VisitEngland

Tourism Business Monitor 2014

Visitor Attractions Report

Wave 4 – Mid-July until end of the Summer holidays

bdrc continental

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:

Sept 2014: 8-14 Sept 2014, reviewing the period from mid-July up until the end of the summer holidays
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

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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

A strong performance over summer has resulted in an overall increase in visitors of 5% for the latest period, which has consequently lead to a year-to-date increase in visitors of 3%. Satisfaction levels reflect this positive performance and, buoyed by this, confidence levels for the forthcoming period are higher than this same time last year.

Over half of attractions, regardless of size or type, reported an increase in visitors over the Summer period and for the year-to-date.

This growth comes from all types of visitors, with local, other domestic and international visitors being up across the board. Outdoor attractions have seen particularly strong numbers of local and domestic visitors for the year-to-date.

A sunny earlier summer period followed by a more changeable August has allowed strong growth in visitor numbers for both indoor and outdoor attractions over the summer – up by 5% on last year for both. Larger attractions with over 20,000 visitors have seen even bigger changes, with 7% more visitors than in summer 2013.

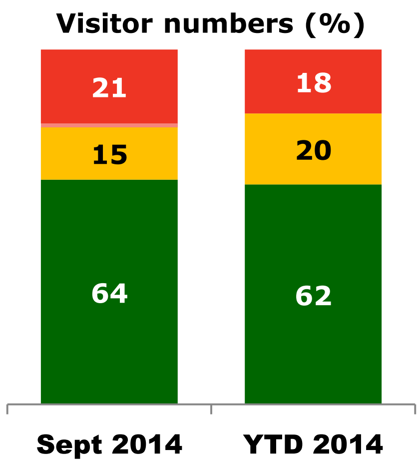
Satisfaction levels are typically high post summer, but several types of attractions (free, indoor and seaside attractions and non-VAQAS members) have reported the highest levels of satisfaction with business performance since before Jan ’13.

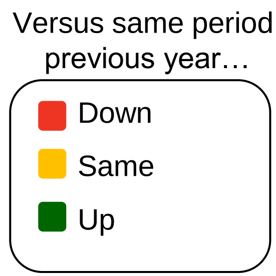
Strong business performance over the summer period is reflected in confidence levels for the forthcoming period, which are at their highest levels since before Nov ‘12. Two thirds of attractions (the highest proportion since pre-Jan ’13) now expect 2014 to be better a better year than 2013.

Business Dashboards

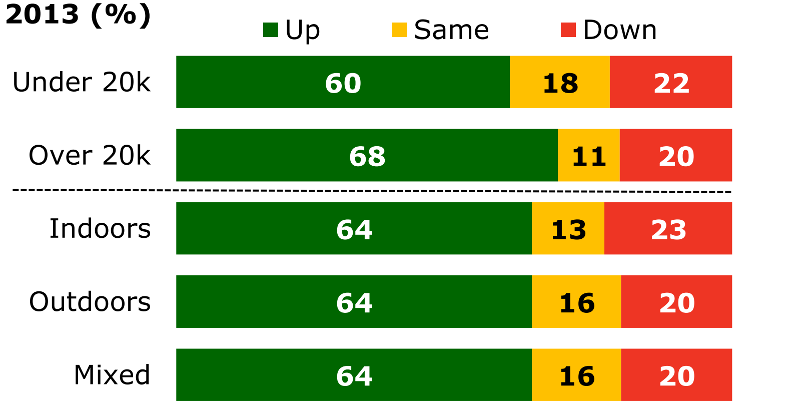
Business Performance Dashboard: Attractions

VISITOR NUMBERS

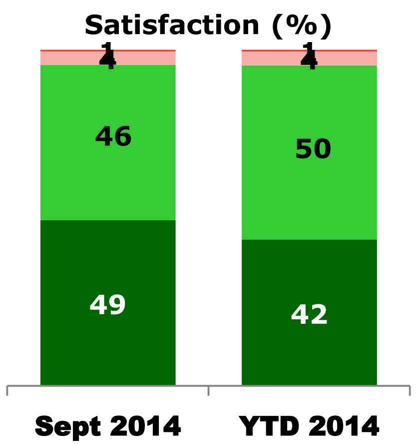




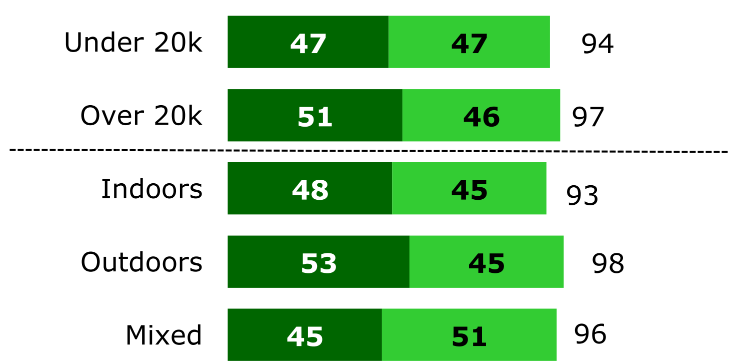
Visitor numbers for period from mid-July until the end of the summer hols 2014 compared with same period 2013 (%)



SATISFACTION



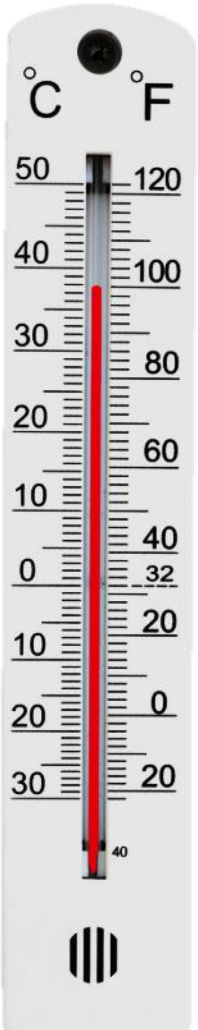
Satisfaction with Performance from mid-July until the end of the summer hols 2014 (%)

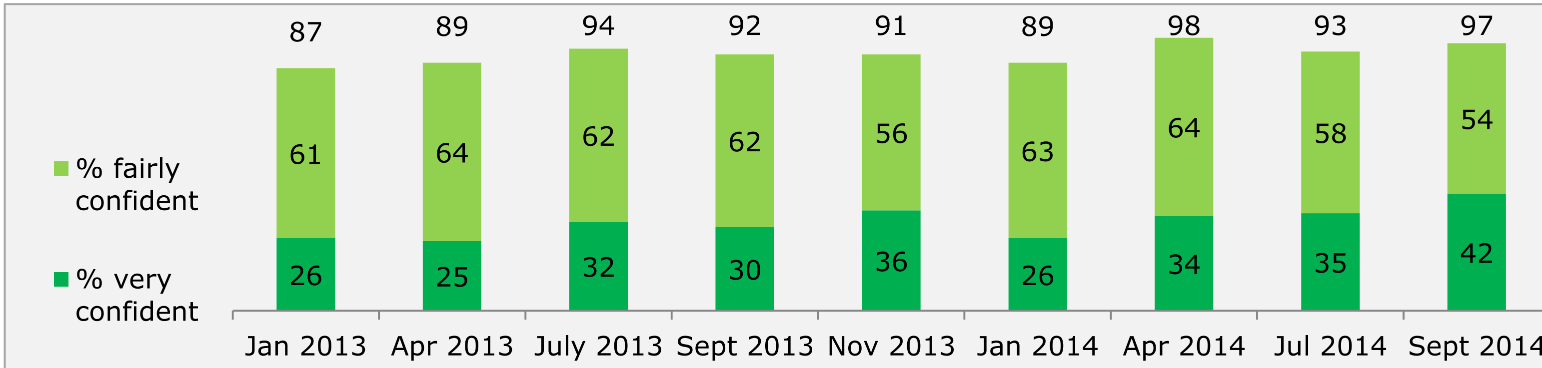


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July until end of Summer holidays

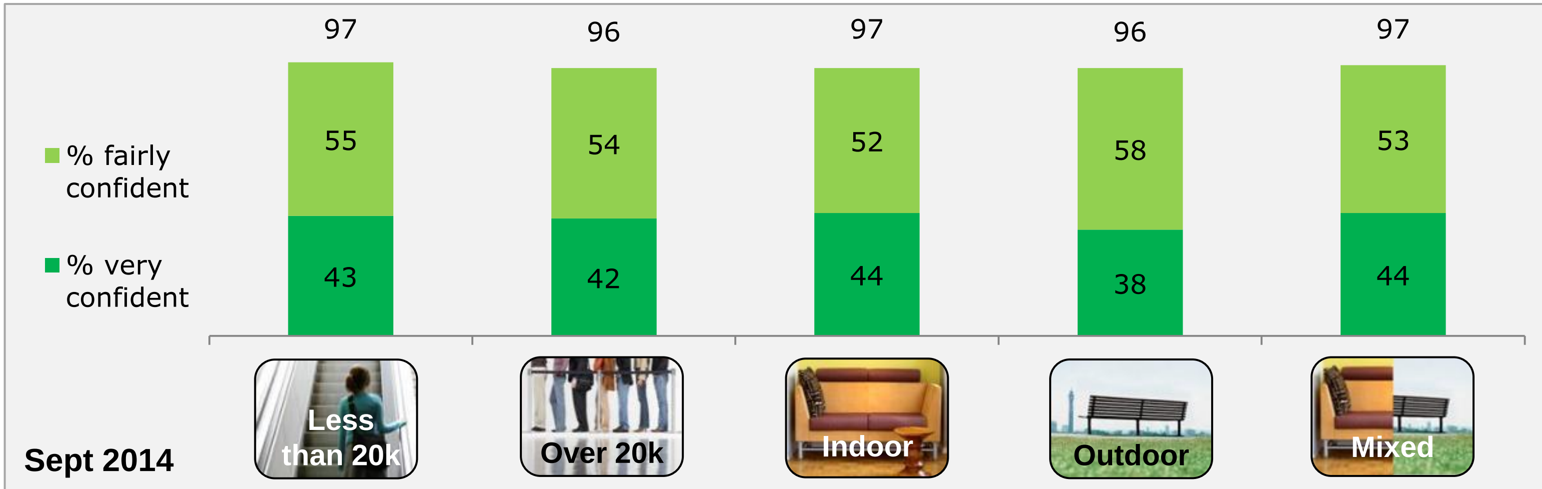
Q3/4 & Q6, Q7/8, Q10

Business Confidence Dashboard: Attractions





Period asked about:	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	Until end October



PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
Sept 2014: Up until end of October

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Q14

Visitor Profile

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

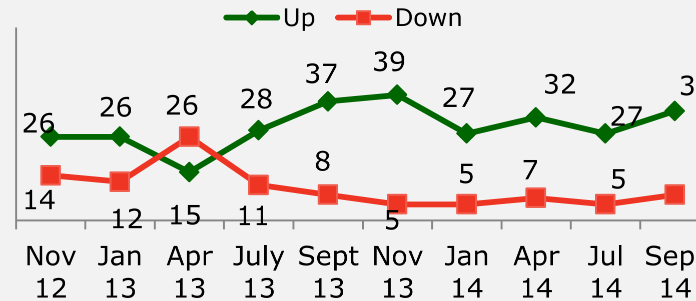
Up | Same | Down

NET: Up - Down

Visitors from immediate locality

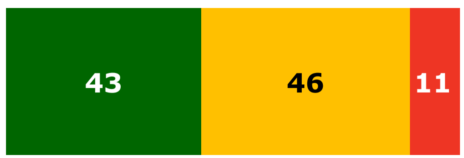
Sept 14

+26

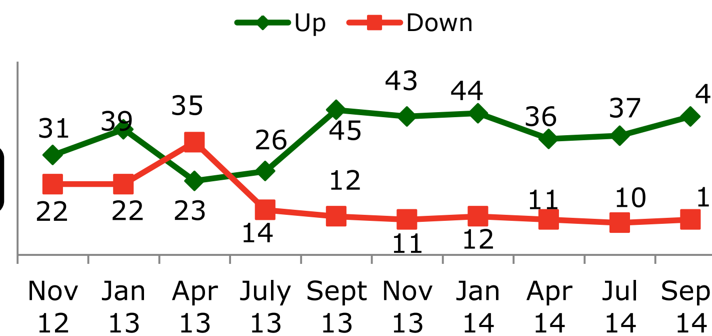


Other domestic visitors

Sept 14

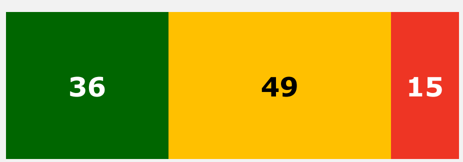


+32

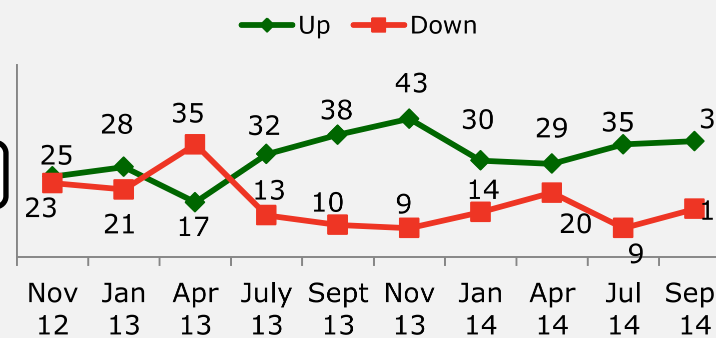


Overseas visitors

Sept 14



+21



Q13

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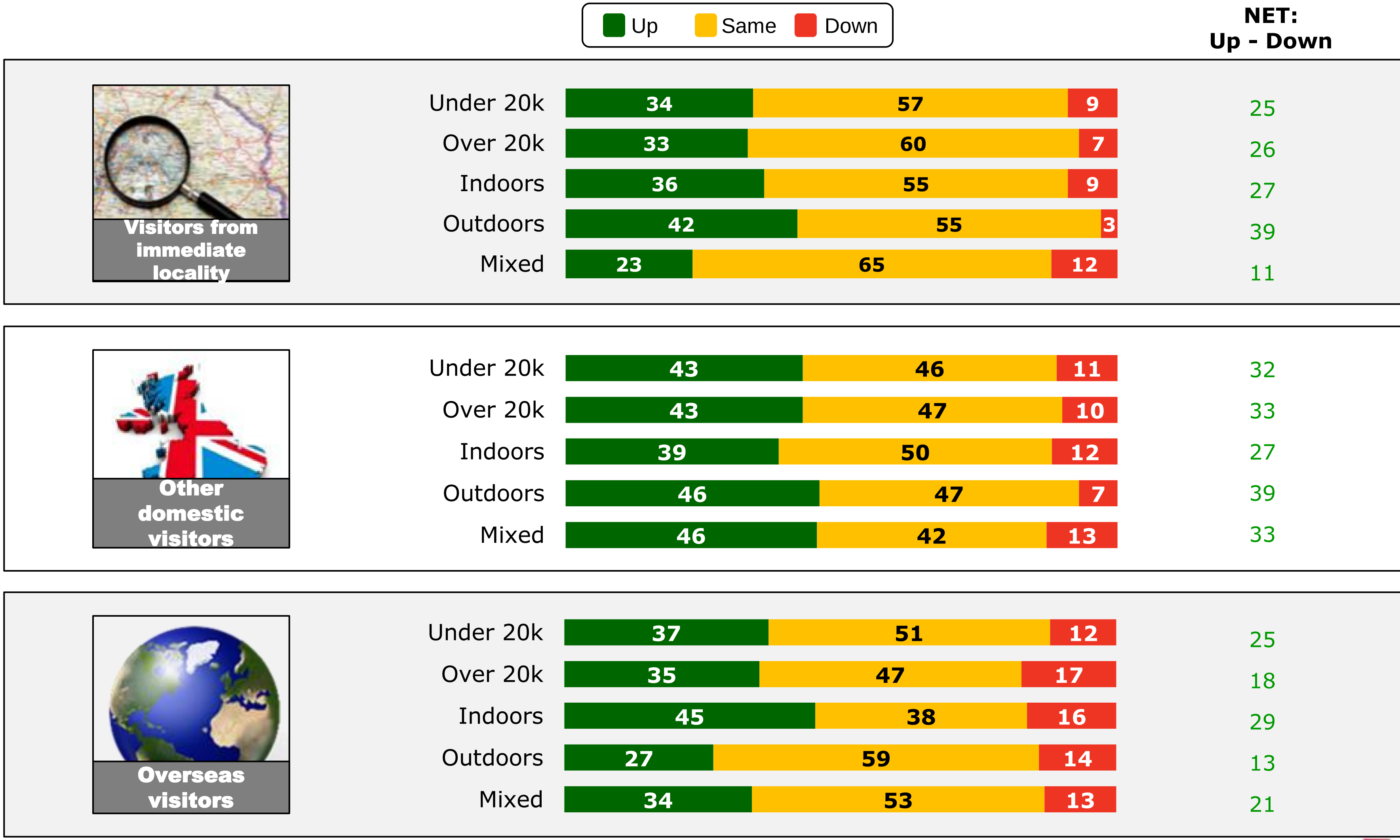
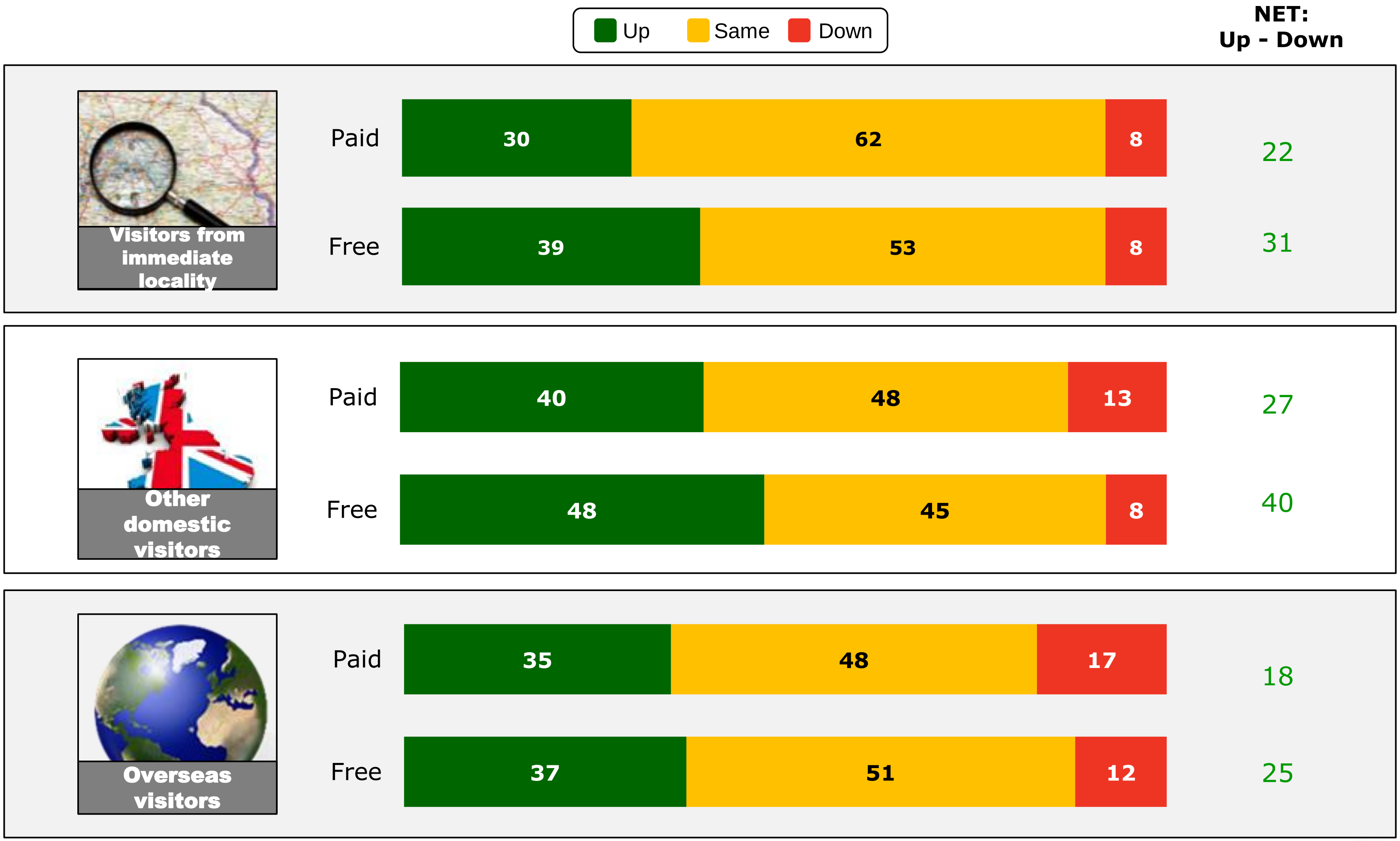
Changing Visitor Profile (year-to-date vs. previous year): Attraction type

Visitor numbers are up across all visitor profiles, for all attraction types. Outdoor attractions have seen particularly strong numbers of local and domestic visitors for the year-to-date.



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

Free attractions have fared slightly better than paid for ones for this year-to-date period compared with last year.

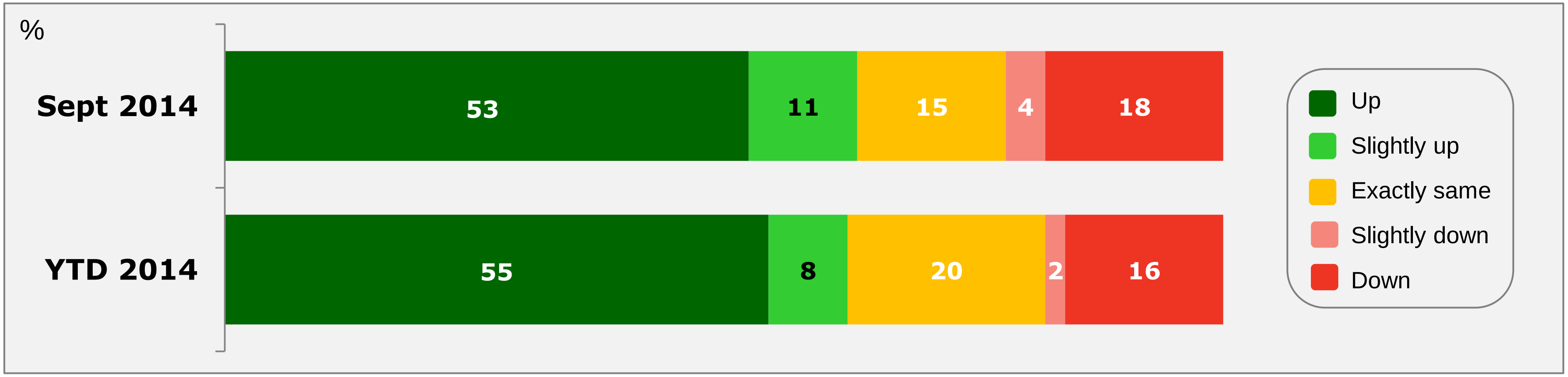


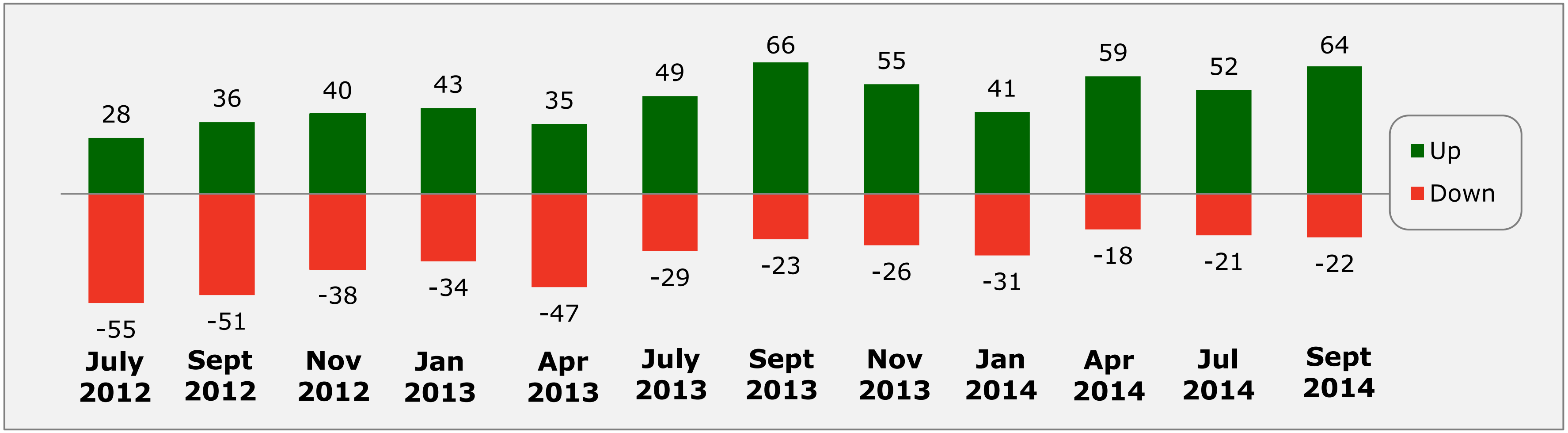
Q13

Past Performance

Visitor numbers: Year-on-year changes

Proportions of visitor attractions saying visitor numbers are up for this latest period are on a level with this time last year. As a result of the overall strong increase in visitors this period, the year-to-date figures are also up.

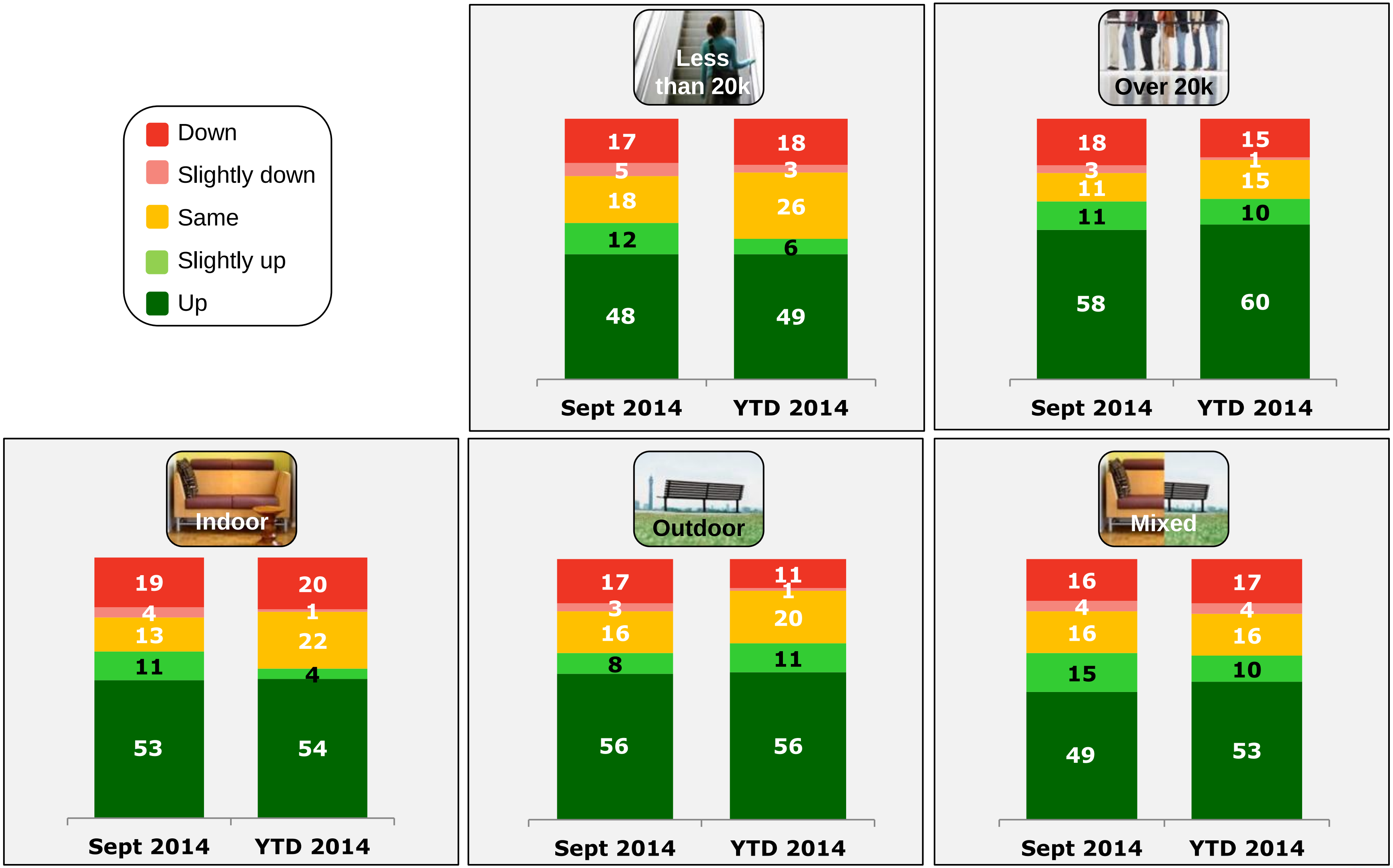




PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July until end of Summer holidays/ **Jul 2014:** After Easter holidays until mid-July/ **Apr 2014:** the Easter period 2014 **/ Jan 2014:** Christmas and New Year period 2013/ **Nov 2013:** Mid-September until the end of October/

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

Over half of attractions, regardless of size or type, said that visitor numbers are up - both for the most recent Summer period and for the year-to-date.

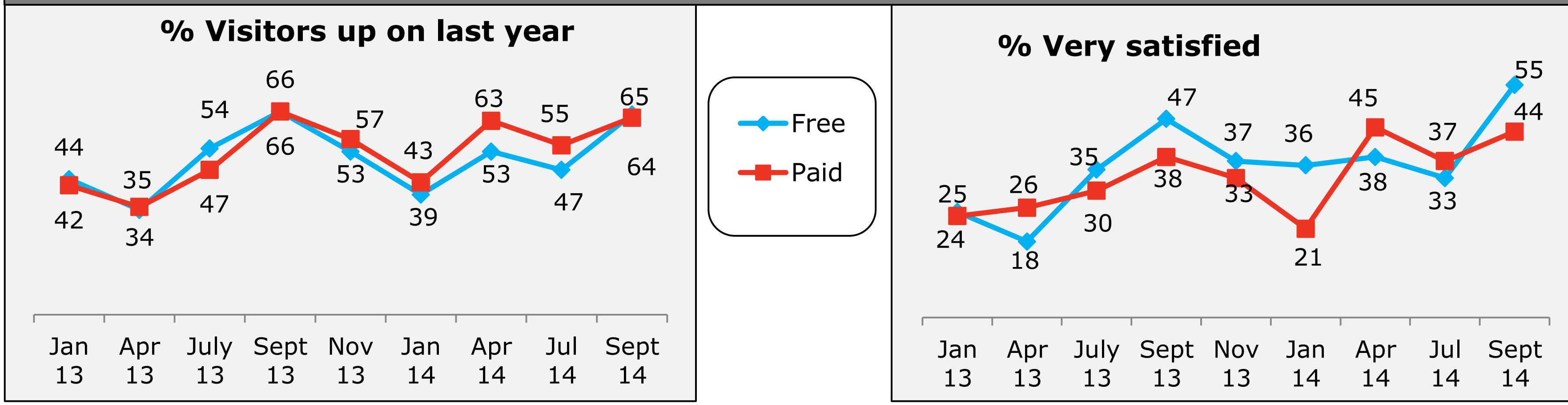


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July until end of Summer holidays

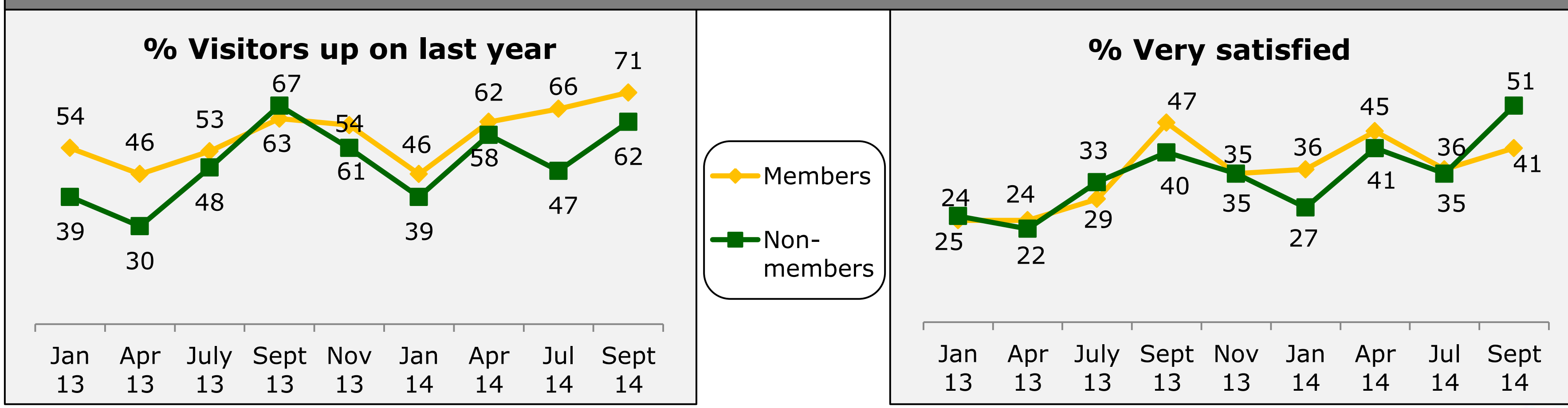
Changing business performance: By admission charge and VAQAS

There has been a strengthening of performance, compared with the previous year, regardless of charging and VAQAS membership. Free attractions and non-VAQAS members have reported the highest levels of satisfaction with business performance since before Jan ’13.

ADMISSION

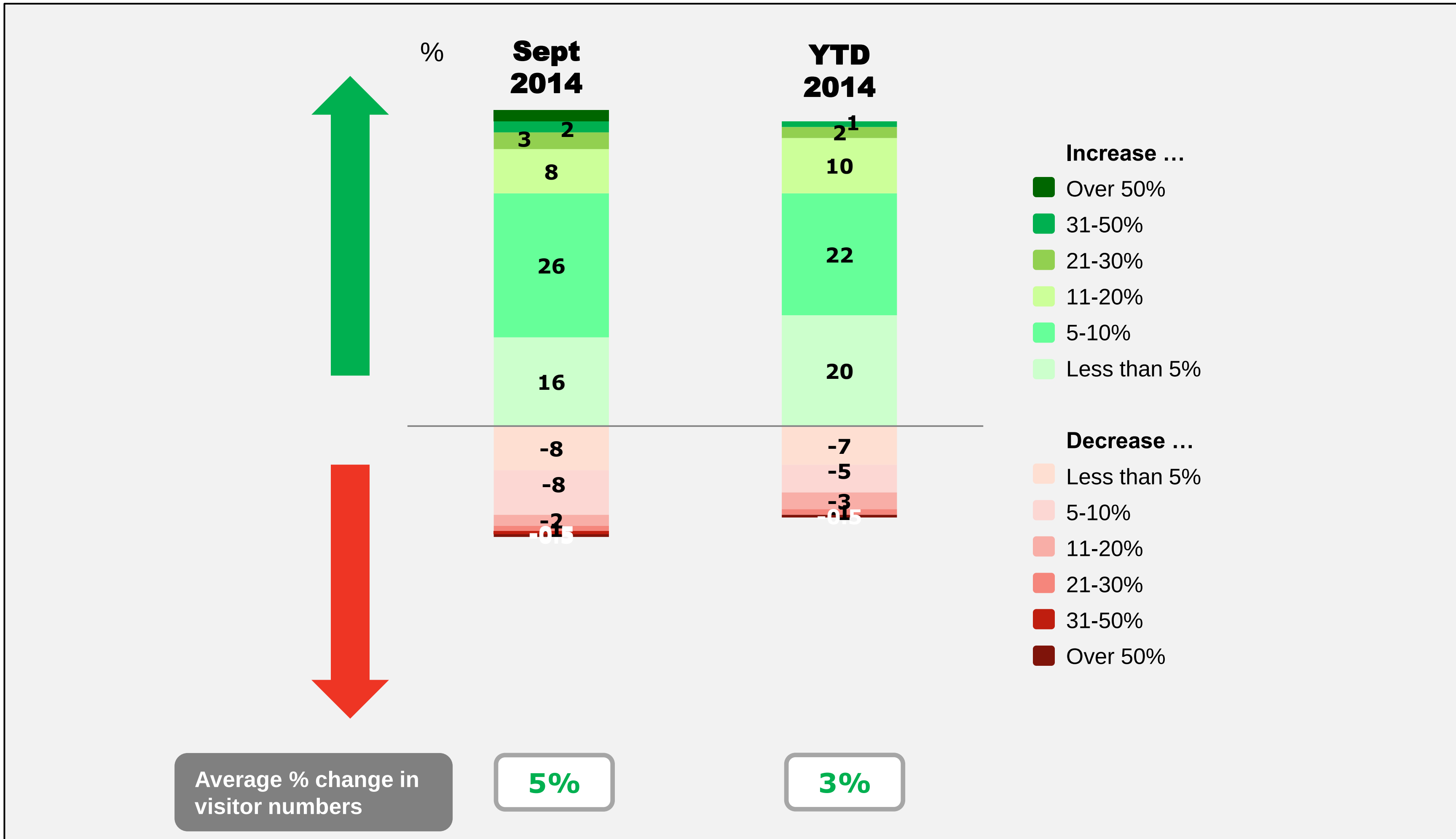


VAQAS



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

A successful Summer period has resulted in an overall increase in visitors of 5%, compared with last year. Consequently, there has also been a 3% increase in visitors for the year-to-date period this year.



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PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July until end of Summer holidays

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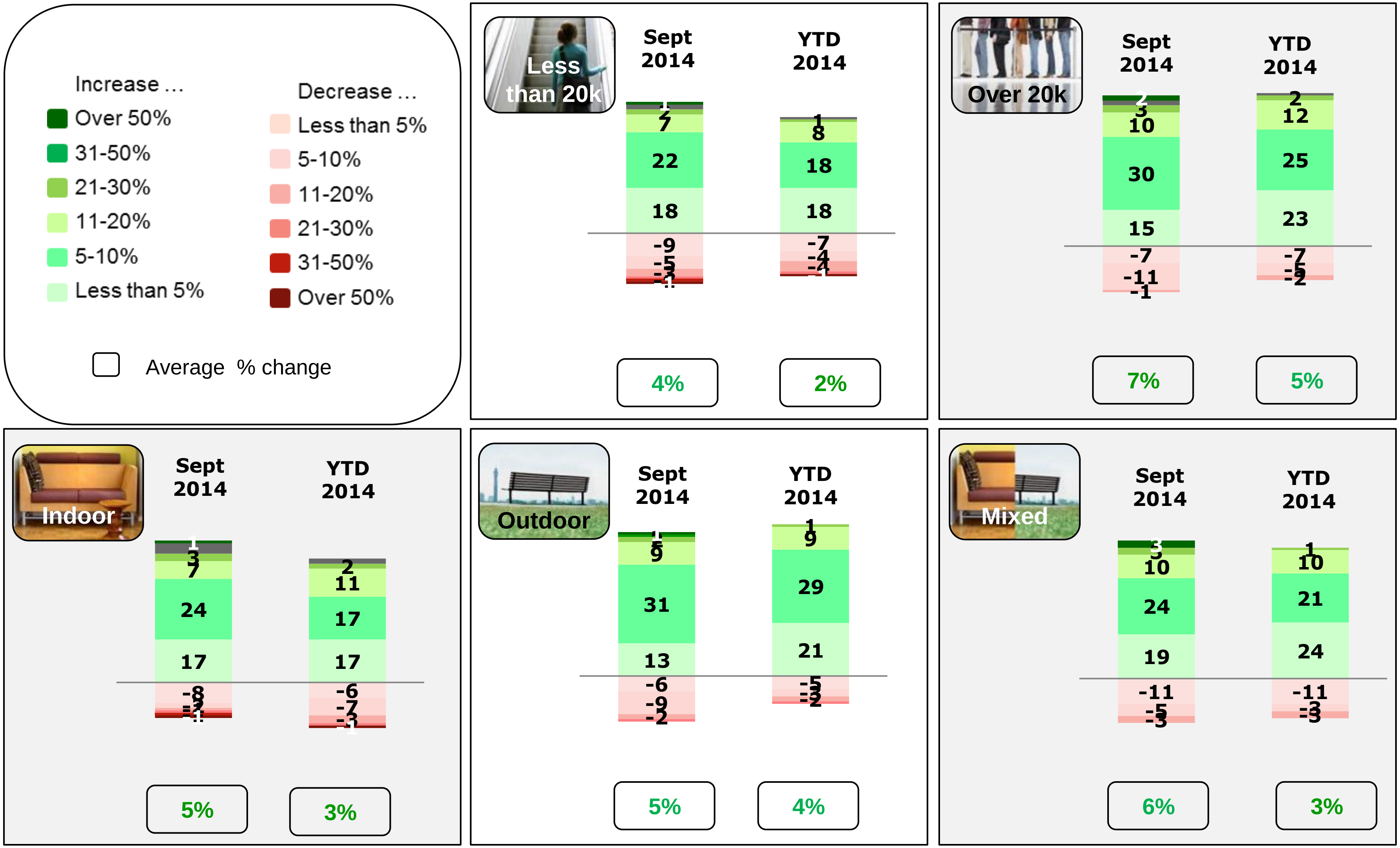
Q5, Q9

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

A sunny earlier summer period followed by a more changeable August has allowed both indoor and outdoor attractions to grow visitor numbers for this latest period. Smaller attractions have seen smaller changes in audience numbers, but they are still up over the summer and for the year to date.



VisitEngland

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July until end of Summer holidays

bdrc continental

Q5, Q9

Positive verbatim comments on business performance

We have made improvements within the business which generated more visitors and led to a large increase in repeat visitors.

Because we are becoming more well known and public awareness has increased and because of new exhibitions

We have changed things that we do, we have kept things fresh and different.

Mostly we renovated our building and extended opening hours and it's helped with business.

Our income from admissions is better because we have so many foreign visitors coming in.

We were highly commended - we won the tourist attraction of the year award for Dorset - so we have used that in our advertising, and the weather has helped in August.

Negative verbatim comments on business performance

“

We are already down on 2013 and don't expect it to pick up, but the period after November is critical.

July was very hot so people were going to the seaside and in August there were lots of wet or mixed days. I believe that people are risking holidays abroad and so we’re losing business.

Our numbers are down from last year as we’ve suffered various issues related to building works.

Mostly the general state of the economy - people still don't feel well off.

”

Case Study: The Gardens Gallery

Increase in visitor numbers by 5-10% for latest period compared with the same period in 2013.

The Gardens Gallery is becoming increasingly well known, particularly in the local community, in part due to the ***constantly changing exhibitions*** *we put on. Every week we have new exhibitors showing in the gallery, who each have their own list of contacts and followers that they reach out to. Furthermore, the local paper is very supportive of the gallery and publishes regular pieces on our new exhibitions. This all helps to* ***promote the gallery among the public****, and bring both new and repeat visitors.*

Our website is a key factor in bringing in business too, in particular the ***downloadable exhibitions diary*** *which visitors can use to plan their visits. We also include information on all arts activities in and around Gloucestershire.*

Over the last 12 months we have also worked on ***promoting the message of sustainability****, and the gallery is lowering it's carbon emissions and working in line with Cheltenham as a whole to become greener. This has also led to greater visibility of the gallery amongst the local community, and further afield.*

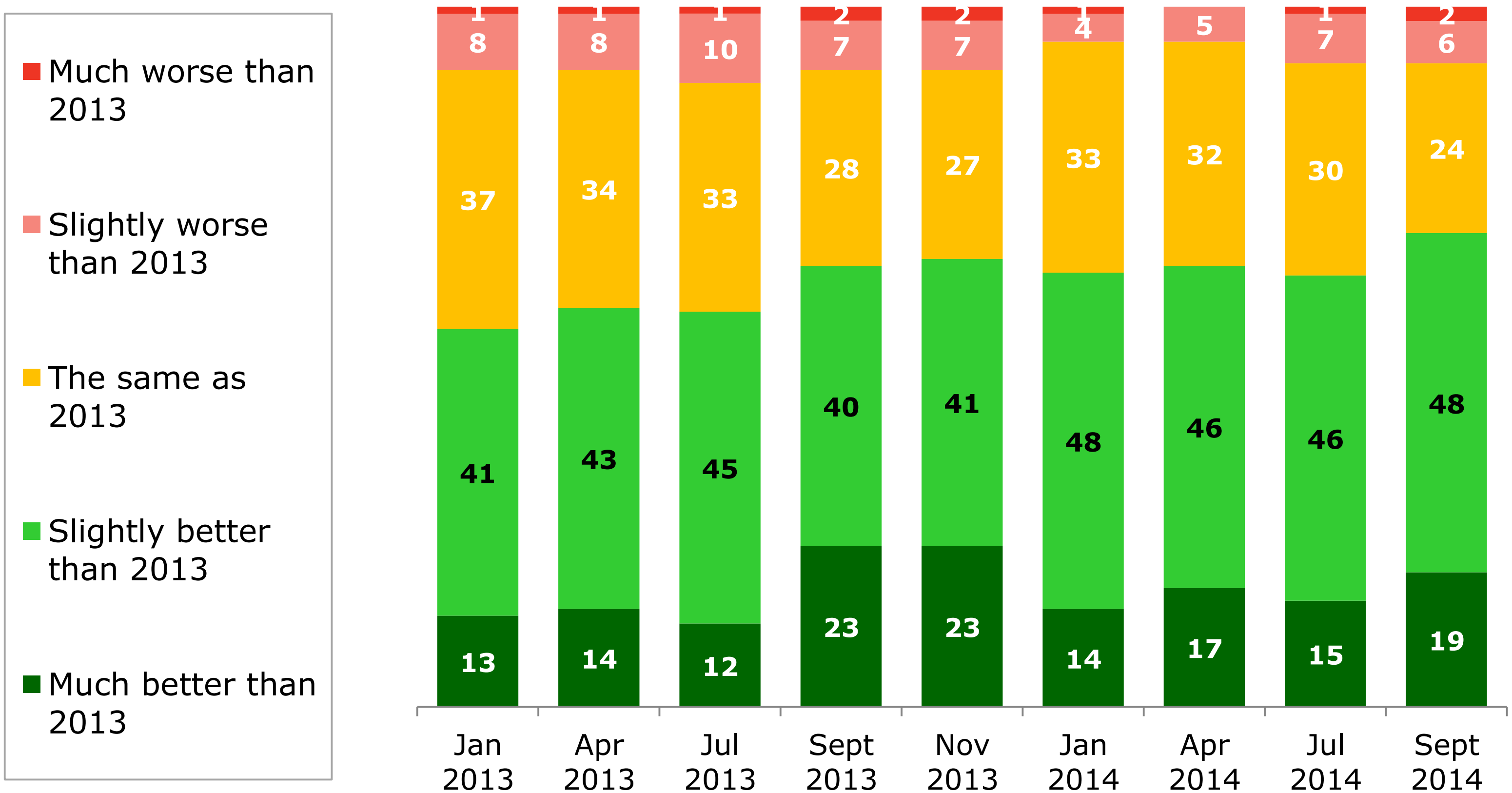
This gallery keeps its offering fresh, to encourage repeat business and build public awareness

- **Independent art gallery in Cheltenham**
- **Free entry**

Future Performance

Business optimism for 2014

The success of this latest period seems to have buoyed business optimism for the year as a whole, with the highest proportion since pre-Jan '13 (67%) saying that 2014 will be better than 2013.



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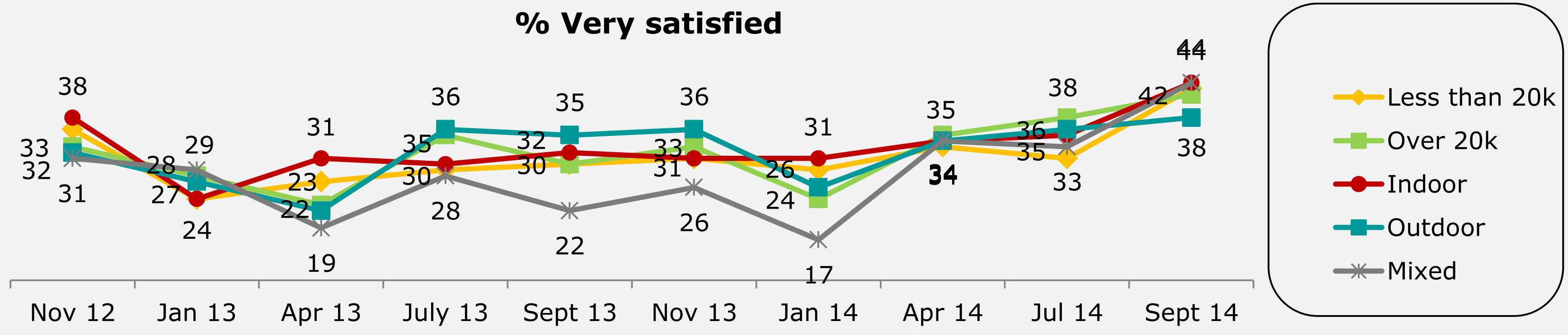
Q15

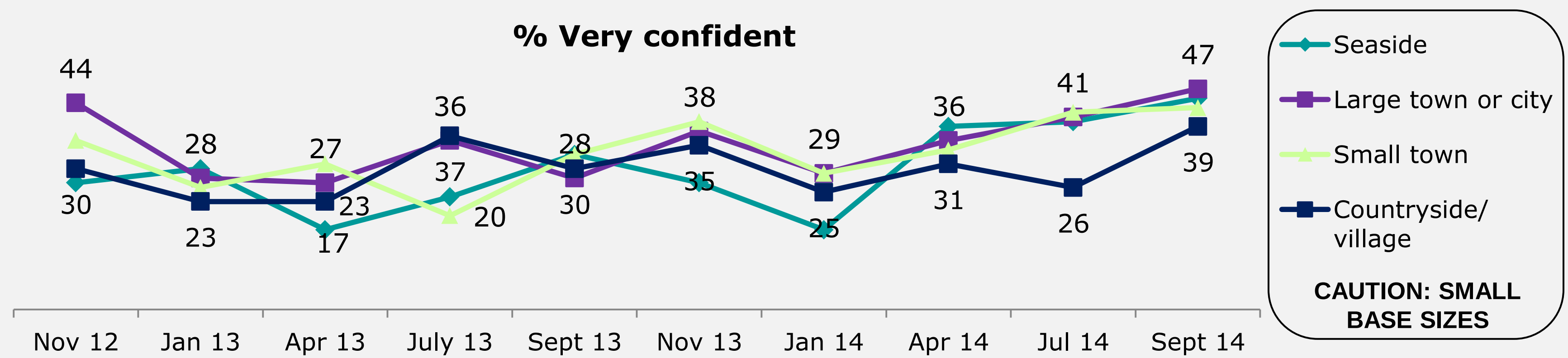
Confidence for forthcoming period: Attractions

Strong business performance over the summer period is reflected in confidence levels for the forthcoming period, which are at their highest levels since before Nov '12.

TYPE



LOCATION



PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
Sept 2014: Up until end of October

Q13

Positive verbatim comments on business confidence

“

Very optimistic - we've got a lot of school visits planned because they are doing projects on world war one and we have new exhibitions focused on that.

We have lots of activities and events planned and we are reviewing these activities; we have strong support from the council as well.

People are willing to spend more money on leisure activities and are not guarding their purse strings so much.

We're expanding the number of events we offer to a larger audience.

We are heading in the busiest final quarter and very optimistic about it.

”

Negative verbatim comments on business confidence

We have a special exhibition gallery which will be refurbished, so there might be a negative impact while that's going on.

There doesn't seem to be many people around and with all the other places open to the public in the local area, there are too many choices for visitors.

We're not feeling very confident because the last few months have been horrendous due to the world cup, the weather and economy and I don't think we can make up the loss this year.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Performance and confidence snapshot: September 2014

		Visitor Numbers (September)			Confidence (End of October)	
		Up	Same	Down	Very	Very / fairly
	TOTAL (%)	64	15	21	42	97
Visitor numbers per annum (%)	Less than 20k	60	18	22	43	97
	20k or over	68	11	20	42	96
	20k-50k	67	9	24	*42*	*97*
	50k-100k	70	12	18	*56*	*93*
	Over 100k	69	12	18	*33*	*98*
Type (%)	Indoor	64	13	23	44	97
	Outdoor	64	16	20	38	96
	Mixed	64	16	20	44	97
Charge (%)	Paid	64	14	22	35	96
	Free	65	15	20	53	98
VAQAS (%)	Yes	71	7	22	44	97
	No	62	17	21	42	96
Location (%)	Seaside	63	14	23	45	100
	Large town / city	64	19	17	47	99
	Small town	65	11	24	43	95
	Rural	64	14	22	39	95