Visitor Attraction Trends in England 2021 (6 top level take outs)

PROJECT BACKGROUND AND CONTEXT

PROJECT BACKGROUNG

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.

- **5,947 English visitor attractions were invited**
- 1,369 sites responded to the survey, of which 88 sites had either permanently or temporarily closed
    - 465 completed online
    - 343 completed by post
    - 561 provided data through umbrella organisations

- 1,142 sites were open and **provided 2021 visitor numbers**.
- Of which, **979 attractions were also open and provided 2020 visitor numbers and these attractions form the basis of this report's visitor trend evaluation**.

Visitor Attraction Definition

- *"…an attraction **where it is feasible to charge admission for the sole purpose of sightseeing**. The attraction must be a **permanently established** excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be **open to the public**, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be **a single business, under a single management**, so that it is capable of answering the economic questions on revenue, employment etc."*

2021 Context: COVID-19

England started 2021 with a third national lockdown with most visitor attractions required to close until mid-April, and legal limits on social contact not fully removed until 19th July.

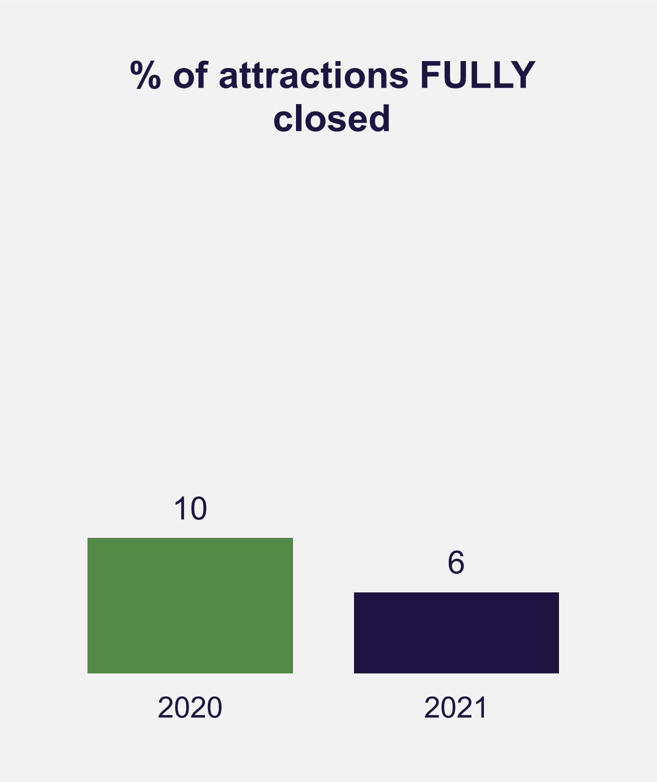
Overseas visitors to the UK declined for a second year, due to the travel restrictions and reduced appetite for travel associated with COVID.

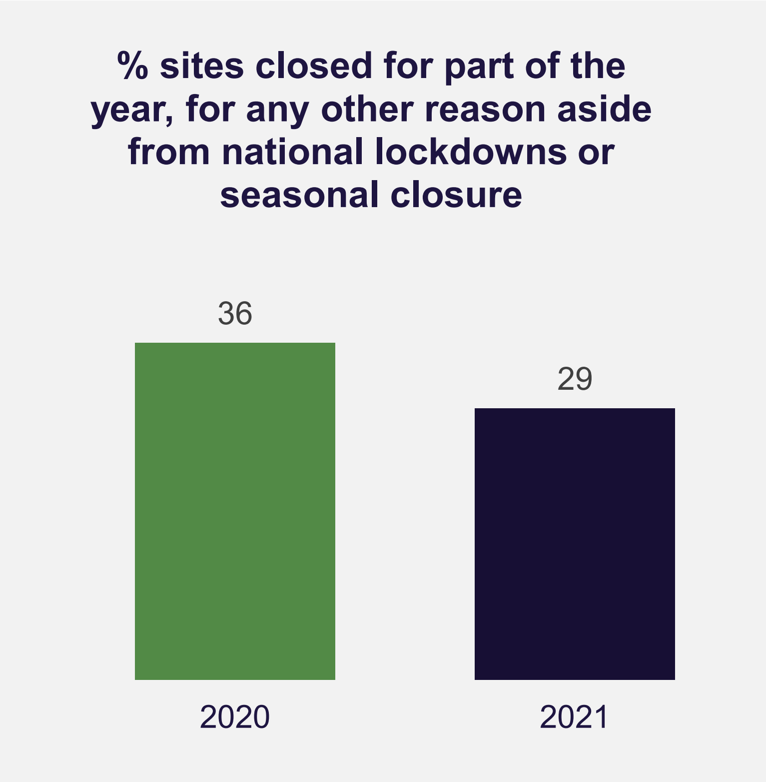
Key dates for visitor attractions:

6/1	Third national lockdown begins
15/2	Hotel quarantine for travellers arriving in England from 33 high-risk countries begins
8/3	Schools in England reopen
	Recreation in outdoor public spaces allowed between 2 people
29/3	'Stay at home' order ends, but people encouraged to stay local.
	Outdoor gatherings of 6 people or 2 households allowed
12/4	Visitor attractions allowed to reopen
	Social contact rules continue – no indoor mixing between different households
17/5	Limit of 30 people allowed to mix outdoors
	Indoor gatherings of 6 people or 2 households allowed
19/7	Most legal limits on social contact removed
30/9	Furlough/ job retention scheme ended
10/12	Face masks compulsory in most public indoor venues due to Omicron variant

Sources: ONS International Passenger Survey - Travel Trends: 2021; Institute for Government – timeline of UK government coronavirus lockdowns and restrictions; VisitBritain Sentiment Tracker

Compared to 2020, fewer sites were closed throughout 2021 and fewer were closed for part of the year. Top reasons for partial closures were regional lockdowns and not meeting Covid safety requirements





Closure due to…	2020 [%]	2021 [%]
Regional lockdown	29	N/A
Unable to meet COVID requirements on site	17	9
Not profitable to open	7	7
Insufficient staff/ volunteers	6	7
Any refurbishment/ repairs	7	11
Planned refurbishment/ repairs	Not asked	9
Refurbishment/ repairs brought forward due to COVID	Not asked	2
Other reason	6	5

Source: Annual attractions survey, 2021 data

On average, the maximum capacity during 2021 was 71% of the maximum capacity in 2019

	Maximum capacity during 2021 as a % of the maximum capacity in 2019 [Mean score]	Maximum capacity by the end of 2020 as a % of the maximum capacity in 2019 [Mean score]
Total Average (609)	**71**	**49**
Coastal (80)	74	52
Rural (332)	75	54
Urban (197)	64	54

Source: Annual attractions survey, 2021 data

6 TOP LEVEL TAKE-OUTS

TAKE OUT 1

VISITOR VOLUME

Take out 1: 2021 saw the green shoots of recovery although visitor volume remained behind 2019 level

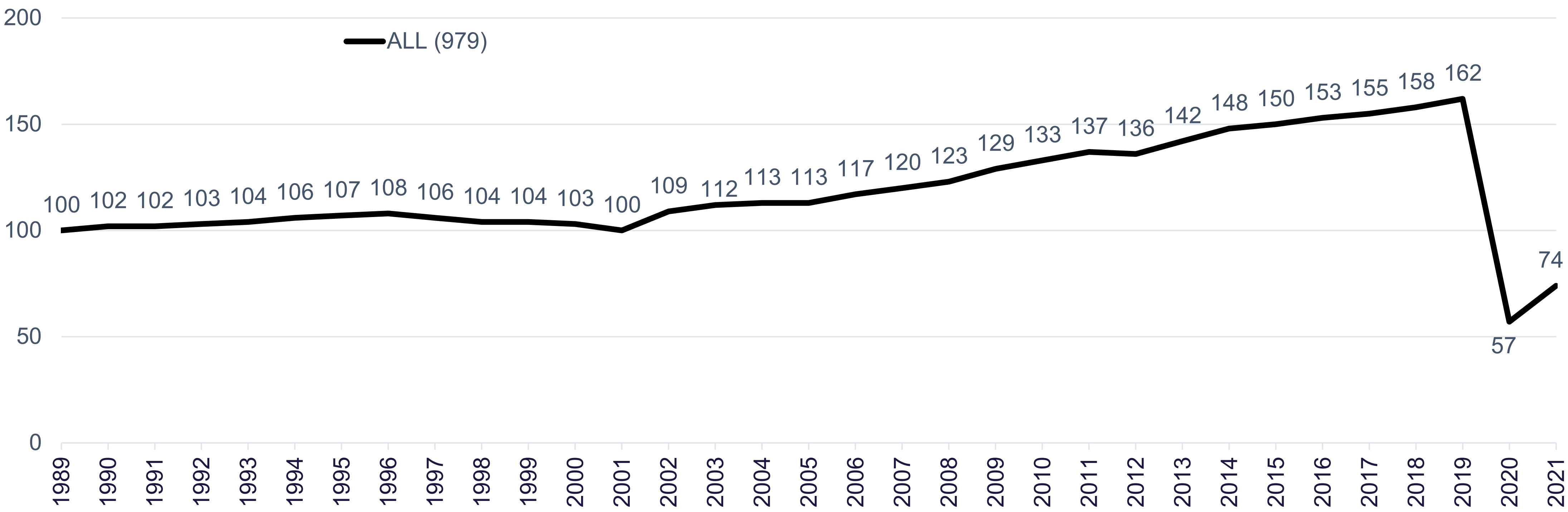
Admissions volume for participating attractions
(2020 and 2021 visitor volume was provided through the survey; 2019 visitor volume is an estimation based on the sector trend recorded in 2020)

	2019	2020	2021
Number of visits	**244.14 million**	**85.45 million**	**111.08 million**

	2019 to 2020	2020 to 2021	2019 to 2021
Annual change in number of visits	**-65%**	**+30%**	**-55%**

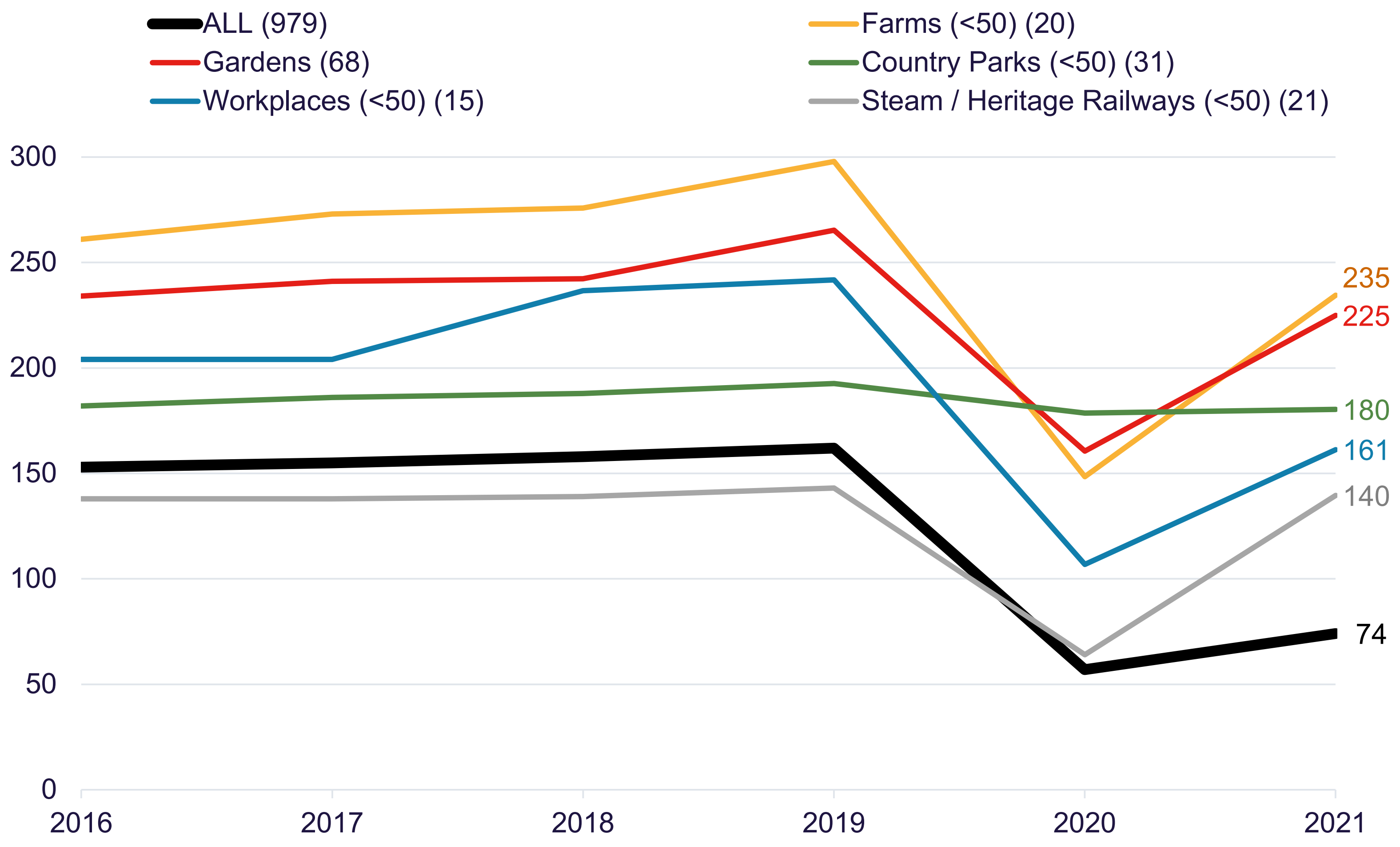
Source: Annual attractions survey, 2021 data

The visitor volume index is showing that while there has been an increase in 2021 (compared to 2020), the level of visits volume is still well behind pre-pandemic levels 2019



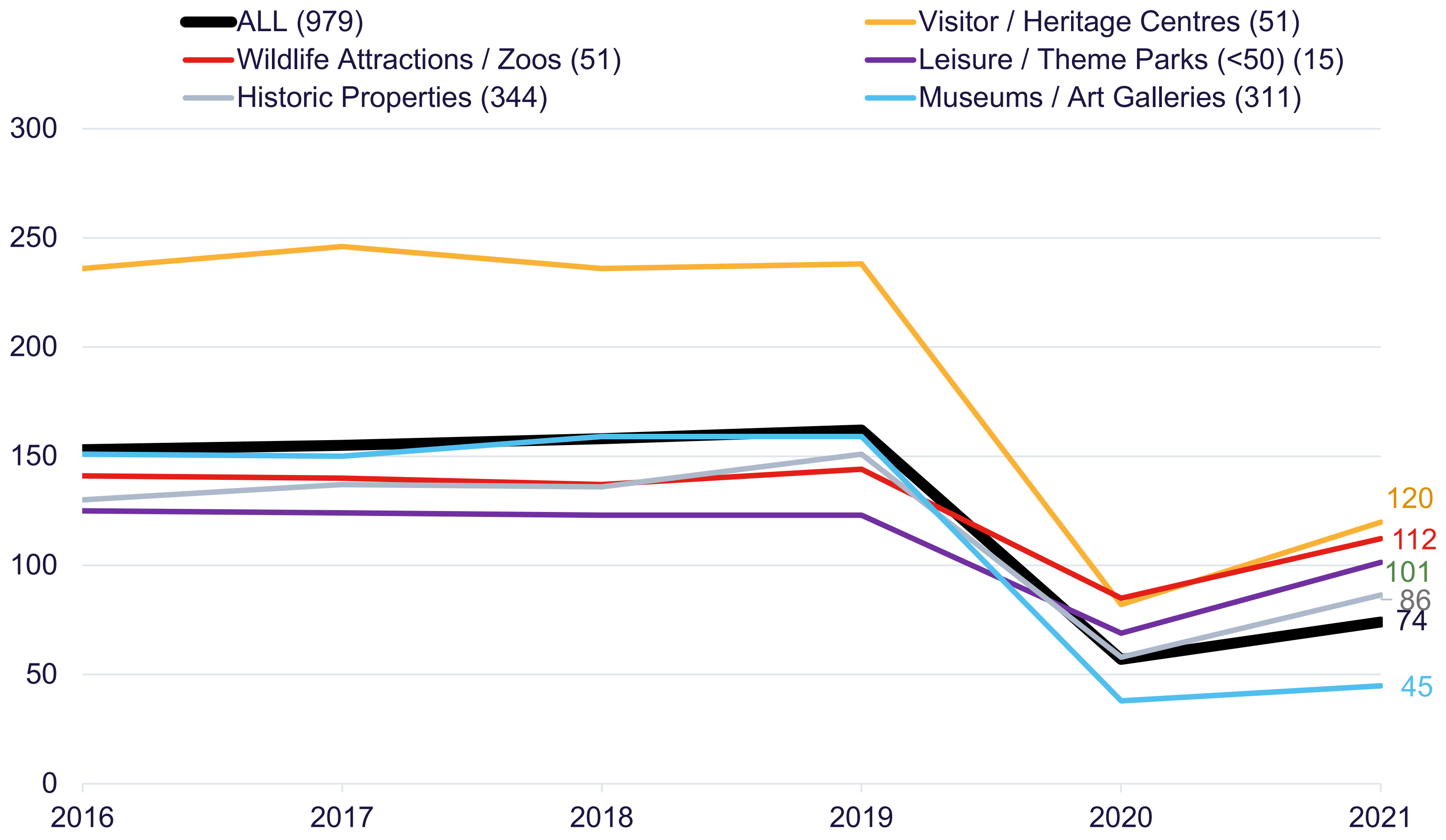
Source: Annual attractions survey, 2021 data

Looking at individual categories, country parks were least affected by the pandemic. And while farms were highly affected, they managed to recover to the highest level



Source: Annual attractions survey, 2021 data

Across categories less successful in building back the volume, visitor / heritage centres experienced the largest decline in 2020. Museum / art galleries made up least ground in 2021



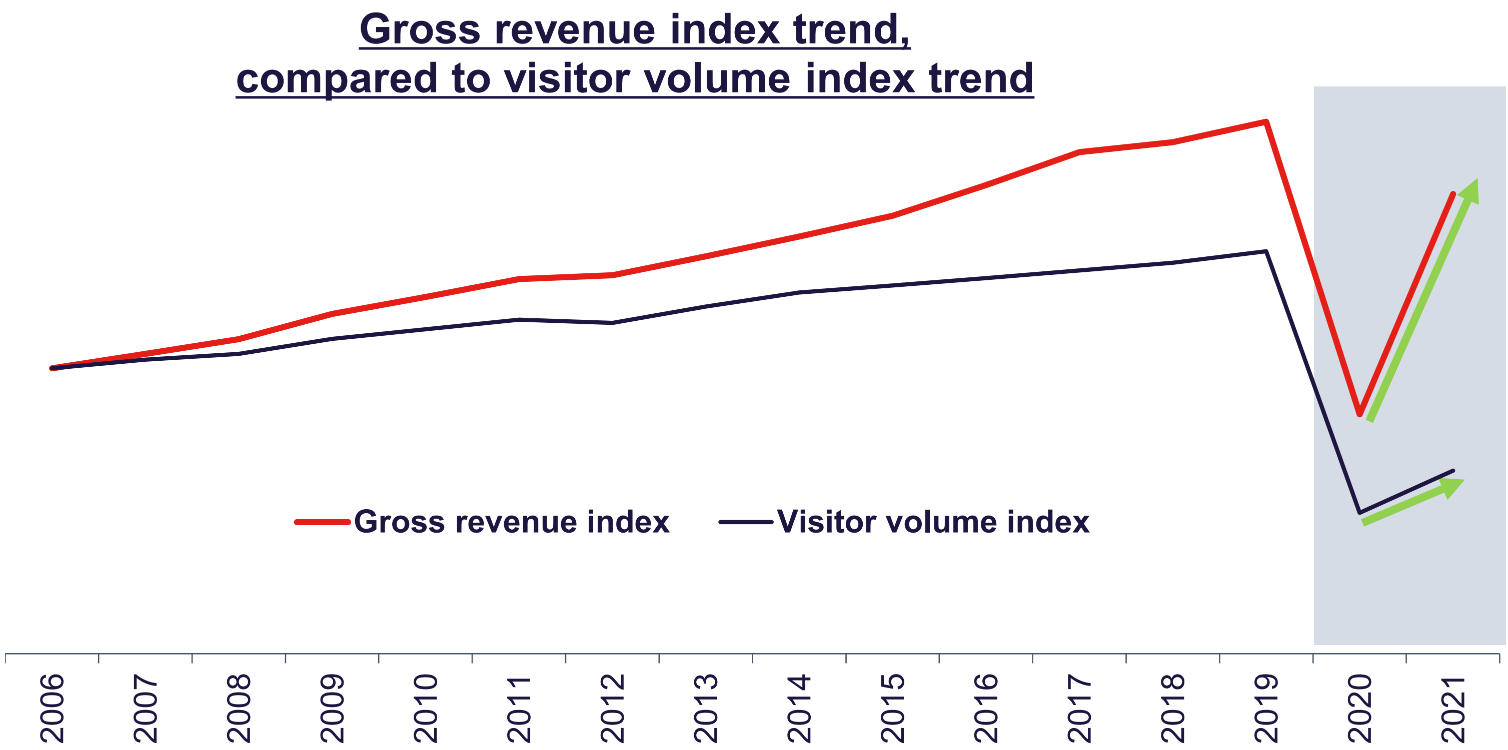
Source: Annual attractions survey, 2021 data

TAKE OUT 2

GROSS REVENUE

Take out 2: Gross revenue recovered faster than visitor volume

At an overall level, the gross revenue at visitor attractions increased by 92% in 2021, regaining some of the ground lost in 2020 when revenue declined by 55% on average.



Source: Annual attractions survey, 2021 data

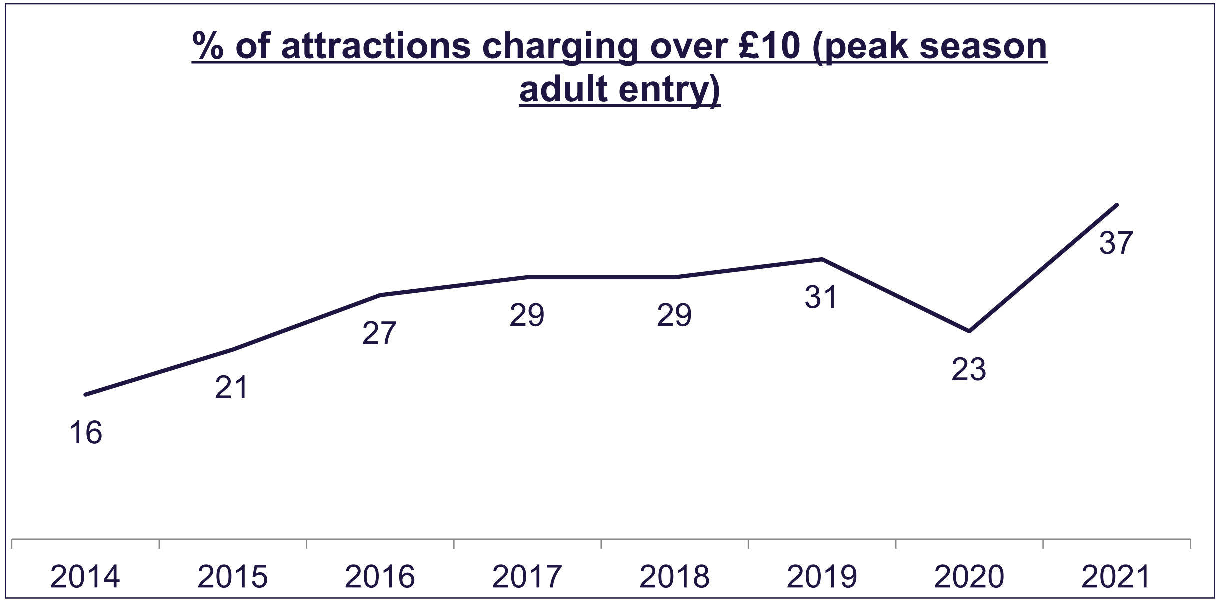
The faster recovery of gross revenue was driven partly by the greater growth in visitor volume of paid attractions and partly by increase in entrance fees

Visitor Volume Trends 2021

	2020/2021 change [%]	2019/2020 change [%]
Total Average	+30	-65
Free (310)	+19	-71
Paid (668)	+37	-60

Change in adult admission charge

	Average 2021 charge	2020/21 change [%]	2019/20 change [%]
ALL PAID ATTRACTIONS (743)	£10	+11	-6



Source: Annual attractions survey, 2021 data

Gross revenue increased across the country, but was highest in the South West and North West

Average % change in gross revenue

	2020/21 change (%)	2019/20 change (%)
North West (66)	+135	-60
North East (41) <50	+65	-56
Yorks / Humber (63)	+76	-35
East Midlands (63)	+74	-59
West Midlands (48) <50	+77	-58
East (77)	+72	-51
London (40) <50	+97	-67
South East (116)	+61	-59
South West (114)	+148	-53

Source: Annual attractions survey, 2021 data

TAKE OUT 3

EXTRA FUNDING

Take out 3: Recovery in 2021 was supported by use of additional revenue streams

In total, 81% of attractions accepted donations in 2021.

Of the sites which accepted donations:

35% reported an increase in donations in 2021 vs 2019

39% reported a decrease in donations in 2021 vs 2019

26% reported donations being at similar levels

58% of sites qualified for gift aid, and this has remained an important revenue source in 2021.

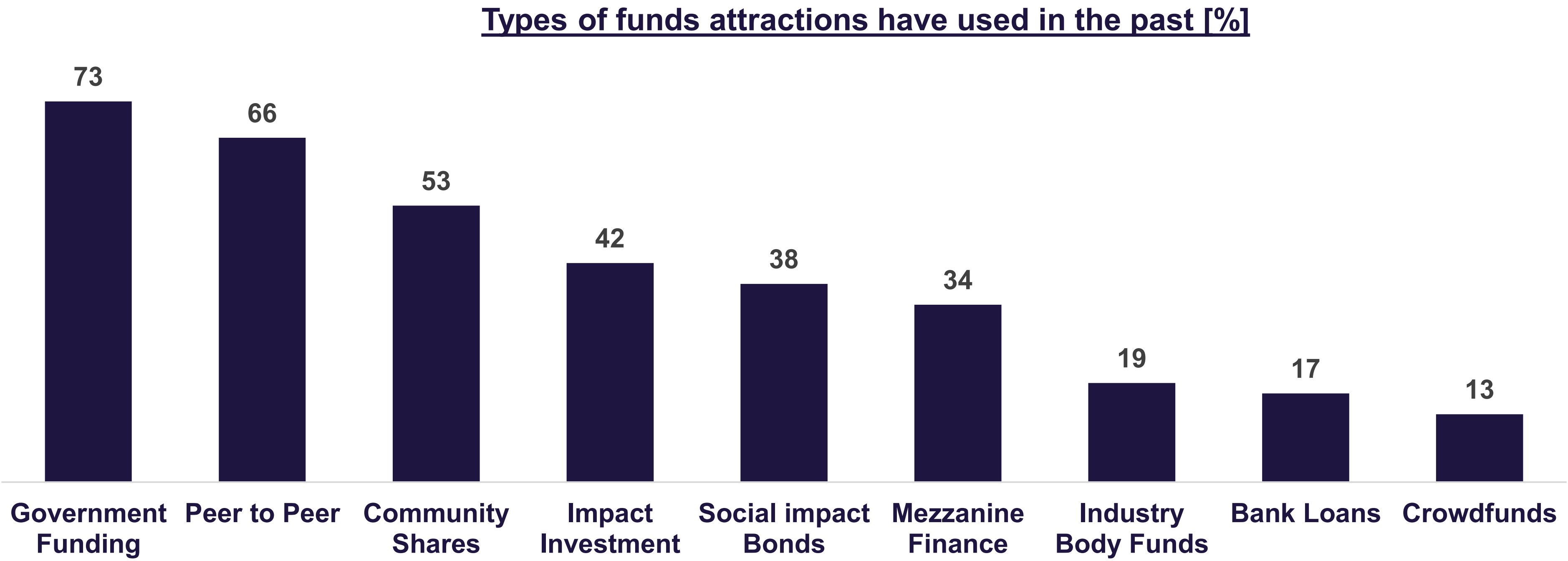
62% of attractions secured similar or higher levels of gift aid compared to before the pandemic in 2019

68% of all attractions sought additional funding during 2021

- **45% were able to secure what they needed**
- **20% were able to secure part of what we needed**
- **4% were unsuccessful in securing funding**

Source: Annual attractions survey, 2021 data

The funding sources that attractions have used most were: government funding, peer to peer lending and community shares



Source: Annual attractions survey, 2021 data

TAKE OUT 4

DIGITAL CONTENT

Take out 4: 66% of attractions developed (mostly free) digital content to engage with their audiences during the pandemic

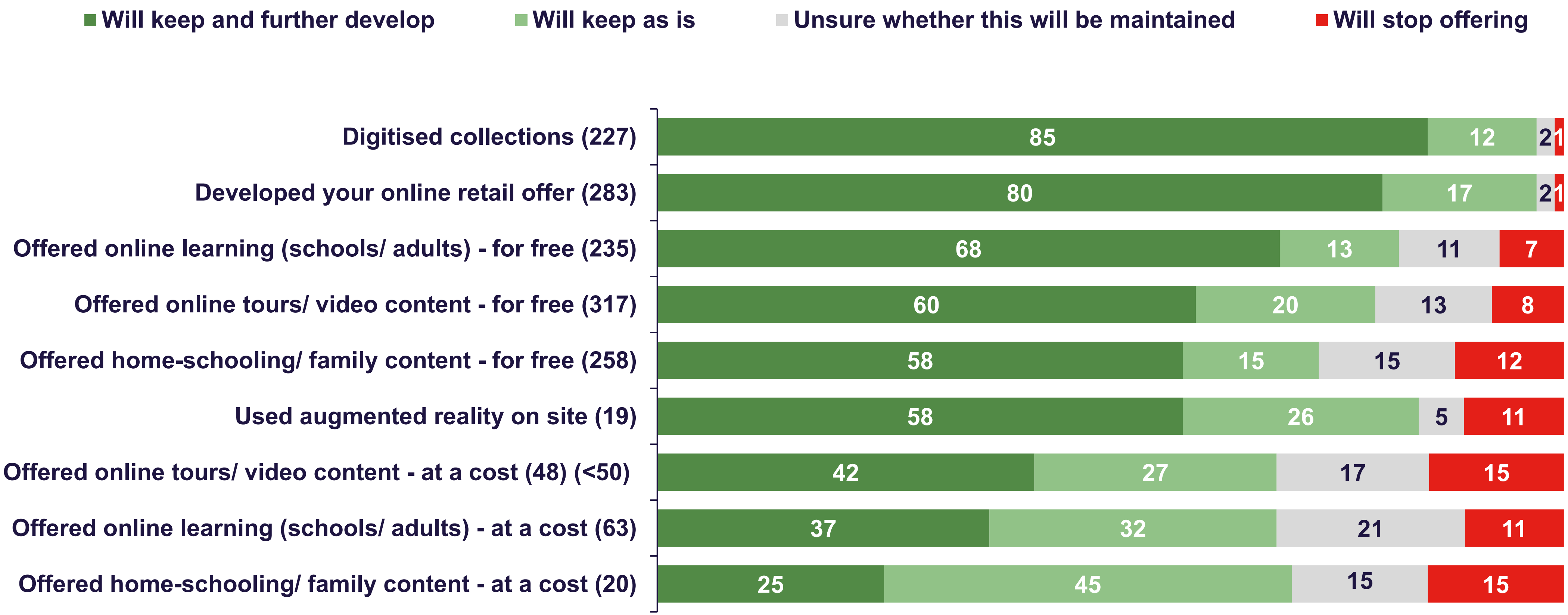
Marketing & content that attractions put in place to engage with their audiences during the pandemic [% of attractions introducing the specific content]

	2021	Free (361)	Paid (570)
Online tours/ video content - for free	36	30	40
Home-schooling/ family content – for free	30	24	33
Online learning (schools/adults) – for free	26	21	30
Online tours/ video content – at a cost	6	5	7
Home-schooling/ family content – at a cost	3	2	4
Online learning (schools/adults) – at a cost	9	7	10
Developed online retail offer	32	19	39
Digitised collections	25	19	29
Used augmented reality on site	2	3	2
None of these	34	35	33

Source: Annual attractions survey, 2021 data

… and most intend to maintain this moving forward

Future intentions for marketing and content developments post pandemic [%]



Source: Annual attractions survey, 2021 data

The marketing activities helped the revenue growth in 2021

Provision of free content actually had more impact on revenue than paid content – most likely because this reached more people.

Impact of marketing activities on business performance

	2020-2021 % change in gross revenue
Offered any FREE online content	+122%
Did not offer any FREE online content	+75%
Offered any PAID online content	+81%
Did not offer any PAID online content	+76%
Developed online retail offer	+116%
Did not develop online retail offer	+81%

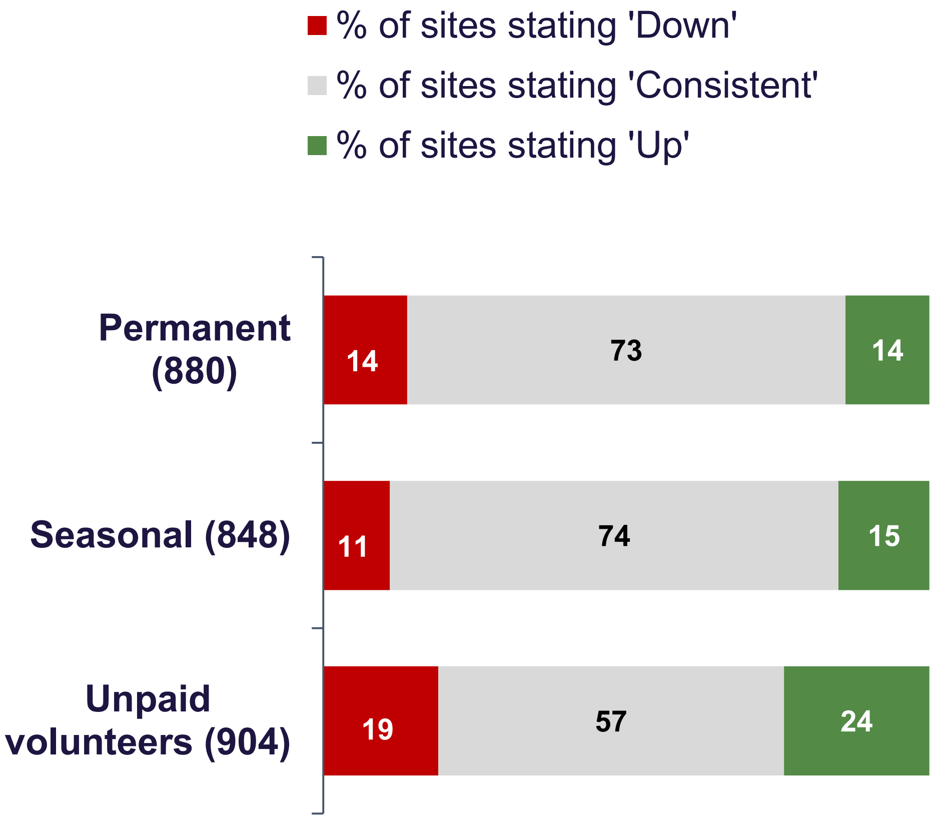
Source: Annual attractions survey, 2021 data

TAKE OUT 5

STAFFING

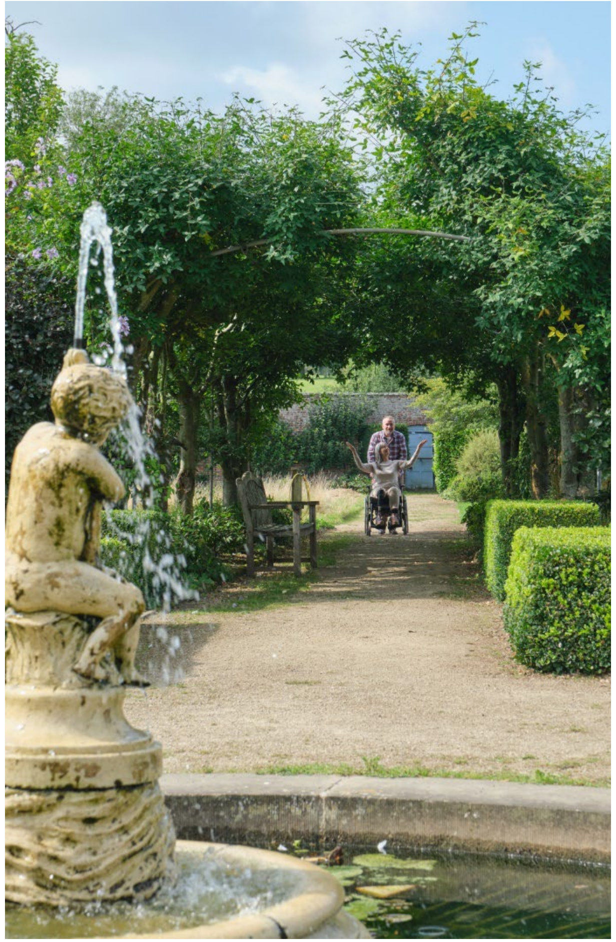
Take out 5: In 2021, site use of any permanent and seasonal staff remained consistent with 2020 … and so still below 2019 levels

2020/21 Stated change in employees



NET change on the previous year (‘up’ minus ‘down’)

2021	2020	2019
0%	-21%	+6%
+4%	-25%	+4%
+5%	-47%	+9%



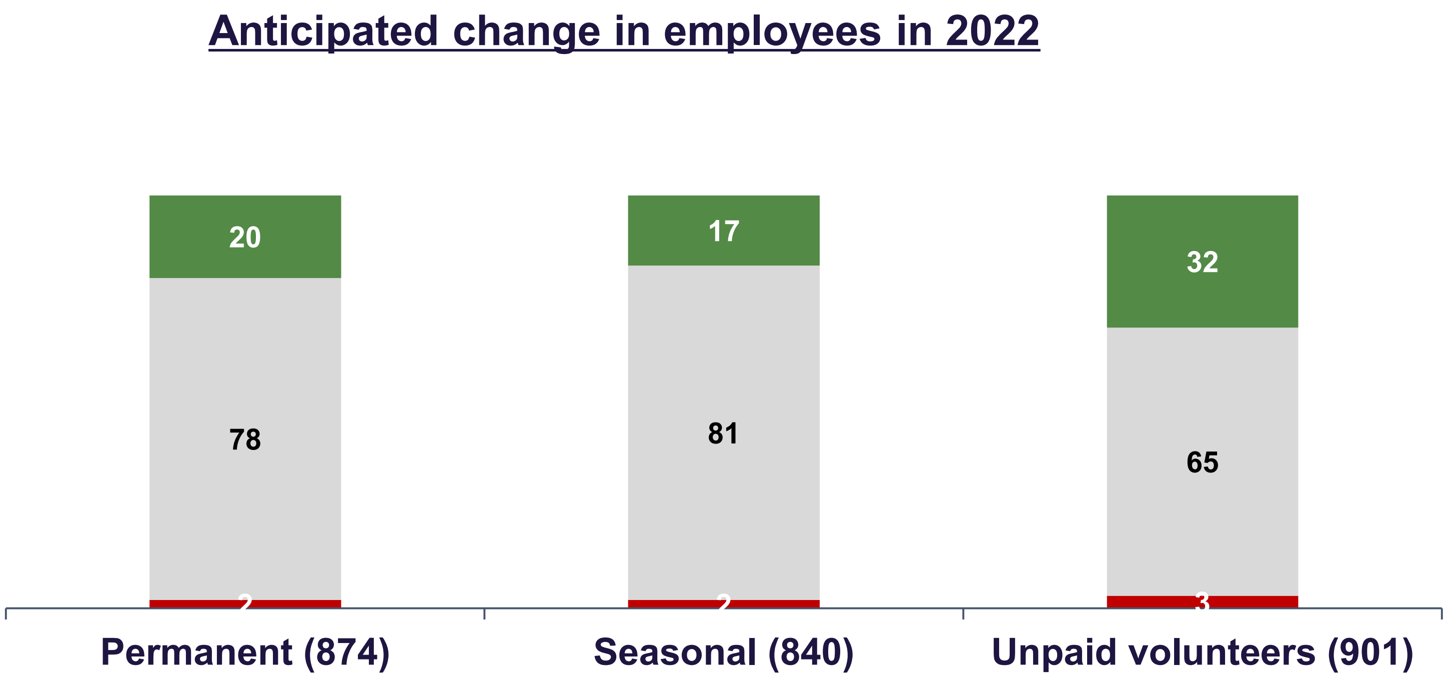
Source: Annual attractions survey, 2021 data

... considering the visitor volume and capacity increased in 2021 vs 2020, this led to staff shortages in 2021

NET change on previous year ('up' minus 'down')	2021 (vs 2020)	2020 (vs 2019)
Permanent staff	0%	-21%
Seasonal staff	+4%	-25%
Unpaid Volunteers	+5%	-47%
	2021 (vs 2020)	**2020 (vs 2019)**
Annual change in number of visits on previous year	+30%	-65%
	2021 (of 2019)	**2020 (of 2019)**
Maximum capacity as a % of the maximum capacity in 2019	71%	49%

Source: Annual attractions survey, 2021 data

Looking ahead to 2022, attractions expected an expansion in staff teams, in particular the use of unpaid volunteers

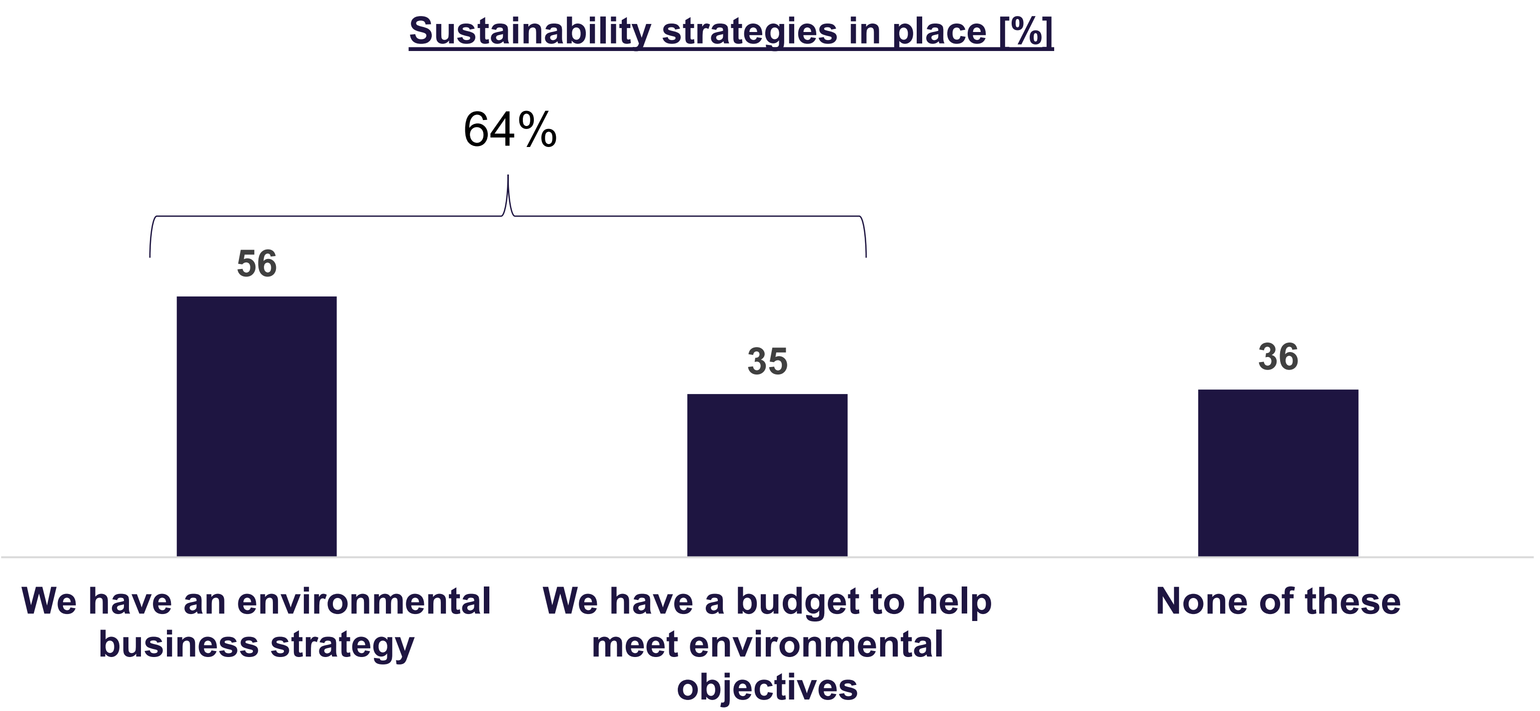


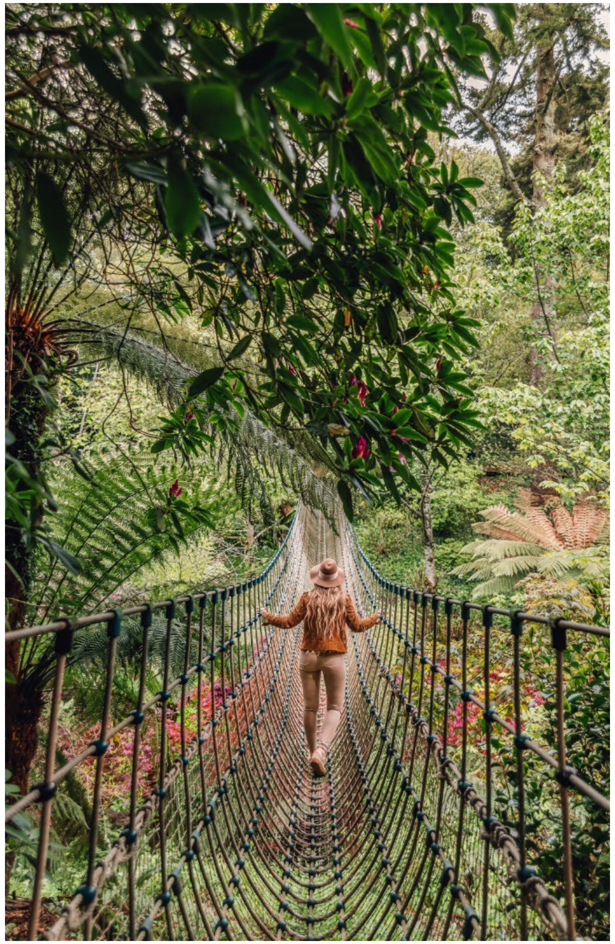
Source: Annual attractions survey, 2021 data

TAKE OUT 6

SUSTAINABILITY

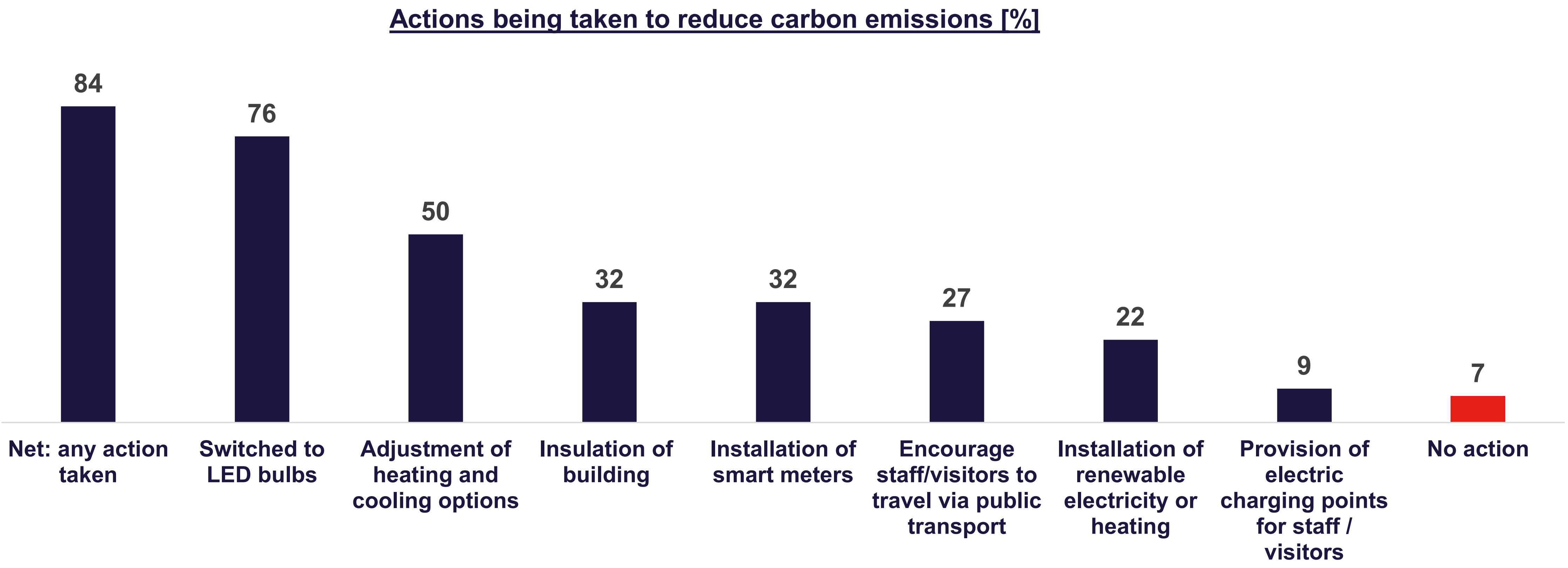
Take out 6: Sustainability is an important concern for attractions. 64% have an environmental business strategy or budget in place…





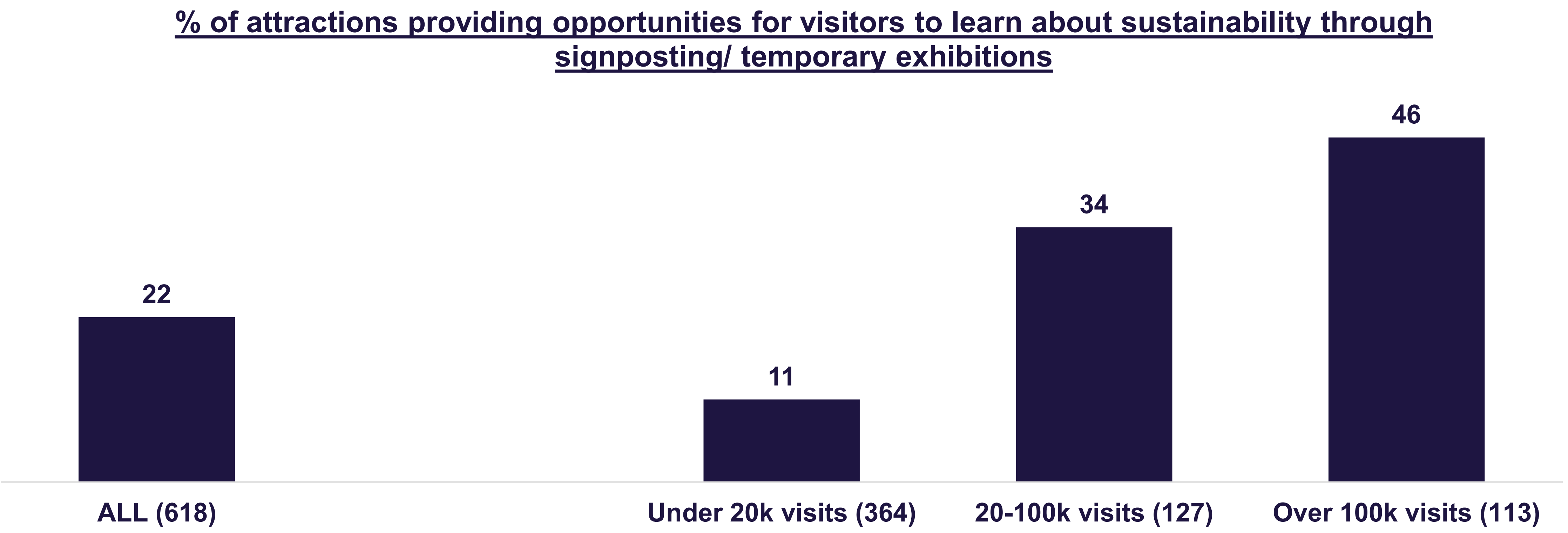
Source: Annual attractions survey, 2021 data

... and most (84%) have taken some form of action to reduce carbon emissions



Source: Annual attractions survey, 2021 data

… also, many attractions (especially large attractions) provide opportunities for visitors to learn about sustainability



Source: Annual attractions survey, 2021 data

THANK YOU!

Links to reports and listings

Full report is accessible on our website along with the full listings and top 20 attractions per region:

https://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results

You can also use the direct link to the report: https://www.visitbritain.org/sites/default/files/vb-corporate/2022-09-06_england_attractions_2021_trends_report.pdf

Page with previous reports (archive, for reference) is here: https://www.visitbritain.org/annual-survey-visits-visitor-attractions-archive

VISITOR NUMBERS & REVENUE

TOP 20 MOST VISITED FREE ATTRACTIONS: ENGLAND

Rank	Name of Attraction	2019 Visitors	2020 Visitors	2021 Visitors
1	Brighton Pier	4,901,221	4,110,005	4,260,485
2	Natural History Museum	5,423,932	1,296,763	1,571,413
3	British Museum	6,239,983	1,275,466	1,327,120
4	Abbey Gardens (Bury St Edmunds)	1,228,564	1,021,048	1,276,864
5	Tate Modern	6,098,340	1,431,704	1,156,037
6	Somerset House	2,841,772	724,310	984,978
7	Science Museum	3,301,975	861,795	957,223
8	Victoria and Albert Museum	3,992,198	872,750	857,742
9	Clacton Pier	Not available	450,000	741,000
10	National Gallery	6,011,007	1,197,143	708,924
11	The Horniman Public Museum & Public Park Trust	952,954	606,329	653,200
12	Wollaton Hall and Park	341,218	491,471	651,602
13	Tate Britain	1,808,637	382,139	525,144
14	British Library	1,534,860	334,070	403,312
15	Needham Lake and Nature Reserve	379,600	335,272	390,212
16	National Railway Museum	714,379	222,440	346,313
17	World Museum Liverpool	672,514	271,058	330,593
18	Imperial War Museum London	1,073,936	278,797	320,542
19	Midlands Arts Centre (MAC)	993,108	142,403	306,268
20	The Station (in Richmond)	345,556	165,960	294,535

As per last year's approach, country parks were supressed from the top 20 listing. To see their ranking, please view the **full listing** available on our website.

TOP 20 MOST VISITED PAID ATTRACTIONS: ENGLAND

Rank	Name of Attraction	2019 Visitors	2020 Visitors	2021 Visitors
1	Royal Botanic Gardens, Kew Gardens	2,316,699	1,222,956	1,963,171
2	Chester Zoo	2,086,785	1,182,652	1,601,327
3	RHS Garden Wisley	1,236,434	993,516	1,410,785
4	Windermere Lake Cruises	1,613,785	419,574	1,065,707
5	Trentham Gardens	Not available	543,113	772,678
6	ZSL Whipsnade Zoo	732,672	630,772	754,896
7	ZSL London Zoo	1,157,076	504,351	742,359
8	Tatton Park	769,000	580,000	740,000
9	Longleat Safari & Adventure Park	1,011,314	495,037	727,800
10	Blenheim Palace	984,913	424,416	599,601
11	Beamish, The Living Museum of the North	801,687	305,000	593,985
12	Eden Project	1,010,095	424,373	577,929
13	Cliveden	524,807	430,975	553,041
14	Westonbirt, The National Arboretum	566,565	484,533	552,230
15	Chatsworth	606,420	279,400	540,927
16	Attingham Park	557,136	483,946	536,382
17	Tower of London	2,984,499	447,812	525,569
18	Dunham Massey	340,235	388,908	522,346
19	Royal Academy of Arts	1,248,882	309,702	468,693
20	Land's End	Not available	286,466	429,886

* The Royal Academy of Arts has a range of mostly paid exhibitions with different entrance fees and few free exhibitions. There is no fixed entry fee. As per last year's approach, country parks were supressed from the top 20 listing. To see their ranking, please view the **full listing** available on our website.