Visitor Attraction Trends in England 2018

Full Report

August 2019

VisitEngland

BVA BDRC

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.

VisitEngland is grateful to Historic England for their financial support for the 2019 survey.

August 2019

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 (1)

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

- In 2017 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 therefore updated in 2015 using Experian business data. This data was de-duplicated against the existing attractions database. Where known, new attractions are added each year.

5,491 English visitor attractions were invited to take part in this year's survey.

1,501 English visitor attractions responded to the survey in 2019, 1,384 of whom provided 2018 visitor numbers.

- 761 completed online
- 307 completed by post
- 433 provided data through umbrella organisations

1,332 attractions provided admissions for both 2018 and 2017 and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response (2)

Response by attraction category

Category	No. attractions providing data for 2017 & 2018	Profile of attractions providing data	
		2017	2018
Country Parks	36	*6%*	*3%*
Farms	30	*3%*	*2%*
Gardens	81	*6%*	*6%*
Historic Properties	430	*31%*	*34%*
Leisure / Theme Parks	23	*2%*	*2%*
Museums / Art Galleries	444	*32%*	*32%*
Steam / Heritage Railways	37	*2%*	*2%*
Visitor / Heritage Centres	76	*5%*	*5%*
Wildlife Attractions / Zoos	62	*5%*	*5%*
Workplaces	10	*1%*	*1%*
Places of Worship	49	*4%*	*4%*
Other	54	*3%*	*4%*
Total	**1,332**		

Sample & Response (3)

Response by region

Category	No. attns. giving 2017 & 2018 data	Profile of attractions providing data	
		2017	2018
North West	*152*	*10%*	*12%*
North East	*72*	*5%*	*5%*
Yorks/Humber	*128*	*11%*	*10%*
East Midlands	*128*	*9%*	*10%*
West Midlands	*107*	*9%*	*8%*
East	*160*	*12%*	*12%*
London	*85*	*7%*	*6%*
South East	*256*	*19%*	*19%*
South West	*244*	*18%*	*18%*
Total	1,332		

Response by attraction size and admission type

Category	No. attns. giving 2017 & 2018 data	Profile of attractions providing data	
		2017	2018
Annual Visits			
10,000 or less	*383*	*29%*	*29%*
10,001 – 20,000	*159*	*12%*	*12%*
20,001 – 50,000	*266*	*20%*	*20%*
50,001 – 100,000	*146*	*11%*	*11%*
100,001 – 200,000	*142*	*11%*	*11%*
Over 200,000	*236*	*17%*	*18%*
Total	1,332		

Admission			
Free	493	*37%*	*39%*
Paid	*839*	*63%*	*61%*
Total	1,332		

Headlines: Admissions

Overall, attractions in England reported a +2% annual increase in total visits from 2017 to 2018, consistent with the growth level seen since 2015.

The volume of overseas visits to attractions in England grew by 4% in 2018, despite the number of inbound tourists to England decreasing in 2018 after a record 2017.

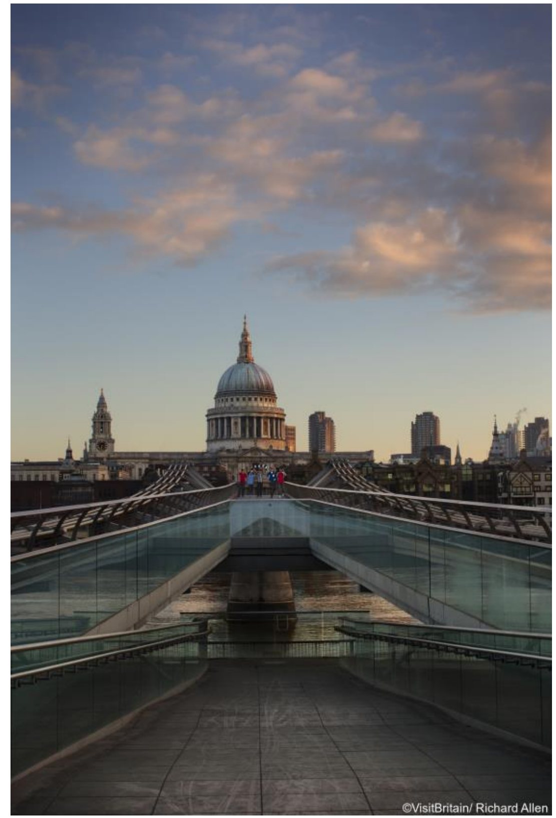
Local / day trip visits remained stable compared with 2017 at an overall level, but there were substantial differences by sector, which could be linked to the impact of the weather seen throughout 2018.

The number of child admissions dropped back slightly by -1% in 2018, compounding the decline of -7% from 2016-17**. In contrast, the number of school visits has slightly grown for the first time in 5 years** (+1% in 2018, -2% 2017, -1% for each of the previous three years).

In almost all regions, the change in visitor admissions ranged from -1% to +2%. The exception was the North West (+8%) which saw increased visitor numbers following a slight decline in 2017 (-0.5%).

Museums/ art galleries had a strong year on year increase in visitor numbers, bouncing back following three years of decline (+6%).

Visitor / heritage centres have seen visitor numbers grow ahead of the national average in recent years, but dipped back slightly in 2018 (-4%) after peaking in 2017.



Headlines: Revenue & Admission Pricing

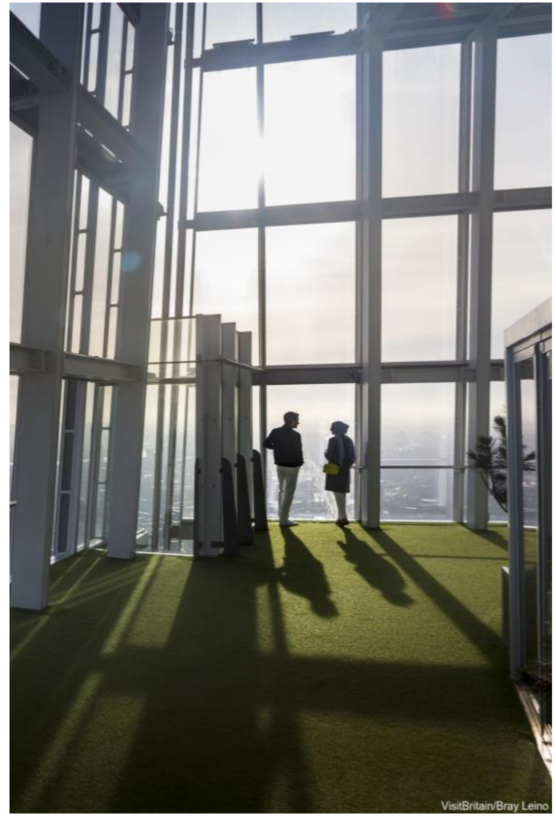
At an overall level, the gross revenue at visitor attractions increased by +2% in 2018. This is in line with the growth of visitor admissions, but is lower than revenue increases in most previous years.

The North West (+9%) was the region which saw the strongest increase in gross revenue in 2018, compared with the previous year. East of England (+4%) and the South East (+3%) also increased their gross revenue more than average. However, East Midlands (-2%), West Midlands (-1%) and London (-1%) all saw their revenue fall.

Adult admission fees increased by +5% in 2018, which is consistent with increases in recent years of between +4 and +6%. This increase exceeds the rate of inflation seen over the same period (3.3%, source: Bank of England, Consumer Price Inflation).

The proportion of paid attractions that charged for child entry remained consistent with recent years at 88%. However, child admission fees continue to increase at a higher rate than adult charges (+8% in 2018, which follows increases of +7% in 2017 and +4% in 2016).

All regions in England have seen a rise in average adult admission charges in 2018 of at least +4%, with London attracting increasing entrance fees by +10% on average.



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.

These differences were quite distinct in 2018. Those sites increasing their marketing spend increased admissions by +3%, compared with a decline of -5% amongst those who cut budgets.

Engagement with digital communications has plateaued at 89%. Facebook (86%) and Twitter (66%) continue to be the dominant platforms used by attractions.

Attraction use of Instagram / Pinterest continues to rise, growing from just 22% of attractions using in 2015 to 52% in 2018.

Use of mobile technology is still limited (17% offer mobile apps, 9% a mobile website), **except at historical attractions** where app use rises to 47% of historic houses / castles and 36% of other historic properties.

On average, attractions who offer digital communications saw visitor numbers rise in 2018, whereas those who don't saw visitor numbers decrease.

Headlines: Additional Draws to Visit & Employment

The most commonly mentioned additional draw to visit at free attractions is temporary exhibitions, with nearly half (48%) saying this helped them to attract visitors in 2018. This is followed by a catering offer (29%), hosted hobby sessions (20%) and art installations (14%) which attractions listed as an additional draw to their site.

Nearly as many charging as free attractions believe that extending their offer helped to draw in additional visitors, but the importance of these additional draws varies. At charging attractions catering (35%) is seen as the most important additional draw, followed by temporary exhibitions (29%) and 'living history' e.g. live interpreters (21%).

Employment within the attractions sector has remained buoyant, with more sites increasing permanent, seasonal and volunteer staff than those reducing.

Once again the largest growth is seen in unpaid volunteers, with 20% of attractions having increased their staffing in this area, compared with only 4% that have seen a reduction. With 87% of attractions relying on unpaid helpers, and further expansion anticipated in 2019, competition for volunteer time is strong and growing.

Employee numbers also grew in 2018, with a net increase (% up - % down) in permanent staff of +9 and for seasonal staff of +7.

2018 UK Weather Summary

2018 was warmer than average for the UK, although not as warm as 2017. May, June and July were all much warmer and sunnier than is typical for these months, with May being the sunniest on record for the UK. East Anglia had its sunniest year on record.

It was also a relatively dry year, notably across the north of England, with June a very dry month in the south.

Notable extreme events during the year included a spell of **severe winter weather in late February and early March.** The Met Office issued two Red Warnings, and this was the most notable spell of snow and low temperatures for the UK since 2010.

High pressure dominated the summer. Some rain gauges in southern England recorded more than 50 consecutive dry days and temperatures exceeded 30 °C fairly widely on 15 days during July and August.

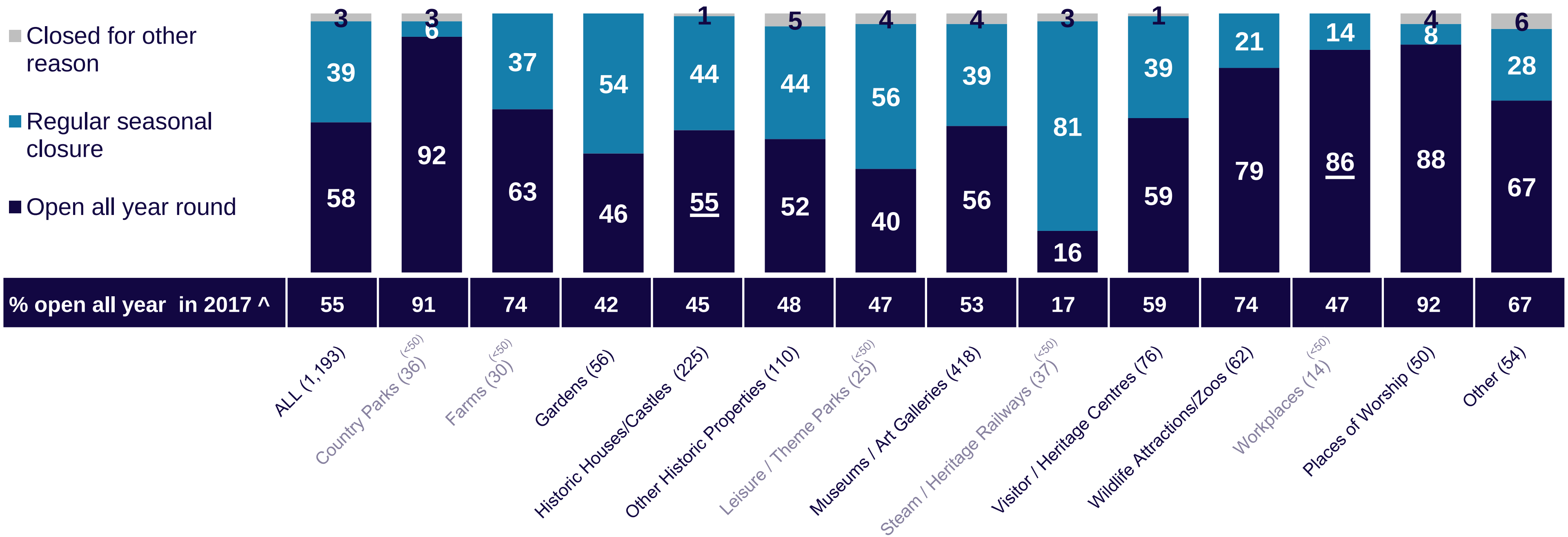
Nine named storms affected the UK during 2018. Storm Ali in mid-September brought strong winds to the north and was one of the most notable early autumn storms of recent decades. Storm Callum in mid-October brought persistent heavy rain to western areas.

Source: MET Office

Attraction Opening: By Attraction Category

In 2018 58% of attractions remained open throughout the year, marginally more than in 2017 (55%). Country parks and places of worship remain the most likely to remain open all year around, followed by workplaces and wildlife attractions. Steam and heritage railways tend to close at some point during the year, with 81% reporting regular/seasonal closure.

3% of attractions were closed for 'other' reasons (e.g. restoration work). This rises to 5% at 'other historic properties' and 6% at 'other attractions' (this category including caves, piers, sports stadium tours, model villages and so on).



	ALL (1,193)	Country Parks (36)	Farms (30)	Gardens (56)	Historic Houses/Castles (225)	Other Historic Properties (110)	Leisure / Theme Parks (25)	Museums / Art Galleries (418)	Steam / Heritage Railways (37)	Visitor / Heritage Centres (76)	Wildlife Attractions/Zoos (62)	Workplaces (14)	Places of Worship (50)	Other (54)
% open all year in 2017 ^	55	91	74	42	45	48	47	53	17	59	74	47	92	67

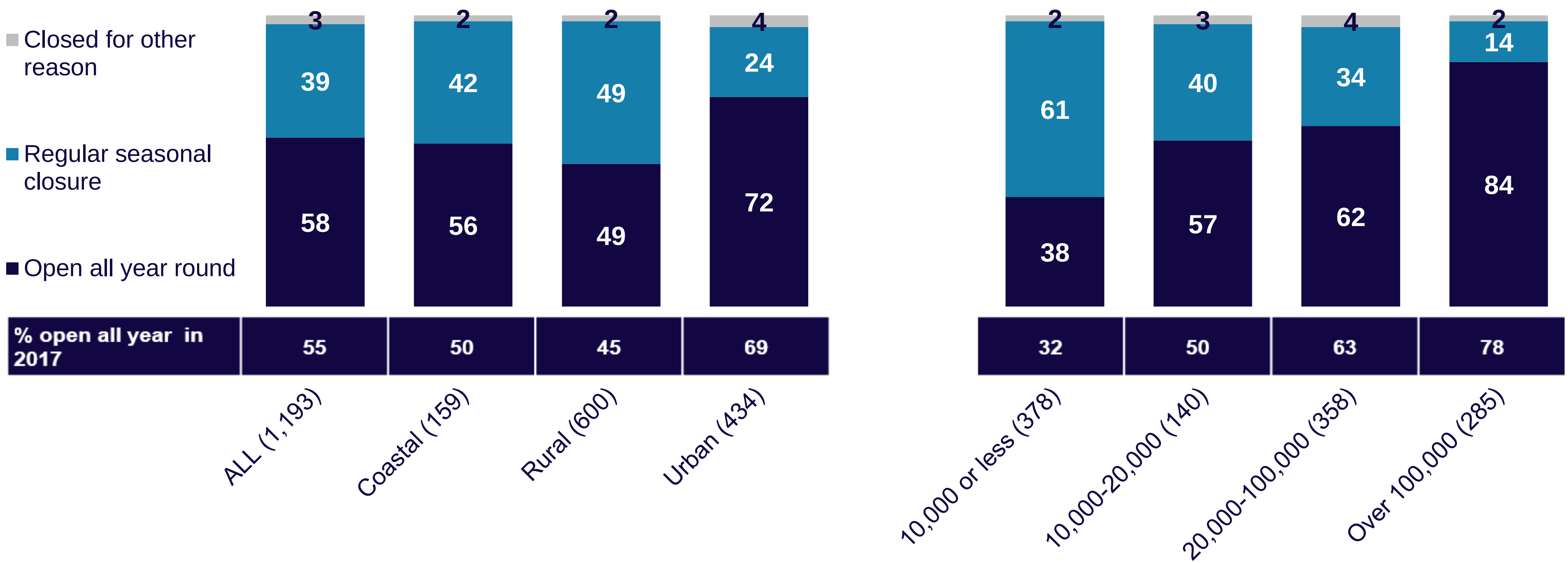
Base: All attractions answering opening times question (1,193)
(<50) Base size below 50 (greyed out – please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based
^Underlined scores indicate 2018 % 'open all year round' showing a significant difference from 2017

Attraction Opening: By Destination Type & Attraction Size

Large attractions welcoming over 100,000 visitors a year, and those situated in urban areas, are more likely to remain open all year round (84% and 72% respectively).

However, seasonal closure has reduced in coastal and rural areas, and at smaller attractions.



% open all year in 2017	ALL (1,193)	Coastal (159)	Rural (600)	Urban (434)	10,000 or less (378)	10,000-20,000 (140)	20,000-100,000 (358)	Over 100,000 (285)
	55	50	45	69	32	50	63	78

Base: All attractions answering opening times question (1,193)

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

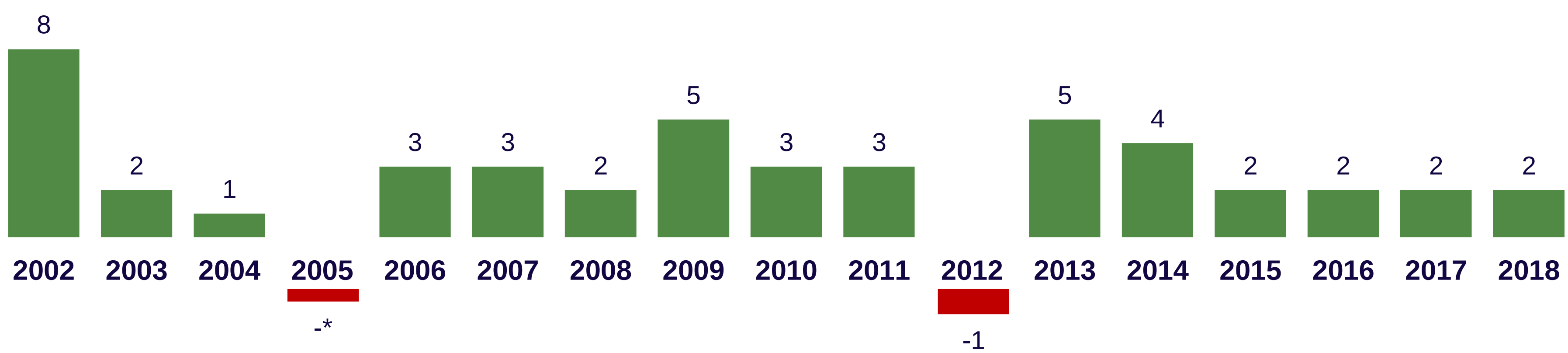
Visitor Admission Trends

Overall Visitor Admission Trends

Overall, attractions in England reported a +2% annual increase in total visits from 2017 to 2018, consistent with the levels seen since 2015.

5 out of 9 English regions reported increased visits from 2017 to 2018. Overseas visits to attractions in England grew by +4%, whilst local / day trip visits remained at a stable level when compared to 2017.

Annual % change in visits



Base: All attractions providing visits data for current and previous year (1,332 in 2019)

* % change is under 1%, therefore not shown

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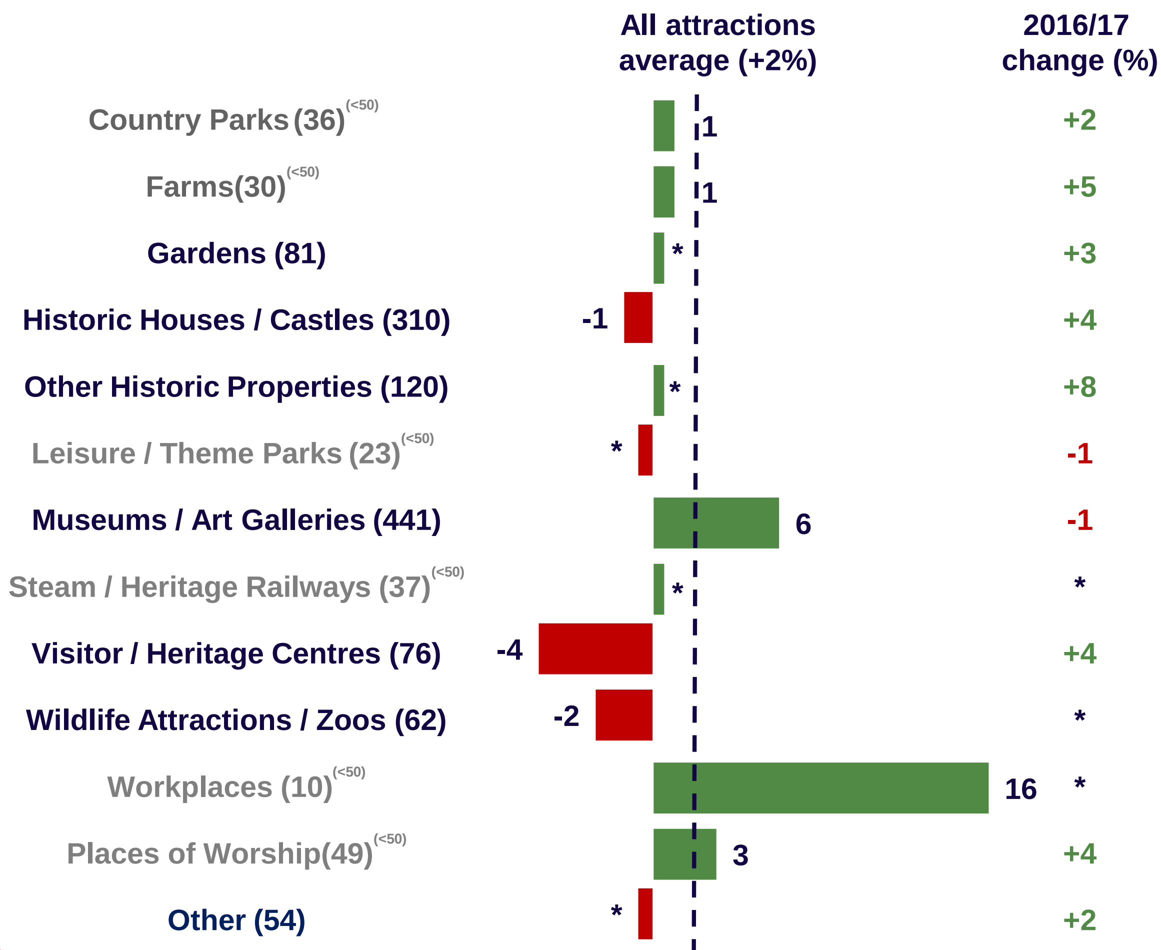
Visitor admission trends 2018: By Attraction Category



Visitor admissions in 2018 remained within a one percentage point difference from 2017 for the majority of sectors, but there were a few sectors that saw a larger change in their performance.

Museums / art galleries had a strong increase (+6%) in visitor numbers in 2018, following three years of decline (-1% in 2017 & 2016, -0.5% in 2015).

Admissions to places of worship continued to grow, increasing by +3%, following growth of +4% in 2017.

In contrast visitor / heritage centres and wildlife attractions both reported declines (-4% and -2% respectively. For visitor / heritage centres this follows a +4% increase in 2017.

Please note: the increase for workplace attractions (+16%) is driven by a step-change in admissions at one particular attraction that has extended its offer, so the % change should be treated with caution.

Base: All attractions providing visits data for current and previous year (1,332)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based

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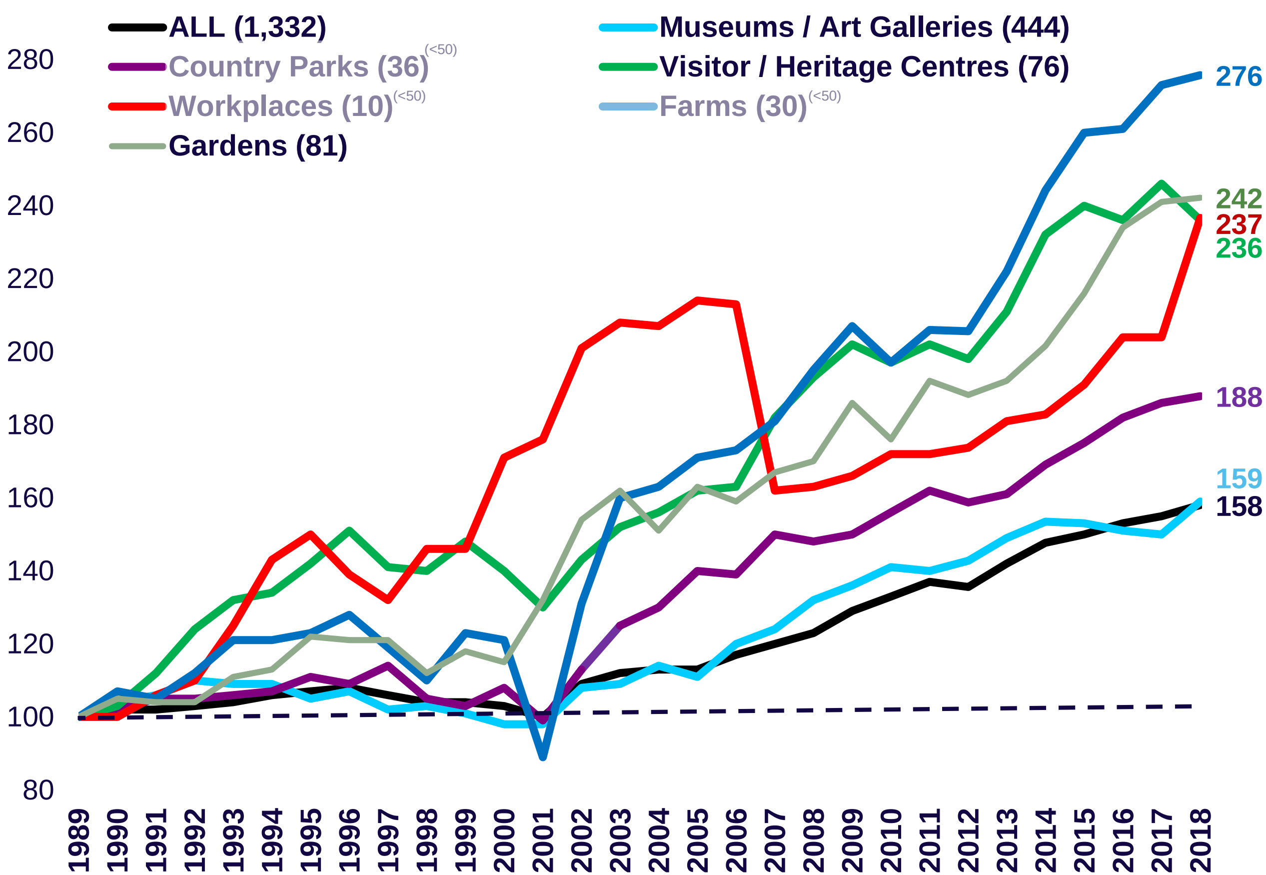
Index of Visits to Attractions: Calculation

The charts presented on slides 19 and 20 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 58% during that time (index of 158).**

With an index of 276, farms have recorded the largest increase in visitor admissions since 1989, with rapid growth since the foot and mouth outbreak in 2001.

Visitor / heritage centres and gardens have also performed well during this period (despite the decline for visitor/heritage centres in 2018).

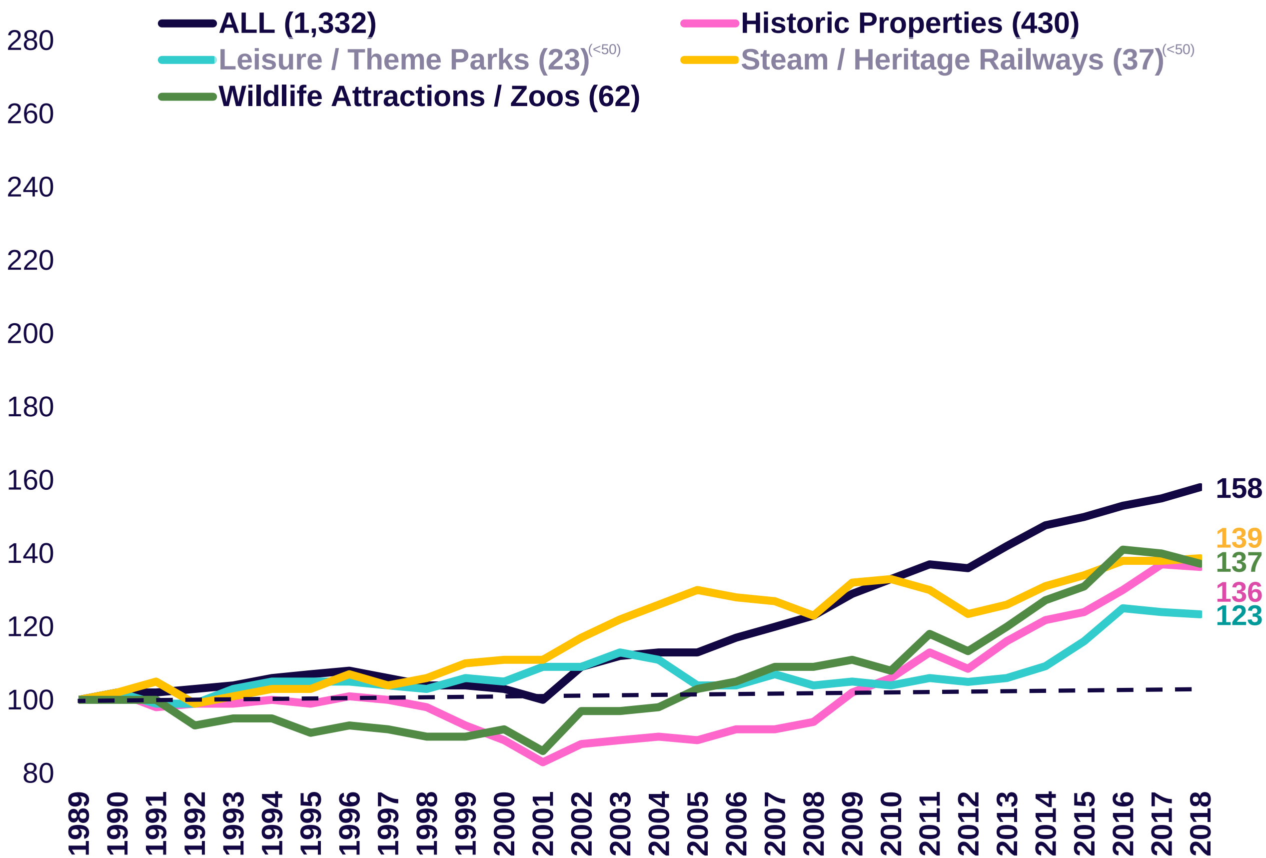
The upturn in performance of museums / art galleries sees the sector now marginally outperforming the average (index of 159) following two years below the index.

Please note: the jump in the visit index for workplace attractions is driven by a step-change in admissions at one particular attraction that has extended its offer, and as such, should be treated with caution.

Base: All attractions providing visits data for current and previous year (1,332)
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 58% during that time (index of 158).**

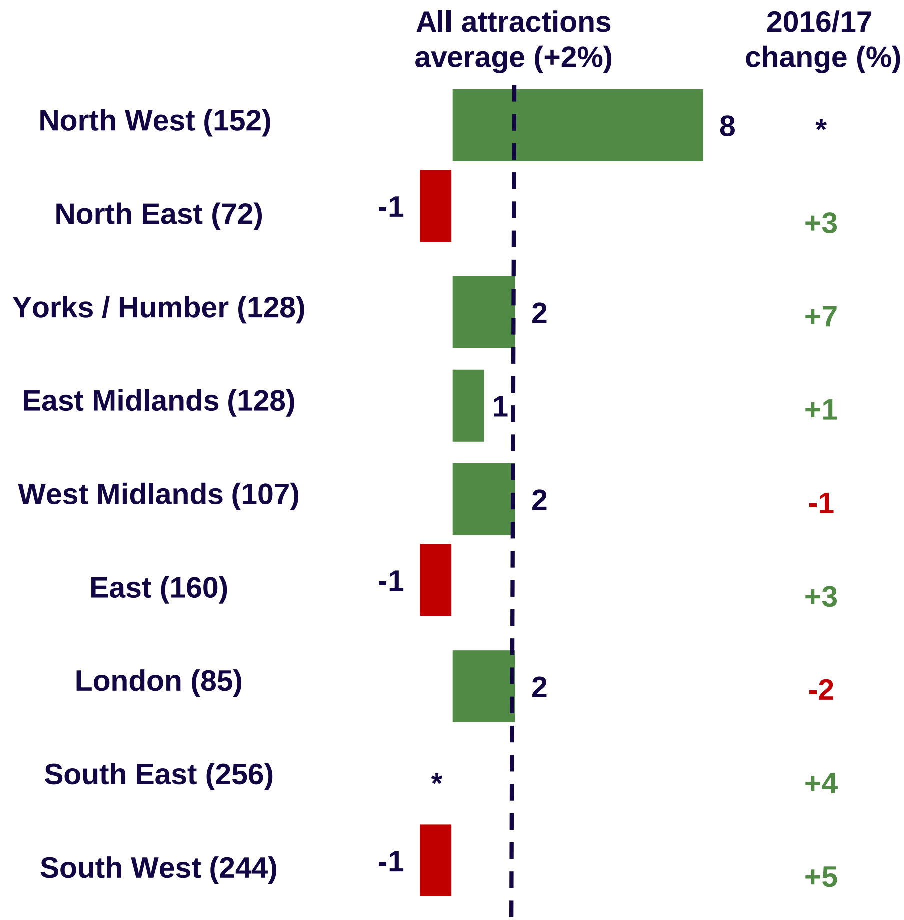
Sectors that have historically performed below the attractions average have continued to do so in 2018, with steam/heritage railways being the only of these sectors to report a slight increase.

2018 was the second year of decline for wildlife attractions/ zoos and also for leisure/ theme parks.

Base: All attractions providing visits data for current and previous year (1,332)
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 2018: By Region



In most regions, the change in visitor admissions ranged from -1% to 2%.

The exception to this was in the North West. This region had seen a small decline in admissions in 2017, but managed to grow admissions by +8% in 2018. This was supported by a strong performance by some of the region's largest attractions, such as World Museum Liverpool (with its successful Terracotta Warriors exhibition) and IWM North (bolstered by the WW1 centenary celebrations).

London attraction admissions had also seen a couple of years of decline (2017: -2%; 2016; -1%; 2015: -3%), but bounced back in 2018, growing admissions by +2%.

Base: All attractions providing visits data for current and previous year (1,332)
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 2018: By Admission Charge, Geographic Location & Size

	All attractions average (+2%)	2016/17 change (%)
Free (493)	4	*
Paid (839)	*	+4
Coastal (168)	*	+5
Rural (667)	-1	+3
Urban (497)	4	*
20,000 visits or less (542)	-4	+4
20,001 – 50,000 visits (266)	-1	+4
50,001 – 200,000 visits (288)	-2	+5
Over 200,000 visits (236)	3	+1

Free sites (+4%) outperformed paid sites (no change) in 2018. This bucks the trend seen over the last few years, where paid sites grew visitor numbers, while admissions to free sites remained fairly stable over the same period. (Paid sites: +4% 2017; +4% 2016; +2% 2015 vs. Free sites: -<1% 2017; +<1% 2016; +1% 2015)

Larger sites (200,000+ visitors) and those in urban locations reported growth in 2018 (+3% and +4% respectively), while small sites with fewer than 20,000 visitors (-4%) struggled to maintain admissions seen in 2017, despite less seasonal closure.

There can be noted a certain amount of displacement of visitors from large attractions in big cities to smaller sites outside of the urban centres, which benefitted in 2017, but have now seen admissions return to previous levels.

Base: All attractions providing visits data for current and previous year (1,332)
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 2018: Paid & Free Attractions

Free attractions managed to increase their visitor admissions by 4% in 2018, while Paid attractions overall saw their admissions remain consistent year on year with 2017 figures. The charts below show the changes by attraction category split by free and paid attractions.

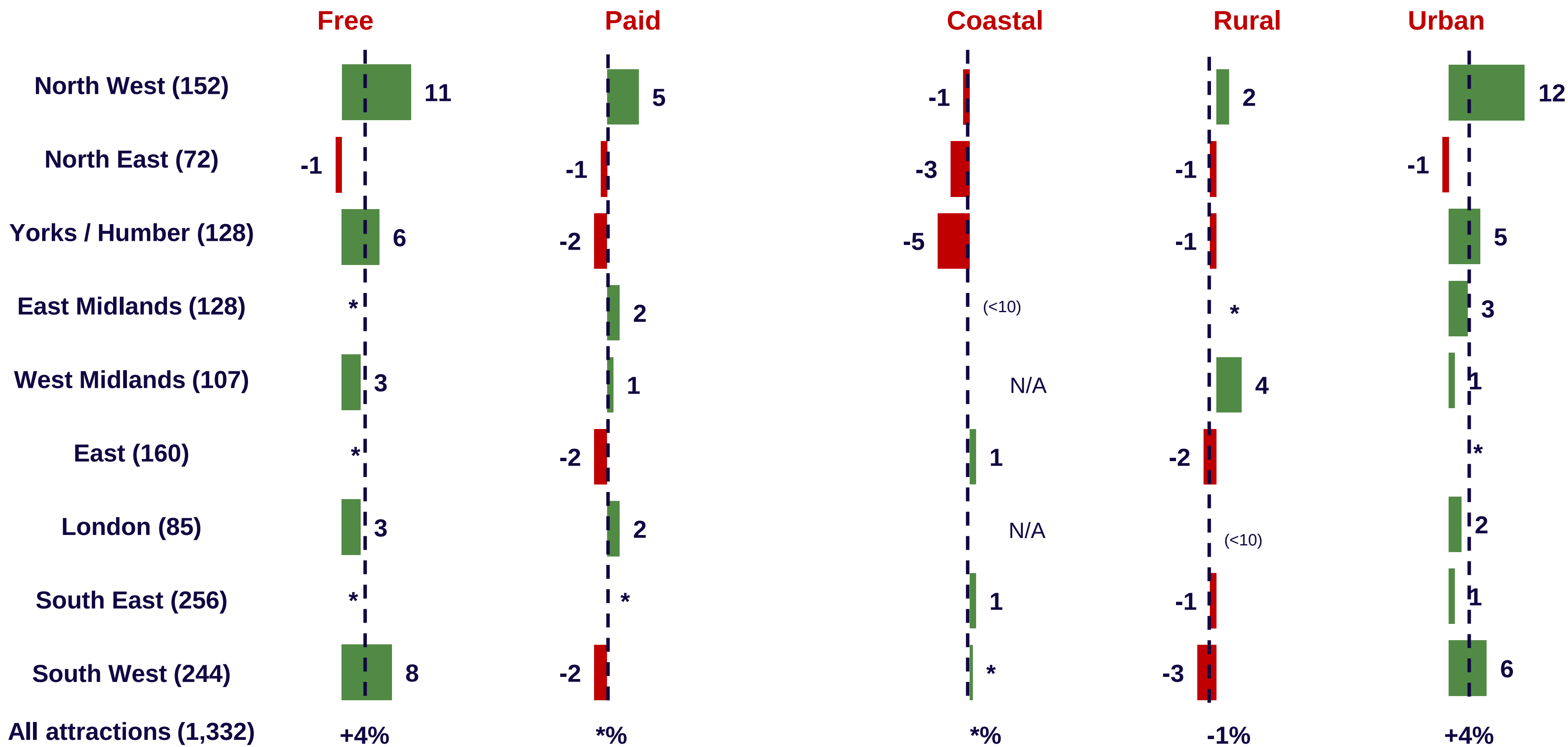
Free Attractions	2017/ 18 change (%)	2016/ 17 change (%)
ALL FREE ATTRACTIONS (493)	4	*
Country Parks (29)(<50)	*	+3
Farms (12)(<50)	6	+5
Gardens (9)(<10)		
Historic Houses / Castles (17)(<50)	-2	-6
Other Historic Properties (30)(<50)	3	+13
Leisure / Theme Parks (6)(<10)		
Museums / Art Galleries (260)	5	-2
Steam / Heritage Railways (1)(<10)		
Visitor / Heritage Centres (44)(<50)	-1	+3
Wildlife Attractions / Zoos (13)(<50)	*	+6
Workplaces (9)(<10)		
Places of Worship (42)(<50)	5	+3
Other (21)(<50)	*	+1

Paid Attractions	2017/ 18 change (%)	2016/ 17 change (%)
ALL PAID ATTRACTIONS (839)	*	+4
Country Parks (7)(<10)		-2
Farms (18)(<50)	-2	+5
Gardens (72)	*	+4
Historic Houses / Castles (293)	-1	+6
Other Historic Properties (90)	*	+8
Leisure / Theme Parks (17)(<50)	-2	-2
Museums / Art Galleries (184)	6	+5
Steam / Heritage Railways (36)(<50)	*	*
Visitor / Heritage Centres (32)(<50)	-5	+5
Wildlife Attractions / Zoos (49)(<50)	-2	-2
Workplaces (1)(<10)		
Places of Worship (7)(<10)		
Other (33)(<50)	-2	+3

Base: All attractions providing visits data for current and previous year (1,332)
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)
(<10) Base size less than 10 (figure therefore omitted)
* % change is under 1%, therefore not shown

Visitor Admission Trends 2018: Other Regional Dimensions



Base: All attractions providing visits data for current and previous year (1,332)
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(<10) Base size less than 10 (figure therefore omitted)
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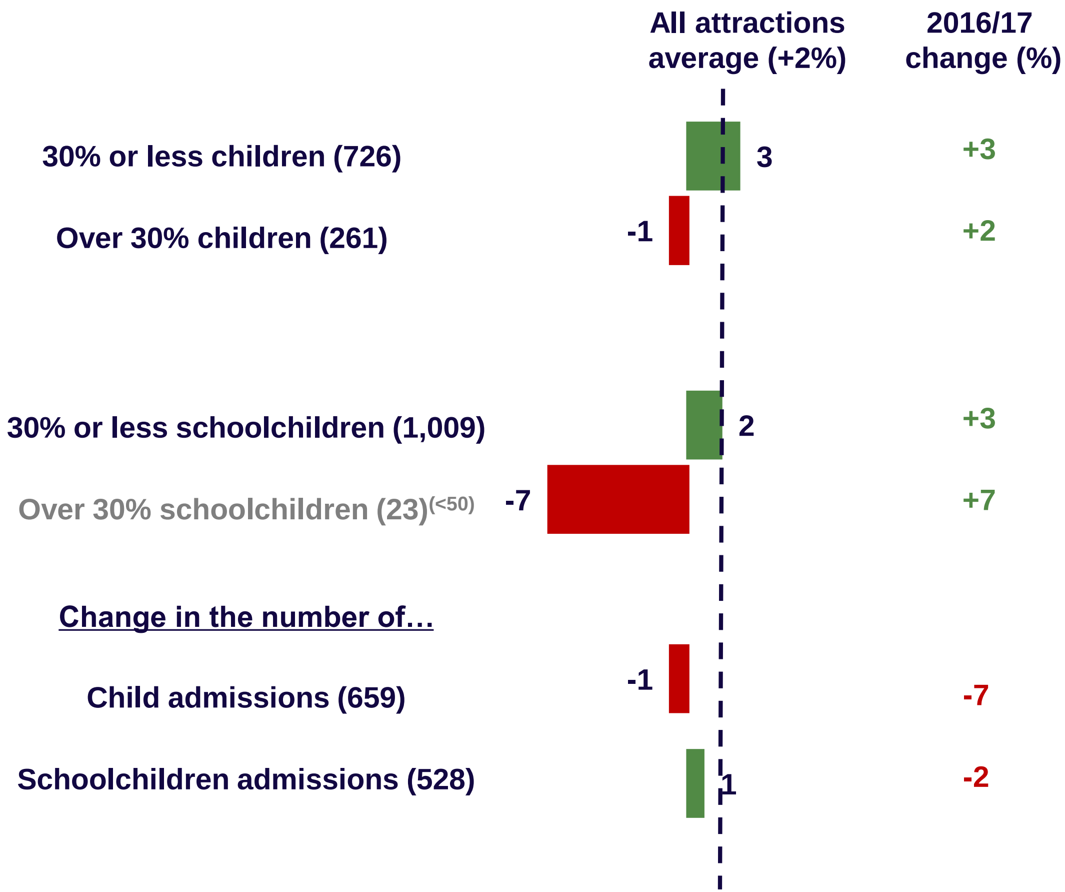
Visitor Admission Trends 2018: Child Visits Summary



Just over a quarter (26%) of attractions reported that children made up a notable proportion (over 30%) of their visitors, marginally lower than in 2017 (27%).

These child orientated sites saw a slight contraction of their visitor numbers in 2018 (-1%), in contrast with continued growth (+3%) at sites for which child visits accounted for less than 30% of their business.

Overall, the number of child admissions has dropped back slightly by -1% since 2017, compounding the decline of -7% from 2016-17.

In contrast, the number of school visits has grown slightly for the first time in 5 years (+1% in 2018).

Base: All attractions providing visits data for current and previous year (1,332)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based

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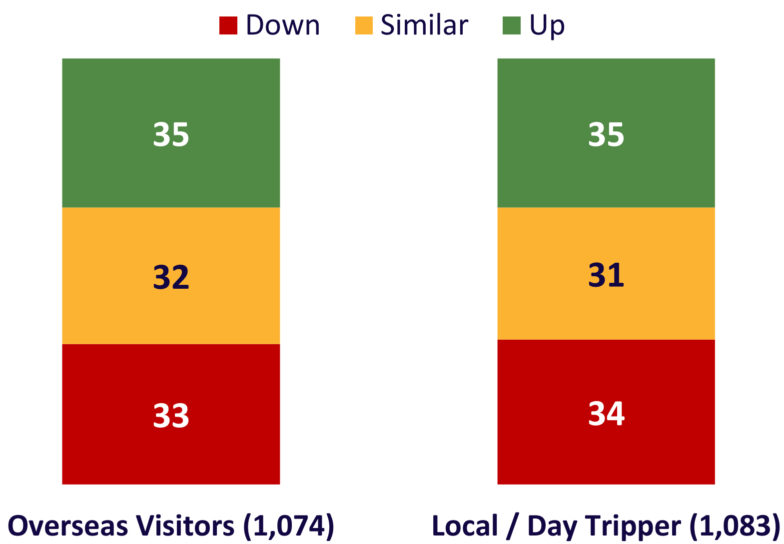
Visitor Admission Trends 2018: By Visitor Origin

Perceptions of visitor volume



% change in visits 2018

+4% in visits — Overseas (690)

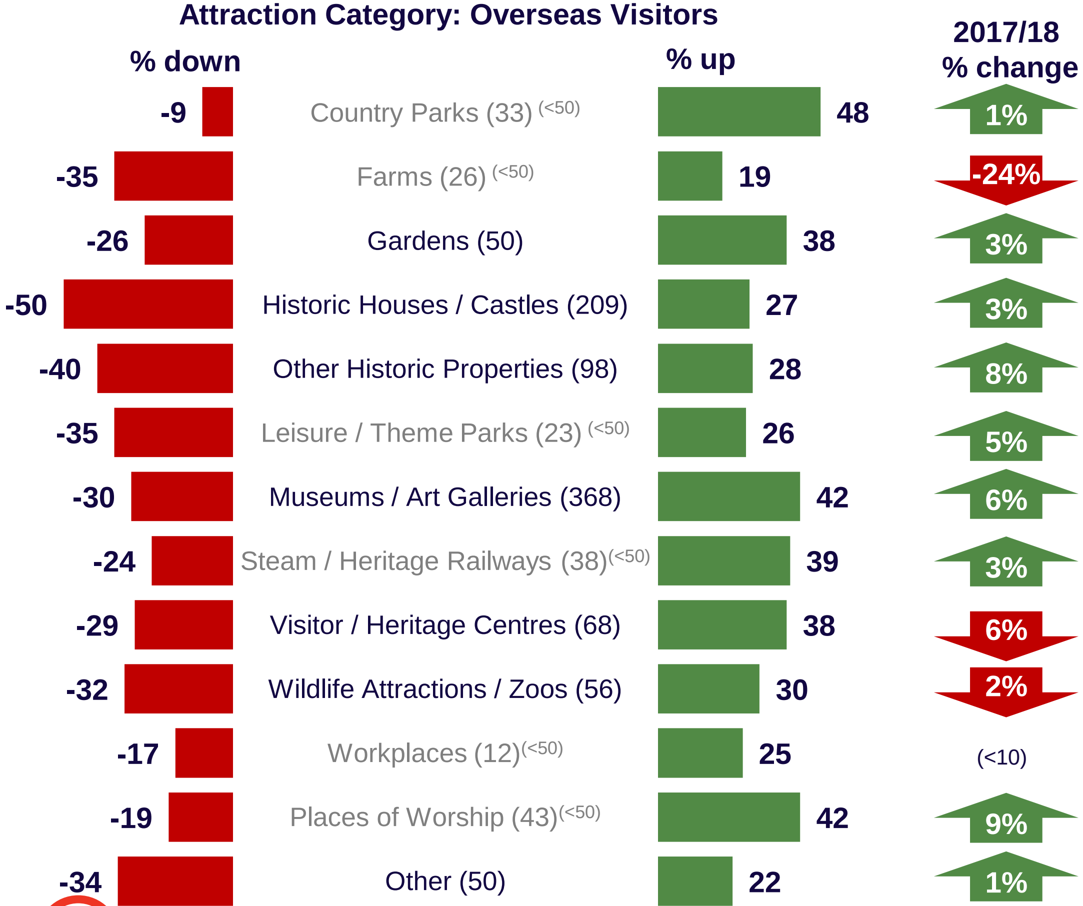
+0.5% in visits — Local / Day (707)

In 2018, the proportion of sites reporting an increase in overseas visits (35%) was at a similar level to those reporting a decline (33%). Looking at absolute visitor numbers across all sites, the volume of overseas visits to attractions grew by +4% in 2018.

A similar proportion of attractions reported an increase (35%)/ decrease (34%) in local visits / day trips. This resulted in minimal change to the share of local/day visits.

Base: All answering overseas / local visitor question (1,074/1,083)
Base: All attractions providing visits data for current and previous year (1,332)

Visitor Admission Trends 2018: Overseas Visitors by Attraction Category



The volume of overseas visits grew across most sectors in 2018, with museums and galleries (+6%) doing well with this audience.

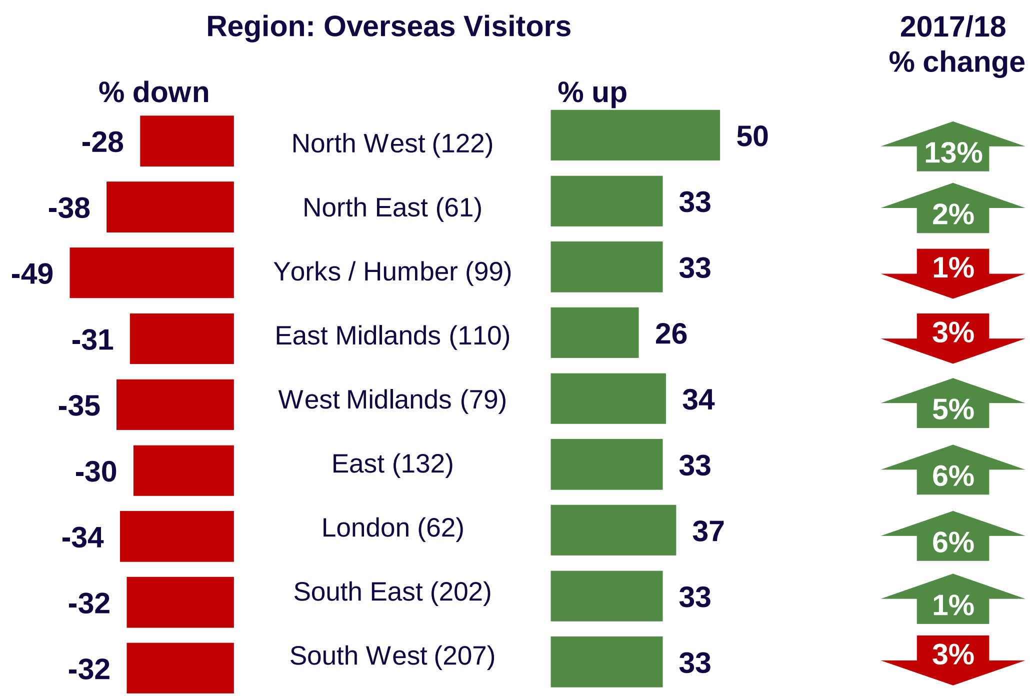
However, farms (-24%), visitor/ heritage centres (-6%) and wildlife attractions/ zoos (-2%) welcomed fewer overseas visitors in 2018.

Heritage properties were polarised in their performance. More sites reported a contraction of overseas visits (50% of historic houses/ castles and 40% of other historic properties), while the overall volume of overseas visits grew.

Base: All answering overseas visitor question (1,074/1,083)
Base: All attractions providing visits data for current and previous year (1,332)

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

Visitor Admission Trends 2018: Overseas Visitors by Region



Growth in overseas visits was strongest in the North West, where the volume of visits increased by +13% with half of the attractions in this region benefitting. This follows a healthy growth in 2017 (+6%).

Overseas visits to London recovered in 2018, up by +6%, driven by the large London attractions. West Midlands (+5%) and East of England (+6%) also saw notable increases in visits from international tourists.

After two strong years of growth (2017: +13%; 2016: +9%), overseas visits to attractions in the South West dipped in 2018.

Overseas visits to the East Midlands fell back for the second year (-3%, following a decline of -6% in 2017).

Base: All answering overseas visitor question (1,074)
Base: All attractions providing visits data for current and previous year (1,332)

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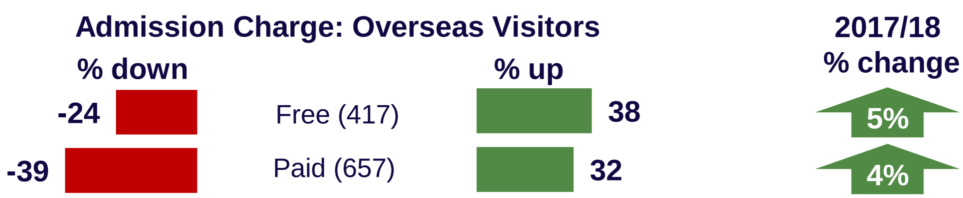
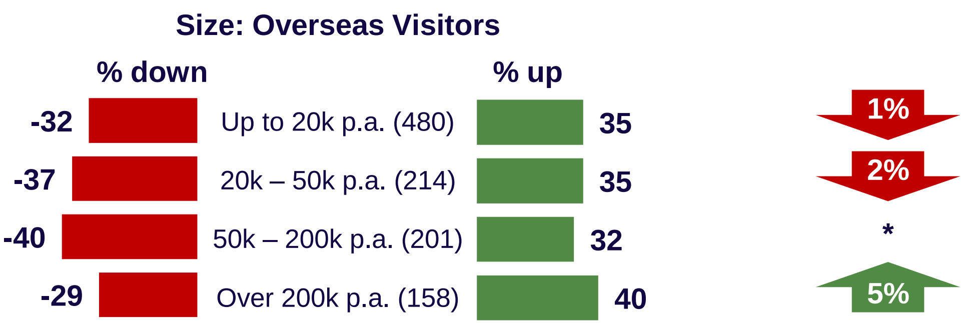
Visitor Admission Trends 2018: Overseas Visitors by Admission Charge & Size



There was an increase in the volume of overseas visitors for both free (+5%) and paid (+4%) attractions in 2018, although a higher proportion of paid sites reported a decline (39% of paid sites vs. 24% of free sites).

Consistent with 2017, large attractions (with over 200,000 visitors a year) grew their international audience (+5% in 2018), while smaller attractions decreased in overseas visitor numbers.

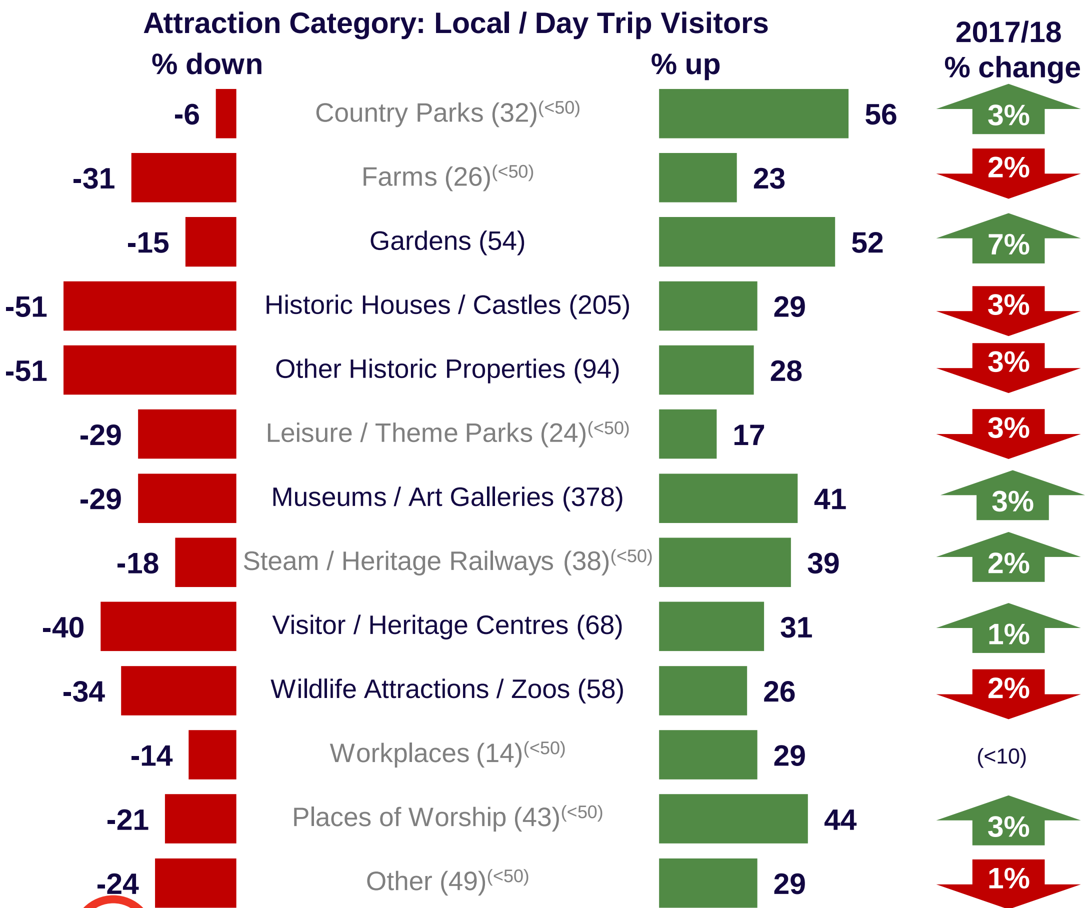


Base: All answering overseas visitor question (1,074)
Base: All attractions providing visits data for current and previous year (1,332)

* % change is under 1%, therefore not shown

VisitEngland BVA BDRC

Visitor Admission Trends 2018: Local / Day Trip Visitors by Attraction Category



Change in local/ day trip visitors varied substantially by sector.

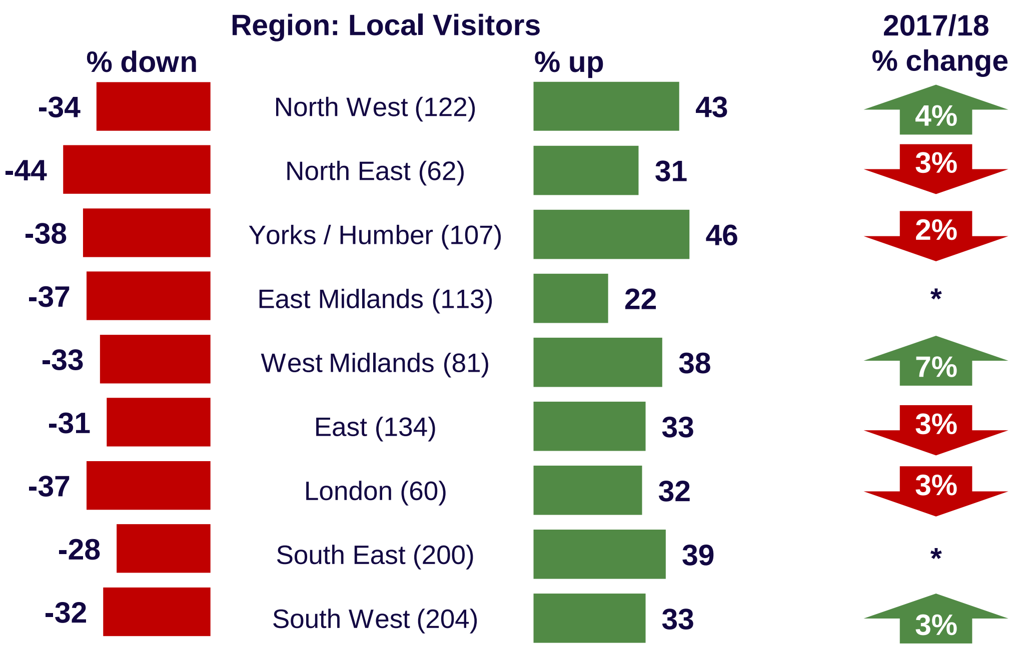
Gardens and Country Parks welcomed more day trippers in 2018 (+7% and +3% respectively), building on their growth in 2017 (+8% and +5% respectively).

However, attractions such as historic sites, leisure/ theme parks and wildlife attractions/zoos attracted fewer day trippers than in 2017 (-3%, -3%, -2% respectively).

Base: All answering local visitor question (1,074)
Base: All attractions providing visits data for current and previous year (1,332)

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

Visitor Admission Trends 2018: Local / Day Trip Visitors by Region



While all regions aside from London grew local/ day trip visits in 2017, the picture was much more mixed in 2018.

Sites in the North West and West Midlands saw growth in the volume of local/ day trip visits, as well as overseas visits (with local/ day trip visits up by +4% and +7% for these regions respectively). The South West region also grew its day trip visits by +3%.

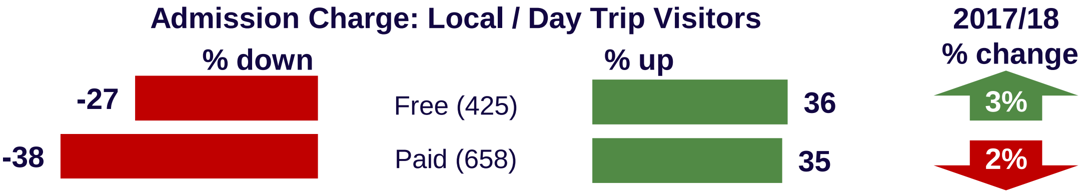
Other regions recorded a similar level of local/ day trip admissions or a decline, when compared to 2017.

Base: All answering local visitor question (1,083)
Base: All attractions providing visits data for current and previous year (1,332)

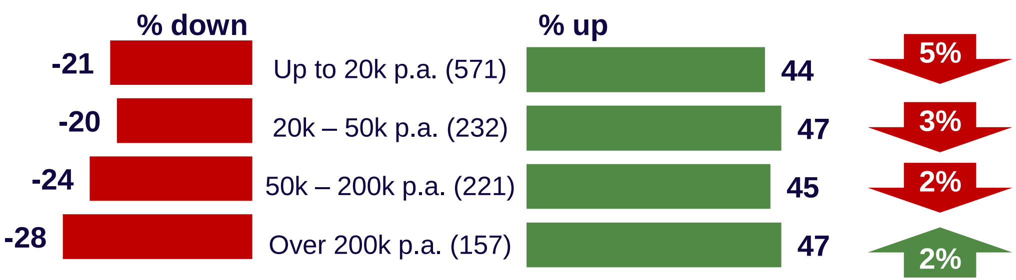
* % change is under 1%, therefore not shown

Visitor Admission Trends 2018: Local / Day Trip Visitors by Admission Charge & Size

Admission Charge: Local / Day Trip Visitors



Size: Local / Day Trip Visitors

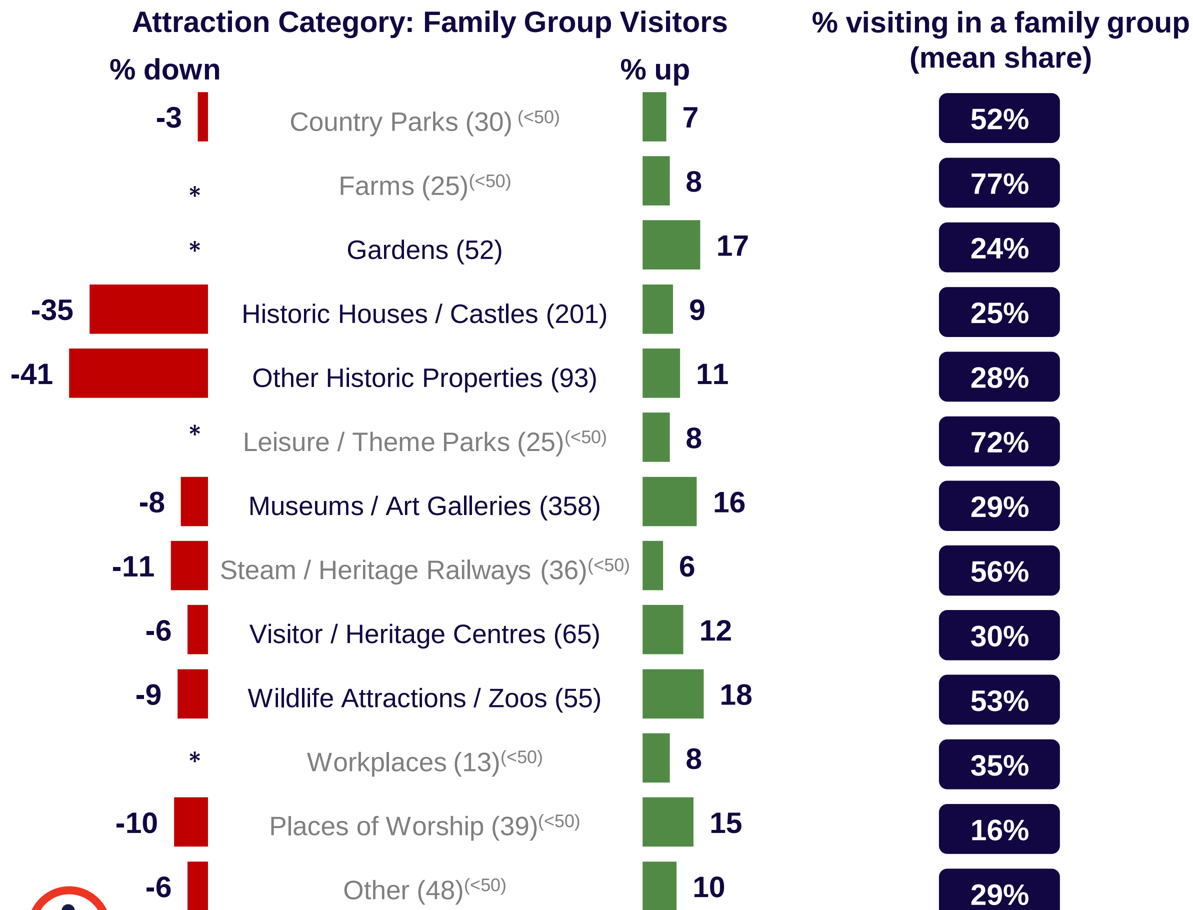


Free attractions fared well with the local/ day trip audience in 2018, welcoming +3% more of these visitors. In contrast, paid attractions saw a contraction of this audience (-2%).

There was a pattern between the size of the attraction and growth of the local/ day tripper market in 2018, with large attractions (with over 200,000 visitors a year) growing this audience by +2%, while smaller attractions saw a decline in visits (50-200k visitors: -2%, 20-50k visitors: -3%, up to 20k visitors: -5%).

Base: All answering local visitor question (1,083)
Base: All attractions providing visits data for current and previous year (1,332)

Visitor Admission Trends 2018: Family Group Visitors by Attraction Category



Intuitively, farms (77%) and leisure / theme parks (72%) were the categories attracting the highest proportion of family groups.

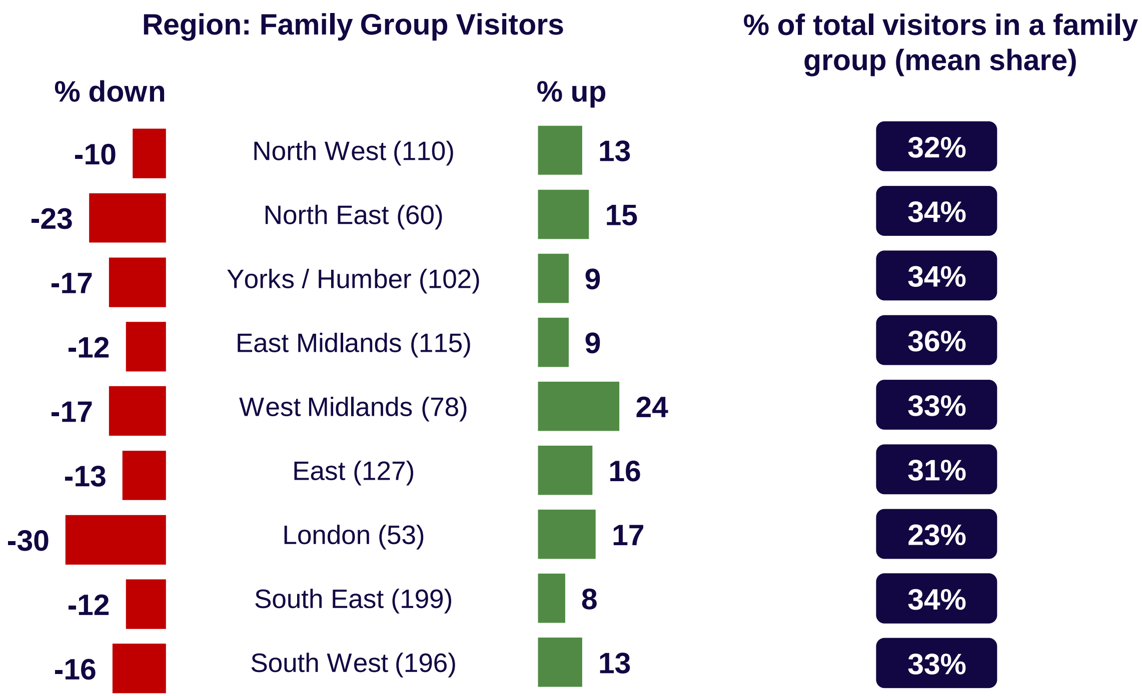
At 16%, places of worship had by far the lowest proportion of family visits.

All other sectors, on average, find that between a quarter and a half of their visitors are families.

Base: All answering family group question (1,040);
Base: All answering family group question (974)

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

Visitor Admission Trends 2018: Family Group Visitors by Region



Less than a quarter of visits to London attractions (23%) were made by families – the lowest of any region, reflecting London's skew towards younger, pre-family, age groups.

The proportions of family visits was fairly consistent in other regions, ranging between 31%-36%.

Family visits have fallen back in a number of regions, in particular London, North East and Yorkshire and the Humber.

Base: All answering family group question (1,040)
Base: All answering family group question (974)

Visitor Admission Trends 2018: Family Group Visitors by Admission Charge & Size

Admission Charge: Family Group Visitors

	% down	% up	% of total visitors in a family group (mean share)
Free (406)	-6	12	32%
Paid (634)	-21	13	33%

Size: Family Group Visitors

	% down	% up	% of total visitors in a family group (mean share)
Up to 20k p.a. (459)	-16	12	23%
20k – 50k p.a. (213)	-19	11	37%
50k – 200k p.a. (198)	-10	13	42%
Over 200k p.a. (149)	-13	19	42%

The difference in the share of family group visits between free and paid attractions in 2018 was negligible.

There is a pattern between attraction size and the proportion of family visits, with larger sites more likely to have attracted a higher incidence of this audience in 2018.

Family visits to paid attractions and those with less than 50,000 visitors a year both decreased in 2018.

Base: All answering family group question (1,040)
Base: All answering family group question (974)

Admission Charge & Revenue Trends

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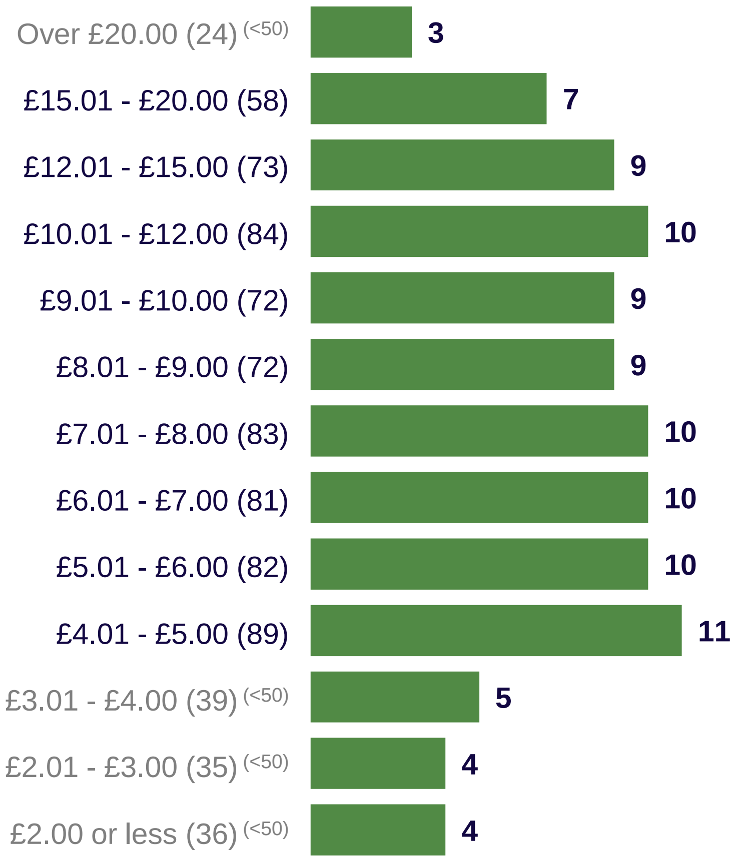
Adult Admission Charges 2018



Adult admission prices continued to increase in 2018, with an average adult entrance price of £8.82.

Fewer than a quarter of attractions (24%) charged £5 or less for adult entry. This continues the downward trend seen in recent years (41% in 2013, 39% in 2014, 35% in 2015, 32% in 2016, 29% in 2017).

29% of attractions charged over £10 for an adult admission ticket in high season in 2018. This remains stable, following several years of this category expanding (2017: 29%, 2016: 27%, 2015: 21%, 2014: 16%).

In 2018, the average child price was £5.44. Consistent with 2017, 36% of charging attractions have an entrance fee of over £5 for child entry.

Base: All answering admission charge question (829)

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

Adult Admission Charge Trends 2018: By Attraction Category

At an overall level adult admission fees increased by +5% in 2018, which is consistent with increases in recent years of between +4% to +6%. This increase exceeds the rate of inflation seen over the same period (3.3%, source: Bank of England, Consumer Price Inflation).

The proportion of paid attractions that charged for child entry remained consistent with recent years at 88%. However, **child admission fees continue to increase at a higher rate than adult charges (+8% in 2018**, which follows increases of +7% in 2017 and +4% in 2016).

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

	All attractions average (+5%)	Average 2018 charge	2016/17 change (%)
ALL ATTRACTIONS (632)	5	£8.82	+4
Country Parks (6)(<10)			+1
Farms (19)(<50)	1	£11.78	+3
Gardens (68)	4	£8.05	+6
Historic Houses / Castles (288)	6	£9.62	+4
Other Historic Properties (90)	6	£7.77	+8
Leisure / Theme Parks (18)(<50)	5	£17.07	+1
Museums / Art Galleries (184)	6	£6.43	+4
Steam / Heritage Railways (35)(<50)	4	£8.90	+7
Visitor / Heritage Centres (31)(<50)	5	£8.03	+5
Wildlife Attractions / Zoos (46)(<50)	5	£12.61	+3
Workplaces (3)(<10)			
Places of Worship (7)(<10)			
Other (34)(<50)	0	£8.88	*

Base: All answering admission charge question in 2018 and 2019 (632)
Base: All answering admission charge question in 2019 (829)

(<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 2018: By Region

All regions in England have seen a rise in average adult admission charges in 2018, ranging between +4 and +10%. These increases equalled or exceeded the 2017 price rises in all regions aside from Yorkshire & The Humber and East Midlands.

The highest increase in admission fees was in London, with a +10% price rise, doubling the one recorded in 2017.

As seen previously, attractions charging for entry in London have the highest admission fees in the country, averaging £11.14. The North West became the second most expensive region (£9.39), overtaking the South East (£9.34).

% change in adult admission charge

	All attractions average (+5%)	Average 2018 charge	2016/17 change (%)
North West (57)	7	£9.39	+4
North East (35)(<50)	6	£7.85	+6
Yorks / Humber (68)	4	£7.78	+6
East Midlands (53)	4	£8.15	+5
West Midlands (61)	4	£8.88	+3
East (79)	5	£7.96	+4
London (29)(<50)	10	£11.14	+5
South East (118)	5	£9.34	+3
South West (132)	6	£8.96	+5

Base: All answering admission charge question (632)
Base: All answering admission charge question (829)

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

Adult Admission Charge Trends 2018: By Attraction Size

There is a strong pattern 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 £6.11 on average, whilst the average admission for sites with over 200,000 visitors was £14.24.

However, it was the mid-sized attractions with 20,001 to 100,000 visitors a year that increased their admission charge the most.

% change in adult admission charge

	All attractions average (+5%)	Average 2018 charge	2016/17 change (%)
20,000 or less p.a. (245)	4	£6.11	+4
20,001 – 50,000 p.a. (148)	6	£7.85	+4
50,001 – 100,000 p.a. (72)	7	£9.90	+4
100,001 – 200,000 p.a. (77)	5	£12.33	+5
Over 200,000 p.a. (90)	5	£14.24	+4

Base: All answering admission charge question (632)
Base: All answering admission charge question (829)

Adult Admission Charge Trends 2018: By Geographic Location & Child Admissions

The gap in the admission charge between rural and urban attractions narrowed in 2018 (average charge of £8.98 and £8.86 respectively). This is the result of urban attractions again applying a larger increase (of +6% in 2018 and 2017 vs. +5% and +3% at rural attractions). Coastal attractions continue to charge less.

Sites that attracted over 30% of their visitors from overseas tend to charge more than those who don't (£13.53 vs. £8.28 on average), and applied a higher increase in admission prices in 2018 (+9% vs. +6%).

As seen previously, attractions with more than 30% child visits typically charge higher adult admission fees than non-family attractions, with fewer than 30% child visits (£10.31 vs. £7.84).

% change in adult admission charge

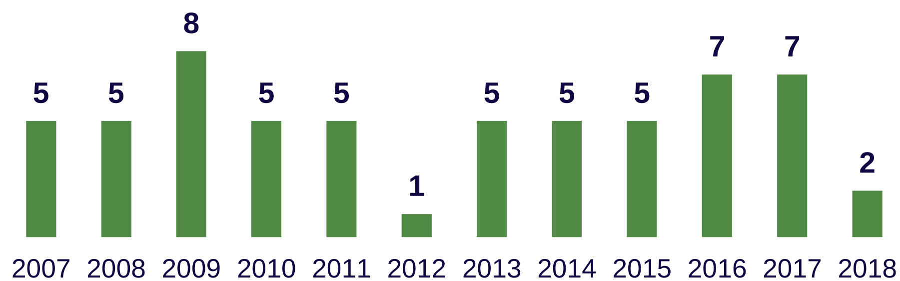
	All attractions average (+5%)	Average 2018 charge	2016/17 change (%)
Coastal (86)	4	£8.02	+5
Rural (381)	5	£8.98	+3
Urban (165)	6	£8.86	+6
Attractions with…			
30% or fewer child visits (350)	7	£7.84	+5
Over 30% child visits (116)	5	£10.31	+6
30% or less overseas visits (440)	6	£8.28	+5
Over 30% overseas visits (31)(<50)	9	£13.53	+6

Base: All answering admission charge question (632)
Base: All answering admission charge question (829)

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

Gross Revenue Trend

% change in gross revenue



% change adult admission charges

At an overall level, the gross revenue at visitor attractions increased by +2% in 2018. This is in line with the growth of visitor admissions, but is lower than revenue increases in most previous years.

The lower increase was driven by fewer attractions growing their revenue: in 2018 35% of attractions reported an increase in gross revenue, while 24% reported a decrease. In contrast, 45% increased their revenue in 2017, with only 14% seeing a fall.

In 2018 revenue was more likely to rise amongst sites that applied a larger increase to their adult admission charge.

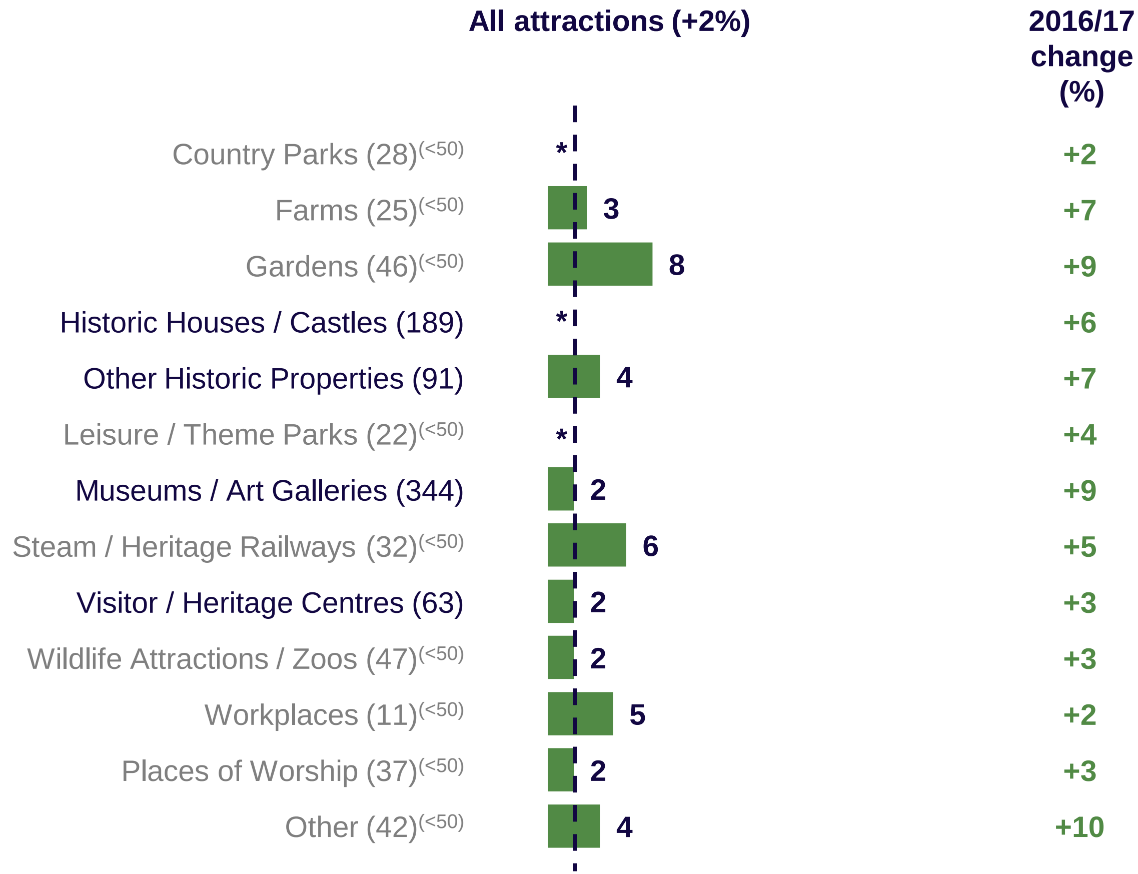
Base: All answering revenue question (977)

Gross Revenue Trend 2018: By Attraction Category

In 2018, all types of attraction increased or equalled their gross revenue from 2017.

Gardens reported the highest increases in gross revenue (+8%), followed by steam / heritage railways (+6%).

Overall revenue remained consistent year on year at historic houses / castles, leisure / theme parks and country parks.



Base: All answering revenue question (977)

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

Gross Revenue Trend 2018: By Region

Strong admissions in the North West region led to increased takings, with revenue up by +9% in 2018, compared with the previous year.

East of England (+4%) and the South East (+3%) also increased their gross revenue more than average.

However, East Midlands (-2%), West Midlands (-1%) and London (-1%) all saw their revenue fall.

- In London this is associated with the fall in family and local/day trip visitors.
- In the East Midlands, this is associated with a fall in family and overseas visitors.
- The picture is less clear for the West Midlands, where the volume of admissions and entrance fees both increased. However, the proportional increase in family visitors may have contributed to lower revenues, due to free/reduced entrance fees for children.

	All attractions (+2%)	2016/17 change (%)
North West (101)	9	+5
North East (51)	*	+6
Yorks / Humber (101)	2	+5
East Midlands (107)	-2	+6
West Midlands (68)	-1	+6
East (123)	4	+7
London (42)(<50)	-1	+10
South East (183)	3	+10
South West (201)	1	+6

Base: All answering revenue question (977)

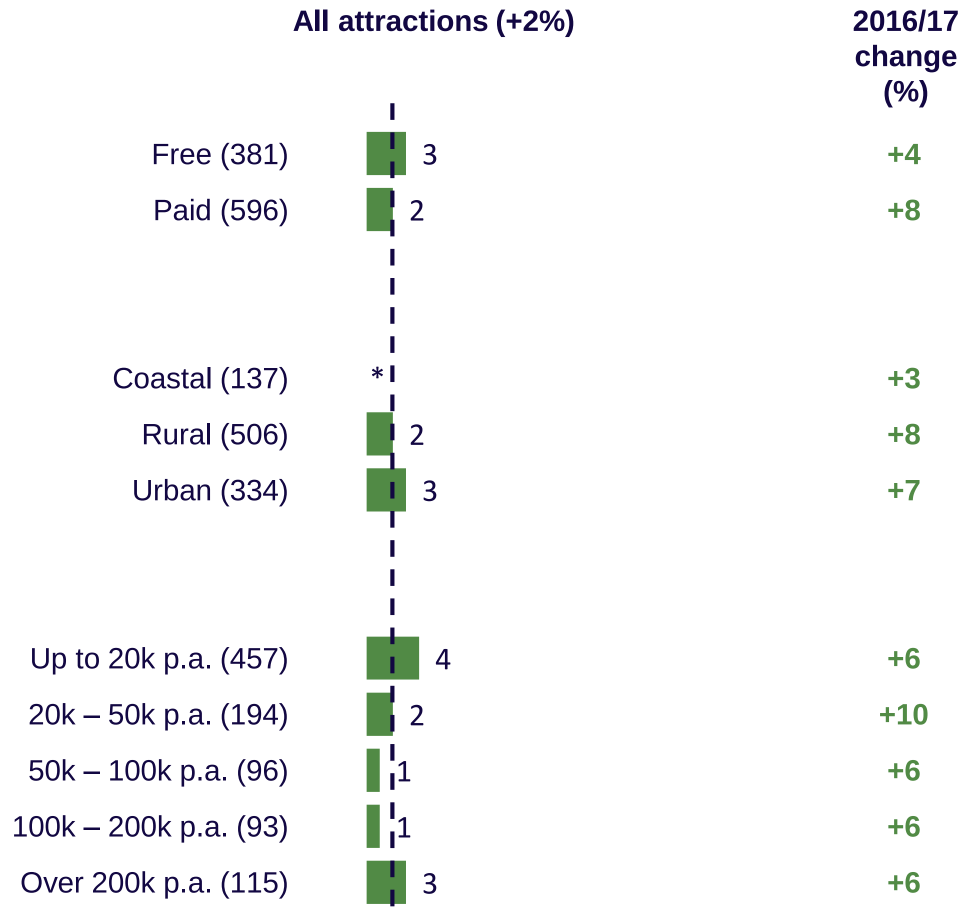
(<50) Base size below 50 (greyed out – please treat with caution)
* % change is under 1%, therefore not shown

Gross Revenue Trend 2018: By Admission Charge, Destination Type & Visit Volume

Although paid attractions overall did not see an increase in visitor admissions, they did see revenue growth (+2%). This was exceeded slightly (+3%) by free attractions, which also managed to grow admissions.

Gross revenue for coastal attractions showed no change, in line with the static visitor admissions for this category.

When grouping attractions by visitor numbers, there is no clear pattern for gross revenue increasing or decreasing.



Base: All answering revenue question (977)

* % change is under 1%, therefore not shown

Marketing & Communications

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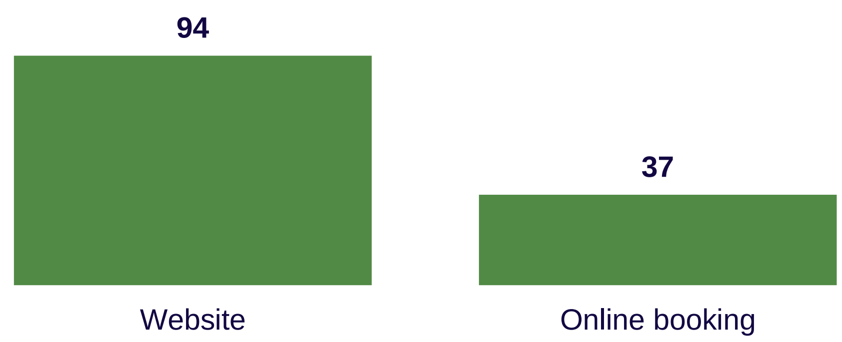
Website & Online Booking Facilities

% offered in 2018



% offered	Website	Online Booking
Under 10k visits p.a.	89	13
10k - 20k visits p.a.	96	26
20k - 100k visits p.a.	96	44
100k - 200k visits p.a.	99	61
Over 200k visits p.a.	98	76
Free attractions	90	31
Paid attractions	96	42

94% of all attractions, (and even 89% of attractions with under 10,000 visitors per annum) had a website in 2018.

Offering online booking facilities remains at 37%, consistent with last year – use of this technology seems to have reached a plateau.

Online booking is more likely to be offered by paid attractions (42%) than free attractions (31%), and the ability to make online bookings also increases with site size (with 76% of sites with over 200,000 visitors using this technology).

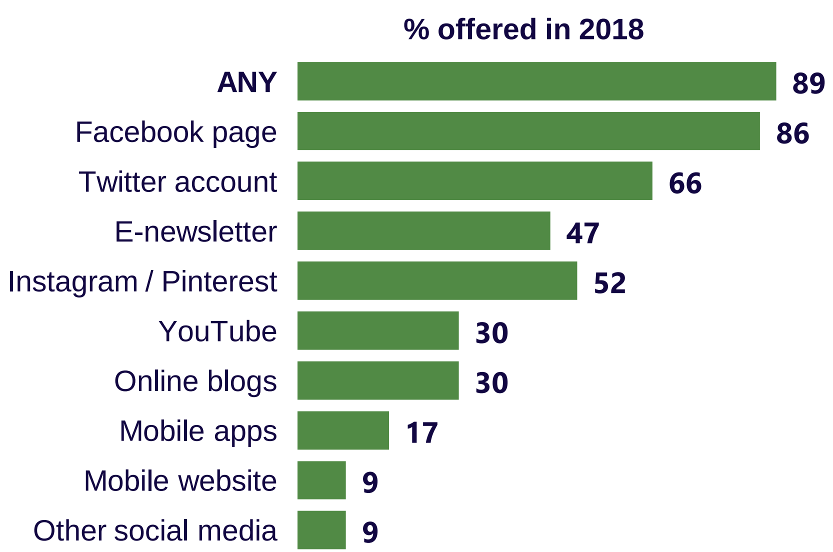
Base: All answering digital communications question (1,195)

Other Digital Communications Offered

Engagement with digital communications has plateaued at 89%. Facebook (86%) and Twitter (66%) continue to be the dominant platforms used by attractions. However, attraction use of Instagram/ Pinterest continues to rise, growing from just 22% of attractions using in 2015 to 52% in 2018.

Use of mobile technology is still limited (17% offer mobile apps, 9% a mobile website), except at historical attractions where app use rises to 47% of historic houses/ castles and 36% of other historic properties.

The suite of digital communications attractions utilise tends to increase according to size.



	%'17	%'16
ANY	89	88
Facebook page	85	82
Twitter account	69	68
E-newsletter	49	47
Instagram / Pinterest	44	36
YouTube	32	31
Online blogs	31	28
Mobile apps	19	20
Mobile website	10	11
Other social media	9	19

% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	**82**	**94**	**98**
Facebook page	78	92	96
Twitter account	49	75	88
E-newsletter	32	50	72
Instagram / Pinterest	34	60	76
YouTube	18	30	54
Online blogs	18	35	47
Mobile apps	12	19	22
Mobile website	3	10	20
Other social media	5	9	16

Base: All answering digital communications question (1,195)

Digital Communications Offered in 2018: By Attraction Category

% offering	Country Parks (<50)	Farms (<50)	Gardens	Historic houses / castles	Other historic properties	Leisure / theme parks (<50)	Museums / art galleries	Steam / heritage railways (<50)	Visitor / heritage centres	Wildlife / zoos	Work-places (<50)	Places of Worship	Other
ANY	83	100	**88**	**92**	**87**	96	**88**	**92**	**89**	**92**	85	**82**	**89**
Facebook	83	100	86	89	84	96	84	92	82	90	85	76	83
Twitter account	58	73	64	80	66	76	63	63	50	69	62	56	57
E-newsletter	33	47	39	64	50	56	44	42	35	48	69	34	33
Instagram/ Pinterest	36	77	58	72	60	68	44	42	31	59	54	34	46
YouTube	8	50	12	47	43	36	27	24	19	39	31	10	15
Online blogs	17	33	22	50	45	24	25	13	16	33	31	12	17
Mobile apps	8	-	7	47	36	12	6	3	11	11	-	4	-
Mobile website	6	3	8	7	10	24	10	5	15	13	-	8	11
Other social media	3	7	10	8	6	12	10	8	7	11	8	4	7
Website	**92**	**97**	**95**	**92**	**91**	**96**	**93**	**100**	**89**	**93**	**92**	**96**	**89**
Online booking	**50**	**47**	**29**	**39**	**24**	**76**	**35**	**63**	**26**	**46**	**38**	**38**	**44**

Base: All answering digital communications question (1,195)

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

Impact of Digital Communications: Summary

	Offer any digital communications (exc. website / online booking)?	
2017 / 18 change in…	**Yes**	**No**
Total visitor admissions	+2%	-2%
Local visits	+1%	-5%
Schoolchildren visits(<50)	+1%	-28%
Gross revenue	+2%	+1%

Attraction use of digital communications is associated with growth in visitor admissions, with those utilising these platforms reporting a 2% increase in visitor admissions for 2018, compared with the -2% amongst those who did not.

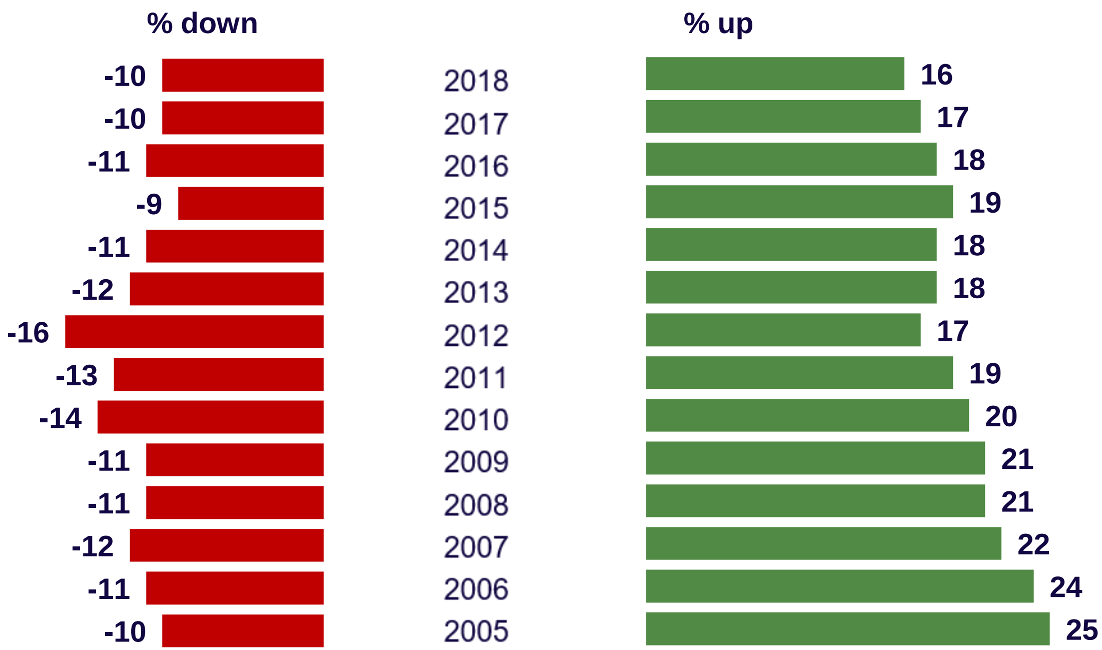
Attractions saw an increase in gross revenue – both those offering digital communications and those not – although the increase in gross revenue was slightly higher for those offering digital communications (+2% compared to +1%).

Those offering digital communications saw increases in local visits and schoolchildren visits, whereas those not offering digital communications saw decreases for both.

Base: All answering digital communications question (1,195)

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

Marketing Expenditure Trend



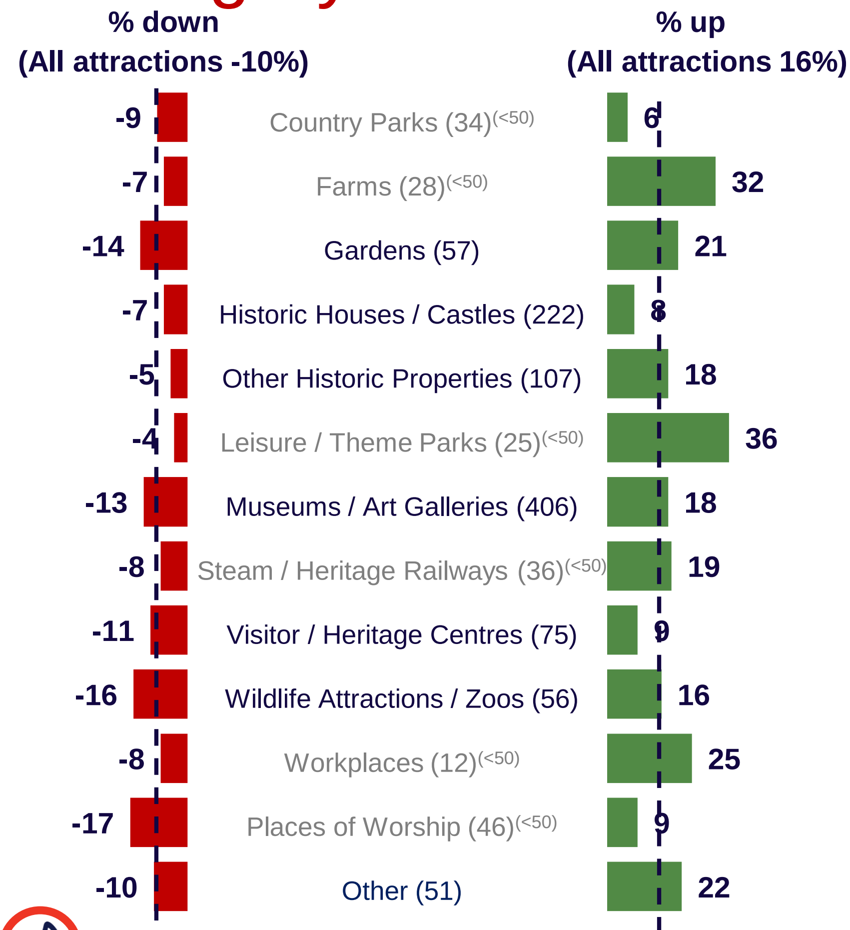
The change in marketing expenditure has remained fairly consistent since 2012, but is at the lower end of the spectrum when looking at the longer term trend.

A net of 6% of attractions increased their marketing spending in 2018 (based on 16% increasing, minus 10% decreasing spend).

Marketing spend increased to the greatest extent for attractions with 50,001-200,000 visitors a year.

Base: All answering marketing question (1,155)

Marketing Expenditure Trends 2018: By Attraction Category



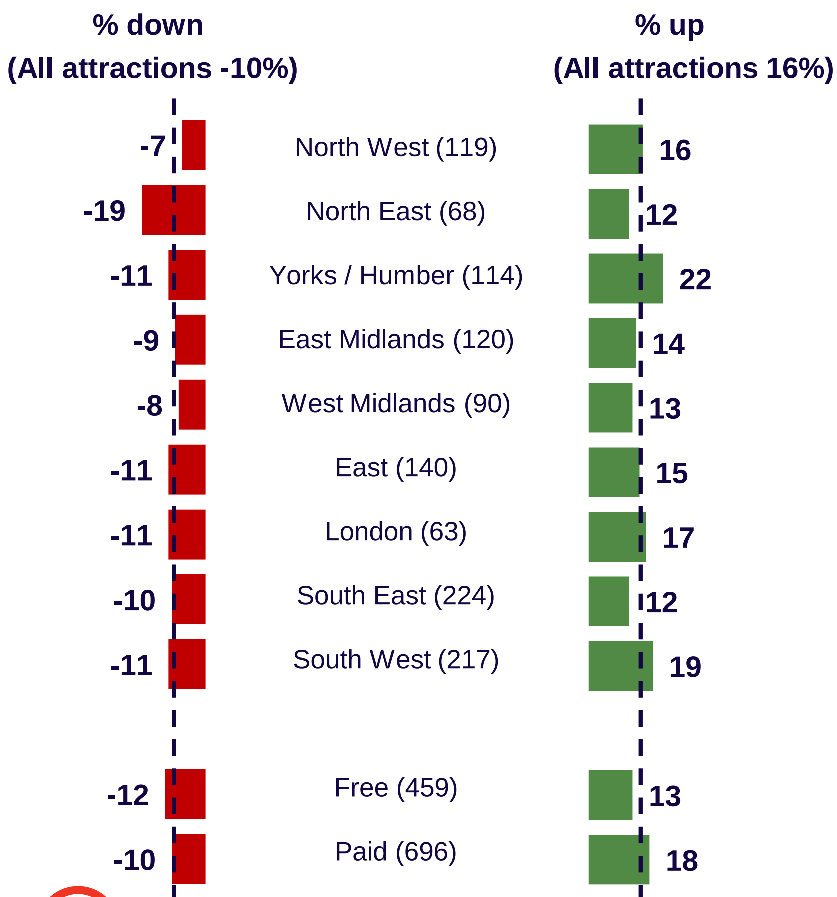
Farms and leisure / theme parks are once again the attraction types most likely to have increased their marketing spend (32% and 36% respectively).

Places of worship and wildlife attractions/ zoos are the sectors most likely to have cut their marketing spend (with 17% and 16% reducing spend respectively).

Base: All answering marketing question (1,155)

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

Marketing Expenditure Trends 2018: By Region & Admission Charge



Attractions based in Yorkshire and the Humber were the most likely to have increased their marketing expenditure in 2018, with 22% of sites in the region doing so. This may be a reaction to the region's success in 2017 when Hull was the 'City of Culture'.

The North East was the only area reporting a net reduction in marketing spend.

Paid attractions (18%) are more likely than free sites (13%) to have increased their marketing spend – a trend that remains consistent with previous years.

Base: All answering marketing question (1,155)

Impact Of Marketing Expenditure: Summary

	Marketing spend in 2018	
2017 / 18 change in…	**Up**	**Down**
Total visitor admissions	+3%	-5%
Local visits	+3%	-3%
Overseas visits	*	-10%
Schoolchildren visits	-2%	-2%
Gross revenue	+8%	-1%

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.

These differences were quite distinct in 2018. Those sites increasing their marketing spend increased admissions by +3%, compared with a decline of -5% amongst those who cut budgets. Similarly revenue increased by 8% on average amongst those increasing their marketing budget, whereas reductions were associated with an overall drop of -1% in gross revenue.

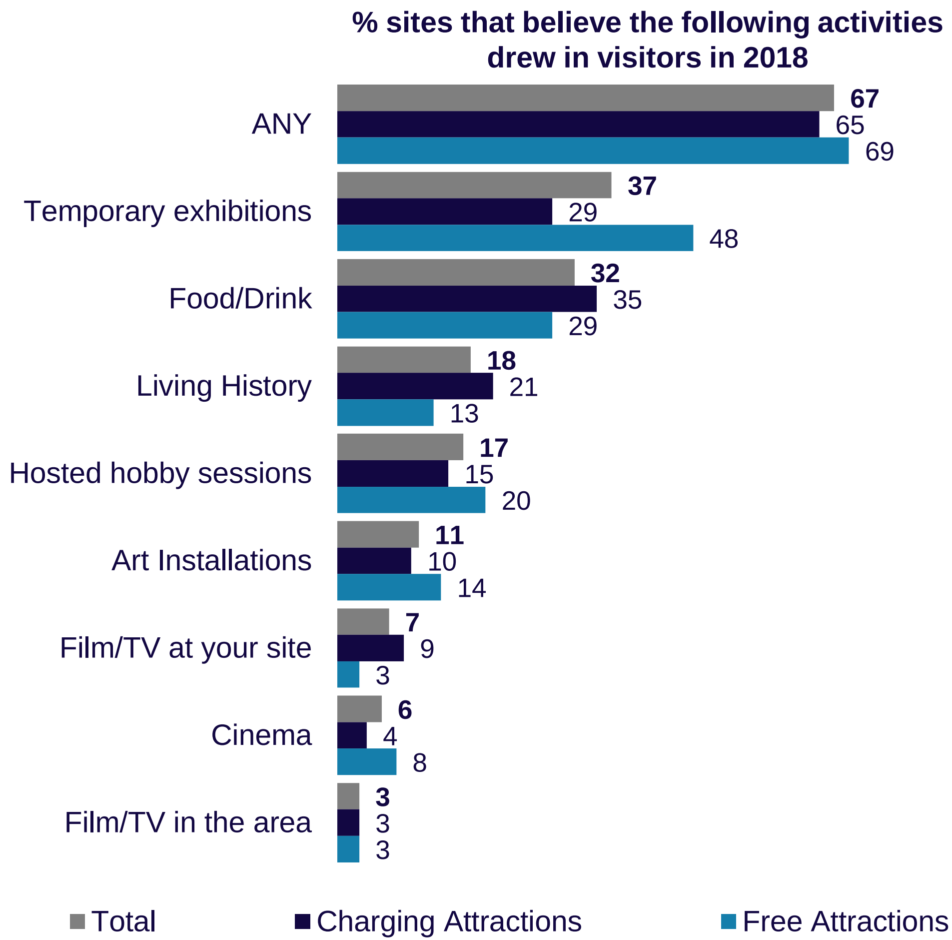
Attractions that increased marketing spend saw an increase in local visits and a similar number of overseas visits in 2018, whilst attractions that decreased marketing spend saw decreases for both.

Base: All answering marketing question (1,155)

* % change is under 1%, therefore not shown

Additional Draws to Visit

Additional draws to visit beyond main offer in 2018



Free and charging sites both engage in a variety of additional activities in order to enhance the visitor experience.

The most commonly mentioned additional draw to visit at free attractions is temporary exhibitions, with nearly half (48%) saying this helped them to attract visitors in 2018. This is followed by a catering offer (29%), hosted hobby sessions (20%) and art installations (14%) which attractions listed as an additional draw to their site.

Nearly as many charging as free attractions believe that extending their offer helped to draw in additional visitors, but the importance of these additional draws varies. **At charging attractions catering (35%) is seen as the most important additional draw**, followed by temporary exhibitions (29%) and 'living history' e.g. live interpreters (21%).

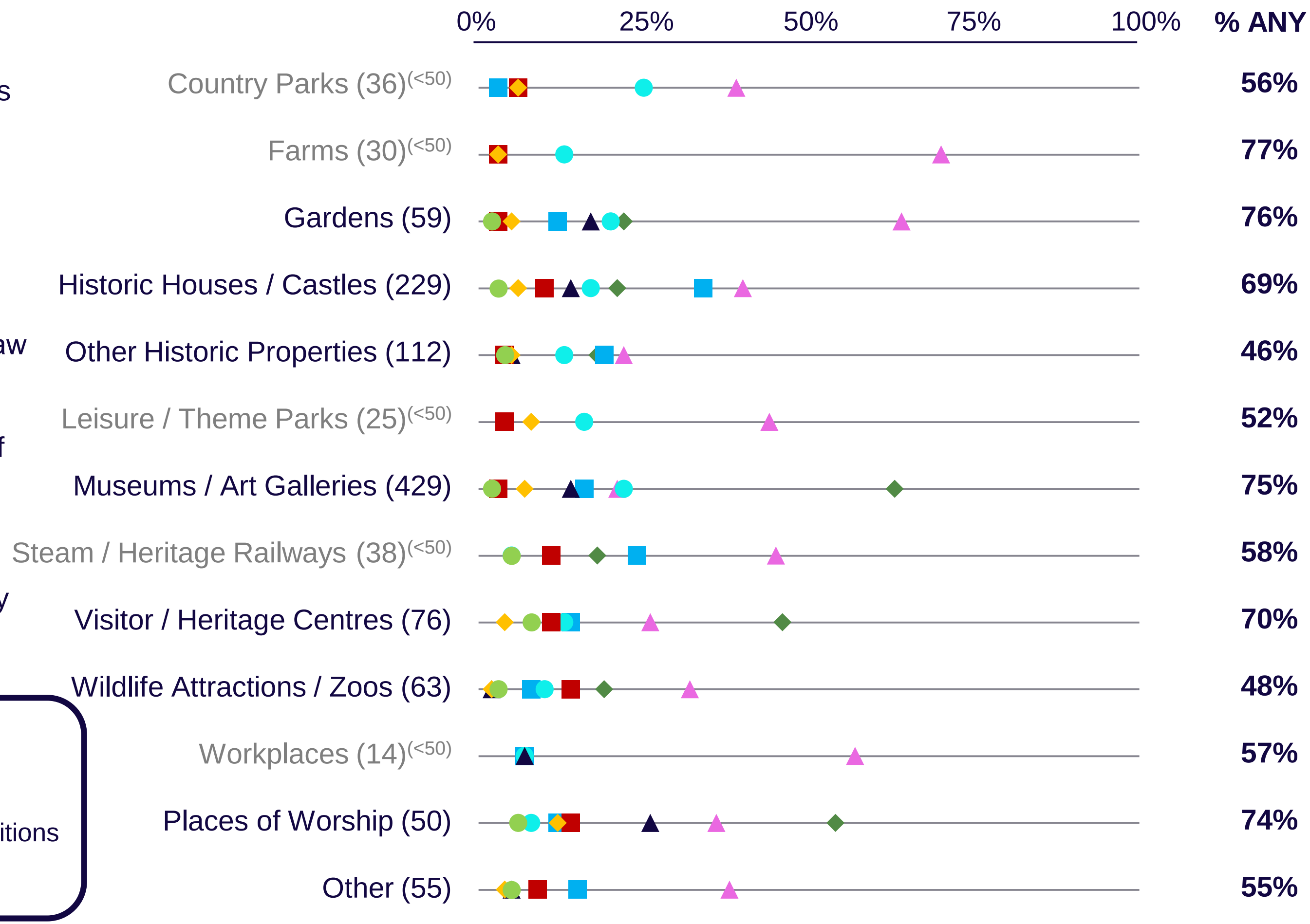
Base: All answering additional activities question (1,216)

Additional draws to visit in 2018: By Attraction Category

At least half of sites in each sector (except 'other historic properties, at 46%) mentioned additional activities that drew in visitors to their site during 2018. However, the types of activity engaged in as an additional draw varied between sectors.

For example, temporary exhibitions are currently cited as a reason for drawing in additional visitors most commonly by museums/galleries, visitor/heritage centres and places of worship, whereas 'living history' is cited as an additional draw most commonly for historic properties and steam/heritage railways. The catering offer is mentioned as a draw for visitors across all types of attraction, in particular farms and gardens.

Each activity is cited as a reason for drawing in visitors by at least some attractions in almost every category.



Base: All answering additional activities question (1,216)

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

Additional draws to visit in 2018: By Visitor Volume

	Visit Volume				
% offering	Under 10k	10k-20k	20k-50k	50k-100k	Over 100k
ANY (2018)	**55**	**74**	**72**	**75**	**76**
Temporary exhibitions	33	38	38	40	43
Food/ Drink	17	33	36	48	46
Living History	9	23	23	29	19
Hosted hobby sessions	10	14	22	24	23
Art Installations	5	9	9	14	22
Film/ TV at your site	5	6	7	6	11
Cinema	2	2	5	7	13
Film/ TV in the area	3	5	4	3	3

For the smaller sites, with less than 10k visitors a year, over half cite at least one additional activity as a draw for additional visits in 2018. Temporary exhibitions are the most mentioned activity as a reason for driving visits.

For sites with over 10k visitors a year, at least 70% of attractions cite at least one additional activity as a draw for additional visits in 2018.

Base: All answering additional activities question (1,216)

Additional draws to visit in 2018: By Region

Temporary exhibitions are put down as the biggest additional draw to visit across the majority of England, with over a third of sites in every region having offered this at some point during 2018 and put it down as drawing additional visitors. This is followed closely by the catering offer being a draw, although this is put down less consistently across regions (ranging from 25% of London attractions, to 42% of those in the North West) as being something that draws additional visitors.

North West attractions are the most likely to cite an additional activity as a reason that that draws in visitors, with 73% of sites in this region doing so. Temporary exhibitions (46% of sites), food & drink (42%) and installations (19%) are more likely to be mentioned by NW attractions than elsewhere. In contrast, North East and West Midlands are more likely to cite hobby sessions (both 27%) and 'living history' (27% NE, 30% WM) as a draw for visitors.

	Region (%)								
% that believe offering these activities drew in visitors in 2018	NW	NE	Y+H	EM	WM	EAST	LON	SE	SW
ANY (2018)	**73**	**70**	**70**	**65**	**66**	**63**	**66**	**63**	**67**
Temporary exhibitions	**46**	34	38	34	33	38	**49**	34	33
Food/ Drink	**42**	29	32	30	34	34	25	29	33
Living History	20	**27**	13	24	**30**	15	11	15	15
Hosted hobby sessions	20	**27**	22	15	**27**	11	14	14	14
Art Installations	**19**	11	11	5	**17**	11	14	10	9
Film/ TV at your site	6	10	6	6	3	4	**14**	6	8
Cinema	6	3	4	**10**	**10**	5	**14**	3	3
Film/ TV in the area	2	3	6	2	-	2	2	1	8

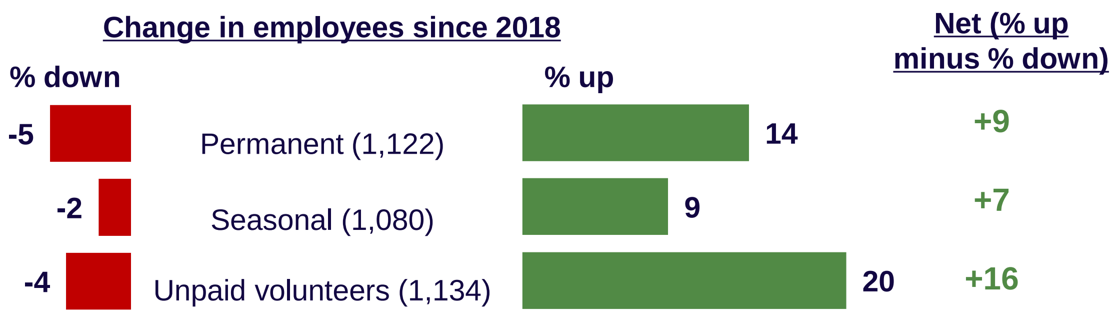
Base: All answering additional activities question (1,216)

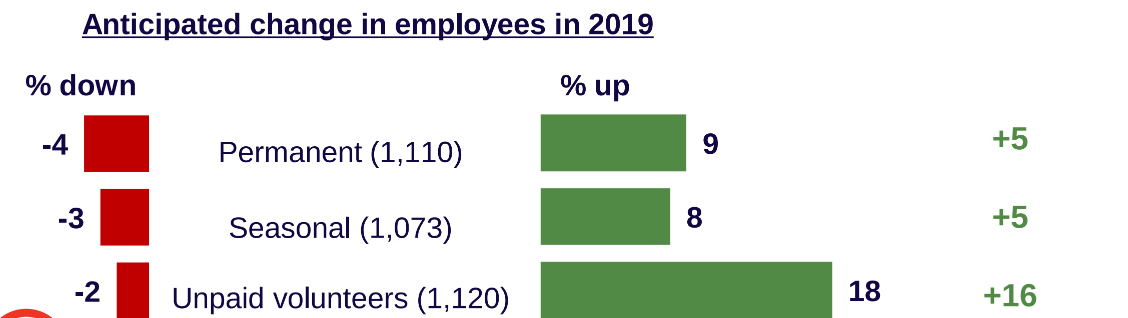
Employment Trends

VisitEngland BVA BDRC

Employment Trends

Proportion of attractions employing each type of employees	
Permanent staff	85%
Seasonal staff	66%
Unpaid volunteers	87%





Employment within the attractions sector has remained buoyant, with more sites increasing permanent, seasonal and volunteer staff than those reducing.

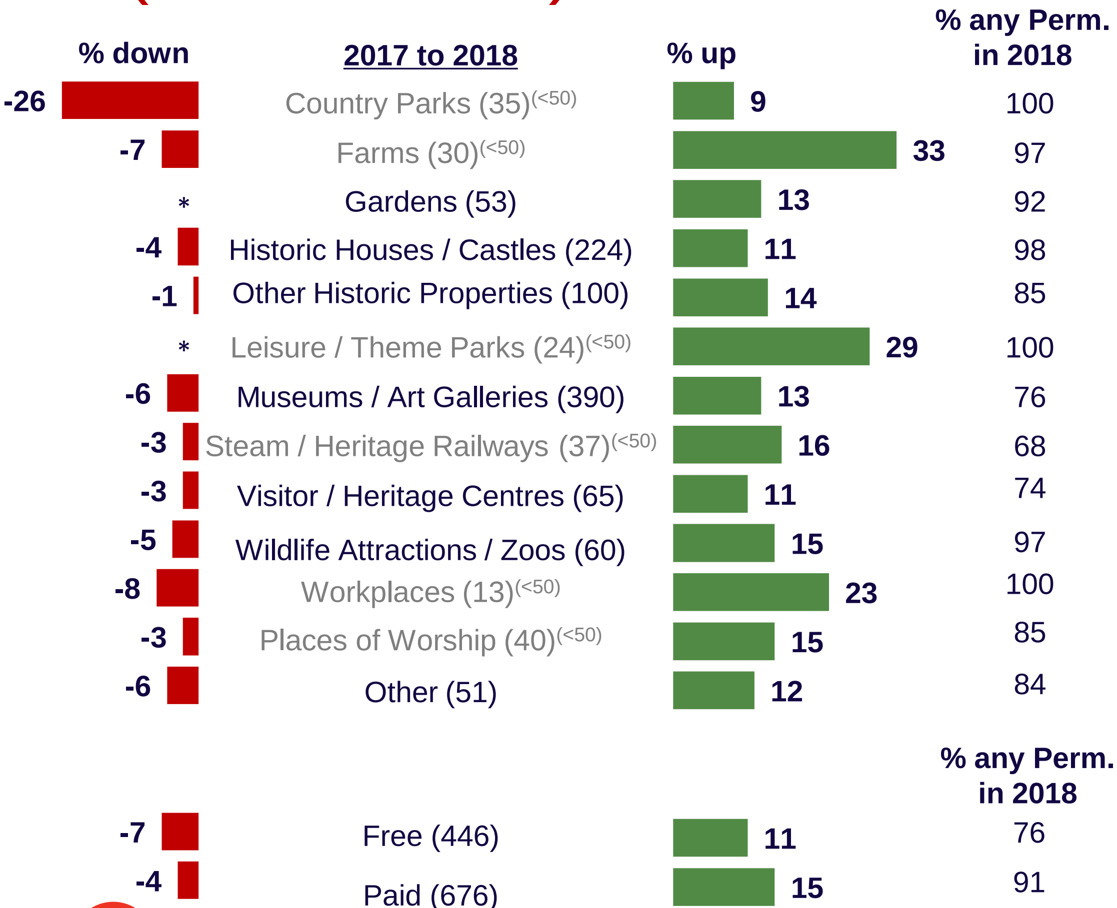
Once again the largest growth is seen in unpaid volunteers, with 20% of attractions having increased their staffing in this area, compared with only 4% that have seen a reduction. With 87% of attractions relying on unpaid helpers, and further expansion anticipated in 2019, competition for volunteer time is notable and growing.

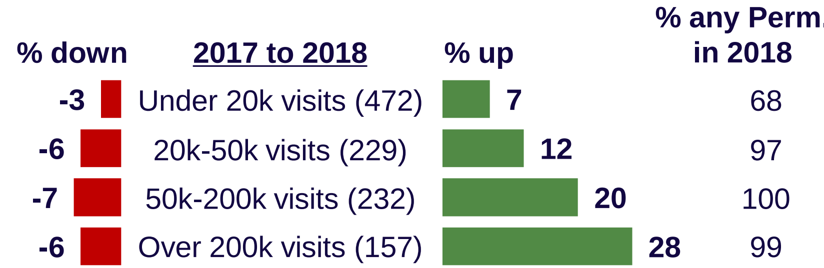
Employee numbers also grew in 2018, with a net increase (% up - % down) in permanent staff of +9 and for seasonal staff of +7.

The number of paid staff is anticipated to increase further in 2019, albeit at a slower rate.

Base: All answering employment questions (c.1,100)

Employment Trends: Permanent Employees Summary (2017 - 2018)





All sectors increased their permanent staffing levels overall, with the exception of Country Parks which saw a net (% up - % down) reduction of -17. The net position is highest for leisure/ theme parks (+29) and farms (+26).

Consistent with previous years, we see a larger net increase for paid attractions (+11) than those that are free to enter (+4).

When grouping attractions by visitor numbers, attractions with higher numbers of visitors saw greater increases in net permanent staffing levels in 2018. This year the net increase was +22 for sites with over 200,000 visitors (vs. the attractions average of +9).

Base: All answering employment questions (c.1,100)

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

Employment Trends: Permanent Employees Summary (2019 Predictions)

% down	2019 predictions	% up
-14	Country Parks (35)(<50)	25
-7	Farms (29)(<50)	21
-2	Gardens (53)	13
-2	Historic Houses / Castles (222)	7
-2	Other Historic Properties (100)	3
*	Leisure / Theme Parks (24)(<50)	33
-5	Museums / Art Galleries (384)	29
-3	Steam / Heritage Railways (36)(<50)	14
-3	Visitor / Heritage Centres (64)	14
-12	Wildlife Attractions / Zoos (60)	10
*	Workplaces (13)(<50)	23
-5	Places of Worship (40)(<50)	10
-8	Other (50)	10

% down		% up
-5	Free (437)	8
-4	Paid (673)	11

% down	2019 predictions	% up
-3	Under 20k visits (467)	6
-5	20k-50k visits (228)	11
-5	50k-200k visits (230)	12
-8	Over 200k visits (153)	13

Following the strengthening in their admissions in 2018, museums/galleries are bullish about their permanent staffing prospects for 2019.

Wildlife attractions/ zoos are the only sector to predict a negative change (a net decline of 2%).

Paid sites are more likely to predict an expansion of their permanent staff team than free sites.

Base: All answering employment questions (c.1,100)

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

Employment Trends: Seasonal Employees Summary (2017 - 2018)

% down	2017 to 2018	% up	% any Seasonal in 2018
-3	Country Parks (33)(<50)	15	64
*	Farms (30)(<50)	37	100
-2	Gardens (51)	20	82
-2	Historic Houses / Castles (217)	8	88
*	Other Historic Properties (99)	7	75
-9	Leisure / Theme Parks (23)(<50)	30	100
-2	Museums / Art Galleries (371)	5	44
-3	Steam / Heritage Railways (36)(<50)	14	56
-2	Visitor / Heritage Centres (63)	8	59
-5	Wildlife Attractions / Zoos (59)	14	81
*	Workplaces (12)(<50)	25	75
*	Places of Worship (35)(<50)	6	54
-6	Other (51)	4	69

% down		% up	% any Seasonal in 2018
-1	Free (423)	6	46
-3	Paid (657)	12	79

% down	2017 to 2018	% up	% any Seasonal in 2018
-1	Under 20k visits (450)	3	47
-4	20k-50k visits (223)	9	76
-2	50k-200k visits (223)	13	81
-3	Over 200k visits (154)	25	85

Overall, the increases reported in seasonal staff mirrors that of permanent employees.

There may be a migration from seasonal to permanent staff at some leisure/ theme parks, as 9% cut seasonal staff, while there were only increases reported for permanent staff.

Consistent with permanent staffing, it is the largest attractions (with 200k+ visitors), and those that charge an entrance fee, that are most likely to report change in seasonal staff.

Base: All answering employment questions (c.1,100)

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

Employment Trends: Seasonal Employees Summary (2019 Predictions)

% down	2019 predictions	% up
-6	Country Parks (34)(<50)	18
-3	Farms (29)(<50)	31
-2	Gardens (51)	16
-3	Historic Houses / Castles (218)	5
*	Other Historic Properties (99)	8
-9	Leisure / Theme Parks (23)(<50)	30
-2	Museums / Art Galleries (365)	4
-3	Steam / Heritage Railways (35)(<50)	9
-5	Visitor / Heritage Centres (63)	5
-10	Wildlife Attractions / Zoos (59)	14
*	Workplaces (12)(<50)	8
*	Places of Worship (36)(<50)	3
-2	Other (50)	10

% down		% up
-2	Free (414)	5
-4	Paid (659)	10

% down	2019 predictions	% up
-2	Under 20k visits (448)	5
-5	20k-50k visits (224)	8
-4	50k-200k visits (219)	9
-3	Over 200k visits (151)	16

With the exception of workplaces (note the small sample size), predictions for seasonal staffing levels are largely in line with the performance seen in 2018.

Leisure/ theme parks (net +21) and farms (net + 28) are the most bullish, but the predictions are for a net increase in seasonal staffing in all sectors.

Once again, paid sites and larger sites predict greater change in temporary staffing levels.

Base: All answering employment questions (c.1,100)

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

Employment Trends: Unpaid Volunteers Summary (2017 - 2018)

% down	2017 to 2018	% up	% any Volunteers in 2018
-6	Country Parks (35)(<50)	26	83
*	Farms (29)(<50)	31	76
-9	Gardens (54)	28	78
-4	Historic Houses / Castles (215)	14	93
-2	Other Historic Properties (105)	14	83
*	Leisure / Theme Parks (19)(<50)	*	26
-5	Museums / Art Galleries (404)	22	93
-3	Steam / Heritage Railways (38)(<50)	24	89
-4	Visitor / Heritage Centres (70)	29	89
-4	Wildlife Attractions / Zoos (57)	26	91
-9	Workplaces (11)(<50)	9	36
-7	Places of Worship (46)	17	100
-4	Other (51)	14	51

% down		% up	% any Volunteers in 2018
-5	Free (463)	22	90
-3	Paid (671)	19	85

% down	2017 to 2018	% up	% any Volunteers in 2018
-5	Under 20k visits (507)	17	88
-6	20k-50k visits (221)	17	89
-2	50k-200k visits (222)	27	86
-3	Over 200k visits (153)	30	83

Almost all sectors have extended their use of volunteers in 2018.

Free attractions are more likely to work with volunteers than paid attractions, with 90% of attractions using them in 2018.

In 2018, attractions with over 200,000 visitors were the most likely to increase their volunteer bank, with 83% of large sites now using them, up from 75% in 2017.

Base: All answering employment questions (c.1,100)

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

Employment Trends: Unpaid Volunteers Summary (2019 Predictions)

% down	2019 predictions	% up
-3	Country Parks (34)(<50)	44
-4	Farms (28)(<50)	25
*	Gardens (54)	20
-2	Historic Houses / Castles (215)	13
*	Other Historic Properties (104)	14
*	Leisure / Theme Parks (19)(<50)	11
-3	Museums / Art Galleries (393)	18
-3	Steam / Heritage Railways (38)(<50)	13
-4	Visitor / Heritage Centres (70)	16
-4	Wildlife Attractions / Zoos (57)	19
-10	Workplaces (10)(<50)	*
*	Places of Worship (47)(<50)	19
-4	Other (51)	20

% down		% up
-2	Free (449)	21
-2	Paid (671)	15

% down	2019 predictions	% up
-3	Under 20k visits (510)	14
-3	20k-50k visits (216)	18
-2	50k-200k visits (219)	20
-1	Over 200k visits (145)	26

Almost all categories (bar workplaces – which has a low sample size) expect to be able to recruit more volunteers next year.

Country parks are keen to welcome new volunteers, with over two fifths (44%) expecting to increase the number of unpaid staff.

Free sites, and those with 200,000 visitors or more are expecting to make a bigger push on recruitment efforts.

Base: All answering employment questions (c.1,100)

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

Appendix

Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2018

Please help VisitEngland establish trends in the attractions' sector in 2018 by taking part in our major annual survey, conducted by BVA Group, supported by with 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 **3rd May 2019** 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 2017, 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 2017 visitor numbers:

2.2 **What were your visitor numbers during the 2018 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 2018 (paid and free) fell into each category?** Adults %

Children %

TOTAL 100%

2.4 For 2017, 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 2018?

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

2.5 **Did you charge for admission to the main attraction in 2018?** Yes ☐ No ☐

2.6 **Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2018 (including VAT):** Adult £ . p (£ in 2017) Child £ . p (£ in 2017)

2.7 **Origin of visitors:**

(a) For 2017, your organisation provided us with a percentage of visitors from overseas of %

i) What percentage of total visitors in 2018 do you estimate were from overseas? %

ii) Compared with 2017, was the number of visitors from overseas in 2018: Up ☐ Down ☐ Similar ☐

(b) For 2017, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2018 do you estimate lived locally or within day trip distance of your attraction? %

ii) Compared with 2017, was the number of visitors living locally or within day trip distance in 2018:

Up ☐ Down ☐ Similar ☐

2.8 i) What percentage of your total visitors in 2018 do you estimate visited your attraction as part **of a family group** (i.e. visited with children aged under 18)? %

ii) Compared with 2017, was the number of family group visitors in 2018:

Up ☐ Down ☐ Similar ☐

SECTION THREE – OPERATIONS/MARKETING

3.1 **Gross revenue**

(a) How did the attraction's gross revenue in 2018 compare with 2017? Up ☐ Down ☐ Similar ☐

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

3.2 **Aside from the main attraction offer, which of the following do you think drew visitors to your site during 2018?**

The food/drink on offer *(e.g. lunches, afternoon tea)* ☐	Temporary exhibitions ☐	Film/ TV series filmed at your site ☐
Living history *(e.g. actors / re-enactments)* ☐	Hosted hobby sessions *(e.g. sports, crafts)* ☐	Film/ TV series filmed in the area ☐
Art installations *(e.g. sculpture trail)* ☐	Cinematic screenings ☐	None of these ☐

3.3 **Compared with 2017, was expenditure on marketing activities in 2018:** Up ☐ Down ☐ Similar ☐

3.4 **Which of the following digital communications did your main attraction offer in 2018?**

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 ☐

3.5 **In 2018, was your main attraction................?**

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

SECTION FOUR – HUMAN RESOURCES

4.1 **Compared with 2017, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2018 (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 2018, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2019 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.

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

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

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

5.4 **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 **3rd May 2018** 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: Humphrey Walwyn (VisitEngland, t: 0207 578 1467, e: annualattractionssurvey@visitengland.org) or Katie Vosper (BVA BDRC), e: annualattractionssurvey@bva-bdrc.com)