

ENGLAND ATTRACTIONS MONITOR

QUARTER 2 REPORT – APRIL TO JUNE 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.

The first quarterly period of the panel (covering January to March 2006) proved very successful, with well over **800 attractions** signing up.

3.0 Summary of findings for Quarter 2 (April to June 2006)

This is a summary report of the findings for the Quarter 2 (April to June 2006) period.

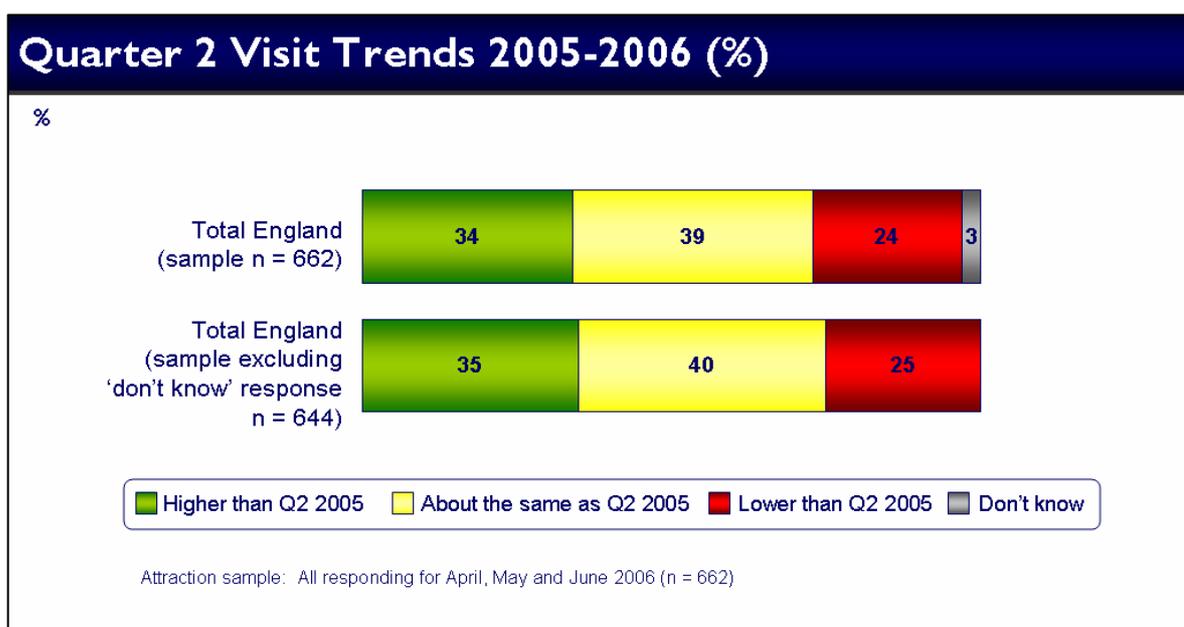
The Easter 2006 holiday period fell during Quarter 2 (April to June 2006). However, the Easter 2005 holiday period occurred during Quarter 1 (January to March 2005). Therefore, a year-on-year increase in admissions for the Quarter 2 period was common, reflecting the timing of Easter 2006 and the higher footfalls recorded during this holiday period.

However, the data also shows that the impact of Easter 2006 falling in the Quarter 2 period has not been as marked as one would anticipate. During Quarter 2 2006, 39% of attractions recorded visitor numbers on par with the same period

the previous year, despite Easter falling in this quarter. Higher admissions are generally recorded during these months, which means the impact of Easter is less marked than it would be during periods with lower visitor volumes. Indeed, during Quarter 1 2006 (January to March), 54% of attractions recorded a year-on-year fall in visitors, due primarily to the Easter period falling during Quarter 1 2005, but outside Quarter 1 during 2006.

A total of 662 attractions took part in the England Attractions Monitor in Quarter 2 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.

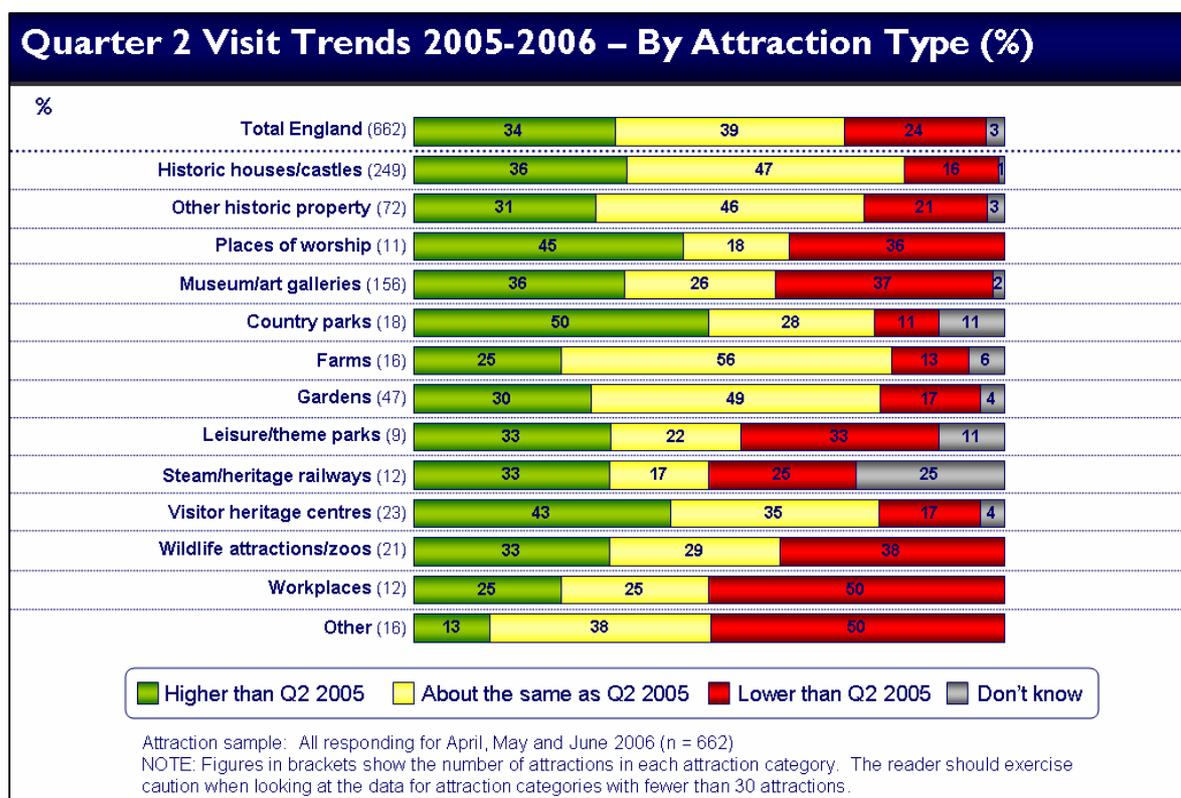
4.0 Quarter 2 Visit Trends 2005-2006 (%)



Approximately a third (34%) of those attractions who provided visitor numbers for April, May and June 2006 recorded higher volumes of visitors during Quarter 2 2006 compared to Quarter 2 2005. This year-on-year increase is due primarily to the Easter period falling during Quarter 2 in 2006, but in Quarter 1 during 2005.

39% of attractions recorded visitor numbers on par with the same period the previous year. This shows attractions who normally record high visitor volumes during April, May and June may be less affected by the timing of Easter.

5.0 Quarter 2 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 662 attractions that provided visitor figures for April, May and June 2006.

With the exception of Farms (25%), Workplaces (25%) and Others (13%), approximately a third of attractions in each of the other attraction categories recorded a year-on-year increase on visitor numbers between the two Quarter 2 periods.

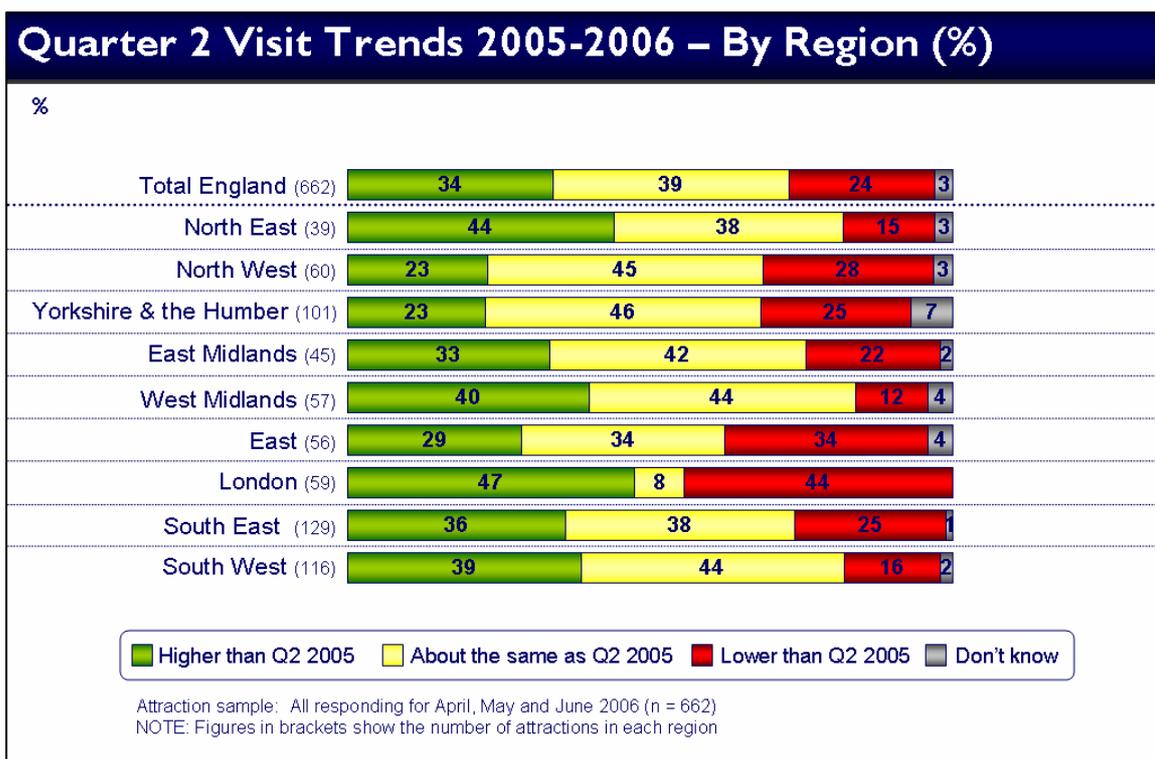
Historic houses/castles (47%), Other historic properties (47%) and Gardens (49%) were most likely to have recorded visitor volumes on par with the same period the previous year.

Museums and art galleries, which represent around a quarter (24%) of all attractions in the sample, were as likely to have recorded a year-on-year drop in visitor numbers (37%) as they were to have recorded an increase (36%). One potential explanation for this could be that some visitors are encouraged to visit by special events and exhibitions that may be planned for this period, whilst others may be deterred

because of the higher number of visitors encouraged to visit during the holiday period.

Workplaces (50%) and Others (50%) were most likely to have recorded a year-on-year fall in admissions between the two Quarter 2 periods.

6.0 Quarter 2 Visit Trends 2005-2006 – By Region (%)



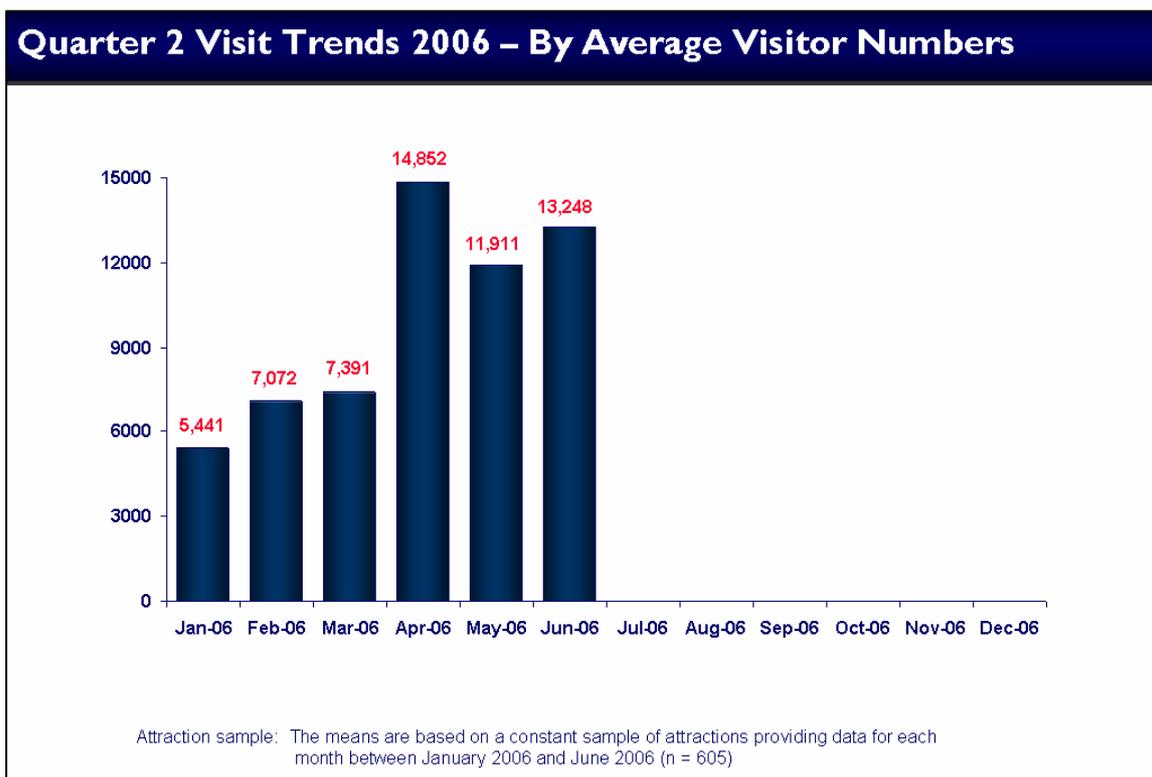
The chart above shows year-on-year changes in visitor numbers by region. It is based on the 662 attractions that provided visitor figures for April, May and June 2006.

In the North East (44%), West Midlands (40%), South West (39%) and South East (36%) a higher than average proportion of attractions experienced a year-on-year increase in visitor numbers between Quarter 2 2005 and Quarter 2 2006.

The East (34%), North West (28%) and Yorkshire & the Humber (25%) recorded year-on-year falls in visitors numbers between the two Quarter 2 periods higher than the national average of 24%.

The performance of attractions in London between the two Quarter 2 periods was polarised. Nearly half (47%) of attractions recorded an increase in visits between 2005 and 2006, compared with the national average of 34%. However, 44% recorded a year-on-year fall, compared to the national average of 24%.

7.0 Average Visitor Numbers - by month during Quarter 2



The chart above shows the average visitor numbers by month among a constant sample of responding attractions during each month within both the Quarter 1 and Quarter 2 2006 period. NB: This includes responding attractions that were closed during one or all of these months.

April is the peak visiting month to date, recording an average of 14,852 visitors, more than double the number of visitors recorded during the busiest month of the Quarter 1 period (March 2006, during which an average of 7,391 visitors were recorded), reflecting the peak visiting Easter holiday period.

8.0 Average Visitor Numbers during Quarter 2 - by Region

Region	Sample	Mean number of visitors		
		APRIL 2006	MAY 2006	JUNE 2006
North East	(38)	4,810	4,111	6,397
North West	(55)	27,228	20,331	23,473
Yorkshire & the Humber	(84)	5,323	4,168	4,931
East Midlands	(42)	5,600	4,111	4,736
West Midlands	(49)	5,592	4,454	5,304
East	(55)	4,808	3,760	4,800
London	(49)	75,647	61,549	60,420
South East	(125)	9,601	8,220	9,492
South West	(108)	10,902	8,707	11,084
England	(605)	14,852	11,911	13,248

The table above shows the average visitor numbers by region during each month of the Quarter 2 2006 period.

With the exception of the North East, all other regions recorded higher average visitor numbers during April 2006, than May and June, reflecting the higher footfalls recorded during the peak visiting Easter holiday period.

The London region, representing just 8% of the attractions sample, recorded the highest average visitor volumes during the Quarter 2 period, with attractions in the East receiving the lowest levels of average visitors.

9.0 Average Visitor Numbers during Quarter 2 - by attraction type

Attraction Category	Sample	Mean number of visitors		
		APRIL 2006	MAY 2006	JUNE 2006
Historic houses/castles	242	8,516	6,380	8,004
Other historic property	66	5,343	4,102	5,854
Place of worship	10	15,010	17,712	17,047
Museums/art galleries	130	22,459	19,412	18,659
Country park	15	18,198	16,750	19,785
Farms	15	14,818	7,653	8,898
Gardens	42	15,124	13,210	15,064
Leisure/theme parks	8	84,748	50,925	68,566
Steam/heritage railway	12	4,364	4,905	4,891
Heritage/visitor centre	22	5,187	3,356	5,175
Wildlife attractions/zoo	18	18,662	15,870	18,270
Workplaces	12	5,673	5,123	5,972
Other	13	86,387	67,889	70,098
England	(605)	14,852	11,911	13,248

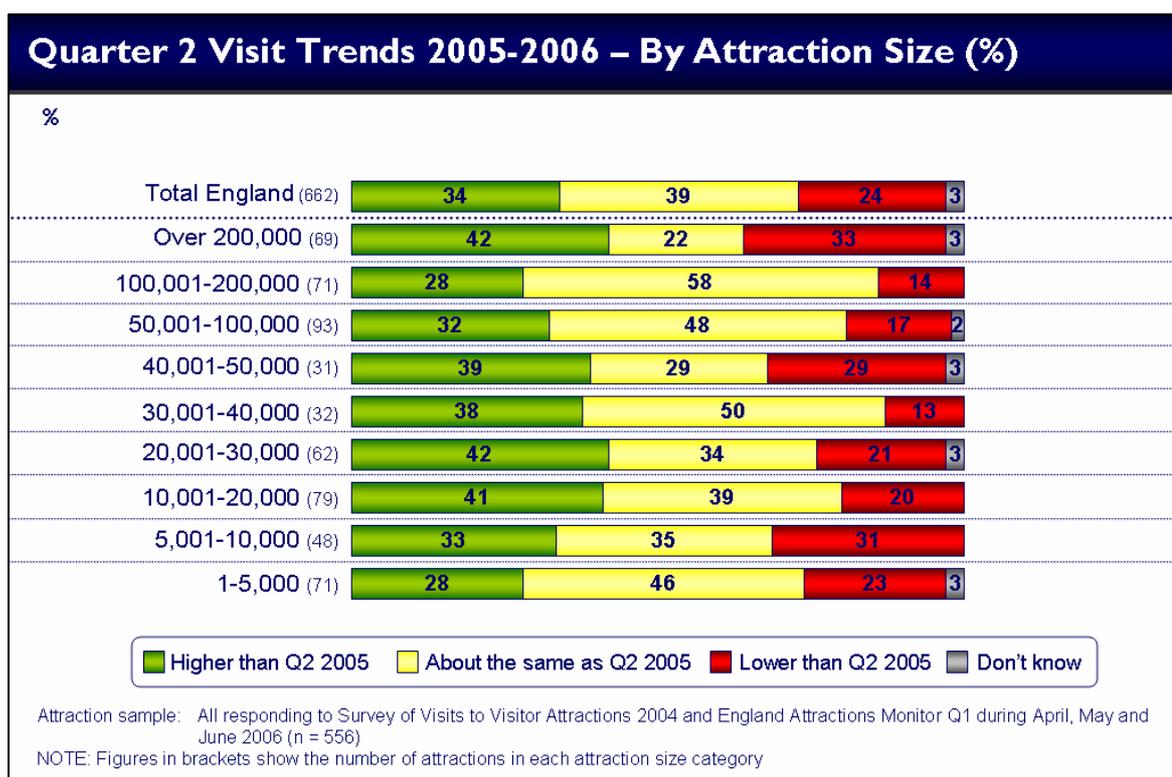
The table above shows the average visitor numbers by attraction type during each month of the Quarter 2 2006 period.

The highest average visitor volumes for April, May and June 2006 was recorded by Leisure and Theme Parks. April proved the busiest month in the quarter for this sector, with an average of 84,748 visitors recorded, highlighting the importance of the school holiday period to this sector.

In April 2006, Museums and Galleries were second to Leisure and Theme Parks in terms of average visitor volumes. April and May 2006 were the busiest months for this sector, recording averages of 22,459 and 19,412 visitors respectively (compared to 18,659 in June).

Country parks recorded higher average visits in June than in April and May. An average of 19,785 visits was recorded to Country Parks during June compared to 18,198 in April and 16,750 in May.

10.0 Quarter 2 Visit Trends 2005-2006 – By Attraction Size (%)¹

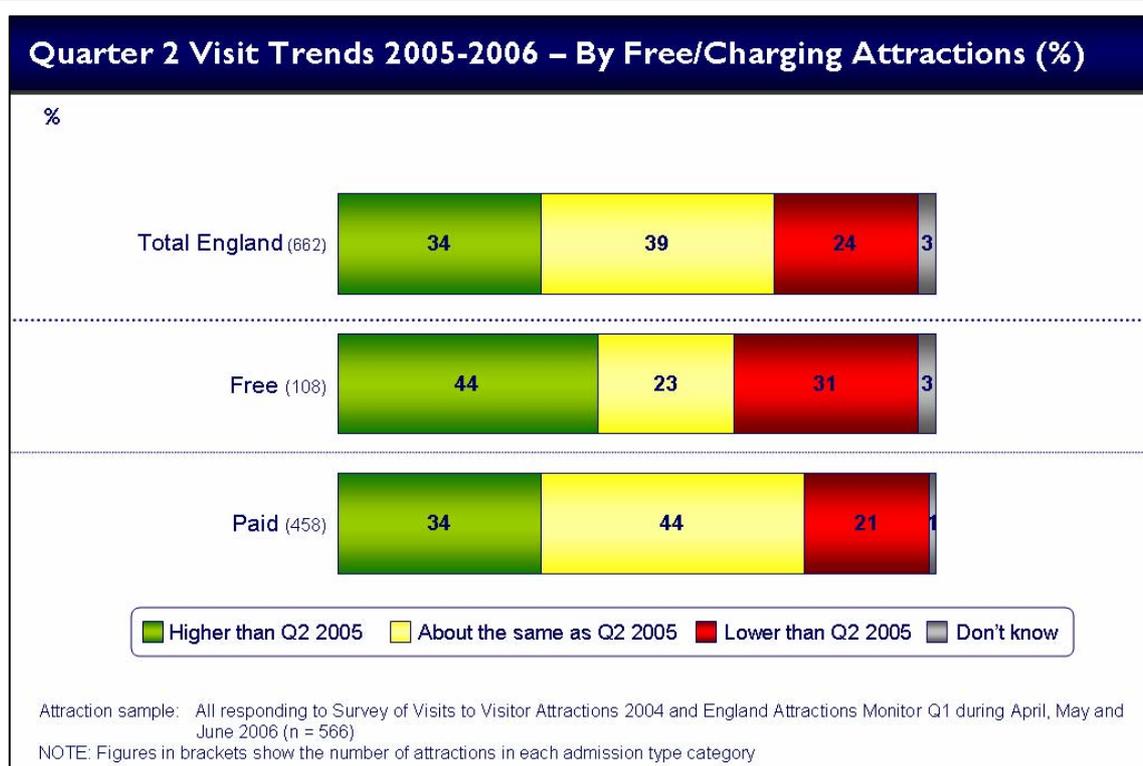


The performance of attractions recording 200,000 visitors or more (on an annual basis) was polarised. Approximately two-fifths (42%) of attractions in this category recorded an increase in visitor numbers between the two Quarter 2 periods, compared to a national average of 34%. However, a third (33%) also recorded a year-on-year fall, higher than the average of 24%.

Attractions recording 10,001-20,000 and 20,001-30,000 visitors (on an annual basis) fared better than the national average, with 41% and 42% (respectively) of attractions in this category experiencing a year-on-year increase in admissions compared to a national average of 34%.

¹ 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 556 attractions who provided visitor figures for April, May and June 2006, and for whom annual admissions data is also available.

11.0 Quarter 2 Visit Trends 2005-2006 – By Free/Charging Attractions (%)²



44% of free attractions recorded a year-on-year increase in admissions during Quarter 2 2006 compared to 34% of paid attractions (and a national average of 34%).

Approximately a third (31%) of free attractions recorded a fall in visitor numbers between the two Quarter 2 periods, compared to 21% of paid attractions and a national average of 24%.

The trends in visits to free attractions has been primarily driven by museums/art galleries (which make-up 24% of all free attractions), who recorded both higher than average year-on-year increases (36%) and falls (37%) in visitor numbers.

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)

² Admission type data has been 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 566 attractions who provided visitor figures for April, May and June 2006, and for whom admission type data is also available.