

Tourism Business Monitor 2014

Visitor Attractions Report

Wave 2 – Post-Easter
holidays



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:

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

July 2012: 16-24 July 2012, reviewing the period after the Jubilee bank holiday weekend until mid July

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.

A more clement , later Easter period and improved economic environment appears to have boosted visitor numbers and buoyed confidence for the majority of attractions for the rest of 2014, despite the floods at the start of the year.

Almost 6 in 10 attractions reported an increase in visitor figures for the Easter period compared with the same time last year, when the coldest Easter on record (*BBC News online, 31st March 2013*) had a negative effect on numbers visiting.

Improved weather and a later Easter period this year may well have played a part in the 6% increase in visitor numbers for this latest period compared with this same period last year. The positive effects from this latest period have buoyed the year-to-date visitor figures also, with attractions reporting an overall increase in visitor figures of 3%.

Attractions benefited most from an increase in local and domestic visitors in 2014 so far, whilst those reporting increases in overseas visitors were less pronounced, particularly amongst smaller and free attractions, both of whom actually saw a slight decrease.

After the disappointing Easter performance last year, all business types are reporting higher numbers of visitors this year, which has resulted in greater levels of satisfaction. Smaller sites, and those based in large towns / cities are feeling slightly more disappointed, with less than half claiming to be “very satisfied” with their recent business performance.

The effect of the floods was, unsurprisingly, felt most acutely amongst outdoor and seaside attractions. 65% of seaside attractions were affected by the floods, with almost half (46%) saying they caused damage to the local area and 44% saying the floods caused damage to their property or business. 59% of outdoor attractions claimed the floods affected their business in some way also.

The effect of the floods for seaside and outdoor attractions has had a negative effect on their visitor figures for 2014 so far, and consequently on outlook on business performance for 2014 as a whole. However, overall, the majority of attractions feel that the floods will have little to no effect on their business performance for the year (71%).

Confidence levels for mixed indoor/outdoor attractions are much improved on 2013, and on the same period last year. The approach to Spring/Summer and warmer weather seems to have buoyed confidence amongst businesses in all location types also.

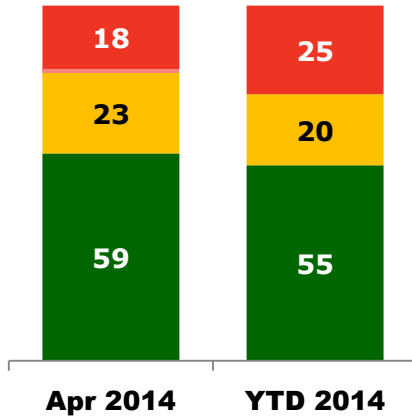
Business Dashboards



Business Performance Dashboard: Attractions

VISITOR NUMBERS

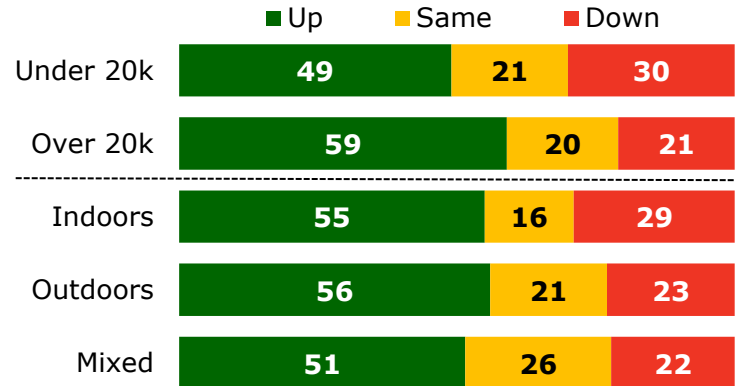
Visitor numbers (%)



Versus same period previous year...

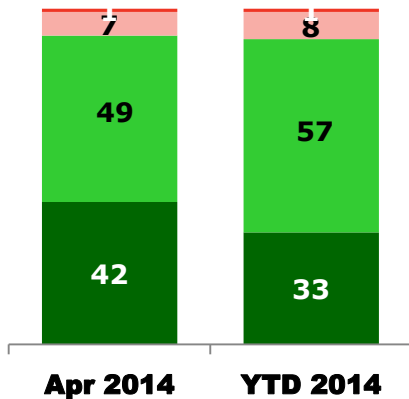


Visitor numbers for Easter 2014 with same period 2013 (%)

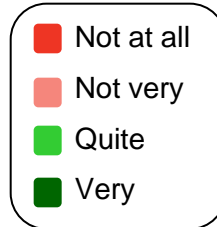


SATISFACTION

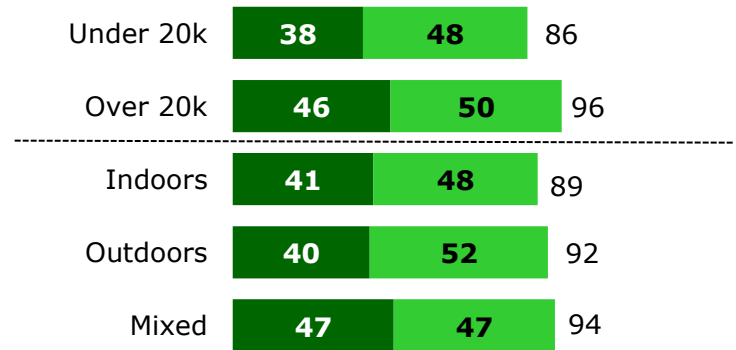
Satisfaction (%)



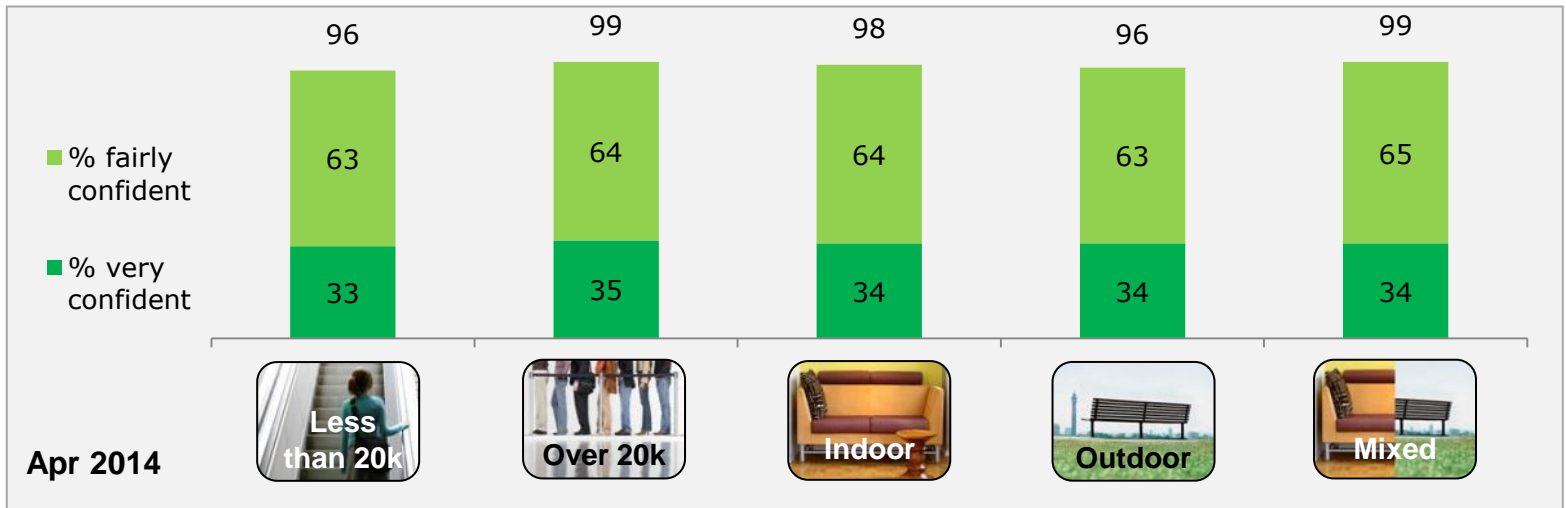
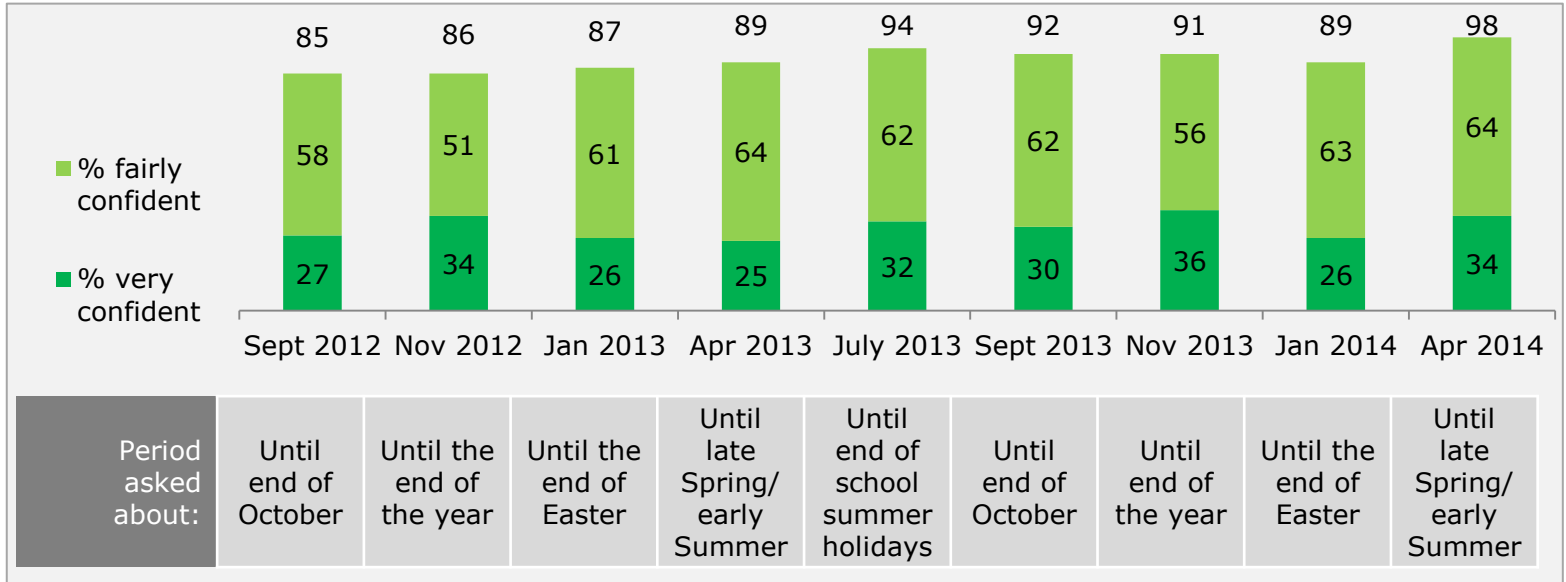
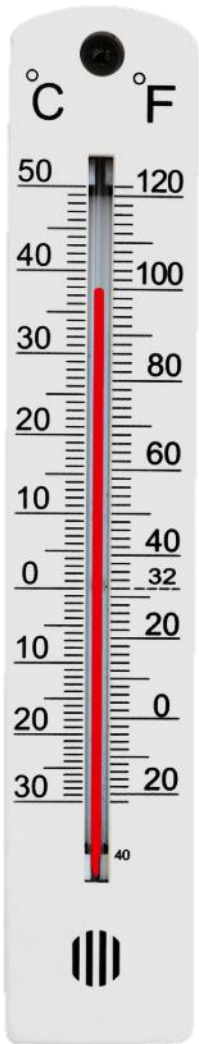
Satisfied with business performance...



Satisfaction with Performance during Easter period (%)



Business Confidence Dashboard: Attractions



PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
 Apr 2014: Up until late Spring / early Summer

Visitor Profile



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

■ Up
 ■ Same
 ■ Down

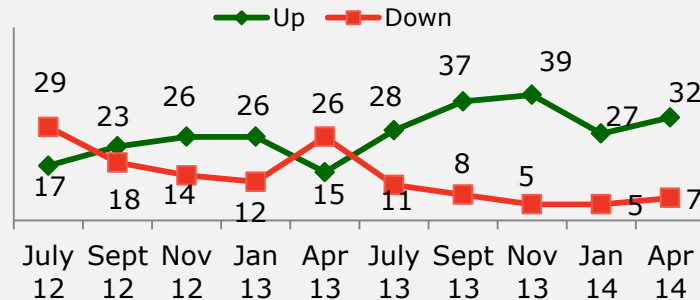
NET:
Up - Down



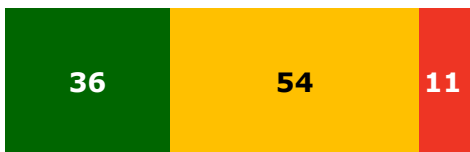
Apr 14



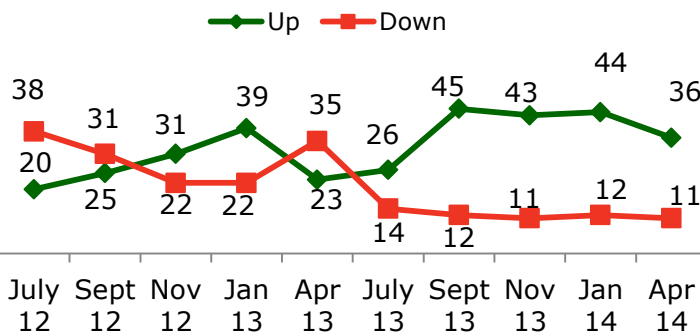
+25



Apr 14



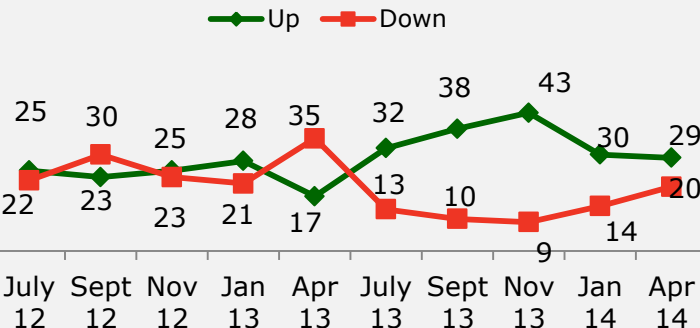
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Apr 14

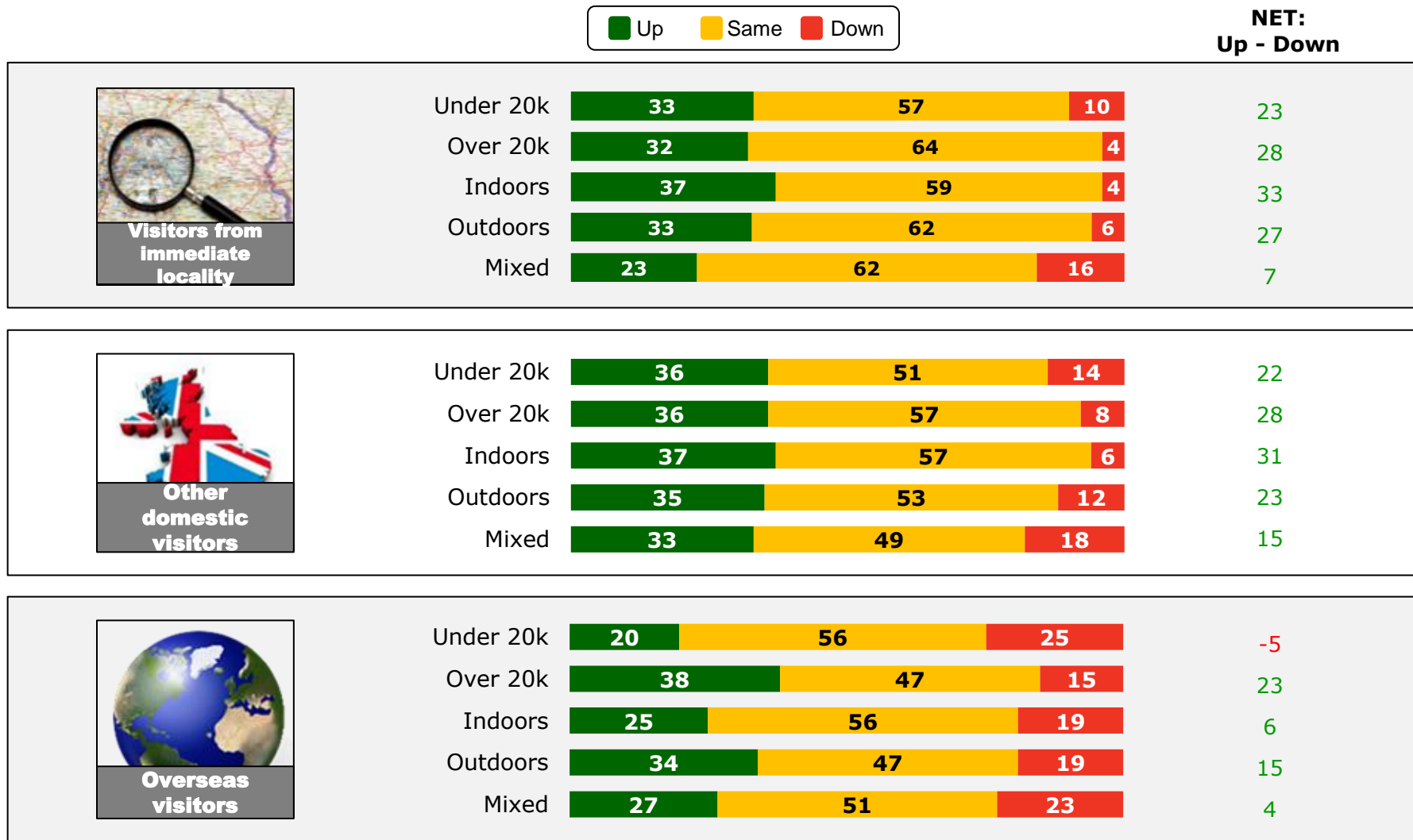


+9



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

Visitor numbers are up across all visitor profiles, with the exception of smaller attractions who have seen a slight dip in overseas visitors

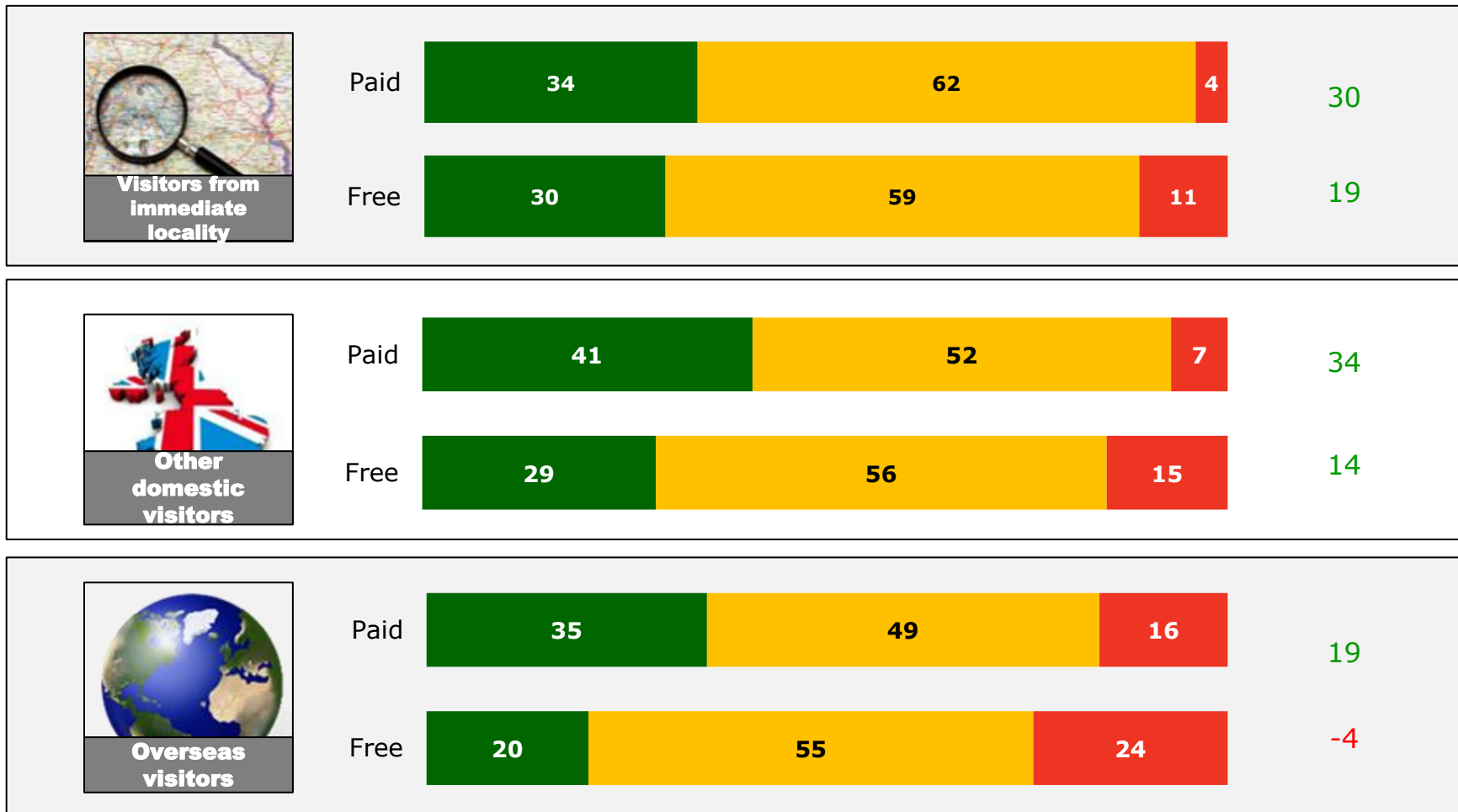


Changing Visitor Profile (year-to-date vs. previous year): Charging

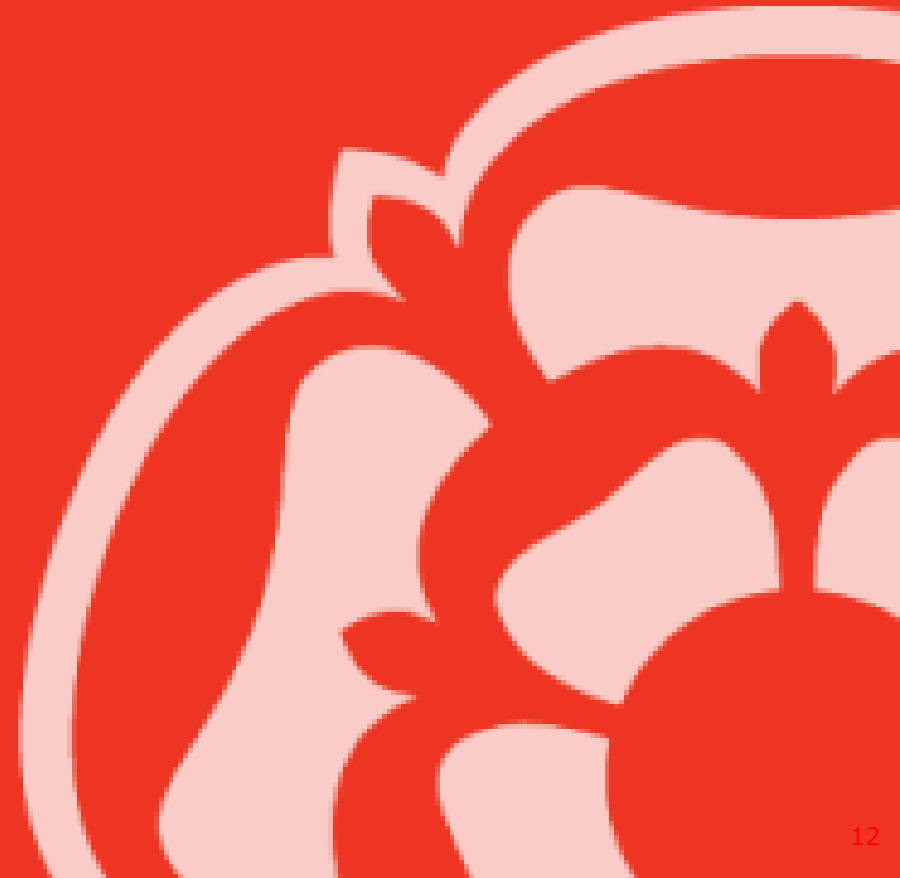
Paid attractions in particular have seen an increase in all visitor types, whilst free sites have noted a slight decrease vs. the same period last year in overseas visitors

■ Up
 ■ Same
 ■ Down

**NET:
Up - Down**

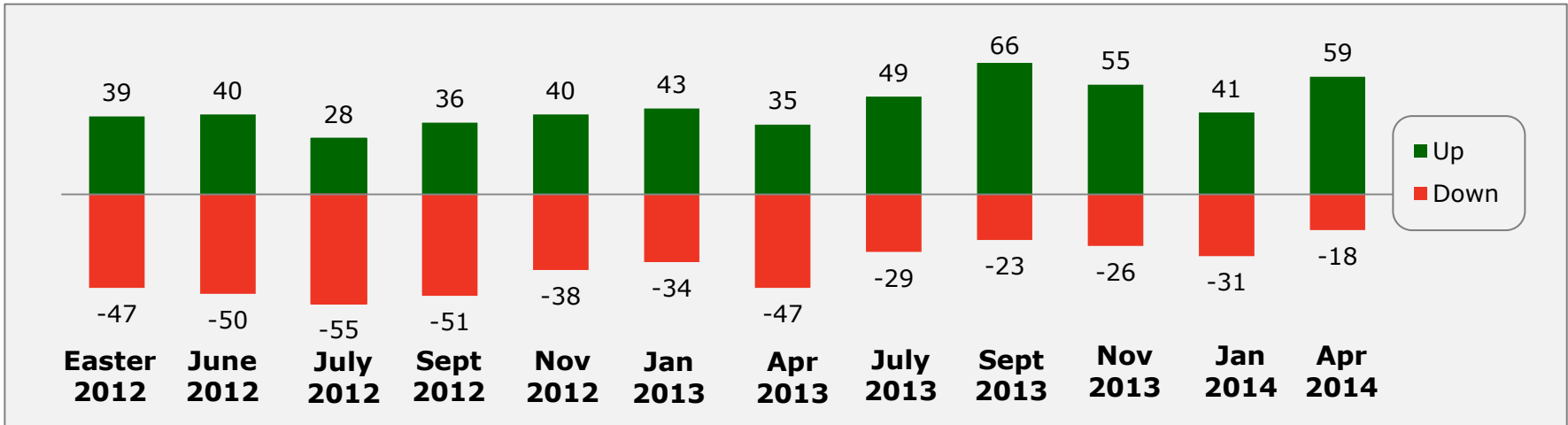
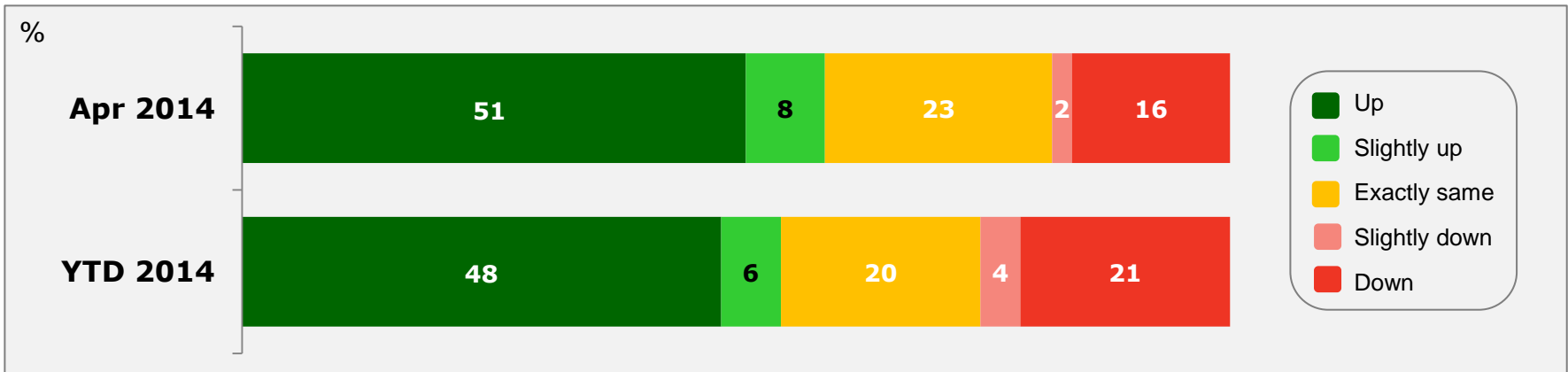


Past Performance



Visitor numbers: Year-on-year changes

The improved weather over Easter this year has had a notable impact on visitor figures, with well over half (59%) of respondents reporting that visitor numbers are up for this period, compared with just 35% this same time last year. This in turn has boosted the year-to-date figures.

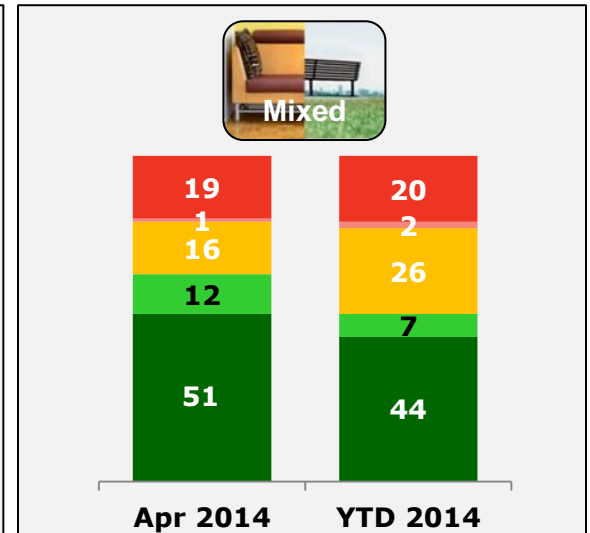
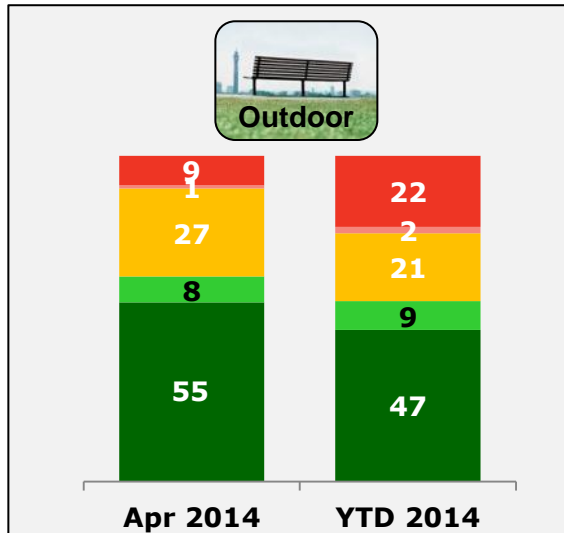
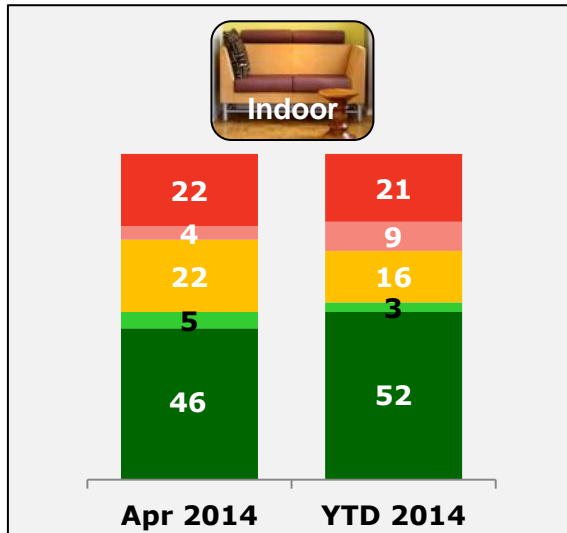
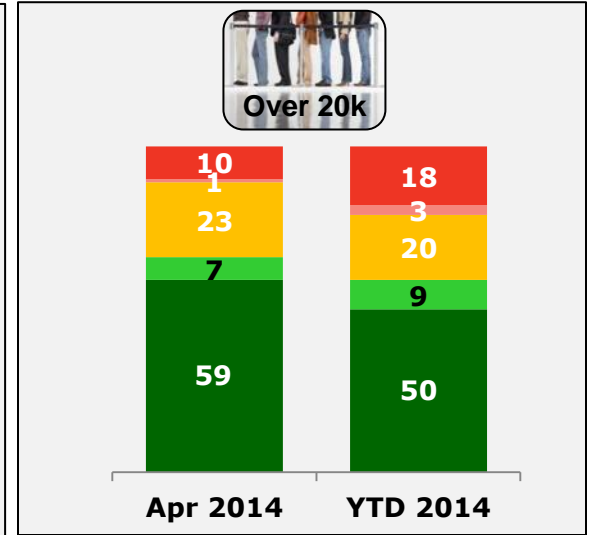
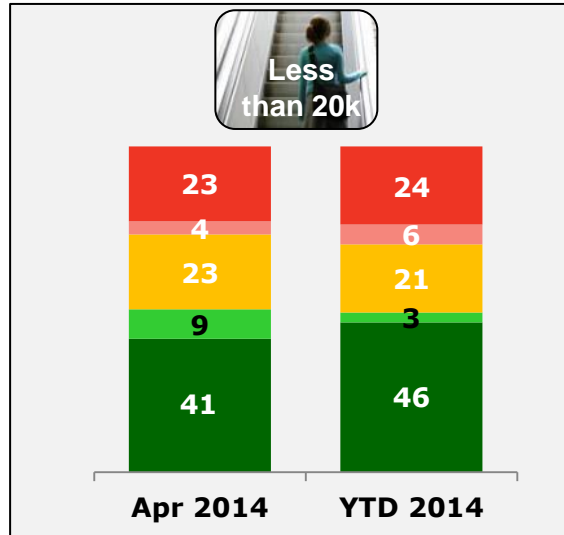
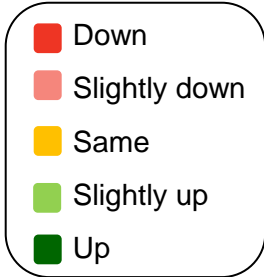


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

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/ July 2013: After Easter holidays until mid-July

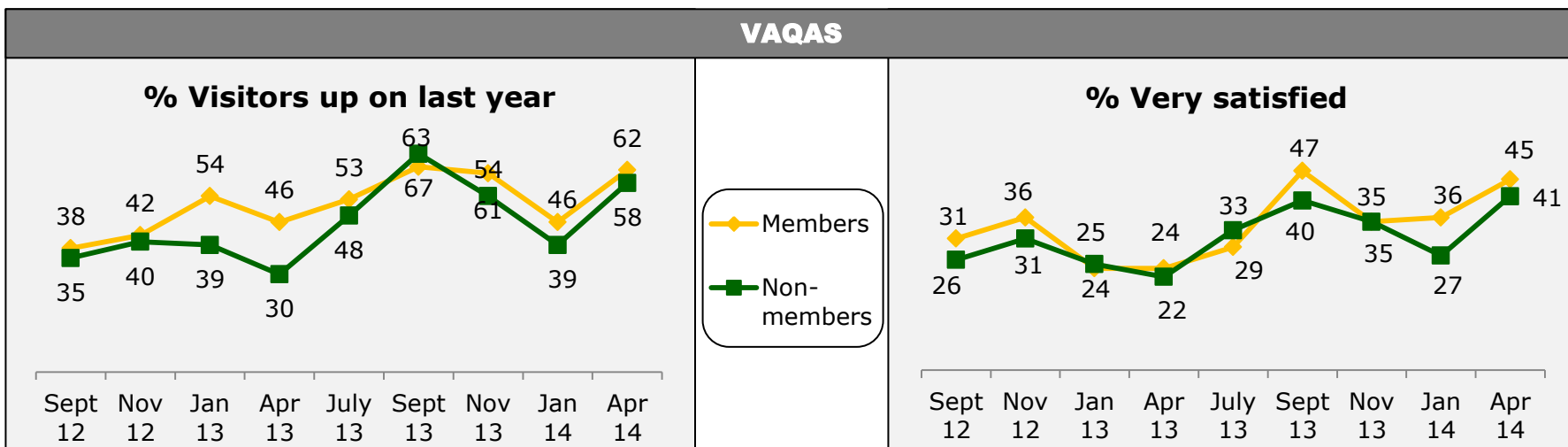
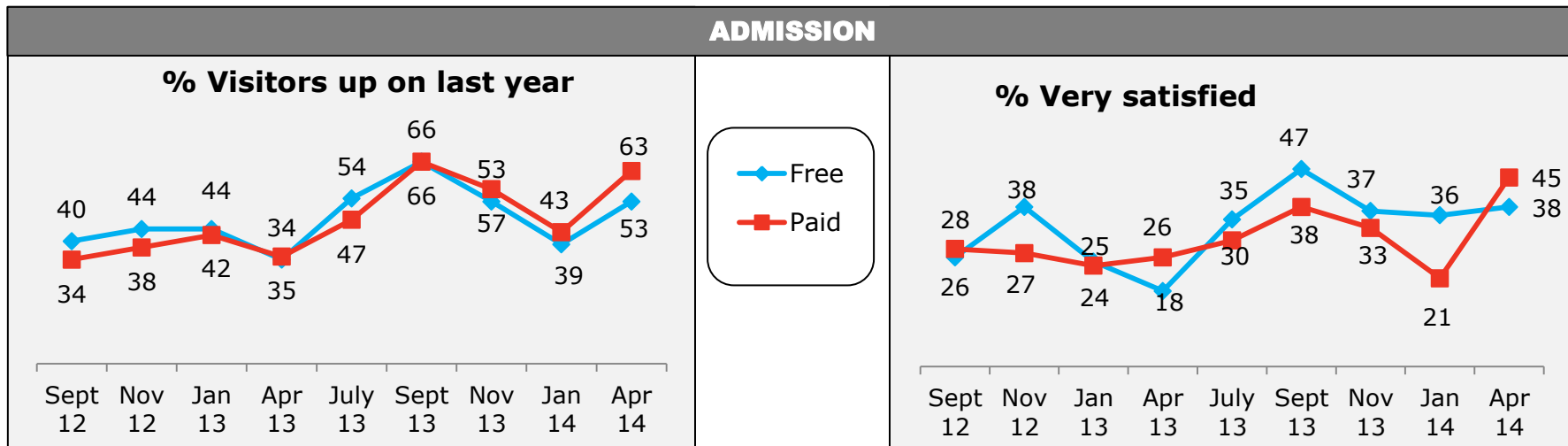
Visitor numbers: Year-on-year changes by attraction type

Larger and outdoor attractions have benefitted most from the improved weather and later Easter this year, whilst the year-to-date visitor figures are relatively strong across the board, despite the floods at the start of the year.



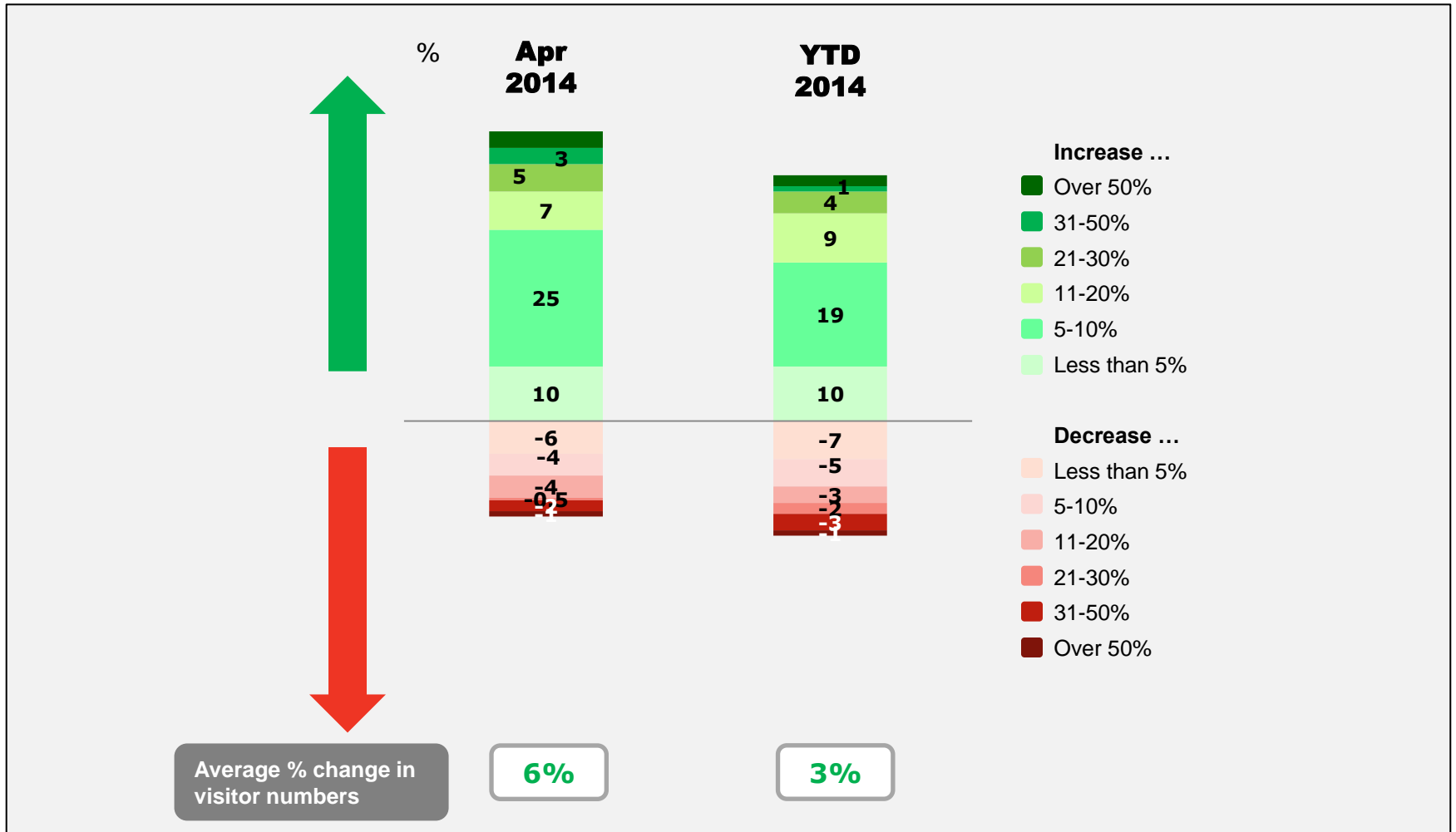
Changing business performance: By admission charge and VAQAS

After the disappointing Easter performance last year, all business types are reporting higher numbers of visitors this year, which has resulted in greater levels of satisfaction.



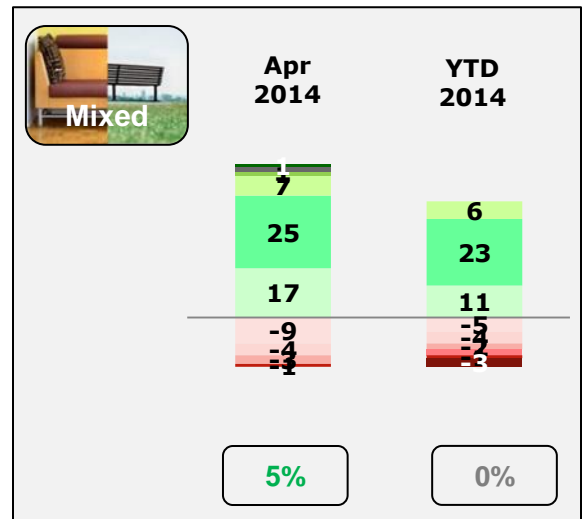
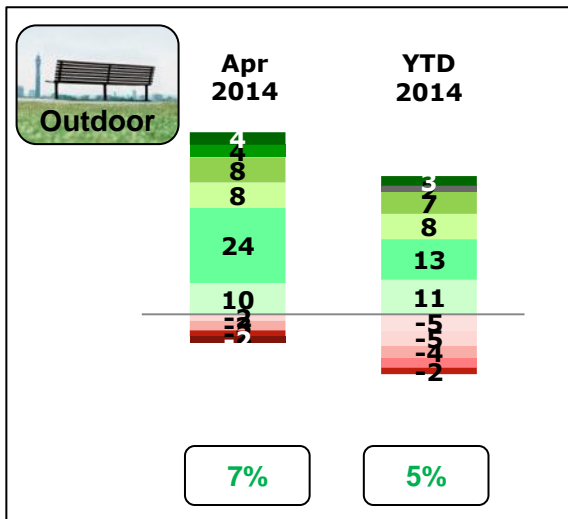
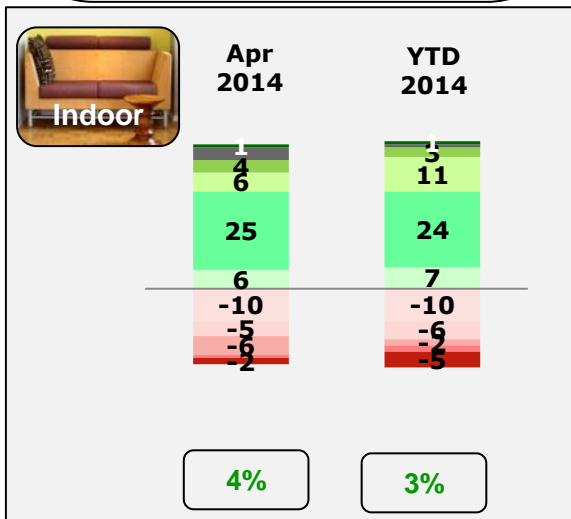
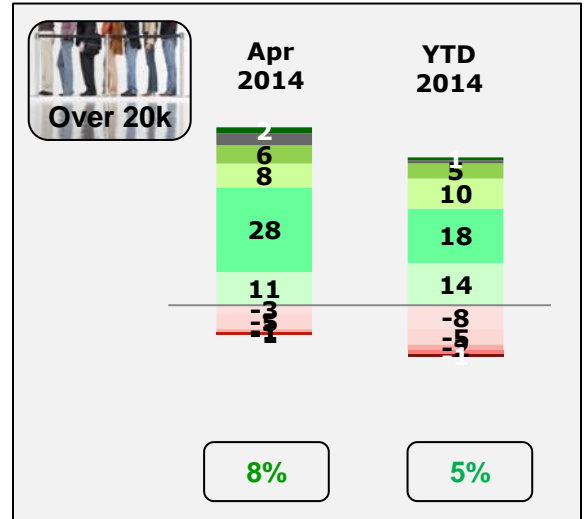
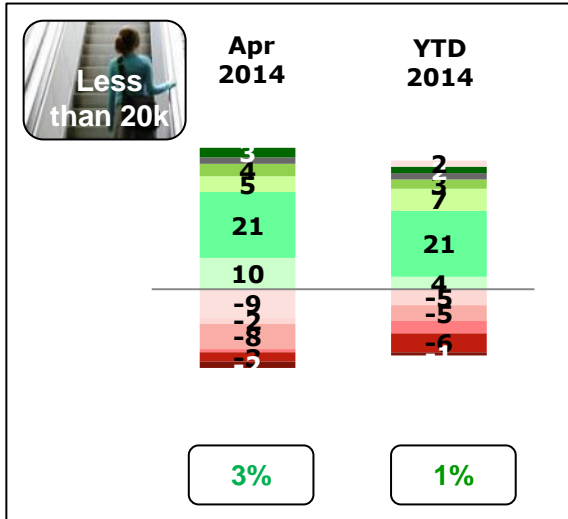
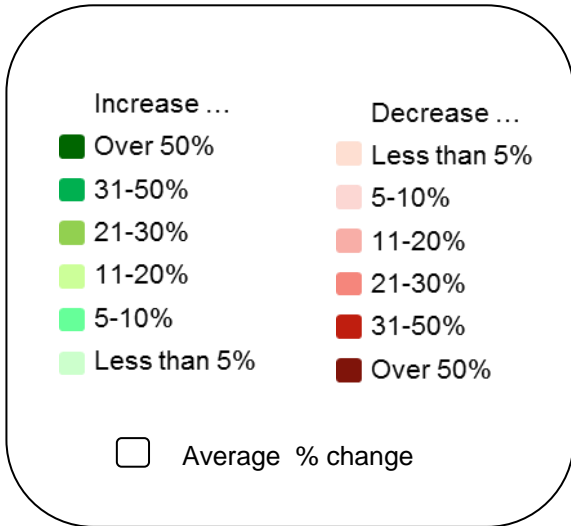
Visitor Numbers: Year-on-year changes (%)

Visitors numbers for 2014 so far are looking positive, with an average increase of 3%. Improved weather during the Easter period may well have played a part in the 6% increase in visitor numbers for this latest period compared with this same period last year.



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

Although the year-to-date visitor figures for mixed indoor/outdoor attractions remains unchanged compared with last year, there are increases across all other business types. Larger and outdoor attractions have seen the largest increases in visitor figures, at 8% and 7% respectively; likely benefitting from the later, more clement Easter.



Positive verbatim comments on business performance



The economic climate is improving; people are more happy to spend

Lots of new stock and keeping the quality of the products high

More people are aware that we are here and families are looking for cheap days out and we are good value for money

Better publicity and improved facilities has helped our business

The new café and improved website attracted more visitors - also a higher profile in the local press helps

Because we have made ourselves more approachable and visible, as well as more accessible



Negative verbatim comments on business performance

Weather's been quite bad - weather is a massive factor and if it's raining people don't want to come

The reports on the flooding in Somerset have given the wrong impression of the area, and we have not had enough publicity with leaflets

Road works mean the main streets are impossible at the moment - it puts people off from coming in

The weather, we had storms throughout January so people didn't really want to go outside

I think because the Easter holidays were late schools went back straight after the bank holiday so we did not see so many visitors

Case Study: Winchester Science Centre & Planetarium

Increase in visitors figures for the latest period compared with last year

As an educational charity, the **schools market is really important to us**. We offer workshops, stage shows and planetarium shows for ages from reception to A-level, including **bespoke offers** for older groups and special needs audiences.

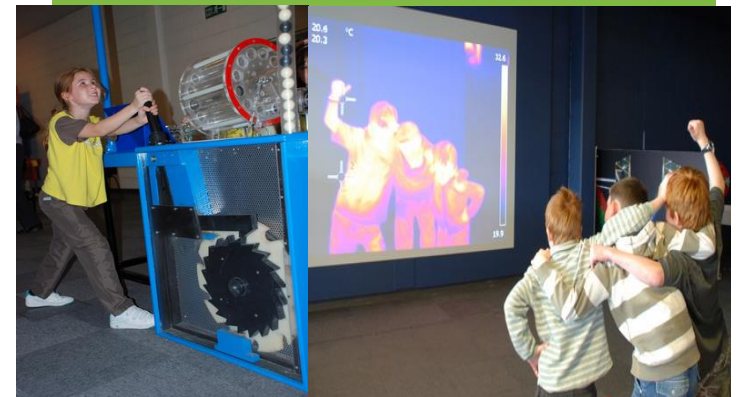
Most of our visitors are families but we put on regular **evening events** for adults. Special **weekend and holiday events** help to create a **more impactful visit experience** and encourage repeat visits.

We are **active on Twitter and Facebook**, use local print media and have hosted both local and national **TV news**. We recently hosted BBC Children in Need which also helped to **raise our profile**.

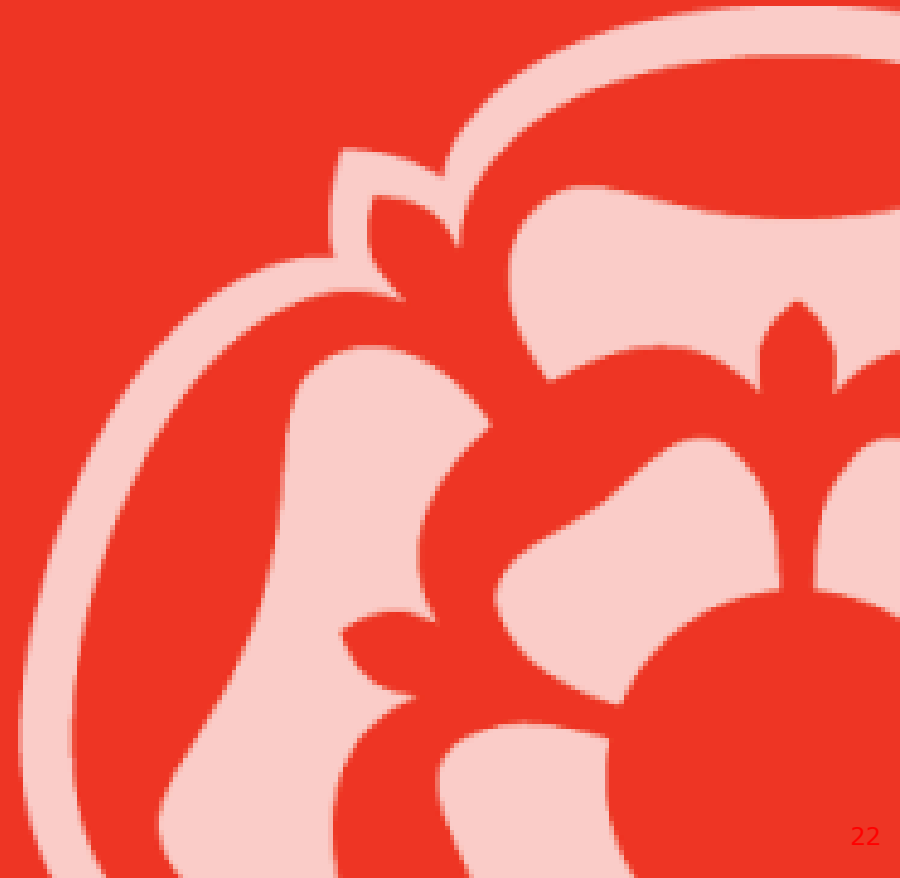
We are currently implementing a new barrier system that will allow us to sell the planetarium as a separate attraction and create a smarter entrance area. Having an **ongoing process of change** ensures that we keep on striving towards our goal of **offering a high quality, world-class visitor experience**.

Having an ongoing process of change and an ethic of striving to offer the best possible visitor experience means visitor numbers are **increasing year on year**

- ➔ **South-based science centre and planetarium**
- ➔ **Paid entry**

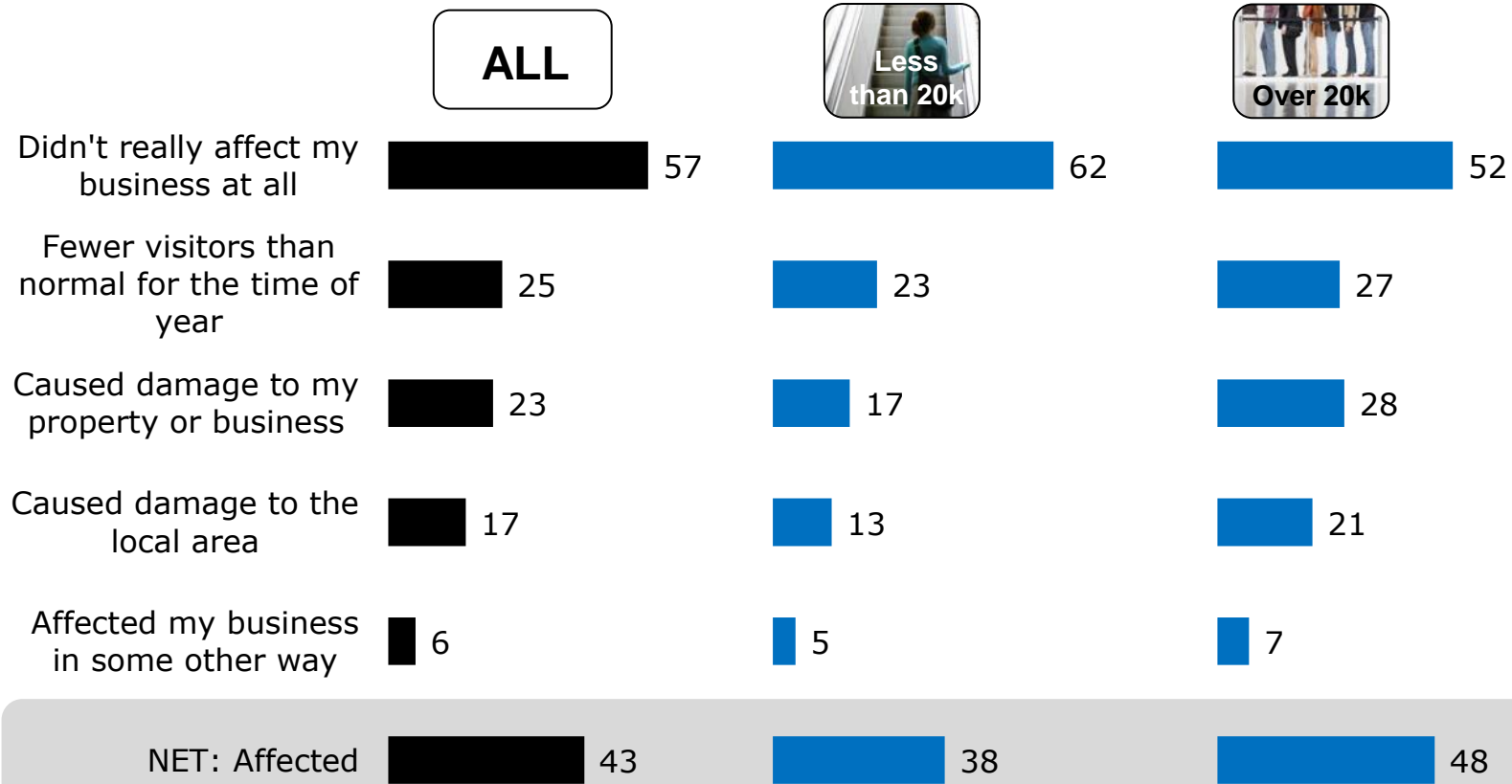


Impact of the floods



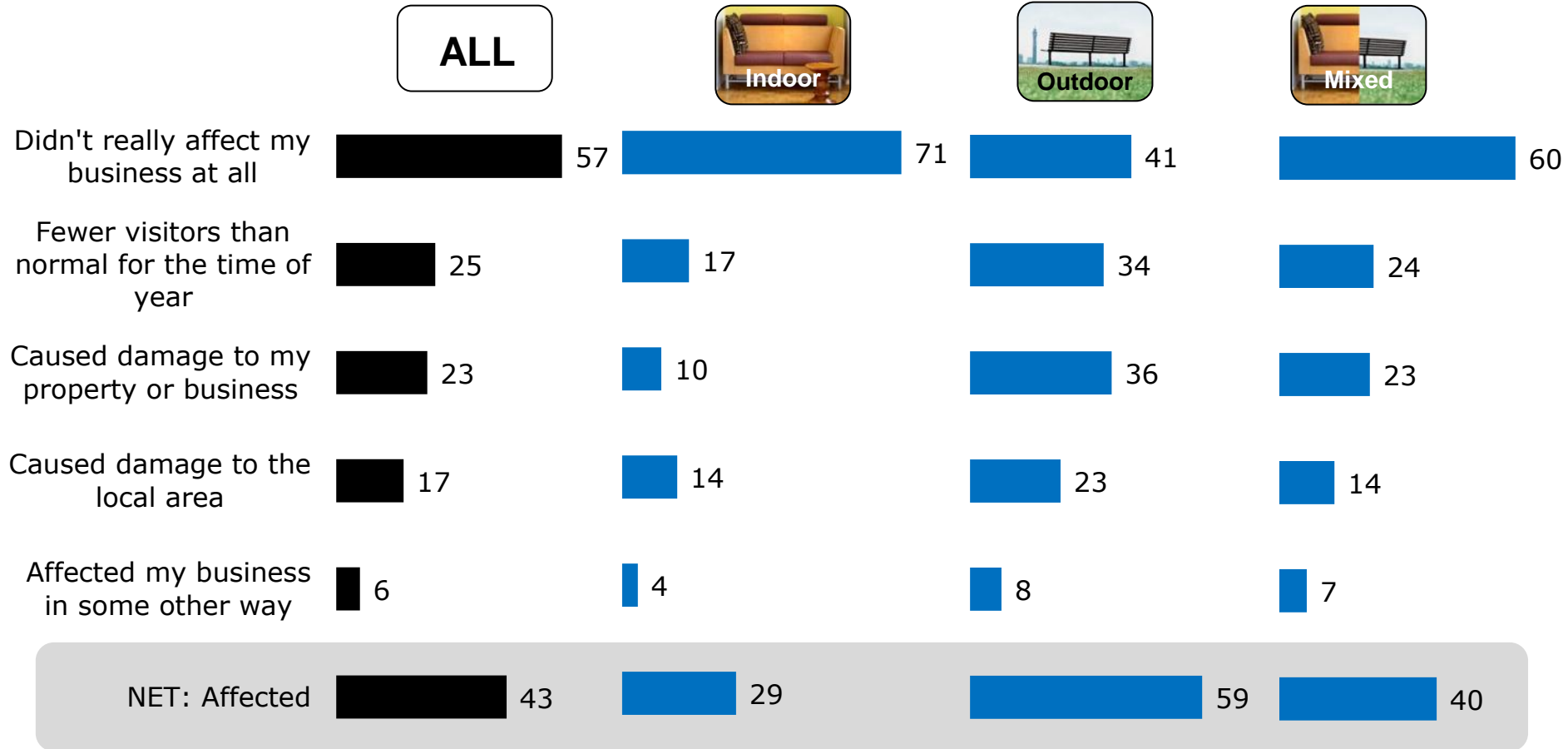
Effect of the floods 2014

The effect of the floods at the beginning of the year was more acutely felt by larger businesses, with more of these reporting fewer visitors than normal for the time of year, as well as saying the floods caused damage both to their property/business and the local area.



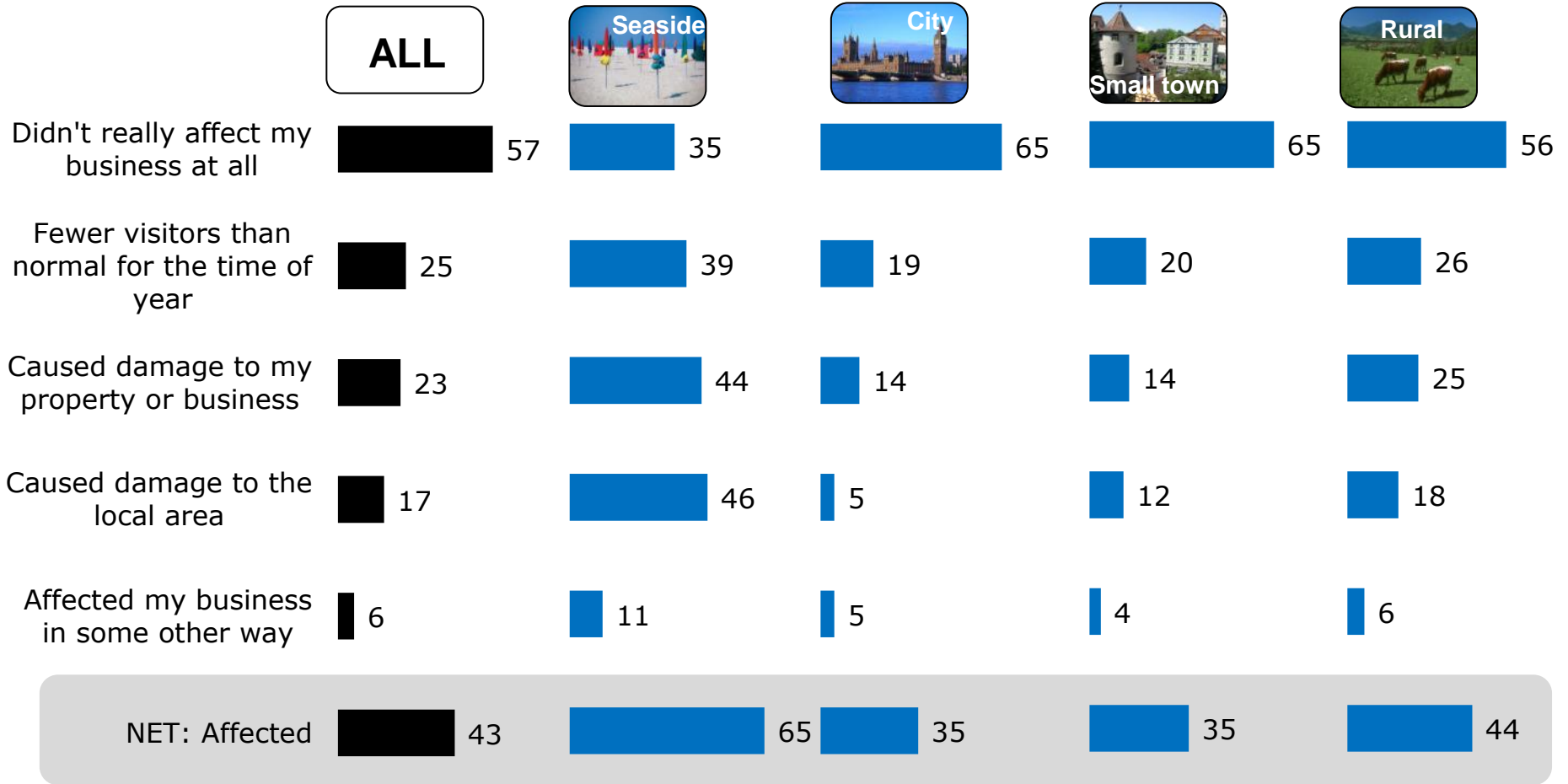
Effect of the floods 2014

Unsurprisingly, outdoor attractions were most affected by the floods, with 59% saying it affected their business directly. Just over a third saw fewer visitors than normal for the time of year, and 36% said it caused damage to their property or business, compared with just 10% of indoor attractions.



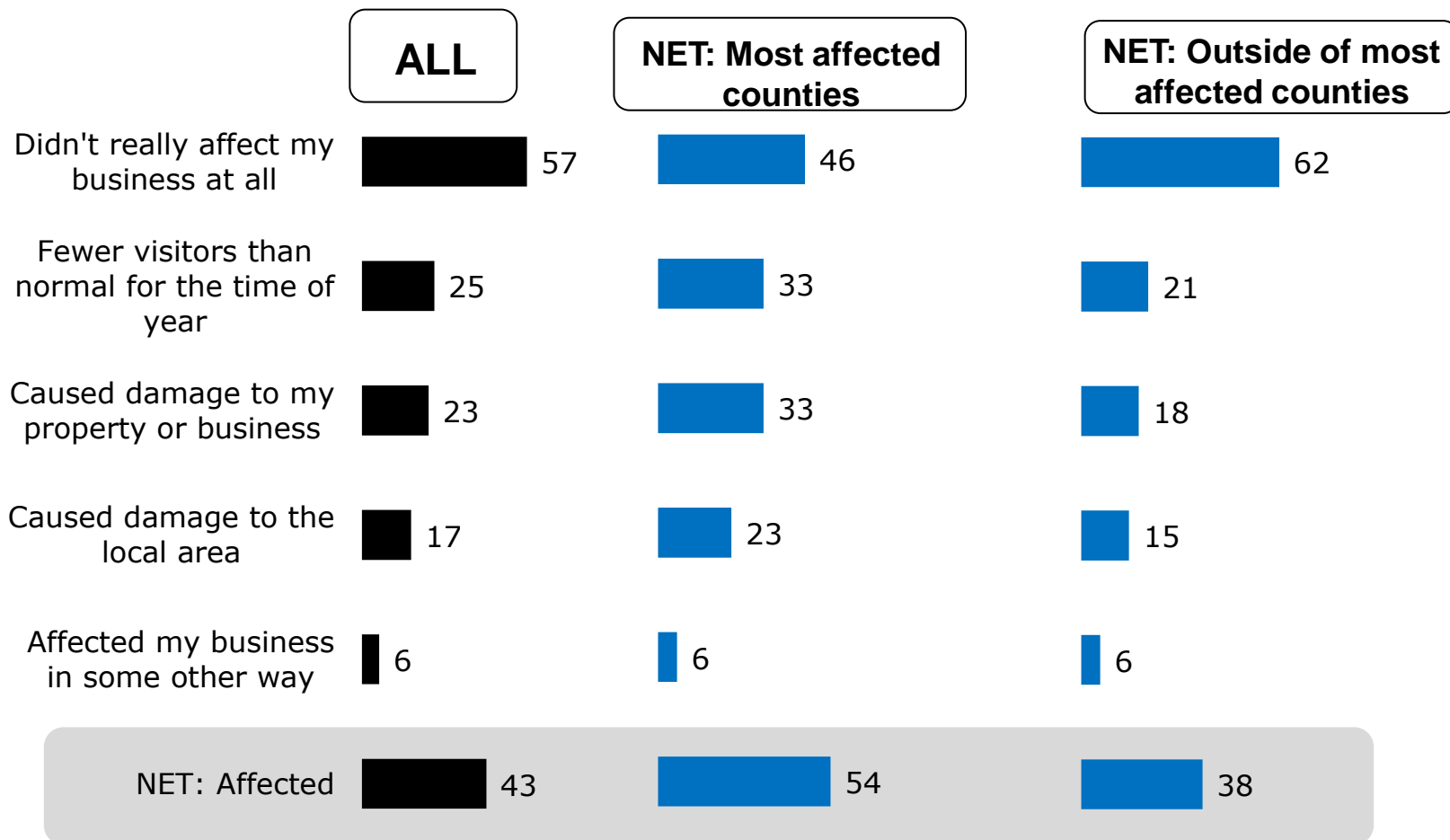
Effect of the floods 2014

65% of seaside attractions were affected by the floods, with almost half (46%) saying they caused damage to the local area and 44% saying the floods caused damage to their property or business. 1 in 4 rural attractions also had their property/business damaged by the floods and saw fewer visitors than normal.



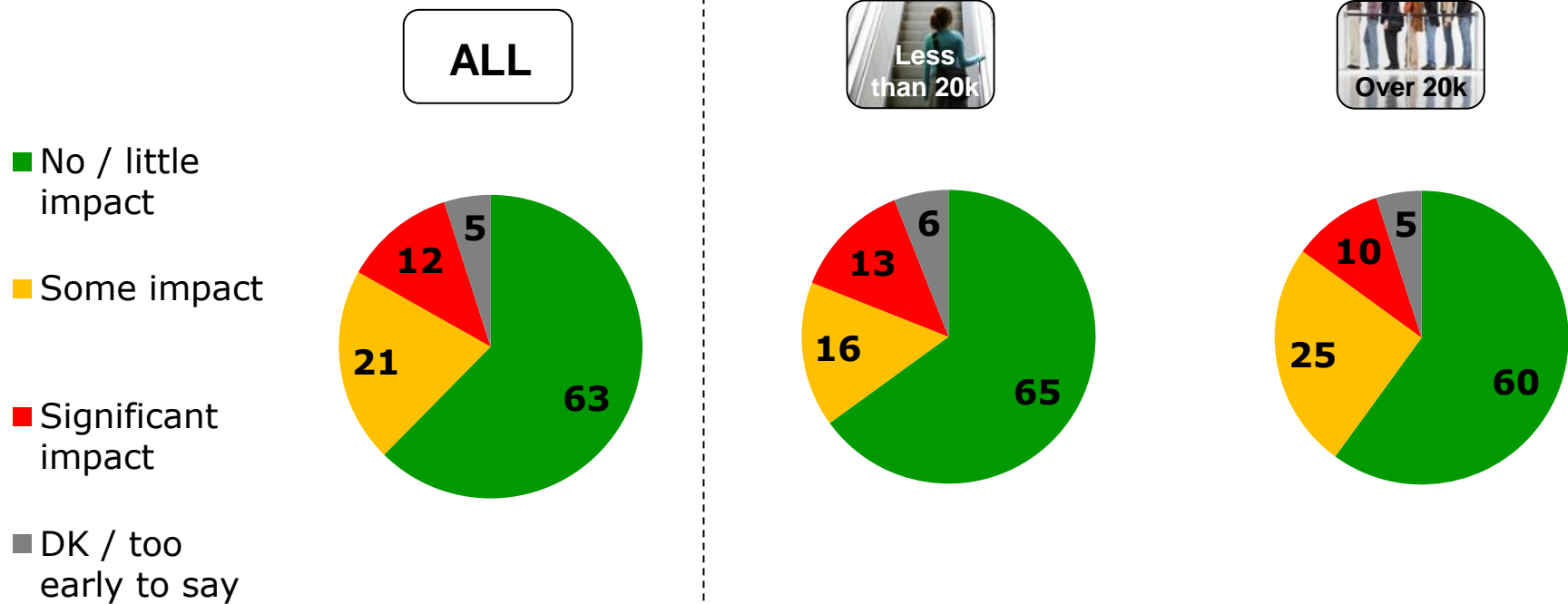
Effect of the floods 2014 – By county

For attractions in the worst affected counties, the most frequently cited issues were fewer visitors than normal for the time of year and that the floods caused damage to their property or business



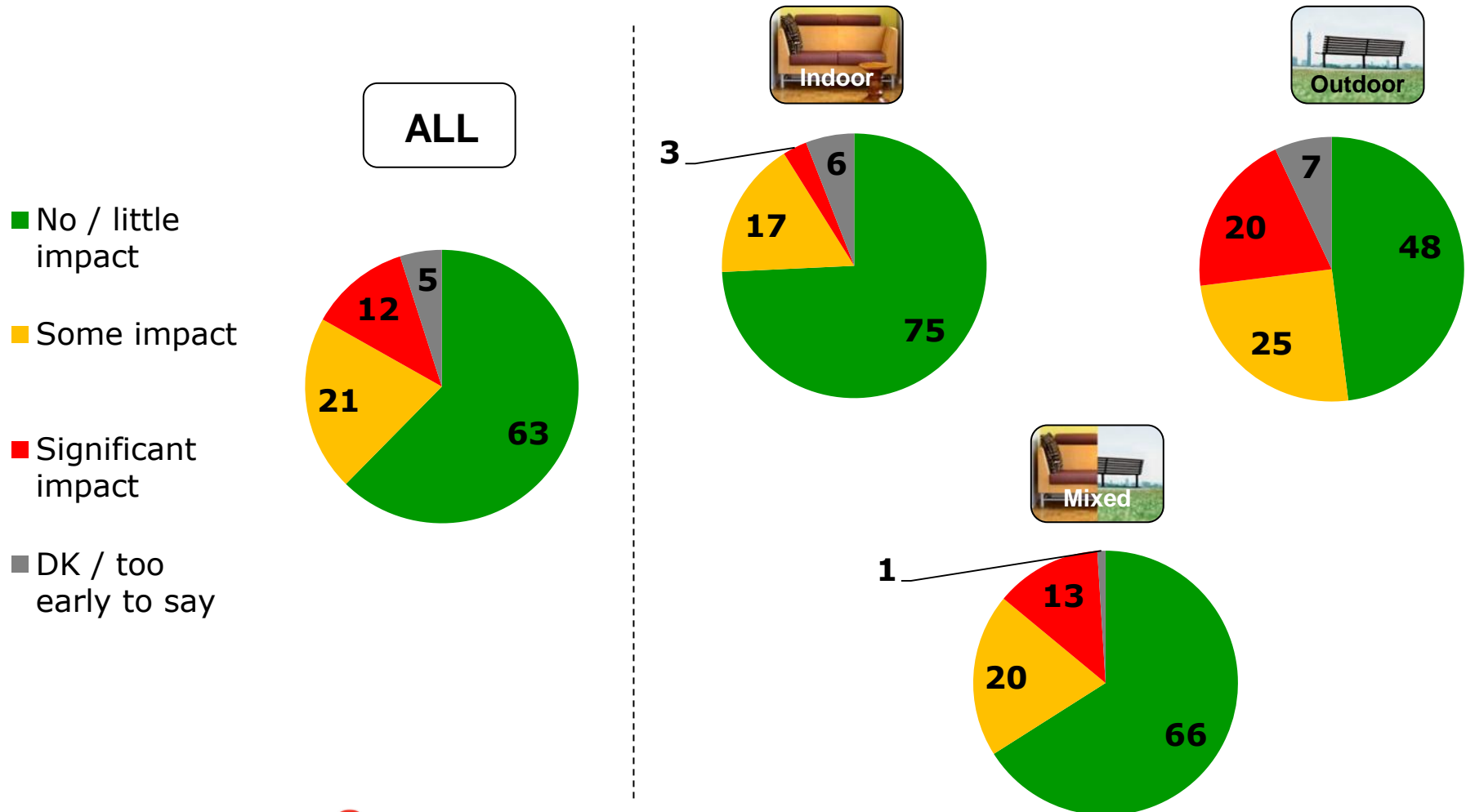
Floods – Impact on visitor numbers YTD 2014

One third of businesses reported at least some impact from the floods on visitor numbers, although they didn't appear to affect businesses by size differently.



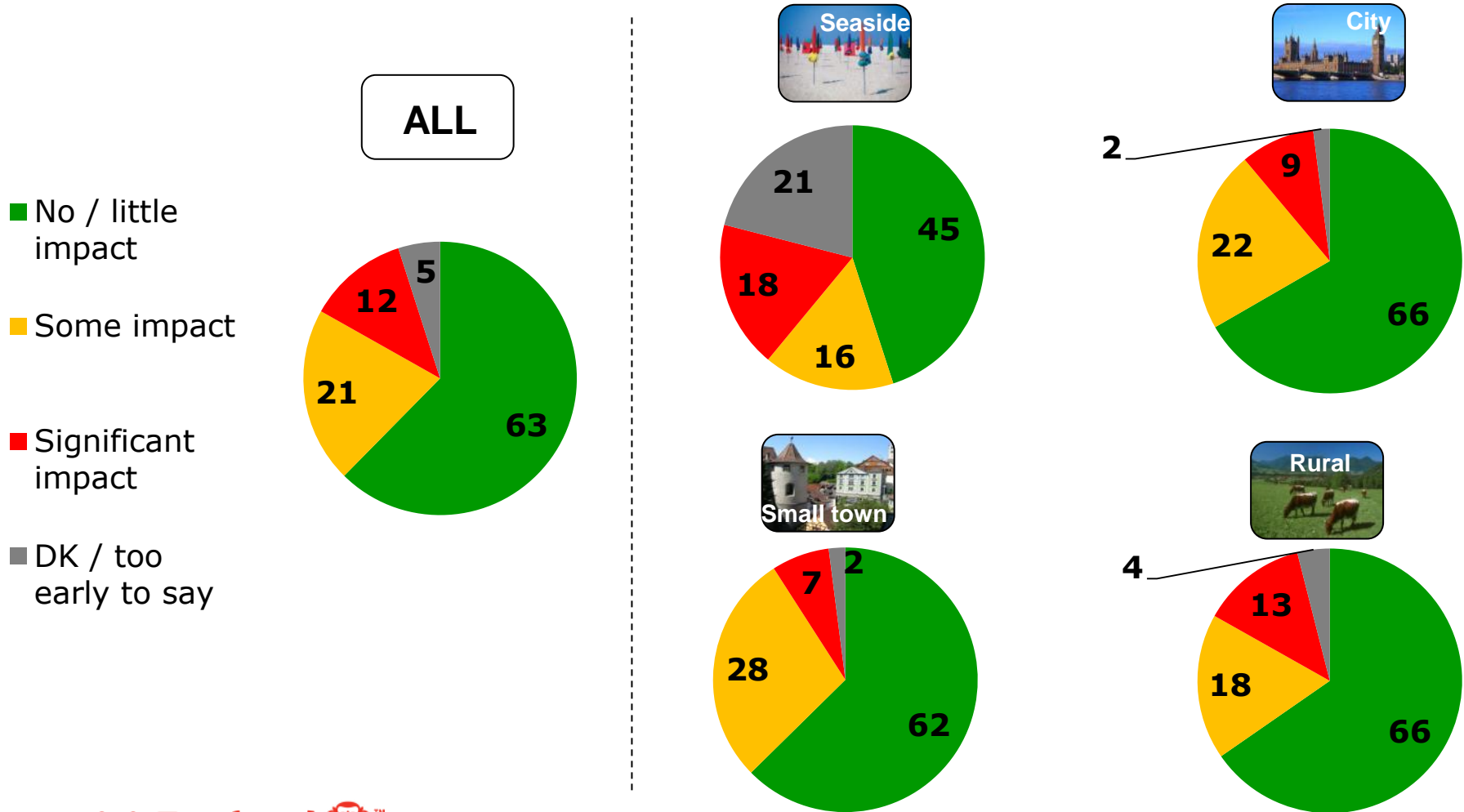
Floods – Impact on visitor numbers YTD 2014

The floods had the most severe impact on the YTD visitor numbers amongst outdoor attractions, with 1 in 5 saying the impact was “significant”.



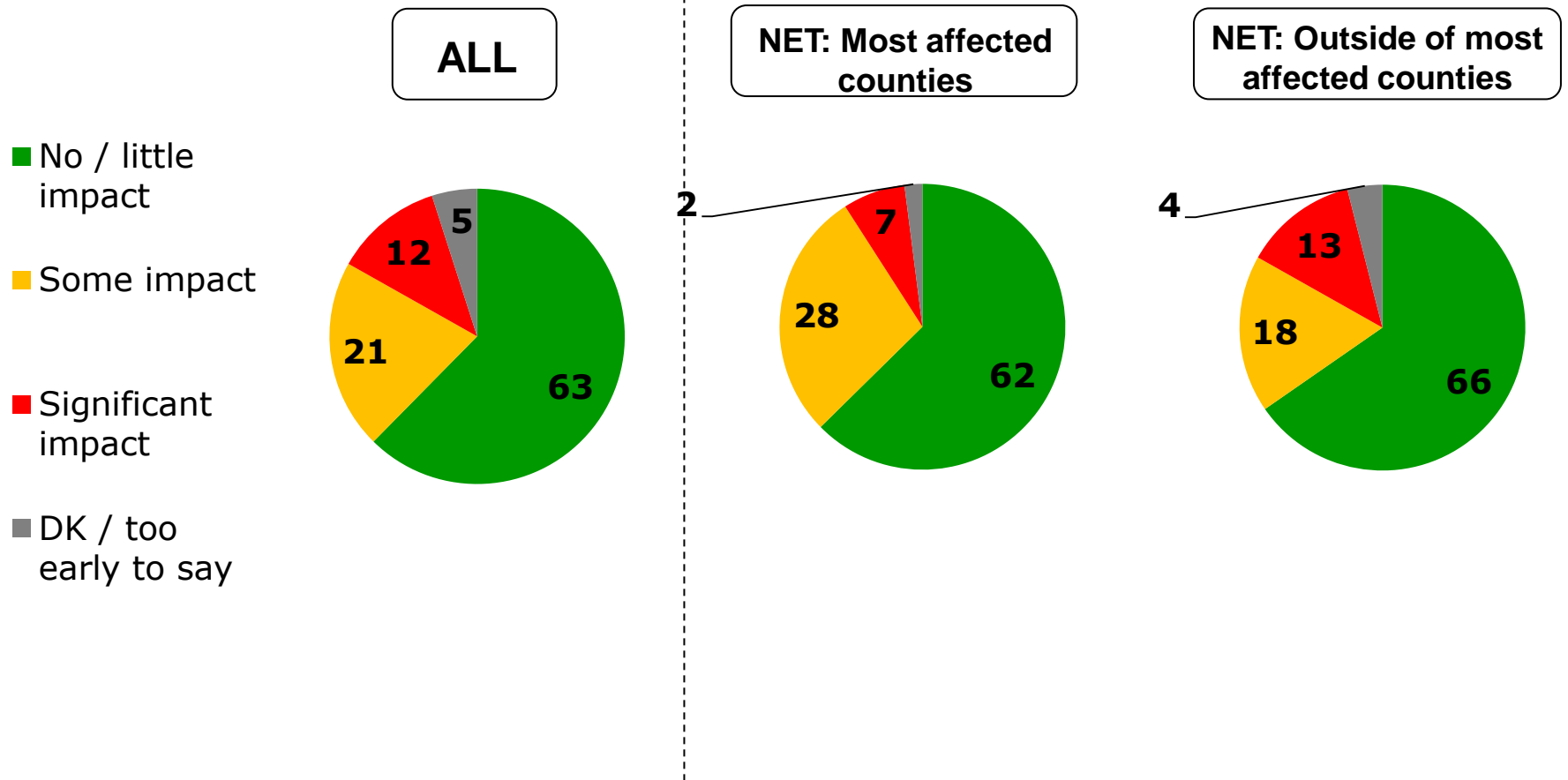
Floods – Impact on visitor numbers YTD 2014

Seaside attractions are reporting the greatest impact of floods on visitor numbers for 2014 so far, with a further 1 in 5 saying they are not sure what the full impact is or that it is too early to say.



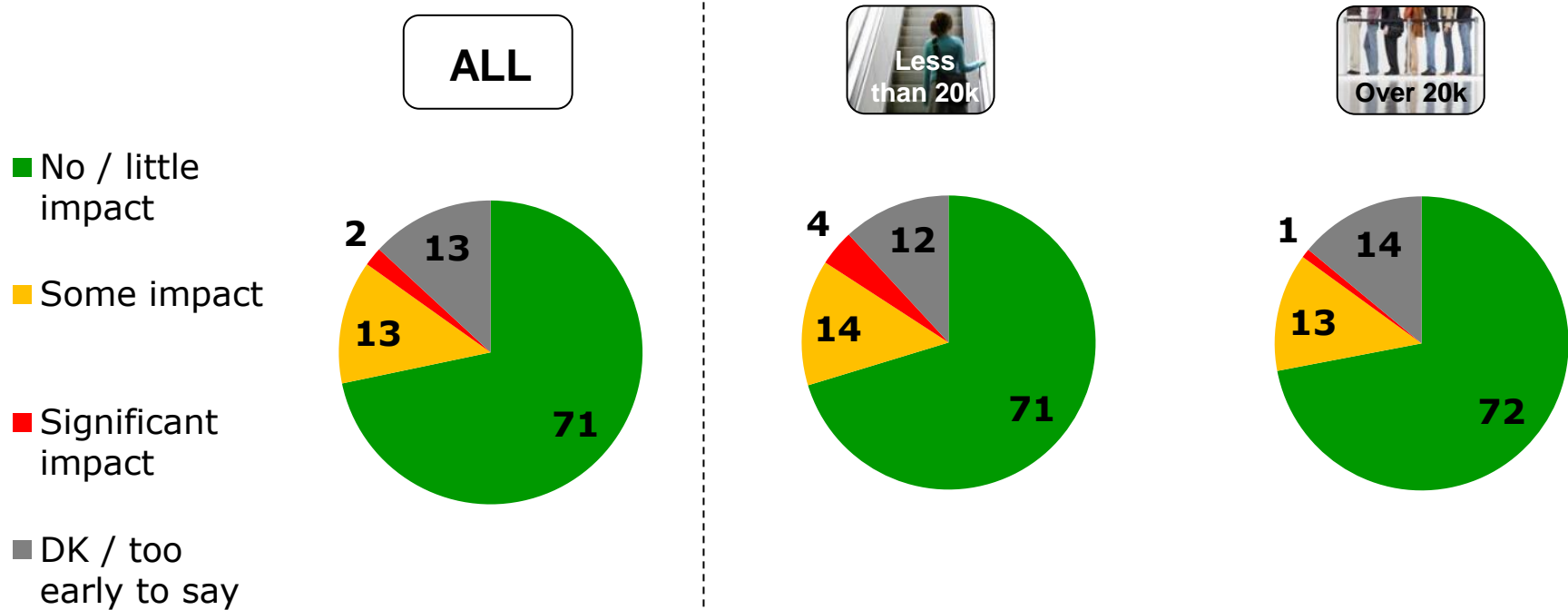
Floods – Impact on visitor numbers YTD 2014

Unsurprisingly the most significant impact from the floods on visitors numbers was amongst attractions in regions where the flooding was most severe.



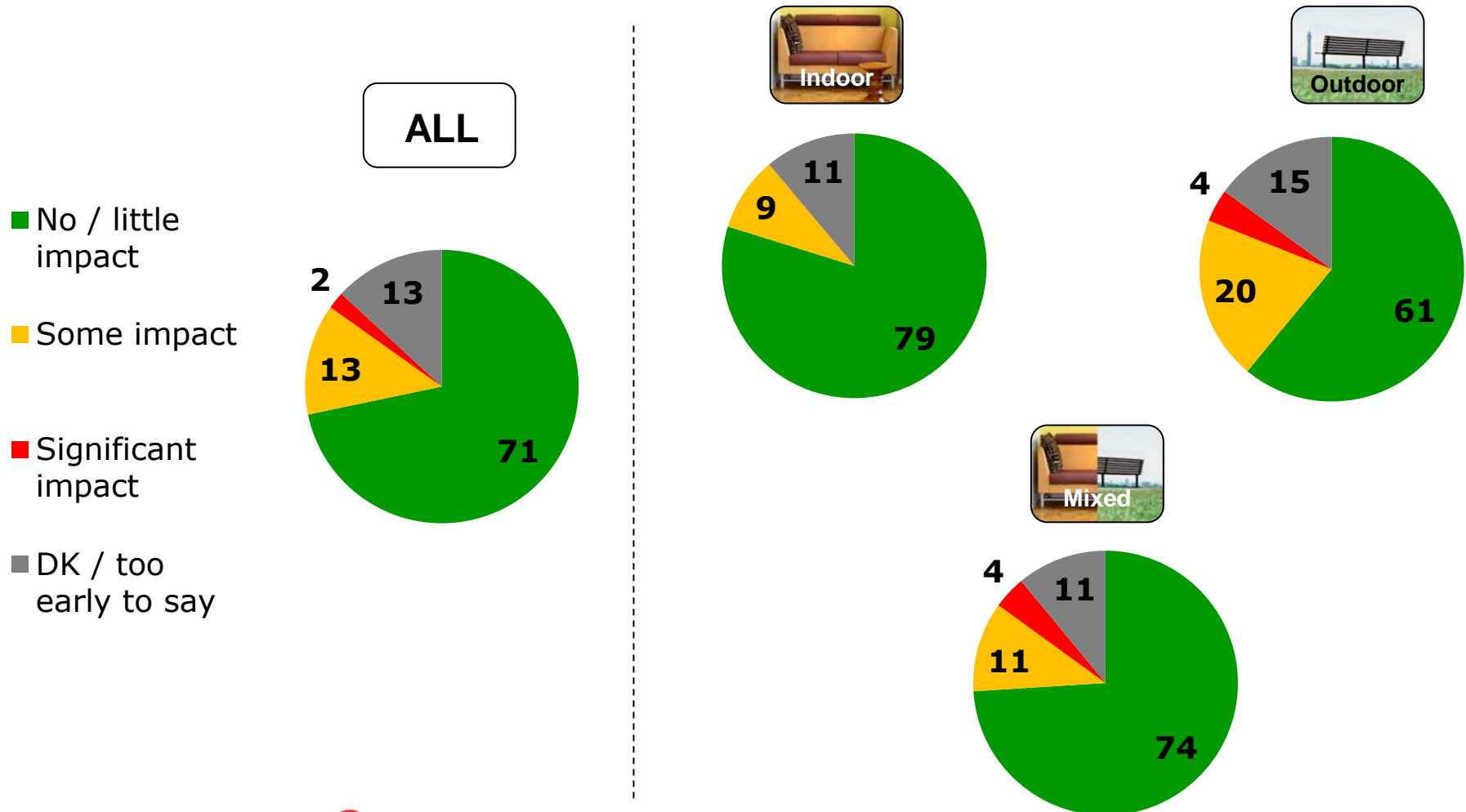
Floods – Impact on business performance for 2014 as a whole

For the majority of attractions (71%), the floods are expected to have no / little impact on business performance for 2014 as a whole – this is similar for both smaller and larger attractions alike



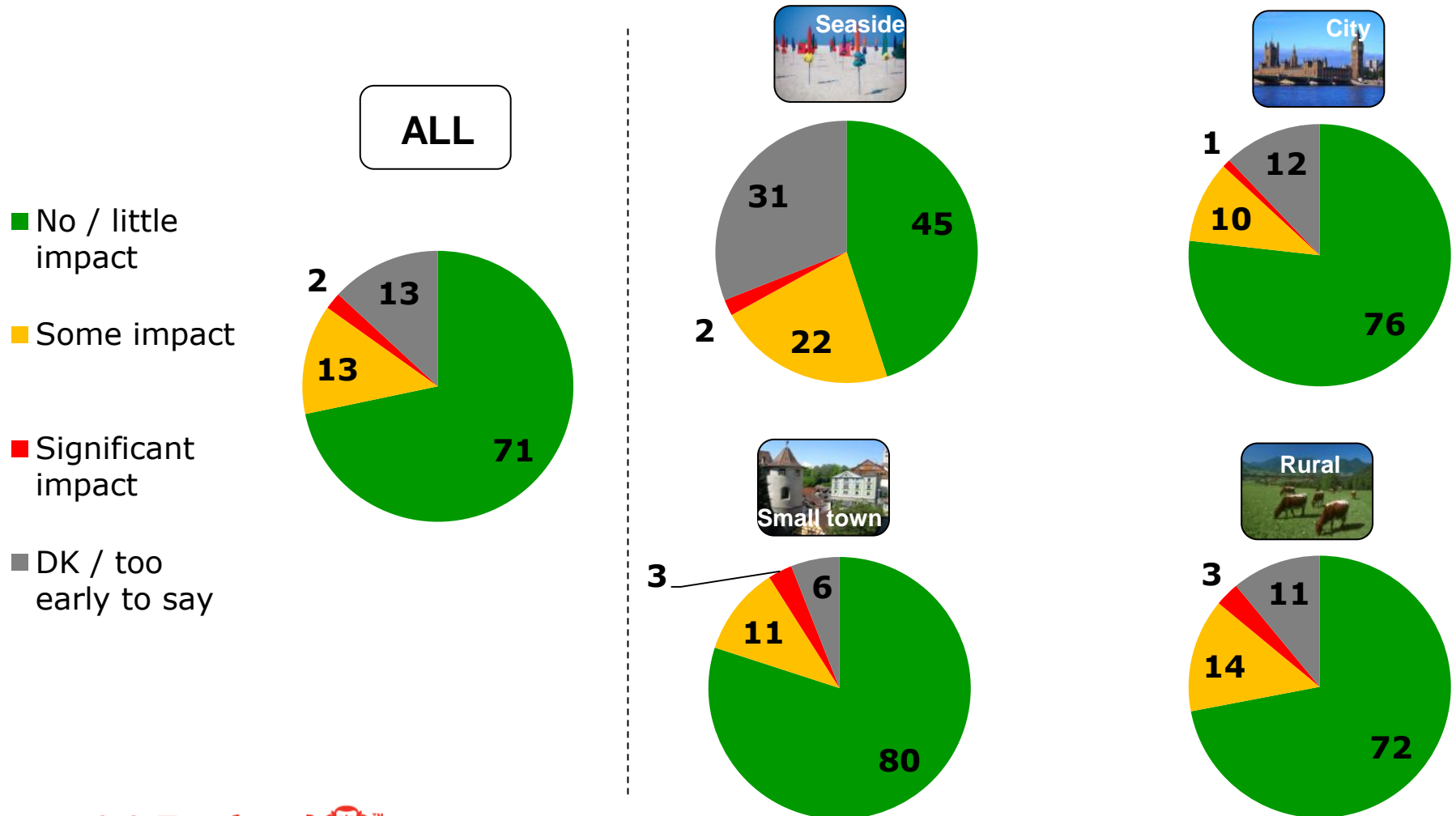
Floods – Impact on business performance for 2014 as a whole

Outdoor and mixed visitor attractions, who were affected the most severely by the floods, are more likely to report that it will have at least some impact on their business performance for the rest of the year as a whole. Almost 4 in 5 indoor attractions feel the floods will have little or no impact on their performance over 2014.



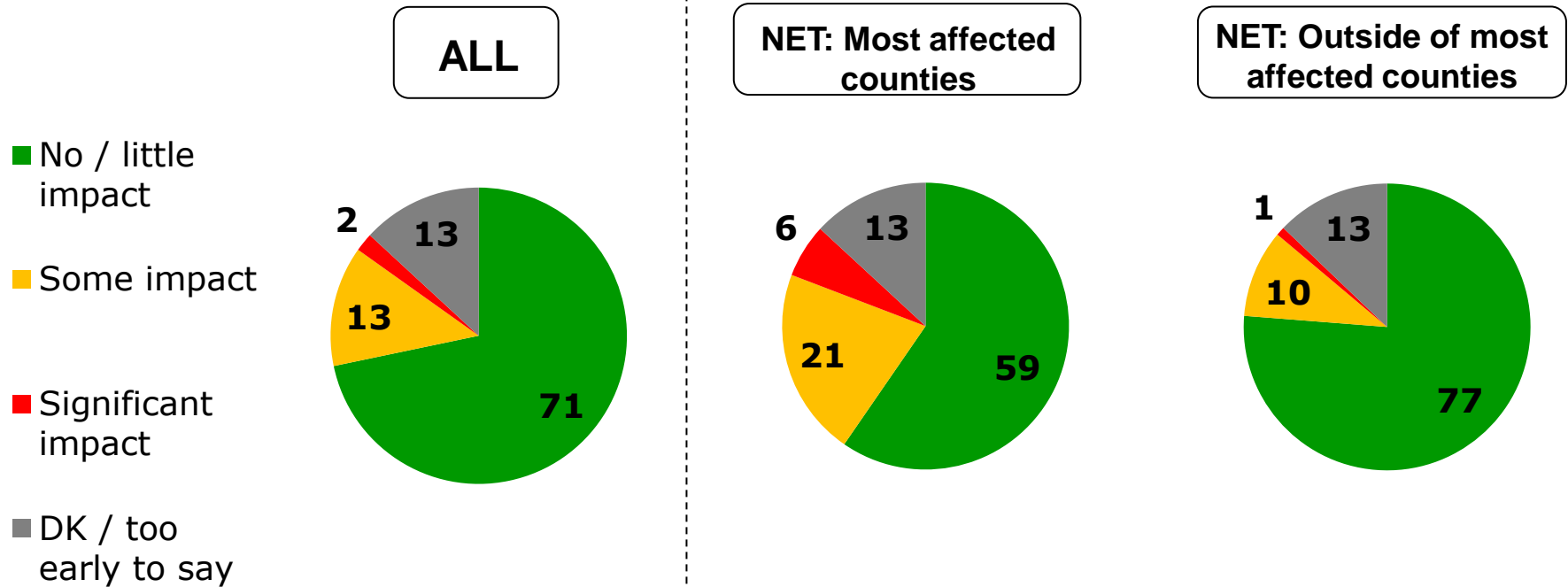
Floods – Impact on business performance for 2014 as a whole

Seaside attractions are most likely to feel the impact of the floods and be uncertain how this will affect 2014 as a whole, suggesting their business is more dependent on ongoing clear up work.



Floods – Impact on business performance for 2014 as a whole

Due to the significant impact of the floods on visitor numbers for the YTD amongst attractions in the most affected counties, far fewer of these attractions feel there will be little or no impact on their business performance for the year as a whole compared with those outside the worst affected areas.

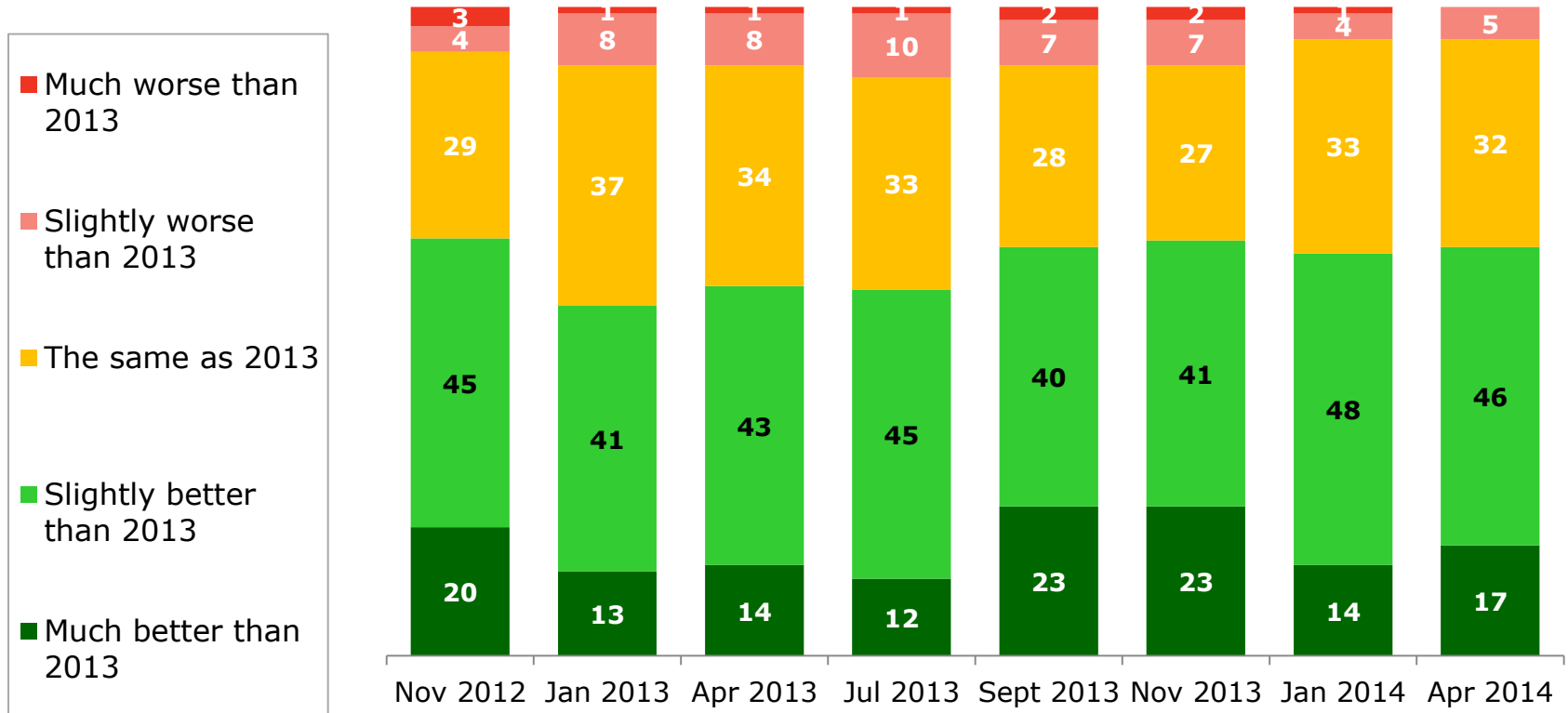


Future Performance



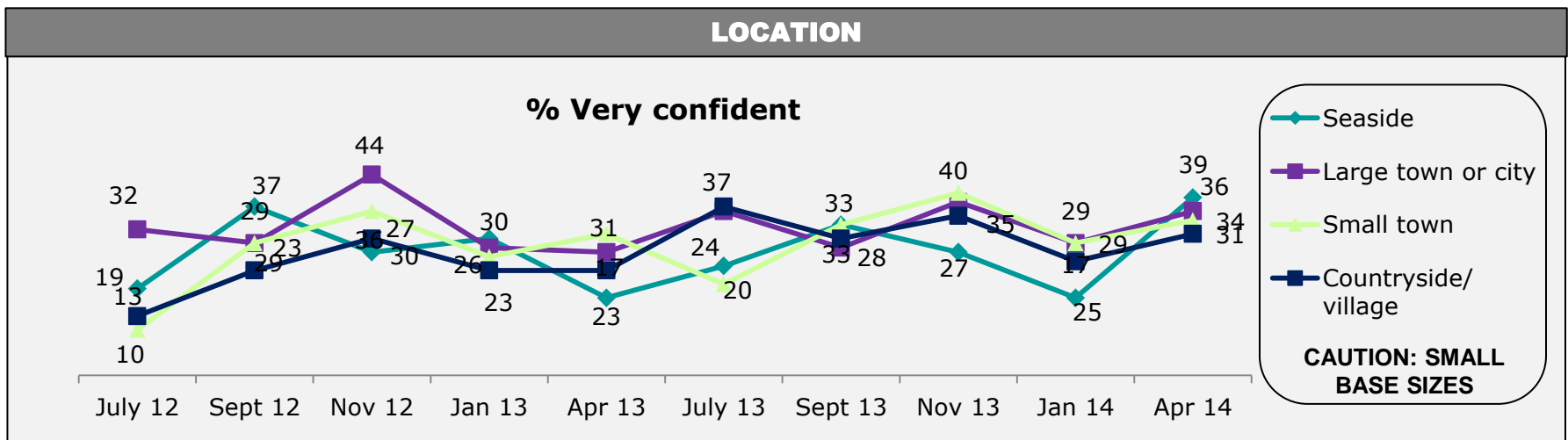
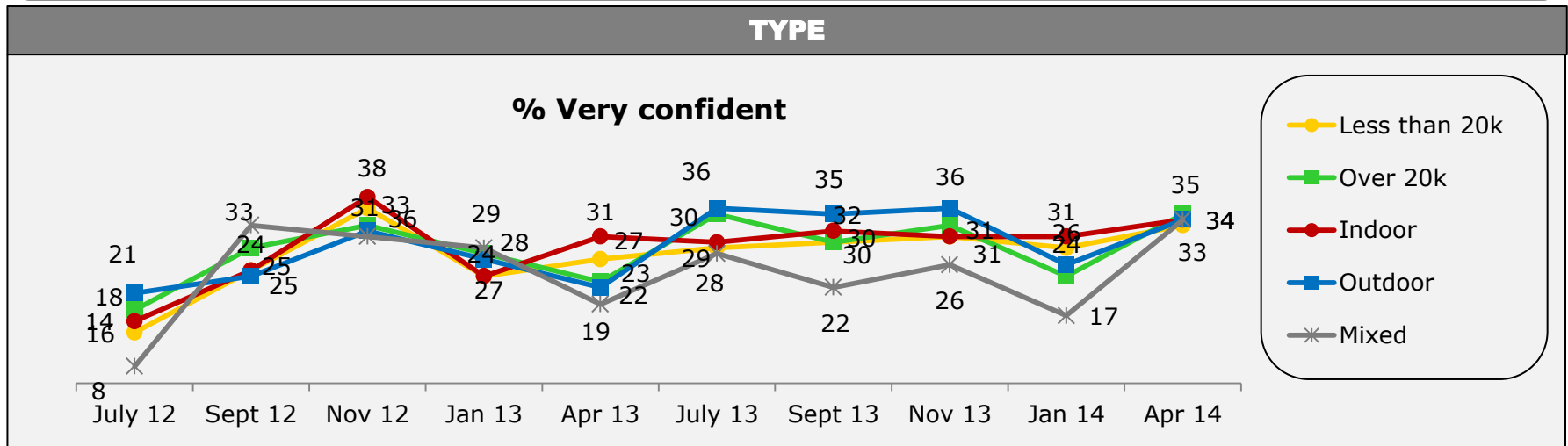
Business optimism for 2014

Business optimism for attractions in 2014 remains on a level with the previous period, although it is slightly higher than at Easter last year.



Confidence for forthcoming period: Attractions

Confidence levels for mixed indoor/outdoor attractions are much improved on 2013 levels. The approach to Spring/Summer and warmer weather seems to have buoyed confidence amongst businesses in all location types also and at levels comparable with Summer 2013.



Positive verbatim comments on business confidence

“

Very confident as we have got more family events planned

Hopefully with the economy improving people will want to go out more and we have some good exhibitions coming up

Very confident as the weather has been good and we have new events coming up. Also ongoing events are increasing in popularity.

We have set up an in house café; this is increasing numbers

Very confident because of the way the year has gone so far and we have lots of events planned

Fairly confident because I think weather will be ok. Also we have increased our events calendar and done more marketing

”

Negative verbatim comments on business confidence

Not totally confident because there has been a slow down since Christmas - I think a lot has been to do with weather events

We are very dependant on the weather and just because we've been up on numbers for the first quarter it doesn't mean that trend will continue

There have been issues with the funding from the local council - we have had to change our opening hours to just a few days a week and we also lost a lot of members of staff as well



Performance and confidence snapshot: April 2014

		Visitor Numbers (April)			Confidence (late Spring / early Summer)	
		Up	Same	Down	Very	Very / fairly
TOTAL (%)		59	23	18	34	97
Visitor numbers per annum (%)	Less than 20k	50	23	27	33	97
	20k or over	67	23	11	35	99
	20k-50k	62	21	17	30	97
	50k-100k	83	17	-	28	100
	Over 100k	63	27	10	43	100
Type (%)	Indoor	52	22	26	34	98
	Outdoor	63	27	10	34	96
	Mixed	64	16	20	34	99
Charge (%)	Paid	63	18	19	34	98
	Free	53	30	18	33	96
VAQAS (%)	Yes	62	25	13	35	98
	No	58	22	20	33	97
Location (%)	Seaside	62	16	22	39	95
	Large town / city	50	36	14	36	97
	Small town	55	18	14	34	98
	Rural	64	21	15	31	98