overseas? ☐☐☐ %

ii) Compared with 2015, was the number of visitors from overseas in 2016: Up ☐ Down ☐ Similar ☐

(b) For 2015, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2016 do you estimate lived locally or within day trip distance of your attraction? ☐☐☐ %

ii) Compared with 2015, was the number of visitors living locally or within day trip distance in 2016:

Up ☐ Down ☐ Similar ☐

2.8 Approximately what proportion of your visitors use each of the following types of transport for the main part of their journey to reach your attraction? (One response per row)

	Under 2%	2-10%	11-25%	26-50%	51-75%	76-100%
Car/motorbike	☐	☐	☐	☐	☐	☐
Coach tour	☐	☐	☐	☐	☐	☐
Public transport *(Train, public bus underground etc.)*	☐	☐	☐	☐	☐	☐

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

(a) How did the attraction's gross revenue in 2016 compare with 2015? Up ☐ Down ☐ Similar ☐

(b) What was the percentage increase / decrease? ☐☐☐ %

3.2 Which of the following did your main attraction offer in 2016?

Membership scheme *(Members/Friends/Season Tickets)*	☐	Corporate events	☐	Public venue hire *(e.g. weddings)*	☐
Public events *(outside usual operation)*	☐	Temporary exhibitions	☐	Multi-attraction pass *(e.g. London pass, other city pass)*	☐
Late or unusual opening hours	☐	None of these	☐		

3.3 Compared with 2015, was expenditure on marketing activities in 2016: Up ☐ Down ☐ Similar ☐

3.4 Which of the following digital communications did your main attraction offer in 2016?

Website	☐	Online booking facility *(tickets, events)*	☐	Facebook page	☐	Instagram /Pinterest	☐	None of these	☐
Separate mobile website	☐	E-newsletters	☐	Twitter account	☐	Other social media	☐		
Mobile apps	☐	Online blogs	☐	Youtube	☐				

3.5 In 2016, 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 2015, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2016 (including yourself, working owners and self employed)…?:

Permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Unpaid volunteers:* Up ☐ Down ☐ Similar ☐ None ☐

Seasonal: Up ☐ Down ☐ Similar ☐ None ☐

4.2 And compared with 2016, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2017 to be:

Permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Unpaid volunteers:* Up ☐ Down ☐ Similar ☐ None ☐

Seasonal: 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 sector trends.

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 Historic England (previously known as English Heritage) uses the heritage data from this survey. Can we pass on data from your attraction for this purpose? Yes ☐ No ☐ Not a Heritage attraction ☐

5.3 From time to time local destination organisations request data to inform tourism development and planning locally. Can we pass on data from your attraction to organisations representing your area for this purpose? Yes ☐ No ☐

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 **1st May 2017** 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 McPhie (VisitEngland, t: 0207 578 1466, e: annualattractionssurvey@visitengland.org) or Henry Cuff (BDRC Continental, t: 0207 400 1022, e: henry.cuff@bdrc-continental.com)