ENGLAND ATTRACTIONS MONITOR

QUARTER 4 REPORT – OCTOBER TO DECEMBER 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 three quarterly periods of the panel (covering January to September 2006) proved very successful, with well over **800 attractions** providing data to date.

A total of 820 attractions took part in the England Attractions Monitor in Quarter 4 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 4 (October to December 2006)

This is a summary report of the findings for the Quarter 4 (October to December 2006) period.

By way of context, the weather during Quarter 4 was generally significantly warmer than average. Indeed, 2006 was confirmed as recording the warmest autumn since 1914. However this period, particularly October and November, was also significantly wetter than average.

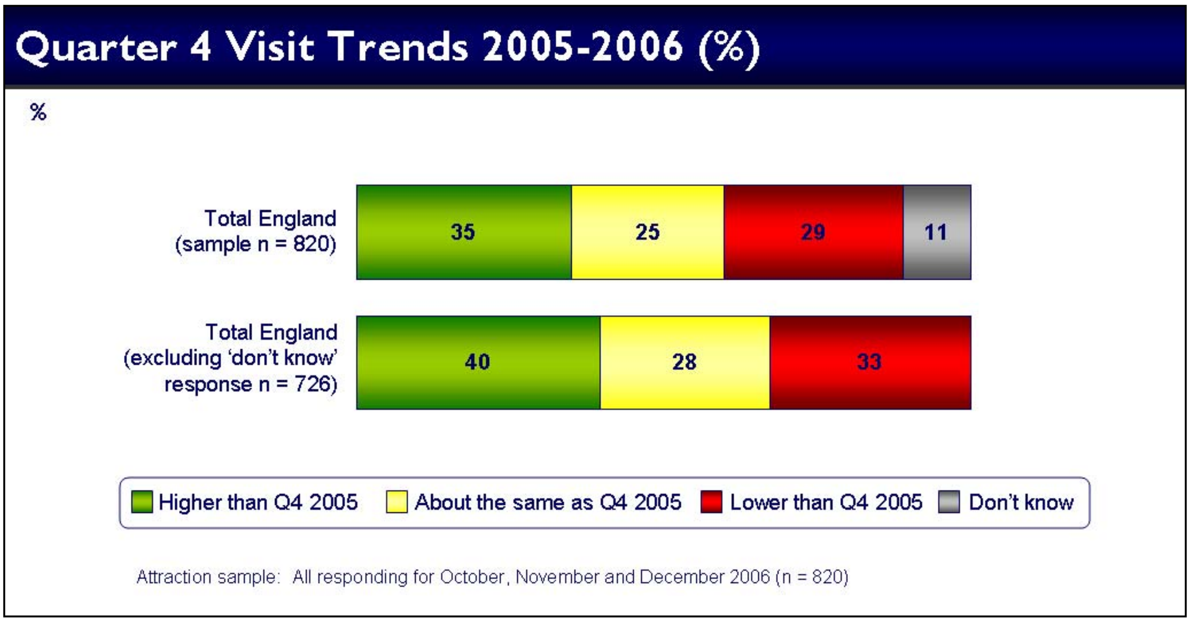
Results from Quarter 4 were again encouraging overall, with 35% of attractions claiming that visitor volumes had increased on the equivalent quarter of 2005 (compared with 42% in Quarter 3). Nevertheless, there remained over a quarter of attractions that recorded a decline, similar to the proportion recorded in each of the previous two quarters.

Museums and art galleries continued to perform positively, with 40% reporting visitor volume increases for this period. Reflecting the warm weather, outdoor attractions such as wildlife attractions, farms and gardens also performed positively in Quarter 4.

London again recorded a strong performance during the period with 55% of attractions reporting an increase in visitor volumes. This represents a continued recovery from the equivalent period the previous year which included the aftermath of the 2005 London bombings.

Each of the past three quarters have provided 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.

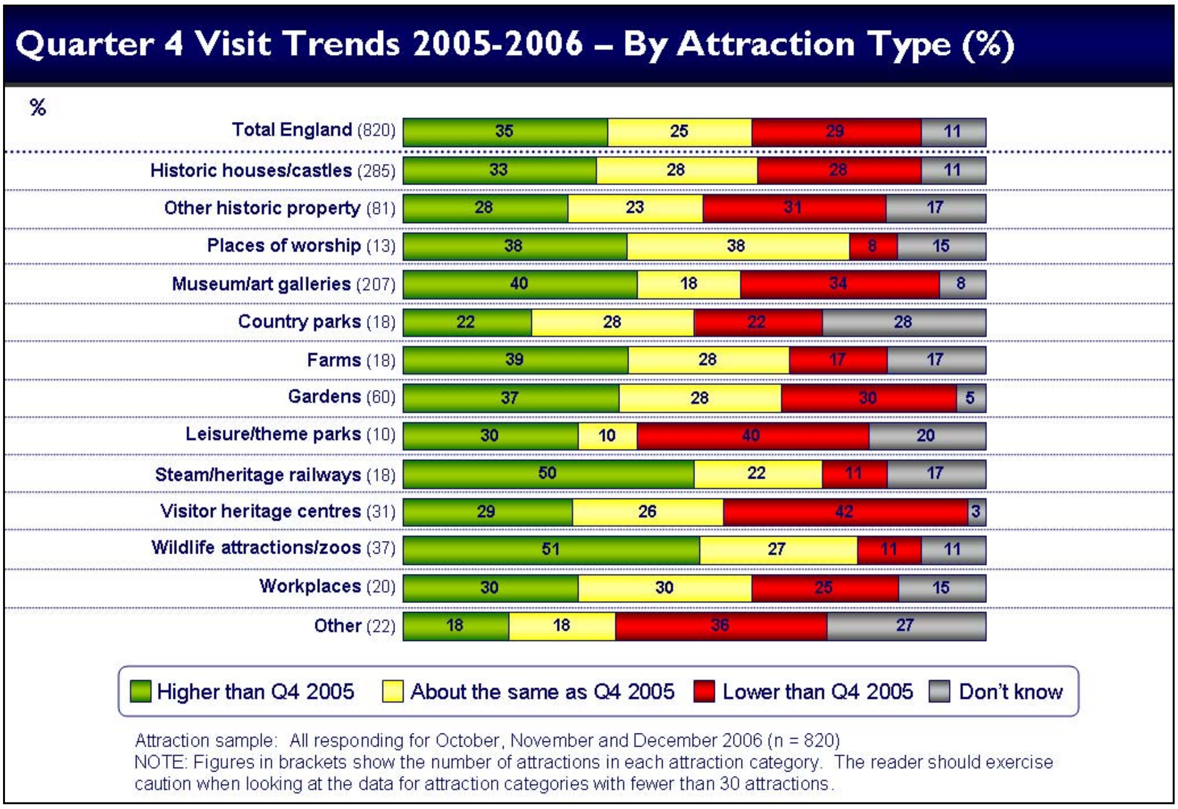
4.0 Quarter 4 Visit Trends 2005-2006 (%)



Q4 (October, November and December) once again appears to have been a positive period for the attractions industry as a whole, with 35% of attractions claiming that visitor volumes were higher than the equivalent period of 2005. This is a similar proportion to that recorded in both Q3 (42%) and Q2 (34%) of 2006 and significantly higher than the proportion recorded at Q1 (18%).

However, there remains a significant minority of attractions whose visitor numbers are declining. In Q4, over a quarter (29%) of attractions claimed that their visitor volumes were lower than the equivalent period of 2005 – a similar proportion to that observed for both Q3 (26%) and Q2 (24%), but lower than the proportion recorded in Q1 (54%).

5.0 Quarter 4 Visit Trends 2005-2006 – By Attraction Type (%)



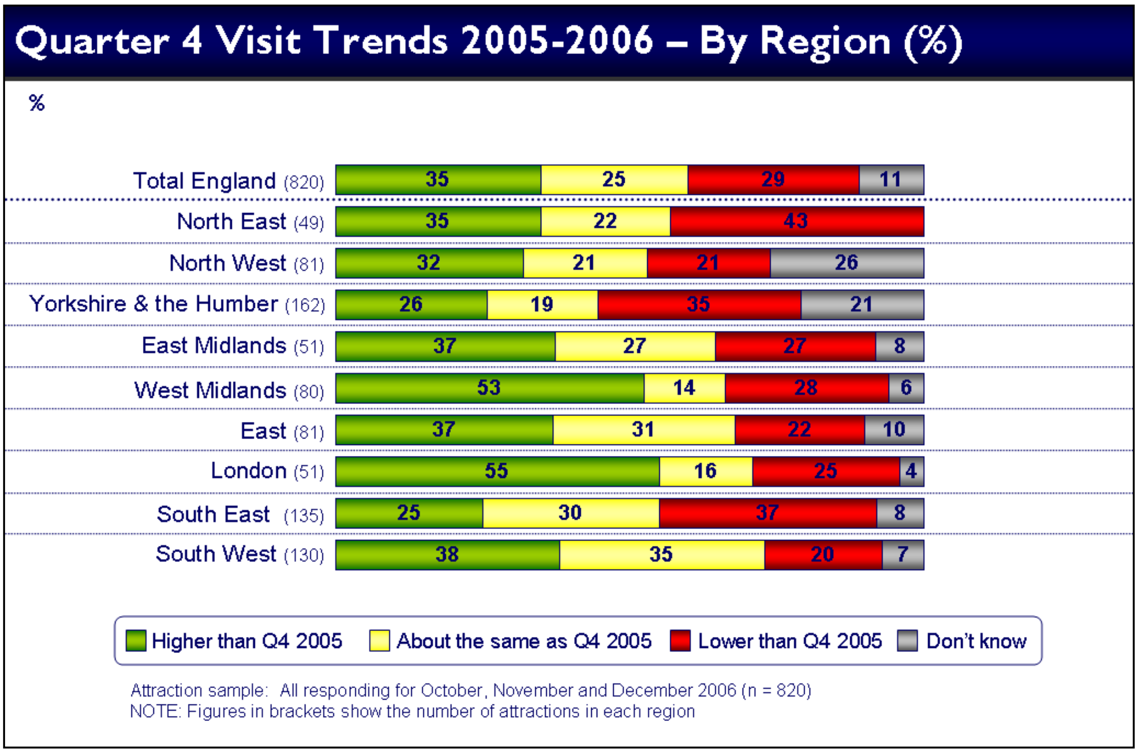
The chart above shows year-on-year changes in visitor numbers by attraction type. It is based on the 820 attractions that provided visitor figures for October, November and December 2006.

Museums and art galleries, which represent a quarter of all attractions in the sample, again performed strongly in Q4. 40% of museums and art galleries claimed that visitor volumes had increased in Q4 2006 compared with the equivalent period in 2005. This follows a positive Q3 period in which 54% of museums and galleries reported an increase in visitor volumes. However, visit trends are somewhat polarised in this sector, with a third of museums and art galleries reporting a decline in visitors in Q4 2006, higher than the average for attractions as a whole.

Other sectors which were significantly more likely to report year-on-year increases in visitor volumes than decreases in Q4 include wildlife attractions (51% increase, 11% decrease) and steam/heritage railways (50% increase, 11% decrease). With the exception of Q2, wildlife attractions have tended to perform better than average throughout the year.

Other outdoor attractions such as farms and gardens also performed more positively than attractions as a whole in Q4, reflecting the generally warm nature of the period.

6.0 Quarter 4 Visit Trends 2005-2006 – By Region (%)



The chart above shows year-on-year changes in visitor numbers by region. It is based on the 820 attractions that provided visitor figures for October, November and December 2006

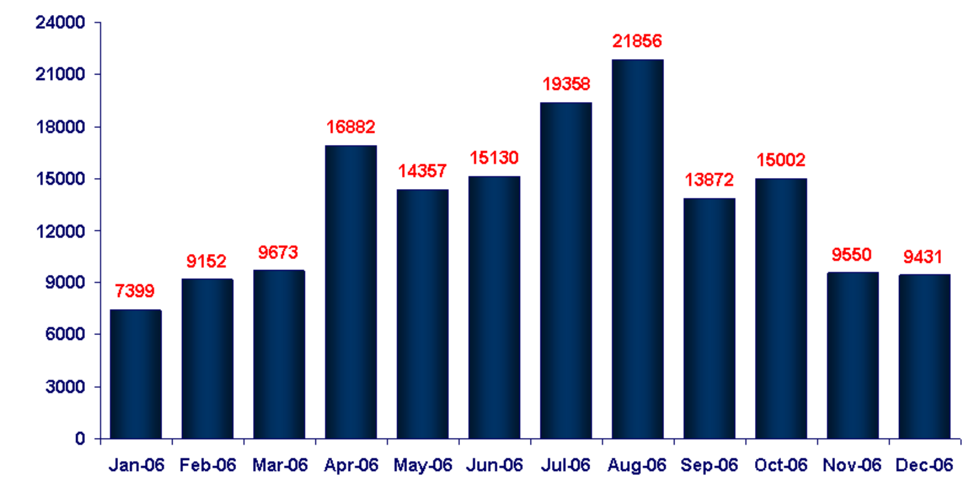
The performance of attractions in London during the Quarter 4 period was again positive. 55% of all attractions reported a year-on-year increase in visitor volumes in Q4 compared with only 25% reporting a decline. Whilst not quite matching the heights of improvement recorded in Q3 (82% reported an increase), this nevertheless continues to represent a strong recovery from the equivalent period the previous year which included the aftermath of the 2005 London bombings.

The other region to report particularly strong performance in Q4 2006 relative to 2005 was the West Midlands, where 53% of attractions reported an increase in visits compared with 28% reporting a decline. The East Midlands (37%) and South West (38%) also recorded above average proportions of attractions with an increase in visits, as they had done in each of the previous two quarters.

Regions recording year-on-year falls in visitor volumes between the two Quarter 4 periods significantly higher than the national average of 29% of attractions were the North East (43%), South East (37%) and Yorks & Humber (35%). The former two regions also experienced a greater than average decline in Q3.

7.0 Average Visitor Numbers - by month

Quarter 4 Visit Trends 2006 – By Average Visitor Numbers



Attraction sample: The means are based on a constant sample of attractions providing data for each month between January 2006 and December 2006 (n = 426)

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, Quarter 3 and Quarter 4 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 21,856 visitors, closely followed by July with an average of 19,358 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, September and October.

8.0 Average Visitor Numbers during Quarter 4 - by Region

Region	Sample	Mean number of visitors		
		OCTOBER 2006	NOVEMBER 2006	DECEMBER 2006
North East	(32)	4,017	1,986	1,353
North West	(44)	21,393	12,078	11,836
Yorkshire & the Humber	(60)	5,523	2,280	2,049
East Midlands	(32)	4,076	2,829	2,180
West Midlands	(35)	3,709	1,932	3,145
East	(43)	2,923	1,456	1,586
London	(43)	81,894	59,906	59,583
South East	(63)	9,314	4,855	4,469
South West	(74)	6,699	3,161	3,228
England	**(426)**	**15,002**	**9,550**	**9,431**

The table above shows the average visitor numbers by region during each month of the Quarter 4 2006 period (based on attractions reporting numbers for each of the Quarter 1, Quarter 2, Quarter 3 and Quarter 4 periods).

Average visitor numbers during October 2006 were significantly higher than recorded in either November or December across all regions. Average visitor numbers were similar in both November and December.

9.0 Average Visitor Numbers during Quarter 4 - by attraction type

Attraction Category	Sample	Mean number of visitors		
		OCTOBER 2006	NOVEMBER 2006	DECEMBER 2006
Historic houses/castles	(142)	5,809	2,586	2,326
Other historic property	(44)	5,224	2,322	1,797
Place of worship	(9)	18,654	13,857	17,227
Museums/art galleries	(122)	25,029	19,392	17,842
Country parks	(6)	30,562	26,313	25,449
Farms	(8)	5,891	2,554	3,626
Gardens	(23)	9,556	4,240	4,603
Leisure/theme parks	(4)	55,900	26,299	30,617
Steam/heritage railway	(9)	5,975	1,526	10,125
Heritage/visitor centre	(22)	6,213	3,410	3,882
Wildlife attractions/zoo	(19)	12,769	4,919	5,321
Workplaces	(7)	773	236	171
Other	(11)	91,143	49,408	53,422
England	**(426)**	**15,002**	**9,550**	**9,431**

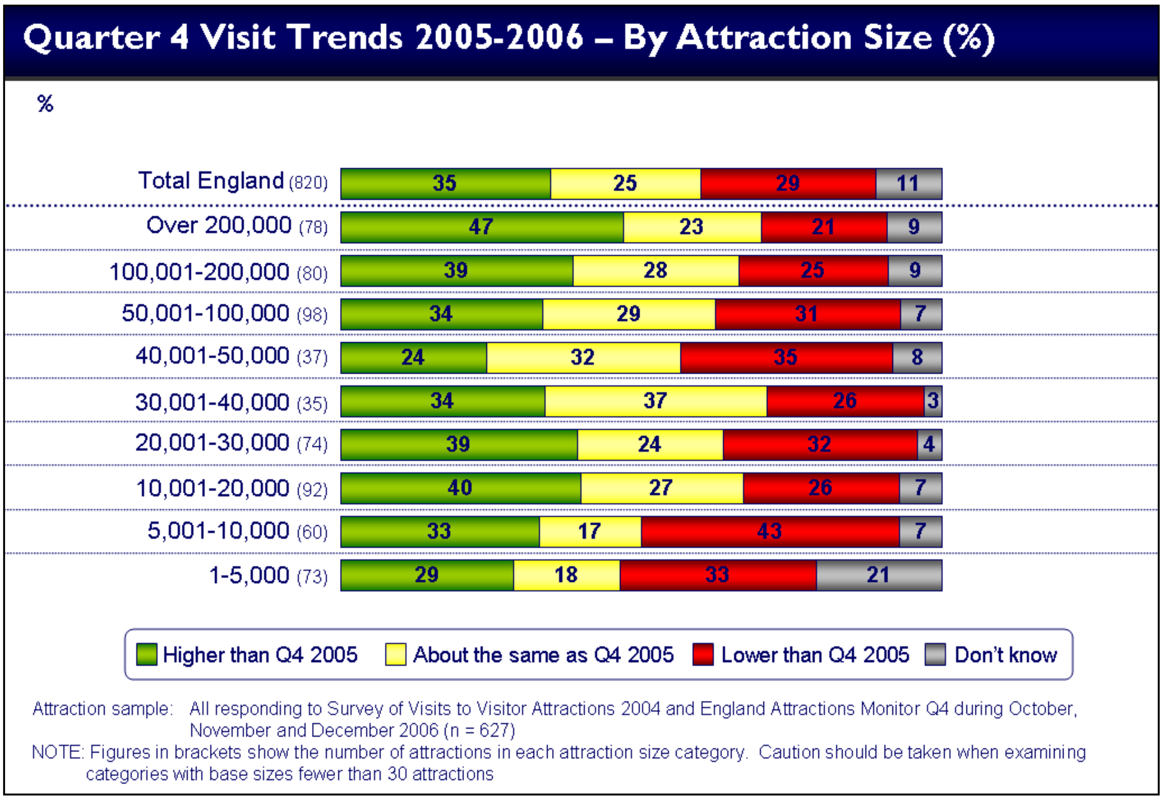
Table 9.0 shows the average visitor numbers by attraction type during each month of the Quarter 4 2006 period (based on attractions reporting numbers for each of the Quarter 1, Quarter 2, Quarter 3 and Quarter 4 periods).

With the exception of steam/heritage railways (which have significantly higher average visitor numbers in December than the other two months of the quarter), each attraction type recorded higher numbers of visitors in October than in either November or December.

Whilst the majority of attraction types recorded significantly higher visitor numbers in October, there were several attraction types where visitor numbers were similar across all three months. Places of worship, museums and art galleries and country parks, whilst all reporting higher visitor numbers in October, also recorded relatively high levels of visitor numbers in both November and December.

The highest average visitor volumes for Q4 was once again recorded by leisure and theme parks.

10.0 Quarter 4 Visit Trends 2005-2006 – By Attraction Size (%)[1]



The performance of attractions recording 200,000 visitors or more (on an annual basis) was once again positive in Quarter 4 2006 as it had been in Quarter 3. Almost half (47%) of attractions in this category recorded an increase in visitor numbers between the two Quarter 4 periods, compared to a national average of 35%. This represents a positive progression from Quarter 2 2006 when the proportion reporting a decline was higher than average.

As in each of the previous quarters of 2006, 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. This supports the 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.

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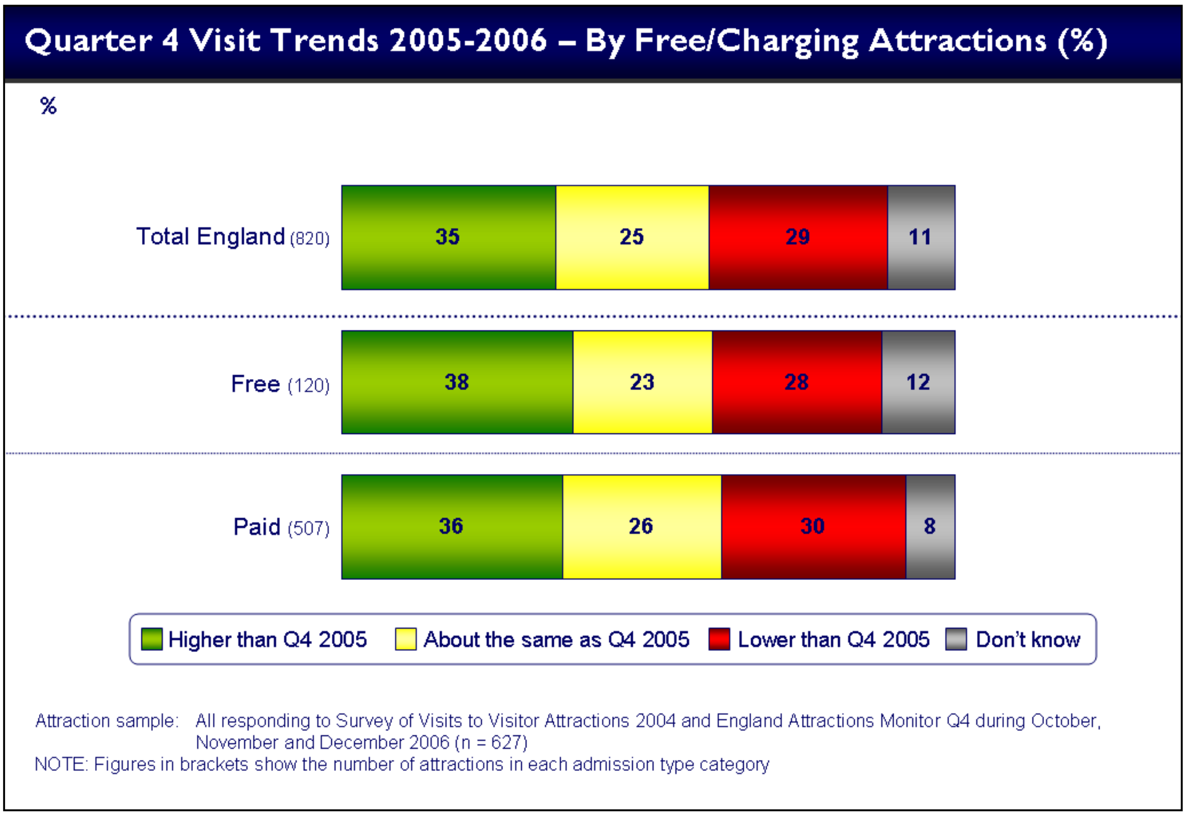
[1] Attraction size data has been taken from annual visitor figures provided by attractions responding to the Survey of Visits to Visitor Attractions 2004 (also managed by BDRC on behalf of VisitBritain). The chart is based on the 627 attractions who provided visitor figures for October, November and December 2006, and for whom annual admissions data is also available.

11.0 Quarter 4 Visit Trends 2005-2006 – By Free/Charging Attractions (%)[2]



The pattern observed in each of the previous two quarters for free attractions to be performing more positively year-on-year than paid attractions, has continued in Quarter 4 2006. 38% of free attractions recorded a year-on-year increase in admissions during Quarter 4 2006 compared to 36% of paid attractions (and a national average of 35%). However, this pattern is not as pronounced as observed in Quarter 3.

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 (40%) in visitor volumes.

[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 627 attractions who provided visitor figures for October, November and December 2006, and for whom admission type data is also available.