

Tourism Business Monitor

Visitor Attractions Report

July 2012



Background, objectives and research method

Tourism Business Monitor designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

Amalgamation of two previous surveys discontinued at end of 2011:

- England Attractions Monitor
- Accommodation Business Confidence Monitor

Telephone survey conducted five times per year immediately following key tourism periods among:

- c. 500 accommodation establishments (c. 250 serviced / c. 250 non-serviced), including mix by region, establishment size and hotels / guest houses / B&B / self-catering / caravan and campsites.
- c. 300 visitor attractions including mix by region, attraction type, size (measured by annual visitor admissions) and free / paid admission.

Questions on 'hot topics' included on a periodic basis.

July 2012 fieldwork: 16th to 24th July 2012, reviewing the period after the jubilee bank holiday weekend until mid July

June 2012 fieldwork: 11th to 15th June 2012, reviewing May and early June period, including the Jubilee Bank Holiday weekend.

Easter 2012 fieldwork: 16-23 April 2012, reviewing January to April period

Attractions sample targets (total 300)

Region	
East Midlands	29
East of England	41
London	18
North East	15
North West	32
South East	53
South West	53
West Midlands	24
Yorkshire	35

Size (visitors p.a)	
Over 100k	57
50-100k	35
20-50k	57
Under 20k	152

Type	
Historic	54
Museum/gallery	78
Other indoor	57
Other outdoor	111

Admission charge	
Free	129
Paid	171

This is the target sample for each wave, reflecting the profile of attractions in England. There are minor variations wave on wave, which are corrected by weighting the profile if needed.

One month on from our post Jubilee survey, the situation for visitor attractions does not appear to have improved.

Well over half of attractions report that June/ July numbers are down compared with 2011, and satisfaction levels within the industry have followed a similar trajectory.

In line with this we see the overall year to date picture for 2012 weakening: 57% have seen a decline since 2011, with a 6% drop in visitor numbers

The retraction in visitor number is driven by the domestic market and affects all attraction types.

Optimism remains for the summer holidays, but attractions are more cautious than they were during the first half of the year: 16% are 'very confident', compared with 29% at Easter. As such, many attractions (29%) are seeking to promote themselves through special offers.

The Olympic torch relay has had a positive short term impact on local business, but any longer term impact is expected to be marginal. This does not seem to have stimulated positive opinion towards the Olympics; overall (net) feeling is now negative, having declined further since June.

Instead, hopes are pinned on the weather picking up and an injection of business associated with school summer holidays.

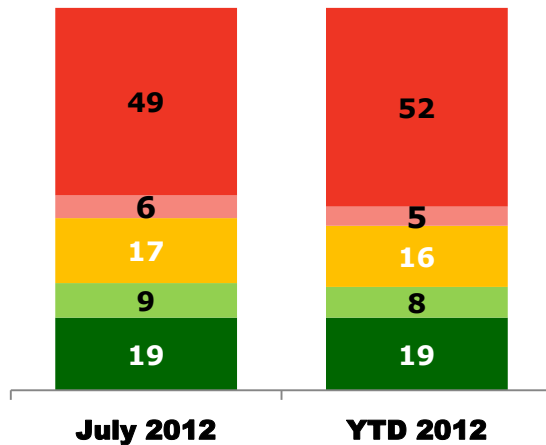
Business Dashboards



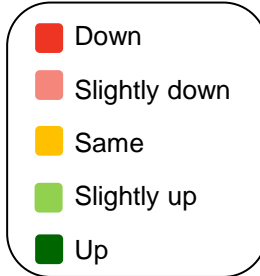
Business Performance Dashboard: Attractions

VISITOR NUMBERS

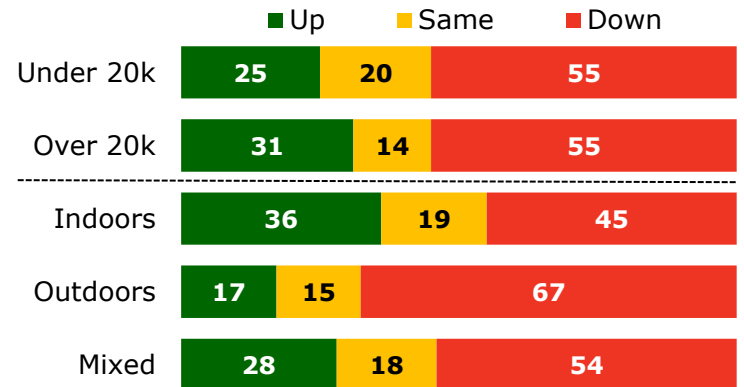
Visitor numbers (%)



Versus same period previous year...

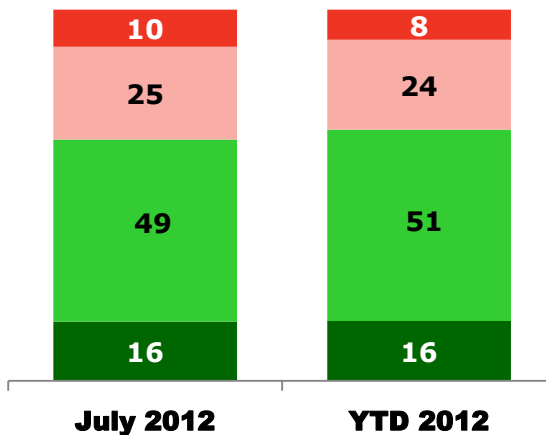


Visitor numbers versus June-July 2011(%)



SATISFACTION

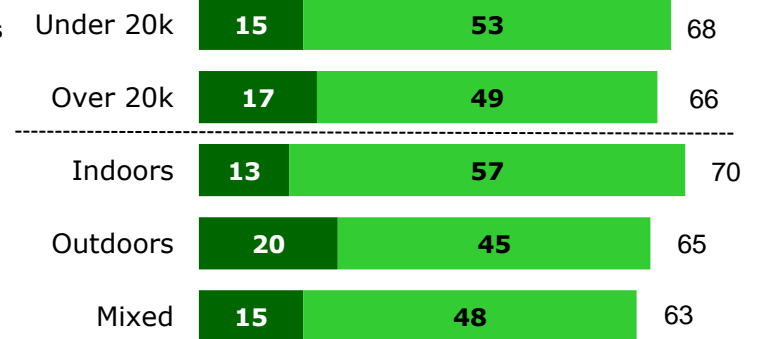
Satisfaction (%)



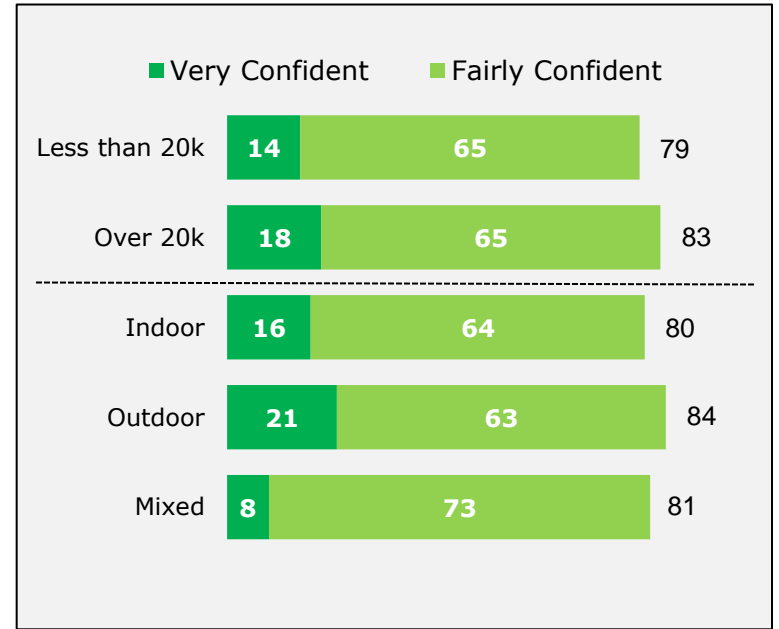
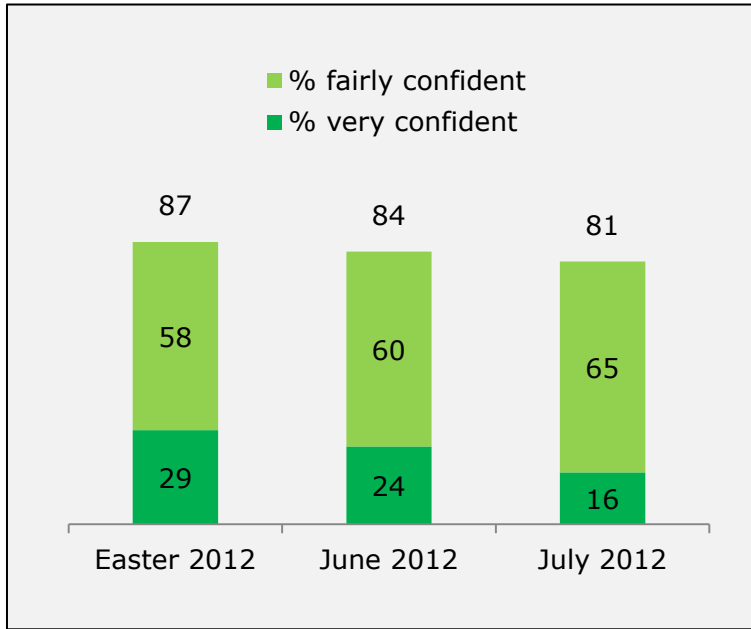
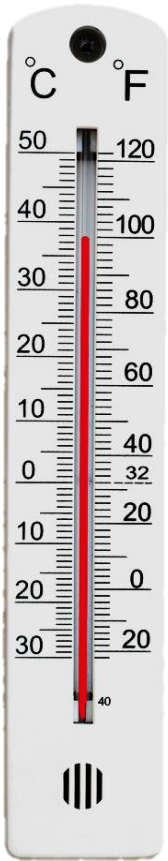
Satisfied with business performance...



Satisfaction with June-July 2012 Performance (%)



Business Confidence Dashboard: Attractions



Survey conducted:	Easter 2012	June 2012	July 2012
Period asked about:	Until after Jubilee bank hol	Until start of summer hols	Until end of summer hols

Visitor profile



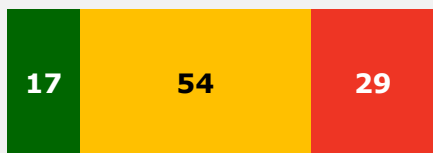
Changing Visitor Profile (year-to-date vs. previous year): Attractions



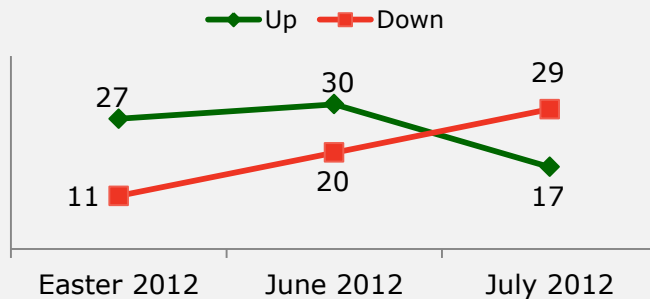
NET:
Up - Down



July 2012



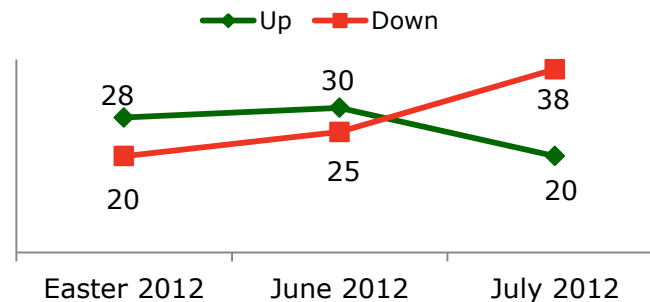
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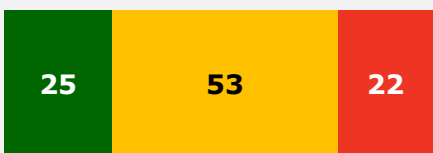
July 2012



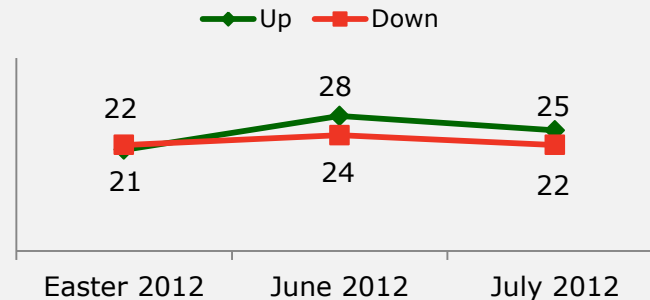
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July 2012



+3

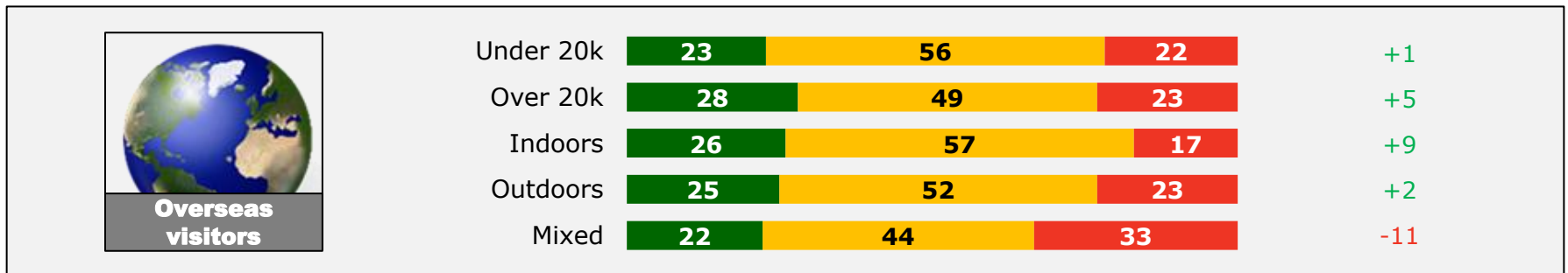
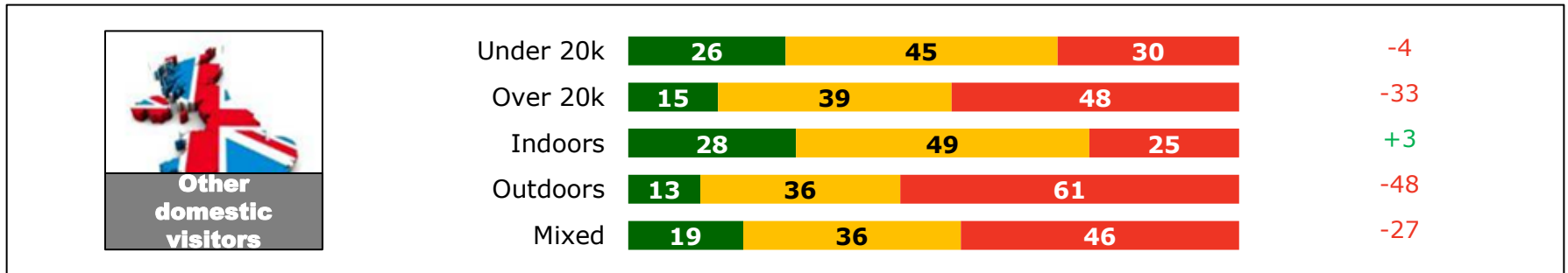
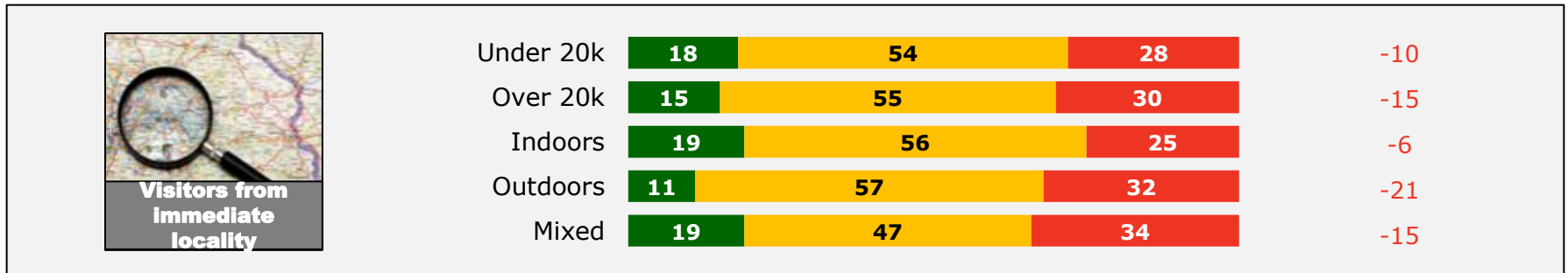


Changing Visitor Profile (year-to-date vs. previous year): Attraction type

While local and other domestic business is down, especially for fully or partially outdoor attractions, overseas custom seems to be slightly improved on last year.



NET:
Up - Down

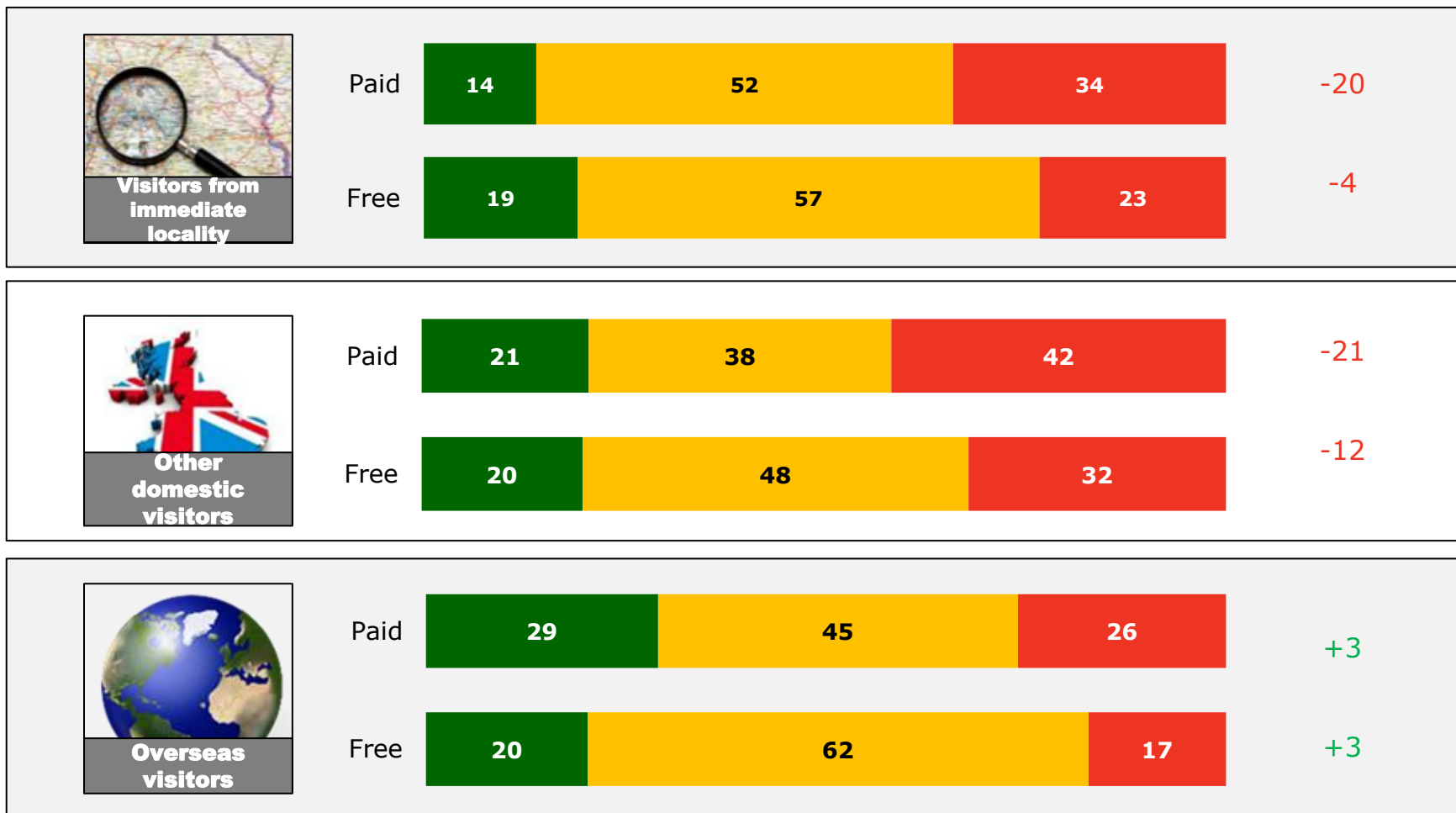


Changing Visitor Profile (year-to-date vs. previous year): Charging

As may be expected in the poor economic climate, free attractions are faring better than paid attractions, particularly with visitors from the immediate locality.

■ Up
 ■ Same
 ■ Down

**NET:
Up - Down**

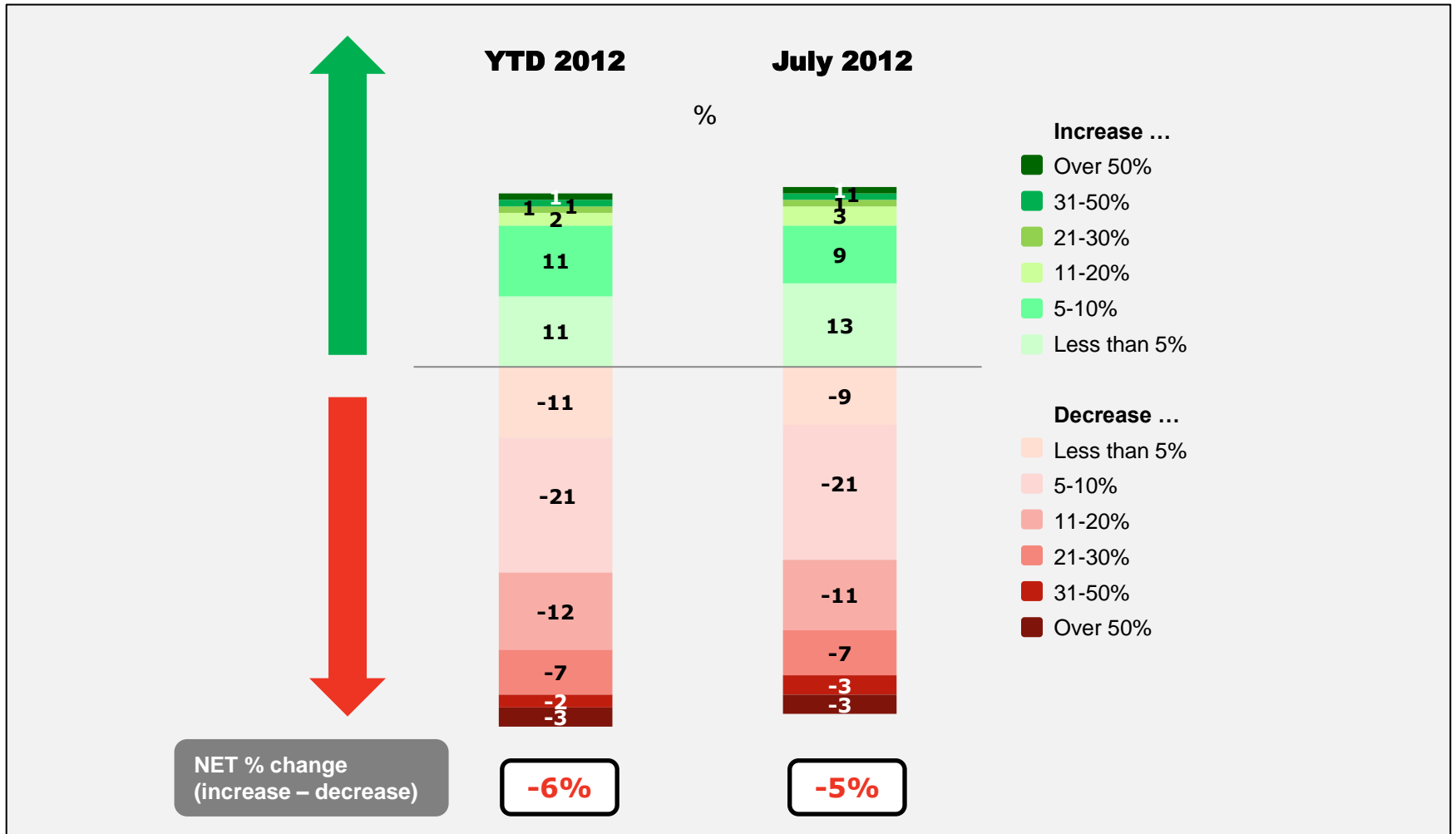


Past performance



Visitor Numbers: Year-on-year changes (%)

Visitor numbers are reported as down by 5% in total, but 28% of attractions have managed to buck this trend and increase visitor numbers compared with the same period last year.



Positive verbatim comments on business performance

“

We've got the quality of the exhibition. We are more accessible and have a better quality of programmes and events

We showed our wares in a special exhibition. It increased awareness so we got more people to visit

We appeared on the tour guides "guide of the arts" for radio 2 and that upped numbers

The weather was really bad which was very good for our indoor attraction

The weather has been quite helpful/It's an indoor attraction and the constant rain has been helpful

We have had special offers on and the shop has been going well compared to last year

Well the weather has not been brilliant so people have been doing more of our indoor activities which is good for us

The main coach now stops in the centre of town and has had a tremendous impact on visitor numbers. People are finding us better and we are also improving our website presence

I think that we've done better in the recession. I say that because people are not travelling abroad as much but they still want the same experience which we feel that we offer

”

Negative verbatim comments on business performance

“
We have been flooded out three times. Fortunately we haven't lost any stock but we lose an extra day to wash the floors and clean the mud; this is the reason we have lost so many visitors

We are on the high street so when the weather is bad there are less people coming in

People have stayed away because of the weather, it's been awful. The cost of fuel is another factor - Fuel prices are expensive so people will not come

Visitor numbers are down because of the weather and we do outside displays and they have been cancelled because of the weather

My business performance is not helped by the Olympics because the Olympics committee keep telling everyone to stay away from London and that the transport will be chaos

If it's wet people will not come to see the garden, they would go inside

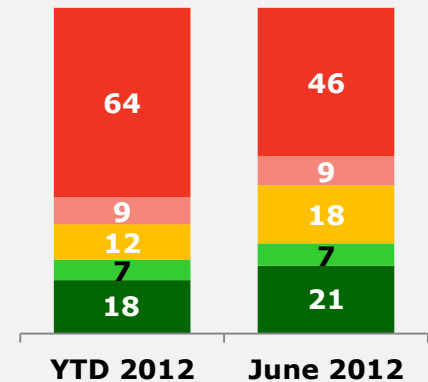
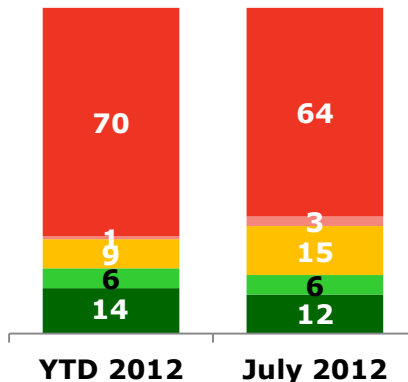
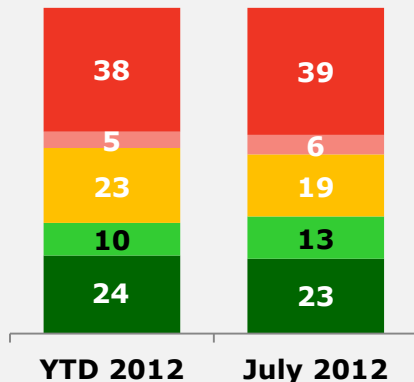
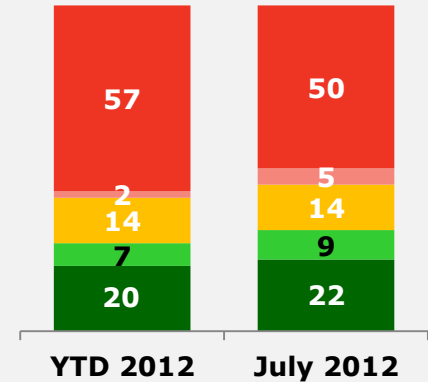
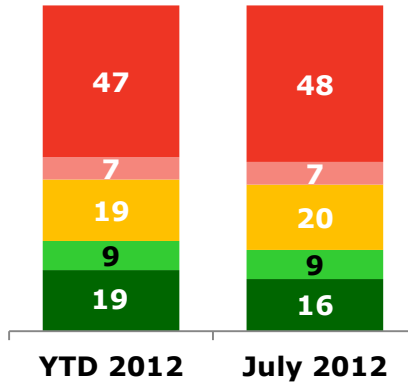
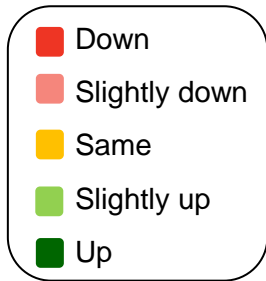
The recession has affected us in a negative way/ general sales are down and though we get the same number of people coming in they tend not to spend the same as before

This attraction is at the luxury end of the market so people would rather spend money on their holidays, home improvements or child care costs so that impacts on the visitors we have

”

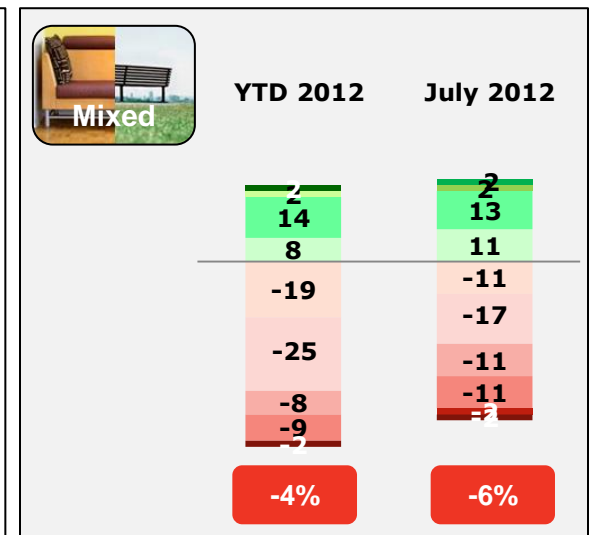
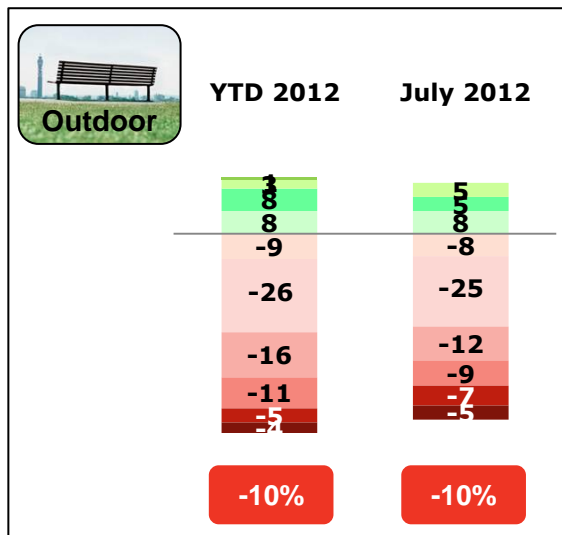
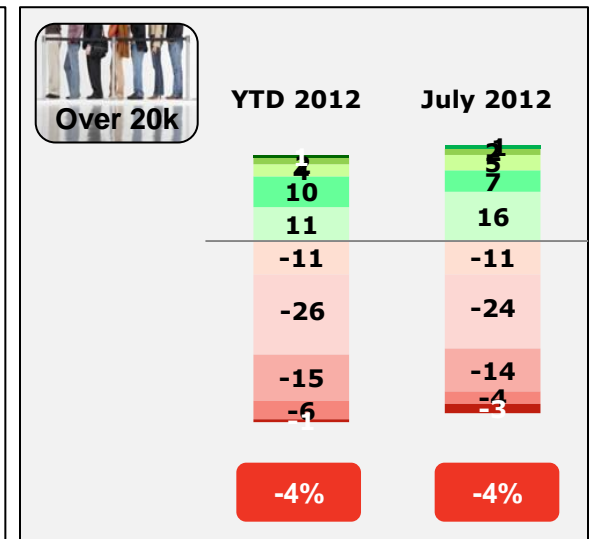
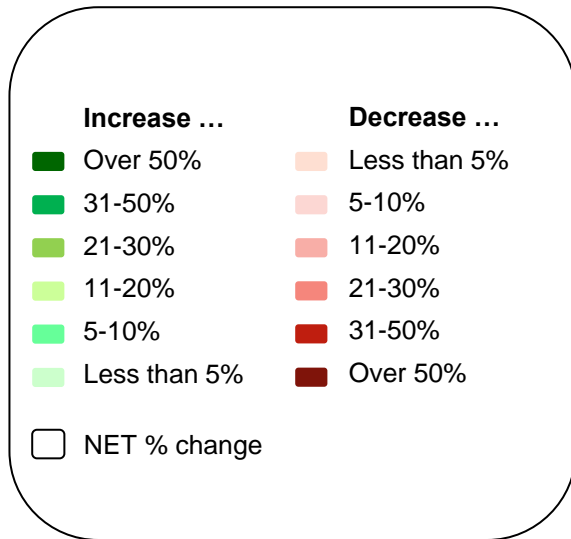
Visitor numbers: Year-on-year changes by attraction type

Business performance has continued to run below levels in 2011. Outdoor businesses in particular are suffering at the hands of the weather, with over 7/10 reporting a decline in visitor numbers.



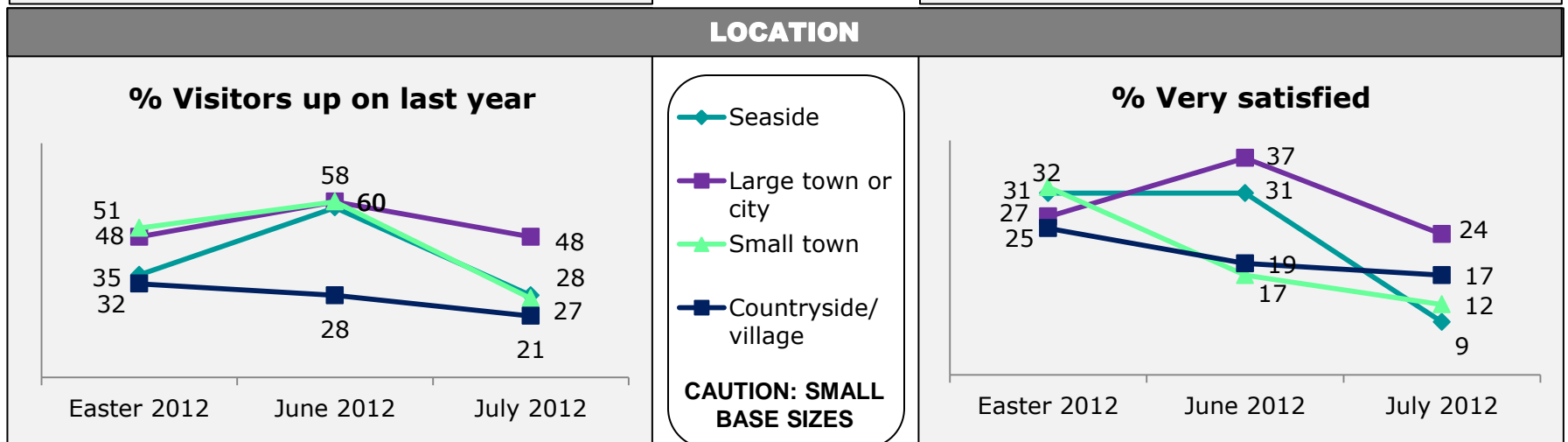
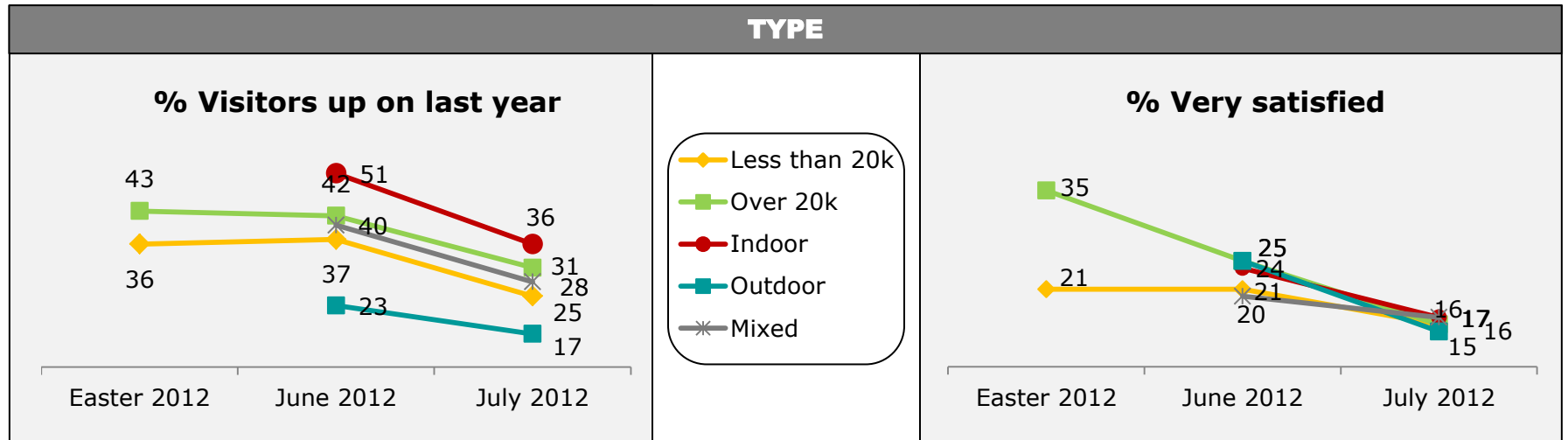
Visitor numbers: Degree of year-on-year changes by attraction type

On average, outdoor attractions have lost 10% of their visitors compared with 2011.



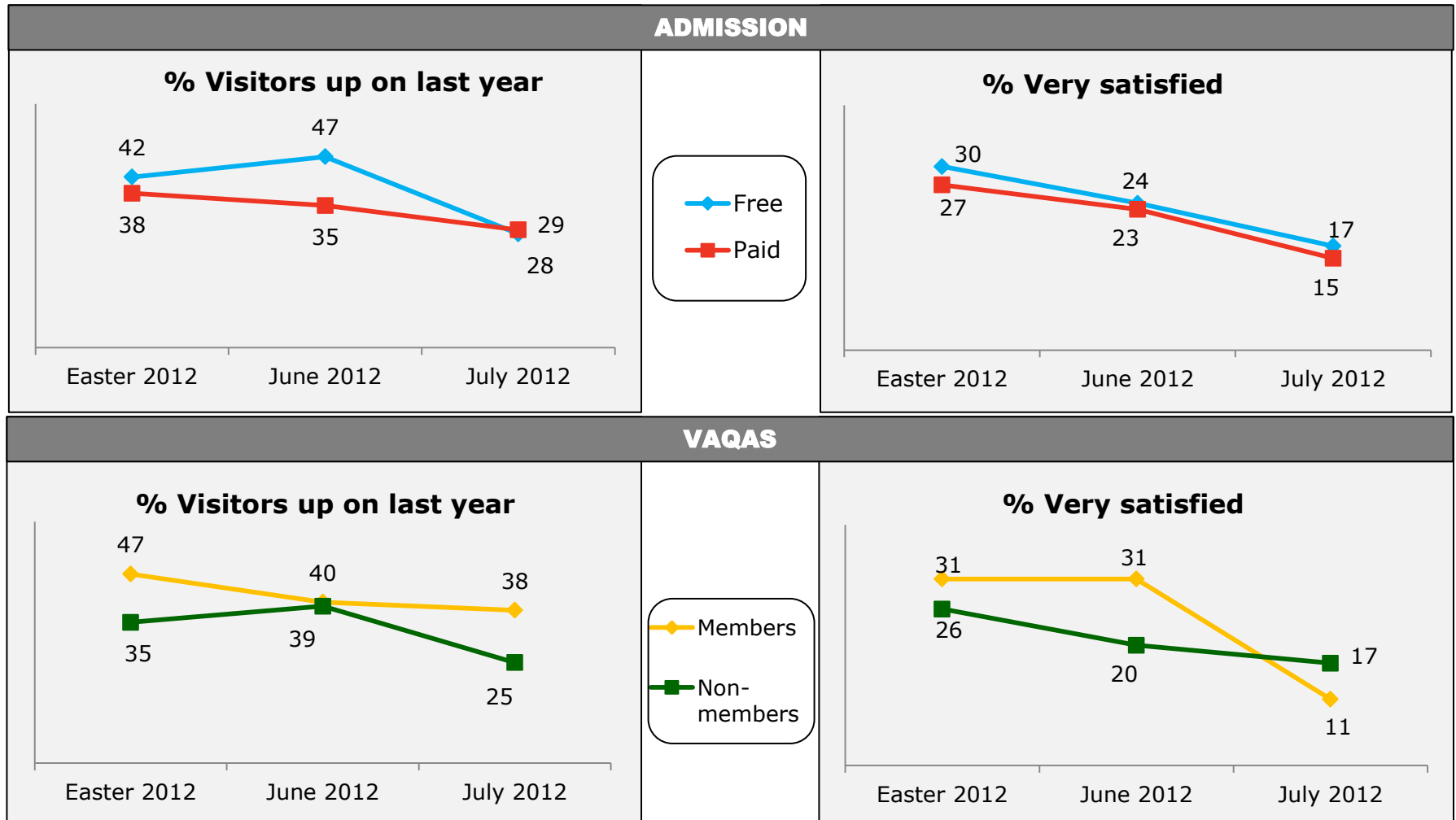
Changing business performance: By attraction type & location

Difficult trading conditions have affected all types of attractions, but seaside attractions have been worst hit by the wettest June on record.



Changing business performance: By admission charge and VAQAS

The cost advantage of free attractions has not served to insulate them from the difficult climate. However, VAQAS members have fared better than the rest of the sector.

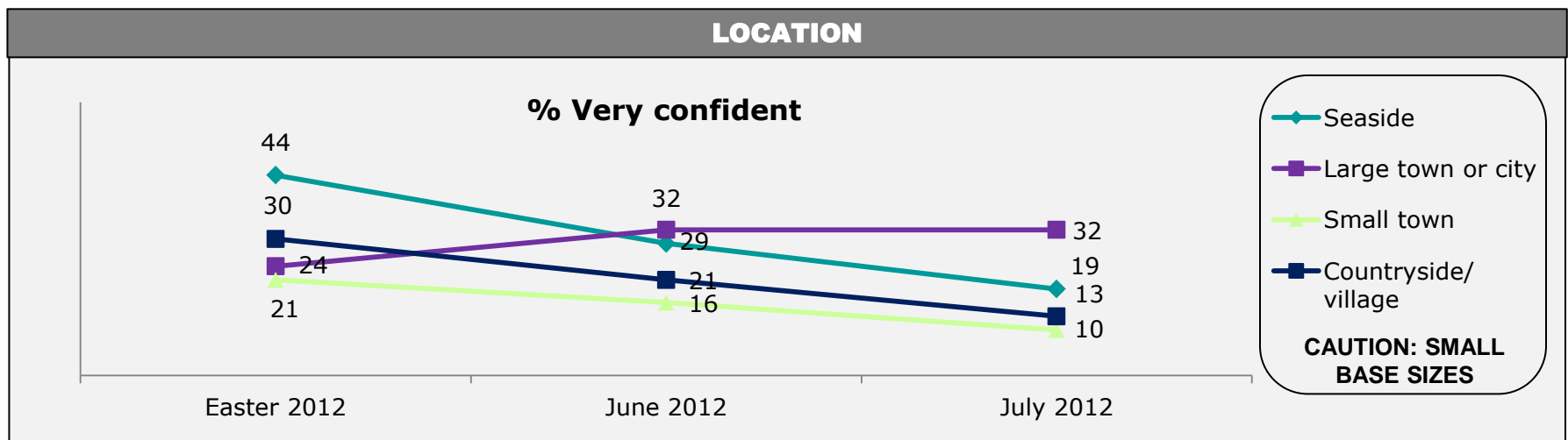
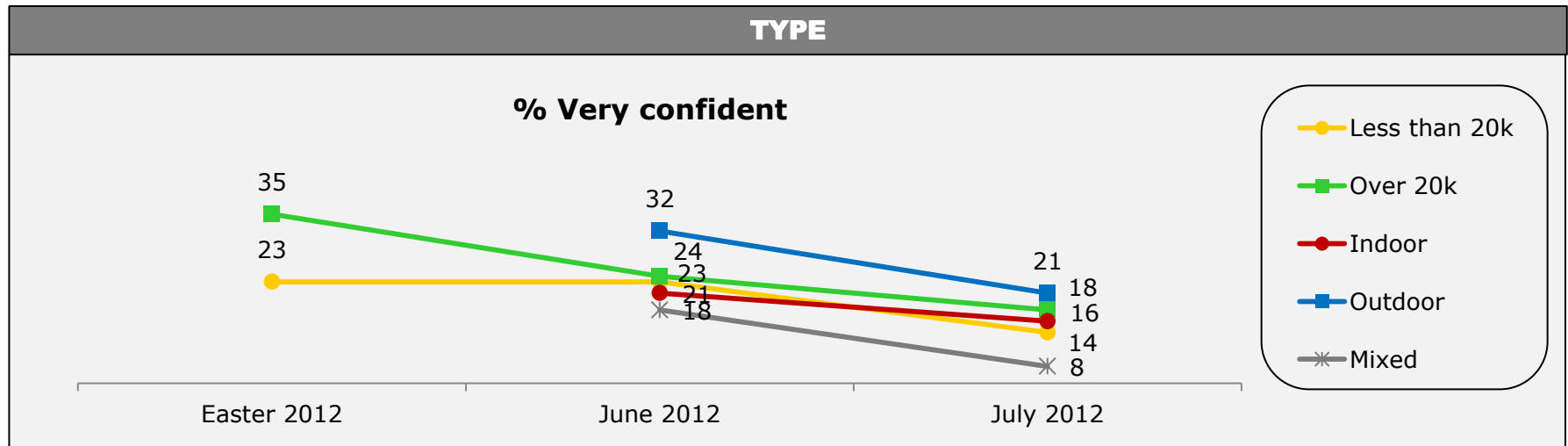


Future performance



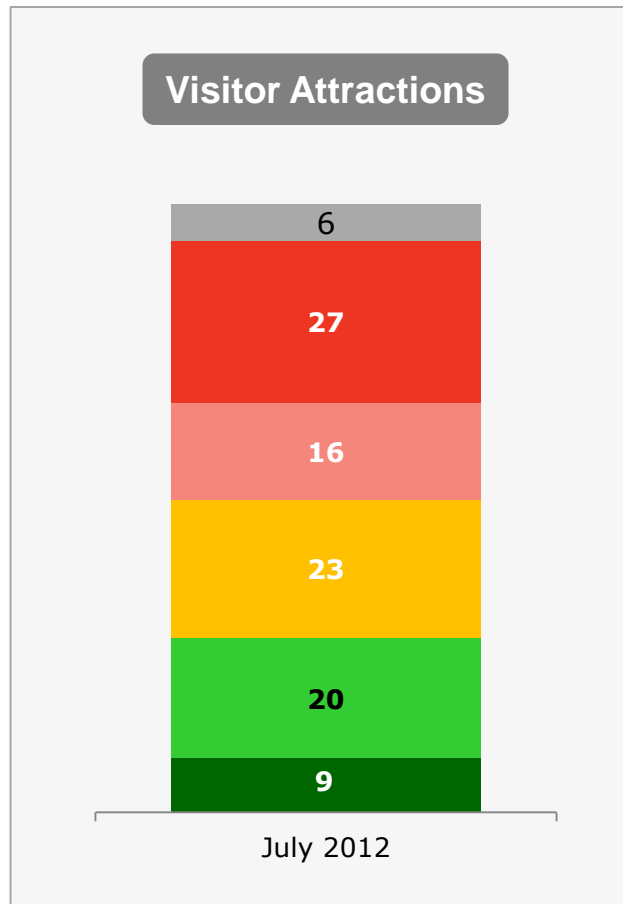
Confidence for forthcoming period: Attractions

Confidence has declined for all types of attraction. Only large town/ city attractions maintain a consistent outlook with last wave.



Importance of discounting and deals to business performance in the upcoming period

Despite it being high season, over a quarter of attractions are relying on discounting to boost visitor numbers



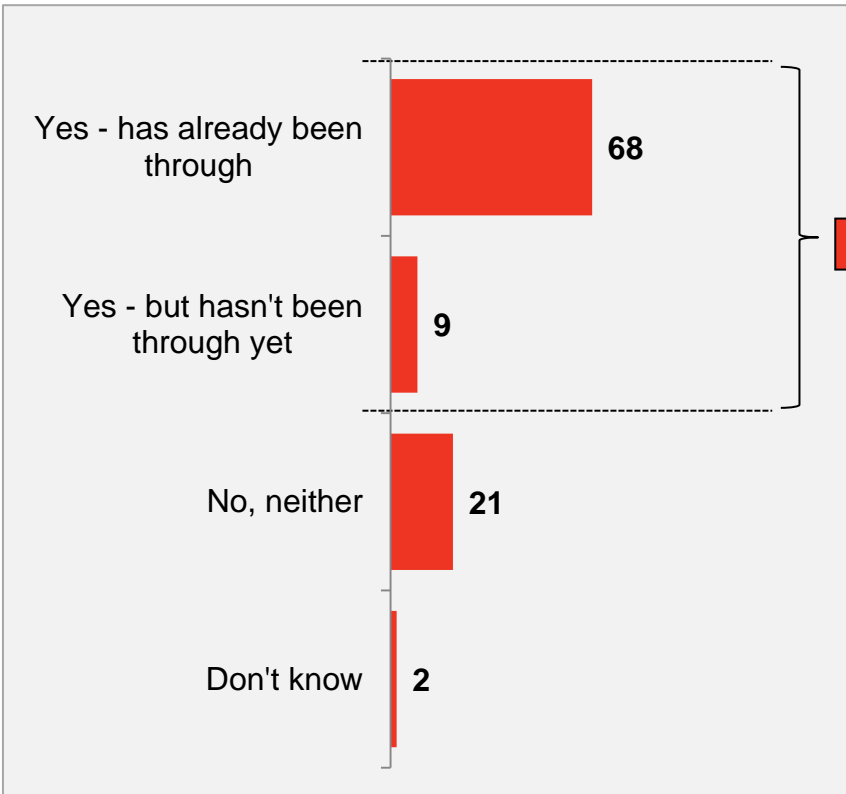
- Don't know
- Not at all important
- Not very important
- Neither important nor unimportant
- Quite important
- Very important



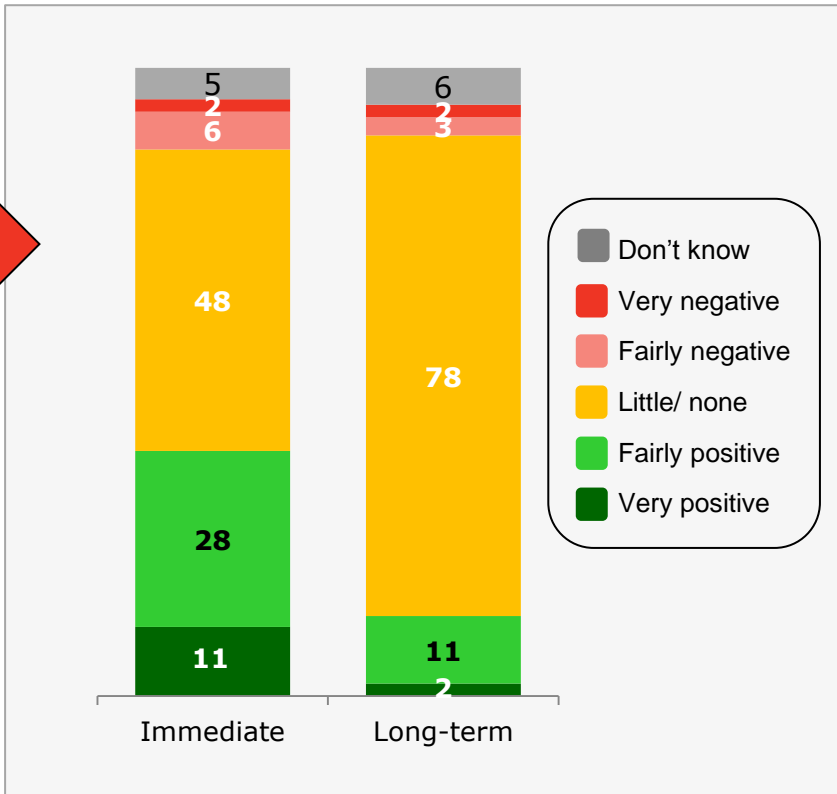
Olympic Torch route and impact upon business

The route taken by the torch will reach 77% of attractions and 2 in 5 believe it had a positive impact on local business – although not necessarily their own.

Is the torch passing through your area? %



Impact upon business

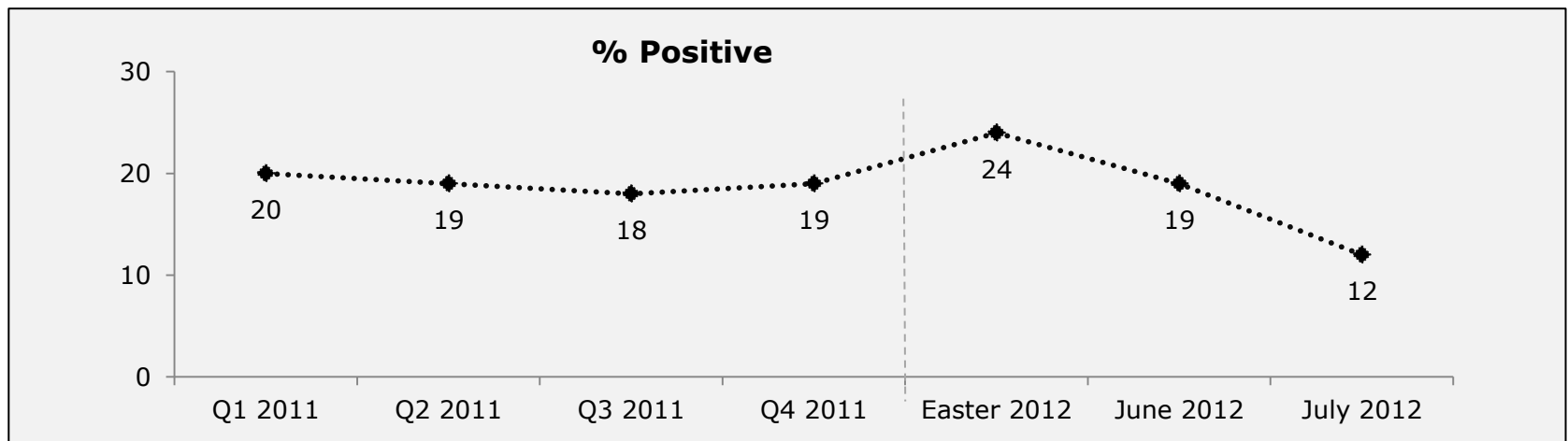
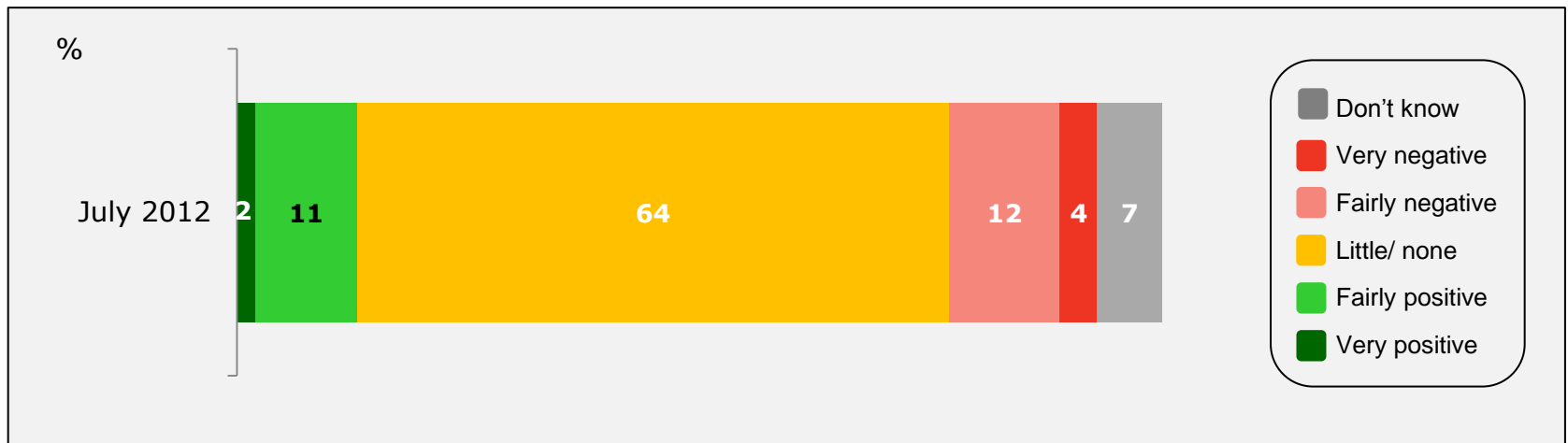


It would have helped local businesses when people came to see the torch but it was all over within 2 to 3 hours so I don't think it will have a lasting impact.

We were quiet on that day because lots of people chose to go and look at the torch

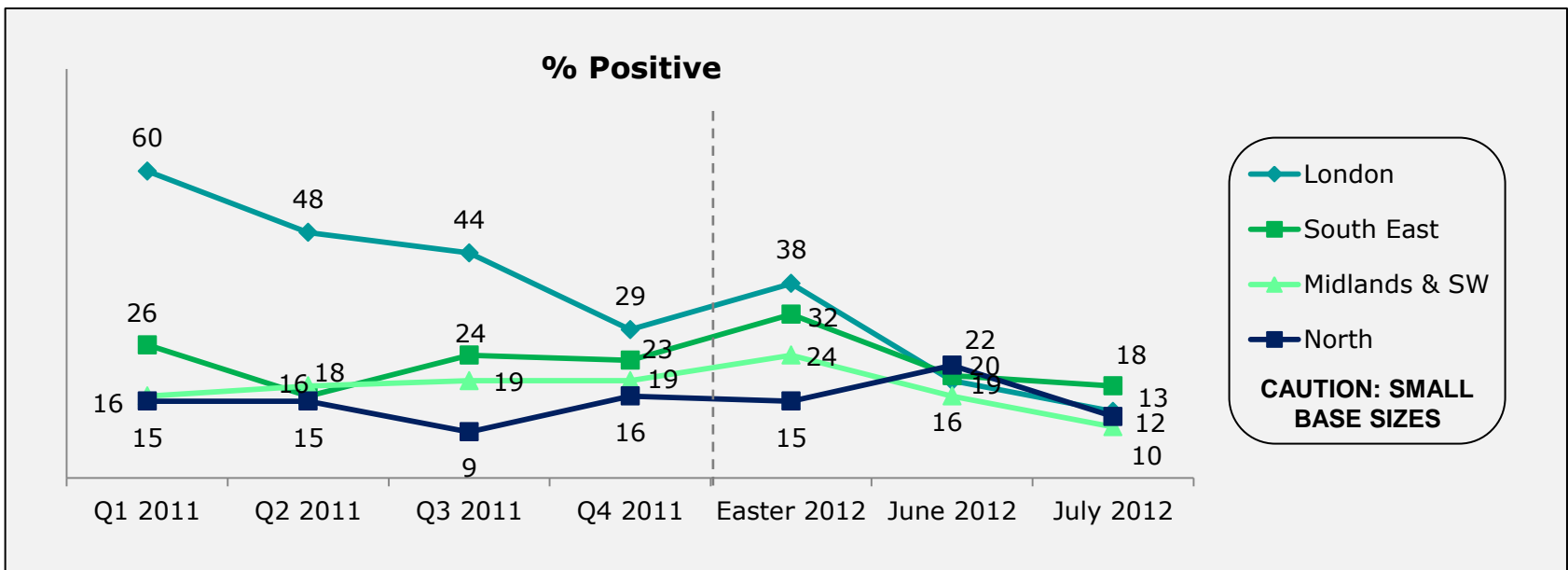
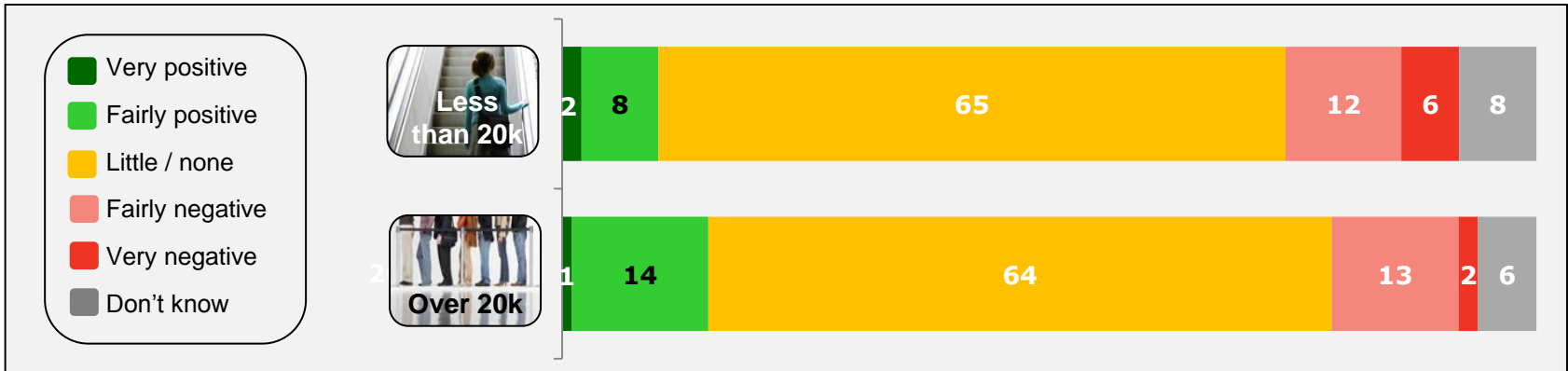
Impact of 2012 Olympics: Attractions

Positive feeling towards the Olympics continued to wane in July, with more attractions now believing the Games will have a negative impact than those who feel positively about the event.



Impact of 2012 Olympics: Attractions by region

Positivity towards the Olympics amongst attractions in all regions continues to fall as it gets closer – perhaps the negative media taking hold?



Positive verbatim comments on business confidence

“

Cautiously optimistic. We are going to have to be flexible and look for opportunities

Optimistic because it's the summer holidays; its our peak time, always

Pretty positive - I say that because I know how much work we have on. We have a consistent flow of projects on so it's looking pretty good

A lot more people are staying at home on holiday so we might get a few more visitors who would have gone abroad previously

We are supposed to be in a recession but we have actually retained the number of visitors so I am satisfied with that

We get good publicity from the Olympics which should increase or at least maintain our visitor numbers

We are pretty positive - we have our visitor outdoor advertising campaign around about now and free exhibition

We are a small charity with small admission fees so I find that people do come to us as they don't have a lot of money to spend. The school hols should have started so for the next 6 weeks we should be jam packed and we also have [a prominent visitor] coming on Monday so this should bring more visitors

”

Negative verbatim comments on business confidence

“

It's going to depend on the weather. People do not come to our events if it is raining. We have to restrict our activities if the ground is waterlogged - I am wondering whether our event on Saturday will attract anybody because I am looking out the window and it is still raining

As an independent charity we are not commercial so we are resigned to the recession

We've had a lot of torrential rain which we believe has stopped people from coming out and we had nearby flooded roads which stopped people from getting to us

We are on the verge of collapse because nobody is spending - there is too much money being spent on the Olympics

Unless the weather improves it's not going to be particularly good because we're just completely dependent on good weather to get people out

We are in an Olympic area and people just seems to be staying away because of traffic and hotel prices has risen

I am a art gallery and I sell luxuries and people are not buying luxuries because the money is not there

We are out in the country and people just don't visit if it's wet

”



Performance and confidence snapshot: July 2012

		Visitor Numbers (July)			Visitor Numbers (Year-to-date)			Confidence (Summer Holidays)	
		Up	Same	Down	Up	Same	Down	Very	Very / fairly
TOTAL (%)		27	16	57	27	16	56	16	81
Visitor numbers per annum (%)	Less than 20k	25	20	55	28	19	53	14	79
	20k or over	31	14	55	27	14	60	18	83
	20k-50k	38	10	52	36	8	56	21	86
	50k-100k	27	15	58	18	18	64	27	88
	Over 100k	28	17	55	23	17	60	7	76
Type (%)	Indoor	36	19	45	34	23	43	16	80
	Outdoor	17	15	67	20	9	71	21	84
	Mixed	28	18	54	25	12	63	8	81
Charge (%)	Paid	28	13	59	28	10	63	14	79
	Free	29	23	49	26	26	49	18	84
VAQAS (%)	Yes	38	12	50	28	11	60	9	87
	No	25	19	56	27	18	55	17	80
Location (%)	Seaside	28	14	59	17	14	69	19	84
	Large town / city	48	13	39	41	28	33	32	79
	Small town	27	25	48	31	16	52	10	78
	Rural	21	16	63	22	13	65	13	83