VisitEngland

Visitor Attraction Trends in England 2012

Full Report

VisitEngland

Acknowledgements

VisitEngland would like to thank all representatives and operators in the attraction sector who provided information for the national survey on which this report is based. For a number of attractions, data has been included with kind permission of ALVA (Association of Leading Visitor Attractions), English Heritage, The National Trust, Birmingham Museums Trust, Canal & River Trust, Go Ape, Liverpool Museums as well as several Destination Management Organisations. Where relevant this has been referenced in the report.

VisitEngland is grateful to English Heritage for their financial support for the 2012 survey.

August 2013

ENGLISH HERITAGE

Introduction

This report presents the findings of the Survey of Visits to Visitor Attractions undertaken in England by VisitEngland. The report provides a comprehensive England-wide analysis of trends plus visits data for individual attractions.

Objectives

To monitor trends in the visitor attraction sector in England and to improve understanding of the dynamics of the sector. Findings contribute to estimates of the economic impact of tourism and inform development and planning work. Results allow operators to benchmark their operation within their category, within their region and across the sector as a whole.

Survey Method

Attractions have the option of either online or postal survey completion.

All attractions for whom email contacts are held are sent an email invitation with a link to their attraction's online questionnaire. Attractions not responding are subsequently sent a postal questionnaire alongside attractions with no or only generic email contacts.

A copy of the questionnaire is appended.

BDRC Continental holds the contract for the survey in England and is responsible for the preparation of this report.

It is important to highlight that major individual attractions can have a significant impact upon the proportion of visits within each region and attraction category. Their participation or non-participation in the survey year-on-year can result in significant fluctuations in the data within each region and attraction category.

Visitor Attraction Definition

"…an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc."

Sample and Response

Visit England has recently tightened its definition of attractions so undertook a major review of the list of attractions used for this year's survey.

For example, parish churches and small art galleries with a retail focus were removed from the attractions list.

This has removed a number of small sites previously classified as attractions, and we have therefore seen a slight shift in the attraction size profile of sites participating in the research this year.

Arts Council England no longer collates visitor numbers for attractions, so was unable to contribute to the survey this year.

5,195 English visitor attractions were invited to take part in the 2012 survey.

1,511 English visitor attractions provided visits figures for the year 2012.

- 988 completed online
- 235 completed by post
- 288 provided data through umbrella organisations

1,456 attractions provided admissions for both 2012 and 2011 and these attractions form the basis of this report's trend evaluation.

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Sample and Response

Response by attraction category

Category	Number of attractions that provided data
Country Parks	43
Farms	38
Gardens	85
Historic properties	440
Leisure / theme parks	25
Museums / art galleries	511
Steam / heritage railways	27
Visitor / heritage centres	78
Wildlife attractions / zoos	78
Workplaces	27
Places of worship	58
Other	101
Total	**1,511**

Response by attraction size

	Profile of attractions that provided data	
Category	2012	2011
10,000 or less	31%	37%
10,001 – 20,000	14%	14%
20,001 – 50,000	20%	18%
50,001 – 100,000	10%	11%
100,001 – 200,000	11%	8%
Over 200,000	14%	12%

Headlines (1)

There was continued instability in the UK economy in 2012, with Gross Domestic Product in decline for three quarters of 2012, and the Olympics also having an unsettling effect for some attractions.

The weather was characterised by a fairly warm, dry Spring followed by one of the wettest summers on record, with above average rainfall continuing for the rest of the year.

Overall there was a **-1% annual decline in total visits to attractions in 2012.**

Sectors with high numbers of outdoor attractions and paid attractions found 2012 particularly challenging, but only two sectors (museums & galleries and workplaces) were able to buck this trend and grow visitor numbers.

Free sites fared much better than paid, growing visitor numbers by +2% vs. a decline of -3%. The largest attractions (with 200,000 visitors) also managed to increase admissions (by +1%), helped by growth of the overseas market.

Adult entry charges to paid attractions increased by +4% in 2012, with child charges increasing by +3%. This helped to offset the impact of a drop in visitor numbers, enabling sites to grow **gross revenue by +1% overall.** However, the revenue increase was driven by just a quarter of attractions, and there were more sites reporting a decrease (36%) than an increase (27%) in revenue in 2012.

Over the past eight years, the proportion of attractions making additional marketing investments has been in gradual decline. There are now nearly as many attractions decreasing their marketing expenditure as there are increasing.

Headlines (2)

Two-thirds (67%) of attractions offered some form of digital communications in 2011: Facebook is popular (used by 55%), and Twitter has also taken off in the last year (now employed by 45% of sites).

A wide range of services are offered by attractions in 2012:

- 79% website
- 68% retail shop
- 57% public events
- 56% membership scheme
- 51% café/restaurant
- 44% temporary exhibitions
- 39% play area for children
- 38% venue hire
- 25% corporate events
- 25% online booking
- 18% costumed interpretation

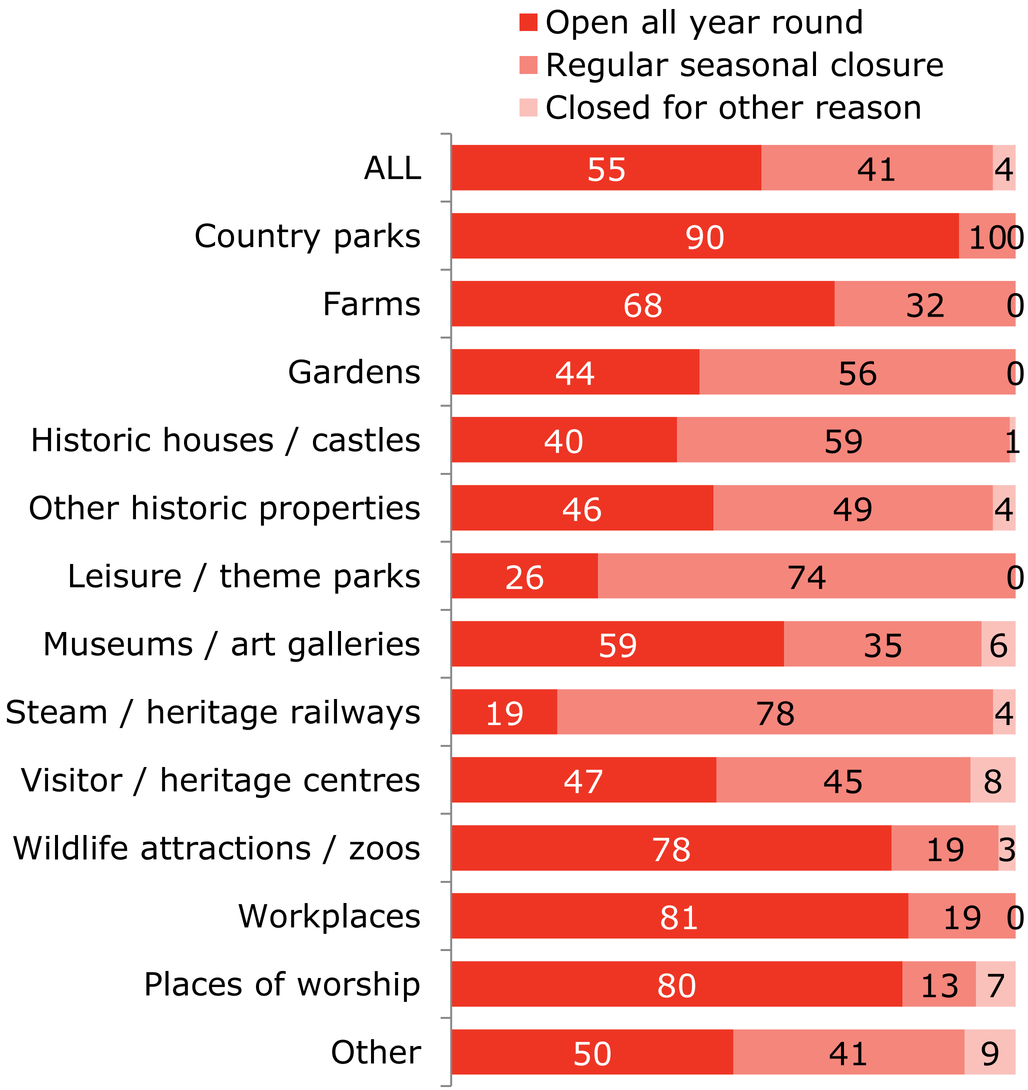
As predicted last year, 2012 has seen a continued increase in unpaid volunteers, with a quarter of sites now employing more volunteers than in 2011, rising to 30% amongst attractions with over 200,000 visitors a year.

2012 Weather Summary *(source: Met Office)*

The year 2012 began with a relatively dry January to March, but will be remembered as one of the wettest on record, with annual rainfall across England up by 32% compared with the average across 1981 to 2010. Sunshine in England was 3% below average, and mean temperatures broadly on a par at only -0.1ºC lower than average.

Winter 2011/12:	2012 started out relatively dry (14% below average), with below average rainfall in January and February and temperatures 0.8ºC up.
Spring 2012:	This pattern continued into the beginning of Spring, with an uncharacteristically warm, sunny and dry March (with rainfall 59% below average). In marked contrast, April was the wettest on record, with 232% of normal rainfall. May saw a return to a more stable weather pattern.
Summer 2012:	Frequent areas of low pressure over or near the UK resulted in an exceptionally wet summer across most of the country, especially during June and much of July. June was the wettest since 1766 and July had over 182% of normal rainfall. The summer was duller than usual, with 79% of normal sunshine for the UK overall.
Autumn 2012:	The wet weather continued across the whole of Autumn, and temperatures were down by 0.7ºC.

Attraction opening – by attraction category



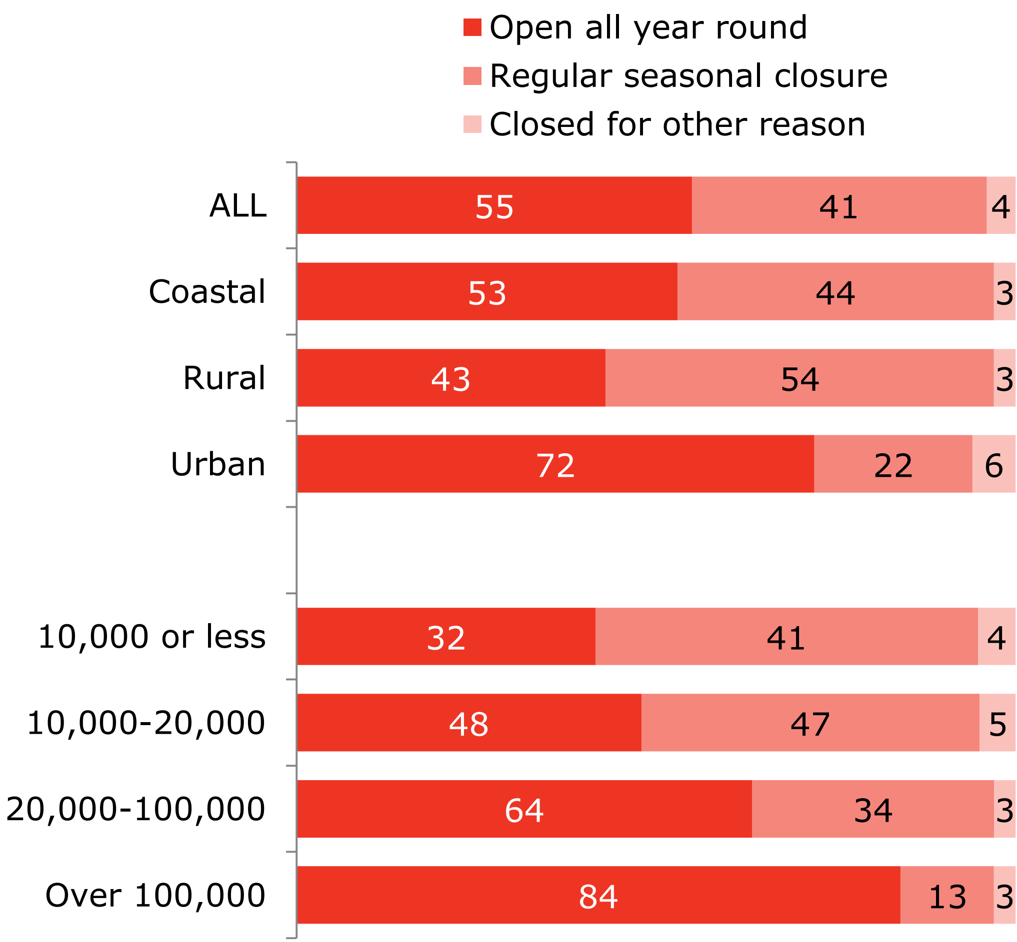
Little over half of attractions remain open all year round.

Seasonal closure is most common for steam/ heritage railways and leisure/ theme parks, which are largely reliant on holiday trade.

Country parks, workplaces, places of worship and wildlife attractions are the most likely to remain open year round.

Base: All attractions answering (1,313).

Attraction opening – by destination type & attraction size



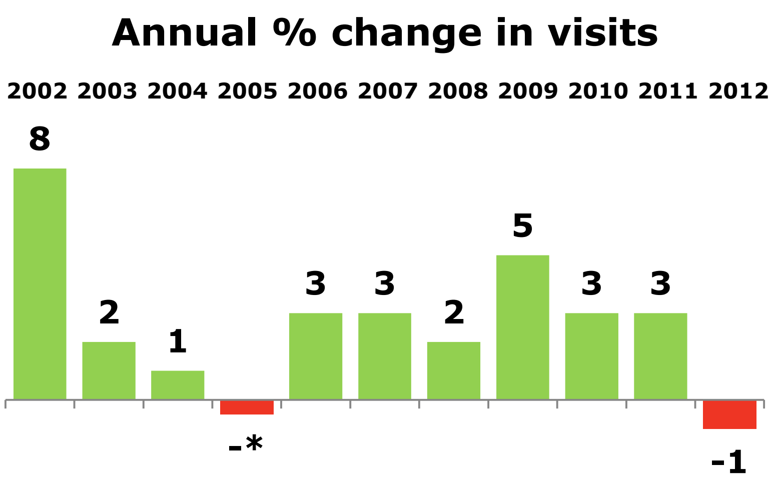
Larger attractions (100,000 visitors or more), which tend to be based in urban areas are more likely to stay open year round.

Less than a third of small attractions (10,000 visitors a year or less) remain open for the whole year.

Base: All attractions answering (1,313).

Visitor admission trends

Visitor admission trends



Attractions reported a **1% annual decrease** in total visits in 2012 (adults and children).

This was driven by attractions charging for admission, where there was a 3% decline in visits, contrasting to a 2% increase amongst sites with free entry.

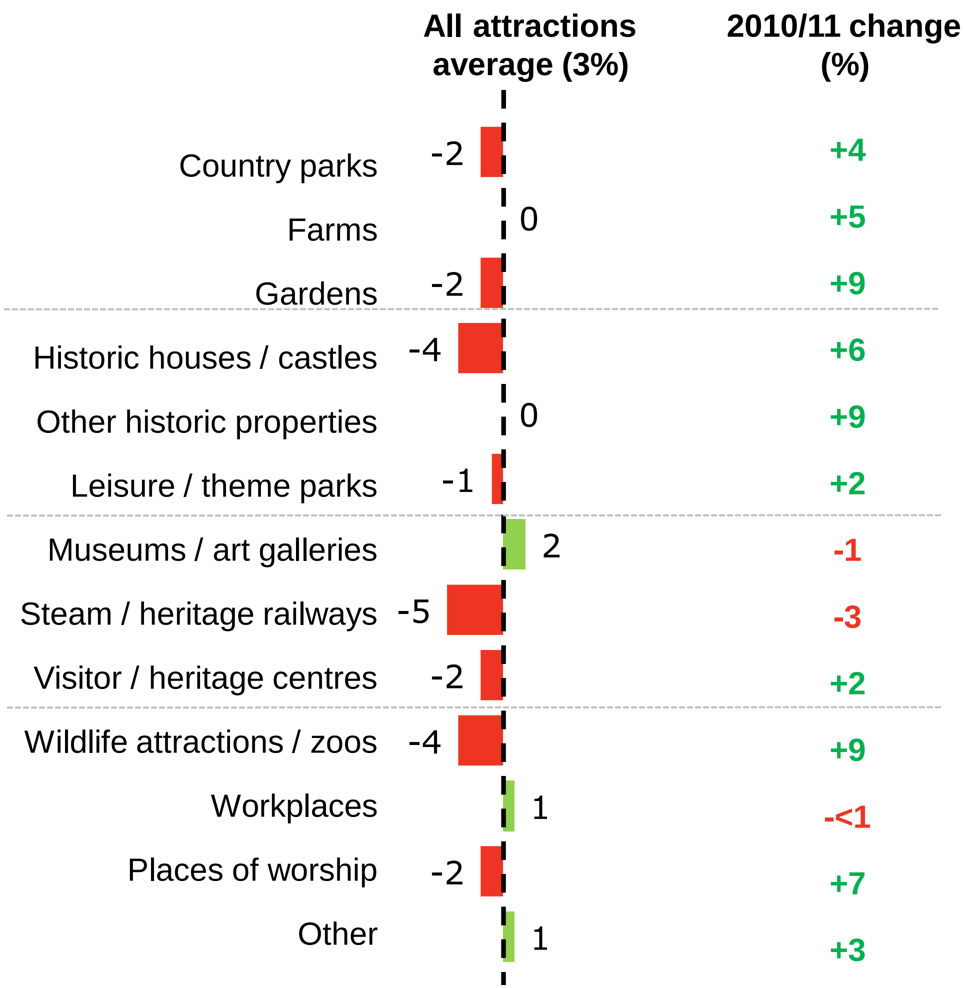
The overall decline was not associated with a reduction in the number of trips taken in England. There was actually an increase in the number of day visits in 2012 (+12%), the number of domestic holiday trips remained consistent with 2011, and there was a +1% uplift in holiday visits to England from abroad (*source: GBTS, Day Visits survey & IPS*).

However, the number of nights for English holidays reduced by -1% for domestic travellers and -2% for international visitors (*source: GBTS & IPS*).

The Olympics and Paralympics may have had an unsettling effect on visits to attractions, with many attractions reporting a decline in visitor numbers during the summer months (*source:* Tourism Business Monitor).

Base: All attractions providing visits data for current and previous year (1,456 in 2012).

Visitor admission trends 2012 – by attraction category



2012 was a difficult year for attractions across the board, with fortunes reversed for most sectors.

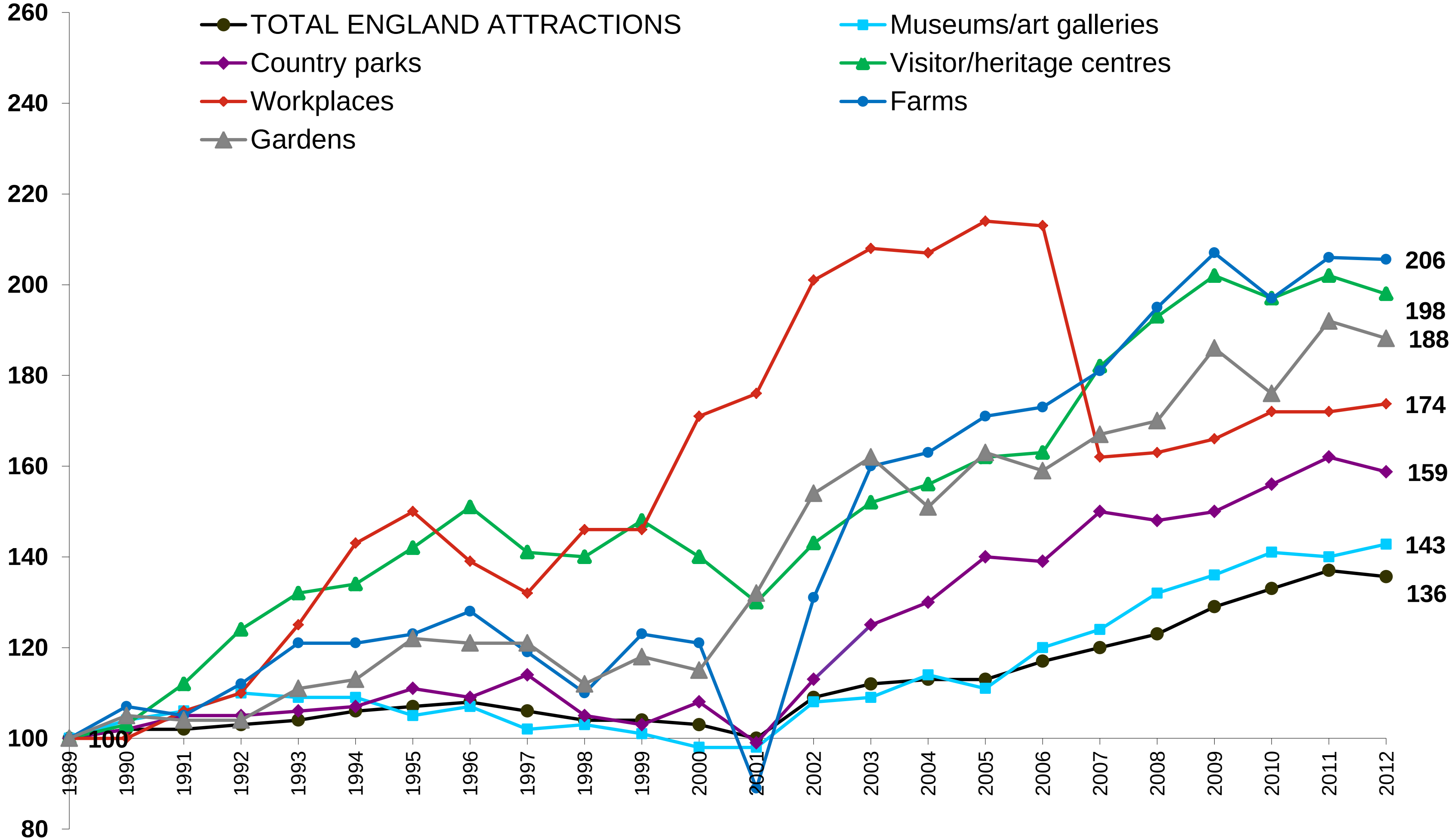
While attractions had benefited from the clement weather in 2011, the exceptional levels of rainfall made 2012 a difficult year. This was especially the case for attractions with a significant outdoor component, such as wildlife attractions and historic houses.

Steam/ heritage railways suffered the worst with 2012 (decline of -5%) further compounding a difficult 2011 (decline of -3%).

Museums / art galleries bucked the trend, picking up some of outdoor attraction business and growing their visitor numbers by 2%.

Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Index of visits to attractions – sectors outperforming market



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Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Index of visits to attractions – sectors outperforming market

Index Calculation

The charts presented on slides 13 and 15 show the indexed visits trend for each attraction category. The base year for the index is 1989, with the index set at 100 for that year. Annual percentage changes in visits are subsequently applied to this index e.g. visits to museums / art galleries increased +4% between 1989 and 1990, increasing the index for 1990 to 104.

Because the number of attractions responding each year differs, the percentage change between any two years is applied each time to the previous year's index to take account of varying sample sizes each year.

Operators are asked in each survey year to provide the number of visits for both the survey year and previous year. This enables the trend between any two years to be calculated based on the same attractions.

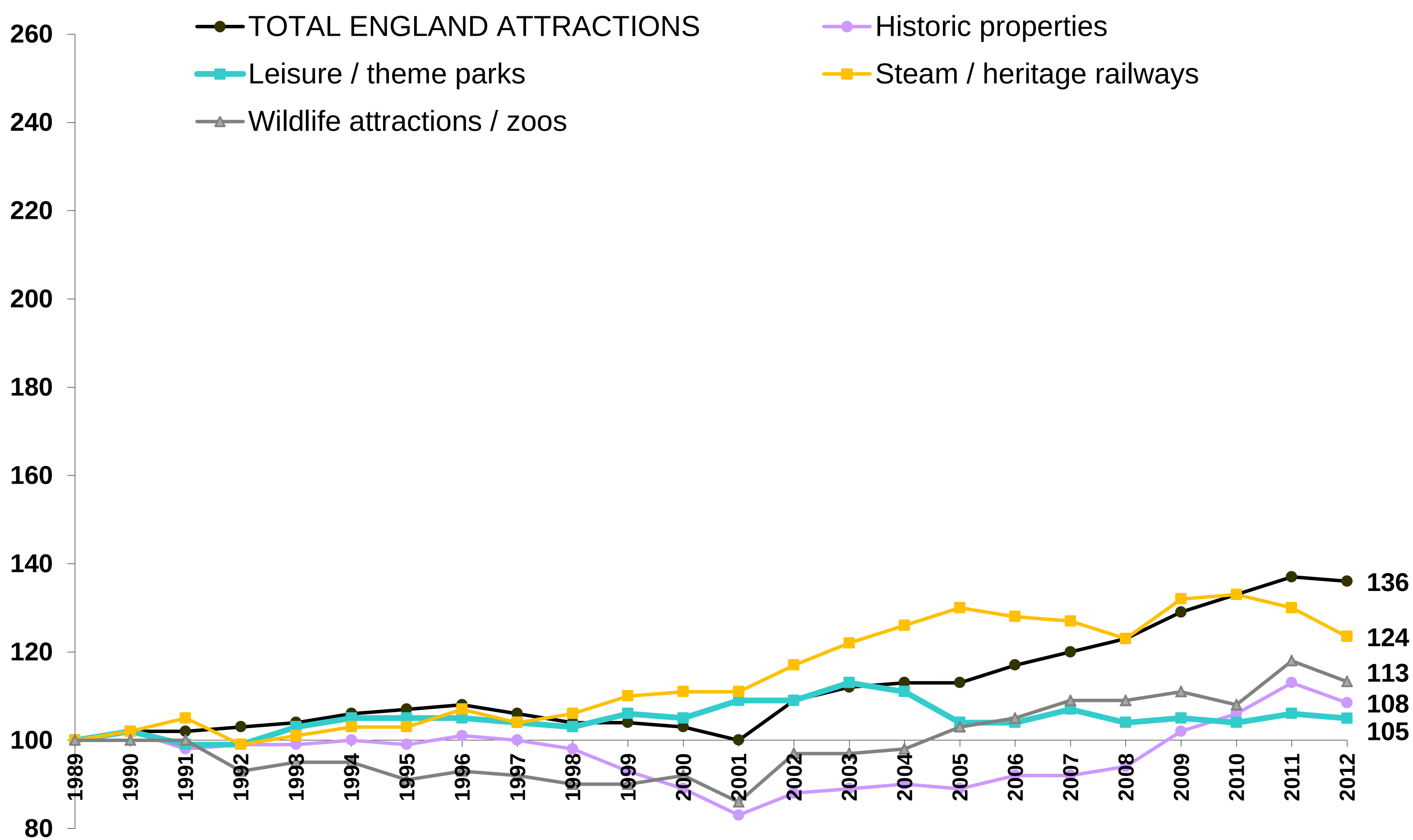
The chart shows the attraction categories which have shown above average annual visit increases since 1989. **Across England attractions as a whole, visits have increased 36% in that time.**

Farms have seen the greatest increase in visits, particularly in the last ten years, since the Foot and Mouth outbreak of 2001. Visitor / heritage centres and gardens have also seen very strong increases overall.

The popularity of workplaces saw a sharp drop in mid 2000s, but has seen a steady incline since then, and is one of the few sectors to have increased visitor numbers in 2012.

Visits to museums / art galleries overall are now over 40% higher than they were on the introduction of free entry to national museums in 2001. DCMS data on visits to former charging sponsored museums indicate that this increase has been primarily driven by visits to these museums. These figures state that visits to former charging sponsored London museums were up by +151% in the past ten years and those outside London by +148%.

Index of visits to attractions – sectors under performing against market



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Base: All attractions providing visits data for both 2011 and 2012 (1,456)

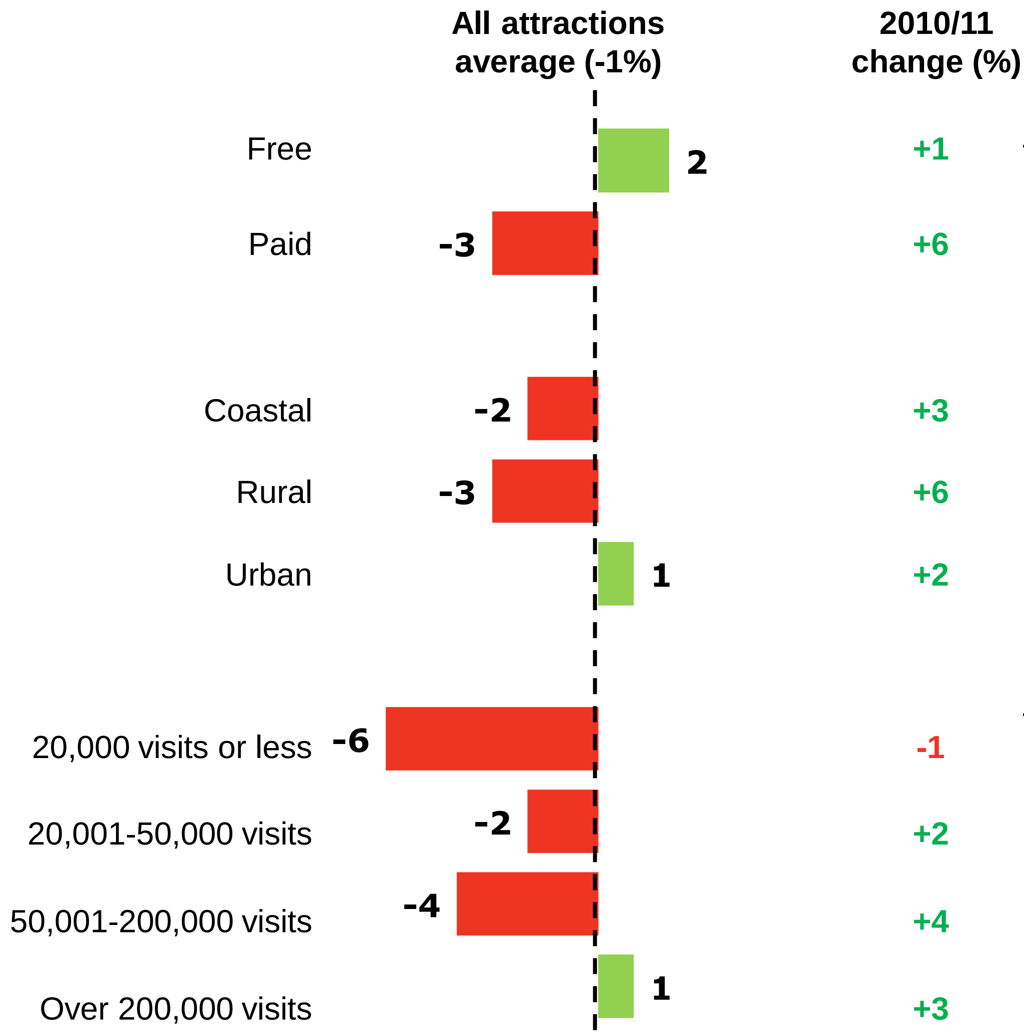
Index of visits to attractions – sectors under performing against market

Steam/ heritage railways, which had been performing above or in line with the industry average until 2010, have seen two years of decline, but remain 24% above the benchmark 1989 levels.

Historic properties and wildlife attractions/ zoos also reported a decline in visitor numbers following steady improvement since 2001. As attractions with a large outdoor component, this is likely to be driven by the wet weather in 2012.

Visits to leisure / theme parks have rather stagnated over the past eight years, although it should be noted that attractions operated by Merlin Entertainments are not included in this survey.

Visitor admission trends 2012 – by admission charge, geographic location and size



There was a slight increase (+1%) in the total number of domestic overnight holiday trips to urban areas in 2012 (*source: GBTS*). This is reflected in the performance of urban based attractions, with the category also no doubt boosted by a higher proportion of indoor attractions, which are more likely to attract visitors in poor weather.

Large attractions with 200,000+ visits per annum have outperformed the market, while attractions with fewer than 20,000 visits have suffered the worst.

This is associated with the stronger performance of urban areas, which house half (49%) of the largest (200,000+ visitors) attractions taking part in the survey, including the free London museums and galleries.

Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – paid and free attractions

Free Attractions	2012 change (%)	2010 / 11 change (%)
ALL FREE ATTRACTIONS (552)	2	+1
Country parks (37)	-2	+3
Farms (13)	1	+1
Gardens (9)	34	-<1
Historic houses / castles (23)	-7	+2
Other historic properties (37)	10	+22
Leisure / theme parks (4)	-8	+1
Museums / art galleries (274)	2	-1
Steam / heritage railways (3)	2	-7
Visitor / heritage centres (43)	-3	+2
Wildlife attractions/zoos (26)	-1	+3
Workplaces (12)	-1	-2
Places of worship (48)	2	+3
Other (23)	1	+6

Paid Attractions	2012 change (%)	2010 / 11 change (%)
ALL PAID ATTRACTIONS (904)	-3	+6
Country parks (3)	8	+5
Farms (25)	-1	+6
Gardens (74)	-8	+11
Historic houses / castles (290)	-4	+7
Other historic properties (77)	-5	+5
Leisure / theme parks (19)	2	+2
Museums / art galleries (218)	-1	+2
Steam / heritage railways (24)	-6	-3
Visitor / heritage centres (30)	0	+3
Wildlife attractions/zoos (49)	-5	+11
Workplaces (13)	18	+2
Places of worship (8)	-4	+9
Other (74)	1	+1

There was an increase in visitor admissions to free attractions in 2012 (+2%). This was suppressed by a substantial declines in the number of visits to historic houses/ castles (-7%) and to leisure/ theme parks (-8%). There was a significant increase in visits to free gardens, but these account for only a small number of attractions.

Paid attractions reported a -3% decrease in visits for 2012. Last year saw declines across most types of paid attractions, reflecting continued instability in the UK economy (with Gross Domestic Product in decline for three quarters in 2012). A very small number of paid country parks, and workplace attractions were the main sites to buck this trend.

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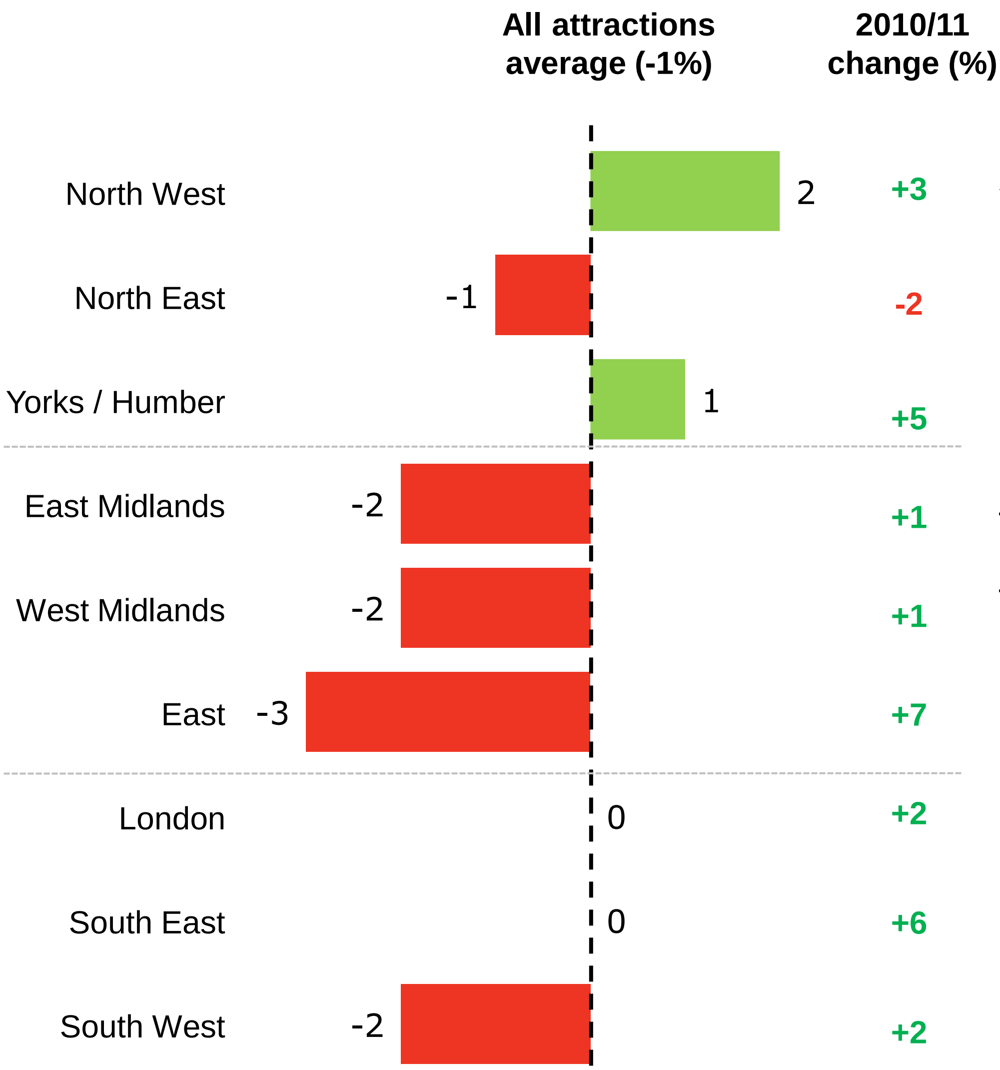
Base: All attractions providing visits data for both 2011 and 2012 (1,456)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor admission trends 2012 - by region



Attractions in the North West performed most positively in 2012. This is linked with a higher proportion of urban based attractions in this areas.

London and the SE held steady overall, despite any disruption over the summer resulting from the Olympics and Paralympics.

The greatest declines in visitors were in the more rural Midlands and coastal South West. The decline was most notable in the East of England which performed particularly well during the clement weather in 2011.

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Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – other regional dimensions

% change 2011 / 2012

	Free	Paid	Coastal	Rural	Urban
North West	7	-5	-8	-3	6
North East	0	-3	3	-4	-2
Yorks / Humber	2	-1	-7	1	1
East Midlands	-2	-2	3	-3	2
West Midlands	1	-4	n/a	-3	0
East	1	-7	-5	-6	3
London	1	-3	n/a	7	0
South East	4	-2	4	-2	1
South West	0	-4	-4	-4	4
All attractions	**+2%**	**-3%**	**-2%**	**-3%**	**+1%**

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Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – by attraction category within region

% change 2011 / 2012

	Region								
	NW	NE	Y+H	EM	WM	EAST	LON	SE	SW
Country parks	0	-3	+13	-2	-3	-4	+28	-5	+5
Farms	0	-	-2	+8	-2	-13	+47	+16	-6
Gardens	+49	-29	+1	-8	-11	-4	-13	-9	-7
Historic houses / castles	-6	-7	-8	-3	-2	-6	-4	-2	-6
Other historic properties	+10	-4	-6	-2	-8	-9	+1	+30	-1
Leisure / theme parks	-2	-3	+4	-15	0	+10	-	-3	-3
Museums / art galleries	+2	0	+1	+2	-1	+3	+2	+3	+3
Steam / heritage railways	-21	-	-7	+10	-	+1	-	+3	-4
Visitor / heritage centres	-4	-11	-6	+12	+7	+24	+13	-7	-4
Wildlife attractions / zoos	0	-8	+5	-4	-9	-10	-10	-2	-1
Workplaces	+18	-	+60	+23	0	+19	-	-1	0
Places of worship	-7	+10	+15	+5	+1	-6	-4	-5	+2
Other	-2	+5	+12	+3	-9	+1	-8	+20	-6

N.B. Figures in grey represent data where there is less than 5 attractions in the group.
Results should therefore be treated with caution

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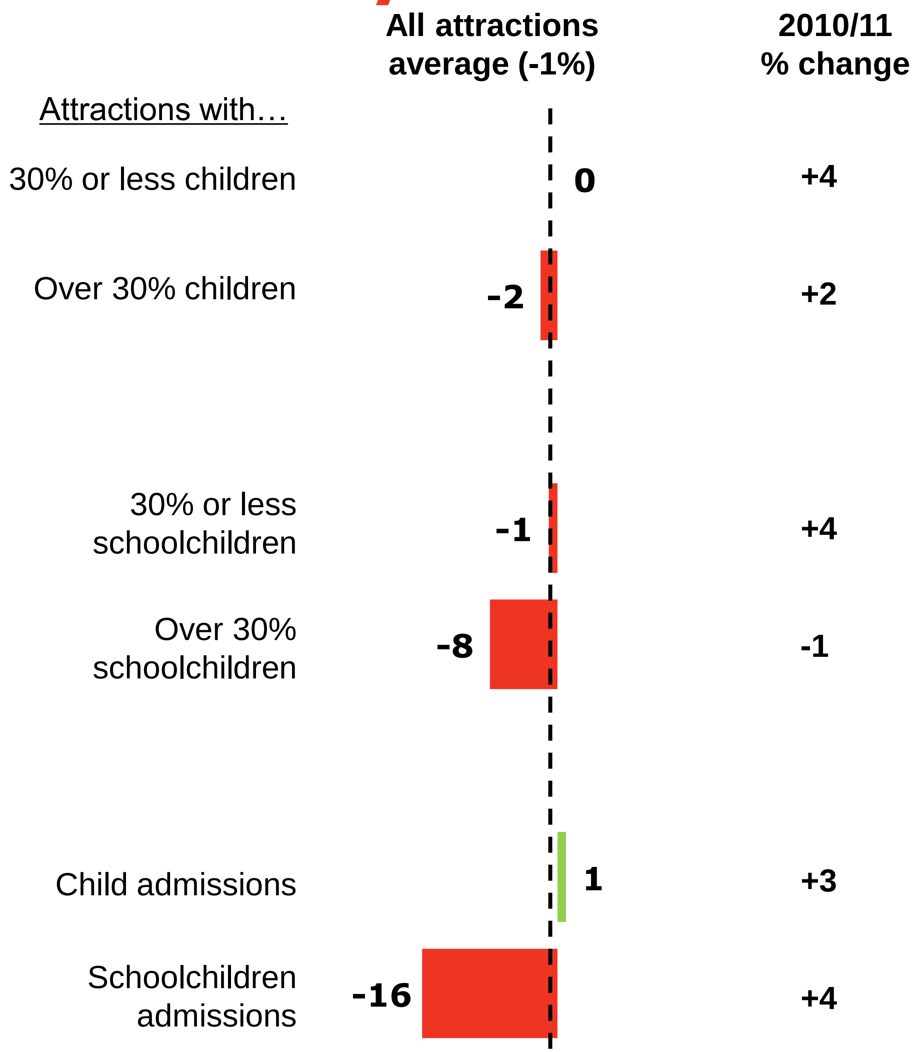
Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – child visits summary



Attractions with over 30% of their visits accounted for by children (perhaps described as family attractions) experienced a -2% decrease in visitor numbers.

Sites with a high proportion (over 30%) of visits made up by school children had another difficult year in 2012, seeing overall visitor numbers decline by -8%. This is associated with a significant drop in the overall number of school visits.

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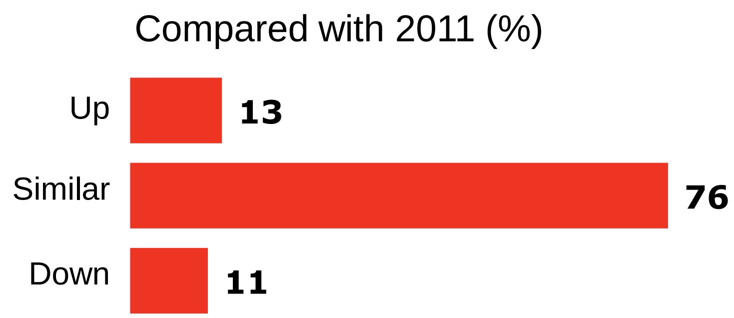
Base: All attractions providing visits data for both 2011 and 2012 (1,456)

Visitor admission trends 2012 – by visitor origin

Overseas visitors

+10%
in visits

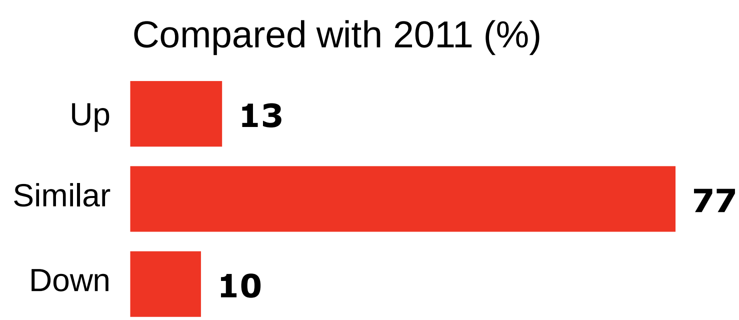


Across the attractions sector, overseas visits were up by 10% in 2012. However, this trend was driven by a small number of the large London sites, and most other areas of the country saw a decline in visits.

Over half (56%) of overseas visits are accounted for by London attractions, with overseas visitors up by +20% here.

Local / day trippers

-5%
in visits



Attractions reported local visitors within day trip distance down by -5% in 2012.

This shift is also driven by London where day trips were down by -7%; The South West also saw a marked decline in local/ day trip visitors (-20%), most likely associated with the poor weather across most of 2012.

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Base: All attractions responding (c.1,511)

Visitor admission trends 2012 – overseas visitors by attraction category and region

Attraction Category: overseas visitors

% down		% up	2011/12 % change
-15	Country parks	12	↓ 18%
-29	Farms	31	↑ 17%
-35	Gardens	26	↓ 5%
-49	Historic houses / castles	23	↓ 4%
-53	Other historic properties	27	↓ 1%
-42	Leisure / theme parks	16	↑ 9%
-31	Museums / art galleries	34	↑ 18%
-24	Steam / heritage railways	32	↓ 8%
-39	Visitor / heritage centres	26	↓ 4%
-23	Wildlife attractions / zoos	21	↓ 4%
-31	Workplaces	35	↓ 10%
-27	Places of worship	35	↑ 3%
-37	Other	24	↑ 34%

Museums/ galleries and farms attracted the largest increases in overseas visitors in 2012.

Region: overseas visitors

% down		% up	2011/12 % change
-31	North West	28	↑ 3%
-42	North East	30	↑ 0%
-33	Yorks / Humber	31	↓ 6%
-37	East Midlands	29	↑ 0%
-43	West Midlands	20	↓ 1%
-34	East	29	↓ 18%
-29	London	38	↑ 20%
-38	South East	29	↓ 2%
-37	South West	24	↑ 7%

London was by far the biggest winner for overseas visitors in 2012 – no doubt helped by the Olympics Games and publicity associated with this.

The South West and North West also saw growth in international tourism, while the East of England saw a substantial decline in visitor numbers.

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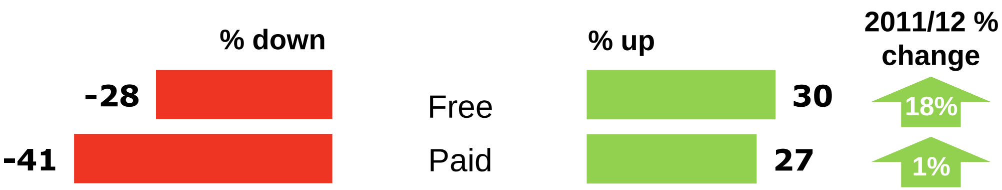
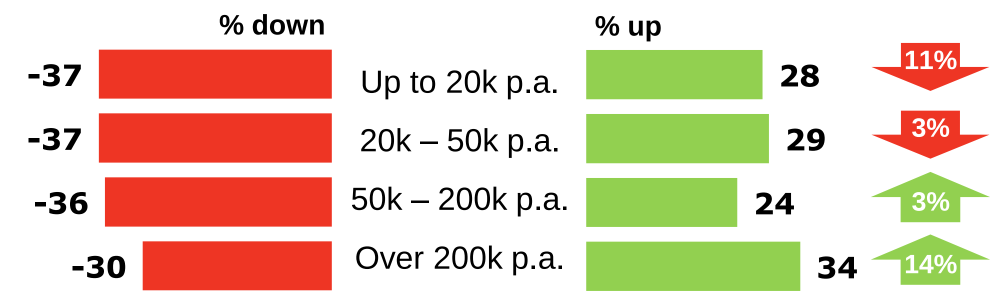
Base: All attractions responding (c.1,511)

Visitor admission trends 2012 – overseas visitors by size and admission charge

Admission Charge: overseas visitors



Size: overseas visitors



The increase in overseas visitors was driven primarily by free admission attractions, with over 200,000 visitors a year.

It seems that the large government funded London museums and galleries have seen most of the benefit from the increase in international tourism.

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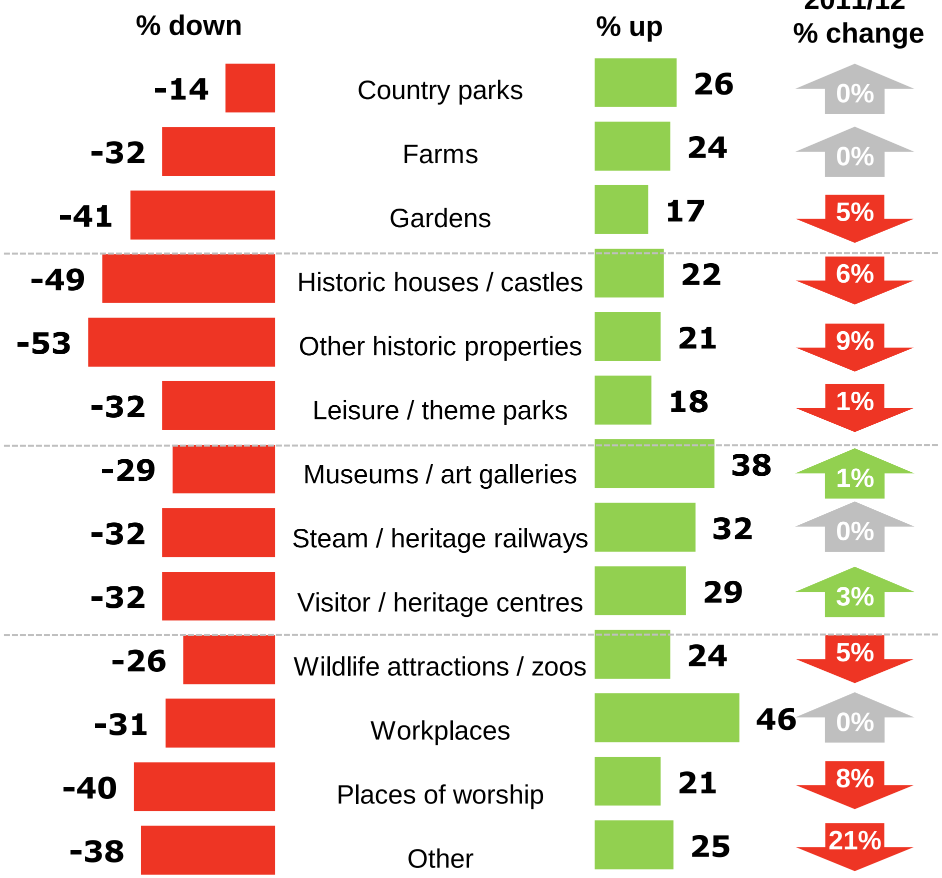
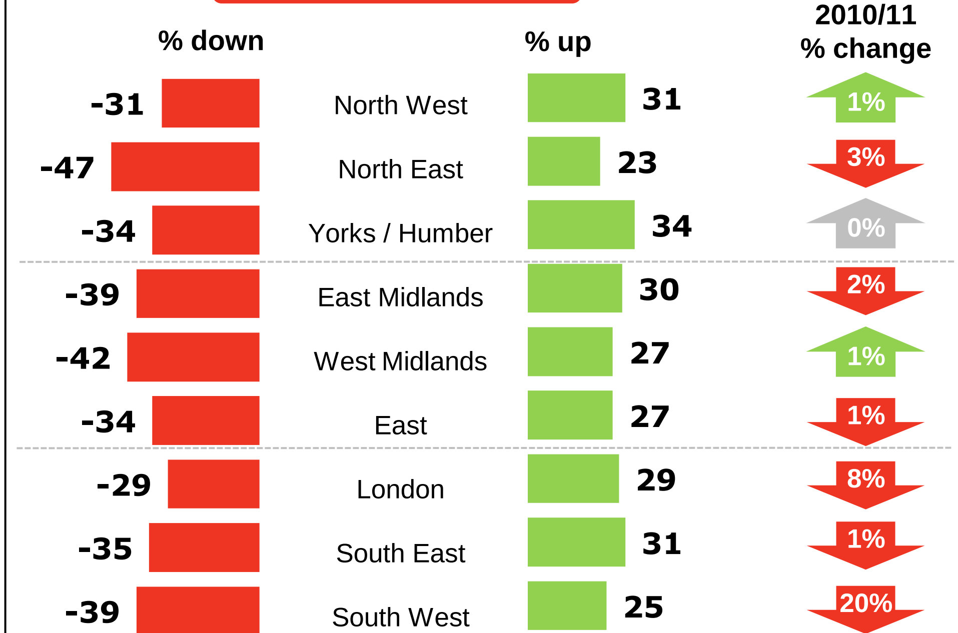
Base: All attractions responding (c.1,511)

Visitor admission trends 2012 – local / day trip visitors by attraction category and region

Attraction Category: local visitors



Region: local visitors



Most categories and regions reported 2012 local visitor numbers similar to 2011. However, a significant decline in the local market was experienced in the South West – perhaps associated with the poor weather, which is important for attractions in this region. 'Other' attractions (largely outdoor attractions such as model villages, piers, caves) also reported a big drop in local visitors.

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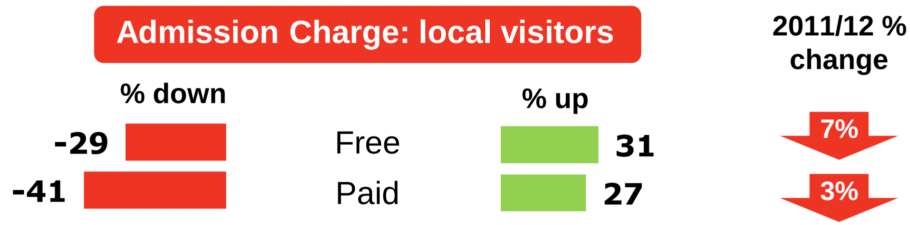
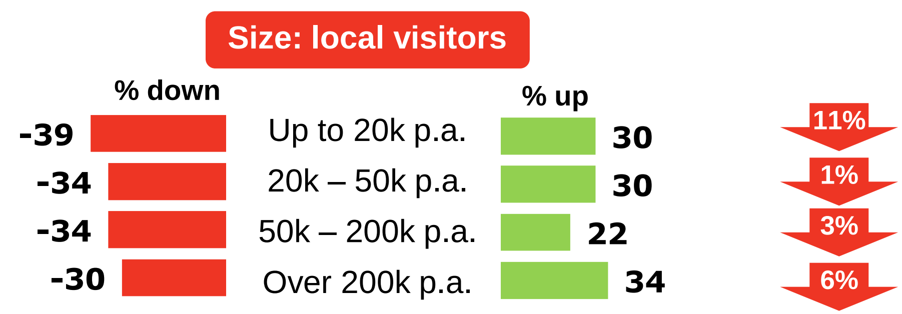
Base: All attractions responding (c.1,511)

Visitor admission trends 2012 – local / day trip visitors by size and admission charge



Free sites experienced a larger drop in the actual number of local visitors in 2012, although charging sites were more likely to report a decline.

All sizes of attraction suffered a decline in local visitors in 2012.



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Base: All attractions responding (c.1,511)

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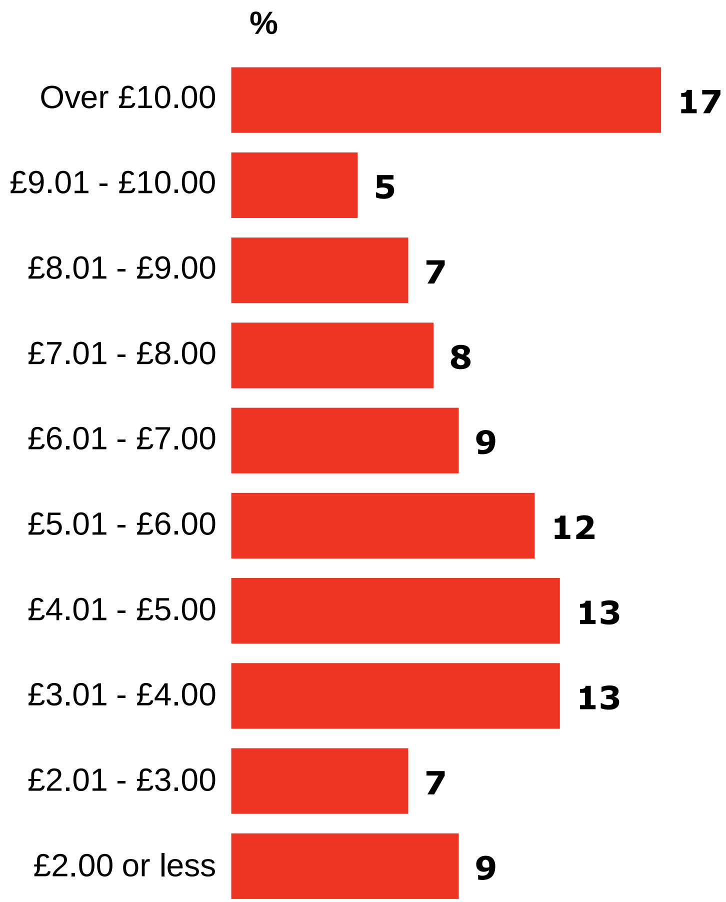
Admission charge and revenue trends

Adult admission charges 2012



43% of attractions charging admission, charge £5 or less for entry. One in six charge over £10.

The average entry charge stands at just over £7.

By contrast, the average child admission charge amongst those sites charging is £4.45. Less than a quarter of charging sites (23%) charge over £5 for child entry.

Base: Attractions charging for admission in 2012 (902)

Adult admission charge trends 2012 – by attraction category

	% increase in adult charge versus 2011	Average 2012 charge	2010/11 change (%)
ALL ATTRACTIONS	4	£7.05	+5
Country parks	0	£5.00	+6
Farms	5	£6.72	+6
Gardens	7	£6.23	+3
Historic houses / castles	5	£6.62	+6
Other historic properties	3	£4.38	+6
Leisure / theme parks	6	£13.88	+6
Museums / art galleries	5	£4.88	+6
Steam / heritage railways	8	£11.13	+6
Visitor / heritage centres	2	£6.00	+7
Wildlife attractions / zoos	3	£9.29	+5
Workplaces	-2	£7.46	+6
Places of worship	9	£8.25	+5
Other	1	£15.11	+3

Leisure/ theme parks (£13.88), steam/ heritage railways (£11.13) and wildlife attractions/ zoos (£9.29) have the highest average admission prices, which may explain their below market performance in growth in visitor numbers.

The average increase in **adult admission fees** is 4% this year – consistent with increases during the previous four years, with increases of 5% (2011), 5% (2010), 4% (2009) and 5% (2008).

This is above the rate of inflation, as the Consumer Price Index ran at an average of 2.7% for 2012, while the Retail Prices Index was 3.1%.

Increases were highest at places of worship (9%) and steam/ heritage railways (8%).

Average **child admission charges** increased by an average of 3% in 2012.

Base: Attractions providing admission charge data for both 2011and 2012 (904)

Adult admission charge trends 2012 – by region

% change in adult admission charge

	All attractions average (4%)	Average 2012 charge	2010/11 change (%)
North West	3	£7.31	+4
North East	3	£5.50	+4
Yorks / Humber	4	£6.75	+7
East Midlands	2	£6.07	+5
West Midlands	3	£6.85	+6
East	6	£7.29	+8
London	4	£8.95	+5
South East	5	£7.34	+5
South West	4	£7.19	+4

London charging attractions remain the most expensive (at £8.95 on average), £1.61 more than the second most expensive region, the South East.

The East is one of the highest charging regions and is the region to have increased admission prices the most (+6%).

Sites in the North East charge the the least (£5.50 on average).

Adult admission charge trends 2012 – by attraction size

% change in adult admission charge

Annual visits	All attractions average (4%)	Average 2012 charge	2010/11 change (%)
20,000 or less p.a.	3	£5.28	+2
20,001 – 50,000 p.a.	3	£7.49	+7
50,001 – 100,000 p.a.	5	£7.81	+4
100,001 – 200,000 p.a.	5	£9.07	+5
Over 200,000 p.a.	6	£11.85	+7

Site admission charges increase in line with the number of visitors attracted, with those bringing in more than 200,000 visitors a year now charging almost £12 on average.

The largest sites (those with over 200,000 visitors) appear to be more bullish about pricing, making larger increases to admission charges in 2012.

VisitEngland™

Base: All attractions providing admission charge data for both 2011 and 2012 (904)

Adult admission charge trends 2012 – by geographic location and child admissions

% change in adult admission charge

	All attractions average (4%)	Average 2012 charge	2010/11 change (%)
Coastal	4	£6.17	+4
Rural	4	£7.64	+6
Urban	6	£6.07	+2
Attractions with…			
30% or less child visits	4	£5.91	+3
Over 30% child visits	4	£6.99	+7
30% or less overseas visits	4	£6.23	+4
Over 30% overseas visits	4	£9.03	+4

Attractions at rural destinations are around £1.50 more expensive on average than those in coastal/ urban areas. However, change in admission pricing as slowed, down from +6% in 2011 to +4% in 2012.

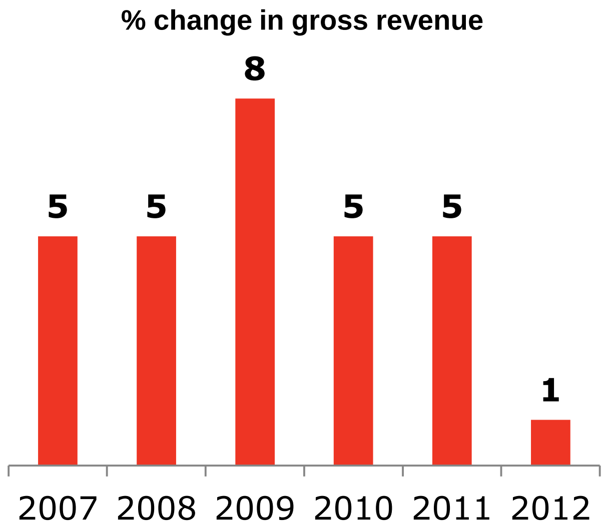
Pricing at urban attractions has increased the most (by +6%), having largely held prices in 2011 (+2%).

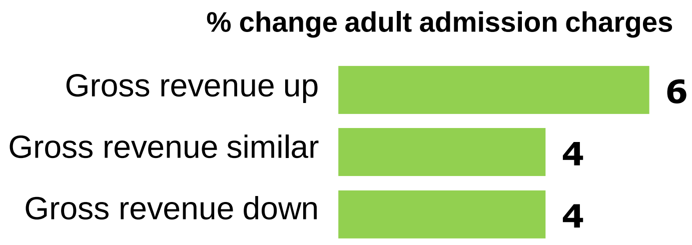
Price rises remain consistent between sites attracting families/ non-family and domestic/ overseas audiences.

VisitEngland

Base: All attractions providing admission charge data for both 2011 and 2012 (904)

Gross revenue trend





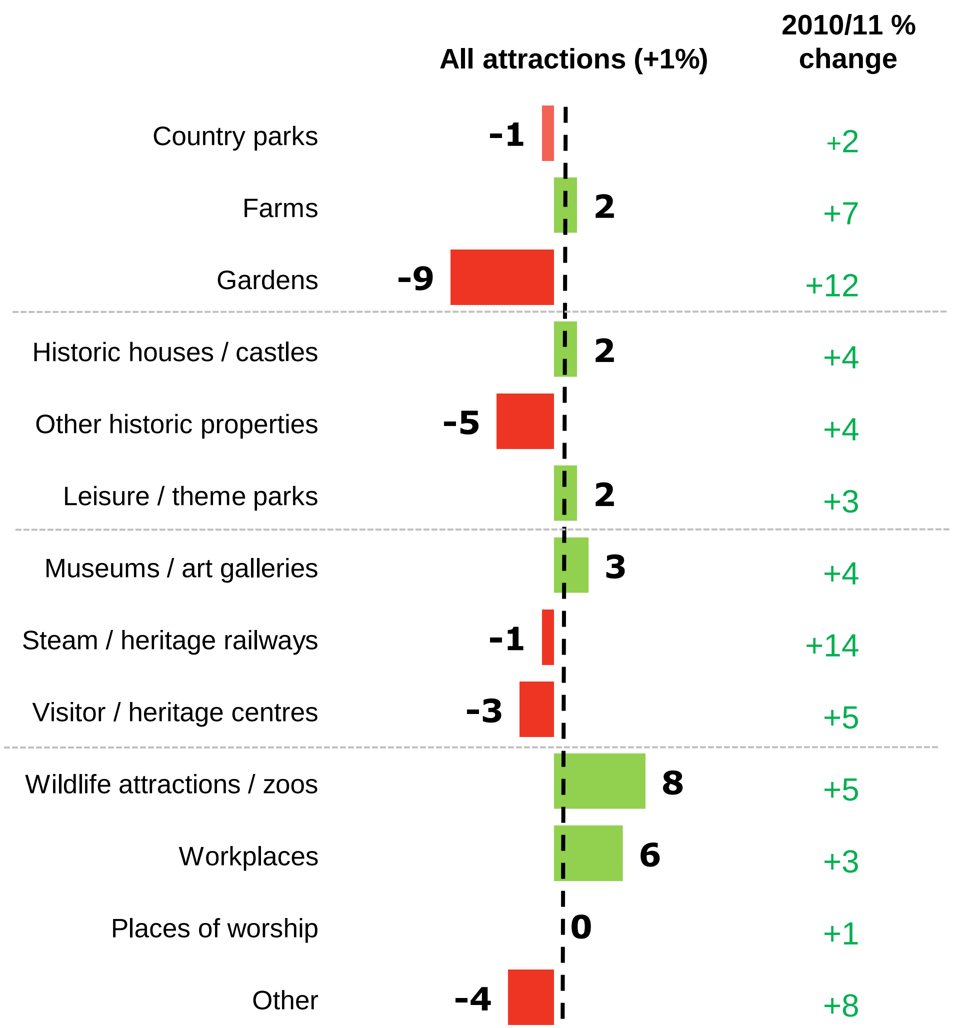
Gross revenue overall remained fairly consistent with 2011, being limited to +1% growth.

More attractions actually reported a decrease (36%) than an increase (27%) in revenue in 2012.

Revenue is correlated with change in adult admission prices, with larger price increases generating more revenue.

Base: All attractions responding (1,047)

Gross revenue trend 2012 – by attraction category



Despite an overall decline in visitor numbers, half of the categories managed to grow revenue slightly in 2012.

Revenue growth was up for Workplaces - which saw an increase in visitor numbers in 2012, which may also have delivered additional secondary spend.

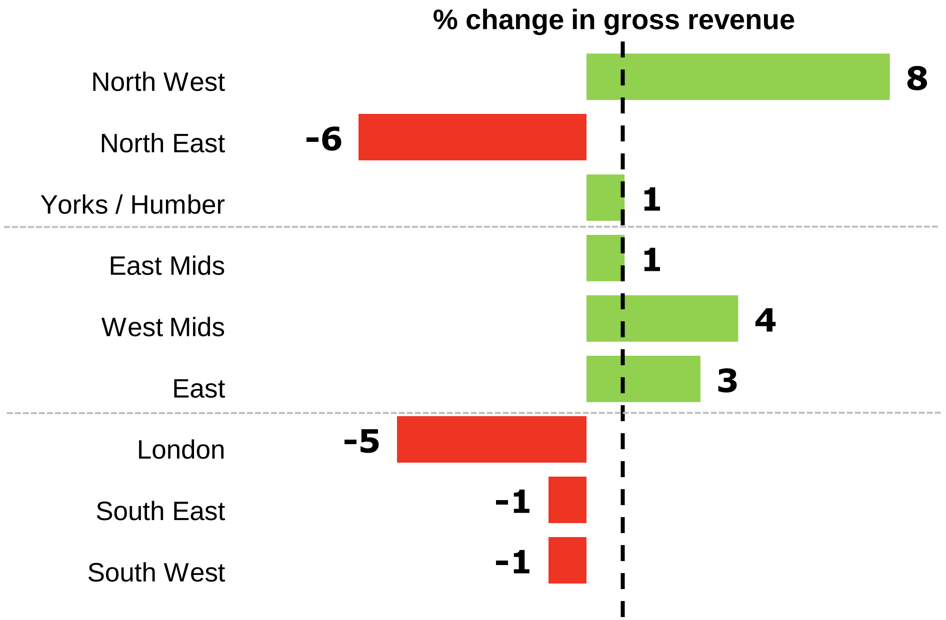
Visitor numbers were down at wildlife attractions. However, this sector does have a range of avenues to collect additional revenue, such as a retail offer, catering and membership scheme.

Gardens suffered the greatest loss of revenue, associated with the decline in visitors at paid attractions.

VisitEngland

Base: All attractions responding (1,047)

Gross revenue trend – by region

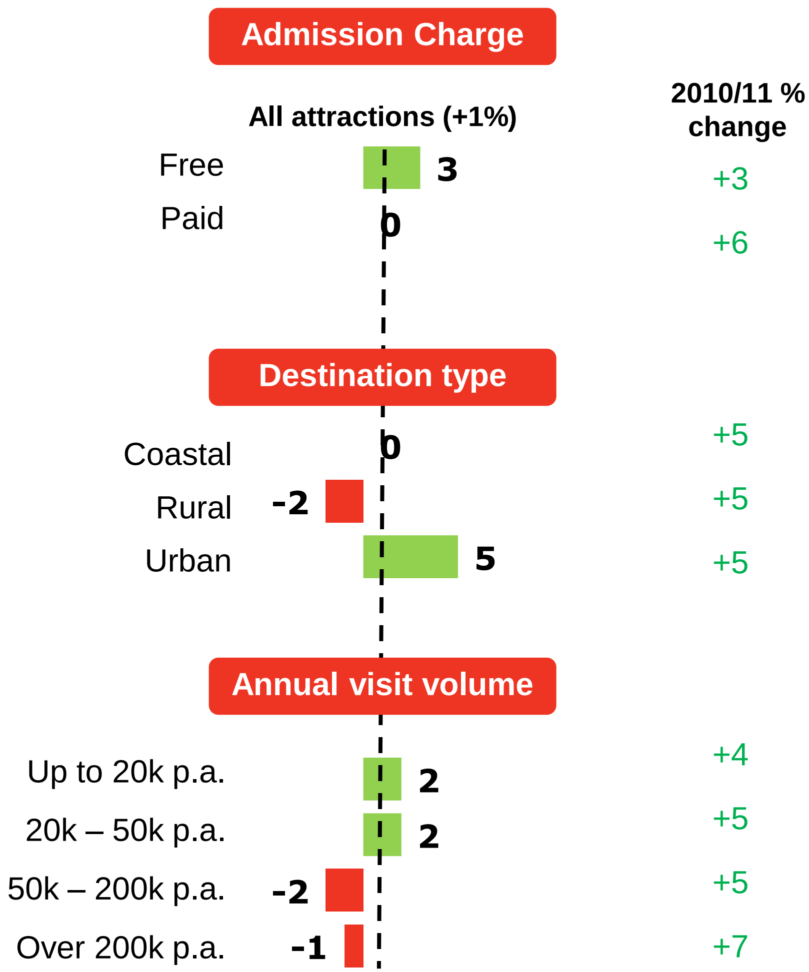


Declines in revenue were most marked in London and the North East. In London this is likely to be linked to funding cuts, while the decline of overseas visitors will have contributed to the reduction in revenue in the North East.

VisitEngland

Base: All attractions responding (1,047)

Gross revenue trend 2012 – by admission charge and visit volume



In contrast to recent years, free attractions have seen more growth in revenue than those charging for entry. This is associated with the stronger visitor numbers at these sites in 2012.

While free sites are still less likely to have multiple revenue streams than paid for attractions, a healthy proportion do offer facilities and events that are revenue generating.

Urban attractions have grown revenue by +5%, following their +1% increase in admissions and +6% increase in admission fees.

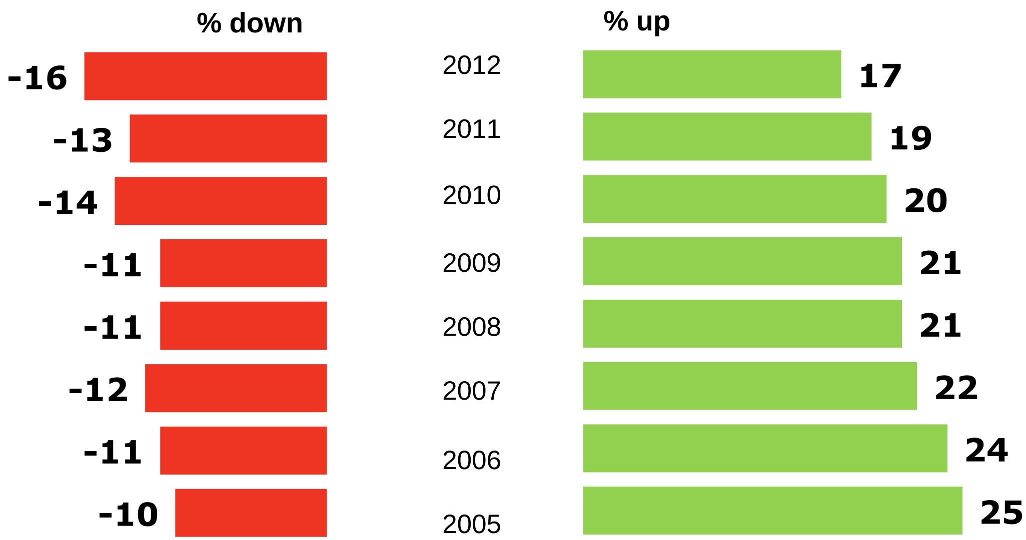
Gross revenue at rural attractions has declined, reflecting the -3% drop in visitor numbers.

Despite a growth in visitor numbers, and increase in admission prices, the largest attractions have seen revenues hit worst. This may be related to funding cuts, or perhaps visitors are cutting back on spend once in the site to counter the high entrance fees.

Base: All attractions responding (1,047)

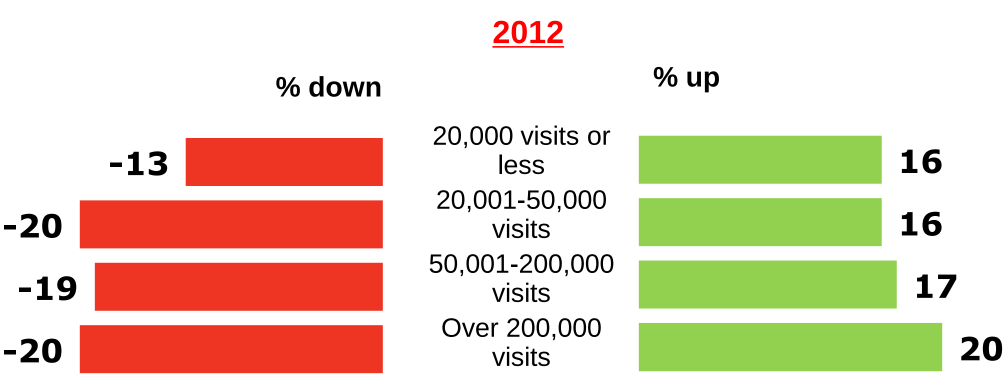
Marketing and communications trends

Marketing expenditure trend



Over the past eight years, the proportion of attractions reporting increases in marketing expenditure has been in gradual decline. There are now nearly as many attractions decreasing their marketing investment as there are increasing.

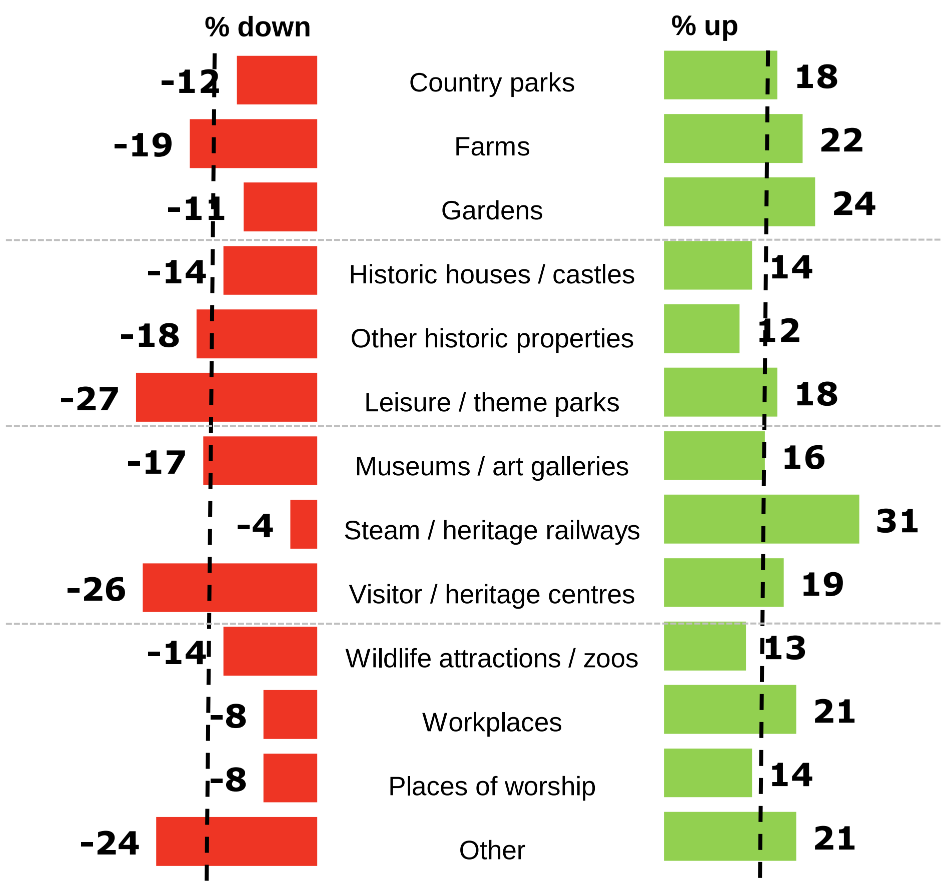
Small attractions (with no more than 20,000 visits a year) are most stable in their marketing spend.



VisitEngland

Base: Attractions answering marketing question (1,147)

Marketing expenditure trends 2012 –by attraction category



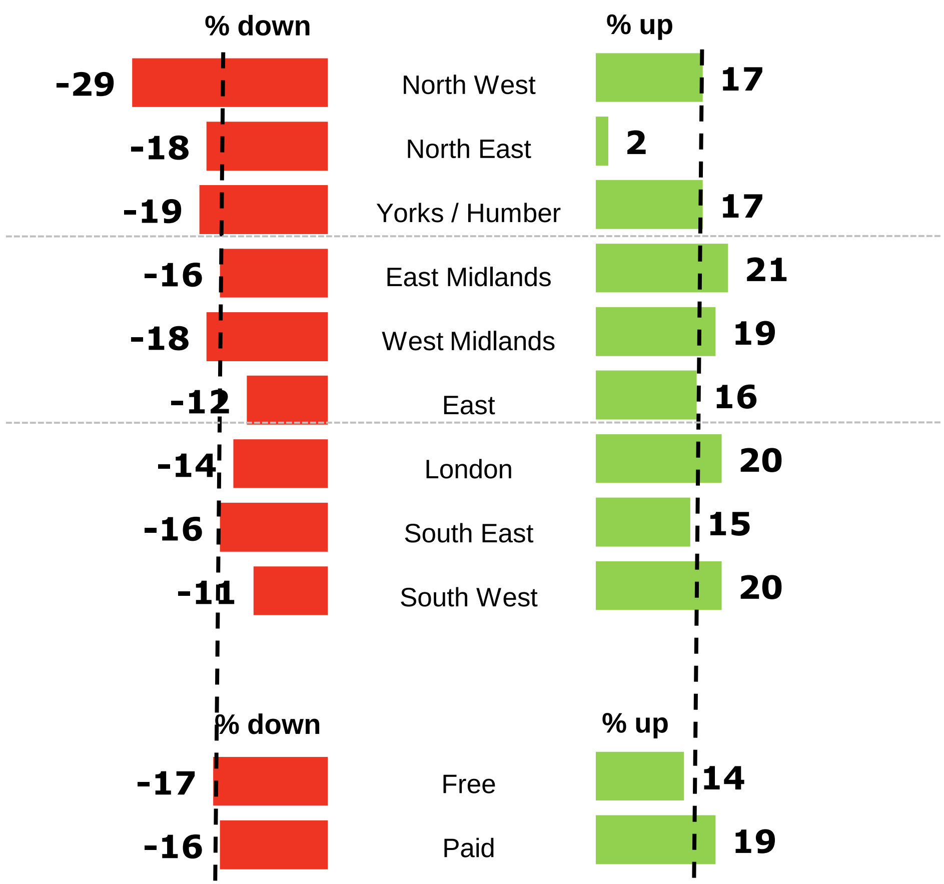
Gardens, steam/ heritage railway and workplace sectors have continued to increase investment in marketing.

This is working well for workplaces, which is one of the only two sectors to have continued to grow visitor numbers this year.

However, steam/ heritage railways and gardens have a both seen a fall in visitor numbers. Perhaps marketing was unable to overcome the weather barrier for these sectors.

Base: Attractions answering marketing question (1,147)

Marketing expenditure trends 2012 – by region and admission charge



As reported in recent years, paid attractions continue to be more likely to increase their marketing expenditure than free attractions.

2012 saw a decline in attractions investing in marketing in the North West and North East.

VisitEngland

Base: Attractions answering marketing question (1,147)

Impact of marketing expenditure - summary

	Marketing spend in 2012	
2011 / 12 change in…	Up	Down
Total visitor admissions	+3%	-1%
Local visits	+6%	-14%
Overseas visits	+8%	+11%
Gross revenue	+5%	-6%

Attractions increasing their marketing expenditure in 2012 were more likely to report increases in visitor numbers and gross revenue.

Visitor admissions increased by +3% among those increasing their marketing spend compared with a decline of -1% amongst those who cut back on marketing.

Gross revenue followed the same pattern, and fell amongst attractions reducing their marketing spend.

The impact of marketing is most evident amongst the local audience, with the number of visits up by +6% amongst sites increasing their marketing spend, vs. a decline of -14% amongst those cutting back.

While it is possible that some sites were forced to cut back on marketing spend due to falling revenue, the market view suggests that marketing spend is a good investment.

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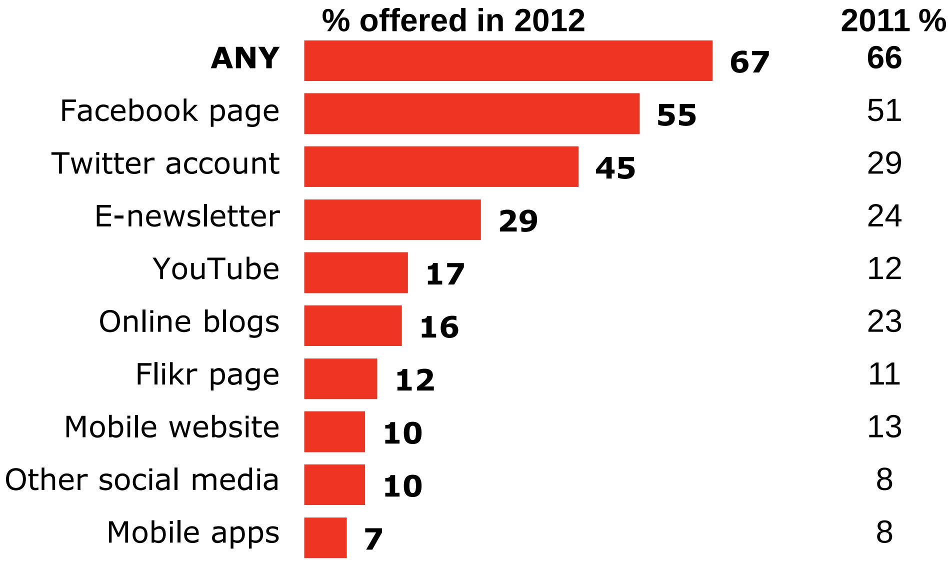
Digital communications offered



% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	52	74	88
Facebook page	38	64	83
Twitter account	28	52	72
E-newsletter	17	29	55
YouTube	7	17	39
Online blogs	8	17	34
Flickr page	4	11	30
Mobile website	6	9	21
Other social media	6	11	21
Mobile apps	3	7	16

Consistent with 2011, two-thirds (67%) of all attractions offered some form of digital communications in 2012.

Over half of small attractions (with 20,000 visitors or less) now use at least one form of digital communication.

Facebook and Twitter are now in common use, even amongst smaller attractions.

The popularity of online blogs has declined in the last year; instead Twitter has really taken off (now used by 45% of attractions vs. 29% in 2011).

Other digital communications are mostly used by larger attractions (100,000 visitors or more).

Base: All answering digital communications question (1,346)

Digital communications offered in 2012 – by attraction category

% offering	Country Parks	Farms	Gardens	Historic houses / castles	Other historic properties	Leisure / theme parks	Museums / art galleries	Steam / heritage railways	Visitor / heritage centres	Wildlife / zoos	Work-places	Places of Worship	Other
Facebook	45	79	65	46	27	88	56	74	68	76	48	40	69
Twitter account	21	50	55	43	21	58	46	63	55	65	37	33	42
E-newsletter	21	39	31	16	11	50	36	44	25	41	33	31	19
Online blogs	12	24	31	13	5	21	18	15	5	39	11	5	16
Mobile website	12	8	4	5	7	29	10	19	7	16	11	16	19
YouTube	7	24	17	9	7	33	21	22	17	32	4	7	18
Flickr page	10	11	13	10	5	4	18	15	7	16	-	4	8
Mobile apps	17	-	11	8	4	8	8	4	5	9	4	5	8
Other social media	7	16	8	5	4	13	15	-	8	12	15	9	10
ANY	**60**	**92**	**80**	**52**	**34**	**92**	**69**	**85**	**76**	**88**	**63**	**65**	**79**

Attractions geared toward the family audience tend to be more deeply involved with digital communications – almost 90% of farms, leisure / theme parks and wildlife attractions / zoos offer some form of digital communication. Indeed, three-quarters (77%) of attractions who have over 30% of their visitors consisting of children offered digital communications compared with just 61% among attractions with fewer than 30% of their visitors being children.

'Other historic properties', such as monuments, are somewhat behind the digital communications curve.

Base: All answering digital communications question (1,346)

Impact of digital communications - summary

	Offer any digital communications?	
2010 / 11 change in…	**Yes**	**No**
Total visitor admissions	0%	-2%
Children admissions	+4%	-13%
Local visits	-5%	-7%
Overseas visits	+12%	-3%
Gross revenue	+3%	-1%

Those attractions offering some form of digital communications platform in 2012 reported stronger increases (or less decrease) in gross revenue.

Gross revenue increased by +3% amongst those offering digital communications, but declined by -1% amongst sites not offering.

The impact on total admissions was more muted, but sites offering communications reported stable revenue, while those not offering saw a decline of -2%.

Digital communications seem to be most important for the family and overseas markets as there is a marked difference in admissions between attractions that do offer and don’t offer digital communications for these audiences.

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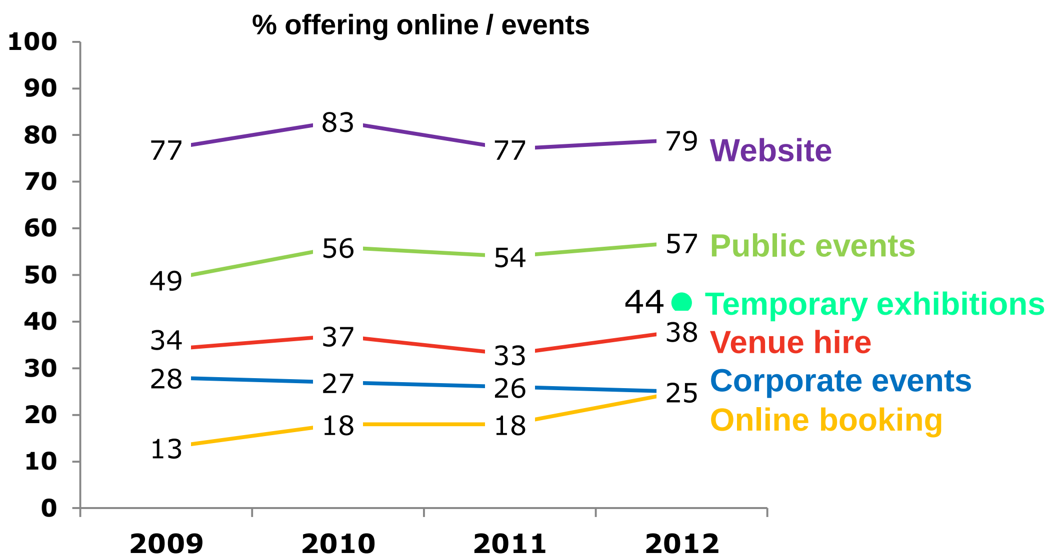
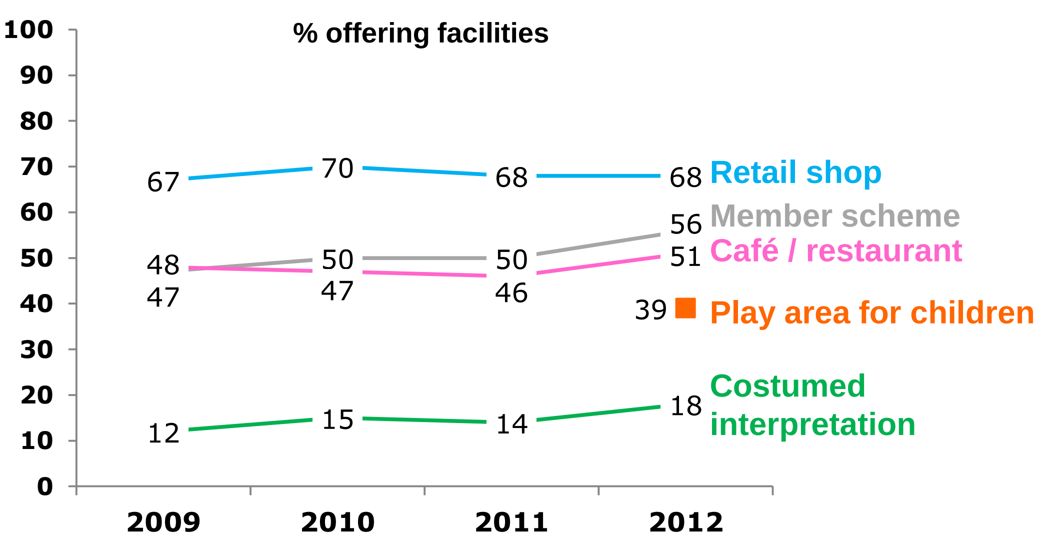
Provision of services trends

Provision of services trends





Attractions are asked about the services that they offered across five dimensions:

- Online
- Facilities
- Interpretation
- Events
- Membership

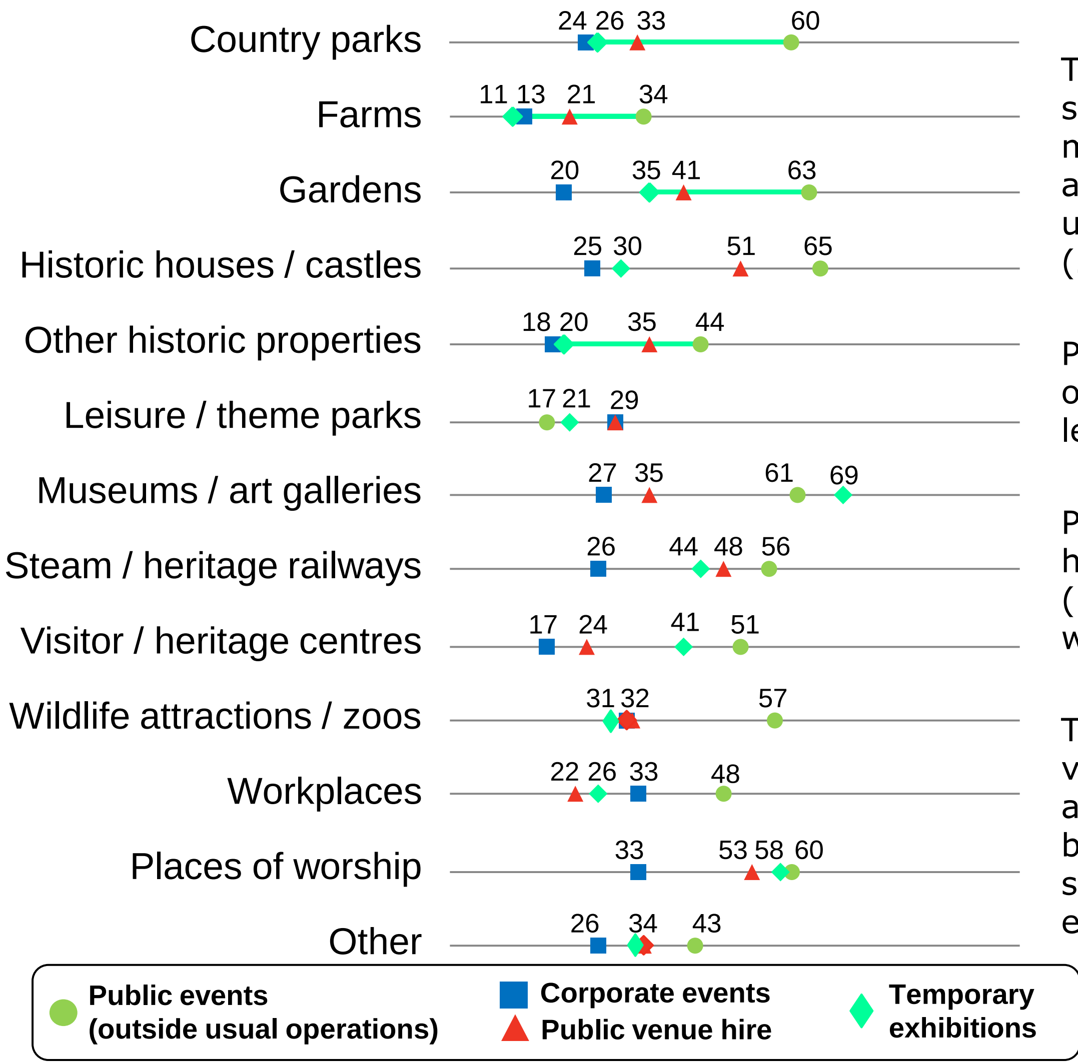
We see an increase in provision across most categories, although this may be driven by the profile of responding attractions, as there are fewer small attractions of 10,000 visitors or less in 2012 and these sites are less likely to offer the same level of facilities.

Offer of Corporate events, however, has been in decline for the last three years, reflecting the difficult economic climate, where many businesses are cutting back on any unnecessary expenditure.

VisitEngland

Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – events provision by attraction category



Temporary exhibitions are put on across all sectors, but as we would expect they are much more likely at museums and galleries (69%) and places of worship (58%), are more unusual at farms (11%), leisure/ theme parks (21%) and 'other historic properties' (20%).

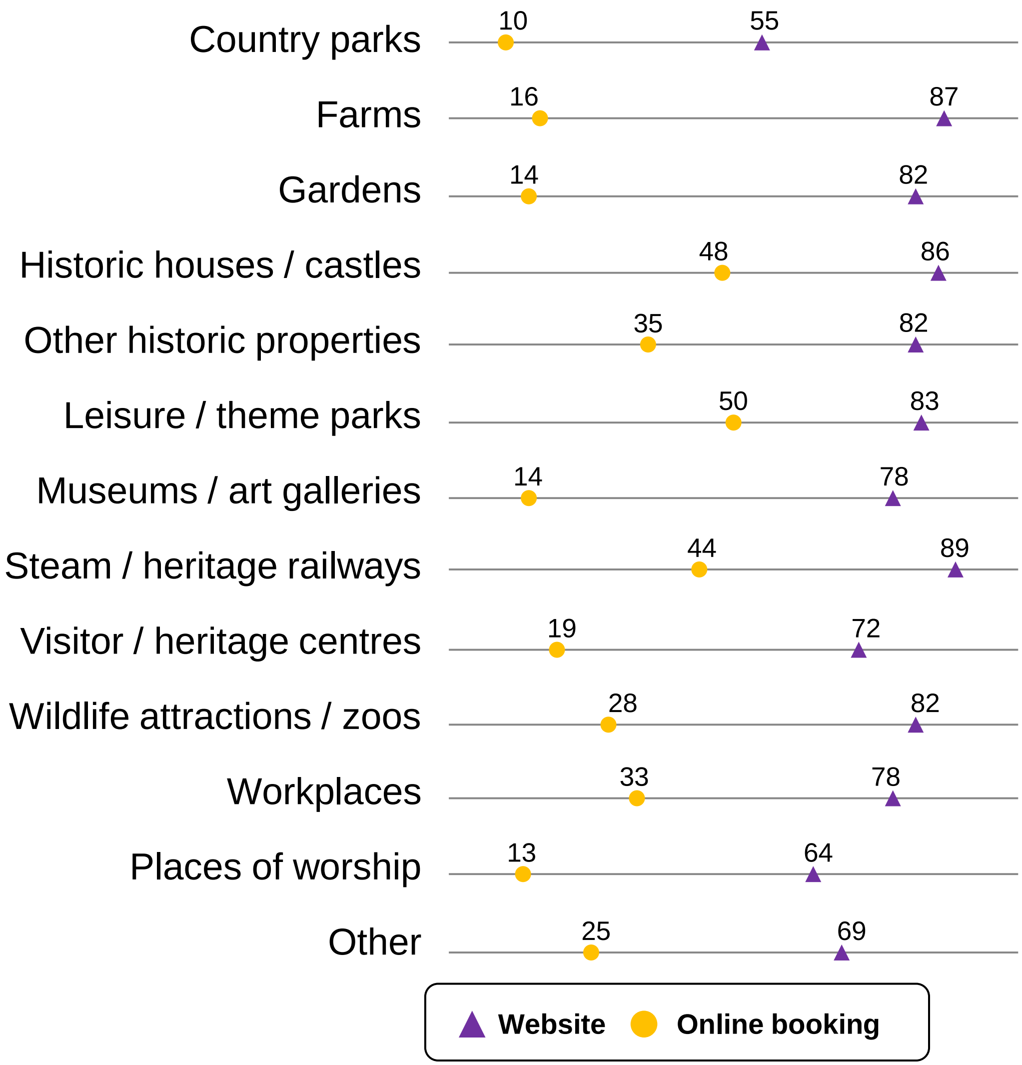
Public events are common, with at least 40% of sites offering these across all sectors bar leisure/ theme parks (17%) and farms (34%).

Public venue hire is most typical at historic houses/ castles (51%) and places of worship (53%). This is less common at farms, workplaces and visitor/ heritage centres.

There is relative consistency in offering public venue hire, with around 20-33% and of attractions providing this facility. It is offered by fewer farms, most likely due to rural settings/ lack of suitability for these types of events.

Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – online provision by attraction category



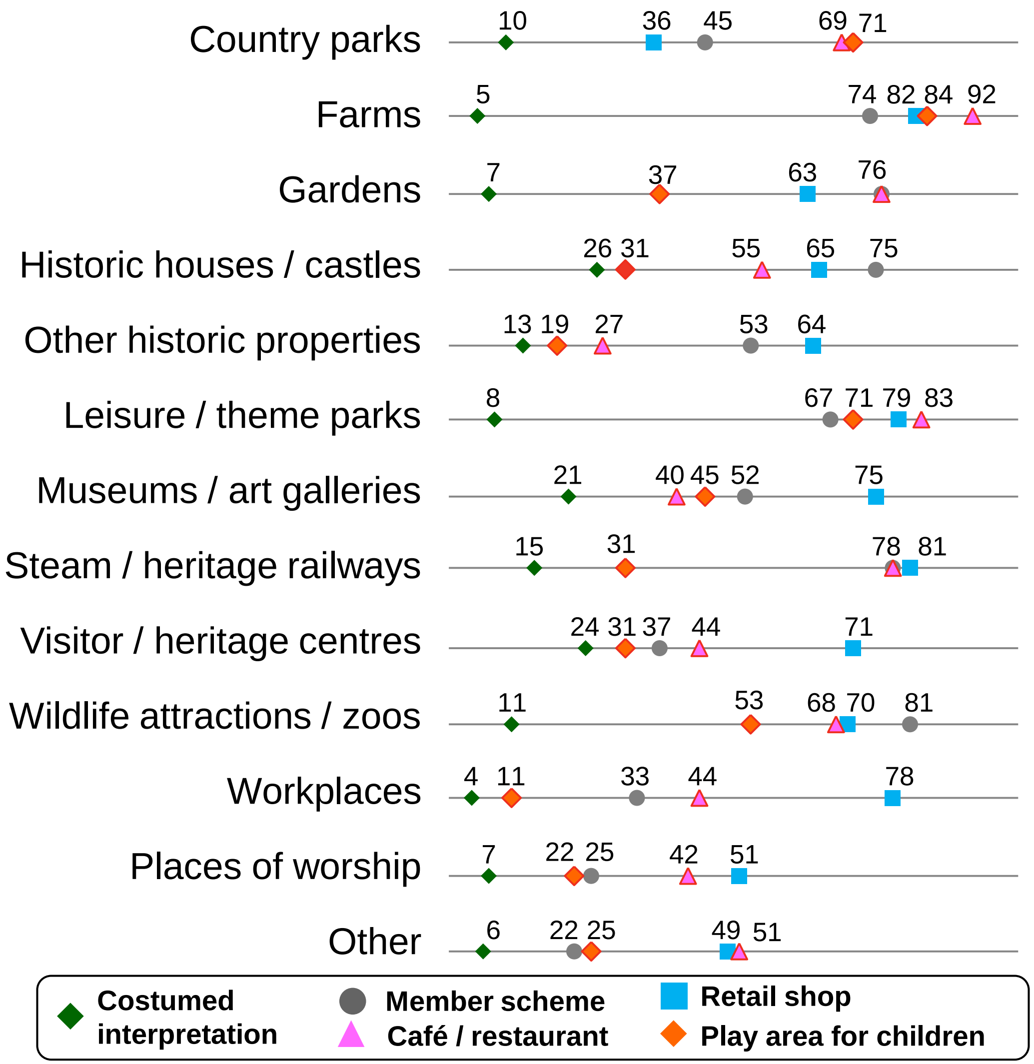
The majority of attractions (79%) have their own website, although this is significantly lower (55%) for country parks.

Provision of online booking is more varied across the different sectors. It is most common for leisure/ theme parks, historic houses/ castles and steam/ heritage railways.

VisitEngland

Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – facilities provision by attraction category



Retail facilities are provided by most attractions, with over half of all sectors aside from Country Parks having a shop.

There is more variation in the provision of catering facilities between sectors. Almost all farms (92%) have a café/ restaurant, but less than half of attractions in many sectors offer catering.

As we would expect, play/ activity areas for children are more common in family orientated sectors, such as farms and leisure/ theme parks.

Costumed interpreters largely remains the domain of the heritage sector – in particular historic houses/ castles and visitor/ heritage centres. However over a fifth of museums and art galleries also now use actors/ interpreters to bring the experience to life.

Membership is commonly offered at wildlife attractions/ zoos, steam/ heritage railways, gardens, historic houses/ castles and farms, with around three quarters or more of attractions in these sectors offering membership.

VisitEngland

Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – by visitor volume

% offering	Visit Volume				
	Under 10k	10k-20k	20k-50k	50k-100k	Over 100k
Online					
Website	66	85	84	87	87
Online booking	12	27	25	26	44
Events					
Temporary exhibition	35	46	46	46	54
Public events	42	58	65	60	71
Venue hire	18	37	43	42	63
Corporate events	10	23	22	26	53
Facilities					
Retail shop	52	71	75	78	82
Member scheme	45	59	59	61	68
Activity/ play area	20	38	43	48	63
Café / restaurant	26	32	57	73	86
Costumed interpretation	10	19	19	24	25

The majority of sites across all categories now have their own website, although a notable minority do not – in particular amongst attractions with fewer than 10,000 visitors where a third of sites have not yet taken this step.

Online booking remains the exception rather than the norm at all but the largest sites (with over 100,000 visitors), but 2012 saw an substantial increase in the proportion of smaller sites providing this facility – more than doubling in the case of sites with under 10,000 visitors (from 5% to 12%) and with 10,000-20,000 visitors (from 11% to 27%).

Provision of other facilities increases fairly steadily in line with attraction size.

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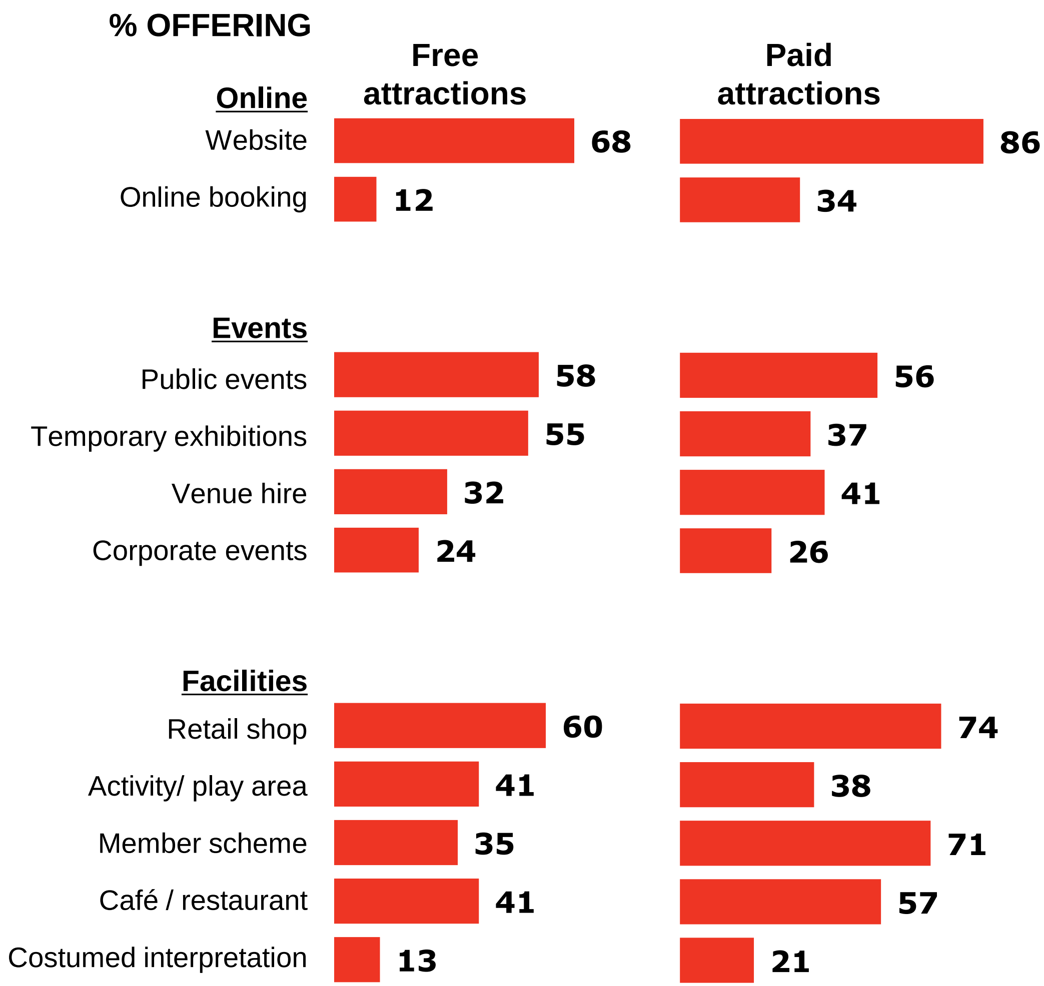
Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – by admission charge



Paid attractions tend to be more established online and are more likely to offer venue hire, a shop and catering onsite.

Paid attractions are also more likely to invest in costumed interpretation to bring their experience to life.

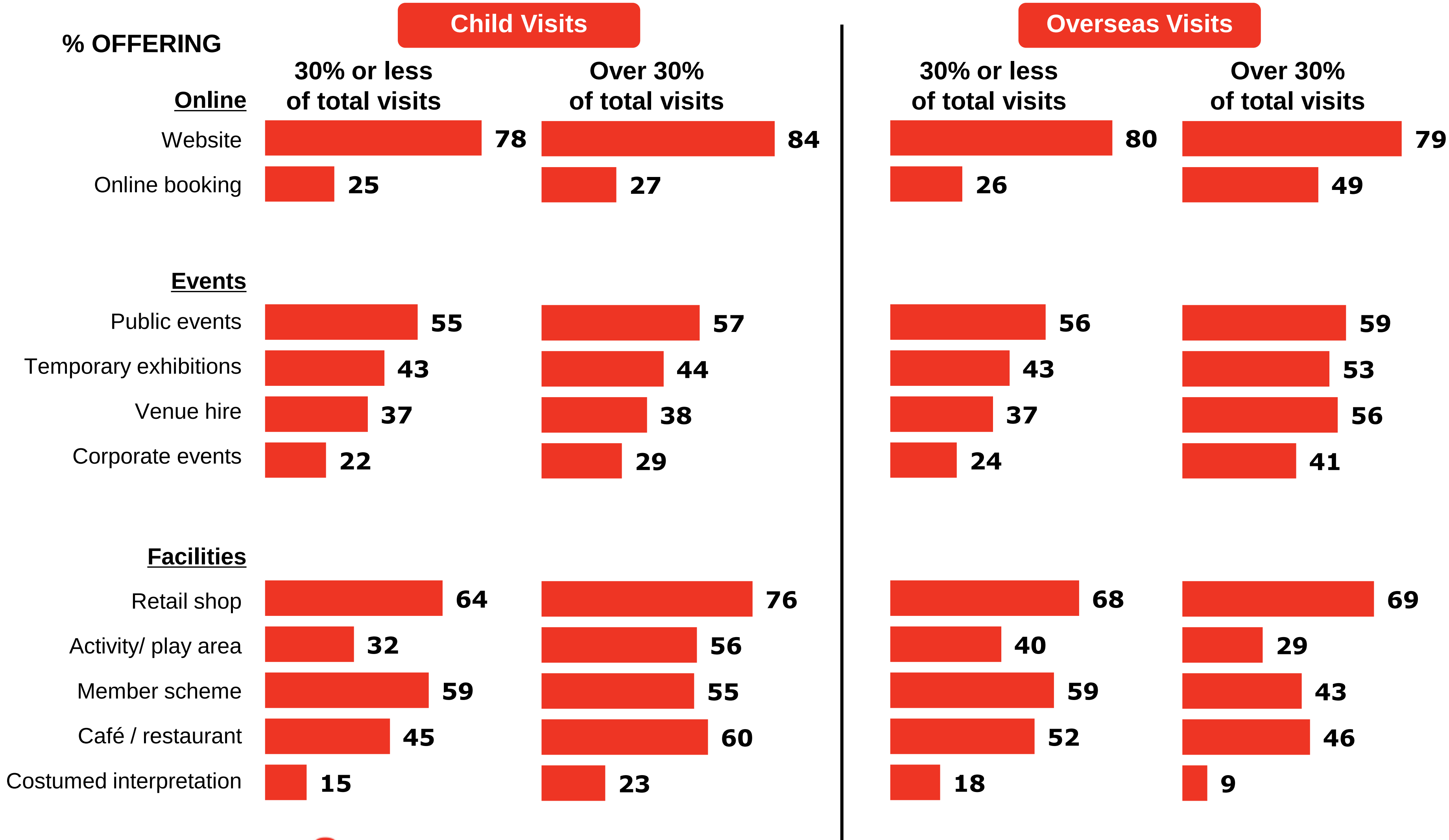
Although membership schemes are more relevant for paid attractions, over a third of free attractions also offer membership. It is likely that this membership provides free into temporary exhibitions, which are offered by over half of free attractions. Temporary exhibitions are less common at sites that charge admission to the site itself.

Other facilities are offered equally by free and paid attractions.

VisitEngland

Base: Any answering services question in 2012 (1,346)

Provision of services trends 2012 – by child / overseas visitors



VisitEngland

Base: Any answering services question in 2012 (1,346)

Impact of public events - summary

	Hold public events?	
2010 / 11 change in…	Yes	No
Total visitor admissions	-1%	0%
Gross revenue	+4%	0%

Those attractions that hold public events continued to report stronger increases in gross revenue in 2012.

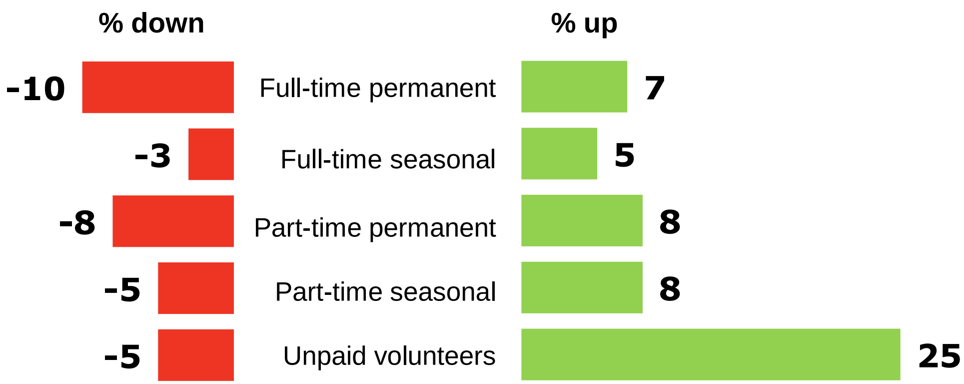
Events do not seem to help total visitor admissions during regular opening hours, but do provide an additional revenue stream, which boosts revenue.

Gross revenue increased by +4% among those holding public events compared with no change among those holding such events.

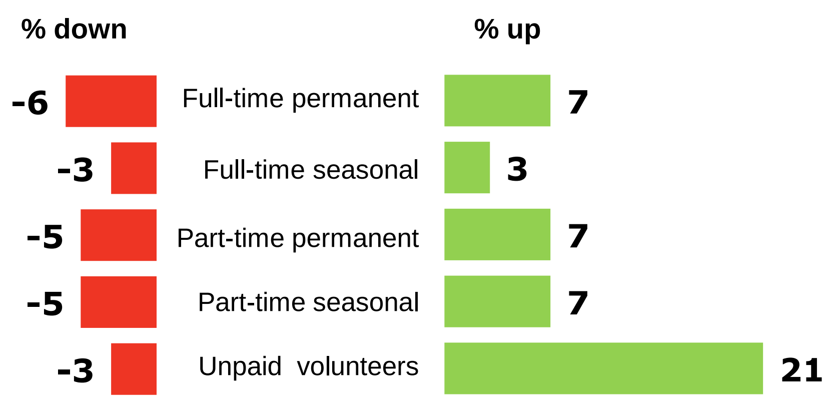
Employment trends

Employment trends

Change in employees since 2011



Anticipated change in employees in 2013



Proportions of attractions employing any of the following employees in 2012:

- 79% full-time permanent
- 43% full-time seasonal
- 78% part-time permanent
- 54% part-time seasonal
- 84% unpaid volunteers

In the current challenging financial climate there continues to be a shift towards employees from the voluntary sector. Attractions predict this to continue during 2013.

This has offset another decline in full time permanent employees within the sector, although this decline is predicted to be arrested in 2013.

Base: All answering employment questions

Employment trends – unpaid volunteers summary (2011 to 2012)

% down	2011 to 2012	% up	% any volunteers in 2012
-3	Country parks	36	82
0	Farms	22	66
-6	Gardens	26	76
-6	Historic houses / castles	30	89
-2	Other historic properties	18	74
-5	Leisure / theme parks	14	41
-5	Museums / art galleries	25	89
-4	Steam / heritage railways	30	94
-6	Visitor / heritage centres	25	72
-3	Wildlife attractions / zoos	24	91
-4	Workplaces	22	70
-6	Places of worship	22	96
0	Other	12	58

% down		% up	% any volunteers in 2012
-5	Free	25	82
-4	Paid	24	78

% down	2011 to 2012	% up	% any volunteers in 2012
-4	Under 20k visits	21	87
-5	20k-50k visits	24	79
-5	50k-200k visits	29	82
-5	Over 200k visits	30	81

Whilst unpaid volunteers are up across the board, they are most likely to have increased at the larger attractions.

Volunteering is just as likely to have increased at paid attractions as at those which are free admission.

Country parks, steam railway and historic houses/ castles are the categories most likely to have reported increases in volunteers in 2012.

VisitEngland™

Base: All answering employment questions (949)

Employment trends – unpaid volunteers summary (2013 predictions)

% down	2013 predictions	% up	% any volunteers in 2013
0	Country parks	33	82
0	Farms	16	71
-8	Gardens	21	81
-4	Historic houses / castles	26	89
-4	Other historic properties	23	79
0	Leisure / theme parks	11	47
-4	Museums / art galleries	20	90
0	Steam / heritage railways	30	96
-1	Visitor / heritage centres	28	82
-3	Wildlife attractions / zoos	19	93
0	Workplaces	26	70
0	Places of worship	18	96
-3	Other	4	58

% down		% up	% any volunteers in 2013
-4	Free	22	87
-3	Paid	20	84

% down	2013 predictions	% up	% any volunteers in 2013
-3	Under 20k visits	19	88
-3	20k-50k visits	18	80
-3	50k-200k visits	24	85
-7	Over 200k visits	27	82

The trend towards unpaid volunteers is predicted to continue again in 2013, with larger attractions still driving this increase.

Country parks, steam / heritage railways and visitor/ heritage centres are the attraction categories most likely to predict the number of volunteers to increase in 2013.

VisitEngland™

Base: All answering employment questions (962)

Employment trends – full time permanent employees summary (2011-2012)

% down	2011 to 2012	% up	% any FT perm in 2012
-27	Country parks	5	90
-3	Farms	8	100
-8	Gardens	8	95
-10	Historic houses / castles	8	92
-6	Other historic properties	4	57
-23	Leisure / theme parks	18	100
-12	Museums / art galleries	6	69
-8	Steam / heritage railways	4	68
-2	Visitor / heritage centres	6	73
-6	Wildlife attractions / zoos	6	90
-9	Workplaces	14	95
-2	Places of worship	12	71
-9	Other	7	83

% down		% up	% any FT perm in 2012
-12	Free	5	74
-8	Paid	9	83

% down	2011 to 2012	% up	% any FT perm in 2011
-5	Under 20k visits	3	60
-10	20k-50k visits	10	91
-14	50k-200k visits	9	96
-16	Over 200k visits	14	96

Country parks are the category that are most likely to have made cuts to full time staff numbers, counter-balanced by the increase in unpaid volunteers.

Leisure/ theme parks seem to be polarised in their staffing strategy with almost a quarter cutting back, while just under a fifth grew the number of full time permanent staff on their books.

Free attractions are more likely to have shed than taken on additional full-time permanent staff.

There is a fairly balanced pattern by attraction size with nearly as many attractions taking on additional staff as those cutting back.

Base: All answering employment questions (855)

Employment trends – full time permanent employees summary (2013 predictions)

% down	2013 predictions	% up	% any FT perm in 2013
-14	Country parks	10	90
-6	Farms	11	97
-6	Gardens	6	95
-4	Historic houses / castles	11	92
-4	Other historic properties	4	61
0	Leisure / theme parks	14	100
-8	Museums / art galleries	5	71
-4	Steam / heritage railways	20	68
-7	Visitor / heritage centres	3	67
-3	Wildlife attractions / zoos	12	93
-5	Workplaces	5	95
-5	Places of worship	5	75
-5	Other	5	86

% down		% up	% any FT perm In 2013
-8	Free	5	76
-5	Paid	9	83

% down	2013 predictions	% up	% any FT perm in 2013
5	Under 20k visits	4	62
7	20k-50k visits	8	93
10	50k-200k visits	12	97
11	Over 200k visits	9	95

Overall the outlook for 2013 staffing is slightly more positive, with as many or more attractions expecting full time permanent staffing levels to increase as anticipate cuts.

In particular, permanent staffing levels are expecting to increase in the steam/ heritage railways, leisure/ theme parks and wildlife attractions categories.

An improvement in staffing levels was anticipated by these categories last year and didn't necessarily transpire, but optimism is stronger this year than last.

There are three categories with predicted risk of further full time staffing cuts – country parks, visitor/ heritage centres and museums and galleries.

VisitEngland™

Base: All answering employment questions (849)

VisitEngland

Attracting visitors to the area

Attracting visitors to the area

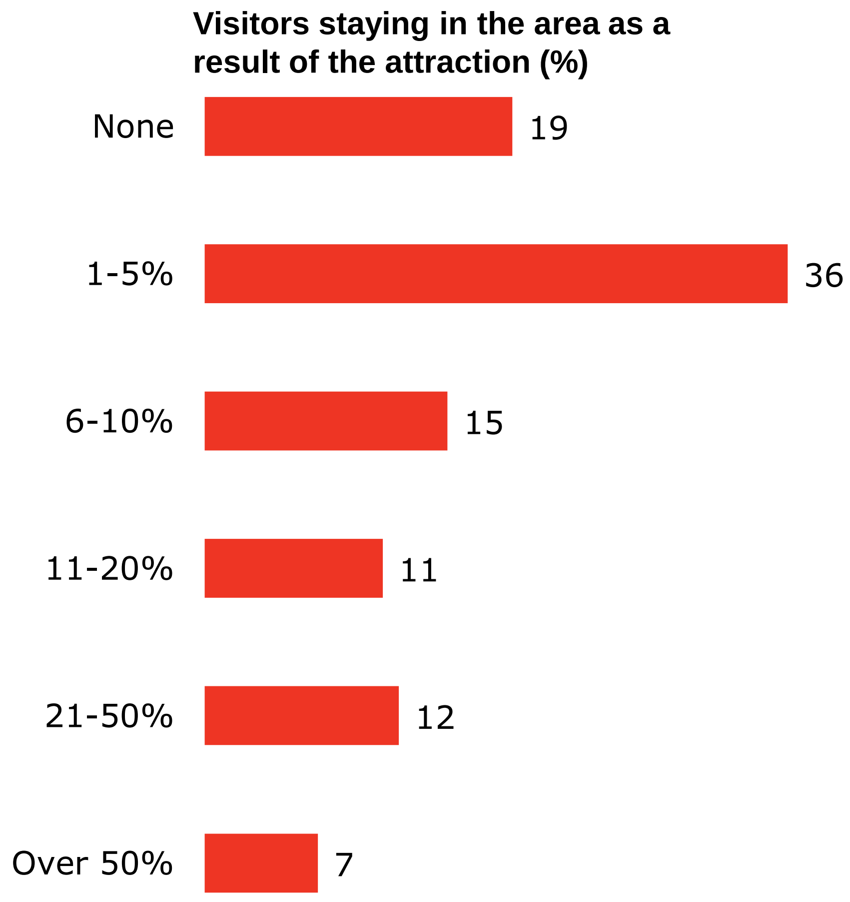
In 2013 we added a question to the Visits to Visitor Attractions survey to try to tease out the ‘pull’ of attractions to an area.

‘Thinking just about your visitors who are staying away from home in the area, what percentage of these visitors would you estimate decided to visit the area mainly because of your attraction?‘

These results are unaudited, and we don’t know what sites based this information on – whether it is data from other surveys they run, or simply ‘gut feel’.

Further analysis will be conducted on this data in order to understand if and how the survey could be used to understand the economic impact of attractions.

Attracting visitors to the area



Around four in five sites believe they serve to attract at least some non-local visitors to the area.

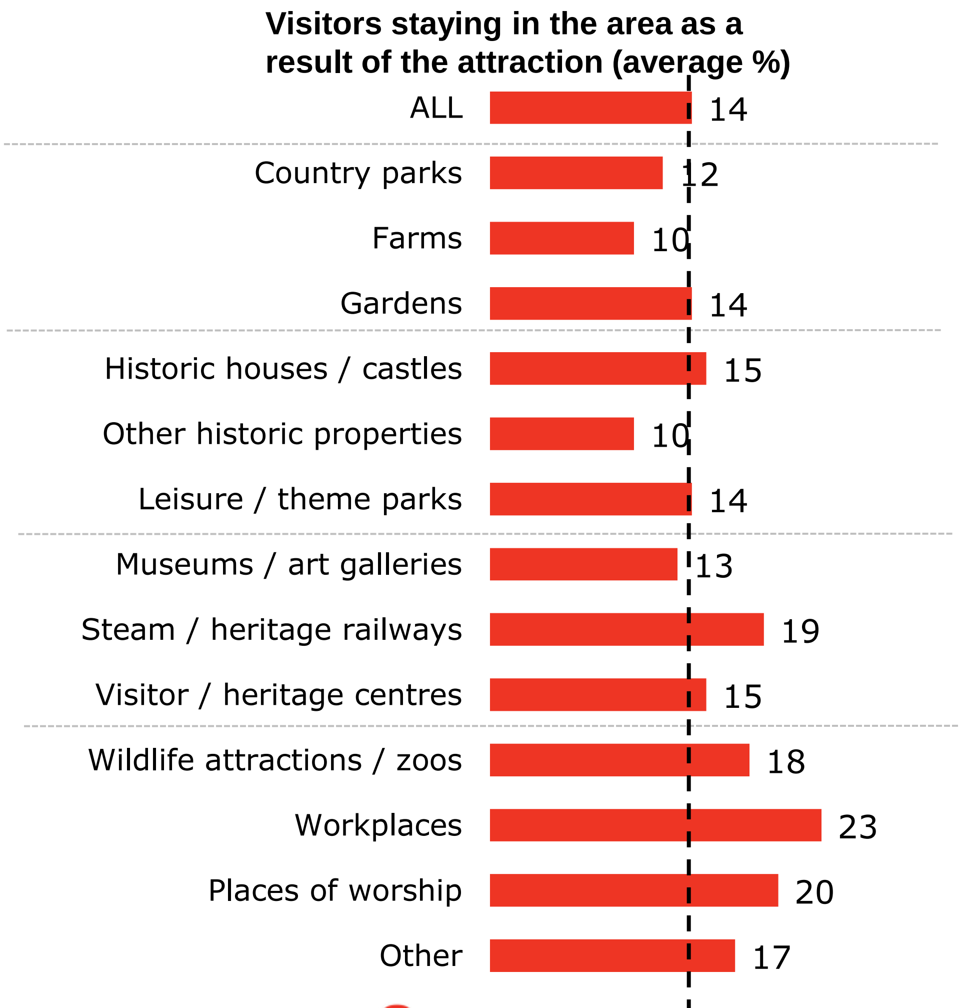
On average, 14% of visitors are estimated to have been attracted to the area by attractions.

This calculation takes into account the actual number of non-local visitors to each site, and sites' estimations of what percentage of their visitors decided to visit the area mainly because of their attraction.

VisitEngland™

Base: All attractions responding (897)

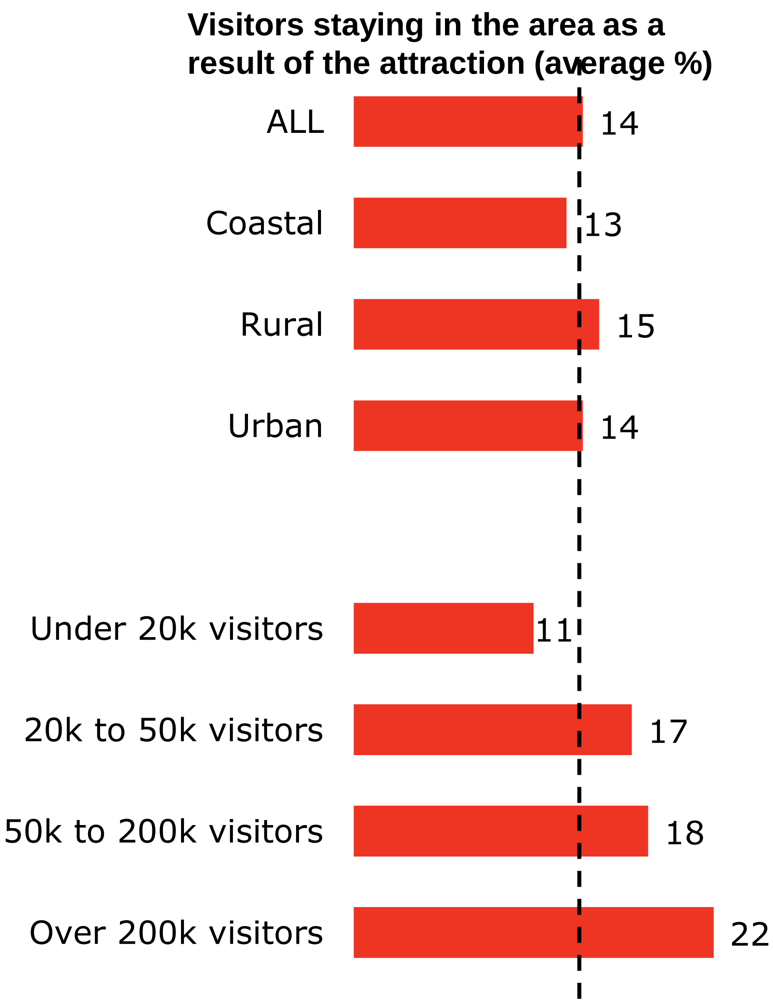
Attracting visitors to the area – by attraction type



Workplaces and place of worship appear to have the biggest draw for non-local visitors, followed by steam/ heritage railways and wildlife attractions.

Base: All attractions responding (897)

Attracting visitors to the area – by destination type & attraction size



As we would expect, the larger the attraction, the greater its gravitational pull.

Sites receiving more than 200,000 visitors a year reported figures that suggest they attract twice as many visitors to the area as attractions with fewer than 20,000 visitors.

VisitEngland

Base: All attractions responding (897)

Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2012

VisitEngland bdrc continental

Please help VisitEngland and local Destination Management Organisations establish trends in the attractions' sector in 2012 by taking part in our major annual survey, conducted by BDRC Continental. **ALL ATTRACTIONS COMPLETING THIS QUESTIONNAIRE WILL RECEIVE A PERSONALISED REPORT BENCHMARKING THEIR PERFORMANCE.**

All information you provide in this questionnaire will be treated in strictest confidence (please see Section 5.1 to grant permission to publish visitor numbers)

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by 23rd April 2013 in the pre-paid envelope provided. Please refer to the enclosed guidelines when completing the questionnaire.

To provide your response more quickly, you can complete this questionnaire ONLINE at www.visitenglandattractions.com. Simply login using the User Name and Password details printed below.

If any of the contact information printed below is incorrect or missing, please write in the correct details.

Contact Name: Tel: ID:
E-mail: Name of Attraction: Website:
Position: User Name:
Address:
Password:
Serial:

N.B. If the questionnaire should be sent to a different address, please supply separate details.

SECTION ONE – ATTRACTION DETAILS

1.1 In 2011, your main attraction category was:
Is this correct? Yes ☐ No ☐ If no or missing, please tick below the main category to be used for analysis.

Castle / Fort	☐	Museum and / or Art Gallery	☐
Country Park	☐	Farm / Rare Breeds / Farm Animals	☐
Distillery / Vineyard or Brewery	☐	Nature Reserve / Wetlands / Wildlife Trips	☐
Garden	☐	Safari Park / Zoo / Aquarium / Aviary	☐
Heritage / Visitor Centre	☐	Steam/Heritage Railway	☐
Historic House / House and Garden / Palace	☐	Other Historic/Scenic Transport Operator	☐
Historic Monument / Archaeological Site	☐	Industrial/Craft Workplace	☐
Place of Worship (still in use)	☐	Science / Technology Centre	☐
Other Historic Property	☐	Other *(Please specify below)*	☐
Leisure / Theme Park	☐		

1.2 Which of these best describes the location of your attraction? Coastal ☐ Rural ☐ Urban ☐

SECTION TWO – VISITORS

2.1 For 2011, your organisation provided us with total visitor numbers (paid and free) of:
Is this correct? Yes ☐ No ☐
If no or missing, please indicate the correct 2011 visitor number: ☐,☐☐☐,☐☐☐

2.2 What were your visitor numbers during the 2012 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).
Total visitor numbers (paid and free) ☐,☐☐☐,☐☐☐ Are these numbers: Exact? ☐ An Estimate? ☐

2.3 What percentage of total visitors in 2012 (paid and free) fell into each category?
Adults ☐☐☐ %
Children ☐☐☐ %
TOTAL 100%

2.4 For 2011, your organisation provided us with a total number of school children visits of:
Approximately how many school children visited your attraction as part of an organised group in 2012?
Number of school children ☐,☐☐☐,☐☐☐ Is this number: Exact? ☐ An Estimate? ☐

2.5 Did you charge for admission to the main attraction in 2012? Yes ☐ No ☐

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2012 (including VAT): Adult £☐☐.☐☐p (£ in 2011) Child £☐☐.☐☐p (£ in 2011)

2.7 Origin of visitors:
(a) For 2011, your organisation provided us with a percentage of visitors from overseas of %
i) What percentage of total visitors in 2012 do you estimate were from overseas? ☐☐☐ %
ii) Compared with 2011, was the number of visitors from overseas in 2012: Up ☐ Down ☐ Similar ☐

(b) For 2011, your organisation provided us with a percentage of visitors living locally/within day trip distance of %
i) What percentage of total visitors in 2012 do you estimate lived locally or within day trip distance of your attraction? ☐☐☐ %
ii) Compared with 2011, was the number of visitors living locally or within day trip distance in 2012:
Up ☐ Down ☐ Similar ☐

2.8 Thinking just about your visitors who are staying away from home in the area, what percentage of these visitors would you estimate decided to visit the area mainly because of your attraction? ☐☐☐ %

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue
(a) How did the attraction's gross revenue in 2012 compare with 2011? Up ☐ Down ☐ Similar ☐
(b) What was the percentage increase / decrease? ☐☐☐ %

3.2 Which of the following did your main attraction offer in 2012?

Membership scheme (Members/Friends/Season Tickets)	☐	Corporate events	☐	Public venue hire (e.g. weddings)	☐
Public events (outside usual operation)	☐	Retail shop	☐	Café/restaurant	☐
Costumed interpreters	☐	Website	☐	Online booking facility (tickets, events)	☐
Activity/play area for children	☐	Temporary exhibitions	☐	None of these	☐

3.3 Compared with 2011, was expenditure on marketing activities in 2012: Up ☐ Down ☐ Similar ☐

3.4 Which of the following digital communications did your main attraction offer in 2012?

Facebook page	☐	Twitter account	☐	Flickr page	☐	YouTube	☐	Other social media	☐
Online blogs	☐	Mobile Apps	☐	E-newsletter	☐	Mobile website	☐	None of these	☐

3.5 In 2012, was your main attraction..............?
Open all year round ☐ Closed for part of the year – regular seasonal closure ☐ Closed for part of the year – other reason e.g. refurbishment, repairs ☐

SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2011, was the number of people employed in any tourism-related activities in the attraction in 2012 (including yourself, working owners and self employed)...?:
Full-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Full-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Part-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Part-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Unpaid volunteers: Up ☐ Down ☐ Similar ☐ None ☐

4.2 And compared with 2012, do you anticipate the number of people employed in any tourism-related activities in the attraction in 2013 to be:
Full-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Full-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Part-time permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Part-time seasonal:* Up ☐ Down ☐ Similar ☐ None ☐
Unpaid volunteers: Up ☐ Down ☐ Similar ☐ None ☐

SECTION FIVE - HOW CAN WE USE YOUR DATA?

The information you provide in this survey will be combined with results from other attractions and used to assess trends in the attractions sector and to inform tourism development and planning locally and nationally.

All data will be held in strict confidence by BDRC Continental and the staff at VisitEngland and local Destination Management Organisations. However, we do encourage attractions to provide permission to publish visitor numbers which could help to raise the profile of your organisation.

5.1 Can we publish your total visitor numbers (Q2.2)? Yes ☐ No ☐

5.2 Arts Council England (ACE) and English Heritage use the museum/art gallery and heritage data from this survey. Can we pass on data from your attraction for this purpose?
Yes to ACE ☐ Yes to English Heritage ☐ No to both ☐ Not a Museum/Art Gallery/Heritage attraction ☐

I declare that the information provided on this form is true to the best of my knowledge.

Signed: Date:
Name: (BLOCK CAPITALS) Job title:

If you would prefer to take part in this survey online in future, please write in your Email Address:

Thank you for participating in this survey. Please return the completed questionnaire by 23rd April 2013 in the pre-paid envelope. No stamp is required. If you wish to contact someone about the survey then please do not hesitate to contact: Abbie McPhie (VisitEngland, t: 0207 578 1465, e: annualattractionsurvey@visitengland.org) or Emma Hughes (BDRC Continental, t: 0207 400 1014, e: emma.hughes@bdrc-continental.com).

VisitEngland