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.

No part of this publication may be reproduced for commercial purposes without previous written consent of VisitEngland. Extracts may be quoted if the source is acknowledged.

Statistics in this report are given in good faith on the basis of information provided by proprietors of attractions. VisitEngland regrets it cannot guarantee the accuracy of the information contained in this report nor accept responsibility for error or misrepresentation.

Published by VisitEngland (incorporated under the 1969 Development of Tourism Act as the British Tourist Authority) © 2013 British Tourist Authority (trading as VisitBritain).

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

August 2013
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

Response by attraction category

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

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.

A review of the sample used for the Survey of Visits to Visitor Attractions was undertaken prior to fieldwork this year. Please see the full report for details.
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.
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.
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.
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).

**VisitEngland™**

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%.

<table>
<thead>
<tr>
<th>Category</th>
<th>All attractions average (3%)</th>
<th>2010/11 change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country parks</td>
<td>-2</td>
<td>+4</td>
</tr>
<tr>
<td>Farms</td>
<td>0</td>
<td>+5</td>
</tr>
<tr>
<td>Gardens</td>
<td>-2</td>
<td>+9</td>
</tr>
<tr>
<td>Historic houses / castles</td>
<td>-4</td>
<td>+6</td>
</tr>
<tr>
<td>Other historic properties</td>
<td>0</td>
<td>+9</td>
</tr>
<tr>
<td>Leisure / theme parks</td>
<td>-1</td>
<td>+2</td>
</tr>
<tr>
<td>Museums / art galleries</td>
<td>2</td>
<td>-1</td>
</tr>
<tr>
<td>Steam / heritage railways</td>
<td>-5</td>
<td>-3</td>
</tr>
<tr>
<td>Visitor / heritage centres</td>
<td>-2</td>
<td>+2</td>
</tr>
<tr>
<td>Wildlife attractions / zoos</td>
<td>-4</td>
<td>+9</td>
</tr>
<tr>
<td>Workplaces</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Places of worship</td>
<td>-2</td>
<td>+7</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>+3</td>
</tr>
</tbody>
</table>
Index of visits to attractions – sectors outperforming market

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

- TOTAL ENGLAND ATTRACTIONS
- Historic properties
- Leisure / theme parks
- Steam / heritage railways
- Wildlife attractions / zoos

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.
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.
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.
## Visitor admission trends 2012 – by visitor origin

### Overseas visitors

<table>
<thead>
<tr>
<th>Compared with 2011 (%)</th>
<th>Up</th>
<th>Similar</th>
<th>Down</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13</td>
<td>76</td>
<td>11</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Compared with 2011 (%)</th>
<th>Up</th>
<th>Similar</th>
<th>Down</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13</td>
<td>77</td>
<td>10</td>
</tr>
</tbody>
</table>

**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.
Adult admission charge trends 2012 – by attraction category

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

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.
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.
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.
Digital communications offered

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).

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

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

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.
Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2012

Please help VisitEngland and local Destination Management Organizations 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 (see section 6.1 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 20th 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.visitenglandonline.com. Simply log in 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: [Name of Attraction]
Address: [Address of Attraction]
Postcode: [Postcode]
Website: [Website]

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

N.B. If the questionnaire is not signed by a representative of the attraction, please indicate your signature below.

SECTION ONE — ATTRACTION DETAILS

1.1 In 2011, your main attraction category was:

[ ] Garden / Park
[ ] Country Park
[ ] Historic House / House and Garden / Palace
[ ] Historic Monument / Archaeological Site
[ ] Place of Worship / Castles
[ ] Other Historic Property
[ ] Leisure / Theme Park

1.2 Which of these best describes the location of your attraction? [ ] Coastal [ ] Rural [ ] Urban [ ] Other (please specify below)

SECTION TWO — VISITORS

2.1 For 2011, your organisation provided us with total visitor numbers (paid and free) of: [ ] is this correct? [ ] No [ ] If no missing, please indicate the correct 2011 visitor numbers.

2.2 What were your visitor numbers during the 2012 Calendar Year? Please exclude special events outside normal opening hours or any private events.

Total visitor numbers (paid and free) are these numbers: [ ] is this correct? [ ] No [ ] If no missing, please indicate the correct 2012 visitor numbers.

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: [ ] is this correct? [ ] No [ ] If no missing, please indicate the correct 2011 number of school children visits. [ ] This number: [ ] is this number: [ ]

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 (excluding VAT) [ ] Adult [ ] Child [ ]

2.7 Origin of visitors:

(a) For 2011, your organisation provided us with a percentage of visitors from overseas of: [ ] is this correct? [ ] No [ ] If no missing, please indicate the correct 2011 number of overseas visitors.

(b) Compared with 2011, was the number of visitors from overseas in 2012: [ ] Up [ ] Down [ ] Similar

SECTION THREE — OPERATION/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?

[ ] Corporate events [ ] Public venue for hire [ ]
[ ] Disabled access for visitors [ ] Other

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 [ ] Other social media
[ ] Blogs [ ] Mobile Apps [ ] Other

3.5 In 2012, was your main attraction busy: [ ] Open all year round [ ] Closed for part of the year — without annual closure [ ] Closed for part of the year — annual closure

SECTION FOUR — HUMAN RESOURCES

4.1 Compared with 2011, was the number of people employed in any tourism-related activities in 2012 (including yourself, working owners and self-employed)?: [ ] Up [ ] Down [ ] Similar

4.2 Compared with 2012, do you anticipate the number of people employed in any tourism-related activities in the 2011 will be?: [ ] Up [ ] Down [ ] Similar

4.3 And compared with 2012, do you anticipate the number of people employed in any tourism-related activities in the attraction will be?: [ ] Up [ ] Down [ ] Similar

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

6.1 Can we publish your total visitor numbers (2012)? [ ] Yes [ ] No

6.2 Are Council England (ACE) and English Heritage use the museum gallery and heritage data from this survey. Can we pass on data from your attraction for this purpose?

7.1 I agree that the information provided on this form is the best of my knowledge.

Signed: [Signature]
Name: [Name]
Date: [Date]

If you would like to take part in this survey online in future, please fill in your email address.

Thank you for participating in the survey. Please return the completed questionnaire by 20th April 2013 in the pre-paid envelope. No stamp is required. If you want to contact someone about the survey, please do not hesitate to contact Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 © Adele Gladstone (AG@BDRC.com), 2011 07011 456 ©