England Attractions Monitor

Quarter 4 Report

October – December 2011

Contents

Background, objectives & methodology

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- 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 fourth 2011 quarterly period (October to December), **672 attractions** provided data, consisting of:
  - 365 individual attractions recruited online;
  - 307 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 4 2011:

Summary of findings

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Quarter 4 2011: Summary of findings (1)

- By way of context, the weather in Q4 2011 was generally more pleasant than Q4 of previous years. October brought many warm days for the time of year with the highest temperatures in the North and West. November was also generally mild across the UK with the South East being particularly dry. The mild weather continued into December, however, towards the end of the month we started to see more stormy weather and showers in the North.
- Visit admissions again increased in Q4, up by +12% year-on-year, the highest increase recorded this year. This has been driven by a 28% increase in December's year-on-year comparison.
- All geographical regions have seen an increase in Q4, this is most evident in the Midlands and East of England. Rural areas have seen a notable increase this quarter of +16%.
- The comparatively mild weather during the quarter appears to have driven the increase in visits. In addition, events and special exhibitions are also thought to have driven increased visitation for some attractions, highlighting the importance of these exhibitions / events in attracting new and existing audiences.
- In line with the increase in visitors to attractions, views of Q4 business performance have also improved.

Quarter 4 2011: Summary of findings (2)

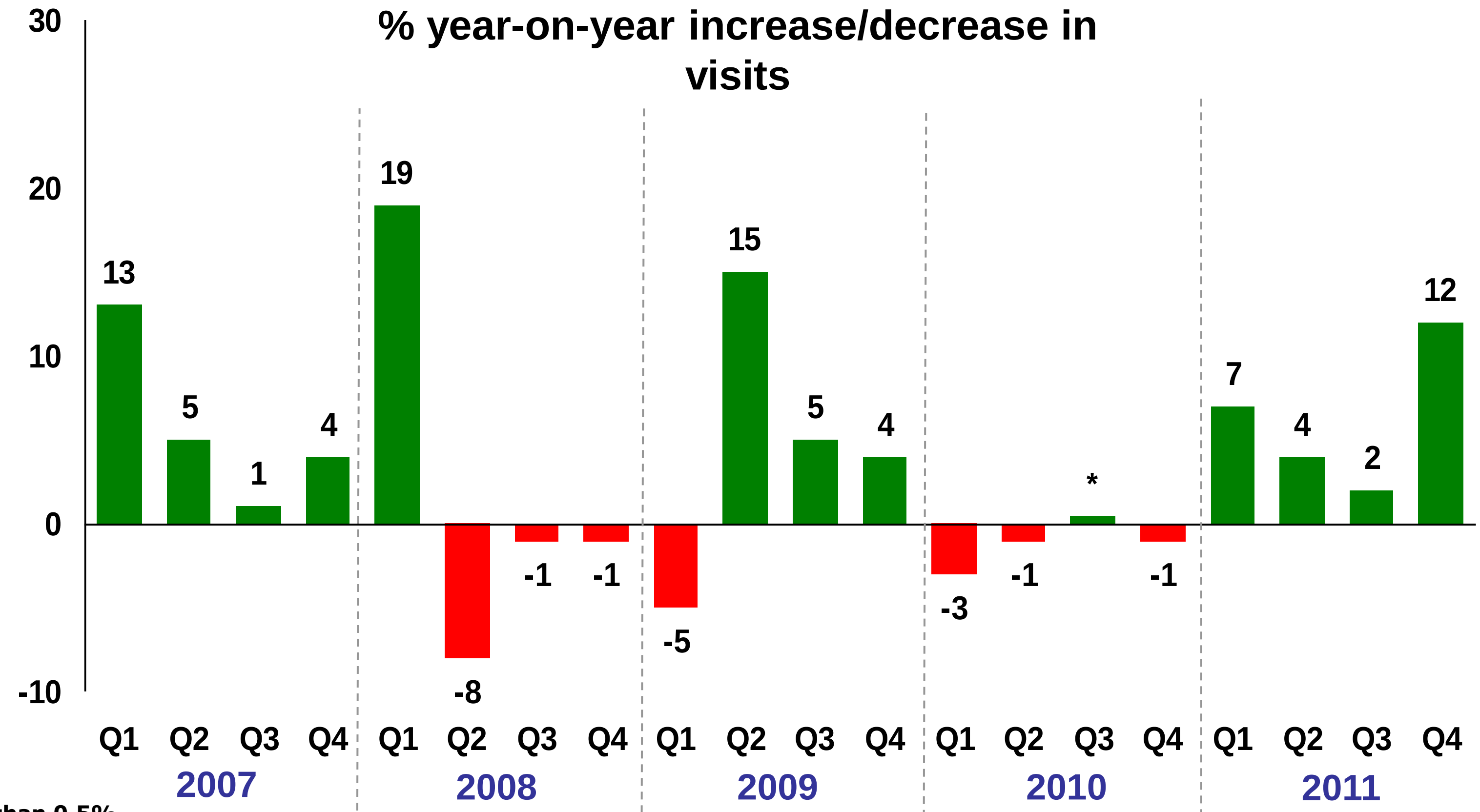
- Short term confidence for the forthcoming quarter in 2012 has shown some encouraging signs (perhaps influenced by the fine weather in late 2011). The longer term outlook has also improved from Q3 with significantly more attractions feeling optimistic about the next 12 months.
- The overall economic climate continues to be the major concern for attractions, with emphasis upon the decreasing spending power of the public, particularly in regards to discretionary spend items.
- Free and urban attractions continue to feel the most optimistic.
- Whilst secondary spend by visitors remains a concern, there are signs of improvement – over the year secondary spend has increased, albeit at a slower rate in Q4. Retail shows signs of improvement driven by low rather than high value items but the biggest increases in secondary spend are on special events / exhibitions, which are also key to driving visits.
- As the plans for the Diamond Jubilee unfold, optimism over the impact of the event remains strong, with 44% of attractions across the UK 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 the start of the year to 29% at Q4).

Main Findings:

Visit Trends

Year-on-Year Quarterly Visit Trends

Visits have continued to increase year-on-year during 2011 with Q4 providing the biggest rise (+12%).



*** = less than 0.5%**
Base: All Q4 2011 attractions (672)

Quarter 4 (Oct-Dec): Visit Trends 2010-2011

Visits increased year-on-year in each month of Q4 with a substantial increase in December of +28%. This, in part, could be due to a milder December than in 2010 which was recorded as the coldest December for over 100 years.

	% any decrease in visits	% Increase/Decrease in Visits	% any increase in visits
QUARTER 4 TOTAL	**28%**	**12**	**63%**
October	33%	7	57%
November	26%	9	50%
December	19%	28	54%

*** = less than 0.5%**
Base: All Q4 2011 attractions (672)

Quarter 4 (Oct-Dec): Visit Trends 2010-2011 – By Region

All regions have seen a marked improvement in visitor admissions over the quarter due to the improved weather this year. Some of the biggest increases were in December which was considerably milder than December 2010.

Region	Total Qtr Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
TOTAL ENGLAND (672)	**12**	**7**	**9**	**28**
North East (49)	10	*	9	35
North West (70)	6	2	11	9
Yorkshire & The Humber (67)	7	3	4	22
East Midlands (65)	18	14	4	56
West Midlands (55)	23	15	25	48
East of England (79)	17	8	16	40
London (38)	3	-3	1	15
South East (137)	19	17	14	33
South West (112)	9	4	10	24

*** = less than 0.5%**
Base: All Q4 2011 attractions (672)

Quarter 4 (Oct-Dec): Visit Trends 2010-2011 – By Attraction Category

Gardens outperform the market in Q4, benefiting from the milder conditions compared with the previous year. Apart from visitor/heritage centres, all attractions performed particularly well in December 2011 compared with December 2010.

Attraction Category	Total Qtr Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
TOTAL ENGLAND (672)	**12**	**7**	**9**	**28**
Historic Houses/Castles (260)	16	13	14	28
Other historic properties (65)	7	5	4	14
Museums/art galleries (139)	15	6	15	35
Gardens (50)	37	33	27	78
Visitor/heritage centres (19)*	-26	-33	-22	-15
Wildlife attractions/zoos (25)*	16	10	15	33
Others (114)	7	-1	1	30

*** = less than 0.5%**
*CAUTION: Low base size
Base: All Q4 2011 attractions (672)

Quarter 4 (Oct-Dec): Visit Trends 2010-2011 – By Other Segments

It continues to be the smaller attractions (with fewer than 20,000 visitors per annum) that report the smallest increases in visit admissions. Rural attractions benefited most from the milder autumn weather followed by urban locations. Little difference between paid and free sites in Q4 overall.

		Total Qtr Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
	TOTAL ENGLAND (672)	**12**	**7**	**9**	**28**
Visits per annum	Over 200,000 (56)	10	2	7	29
	100,001 – 200,000 (80)	13	11	8	26
	50,001 – 100,000 (99)	14	9	14	28
	20,001 – 50,000 (159)	19	14	19	35
	20,000 or less (273)	7	9	-1	16
Free/paid	Paid (535)	12	8	10	26
	Free (137)	11	2	8	33
Location	Coastal (73)	1	*	1	5
	Rural (387)	16	10	14	41
	Urban (212)	9	4	7	20

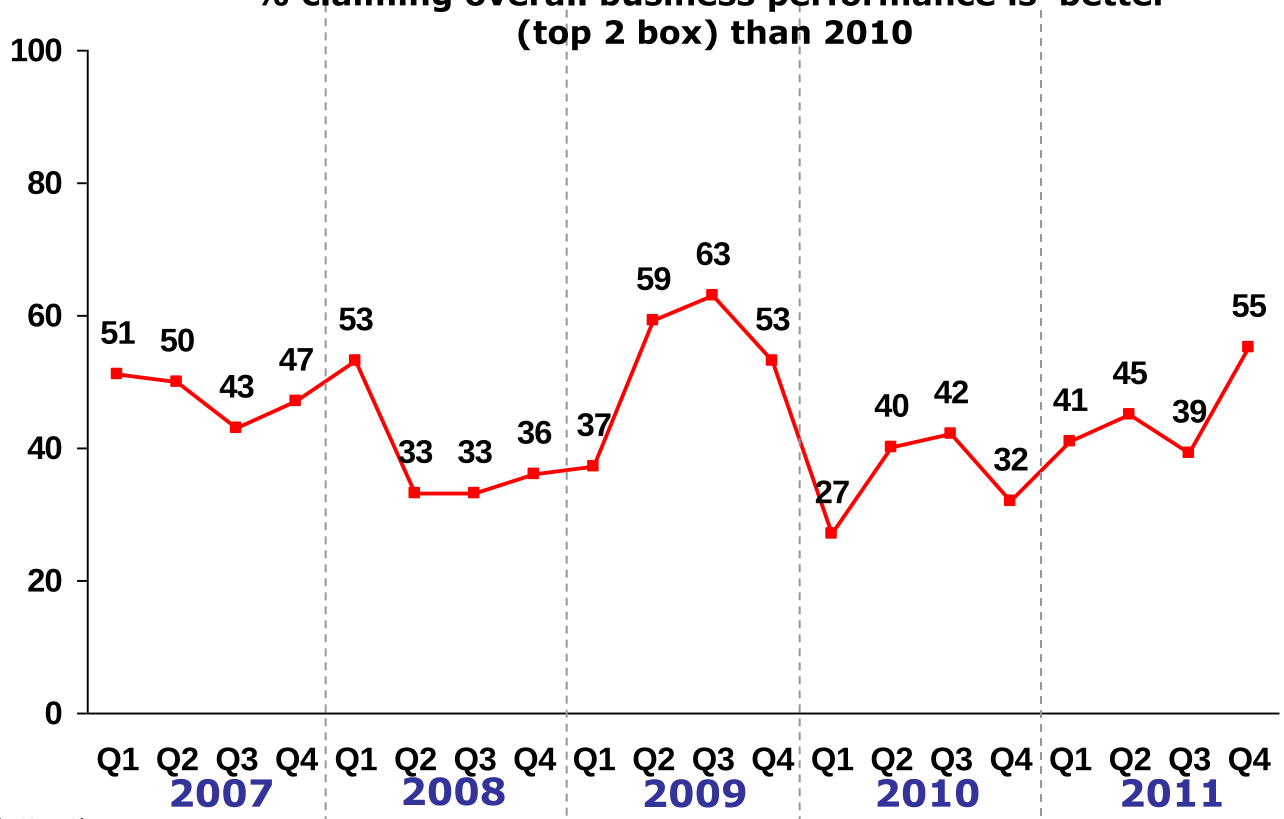
*** = less than 0.5%**
Base: All Q4 2011 attractions (672)

Main Findings:
Business performance and confidence

Overall Business Performance Trends

The increase in visitor admissions and the reduced proportion of those experiencing a decline in visits in Q4 has contributed to an extremely positive opinion of overall business performance in Q4. Over half (55%) felt their business performance was better than the previous year, the highest comparison since 2009.

% claiming overall business performance is 'better' (top 2 box) than 2010



Base: Non EH/NT attractions

Q. We would now like you to think about how the overall business performance of your attraction has changed in the <current quarter> period compared with <equivalent quarter> last year. Would you say that your overall business performance in the <current quarter> period was….?

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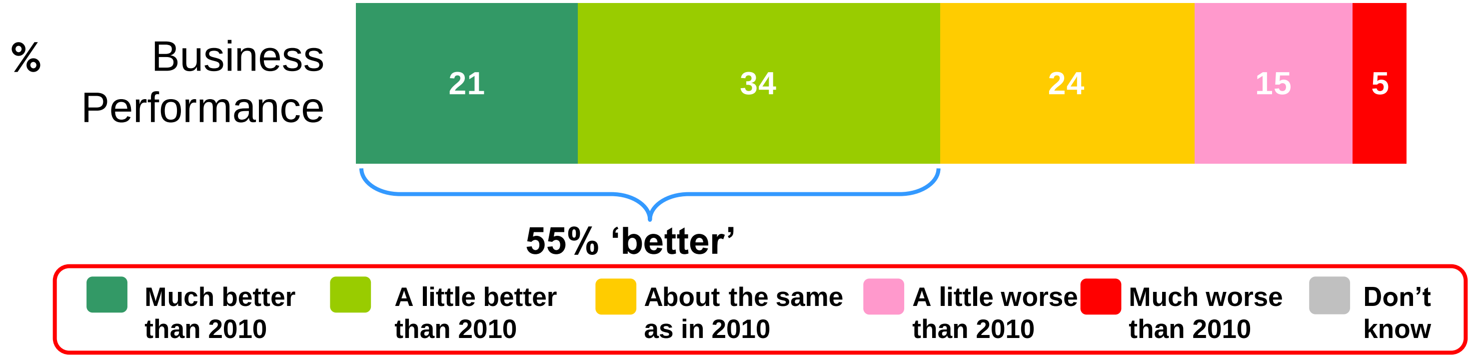
Quarter 4 (Oct-Dec): Overall Business Performance

In Q4 significantly higher proportions of attractions feeling that their business performance was 'better' than 'worse' compared to the equivalent period in 2010. North East, Yorkshire and the Humber and East Midlands were most likely to feel that their performance had improved. Wildlife attractions were the most likely to feel that their performance had improved, supported by a consistently strong increase in visits through Q4. The business performance of urban attractions was, once again, also notably more positive.



	% Better than 2010
North East	68
Yorkshire and the Humber	63
East Midlands	62
Free admission	58

	% Better than 2010
Urban	61
Coastal	55
Rural	52
Wildlife Attractions / zoos	71

Base: All Q4 2011 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 October to December 2011 period compared with October to December 2010. Would you say that your overall business performance in the October to December 2011 period was….?

Quarter 4 (Oct-Dec): Reasons for Business Performance – Positives

The weather is rated the most influential reason for the improvements in Business Performance with much warmer weather throughout the quarter. As Q3, special exhibitions / events are still a major influence on visitor numbers.

	Quarter 4 2011 (%)	
	Any Reason	Most Influential
The weather	49	29
More/better publicity/PR	35	5
More/better special exhibitions/events	33	17
More domestic holidaymakers in the area	26	9
More local people taking day trips	23	6
Other improvements/investments made to attraction	21	5
New attraction feature(s)	18	6
Improved/more spend on marketing and promotion	18	3
More overseas visitors to the area	10	3
Changed/cheaper pricing/more deals/discounts	8	3

Base: All Q4 2011 non EH/NT attractions stating business performance was better (203)

Q. You said earlier that your overall business performance in October to December 2011 was better than in 2010? Which of these describes why your performance was better?

Quarter 4 (Oct-Dec): Reasons for Business Performance – Negatives

Concerns about the economic climate continue to be the main reason for a worse business performance.

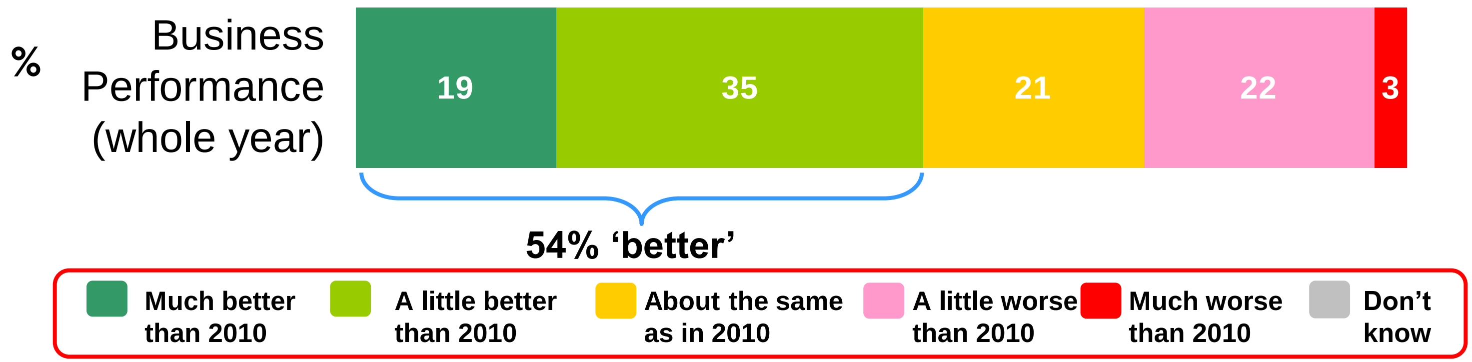
	Quarter 4 2011 (%)	
	Any Reason	Most Influential
Economic climate getting worse	58	41
Fewer domestic holidaymakers in the area	37	15
Fewer local people taking day trips	28	5
The weather	26	6
Fewer overseas visitors to the area	16	1
Fewer/not as good exhibitions/events	15	3
Nothing new/no improvements/investments to attraction	13	3
Increased prices	13	4
Less/not as good publicity/PR	11	0
Less effective/reduced spend on marketing/promotion	8	0
Increased competition in area	6	0

Base: All Q4 2011 non EH/NT attractions stating business performance was worse (72)

Q. You said earlier that your overall business performance in October to December 2011 was worse than in 2010? Which of these describes why your performance was worse?

2011: Overall Business Performance

When comparing the whole of 2011 with the whole of 2010, a significantly higher proportion of attractions felt that their performance for the year was 'better' in 2011. Less than a quarter felt their attractions performance was 'worse'. The Midlands and London were most likely to feel that their performance had improved.



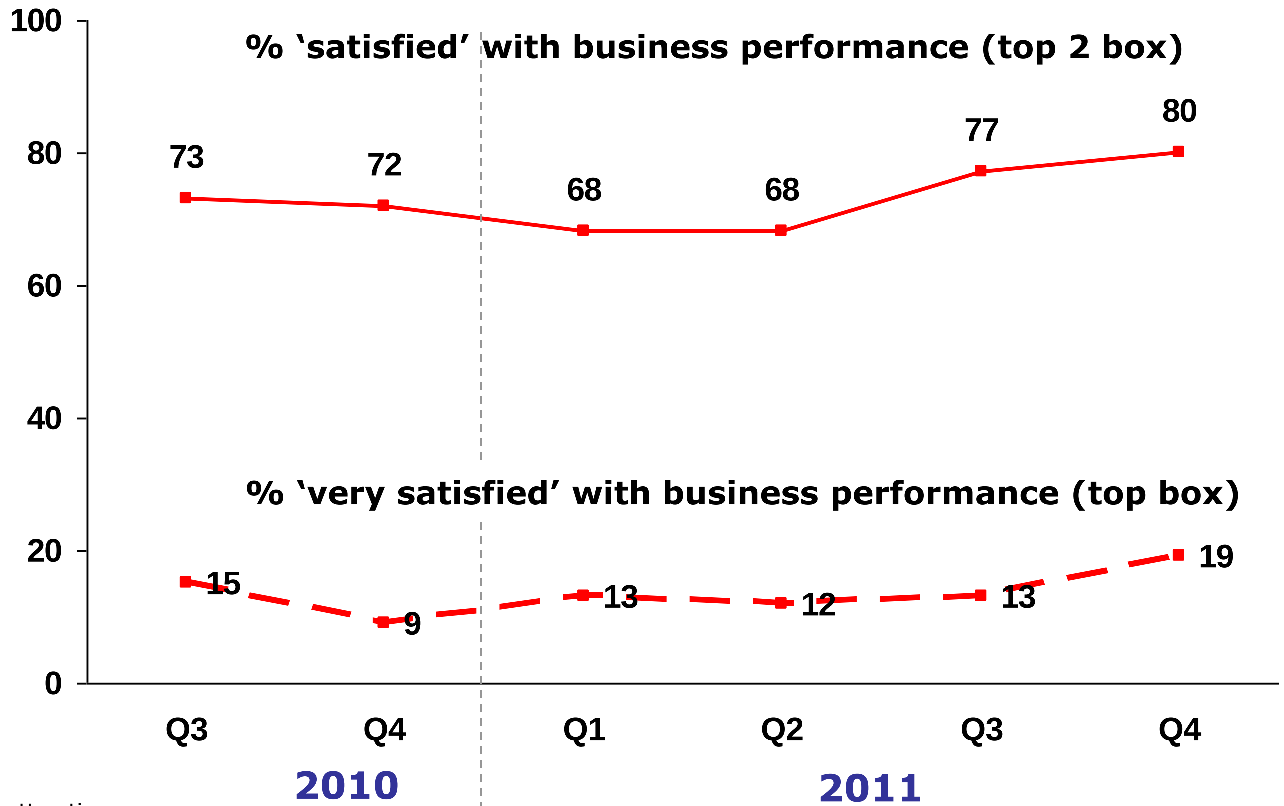
	% Better than 2010
East Midlands	67
West Midlands	65
London*	62
Free admission	60

	% Better than 2010
Urban	56
Coastal	62
Rural	50
Wildlife Attractions*	62
Gardens*	69

Base: All Q4 2011 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 whole of 2011 compared with the whole of 2010. Would you say that your overall business performance in 2011 was….?

Overall Satisfaction with Business Performance Trends

Reflecting the positive performance among the majority of attractions in Q4, satisfaction has peaked this quarter. Although the majority of attractions remain 'quite satisfied' rather than 'very satisfied'.

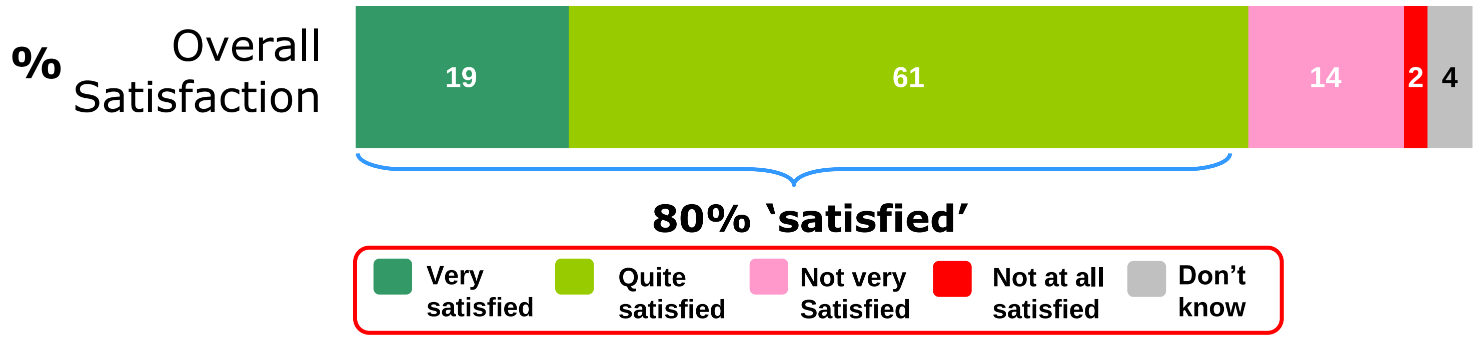


Base: Non EH/NT attractions

Q. Overall, how satisfied have you been with the performance of your business this quarter?

Quarter 4 (Oct-Dec): Overall Satisfaction with Business Performance

Attractions in Yorkshire and the Humber and the North East are most likely to feel satisfied with their business performance, along with free and urban attractions.



	% Satisfied
Free	86
Paid	77
Urban	83
Rural	79
Coastal	77

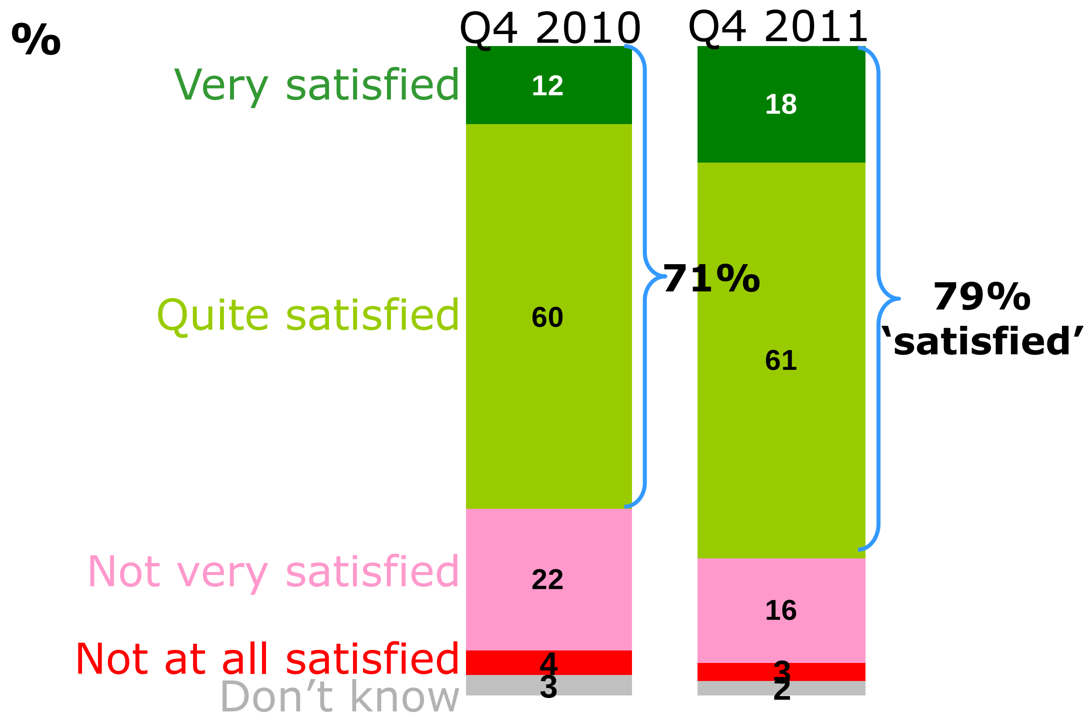
	% Satisfied
North East	93
Yorkshire and the Humber	86

Base: All Q4 2011 non EH/NT attractions (365)
*CAUTION: Low base size
Q. Overall, how satisfied have you been with the performance of your business this quarter (October – December period)?

Overall Satisfaction with Business Performance Trends (whole year performance)

Overall satisfaction with 2011 was higher than overall satisfaction with 2010 (+6% 'very satisfied'). Higher satisfaction among attractions in the North and Yorkshire and free and rural attractions in 2011.

Satisfaction with whole year



Q4 2011	% Satisfied
Free	83
Paid	77
Urban	77
Rural	81
Coastal	73
North East	86
Yorkshire & The Humber	86
North West	83

Base: Non EH/NT attractions
Q8b. Overall, how satisfied have you been with the performance of your business this year (the whole of 2011)?

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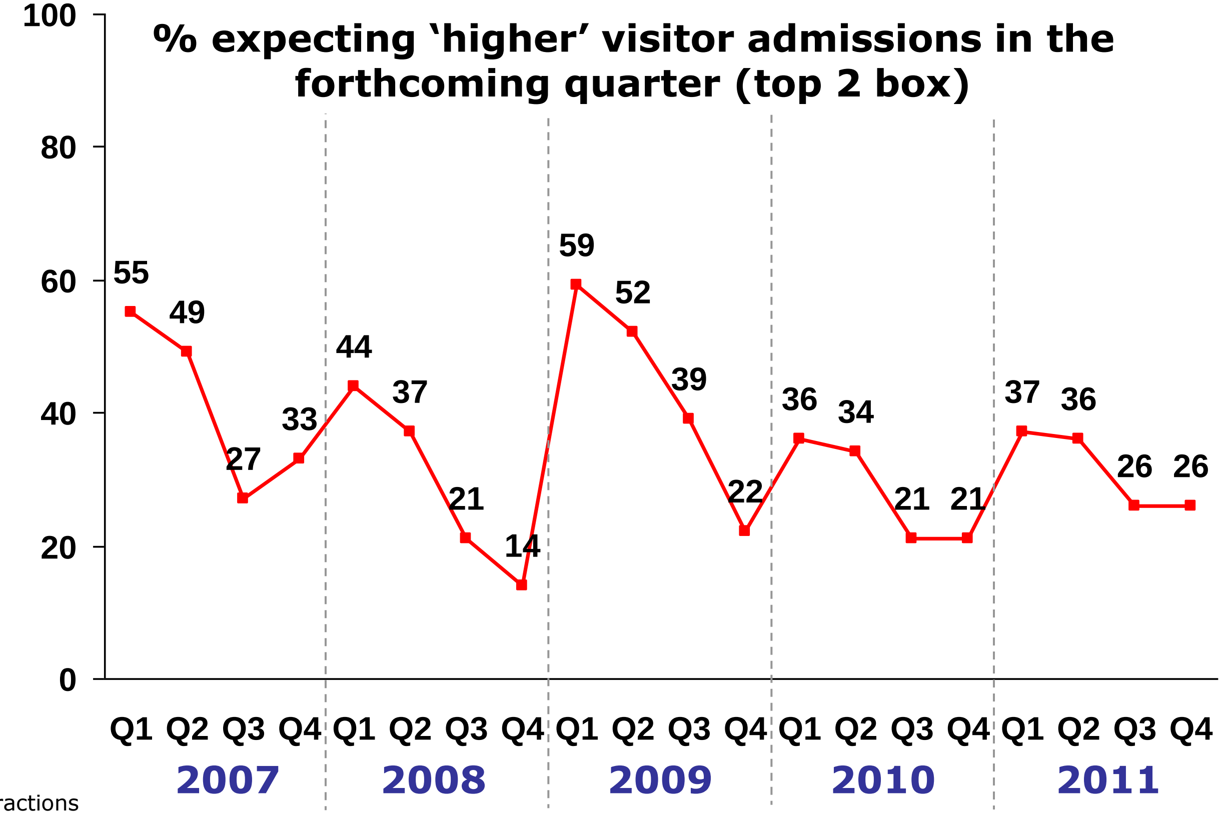
Visit Expectations Trends

Overall, attractions tend to be more optimistic about their performance at the start of the year with expectations diminishing as the year progresses. The first half of 2011 saw comparable expectations with the same time the previous year, but the expectations for the start of 2012 have become more positive – higher than they were when leading into 2011. Indeed expectations in Q4 2011 are the highest for this quarter of the year since 2007.



Base: Non EH/NT attractions

Q. Thinking about the <next quarter> period, do you expect visitor numbers (paid and free) compared with <equivalent quarter last year> to be….?

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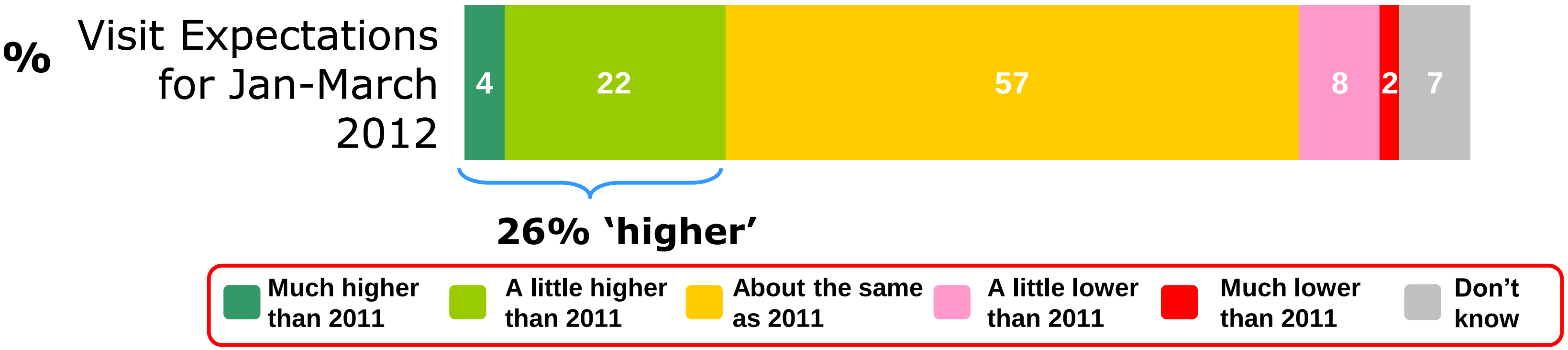
Quarter 4 (Oct-Dec): Visit Expectations for Jan-March 2012

Proportions expecting visits to increase is much higher than those expecting a decrease. Most noteworthy in Q4 is the significant decrease in the proportion expecting visitor numbers to be lower (26% in Q3, 10% in Q4). The majority (57%) expect visitor admissions to remain at current levels (42% in Q3).



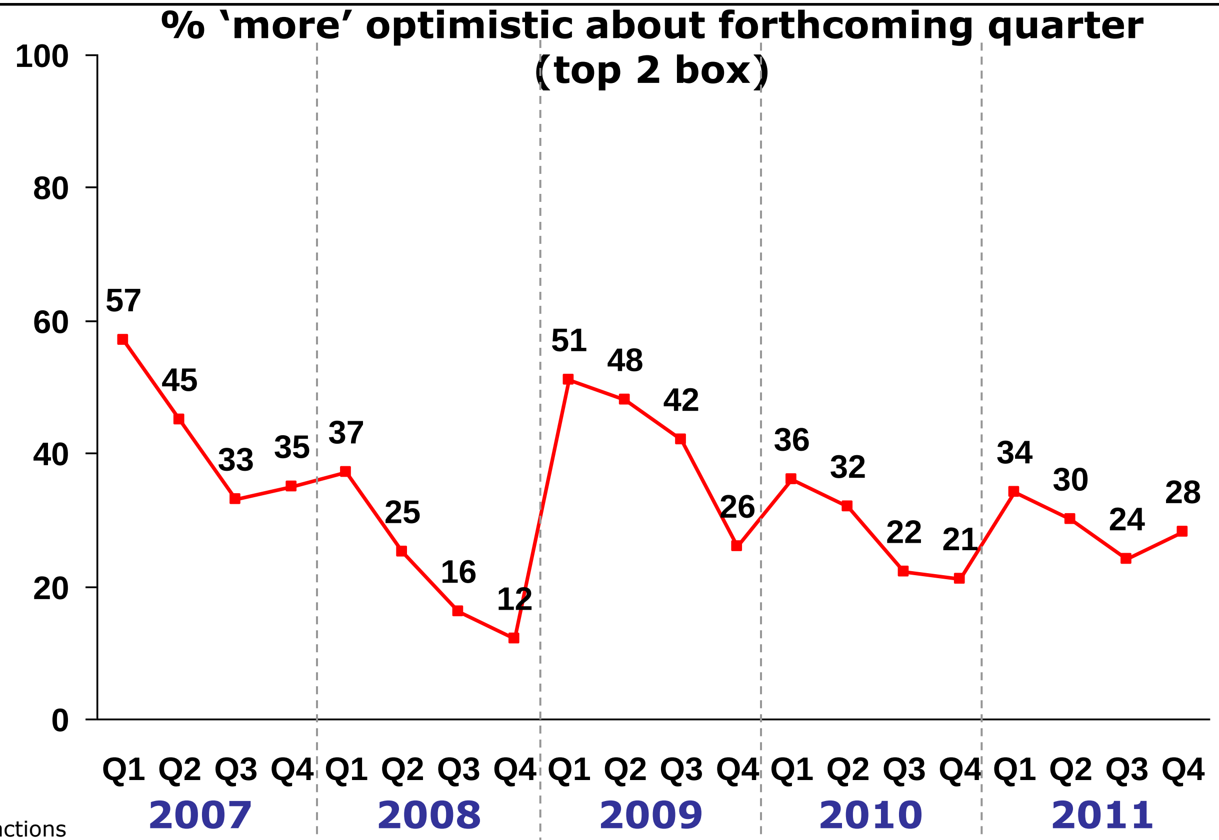
	% Higher than 2011
London*	48
North East	36
East Midlands	33

	% Higher than 2011
Free	37
Paid	20
Urban	37
Coastal	20
Rural	19

Base: All Q4 2011 non EH/NT attractions (365)
*CAUTION: Low base size
Q. Thinking about the January to March 2012 period, do you expect visitor numbers (paid and free) compared with January to March 2011 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. Perhaps driven by the positive results achieved in Q4 however, attractions are more optimistic about the start of 2012 than they were about the current quarter. Indeed optimism is at its highest for the time of year since 2007.

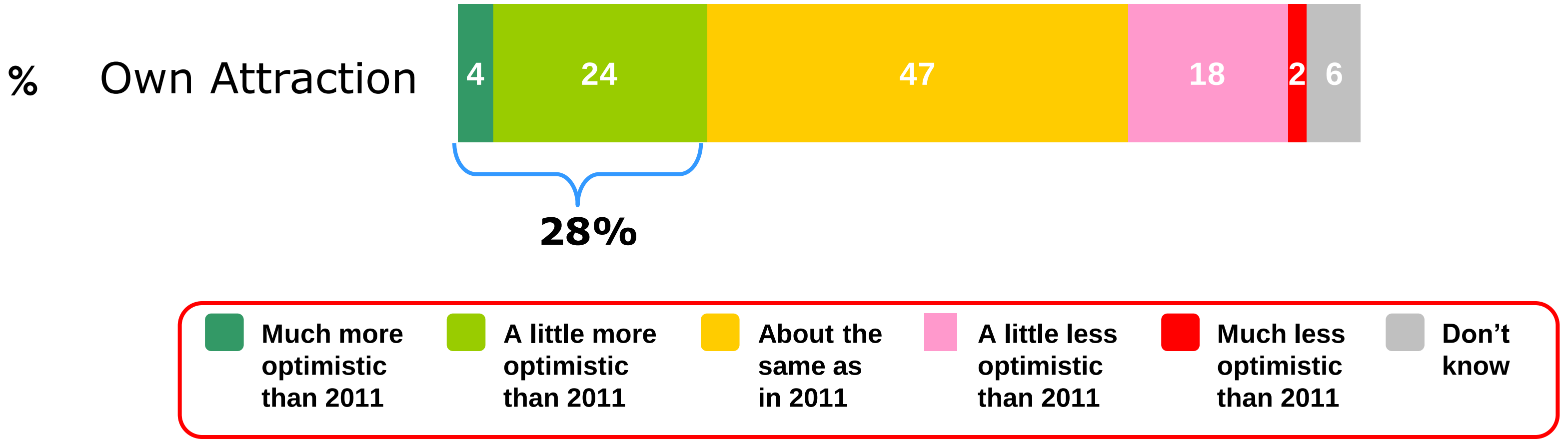


Base: Non EH/NT attractions

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 <next quarter> period?

Quarter 4 (Oct-Dec): Business Confidence for Jan-March 2012

As with other measures, the proportions of attractions feeling more optimistic is more than those feeling less optimistic. The proportion of those who are ‘much less’ optimistic has decreased in Q4 to 2% (11% in Q3).



Base: All Q4 2011 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 January to March 2012 period?

Quarter 4 (Oct-Dec): Business Confidence for Jan-Mar 2012 (Own Attraction) – by Region

The North East and East Midlands are the most optimistic about the start of 2012. However, this is trumped by London attractions who are perhaps hoping to benefit from the forthcoming Queen's Jubilee. Conversely, attractions in the South West are most likely to feel less optimistic.

Region	% more optimistic than 2011	% less optimistic than 2011
TOTAL ENGLAND (365)	**28**	**19**
North East (28)*	36	18
North West (46)	26	24
Yorkshire & The Humber (43)	28	12
East Midlands (42)	36	19
West Midlands (26)*	27	27
East (47)	19	11
London (21)*	57	10
South East (74)	19	26
South West (38)	24	29

Base: All Q4 2011 non EH/NT attractions (365)

*Caution low base size

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 January to March 2012 period?

Quarter 4 (Oct-Dec): Business Confidence for Jan-Mar 2012 (Own Attraction) – by Other Segments

The larger attractions are more optimistic about Jan-March 2012 than the smaller attractions. Free, urban sites are the most optimistic about their prospects for the beginning of 2012.

		% more optimistic than 2011	% less optimistic than 2011
	TOTAL ENGLAND (365)	**28**	**19**
Visits per annum	Over 200,000 (46)	42	15
	100,001 – 200,000 (35)	34	14
	50,001 – 100,000 (39)	29	12
	20,001 – 50,000 (81)	31	30
	20,000 or less (159)	20	18
Free / paid	Paid (245)	23	25
	Free (120)	36	8
Location	Coastal (40)	23	19
	Rural (189)	22	25
	Urban (136)	37	11

Base: All Q4 2011 non EH/NT attractions (365)

*Caution low base size

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 January to March 2012 period?

Quarter 4 (Oct-Dec): Business Confidence for Jan-Mar 2012 (Own Attraction) –by Attraction Category

After a disappointing performance during Q4 Visitor/heritage centres are feeling the most confident about the Jan-March period. Gardens and Historic Houses remain optimistic in their outlook for next year.

Attraction Category	% more optimistic than 2011	% less optimistic than 2011
TOTAL ENGLAND (365)	**28**	**19**
Historic Houses/Castles (53)	30	23
Other historic property (16)*	18	7
Museums/art galleries (134)	28	14
Visitor/heritage centres (17)*	46	13
Wildlife attractions/zoos (22)*	12	17
Gardens (21)*	30	22
Others (102)	27	27

Base: All Q4 2011 non EH/NT attractions (365)
*Caution low base size
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 January to March 2012 period?

Quarter 4 (Oct-Dec): Reasons for Business Confidence Jan-Mar 2012 (Own Attraction) – Positives

Drivers of optimism for the forthcoming quarter in 2012 remain varied. The increase in visitor numbers is a key driver of optimism along with actions taken by the attraction themselves such as exhibitions, events and investment in the site itself.

	Quarter 4 (>2%)
New exhibitions/ additional attractions	6
More/new/ better events	5
Visitor number trends increased/hope it will continue	5
Refurbishments/improvements to site/investment	5
Good positive weather forecast/poor weather last year	4
Free/Cheaper ticket offers	3
Staffing levels better	3
Open all the time/ throughout the year/longer opening hours/7 days	2
Positive forward/ advanced bookings	2
New/more/better marketing	2
Increase in domestic holiday market/ short breaks	2

Base: All Q4 2011 non EH/NT attractions (365)
Q. Why do you feel this way about your attraction's business prospects for January to March 2012?

Verbatim – Positives

We ended 2010 with falling numbers so the outlook in early 2011 was not positive. We have ended 2011 very positively, made a number of changes and so are optimistic about the next quarter.

We are investing significant sums in providing an even better visitor experience.

New additions to the museum, more marketing has been done and more awareness of the museums whereabouts.

Programme of major, popular exhibitions.

Due to the new exhibitions that have been added visitor numbers are increasing in this site.

We are holding a few more events in this site to try and boost numbers of visitors.

Upcoming exhibitions.

We have invested in both staff and buildings which have created new and innovative, free attractions for local people to involve themselves in. We have also developed a new coffee shop and play zone area.

Better marketing practices in place, CRM working, website revamped, staff better prepared, new markets approached.

Due to our programme of exhibitions in the past year we have done well for visitors. This quarter is when our annual Open exhibition is on and we are hopeful that we can maintain numbers.

We have re structured the business and done a lot of marketing.

Quarter 4 (Oct-Dec): Reasons for Business Confidence Jan-Mar 2012 (Own Attraction) – Negatives

Continued concerns over the economy and lower spending power of the public.

	Quarter 4 (%)
Economic climate/ interest rates/ fuel prices	15
Reduction in visitor/ retail spend	4
Less spending power of the public	3
Nothing/ little has changed/ no reason to be different	3
Depends on the weather	3
Lack of/declining external investment/ funding/ grants	2
Increase in entry prices/ pricing issues	2
Visitor numbers lower this year/ trend is down	2
Not sure how credit crunch will affect us	2

Base: All Q4 2011 non EH/NT attractions (365)
Q. Why do you feel this way about your attraction's business prospects for January to March 2012?

Verbatim – Negatives

There is much more competition for press coverage in 2012 because of the Olympics.

We have started to charge for entry whereas the year before entry was free to everyone.

Our entry prices have been increased over 200%.

The economic situation and cost of fuel.

Due to 3 weeks closure over the Christmas and New Year Period for the first time I expect numbers to have dropped therefore income also will have dropped.

We have had our advertising budget cut yet again.

Simply the economic situation and the availability of competing attractions in the locality.

All indicators suggest that the decrease in visitor numbers is unlikely to change due to peoples perceived financial problems, resulting in less people willing to pay entrance fee.

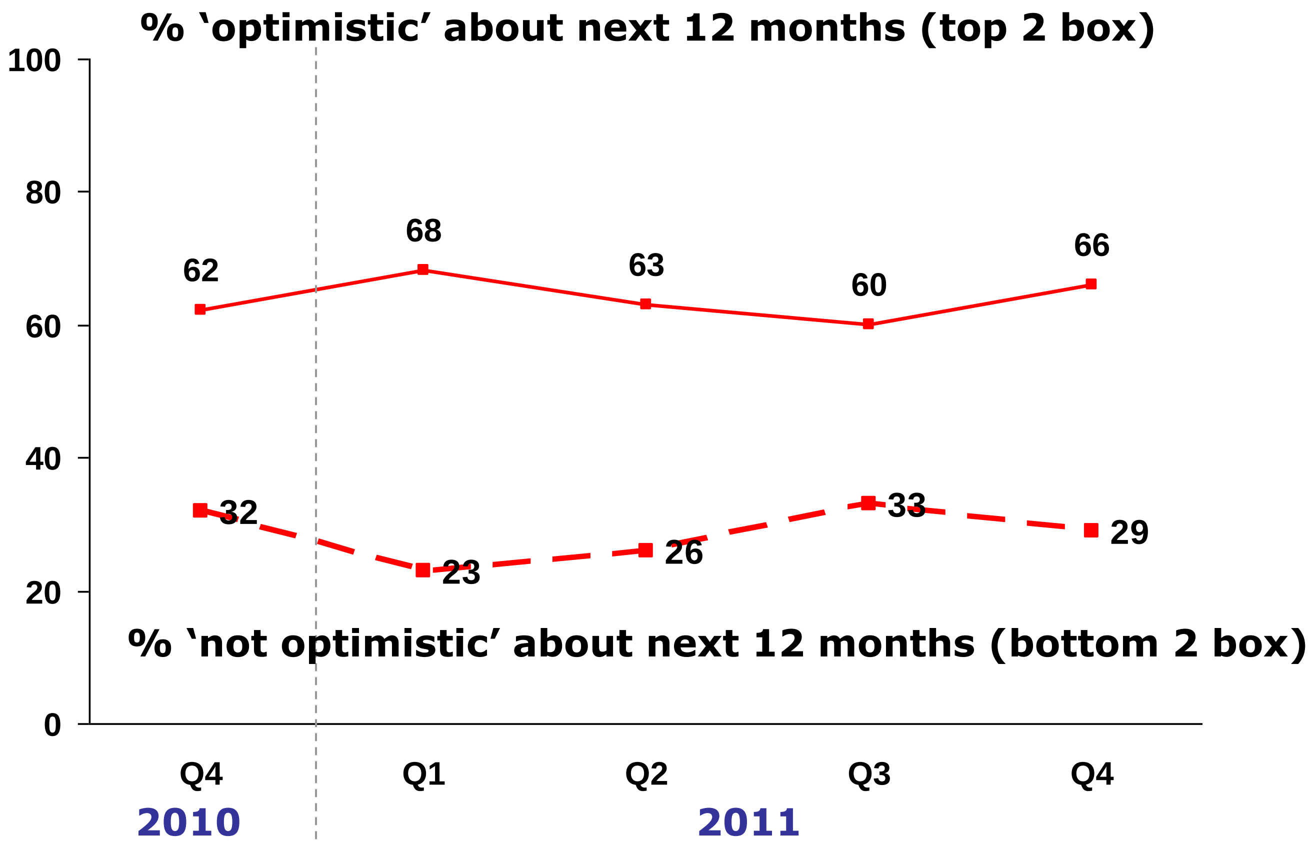
The effect of the economic slump on visit numbers and spend. Lack of funding for development.

Have tried lots of new things, but with little change in visitor numbers or increase in income. Have some investment to make and taking on new team members, but not sure where the increase will come from.

Potential customers will have less spare cash and will be looking for free attractions or discount offers however costs to run our attraction have increased.

Business Confidence for next 12 months Trends

Optimism for the next 12 months appears to be recovering slightly compared to previous waves this year. However there still remains a lot of uncertainty in the market about the impact of the events in 2012.



Base: Non EH/NT attractions Q. Which of these statements best describes how optimistic you feel about your attraction's business prospects for the next 12 months?

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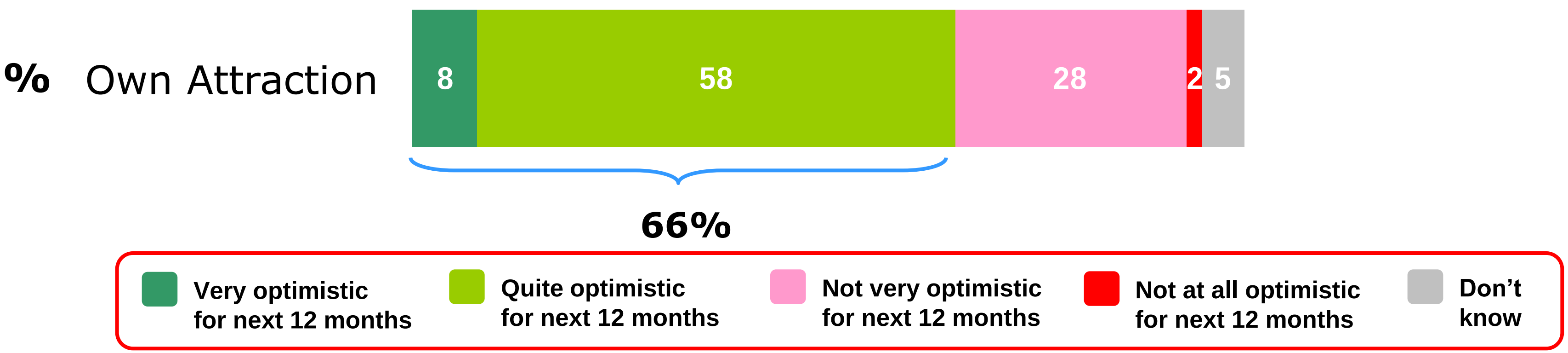
Quarter 4 (Oct-Dec): Business Confidence for next 12 months

The proportion feeling optimistic still comfortably outweighs the proportion feeling less optimistic.



Base: All Q4 2011 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 4 (Oct-Dec): 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. The smaller and paid for attractions have biggest concerns over the next 12 months.

		% optimistic	% not optimistic
	TOTAL ENGLAND (365)	**66**	**29**
Visits per annum	Over 200,000 (38)	78	17
	100,001 – 200,000 (35)	74	24
	50,001 – 100,000 (40)	69	29
	20,001 – 50,000 (88)	58	38
	20,000 or less (160)	63	30
Free / paid	Paid (245)	59	36
	Free (120)	78	16
Location	Coastal (40)	66	32
	Rural (189)	59	34
	Urban (136)	75	22

Base: All Q4 2011 non EH/NT attractions (365)
* Caution low base sizes
Q. Which of these statements best describes how optimistic you feel about your attraction's business prospects for the next 12 months?

Quarter 4 (Oct-Dec): Business Confidence for next 12 months (Own Attraction) – by Attraction Category

Museums and art galleries, historic properties and visitor / heritage centres are most optimistic about the next 12 months.

Attraction Category	% optimistic	% not optimistic
TOTAL ENGLAND (365)	**66**	**29**
Historic Houses/Castles (53)	55	33
Other historic property (16)*	75	25
Museums/art galleries (134)	71	26
Visitor/heritage centres (17)*	70	18
Wildlife attractions/zoos (22)*	63	37
Gardens (21)*	62	34
Others (102)	63	32

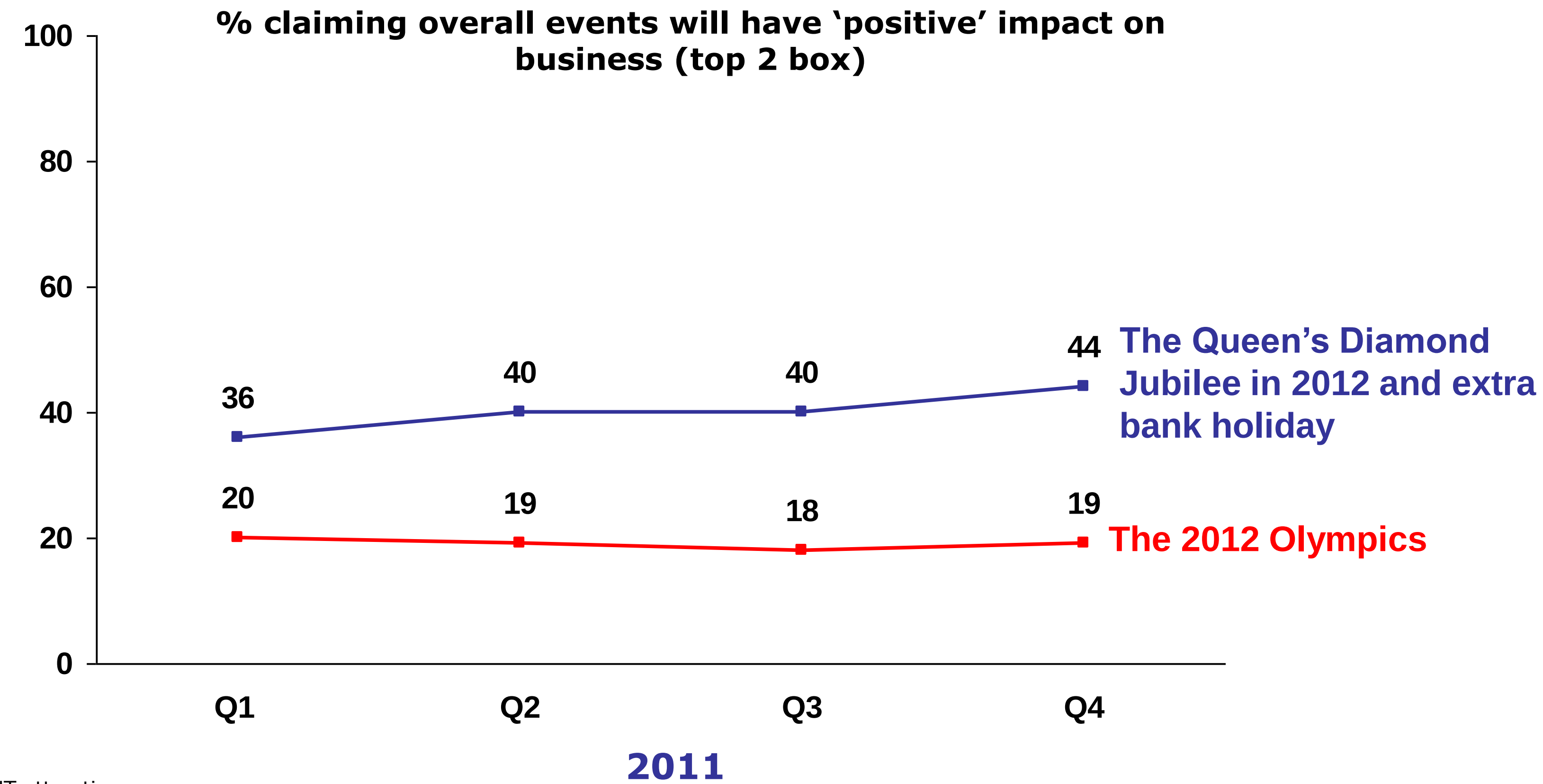
Base: All Q4 2011 non EH/NT attractions (365)
* Caution low base sizes
Q. Which of these statements best describes how optimistic you feel about your attraction's business prospects for the next 12 months?

Main Findings:

Hot Topics

Hot Topic Question: Impact of future public events trends

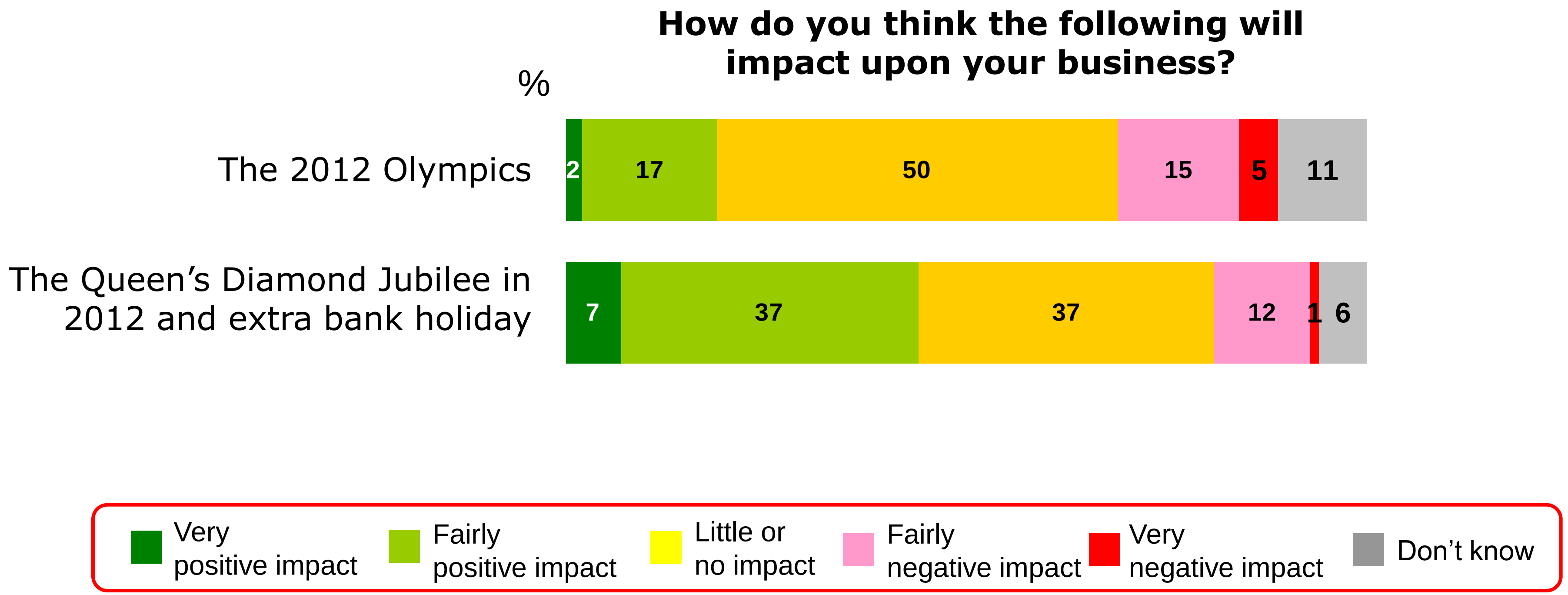
As plans start to unfold for the Queen's Diamond Jubilee, there is an increase in optimism with 44% feeling that it will have a positive impact on business. Uncertainty continues in regards to the impact of the Olympics with less than 1 in 5 (19%) stating it will have a positive impact on business.



Base: Non EH/NT attractions
Q. How do you think the following will impact on your business?

Quarter 4 (Oct-Dec): Hot Topic Question: Impact of future public events

With the Olympics fast approaching opinion continues to be polarised and 11% remain uncertain about the impact of the event on their business. Optimism continues to be much more widespread for the impact of the Queen's Diamond Jubilee.



Base: All Q4 2011 non EH/NT attractions (365)
Q. How do you think the following will impact on your business?

Hot Topic Question: Impact of future public events (% positive impact in Q4 2011)

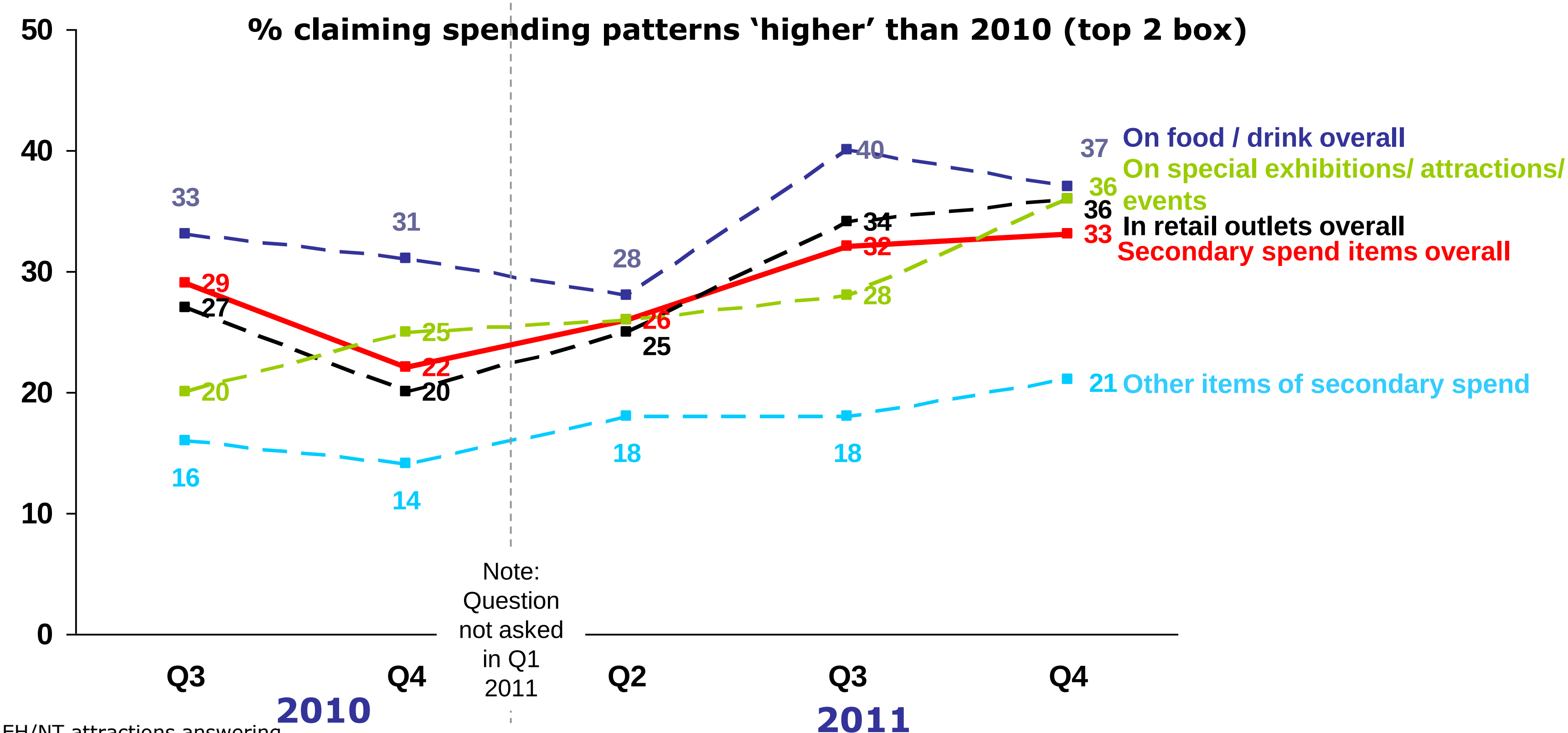
London continues to be slightly more optimistic about the Olympics than the rest of the country with 29% expecting a positive impact. However, this has decreased significantly throughout the year (down from 60% at Q1, 48% at Q2, 44% at Q3). Positive feeling about the Diamond Jubilee is much more widespread 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 (%)
TOTAL ENGLAND (365)	**19**	**44**
North East (28)*	4	61
North West (46)	22	48
Yorkshire & The Humber (43)	14	35
East Midlands (42)	10	50
West Midlands (26)*	23	38
East (47)	23	55
London (21)*	29	38
South East (74)	23	38
South West (38)	21	37

Base: All Q4 2011 non EH/NT attractions (365)
* Caution low base sizes
Q. How do you think the following will impact on your business?

Hot Topic Question: Secondary Spend Trends

Despite concerns over public spending power, the trend for secondary spend continues to be positive albeit a minimal increase in Q4. 33% now feel that secondary spend is higher than at the same time last year compared with 22% 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.



Base: Non EH/NT attractions answering

Q. Compared with the <previous year> quarter, what changes have you seen in the spending patterns at your attraction in the <current quarter> period? Is the spending per visitor...?

bdrc continental

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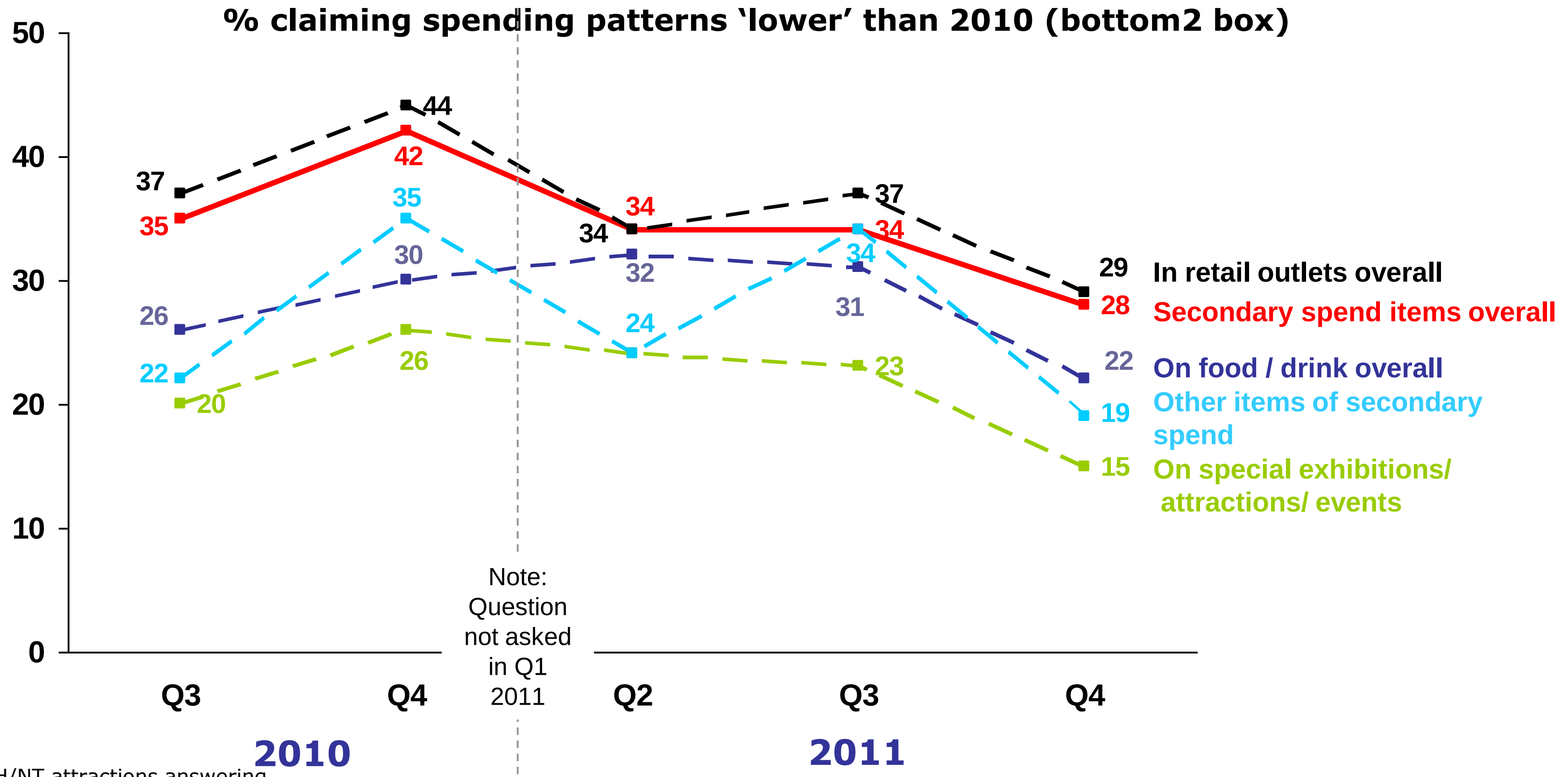
Hot Topic Question: Secondary Spend Trends

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

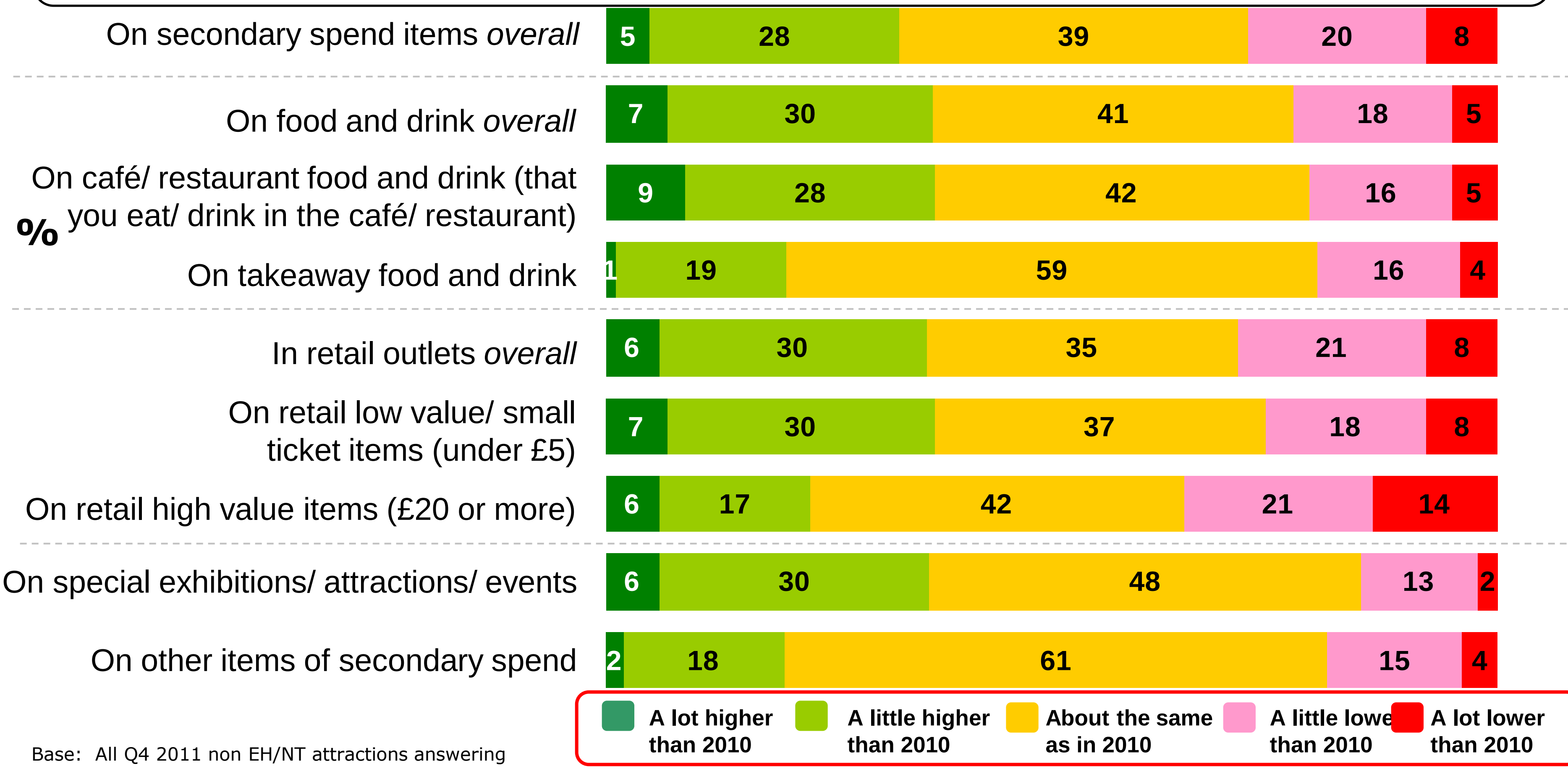


Base: Non EH/NT attractions answering

Q. Compared with the <previous year> quarter, what changes have you seen in the spending patterns at your attraction in the <current quarter> period? Is the spending per visitor…?

Quarter 4 (Oct-Dec): 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. Spend on special exhibitions is also substantially improved supported by this being an influential reason for improved business performance.

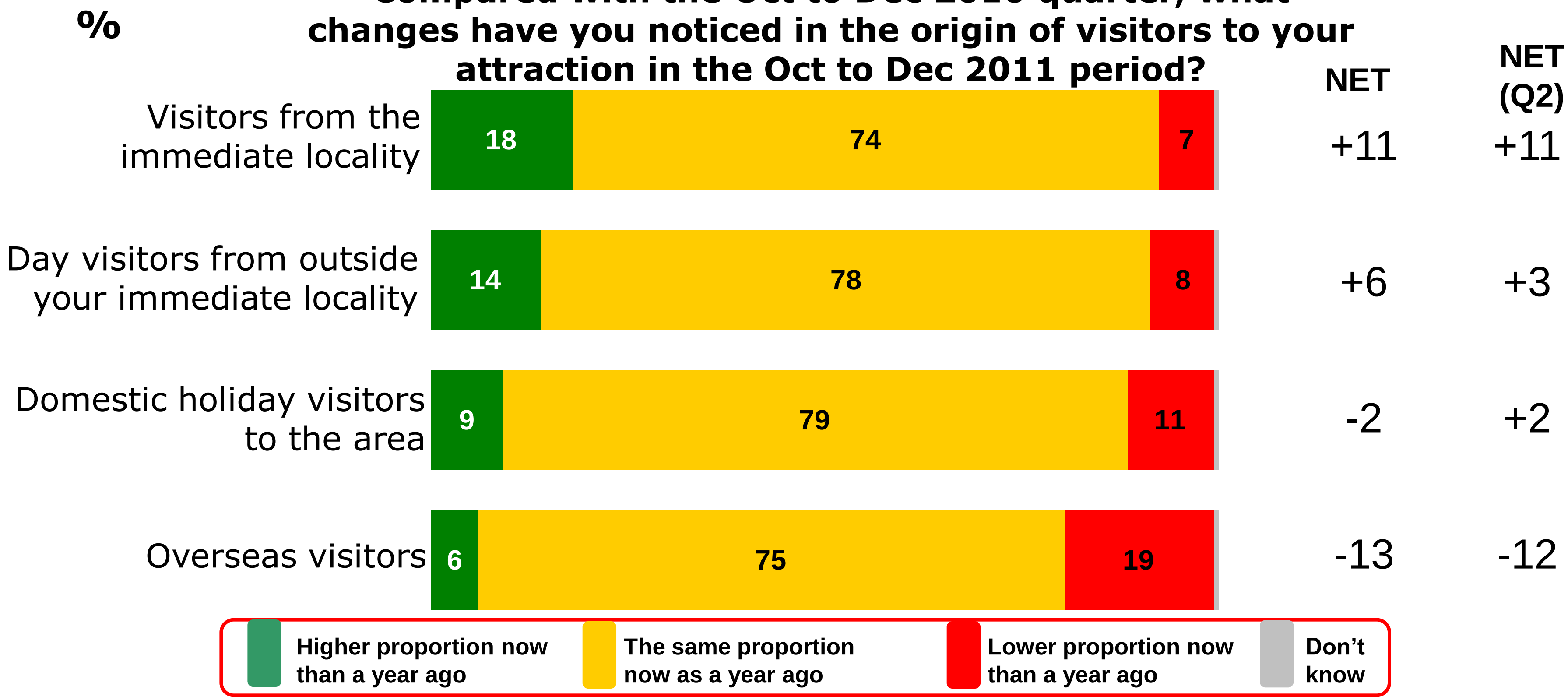


Base: All Q4 2011 non EH/NT attractions answering

Quarter 4 (Oct-Dec): Hot Topic Question: Origin of Visitors

The positive impact of visitors from the immediate local area continues to be felt strongly in Q4 2011, more so than day and stay visitors from further afield. The proportion of visitors from overseas continues to decline.

Compared with the Oct to Dec 2010 quarter, what changes have you noticed in the origin of visitors to your attraction in the Oct to Dec 2011 period?



Base: All Q4 2011 non EH/NT attractions (365)
Compared with the October to December 2010 quarter, what changes have you noticed in the origin of visitors to your attraction in the October to December 2011 period? For each of the following types of visitor, do you think you now attract a higher or lower proportion from this group compared with a year ago, or is it about the same?