ENGLAND ATTRACTIONS MONITOR

QUARTER 3 REPORT – JULY TO SEPTEMBER 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 two quarterly periods of the panel (covering January to June 2006) proved very successful, with well over **800 attractions** providing data to date.

A total of 555 attractions took part in the England Attractions Monitor in Quarter 3 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 attractions join, whilst others drop out. However, where applicable, comparisons will always be made among constant samples.

3.0 Summary of findings for Quarter 3 (July to September 2006)

This is a summary report of the findings for the Quarter 3 (July to September2006) period.

By way of context, the weather during Quarter 3 differed significantly month-by-month. July was an exceptionally warm and sunny month with record high mean temperatures in many regions. August was a more average month in terms of temperature, sunshine and rainfall, with some areas experiencing rainfall significantly above average. September saw a return to warm and sunny conditions compared to averages for the month.

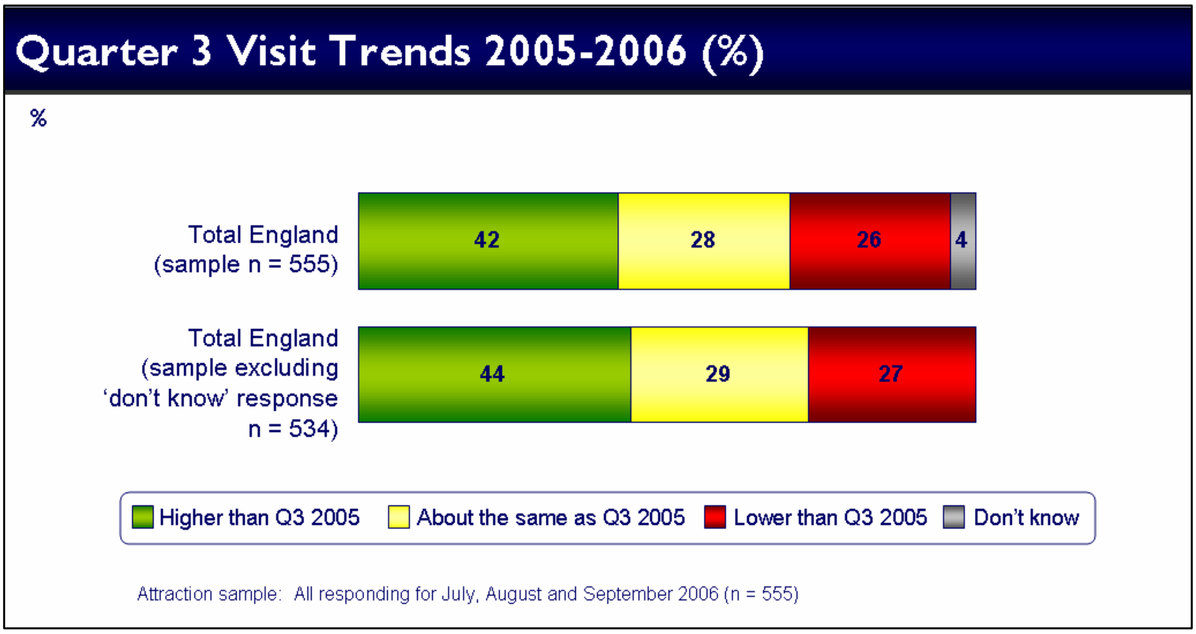
Results from Quarter 3 were encouraging overall, with 42% of attractions claiming that visitor volumes had increased on the equivalent quarter of 2005. Nevertheless, there was still a significant minority (approximately a quarter) of attractions that recorded a decline.

Museums and art galleries drove the increase in visitor volumes, with over half (54%) reporting visitor volume increases for this period.

London recorded a very strong performance during the period with 82% of attractions reporting an increase in visitor volumes. This represents a good recovery following the London bombings of 2005.

The past two quarters have provided some evidence that the large national attractions and the smaller, local attractions are benefiting from the increasing traffic congestion on the roads at the expense of the medium-sized regional attractions.

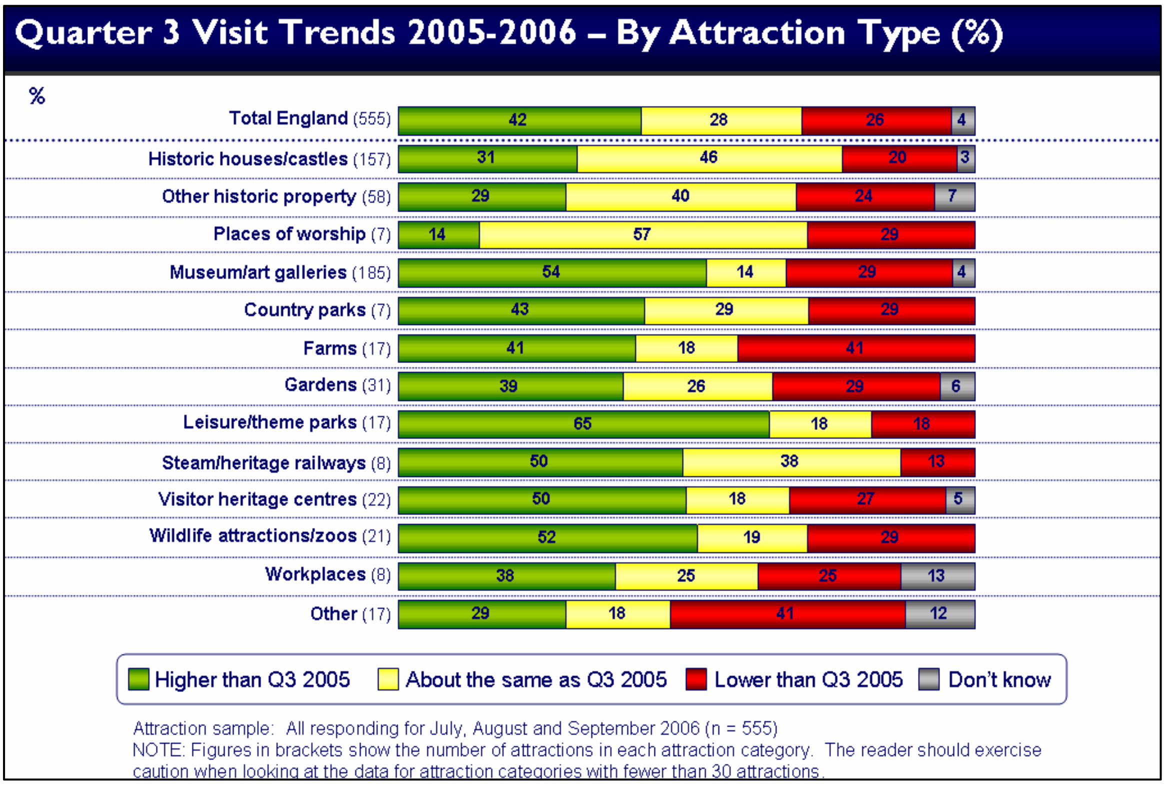
4.0 Quarter 3 Visit Trends 2005-2006 (%)



Q3 (July, August and September) appears to have been a positive period for the attractions industry as a whole, with 42% of attractions claiming that visitor volumes were higher than the equivalent period of 2005. This represents an increase on the third (34%) of attractions claiming that Q2 visitor volumes were higher than in 2005.

However, there remains a significant minority of attractions whose visitor numbers are declining. In Q3, a quarter (26%) of attractions claimed that their visitor volumes were lower than the equivalent period of 2005 – a similar proportion to that observed for Q2 (24%).

5.0 Quarter 3 Visit Trends 2005-2006 – By Attraction Type (%)



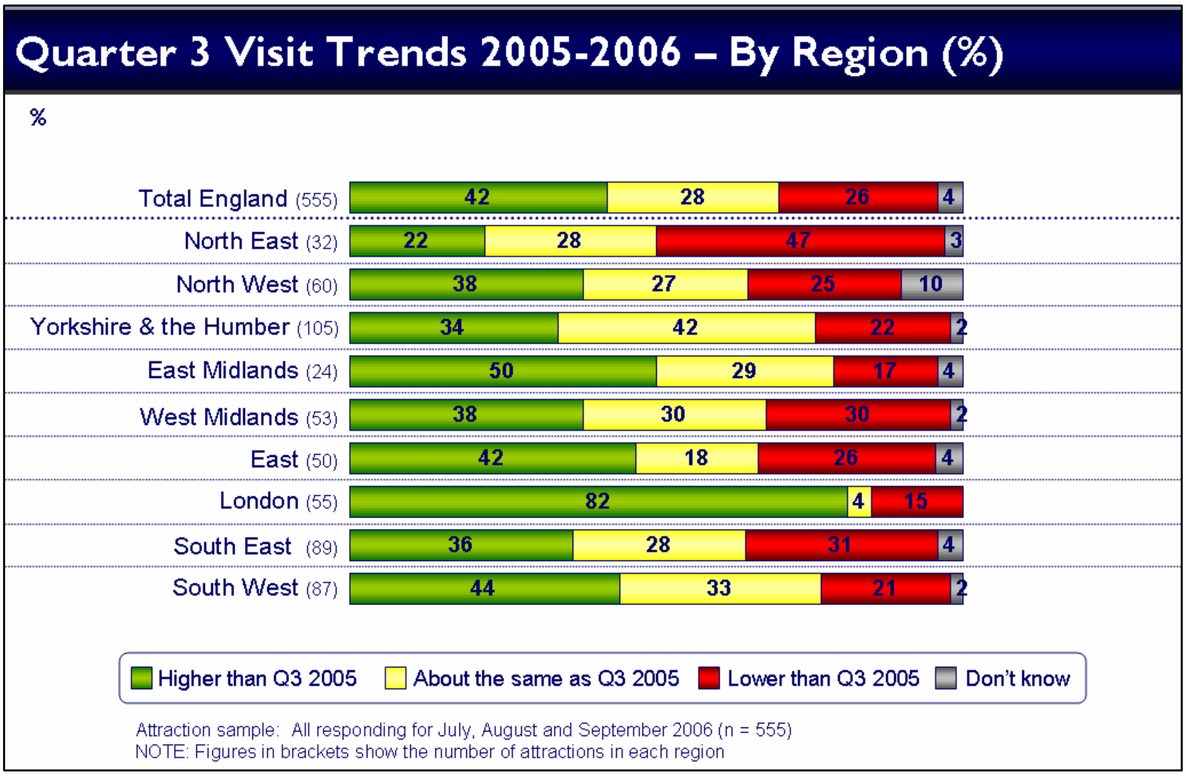
The chart above shows year-on-year changes in visitor numbers by attraction type. It is based on the 555 attractions that provided visitor figures for July, August and September 2006.

Museums and art galleries, which represent a third (33%) of all attractions in the sample, performed strongly in Q3. Over half (54%) of museums and art galleries claimed that visitor volumes had increased in Q3 2006 compared with the equivalent period in 2005. This follows a less positive Q2 period in which visitor volumes were as likely to have recorded a year-on-year drop as they were to have recorded an increase (36%).

Other sectors which were significantly more likely to report year-on-year increases in visitor volumes than decreases include leisure/theme parks (65% increase, 18% decrease), wildlife attractions (52% increase, 29% decrease), visitor/heritage centres (50% increase, 27% decrease) and historic houses/castles (31% increase, 20% decrease).

Gardens also performed positively with 39% claiming visitor volumes had increased (reflecting the generally warm and sunny nature of the period), although 29% reported a decrease.

6.0 Quarter 3 Visit Trends 2005-2006 – By Region (%)



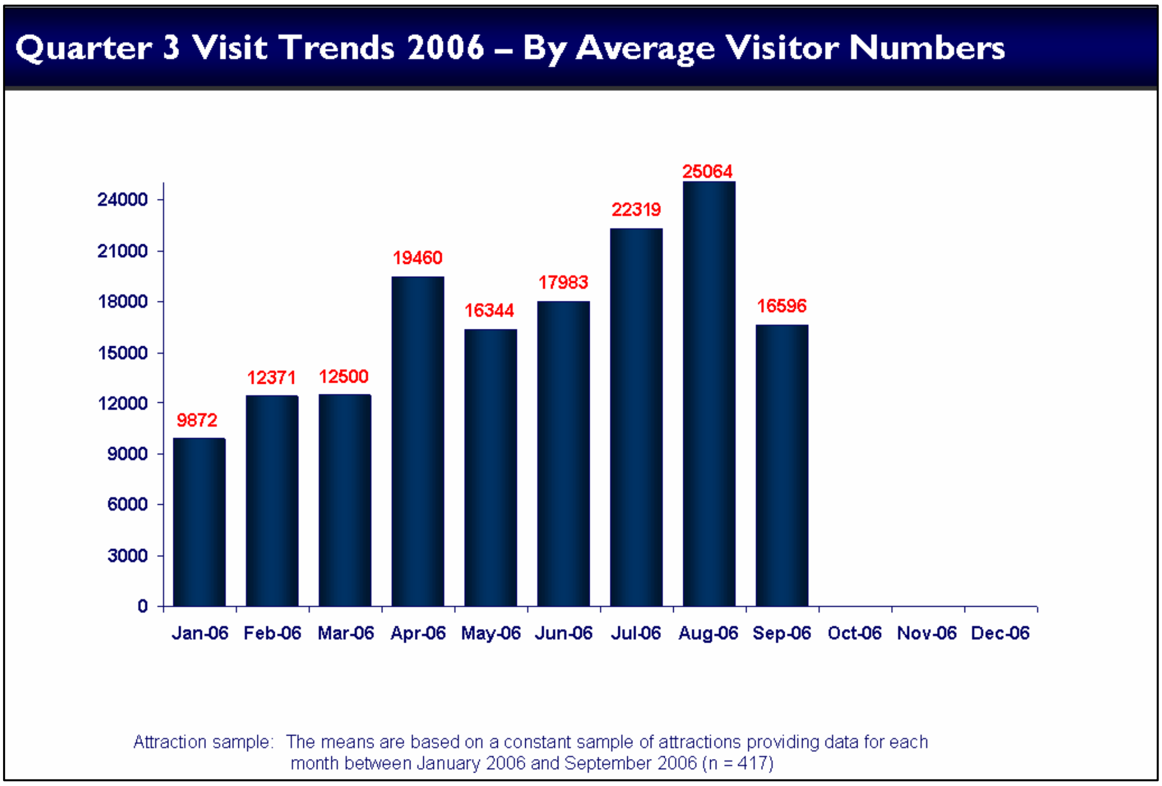
The chart above shows year-on-year changes in visitor numbers by region. It is based on the 555 attractions that provided visitor figures for July, August and September 2006.

The performance of attractions in London during the Quarter 3 period was highly positive. 82% of all attractions reported a year-on-year increase in visitor volumes compared with only 15% reporting a decline. This represents a strong recovery from the equivalent period the previous year which included July 2005 London bombings.

Other regions to report strong performances in 2006 relative to 2005 (where the proportion of attractions reporting increase in visitor volumes was higher than the national average of 42%) were the East Midlands (50%) and South West (44%). Both of these regions also reported strong increases in Quarter 2.

Regions recording year-on-year falls in visitor volumes between the two Quarter 2 periods higher than the national average of 24% of attractions were the North East (47%), South East (31%) and West Midlands (30%). This represents a change in fortunes within each of these regions which all performed positively in the Quarter 2 period.

7.0 Average Visitor Numbers - by month during Quarter 3



The chart above shows the average visitor numbers by month among a constant sample of responding attractions during each month within each of the Quarter 1, Quarter 2 and Quarter 3 2006 periods. NB: This includes responding attractions that were closed during one or all of these months.

August is the peak visiting month to date, recording an average of 25,064 visitors, closely followed by July with an average of 22,319 visitors. Reflecting the falling of Easter within April in 2006, visitor volumes in this month were also high and exceeded average visitor volumes for each of May, June and September.

8.0 Average Visitor Numbers during Quarter 3 - by Region

Region	**Sample**		**Mean number of visitors**	
		JULY 2006	**AUGUST 2006**	**SEPTEMBER 2006**
North East	(28)	5,963	8,411	5,485
North West	(45)	23,020	19,952	17,448
Yorkshire & the Humber	(57)	20,548	26,498	15,412
East Midlands	(19)	2,324	2,839	2,160
West Midlands	(30)	5,321	5,905	4,996
East	(40)	5,067	5,408	5,090
London	(45)	89,178	90,294	59,617
South East	(77)	19,611	23,468	16,197
South West	(76)	13,201	19,271	10,249
England	**(417)**	**22,319**	**25,064**	**16,596**

The table above shows the average visitor numbers by region during each month of the Quarter 3 2006 period (based on attractions reporting numbers for each of the Quarter 1, Quarter 2 and Quarter 3 periods).

With the exception of the North West, all other regions recorded higher average visitor numbers during August 2006, than in July or September.

9.0 Average Visitor Numbers during Quarter 3 - by attraction type

Attraction Category	**Sample**		**Mean number of visitors**	
		JULY 2006	**AUGUST 2006**	**SEPTEMBER 2006**
Historic houses/castles	(134)	10,516	11,092	7,989
Other historic property	(46)	7,603	8,621	6,657
Place of worship	(6)	45,498	42,648	30,564
Museums/art galleries	(124)	25,612	29,419	19,270
Country parks	(6)	43,509	73,721	28,087
Farms	(11)	23,442	23,750	9,863
Gardens	(24)	14,574	14,356	10,558
Leisure/theme parks	(11)	184,140	202,170	151,178
Steam/heritage railway	(5)	7,259	8,751	7,475
Heritage/visitor centre	(15)	4,231	4,138	2,418
Wildlife attractions/zoo	(18)	19,279	30,113	13,164
Workplaces	(6)	13,591	20,026	11,889
Other	(11)	61,493	56,814	35,974
England	**(417)**	**22,319**	**25,064**	**16,596**

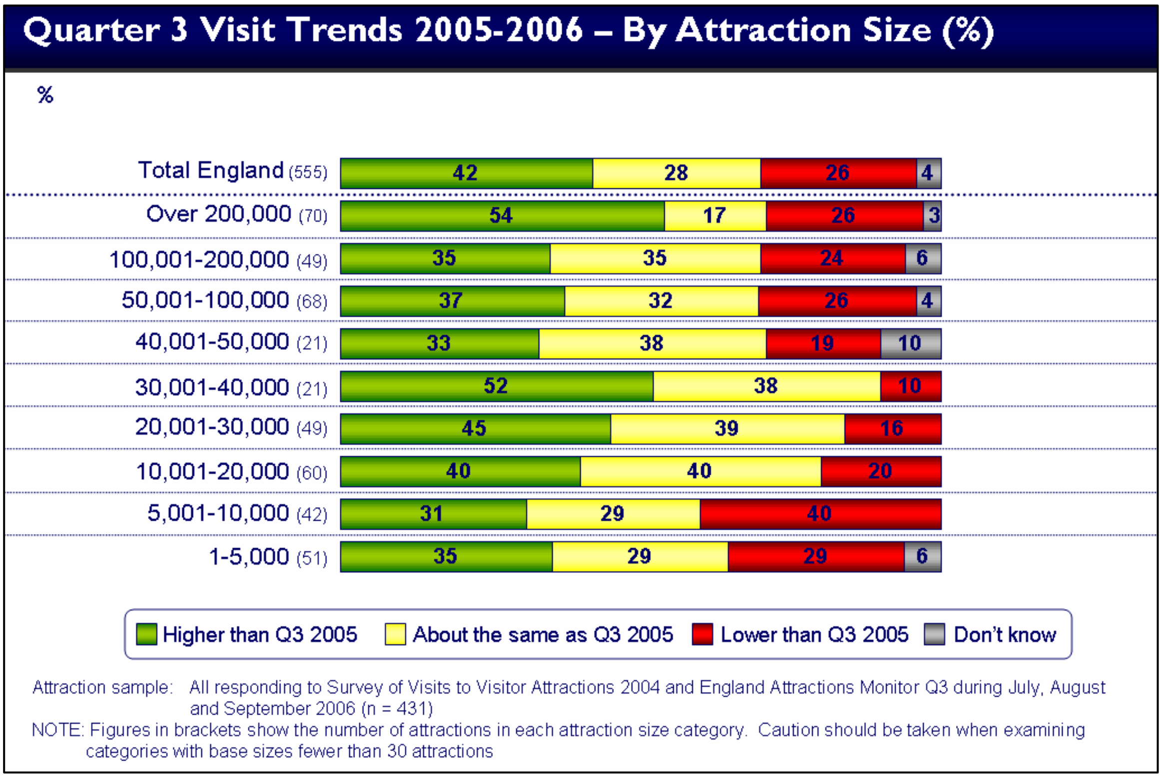
The table above shows the average visitor numbers by attraction type during each month of the Quarter 3 2006 period (based on attractions reporting numbers for each of the Quarter 1, Quarter 2 and Quarter 3 periods).

For the majority of attraction categories, August was the popular month of the quarter. In particular, country parks, wildlife attractions/zoos and workplaces each reported significantly higher average visitor volumes in August than in either July or September.

Conversely, there were a small number of attraction types that recorded slightly lower visitor volumes in August than in July. Places of worship, gardens and heritage/visitor centres all displayed this pattern, reflecting their lower reliance on the school holidays as a source of visitors. In contrast, country parks, wildlife attractions, leisure/theme parks and farms reported the highest drop-off in visitors in September relative to August, illustrating their reliance on this period.

The highest average visitor volumes for July, August and September 2006 was once again recorded by leisure and theme parks.

10.0 Quarter 3 Visit Trends 2005-2006 – By Attraction Size (%)[1]

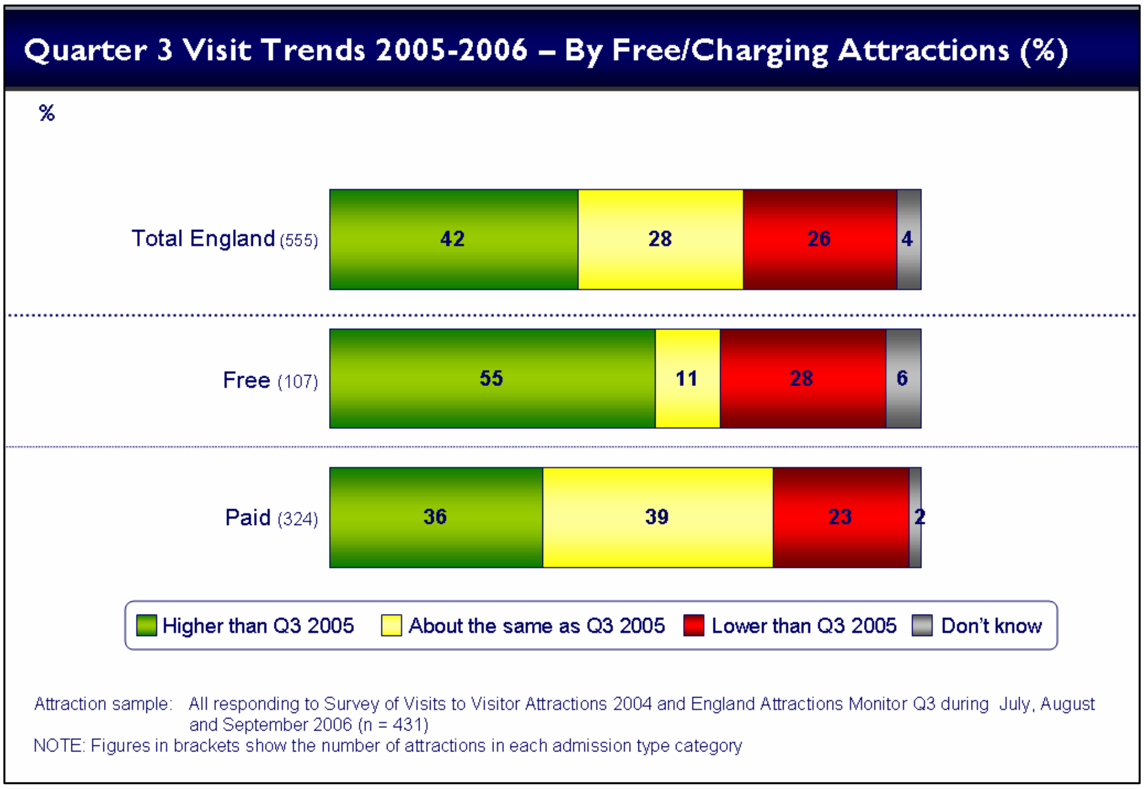


The performance of attractions recording 200,000 visitors or more (on an annual basis) was positive in Quarter 3 2006. Over half (54%) of attractions in this category recorded an increase in visitor numbers between the two Quarter 3 periods, compared to a national average of 42%. However, a quarter (26%) recorded a year-on-year fall, the same as the average of 26% among attractions as a whole. This represents a positive progression from Quarter 2 when the proportion reporting a decline was higher than average.

As in Quarter 2, smaller attractions recording 10,001-40,000 visitors (on an annual basis) fared better than the national average, with proportions of attractions reporting increases in visitor volumes far outweighing proportions reporting declines. There is a growing opinion within the industry that these smaller, often more local attractions, are prospering at the expense of the larger regional attractions as travelling around the increasingly congested road network becomes more time consuming.

[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 431 attractions who provided visitor figures for July, August and September 2006, and for whom annual admissions data is also available.

11.0 Quarter 3 Visit Trends 2005-2006 – By Free/Charging Attractions (%)[2]



The pattern observed in Quarter 2 for free attractions to be performing more positively year-on-year than paid attractions, has continued in Quarter 3 2006. 55% of free attractions recorded a year-on-year increase in admissions during Quarter 3 2006 compared to 36% of paid attractions (and a national average of 42%).

However, free attractions also continue to be slightly more likely to record a fall in visitor numbers between the two Quarter 3 periods, with 28% reporting a fall compared to 23% of paid attractions and a national average of 26%.

The positive trend in visits to free attractions has again been primarily driven by museums/art galleries (which make-up two-thirds of free attractions), which recorded higher than average year-on-year increases (54%) in visitor volumes.

If you have comments or suggestions on the format of future reports please contact Angus James at VisitBritain (020 8563 3320; Angus.James@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 431 attractions who provided visitor figures for July, September and August 2006, and for whom admission type data is also available.