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VisitEngland

# Visitor Attraction Trends in England 2024

18th June 2025

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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.

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VisitEngland is grateful to Historic England for their financial support for the 2025 survey.



# 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, crafts, theatrical, music or film performances. It must be open to the public, with or without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc.”*



## 2. Headlines

# 2024 Visitor Attraction Trends

Attractions in England reported a 1.4% increase in total visits from 2023 to 2024. Recovery following the COVID-19 pandemic slowed in 2023 and has levelled off in 2024. This means there remains a shortfall in visit volumes against 2019 levels.



+7%

**The increase in 2024 adult admission fees** was higher than the rate of inflation at the end of 2023 (when most prices would have been set).



+8%

**Gross revenue** increase in 2024 compared with 2023 reflects admission price rise.

Admissions volume for participating attractions

	2019	2020	2021	2022	2023	2024
Number of visits	275.86 million *	96.55 million *	125.52 million *	178.23 million *	197.84 million	200.67 million
Annual % change in visits	/	-65%	+30%	+42%	+11%	+1.4%
% difference from 2019 visit volume	/	-65%	-55%	-35%	-28%	-27%

2024 and 2023 visitor volume was provided through the survey

\* Previous visitor volume is an estimation based on the sector trends recorded through this research.

# Headlines: Visit Volume

**Attractions in England reported a 1.4% increase in total visits from 2023 to 2024.** This levels off a period of recovery since the Covid-19 pandemic, leaving overall admissions to England's visitor attractions in 2024 still 27% below 2019 levels.

*Limited growth in visits to attractions in 2024 is consistent with a decrease in domestic day and overnight trips and is set against the backdrop of the ongoing cost-of-living crisis.*

**Domestic visit volumes to England attractions in 2024 were down -1% year on year, whilst Overseas visit volumes to England attractions in 2024 were up 6% year on year** (based on sites who provided all of: % of visitors from overseas/ UK and total admissions for both 2023 and 2024).

**The rate of change in visitor admissions was lower across nearly all attraction categories in 2024 compared with 2023, ranging from -2% to +11%.** Some attraction categories have returned to their pre-pandemic growth trajectory; however, with limited year on year growth in 2024, there continues to be a shortfall compared to 2019 for some.

**Museums/ Art Galleries show the greatest continued shortfall compared to pre-pandemic levels,** having suffered one of the sharpest declines and limited recovery over the last 12-months.

**There is a mixed picture for admission trends by region in 2024.** London reported the most notable change, with growth of +5% (benefiting from the healthy inbound overseas market) whilst other regions reported year on year changes ranging from decreases of -3% to increases of +3%.

**Actions that boosted visits among the highest performing attractions included:**

- Increased opening times
- Popular / temporary/ new exhibitions
- Extended/ enhanced facilities – exhibition spaces, play areas, catering facilities
- Increased PR / Marketing activity: TV/ News / Film coverage; Targeted / increased social media presence
- New focused staffing positions
- Investment / funding

For sites where year on year visit volumes were down the most, key drivers included:

- Closures – planned and unplanned
- Reduced opening times
- Less successful programming in 2024/ blockbuster in 2023
- Change in pricing structure

Additionally, the cost of living crisis, weather and for some the civil unrest / riots of Summer 2024 also had an impact.

# Headlines: Impact of Rising Costs

**Inflation may have fallen during 2024, but rising costs continued to affect the majority of attractions.**

**Notable proportions of attractions in 2024 reported they were affected by rising energy costs (69%), supplier costs (76%) and staff costs (63%).**

**Sites continue to find it difficult to absorb these costs.**

The impact of **rising supplier costs** was the most wide-reaching of these challenges and was most notable among larger sites, with over 100,000 visits a year, (81%). Over half of both charging sites and sites with over 20k visitors had to increase costs to visitors as a result, and it was also the challenge free sites reported impacted their visitors the most, with 20% saying they had to increase their costs to visitors.

The impact on sites of **rising staff costs** is also notable, affecting close to two-thirds of attractions. 32% of attractions had to increase costs to visitors and 11% reported removal/reduction of services as a result of this challenge.

**Increased energy costs and rising supplier costs** both impacted the income generated at sites for at least 4 in 10 attractions, affecting both paid and free sites and across attraction sizes.



# Headlines: Revenue & Admission Pricing

**Gross revenue at visitor attractions increased by 8% in 2024.**

Indexing average levels of revenue growth suggests that this is now on an even stronger trajectory than it was prior to the pandemic.

*Above inflationary increases in admission fees in recent years, and again this year, will have contributed to gross revenue recovering more quickly than visitor admissions.*

*Rising staff, energy, supplier costs etc. during 2024 will again likely offset this higher revenue, meaning the impact on profit margins is likely to be more modest.*

**For the first time since 2019/20, in 2024 'Paid' and 'Free' sites report broadly the same annual % change in gross revenue (+8% and +7% respectively).**

**Adult peak season entrance prices rose by 7% in 2024 to an average price of £12 (£1 more than in 2023).**

**83% of charging attractions, charged for child entry, similar to in 2022 and 2023.**

In 2024 the average child entry price was £8.04. While still increasing, the inflation for child admission charges was a little lower than for adult prices at 6% on average.

**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.** The average entrance fee for small attractions, with 20,000 visits or less is £8.47 and this rises to £18.74 amongst attractions with over 100,000 visitors a year.



Locomotive 2857 pulling a series of carriages leaving the heritage station. Worcestershire, England  
© Chris Bentham

# Headlines: Marketing & Digital Communication

Fewer attractions reported marketing spend was up year on year than in other post-pandemic years. However, 2 in 10 sites do report a marketing spend increase, compared to 1 in 10 reporting a decrease.

The likelihood that attractions had increased marketing expenditure in 2024 increased with attraction size: 3 in 10 larger attractions (>100k annual visits) reported marketing spend up year on year.

## Marketing spend year on year change...

### ...varied by region:

- Above average ‘% reporting increase’ : ‘South West’; ‘South East’ and ‘London’ *though notably for London sites this was not as high above the average as in 2023 or 2022.*
- Above average ‘% reporting decrease’ : ‘West Midlands’, ‘East Midlands’ and ‘Yorkshire & Humber’

### ...and varied among attraction category:

- Notably above average ‘% reporting increase’: ‘Gardens’, ‘Leisure/Theme parks’ and ‘Other’ attractions (e.g. tours, piers or sports stadiums)

### Use of digital communications continues to be high. 94% of visitor attractions used some form of digital media in 2024:

Facebook being most common (90%), followed by Instagram (71%) and E-newsletters (59%).

Typically, use of digital communication platforms correlates positively with increasing attraction size.

‘Online booking’ is offered by 57% of all attractions and its availability increases with attraction size.

Use of X (formerly Twitter) declined again in 2024 (40% in 2024, 62% in 2022).

‘Gardens’ and ‘Leisure/ Theme Parks’ employed the broadest spread of digital communications.



Aerial view of a large crowd gathering at a stone monument during Summer Solstice. Stonehenge, Wiltshire, England © VisitBritain/Chris Gorman/English Heritage

# Headlines: Employment

**Looking at year on year net changes in staff numbers (% increasing 'minus' % decreasing), there were 'Net' year on year increases in numbers of all types of staff working at England attractions in 2024.**

Unpaid volunteers saw the biggest increase (Net:+24%), followed by Apprenticeships (Net:+17%). Net change for permanent and seasonal staff was a more modest Net:+4% for each.

*With pressure on budgets due to wage inflation, unpaid volunteers are becoming even more essential to the running of many attraction categories.*

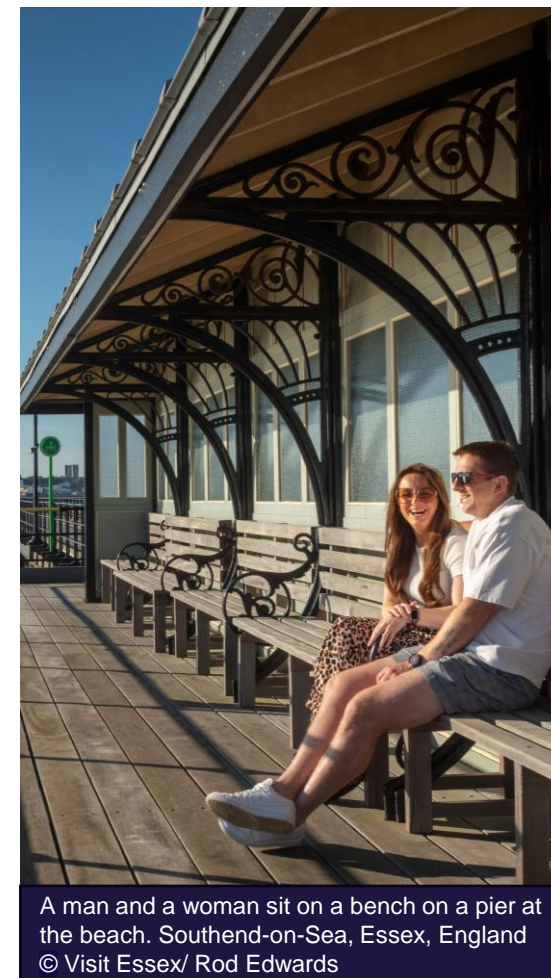
**82% of all attractions utilised unpaid volunteers in 2024 and we saw the pool of volunteers extend across all attraction categories, sizes and charging types.**

'Free' and 'smaller attractions (<20k annual visits)' saw above average proportions using volunteers.

**Looking ahead to 2025, the expectation is for further growth of volunteer workers, but no change in numbers of permanent staff and little change for apprenticeships. A small overall reduction in seasonal workers is also anticipated.**

**Apprenticeships are also becoming increasingly popular. 22% of attractions employed apprentices in 2024** and becomes more common as the volume of admissions increases, with 46% of sites with over 100,000 visits a year employing apprentices.

**Attractions faced some challenges in recruiting the right people for the roles at their sites in 2024.** The primary impact of recruitment challenges were for existing staff members, but could sometimes translate into impacts for visitors too through reduced services.



A man and a woman sit on a bench on a pier at the beach. Southend-on-Sea, Essex, England  
© Visit Essex/ Rod Edwards

# Headlines: Accessibility & Sustainability

**45% of attractions invested in enhancements to accessibility provision within the last 12 months.**

Implemented by around a quarter of sites, and with a further quarter saying they were including them in future plans were:

- *Staff training*
- *Changes to built environment/ amenities/services*
- *Improved accessibility of communications*

**In terms of broader organisational impact: 77% of attractions report having one or more strategies in place to embed regenerative tourism / sustainable practices.**

Having an 'Environmental Strategy' is the most common (61%), but 'social' and 'governance' strategies are each in place at around half of attractions.

Attractions in London and the North (*North West, North East, Yorkshire & Humber*) are most likely to have strategies in place to embed regenerative tourism / sustainable practice(s).

**39% of attractions measure their carbon footprint.**

**32% of sites invested in energy saving/ carbon reduction measures in 2024, rising to 56% among large attractions (>200k annual visits).**

**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 these.** Installation of smart meters, to monitor energy use continues to be the fastest growing sustainability action, rising to 42% of sites in 2025, from 36% of sites in 2024 and 25% in 2023.

**Among attractions who invested in energy saving measures the proportion that did so using public funding / grants increased to around a quarter in 2024, from 15% in 2023; however, the majority still self-financed – despite around half being aware of grants.**



Colourful hanging floral installation in a large glass house filled with plants. Kew, Greater London, England © RBG Kew/Jeff Eden

## 3. Context

# 2024 Context: Weather Summary

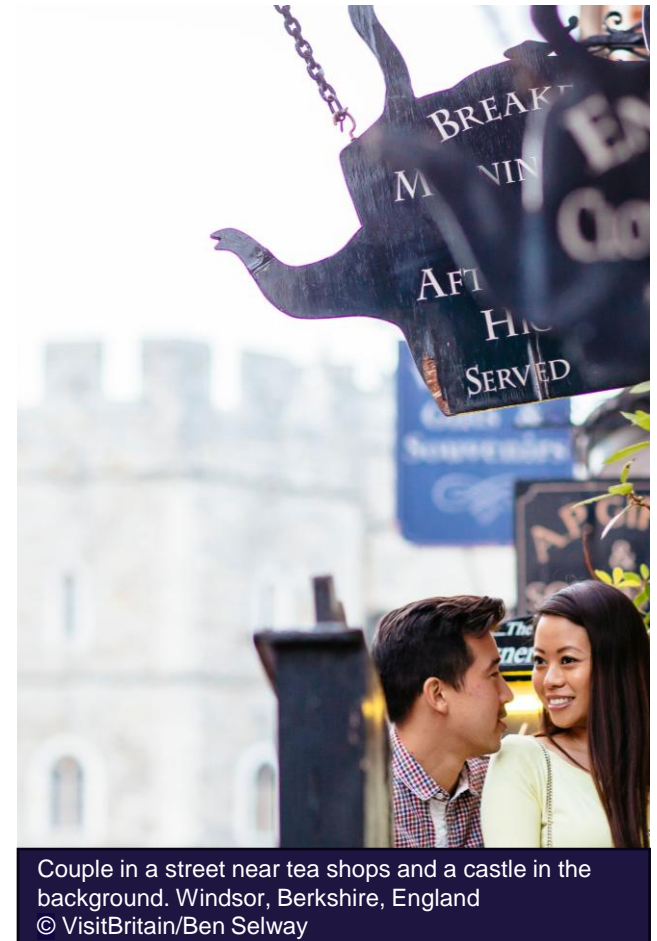
**Overall, 2024 was a warm and unsettled year for the UK. Much like 2023, 2024 broke both temperature and rainfall records, with storms and snow also hitting the headlines and having real-life impact.**

**Spring 2024 was the warmest on record** despite appearing cloudy. It was also exceptionally wet, with rainfall 32% above normal, making it the UK's sixth wettest spring.

**The UK experienced its coolest summer since 2015**, with an average temperature slightly below the long-term average. It was a relatively calm season, lacking major heatwaves or notable extremes — a contrast to recent hotter summers.

**Autumn began with record-breaking rainfall in parts of England**, including the wettest September ever for ten counties. Gloucestershire recorded its wettest autumn since 1836.

**Winter 2023/24 was in the top 10 warmest and wettest for the UK.** Winter 2024 delivered three named storms in just three months, with Storms Ashley, Bert, and Darragh bringing heavy rain, strong winds, and snow, resulting in widespread flooding in parts of southern and central England.



Couple in a street near tea shops and a castle in the background. Windsor, Berkshire, England  
© VisitBritain/Ben Selway

# 2024 Context: Inbound tourism

## About this data:

Official data from the International Passenger Survey (IPS) is available to December 2024 at time of writing, although figures are provisional and subject to change, with final data due in July/August 2025. The provisional data from the ONS only covers inbound visits to Great Britain, but VisitBritain has estimated UK numbers, shown in the table below. We advise users to note the ONS' badging of the Q3 and Q4 data as 'official statistics in development' due to methodological changes.

## Patterns in inbound visit volumes:

This data shows 39.5m visits, up 4% on 2023 although down 3% on 2019. There was strong year-on-year-growth in the first half of the year. The provisional data suggests a decline in the second half of the year, but this data does not align with other sources, which suggest moderate growth. The ONS will conduct further investigation into the survey design and administrative data used for calibration to better understand this difference. Visits grew faster from European markets, in aggregate, in 2024, although long haul markets have shown a slightly higher pace of recovery vs 2019. Visits to friends or relatives increased to a new record; holiday visits remain below 2019 levels.

## Trends in the value of spending among inbound visitors:

Spending was on par with 2023 in nominal terms but down in real terms (i.e. when adjusting for inflation). Average length of stay fell in 2024, pushing down spend per visit. Spend per visit is much lower than 2019 levels in real terms.

Total	2019	2020	2021	2022	2023	2024* VisitBritain estimate
Visits (000)	40,857	11,101	6,384	31,244	37,959	39,531*
Spend (£m)	£28,448	£6,210	£5,646	£26,497	£31,075	£31,183*

Source: International Passenger Survey by ONS; VisitBritain estimate for 2024

\*The VisitBritain estimate is based on the current provisional IPS data for 2024, adjusted to include NI data. This is subject to change



# 2024 Context: Domestic tourism

## Domestic tourism day visits\*: England

There were 906 million tourism day visits in England in 2024, a decrease of 12% when compared to 2023.

Spend on tourism day visits in England in 2024 rose by 6% in the same time period, to £48.4 billion.

Average spend per visit (per person) saw an increase from £44 in 2023 to £53 in 2024.

Total figures	2022	2023	2024	Change vs 2023
Visits (million)	951	1,030	906	-12%
Spend (£ million)	£39,523	£45,579	£48,405	+6%
Average spend per trip	£42	£44	£53	+21%

## Domestic overnight trips: England

There were 89.6 million domestic overnight trips in England in 2024, 10% below 2023 level.

Trip spend in England in 2024 was £27.3 billion, representing an increase of 5% since 2023.

Total figures	2023	2024	Change vs 2023
Trips (million)	99.4	89.6	-10%
Spend (£ million)	£26,045	£27,336	+5%
Average spend per trip	£262	£305	+16%

### SOURCE: VisitEngland GBTS: 2024

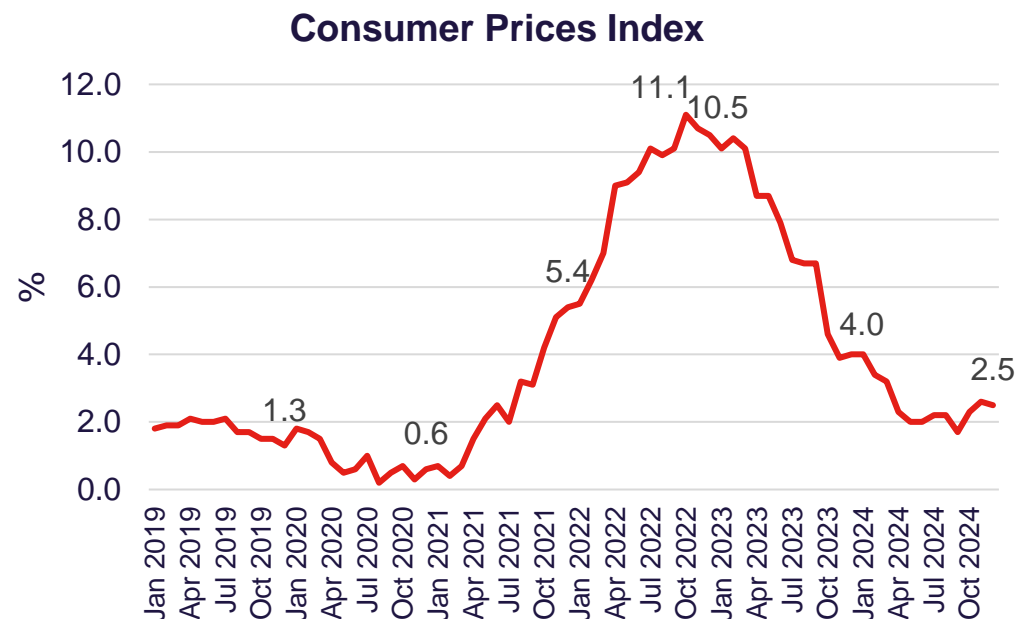
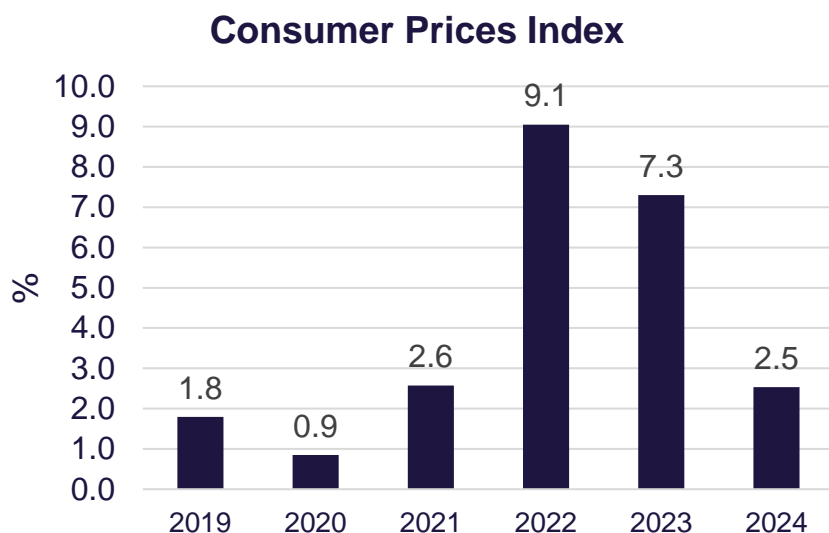
\*Definition Tourism Day visits: Lasted 3 hours or more (including travel time) , undertake 1 or more eligible leisure activities , not overnight, Undertaken less often than once a week, includes a visit to a place outside of the local authority where the trip started, with the exception of visits where the main activity is a visitor attraction, attending a public event or to watch live sport.



# 2024 Context: Cost of living

During the first half of 2024 the UK inflation rate, as measured by the Consumer Prices Index (CPI) continued to decline and by May 2024 had fallen to 2.0% (the Bank of England's target) for the first time since July 2021. Inflation rates began to increase in the final quarter of 2024.

UK consumers' feelings about their own personal financial situation throughout 2024, measured in VisitEngland's Domestic Sentiment Tracker, saw a slightly lower proportion, compared to a year prior, reporting they were negatively affected by the cost-of-living crisis. However, two-thirds of UK consumers remained either 'cautious and being very careful' or 'hit hard and cutting back'.



The logo for Visit Britain, featuring a stylized Union Jack flag above the text "VISIT BRITAIN".

**VISIT**  
BRITAIN

The logo for Visit England, featuring a stylized Tudor rose above the text "VisitEngland".

VisitEngland

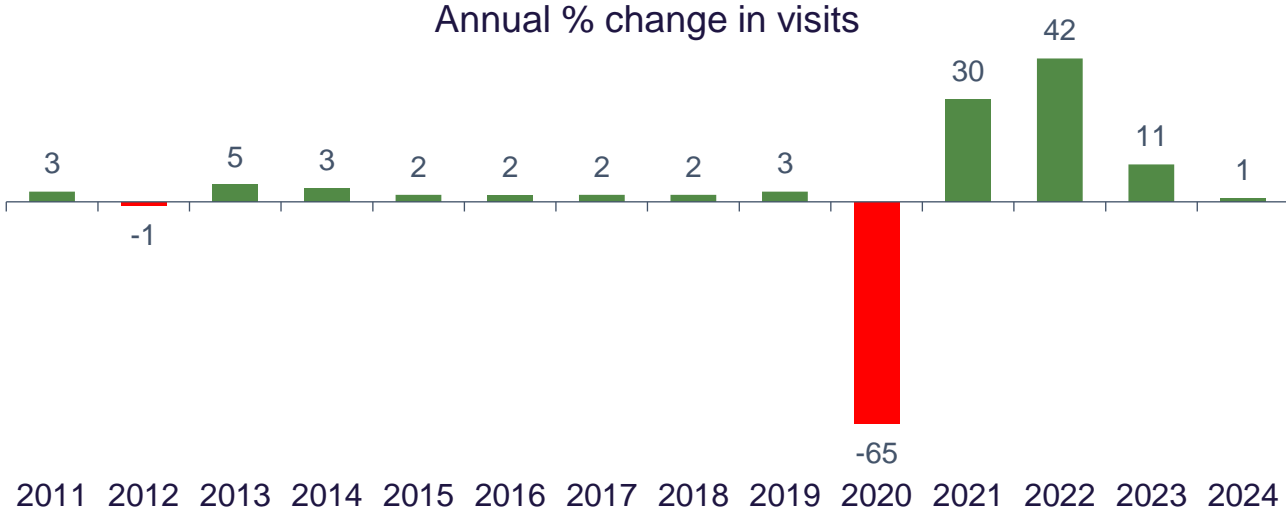
## **4. Visitor admission trends**

# Overall Visitor Admission Trends

**Admissions to English attractions in 2024 increased 1.4% compared to 2023 levels.**

This levels off a period of recovery since the Covid-19 pandemic and leaves overall admissions in 2024 still 27% below 2019 levels.

Limited growth in visits to attractions in 2024 is consistent with a decrease in domestic tourism day and overnight trips.



	2019	2020	2021	2022	2023	2024
Number of visits	275.86 million*	96.55 million*	125.52 million*	178.23 million*	197.84 million	200.67 million
% difference from 2019 visit volume	/	-65%	-55%	-35%	-28%	-27%

2024 and 2023 visitor volume was provided through the survey \*Previous visitor volume is an estimation based on the sector trends recorded through this research.

# Reasons for Declines in Admissions

16% of attractions reported a decrease in visitor admissions of over 10% in 2024 compared to 2023. Attractions provided a variety of reasons to explain these declines:

## Key market drivers:

- Cost of living crisis, affecting consumer day trips
- Wet / poor summer weather (affecting outdoor attractions)
- Impact of civil unrest / riots (Summer 2024)

## Localised events outside attractions control:

- Road closures/ building works affecting access
- Major event last year attracting visitors to local area not taking place this year

## Key attraction specific drivers:

- Closures – both planned and unplanned
- Reduced opening times / more private hire
- Less successful programming in 2024/ blockbuster in 2023 / less reasons for repeat visits
- Change in pricing structures

*“Previously, charging admission for special exhibitions only. This year, charging for general admission as well”*

*“The temporary exhibitions on offer during 2023 were significantly more popular, with a much broader appeal, than the temporary exhibition that was in situ for 8 months of 2024”*

*“Our car park was closed, the summer weather was poor with less tourists coming to the area. People appear to have less disposable income presently and paying to go into an attraction seems to be a bit of a luxury”*

*“closed on a Monday and Tuesday to reduce our overheads following public funding cuts”*

*“Impact of cost of living on individuals and negative impact of local city centre disruption, civil unrest etc which had a high impact on our numbers over the usually busy summer period”*

*“Wet and stormy weather during our busy periods”*

*“We increased the price of tickets by an average of 20% as prices had not been increased in about eight years. This increased income generation but not visitor numbers”*

*“Major renovation works at on the site”*

# Reasons for Increases in Admissions

A quarter of attractions reported an increase in visitor admissions of over 10% in 2024 compared to 2023. Explanations for these increases included:

## Key market drivers:

- Continued recovery from Covid-19 pandemic (incl. return of Overseas markets)
- Weather (favourable)

## Key attraction specific drivers:

- Increased opening times / 2023 closures
- Temporary/ new exhibitions
- Extended/ enhanced facilities – refurbishment exhibition spaces, play areas, catering
- Increased PR / Marketing – TV/ News / Film coverage / more targeted / increased social media presence
- Staff – new roles (comms, visitor experience)
- Investment / funding

*“Focused social media marketing. Good PR with several large articles in the national press”*

*“Improved programming that fits the property theme throughout the year mixed with visit driving marketing”*

*“First half of the year is the effect of the new indoor playbarn, majority of volume growth came in this first 6 months of 2024”*

*“We were still recovering from our COVID slump and we added Sunday opening to our existing Saturday opening from April 2024”*

*“Groups from China travelling again, continued recovery after the pandemic”*

*“We increased the number and range of events we hosted. We were also able to employ a visitor manager”*

*“A dry August, and an excellent attendance at our Christmas Illuminations”*

*“Investment in new attractions and extensive marketing. We have had a similar growth each year for the last few years, and hopefully it will continue for a few more years as we have significant investment going into the site this year and next”*

*“General upturn in visitor numbers particularly generated by a 7 week exhibition which attracted a lot of visitors during January, February and March”*

# Visitor Admission Trends 2024: By Attraction Category

The rate of change in visitor admissions was lower across nearly all attraction categories in 2024 compared with 2023, ranging from -2% to 11%.

Farms (+11%), Visitor/Heritage Centres (+6%), Places of Worship (+5%) and Historic Houses/Castles (+3%) reported the biggest year on year increases, whilst Country parks (-2%), Workplaces (-2%), Leisure/Theme Parks (-2%) and attractions categorised within 'Other' (-3%) all reported a year on year contraction in visitor admissions.

Museums/Art galleries and Other historic properties, which both suffered some of the sharpest declines in visitors as a result of the Covid-19 pandemic, have each shown growth of 2% year on year.

## Visitor admission trends: By Attraction Category

	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Total Average</b>	<b>+1</b>	<b>+11</b>	<b>+42</b>	<b>+30</b>	<b>-65</b>
<b>Country Parks (52)</b>	<b>-2</b>	<b>*</b>	<b>- 2</b>	<b>+1</b>	<b>-7</b>
Farms (24) <sup>&lt;50</sup>	+11	+5	+17	+58	-50
<b>Gardens (67)</b>	<b>+2</b>	<b>-1</b>	<b>+7</b>	<b>+40</b>	<b>-40</b>
<b>Historic Houses/Castles (306)</b>	<b>+3</b>	<b>+13</b>	<b>+32</b>	<b>+46</b>	<b>-57</b>
<b>Other Historic Properties (121)</b>	<b>+2</b>	<b>+9</b>	<b>+51</b>	<b>+57</b>	<b>-74</b>
Leisure/Theme Parks (25) <sup>&lt;50</sup>	-2	*	+6	+47	( <sup>&lt;10</sup> )
<b>Museums/Art Galleries (428)</b>	<b>+2</b>	<b>+20</b>	<b>+114</b>	<b>+18</b>	<b>-76</b>
Steam/Heritage Railways (15) <sup>&lt;50</sup>	*	+12	+7	+118	-55
<b>Visitor/Heritage Centre (75)</b>	<b>+6</b>	<b>+14</b>	<b>+49</b>	<b>+46</b>	<b>-66</b>
<b>Wildlife Attractions/Zoos (53)</b>	<b>*</b>	<b>+6</b>	<b>+20</b>	<b>+32</b>	<b>-41</b>
Workplaces (18) <sup>&lt;50</sup>	-2	+8	+55	+51	-56
Places of Worship (40) <sup>&lt;50</sup>	+5	+19	+117	+49	-73
Other (23) <sup>&lt;50</sup>	-3	*	+25	+35	-82

\* % change is under 1%,

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

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



# 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.



Sculptured water features and gardens outside a spectacular palace. Blenheim, England. © Blenheim Palace

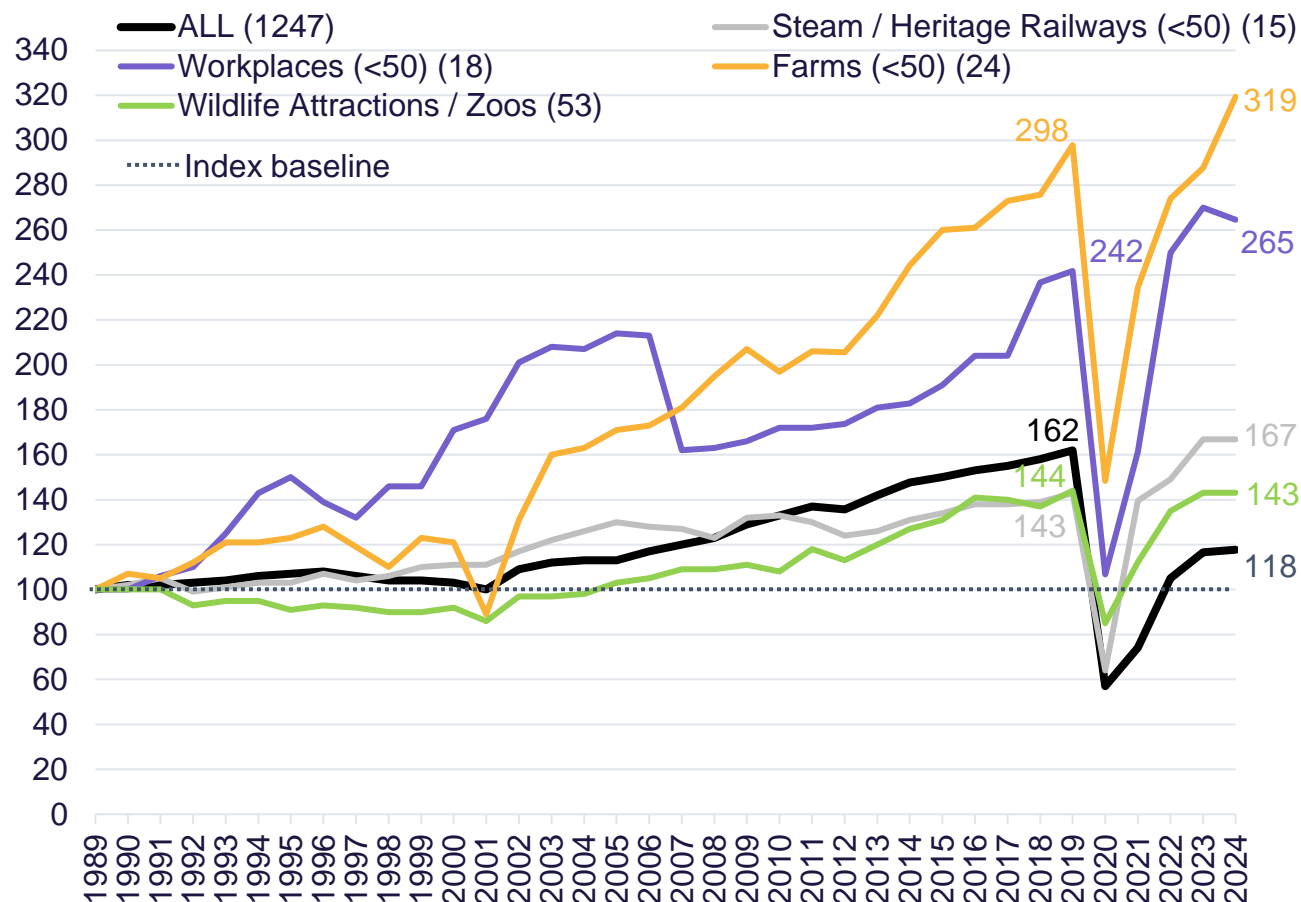
# Index of Visits to Attractions: Best Performing Sectors over the long term

This chart illustrates the attraction categories that have recovered most quickly following the COVID-19 pandemic.

**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. Admissions in 2024 were 18% above the 1989 baseline (index of 118), but remain significantly lower than pre-pandemic levels.**

Indexes show that Farms, Workplaces and Steam/ Heritage railways have made a full recovery post COVID, exceeding 2019 admission levels and returning to their previous growth trajectory (*although caution should be applied in interpretation of these figures due to low base sizes of these categories*).

Wildlife attractions/ Zoos also continued to perform well and recorded higher admissions than in 2018 and almost back to 2019 levels.

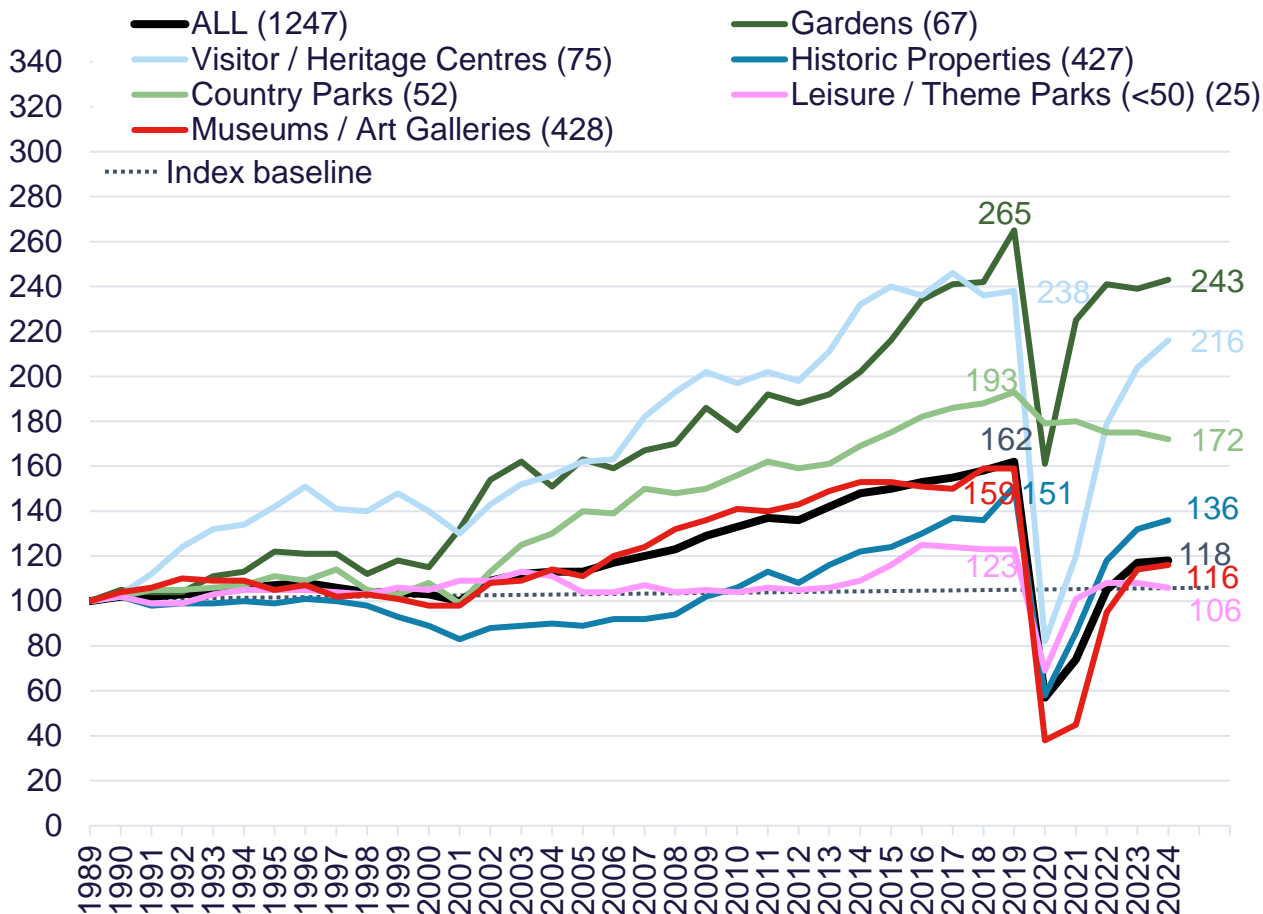


# Index of Visits to Attractions: Other Sectors performance over the long term

This chart illustrates the attraction categories that have not yet recovered to pre-pandemic admission levels. Positively, all categories do continue to operate above the 1989 benchmark in terms of visitor volume, but there continue to be some shortfalls compared to 2019.

Country Parks were least affected by the pandemic, but have continued to decline in 2024. Gardens recovered quickly but have shown limited growth since 2021, remaining below pre-pandemic levels. Opportunities for growth among outdoor attractions likely hindered by wet weather in 2024.

Both Visitor/Heritage Centres and Historic Properties have continued to recover in 2024, whilst Museums/ Art Galleries show the greatest shortfall compared to pre-pandemic levels with limited recovery over the last 12-months.



# Visitor Admission Trends 2024: By Region

There is a mixed picture for admission trends by region in 2024. London reported the most notable change, with growth of +5% whilst other regions reported year on year changes ranging from decreases of -3% to increases of +3%.

The **East of England** (-3%), **West Midlands** (-2%) and the **North West** (-1%) experienced overall decreases in visitor admissions.

The **North East** (+3%), **Yorkshire and Humber** (+2%), **East Midlands** (+2%) and **South East** (+1%) reported increases in admissions.

With greater reliance on international tourism than other areas, London attractions are likely to have benefitted most from the continued recovery in inbound visits in 2024.

## Visitor Admission Trends: By Region

	2023/2024 change [%]	2022/2023 change [%]	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
<b>Total Average</b>	+1	+11	+42	+30	-65
<b>North West (132)</b>	-1	+6	+42	+57	-62
<b>North East (69)</b>	+3	+7	+29	+45	-68
<b>Yorks /Humber (133)</b>	+2	+5	+36	+45	-54
<b>East Midlands (107)</b>	+2	+8	+16	+22	-50
<b>West Midlands (115)</b>	-2	+6	+19	+30	-53
<b>East (162)</b>	-3	+4	+19	+29	-40
<b>London (88)</b>	+5	+26	+141	+12	-77
<b>South East (217)</b>	+1	+6	+20	+17	-58
<b>South West (224)</b>	*	+6	+20	+52	-60

# Visitor Admission Recovery vs. 2019: By Region

Looking at recovery compared with 2019 visit volumes by region, all regions continue to fall below pre-covid levels and for most recovery halted in 2024.

The South East and North East continue to display the lowest recovery, at 37% down and 34% down respectively, compared with 2019.

The East of England and Yorkshire & Humber, some of the regions least affected by the pandemic, remain the regions to have returned closest to 2019 levels.

London was the worst hit region by the pandemic, with limited recovery in 2021, but has maintained momentum since and has again outperformed the average in terms of recovery vs. 2019. London attraction admissions now 18% below pre-pandemic levels.

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

2024 and 2023 visitor volume was provided through the survey. This was calculated for participating sites for 2022, 2021 and 2020 based on regional averages, and then converted into the percentage change.

	2019/ 2024 change [%]	2019/ 2023 change [%]	2019/ 2022 change [%]	2019/ 2021 change [%]	2019/ 2020 change [%]
<b>Total average</b>	-27	-28	-35	-55	-65
<b>North West (132)</b>	-11	-10	-15	-40	-62
<b>North East (69)</b>	-34	-36	-40	-54	-68
<b>Yorks /Humber (133)</b>	-3	-4	-9	-33	-54
<b>East Midlands (107)</b>	-22	-24	-29	-39	-50
<b>West Midlands (115)</b>	-24	-23	-27	-39	-53
<b>East (162)</b>	-7	-4	-8	-23	-40
<b>London (88)</b>	-18	-22	-38	-74	-77
<b>South East (217)</b>	-37	-37	-41	-51	-58
<b>South West (224)</b>	-22	-23	-27	-39	-60

# Visitor Admission Trends 2024: By Admission Charge, Area Type & Attraction Size

There is little variation in admissions trends by admission type (paid/free) and area type (coastal/rural/urban) –all reporting year on year visitor admission increases in line with the average.

However, when looking by attraction size, size of attraction correlates with year on year % change in visitor admissions. Smaller attractions with annual visits of 20,000 visitors or less report a -2% decrease in visitor admissions, whilst, at the other end of the scale, larger attractions, with annual visits over 200,000 report a +2% increase in visitor admissions compared to 2023.

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

	2023/2024 change [%]	2022/2023 change [%]	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
<b>Total Average</b>	+1	+11	+42	+30	-65
<b>Free (408)</b>	+1	+14	+79	+19	-71
<b>Paid (839)</b>	+1	+8	+24	+37	-60
<b>Coastal (152)</b>	+2	+7	+16	+47	-59
<b>Rural (616)</b>	+1	+6	+12	+30	-47
<b>Urban (479)</b>	+2	+17	+94	+23	-74
<b>20,000 visits or less (516)</b>	-2	+8	+48	+36	-68
<b>20,001 – 50,000 visits (208)</b>	*	+11	+40	+56	-66
<b>50,001 – 200,000 visits (297)</b>	+1	+9	+28	+39	-58
<b>Over 200,000 visits (226)</b>	+2	+11	+46	+26	-66

# Visitor Admission Trends 2024: Among Free Attractions and Among Paid Attractions

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

## Visitor Admission Trends: Free Attractions

Free Attractions	2023/2024 change [%]	2022/2023 change [%]
<b>ALL FREE (408)</b>	+1	+14
Country Parks (19) <sup>&lt;50</sup>	-6	+3
Farms <sup>&lt;10</sup>	(<10)	+6
Gardens <sup>&lt;10</sup>	(<10)	(<10)
Historic Houses/Castles (17) <sup>&lt;50</sup>	+8	+17
Other Historic Properties (25) <sup>&lt;50</sup>	+5	*
Leisure/Theme Parks <sup>&lt;10</sup>	(<10)	(<10)
<b>Museum/Art Galleries (243)</b>	+2	+22
Steam/Heritage Railways <sup>&lt;10</sup>	(<10)	(<10)
Visitor/Heritage Centres (42) <sup>&lt;50</sup>	+6	+4
Wildlife Attractions/Zoos <sup>&lt;10</sup>	(<10)	(<10)
Workplaces <sup>&lt;10</sup>	(<10)	(<10)
Places of Worship (30) <sup>&lt;50</sup>	+5	+15
Other (<10)	(<10)	(<10)

## Visitor Admission Trends: Paid Attractions

Paid Attractions	2023/2024 change [%]	2022/2023 change [%]
<b>ALL PAID (839)</b>	+1	+8
Country Parks (33) <sup>&lt;50</sup>	+2	-2
Farms (18) <sup>&lt;50</sup>	+10	+4
<b>Gardens (64)</b>	+2	-1
<b>Historic Houses/Castles (289)</b>	+2	+13
<b>Other Historic Properties (96)</b>	+2	+12
Leisure/Theme Parks (22) <sup>&lt;50</sup>	-1	*
<b>Museum/Art Galleries (185)</b>	-1	+12
Steam/Heritage Railways (14) <sup>&lt;50</sup>	*	+12
Visitor/Heritage Centres (33) <sup>&lt;50</sup>	+5	+26
Wildlife Attractions/Zoos (45) <sup>&lt;50</sup>	*	+6
Workplaces (14) <sup>&lt;50</sup>	-1	-6
Places of Worship (10) <sup>&lt;50</sup>	+4	(<10)
Other (16) <sup>&lt;50</sup>	-3	+4

Base: All attractions providing visits data for current and previous year Paid (839) Free (408)  
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 2024: Region by Admission Charge & Area Type

Highest levels of above average growth were reported by: London attractions (Paid & Free); 'Free' South East attractions; 'Rural' attractions in the North East and Yorkshire & Humber.

'Free' and 'Rural' East of England attractions reported the most notable year on year decreases in visits.

*(Findings should be treated with caution due to some low base sizes).*

## Visitor Admission Trends 2024: Regional breakdown by admission charge & area type

2023/24 change %	Free	Paid	Coastal	Rural	Urban
<b>Total Average</b>	+1	+1	+2	+1	+2
<b>North West (132)</b>	-3	*	(<10)	*	-2
<b>North East (69)</b>	*	+4 <50	+1 <50	<b>+5 &lt;50</b>	+1 <50
<b>Yorks/Humber (133)</b>	+1	+2	(<10)	<b>+6</b>	-2
<b>East Midlands (107)</b>	-1 <50	+4	(<10)	+2	+1 <50
<b>West Midlands (115)</b>	-4 <50	*	(<10)	*	-3
<b>East (162)</b>	<b>-5</b>	-1	-3 <50	<b>-5</b>	+3 <50
<b>London (88)</b>	<b>+5 &lt;50</b>	<b>+6 &lt;50</b>	(<10)	(<10)	+3
<b>South East (217)</b>	<b>+6</b>	*	-1 <50	*	+5
<b>South West (224)</b>	-1	*	-1 <50	*	+2 <50

Base: All attractions providing visits data for current and previous year (1247)  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

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

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# Visitor Admission Trends 2024: Child Visits Summary

The volume of children visiting attractions decreased by -2% from 2023 to 2024, falling below the total sector growth of +1%.

School trips continued to increase, despite challenging market conditions, and albeit at a slower rate than other years of recovery post-pandemic.

## Change in all admissions by category

	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Total Average</b>	+1	+11	+42	+30	-65
<b>30% or less children (439)</b>	+2	+13	+45	+36	-67
<b>Over 30% children (151)</b>	-1	+6	+44	+29	-58

## Change in volume of child admissions

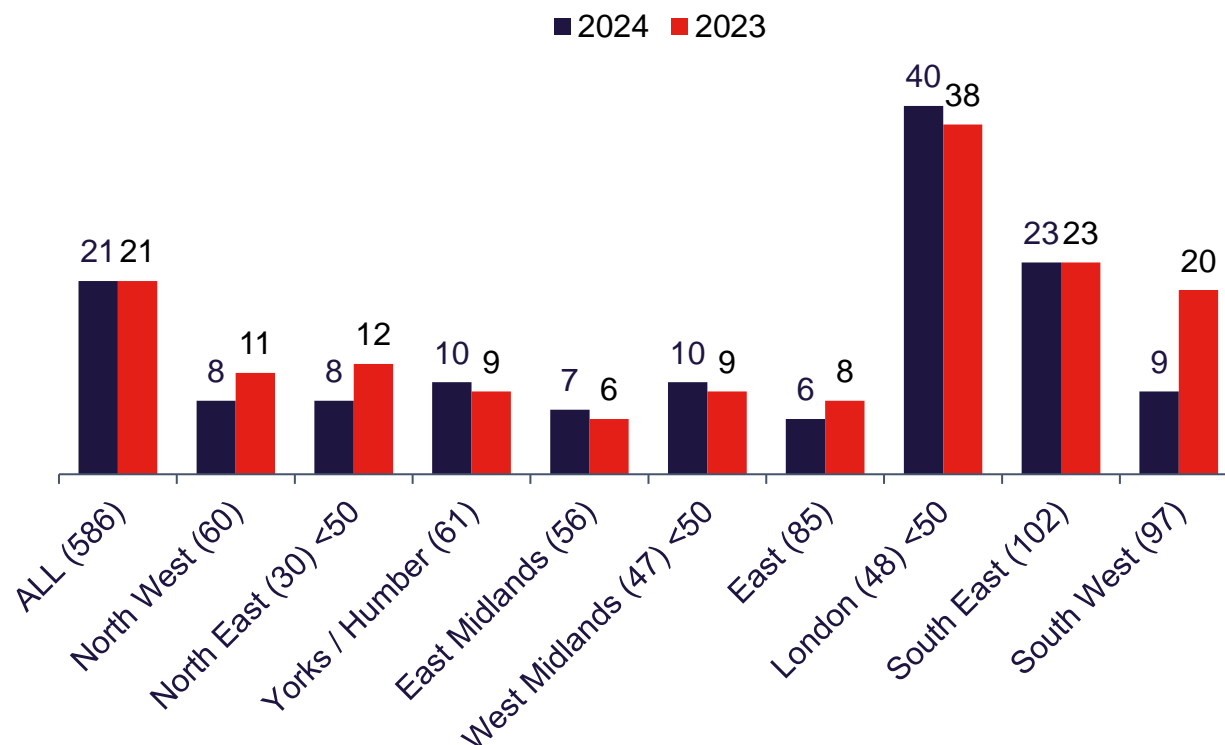
	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Child admissions (328)</b>	-2	+16	+25	+41	-61
<b>School children admissions (537)</b>	+5	+25	+204	+6	-84

# Visitor origin profile: 2024

The average share of visitors who come from overseas quoted by attractions is 21% - the same as reported for 2023 visits.

The proportion of visits accounted for by Overseas visitors is also broadly on a par with 2023 levels across regions, with the exception of the South West which returns to the lower levels reported in 2022 (10%).

## 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.

# Visitor Admission Trends 2024: By Visitor Origin

19% of sites reported a year on year increase in the number of overseas visitors to their site in 2024 and only 6% reported a decrease (inline with 2024's increased inbound tourism forecast\*).

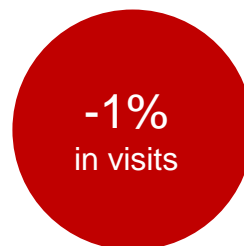
Just under half of these sites also provided proportion of visitors from overseas along with total admissions for 2023 and 2024 which allowed us to calculate volume and % change of overseas visitors in these years – **this showed an average increase of 6% in Overseas visitors.**

**Sites were less likely than last year to report an increase in volume of domestic visits (2024, 32%; 2023, 42%), however, with England domestic tourism day visits down 12% and overnight trips down 10% in 2024\*\*, attractions have done well to sustain volume of Domestic visits at the level they have (-1% 2023 vs. 2024)**

## Change in volume of visits from 2023 to 2024 [%]

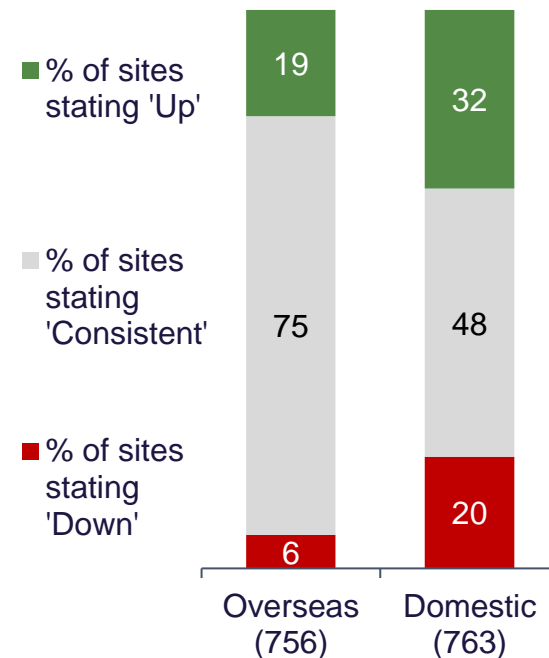


Overseas (334)



Domestic (334)

## Stated change in volume of visits from 2023 to 2024 [%]



Base: All providing % of overseas/ domestic 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.

SOURCES: \* VisitBritain model and forecasts for 2024/25. \*\*VisitEngland GBTS: 2024

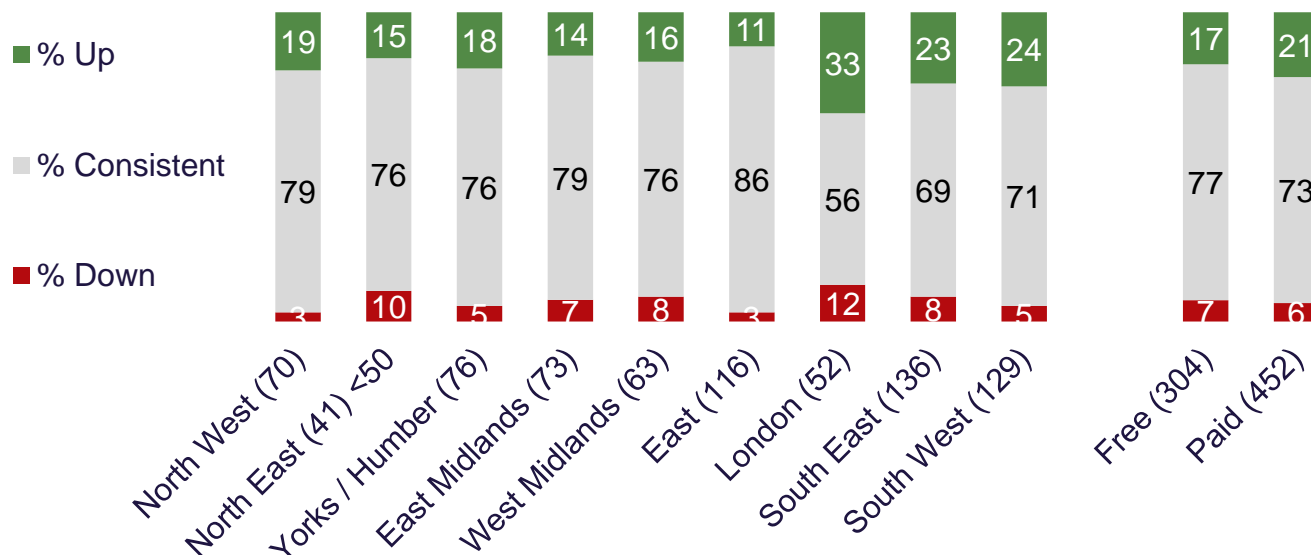
# Visitor Admission Trends 2024: Overseas Visitors by Region

For the majority of regions in 2024 sites mainly reported the volume of overseas visitors were 'consistent' with 2023 levels.

London stands out as the exception to this, where 33% of sites stated the volume of overseas visits had increased year on year.

Sites in the East of England and East Midlands were the least likely to report Overseas visitor volumes had increased.

2023/24 Stated change in volume of overseas visitors [%]



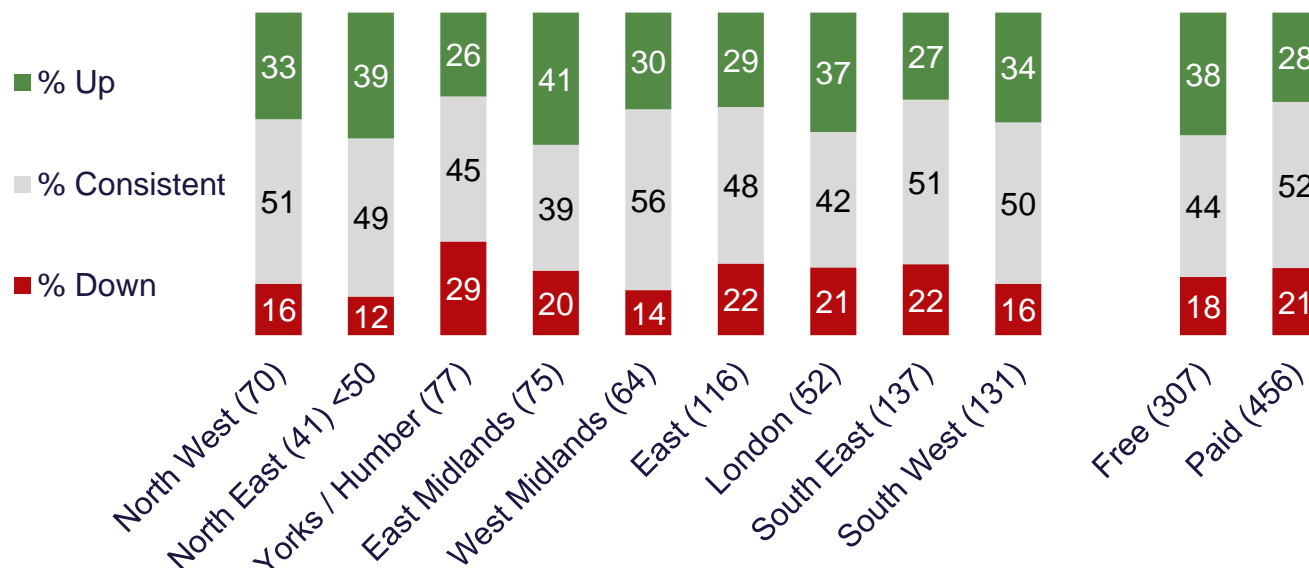
# Visitor Admission Trends 2024: Domestic Trip Visitors by Region

There was variation between regions in the extent attractions experienced a change in domestic visit volumes between 2023 and 2024.

We know from the Domestic Sentiment Tracker\* that a number of domestic consumers remained cautious in 2024 as a result of the cost of living crisis and this may have led to a prioritisation of day trips that affected some attractions more than others.

Free attractions have benefited, with a higher proportion, 38%, reporting an increase in domestic visits compared to 28% of charging sites, and the drop in overall domestic visit volume of -1% reported on slide 34 was driven by a decline at larger sites (with annual admissions exceeding 100k), and paid for sites.

2023/24 Stated change in volume of local / day trip visitors [%]



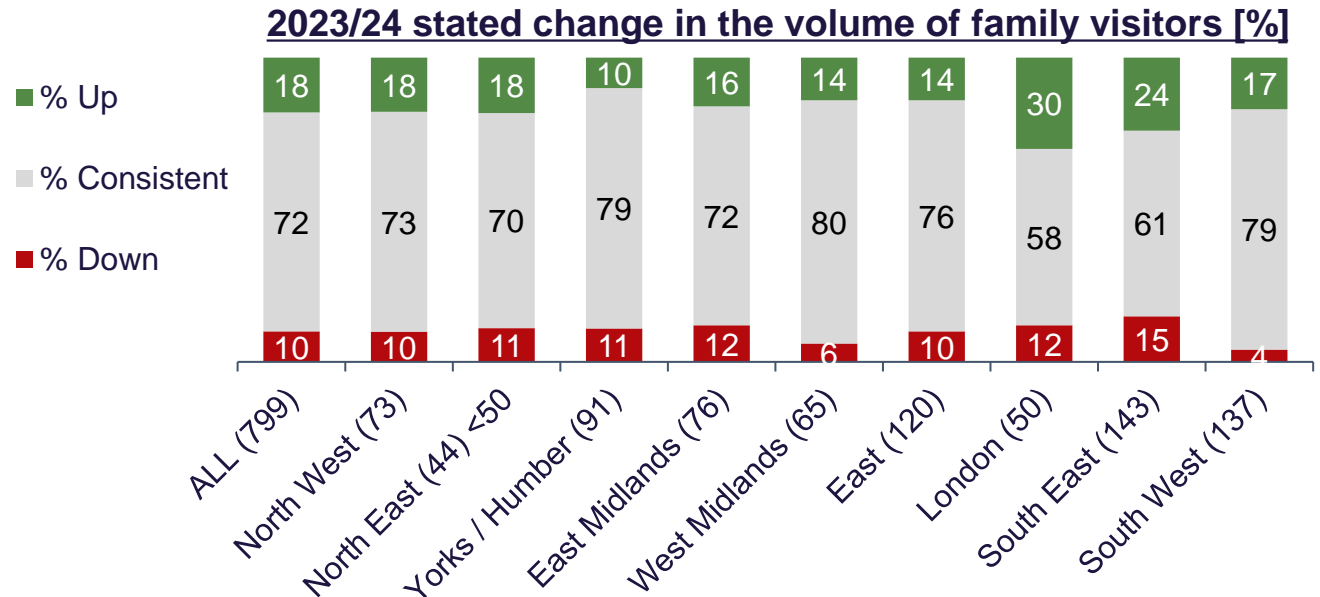
# Visitor Admission Trends 2024: Family Group Visitors by Region

In 2024, the mean share visiting in a family group was 35%, ranging between 29% to 39% across regions.

This share of visits is similar to levels seen in recent previous years.

The *volume* of family admissions increased slightly in 2024 in most regions – and particularly so in London, where 30% of attractions reported higher levels of family visits.

2024, % visiting in a family group (mean share)	35	36	38 (<50)	39	34	29	35	28 (<50)	35	35
2023, % visiting in a family group (mean share)	36	34	36	44	36	30	37	31	36	34



Base: All answering family group question (799)

Base: All stating the proportion of visits by families (759)

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 2024: Family Group Visitors by Attraction Category

Attractions naturally fall into three tiers of family engagement:

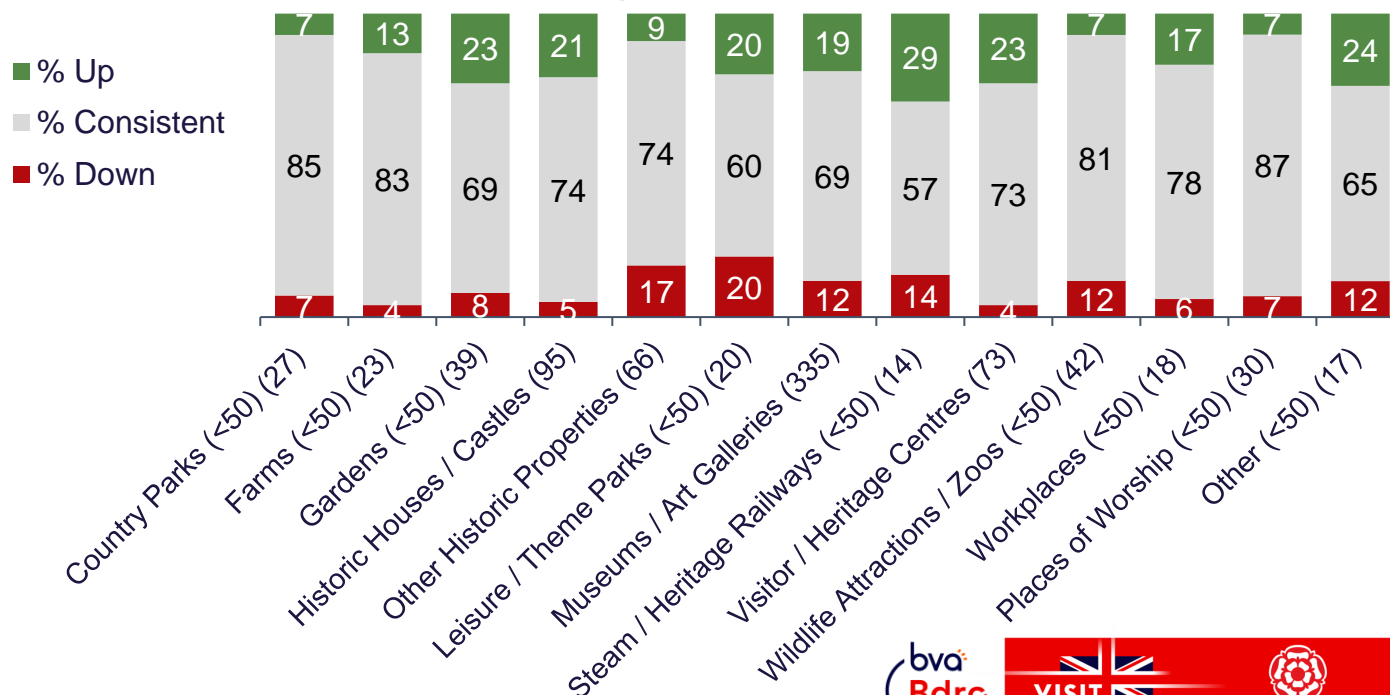
- **High:** Farms (81%) and Leisure/theme parks (76%)
- **Moderate:** Country Parks (55%), Steam/ Heritage railways (51%) and Wildlife attractions (51%)
- **Low:** All other types, with penetration of family groups falling at or below 35%

Compared to last year, there was an increase among some attraction types in the proportions reporting a decrease in family visits. For 'Other historic properties' and 'Wildlife attractions/zoos' more sites reported a decline in family visits, than saw an increase.

Steam/Heritage railway and 'other' attractions were most likely to report a growth in family visits, closely followed by 'visitor/heritage centres' and 'gardens'.

2024, % visiting in a family group (mean share)	55	81	27	28	28	76	32	51	28	51	9	22	35
	(<50)	(<50)	(<50)			(<50)		(<50)		(<50)	(<50)	(<50)	(<50)
2023, % visiting in a family group (mean share)	52	80	23	31	37	80	33	54	31	51	11	21	38
	(<50)	(<50)	(<50)			(<50)		(<50)		(<50)	(<50)	(<50)	(<50)

2023/24 stated change in the volume of family visitors [%]



Base: All answering family group question (799)

Base: All stating the proportion of visits by families (759)

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

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

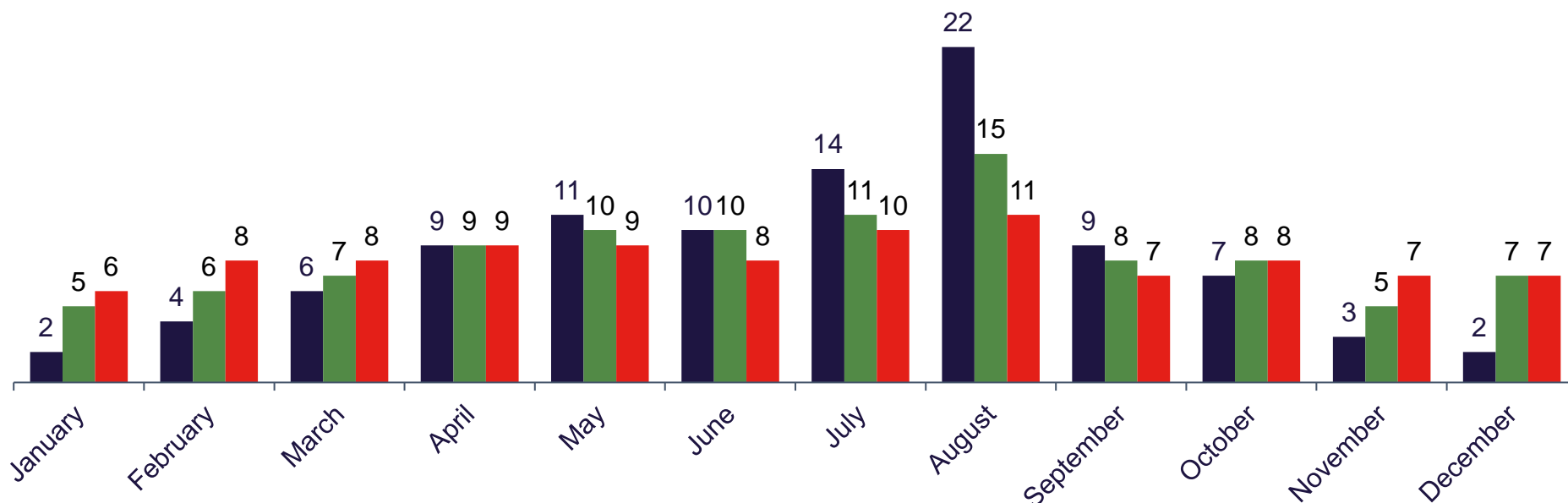


# Visitor Admission by Month

As we would expect, overall admissions are higher over the summer months, peaking in August. The performance of attractions based in coastal areas show the greatest seasonal variation with a particularly notable increase in August. Attractions in rural areas also show seasonal variation but to a slightly lesser degree than those in coastal areas, whereas visits to attractions in urban areas are more evenly spaced across the year.

## Proportional admissions across the year, by area type (%)

■ Coastal (94) ■ Rural (289) ■ Urban (303)





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

# Impact of rising energy costs

Just over two-thirds of attractions have been affected by rising energy costs, rising to 79% amongst charging sites, and 81% amongst sites with admissions above 100k per annum. These are similar to levels reported in 2023.

Sites have continued to find it difficult to absorb these costs: 28% of attractions in 2024 had to increase costs to visitors as a result (rising to 42% among charging sites) and just under half (45%) experienced reduced income.

It is fairly uncommon for sites to have reduced the services they offer as a result of rising energy costs, with only 6% of all attractions doing so.

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

%	2024 Overall (864)	2023 Overall (921)	Free (346)	Charge (518)	20K or less (402)	20K-100K (231)	Over 100K (207)
<b>Had to increase costs to visitors</b>	28	26	8	42	20	33	39
<b>Reduced income for site</b>	45	44	42	47	42	47	49
<b>Had to remove/ reduce certain services</b>	6	7	6	6	5	6	7
<b>No impact/ not relevant to site</b>	31	33	47	21	40	27	19
<b>% of affected sites increasing costs to visitors</b>	<b>41</b>	<b>39</b>	<b>14</b>	<b>52</b>	<b>33</b>	<b>45</b>	<b>48</b>

# Impact of rising staff costs

The proportion of attractions affected by rising staff costs has increased year on year (63% in 2024; 58% in 2023; 51% in 2022). It is a challenge that increases with attraction size and has a bigger impact on charging sites.

In 2024 the proportion of attractions reporting an impact on visitors because of rising staff costs increased compared to 2023: Increasing costs to visitors (32% vs.25% in 2023) and removal/reduction of services (11%, vs. 8% in 2023).

## Impact of rising staff costs by attraction charging and attraction size

%	2024 Overall (853)	2023 Overall (908)	Free (338)	Charge (515)	20K or less (385)	20K-100K (237)	Over 100K (209)
Had to increase costs to visitors	32	25	9	48	18	45	45
Reduced income for site	33	34	29	36	22	41	44
Had to remove/ reduce certain services	11	8	11	11	7	13	15
No impact/ not relevant to site	37	42	56	25	61	21	13
% of affected sites increasing costs to visitors	52	43	19	64	46	57	52

\*Question wording changed in 2024 to ask about 'rising staff costs', 2023 asked about 'rising wages'

Base: All answering impact of rising costs (853)

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

# Impact of rising supplier costs

Three-quarters of attractions were affected by rising supplier costs in 2024 and they were a particular problem for large sites, with around 9 in 10 of those attracting more than 100k visits a year affected by the increase in supplier prices.

In 2024 the proportion of attractions reporting a direct impact on visitors through increasing costs as a result of rising supplier costs increased compared to 2023: (39% vs.34% in 2023).

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

%	2024 Overall (856)	2023 Overall (914)	Free (337)	Charge (519)	20K or less (388)	20K-100K (236)	Over 100K (209)
Had to increase costs to visitors	39	34	20	52	25	50	53
Reduced income for site	42	40	39	45	39	43	48
Had to remove/ reduce certain services	9	10	8	10	7	10	11
No impact/ not relevant to site	24	29	39	14	38	14	9
% of affected sites increasing costs to visitors	51	48	32	60	41	58	58

Base: All answering impact of rising costs (856)

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

## **6. Admission charge & revenue trends**

# Adult Admission Charges 2024

**66% of English attractions charged an entry fee in 2024 – consistent with 2023 and 2022.**

**The average adult (high season) admission price in 2024 had increased to £12 from £11 in 2023.**

The proportion of charging attractions with an entry fee of less than £3 remained similar year on year at 6% (7% in 2023), but above this there was an upwards shift for the 2<sup>nd</sup> year running - the proportion charging £12 or more increased to nearly four in ten (39%) from 31% in 2023 and 25% in 2022.

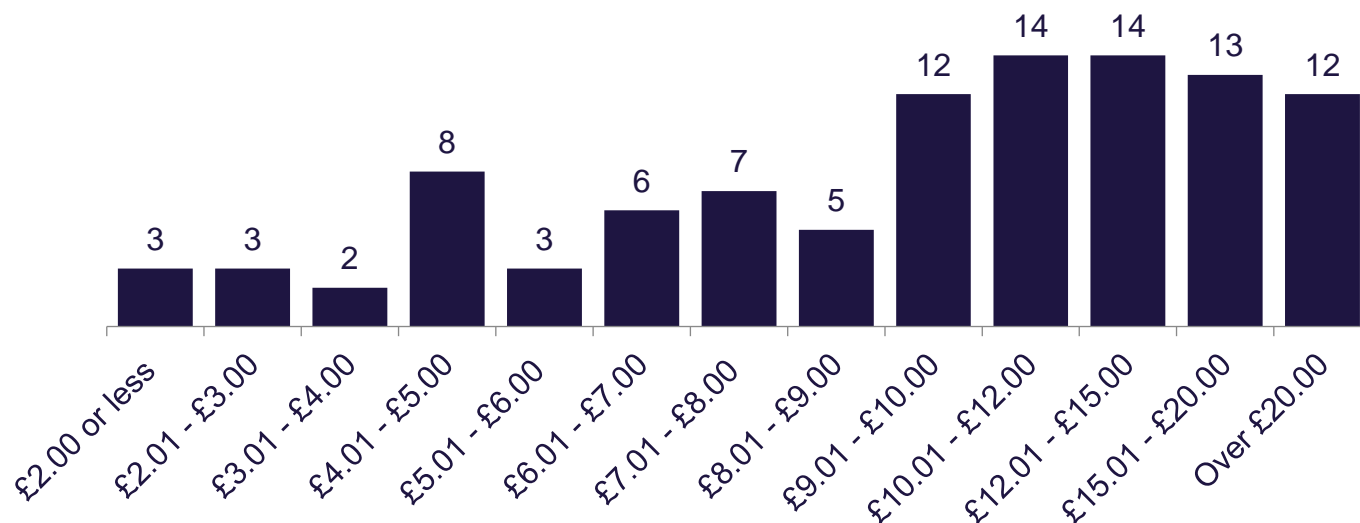
The proportion charging over £20 has also jumped in 2024 to 12% of attractions, from 7% in 2023 and 5% in 2022.



**66%**

**of English attractions charged for entry in 2024.**

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



# Adult Admission Charge Trends 2024: By Attraction Category

Adult peak season entrance prices rose by an average of 7% in 2024 – above the rate of inflation at the end of 2023 (4% based on the Consumer Price Index) when most prices would have been set.

Adult entrance fees increased across all attraction types, typically between 5-9%.

83% of charging attractions charged for child entry, similar to 2023 levels (82%)

In 2024 the average child entry price was £8.04, up from £7.17 in 2023. While still increasing, the inflation for child admission charges was a little lower than for adults at 6% on average.

## Change in adult admission charge: by attraction category

	Average 2024 charge	2023/24 change [%]	2022/23 change [%]
<b>ALL PAID ATTRACTIONS (615)</b>	£12.21	+7	+8
Country Parks <10	(<10)	(<10)	(<10)
Farms (17) <50	£11.54	+8	+5
Gardens (48) <50	£12.02	+9	+6
Historic Houses/Castles (173)	£13.56	+7	+9
Other Historic Properties (74)	£11.68	+6	+9
Leisure/Theme Parks (19) <50	£21.49	+4	+7
Museum/Art Galleries (166)	£9.13	+9	+8
Steam/Heritage Railways (15) <50	£12.20	+1	+10
Visitor/Heritage Centres (30) <50	£9.18	+5	+5
Wildlife Attractions/Zoos (40) <50	£16.43	+5	+3
Workplaces (10)	£19.95	+11	+7
Places of Worship <10	(<10)	(<10)	(<10)
Other (12) <50	£13.43	+9	+8

Base: All answering admission charge question in 2024 (615)

Base: All answering admission charge question in 2023 and 2024 (583)

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

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<10 Base size less than 10 (figure therefore omitted)



# Adult Admission Charge Trends 2024: By Region

The increase in entrance prices was fairly consistent across regions, with most increasing prices by 6-8%.

Average entrance fees in 2024 were lowest in the West Midlands, and highest in London, but, London was the region to report the smallest percentage change in admission fees year on year.

## Change in adult admission charge: by region

	Average 2024 charge	2023/24 change [%]	2022/23 change [%]
North West (54)	£11.31	+7	+7
North East (36) <sup>&lt;50</sup>	£11.44	+10	+6
Yorks / Humber (68)	£11.36	+7	+7
East Midlands (52)	£11.07	+7	+7
West Midlands (59)	£10.96	+8	+9
East (85)	£11.81	+6	+8
London (38) <sup>&lt;50</sup>	£17.21	+5	+8
South East (105)	£12.93	+6	+8
South West (118)	£12.48	+8	+8

Base: All answering admission charge question in 2024 (615)

Base: All answering admission charge question in 2023 and 2024 (583)

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 2024: 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.

The average entrance fee for small attractions, with 20,000 visits or less is £8.47 and this rises to £18.74 amongst attractions with over 100,000 visitors a year.

Price inflation was broadly similar across attraction size and area type.

## Change in adult admission charge: by attraction size

	Average 2024 charge	2023/24 change [%]	2022/23 change [%]
<b>20,000 or less p.a. (251)</b>	£8.47	+8	+9
<b>20,001 – 50,000 p.a. (131)</b>	£10.91	+7	+5
<b>50,001 – 100,000 p.a. (66)</b>	£13.41	+6	+8
<b>Over 100,000 p.a. (157)</b>	£18.74	+7	+8

## Change in adult admission charge: by area type

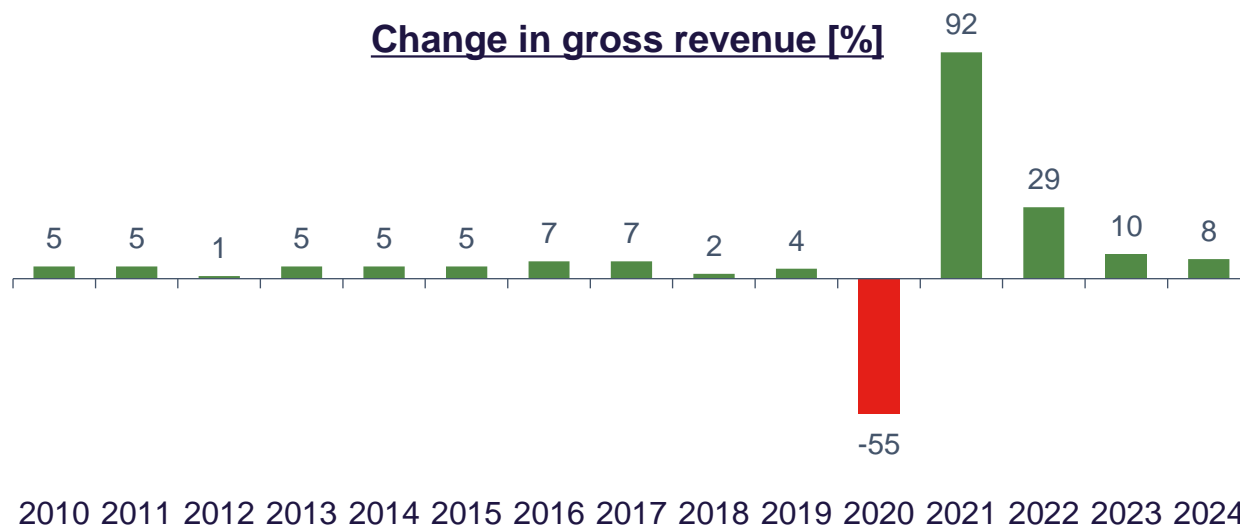
	Average 2024 charge	2023/24 change [%]	2022/23 change [%]
<b>Coastal (88)</b>	£11.53	+6	+7
<b>Rural (334)</b>	£12.52	+7	+7
<b>Urban (193)</b>	£11.97	+7	+9

# Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions increased by 8% in 2024.

This is lower than in recent years post-pandemic, but remains above the rate of inflation, which ranged from 4% (Jan 2024) to 2.5% (Dec 2024) for the Consumer Price Index.

Growth in revenue was fuelled by higher entrance prices (at charging attractions).



# Gross Revenue Index Trend

In the same way that the volume of visits to attractions is indexed on pages 25-26, we have used an index to show the gross revenue trend.

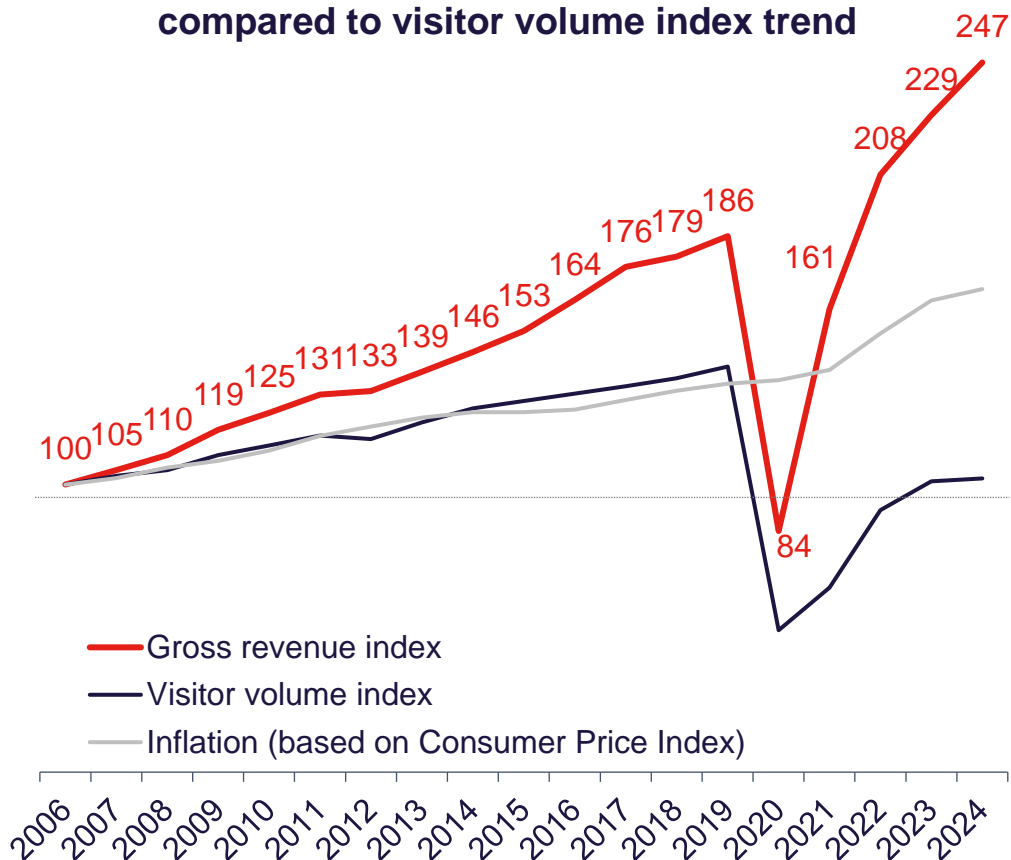
In this chart the **base year for both indexes is 2006, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. gross revenue increased by 5% between 2006 and 2007, increasing the index for 2007 to 105.

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 has recovered more quickly than visitor admissions, and is now on an even stronger growth trajectory than before the pandemic. Above inflationary increases in admission fees will be contributing to this.

The increase in staff wages, energy bills, supplier costs etc. during 2023-24 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



# Gross Revenue Trend 2024: By Attraction Category

All attraction categories reported annual growth in gross revenue, but there was a range in the extent of this increase (+1 to +11%).

Some increases this year may be 'catch up' from smaller, or even negative changes last year but there are number of attractions that have seen continued year on year growth, this includes 'Museums/ Art Galleries'; 'Other Historic Properties'; 'Visitor/ Heritage Centres'; 'Farms'.

*Please note small base sizes for many categories.*

## Average % change in gross revenue

	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Country Parks (22) <sup>&lt;50</sup>	+10	-2	+2	+14	-26
Farms (22) <sup>&lt;50</sup>	+8	+16	+20	+52	-38
Gardens (42) <sup>&lt;50</sup>	+5	+6	+8	+167	-44
<b>Historic Houses / Castles (102)</b>	+3	+10	+21	+123	-58
<b>Other Historic Properties (65)</b>	+6	+17	+46	+114	-63
Leisure / Theme Parks (20) <sup>&lt;50</sup>	+1	-2	+2	+90	(<10)
<b>Museums / Art Galleries (333)</b>	+11	+13	+39	+67	-55
Steam/Railways (14) <sup>&lt;50</sup>	+2	+10	+21	+103	-63
<b>Visitor / Heritage Centres (68)</b>	+5	+5	+34	+156	-65
Wildlife Attractions / Zoos (42) <sup>&lt;50</sup>	+3	+5	+15	+45	-36
Workplaces (18) <sup>&lt;50</sup>	+9	-1	+60	+45	-60
Places of Worship (28) <sup>&lt;50</sup>	+7	+11	+36	+84	-60
Other (19) <sup>&lt;50</sup>	+9	+4	+59	+50	-69

# Gross Revenue Trend 2024: By Region

Gross revenue increased across the country with all regions reporting at least a +4% increase compared to 2023.

The South West (+16%) and London(+12%) recorded the highest levels of growth.

## Average % change in gross revenue

	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>North West (77)</b>	+4	+12	+22	+135	-60
North East (38) <sup>&lt;50</sup>	+4	+6	+27	+65	-56
<b>Yorks / Humber (89)</b>	+5	+5	+23	+76	-35
<b>East Midlands (76)</b>	+5	+7	+25	+74	-59
<b>West Midlands (75)</b>	+10	+13	+26	+77	-58
<b>East (124)</b>	+4	+10	+25	+72	-51
London (42) <sup>&lt;50</sup>	+12	+24	+72	+97	-67
<b>South East (143)</b>	+6	+12	+33	+61	-59
<b>South West (131)</b>	+16	+10	+29	+148	-53

# Gross Revenue Trend 2024: By Admission Charge & Attraction Size

For the first time since 2019/20, in 2024 'Paid' and 'Free' sites report broadly the same annual % change in gross revenue (+8% and +7% respectively).

Mid-large sized attractions, with 50k-100k visits per annum, reported the highest increase in gross revenue in 2024, whilst it was the larger attractions, with over 100k visit per annum, that reported the smallest revenue growth (+6%).

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

	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Free (324)</b>	+7	+7	+24	+68	-54
<b>Paid (471)</b>	+8	+12	+32	+105	-55

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

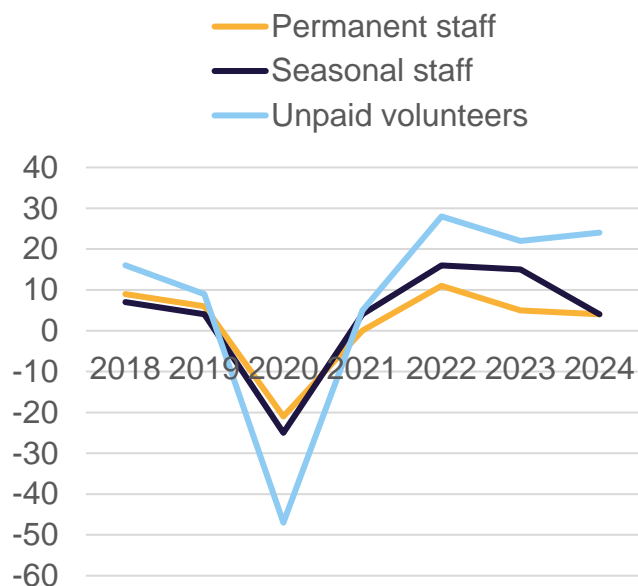
	2023/24 change [%]	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
<b>Up to 20k p.a. (377)</b>	+8	+11	+35	+100	-60
<b>20k – 50k p.a. (130)</b>	+7	+9	+29	+118	-56
<b>50k – 100k p.a. (81)</b>	+12	+9	+22	+93	-54
<b>Over 100k p.a. (187)</b>	+6	+13	+22	+56	-45

## **7. Employment trends**

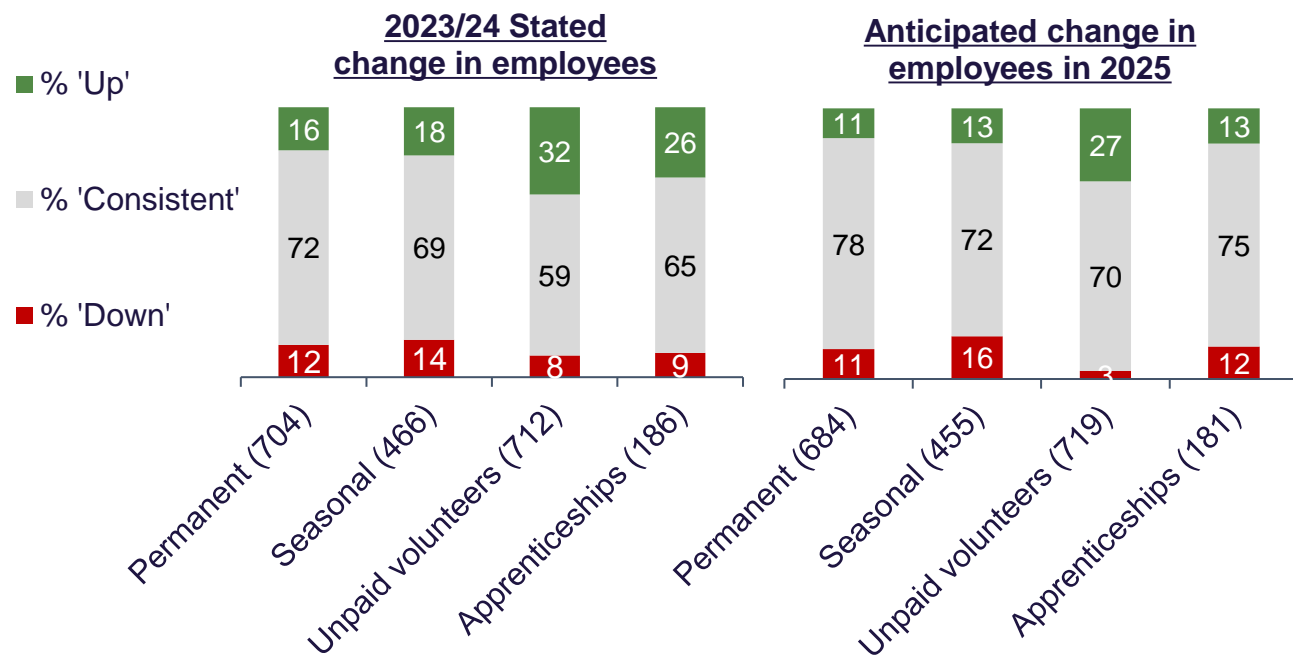
# Overall Employment Trends

There were 'Net' year on year increases in all types of staff working at England attractions in 2024. Unpaid volunteers saw the biggest increase (Net:+24%), followed by Apprenticeships (Net:+17%). Looking ahead to 2025, the expectation is for further growth of volunteer workers, but no change in numbers of permanent staff and little change for apprenticeships. A small overall reduction in seasonal workers is also anticipated.

**NET change in staffing**  
(% increase 'minus' % decrease)



NET change (up 'minus' down)	+4%	+4%	+24%	+17%	0%	-3%	+24%	1%
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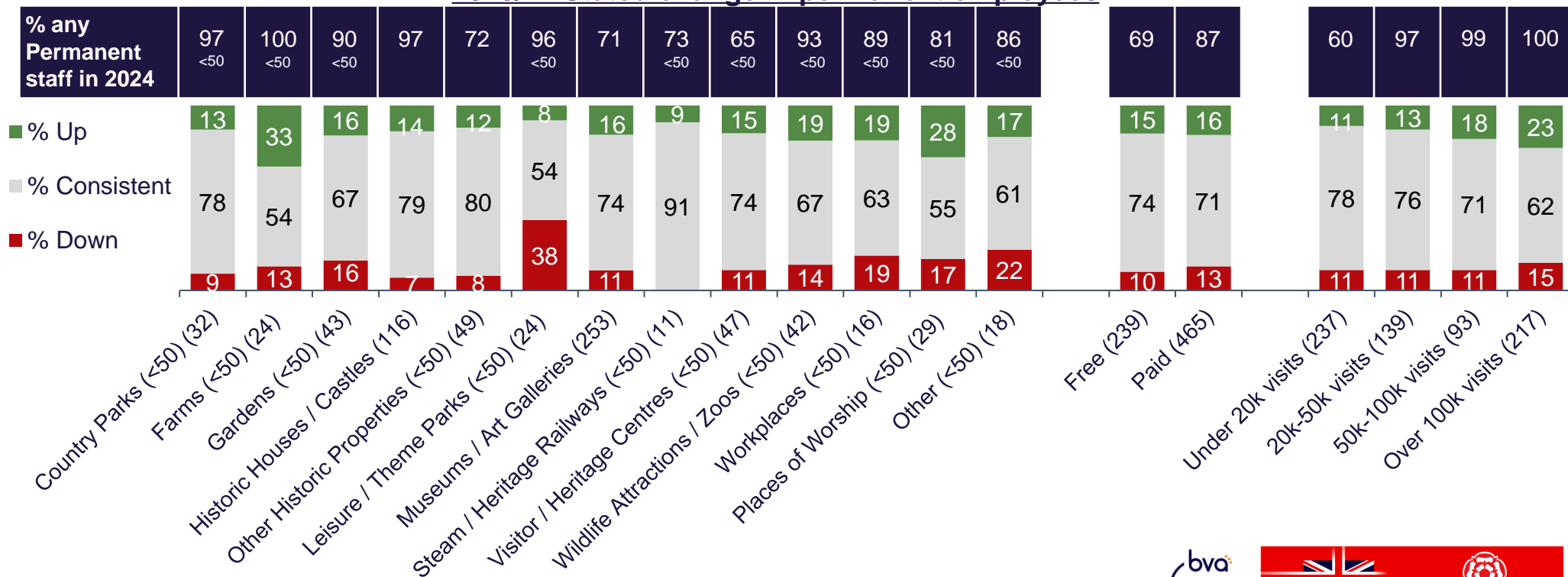


# Permanent Employees: 2023 – 2024 trends

**80% of attractions employed permanent staff members in 2024 (the same proportion as 2023).** ‘Visitor/ Heritage Centres’ (65%) ‘Museums/ Art Galleries’ (71%), ‘Other historic properties’ (72%) and ‘Steam/Heritage Railways’ (73%), along with ‘Free entry attractions’ and ‘Sites with fewer than 20k visits per year’ all reported permanent employee levels below the average.

Looking at year on year net changes in permanent staffing levels (% increasing ‘minus’ % decreasing), Farms and Places of Worship reported net increases above 10%, whilst Leisure/ Theme parks reported a net decrease (though please note the small base sizes for these categories). Likelihood to have increased permanent staff levels increased with attraction size.

**2023/24 Stated change in permanent employees**



Base: Table: All answering employment questions (882): Chart: All with employees of this type  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

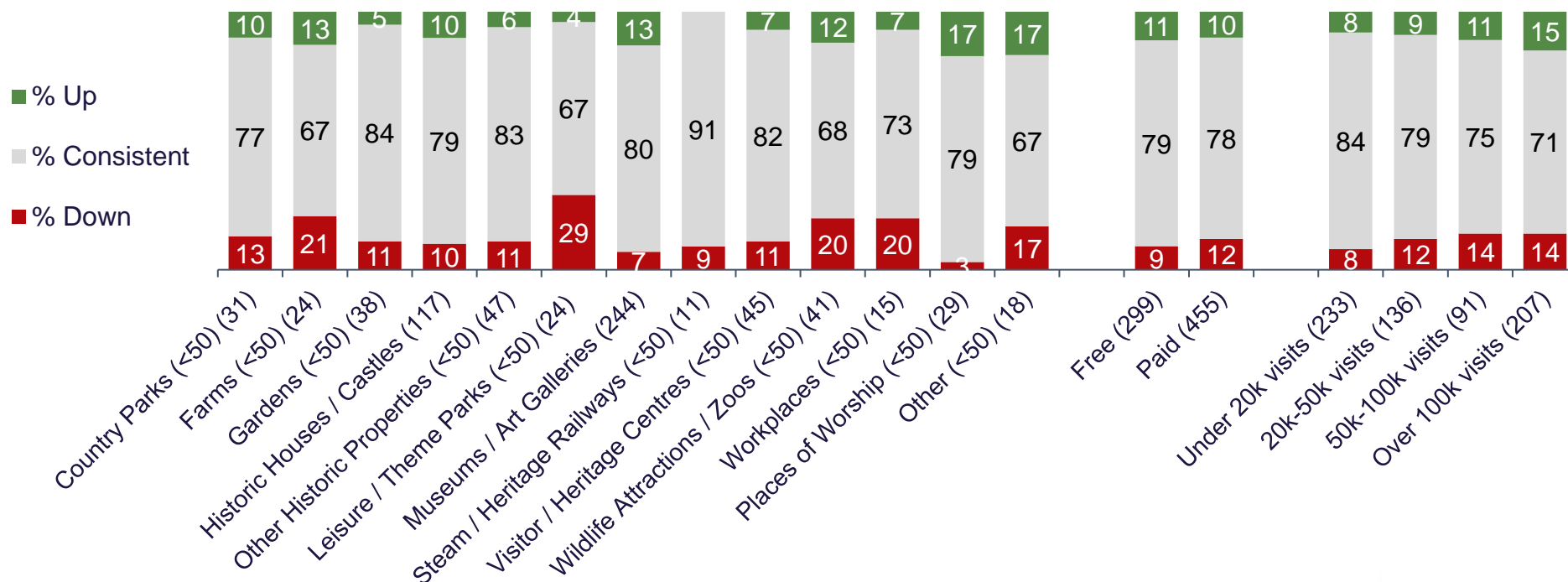
# Permanent Employees: 2025 Predictions

When looking ahead to 2025, the majority of attractions are expecting permanent staff levels to be similar to those in 2024.

Polarisation within attraction categories means expectations permanent employee levels will increase in 2025 for some sites are, to varying degrees, offset by other sites anticipated reductions.

Leisure / Theme parks anticipate a net decrease (% up 'minus' % 'down') of 25%.

## Anticipated change in permanent employees in 2025



Base: All with employees of this type

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

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



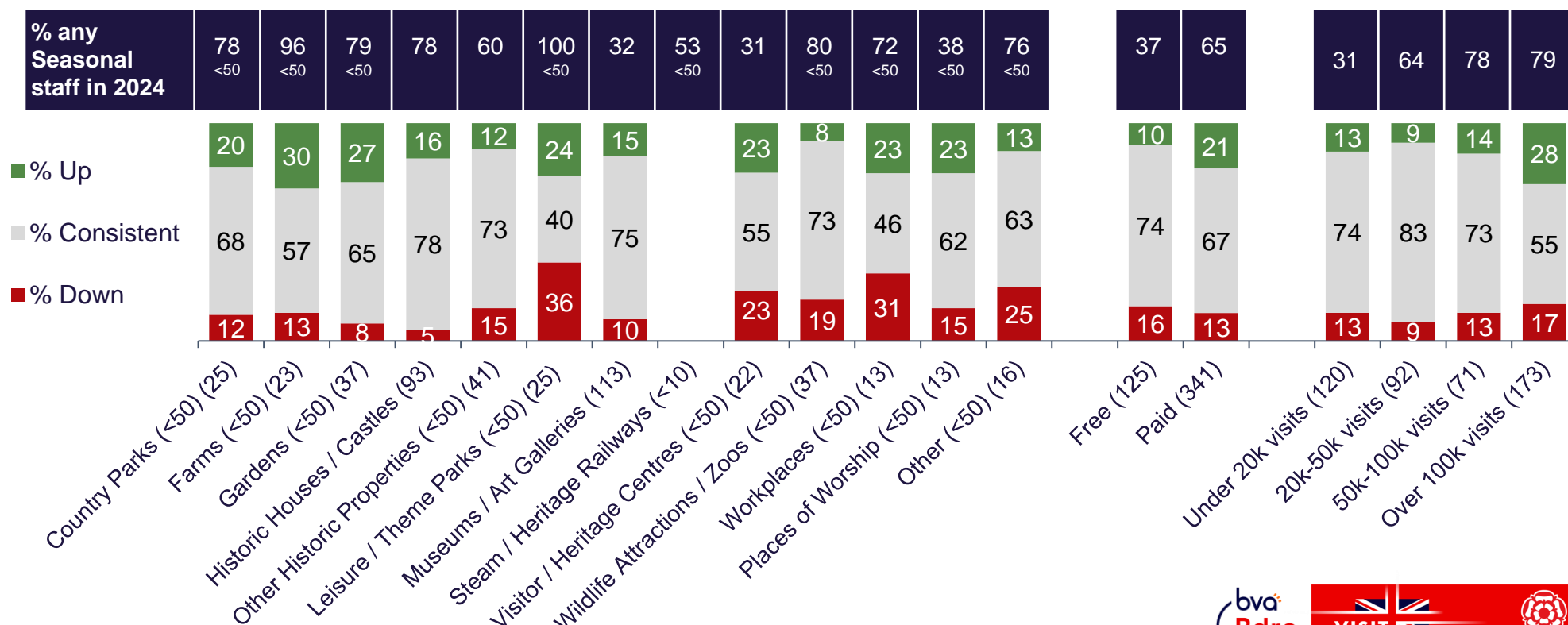
# Seasonal Employees: 2023 – 2024 trends

Proportions who employed 'any' seasonal staff in 2024 varied considerably by attraction category (e.g. 31% of Visitor/ heritage centres but 100% of Leisure/ Theme parks). Also, lower proportions of 'free' and 'smaller sites' (<20k annual visits) used seasonal staff.

While several attraction categories reported increased or maintained seasonal staffing levels, there were some that reported an overall net: decrease: including 'Other Historic Properties'; 'Leisure/ Theme Parks', 'Wildlife Attractions/ Zoos'.

Free attractions also reported an overall net: decrease in seasonal staffing levels, in contrast to paid attractions which reported a net increase. Attractions with over 100k visits per year reported a greater net: increase in seasonal staff compared to smaller attractions.

## 2023/24 Stated change in seasonal employees



Base: Table: All answering employment questions (868). Chart: All with employees of this type (<50) Base size below 50 (please treat with caution)  
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based. (<10) Base size below 10 (data not shown)

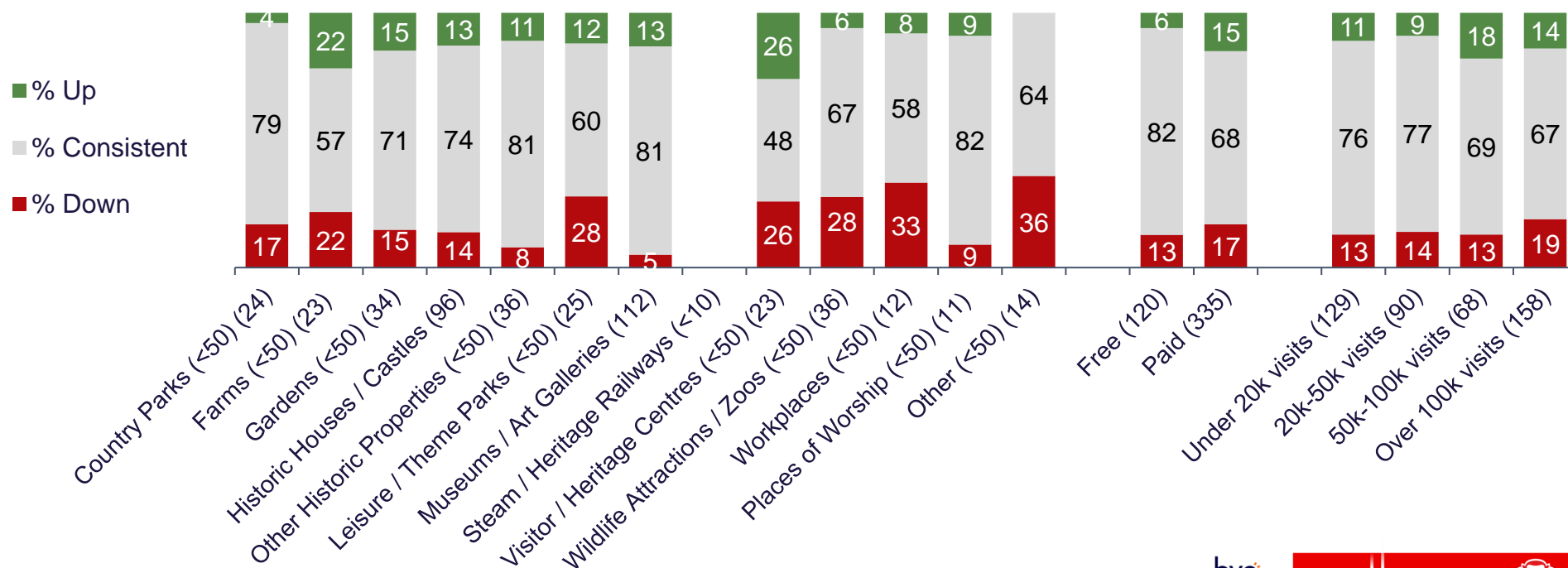
# Seasonal Employees: 2025 Predictions

When looking ahead to 2025 there are notable proportions across attraction categories anticipating a reduction in seasonal employees, in most cases matching or outweighing any anticipated increases, creating a negative net impact for seasonal employment levels.

A few exceptions to this, predicting a net increase (% up 'minus' % 'down'), are:

Museums/ Art Galleries, predicting a net increase of +8%; 'Other Historic Properties', predicting a net increase of +3%; and mid size attractions (50-100k visits per year) predicting a net increase of +5%.

## Anticipated change in seasonal employees in 2025



Base: All with employees of this type

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)

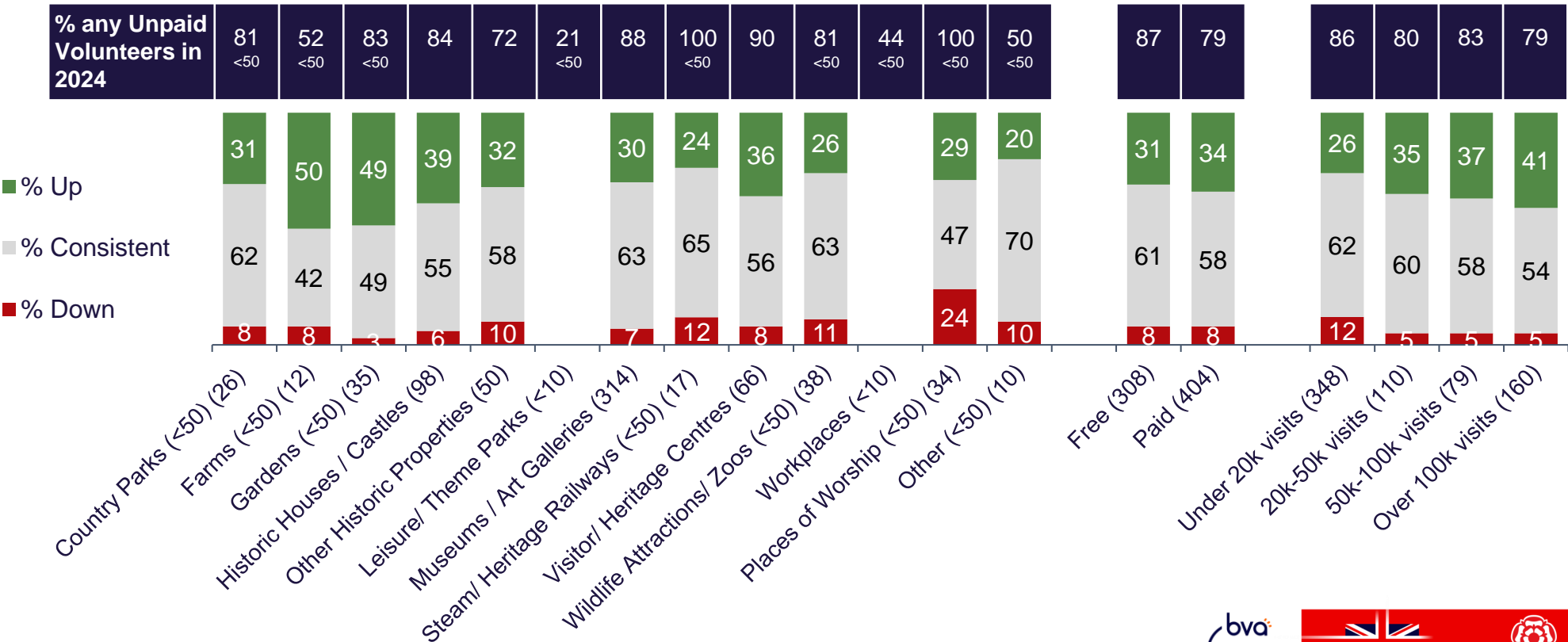


# Unpaid Volunteers: 2023 – 2024 trends

Unpaid volunteers are essential to the running of many attraction categories with 82% of all attractions utilising their input in 2024. Among ‘free’ and ‘smaller attractions (<20k annual visits)’ above average proportions used volunteers, while Leisure/ Theme parks and workplaces stand out as exceptions with much lower proportions using.

2024 saw net growth in volunteers (% up minus % down) across all attraction categories, sizes and charging types, with a particularly notable net increase of +46% at ‘Gardens’.

2023/24 Stated change in unpaid volunteers



Base: Table: All answering employment questions (868): 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)

60

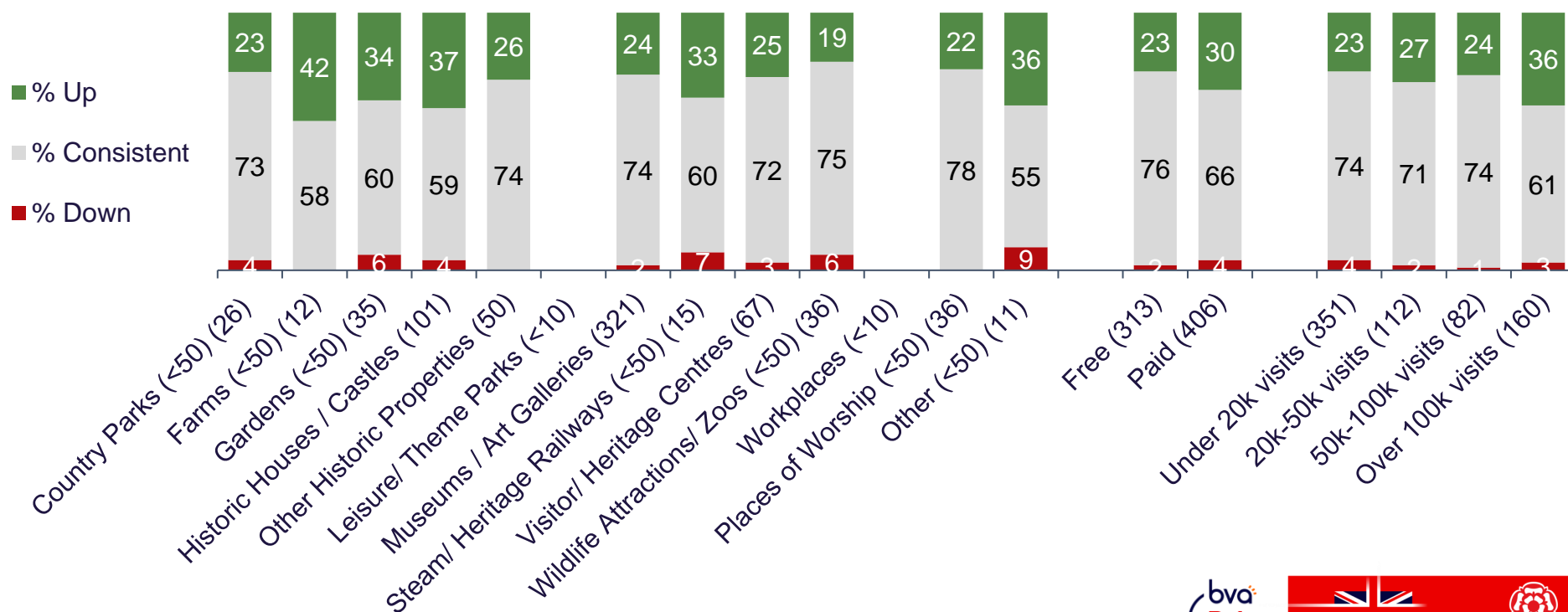
# Unpaid Volunteers: 2025 Predictions

The number of unpaid volunteers is expected to increase across the board in 2025, with overall net change (% up 'minus' % down) of +24% (unlike for permanent staff with levels predicted to remain fixed or seasonal staff, predicted to reduce).

The trend for increasing levels of unpaid volunteers can be seen across all attraction categories, sizes and charging types.

It is particularly strong for 'Historic houses/ castles' and Larger attractions (over 100k visits), but slightly weaker among 'Country parks', 'Wildlife attractions / zoos' and smaller attractions (<20k annual visits).

## Anticipated change in unpaid volunteers in 2025



Base: All with employees of this type

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)

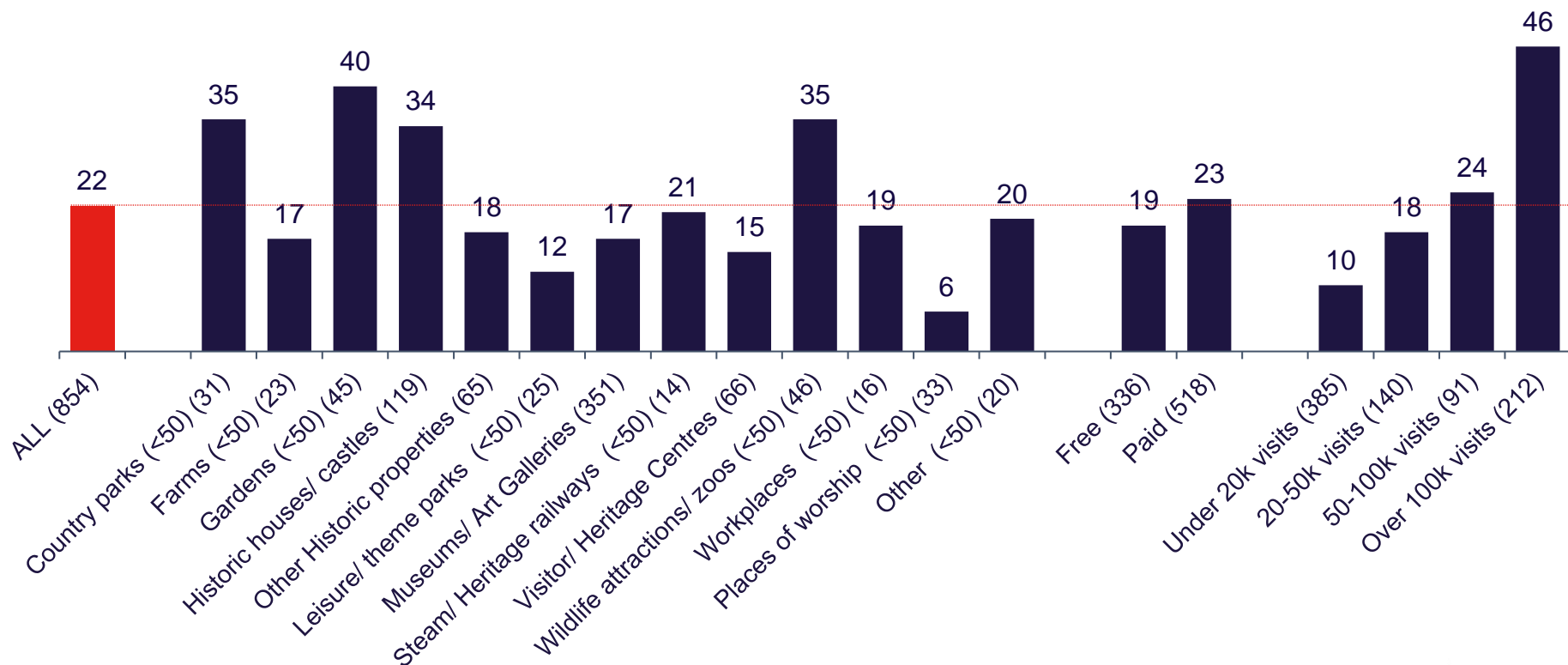


# Apprenticeships

## 22% of attractions employed apprentices in 2024.

This becomes more common as the volume of admissions increases, with 46% of sites with over 100,000 visits a year employing apprentices (a pattern also observed in 2023).

### % employing any apprentices in 2024



Base: Table: All answering employment questions (854)  
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

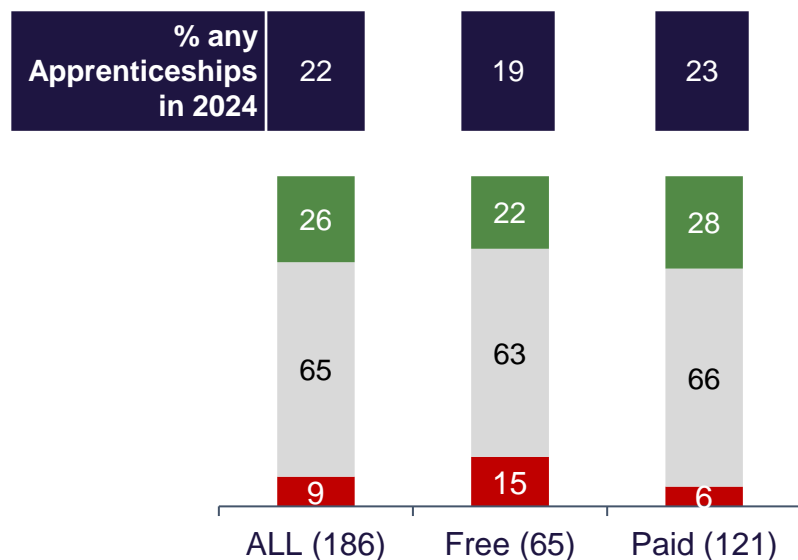


# Apprenticeships: 2023-2024 Trends & 2025 Predictions

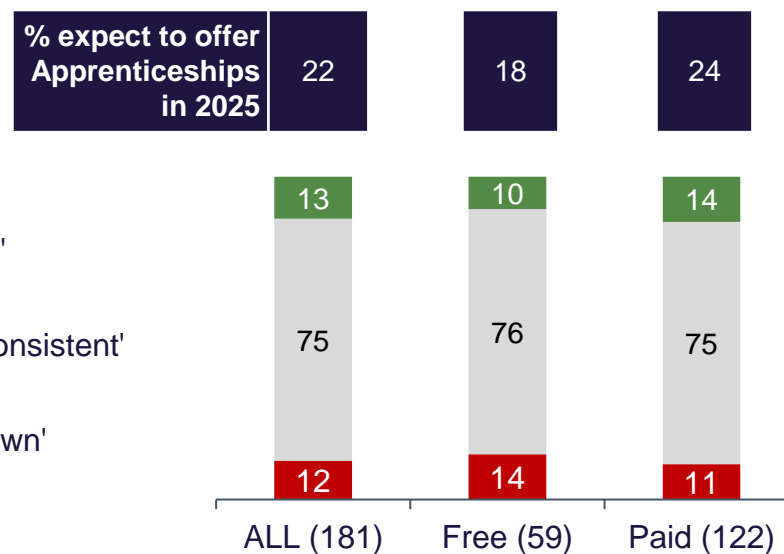
The number of sites offering apprenticeships in 2025 is expected to remain at a similar proportion to 2024 (22%).

Predictions also indicate the number of apprenticeships available will be similar overall, though as with the trend in 2024 vs 2023 there is likely to be slightly more opportunities among charging sites than free sites.

## % 2023/24 Stated change in apprentices



## % 2025 anticipated change in apprentices



■ % 'Up'  
■ % 'Consistent'  
■ % 'Down'

# Staff recruitment and recruitment challenges in 2024

There were some challenges in recruiting the right people for the roles at attractions in 2024. The primary impact of recruitment challenges were for existing staff members, but there were some reports of impact through reduced services for visitors too.



## 66%

of sites engaged in staff recruitment – either to replace or supplement their existing staffing in 2024.



## 43%

of sites that engaged in recruitment, experienced difficulties in recruiting the right people for the role(s) in 2024.

### Impact of the recruitment challenges on attraction

<i>Impact if experienced any difficulty recruiting the right people....</i>	2024
<b>NET: Any Impact</b>	<b>86%</b>
Strain on existing staff members	80%
Not possible to complete planned work/ developments	30%
Reduction in exhibits/activities available to visitors	18%
Longer wait times	16%
Reduced opening hours	13%
Other	7%

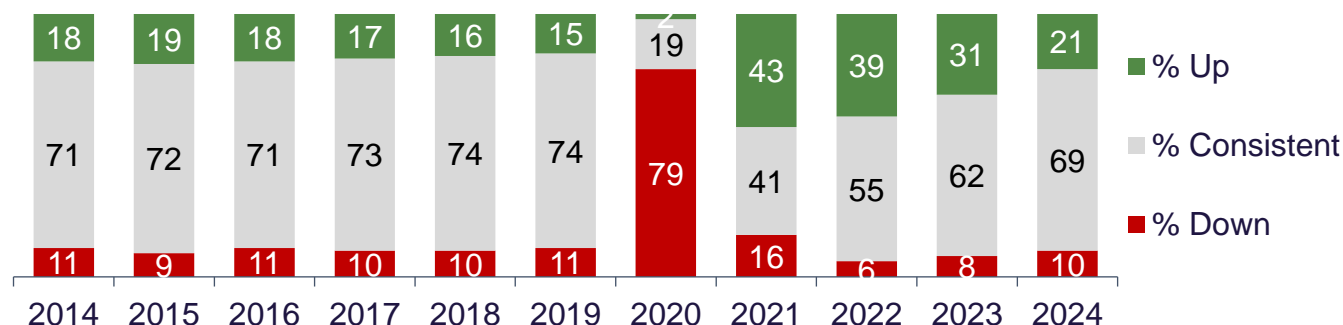
## **8. Marketing & communications trends**

# Marketing Expenditure Trend

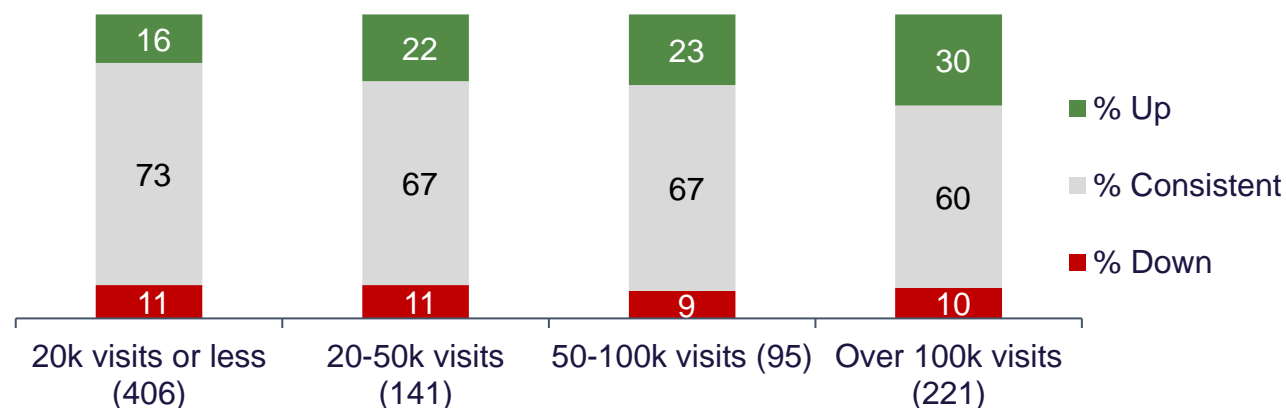
Likelihood of attractions reporting marketing spend was up in 2024 (compared to 2023) is lower than in other post-pandemic years. However, 2 in 10 attractions still report an increased marketing spend for 2024, compared to only 1 in 10 reporting marketing spend had gone down.

Likelihood to have increased marketing expenditure in 2024 increased with attraction size: 3 in 10 larger attractions, with >100k visits per year, reported marketing spend was up in 2024 compared to 2023.

## Trend in marketing expenditure



## Trend in marketing expenditure by size of attraction

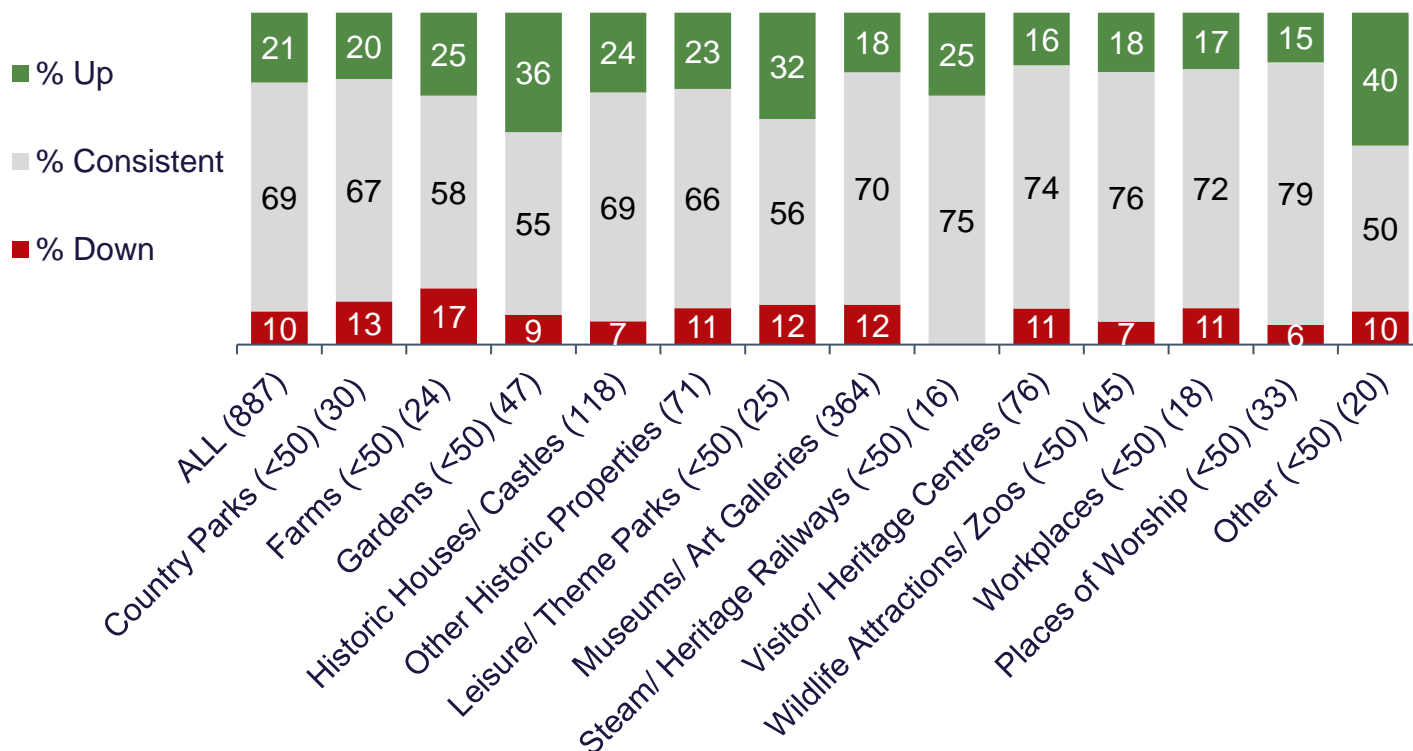


# Marketing Expenditure Trends 2024: By Attraction Category

There was variation among attraction categories in the proportion of sites who reported their marketing spend was up in 2024 compared to 2023.

Reports of increased year on year marketing spend were particularly notable in 2024 for 'Gardens', 'Leisure/Theme parks' and 'Other' attractions (such as piers or sports stand tours).

Trend in marketing expenditure by attraction category



Base: All answering marketing question (887)

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 2024: By Region & Admission Charge

There was also variation by region in the proportion of sites reporting their marketing spend had increased in 2024 compared to 2023.

Proportions of attractions saying 2024 marketing spend was up year on year was above the average in the 'South West'; 'South East' and 'London'.

Attractions in 'West Midlands', 'East Midlands' and 'Yorkshire & Humber' reported the highest levels of all regions marketing budgets decreased in 2024.

In 2024, the difference between proportions of paid vs. free attractions reporting increased marketing budget was smaller than in both 2023 and 2022 (when paid attractions were notably more likely than free attractions to report increases to their marketing budgets).

Trend in marketing expenditure by region and admission charge



# Digital Communications Offered

**Use of digital communications continues to be high. 94% of visitor attractions used some form of digital media in 2024.**

Facebook continues to be the most commonly utilised (90%), followed by Instagram (71%) and E-newsletters (59%).

Use of X (formerly Twitter) has declined again in 2024 (40% in 2024, compared to 62% in 2022).

Typically, usage of digital communication platforms correlates positively with increasing attraction size. The main difference is between small attractions (<20k visitors per year) who have lower usage than those with a higher visit volumes (20k+ visits per year).

'Online booking' is offered by 57% of all attractions (up on 55% in 2023), and availability increases with attraction size.

## Digital communication channels trend

	% offered in 2024	% offered in 2023	% offered in 2022	% offered in 2021	% offered in 2020
<b>ANY Social/apps</b>	<b>94</b>	<b>95</b>	<b>94</b>	<b>92</b>	<b>90</b>
Facebook page	90	91	90	89	88
Instagram*	71	68	61	62	60
E-newsletter	59	58	53	55	51
X/ Twitter	40	55	62	61	64
YouTube	32	38	34	39	41
TikTok	16	22	24	NA	NA
Other social media	12	23	25	31	25
Mobile apps	8	16	18	19	18

**% Offering "Online booking facility": 2024 (57%) 2023 (55%)**

## Digital Communication channels by attraction size

% offered	20k or less (421)	20k-50k (146)	50k-100k (97)	Over 100k (234)
<b>ANY Social/ apps</b>	<b>92</b>	<b>96</b>	<b>97</b>	<b>99</b>
Facebook page	86	92	97	97
Instagram*	53	82	87	92
E-newsletter	45	66	70	79
X/ Twitter	26	47	44	59
YouTube	19	35	40	54
TikTok	5	12	22	38
Other social media	9	11	12	18
Mobile apps	4	7	7	19
Online booking facility	38%	66%	70%	80%

\* In 2023 survey and earlier = "Instagram/Pinterest"

Base: All answering digital communications question (926)

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

# Digital Communications Offered in 2024: By Attraction Category

While Facebook is most used across the board, use of other social media varies between attraction categories. 'Historic houses/ castles' (driven by large membership organisations), 'Gardens' and 'Leisure/ Theme Parks' employ the broadest spread of digital communications.

## Digital communication channels offered by attractions category

% offered	Country Parks ( <sup>&lt;50</sup> ) (33)	Farms ( <sup>&lt;50</sup> ) (24)	Gardens (51)	Historic houses / castles (123)	Other historic (71)	Leisure / theme parks ( <sup>&lt;50</sup> ) (25)	Museum / art galleries (385)	Steam / heritage railways ( <sup>&lt;50</sup> ) (17)	Visitor / heritage centres (76)	Wildlife / zoos ( <sup>&lt;50</sup> ) (46)	Work- places ( <sup>&lt;50</sup> ) (18)	Places of Worship ( <sup>&lt;50</sup> ) (36)	Other ( <sup>&lt;50</sup> ) (21)
<b>ANY Social/ apps</b>	<b>91</b>	<b>100</b>	<b>98</b>	<b>97</b>	<b>90</b>	<b>100</b>	<b>95</b>	<b>94</b>	<b>87</b>	<b>100</b>	<b>94</b>	<b>92</b>	<b>90</b>
Facebook	91	100	88	93	82	96	92	94	84	100	89	83	86
Instagram*	70	96	86	89	56	88	66	65	53	76	83	64	81
E-newsletter	52	71	65	63	49	68	61	47	51	52	72	61	43
X/ Twitter	30	25	35	41	30	52	44	18	29	52	28	44	33
YouTube	9	29	31	28	24	56	39	35	24	28	28	39	19
TikTok	3	38	22	15	8	60	14	24	7	35	11	17	24
Other social media	3	8	8	7	8	8	16	-	9	9	6	22	14
Mobile apps	3	17	18	11	8	28	5	12	5	13	-	6	10
<b>% Offering online booking facility</b>	<b>58</b>	<b>67</b>	<b>65</b>	<b>64</b>	<b>54</b>	<b>84</b>	<b>49</b>	<b>71</b>	<b>42</b>	<b>78</b>	<b>78</b>	<b>53</b>	<b>71</b>

Base: All answering digital communications question (926)

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)

\* In '2023 visits' survey and earlier = "Instagram/Pinterest"



## 9. Sustainability

# Regenerative tourism /sustainable practices: Overall, by Region and by Area Type

In terms of the broader impact of their organisation, 77% of attractions report having one or more strategies in place to embed regenerative tourism / sustainable practices.

Having an 'Environmental Strategy' is the most likely (61%), but also 'social' and 'governance' strategies are each in place at around half of attractions.

Attractions in London and the North (*North West, North East, Yorkshire & Humber*) are the most likely to have strategies in place to embed regenerative tourism / sustainable practice(s).

## Regenerative tourism/sustainable practices [%]



## Formal prioritisation of sustainability, by region and admission type [%]

[%]	North West <50 (33)	North East <50 (31)	Yorks / Humber (55)	East Midlands (51)	West Midlands (52)	East (82)	London <50 (26)	South East (99)	South West (86)	Free (212)	Charge (303)
Environmental strategy*	64	71	80	55	60	51	62	60	62	57	64
Social strategy*	61	65	65	55	42	56	62	45	57	61	50
Governance strategy*	61	61	62	49	52	39	58	43	45	52	48
No regenerative tourism/sustainable practices	12	13	11	31	31	30	15	23	23	24	22

Base: All answering sustainability question (515)

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

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

\*See appendix for further details



# Sustainability Strategy: By Attraction Category

Due to the nature of the sites, it is unsurprising that Wildlife Attractions/ Zoos and Country Parks are the most likely categories to have environmental strategies in place. A high proportion of Country Parks also have 'social' and 'governance' strategies in place too.

Places of Worship also reported an above average likelihood of having an 'environmental' and 'social' strategy.

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

[%]	Country Parks ( <small>&lt;50</small> ) (20)	Farms ( <small>&lt;50</small> ) (15)	Gardens ( <small>&lt;50</small> ) (23)	Historic houses / castles (62)	Other historic ( <small>&lt;50</small> ) (40)	Leisure / theme parks ( <small>&lt;50</small> ) (12)	Museum / art galleries (217)	Steam / heritage railways ( <small>&lt;10</small> )	Visitor / heritage centres ( <small>&lt;50</small> ) (45)	Wildlife / zoos ( <small>&lt;50</small> ) (26)	Work-places ( <small>&lt;50</small> ) (12)	Places of Worship ( <small>&lt;50</small> ) (24)	Other ( <small>&lt;50</small> ) (10)
Environmental strategy*	90	53	65	68	58	67	56	( <small>&lt;10</small> )	56	85	67	63	50
Social strategy*	80	33	39	55	50	50	55	( <small>&lt;10</small> )	62	50	50	71	40
Governance strategy*	75	40	48	55	38	50	49	( <small>&lt;10</small> )	49	58	42	46	40
No regenerative tourism/ sustainable practices	-	27	26	23	25	25	26	( <small>&lt;10</small> )	20	15	25	17	50

Base: All answering sustainability question (515)

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

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

\*See appendix for further details



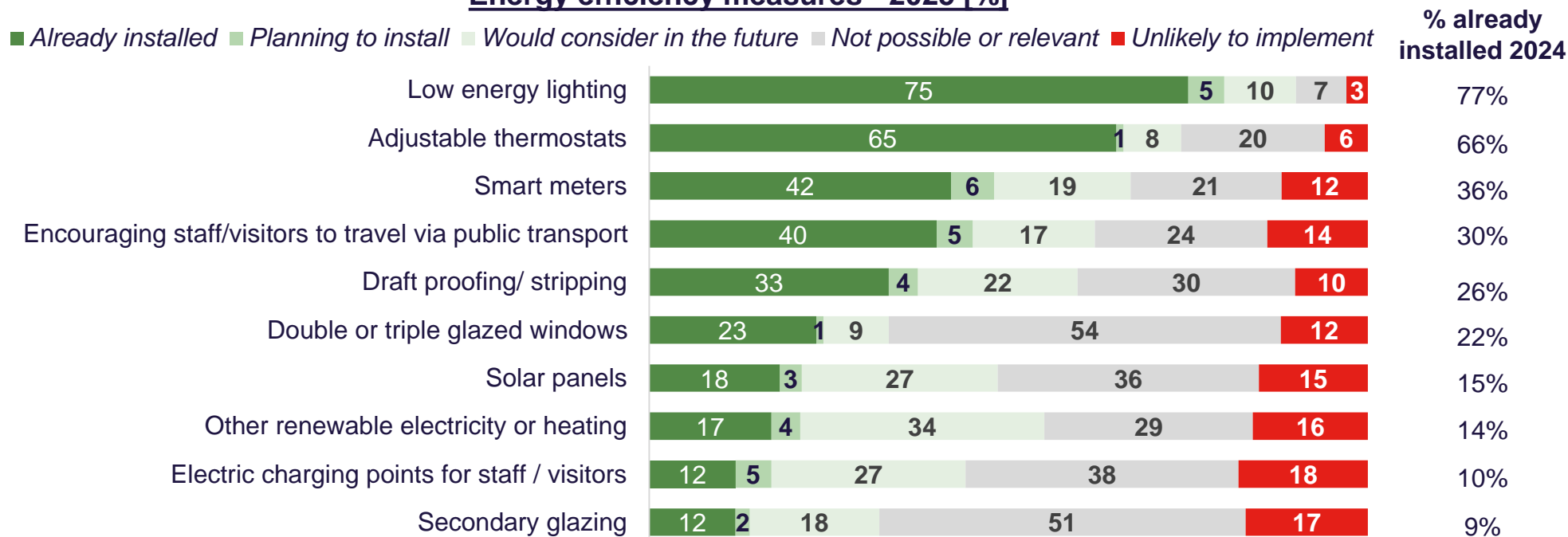
# Sustainability Action

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 these. Installation of smart meters, to monitor energy use, continues to be the fastest growing sustainability action, rising to 42% of sites in 2025, from 36% of sites in 2024 and 25% in 2023.

Action already in place to encourage visitors/ staff to travel via public transport is up from 30% in 2024 to 40% in 2025, but provision of electric charging points for staff/ visitors has not increased and remains as an action 'would consider in the future'.

Listed/ Historic buildings are likely a limiting factor to updating window glazing with half of sites saying, for each of double/triple and/or secondary glazing, they are not possible/relevant.

## Energy efficiency measures - 2025 [%]



# Investment in Energy Saving/ Carbon Footprint Reduction

Around 2 in 5 attractions measure their carbon footprint.

Close to a third of attractions invested in energy saving/ carbon reduction measures during 2024, rising to just over half among large attractions (>200k admissions per year). There was some variation by attraction category in likelihood to have taken action.

**39%**

of organisations measure their carbon footprint.

**32%**

of sites invested in changes to the fabric of their building or specialist equipment to save energy/ reduce their carbon footprint in 2024 (up from 27% in 2023)

## Investment in energy saving/ carbon footprint reduction in 2024 (%)

	2024 (%)
20,000 or less (231)	23%
20,000 – 100,000 (140)	35%
100,000 - 200,000 (52)	38%
<b>Over 200,000 (63)</b>	<b>56%</b>

## Investment in energy saving/ carbon footprint reduction in 2024 (%)

	2024 (%)
Country Parks (19) <50	26%
Farms (14) <50	14%
Gardens (23) <50	35%
<b>Historic Houses/Castles (54)</b>	<b>39%</b>
Other Historic Properties (37) <50	27%
Leisure/Theme Parks (12) <50	50%
<b>Museum/Art Galleries (214)</b>	<b>28%</b>
Steam/Heritage Railways <10	(<10)
Visitor/Heritage Centres (45) <50	36%
Wildlife Attractions/Zoos (26) <50	38%
Workplaces (12) <50	33%
Places of Worship (23) <50	48%
Other (10) <50	40%

Base: All answering carbon footprint questions (498-517)

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

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

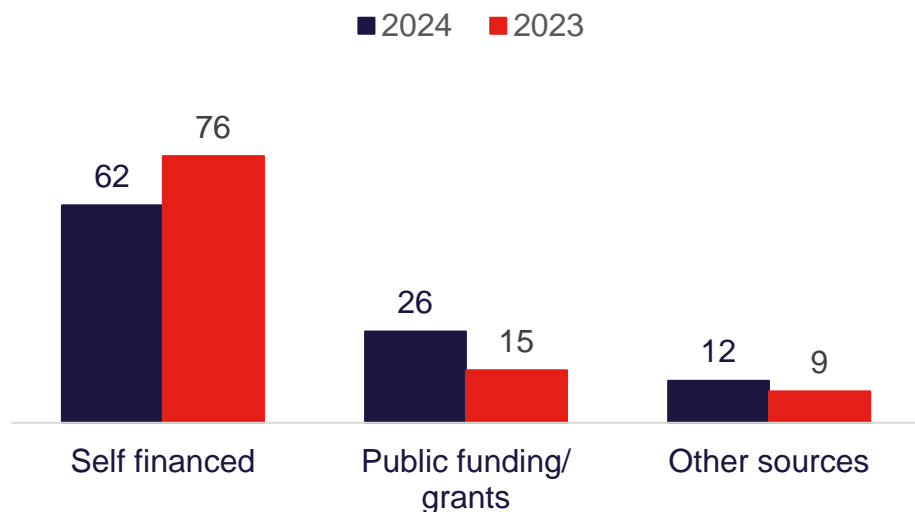
(<10) Base size below 10 (data not shown)



# Financing of energy saving/ carbon reduction

Among attractions who invested in energy saving/ carbon footprint reduction measures the proportion that did so using public funding / grants increased to around a quarter in 2024, from 15% in 2023, though the majority still self-financed – despite around half being aware of these grants

## Source of financing for energy saving/ carbon reduction measures\* (%)



## Awareness of funding options provided by the UK government to support installation of energy saving measures\*\* (%)

	2024 (% aware)
ALL (429)	48%
20,000 or less (211)	46%
20,000 – 100,000 (113)	52%
100,000 - 200,000 (42) <50	45%
Over 200,000 (51)	55%

\*Base: All answering and invested in changes to reduce carbon footprint / energy save in 2024 (154)

\*\*Base: All answering who did not fund changes in 2024 through public funding/ grants (429)

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. Accessibility Provisions**

# Accessibility Provisions 2024-25

In the last 12 months just under half of attractions had invested in at least one of the accessibility provisions they were shown. Each specific provision had been implemented by around a quarter of sites, and a further quarter said they were including them in future plans.



## 45%

of sites have invested in at least one of these enhancements to their accessibility provision within the last 12-months.

### 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
<b>Improve the built environment, amenities and services for visitors with accessibility requirements</b>	27	15	13	21	25
<b>Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements</b>	29	15	8	22	27
<b>Improve the information, marketing and digital inclusion for visitors with accessibility requirements</b>	25	19	9	27	19

Base: All answering Accessibility provisions question (515-517)

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

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



# 11. Appendix

# Sample & Response (1)

VisitEngland periodically reviews the attractions listing to refine this in light of the Visitor Attractions Definition. Two new attraction categories were added in 2024 to reflect changes in the sector:

- Permanent multi-sensory experiences (excluding immersive theatre/ cinema/ gaming/ dining)
- Extreme sports experiences in purpose-built venues (e.g. snowdome, indoor skydiving, inland surfing)

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, site feedback and based on sector news of attraction openings/ closures.

VisitEngland holds a database of 5,703 visitor attractions in England, of which 394 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).

The remaining 5,309 English visitor attractions were invited to take part in this year's survey.

1,373 (26% of) English visitor attractions responded to the survey in 2025, of which 20 sites had either permanently or temporarily closed and a further 33 were unable to respond. Responses were provided as follows:

817 completed online

102 completed by post

454 provided data through umbrella organisations

1290 sites were open and provided 2024 visitor numbers.

**1247 sites were open and provided visitor numbers in both 2023 and 2024 and these attractions form the basis of this report's visitor trend evaluation.**

# Sample & Response (2)

The admission size groupings of attractions responding is now close to 2019 levels, following a couple of years of disruption to the profile associated with the COVID-19 pandemic.

## Response by attraction size

Category	No. of attractions giving 2024 & 2023 data	2024 profile of attractions providing data*	2023 profile of attractions providing data*	2022 profile of attractions providing data*	2019 profile of attractions providing data*
10,000 or less	382	31%	31%	32%	29%
10,001 – 20,000	134	11%	13%	13%	12%
20,001 – 50,000	208	17%	17%	18%	19%
50,001 – 100,000	140	11%	11%	11%	11%
100,001 – 200,000	157	13%	11%	11%	11%
Over 200,000	226	18%	16%	15%	18%
Base size	1247	1247	1334	1295	1152

\* Based on sites providing data for the year before as well (e.g. when providing 2024 data, they also provided 2023 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 2024 & 2023	2024 profile of attractions providing data*	2023 profile of attractions providing data*
Country Parks	52	4%	3%
Farms	24	2%	3%
Gardens	67	5%	5%
Historic Properties	427	34%	33%
Leisure / Theme Parks	25	2%	1%
Museums / Art Galleries	428	34%	36%
Steam / Heritage Railways	15	1%	2%
Visitor / Heritage Centres	75	6%	6%
Wildlife Attractions / Zoos	53	4%	5%
Workplaces	18	1%	2%
Places of Worship	40	3%	3%
Other	23	2%	2%
Base size	1247	1247	1334

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 2024 data, they also provided 2023 data)



# 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 2024 & 2023 data	2024 profile of attractions providing data*	2023 profile of attractions providing data*
North West	132	11%	11%
North East	69	6%	7%
Yorks/Humber	133	11%	9%
East Midlands	107	9%	10%
West Midlands	115	9%	10%
East	162	13%	12%
London	88	7%	6%
South East	217	17%	18%
South West	224	18%	17%
Base size	1247	1247	1334

## Response by area type

Category	No. of attractions giving 2023 & 2022 data	2024 profile of attractions providing data*	2023 profile of attractions providing data*
Coastal	152	12%	12%
Rural	616	49%	53%
Urban	479	38%	35%
Base size	1247	1247	1334

## Response by admission type

Category	No. of attractions giving 2023 & 2022 data	2024 profile of attractions providing data*	2023 profile of attractions providing data*
Free	408	33%	33%
Paid	839	67%	67%
Base size	1247	1247	1334

\* Based on sites providing data for the year before as well (e.g. when providing 2024 data, they also provided 2023 data).

# 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>Extreme sports experiences</b>	Extreme sports activities at purpose-built venues, such as a snowdome, indoor skydiving centre or inland surfing centre. This excludes activities primarily used by hobbyists... and those not in a purpose-built venue
<b>Farm/ Rare Breeds/ Farm animals</b>	Attractions involving enclosed farm animals
<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>Multi-sensory experiences</b>	Permanent multi-sensory experience at a fixed location. Excludes immersive theatre/ or 4D cinema showings, gaming and experiences centred around dining or drinking.
<b>Place of Worship</b>	Attractions of any religion that are <u>still in use</u> as places of worship, Churches, Chapels (excluding worshippers)
<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>Nature Reserve/ Wetlands/ Wildlife trips</b>	Attractions that contain natural habitat environments for fauna, birds and wildlife, including wildlife trips
<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 classified as:**

**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

Multi-sensory experience (permanent)

Extreme sports experience

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 location of your attraction?** Coastal / Rural / Urban

**2.1 For 2023, 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 2023 visitor numbers:**

**2.2 What were your visitor numbers during the 2024 Calendar Year? (Please exclude special events outside normal opening hours or any private hire). Total visitor numbers (paid and free)**

**2.2a Are these numbers:** Exact? / An Estimate?

**2.2b Compared to last year you've had X% more/less visitors this year. Can you tell us what drove this difference in numbers?**

**2.2c If you are able, please provide the breakdown of visitor numbers by month.**

# Questionnaire: Visitors

**2.3 What percentage of total visitors in 2024 (paid and free) fell into each category? Adults % / Children % = Total 100%**

**2.4 For 2023, your organisation provided us with a total number of school children visits of:**

**Approximately how many schoolchildren visited your attraction as part of an organised group in 2024? Number of school children  
Is this number: Exact? / An Estimate?**

**2.5 Did you charge for admission to the main attraction in 2024? Yes / No**

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

**(a) in 2024 (including VAT): Adult / Child**

**(b) In 2023 (including VAT): Adult/ Child**

**2.7 Origin of visitors:** For 2023, your organisation provided us with a visitor profile of % from UK/ % from overseas.

**What percentage of total visitors in 2024 do you estimate were...?**

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

**(aii) From overseas**

**(b) Compared with 2023, was the number of visitors from overseas in 2024: Up / Down / Similar**

**(c) Compared with 2023, was the number of domestic visitors (from the UK) in 2024: Up / Down / Similar**

**2.8 i) What percentage of your total visitors in 2024 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %**

**ii) Compared with 2023, was the number of family group visitors in 2024: Up / Down / Similar**

# Questionnaire: Operations/ Marketing

## 3.1 Gross revenue

- a) How did the attraction's gross revenue in 2024 compare with 2023? Up / Down / Similar  
b) What was the percentage increase / decrease? %

## 3.2 Compared with 2023, was expenditure on marketing activities in 2024: Up / Down / Similar

## 3.3 Which of the following digital communications did your main attraction offer in 2024?

E-newsletters / Facebook page / Instagram / TikTok / Online booking facility (tickets, events) / Mobile apps / X (previously known as Twitter) / YouTube / Other social media (e.g. Threads, BlueSky) / None of these

## 3.4 Many attractions have been affected by the increase in inflation and rising costs in 2024. What impact, if any, has this had on your site?

	No impact/ not relevant to site	Had to increase costs to visitors	Reduced income for site	Had to remove/ reduce certain services
Rising energy costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rising staff costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rising supplier costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Questionnaire: Human Resources

**4.1 Compared with 2023, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2024 (including yourself, working owners and self employed)?:**

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

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

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

**Apprenticeships:** Up / Down / Similar / None

**4.2 How many staff of each type did your attraction employ in 2024, during the peak part of your year?**

Permanent / Seasonal / Unpaid volunteers / Apprenticeships

**4.3 And compared with 2024, do you anticipate the number of people employed (full or part time) in any tourism-related activities at the attraction in 2025 to be:**

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

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

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

**Apprenticeships:** Up / Down / Similar / None

**4.4a During 2024 did you engage in any staff recruitment – either to replace or supplement your existing staffing?**

Yes / No

**4.4b. Did you experience any difficulty in recruiting the right people for the role(s)? (ASKED IF 4.4a=YES)**

Yes / No

**4.4c. What impact, if any, did these recruitment challenges have on your attraction? (ASKED IF 4.4b=YES)**

Reduced opening hours / Reduction in exhibits/ activities available to visitors / Longer wait times / Not possible to complete planned work/ developments / Strain on existing staff members / Other (please specify) / There was no real impact

# Questionnaire: Accessibility/ Sustainability (1)

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

### Rows

- 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

### Scale

- 1. Have done in previous 12 months
- 2. Clear plans for the next 12 months
- 3. Clear plans for further ahead
- 4. Are considering, but no firm plans
- 5. No plans to consider this at the current time

## 5.4 In terms of the broader impact of your organisation, do you have a strategy in place to embed regenerative tourism /sustainable practices? If so, what does this cover?

- 1. Environmental strategy (e.g. environmental restoration and conservation)
- 2. Social strategy (e.g. community engagement and support)
- 3. Governance strategy (e.g. ethical and responsible business practices and legal compliance)
- 4. No regenerative tourism/ sustainable practices

## 5.5 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.

### Rows

- 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

### Columns

- 1. Already installed/ implemented / 2. Already planned/ budgeted implementation / 3.Would consider installing/ implementing in the future / 4. Not possible/ relevant at this site / 5. Unlikely to implement for other reasons

# Questionnaire: Accessibility/ Sustainability (2)

**5.6 Does your organisation measure its carbon footprint?**

Yes / No

**5.7 Did you invest in any changes to the fabric of your building or specialist equipment to save energy or reduce your carbon footprint in 2024?**

Yes / No

**5.8 How did you finance these measures? (ASKED IF 5.7=YES)**

Self-financed / Public funding/grants / Other sources (WRITE IN)

**5.9 What is the name of the public funding option/grant that you used? (ASKED IF 5.8=2 (PUBLIC FUNDING/ GRANT)**

WRITE IN

**5.10 Were you aware about the funding options provided by the UK government to support installation of energy saving measures?**

(ASKED IF 5.8=NOT 2 (DID NOT USE PUBLIC FUNDING/ GRANT)

Yes / No

**5.11 Does your attraction do anything to measure the social impact it has on its visitors?**

Yes / No

**5.12 How are you currently assessing social impact? (ASKED IF 5.11=YES)**

WRITE IN

**5.13 A comprehensive report of the research is published on VisitEngland's website and made freely available to all attractions. What else, if anything, would you like to know from this research, that hasn't been covered in this questionnaire?**

Please note, that the number of questions we can ask is limited, but we will aim to include any topics where there is significant demand.

WRITE IN

