

# England Attractions Monitor

Quarter 3 Report

July – September 2011



VisitEngland 

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# Background, objectives & methodology



# Background, objectives & methodology

- In January 2006, VisitEngland commissioned BDRC Continental 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.
- Objective to create a panel of **c.600 attractions** comprising:
  - c.300 individual attractions recruited online, with geographic spread across England
  - c.300 English Heritage/National Trust properties (with visit admissions data for each property provided centrally)
- During the third 2011 quarterly period (July to September), **671 attractions** provided data, consisting of:
  - 365 individual attractions recruited online;
  - 306 English Heritage/National Trust properties (admissions data only)
- A cross-section of attractions was recruited according to type, size and free/paid admission. Comparisons in visitor admissions figures are always made among constant samples where appropriate.

**Quarter 3 2011:**

# **Summary of findings**



## Quarter 3 2011: Summary of findings (1)

- By way of context, the weather in Q3 was generally unsettled. July was colder than average, with above average rain in the North of the country. August was characterised by a lack of sunshine with some areas seeing above average rainfall. September was much warmer, particularly at the end of the month, with rainfall again variable (dry in eastern areas, but wetter to the north and west)
- Visit admissions again increased in Q3, up by +2% year-on-year, although this rate of increase was lower than the previous two quarters of the year. A weaker August (visits up less than 0.5%) restricted growth.
- There was a notable geographical divide, with attractions in the North seeing visits decline overall, but attractions in the Midlands and South (particularly Eastern areas) performing above average in terms of visits. Coastal attractions (-2%) saw visits decrease.
- Increases in visits appear to have been driven for many attractions by visitors from the immediate locality. There are perceptions that visitors from overseas have generally declined.
- In line with slowing rates of visit increases, views of Q3 business performance also softened. This was exacerbated by an overall feeling of continued pressure upon visitor spend and other revenue streams. However, attractions are generally satisfied with their performance in the context of the current testing economic market conditions.

## Quarter 3 2011: Summary of findings (2)

- Although short term confidence for the forthcoming Q4 has shown some encouraging signs (perhaps influenced by the fine early Autumn weather), the longer term outlook remains challenging, with fewer attractions feeling optimistic about the next 12 months than at any time during the past year.
- The overall economic climate continues to be the major concern for attractions, with emphasis upon the public paying closer attention to their discretionary spend choices.
- Free and urban attractions continue to feel the most optimistic.
- Whilst secondary spend by visitors remains a concern, there are signs of improvement – a third feel that this is increasing, the highest level for a year. Both retail (improvements driven by low rather than high value items) and catering (café/restaurant spend rather than takeaways) showed signs of improvement.
- Optimism over the impact of the Diamond Jubilee remains strong, with 40% of attractions feeling that this will have a positive impact. Attitudes towards the Olympics are more variable and perhaps there are some signs of more caution, even in London where perceived impact is most positive (positive impact has declined from 60% at Q1 to 48% at Q2 to 44% at Q3).

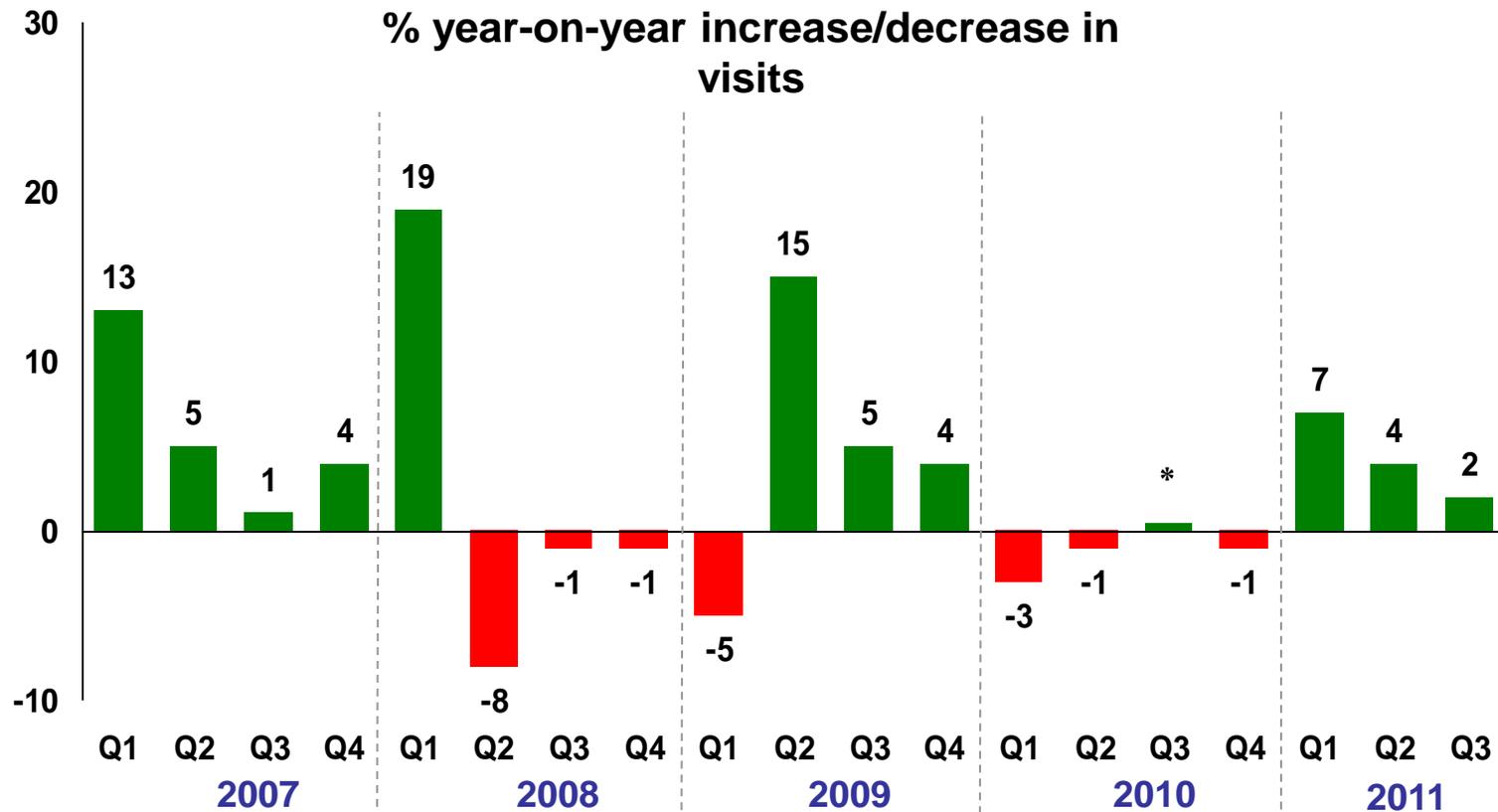
# Main Findings:

## Visit Trends



# Year-on-Year Quarterly Visit Trends

Whilst visits have continued the trend of increasing year-on-year, the rate of increase has slowed somewhat in Q3, with visits increasing by an average of 2% compared with Q3 2010.



\* = less than 0.5%

Base: All Q3 2011 attractions (671)

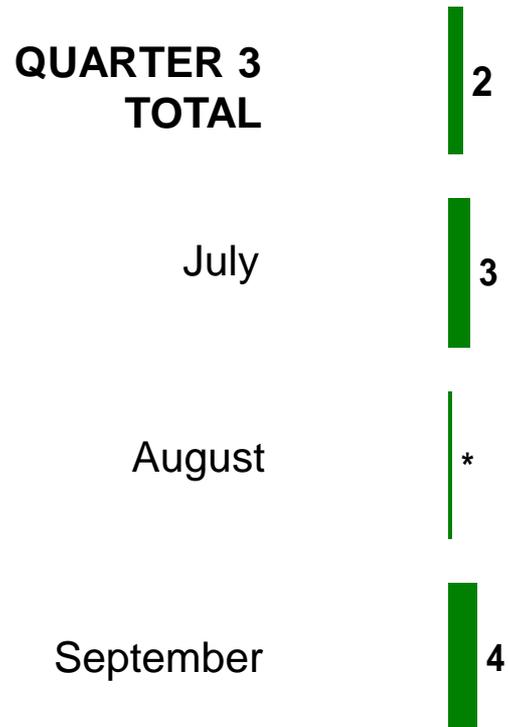
# Quarter 3 (Jul-Sep): Visit Trends 2010-2011

Visits increased year-on-year in each month of Q3, although this increase was very limited in August. The weather was predominantly dull in August with some areas suffering high levels of rainfall. Attractions were almost as likely to report a decrease in visits as they were report an increase in Q3.

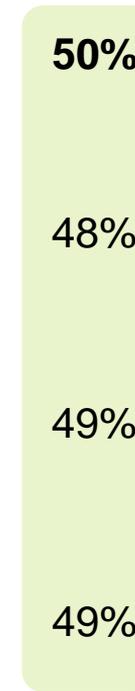
% any decrease  
in visits



% Increase/Decrease in Visits



% any increase  
in visits



\* = less than 0.5%  
Base: All attractions (671)

# Quarter 3 (Jul-Sep): Visit Trends 2010-2011 – By Region

There were notable regional variations in visit trends, with attractions in the South (particularly the East) and Midlands performing better than those in the North of the country. This reflects regional weather variations, which saw generally wetter weather in the North. This had a particular impact on attractions in August. Conversely, Midlands and Eastern areas experienced a dry and warm September, helping to generate strong increases in visitor numbers for attractions within these areas.

Region	Total Qtr 3 Change (%)	Jul Change (%)	Aug Change (%)	Sep Change (%)
<b>TOTAL ENGLAND (671)</b>	<b>2</b>	<b>3</b>	<b>*</b>	<b>4</b>
North East (51)	-4	-1	-5	-5
North West (76)	*	8	-5	-2
Yorkshire & The Humber (61)	-3	4	-8	*
East Midlands (65)	2	-5	1	10
West Midlands (57)	9	11	8	8
East of England (76)	6	1	7	11
London (33)	4	6	-1	8
South East (132)	3	2	2	5
South West (120)	1	1	2	-1

\* = less than 0.5%

Base: All attractions (671)

# Quarter 3 (Jul-Sep): Visit Trends 2010-2011 – By Attraction Category

Historic properties continue to outperform the market. We have seen in previous waves that the widespread adoption of membership schemes within this sector has helped attractions perform positively in terms of visits (we have seen the public squeezing as much as possible from their memberships in this economic climate). Gardens also continue to perform well, despite the unsettled weather during Q3.

Attraction Category	Total Qtr 3 Change (%)	Jul Change (%)	Aug Change (%)	Sep Change (%)
<b>TOTAL ENGLAND (665)</b>	<b>2</b>	<b>3</b>	<b>*</b>	<b>4</b>
Historic Houses/Castles (255)	4	3	5	4
Other historic properties (61)	5	6	2	6
Museums/art galleries (135)	3	3	-3	14
Gardens (45)	9	4	16	6
Visitor/heritage centres (24)*	-15	-19	-11	-13
Wildlife attractions/zoos (25)*	3	13	-6	9
Others (126)	-3	*	-5	-5

\* = less than 0.5%

\*CAUTION: Low base size

Base: All attractions (671)

# Quarter 3 (Jul-Sep): Visit Trends 2010-2011 – By Other Segments

Although bucking the trend in some quarterly periods, it continues to be the smaller attractions (with fewer than 20,000 visitors per annum) that report the smallest increases in visit admissions. Evidence from Q3 also indicates that coastal attractions have found the summer period a tougher this year, with visits declining by -2% (the South West also saw one of the lowest increases in visits in Q3). Paid attractions have also outperformed the free attractions this summer.

	Total Qtr 3 Change (%)	Jul Change (%)	Aug Change (%)	Sep Change (%)
<b>TOTAL ENGLAND (671)</b>	<b>2</b>	<b>3</b>	<b>*</b>	<b>4</b>
<b>Visits per annum</b>				
Over 200,000 (48)	-1	2	-4	2
100,001 – 200,000 (80)	4	3	3	6
50,001 – 100,000 (101)	3	5	3	2
20,001 – 50,000 (167)	4	2	5	6
20,000 or less (271)	*	-1	-2	5
<b>Free/paid</b>				
Paid (534)	3	3	1	3
Free (137)	*	*	-3	4
<b>Location</b>				
Coastal (74)	-2	-3	-3	-1
Rural (380)	3	2	3	3
Urban (217)	3	6	-3	6

\* = less than 0.5%

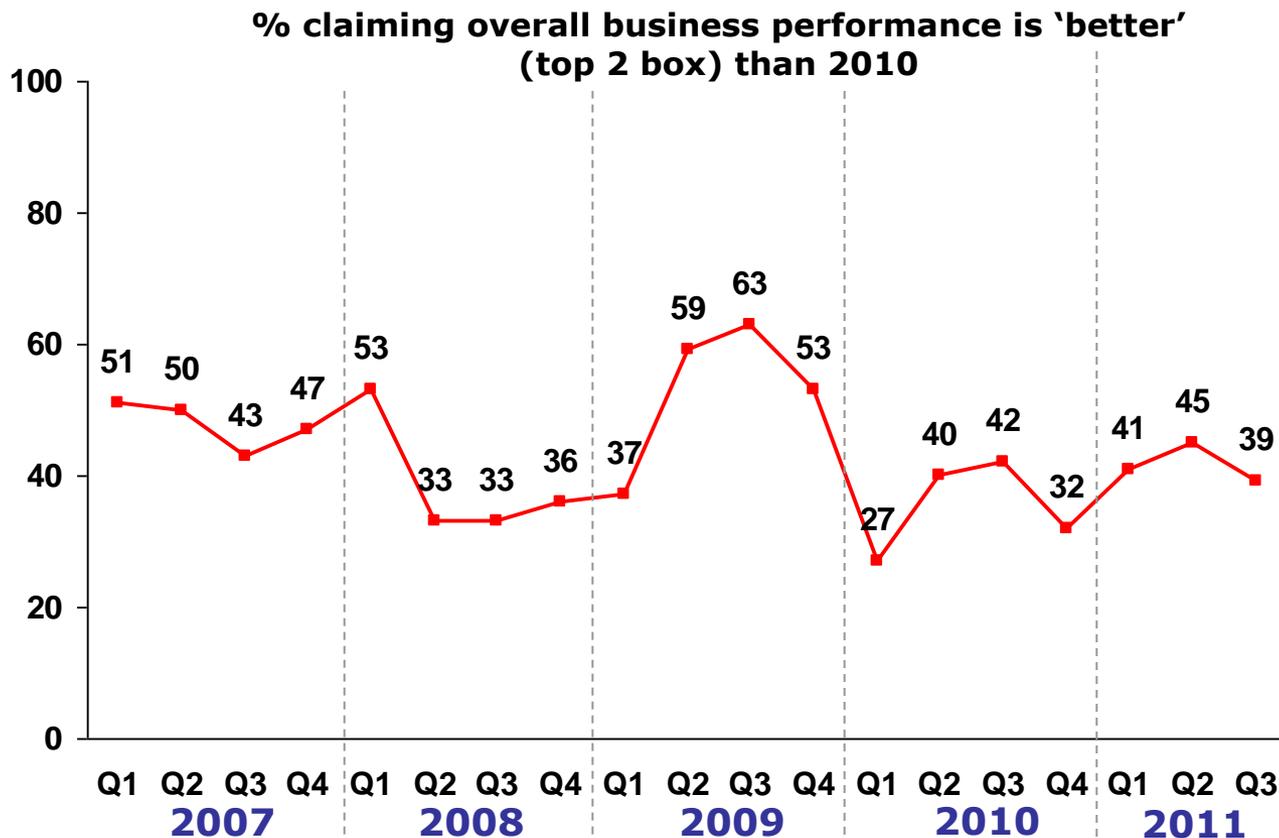
Base: All attractions (671)

# Main Findings: Business performance and confidence



# Overall Business Performance Trends

In line with the slowing rate of increase in visit admissions and the increased proportion of attractions experiencing a decline in visits during Q3, there has been a softening of opinion on overall business performance for the quarter. 39% of attractions felt that their business performance was better than the equivalent period last year, compared with 42% reported last year and 63% in 2009. This is the first time since 2007 that the proportion feeling that their performance was 'better' declined between Q2 and Q3.



Base: Q7: Non EH/NT attractions (365)

# Quarter 3 (July-Sep): Overall Business Performance Trends 2010-2011

As for visits themselves, Q3 saw similar proportions of attractions feeling that their business performance was 'better' and 'worse' than the equivalent period of 2010. London and the West Midlands were most likely to feel that their performance had improved. As with visits, historic properties were most likely to feel that their performance had improved. The business performance of urban attractions was, once again, also notably more positive.



	<b>% Better than 2010</b>
West Midlands	56
London*	63
Free admission	48

	<b>% Better than 2010</b>
Urban	45
Coastal	40
Rural	34
Historic houses/castles	48

Base: Non EH/NT attractions (365)

\*CAUTION: Low base size

Q. We would now like you to think about how the overall business performance of your attraction has changed in the July to September 2011 period compared with July to September 2010. Would you say that your overall business performance in the July to September 2011 period was....?

## Quarter 3 (Jul-Sep): Reasons for Business Performance Jul-Sep 2011 – Positives

Among those attractions feeling that their business performance was better this year, the strongest reason for this was an increase in local people taking day trips. The influence of special exhibitions and events is also highly noteworthy and reflects findings from previous waves. In this economic climate, attractions use of PR to gain publicity is also perhaps stronger than their use of paid for marketing.

	Quarter 3 2011 (%)	
	Any Reason	Most Influential
More local people taking day trips	42	14
More/better publicity/PR	41	10
More domestic holidaymakers in the area	37	7
More/better special exhibitions/events	36	14
Other improvements/investments made to attraction	31	9
The weather	27	10
New attraction feature(s)	24	7
More overseas visitors to the area	18	4
Improved/more spend on marketing and promotion	16	5
Changed/cheaper pricing/more deals/discounts	8	3

Base: Non EH/NT attractions stating business performance was better (144)

You said earlier that your overall business performance in July to September 2011 was better than in 2010? Which of these describes why your performance was better?

## Quarter 3 (Jul-Sep): Reasons for Business Performance Jul-Sep 2011 – Negatives

Among attractions feeling that their business performance was worse this year, the overwhelmingly dominant reason was a perception that the economic climate was continuing to worsen. Verbatim comments made by attractions indicate a growing feeling that the public are increasingly cautious about discretionary spend choices.

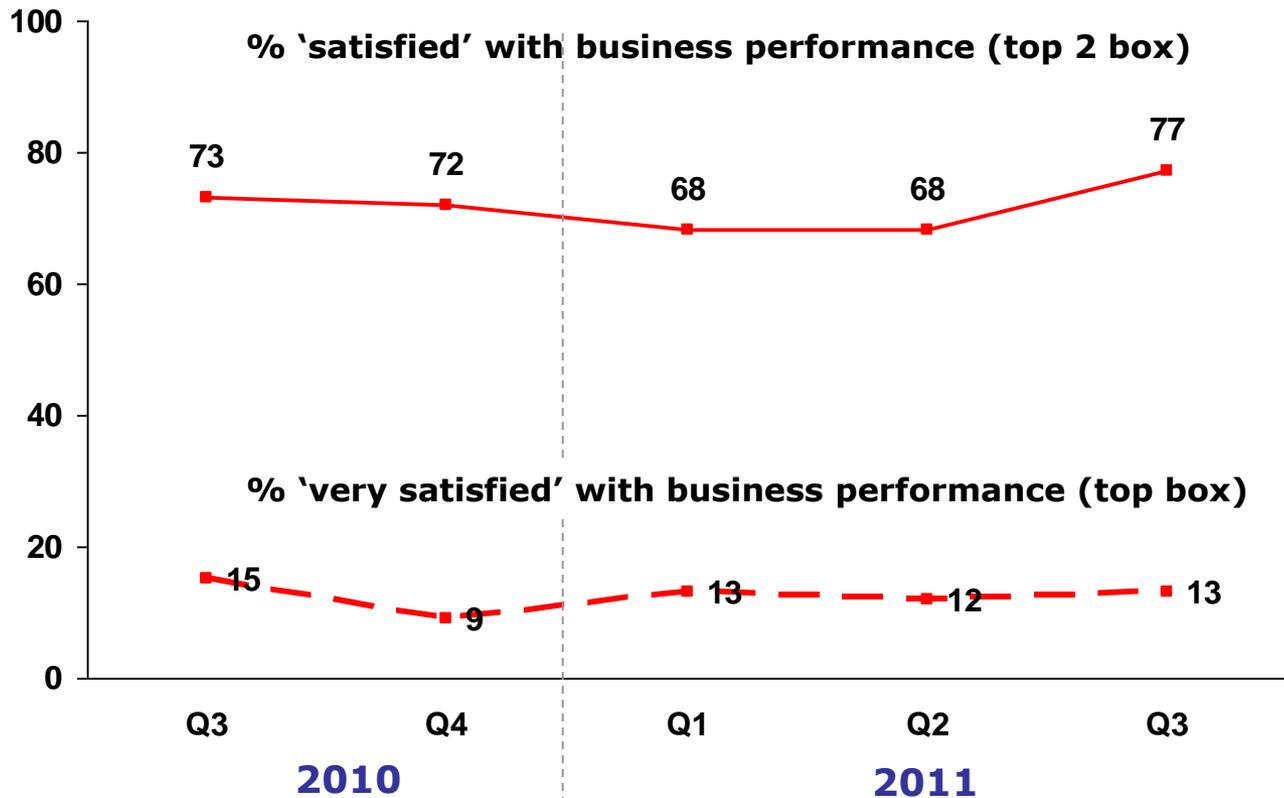
	Quarter 3 2011 (%)	
	Any Reason	Most Influential
Economic climate getting worse	77	43
The weather	41	10
Fewer domestic holidaymakers in the area	34	4
Fewer local people taking day trips	25	3
Fewer overseas visitors to the area	19	1
Less effective/reduced spend on marketing/promotion	14	5
Nothing new/no improvements/investments to attraction	8	1
Increased competition in area	8	1
Fewer/not as good exhibitions/events	7	2
Less/not as good publicity/PR	6	2
Increased prices	5	1
Riots/unrest in August	3	-

Base: Non EH/NT attractions stating business performance was worse (154)

You said earlier that your overall business performance in July to September 2011 was worse than in 2010? Which of these describes why your performance was worse?

# Overall Satisfaction with Business Performance Trends

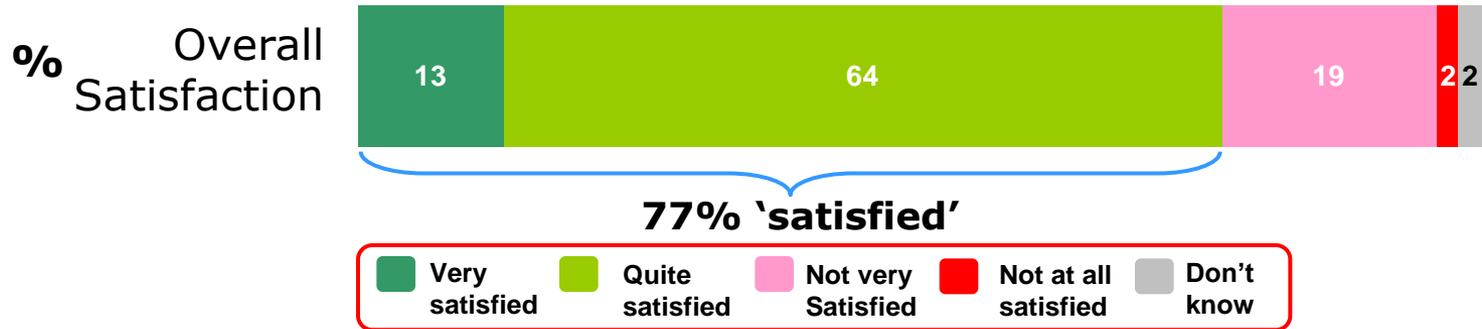
Although business performance itself appears to be softening slightly, satisfaction with business performance is increasing. It is perhaps that attractions consider their own performance in the context of the prevailing difficult market conditions – an indication that attractions are increasingly feeling that they are dealing with the market conditions effectively.



Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Overall Satisfaction with Business Performance

Attractions in London and the West Midlands are most likely to feel satisfied with their business performance, along with free and urban attractions. As with visits themselves, coastal attractions were least likely to be satisfied with their performance.



	% Satisfied
Free	84
Paid	74
Urban	83
Rural	75
Coastal	70

	% Satisfied
West Midlands	89
London*	87

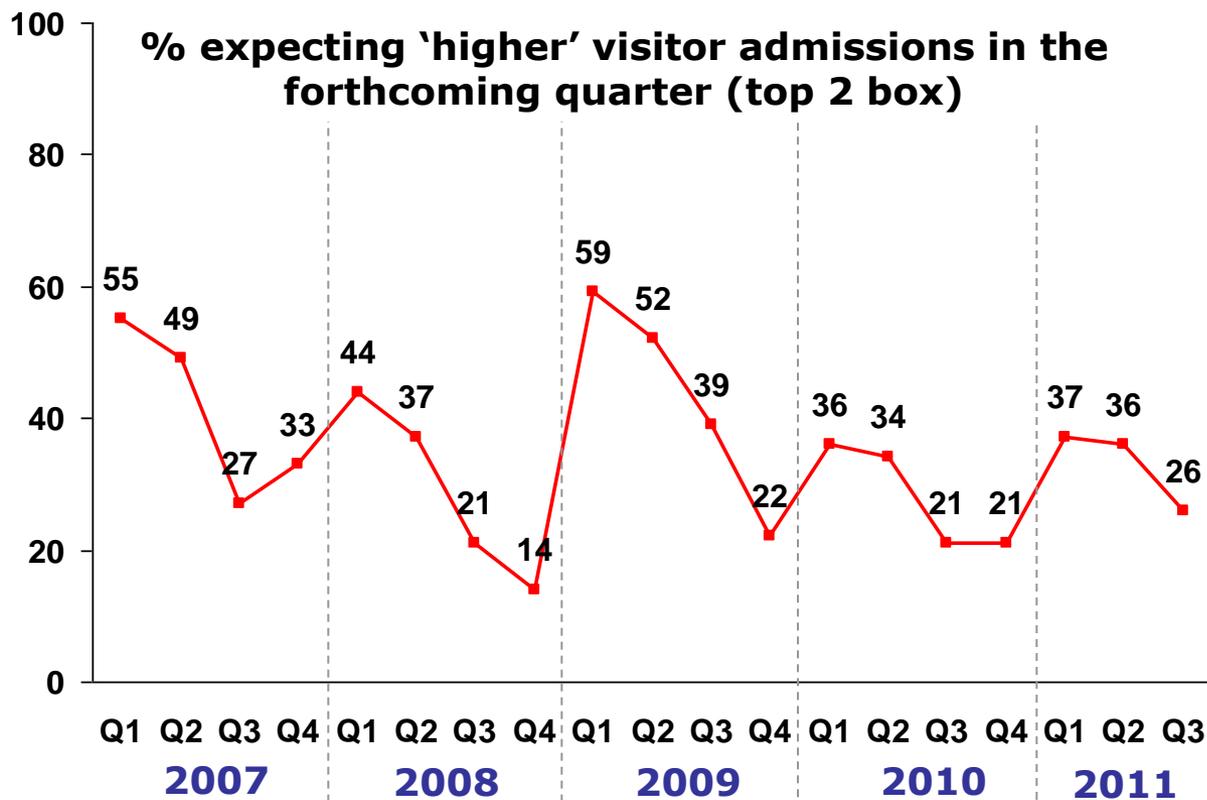
Base: Non EH/NT attractions (365)

\*CAUTION: Low base size

Q. Overall, how satisfied have you been with the performance of your business this quarter (July – September period)?

# Visit Expectations Trends

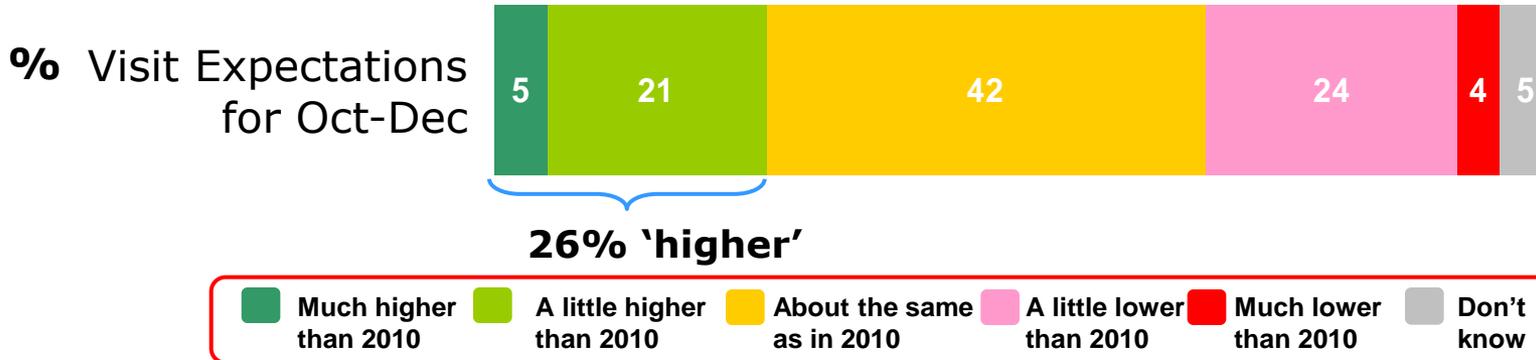
It is important to note that the proportion of attractions expecting visits to increase during the forthcoming Q4 period are always much lower than in other quarters of the year – the opportunity to increase visits is simply much lower for many attractions in this quarter. With this in mind, the proportion of attractions expecting an increase in visits for Q4 has increased this year – an indication that whilst business performance might be softening, this is less driven by visitor volume itself and more driven by other business factors, including spend.



Base: Q Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Visit Expectations for Oct-Dec 2011

Proportions expecting visits to increase are again similar to those expecting a decrease for Q4, with London attractions, free and urban attractions again the most confident.



	<b>% Higher than 2010</b>
East Midlands	32
London*	50

	<b>% Higher than 2010</b>
Free	35
Paid	21
Urban	33
Coastal	27
Rural	20

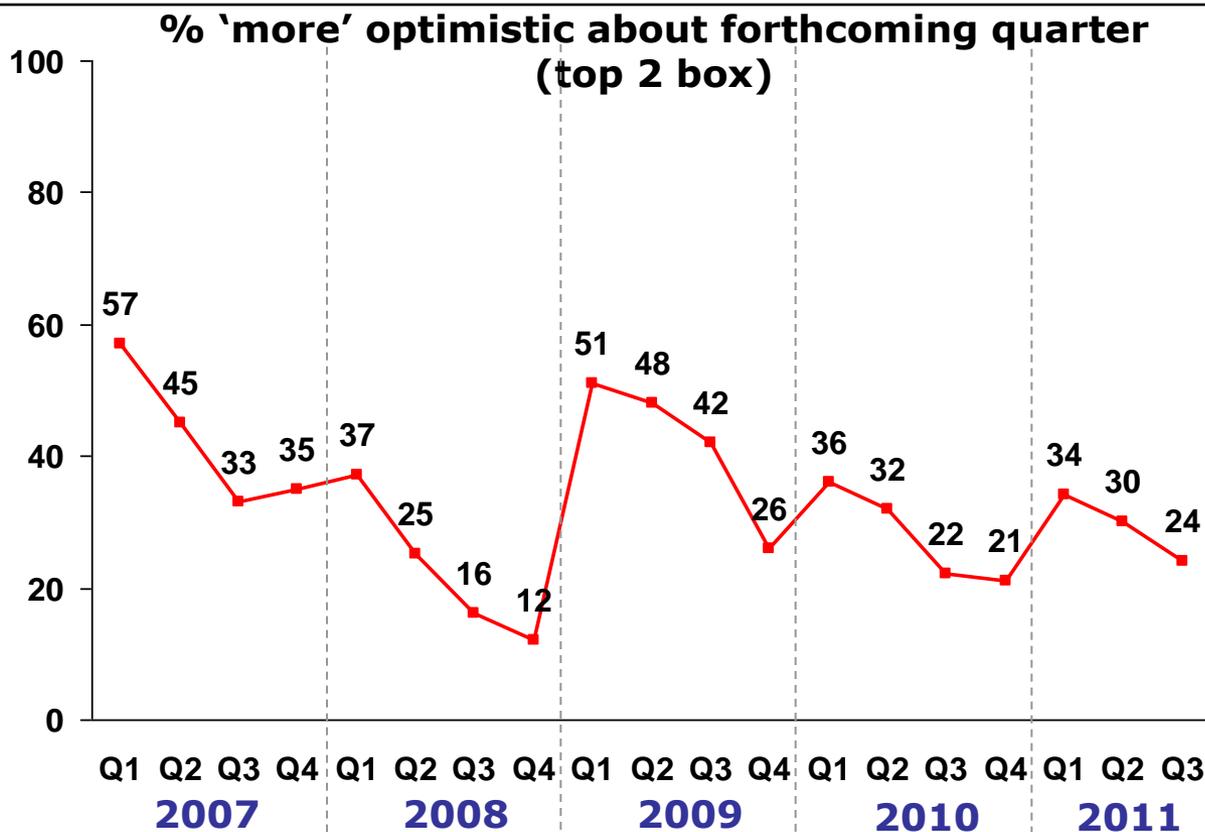
Base: Non EH/NT attractions (365)

\*CAUTION: Low base size

Q. Thinking about the October to December 2011 period, do you expect visitor numbers (paid and free) compared with October to December 2010 to be...?

# Business Confidence Trends (own attraction)

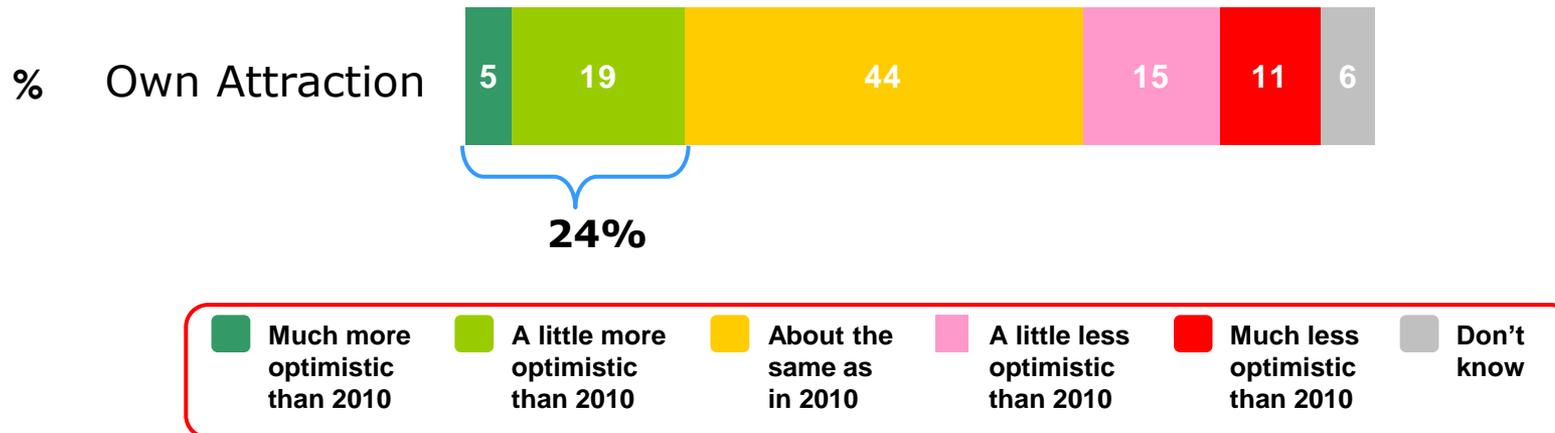
As with visit expectation trends, business confidence trends tend to start the year high and decline as the year progresses. As with visit expectations, the proportion of attractions feeling more optimistic this year is slightly higher than at the same point in 2010 (the first time that this has occurred this year) and perhaps indicates that attractions, whilst having experienced a difficult summer, are beginning to feel a little more confident – although the dry, warm weather in early October may have influenced this.



Base: Q8: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Business Confidence for Oct-Dec 2011

As with other measures, the proportions of attractions feeling more or less optimistic than at the same time last year are similar.



Base: Non EH/NT attractions (365)

Q. And compared with this time last year, which of these statements best describes how optimistic you feel about the business prospects for the attractions industry generally / your attraction's business prospects for the October to December 2011 period?

# Quarter 3 (Jul-Sep): Business Confidence for Oct-Dec 2011 (Own Attraction) – by Region

Polarisation in business confidence is reflected across most of the regions of England.

Region	% more optimistic than 2010	% less optimistic than 2010
<b>TOTAL ENGLAND (365)</b>	<b>24</b>	<b>26</b>
North East (29)*	28	21
North West (52)	27	29
Yorkshire & The Humber (38)	16	24
East Midlands (44)	30	16
West Midlands (27)*	30	22
East (44)	18	27
London (16)*	31	31
South East (68)	22	28
South West (47)	26	34

Base: Non EH/NT attractions (365)

\*CAUTION: Low base size

# Quarter 3 (Jul-Sep): Business Confidence for Oct-Dec 2011 (Own Attraction) – by Other Segments

Looking forward, it is once again the smaller attractions that feel least optimistic, along with attractions with paid admission.

		% more optimistic than 2010	% less optimistic than 2010
<b>TOTAL ENGLAND (365)</b>		<b>24</b>	<b>26</b>
<b>Visits per annum</b>	Over 200,000 (38)	28	17
	100,001 – 200,000 (35)	30	35
	50,001 – 100,000 (40)	24	19
	20,001 – 50,000 (88)	28	35
	20,000 or less (160)	19	23
<b>Free / paid</b>	Paid (245)	18	29
	Free (120)	37	19
<b>Location</b>	Coastal (41)	30	28
	Rural (184)	18	29
	Urban (140)	31	21

\* CAUTION: Low base sizes  
Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Business Confidence for Oct-Dec 2011 (Own Attraction) –by Attraction Category

There is little variation in business confidence by attraction type.

Attraction Category	% more optimistic than 2010	% less optimistic than 2010
<b>TOTAL ENGLAND (365)</b>	<b>24</b>	<b>26</b>
Historic Houses/Castles (49)	27	20
Other historic property (11)*	23	11
Museums/art galleries (130)	23	22
Visitor/heritage centres (22)*	31	24
Wildlife attractions/zoos (22)*	29	31
Gardens (15)*	25	22
Others (114)	21	34

\*CAUTION: Low base sizes

Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Reasons for Business Confidence Oct-Dec 2011 (Own Attraction) – Positives

Drivers of optimism for the forthcoming Q4 2011 remain varied: actions taken by attractions themselves such as recent investment in improvements to events/exhibition or site generally remain the most likely source of optimism. A general increase in visitor numbers is also a driver of optimism

	Quarter 3 (>2%)
Improvements to events/exhibitions/attractions	9
Visitor number trends increased/hope it will continue	6
Refurbishments/improvements to site/investment	5
New/better/more advertising/marketing	4
Good positive weather forecast/poor weather last year	4
More/better PR/media/TV/radio/newspaper coverage publicity	2
Staffing levels better	2
Increase in school groups/better school links	2

Base: Non EH/NT attractions (365)

Why do you feel this way about your attraction's business prospects for October to December 2011?

# Verbatim – Positives

*First ever Christmas event being held over two weekends*

*We have now opened our new wing with our new blockbuster exhibition space, and have recently opened a new gallery with a huge season of events*

*Completion of major development project National award and associated press and TV coverage. Buoyant domestic market; increase in overseas visitors*

*Newly-installed play area has generated more visits from a different demographic*

*More events and activities planned, staff and volunteers enthusiastic about raising funds and profile*

*We have tightened budgets, hours and prices and believe we are in a better position to withstand a downturn than this time last year*

*We have undertaken some re-structuring and made some key staff changes. This should allow us to improve our profitability even though we don't expect many more visitors than same period last year*

*Continued programming aimed at family audiences which is proving successful*

*Due to the poor weather conditions our business suffered badly in 2010. We are hoping there will not be a repeat of the heavy Snow storms which actually caused the business to close for 7 days.*

*We are putting greater emphasis on the marketing of events and exhibitions at the gallery, and increasing outreach both within the university and the local community. This has already started to have an impact*

## Quarter 3 (Jul-Sep): Reasons for Business Confidence Oct-Dec 2011 (Own Attraction) – Negatives

Continued concerns over the economy and lower spending power of the public have been joined by concerns over visitor spend once at attractions. As is often the case looking forward to Q4, a minority of attraction's optimism is dulled by closures/part closures for refurbishment.

	Quarter 3 (%)
General visitor decline	11
Reduction in visitor/retail spend	10
Closed/part closed for refurbishment	8
Economic climate/interest rates	6
Less spending power of public	4
Visitor numbers/trends down this year	4
Lack of / declining external investment	3
Poor weather/forecast	3
Increase in entry prices/pricing issues	2
Decrease in school visits/education issues	2
Fuel/petrol prices	2

Base: Non EH/NT attractions (365)

Why do you feel this way about your attraction's business prospects for October to December 2011?

# Verbatim – Negatives

“

*Our admission prices have been greatly increased, and this has discouraged paying visitors. Retail figures for the shop are lower. Donations have decreased.*

*Council cutbacks, staff shortages, cut back on business and events programmes to attract visitors*

*Retail buying in the shop and restaurant purchases suggest recession is badly affecting consumer spending*

*It is not visitor numbers that are proving to be a problem, but their secondary spend. I feel this is only likely to become less as we approach Christmas*

*Visitor figures have been a little down on last year and I think that all business and attractions are finding it harder as visitors have less money and are less inclined to go out for the day*

*We are presently going through building work and as such our cafeteria is limited and we have lost use of the patio*

*There has been a general reduction in visitor numbers across Manchester this summer and I expect this trend to continue as the recession worsens*

*Less Christmas bookings than at same time last year*

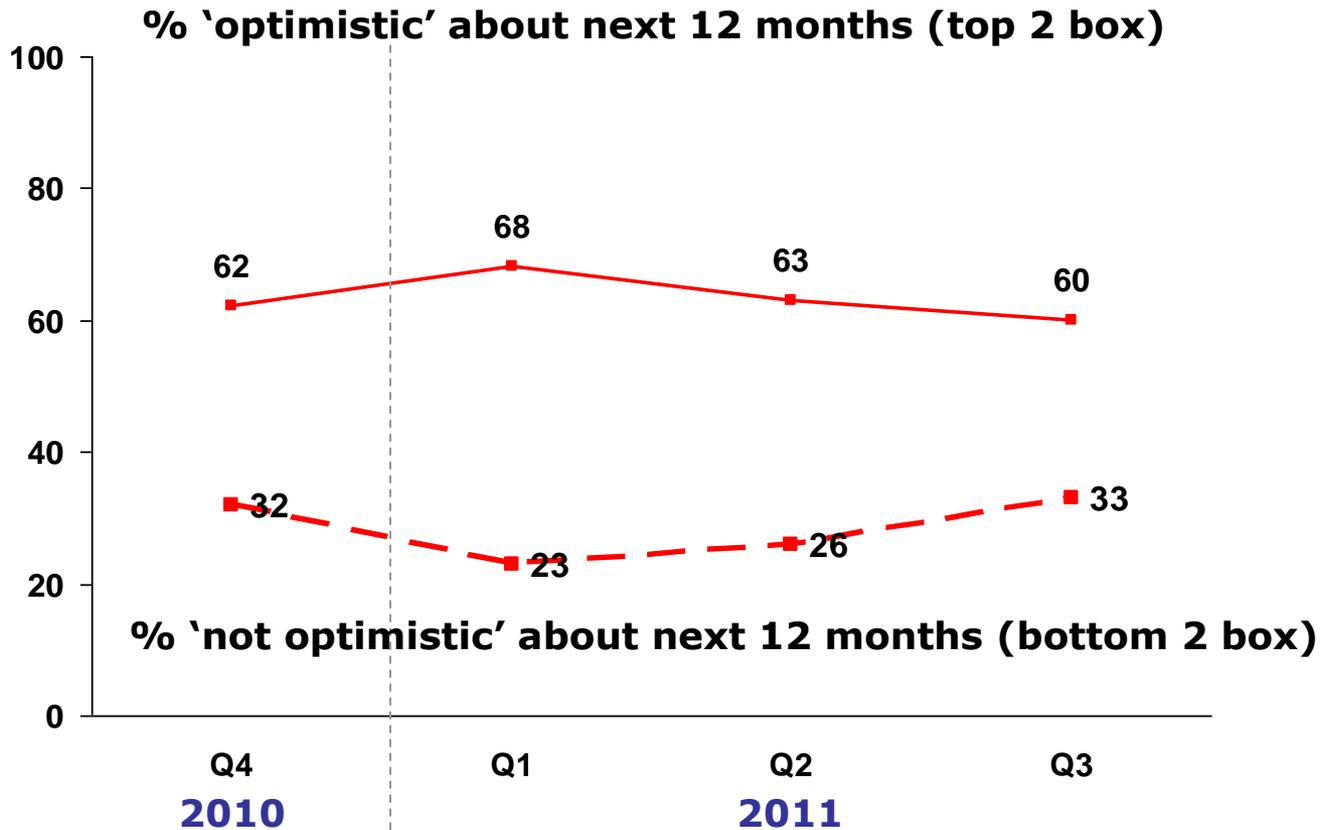
*We believe that the current economic climate is taking its toll on visitor numbers and people are spending less in our Gift Shop. So it seems the public are reigning in their spending*

*The staycation phenomenon has not impacted on the South West as predicted and visitor numbers continue to dwindle to this area as there is no funding for tourism from the District or County councils*

”

# Business Confidence for next 12 months Trends

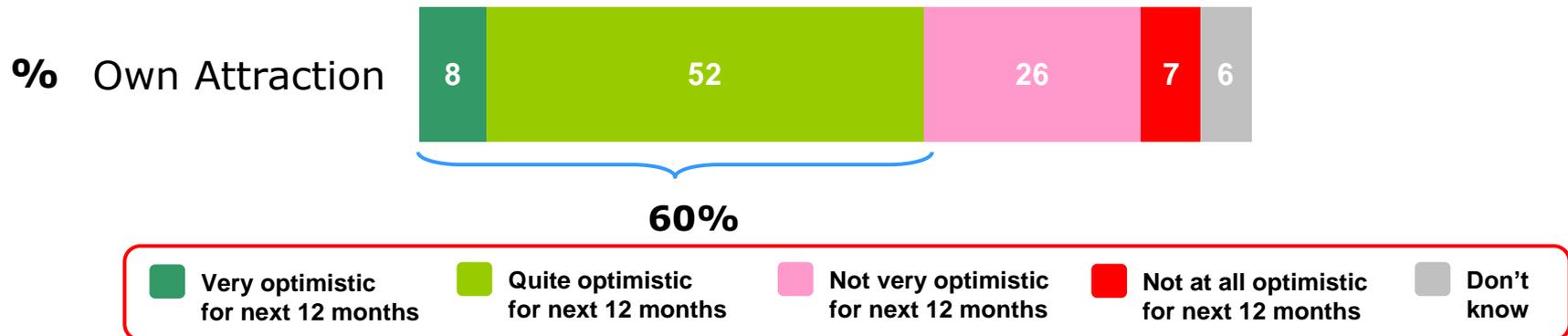
Although there appears to be a short term uplift in business confidence for Q4 2011, the longer term outlook is one of decreasing business confidence. The proportion of attractions feeling optimistic is now at the lowest levels in the past year (although it should be noted that there may be a seasonal pattern here).



Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Business Confidence for next 12 months

Despite the dip in optimism, the proportion feeling optimistic still comfortably outweighs the proportion feeling less optimistic.



Base: Non EH/NT attractions (365)

Q. Which of these statements best describes how optimistic you feel about your attraction's business prospects for the next 12 months?

# Quarter 3 (Jul-Sep): Business Confidence for next 12 months (Own Attraction) – by Other Segments

Again, free and urban attractions are feeling most optimistic about the next 12 months.

		% optimistic	% not optimistic
<b>TOTAL ENGLAND (365)</b>		<b>60</b>	<b>33</b>
<b>Visits per annum</b>	Over 200,000 (38)	64	30
	100,001 – 200,000 (35)	62	34
	50,001 – 100,000 (40)	65	29
	20,001 – 50,000 (88)	57	41
	20,000 or less (160)	60	30
<b>Free / paid</b>	Paid (245)	55	39
	Free (120)	71	22
<b>Location</b>	Coastal (41)	52	48
	Rural (184)	56	35
	Urban (140)	68	26

\* CAUTION: Low base sizes  
Base: Non EH/NT attractions (365)

## Quarter 3 (Jul-Sep): Business Confidence for next 12 months (Own Attraction) – by Attraction Category

Little variation in optimism by attraction category, although outdoor attractions seem the most optimistic.

Attraction Category	% optimistic	% not optimistic
<b>TOTAL ENGLAND (365)</b>	<b>60</b>	<b>33</b>
Historic Houses/Castles (49)	58	35
Other historic property (11)*	51	41
Museums/art galleries (130)	65	29
Visitor/heritage centres (22)*	65	21
Wildlife attractions/zoos (22)*	78	22
Gardens (15)*	66	29
Others (114)	52	42

\*CAUTION: Low base sizes

Base: Non EH/NT attractions (365)

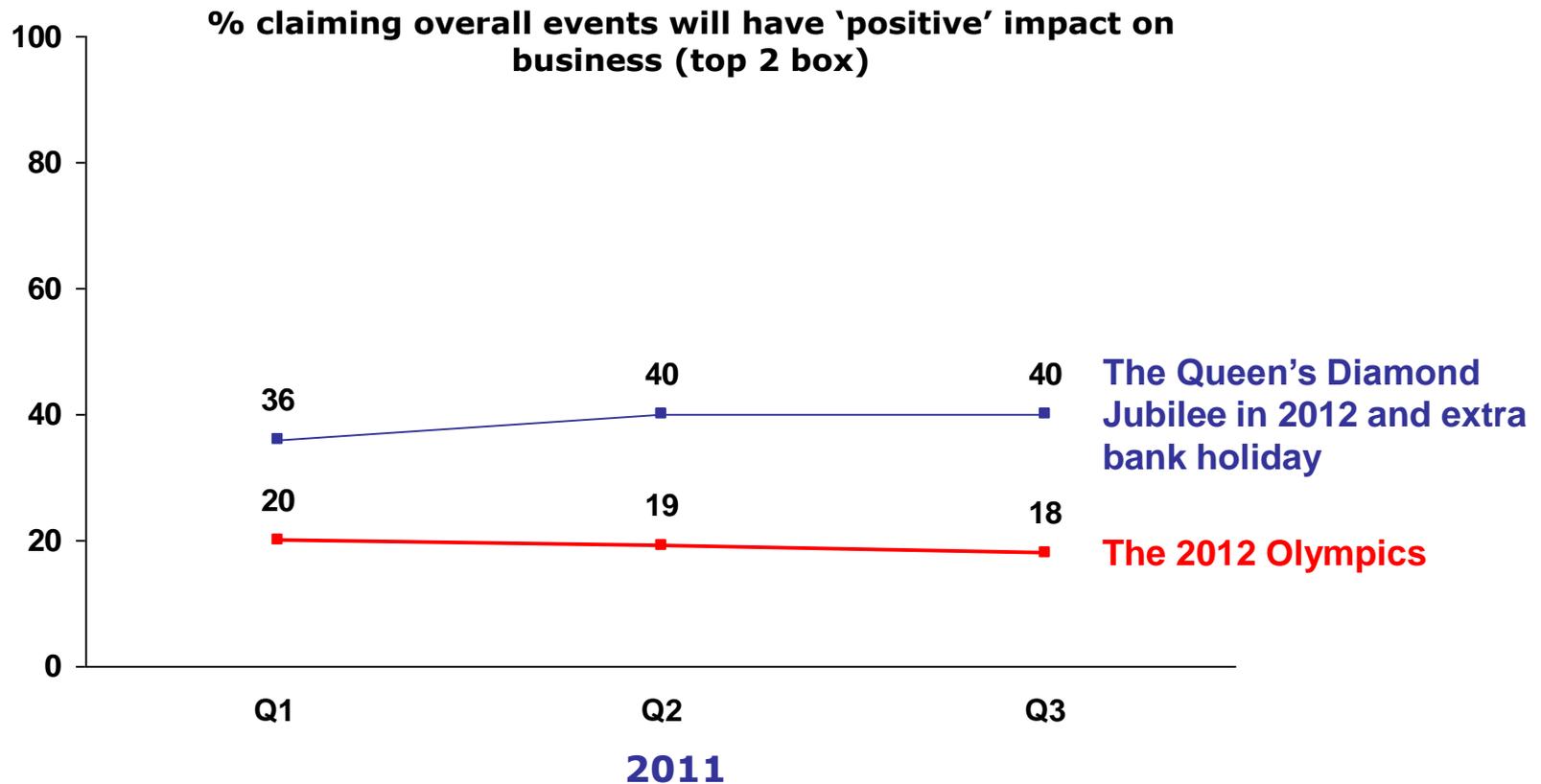
# Main Findings:

## Hot Topics



# Hot Topic Question: Impact of future public events trends

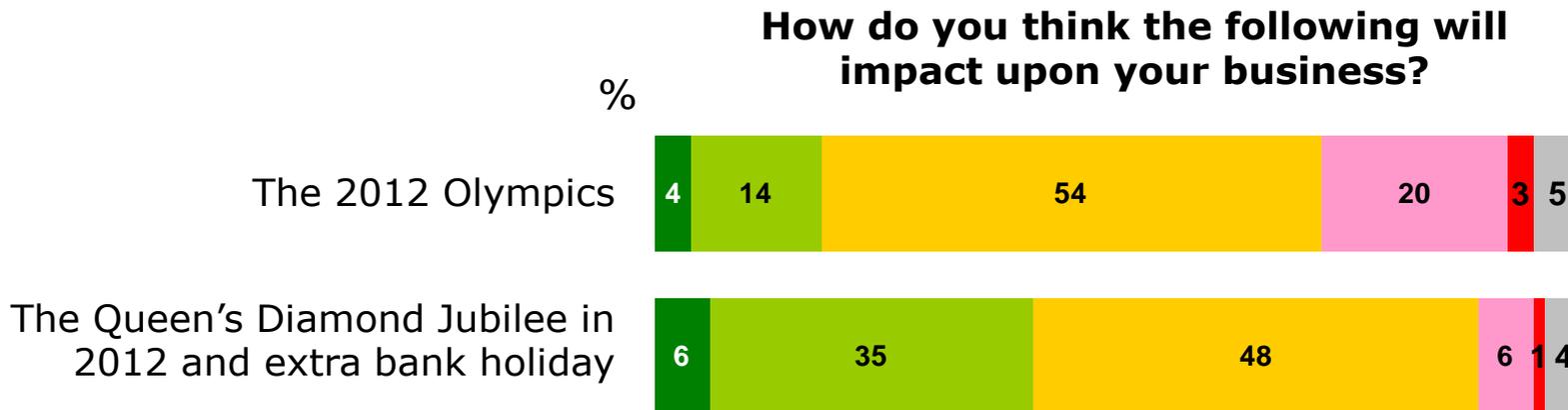
Perhaps as a result of the extra bank holiday earlier this year, there was an increase in optimism regarding the Queen's Diamond Jubilee in 2012 in Q2. This has remained stable at Q3. Optimism regarding the Olympics is perhaps beginning to decline slightly.



Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Hot Topic Question: Impact of future public events

With the Olympics less than a year away, the opinion of the impact of the games continues to be polarised. Optimism continues to be much more widespread for the impact of the Queen's Diamond Jubilee.



■ Very positive impact   
 ■ Fairly positive impact   
 ■ Little or no impact   
 ■ Fairly negative impact   
 ■ Very negative impact   
 ■ Don't know

Base: Non EH/NT attractions (365)

# Hot Topic Question: Impact of future public events (% positive impact in Q3 2011)

London is considerably more optimistic about the Olympics than the rest of the country with 44% expecting a positive impact. However, this is softening slightly given that 60% were positive at Q1 and 48% at Q2. As in previous quarters, West Midlands attractions are also more positive about the Olympics. Positive feeling about the Diamond Jubilee is much more widespread geographically, with typically between a third and half of attractions in each region feeling that this event will have a positive impact on their business.

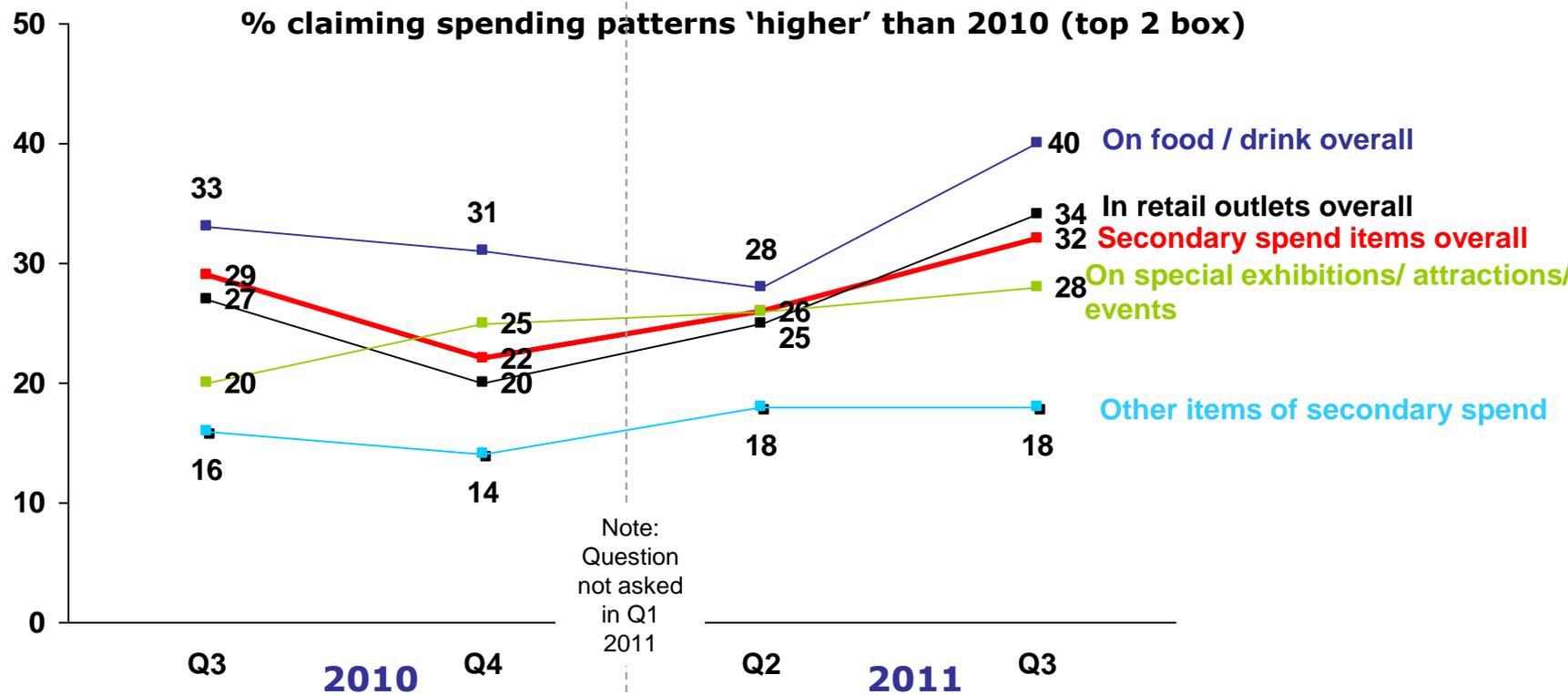
Region	Olympics (%)	Diamond Jubilee (%)
<b>TOTAL ENGLAND (365)</b>	<b>18</b>	<b>40</b>
North East (29)*	10	28
North West (52)	15	42
Yorkshire & The Humber (38)	3	42
East Midlands (44)	18	45
West Midlands (27)*	33	56
East (44)	18	39
London (16)*	<b>44</b>	38
South East (68)	24	35
South West (47)	11	36

Base: Non EH/NT attractions (365)

\*CAUTION: Low base size

# Hot Topic Question: Secondary Spend Trends

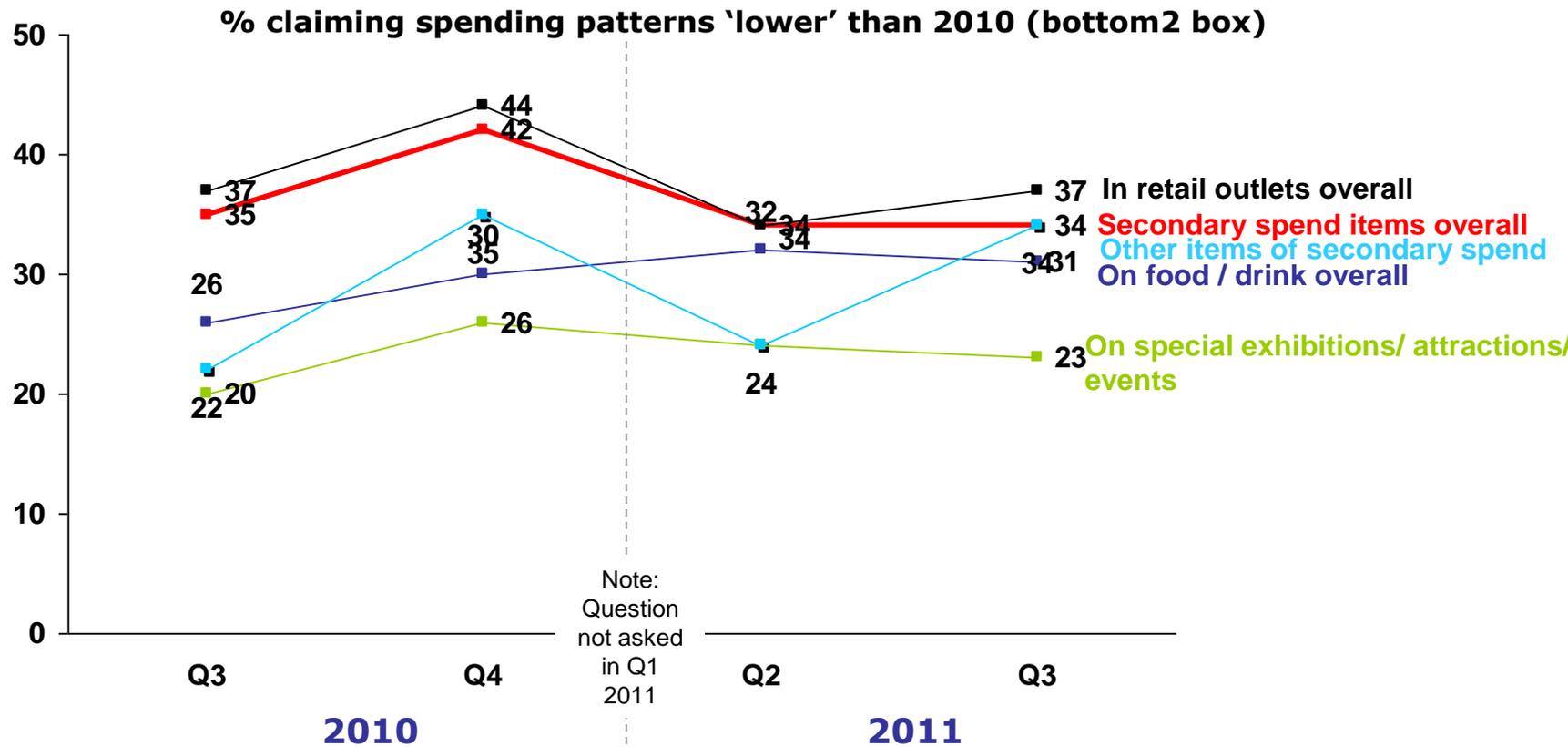
Whilst declining secondary spend is cited by many attractions as a major reason for a worsening performance, the trend at least appears to be a positive one. 32% now feel that secondary spend is higher than at the same time last year compared with 34% who felt this way at the same point in 2010. Views on overall secondary spend tend to follow views on retail spend, which appear to be coming out of the Q4 2010 trough. Spend on catering was generally less affected, although attractions feel that spend in this area has also improved significantly in Q3.



Base: Non EH/NT attractions (365)

# Hot Topic Question: Secondary Spend Trends

The proportion of attractions feeling that secondary spend is declining has also stopped increasing and also follows opinion of retail spend.

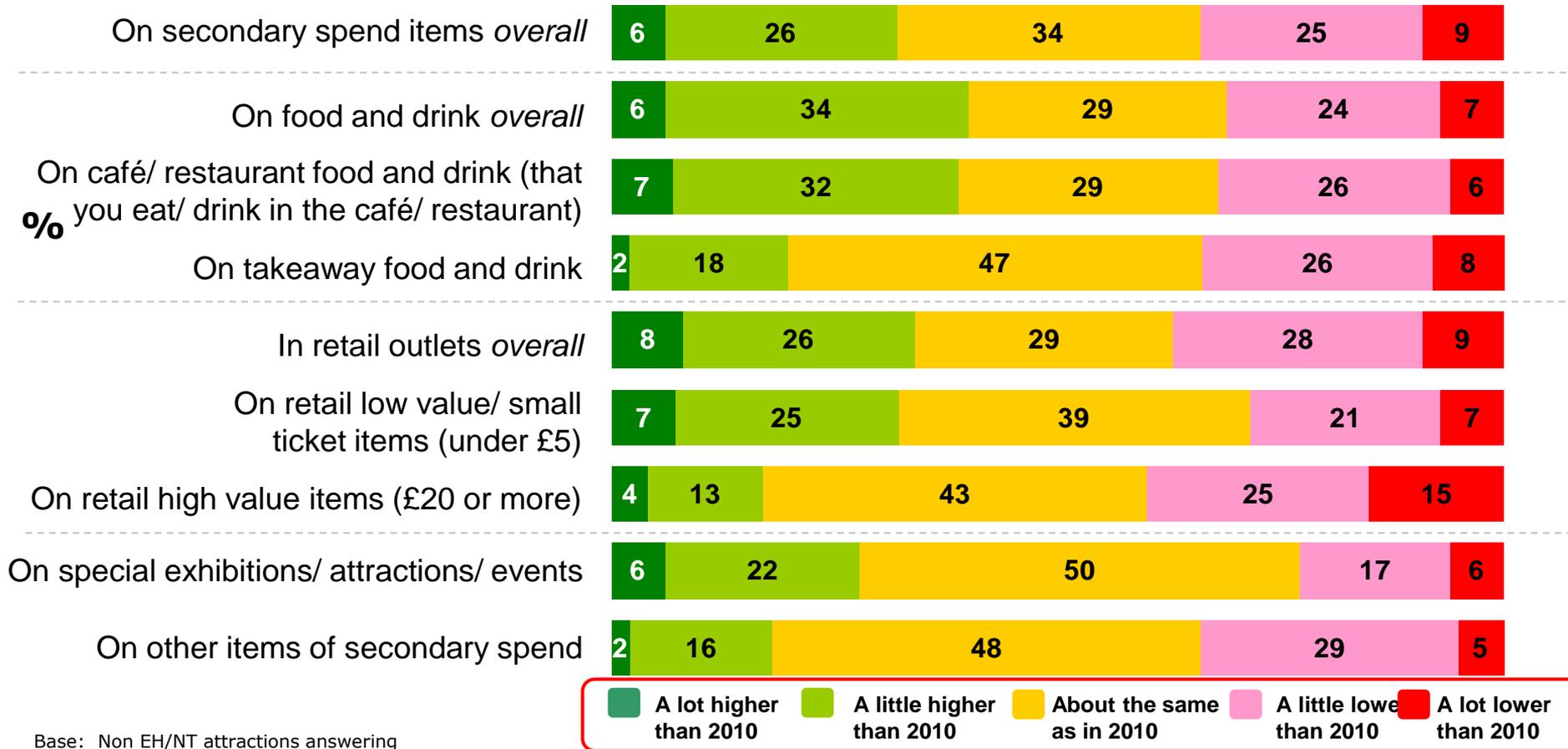


Base: Non EH/NT attractions (365)

# Quarter 3 (Jul-Sep): Hot Topic

## Question: Secondary Spend

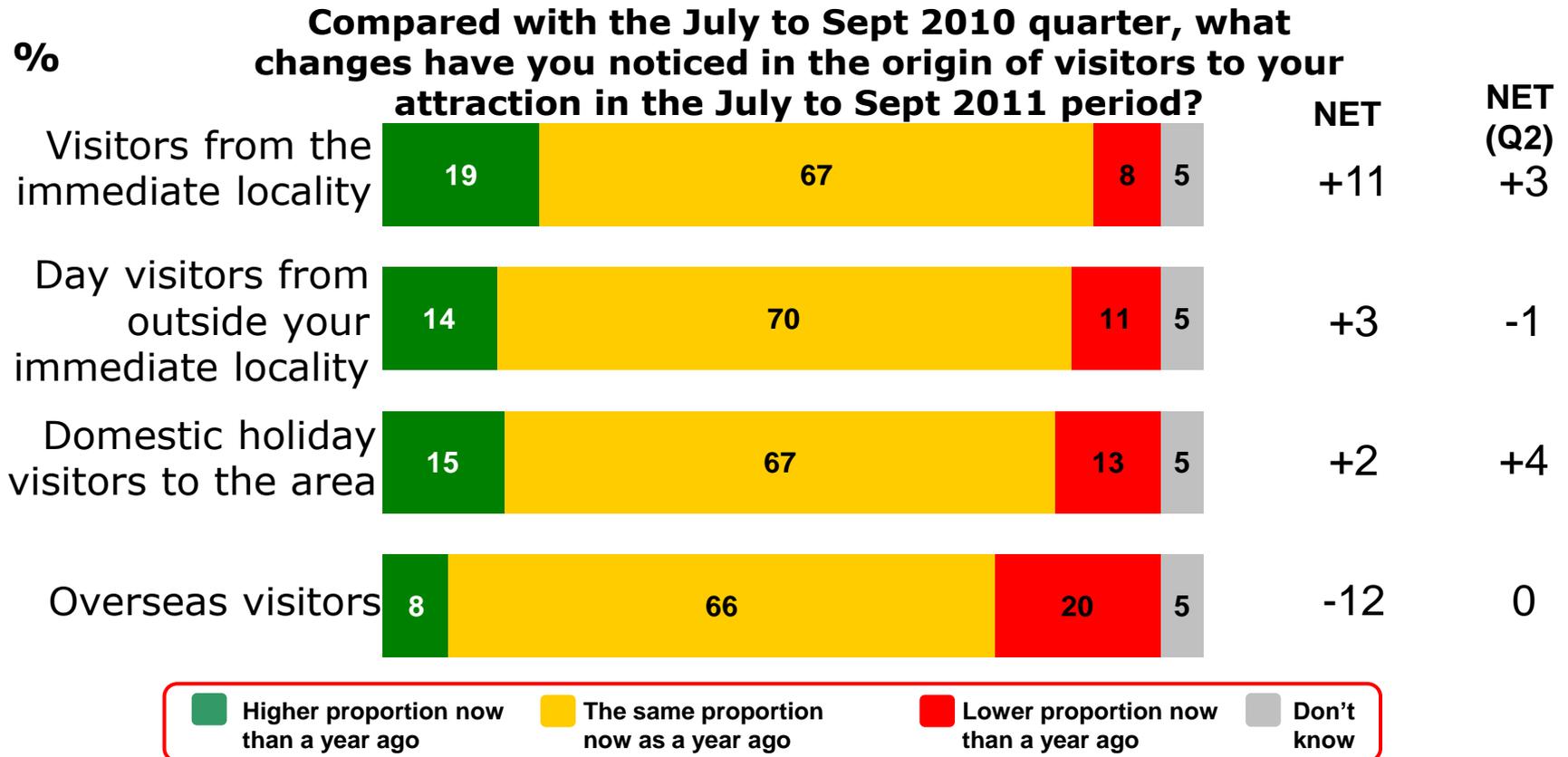
Spend on café/restaurant food has driven the recovery in catering spend. Low value retail items have driven the increase in retail spend, with high value items continuing to struggle.



Base: Non EH/NT attractions answering

# Quarter 3 (Jul-Sep): Hot Topic Question: Origin of Visitors

The positive impact of visitors from the immediate local area has been felt strongly in Q3 2011, more so than day and stay visitors from further afield. There is an overall feeling that the proportion of visitors from overseas has declined.



Base: Non EH/NT attractions (365)