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# Visitor Attraction Trends in England 2022

July 2023

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# 1. Background

# 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.

We also extend thanks to Professor Candlin at Birkbeck University who manages the Museums Closures Mapping project, which is referenced in this research.

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# Introduction

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

## 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.

BVA BDRC 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 strong 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 large 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, 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.”*



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## 2. Headlines

# 2022 Visitor Attraction Trends

Attractions in England reported a 42% increase in total visits from 2021 to 2022, continuing the sector's recovery following the COVID-19 pandemic. However, visit volume remained 35% lower than in 2019.



## +6%

**2022 adult admission fees** increased in line with the inflation rate at the end of 2021/ Q1 2022 when most prices would have been set.



## +29%

Driven by this increase in visits and the admission price rise, sites reported a substantial boost to **gross revenue** in 2022, compared with 2021.

### Admissions volume for participating attractions

2022 and 2021 visitor volume was provided through the survey

\* 2020 and 2019 visitor volume is an estimation based on the sector trends recorded in 2020 and 2021.

	2019	2020	2021	2022
Number of visits	257.52 million*	90.13 million*	117.17 million	166.52 million
Annual % change in visits	/	-65%	+30%	+42%
% difference from 2019 visit volume	/	-65%	-55%	-35%

# Headlines: Impact of Rising Costs

**Around two thirds of attractions have been affected by increases in supplier fees (69%) and rising energy costs (64%) and half by higher wages (51%).**

The impact of these inflationary factors increases with attraction size, with sites attracting more than 100k visitors being the worst hit. Charging sites are more likely to report an impact.

The response to rising costs varies according to the source of the cost and type of attraction. Most free attractions have absorbed the higher costs, although 14% have offset higher supplier fees (e.g. catering) by increasing prices for visitors. The response of charging attractions is more varied. About a third of those affected passed on higher energy charges to visitors, and just under half increased their prices to cover higher wages and supplier costs.

It is fairly uncommon for sites to have reduced the services they offer in response to rising costs.

**Although rising costs clearly pose a challenge, this does not compare to the impact of COVID-19.** Fewer attraction closures were reported in 2022 compared with previous years since the start of the pandemic – 4% were permanently or temporarily closed throughout the year, compared with 6% in 2021 and 10% in 2020.

Partial closure also reduced in 2022, and only 2% of sites said they were unable to open because it was not profitably to do so, compared with 7% in both 2020 and 2021.



Red telephone box with no people and dome nearby, London, England. ©VisitBritain/Sam Barker

# Headlines: Visit Volume

**Overall, attractions in England reported a 42% annual increase in total visits from 2021 to 2022**, building on the recovery that began in 2021. This reduced the gap in visitor admissions to 35% less than was recorded in 2019.

**While the recovery in 2021 was predominantly driven by domestic visits, the return of the overseas audience was a key contributor to sector growth in 2022.**

According to the International Passenger Survey, inbound visits to the UK increased from 6.4 million in 2021 to 31.2 million in 2022, closing the gap on 2019 figures, with inbound tourism 24% down on 2019. Over half of English attractions saw the benefit of this, with the average growth of international visits being 280%.

**London, as a key destination for international visitors, benefited the most from the return of overseas tourists, with visitor volume increasing by 144%.** In comparison, other regions saw an average growth of between 16% and 42%.

**Post pandemic recovery for Museums/ art galleries had been much slower than the sector average up to the end of 2021, but they caught up in 2022, with a 114% increase in visitor admissions.** In contrast, Country Parks had been the least affected by the pandemic and were the only category to report a decline in 2022 (of -2%).

**There was a resurgence of school visits in 2022, with volume growing by 204%**, after very limited recovery from the effects of the pandemic in 2021 (+6%).

**The increase in child admissions was more modest at 25%.**



# Headlines: Revenue, Admission Pricing & Funding

**Gross revenue at visitor attractions increased by 29% in 2022. Indexing average levels of revenue growth suggests that this now exceeds pre-pandemic levels.**

This growth was fuelled by the higher visitor volume (up 42%), higher entrance prices (at charging attractions), and other income streams.

Inflationary increases in staff wages, energy, supplier costs etc. during 2022 will have somewhat offset the higher revenue meaning the impact on profit margins is likely to be more modest.

**Adult and child admission fees both increased by 6% in 2022.** While this is lower than market inflation in 2022 of 9.2%, based on the Consumer Price Index, most prices will have been set at the end of 2021, or in early 2022, when inflation was 6%.

The average adult (high season) admission price was £10.03 and the average child price was £6.57.

**37% of attractions sought additional funding during 2022.** Despite fewer applications for funding, those applying were less successful in securing what they needed compared with 2021.



Large stone pillars arranged in circle on grass. Sunset, Salisbury, Wiltshire, England. ©VisitBritain/Stephen Spraggon

# Headlines: Marketing & Digital Communication

**Only 7% of attractions enforced the need to pre-book tickets in 2022, down from 11% in 2021 and 27% in 2020. Instead, we saw more sites move towards a policy of encouraging pre-booking.**

**Marketing expenditure increased for the second year running, with 39% of attractions reporting an increase in their budgets.** Sites based in London were the most likely to increase marketing expenditure, with 57% of sites based in the capitol doing so.

**Use of social media continues to grow, with 94% of visitor attractions using any social media or apps in 2022, up by 4% in the last 2 years.**

**Sites typically use 3 forms of social media,** with Facebook (90%), Twitter (62%) and Instagram or Pinterest (61%) being the most common. However, adoption of these platforms for marketing communications has plateaued, and use of YouTube has declined from 41% using in 2020, down to 34% using in 2022.

**TikTok is being used by 24% of attractions,** rising to 39% of those with admissions exceeding 100k visits.

During the COVID-19 pandemic lockdowns a substantial number of attractions developed new content, such as online tours, home-schooling content and adult online learning opportunities in order to support and grow their audiences. By 2022 this had reduced substantially. Instead, there was more of a focus on digitising collections and developing the online retail offer.



Two white alpacas on green pasture near people, Harrogate, England. ©VisitBritain/Sam Barker

# Headlines: Employment

**In the first half of 2023 when this research was undertaken, nearly three quarters (73%) of English attractions were back to 2019 staffing levels – a slight improvement on the 67% reported in 2021.**

The proportion of attractions that have returned to their 2019 level of staffing is fairly similar across attractions, with a couple of notable departures. Having remained relatively buoyant during the pandemic, Country Parks staffing is closer to pre-pandemic levels than average, with 85% of sites back to 2019 staffing numbers. 'Other' attractions (e.g. model villages) were the worst hit during the pandemic and have seen the slowest recovery, so it is unsurprising that staffing remains significantly below pre-pandemic levels with only 50% of site back up to full staffing.

**The picture in 2022 was very much one of growth for attraction staffing. There was a net increase (% increase minus % decrease) in all types of staff, in particular in unpaid volunteers.**

Looking ahead to 2023, a more modest expansion in staff teams is expected, with the largest growth predicted to again come from unpaid volunteers.

Farms and Workplaces are the most likely to be looking to grow their paid staff teams, where as historic properties are the most likely to predict an increase in volunteers in 2023.



Two boys play in the grounds of Blenheim Palace, Oxfordshire, England.  
©VisitBritain/Aimee Bracken

# Headlines: Access & Sustainability

**Accessibility is becoming a priority, with over half of attractions (54%) investing in provisions during 2022.**

The most investment common is in staff training, with nearly 2 in 5 sites (39%) including this within their training schedule; just over a fifth made changes to their built environment/ amenities/services (22%) and a similar proportion improved the accessibility of their communications (21%).

**The majority of attractions (62%) now have an environmental strategy and/or budget.** This varies by region, with North East and London based attractions more likely to have an environmental strategy or budget in place.

We also see more focus on environmental issues amongst attractions that charge for entry, which are more than twice as likely to have a budget allocated to meeting environmental objectives as free attractions.

Energy saving initiatives, such as low energy lighting and adjustable thermostats, are popular amongst attractions, and the majority of sites this is relevant to already have or are actively planning to install this. However, there are plenty of areas for potential enhancements to sustainable practice. The most popular for the future are adding electric car charging points, switching to smart meters and using renewable electricity/ heating sources.



Moon seat, Anne Hathaway's Cottage, Stratford-upon-Avon, England. ©VisitBritain/Nemorin



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## 3. Context

# 2022 Context: Weather Summary

**Overall 2022 was the warmest year on record for the UK and also one of the sunniest.**

**The start of the year was milder than usual.** January was fairly dry, but February brought unsettled weather with three named storms (Dudley, Eunice and Franklin).

**Spring was fairly unremarkable,** except for an unusually sunny March and a continuation of slightly elevated temperatures.

**The Summer months were warm and dry** compared with historical data. A new UK record temperature of 40.3°C was recorded in July, but it was June and August that were particularly sunny.

**Autumn 2022 was the third warmest on record, but with above average rainfall.** November was a particularly wet month, with the far South East experiencing double the average level of rainfall, though the far North of England was less wet.



Close up of person holding ice cream cone on pier, Brighton, East Sussex, England. ©VisitBritain

# 2022 Context: Inbound tourism

Inbound tourism began to recover in 2022, following two years of decline during the COVID-19 pandemic.

According to the International Passenger Survey, the UK welcomed 31.2 million visits in total during 2022, with visit volume strengthening throughout the year.

While the number of visits remained 24% down on pre-pandemic levels, the volume of international visitor nights was only 9% lower, and spend was just 7% below 2019 (17% lower in real terms, taking inflation into account).

The top inbound markets for visits was the USA, which surpassed pre-pandemic levels by 2%. Other key markets were France, Republic of Ireland, Germany and Spain. In total, visits from Europe accounted for 67% of total inbound visits to the UK.

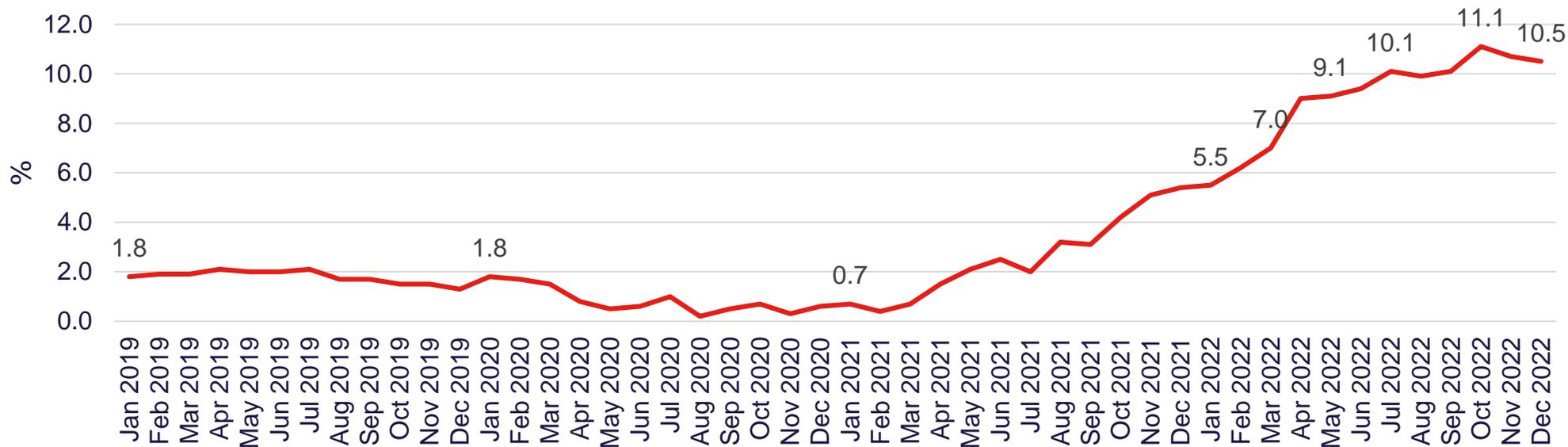
Total	2018	2019	2020	2021	2022	% change vs 2019
Visits (000)	40,283	40,857	11,101	6,384	31,244	-24%
Spend (£m)	£26,508	£28,448	£6,210	£5,646	£26,497	-7%
Nights (000)	291,324	289,628	-	93,522	262,864	-9%

# 2022 Context: Cost of living

UK inflation, as measured by the Consumer Prices Index (CPI), started to creep up during late Spring 2021 and rose fairly steadily throughout the rest of 2021 and 2022, peaking at 11.1% in November 2022. The average inflation rate for 2022 based on CPI was 9.2%.

This had an impact on how UK consumers felt about their own personal financial situation, measured in VisitBritain's Domestic Sentiment Tracker from June 2022. This research showed that in the second half of 2022 around a quarter of UK consumers had been hit hard by the rise in the price of consumer goods, with a further 50% feeling cautious about what they spent.

### Consumer Prices Index





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## 4. Visitor admission trends

# Overall Visitor Admission Trends

Overall, attractions in England reported a 42% annual increase in total visits from 2021 to 2022 continuing the recovery that started in 2021.

However, admissions volume was still 35% lower than in 2019.

While the recovery in 2021 was predominantly driven by domestic visits, the return of the overseas audience was a key contributor to sector growth in 2022.

According to the International Passenger Survey International visits to the UK increased from 6.4 million to 31.2 million in 2022, closing the gap on 2019 figures, with inbound tourism 24% down on 2019.



## Admissions volume for participating attractions

2022 and 2021 visitor volume was provided through the survey. \* 2020 and 2019 visitor volume is an estimation based on the sector trends recorded in 2020 and 2021.

	2019	2020	2021	2022
Number of visits	257.52 million*	90.13 million*	117.17 million	166.52 million
% difference from 2019 visit volume	/	-65%	-55%	-35%

# Visitor Admission Trends 2022: By Attraction Category

There was a wide spread of performance in 2022, ranging from country park visits, which contracted by 2%, through to places of worship and museums/ art galleries which grew visitor admissions by a whopping 117% and 114% respectively.

The difference in fortunes is largely explained by:

- **the level of impact of the COVID-19 pandemic in 2020** (which was relatively minor at Country Parks, explaining relative flat lining of visit volume in subsequent years)
- **dependence on international tourism**, which fell away after the pandemic, but began to return in 2022, benefitting the large national museums/ galleries in particular
- **The indoor/outdoor nature of the category** – as the very hot summer and wet winter reduced appeal at outdoor attractions, such as country parks, gardens and theme parks.

## Visitor admission trends: By Attraction Category

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Total Average</b>	+42	+30	-65
Country Parks (52)	- 2	+1	-7
Farms (30) < <sup>50</sup>	+17	+58	-50
<b>Gardens (83)</b>	+7	+40	-40
<b>Historic Houses/Castles (292)</b>	+32	+46	-57
<b>Other Historic Properties (117)</b>	+51	+57	-74
Leisure/Theme Parks (18) < <sup>50</sup>	+6	+47	(< <sup>10</sup> )
<b>Museums/Art Galleries (449)</b>	+114	+18	-76
Steam/Heritage Railways (26) < <sup>50</sup>	+7	+118	-55
Visitor/Heritage Centre (77)	+49	+46	-66
Wildlife Attractions/Zoos (66)	+20	+32	-41
Workplaces (25) < <sup>50</sup>	+55	+51	-56
Places of Worship (40) < <sup>50</sup>	+117	+49	-73
Other (20) < <sup>50</sup>	+25	+35	-82

<<sup>10</sup> Base size below 10 (please treat with caution)

<<sup>50</sup> Base size below 50 (please treat with caution)

\* % change is under 1%, therefore not shown

Base: All attractions providing visits data for current and previous year (1295)  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Index of Visits to Attractions: Calculation

The charts presented on the subsequent slides 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.



A couple walking beside tall stone pillars, Bath, Somerset, England. ©VisitBritain/Simon Winnall

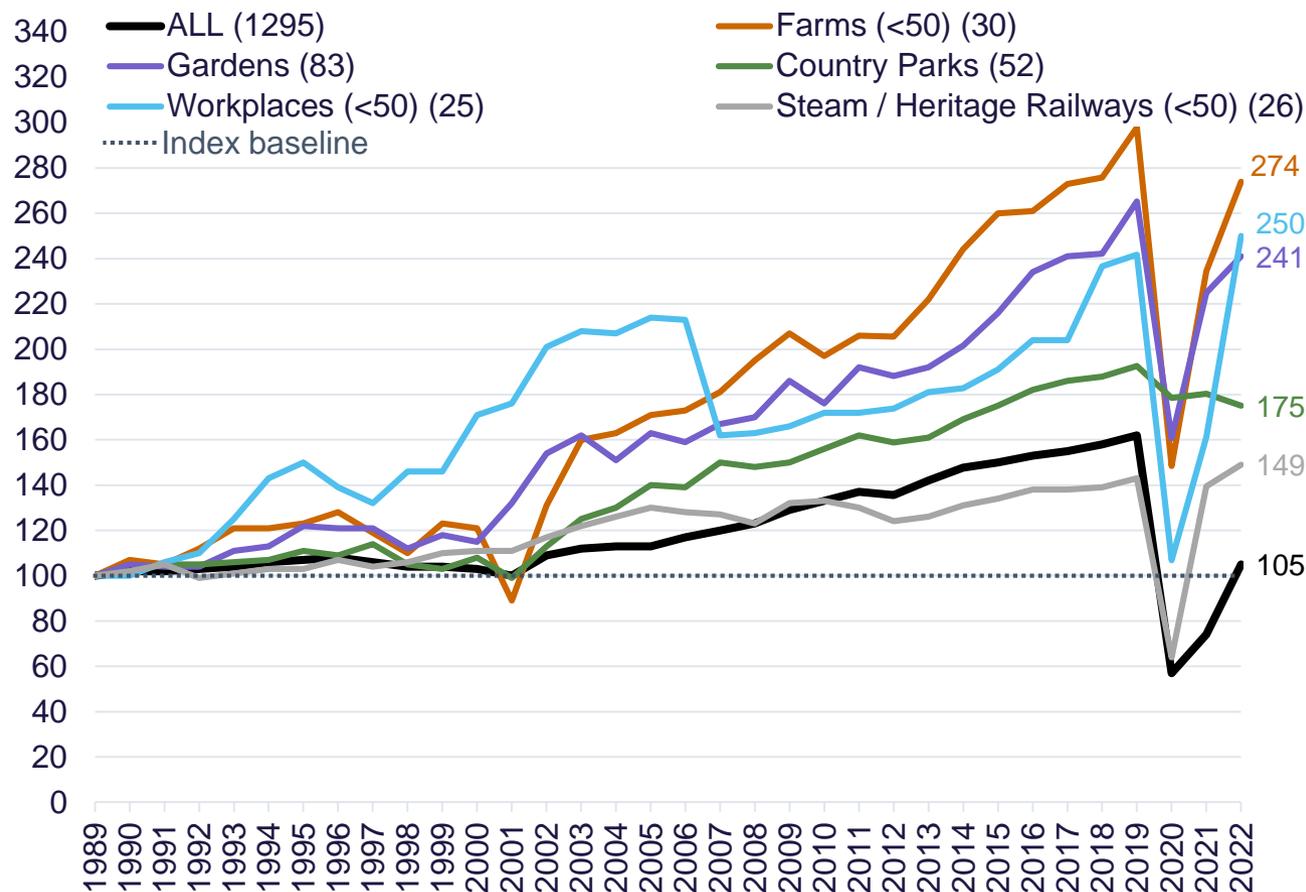
# Index of Visits to Attractions: Best Performing Sectors over the long term

This chart illustrates the best performing attraction categories over the long term.

**Across England, attractions as a whole ('all' visits) increased by 62% in the thirty years to 2019 (index of 162), followed by a substantial drop to an index of 57 in 2020. The 2021 and 2022 increases in visitor volume helped to regain ground, and the sector average now exceeds the 1989 base line, with an index of 105.**

Indexes show that both Steam/ Heritage railways and Workplaces now exceed 2019 levels, while Farms and Gardens have returned to 2017/2018 levels.

While Country Parks saw a small decline in 2022, the index shows that they remain well above the 1989 benchmark, operating at 2015 levels in terms of admissions volume.



Base: All attractions providing visits data for current and previous year (1295)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

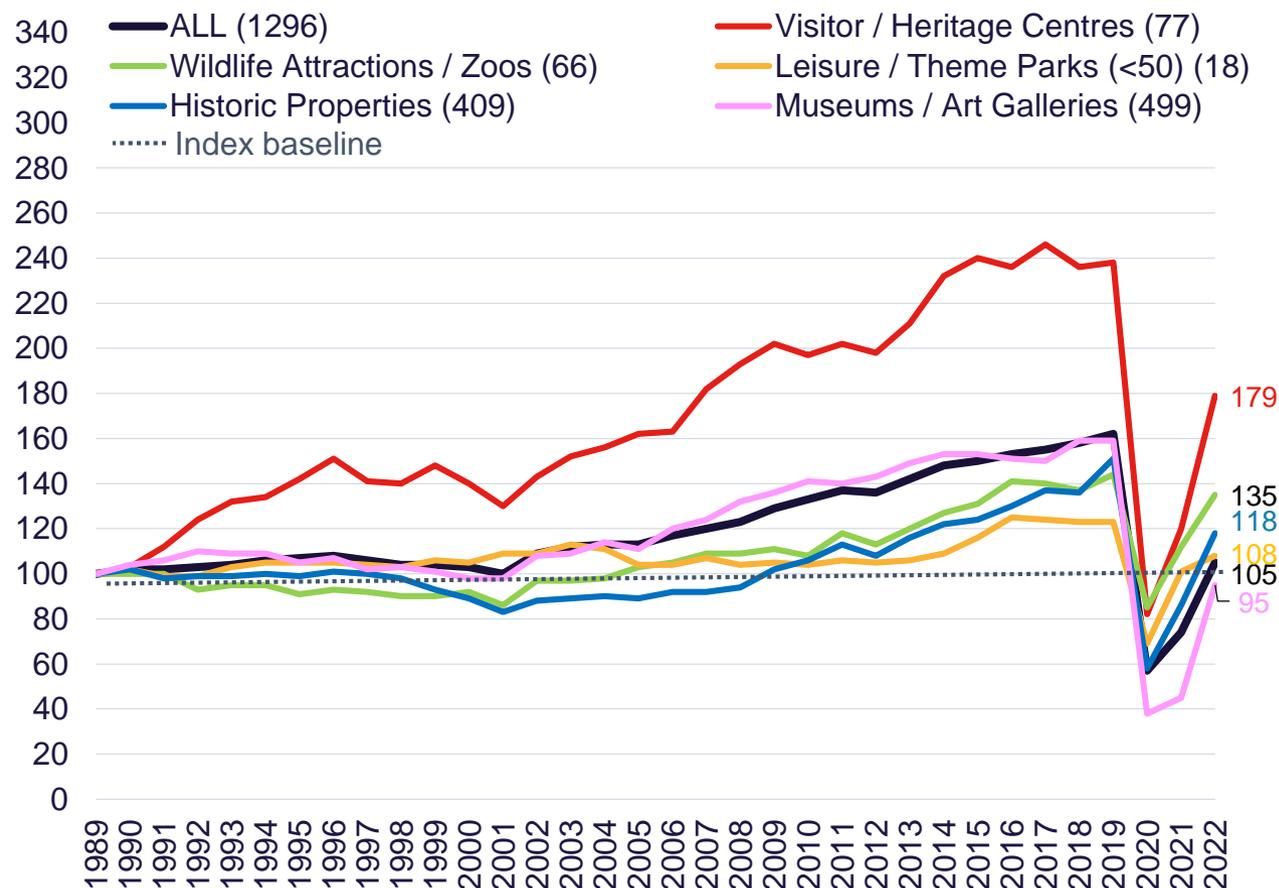
(<50) Base size below 50 (please treat with caution)

# Index of Visits to Attractions: Other Sectors performance over the long term

This chart illustrates the attraction categories which have performed less well over the long term.

Positively, all categories except for Museums/ Art Galleries are now operating above the 1989 benchmark levels in terms of visitor volume, with Museums/ Galleries just shy of this with an index of 95.

Visitor/ Heritage Centres has historically been one of the top performing attraction categories, operating 138% above 1989 levels back in 2019. Admissions volume is now at 2007 levels, but this recovery has been slower than for other high performing sectors.



Base: All attractions providing visits data for current and previous year (1295)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

# Visitor Admission Trends 2022: By Region

Most regions saw admissions growth of around 20-30%, but this was notably higher in London (141% increase) and the North West (42% increase).

With greater reliance on international tourism than other areas, London was hit hardest by the COVID-19 pandemic and saw limited recovery in 2021. The return of overseas visitors during 2022 bolstered visit volume, leading to significant year on year growth. Despite the higher percentage increase, volume remains substantially below 2019 levels.

With the attraction of its important urban cultural centres, the North West also benefitted from the increase in inbound tourism. This built on the recovery that began in 2021.

**Visitor Admission Trends 2022: By Region**

	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
<b>Total Average</b>	+42	+30	-65
<b>North West (129)</b>	+42	+57	-62
<b>North East (88)</b>	+29	+45	-68
<b>Yorks/Humber (116)</b>	+36	+45	-54
<b>East Midlands (115)</b>	+16	+22	-50
<b>West Midlands (134)</b>	+19	+30	-53
<b>East (159)</b>	+19	+29	-40
<b>London (85)</b>	+141	+12	-77
<b>South East (244)</b>	+20	+17	-58
<b>South West (225)</b>	+20	+52	-60

# Visitor Admission Recovery vs. 2019: By Region

This chart looks at the regional recovery compared with 2019 visit volume.

London was the worst hit region and recovery in 2021 was limited. However, a much stronger performance in 2022 saw the region catching up with the national average, with visit volume down by 38% compared with 2019.

The East of England was least affected by the pandemic, and has been the quickest to recover, now only 8% behind 2019 levels, and closely followed by Yorkshire & The Humber at 9% down on 2019.

## Change in visit volume vs. 2019: By region

2022 and 2021 visitor volume was provided through the survey. This was calculated for participating sites for 2021 and 2020 based on regional averages, and then converted into the percentage change.

	2019/ 2020 change [%]	2019/ 2021 change [%]	2019/ 2022 change [%]
<b>Total average</b>	-65	-55	-35
<b>North West (129)</b>	-62	-40	-15
<b>North East (88)</b>	-68	-54	-40
<b>Yorks/Humber (116)</b>	-54	-33	-9
<b>East Midlands (115)</b>	-50	-39	-29
<b>West Midlands (134)</b>	-53	-39	-27
<b>East (159)</b>	-40	-23	-8
<b>London (85)</b>	-77	-74	-38
<b>South East (244)</b>	-58	-51	-41
<b>South West (225)</b>	-60	-39	-27

# Visitor Admission Trends 2022: By Admission Charge, Area Type & Attraction Size

The sites that saw the largest declines in 2020 were free attractions and attractions based in urban areas, and these also reported the slowest recovery in 2021. However, they turned a corner in 2022 with large percentage increases in admissions – 79% for free attractions and 94% for urban attractions.

The rising cost of living may have given free attractions a boost in 2022, as research shows that consumers were looking to spend less on day trips.\*

Sites based in coastal and rural areas saw slower growth in 2022, with more UK nationals holidaying abroad rather than staycationing.\*

**Visitor Admission Trends 2022: By Admission Charge, Area Type & Size**

	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
<b>Total Average</b>	+42	+30	-65
<b>Free (414)</b>	+79	+19	-71
<b>Paid (882)</b>	+24	+37	-60
<b>Coastal (161)</b>	+16	+47	-59
<b>Rural (672)</b>	+12	+30	-47
<b>Urban (462)</b>	+94	+23	-74
<b>20,000 visits or less (577)</b>	+48	+36	-68
<b>20,001 – 50,000 visits (232)</b>	+40	+56	-66
<b>50,001 – 200,000 visits (286)</b>	+28	+39	-58
<b>Over 200,000 visits (200)</b>	+46	+26	-66

# Visitor Admission Trends 2022 Among Free Attractions and Among Paid Attractions

The chart below shows the changes by category, split by free and paid attractions.

## Visitor Admission Trends 2022: Free Attractions

Free Attractions	2021/2022 change [%]	2020/21 change [%]
<b>ALL FREE (414)</b>	+79	+19
Country Parks (23) < <sup>50</sup>	+4	+3
Farms < <sup>10</sup>	(<10)	(<10)
Gardens < <sup>10</sup>	(<10)	(<10)
Historic Houses/Castles (11) < <sup>50</sup>	+135	+35
Other Historic Properties (23) < <sup>50</sup>	+14	+27
Leisure/Theme Parks < <sup>10</sup>	(<10)	(<10)
<b>Museum/Art Galleries (252)</b>	+134	+11
Steam/Heritage Railways < <sup>10</sup>	(<10)	(<10)
Visitor/Heritage Centres (40) < <sup>50</sup>	+32	+53
Wildlife Attractions/Zoos < <sup>10</sup>	(<10)	(<10)
Workplaces < <sup>10</sup>	(<10)	(<10)
Places of Worship (31) < <sup>50</sup>	+51	+59
Other (< <sup>10</sup> )	(<10)	(<10)

## Visitor Admission Trends 2022: Paid Attractions

Paid Attractions	2021/2022 change [%]	2020/21 change [%]
<b>ALL PAID (882)</b>	+24	+37
Country Parks (29) < <sup>50</sup>	-5	*
Farms (22) < <sup>50</sup>	+19	+49
<b>Gardens (80)</b>	+7	+40
<b>Historic Houses/Castles (281)</b>	+27	+47
<b>Other Historic Properties (94)</b>	+64	+65
Leisure/Theme Parks (17) < <sup>50</sup>	+6	+43
<b>Museum/Art Galleries (197)</b>	+47	+54
Steam/Heritage Railways (25) < <sup>50</sup>	+7	+120
Visitor/Heritage Centres (37) < <sup>50</sup>	+68	+41
Wildlife Attractions/Zoos (58)	+21	+33
Workplaces (19) < <sup>50</sup>	+30	+49
Places of Worship < <sup>10</sup>	(<10)	(<10)
Other (14) < <sup>50</sup>	+55	+75

Base: All attractions providing visits data for current and previous year Paid (882) Free (413)  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

\* %change is under 1%, therefore not shown

<<sup>50</sup> Base size below 50 (please treat with caution)

<<sup>10</sup> Base size less than 10 (figure therefore omitted)

# Visitor Admission Trends 2022: Region by Admission Charge & Area Type

Results indicate that free attractions in urban areas, in particular in London and the North West experienced the greatest increases in visitor volume. However, findings should be treated with caution due to low base sizes.

## Visitor Admission Trends 2022: Regional breakdown by admission charge & area type

2021/22 change %	Free	Paid	Coastal	Rural	Urban
<b>Total Average</b>	+79	+24	+16	+12	+94
<b>North West (113)</b>	+84	+22	(<10)	+16 <50	+105
<b>North East (59)</b>	+35 <50	+25	+46 <50	+9 <50	+58 <50
<b>Yorks / Humber (87)</b>	+64 <50	+23	+6 <50	+23	+67
<b>East Midlands (82)</b>	+29 <50	+12	(<10)	+15	+24 <50
<b>West Midlands (78)</b>	+29 <50	+13	N/A	+10	+29
<b>East (121)</b>	+32 <50	+14	+19 <50	+11	+35 <50
<b>London (68)</b>	+163 <50	+99 <50	N/A	(<10)	+141
<b>South East (193)</b>	+39	+14	+15 <50	+8	+88
<b>South West (174)</b>	+20	+20	+16	+14	+55 <50

Base: All attractions providing visits data for current and previous year  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)  
 <10 Base size less than 10 (figure therefore omitted)

# Visitor Admission Trends 2022: Child Visits Summary

The volume of children visiting attractions increased by 25% from 2021 to 2022 – a smaller increase than overall admissions (42%), reversing the trend seen in 2021. This shows that while the family audience returned fastest, adult only visits to attractions are now catching up.

School trips returned in 2022, with schoolchildren admissions up by 204% compared with 2021. However, this increase is from a low base, so admissions volume still remains substantially lower than it was in 2019.

Schoolchildren accounted for 5% of admissions in 2022, a slight increase on the 4% recorded in 2021 and 2020, but still lower than in 2019 (6%).

## Change in all admissions by category

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Total Average (1295)</b>	+42	+30	-65
<b>30% or less children (578)</b>	+45	+36	-67
<b>Over 30% children (145)</b>	+44	+29	-58

## Change in volume of child admissions

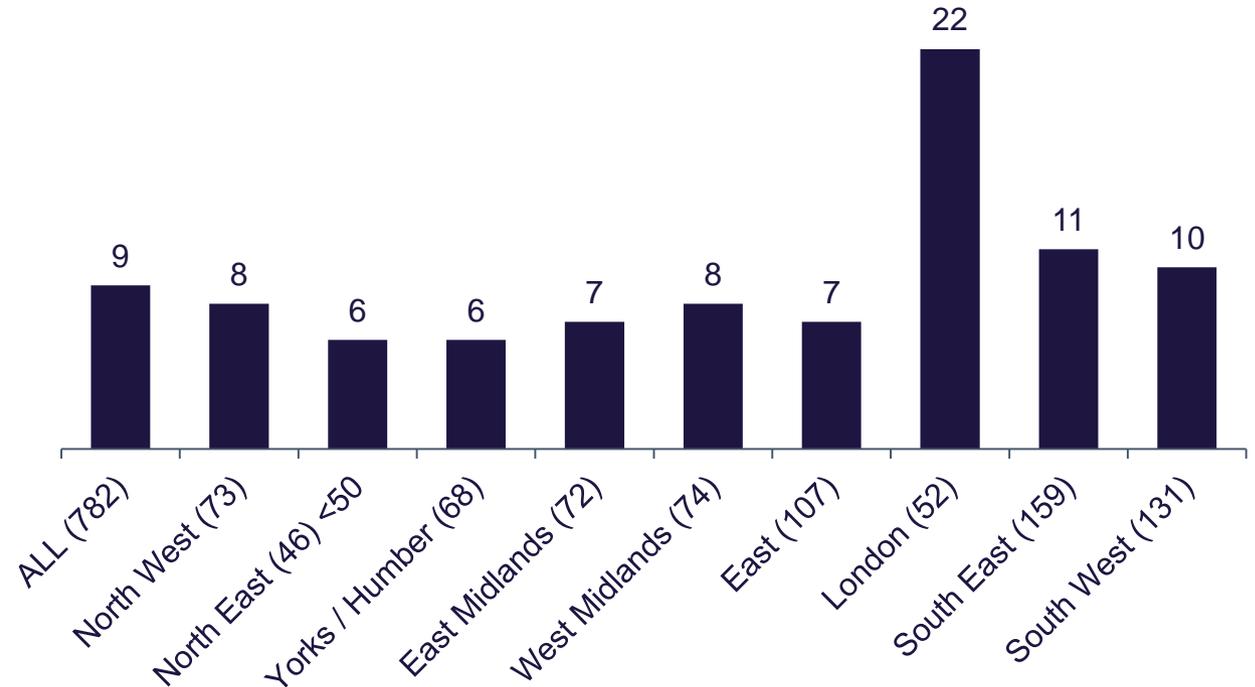
	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Child admissions (435)</b>	+25	+41	-61
<b>Schoolchildren admissions (485)</b>	+204	+6	-84

# Visitor origin profile

The average share of visitors who come from overseas quoted by attractions is 9%.

This is fairly consistent across most regions, ranging from 6% to 11%. The exception to this is London, where the average proportion quoted is 22%.

Average % of visitors coming from overseas\*



\* This chart shows the average of % visiting from overseas quoted by attractions. This doesn't represent visit volume as it doesn't take into account differences in attraction size.

Base: All providing % of overseas/ domestic visitors

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

\* Source: ONS International Passenger Survey; VisitBritain Domestic sentiment tracker.

# Visitor Admission Trends 2022: By Visitor Origin

After a two year decline in overseas visitors (down by 73% in 2020 and a further 43% in 2021), overseas visitors started to return in 2022.

According to the International Passenger Survey, inbound tourism increased from 6.4 million in 2021 to 31.2 million visits in 2022 (24% lower than in 2019). This had a direct impact on the average volume of overseas visitors to English attractions, with a 280% increase in visits.

Over half (52%) of English attractions benefitted from the increase in inbound tourism.

A slightly higher proportion (58%) of attractions reported an increase in domestic visitors, although this increase was more modest at 24% higher than in 2021.

VisitBritain's Domestic Sentiment Tracker found that most consumers felt comfortable visiting attractions by the end of Q1 2022, following caution during the pandemic. However, the rising cost of living meant that the majority were financially squeezed or felt they had to be cautious with their money by mid-2022.

## Average change in number of visits 2022 [%]

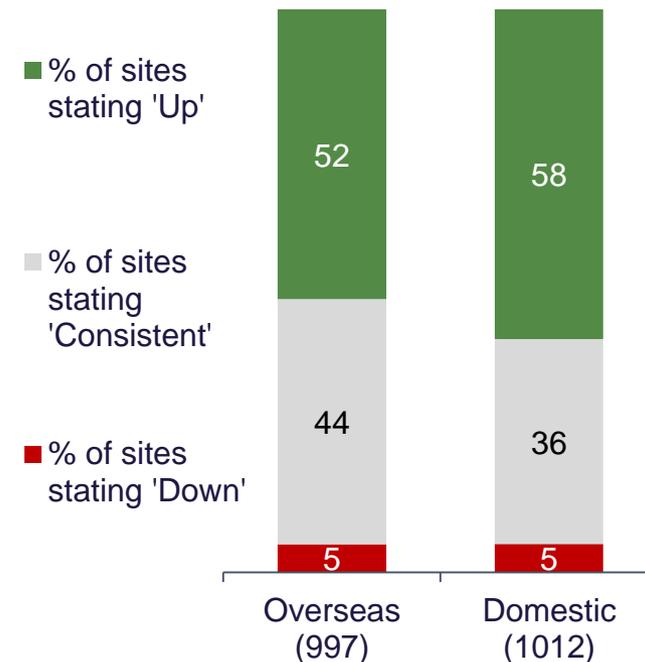


Overseas (351)



Domestic (426)

## Stated change in visits [%]



Base: All providing % of overseas/ local visitors and visits data for current and previous year

Base: All answering overseas/ local visitor perceptions question

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

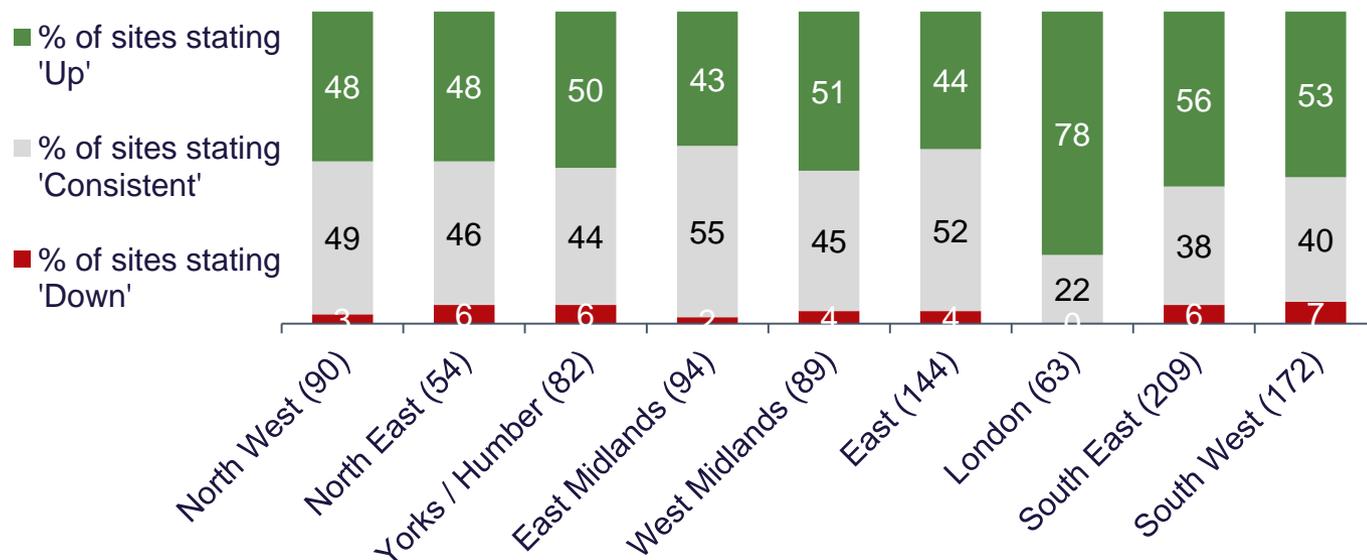
\* Source: ONS International Passenger Survey; VisitBritain Domestic sentiment tracker.

# Visitor Admission Trends 2022: Overseas Visitors by Region

There was growth in overseas visits across all regions, with a net (% reporting an increase minus % reporting a decrease) increase of over 40% across all regions.

This was most notable in London, where 78% of attractions reported an increase in international tourists.

**2021/22 Stated change in volume of overseas visitors [%]**



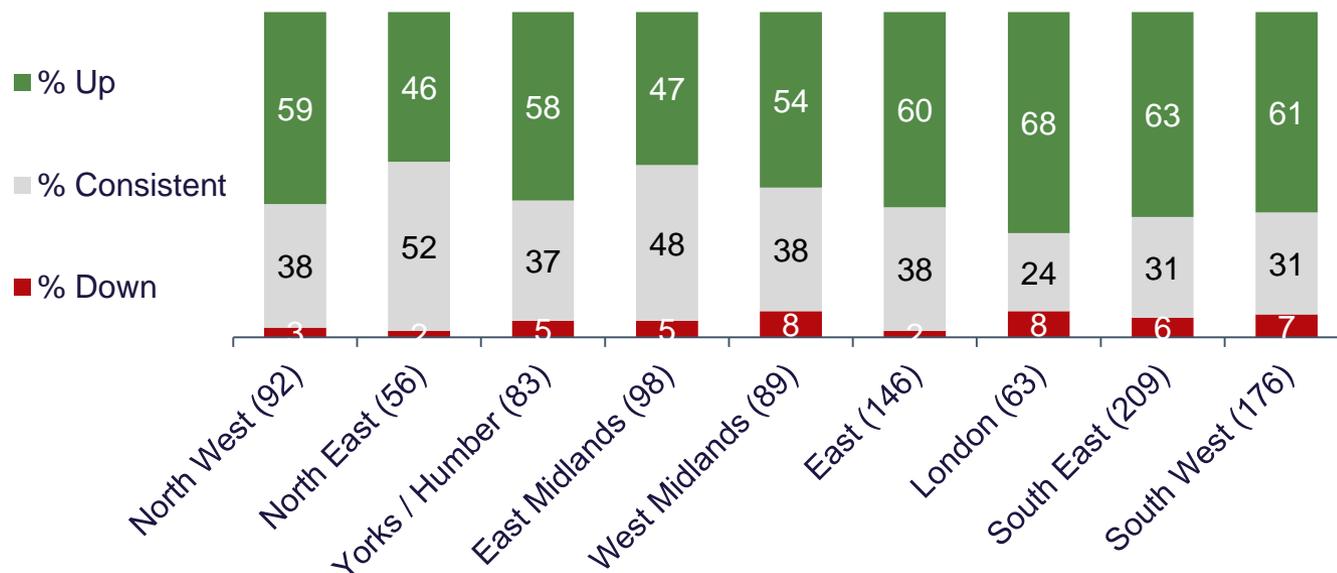
Base: All answering overseas visitor question (997)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Visitor Admission Trends 2022: Domestic Trip Visitors by Region

Domestic visits increased across all regions. London attractions were most likely to report an increase, with 68% doing so.

Following the COVID-19 pandemic, consumers were still cautious about using public transport, and in visiting indoor attractions throughout much of 2021. However, by the end of Q1 2022 most consumers felt comfortable undertaking these activities according to VisitBritain's Domestic Sentiment Tracker, increasing the pool of attraction visitors.

2021/22 Stated change in volume of local / day trip visitors [%]



Base: All answering local visitor question (1012)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.  
 \* Source: VisitBritain Domestic sentiment tracker.

# Visitor Admission Trends 2022: Family Group Visitors by Region

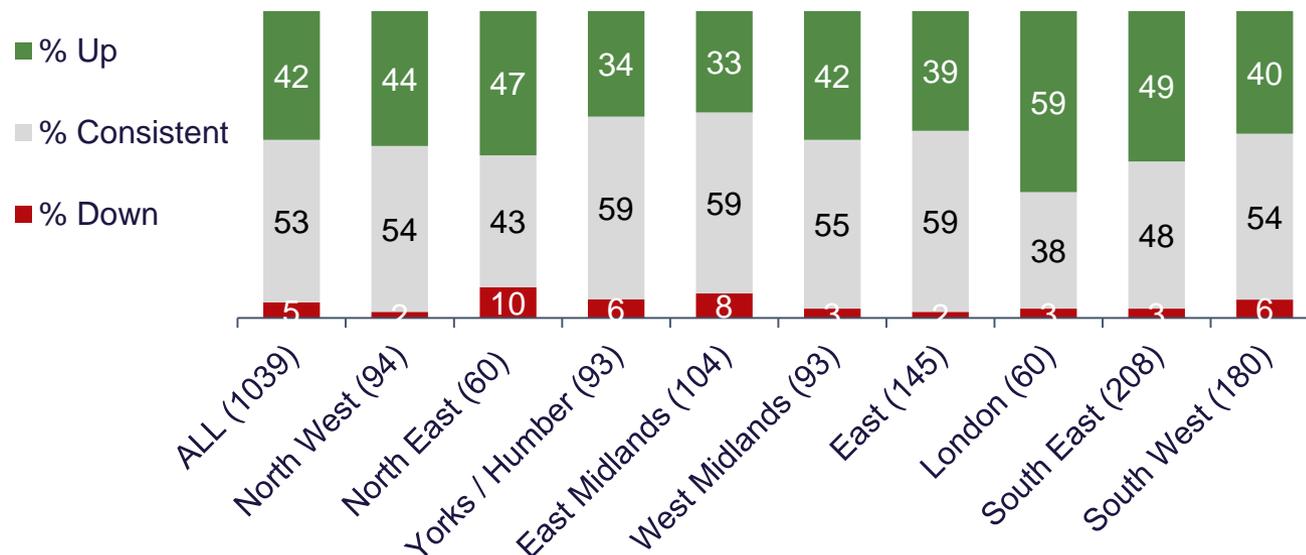
In 2021, the proportion of family visits ranged between 27% to 41% across all regions.

This is similar to proportions seen over the last couple of year.

The family audience expanded across all regions, in particular in London where 59% of sites reported an increase in family visits.

2022, % visiting in a family group (mean share)	36	41	34	37	35	37	36	27	36	35
2021, % visiting in a family group (mean share)	37	38	35 (<50)	38	36	31	42	32	39	34

2021/22 stated change in the volume of family visitors [%]



Base: All answering family group question (1039)

Base: All stating the proportion of visits by families (967)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Visitor Admission Trends 2022: Family Group Visitors by Attraction Category

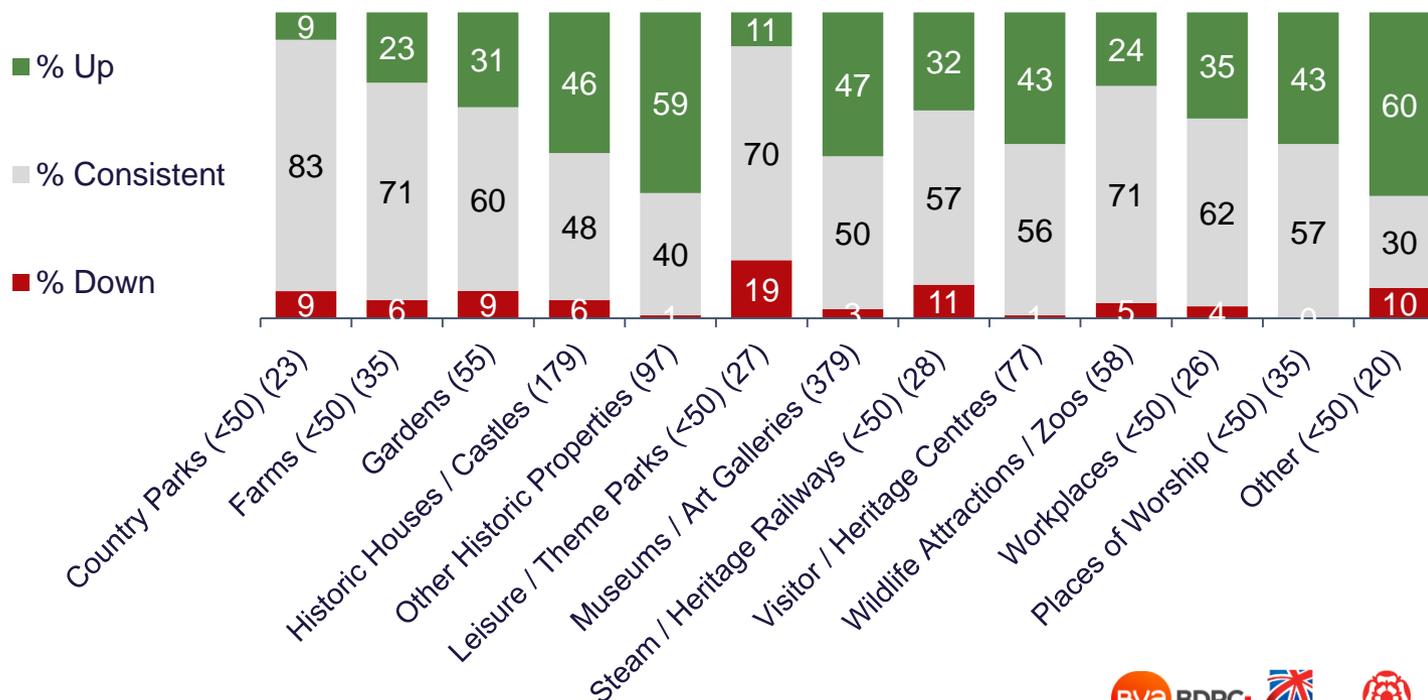
Attractions naturally fall into three tiers of family engagement:

- **High:** Farms (76%) and Leisure/ theme parks (75%)
- **Moderate:** Country Parks (56%), Steam/ Heritage railways (54%) and Wildlife attractions (54%)
- **Low:** All other types, with penetration of family groups falling below 40%

Most attraction categories reported a higher volume of family visits in 2022 vs. 2021. However, this fell back for Leisure/ Theme parks, where more sites (19%) reported a decline in family visits, than saw an increase (11%), which contributed to the slower than average overall rate of recovery seen for this category (6% vs. 42%).

2022, % visiting in a family group (mean share)	56	76	29	32	36	75	31	54	38	49	20	18	32
	(<50)	(<50)	(<50)			(<50)		(<50)		(<50)	(<50)	(<50)	(<50)
2021, % visiting in a family group (mean share)	62	81	29	29	32	82	34	58	34	54	17	15	37
	(<50)	(<50)	(<50)			(<50)		(<50)	(<50)	(<50)	(<50)	(<50)	(<50)

2020/21 stated change in the volume of family visitors [%]



Base: All answering family group question (1039)

Base: All stating the proportion of visits by families (967)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)



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## 5. Site closures

# Full Closure in 2022: By Attraction Category

Attraction closure has reduced since the start of the pandemic – down from 10% in 2020, to 4% in 2022 – with the majority of these being temporary closures, unrelated to COVID-19. ‘Other’ attractions (such as model railways, miniature villages) and farms were most likely to report closure.

## 1%

of English attractions reported PERMANENT closure in 2022.

## 3%

of English attractions reported FULL TEMPORARY closure in 2022.

% reporting permanent or full temporary closure	2022	2021	2020
<b>ALL (1519)</b>	4	6	10
<b>Country Park (56)</b>	2	0	0
Farms (41) (<50)	7	4	0
<b>Garden (93)</b>	4	0	4
<b>Historic House/ Castle (322)</b>	4	7	7
<b>Other Historic (125)</b>	6	11	16
Leisure/ Theme Park (30) (<50)	3	0	8
<b>Museums/ Art Galleries (527)</b>	4	6	12
Steam/ Heritage Railway (29) (<50)	0	6	10
<b>Visitor/ Heritage Centre (92)</b>	2	8	19
<b>Wildlife attraction/ Zoos (72)</b>	3	0	5
Workplaces (31) (<50)	6	4	11
<b>Place of Worship (51)</b>	4	6	0
<b>Other (50)</b>	12	0	11

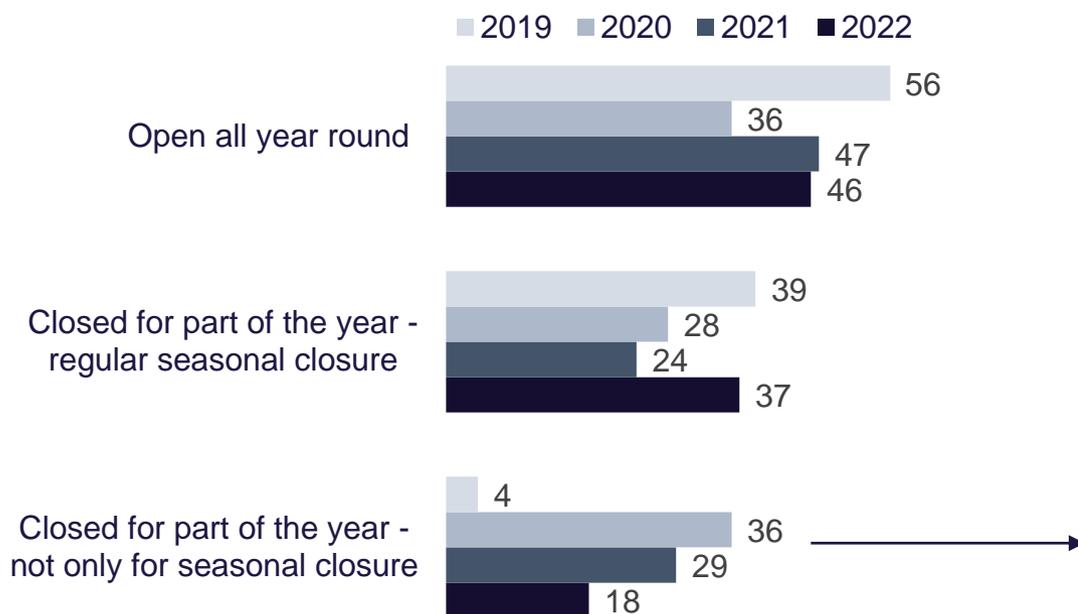
Base: All attractions responding to the survey (1519); All except those permanently closed (1515) (<50) Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Partial Closure in 2022

COVID related closure reduced in 2022, with only 2% of sites remaining closed because it was not profitable for them to open (compared with 7% in 2021) and 4% due to insufficient staff volunteers (compared with 7% in 2021). Most 2022 temporary closures were for planned refurbishments/ repairs.

## % sites open and reasons for closure



Closure due to...	2022 [%]	2021 [%]	2020 [%]
Planned refurbishment/ repairs	8	9	Not asked
Not profitable to open	2	7	7
Insufficient staff/ volunteers	4	7	6
Other reason	6	5	6

Base: All attractions answering closures question (2022: 1136, 2021: 916, 2020: 865, 2019: 973)

Breakdown of 'other' reasons not asked in 2019. \*Amendment to 2021 data for 'closed for part of the year – regular seasonal culture'; in the 2022 report this had shown multi-coded data, comparing this with previous single answer responses. This has been corrected.

# Partial Closure in 2022: By Attraction Category

Attraction closure because it was not profitable to open was rare in 2022, with the highest proportion (6%) recorded for Farms. Lack of staff/ volunteers was more of a problem for some types of attraction – 13% of visitor/ heritage centres were unable to open for this reason.

**% sites open and reasons for closure, by attraction category**

2022 closure due to... [%]	ALL (1136)	Country Park (<50) (26)	Farms (<50) (35)	Garden (61)	Historic House/ Castle (204)	Other Historic (108)	Leisure/ Theme Park (<50) (27)	Museum s/ Art Galleries (418)	Steam/ Heritage Railway (<50) (29)	Visitor/ Heritage Centre (77)	Wildlife attraction/ Zoos (62)	Work-places (<50) (27)	Place of Worship (<50) (40)	Other (<50) (22)
Open year round (aside from national lockdowns)	46	81	54	46	41	36	37	47	7	36	58	48	70	77
Regular seasonal closure	37	4	26	51	45	44	48	36	86	38	21	33	5	14
Planned refurbishment/ repairs	8	*	3	2	8	11	26	7	3	12	6	7	8	9
Not profitable to open	2	*	6	2	1	3	4	2	3	3	3	*	*	*
Insufficient staff/volunteers	4	*	*	*	1	5	*	6	*	13	5	7	5	*
Other reasons	6	15	11	*	6	6	7	6	*	8	10	7	13	*

# Partial Closure in 2022: By Area Type, Admission Charge and Attraction Size

Smaller, free sites were more likely to struggle to attract the volunteers needed to remain open, but the difference from the broader attractions sector was less marked than it had been in 2021: whereas 13% of sites with 10,000 visitors or less were unable to fully reopen due to insufficient staff in 2021, this reduced to 7% in 2022.

**% sites open and reasons for closure, by area type, by admission charge and by attraction size**

2022 closure due to... [%]	ALL (1136)	Coastal (174)	Rural (548)	Urban (414)	Free (416)	Paid (720)	10,000 or less (430)	10,001 - 20,000 (151)	20K-100K (313)	Over 100K (206)
Open year round (aside from national lockdowns)	46	42	39	57	52	42	26	46	60	71
Regular seasonal closure	37	40	46	24	27	43	55	37	28	15
Planned refurbishment/ repairs	8	9	5	11	10	7	7	9	8	5
Not profitable to open	2	2	2	2	1	2	2	3	1	1
Insufficient staff/volunteers	4	6	3	5	6	3	7	6	3	*
Other reasons	6	6	7	6	7	6	7	4	4	8

Base: All attractions answering closures question (1136)



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## **6. Impact of inflation and rising costs**

# Impact of rising energy costs

64% of attractions have been affected by rising energy costs, this rising to 74% amongst charging sites, and 78% amongst sites with admissions above 100k per annum.

The majority of sites have absorbed these costs, but 18% have offset this by increasing costs to visitors – an approach that is more common amongst charging sites and those with over 20k admissions per annum. It is fairly uncommon for sites to have reduced the services they offer, with only 5% doing so.

## Impact of rising energy costs, by attraction charging and attraction size

%	Overall (973)	Free (396)	Charge (577)	20K or less (520)	20K-100K (252)	Over 100K (178)
<b>Had to increase costs to visitors</b>	18	5	27	12	24	26
<b>Reduced income for site</b>	40	39	41	40	39	44
<b>Had to remove/ reduce certain services</b>	5	5	6	4	6	7
<b>No impact/ not relevant to site</b>	36	52	26	43	31	22
<b>% of affected sites increasing costs to visitors</b>	29	10	36	21	35	34

Base: All answering impact of rising energy costs (973)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Impact of rising wages

Half (51%) of attractions have been affected by rising wages – a challenge that again has been more common amongst sites with a visit volume of over 20k a year.

## Impact of rising wages, by attraction charging and attraction size

%	Overall (973)	Free (396)	Charge (577)	20K or less (520)	20K-100K (252)	Over 100K (178)
<b>Had to increase costs to visitors</b>	19	5	29	10	30	30
<b>Reduced income for site</b>	28	25	30	21	35	40
<b>Had to remove/ reduce certain services</b>	4	3	4	3	4	4
<b>No impact/ not relevant to site</b>	49	67	37	66	30	26
<b>% of affected sites increasing costs to visitors</b>	37	15	46	29	43	41

Base: All answering impact of rising costs (956)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Impact of rising supplier costs

69% of attractions were affected by rising supplier costs and these are the most likely costs to have been passed onto visitors (e.g. through increased catering prices)

This has been a particular problem for large sites, with 88% of those attracting more than 100k visits a year affected by the increase in supplier prices.

## Impact of rising supplier costs, by attraction charging and attraction size

%	Overall (956)	Free (385)	Charge (571)	20K or less (506)	20K-100K (250)	Over 100K (178)
<b>Had to increase costs to visitors</b>	28	14	38	21	36	38
<b>Reduced income for site</b>	34	34	34	33	35	40
<b>Had to remove/ reduce certain services</b>	7	4	8	5	8	10
<b>No impact/ not relevant to site</b>	31	48	20	42	20	12
<b>% of affected sites increasing costs to visitors</b>	41	27	48	36	46	43

Base: All answering impact of rising costs (956)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.



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## 7. Admission charge & revenue trends

# Adult Admission Charges 2022

The average adult (high season) admission price remained at £10, having broken this threshold for the first time in 2021.

However, the majority (66%) of charging attractions had an admission fee of less than £10 in 2022.



## 66%

of English attractions charged for entry in 2022.

**Adult admission charge during high season for the main attraction [%]**



# Adult Admission Charge Trends 2022: By Attraction Category

Adult peak season entrance prices rose by an average of 6% in 2022. While this is lower than market inflation in 2022 of 9.2%, based on the Consumer Price Index, most prices will have been set at the end of 2021, or in early 2022, when inflation was 6%.

Adult entrance increased across all attraction types, typically between 4-6%. Where the change varies from this, sample sizes are relatively small and should be treated with caution.

83% of charging attractions, charged for child entry.

In 2022 the average child entry price was £6.57, which was also a 6% increase on 2021.

## Change in adult admission charge: by attraction category

	Average 2022 charge	2021/22 change [%]	2020/21 change [%]
<b>ALL PAID ATTRACTIONS (647)</b>	£10.03	+6	+11
Country Parks (15) <sup>&lt;50</sup>	£7.43	+2	(<10)
Farms (21) <sup>&lt;50</sup>	£15.54	+5	(<10)
<b>Gardens (52)</b>	£8.71	+6	+19
<b>Historic Houses/Castles (171)</b>	£10.53	+4	+14
<b>Other Historic Properties (70)</b>	£9.76	+6	+9
Leisure/Theme Parks (14) <sup>&lt;50</sup>	£13.01	+5	(<10)
<b>Museum/Art Galleries (165)</b>	£7.40	+5	+8
Steam/Heritage Railways (24) <sup>&lt;50</sup>	£10.30	+4	*
Visitor/Heritage Centres (30) <sup>&lt;50</sup>	£8.90	+8	+12
Wildlife Attractions/Zoos (50)	£11.98	+6	+1
Workplaces (17) <sup>&lt;50</sup>	£10.95	+14	(<10)
Places of Worship <sup>&lt;10</sup>	(<10)	(<10)	(<10)
Other (13) <sup>&lt;50</sup>	£16.08	+5	(<10)

<sup><50</sup> Base size below 50 (please treat with caution)

<sup><10</sup> Base size less than 10 (figure therefore omitted)

\* %change is under 1%, therefore not shown

# Adult Admission Charge Trends 2022: By Region

Entrance prices rose between 4% and 6% for most regions, and was lower than market inflation levels (based on the Consumer Price Index) of 9.2%.

Average entrance fees in 2022 were lowest in the North, and highest in London.

## Change in adult admission charge: by region

	Average 2022 charge	2021/22 change [%]	2020/21 change [%]
<b>North West (62)</b>	£8.95	+5	+8 (<50)
North East (35) <sup>&lt;50</sup>	£8.60	+5	+2 (<50)
<b>Yorks / Humber (60)</b>	£9.28	+4	+7 (<50)
<b>East Midlands (60)</b>	£9.50	+6	+7 (<50)
<b>West Midlands (60)</b>	£10.52	+4	+13 (<50)
<b>East (86)</b>	£9.82	+6	+10
London (32) <sup>&lt;50</sup>	£13.23 (<50)	+3 (<50)	+10 (<50)
<b>South East (125)</b>	£10.46	+7	+15
<b>South West (127)</b>	£10.25	+6	+15

Base: All answering admission charge question in 2022 (751)

Base: All answering admission charge question in 2021 and 2022 (647)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<sup><50</sup> Base size below 50 (please treat with caution)

# Adult Admission Charge Trends 2022: By Attraction Size and Area Type

Consistent with previous years, we see a strong link between the number of visitors to an attraction and the price of admission, with popular sites able to command a higher entrance fee.

However, admission charge inflation was consistent across different sizes of attraction in 2022.

Entrance price increases have been slightly higher for attractions based in rural locations over the last two years. This followed a cost reduction in 2020 of -8% associated with part closure of attractions (e.g. historic houses closed, while the gardens attached remained open).

## Change in adult admission charge: by attraction size

	Average 2022 charge	2021/22 change [%]	2020/21 change [%]
<b>20,000 or less p.a. (349)</b>	£8.17	+6	+1
<b>20,001 – 50,000 p.a. (115)</b>	£9.48	+5	+8
<b>50,001 – 100,000 p.a. (65)</b>	£10.63	+5	+16
<b>Over 100,000 p.a (118)</b>	£14.50	+5	+19

## Change in adult admission charge: by area type

	Average 2022 charge	2021/22 change [%]	2020/21 change [%]
<b>Coastal (107)</b>	£9.07	+4	+9
<b>Rural (367)</b>	£10.68	+7	+12
<b>Urban (173)</b>	£9.30	+4	+8

Base: All answering admission charge question in 2022 (751)

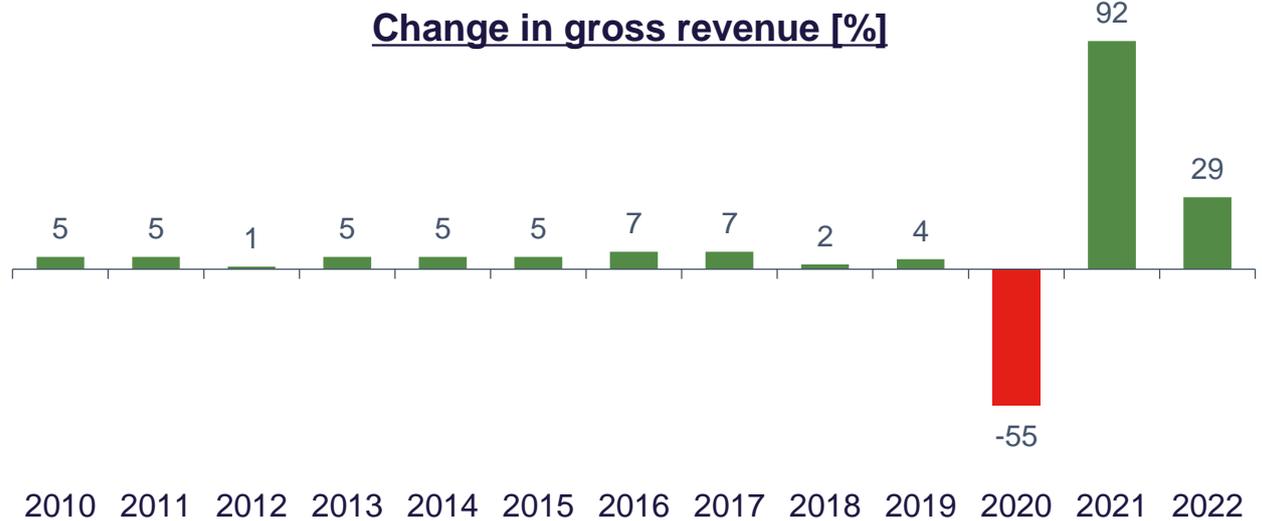
Base: All answering admission charge question in 2021 and 2022 (647)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions increased by 29% in 2022.

This increase is significantly higher than inflation for the year, which stood at 9.2% for the Consumer Price Index, and was fuelled by higher entrance prices (at charging attractions), and an increase in donations and other income streams.



Base: Attractions open during 2021 and 2022 and answering revenue question (883). A small number of extreme outliers reporting revenue growth of 1000%+ were removed as they skewed mean results giving a misleading representation of overall sector performance.

# Gross Revenue Index Trend

In the same way that the volume of visits to attractions is indexed on pages 35-36, we have used an index to show the gross revenue trend.

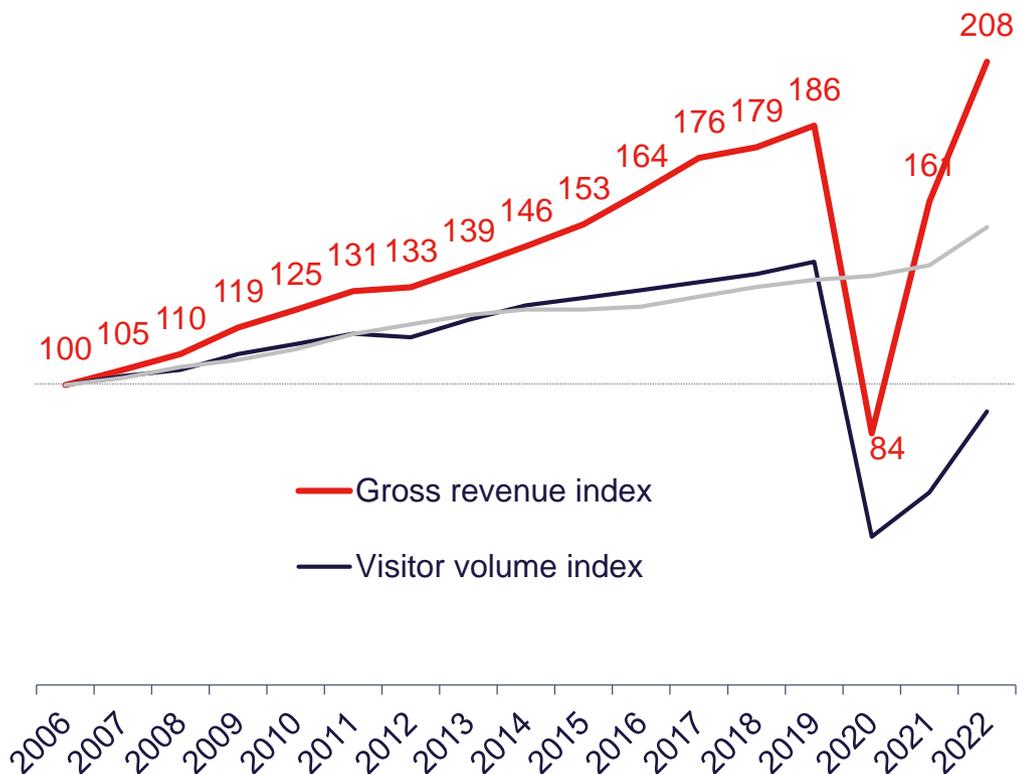
In this chart the **base year for both indexes is 2006, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. gross revenue increased by 5% between 2006 and 2007, increasing the index for 2007 to 105.

The visitor volume index calculation is based on the total visit volume across all attractions responding to the survey, therefore accounting for different attraction sizes. However, we only capture the % change in gross revenue rather than absolute revenue figures. **The gross revenue index therefore trends the average change in revenue across attractions, rather than the absolute change in revenue at a sector level.**

By presenting the data in this way we are able to see that, gross revenue in 2022 on average exceeds 2019 levels, returning to the growth trajectory seen before the pandemic. This is because of the increase in admission fees and other revenue generating business (e.g. development of retail functions etc. during the pandemic).

The increase in staff wages, energy bills, supplier costs etc. during 2022 means that, despite the increase in revenue, the increase in profit margins is likely to be more modest.

**Gross revenue index trend, compared to visitor volume index trend**



Visitor volume base: All attractions providing visits data for current and previous year (1295)

Gross revenue base: All attractions open during 2021 and 2022 and answering revenue question (883). A small number of extreme outliers reporting revenue growth of 1000%+ were removed as they skewed mean results giving a misleading representation of overall sector performance.

# Gross Revenue Trend 2022: By Attraction Category

All attraction categories reported growth in gross revenue, but there was a wide range in the extent of this increase.

At the lower end is Leisure/ Theme Parks and Country Parks, which both reported a marginal increase in gross revenue of 2%, in line with a modest increase in visitor admissions of 6% at Leisure/ Theme Parks and a 2% reduction in visit volume to Country Parks.

At the upper end we saw gross revenue increases of up to 60% for some of the smaller attraction categories. Please note that data is less reliable where the sample sizes are small.

## Average % change in gross revenue

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Country Parks (38) <sup>&lt;50</sup>	+2	+14	-26
Farms (32) <sup>&lt;50</sup>	+20	+52	-38
<b>Gardens (51)</b>	+8	+167	-44
<b>Historic Houses / Castles (166)</b>	+21	+123	-58
<b>Other Historic Properties (77)</b>	+46	+114	-63
Leisure / Theme Parks (24) <sup>&lt;50</sup>	+2	+90	(<10)
<b>Museums / Art Galleries (290)</b>	+39	+67	-55
Steam/Railways (24) <sup>&lt;50</sup>	+21	+103	-63
<b>Visitor / Heritage Centres (66)</b>	+34	+156	-65
Wildlife Attractions / Zoos (49) <sup>&lt;50</sup>	+15	+45	-36
Workplaces (20) <sup>&lt;50</sup>	+60	+45	-60
Places of Worship (28) <sup>&lt;50</sup>	+36	+84	-60
Other (18) <sup>&lt;50</sup>	+59	+50	-69

Base: All attractions open during 2021 and 2022 and answering revenue question (883). A small number of extreme outliers reporting revenue growth of 1000%+ were removed as they skewed mean results giving a misleading representation of overall sector performance. N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<sup><50</sup> Base size below 50 (please treat with caution)  
<sup><10</sup> Base size less than 10 (figure therefore omitted)

# Gross Revenue Trend 2022: By Region

Gross revenue increased across the country.

London recorded the highest level of growth (+72%), driven by the high growth in visitor admissions in this region (+141%).

All other regions saw an average revenue growth of between 22% and 33%.

## Average % change in gross revenue

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>North West (89)</b>	+22	+135	-60
North East (43) <sup>&lt;50</sup>	+27	+65	-56
<b>Yorks / Humber (75)</b>	+23	+76	-35
<b>East Midlands (90)</b>	+25	+74	-59
<b>West Midlands (79)</b>	+26	+77	-58
<b>East (122)</b>	+25	+72	-51
London (43) <sup>&lt;50</sup>	+72	+97	-67
<b>South East (183)</b>	+33	+61	-59
<b>South West (159)</b>	+29	+148	-53

Base: All attractions open during 2021 and 2022 and answering revenue question (883). A small number of extreme outliers reporting revenue growth of 1000%+ were removed as they skewed mean results giving a misleading representation of overall sector performance. N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<sup><50</sup> Base size below 50 (please treat with caution)

# Gross Revenue Trend 2022: By Admission Charge & Attraction Size

Charging attractions benefitted from the entrance price increases and reported better gross revenue statistics than free sites (an increase of 105% in 2021, vs. 68% for free attractions).

Large attractions with over 100k visitors a year were initially more cushioned against the impact of the pandemic and saw a smaller decline in revenue in 2020 (-45% vs. the sector average of -55%). However, they also saw smaller gains in 2021. Many of these large attractions will have already had additional revenue streams in place beyond visitor admissions, or the resource to develop these quickly in 2020 (for example an online shop or fundraising initiatives); this will have insulated them from the initial impact, but perhaps left less scope to make further significant commercial enhancements in 2021.

## Average % change in gross revenue: by admission charge

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Free (298)	+24	+68	-54
Paid (585)	+32	+105	-55

## Average % change in gross revenue: by attractions size

	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Up to 20k p.a. (446)	+35	+100	-60
20k – 50k p.a. (164)	+29	+118	-56
50k – 100k p.a. (83)	+22	+93	-54
Over 100k p.a. (173)	+22	+56	-45

Base: All attractions open during 2021 and 2022 and answering revenue question (883). A small number of extreme outliers reporting revenue growth of 1000%+ were removed as they skewed mean results giving a misleading representation of overall sector performance. N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)

# Donation Revenue Trend 2022 vs. 2021

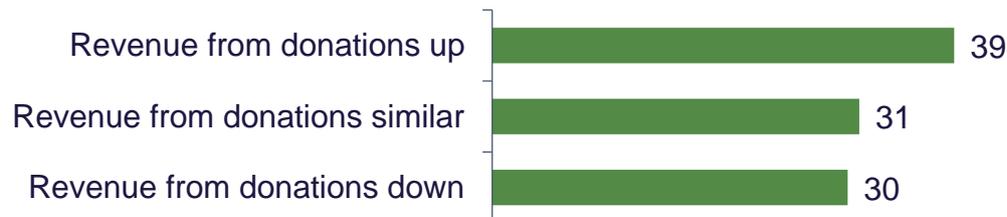
In total, 80% of attractions accepted donations in 2022.

Results are quite polarised when we look at the donation revenue trend: 39% reported an increase and 30% saw a decrease in 2022 donations compared with 2021.

In 2021 free sites saw a drop in donations revenue, but this picked up again in 2022, with a net increase (% reporting an increase minus % reporting a decrease) of 43%.

The same pattern is seen at small sites (with up to 10,000 visitors) which have seen donations rebound after a decline in 2021, with a net increase in 2022 of 24%.

## % change in revenue from donations in 2022 compared with 2021



## % change in donation revenue amongst sites accepting donations: by admission charge

[%]	Revenue down	Revenue similar	Revenue up	NET change ('up' minus 'down')
<b>Free (273)</b>	17	22	61	+44
<b>Paid (529)</b>	37	37	25	-12

## % change in donation revenue amongst sites accepting donations: by attraction size

[%]	Revenue down	Revenue similar	Revenue up	NET change ('up' minus 'down')
<b>10k or less p.a. (240)</b>	24	28	48	+24
<b>10k - 50k p.a. (208)</b>	32	37	31	-1
<b>50k - 100k p.a. (61)</b>	31	26	43	+11
<b>Over 100k p.a. (119)</b>	36	28	36	0

Base: All answering revenue from donations question (802)

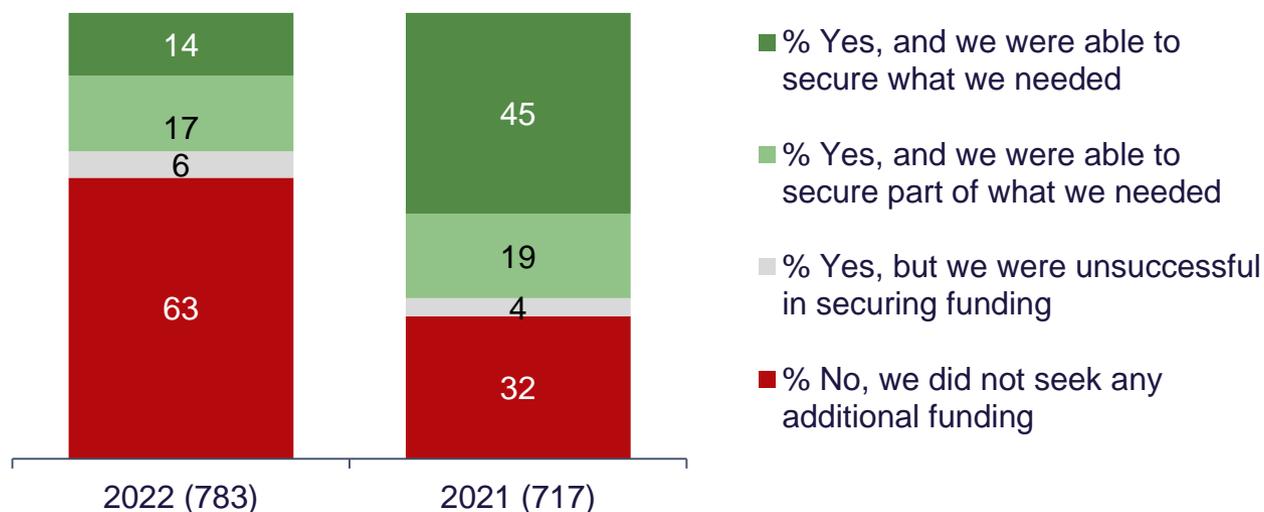
Base: All accepting donations (643)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Additional Funding Sought 2022

Reliance on funding reduced substantially in 2022, with only 37% of attractions seeking additional funding, compared with 68% in 2021. However, the success rate in securing what they needed reduced substantially.

**Sought additional funding during 2022 [%]**



% of those seeking funding who were able to secure all of what they needed	2022	2021
	38%	66%

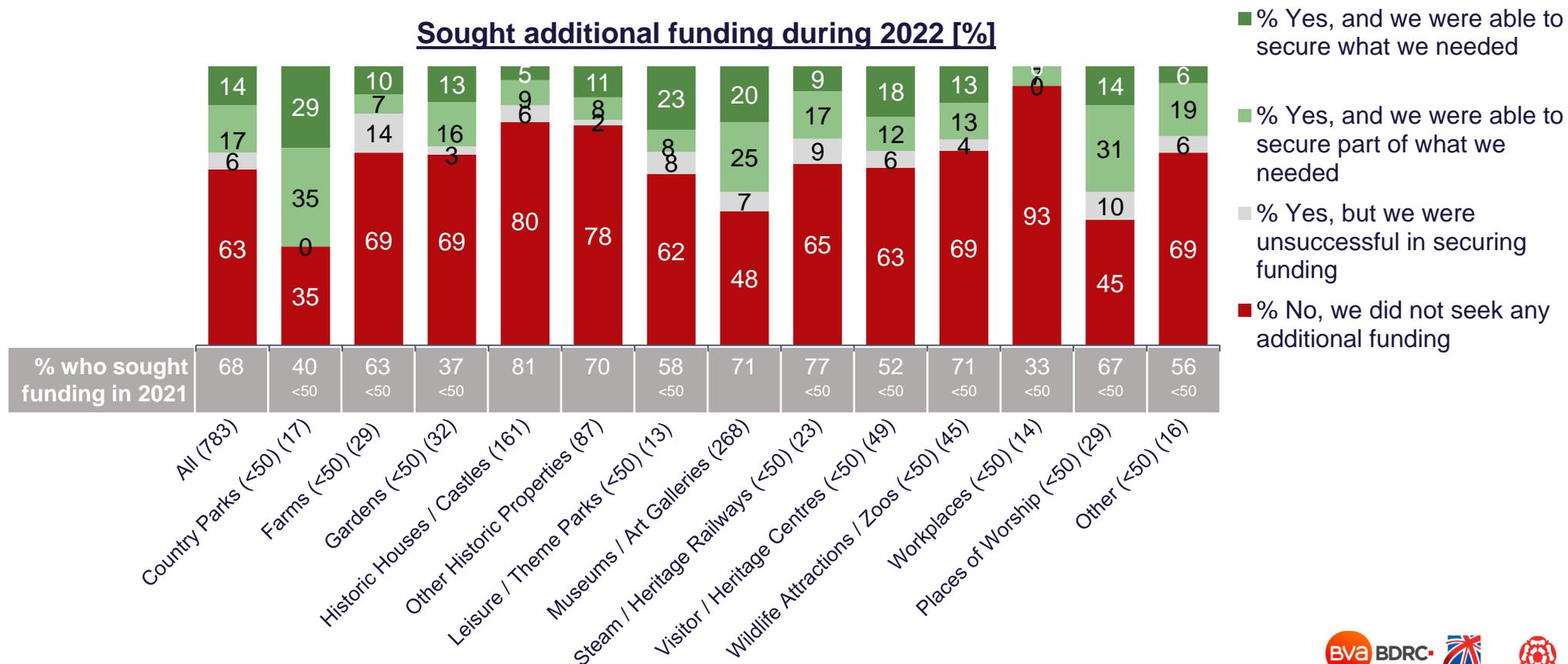
Base: All answering seeking additional funding in 2022 (783)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)

# Additional Funding Sought 2022: By attraction category

The proportion of attractions seeking funding reduced for all categories except for Country Parks, which saw a decline in visitor admissions in 2022.

**Sought additional funding during 2022 [%]**



Base: All answering seeking additional funding in 2022 (783)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)



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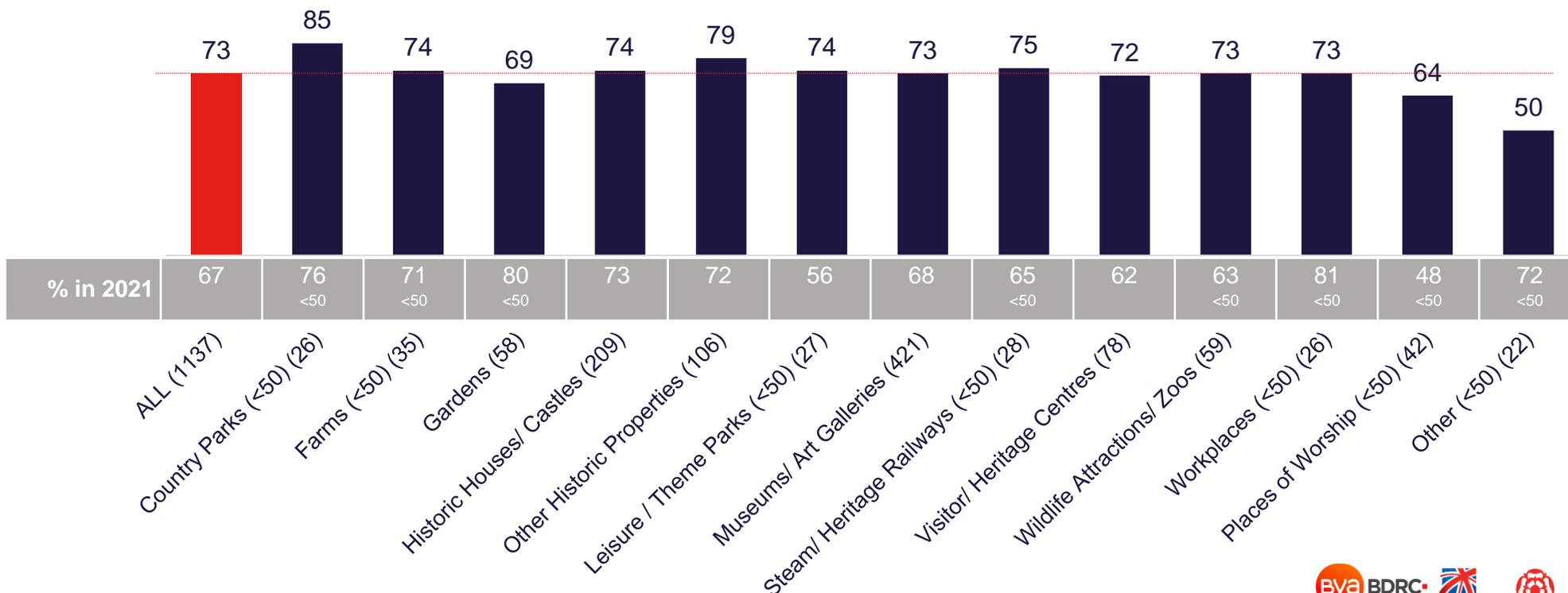
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## 8. Employment trends

# Returning to Pre-pandemic Staffing Levels: By Attraction Category

In the first half of 2023 when this research was undertaken, nearly three quarters (73%) of English attractions were back to 2019 staffing levels – a slight improvement on the 67% reported in 2021. The proportion back up to full staffing is fairly similar across attractions, with a couple of notable departures. Having remained relatively buoyant during the pandemic, Country Parks staffing is closer to pre-pandemic levels than average, with 85% of sites back to 2019 staffing numbers. ‘Other’ attractions (e.g. model villages) were the worst hit during the pandemic and have seen the slowest recovery, so it is unsurprising that staffing remains significantly below pre-pandemic levels with only 50% of site back up to full staffing.

**% of attractions that are back to pre-pandemic staffing levels: by attraction category**



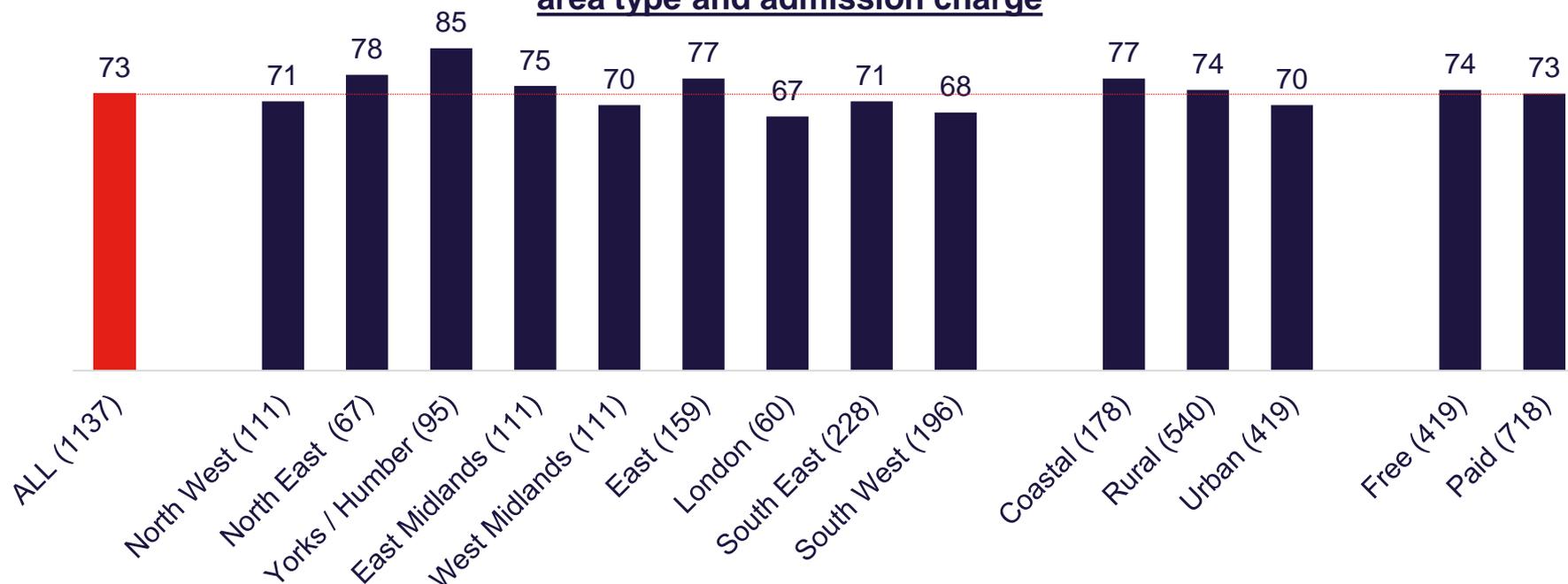
Base: All answering back to pre-pandemic staffing levels (1137)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

# Returning to Pre-pandemic Staffing Levels: By Region, Area Type and Admission Charge

In terms of staffing levels compared with before the pandemic, there is a lot of consistency between different areas, and charging types. Only Yorkshire & The Humber stands out, with sites in the region more likely to have returned to pre-pandemic staffing levels than average (85% having done so).

**% of attractions which are back to pre-pandemic staffing levels: by region, area type and admission charge**



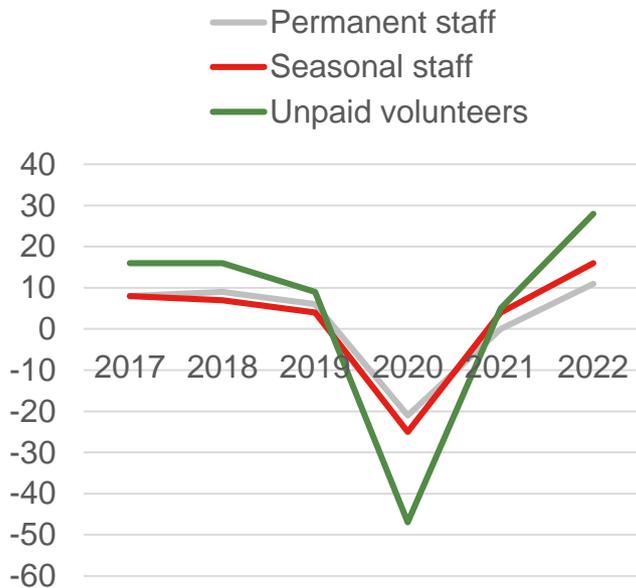
Base: All answering back to pre-pandemic staffing levels (11378)  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Overall Employment Trends

The picture in 2022 was very much one of growth for attraction staffing. There was a net (% increase minus % decrease) increase in all types of staff, in particular in unpaid volunteers.

Looking ahead to 2023, a more modest expansion in staff teams is expected, with the largest growth predicted to again come from unpaid volunteers.

## NET change (% increase minus % decrease) in staffing

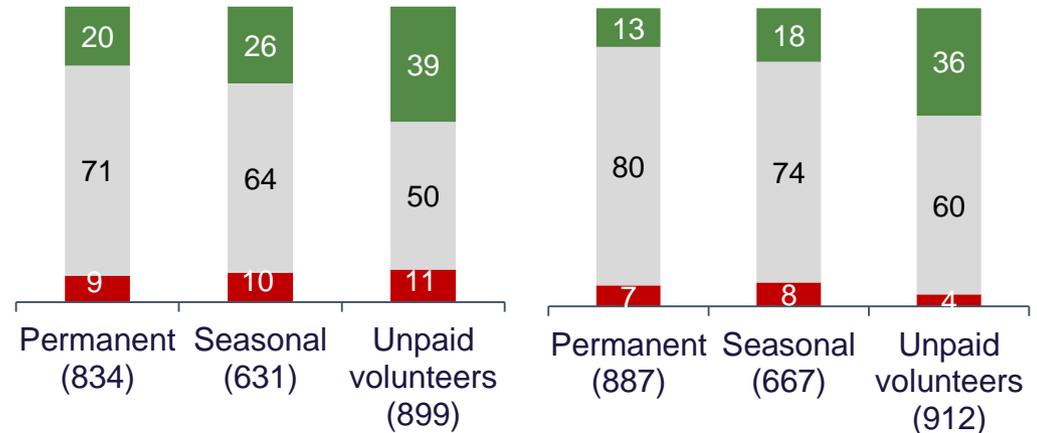


NET ('up' minus 'down')	+11%	+16%	+28%	+6%	+10%	+32%
-------------------------	------	------	------	-----	------	------

## 2021/22 Stated change in employees

## Anticipated change in employees in 2022

- % of sites stating 'Up'
- % of sites stating 'Consistent'
- % of sites stating 'Down'



Base: All answering employment questions

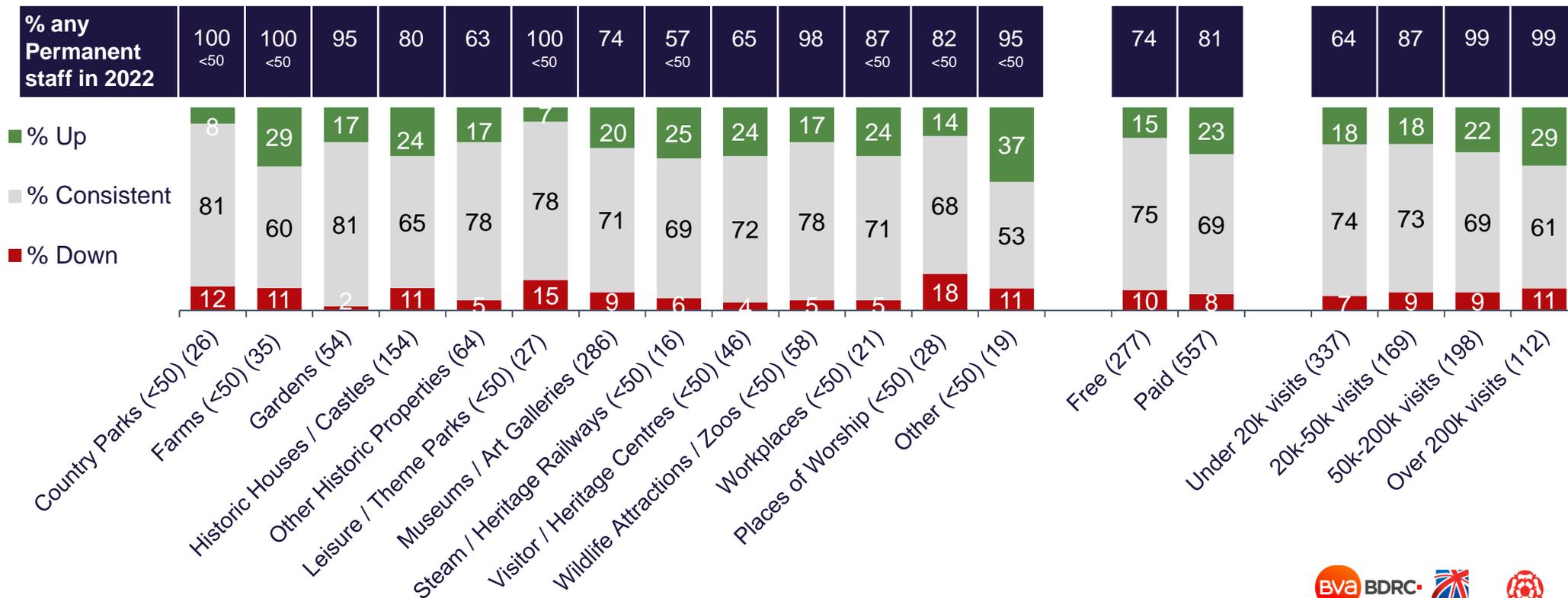
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Permanent Employees: 2021 – 2022 trends

There was a net (% increasing minus % decreasing) increase in permanent staffing levels across most attraction categories. The exceptions to this were Leisure/ Theme parks, Country Parks and Places of Worship, which saw a net decline of 8%, 4% and 4% respectively.

Larger attractions, with over 200k visits per annum, were the most likely to report an increase in permanent employees, with 18% more of these large attractions increasing than reducing staff numbers.

## 2021/22 Stated change in permanent employees



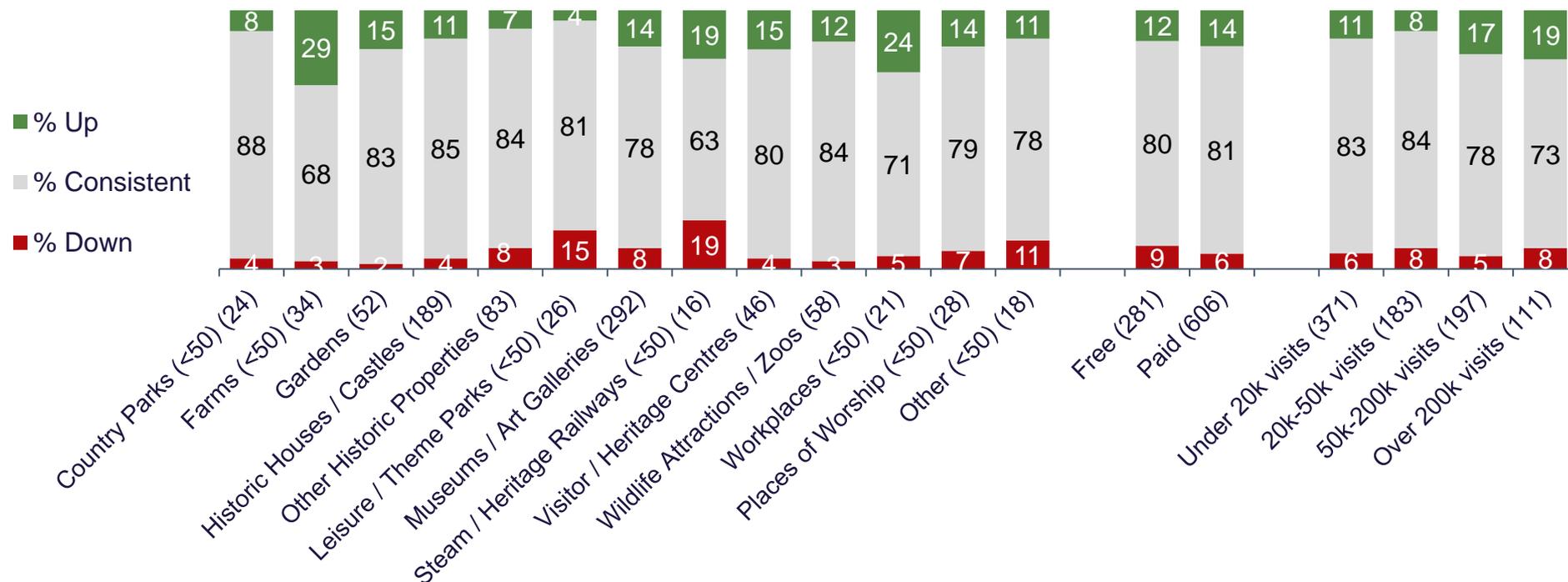
Base: Table: All answering employment questions Chart: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)

# Permanent Employees: 2023 Predictions

When looking ahead to 2023, the expectation is that more permanent staff will be employed across most attraction categories. This is particularly true for Farms and Workplaces. However, there are two attraction categories where the number of permanent jobs may be at risk – these being Leisure/ Theme Parks (where 15% of site anticipate cut-backs compared with 4% recruiting) and Other Historic Properties (where 1% more sites are expecting staff number to reduce than are anticipating an increase).

**Anticipated change in permanent employees in 2023**



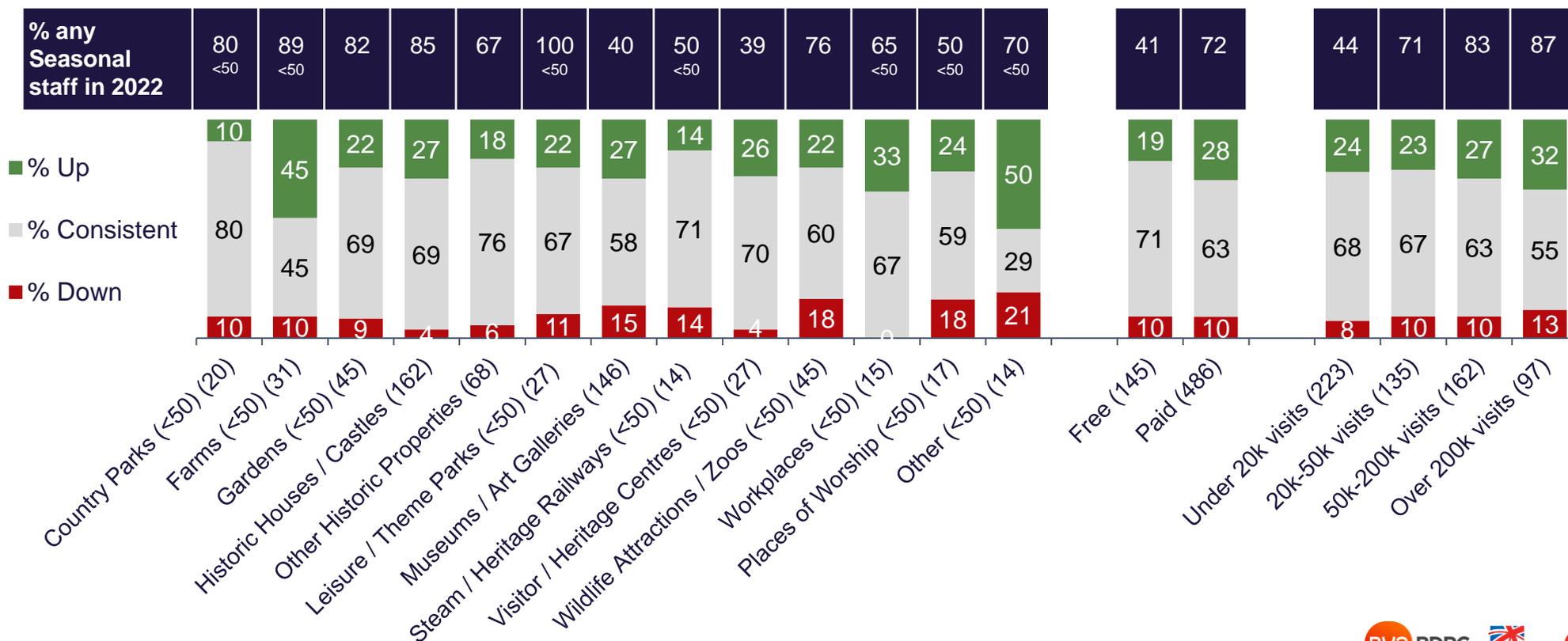
Base: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

# Seasonal Employees: 2021 – 2022 trends

All attraction categories either increased seasonal staffing or maintained existing levels in 2022. Farms and 'Other Attractions' (e.g. model villages) were the most likely to increase seasonal staffing. This is also more common amongst paid attractions and those with over 200k admissions a year.

**2021/22 Stated change in seasonal employees**



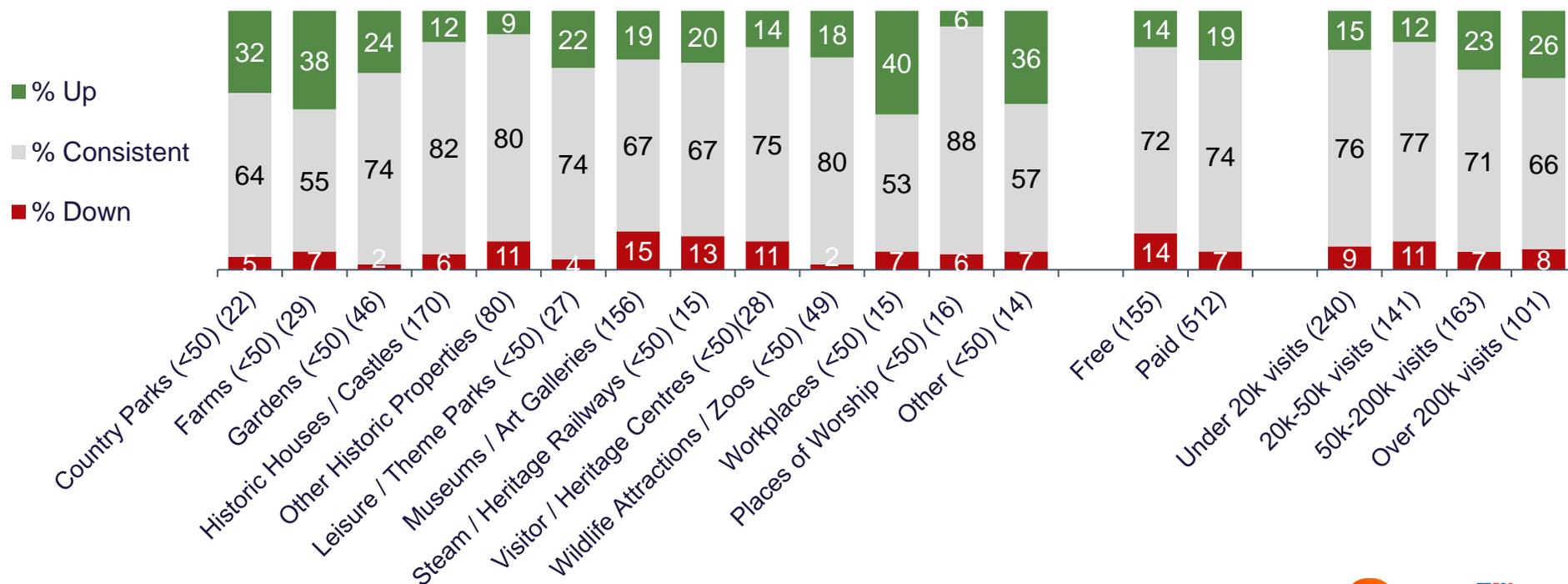
Base: Table: All answering employment questions Chart: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)

# Seasonal Employees: 2023 Predictions

Attractions anticipate further increases in seasonal staffing in 2023, with Other Historic properties being the only category anticipating a net decline (% increase minus % decrease) in seasonal employees in 2023 (of -2%). Workplaces and Farms are the most bullish in their predictions, along with larger attractions. Paid attractions anticipate a net increase in seasonal employees in 2023 whilst there is no change at a net level for free attractions.

## Anticipated change in seasonal employees in 2023



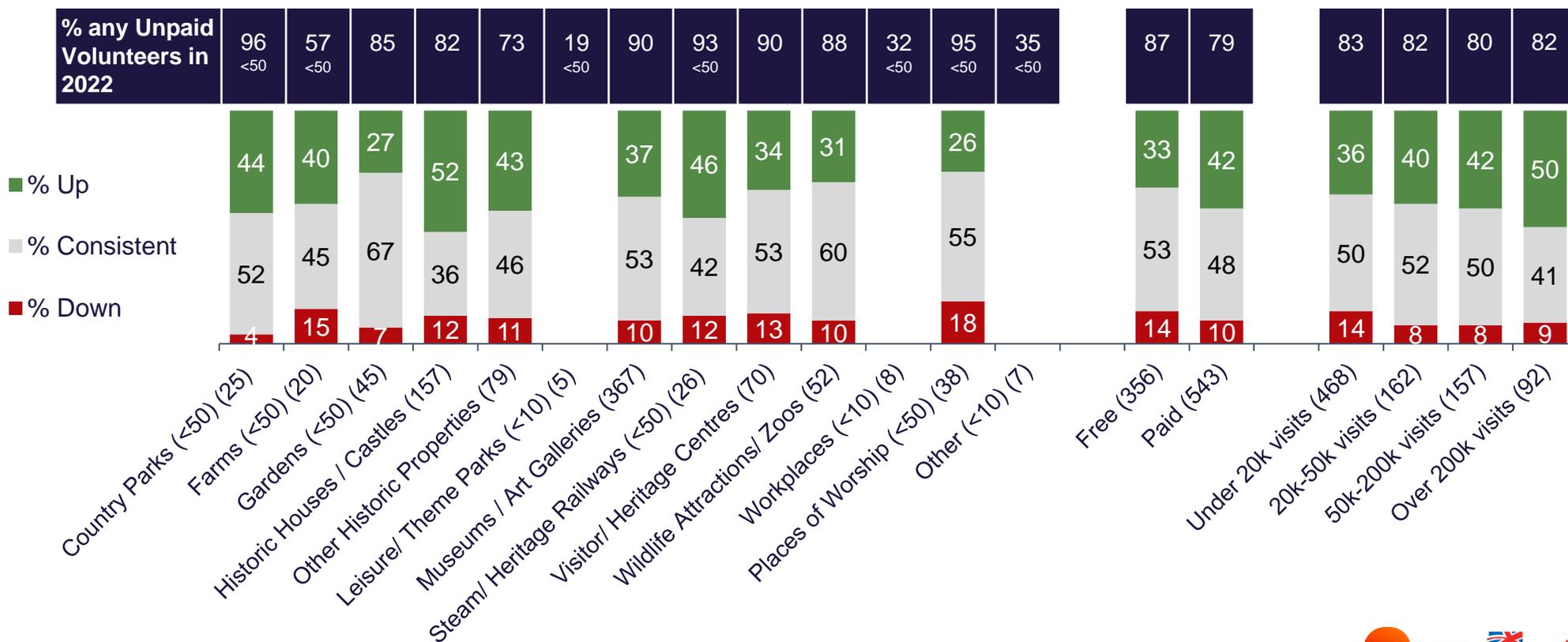
Base: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

# Unpaid Volunteers: 2021 – 2022 trends

Unpaid volunteers are essential to the running of many attraction categories with 83% of all attractions relying on their input. Historic houses/ castles and Steam/ heritage railways are the categories that have been most successful in growing their pool of volunteers.

### 2021/22 Stated change in unpaid volunteers



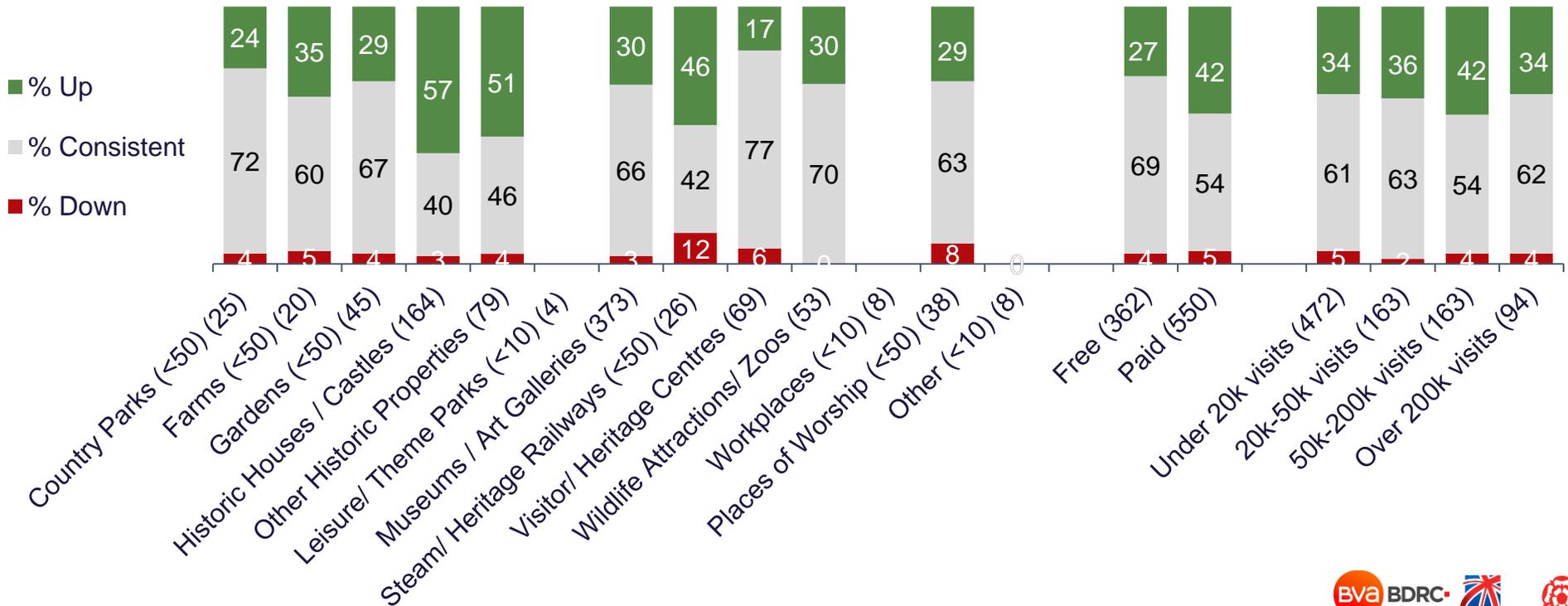
Base: Table: All answering employment questions Chart: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)  
 (<10) Base size below 10 (data not shown)

# Unpaid Volunteers: 2023 Predictions

The number of unpaid volunteers is expected to increase across the board for 2023, particularly at Historic Houses/ Castles and Other Historic Properties (51%).

## Anticipated change in unpaid volunteers in 2023



Base: All with employees of this kind  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)  
 (<10) Base size below 10 (data not shown)



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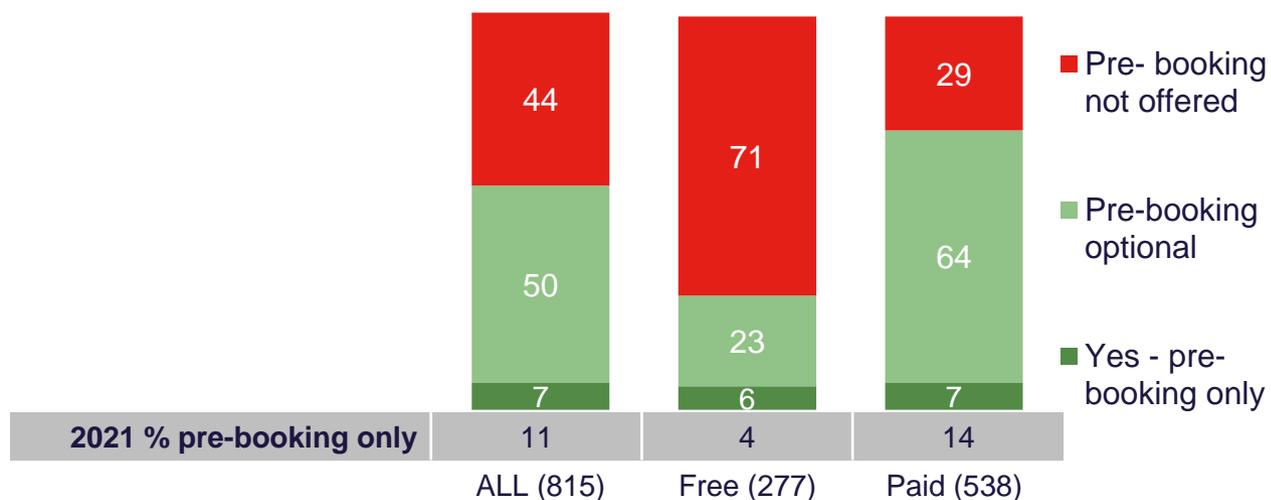
## 9. Marketing & communications trends

# Pre-booking requirement

Only 7% enforced the need to pre-book tickets in 2022, down from 11% in 2021 and 27% in 2020. Instead we saw more sites move towards a policy of encouraging pre-booking.

Pre-booking is far more common at charging attractions, with 71% offering this as an option. But the requirement for pre-booking has fallen away since lockdown, with only 7% insisting on pre-booking in 2022 compared with 14% in 2021 and 40% in 2020.

% of sites requiring visitors to pre-book visits during 2022

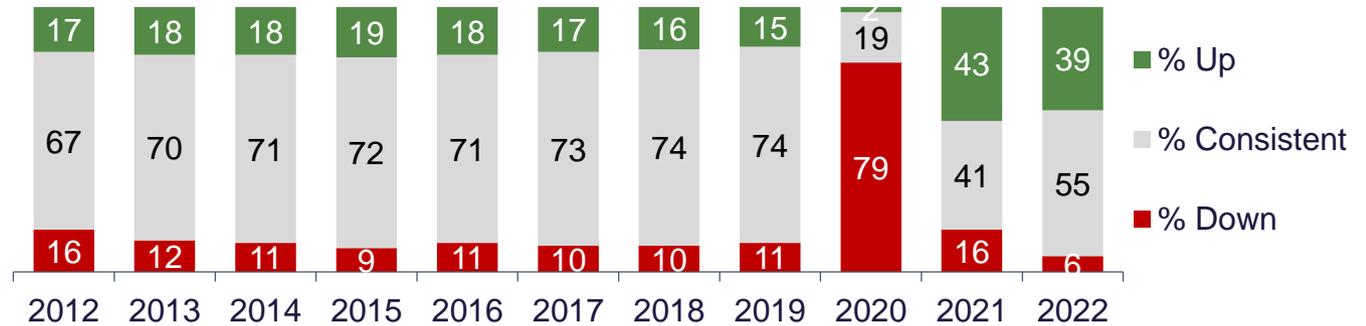


# Marketing Expenditure Trend

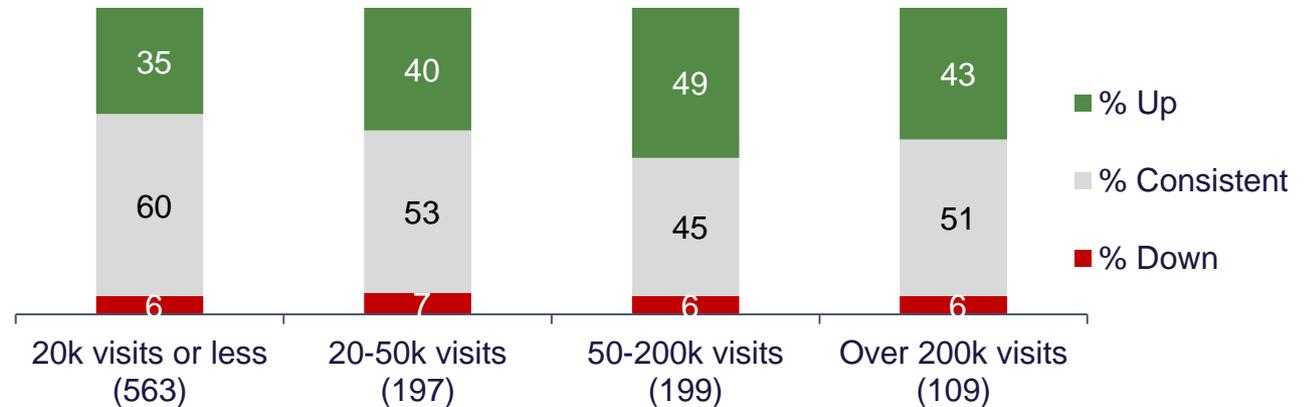
**Marketing expenditure increased again in 2022**, with 39% of attractions reporting an increase in their budgets (compared to their marketing budgets in 2021).

This shift was evident across all attraction sizes but was less marked at smaller sites.

**Trend in marketing expenditure**



**Trend in marketing expenditure by size of attraction**



Base: All answering marketing question (1100)

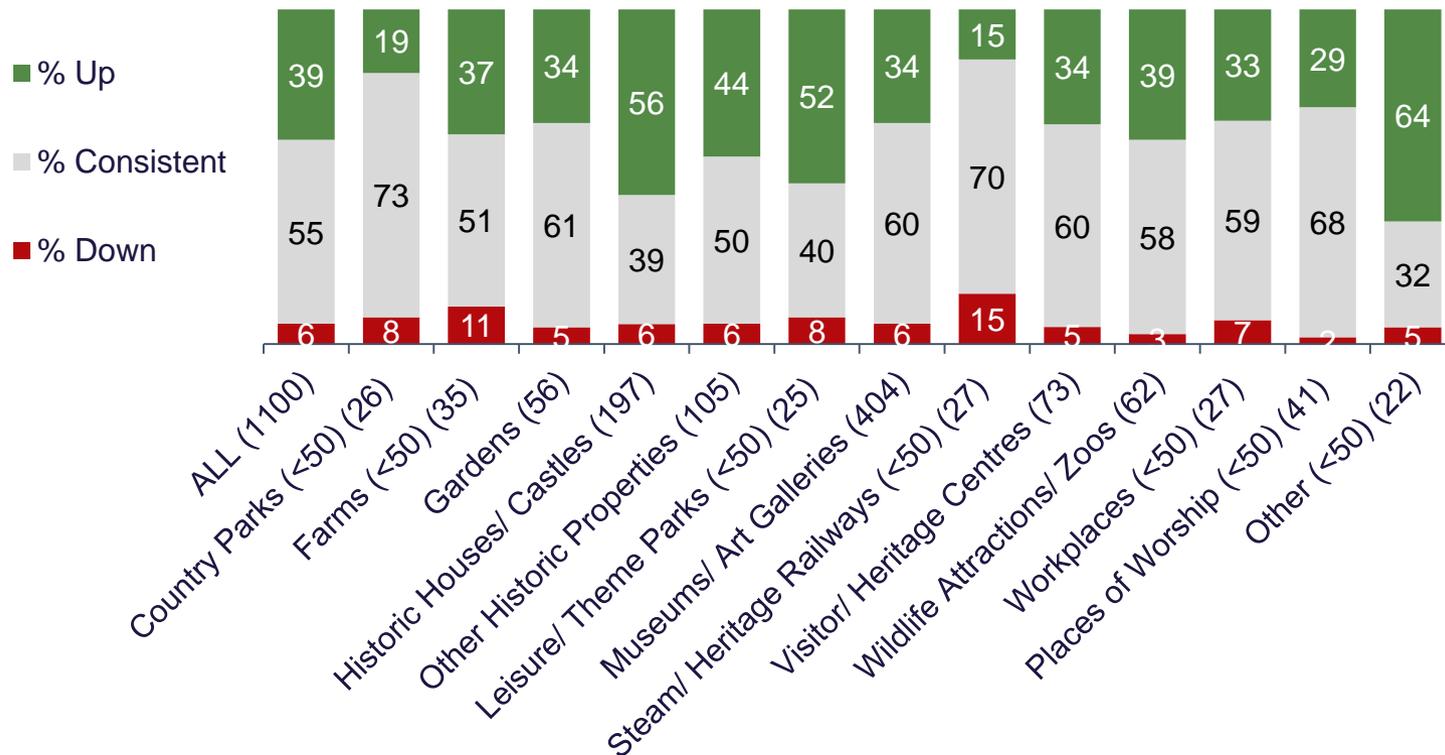
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Marketing Expenditure Trends 2022: By Attraction Category

All attraction categories reported higher marketing budgets in 2022, with the exception of steam/ heritage railways, where the proportion of sites increasing their marketing budget was matched by those who reduced it.

Increased marketing spending was particularly notable at Historic houses/ castles, leisure/ theme parks and 'other' attractions (such as model villages).

**Trend in marketing expenditure by attraction category**



Base: All answering marketing question (1100)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

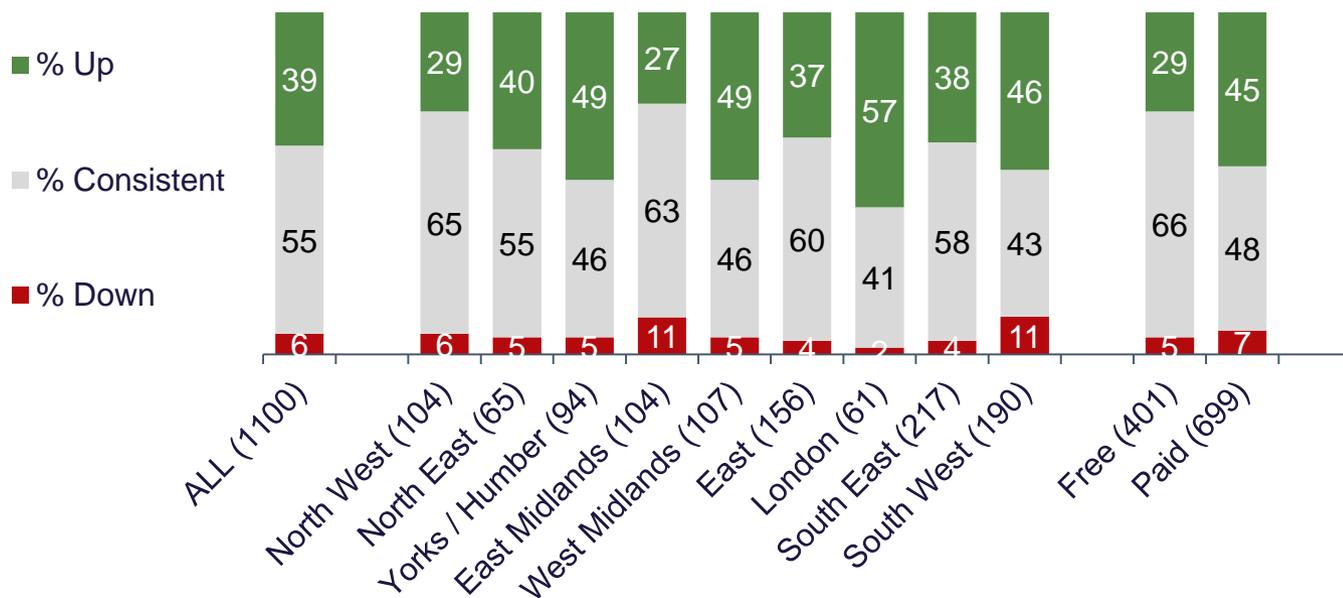
(<50) Base size below 50 (please treat with caution)

# Marketing Expenditure Trends 2022: By Region & Admission Charge

Marketing budgets grew across all regions, but was highest in London, where 57% of sites reported an increase.

Consistent with 2021, paid attractions were more likely to increase budgets than free attractions.

Trend in marketing expenditure by region and admission charge



Base: All answering marketing question (1100)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Digital Communications Offered

Use of social media continues to grow, with 94% of visitor attractions using any social media or apps in 2022, up by 4% in the last 2 years.

Sites typically use 3 forms of social media, with Facebook (90%), Twitter (62%) and Instagram or Pinterest (61%) being the most common. However, adoption of these platforms for marketing communications has plateaued, and use of YouTube has declined from 41% using in 2020, down to 34% using in 2022.

We introduced TikTok as a new answer option in 2022, separating this out from 'Other social media', which has been embraced by just under a quarter of attractions (24%). Separating this out means that mention of the 'other social media' category declined in 2022.

Larger attractions, with more marketing resource, use a greater number of digital communication platforms, and adopt newer forms earlier. Sites with over 100k visits a year are nearly four times as likely to have used TikTok in 2022 than those attracting 10k visits or fewer.

## Digital communication channels trend

	% offered in 2022	% offered in 2021	% offered in 2020
<b>ANY Social/apps</b>	<b>94</b>	<b>92</b>	<b>90</b>
<b>Facebook page</b>	90	89	88
<b>Twitter account</b>	62	61	64
<b>Instagram/ Pinterest</b>	61	62	60
<b>E-newsletter</b>	53	55	51
<b>YouTube</b>	34	39	41
<b>TikTok</b>	24	NA	NA
<b>Other social media</b>	25	31	25
<b>Mobile apps</b>	18	19	18

## Digital Communication channels by attraction size

% offered	10k or less (436)	10k-20k (154)	20k-100k (318)	Over 100k (218)
<b>ANY Social/ apps</b>	<b>89</b>	<b>96</b>	<b>97</b>	<b>100</b>
<b>Facebook page</b>	83	93	95	98
<b>Twitter account</b>	43	67	75	79
<b>Instagram/ Pinterest</b>	43	65	71	80
<b>E-newsletter</b>	39	55	61	69
<b>YouTube</b>	19	34	46	46
<b>TikTok</b>	10	24	32	39
<b>Other social media</b>	17	26	31	32
<b>Mobile apps</b>	7	18	24	30

Base: All answering digital communications question (1159)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Digital Communications Offered in 2022: By Attraction Category

While Facebook is commonly used across the board, other social media varies from one category to another. Historic houses/ castles and Leisure/ Theme Parks employ the broadest spread of digital communications.

## Digital communication channels offered by attractions category

% offered	Country Parks (<50) (27)	Farms (<50) (36)	Gardens (61)	Historic houses / castles (205)	Other historic (108)	Leisure / theme parks (<50) (27)	Museum / art galleries (434)	Steam / heritage railways (<50) (28)	Visitor / heritage centres (79)	Wildlife / zoos (62)	Work-places (<50) (27)	Places of Worship (<50) (42)	Other (<50) (23)
ANY	100	100	95	96	95	100	94	100	84	100	96	88	96
Facebook	100	100	93	88	90	93	89	100	78	98	89	79	87
Twitter account	33	61	66	73	61	70	64	43	42	66	37	60	57
Instagram/ Pinterest	52	89	74	82	56	59	53	50	42	69	59	45	70
E-newsletter	19	69	54	63	57	56	52	50	42	53	56	48	35
YouTube	11	39	20	47	44	59	33	43	16	27	11	33	35
TikTok	*	36	10	46	40	52	18	14	5	26	4	2	35
Other social media	15	8	7	46	43	41	19	18	24	16	7	12	26
Mobile apps	11	6	8	47	33	37	10	*	5	11	*	2	17

Base: All answering digital communications question (1159)

(<50) Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Content Offered

During the COVID-19 pandemic lockdowns a substantial number of attractions developed new content, such as online tours, home-schooling content and adult online learning opportunities in order to support and grow their audiences. By 2022 this had reduced substantially. Instead, there was more of a focus on digitising collections and developing the online retail offer.

## Marketing & content used to engage with their audience or to build revenue

	%	2022 (813)	2021 (931)
Online tours/ video content - for free		25	36
Home-schooling/ family content – for free		10	30
Online learning (schools/adults) – for free		9	26
Online tours/ video content – at a cost		6	6
Home-schooling/ family content – at a cost		3	3
Online learning (schools/adults) – at a cost		5	9
Developed online retail offer		38	32
Digitised collections		36	25
Used augmented reality on site		4	2
None of these		37	34

Base: All attractions answering marketing activities question (813)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Content Offered in 2022: By Admission Charge & Attraction Size

There is a clear difference in focus between paid and free sites, with paid sites more focused on commercial opportunities, in particular developing their retail offer, while free sites are more likely to offer free digital content to their audience.

Over half (52%) of small sites, with fewer than 10k admissions a year, provide online content or retail opportunities. The main difference from larger sites is that they are less likely to have digitised collections or to have developed an online retail offer.

## Content offered, by attraction charging and attraction size

%	Free (281)	Paid (532)	10k or less (293)	10k - 20k (111)	20k - 100k (227)	Over 100k (161)
Online tours/ video content - for free	30	22	23	24	26	30
Home-schooling/ family content – for free	13	9	5	13	15	13
Online learning (schools/adults) – for free	13	7	7	10	10	12
Online tours/ video content – at a cost	5	6	5	5	6	7
Home-schooling/ family content – at a cost	2	4	2	5	5	2
Online learning (schools/adults) – at a cost	5	5	3	6	7	7
Developed online retail offer	25	45	26	43	41	49
Digitised collections	35	36	25	43	41	41
Used augmented reality on site	6	3	2	7	4	6
None of these	41	35	48	35	32	26



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# 10. Sustainability

# Sustainability Strategy: Overall, by Region and by Area Type

The majority of attractions (62%) now have an environmental strategy and/or budget.

This varies by region, with North East and London based attractions more likely to have an environmental strategy or budget in place.

We also see more focus on environmental issues amongst attractions that charge for entry, which are more than twice as likely to have a budget allocated to meeting environmental objectives as free attractions.

**Sustainability strategies in place in 2022 [%]**



**Formal prioritisation of sustainability, by region and area type [%]**

[%]	North West (75)	North East (53)	Yorks / Humber (71)	East Midlands (72)	West Midlands (80)	East (102)	London <sup>50</sup> (42)	South East (149)	South West (129)	Free (266)	Charge (507)
Have an environmental business strategy	49	57	38	44	44	38	52	44	39	47	42
Have a budget to help meet environmental objectives	24	34	39	29	24	23	36	24	33	16	35
Neither	37	17	38	33	40	45	29	43	42	48	33

Base: All answering sustainability question (740)

<sup>50</sup> Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Sustainability Strategy: By Attraction Category

Due to the nature of the sites, it is unsurprising that Wildlife Attractions/ Zoos, Country Parks and Gardens are the most likely categories to have a business focus on the environment.

There are a number of things that attractions can do to be more sustainable, and to encourage visitors to be more sustainable, without much investment, but lack of an assigned budget may be a limiting factor, especially for farms, museums/ galleries and visitor/ heritage centres.

## Formal prioritisation of sustainability, by attraction category [%]

[%]	Country Parks (<50) (16)	Farms (<50) (29)	Gardens (<50) (34)	Historic houses / castles (155)	Other historic (83)	Leisure / theme parks (<50) (13)	Museum / art galleries (266)	Steam / heritage railways (<50) (23)	Visitor / heritage centres (50)	Wildlife / zoos (<50) (44)	Work-places (<50) (15)	Places of Worship (<50) (29)	Other (<50) (16)
Have an environmental business strategy	75	41	65	29	34	23	43	43	40	77	60	66	56
Have a budget to help meet enviro. objectives	38	7	29	59	45	23	12	17	12	39	27	17	25
Neither	13	55	26	21	25	54	53	48	58	18	40	31	38

Base: All answering sustainability question (740)

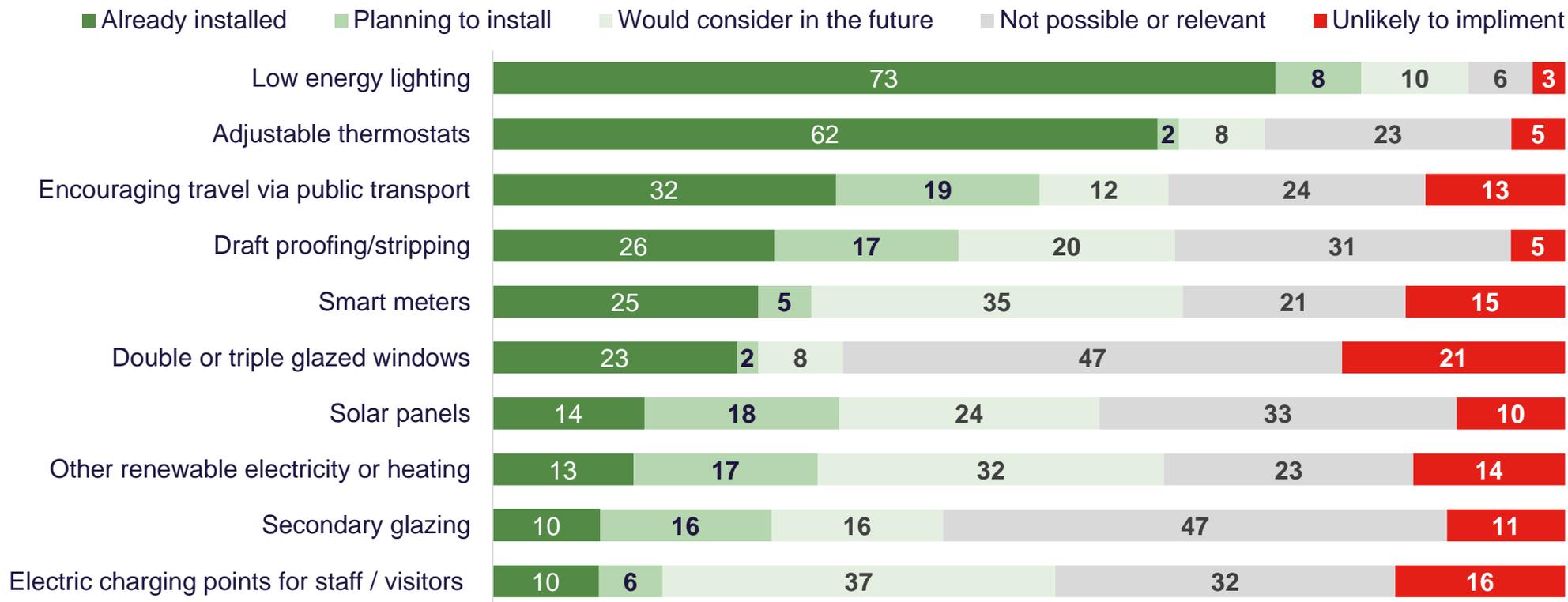
<50 Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

# Sustainability Action

Energy saving initiatives, such as low energy lighting and adjustable thermostats, are popular amongst attractions, and the majority of sites this is relevant to already have or are actively planning to install this. However, there are plenty of areas for potential enhancements to sustainable practice. The most popular for the future are adding electric car charging points, switching to smart meters and using renewable electricity/ heating sources.

## Energy efficiency measures [%]





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# 11. Accessibility Provisions

# Accessibility Provisions 2022

Accessibility is becoming a priority, with over half of attractions investing in provisions during 2022. The most common is in staff training, with nearly 2 in 5 sites (39%) including this within their training schedule; just over a fifth made changes to their built environment/ amenities/services (22%) and a similar proportion improved the accessibility of their communications (21%).



## 54%

of sites invested in one of these enhancements to their accessibility provision in 2022.

### Accessibility provisions provided or planned [%]

[%]	Have done in previous 12 months	Clear plans for the next 12 months	Clear plans for further ahead	Are considering, but no firm plans	No plans to consider this at the current time
Improve the built environment, amenities and services for visitors with accessibility requirements	22	15	22	18	23
Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements	39	13	7	21	20
Improve the information, marketing and digital inclusion for visitors with accessibility requirements	21	15	23	24	17

Base: All answering Accessibility provisions question (779)

<sup>50</sup> Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.



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# 11. Appendix

# Sample & Response (1)

VisitEngland periodically reviews the attractions listing to refine this in light of the Visitor Attractions Definition. Two changes of note have been made in previous years:

- In 2018 organisations that are primarily a retail outlet, but which have an attraction element (unless separate figures could be provided for the attraction element alone) were removed from the attractions list.
- In 2013 parish churches and small art galleries with a retail focus were removed.

Whilst country parks continue to be included in the survey findings, they are 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 is updated using Destination Management Organisation updates on attractions in their areas, using Birkbeck University's Museums Mapping database and based on sector news of attraction openings/ closures.

VisitEngland holds a database of 5942 visitor attractions in England, of which 505 have told us that they are unable to take part (e.g. because they are unmanned sites with no means of answering the survey questions, or it is company policy not to share data).

5,437 English visitor attractions were invited to take part in this year's survey.

1,519 (28% of) English visitor attractions responded to the survey in 2023, of which 61 sites had either permanently or temporarily closed. Responses were provided as follows:

839 completed online

269 completed by post

411 provided data through umbrella organisations

1,432 sites were open and provided 2022 visitor numbers.

**1295 sites were open and provided visitor numbers in both 2021 and 2022 and these attractions form the basis of this report's visitor trend evaluation.**

# Sample & Response (2)

Survey responses in 2020 and 2021 were disrupted by the COVID-19 pandemic, due to site closures and staffing changes during this period – particularly at smaller visitor attractions. This caused a shift in the attraction size profile of responding sites.

However, the 2022 visitor volume profile is now close to pre-pandemic levels.

## Response by attraction size

Category	No. of attractions giving 2022 & 2021 data	2022 profile of attractions providing data*	2021 profile of attractions providing data*	2019 profile of attractions providing data*
<b>10,000 or less</b>	415	32%	21%	29%
<b>10,001 – 20,000</b>	162	13%	13%	12%
<b>20,001 – 50,000</b>	232	18%	20%	19%
<b>50,001 – 100,000</b>	146	11%	12%	11%
<b>100,001 – 200,000</b>	140	11%	13%	11%
<b>Over 200,000</b>	200	15%	22%	18%
<b>Base size</b>	<b>1295</b>	<b>1295</b>	<b>979</b>	<b>1152</b>

\* Based on sites providing data for the year before as well (e.g. when providing 2022 data, they also provided 2021 data).

# Sample & Response (3)

Sample profile for attraction category remains in line with what we have seen in previous years.

## Response by attraction category

Category	No. attractions open and providing data for 2022 & 2021	2022 profile of attractions providing data*	2021 profile of attractions providing data*
Country Parks	52	4%	3%
Farms	30	2%	2%
Gardens	83	6%	7%
Historic Properties	409	32%	35%
Leisure / Theme Parks	18	1%	2%
Museums / Art Galleries	449	35%	32%
Steam / Heritage Railways	26	2%	2%
Visitor / Heritage Centres	77	6%	5%
Wildlife Attractions / Zoos	66	5%	5%
Workplaces	25	2%	2%
Places of Worship	40	3%	3%
Other	20	2%	2%
<b>Base size</b>	<b>1295</b>	<b>1295</b>	<b>979</b>

See Appendix for examples of attractions falling into each category.

\* Based on sites providing data for the year before as well (e.g. when providing 2022 data, they also provided 2021 data).

Note: we are not showing 2019 above as the attraction category profile is in line with both 2020 and 2019.

# Sample & Response (4)

Sample profile for region, area type and admission type remains consistent with previous years.

## Response by region

Category	No. of attractions giving 2022 & 2021 data	2022 profile of attractions providing data*	2021 profile of attractions providing data*
North West	129	10%	12%
North East	88	7%	6%
Yorks/Humber	116	9%	9%
East Midlands	115	9%	9%
West Midlands	134	10%	8%
East	159	12%	12%
London	85	7%	7%
South East	244	19%	20%
South West	225	17%	18%
<b>Base size</b>	<b>1295</b>	<b>1295</b>	<b>978**</b>

## Response by area type

Category	No. of attractions giving 2022 & 2021 data	2022 profile of attractions providing data*	2021 profile of attractions providing data*
Coastal	161	12%	13%
Rural	672	52%	50%
Urban	462	36%	37%
<b>Base size</b>	<b>1295</b>	<b>1295</b>	<b>979**</b>

## Response by admission type

Category	No. of attractions giving 2022 & 2021 data	2022 profile of attractions providing data*	2021 profile of attractions providing data*
Free	413	32%	32%
Paid	882	68%	68%
<b>Base size</b>	<b>1295</b>	<b>1295</b>	<b>979**</b>

\* Based on sites providing data for the year before as well (e.g. when providing 2022 data, they also provided 2021 data).

\*\* One attraction group provided group level data for sites across England, which has been included in the trends data, without regional attribution.

Note: we are not showing 2019 above as the attraction category profile is in line with both 2020 and 2019.

# Attraction category examples

Attraction Category	Examples
<b>Castle / Fort</b>	Fort, Citadel, Defence Tower
<b>Country Park</b>	Forest Park (N.B. to qualify as an attraction they should include another attraction such as a visitor centre, botanical garden or historical monument)
<b>Distillery/ Vineyard/ Brewery</b>	Cider Farm, Alcohol Centred Attraction
<b>Garden</b>	Arboretum, Botanical Garden
<b>Heritage/ Visitor Centre</b>	Information/Orientation Centre, Park Ranger Centre, Heritage/Cultural Interpretation Centre
<b>Historic House/ House and Garden/ Palace</b>	House and Garden, Royal Residence
<b>Historic Monument / Archaeological Site</b>	Ancient Monument, Standing Stones
<b>Place of Worship</b>	Attractions of any religion that are <u>still in use</u> as places of worship, Churches, Chapels N.B. worshippers <u>should</u> be included in visitor numbers if possible.
<b>Other Historic Property</b>	Historic Ship, Lighthouse, Windmill, Watermill, Historic Workplace
<b>Leisure/ Theme Park</b>	Entertainment Park, permanent funfair
<b>Museum/ Art Gallery</b>	Including Industrial, Mining, Science, Transport Museums, and Galleries of Modern Art. N.B. Art centres, galleries and antique centres whose primary purpose is retail are not classified as 'attractions' for the purpose of this survey.
<b>Farm/ Rare Breeds/ Farm animals</b>	Attractions involving enclosed farm animals
<b>Nature Reserve/ Wetlands/ Wildlife trips</b>	Attractions that contain natural habitat environments for fauna, birds and wildlife, including wildlife trips i.e. seal/dolphin watching
<b>Safari Park/ Zoo/ Aquarium/ Aviary</b>	Attractions involving enclosed wild animals/birds/reptiles/insects etc
<b>Steam/ Heritage Railway</b>	Steam or heritage railways in working condition (not museum)
<b>Other Historic/ scenic transport operator</b>	Chair lift, cable car, sightseeing boat
<b>Industrial/ Craft Workplace</b>	Operating Industrial or craft attraction
<b>Science/ Technology Centre</b>	Science, Technology or Environmental Centres that are not museums
<b>Other</b>	Cave, model village, pier, sports stadium tour, waxworks

# Questionnaire: 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

Country Park

Distillery / Vineyard or Brewery

Garden

Heritage / Visitor Centre

Historic House / House and Garden/ Palace

Historic Monument / Archaeological Site

Place of Worship (still in use)

Other Historic Property

Leisure / Theme Park

Museum and / or Art Gallery

Farm / Rare Breeds / Farm Animals

Nature Reserve / Wetlands / Wildlife Trips

Safari Park / Zoo / Aquarium / Aviary

Steam / Heritage Railway

Other Historic / Scenic Transport Operator

Industrial / Craft Workplace

Science / Technology Centre

Other (*Please specify below*)

## 1.2 Which of these best describes the area of your attraction? Coastal / Rural / Urban

# Questionnaire: Visitors

**2.1 For 2021, 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 2021 visitor numbers:**

**2.2 What were your visitor numbers during the 2022 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 2022 (paid and free) fell into each category?** Adults % / Children % = Total 100%

**2.4 For 2020, your organisation provided us with a total number of schoolchildren visits of:**

**Approximately how many schoolchildren visited your attraction as part of an organised group in 2022?**

Number of schoolchildren **Is this number:** Exact? / An Estimate?

**2.5 Did you charge for admission to the main attraction in 2022?** No / Yes

**2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction...**

**(a) in 2022 (including VAT):** Adult / Child

**(b) In 2021 (including VAT):** Adult/ Child

**2.7 Origin of Visitors:** For 2021, your organisation provided us with a visitor profile of % from UK/ % from overseas. What percentage of total visitors in 2022 do you estimate were...?

**(ai) Domestic (live in the UK)**

**(aii) From overseas?**

**(bi) Compared with 2021, was the number of domestic visitors in 2022:** Up / Down / Similar

**(bii) Compared with 2021, was the number of visitors from overseas in 2022:** Up / Down / Similar

**2.8 i) What percentage of your total visitors in 2022 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %**

**ii) Compared with 2021, was the number of family group visitors in 2022:** Up / Down / Similar

# Questionnaire: Operations/ Marketing

## 3.1 Gross revenue

- a) How did the attraction's gross revenue in 2022 compare with 2021? Up / Down / Similar  
b) What was the percentage increase / decrease? %

## 3.2 Compared with 2021, was expenditure on marketing activities in 2022: Up / Down / Similar

## 3.3 Which of the following digital communications did your main attraction offer in 2022?

E-newsletters / Facebook page / Instagram/Pinterest / Twitter account / YouTube / TikTok / Other social media / Mobile apps / Online booking facility (tickets, events) / None of these

## 3.4 Was your main attraction closed for any of the following reasons in 2022?

- Open all year round  
Closed for part of the year– regular seasonal closure  
Closed for part of the year– as not profitable to open  
Closed for part of the year– for refurbishments/ repairs  
Closed for part of the year– it not being profitable to open  
Closed for part of the year– insufficient staff/ volunteers  
Closed for other reason not specified here

## 3.5 Many attractions have been affected by the increase in inflation and rising costs in 2022. What impact has this had on your site?

- (a) Rising energy costs  
(b) Rising wages  
(c) Rising supplier costs
- (i) No impact/ Not relevant to site  
(ii) Had to increase costs to visitors  
(iii) Reduced income for site  
(iv) Had to remove/ reduce certain services

# Questionnaire: Human Resources

**4.1 Compared with 2021, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2022 (including yourself, working owners and self employed)...?:**

**Permanent:** Up / Down / Similar / None

**Seasonal:** Up / Down / Similar / None

**Unpaid volunteers:** Up / Down / Similar / None

**4.2 And compared with 2022, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2023 to be:**

**Permanent:** Up / Down / Similar / None

**Seasonal:** Up / Down / Similar / None

**Unpaid volunteers:** Up / Down / Similar / None

**4.3 Are you back to pre-pandemic staffing levels?**

Yes/ No/ Don't know

# Questionnaire: Pre-booking & donations

## 5.1 During 2022 did you require visitors to pre-book visits to your site?

Yes – visitors were only allowed in if they pre-booked their tickets

No – but visitors had the option to pre-book their tickets in 2022

No – we did not offer pre-booking in 2022

## 5.2 Comparing 2022 with 2021, did you see the overall revenue from donations increase, stay the same or decrease?

Increased / Stayed the same / Decreased / We do not request/ accept donations

# Questionnaire: Funding

## 5.3 Did your organisation seek any additional funding during 2022, over and above what you would expect to receive in a typical year?

Yes, and we were able to secure what we needed

Yes, and we were able to secure part of what we needed

Yes, but we were unsuccessful in securing funding

No, we did not seek any additional funding

## 5.4. Which of the following are reasons for seeking additional funds during 2022?

Building or site development

Implementing new technology or systems

To help cover rising costs

Support financial recovery following COVID-19

To enable us to hire and/ or train more staff

Other

## 5.5 Are you aware of any of the following funding sources? You can see a description of each by hovering your mouse over the funding type.

Crowdfunding / Peer to peer lending / Community shares / Mezzanine finance / Impact investment funds / Social Impact Bonds / Government funding (e.g. grants) / Industry body funding / Bank loans

## 5.6 Why didn't you use [INSERT FUNDING TYPE]?

I don't think we qualify for this

Don't know enough about this type of funding

Don't know enough about how to apply

Don't have staff/support with the right skills to apply

Prefer to use informal funding channels

Other (please specify)

# Questionnaire: Audience engagement/ provisions

**5.7 Which, if any, of the following does your organisation offer as a way to engage with your audience online and/ or develop your online revenue streams?**

- Offered online tours/ video content - for free
- Offered online tours/ video content – at a cost
- Offered home-schooling/ family content – for free
- Offered home-schooling/ family content – at a cost
- Offered online learning (schools/adults) – for free
- Offered online learning (schools/adults) – at a cost
- Developed your online retail offer
- Digitised collections
- Used augmented reality on site
- None of these

**5.10 Thinking about accessibility provisions at your attraction, have you recently made or are you planning to...**

- a) Improve the built environment, amenities and services for visitors with accessibility requirements**
- b) Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements**
- c) Improve the information, marketing and digital inclusion for visitors with accessibility requirements**

Have done in previous 12 months / Clear plans for the next 12 months / Clear plans for further ahead / Are considering, but no firm plans / No plans to consider this at the current time.

# Questionnaire: Sustainability

## 5.11 Finally, thinking about sustainability, which of the following apply to your organisation?

We have an environmental business strategy

We have a budget to help meet environmental objectives

None of these

## 5.12 You will now be shown several energy saving/ retrofit measures. For each, please tell us whether your site already has this, or would consider installing or implementing it in the future.

Already installed or implemented / Already planned or budgeted implementation / Would consider installing or implementing in future / Not possible or relevant at this site / Unlikely to implement for other reasons

- a) Adjustable thermostats
- b) Low energy lighting
- c) Draft proofing/ stripping
- d) Double or triple glazed windows
- e) Secondary glazing
- f) Solar panels
- g) Smart meters
- h) Other renewable electricity or heating
- i) Electric charging points for staff/ visitors
- j) Encouraging staff/ visitors to travel via public transport