Tourism Business Monitor 2014

Visitor Attractions Report

Wave 3 – Post-Easter until mid-July

VisitEngland

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.

Fieldwork dates:

Jul 2014: 14-20 July 2014, reviewing the period after the Easter holidays up until mid-July

Apr 2014: 24 May - 1 Apr 2014**,** reviewing the Easter period 2014

Jan 2014: 6-12 January 2014, reviewing the Christmas and New Year period 2013

Nov 2013: 4-10 Nov 2013, reviewing mid-September until the end of October

Sept 2013: 9-14 Sept 2013, reviewing the period from mid-July up until the end of the summer holidays

Jul 2013: 11-19 July 2013, reviewing the period after the Easter holidays up until mid-July

Apr 2013: 15-21 April 2013, reviewing the period from January until the end of the Easter holidays

Jan 2013: 7-13 Jan 2013, reviewing Christmas and New Year period 2012

Nov 2012: 5-12 Nov 2012, reviewing mid-September until the end of the October

Sept 2012: 10-17 Sept 2012, reviewing the school summer holidays

Attractions sample targets (total 300)

Region	
North (North East, North West, Yorkshire)	84
Midlands (East Midlands, East, Heart of England)	95
South (South East, South West)	105
London	16

Size (visitors p.a)	
Over 100k	57
50-100k	35
20-50k	57
Under 20k	151

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.

Key Findings

After a highly successful Easter period, levels of satisfaction and visitor increases have dipped back down slightly to levels seen at this time last year. Overall visitor numbers are up by 3% both for the latest period, and for 2014 so far. Confidence levels for the forthcoming peak Summer period and business optimism for 2014 overall have remained stable.

Visitor numbers are up across all visitor profiles, for all attraction types for the year-to-date. Paid attractions have seen a particularly high increase in domestic and overseas visitors this year.

Smaller attractions and indoor attractions are slightly behind others in terms of increases in visitor numbers for the most recent period, but half have reported that visitors are still up for 2014 so far compared with the same period last year.

Satisfaction levels have dipped a little since last wave, particularly for more rural attractions who were perhaps expecting a better few months, but are still on a par with the post-Easter period last year. Also, more VAQAS members than non-members have reported an increase in visitors for the post-Easter period compared with last year.

Business optimism for 2014 as a whole compared with 2013 has remained stable since the beginning of the year, and is higher than at this same time last year.

Confidence levels for the forthcoming period across all attraction types and locations are generally similar to this time last year. Rural attractions, however, are less confident than last year, possibly due to their lower levels of business satisfaction for this post-Easter period, and have the lowest confidence levels of all location types for the forthcoming period.

Almost all attractions have their own website, and most have a Facebook page and/or Twitter account. Only around 1 in 4 have the option to book online in advance, or a mobile optimised app, although larger attractions are slightly more likely to have these.

The majority of attractions update their Facebook and/or Twitter business accounts at least once per week. Larger attractions update their Facebook accounts more frequently, with almost half doing this daily.

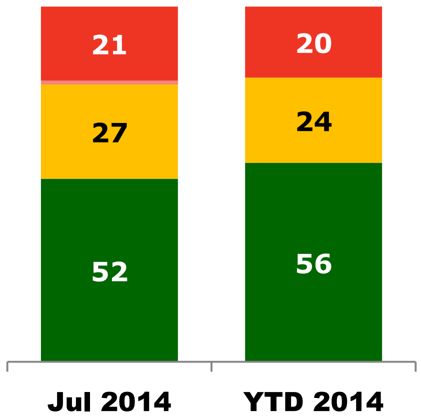
Just over half (52%) of attractions receive online customer feedback at least 2-3 times a week. Slightly over a fifth of seaside attractions receive online customer feedback more than once a day, whilst only 8% of attractions in cities do.

Business Dashboards

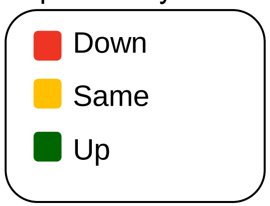
Business Performance Dashboard: Attractions

VISITOR NUMBERS

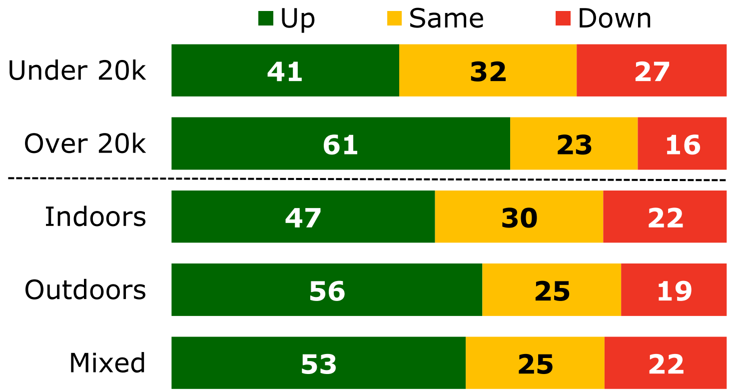
Visitor numbers (%)



Versus same period previous year…

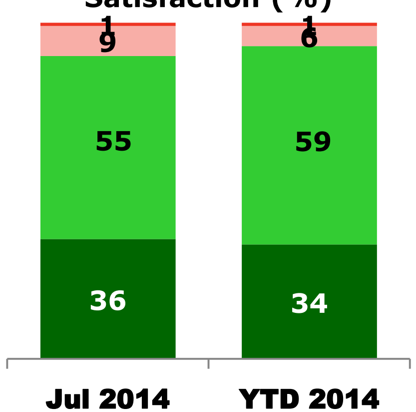


Visitor numbers for period after Easter holidays until mid-July 2014 compared with same period 2013 (%)



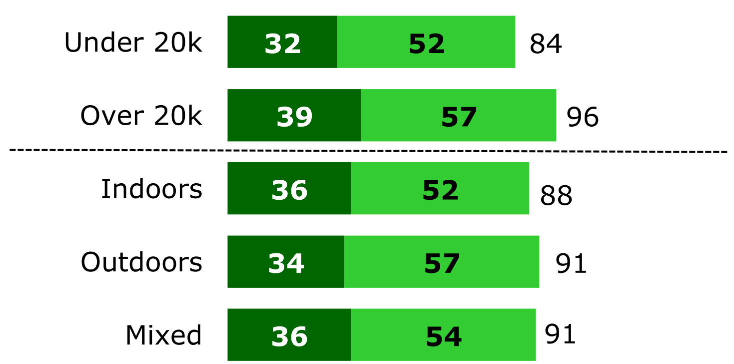
SATISFACTION

Satisfaction (%)



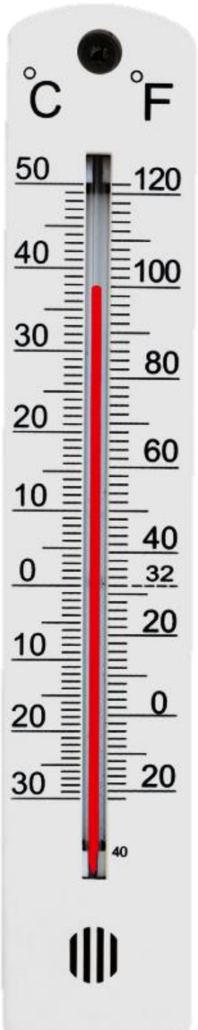
Satisfied with business performance…

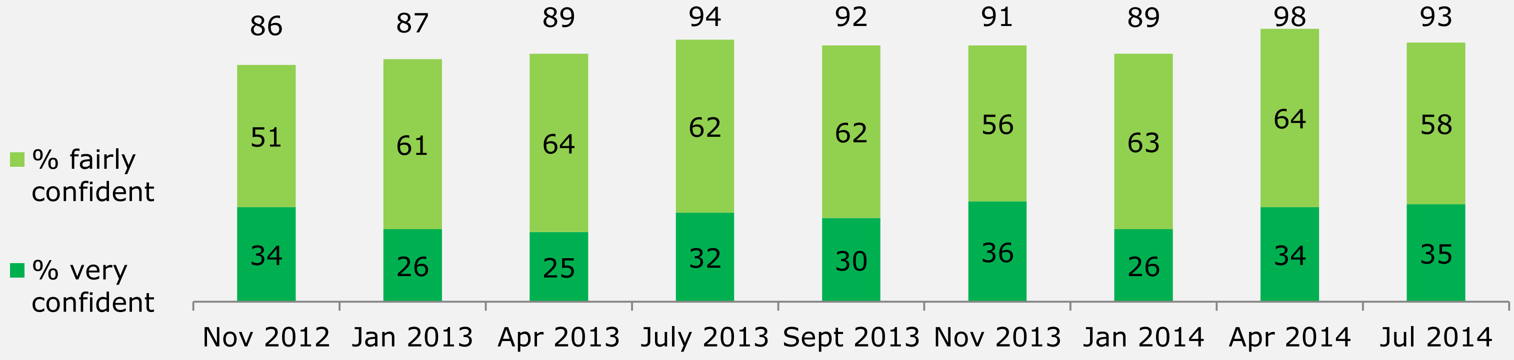
Satisfaction with Performance during period after Easter holidays until mid-July 2014 (%)



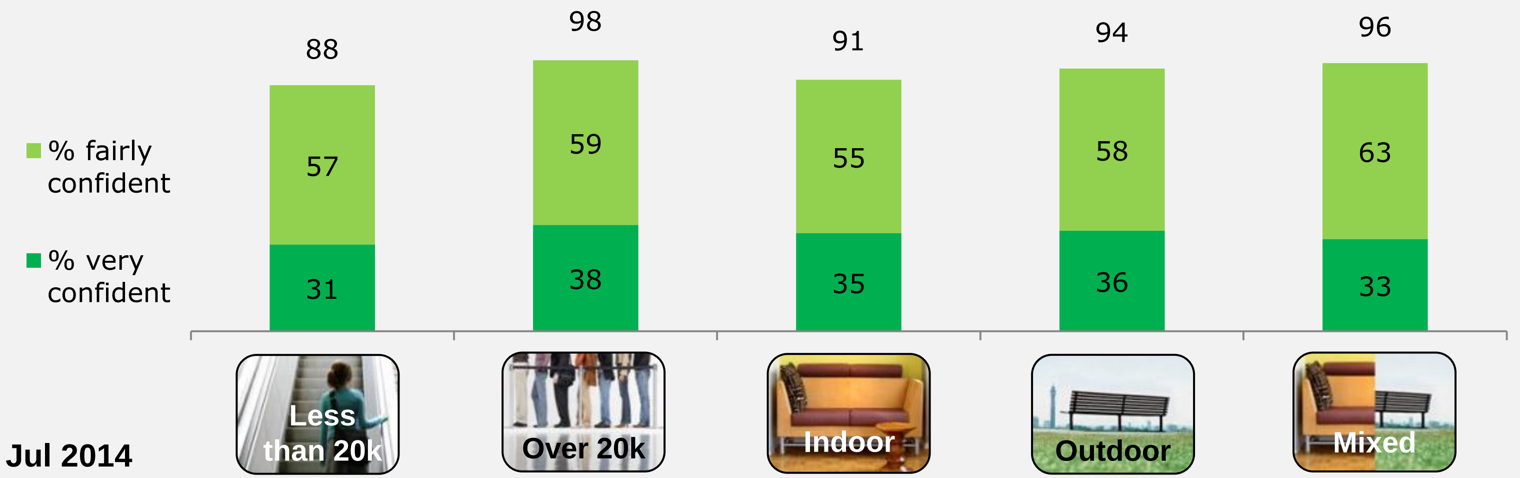
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July 2014

Business Confidence Dashboard: Attractions





Period asked about:	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of school summer holidays	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of school summer holidays



PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
Jul 2014: Up until end of school summer holidays

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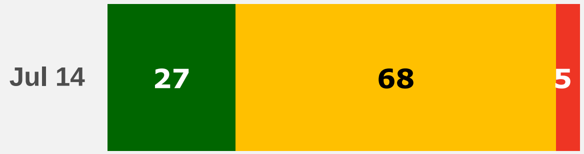
Visitor Profile

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

Up Same Down

NET: Up - Down



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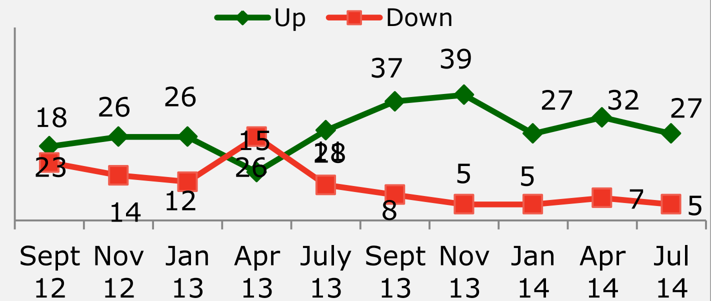

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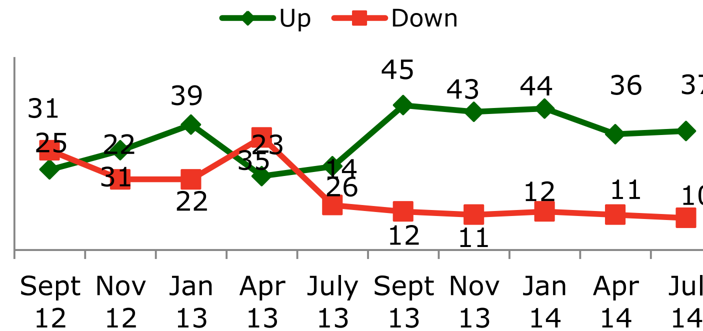

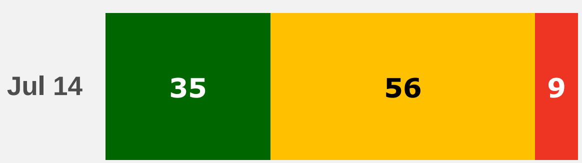

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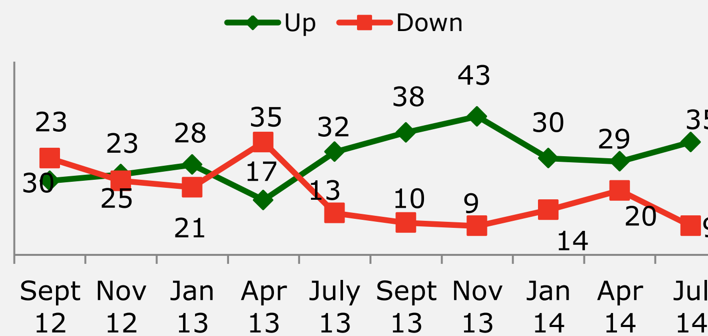


Changing Visitor Profile (year-to-date vs. previous year): Attraction type

Visitor numbers are up across all visitor profiles, for all attraction types.

Visitors from immediate locality

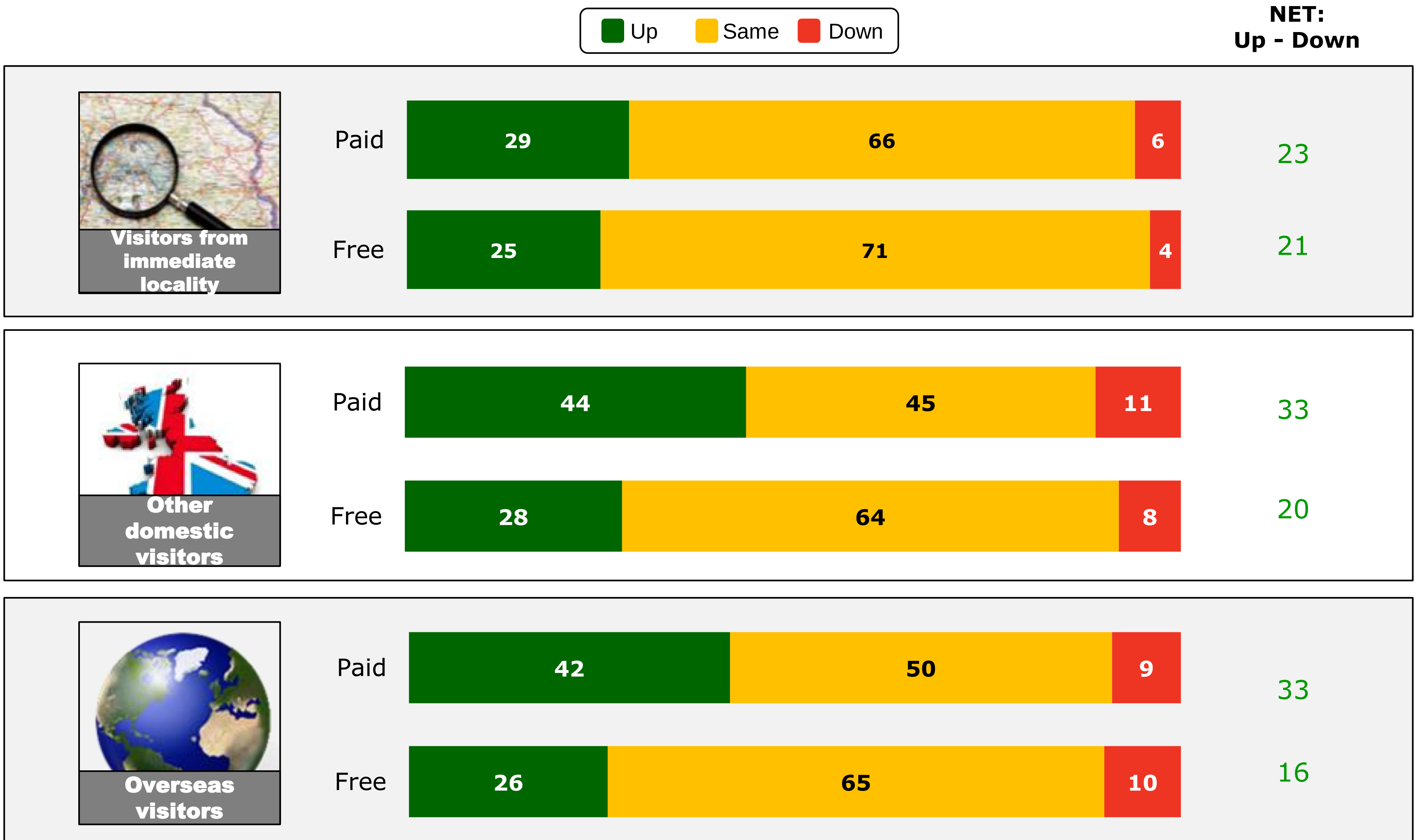
Other domestic visitors

Overseas visitors

Visitor profile	Attraction type	Up	Same	Down	NET: Up - Down
Visitors from immediate locality	Under 20k	24	71	5	19
	Over 20k	30	65	5	25
	Indoors	25	72	4	21
	Outdoors	25	66	9	16
	Mixed	32	65	3	29
Other domestic visitors	Under 20k	30	56	13	17
	Over 20k	44	50	6	38
	Indoors	35	58	8	27
	Outdoors	35	56	9	26
	Mixed	45	42	14	31
Overseas visitors	Under 20k	37	52	11	26
	Over 20k	32	60	7	25
	Indoors	33	59	7	26
	Outdoors	32	59	9	23
	Mixed	40	48	11	29

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

Paid attractions have seen a particularly high increase in domestic and overseas visitors this year compared to last.

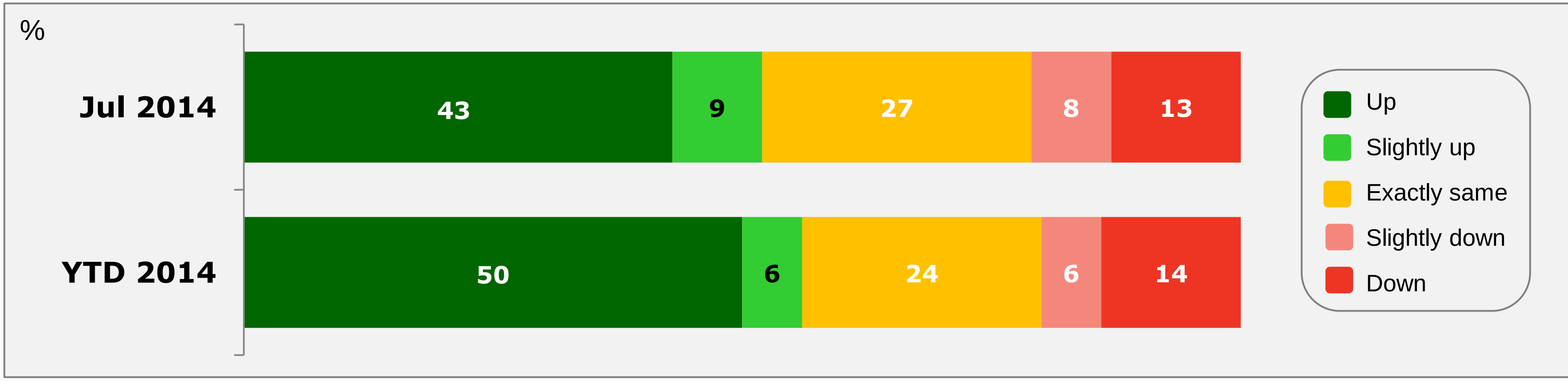


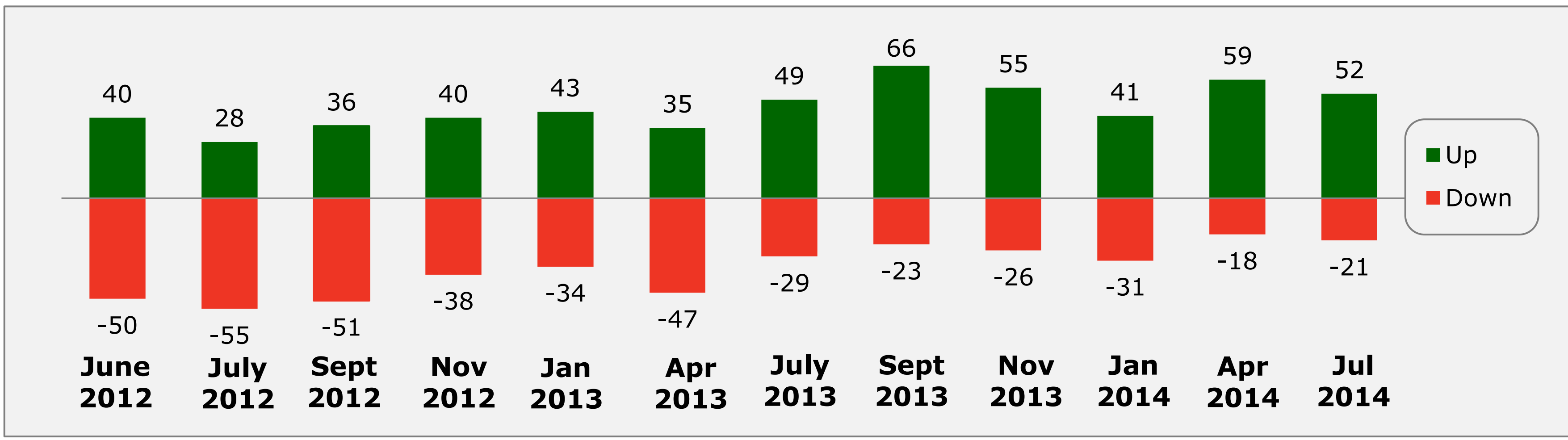
Q13

Past Performance

Visitor numbers: Year-on-year changes

Although down slightly from April, more attractions are reporting an increase in visitors for the post-Easter period this year than last year. Consequently visitor figures are also up for the year-to-date.



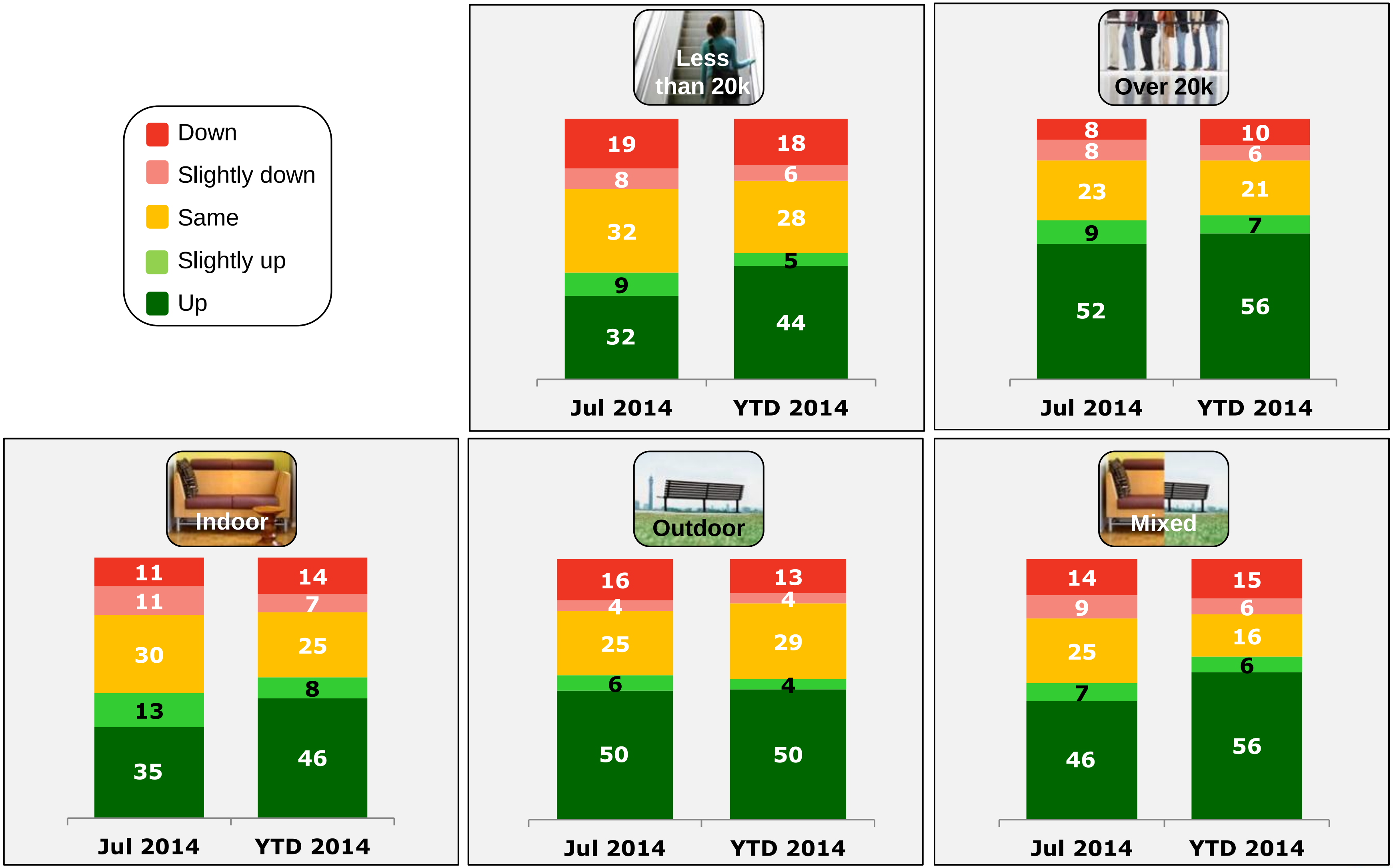


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July/ **Apr 2014:** the Easter period 2014 **/ Jan 2014:** Christmas and New Year period 2013/ **Nov 2013:** Mid-September until the end of October/ **Sept 2013:** Mid-July until end of Summer holidays

Q3/4, Q7/8

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

Although smaller attractions and indoor attractions are slightly behind others in terms of increases in visitor numbers for the most recent period, almost half said that visitors are still up for the year-to-date compared with last year.



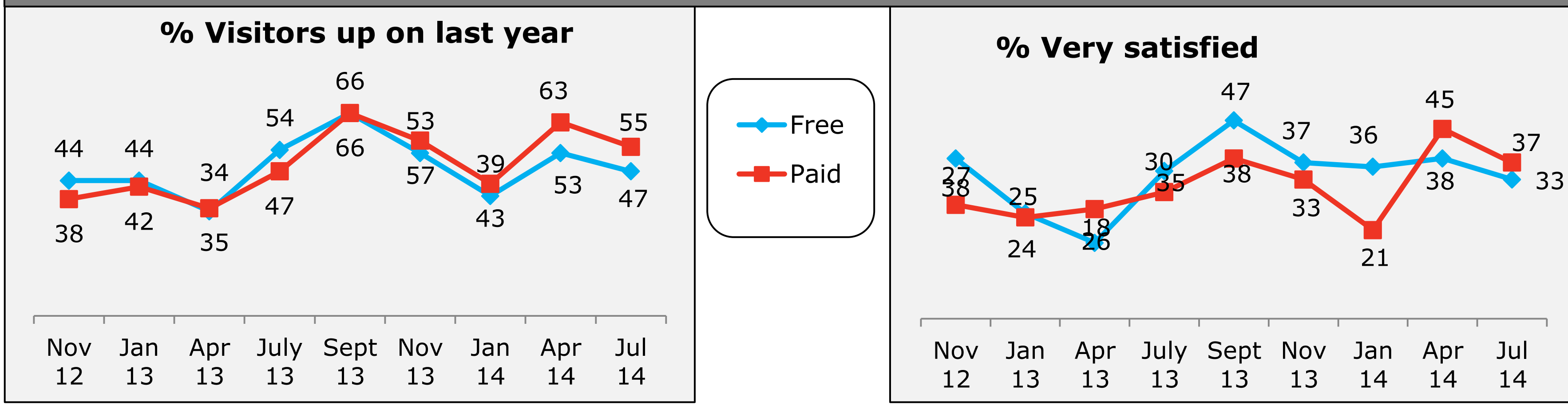
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July

Q3/4, Q7/8

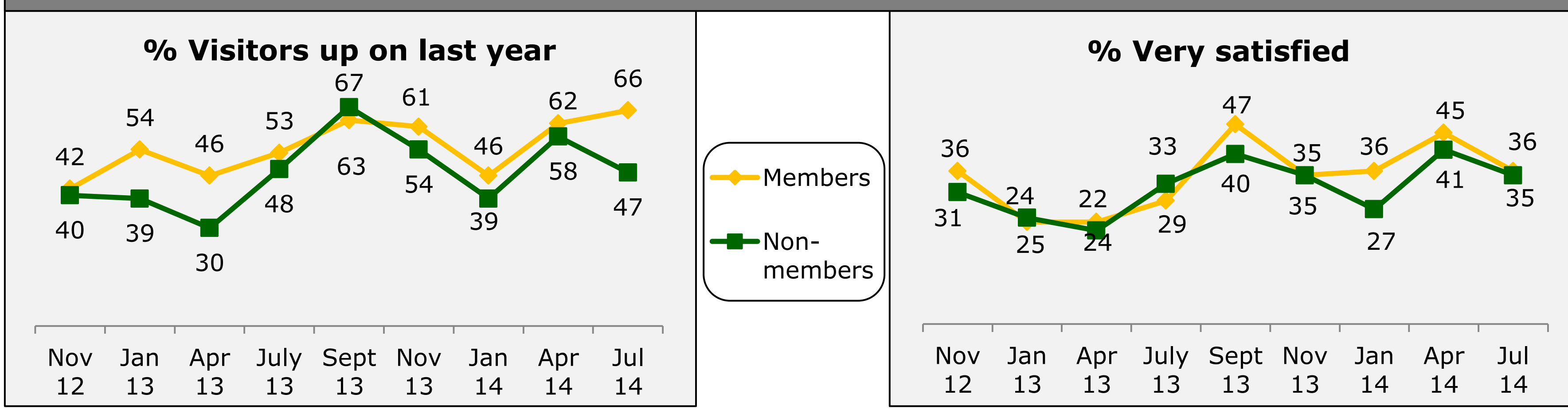
Changing business performance: By admission charge and VAQAS

More VAQAS members than non-members have reported an increase in visitors for the post-Easter period compared with last year. Satisfaction levels have dipped down after the particularly successful previous period.

ADMISSION

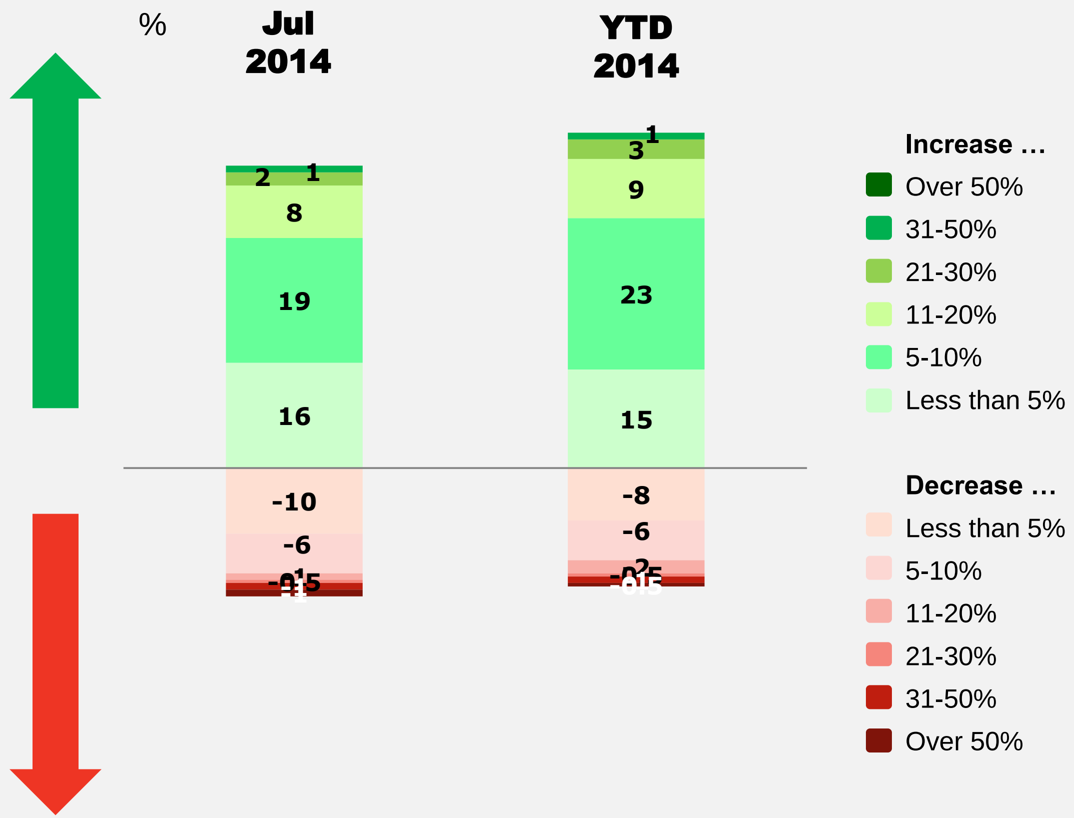


VAQAS



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

Attractions visitors for 2014 so far, and for the post-Easter period alone vs. last year are both up by 3%

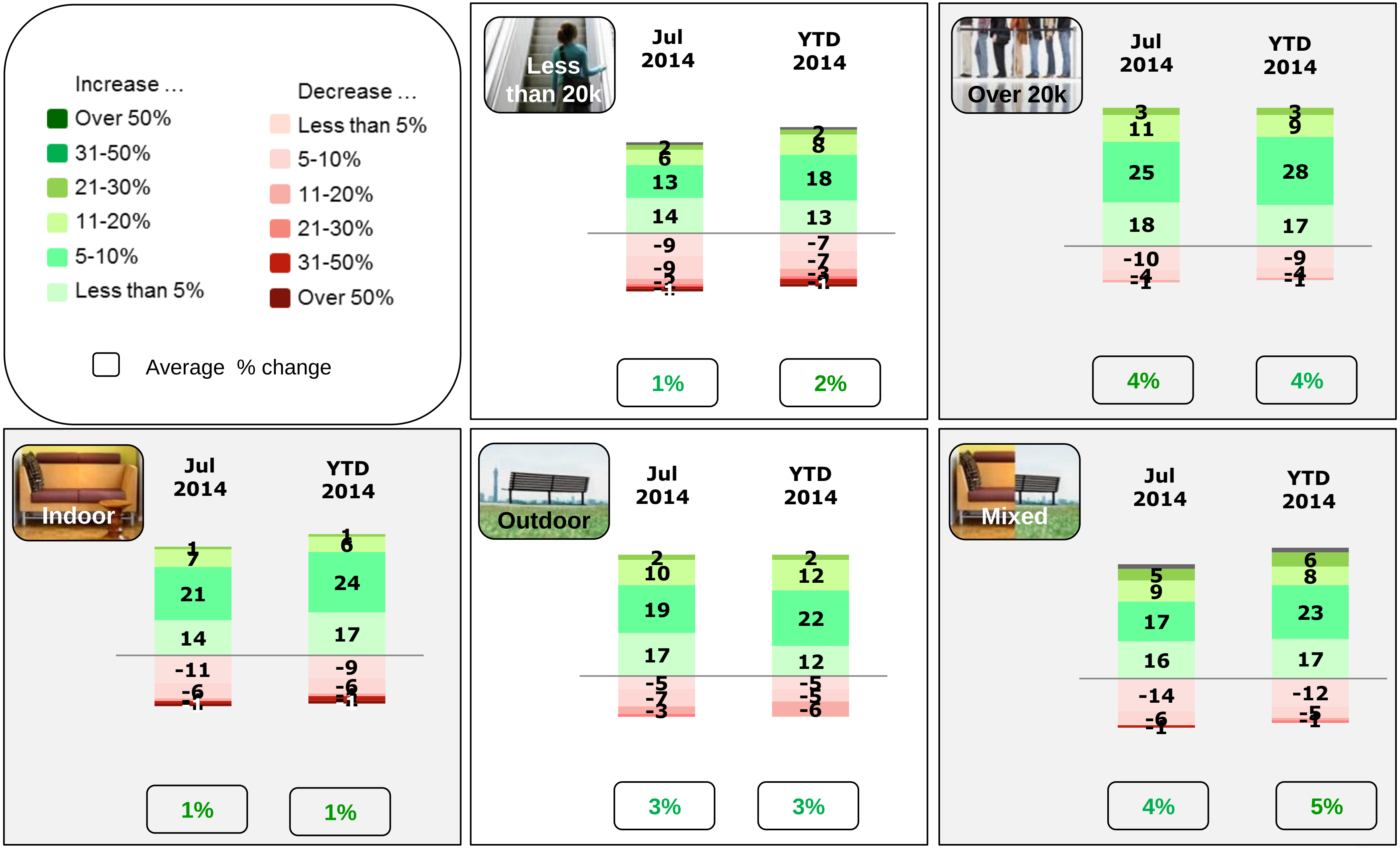


Average % change in visitor numbers	Jul 2014	YTD 2014
	3%	3%

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July

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

The slightly more changeable weather during the latest period may well have benefitted both indoor and outdoor attractions equally, visitor figures for the post-Easter period are slightly up across all attraction types.



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PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July

bdrc continental

Q5, Q9

Positive verbatim comments on business performance

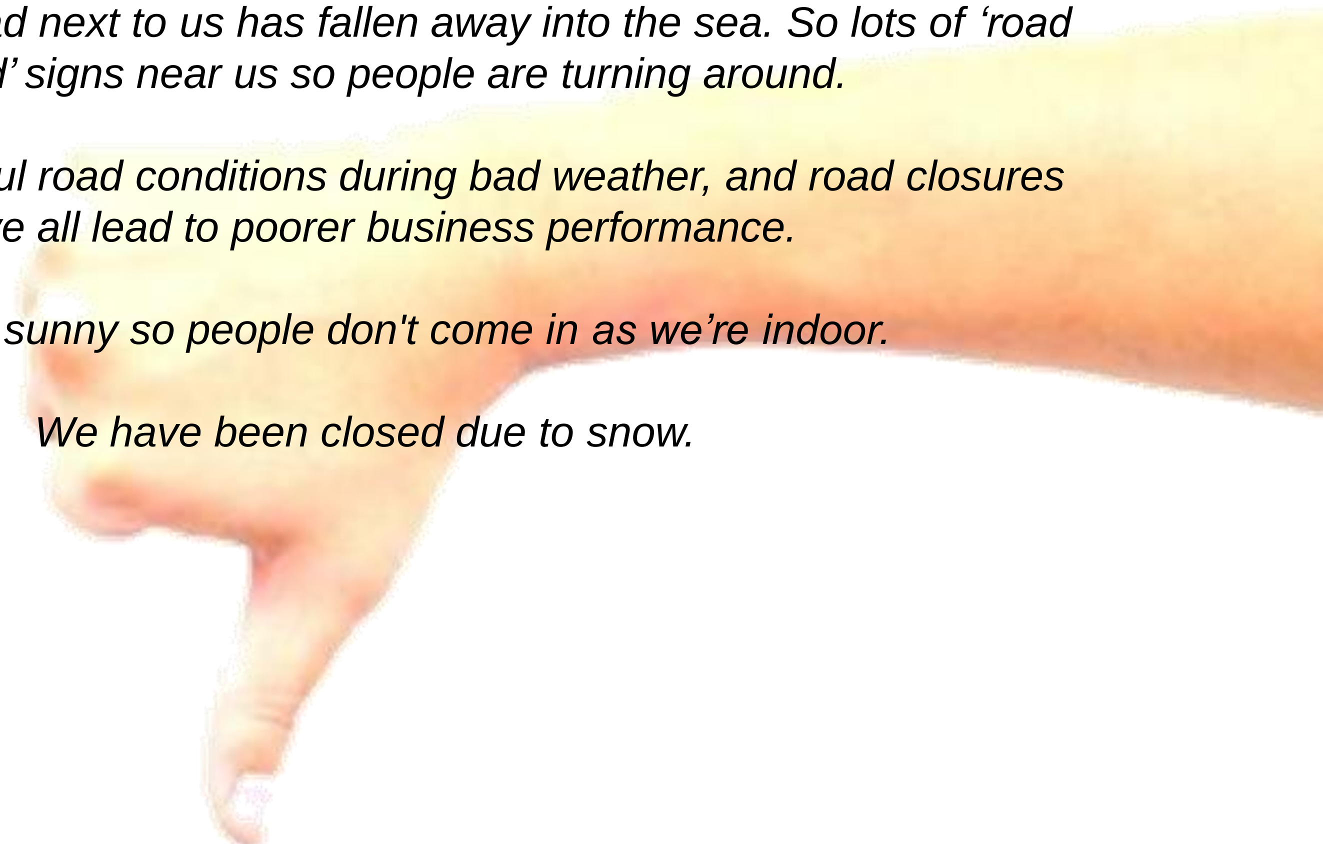
Good staff, good product, improved appearance of venue, new retail facilities, improved promotion – all reasons why we've been doing well recently.

The economy has been better: people have more money in their pockets, more disposable income.

We have done more things, we have got a leaflet and information website now.

Increasing awareness, improvements to the business and an increase in the number of visitor facilities.

Negative verbatim comments on business performance



“

Key one is the road next to us has fallen away into the sea. So lots of ‘road closed’ signs near us so people are turning around.

Bad weather, awful road conditions during bad weather, and road closures have all lead to poorer business performance.

Its been sunny so people don't come in as we’re indoor.

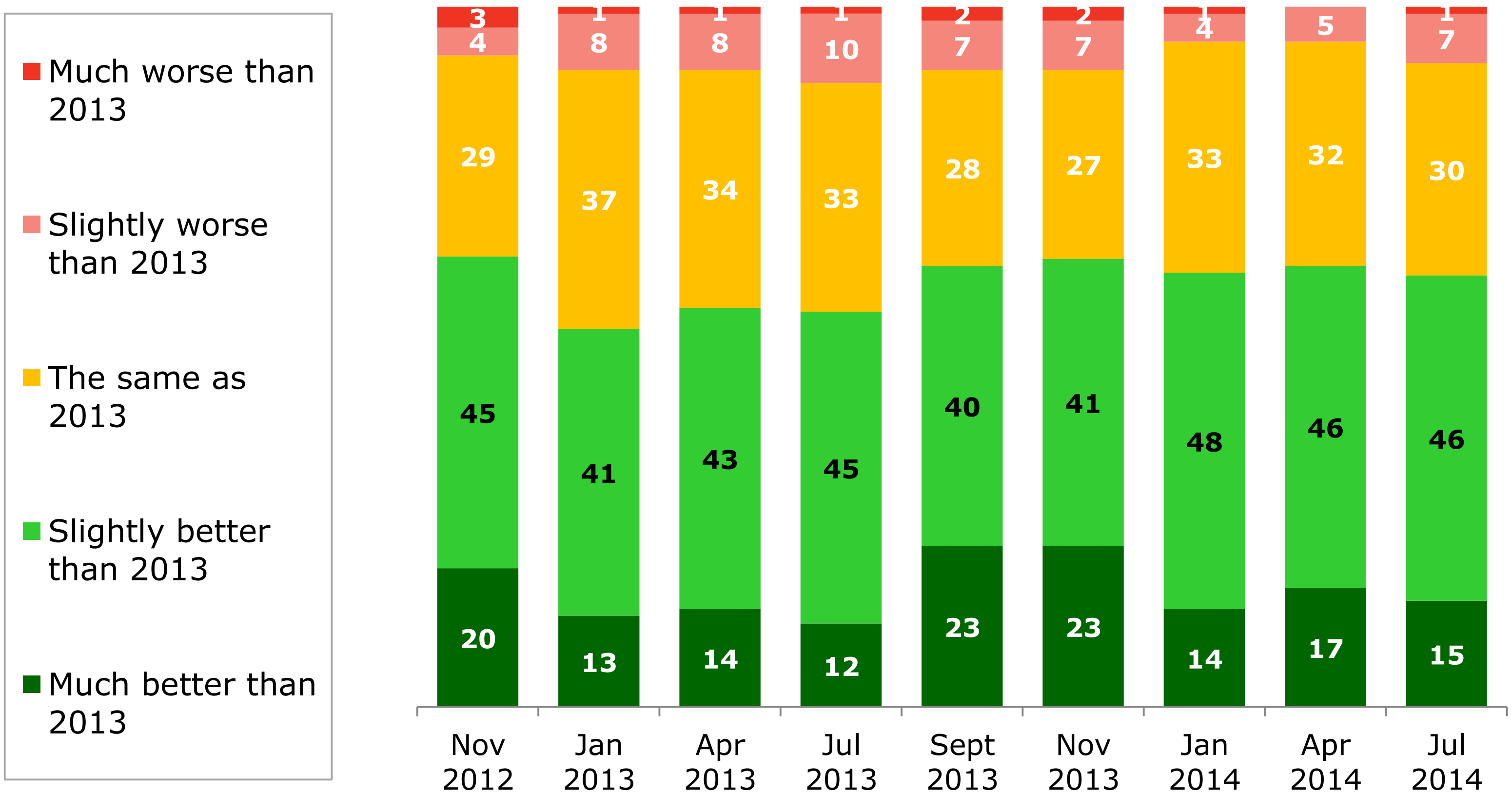
We have been closed due to snow.

”

Future Performance

Business optimism for 2014

Business optimism for 2014 as a whole compared with 2013 has remained stable since the beginning of the year, and is higher than at this point last year.

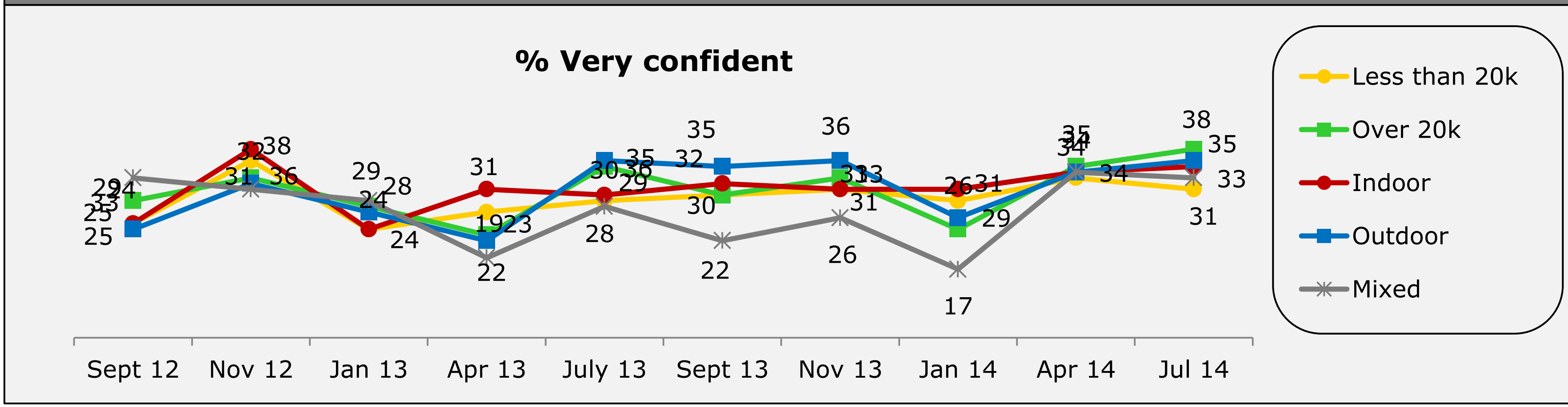


VisitEngland

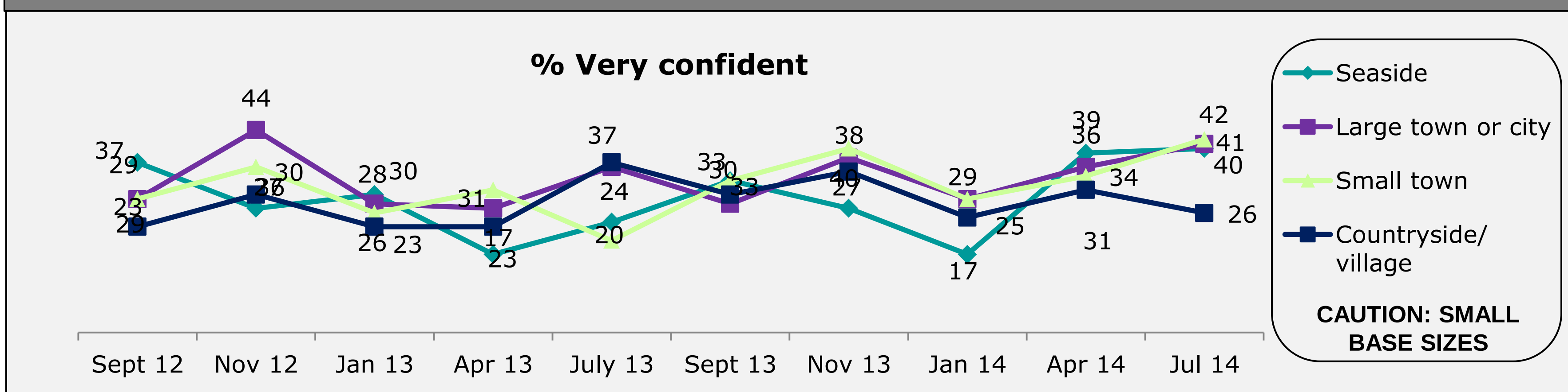
Confidence for forthcoming period: **Attractions**

Confidence levels across all attraction types and locations are generally similar to this time last year. Rural attractions, however, indicate less confident than last year and have the lowest confidence levels of all location types for the forthcoming period.

TYPE



LOCATION



Positive verbatim comments on business confidence

We are putting a lot of investment into marketing, so hopefully that will take effect.

We have done well so far and we haven't had our most important half of the year yet. September and October are our good months.

We had very good news of big funding from the arts council.

Because we are going to be actively improving the visiting centre and hoping for more returning visitors.

Very confident. We have a good summer season. We've got a good events list for the summer holidays.

Negative verbatim comments on business confidence

I think things will be more pushed in the future

Fewer members are visiting than last year and overall numbers are just down so I’m not feeling particularly confident for the upcoming few months.

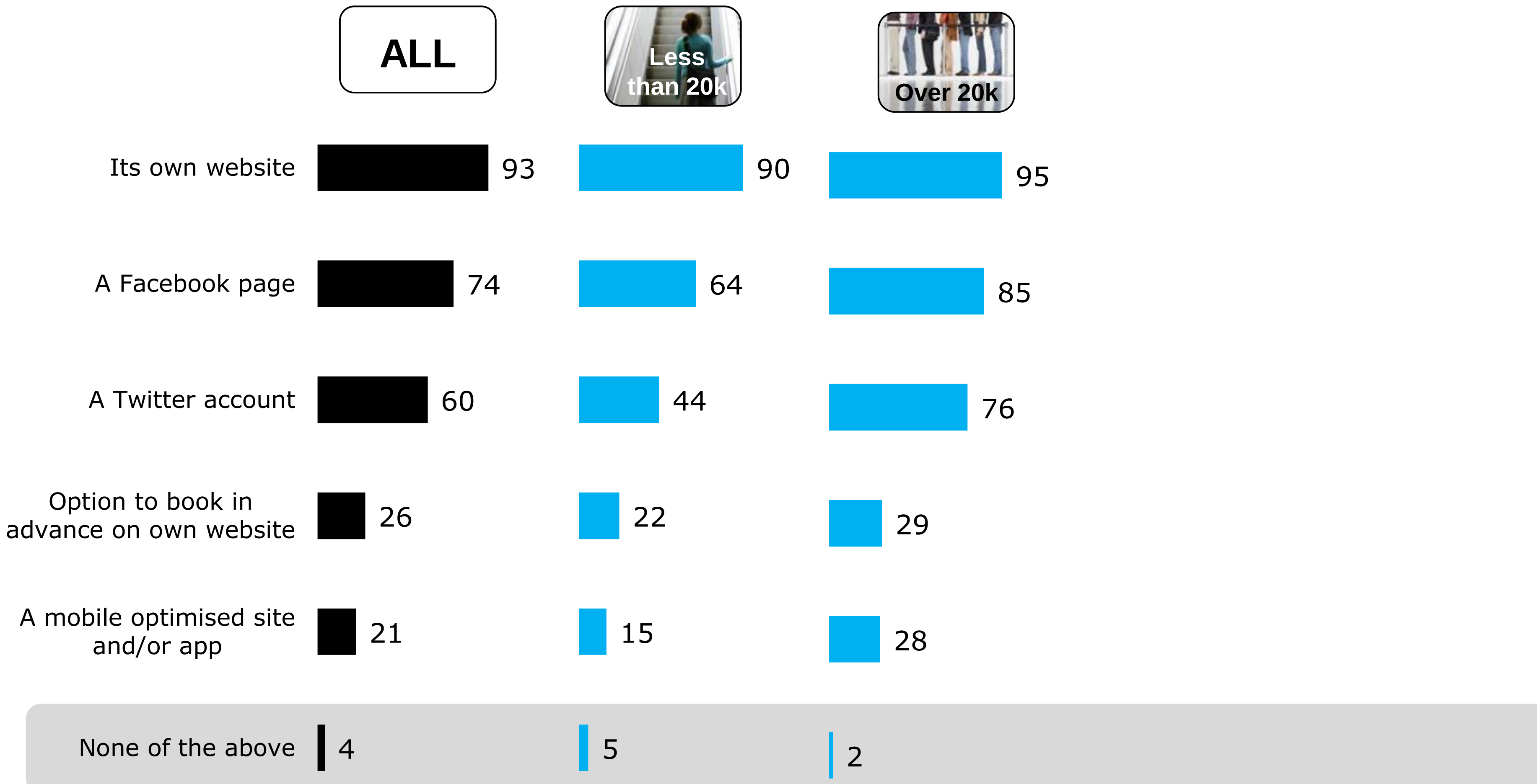
Half of the year has already gone and the numbers are down and I don’t see it picking up much in the near future

Until the end of August I expect numbers to be down. The July numbers are disappointing; this could be the weather. Our numbers are very up and down this year.

Online Communications /Access

Online communications / access

Almost all attractions have their own website, and most have a Facebook page and/or Twitter account. Only 1 in 4 have the option to book online in advance, or a mobile optimised app, although larger attractions are slightly more likely to have these.



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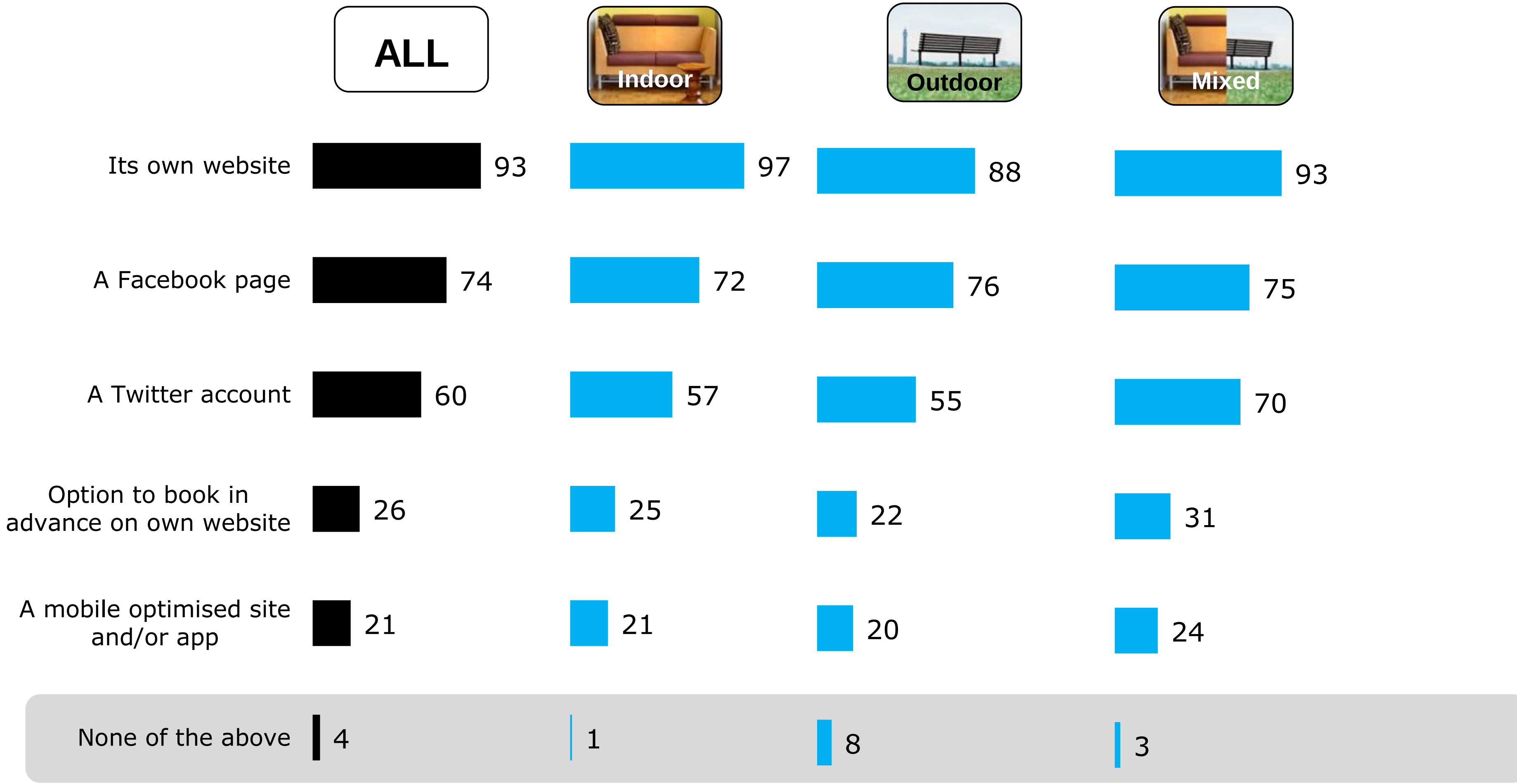
Q16a

Online communications / access

Mixed indoor/outdoor attractions are more likely to have a Twitter account than others, as well as the option to book in advance on own website.



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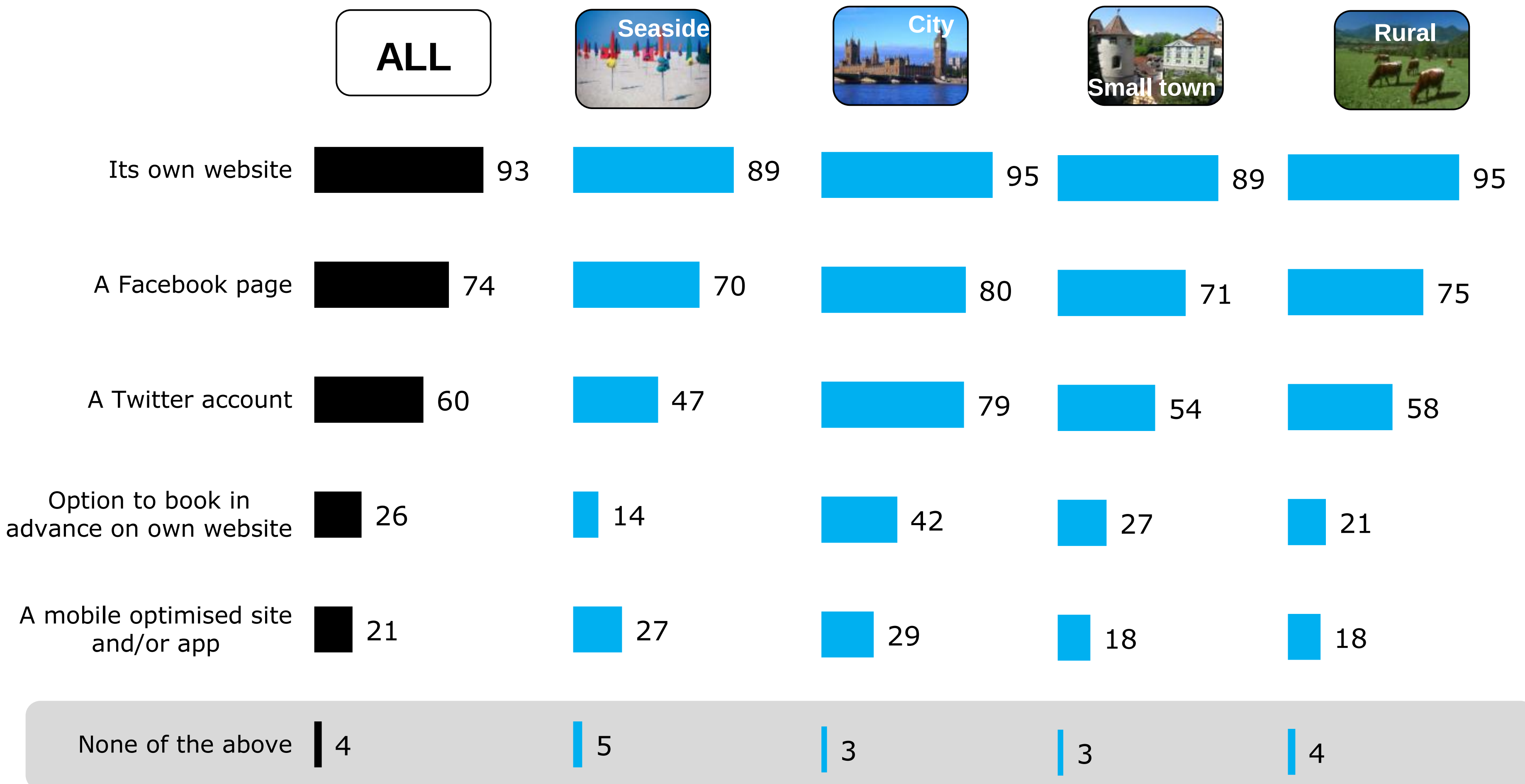
Q16a

Online communications / access

Most attractions have their own website regardless of location, but seaside and more rural attractions are less likely to have more ‘advanced’ options such as being able to book online in advance on own website and having a mobile optimized site and/or app. The majority of attractions across all locations have a Facebook page.



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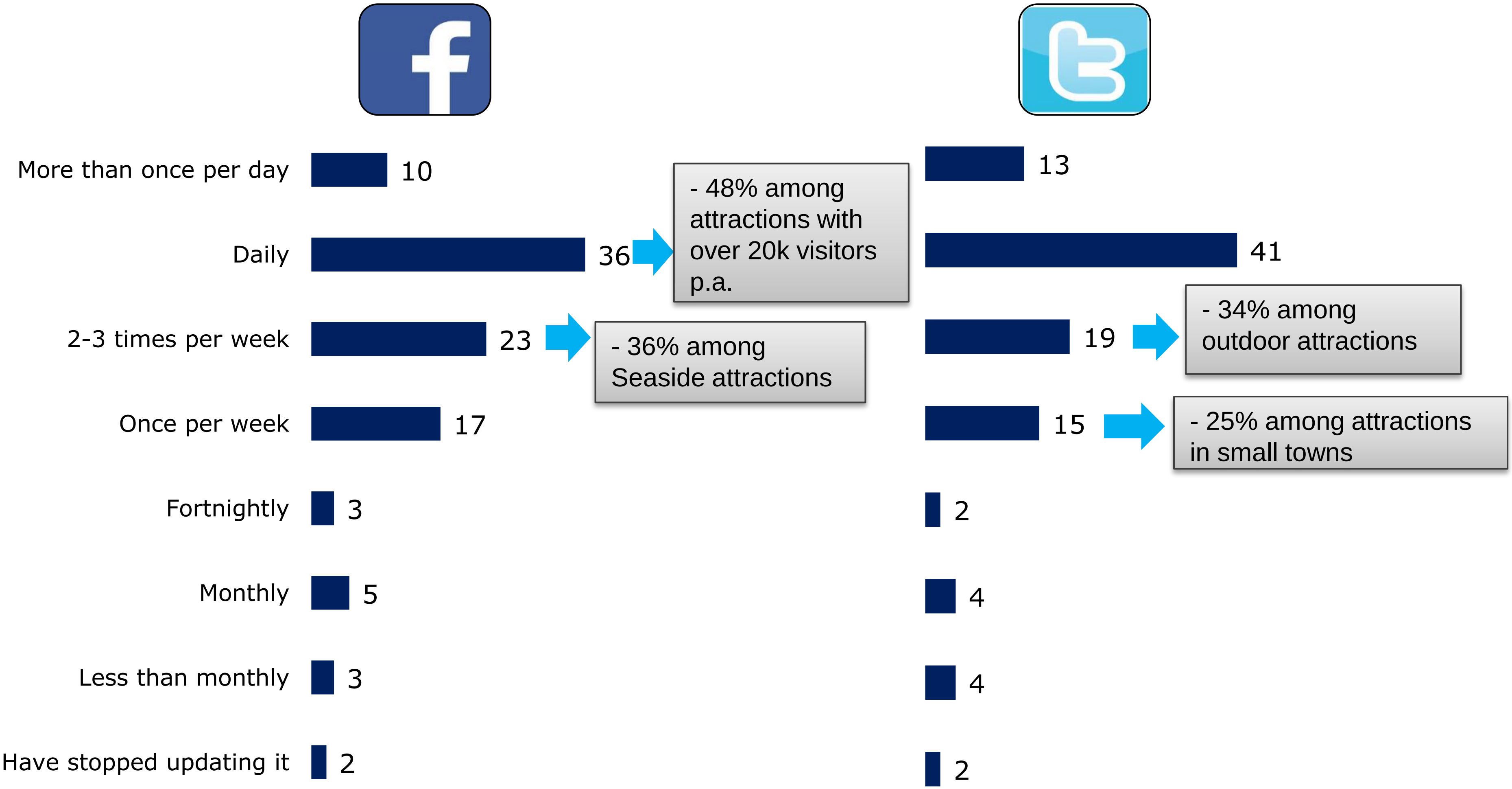
Q16a

Frequency of updating Facebook / Twitter business accounts

The vast majority of attractions update their Facebook and/or Twitter business accounts at least once per week. Larger attractions update their Facebook accounts more frequently, with almost half (48%) doing this daily. Over a third of outdoor attractions update their Twitter account 2-3 times a week.



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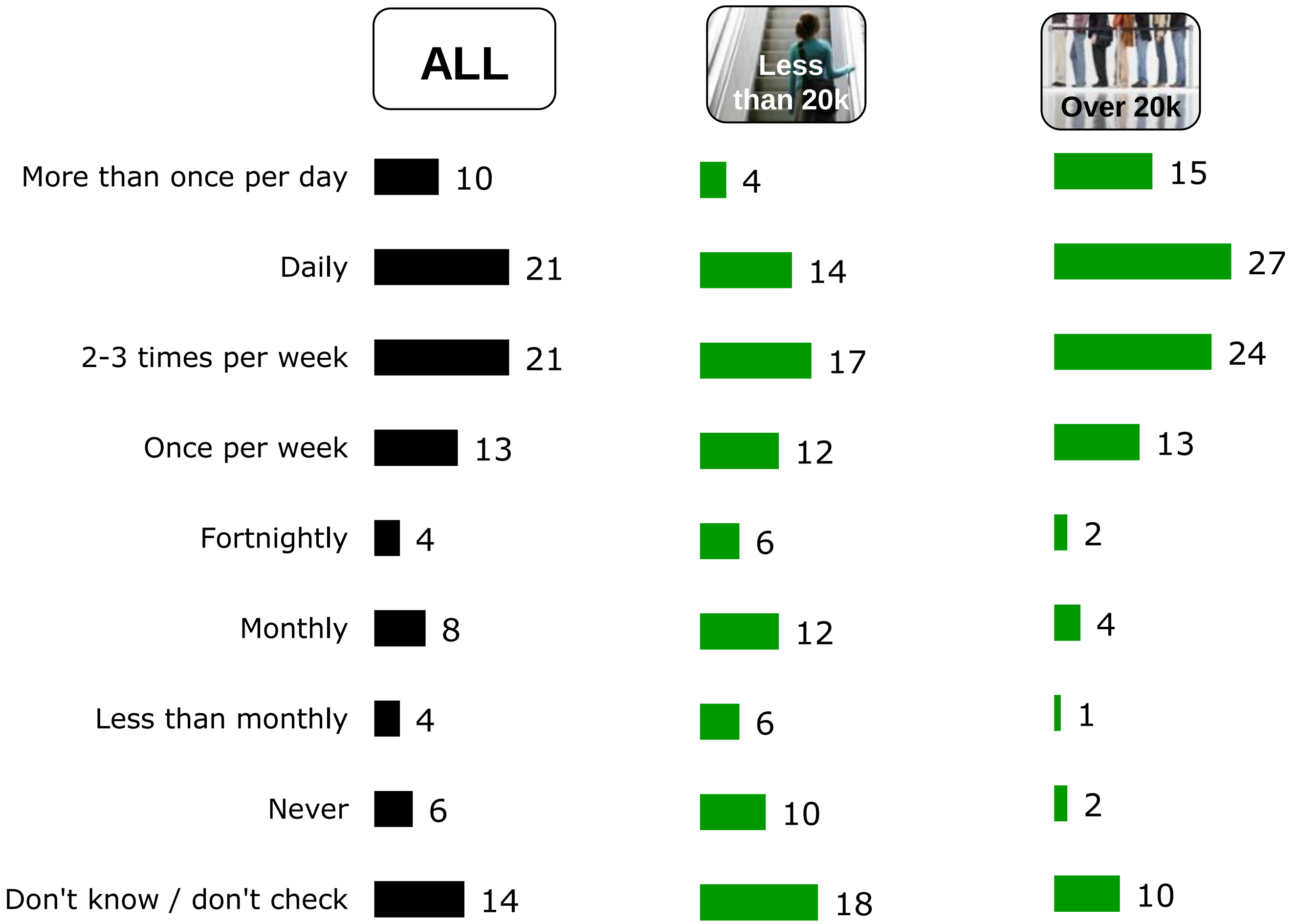
Q16a

Frequency of online customer feedback

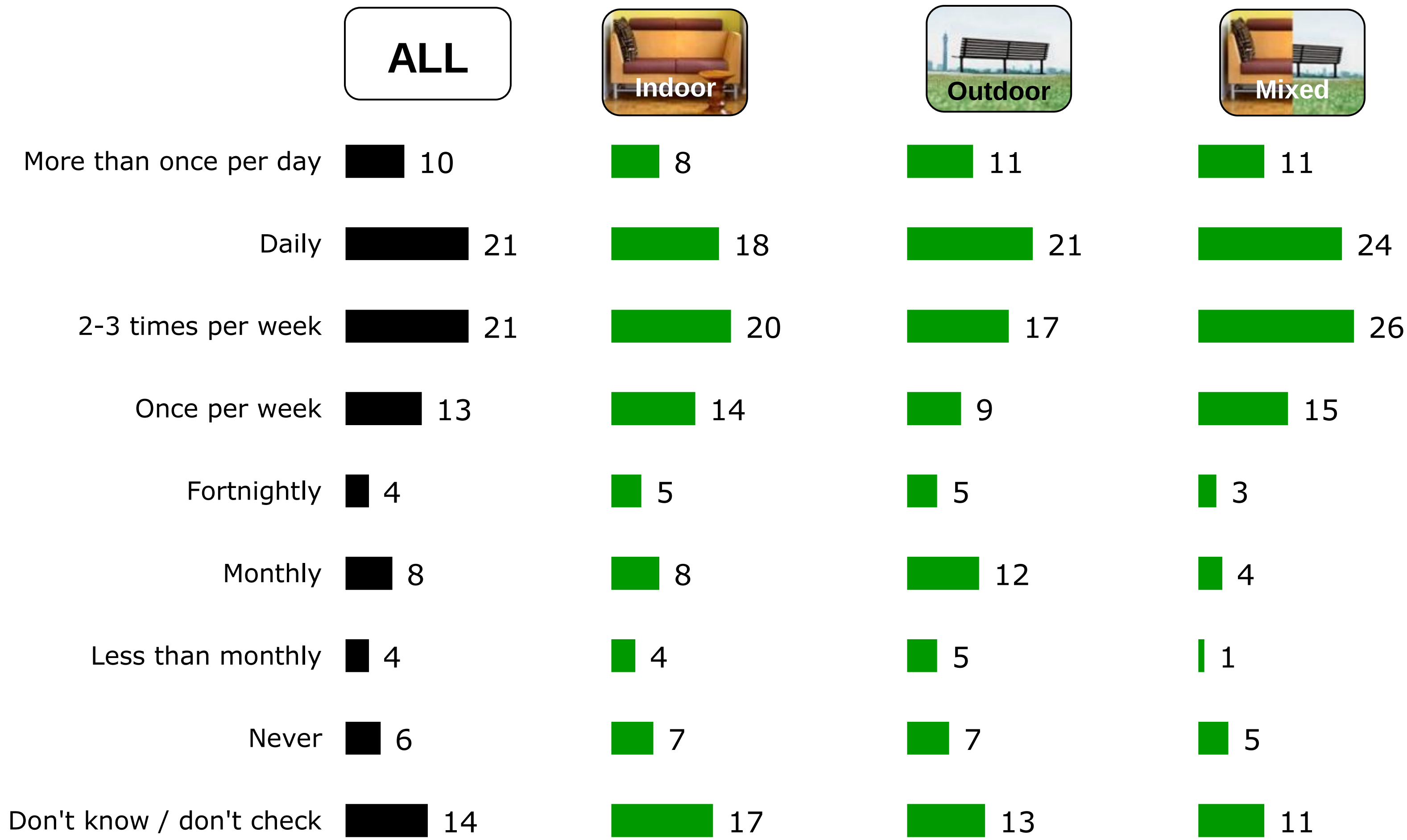
Larger attractions receive online customer feedback more frequently, perhaps both because of their stronger online presence (across all electronic media) as well as due to having more visitors.



Q16a

Frequency of online customer feedback

Frequency of online customer feedback doesn't differ greatly between indoor and outdoor attraction types. The majority receive feedback at least once a week.



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Q16a

Frequency of online customer feedback

More than one fifth of seaside attractions receive online customer feedback more than once a day, whilst only 8% of attractions in cities do. Most online feedback is received daily or 2-3 times per week across all locations.

	ALL	Seaside	City	Small town	Rural
More than once per day	10	23	8	10	7
Daily	21	15	27	20	20
2-3 times per week	21	14	24	18	23
Once per week	13	7	16	11	13
Fortnightly	4	4	1	5	6
Monthly	8	11	5	11	7
Less than monthly	4		4	5	4
Never	6	12	3	6	6
Don't know / don't check	14	14	12	16	14

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Q16a


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Performance and confidence snapshot: July 2014

		Visitor Numbers (July)			Confidence (End of school summer holidays)	
		Up	Same	Down	Very	Very / fairly
	TOTAL (%)	52	27	21	35	93
Visitor numbers per annum (%)	Less than 20k	41	32	27	31	88
	20k or over	61	23	16	38	98
	20k-50k	47	32	20	*38*	*100*
	50k-100k	69	15	16	*38*	*97*
	Over 100k	71	17	12	*38*	*96*
Type (%)	Indoor	47	30	22	35	91
	Outdoor	56	25	19	36	94
	Mixed	53	25	22	33	96
Charge (%)	Paid	55	20	25	32	92
	Free	47	37	16	38	94
VAQAS (%)	Yes	66	20	14	33	98
	No	47	29	23	35	92
Location (%)	Seaside	47	37	16	40	100
	Large town / city	51	25	24	41	91
	Small town	45	31	24	42	91
	Rural	57	22	20	26	93