

## ENGLAND ATTRACTIONS MONITOR

### QUARTER 1 REPORT – JANUARY TO MARCH 2006

#### 1.0 Introduction

There is little official national data produced that gives an indication of how the attractions sector is performing throughout the year. In January 2006, VisitBritain commissioned BDRC to launch and manage the England Attractions Monitor, an online panel to help provide the attractions industry with rapid feedback on current trends in visits to attractions in England.

#### 2.0 Method

Invitations to participate in the England Attractions Monitor were sent via email to all attractions in England where a contact email address was held. The questionnaire asks attractions to submit their visitor figures (paid and free) for each month within each quarter and to indicate whether total figures for the quarter overall are higher than, lower than, or about the same as the same period the previous year. Where regional tourism organisations collect their own admissions data from attractions on a monthly basis, their data has been shared with BDRC and incorporated within this monitor. We are grateful for their ongoing cooperation within this study.

#### 3.0 Summary of findings for Quarter 1 (January to March 2006)

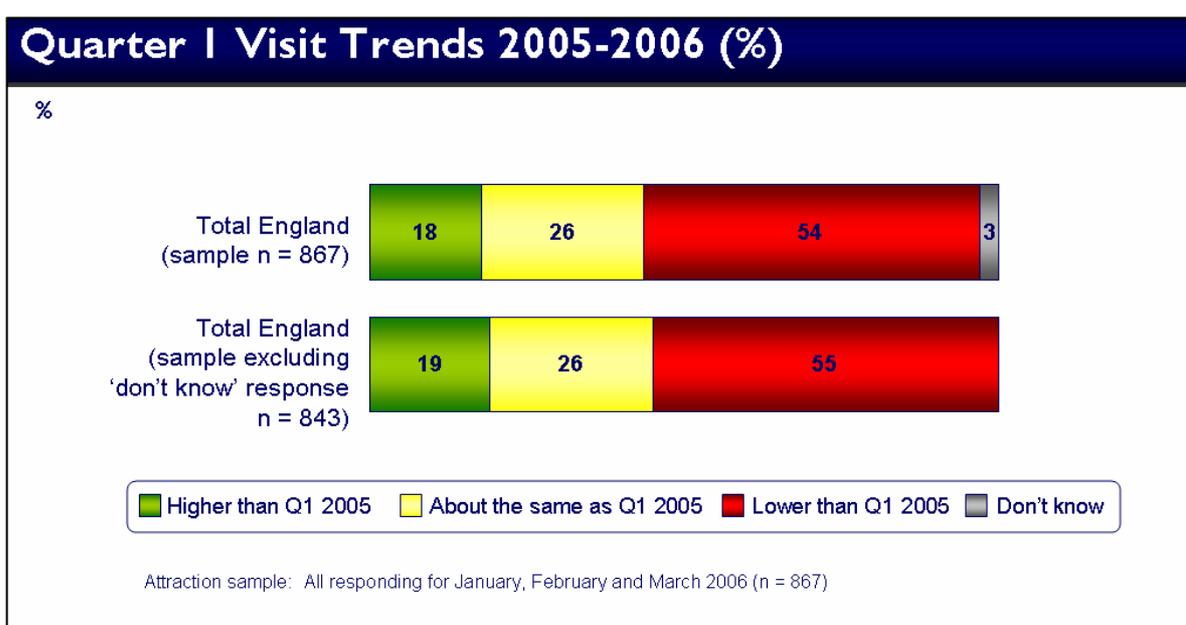
This is a summary report of the findings for the Quarter 1 (January to March 2006) period.

The Easter 2005 holiday period occurred during the Quarter 1 2005 period (January to March 2005). However, the Easter 2006 holiday period falls during the Quarter 2 period (April to June 2006). Therefore, a year-on-year decline in admissions for the Quarter 1 period was common since many attractions:

- were closed in Quarter 1 2006, but opened for Easter in Quarter 1 2005;
- rely on high footfall during Easter.

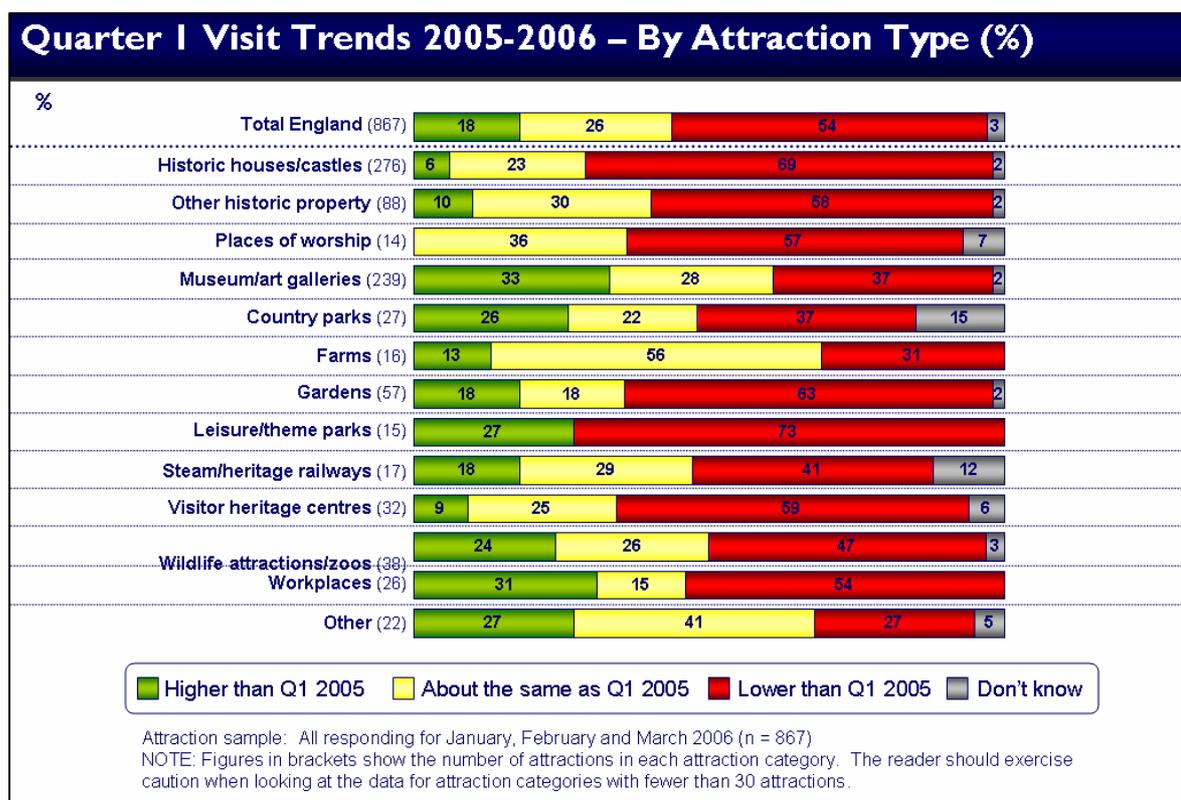
A total of 882 attractions took part in the England Attractions Monitor in Quarter 1 2006, with a wide cross-section of responses achieved across regions and by attraction category type. The number of attractions taking part in the panel will vary across the year as other attractions join, whilst others drop out. However, comparisons will always be made among constant samples.

#### 4.0 Quarter 1 Visit Trends 2005-2006 (%)



Approximately half (54%) of those attractions who provided visitor numbers for January, February and March 2006 recorded fewer visitors during Quarter 1 2006 compared to Quarter 1 2005. This year-on-year fall is due primarily to the Easter period falling during the Quarter 1 2005 period (January to March), but within the Quarter 2 2006 period (April to June).

## 5.0 Quarter 1 Visit Trends 2005-2006 – By Attraction Type (%)



The chart above shows year-on-year changes in visitor numbers by attraction type. It is based on the 867 attractions that provided visitor figures for January, February and March 2006.

The majority of attraction categories experienced a fall in visitor numbers between Quarter 1 2005 and Quarter 1 2006, again due to the impact of the timing of Easter.

Leisure/theme parks, which represent around 2% of all attractions in the sample, were most likely to have experienced a drop in visitor numbers between the two Quarter 1 periods (73%).

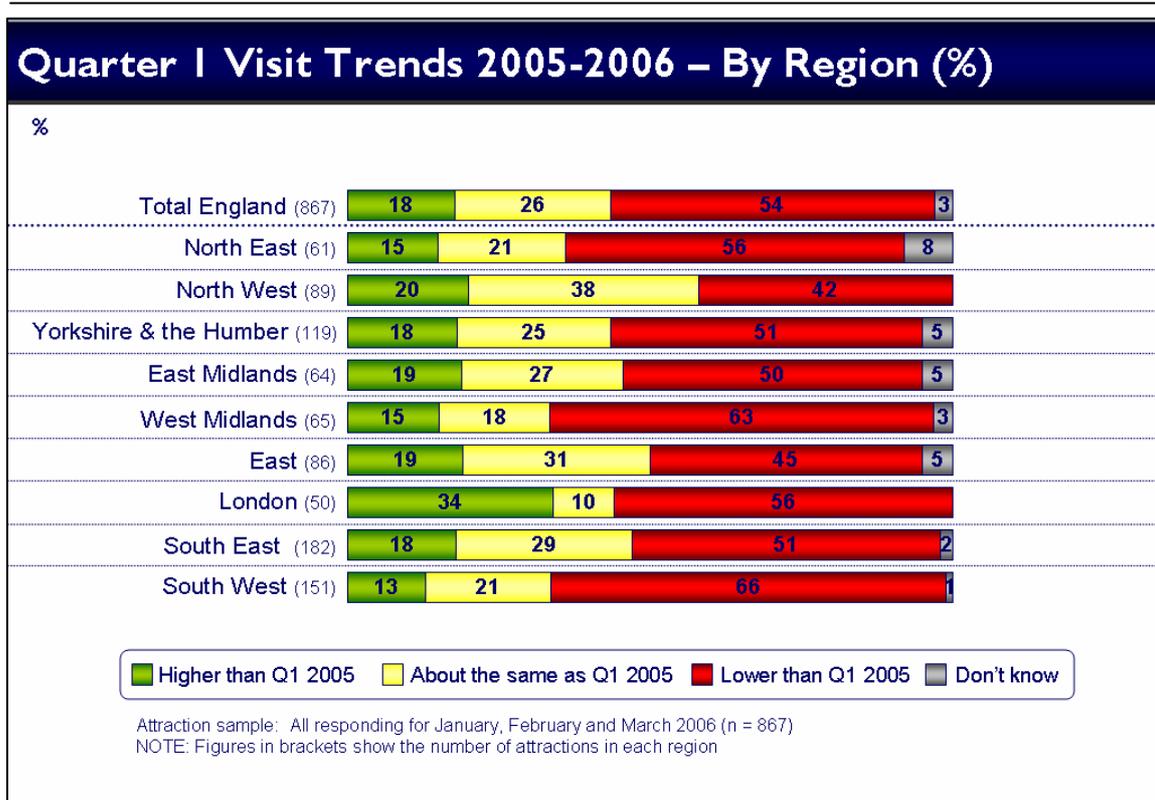
Historic houses and castles, which represent around a third (32%) of all attractions in the sample, were also highly likely to have recorded a year-on-year drop in visitor numbers (69%). Approximately two-third (63%) of Gardens, representing 7% of all attractions, also experienced a fall in admissions between Quarter 1 2005 and Quarter 1 2006. In both instances, this is a reflection of a higher proportion of

properties open to visitors during Quarter 1 2005 to take advantage of the Easter peak visiting season.

Museums/art galleries, second only behind historic houses/castles in terms of their representation in the sample, fared better with only 37% recording a year-on-year fall and 33% experiencing an increase. Museums/art galleries admissions tend to vary less on a seasonal basis and as such are less affected by the timing of Easter.

Workplaces (31% increased admissions) and country parks (26%) also fared relatively well.

### 6.0 Quarter 1 Visit Trends 2005-2006 – By Region (%)



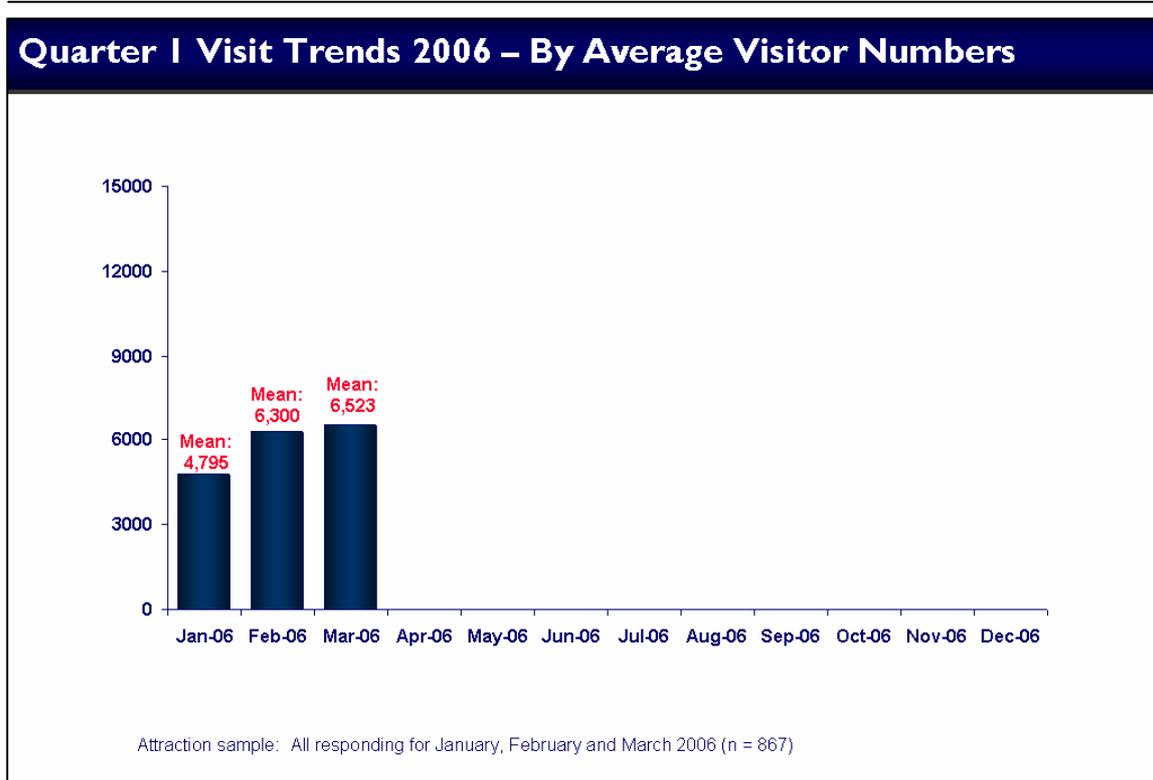
The chart above shows year-on-year changes in visitor numbers by region. It is based on the 867 attractions that provided visitor figures for January, February and March 2006.

In the South West and West Midlands, a higher than average proportion of attractions experienced a year-on-year fall in visitor numbers for the Quarter 1 period.

Approximately two-thirds (66%) of attractions in the South West and West Midlands (63%) recorded lower visitor numbers during Quarter 1 2006 compared to the same period the previous year.

London attractions were most likely to record an increase in visits between 2005 and 2006, with a third (34%) of attractions recording an increase compared with the national average of 18%.

## 7.0 Average Visitor Numbers - by month during Quarter 1



The chart above shows the average visitor numbers by month among responding attractions during the Quarter 1 2006 period. NB: This includes responding attractions that were closed during one or all of these months. February and March were the peak visiting months during the Quarter 1 period recording an average of approximately 1,500 and 1,700 visits more than the month of January respectively.

## 8.0 Average Visitor Numbers during Quarter 1 - by Region

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Region	Sample	Mean number of visitors		
		JANUARY 2006	FEBRUARY 2006	MARCH 2006
North East	(61)	3,083	5,036	3,772
North West	(89)	3,337	5,986	5,001
Yorkshire & the Humber	(119)	3,059	5,342	4,020
East Midlands	(64)	1,135	1,612	2,095
West Midlands	(65)	1,201	2,537	2,745
East	(86)	1,588	2,060	2,134
London	(50)	43,998	48,783	54,849
South East	(182)	2,290	3,067	3,627
South West	(151)	2,679	3,603	3,992
<b>England</b>	<b>(867)</b>	<b>4,795</b>	<b>6,300</b>	<b>6,523</b>

The table above shows the average visitor numbers by region during each month of the Quarter 1 2006 period.

With the exception of the North East, North West and Yorkshire and the Humber, each of the other regions saw average visitor numbers increase from January through to March 2006.

The London region, representing just 6% of the attractions sample, recorded the highest average visitor volumes during the Quarter 1 period, with attractions in the East Midlands, West Midlands and East receiving the lowest levels of average visitors.

## 9.0 Average Visitor Numbers during Quarter 1- by attraction type

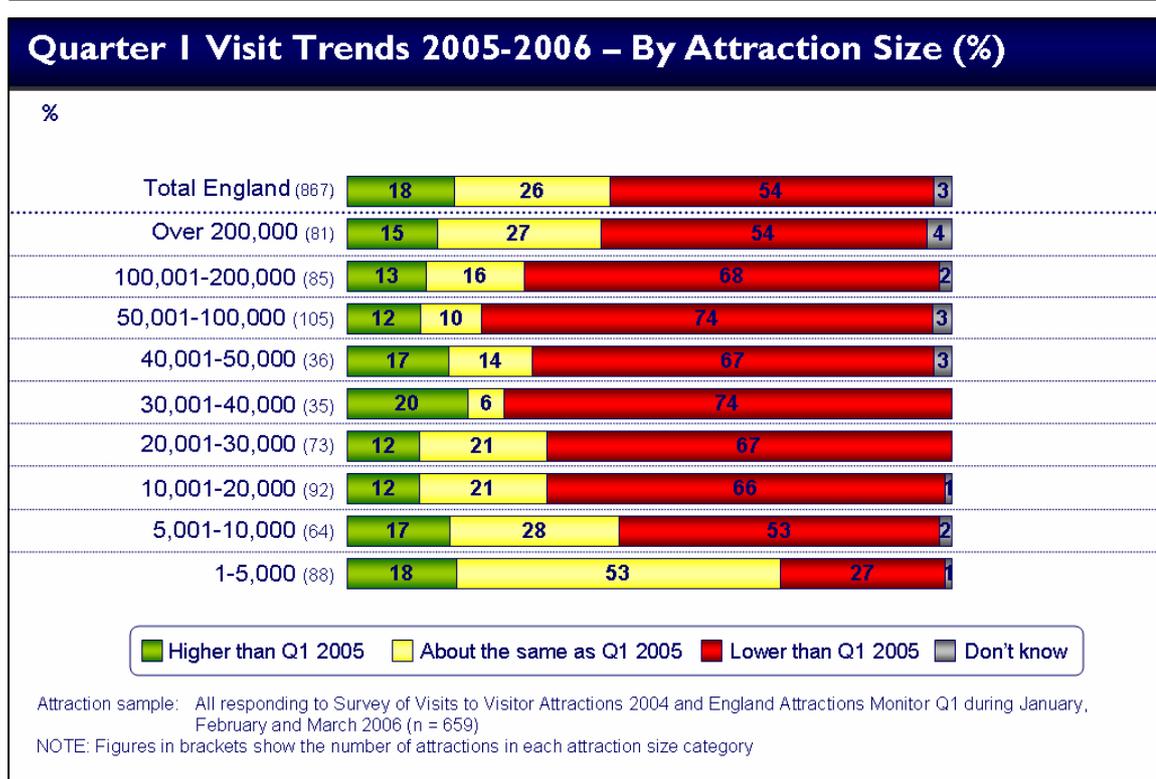
Attraction Category	Sample	Mean number of visitors		
		JANUARY 2006	FEBRUARY 2006	MARCH 2006
Historic houses/castles	(276)	1,249	1,679	2,402
Other historic property	(88)	1,722	2,241	2,756
Place of worship	(14)	9,830	11,833	15,255
Museums/art galleries	(239)	10,717	13,498	13,088
Country park	(27)	9,853	10,824	10,944
Farms	(16)	1,997	3,466	2,826
Gardens	(57)	2,434	2,669	3,361
Leisure/theme parks	(15)	10,553	22,753	24,521
Steam/heritage railway	(17)	845	1,864	1,157
Heritage/visitor centre	(32)	1,603	3,638	3,682
Wildlife attractions/zoo	(38)	4,684	6,488	5,839
Workplaces	(26)	1,944	2,294	2,576
Other	(22)	3,316	5,202	3,701
<b>England</b>	<b>(867)</b>	<b>4,795</b>	<b>6,300</b>	<b>6,523</b>

The table above shows the average visitor numbers by attraction type during each month of the Quarter 1 2006 period.

For the month of January 2006, museums/art galleries recorded the highest average visitor volumes. However, in the months of February 2006 and March 2006, the average number of visitors was approximately 13,000. By comparison, leisure/theme parks experienced much larger variations in average visitor numbers. In January 2006 the average number of visitors to leisure/theme parks was 10,553 (second to museums/galleries), in February this was 22,753 and in March 24,521. Such variations highlight the importance of school holiday periods to this sector (half-term falling within February).

Farms, museums/art galleries, steam/heritage railways, and wildlife attractions/zoos recorded higher average visits in February than in March reflecting the child-focussed nature of many of these attractions.

## 10.0 Quarter 1 Visit Trends 2005-2006 – By Attraction Size (%)<sup>1</sup>

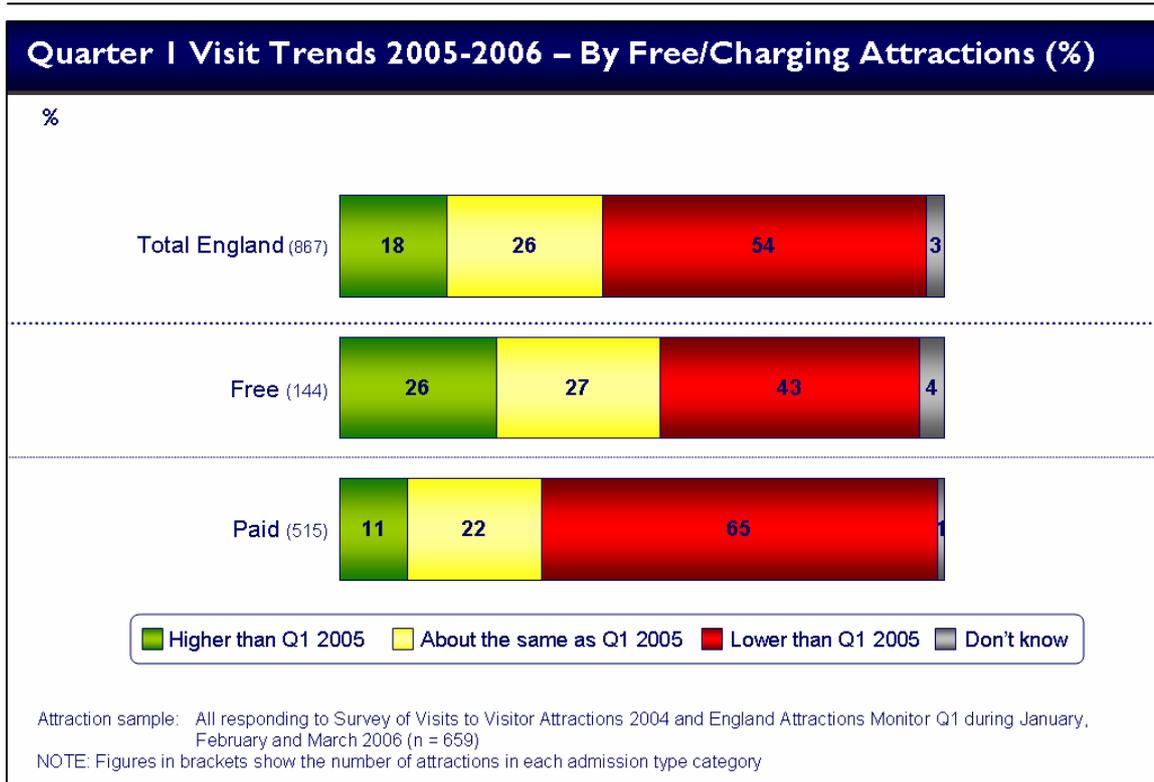


A year-on-year decline in the admissions for the Quarter 1 2006 period was common among all attractions recording 10,000 or more visitors (on an annual basis). Whilst the extent of this decline varied, the overall trend shows that the timing of Easter has had a similar impact irrespective of the size of the attraction.

Smaller attractions recording 5,000 or less visitors on an annual basis have fared better, with 27% of attractions in this category experiencing a year-on-year decline in admissions compared to a national average of 54%.

<sup>1</sup> Attraction size data has been taken from annual visitor figures provided by attractions responding to the Survey of Visits to Visitor Attractions 2004 (also managed by BDRC on behalf of VisitBritain). The chart is based on the 659 attractions who provided visitor figures for January, February and March 2006, and for whom annual admissions data is also available.

## 11.0 Quarter 1 Visit Trends 2005-2006 – By Free/Charging Attractions (%)<sup>2</sup>



Free attractions have fared better than paid attractions. 43% of free attractions recorded a year-on-year decline in admissions during Quarter 1 2006 compared to 65% of paid attractions (and a national average of 54%). Approximately a quarter (26%) of free attractions recorded an increase in visitor numbers between the two Quarter 1 periods (compared to a national average of 18%). The increase in visits to free attractions has been driven by museums/art galleries and country parks (which make-up 64% of all free attractions), who each recorded year-on-year increases in visitor numbers (33% and 26% respectively).

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If you have comments or suggestions on the format of future reports please contact Jonathan Gingold at VisitBritain (020 8563 3317; [Jonathan.Gingold@visitbritain.org](mailto:Jonathan.Gingold@visitbritain.org))

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