Visitor Attraction Trends in England 2019
Full Report

October 2020

Contents

Acknowledgements

VisitEngland would like to thank all representatives and operators in the attraction sector who provided information for the national survey on which this report is based. For a number of attractions, data has been included with kind permission of ALVA (Association of Leading Visitor Attractions), English Heritage and The National Trust as well as several Destination Management Organisations, councils and museum / attraction groups. Where relevant this has been referenced in the report.

We also extend thanks to Professor Candlin at Birkbeck University for sharing her museums mapping database, which was used in the annual refresh of the database used for the Visits to Visitor Attractions research.

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

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September 2020

Introduction

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

Objectives

To monitor trends in the visitor attraction sector in England and to improve understanding of the dynamics of the sector. Findings contribute to estimates of the economic impact of tourism and inform development and planning work. Results allow operators to benchmark their operation within their category, within their region and across the sector as a whole.

Survey Method

Attractions have the option of either online or postal survey completion.

All attractions for whom email contacts are held are sent an email invitation with a link to their attraction's online questionnaire. Attractions not responding are subsequently sent a postal questionnaire alongside attractions with no or only generic email contacts.

A copy of the questionnaire is appended.

BVA BDRC holds the contract for the survey in England and is responsible for the preparation of this report.

It is important to highlight that major individual attractions can have a strong impact upon the proportion of visits within each region and attraction category. Their participation or non-participation in the survey year-on-year can result in large fluctuations in the data within each region and attraction category.

Visitor Attraction Definition

"…an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc."

Sample & Response

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

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

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

VisitEngland no longer rigorously monitors attractions openings and closures. The England attractions database was updated in 2020 using Experian business data and Birkbeck University's Museums Mapping database. This data was de-duplicated against the existing attractions database and closed sites were removed. Other sources, such as sector news, are also used to update the database with attraction openings and closures each year.

5,752 English visitor attractions were invited to take part in this year's survey.

1308 English visitor attractions responded to the survey in 2019, 1,208 of whom provided 2019 visitor numbers.

674 completed online

144 completed by post

490 provided data through umbrella organisations

1,152 attractions provided admissions for both 2019 and 2018 and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response

Response by attraction category

Category	No. attractions providing data for 2018 & 2019	2018 profile of attractions providing data	2019 profile of attractions providing data
Country Parks	31	*3%*	*3%*
Farms	20	*2%*	*2%*
Gardens	82	*6%*	*7%*
Historic Properties	419	*34%*	*36%*
Leisure / Theme Parks	12	*2%*	*1%*
Museums / Art Galleries	380	*32%*	*33%*
Steam / Heritage Railways	19	*2%*	*2%*
Visitor / Heritage Centres	62	*5%*	*5%*
Wildlife Attractions / Zoos	51	*5%*	*4%*
Workplaces	12	*1%*	*1%*
Places of Worship	32	*4%*	*3%*
Other	32	*4%*	*3%*
Total	**1,152**		

Sample & Response

Response by region

Category	No. of attractions giving 2018 & 2019 data	2018 profile of attractions providing data	2019 profile of attractions providing data
North West	110	*12%*	*10%*
North East	78	*5%*	*7%*
Yorks/Humber	102	*10%*	*9%*
East Midlands	107	*10%*	*9%*
West Midlands	101	*8%*	*9%*
East	162	*12%*	*14%*
London	77	*6%*	*7%*
South East	216	*19%*	*19%*
South West	198	*18%*	*17%*
Total	**1,151**		

Response by attraction size

Category	No. of attractions giving 2018 & 2019 data	2018 profile of attractions providing data	2019 profile of attractions providing data
10,000 or less	336	*29%*	*29%*
10,001 – 20,000	142	*12%*	*12%*
20,001 – 50,000	218	*20%*	*19%*
50,001 – 100,000	124	*11%*	*11%*
100,001 – 200,000	124	*11%*	*11%*
Over 200,000	208	*18%*	*18%*
Total	**1,152**		

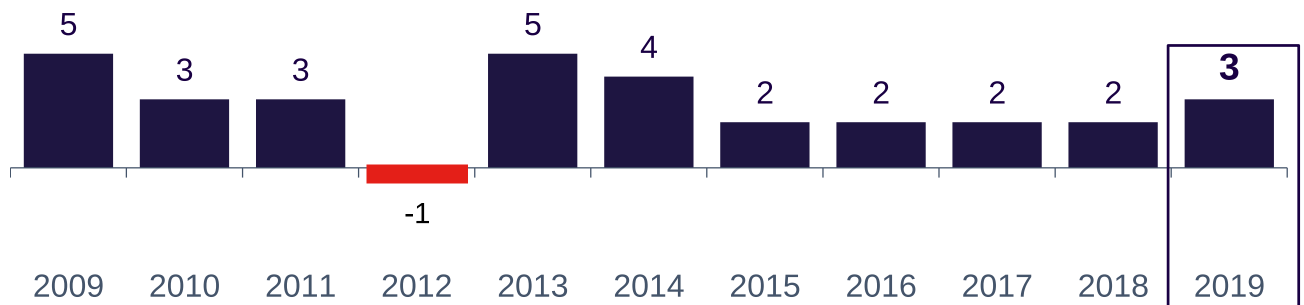
Response by admission type

Category	No. of attractions giving 2018 & 2019 data	2018 profile of attractions providing data	2019 profile of attractions providing data
Free	394	39%	34%
Paid	758	61%	66%
Total	**1,152**		

2019 Visitor Attraction Trends

Attractions in England reported a +3% increase in total visits from 2018 to 2019, slightly higher than the +2% recorded in each of the previous four years.

Annual % change in visits



2019 growth in visit volume was evident across a range of audiences, but school visits declined

Overseas visit	+2%
Local/Day visits	+2%
Child visits	+4%
School children visits	-5%

+5%

Adult admission fees increased well above the rate of inflation, but in line with price rises seen in recent years.

+4%

Gross revenue at attractions increased by +4% in 2019. Although higher than the increase in admissions, this is lower than the historical average (+5%).

Headlines: Admissions

Overall, attractions in England reported a +3% annual increase in total visits from 2018 to 2019, slightly higher than the +2% recorded in each of the previous four years.

This growth was supported by an increase in international holidays in 2019, which led to a **+2% growth in overseas visits to attractions.**

Local/ day trip visits also increased by +2% in 2019, despite a -12% decline in day visit tourism, indicating that attractions were able to capture a larger slice of the available domestic day trip market in 2019.

The volume of child admissions grew by +4%, reversing the decline seen in recent years.

In contrast, the number of school visits declined by -5% returning to the downward trend seen from 2014-2017 (2018: +1%, 2017: -2%, 2014-16: -1%).

Regional trends in visitor numbers varied significantly in 2019. All except two regions reported growth and exceeded their 2018 performance, with East Midlands (+7%) and East (+6%) having a particularly strong year. North West (-5%) and Yorkshire & the Humber (-2%) saw a decline in visitor volume.

Visitor admissions remained stable or grew across all attraction types. Garden attractions performed particularly well, despite a fairly average year weather wise, with +10% growth compared with 2018.


The National Museum of Art

Headlines: Revenue & Admission Pricing

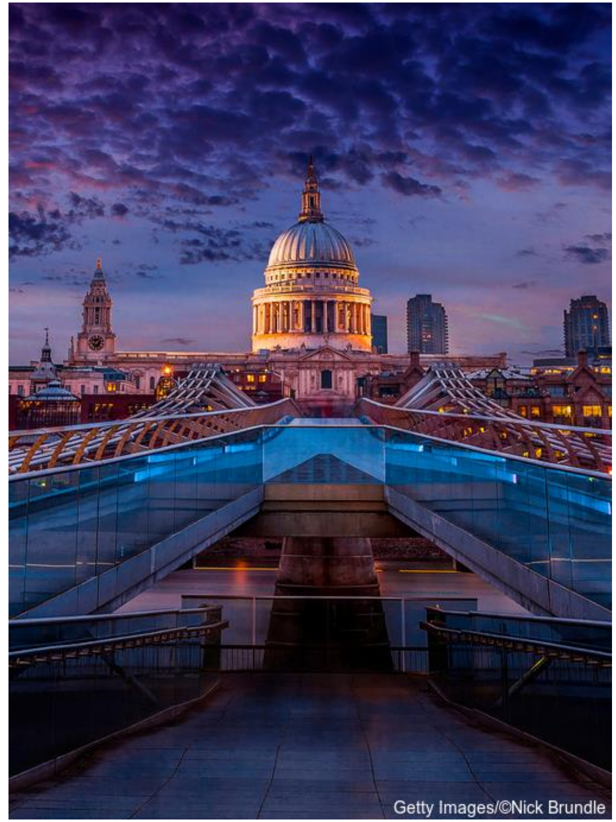
Gross revenue at attractions increased by +4% in 2019, which is slightly higher than the increase in visitor admissions, but lower than the historical average (+5%).

London and the South East saw the biggest gains in revenue, with average increases of +9% in both regions. These regions report above average adult entrance price increases of +8% (London) and +6% (South East), as well as growth of the local audience (London: +6%, South East: +11%) and an increase in marketing spend.

Overall adult admission fees increased by +5%, which is consistent with increases in recent years of between +4-6%. This is nearly double the 2019 rate of inflation of 2.6% (source: Bank of England, Consumer Price Inflation).

Adult admission price inflation was consistent across different sizes of attraction.

The proportion of paid attractions that charged for child entry increased slightly to 90%, up from 88% in 2018. Over the previous two years, child admission fees had increased at a higher rate than adult charges (2018: +8%, 2017: +7%) but 2019 saw inflation of child entry prices brought back in line with inflation of adult tickets, at +5%.


Getty Images/©Nick Brundle

Headlines: Marketing & Digital Communication

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

The difference in financial performance was quite distinct in 2019: those sites increasing their marketing spend increased gross revenue by +13%, compared with a decline of -1% amongst those who cut budgets.

Use of websites is now nearly universal (99%) at sites attracting 10,000 visits per annum or more. Even at smaller sites 9 in 10 (91%) have a website.

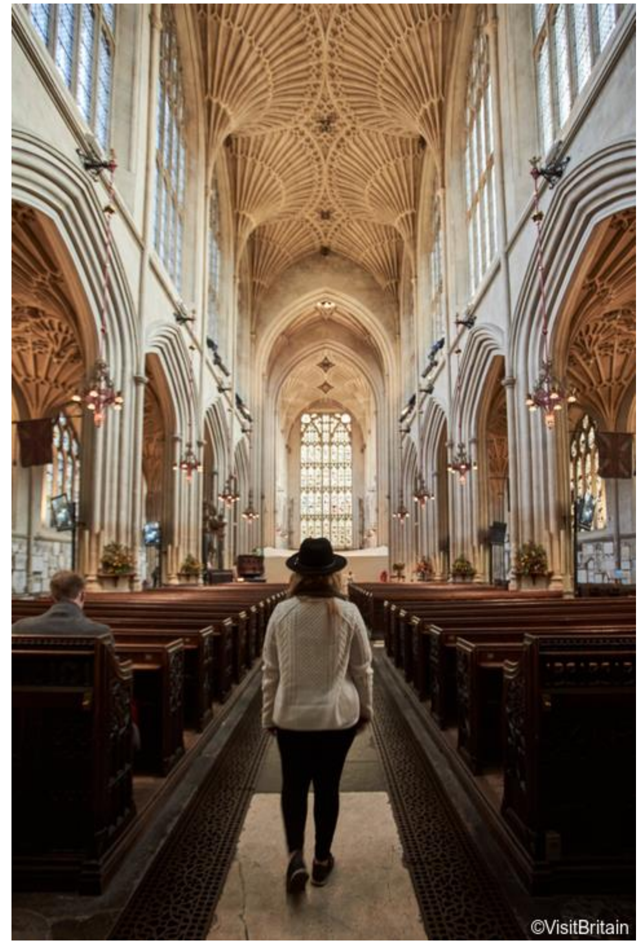
Use of online booking facilities, however, has plateaued at 37% although this result is likely to change substantially in 2020, with mass adoption of online booking as a means of managing social distancing during the COVID-19 pandemic.

Facebook (87%) and Twitter (67%) continue as the dominant social platforms but their use by attractions has only increased marginally over the last couple of years.

In contrast, use of Instagram/ Pinterest continues to rise, from just 22% of attractions in 2015 to 57% in 2019, and **use of 'other' social media more than doubled from 9% (2018) to 20% (2019).**

Mobile technology offerings remain limited with only 17% of sites offering mobile apps and 8% mobile websites.

On average, attractions using digital communications were more likely to grow visitor volume and gross revenue than those that did not.

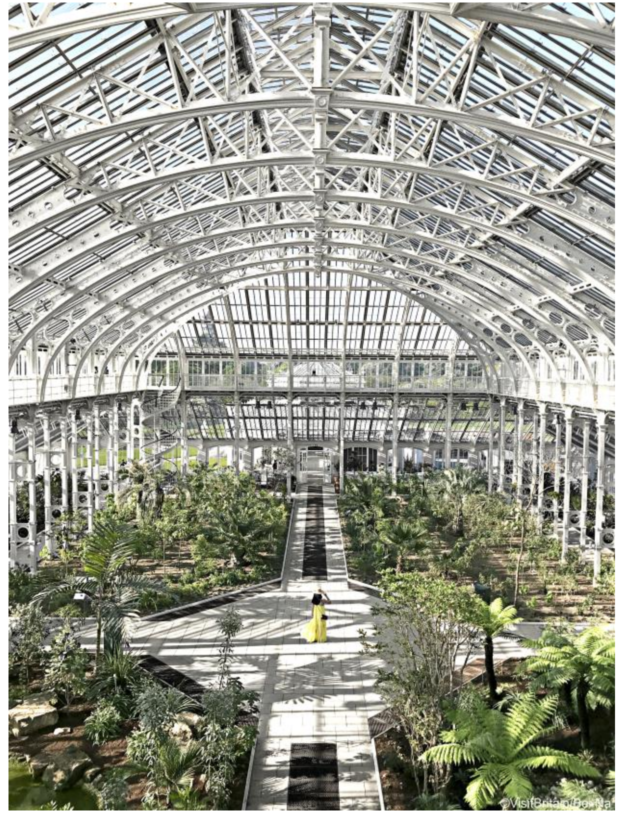


Headlines: Employment

Staffing levels within the attractions sector continued to expand from 2018 to 2019. However, this expansion has slowed across all staff types.

Once again, the largest growth was seen in unpaid volunteers, with 14% of attractions having increased their staffing in this area, compared with only 5% that saw a reduction.

Expectation in recent years has been for this growth in staffing levels to continue. However, in 2019 this changed, with all types of staff anticipated to reduce in 2020. The survey was completed during the COVID-19 pandemic, which is likely to be impacting these results.



Headlines: Site Access

Over a fifth (21%) of attractions in England currently remain inaccessible to people needing to travel via public transport.

The large majority of attractions in coastal and urban locations are accessible (90% and 96% respectively), but this drops to only 65% of rural attractions.

Half of all attractions are supported by frequent public transport links, but these do not always take visitors to the attraction entrance. In fact, buses/ trains only stop near the entrance of 33% of sites so it is important to consider the onward journey for visitors with mobility needs.

2019 UK Weather Summary

2019 was warmer and sunnier than average for the UK, although slightly less so than both 2018 and 2017.

February was unusually warm and sunny (the second warmest since 1910), except in the far North West. March, April, July and December were all warmer than is typical for these months, with a dry, sunny Easter weekend and August bank holiday weekend.

It was also a rather wet year, with above average rainfall in March and then most months from June onwards, leading to numerous incidences of flooding from the end of July onwards once the ground had become saturated.

Five named storms affected the UK during 2019, particularly during the early parts of the year.

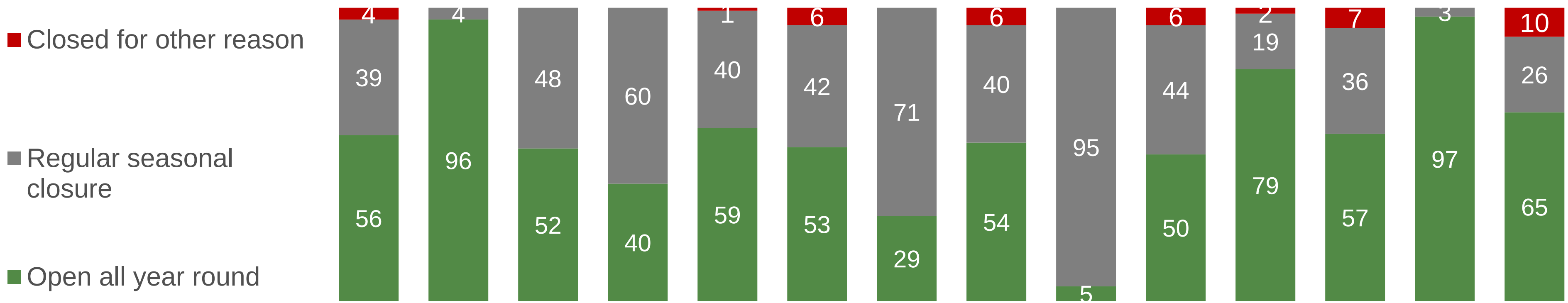
Storm Erik (Feb 8th) affected western and northern England, Storm Freya (Mar 3-4th) and Storm Gareth (Mar 12-13th) also impacted western and northern areas with heavy rain and winds in March and Storm Hannah (Apr 26-27th) brought strong winds to Southern areas in April. Storm Atiyah affected Southern England towards the end of the year (Dec 8-9th).

Source: MET Office

Attraction Opening: By Attraction Category

In 2019 56% of attractions remained open throughout the year, marginally lower than in 2018 (58%). Country Parks and Places of Worship remain the most likely to remain open all year around, followed by Wildlife Attractions. Steam and Heritage Railways are the most seasonal with 95% closing at some point during the year.

4% of attractions were closed for ‘other’ reasons (e.g. restoration work). Other closure was most common at ‘Other attractions’ - this category including caves, piers, sports stadium tours, model villages and so on (10%) and workplaces (7%).



	ALL (973)	Country Parks (<50) (28)	Farms (<50) (23)	Gardens (55)	Historic Houses/Castles (180)	Other Historic Properties (106)	Leisure/Theme Parks (<50) (14)	Museums/Art Galleries (362)	Steam/Heritage Railways (<50) (20)	Visitor/Heritage Centres (62)	Wildlife Attractions/Zoos (<50) (48)	Workplaces (<50) (14)	Places of Worship (<50) (30)	Other (<50) (31)
% open all year in 2018	58	92	63	46	55	52	40	56	16	59	79	86	88	67

Base: All attractions answering opening times question (973)

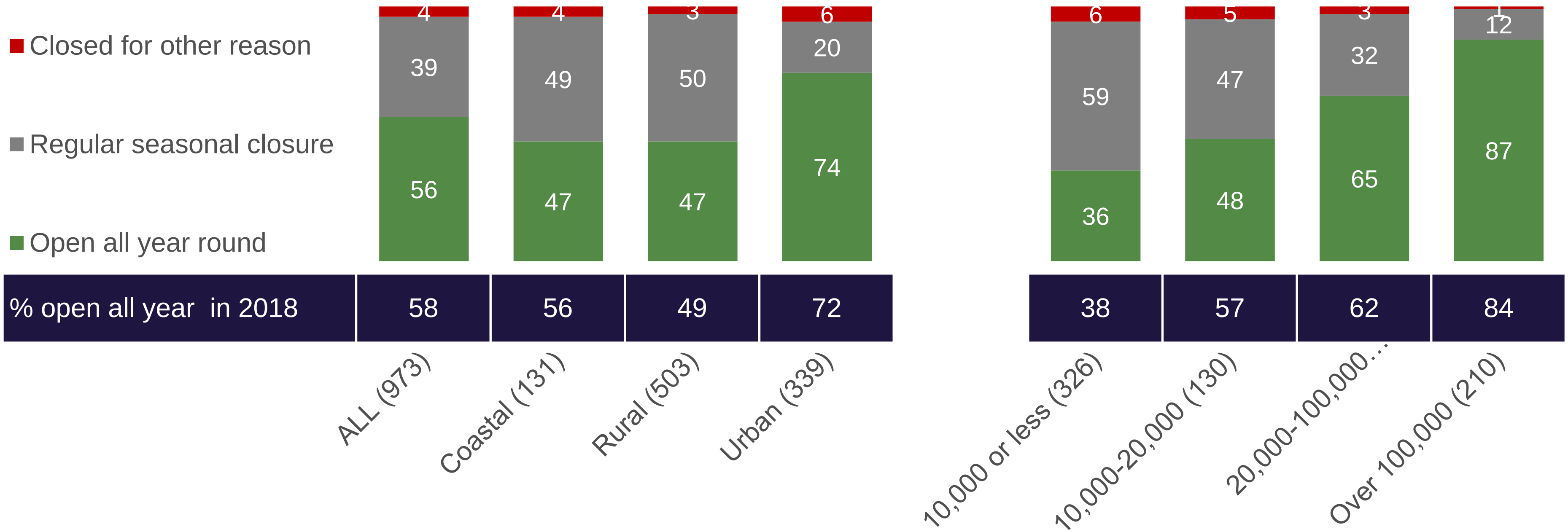
(<50) Base size below 50 (please treat with caution)

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

Attraction Opening: By Destination Type & Attraction Size

Year round opening correlates with visitor volume; larger attractions and those situated in urban areas more likely to remain open all year round (87% and 74% respectively).

In 2018 we saw a dip in seasonal closure in coastal and rural areas; this reverted back to 2017 levels in 2019.



Base: All attractions answering opening times question (973)

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

Visitor Admission Trends

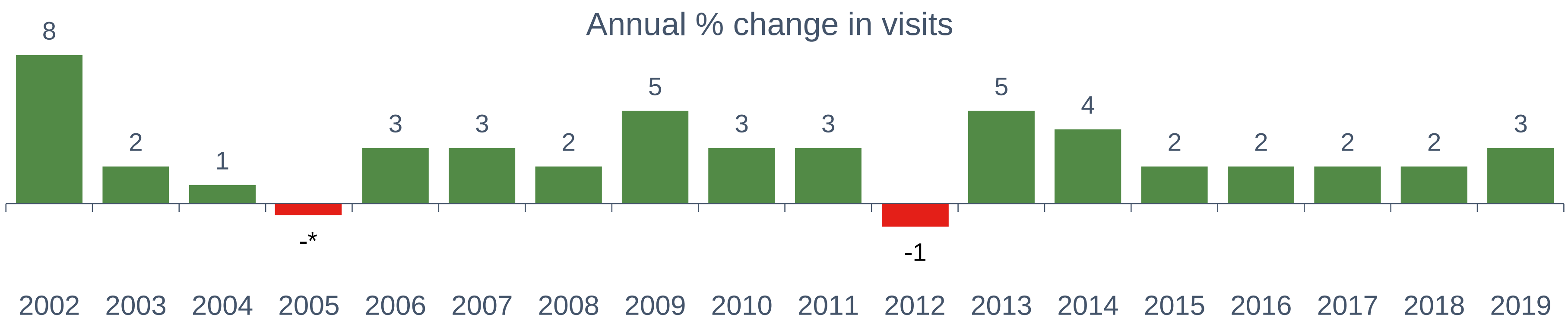
Overall Visitor Admission Trends

Overall, attractions in England reported a +3% annual increase in total visits from 2018 to 2019, slightly higher than the +2% recorded in each of the previous four years.

This growth was supported by an increase in international and domestic holidays in 2019. The International Passenger Survey (ONS International Passenger Survey 2019) recorded an increase in the volume of overseas visits to the UK of +1% in 2019 when compared with 2018, with holiday visits up by +3% and spend across all visit types up +7%.

The volume of domestic overnight tourism also increased from 2018 to 2019 (+3%), with holiday trips particularly buoyant (+6%) according to the Great Britain Tourism Survey (VisitBritain GB Tourism Survey 2019).

The market was less favourable for attractions reliant on domestic day visits: the Day Visit Tourism Survey (Day Visit Tourism Survey 2019) reported a fall of -12% in day visits compared with 2018.



Base: All attractions providing visits data for current and previous year (1,152 in 2019)

* % change is under 1%, therefore not shown

Visitor admission trends 2019: By Attraction Category

Almost all categories of attraction saw growth in visitor volume in 2019, with five categories (gardens, farms, places of worship, wildlife attractions and historic houses/ castles) increasing visitor admissions by +5% or more.

Gardens performed particularly well, despite a fairly average year weather wise, with visitor numbers up +10%, compared with 2018. This increase was evident across most gardens, but category growth was particularly driven by Kew Gardens and RHS Wisley, both bolstered by capital development projects completed by summer 2019.

Leisure/ theme parks and 'other' attraction (e.g. caves, piers, sports stadium tours, model villages) categories have not benefited from the sector growth seen over the last couple of years, with a change in visitor numbers of less than 1% over the last two to three years.

Visitor admission trends 2019: By Attraction Category

	2018/19 change (%)	2017/18 change (%)
Total Average	+3	+2
Country Parks (31) [<50]	+3	+1
Farms (20) [<50]	+8	+1
Gardens (82)	+10	*
Historic Houses/Castles (303)	+5	-1
Other Historic Properties (116)	+3	*
Leisure/Theme Parks (12) [<50]	*	*
Museums/Art Galleries (380)	*	+6
Steam/Heritage Railways (19) [<50]	+3	*
Visitor/Heritage Centre (62)	+1	-4
Wildlife Attractions/Zoos (51)	+5	-2
Workplaces (12) [<50]	+2	+16
Places of Worship (32) [<50]	+7	+3
Other (32) [<50]	*	*

Base: All attractions providing visits data for current and previous year (1,152)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

[<50] Base size below 50 (please treat with caution)
* % change is under 1%, therefore not shown

Index of Visits to Attractions: Calculation

The charts presented on slides 21 and 22 show the **indexed visits trend** for each attraction category. The **base year for the index is 1989, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. visits to museums / art galleries increased +4% between 1989 and 1990, increasing the index for 1990 to 104.

Because the number of attractions responding each year differs, the percentage change between any two years is applied each time to the previous year's index to take account of varying sample sizes each year.

Operators are asked in each survey year to provide the number of visits for both the survey year and previous year. This enables the trend between any two years to be calculated based on the same attractions.

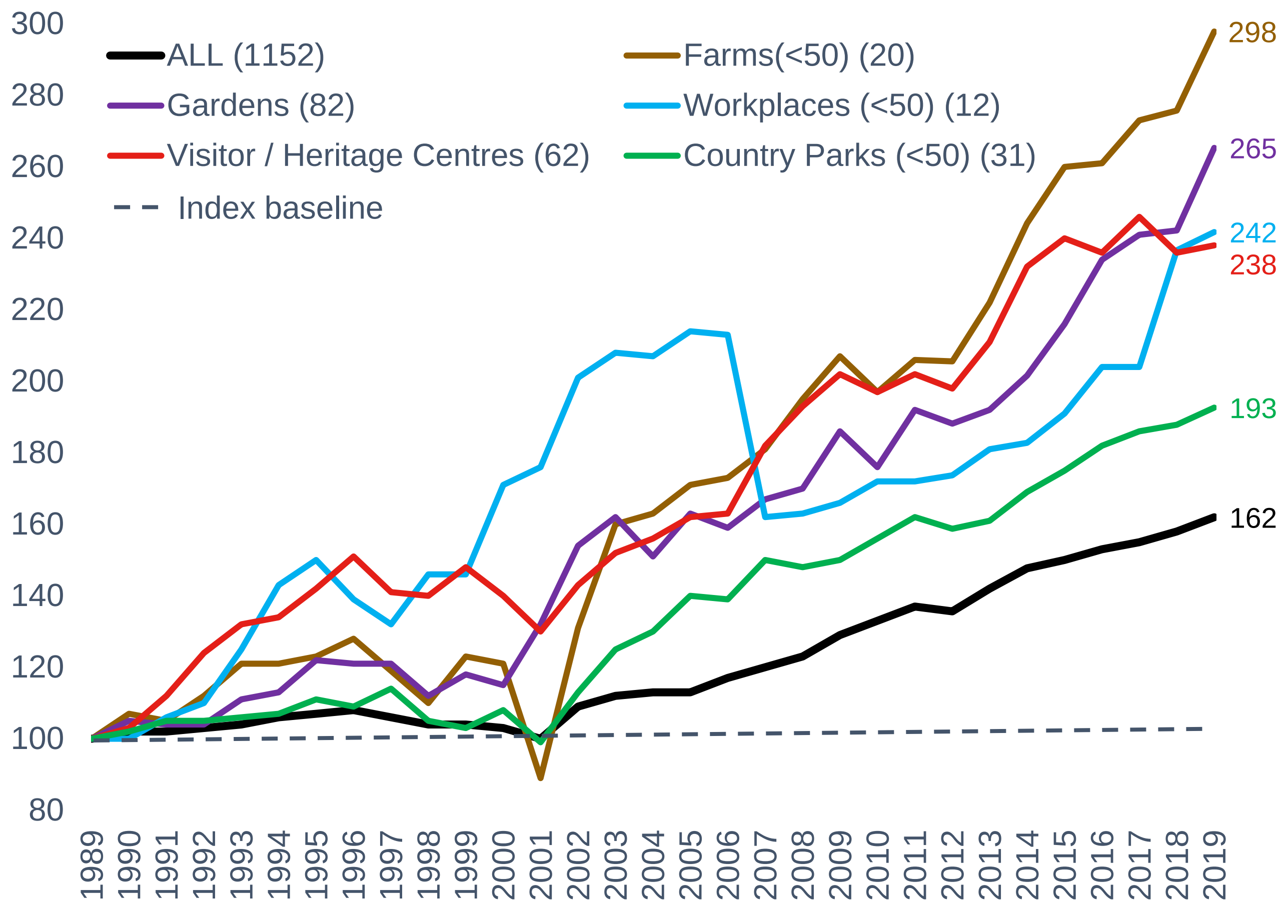
Index of Visits to Attractions: Sectors Outperforming vs. Market

This chart illustrates the attraction categories which have shown above average annual visit increases since 1989. **Across England, attractions as a whole ('all'), visits have increased by 62% during that time (index of 162).**

Farms continue to lead the sector in visitor volume growth and the category has now trebled admisisons since the foot and mouth outbreak in 2001.

The exceptional performance of gardens this year builds on strong growth in visitor numbers across the previous 18 years and gardens now exceed the average growth of 'all' attractions by over 100%.

Workplaces and country parks grew more modestly in 2019, but recorded record visitor numbers, while the visitor/ heritage centre category is yet to fully rebound from a dip in 2018.



Base: All attractions providing visits data for current and previous year (1,152)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (greyed out – please treat with caution)

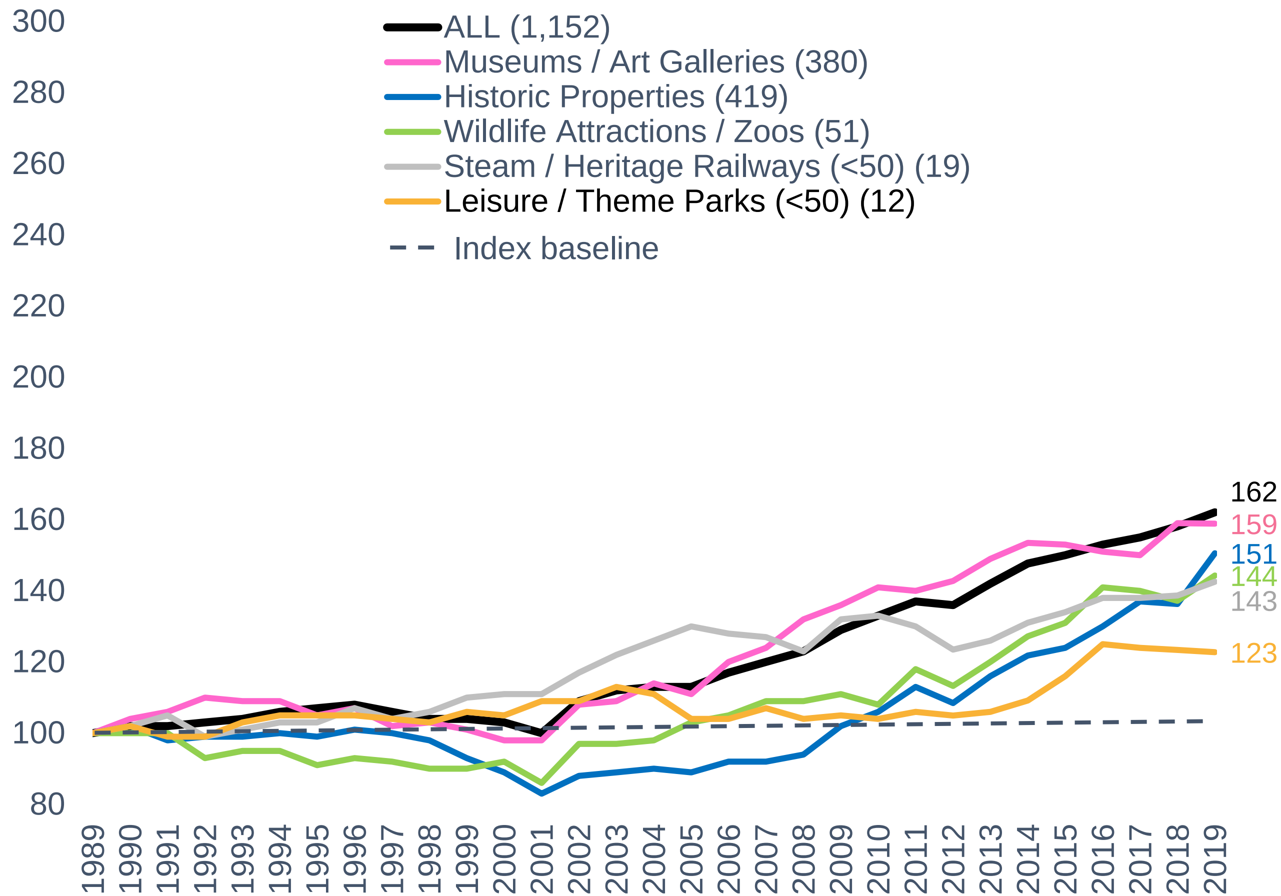
Index of Visits to Attractions: Sectors Underperforming vs. Market

This chart illustrates the attraction categories which have shown below average annual visit increases since 1989**. Across England, attraction as a whole ('all'), visits have increased by 62% during that time (index of 162).**

2017 and 2018 proved difficult years for historic properties, wildlife attractions and steam/ heritage railways, but 2019 saw a change in fortune, in particular for historic properties which increased from an index of +136 to +151.

Museums and art galleries dipped back below the 'all' attraction average in 2019 with an index of +159 falling just short of the all attraction average of +162.

2019 was the third consecutive year without growth for leisure/ theme parks.



Base: All attractions providing visits data for current and previous year (1,152)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (greyed out – please treat with caution)

Visitor Admission Trends 2019: By Region

Regional trends in visitor numbers varied significantly in 2019, from +7% in East Midlands, to -5% in the North West.

All but two regions exceeded their 2018 performance. The exceptions were the North West where visitor admissions dipped by -5% following a sharp increase in 2018 (+8%) and Yorkshire & the Humber (-2%) following two years of growth (2018: +2%, 2017: +7%).

All regions experiencing a decline in admissions from 2017 to 2018 rebounded strongly in 2019: North East (2019: +4% vs. 2018: -1%), East (2019: +6% vs. 2018: -1%) and South West (2019: +4% vs. 2018: -1%).

Visitor Admission Trends 2019: By Region

	2018/19 change (%)	2017/18 change (%)
Total Average	+3	+2
North West (110)	-5	+8
North East (78)	+4	-1
Yorks/Humber (102)	-2	+2
East Midlands (107)	+7	+1
West Midlands (101)	+1	+2
East (162)	+6	-1
London (77)	+3	+2
South East (216)	+4	*
South West (198)	+4	-1

Base: All attractions providing visits data for current and previous year (1,152)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* %change is under 1%, therefore not shown

Visitor Admission Trends 2019: By Admission Charge, Geographic Location & Size

The +3% average visitor admissions increase can be attributed to paid sites (+5%), as visits to free attractions remained consistent with 2018.

All types of area saw an increase, with rural (2019: +4% vs. 2018: -1%) and coastal (2019: +3% vs. 2018: <1%) overtaking urban (2019: +2% vs. 2018: +4%) growth again.

While larger sites continue to outperform smaller ones, the differential in performance was much smaller in 2019. In 2018 sites attracting under 200,000 visits saw a decline (20,000 visits or less: -4%, 20-50,000 visits: -1%, 50-200,000 visits: -2%). In 2019 all volume categories maintained or grew visit numbers, and sites with 20-50,000 visits (+2%) fared nearly as well, and 50-200,000 visits (+3%) just as well as the largest (200,000 visit) sites (+3%).

Visitor Admission Trends 2019: By Admission Charge, Geographic Location & Size

	2018/19 change (%)	2017/18 change (%)
Total Average	+3	+2
Free (394)	*	+4
Paid (758)	+5	*
Coastal (146)	+3	*
Rural (605)	+4	-1
Urban (401)	+2	+4
20,000 visits or less (478)	*	-4
20,001 – 50,000 visits (218)	+2	-1
50,001 – 200,000 visits (248)	+3	-2
Over 200,000 visits (208)	+3	+3

Base: All attractions providing visits data for current and previous year (1,152)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* %change is under 1%, therefore not shown

Visitor Admission Trends 2019: Paid & Free Attractions

Paid attractions managed to increase their visitor admissions by +5% in 2019, while Free attractions overall saw their admissions remain consistent year on year with 2018 figures. The charts below show the changes by attraction category split by free and paid attractions.

Visitor Admission Trends 2019: Free Attractions

Free Attractions	2018/19 change (%)	2017/18 change (%)
ALL FREE (394)	*	+4
Country Parks (26) <50	+2	*
Farms <10	(<10)	+6
Gardens <10	(<10)	(<10)
Historic Houses/Castles (16) <50	-8	-2
Other Historic Properties (23) <50	+4	+3
Leisure/Theme Parks <10	(<10)	(<10)
Museum/Art Galleries (229)	+1	+5
Steam/Heritage Railways <10	(<10)	(<10)
Visitor/Heritage Centres (36) <50	+1	-1
Wildlife Attractions/Zoos <10	(<10)	*
Workplaces <10	(<10)	(<10)
Places of Worship (26) <50	+3	+5
Other (11) <50	-1	*

Visitor Admission Trends 2019: Paid Attractions

Paid Attractions	2018/19 change (%)	2017/18 change (%)
ALL PAID (758)	+5	*
Country Parks <10	(<10)	(<10)
Farms (15) <50	+8	-2
Gardens (79)	+10	+1
Historic Houses/Castles (287)	+6	-1
Other Historic Properties (93)	+3	*
Leisure/Theme Parks (10) <50	-1	-2
Museum/Art Galleries (151)	-6	6
Steam/Heritage Railways (17) <50	+5	+1
Visitor/Heritage Centres (26) <50	+1	-5
Wildlife Attractions/Zoos (43) <50	+5	-2
Workplaces <10	(<10)	(<10)
Places of Worship <10	(<10)	(<10)
Other (21) <50	+2	-2

Base: All attractions providing visits data for current and previous year (1,152)
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 (greyed out – please treat with caution)
<10 Base size less than 10 (figure therefore omitted)

Visitor Admission Trends 2019: Other Regional Dimensions

The chart below shows the changes by region split by free and paid attractions, and area type.

Visitor Admission Trends 2019: Other Regional Dimensions

2018/19 change %	Free	Paid	Coastal	Rural	Urban
North West (110)	-11	+2	(<10)	+1 [<50]	-9
North East (78)	* [<50]	+8	+9 [<50]	+5 [<50]	+3 [<50]
Yorks / Humber (102)	-7 [<50]	+3	(<10)	-1	-4 [<50]
East Midlands (107)	+8 [<50]	+5	N/A	+6	+8 [<50]
West Midlands (101)	-4 [<50]	+6	N/A	4	* [<50]
East (162)	+3	+8	+5 [<50]	+5	+7 [<50]
London (77)	+3 [<50]	+2 [<50]	N/A	(<10)	*
South East (216)	-1	+7	+3 [<50]	+5	+5
South West (298)	+2 [<50]	+5	+2	+6	+5 [<50]
ALL ATTRACTIONS (1,152)	*	+5	+3	+4	+2

Base: All attractions providing visits data for current and previous year (1,152)
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)
[<10] Base size less than 10 (figure therefore omitted)

Visitor Admission Trends 2019: Child Visits Summary

The volume of children visiting attractions increased by +4% in 2019. However, the number of attractions for which children comprised a major part of their audience (over 30%) has reduced in the last couple of years, down from 27% in 2017 to 24% in 2019.

Furthermore, these child orientated sites continued to see visitor numbers contract (2019: -1%, 2018: -1%), in contrast with the growth (2019: +2%, 2018: +3%) at sites for which child visits accounted for less than 30% of their business.

The overall number of schoolchildren visiting attractions in 2019 reduced by 5% reverting to the downwards trend recorded from 2014-2017 before the single year of growth (+1%) in 2018.

Schoolchildren are now only a major audience (comprising over 30% of visitors) for 3% of attractions.

Change in child admissions by category

	2018/19 change (%)	2017/18 change (%)
Total Average	+3	+2
30% or less children (614)	+2	+3
Over 30% children (198)	-1	-1
30% or less schoolchildren (759)	+1	2
Over 30% schoolchildren (25) <50	+3	-7

Change in child admissions: change in number of…

	2018/19 change (%)	2017/18 change (%)
Total Average	+3	+2
Child admissions (500)	+4	-1
Schoolchildren admissions (524)	-5	+1

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

<50 Base size below 50 (greyed out – please treat with caution)

Visitor Admission Trends 2019: By Visitor Origin

The International Passenger Survey* (IPS) recorded an increase in tourists to the UK in 2019 of +1%, with holiday visits up by +3%. This supported a volume increase in overseas visits of +2% in 2019.

However, the proportion of sites reporting an increase (32%), decrease (32%) and no change (36%) in international visits was fairly evenly split, so less than a third of attractions benefited from this increase.

In contrast, there was a +2% volume increase in local/ day visits across all attractions. This was shared between a greater proportion of the market, with 42% of attractions reporting an increase in local/ day visits.

This growth comes despite the reported fall in domestic day trips of -12% in 2019**, suggesting that attractions won a greater share of day visits than in previous years.

% change in visits 2019

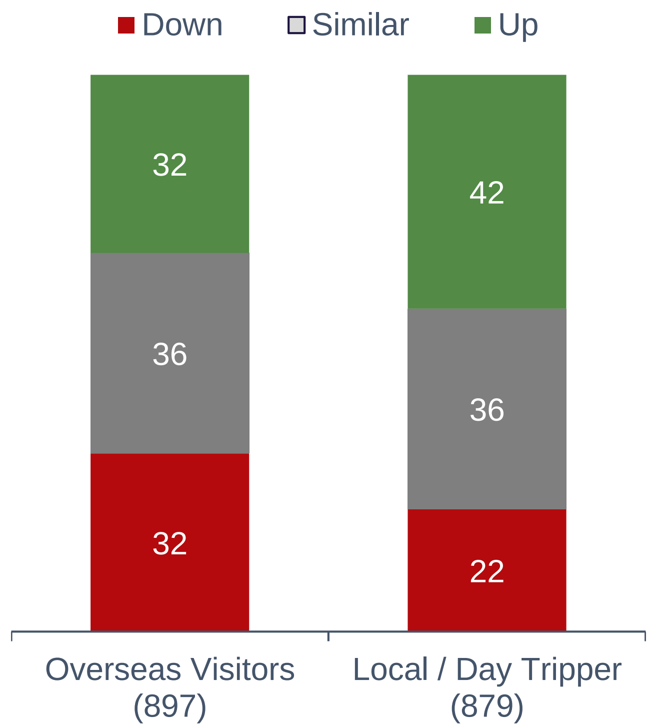
+2%
in visits

Overseas (528)

+2%
in visits

Local / Day (523)

Perceptions of visitor volume



Base: All answering overseas (897)/ local visitor questions (879) and providing visits data for current and previous year
*ONS International Passenger Survey (2019)/ **Day Visit Tourism Survey (2019)

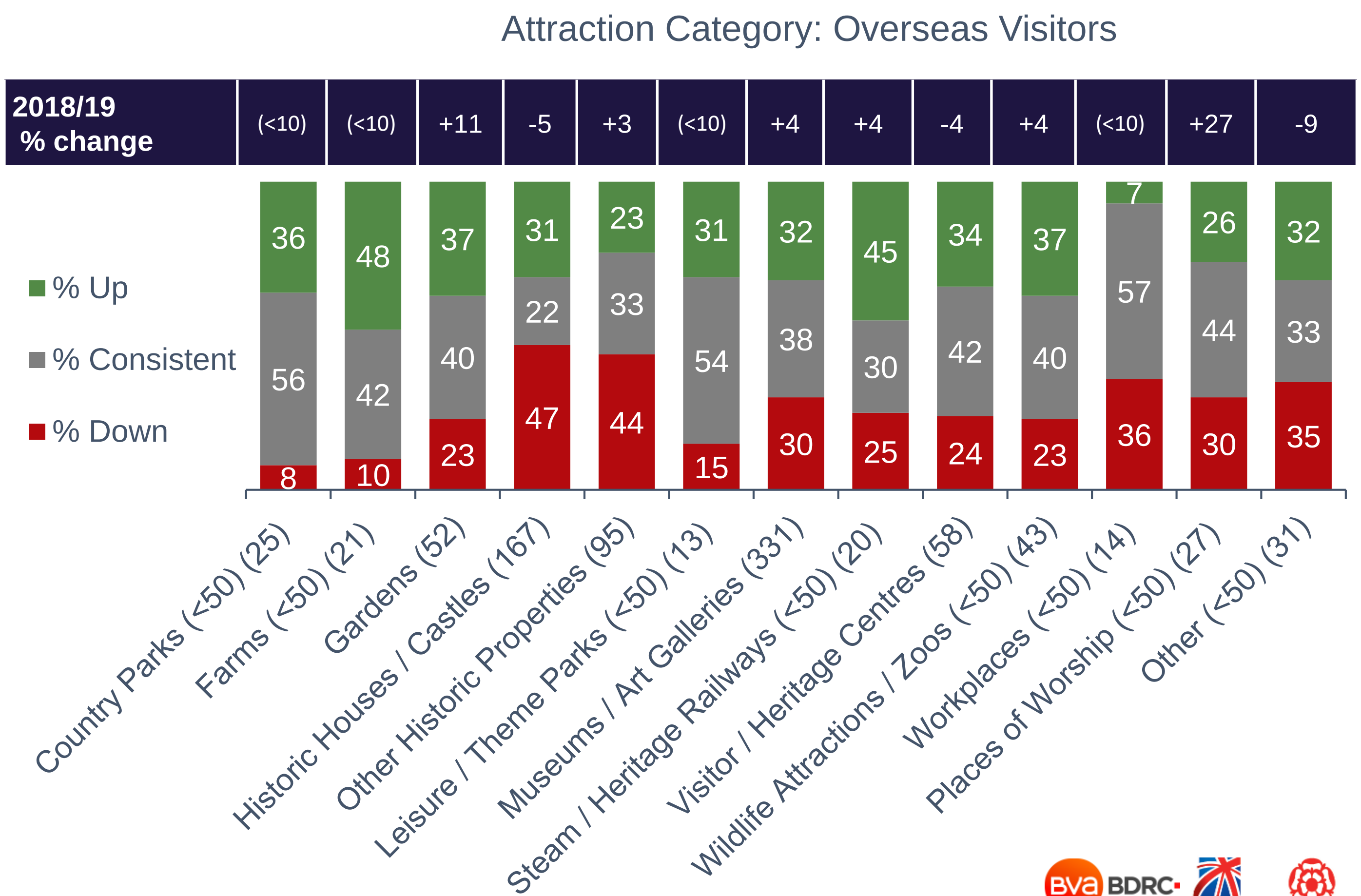
Visitor Admission Trends 2019: Overseas Visitors by Attraction Category

In recent years, a higher proportion of historic houses/ castles have seen a fall in overseas visits than those seeing a rise, but the overall volume of overseas visitors continued to grow. In 2019 this changed with the volume of overseas visits dropping by -5%.

Places of Worship (+27%) and Gardens (+11%) saw the biggest increases in overseas visitors in 2019, in both cases driven by particularly strong performance from a small number of attractions.

For Places of Worship this was linked with the 2019 #WishYouWereHere campaign which saw a number of cathedrals around the country opening up their spaces in new and creative ways.

Please note small the base sizes for Gardens and Places of Worship, so this result should be treated with caution.



Base: All answering overseas visitor question (897)
Base: All attractions providing overseas visits data for current and previous year (528)

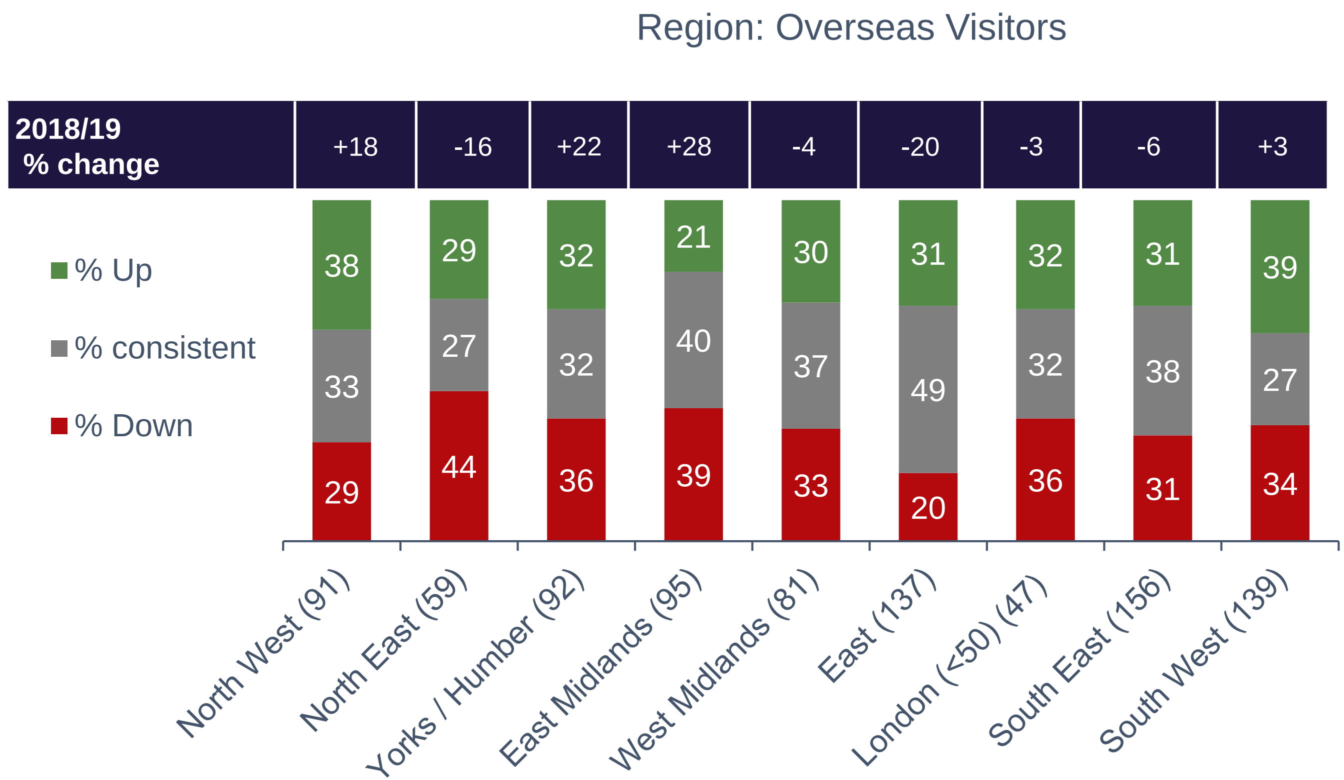
(<50) Base size below 50 (please treat with caution)

Visitor Admission Trends 2019: Overseas Visitors by Region

The North West region saw a further increase in overseas visitors in 2019 (+18%) building on the expansion of this market over the last couple of years (2018: +13%, 2017: +6%). This was not enough to drive overall admissions growth for the region as the total visit volume contracted by -5%.

Yorkshire & The Humber (+22%), East Midlands (+28%) also welcomed significantly more international visitors in 2019.

The sharp drop in overseas visits in the East is driven by a small number of large sites where visit numbers dropped following a successful year in 2018.



Base: All answering overseas visitor question (897)
Base: All attractions providing overseas visits data for current and previous year (528)

(<50) Base size below 50 (greyed out – please treat with caution)

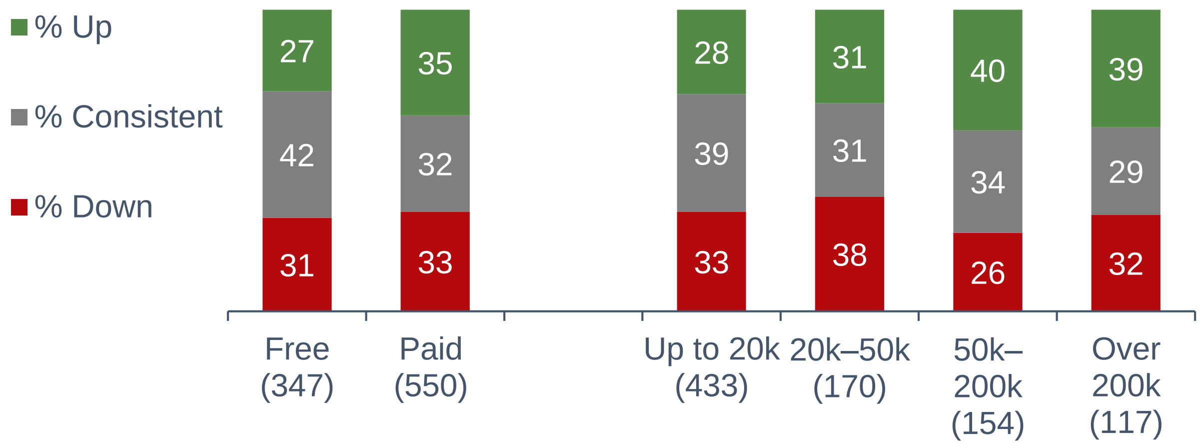
Visitor Admission Trends 2019: Overseas Visitors by Admission Charge & Size

The increase in overseas visits helped the performance of paid attractions in 2019 (+6%), but free sites captured a smaller share of this market and saw the volume of overseas visits fall (-2%).

Consistent with the past two years, large attractions (with over 200,000 visitors a year) grew their international audience (2019: +2%, 2018: +4%, 2017: +7%), while smaller attractions struggled to maintain previous overseas visitor levels.

Admission Charge and Size: Overseas Visitors
Admission charging / Number of visitors per annum

2018/19 % change	Free	Paid	Up to 20k	20k–50k	50k–200k	Over 200k
	-2	+6	-5	-10	*	+2



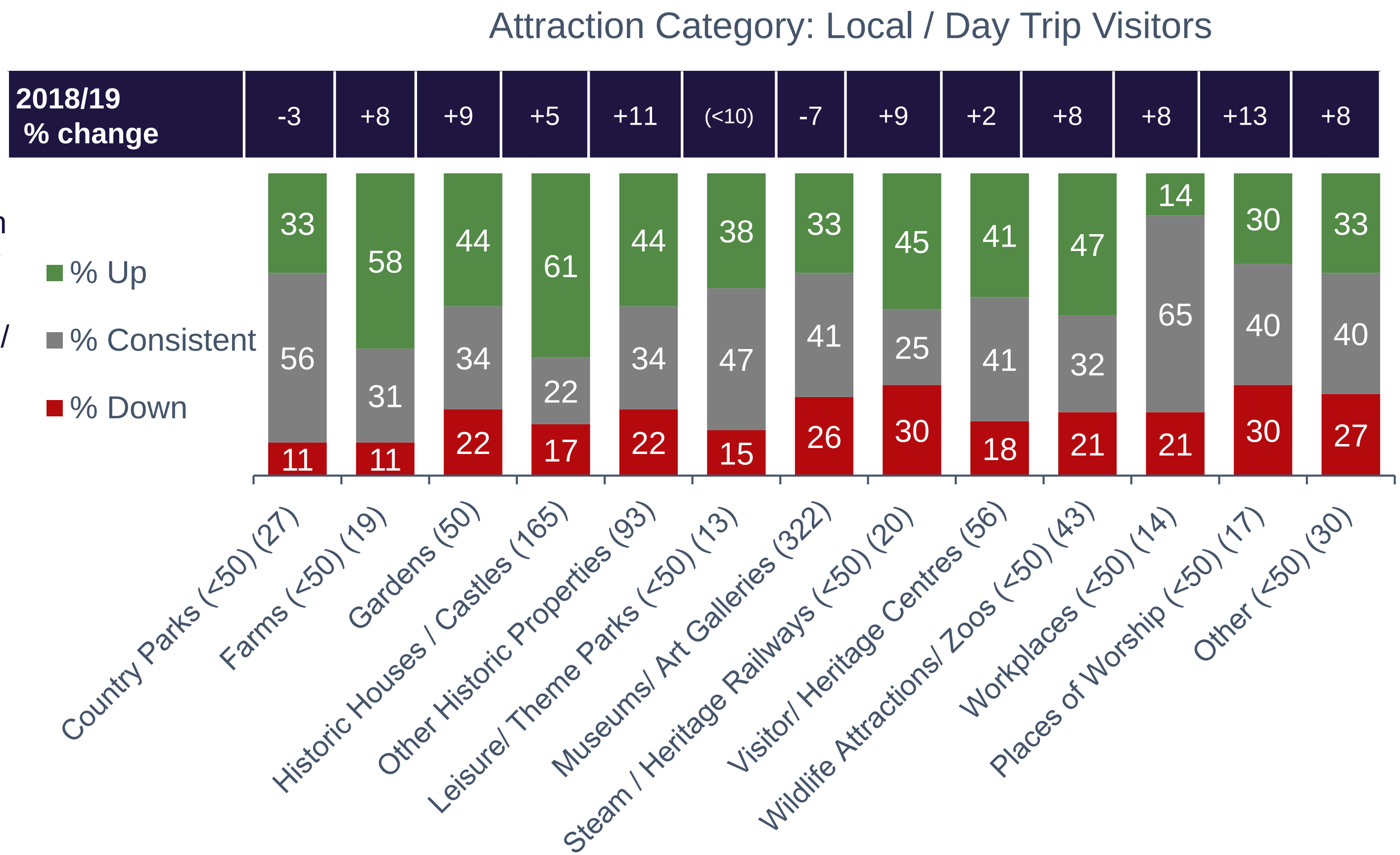
Base: All answering overseas visitor question (897)
Base: All attractions providing overseas visits data for current and previous year (528)

* % change is under 1%, therefore not shown

Visitor Admission Trends 2019: Local / Day Trip Visitors by Attraction Category

Most attraction types welcomed more locals/ day trippers in 2019, with growth typically being in the region of of +5-9%.

Only museums and galleries (-7%) and Country Parks (-3%) saw a decline in day trip volume and in both of these instances this was driven by a minority of attractions (with 11% of Country Parks and 26% of museums/ galleries reporting a decline compared with 2018).



Base: All answering local visitor question (879)
Base: All attractions providing day trip data for current and previous year (523)

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

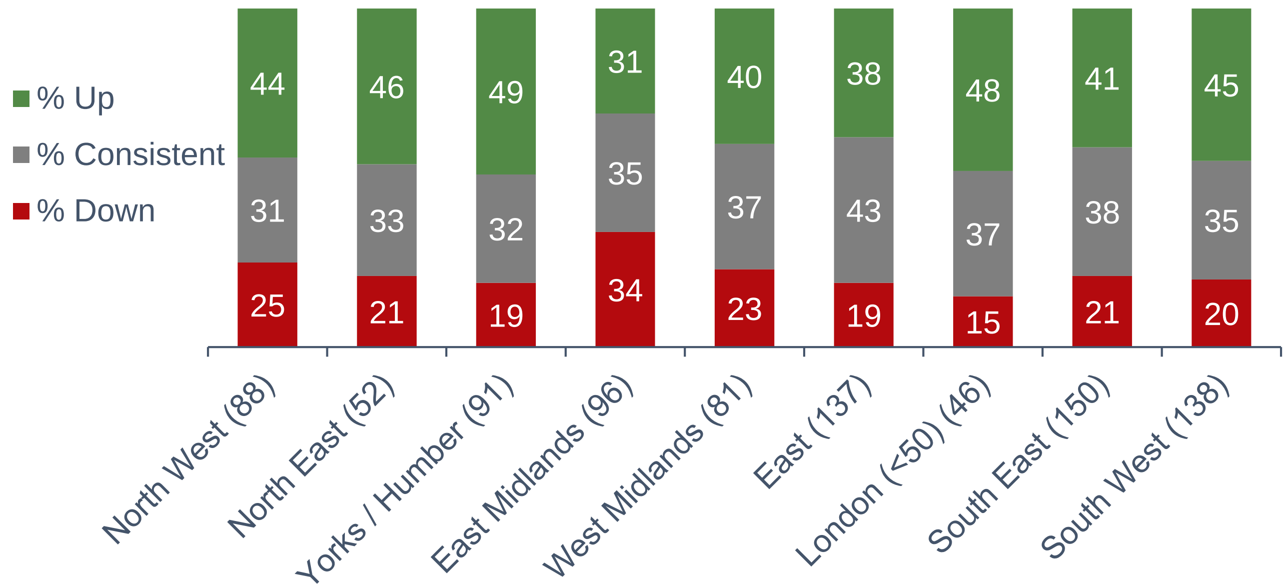
Visitor Admission Trends 2019: Local / Day Trip Visitors by Region

Southern regions reported the largest growth in day trips with visit volume increasing by +11% in the South East, +8% in the South West and +6% in London.

Although East Midlands was the only region where more sites reported a contraction than an expansion of the local market, day trip volume fell in three regions – East Midlands (-2%), North West (-6%) and West Midlands (-2%).

Region: Local Visitors

2018/19 % change	-6	+12	+3	-2	-2	*	+6	+11	+8



Base: All answering local visitor question (879)
Base: All attractions providing day trip data for current and previous year (523)

* % change is under 1%, therefore not shown
(<50) Base size below 50 (please treat with caution)

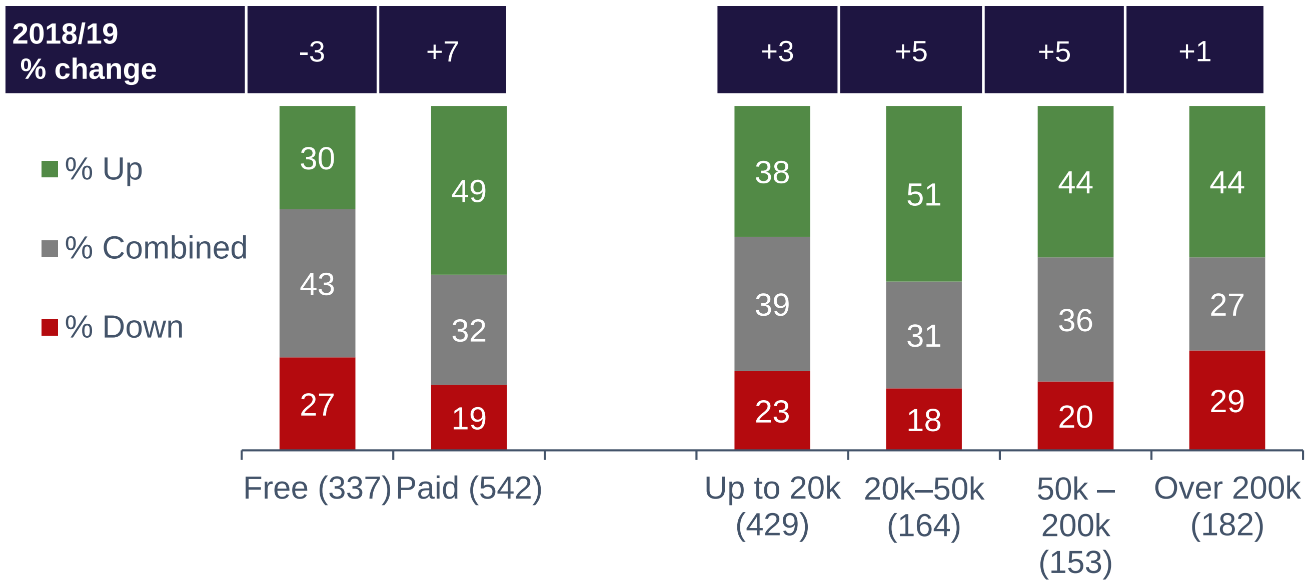
Visitor Admission Trends 2019: Local / Day Trip Visitors by Admission Charge & Size

The growth seen at Paid attractions in 2019 was driven by the local market (+7%) was well as by overseas visits (as detailed on slide 29).

Free attractions saw a decline in both of these audiences (-3% local, -2% overseas), maintaining a static position on overall 2018 admissions volume through growth of the domestic overnight stay market.

The increase in day trips to attractions was across the board in terms of attraction size, but less marked for larger attractions.

Admission Charge and Size : Local / Day Trip Visitors
Admission charging / Number of visitors per annum



Base: All answering local visitor question (879)
Base: All attractions providing day trip data for current and previous year (523)

Visitor Admission Trends 2019: Family Group Visitors by Attraction Category

Attractions naturally fall into three tiers of family engagement:

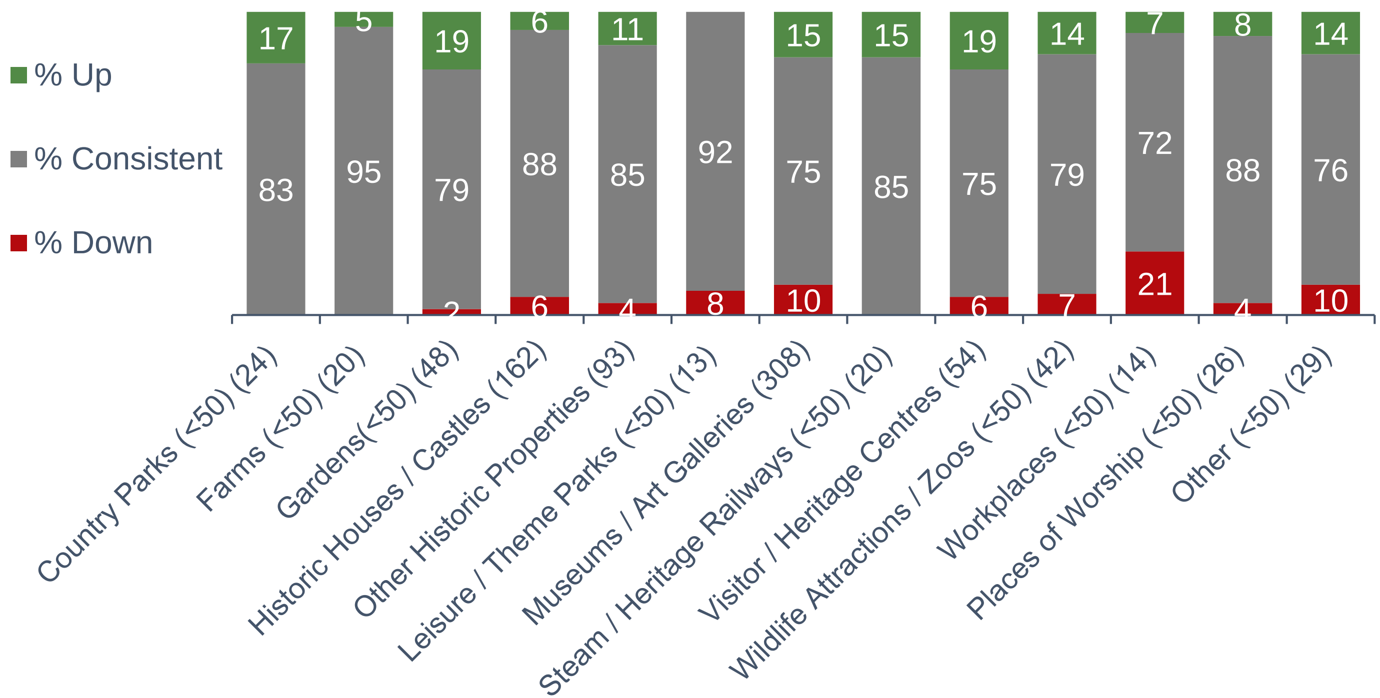
- High: Leisure/ theme parks (75%) and Farms (74%)
- Moderate: Country Parks (60%), Steam/ Heritage railways (59%) and Wildlife attractions (56%)
- Low: All other types, with penetration of family groups falling below 30% for most (with the exception of the varied ‘Other’ category at 38%).

The ‘High’ family engagement attractions were actually the least likely to see growth in family visits in 2019.

The categories making the biggest net gains (% up minus % down) were gardens (net +17%), country parks (net +17% and steam/ heritage railways (net +15%).

Attraction Category: Family Group Visitors

% visiting in a family group (mean share)	60 (<50)	74 (<50)	23 (<50)	25	27	75 (<50)	29	59 (<50)	27	56 (<50)	26 (<50)	17 (<50)	38 (<50)



Base: All answering family group question (853)
Base: All stating the proportion of visits by families (817)

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

Visitor Admission Trends 2019: Family Group Visitors by Region

Only a fifth (21%) of visits to London attractions were made by families, reflecting London's skew towards younger, pre-family age groups.

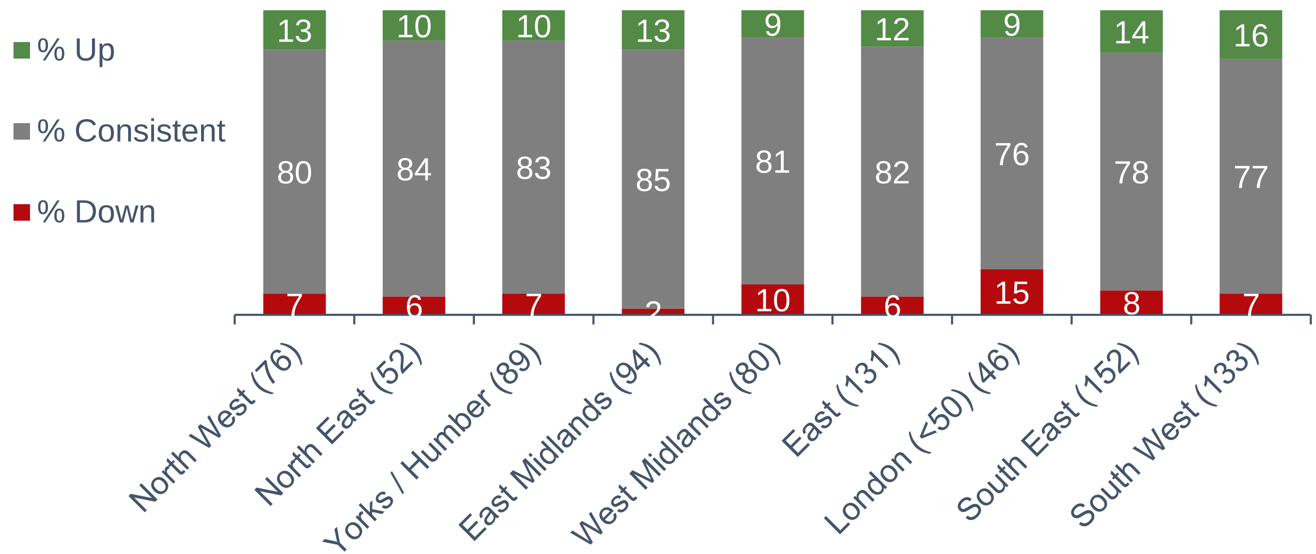
The proportion of family visits in other regions ranged between 29%-35%.

Family visits have fallen back in London and the West Midlands with the net position (% up minus % down) being -6% and -1% respectively.

Sites in other regions are more likely to report an increase in family visits.

Region: Family Group Visitors

	North West (76)	North East (52)	Yorks / Humber (89)	East Midlands (94)	West Midlands (80)	East (131)	London (<50) (46)	South East (152)	South West (133)
% of total visitors in a family group (mean share)	32	29	35	33	35	34	21 (<50)	33	30



Base: All answering family group question (853)
Base: All stating the proportion of visits by families (817)

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

Visitor Admission Trends 2019: Family Group Visitors by Admission Charge & Size

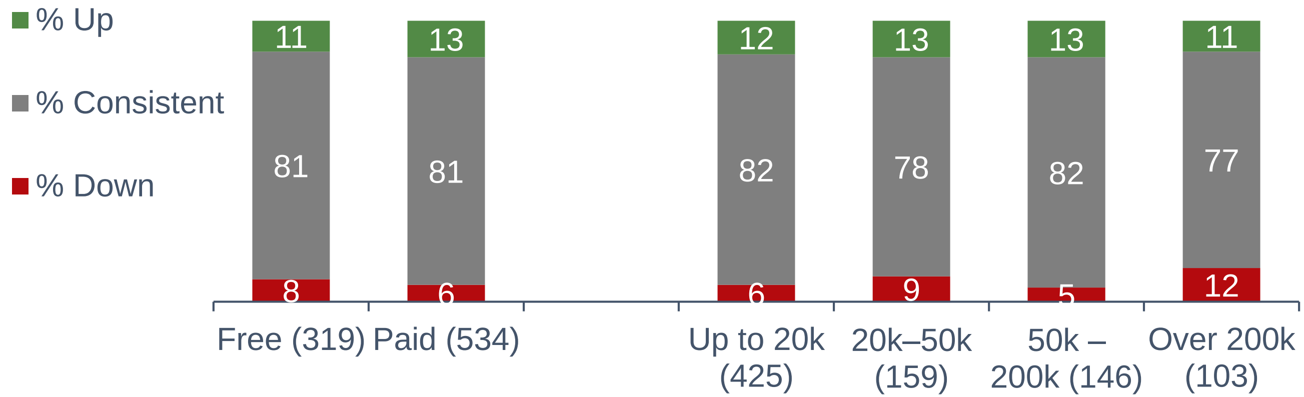
Consistent with previous years, larger attractions tend to attract more family visits – perhaps associated with better resources available for creating targeted family activities.

Free and Paid sites attract a similar proportion of family visits.

Admission Charge and Size: Family Group Visitors

Admission charging / Number of visitors per annum

% of visitors in a family group (mean share)	32	33	26	34	40	43



Base: All answering family group question (853)
Base: All stating the proportion of visits by families (817)

Admission Charge & Revenue Trends

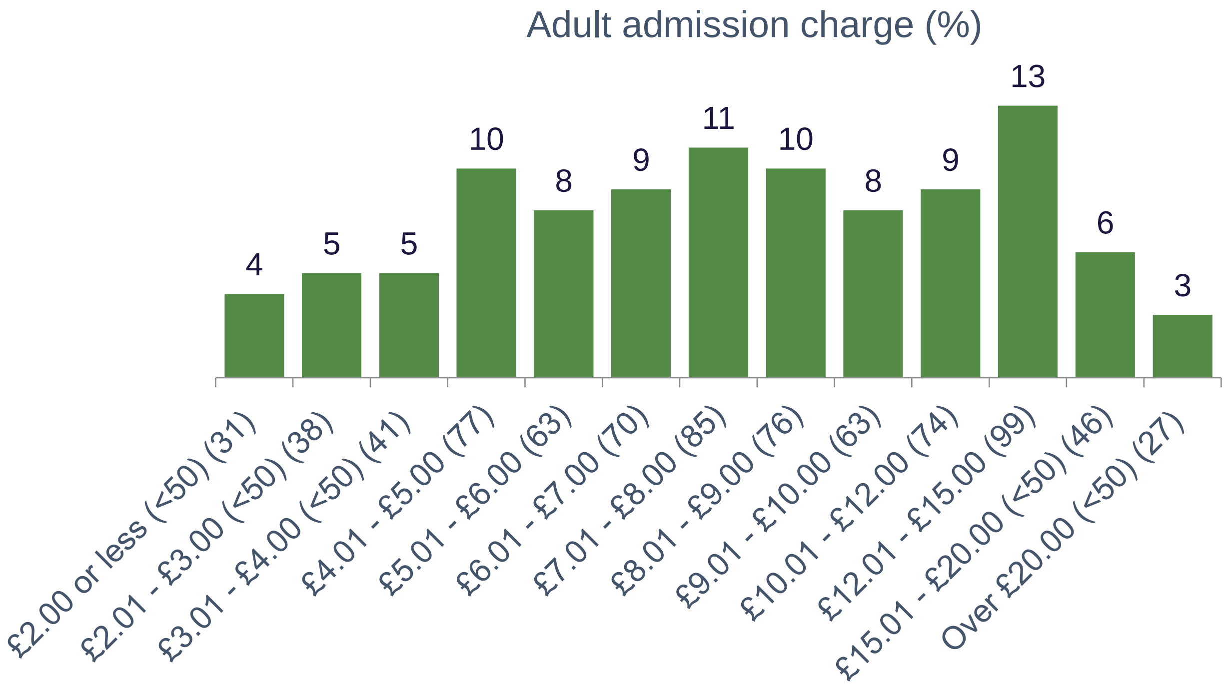
Adult Admission Charges 2019

Adult (high season) admission prices continued to increase in 2019, with an average adult entrance price of £8.99.

The downwards trend in attractions charging £5 or less for adult entry has now flattened out at just under a quarter of attractions (2019: 24%, 2018: 24%, 2017: 29%, 2016: 32%, 2015: 35%, 2014: 39%, 2013: 41%).

However, we continue to see an expansion in the number of sites charging over £10 for an adult admission ticket with 31% falling into this price band in 2019 (2018: 29%, 2017: 29%, 2016: 27%, 2015: 21%, 2014: 16%).

In 2019, the average child entry price was £5.42, consistent with 2018. However, child fees are increasing, 43% of Paid attractions now charging over £5 for child entry (2018: 36%, 2017: 36%, 2016: 32%).



Base: All answering admission charge question (790)

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

Adult Admission Charge Trends 2019: By Attraction Category

At an overall level adult admission fees increased by +5% in 2019, which is consistent with increases in recent years of between +4-6%. This increase exceeds the rate of inflation seen over the same period (2.6%, source: Bank of England, Consumer Price Inflation).

The proportion of paid attractions that charged for child entry increased slightly to 90%, up from 88% in 2018. Over the previous two years, child admission fees had increased at a higher rate than adult charges (2018: +8%, 2017: +7%) but 2019 saw inflation of child entry prices brought back in line with inflation of adult tickets, at +5%.

The change in adult admission charges and average entrance prices are shown by attraction category to the right, but should be treated with caution where there are low base sizes.

% change in adult admission charge

	Average 2019 charge	2018/19 change (%)	2017/18 change (%)
ALL PAID ATTRACTIONS (545)	£8.99	+5	+5
Country Parks <10	(<10)	(<10)	(<10)
Farms (17) <50	£9.83	+6	+1
Gardens (80)	£8.95	+4	+4
Historic Houses/Castles (299)	£10.20	+6	+6
Other Historic Properties (97)	£7.76	+7	+6
Leisure/Theme Parks (10) <50	£14.00	(<10)	(<10)
Museum/Art Galleries (162)	£6.16	+3	+6
Steam/Heritage Railways (18) <50	£9.15	*	+4
Visitor/Heritage Centres (27) <50	£8.58	+12	+5
Wildlife Attractions/Zoos (41) <50	£12.93	+1	+5
Workplaces (<10)	(<10)	(<10)	(<10)
Places of Worship (<10)	(<10)	(<10)	(<10)
Other (20) <50	£7.81	+14	*

Base: All answering admission charge question in 2019 (790)
Base: All answering admission charge question in 2018 and 2019 (545)

<50 Base size below 50 (greyed out – please treat with caution)
<10 Base size less than 10 (figure therefore omitted)
* %change is under 1%, therefore not shown

Adult Admission Charge Trends 2019: By Region

Adult entrance prices have risen across all regions with typical regional increase of +4-5%.

Entrance price inflation was higher in the South East (+6%), and in particular in London (+8%) where increases tripled the level of inflation in 2019 and 2018. The average adult entrance fee at paid attractions in London now stands at £12.71.

After London, entrance fees are highest in the other Southern regions and North West but remain below the £10 threshold (South West: £9.12, South East: £9.11, North West: £9.66).

Average adult entrance fees elsewhere in the country range from £7.51 to £8.73.

% change in adult admission charge

	Average 2019 charge	2018/19 change (%)	2017/18 change (%)
North West (62)	£9.66	+5	+7
North East (51)	£7.74	+4	+6
Yorks / Humber (70)	£7.51	+4	+4
East Midlands (62)	£8.52	+5	+4
West Midlands (83)	£.8.59	+4	+4
East (97)	£8.73	+5	+5
London (41) <50	£12.71	+8	+10
South East (159)	£9.11	+6	+5
South West (164)	£9.12	+5	+6

Base: All answering admission charge question in 2019 (790)
Base: All answering admission charge question in 2018 and 2019 (545)

<50 Base size below 50 (greyed out – please treat with caution)

Adult Admission Charge Trends 2019: By Attraction Size

There is 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.

Sites with 20,000 visitors or less per year charge £6.41 on average (up from £6.11), whilst the mean score for sites with over 200,000 visitors was £15.83 (up from £14.24).

However, admission inflation remained consistent across the different attraction sizes, all increasing by +5%.

% change in adult admission charge

	Average 2019 charge	2018/19 change (%)	2017/18 change (%)
20,000 or less p.a. (305)	£6.41	+5	+4
20,001 – 50,000 p.a. (160)	£7.64	+5	+6
50,001 – 100,000 p.a. (94)	£9.21	+5	+7
100,001 – 200,000 p.a. (88)	£11.94	+5	+5
Over 200,000 p.a. (119)	£.15.83	+5	+5

Base: All answering admission charge question in 2019 (790)
Base: All answering admission charge question in 2018 and 2019 (545)

Adult Admission Charge Trends 2019: By Geographic Location & Child Admissions

Historically rural attractions commanded the highest adult entrance fees, but the gap has been narrowing in recent years and average rural charges (£9.07) were finally overtaken by urban charges (£9.24) in 2019. This is the result of higher annual price increases at urban attractions over the last few years (urban 2018: +6%, 2017: +6%, 2016 +8% vs. rural: 2018: +5%, 2017: +3%, 2016: +5%).

Attractions with more than 30% child visits typically charge higher adult admission fees than those with less but this gap is also narrowing: an average price difference of £1.34 in 2019, compared with £2.47 in 2018.

Sites that attracted over 30% of their visitors from overseas still charged significantly more than those that didn't but applied a lower average increase. Due to a low base size this result should be treated with caution.

% change in adult admission charge

	Average 2019 charge	2018/19 change (%)	2017/18 change (%)
Coastal (116)	£8.22	+6	+4
Rural (476)	£9.07	+5	+5
Urban (198)	£9.24	+4	+6

% charge averages by child and overseas visitors

Attractions with:	Average 2019 charge	2018/19 change (%)	2017/18 change (%)
30% or fewer child visits (393)	£8.13	+5	+7
Over 30% child visits (125)	£9.47	+3	+5
30% or less overseas visits (494)	£8.08	+5	+6
Over 30% overseas visits (32) <50	£12.23	+2	+9

Base: All answering admission charge question in 2019 (790)
Base: All answering admission charge question in 2018 and 2019 (545)

<50 Base size below 50 (greyed out – please treat with caution)

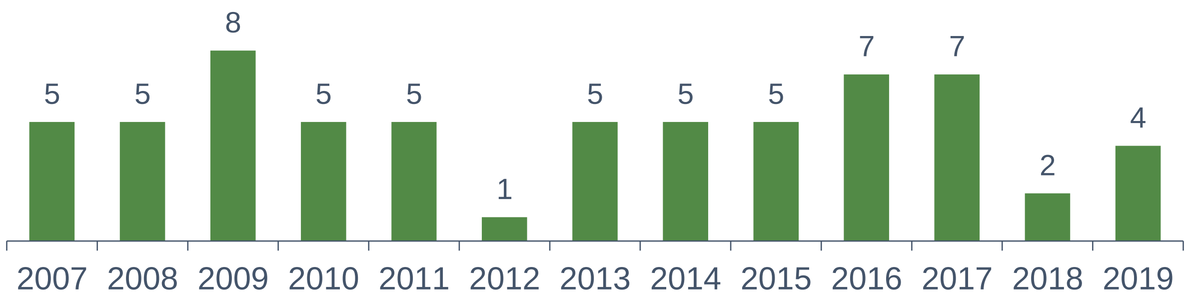
Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions increased by +4% in 2019, slightly higher than the increase in admissions, but lower than the historical average (+5%).

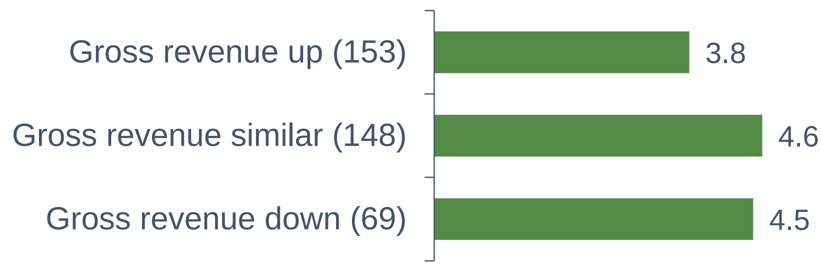
The increase was driven by just over a third (36%) of attractions that increased their revenue, a similar proportion to 2018 (35%), but lower than in 2017 and 2016 (both 45%) when gross sector revenue increased by +7%.

Increased revenue is often associated with higher increases in admission fees, but in 2019 this does not appear to be the case.

% change in gross revenue



% change adult admission charges 2019



Base: All answering revenue question (807)
Base: All charging attractions giving visits data and adult admission charge data (545)

Gross Revenue Trend 2019: By Attraction Category

All attraction categories increased their gross revenue in 2019, with the exception of Other Historic Properties which saw revenue contract by -4%.

Visitor/ Heritage Centres reported the highest increases in gross revenue (+10%).

The change in gross revenue is shown by attraction category to the right, but should be treated with caution where there are low base sizes.

% change in gross revenue

	2018/19 change (%)	2017/18 change (%)
Country Parks (24) [<50]	+4	*
Farms (16) [<50]	+8	+3
Gardens (45) [<50]	+3	+8
Historic Houses / Castles (151)	+7	*
Other Historic Properties (91)	-4	+4
Leisure / Theme Parks (11) [<50]	+2	*
Museums / Art Galleries (293)	+4	+2
Steam/Railways (18) [<50]	+1	+6
Visitor / Heritage Centres (57)	+10	+2
Wildlife Attractions / Zoos (39) [<50]	+2	+2
Workplaces (13) [<50]	+7	+5
Places of Worship (25) [<50]	+6	+2
Other (24) [<50]	+3	+4

* % change is under 1%, therefore not shown
[<50] Base size below 50 (greyed out – please treat with caution)

Base: All answering revenue question (807)

Gross Revenue Trend 2019: By Region

London and the South East saw the biggest gains in gross revenue, with average increases of +9% in both regions. This is associated with above average adult entrance price increases of +8% (London) and +6% (South East), as well as growth of the local audience (London: +6%, South East: +11%).

Attractions in Yorkshire & the Humber also outperformed the sector average, growing revenue by +7%, which is at least in part attributable to the additional admissions from overseas visitors (+22%).

The areas reporting below average (+4%) revenue gains were: East Midlands and East (0%), North West (+1%) and North East (+2%).

% change in gross revenue

	2018/19 change (%)	2017/18 change (%)
North West (73)	+1	+9
North East (47) <50	+2	*
Yorks / Humber (82)	+7	+2
East Midlands (91)	*	-2
West Midlands (66)	+5	-1
East (139)	*	+4
London (41) <50	+9	-1
South East (137)	+9	+3
South West (131)	+6	+1

* % change is under 1%, therefore not shown
<50 Base size below 50 (greyed out – please treat with caution)

Base: All answering revenue question (807)

Gross Revenue Trend 2019: By Admission Charge, Destination Type & Visit Volume

Paid sites increased their gross revenue by six times the level of free sites (+6% vs. +1%) in 2019, supported by above average growth in admissions (+5%).

From a geographical perspective it was coastal attractions that secured the highest revenue gains (+7%). While admissions growth was in line with the sector average, coastal attractions increased adult and child entrance prices by more than average.

Change in gross was similar to the sector average for most sizes of attraction, but higher (+10%) for sites with 50,000-100,000 visitors per annum. This was associated with more overseas and family visits in 2019.

% change in gross revenue: free / paid

	2018/19 change (%)	2017/18 change (%)
Free (308)	+1	+3
Paid (499)	+6	+2

% change in gross revenue: geographic location

	2018/19 change (%)	2017/18 change (%)
Coastal (114)	+7	*
Rural (446)	+3	+2
Urban (247)	+4	+3

% change in gross revenue: attractions size

	2018/19 change (%)	2017/18 change (%)
Up to 20k p.a. (401)	+4	+4
20k – 50k p.a. (146)	+5	+2
50k – 100k p.a. (80)	+10	+1
100k – 200k p.a. (64)	+4	+1
Over 200k p.a. (91)	+5	+3

* % change is under 1%, therefore not shown

Base: All answering revenue question (807)

Marketing & Communications

Website & Online Booking Facilities

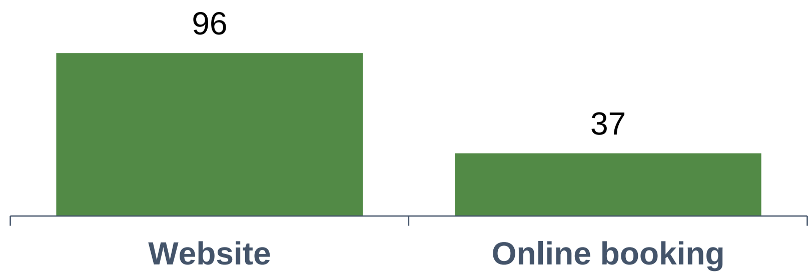
Use of websites is now nearly universal (99%) at sites attracting 10,000 visits per annum or more. Even at smaller sites 9 in 10 (91%) have a website.

Use of online booking facilities, however, has plateaued at 37%, with 2019 use remaining consistent with the previous two years. This result is likely to change substantially in 2020, with mass adoption of online booking as a means of managing social distancing during the COVID-19 pandemic.

In 2019, online booking was more likely to be offered by paid attractions (42%), but was still used free attractions, for example for event or temporary exhibition bookings (28%).

The ability to make online bookings also increases with site size (with 75% of sites with over 200,000 visitors using this technology).

% of sites with a website or online booking facilities in 2019



% of sites with a website or online booking facilities in 2019: by attraction size and free/paid

% offered	Website	Online Booking
Under 10k visits p.a.	91	13
10k - 20k visits p.a.	98	30
20k - 100k visits p.a.	98	45
100k - 200k visits p.a.	100	68
Over 200k visits p.a.	100	75
Free attractions	92	28
Paid attractions	98	42

Base: All answering digital communications question (969)

Other Digital Communications Offered

Facebook (87%) and Twitter (67%) continue to be the dominant social media platforms but their use by attractions has only increased marginally over the last couple of years. In contrast, use of Instagram/ Pinterest continues to rise, from just 22% of attractions in 2015 to 57% in 2019 and use of 'other' social media more than doubled between 2018 and 2019 from 9% to 20%.

Mobile technology offerings remain limited with only 17% of sites offering mobile apps and 8% mobile websites.

The suite of digital communications that attractions make use of tends to increase according to size.

Digital communication channel

	% offered in 2019	% offered in 2018	% offered in 2017
ANY	90	89	89
Facebook page	87	86	85
Twitter account	67	66	69
Instagram/ Pinterest	57	52	44
E-newsletter	51	47	49
YouTube	33	30	32
Online blogs	36	30	31
Other social media	20	9	9
Mobile apps	17	17	19
Mobile website	8	9	10

Number of visits per annum

% offered	20k or less	20k-100k	Over 100k
ANY	**84**	**96**	**98**
Facebook page	79	93	98
Twitter account	50	80	90
Instagram/ Pinterest	40	69	81
E-newsletter	36	58	76
YouTube	20	35	61
Online blogs	23	43	53
Other social media	14	21	29
Mobile apps	13	21	19
Mobile website	4	9	14

Base: All answering digital communications question (969)

Digital Communications Offered in 2019: By Attraction Category

Digital communication offered by attractions category

% offering	Country Parks (<50) (28)	Farms (<50) (22)	Gardens (56)	Historic houses / castles (179)	Other historic properties (104)	Leisure / theme parks (14)	Museums / art galleries (363)	Steam / heritage railways (<50) (20)	Visitor / heritage centres (62)	Wildlife / zoos (<50) (47)	Work-places (<50) (14)	Places of Worship (<50) (30)	Other (<50) (30)
ANY	89	100	95	95	85	100	89	100	82	100	71	77	90
Facebook	86	100	88	92	83	100	85	100	82	98	64	77	83
Twitter account	57	68	73	86	71	71	61	75	50	77	36	53	60
E-newsletter	25	59	55	75	51	43	47	45	31	55	29	33	33
Instagram/ Pinterest	21	68	75	82	62	79	46	60	42	70	43	40	50
YouTube	*	27	21	56	43	43	28	20	23	49	7	17	23
Online blogs	11	23	34	62	46	43	29	25	24	45	7	7	17
Mobile apps	*	*	7	48	38	14	6	*	6	9	7	7	*
Mobile website	11	5	13	4	10	7	8	*	*	19	7	7	13
Other social media	*	9	16	49	36	7	12	5	5	17	*	*	17
Website	100	100	98	99	94	100	93	100	95	98	100	93	100
Online booking	32	59	36	41	27	57	31	70	29	62	21	30	60

* % change is under 1%, therefore not shown
(<50) Base size below 50 (greyed out – please treat with caution)

Base: All answering digital communications question (969)

Impact of Digital Communications: Summary

Attractions using digital communications were more likely to grow visitor volume, with a +1% rise, compared with a -4% decrease amongst sites not using these platforms.

This impact carries through to gross revenue, with a +5% increase for those leveraging digital communications vs. +2% for those that don't.

Digital platforms are an essential tool for engaging families: sites using digital tools grew child admissions by +4%, whereas those who did not saw a -26% decline in child admissions.

Impact of digital communications, excluding website and online bookings, on business performance

2018/19 % change in…	Use digital communications	Do not use digital communications
Total visitor admissions	+1	-4
Local visits	+2	+1
Child admissions	+4	-26 (<50)
Schoolchildren visits	-5	-13
Gross revenue	+5	+2

Base: All answering digital communications question (969)

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

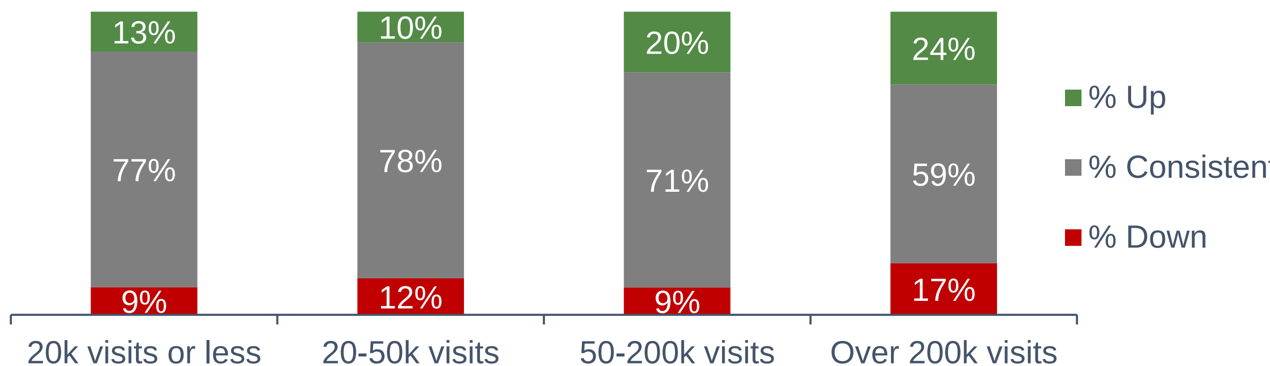
Marketing Expenditure Trend

Marketing expenditure remained constant year on year at nearly three quarters (74%) of attractions.

Larger attractions (with over 200,000 visits) are more likely to adjust their marketing budgets from one year to the next – both up (24% in 2019) and down (17% in 2019). The 2018 Visits to Visitor Attractions research found that larger attractions are more likely to use additional draws such as art installations and temporary exhibitions, which may explain the greater variability in marketing budgets.

Trend in marketing expenditure

Trend in marketing expenditure by size of attraction

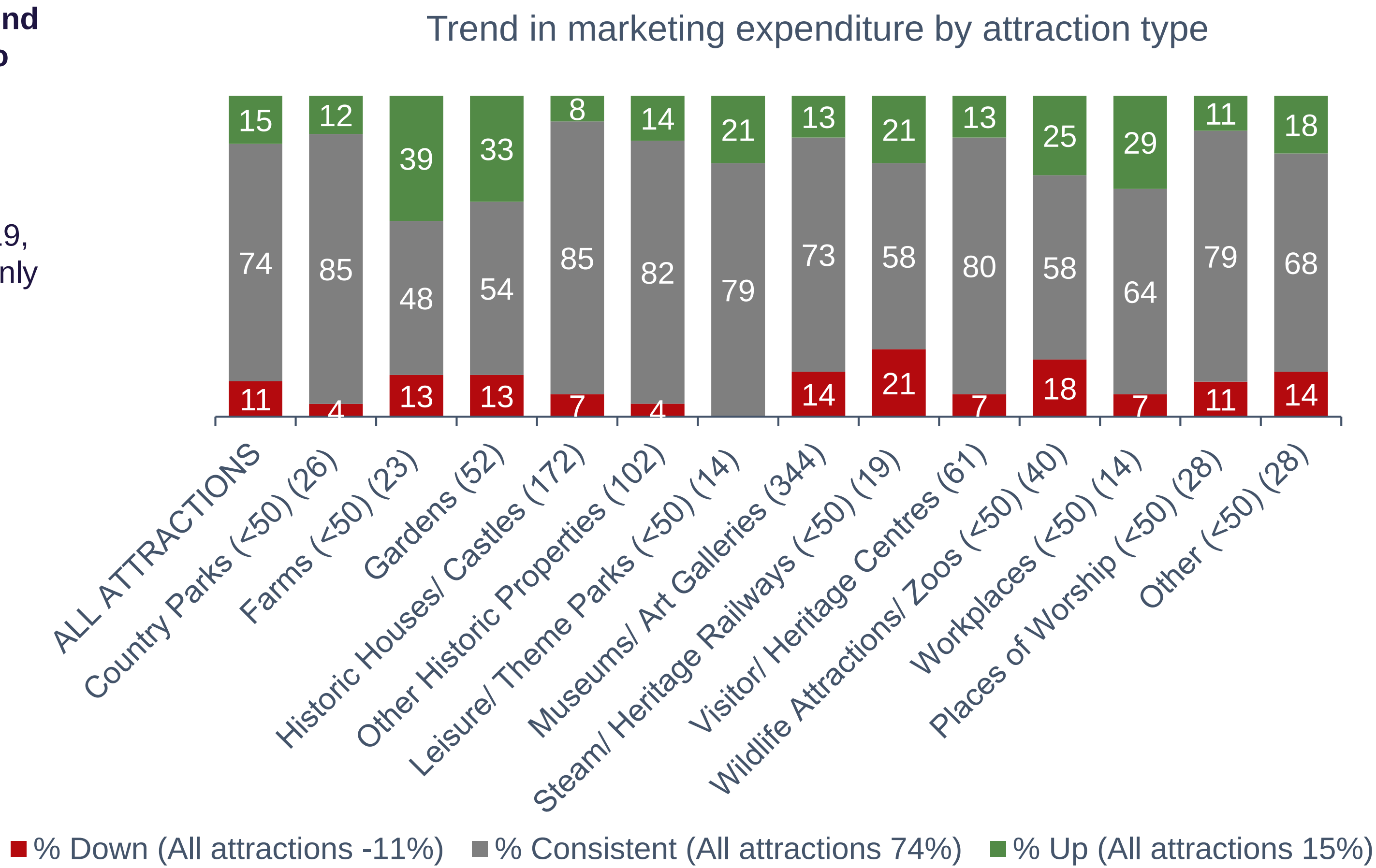


Base: All answering marketing question (923)

Marketing Expenditure Trends 2019: By Attraction Category

Farms and Leisure/ Theme Parks tend to make above average increases to marketing budgets, and this trend continued in 2019.

Garden attractions were more likely to increase marketing expenditure in 2019, with a third doing so, compared with only 13% who made marketing cuts.



Base: All answering marketing question (923)

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

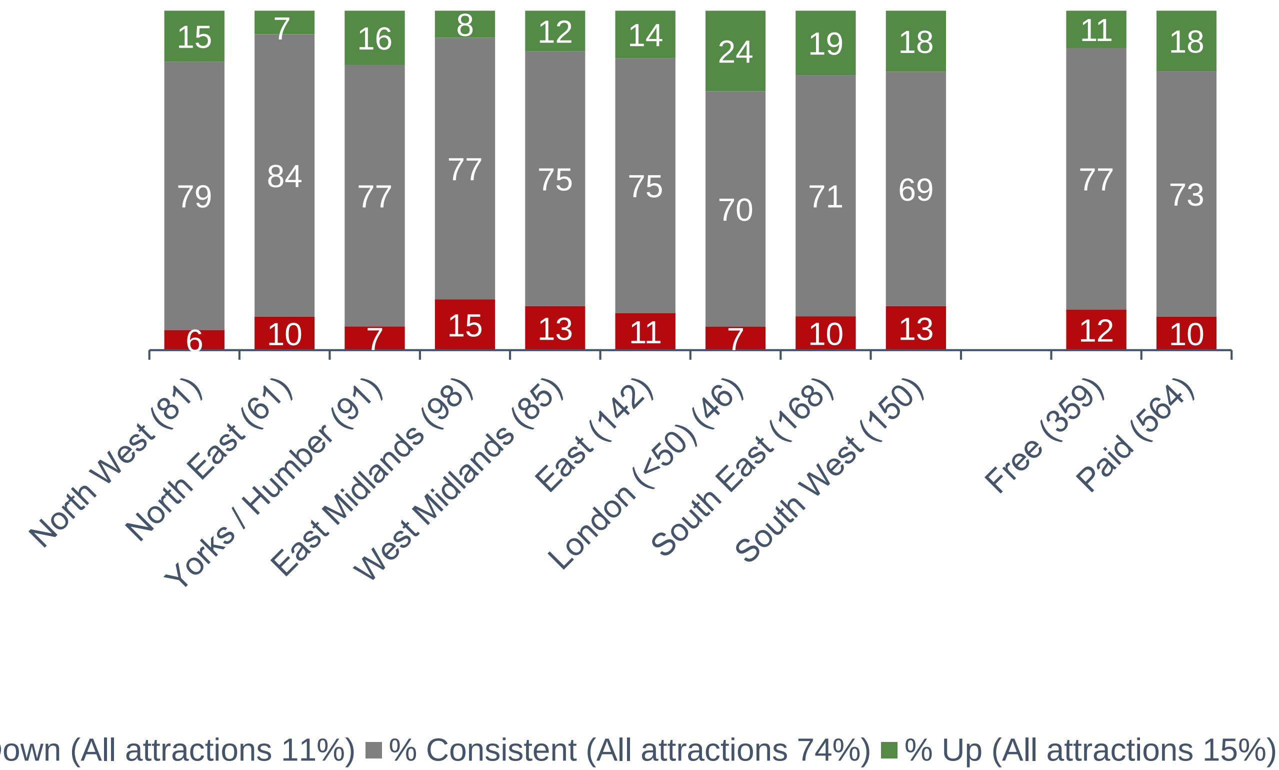
Marketing Expenditure Trends 2019: By Region & Admission Charge

Attractions based in the South were more likely to increase their marketing expenditure in 2019, in particular in London, where 24% of sites increasing marketing activity.

The North East and East and West Midlands reported a net reduction (% up minus % down) in marketing spend, with net change of -3%, -7% and -1% respectively.

Paid attractions (18%) are more likely than free sites (11%) to have increased their marketing spend – a trend that remains consistent with previous years. In 2019 Free attractions saw a net decrease in marketing spend (-1%).

Trend in marketing expenditure by region and free/ paid



Base: All answering marketing question (923)

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

Impact Of Marketing Expenditure: Summary

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

Those sites increasing their marketing spend grew admissions by +3%, compared with a 0% increase amongst those who cut budgets. Similarly revenue increased by 13% on average amongst those increasing their marketing budget, whereas sites cutting their marketing spend saw an average reduction in gross revenue of -1%.

Attractions that increased marketing spend saw a strong increase in local visits (+8%), while those that decreased marketing spend saw a decline (-4%). However, this pattern did not hold true for overseas visitors in 2019.

Impact changes in marketing spend on business performance

2018/ 19 % change in…	2019 marketing spend increased	2019 marketing spend decreased
Total visitor admissions	+3	*
Local visits	+8	-4
Overseas visits	-2	-1
Gross revenue	+13	-1

Base: All answering marketing question (923)

* % change is under 1%, therefore not shown

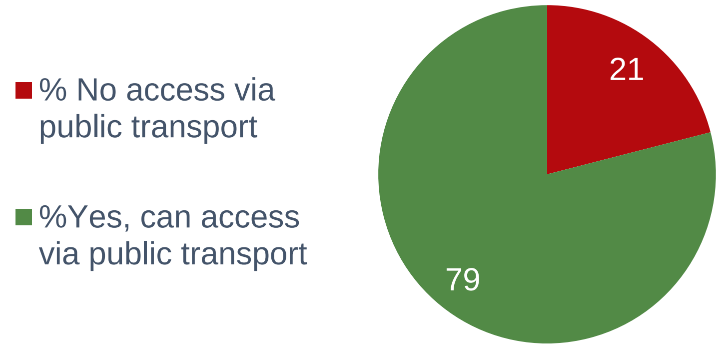
Access via public transport

Access to site via public transport in 2019

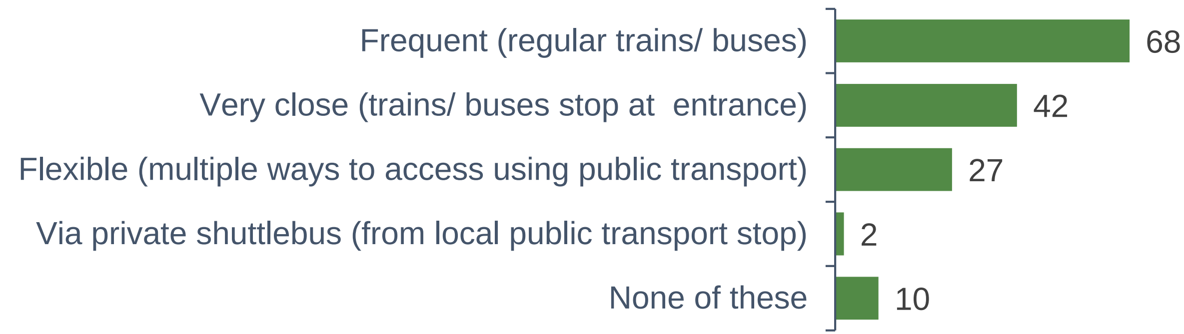
Over a fifth of attractions in England currently remain inaccessible to people needing to travel via public transport.

Around two thirds (68%) of accessible sites are supported by frequent trains/ buses (50% of all attractions) but these do not always stop at the attraction entrance. Buses/ trains only stop near the entrance of 33% of all attractions (42% of those accessible via public transport) so it is important to consider the onward journey for visitors with mobility needs.

Access to site via public transport by attraction type



Level of access via public transport of those who can access public transport (%)

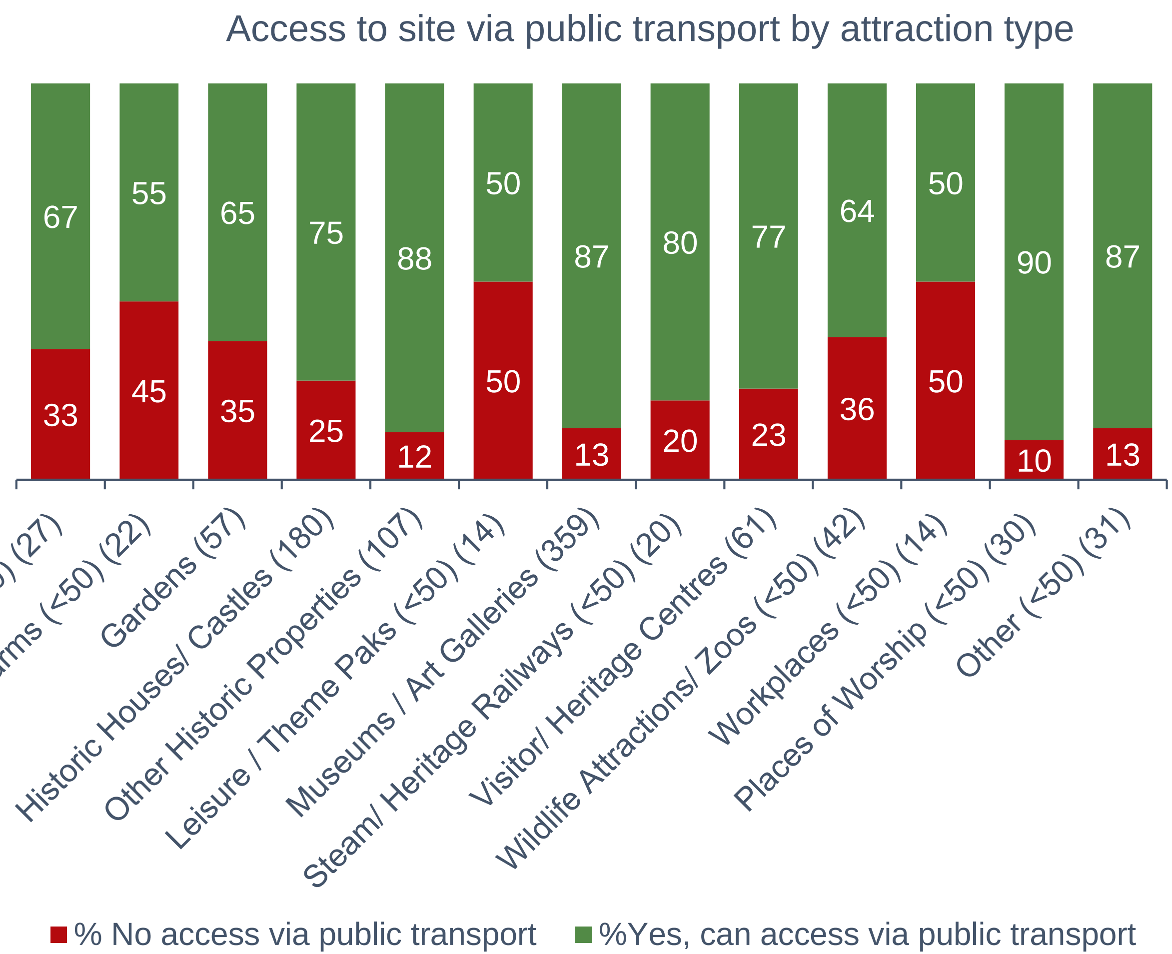


Base: All answering additional site access by public transport question (964)
Base: All sites accessible by public transport and answering the question (665)

Access to site via public transport in 2019: By attraction category

Other historic properties and museums and art galleries have the best access (88% and 87% of sites, respectively, can be reached via public transport).

However, as many as half for some categories of attraction, such as leisure/ theme parks and workplaces, are inaccessible by public transport. Please treat this finding with caution due to the low base sizes for these categories.



Base: All answering additional site access by public transport question (964)

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

Public transport access detail: By attraction category

Percentage of sites that can be accessed via public transport: by attraction category

Level of access via public transport (%)	Country Parks<50 (18)	Farms <50 (12)	Gardens <50 (37)	Historic houses / castles (67)	Other historic properties (63)	Leisure / theme parks <10	Museums / art galleries (310)	Steam / heritage railways <50 (16)	Visitor / heritage centres (47)	Wildlife / zoos <50 (27)	Work-place <10	Places of Worship <50 (27)	Other <50 (27)
Frequent (regular trains/ buses)	44%	50%	62%	72%	60%	(<10)	76%	56%	55%	48%	43%	74%	70%
Very close (trains/ buses stop at the site entrance)	56%	33%	38%	48%	33%	(<10)	44%	50%	36%	52%	57%	44%	37%
Via private shuttlebus (from local public transport stop)	*	*	*	1%	2%	(<10)	3%	6%	4%	*	*	*	*
Flexible (multiple ways to access using public transport)	6%	25%	16%	22%	25%	(<10)	33%	19%	19%	11%	29%	52%	19%
None of these	11%	*	5%	6%	16%	(<10)	7%	6%	15%	26%	14%	4%	19%

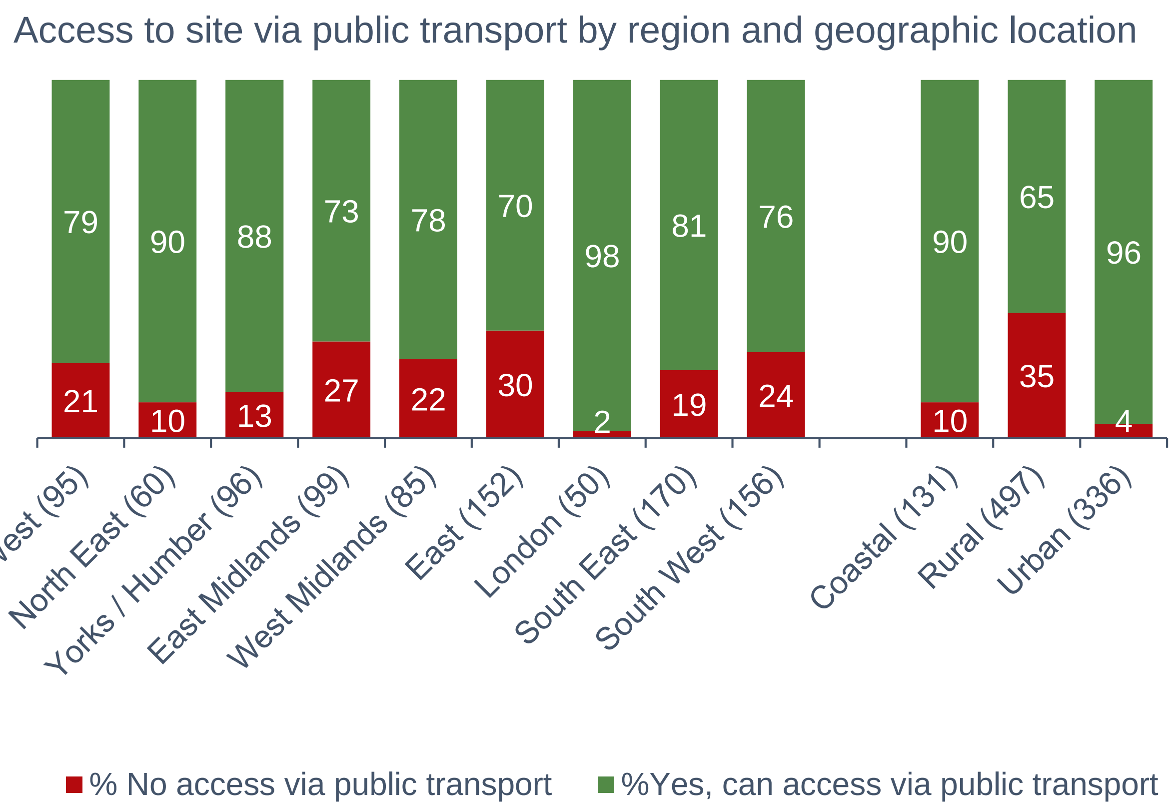
Base: All sites accessible by public transport and answering the question (665)

* %change is under 1%, therefore not shown
<50 Base size below 50 (greyed out – please treat with caution)
<10 Base size less than 10 (figure therefore omitted)

Access to site via public transport in 2019: By Region & geographic location

Rural areas have the lowest proportion of sites accessible via public transport (65%). The large majority of attractions in coastal and urban locations meanwhile are accessible via public transport (90% and 96% respectively).

The East of England has the lowest proportion of attractions that are easily accessible via public transport (70%) while unsurprisingly, London has the highest (98%).



Base: All answering additional site access by public transport question (964)

Public transport access detail: By Region & geographic location

Percentage of sites that can be accessed via public transport: by region and geographic location

Level of access via public transport (%)	North West (71)	North East <50 (41)	Yorks / Humber <50 (70)	East Midlands (63)	West Midlands (57)	East (97)	London <50 (40)	South East (124)	South West (101)	Coastal (96)	Rural (263)	Urban (306)
Frequent (regular trains/ buses)	79%	76%	67%	75%	61%	60%	90%	73%	50%	64%	57%	79%
Very close (trains/ buses stop at the attraction entrance)	46%	46%	43%	33%	58%	42%	55%	37%	37%	36%	36%	50%
Via private shuttlebus (from local public transport stop)	3%	2%	*	*	2%	4%	10%	1%	3%	2%	2%	3%
Flexible (multiple ways to access using public transport)	34%	32%	26%	16%	28%	20%	68%	23%	23%	27%	12%	40%
None of these	7%	12%	11%	6%	5%	8%	5%	7%	19%	13%	16%	3%

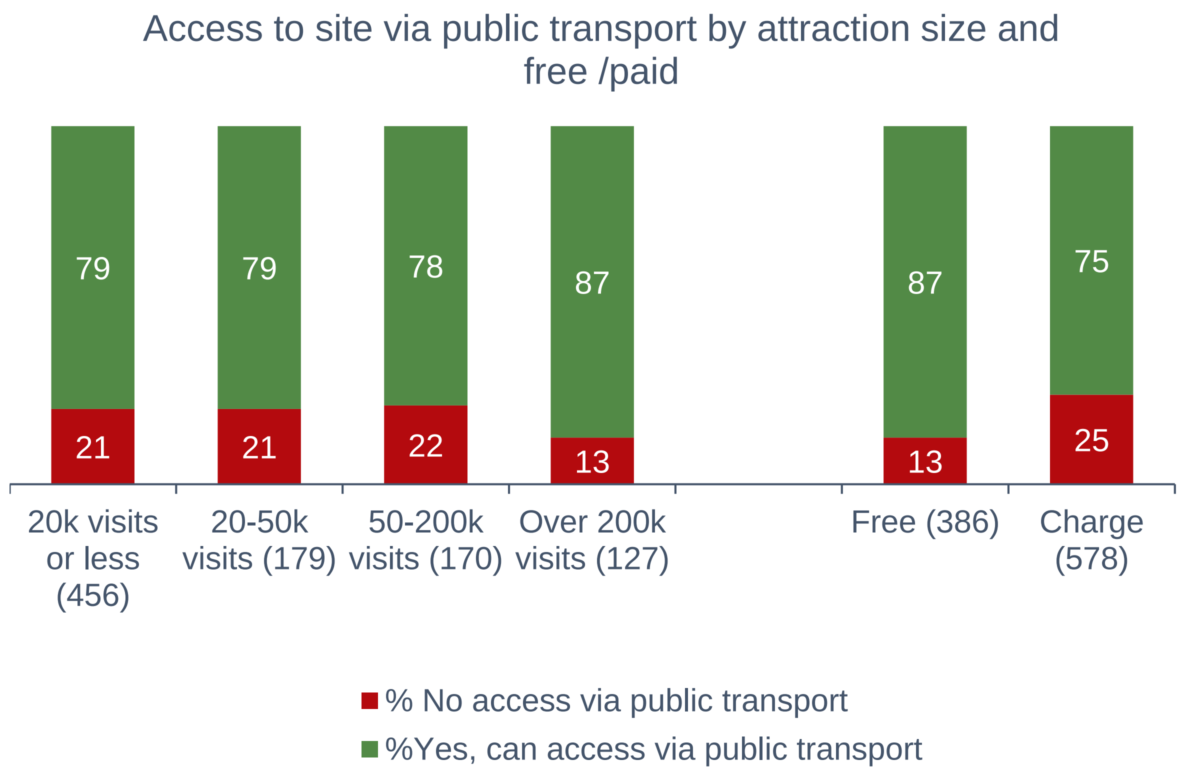
* %change is under 1%, therefore not shown
<50 Base size below 50 (greyed out – please treat with caution)

Base: All sites accessible by public transport and answering the question (665)

Access to site via public transport in 2019: By visitor volume & free/charge

Sites attracting over 200,000 visitors are more likely to be accessible via public transport (87%). In contrast, only 79% of smaller sites are easily accessible via public transport.

Free attractions are more likely to be accessible via public transport (87%) than those that charge for entry (75%).



Base: All answering additional site access by public transport question (964)

Public transport access detail: By visitor volume & free/charge

The table below shows the percentage of sites that can be accessed via public transport, by attraction size and admission type.

Larger attractions with over 200,000 visits have higher levels (80%) of frequent access via public transport (i.e. regular trains / buses). In contrast only 65% of attractions with 20,000 visitors or less benefit from frequent public transport links.

Percentage of sites that can be accessed via public transport: by attraction size and admission type

Level of access via public transport (%)	20k visits or less (321)	20-50k visits (111)	50-200k visits (111)	Over 200k visits (108)	Free (329)	Charge (336)
Frequent (regular trains/ buses)	65%	68%	65%	80%	72%	64%
Very close (trains/ buses stop at the attraction entrance)	37%	48%	46%	48%	43%	42%
Via private shuttlebus (from local public transport stop)	2%	1%	1%	6%	3%	2%
Flexible (multiple ways to access the site using public transport)	23%	30%	26%	37%	30%	24%
None of these	10%	7%	13%	6%	8%	11%

Base: All sites accessible by public transport and answering the question (665)

Employment Trends

Overall Employment Trends

In 2019, 83% of attractions employed permanent staff, 65% employed seasonal staff and 87% used unpaid volunteers.

Staffing levels within the attractions sector continued to expand from 2018 to 2019. However, this expansion slowed across all staff types, as shown by the net growth figures below:

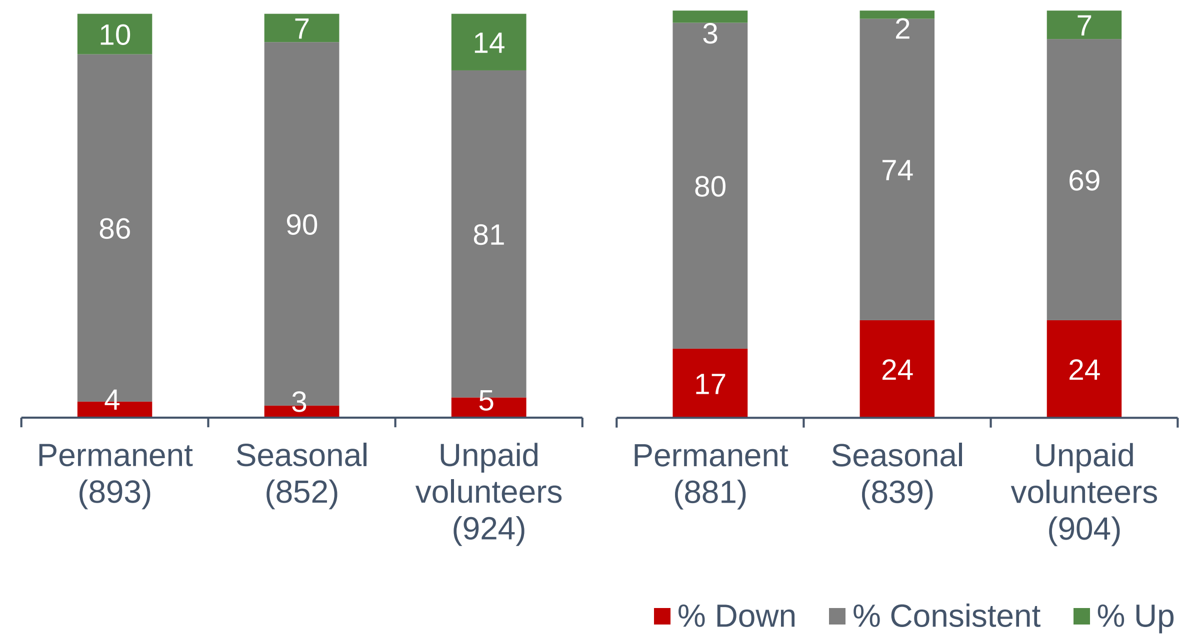
- Permanent staff: 2019 +6%, 2018 +9%, 2017 +8%
- Seasonal staff: 2019 +4%, 2018 +7%, 2017 +8%
- Unpaid volunteers: 2019 +9%, 2018 +16%, 2017 +16%

Expectation in recent years has been for this growth in staffing levels to continue. However, in 2019 this changed, with all types of staff anticipated to reduce in 2020. The survey was completed by most sites during the COVID-19 pandemic which is likely to be impacting these results.

Change in employees since 2018

Anticipated change in employees in 2020

Net (% up minus % down)	+6%	+4%	+9%	-14%	-22%	-17%



Base: All answering employment questions (c.881)

Employment Trends: Permanent Employees Summary (2018 - 2019)

More sites increased the number of permanent staff than reduced across all attraction categories, admission type and size.

Just one additional/ lost member of staff counts as an increase/ decrease regardless of the size of attraction, so it follows that change is more likely at larger attractions. In 2019 the net increase was +15 for sites with over 200,000 visitors (vs. all attractions average of +6).

Change in employees from 2018 to 2019

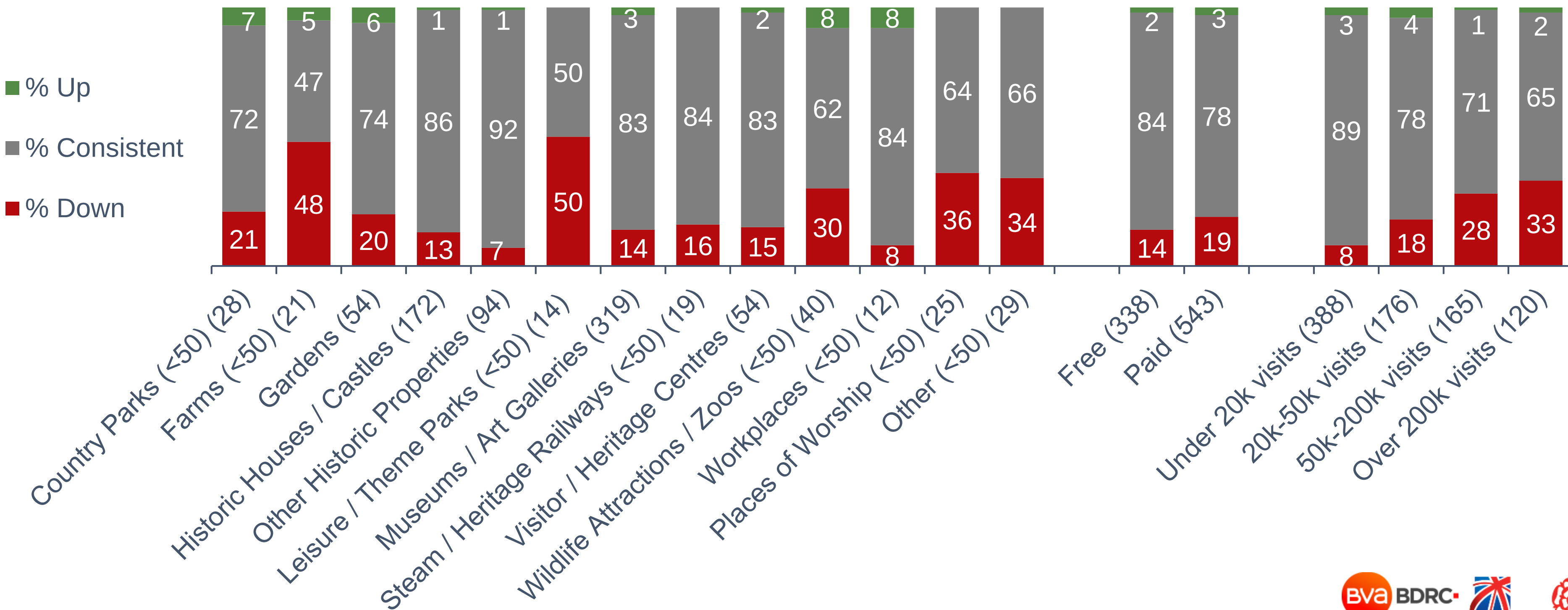
Base: All answering employment questions - permanent (893)

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

Employment Trends: Permanent Employees Summary (2020 Predictions)

There is widespread expectation for permanent staffing levels to reduce, regardless of the category, type of admission or visitor volume. Anticipation of staff losses is higher at larger attractions, where 33% of sites expect a reduction in permanent staff, compared to only 2% expecting this to increase. There are substantial differences by attraction category, but these findings should be treated with caution due to low base sizes.

Anticipated change in employees in 2020



Base: All answering employment questions - permanent (891)

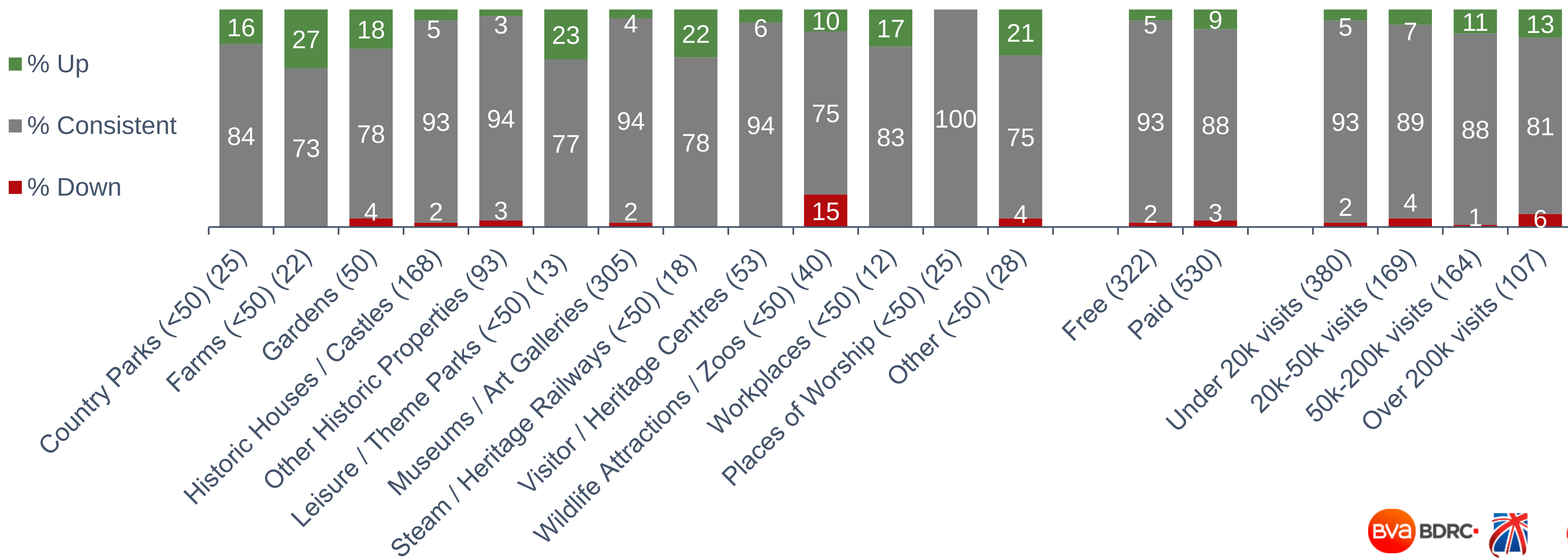
(<50) Base size below 50 (please treat with caution)

Employment Trends: Seasonal Employees Summary (2018 - 2019)

Overall, the increases reported in seasonal staff mirrors that of permanent employees, with most attraction types increasing the number of seasonal staff in 2019. The exception to this is wildlife attractions, which were more likely to reduce (15%), rather than increase (10%), seasonal staff in 2019. There may be an element of switching from seasonal to permanent staff and vice versa at play here.

Change in employees from 2018 to 2019

	% any Seasonal staff in 2019
Country Parks (<50) (25)	68 <50
Farms (<50) (22)	95 <50
Gardens (50)	82
Historic Houses / Castles (168)	91
Other Historic Properties (93)	76
Leisure / Theme Parks (<50) (13)	92 <50
Museums / Art Galleries (305)	43
Steam / Heritage Railways (<50) (18)	44 <50
Visitor / Heritage Centres (53)	49
Wildlife Attractions / Zoos (<50) (40)	82 <50
Workplaces (<50) (12)	50 <50
Places of Worship (<50) (25)	36 <50
Other (<50) (28)	75 <50
Free (322)	44
Paid (530)	77
Under 20k visits (380)	50
20k-50k visits (169)	75
50k-200k visits (164)	76
Over 200k visits (107)	89

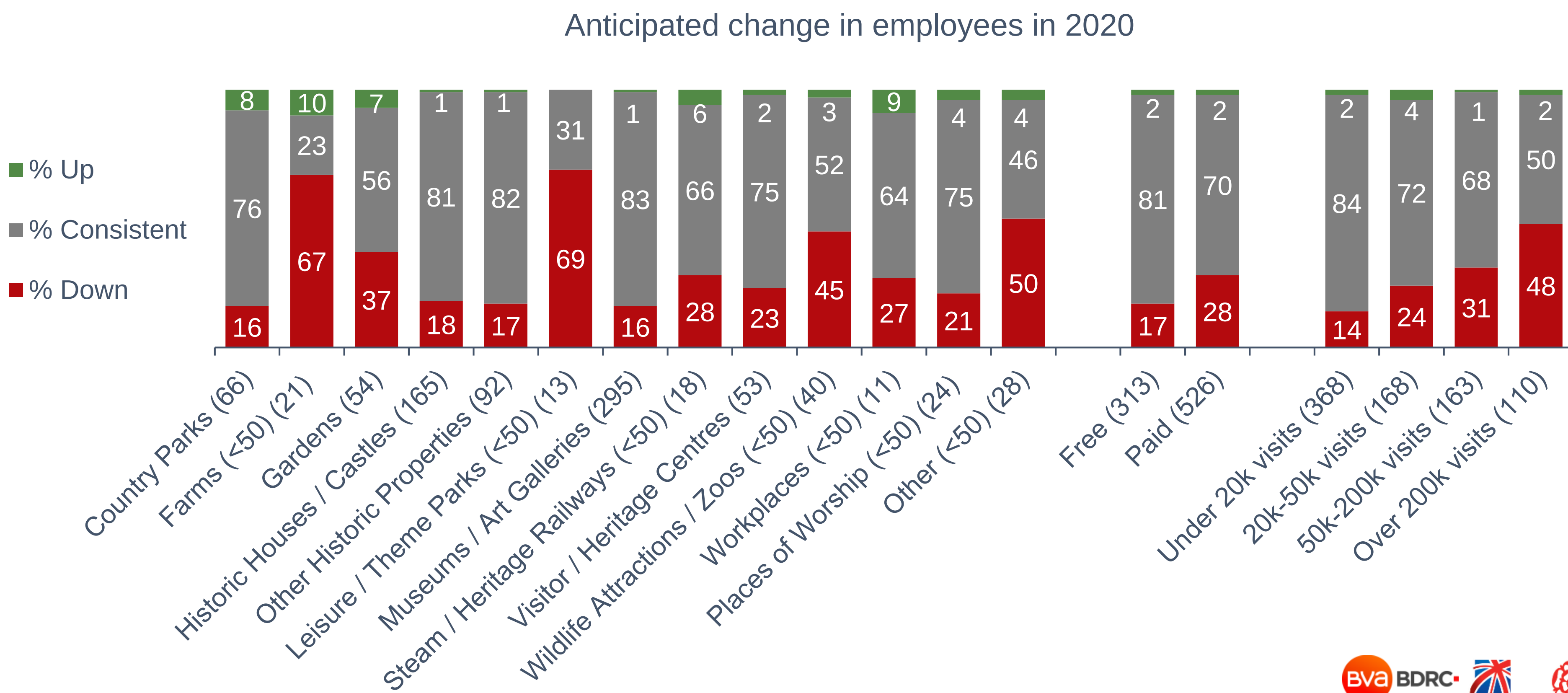


Base: All answering employment questions - seasonal (852)

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

Employment Trends: Seasonal Employees Summary (2020 Predictions)

The anticipated reduction in staff is even more marked for seasonal than permanent staff, particularly at small (with less than 20,000 visitors per annum) or very large attractions (with 200,000 visitors or more), and those charging an entrance fee.



Base: All answering employment questions - seasonal (839)

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

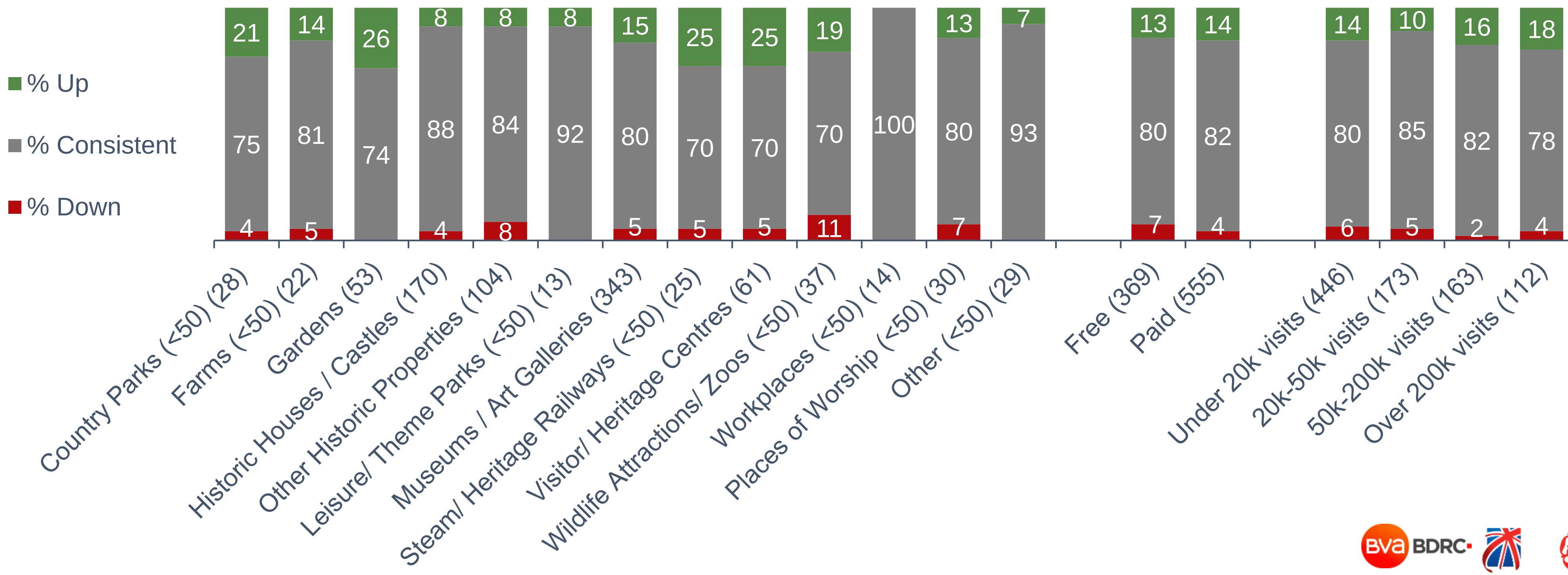
Employment Trends: Unpaid Volunteers Summary (2018 - 2019)

87% of all attractions use unpaid volunteers; this rises to 90% at sites attracting fewer than 50,000 visits a year.

Use of Unpaid Volunteers continued to grow in 2019, particularly at gardens, visitor/ heritage centres and steam/ heritage railways.

Change in employees from 2018 to 2019

% any Unpaid Volunteers in 2019	79 <50	64 <50	77	92	86	23 <50	94	95 <50	92	89 <50	43 <50	100 <50	48 <50		91	85		90	90	84	80



Base: All answering employment questions – unpaid volunteers (924)

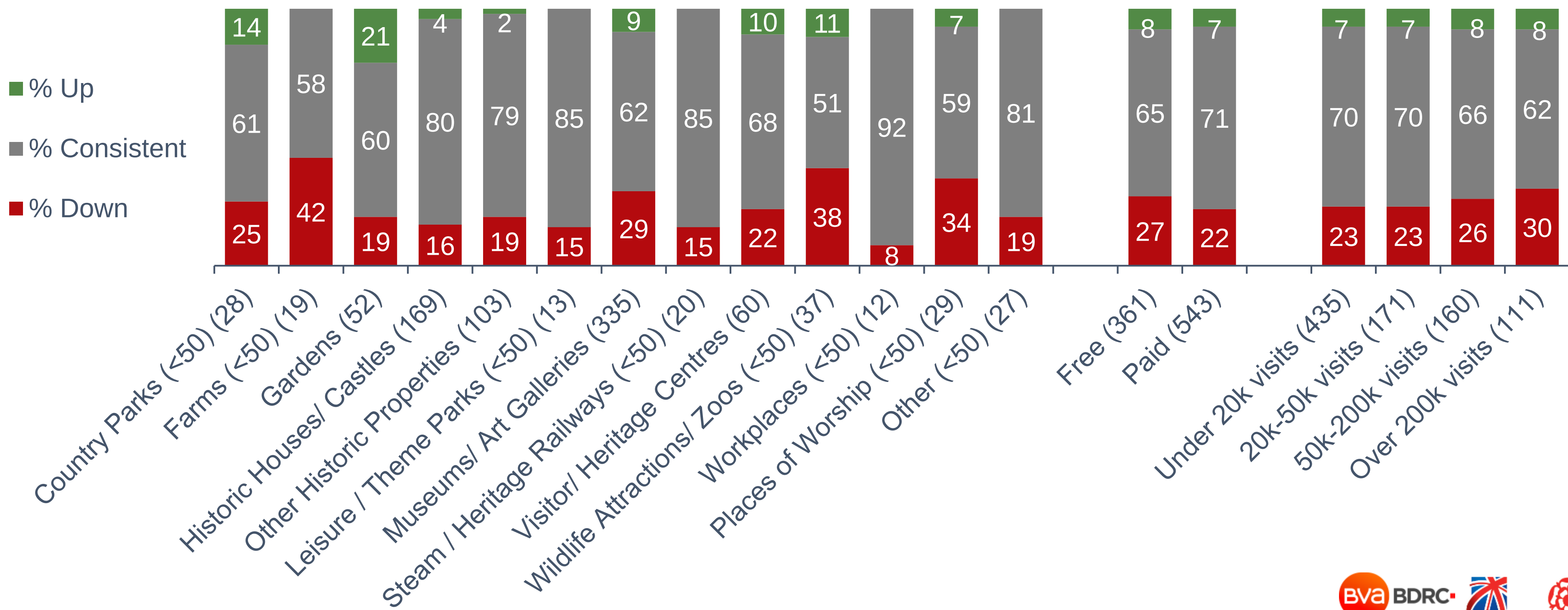
(<50) Base size below 50 (please treat with caution)

Employment Trends: Unpaid Volunteers Summary (2020 Predictions)

Even unpaid positions are expected to reduce in 2020, with a quarter (24%) of sites anticipating a decline, compared with just 7% who plan to recruit more volunteers.

Farms, wildlife attractions, places of worship and museums/ galleries are most likely to anticipate a decline.

Anticipated change in employees in 2020



Base: All answering employment questions – unpaid volunteers (904)

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

Appendix

Questionnaire: Main questions

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2019

Please help VisitEngland establish trends in the attractions' sector in 2019 by taking part in our major annual survey, conducted by BVA Group, supported by Aurora and Documents Despatch. **ALL ATTRACTIONS COMPLETING THIS QUESTIONNAIRE WILL RECEIVE A PERSONALISED REPORT BENCHMARKING THEIR PERFORMANCE AND YOU WILL BE ENTERED INTO A PRIZE DRAW TO WIN £100.**

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

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by **10th August 2020** in the pre-paid envelope provided. Please refer to the enclosed guidelines when completing the questionnaire.

To provide your response more quickly, you can complete this questionnaire ONLINE at www.visitenglandattractions.com. Simply login using the User Name and Password details printed below.

If any of the contact information printed below is incorrect or missing, please write in the correct details.

Contact Name:	Tel:	ID:
E-mail:	Name of Attraction:	User Name:
Position:	Website:	Password:
Address:	E-mail/ telephone for prize draw if different from the above:	Serial:

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

SECTION ONE – ATTRACTION DETAILS

1.1 In past years, your main attraction category was:

Is this correct? Yes ☐ No ☐ **If no or missing, please tick below the main category to be used for analysis.**

Castle / Fort	☐	Museum and / or Art Gallery	☐
Country Park	☐	Farm / Rare Breeds / Farm Animals	☐
Distillery / Vineyard or Brewery	☐	Nature Reserve / Wetlands / Wildlife Trips	☐
Garden	☐	Safari Park / Zoo / Aquarium / Aviary	☐
Heritage / Visitor Centre	☐	Steam / Heritage Railway	☐
Historic House / House and Garden / Palace	☐	Other Historic / Scenic Transport Operator	☐
Historic Monument / Archaeological Site	☐	Industrial / Craft Workplace	☐
Place of Worship (still in use)	☐	Science / Technology Centre	☐
Other Historic Property	☐	Other *(Please specify below)*	☐
Leisure / Theme Park	☐	______________________	

1.2 Which of these best describes the location of your attraction? Coastal ☐ Rural ☐ Urban ☐

SECTION TWO – VISITORS

2.1 For 2018, 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 2018 visitor numbers: ☐ , ☐☐☐ , ☐☐☐

2.2 What were your visitor numbers during the 2019 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).

Total visitor numbers (paid and free) ☐ , ☐☐☐ , ☐☐☐ Are these numbers: Exact? ☐ An Estimate? ☐

2.3 What percentage of total visitors in 2019 (paid and free) fell into each category? Adults % ☐☐☐

Children % ☐☐☐

TOTAL 100%

2.4 For 2018, your organisation provided us with a total number of school children visits of:

Approximately how many school children visited your attraction as part of an organised group in 2019?

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

2.5 Did you charge for admission to the main attraction in 2019? Yes ☐ No ☐

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2019 (including VAT): Adult £ ☐☐ . ☐☐ p (£ in 2018) Child £ ☐☐ . ☐☐ p (£ in 2018)

2.7 Origin of visitors:

(a) For 2018, your organisation provided us with a percentage of visitors from overseas of %

i) What percentage of total visitors in 2019 do you estimate were from overseas? ☐☐☐ %

ii) Compared with 2018, was the number of visitors from overseas in 2019: Up ☐ Down ☐ Similar ☐

(b) For 2018, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2019 do you estimate lived locally or within day trip distance of your attraction? ☐☐☐ %

ii) Compared with 2018, was the number of visitors living locally or within day trip distance in 2019:

Up ☐ Down ☐ Similar ☐

2.8 **i)** What percentage of your total visitors in 2019 do you estimate visited your attraction as part **of a family group** (i.e. visited with children aged under 18)? ☐☐☐ %

ii) Compared with 2018, was the number of family group visitors in 2019:

Up ☐ Down ☐ Similar ☐

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

(a) How did the attraction's gross revenue in 2019 compare with 2018? Up ☐ Down ☐ Similar ☐

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

3.2 Compared with 2018, was expenditure on marketing activities in 2019: Up ☐ Down ☐ Similar ☐

3.3 Which of the following digital communications did your main attraction offer in 2019?

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

3.4 In 2019, was your main attraction................?

Open all year round ☐ Closed for part of the year – regular seasonal closure ☐ Closed for part of the year – other reason *e.g. refurbishment, repairs* ☐

3.5 Can your site be accessed via public transport? No ☐ Yes ☐

3.6 IF YES: Public transport access to this site is... (Please code all that apply)

Frequent (regular trains or buses) ☐ Very close (trains or buses stop at the attraction entrance) ☐ Via private shuttlebus (from local public transport stop) ☐ Flexible (there are multiple ways to access the site using public transport) ☐ None of these ☐

SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2018, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2019 (including yourself, working owners and self employed)...?:

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

Seasonal: Up ☐ Down ☐ Similar ☐ None ☐

4.2 And compared with 2019, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2020 to be:

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

Seasonal: Up ☐ Down ☐ Similar ☐ None ☐

SECTION FIVE - HOW CAN WE USE YOUR DATA?

The information you provide in this survey will be combined with results from other attractions and used to assess sector trends.

All data will be held in strict confidence by VisitEngland BVA Group, Aurora and Documents Despatch. We encourage attractions to provide permission to publish visitor numbers, which could help to raise the profile of your organisation.

P.1 Can we publish your total visitor numbers (Q2.2)? Yes ☐ No ☐

P.2 Historic England (previously known as English Heritage) uses the heritage data from this survey. Can we pass on data from your attraction for this purpose? Yes ☐ No ☐ Not a Heritage attraction ☐

P.3 From time to time local destination organisations request data to inform tourism development and planning locally. Can we pass on data from your attraction to organisations representing your area for this purpose? Yes ☐ No ☐

P.4 Would you be willing for BVA BDRC or VisitEngland to contact you (within 6 months) about any follow up questions resulting from this research? Yes – BVA BDRC only ☐ Yes – VisitEngland only ☐ Yes – both ☐ No, neither ☐

I declare that the information provided on this form is true to the best of my knowledge.

Signed: .... **Date:** ....

Name: (BLOCK CAPITALS) .... **Job Title:** ....

If you would prefer to take part in this survey online in future, please write in your **Email Address:** ....

Thank you for participating in this survey. Please return the completed questionnaire by **10th August 2020** in the pre-paid envelope. No stamp is required. If you wish to contact someone about the survey then please do not hesitate to contact: Keri Portas (VisitEngland) e: annualattractionssurvey@visitengland.org, or Tanya Sharapova (BVA BDRC), e: annualattractionssurvey@bva-bdrc.com.

Questionnaire: Main questions (1/5)

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2019

Please help VisitEngland establish trends in the attractions' sector in 2019 by taking part in our major annual survey, conducted by BVA Group, supported by Aurora and Documents Despatch. **ALL ATTRACTIONS COMPLETING THIS QUESTIONNAIRE WILL RECEIVE A PERSONALISED REPORT BENCHMARKING THEIR PERFORMANCE AND YOU WILL BE ENTERED INTO A PRIZE DRAW TO WIN £100.**

All information you provide will be treated in strictest confidence (we just ask permission to publish visitor numbers at Question P.1). If there is any information you are unable to provide, you can skip this question, but we appreciate you completing as much of the questionnaire as possible.

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by **10th August 2020** in the pre-paid envelope provided. Please refer to the enclosed guidelines when completing the questionnaire.

To provide your response more quickly, you can complete this questionnaire ONLINE at www.visitenglandattractions.com. Simply login using the User Name and Password details printed below.

If any of the contact information printed below is incorrect or missing, please write in the correct details.

Contact Name:	Tel:	ID:
E-mail:	Name of Attraction:	User Name:
Position:	Website:	Password:
Address:	E-mail/ telephone for prize draw if different from the above:	Serial:

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

Questionnaire: Main questions (2/5)

SECTION ONE – ATTRACTION DETAILS

1.1 In past years, your main attraction category was:

Is this correct? Yes / No

If no or missing, please tick below the main category to be used for analysis.

- Castle / Fort
- Country Park
- Distillery / Vineyard or Brewery
- Garden
- Heritage / Visitor Centre
- Historic House / House and Garden / Palace
- Historic Monument / Archaeological Site
- Place of Worship (still in use)
- Other Historic Property
- Leisure / Theme Park
- Museum and / or Art Gallery
- Farm / Rare Breeds / Farm Animals
- Nature Reserve / Wetlands / Wildlife Trips
- Safari Park / Zoo / Aquarium / Aviary
- Steam / Heritage Railway
- Other Historic / Scenic Transport Operator
- Industrial / Craft Workplace
- Science / Technology Centre
- Other (Please specify below)

1.2 Which of these best describes the location of your attraction?

Coastal / Rural / Urban

SECTION TWO – VISITORS

2.1 For 2018, 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 2018 visitor numbers:

2.2 What were your visitor numbers during the 2019 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).

Total visitor numbers (paid and free):

Are these numbers: Exact? / An estimate?

2.3 What percentage of total visitors in 2019 (paid and free) fell into each category? Adults % / Children % / Total 100%

2.4 For 2018, your organisation provided us with a total number of school children visits of:
Approximately how many school children visited your attraction as part of an organised group in 2019?

Number of school children:

Is this number: Exact? / An estimate?

2.5 Did you charge for admission to the main attraction in 2019? Yes / No

Questionnaire: Main questions (3/5)

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2019 (including VAT):

Adult £

(£ in 2018)

Child £

(£ in 2018)

2.7 Origin of visitors:

a) For 2018, your organisation provided us with a percentage of visitors from overseas of **%**

i) What percentage of total visitors in 2019 do you estimate were from overseas? %

ii) Compared with 2018, was the number of visitors from overseas in 2019:

Up / Down / Similar

b) For 2018, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2019 do you estimate lived locally or within day trip distance of your attraction? %

ii) Compared with 2018, was the number of visitors living locally or within day trip distance in 2019: Up / Down / Similar

2.8 i) What percentage of your total visitors in 2019 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %

ii) Compared with 2018, was the number of family group visitors in 2019:

Up / Down / Similar

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

a) How did the attraction's gross revenue in 2019 compare with 2018? Up / Down / Similar

b) What was the percentage increase / decrease? %

3.2 Compared with 2018, was expenditure on marketing activities in 2019: Up / Down / Similar

3.3 Which of the following digital communications did your main attraction offer in 2019?

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

Questionnaire: Main questions (4/5)

3.4 In 2019, was your main attraction?
Open all year round
Closed for part of the year – regular seasonal closure
Closed for part of the year – other reason *e.g. refurbishment, repairs*
3.5 Can your site be accessed via public transport? Yes / No
3.6 IF YES: Public transport access to this site is… (Please code all that apply)
Frequent (regular trains or buses)
Very close (trains or buses stop at the attraction entrance)
Via private shuttlebus (from local public transport stop)
Flexible (there are multiple ways to access the site using public transport)
None of these

SECTION FOUR – HUMAN RESOURCES
4.1 Compared with 2018, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2019 (including yourself, working owners and self employed)…?:
Permanent: Up / Down / Similar / None
Unpaid volunteers: Up / Down / Similar / None
Seasonal: Up / Down / Similar / None
4.2 And compared with 2019, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2020 to be:
Permanent: Up / Down / Similar / None
Unpaid volunteers: Up / Down / Similar / None
Seasonal: Up / Down / Similar / None

Questionnaire: Main questions (5/5)

SECTION FIVE - HOW CAN WE USE YOUR DATA?

The information you provide in this survey will be combined with results from other attractions and used to assess sector trends.

All data will be held in strict confidence by VisitEngland BVA Group, Aurora and Documents Despatch. We encourage attractions to provide permission to publish visitor numbers, which could help to raise the profile of your organisation.

P.1 Can we publish your total visitor numbers (Q2.2)? Yes / No

P.2 Historic England (previously known as English Heritage) uses the heritage data from this survey. Can we pass on data from your attraction for this purpose? Yes / No / Not a Heritage attraction

P.3 From time to time local destination organisations request data to inform tourism development and planning locally. Can we pass on data from your attraction to organisations representing your area for this purpose? Yes / No

P.4 Would you be willing for BVA BDRC or VisitEngland to contact you (within 6 months) about any follow up questions resulting from this research? Yes – BVA BDRC only / Yes – VisitEngland only / Yes – both / No, neither

I declare that the information provided on this form is true to the best of my knowledge.

Signed: … Date: …Name: (BLOCK CAPITALS) …   Job Title: …

If you would prefer to take part in this survey online in future, please write in your Email Address: …

Thank you for participating in this survey. Please return the completed questionnaire by 10th August 2020 in the pre-paid envelope. No stamp is required. If you wish to contact someone about the survey then please do not hesitate to contact: Keri Portas (VisitEngland) e: annualattractionssurvey@visitengland.org, or Tanya Sharapova (BVA BDRC), e: annualattractionssurvey@bva-bdrc.com.

Questionnaire: Additional online survey questions (1/2)

VISITS TO VISITOR ATTRACTIONS IN 2019: ADDITIONAL ONLINE QUESTIONS

Thank you. There are a few final questions that we would be grateful if you could answer. If you would prefer not to answer these questions you can skip past them to the permissions questions.

5.1 Does your attraction have an online booking system?

1. Yes
2. No

ASK IF 5.1=YES

5.2 What is the name of your online booking system? TYPE IN

ASK IF 5.1=YES

5.3 Where do you currently sell online tickets to your attraction?

1. Own Website
2. Own Social media platform
3. VisitBritain Shop
4. TripAdvisor/Viator
5. Expedia local expert
6. AirBNB
7. DMO
8. Other
9. None of the above
10. Not sure

ASK IF 5.1=YES

5.4 Where (else) would you like to sell tickets to your attraction?

REDUCE LIST BASED ON ANSWER AT 5.3

1. Own Website
2. Own Social media platform
3. VisitBritain Shop
4. TripAdvisor/Viator
5. Expedia local expert
6. AirBNB
7. DMO
8. Other
9. None of the above
10. Not sure

Questionnaire: Additional online survey questions (2/2)

ASK IF 5.1=NO
5.5 Would you be interested in the free booking tool offered through Tourism Exchange Great Britain (TXGB)? This is a business-to-business platform connecting tourism Suppliers to distributors around the world (www.txgb.co.uk)
Potentially interested in finding out more
No, we would prefer to look at other options
No, as we don't target overseas visitors

6.1 Do you collect visitor profiling data, through a visitor survey or other means?
Yes
No

ASK 6.2-6.4 IF 6.1=YES
6.2 What proportion of your visitors fall into each of the following age categories? CAPTURE % FOR EACH OF CATEGORIES 1-3; CHECK ADDS TO 100%
Under 25 years
25-34 years
35-44 years
45-54 years
55-64 years
65 years or older
We don't collect this data/ use different age bands (SINGLE CODE)

6.3 Approximately what proportion of your visitors belong to each of the following ethnic groups? CAPTURE % FOR EACH OF CATEGORIES 1-3; CHECK ADDS TO 100%
White British
White non-British
Black, Asian or Mixed
Don't know (SINGLE CODE)

6.4 Approximately what proportion of your visitors are visiting from…? CAPTURE %; DON'T ENFORCE DATA ENTRY FOR EACH CODE; ENSURE TOTAL ADDS TO MAXIMUM OF 100%
United Kingdom
Rest of Europe
North America
South America
Africa
Asia
Australasia & Oceania
Don't know (SINGLE CODE)