Visitor Attraction Trends in England 2017
Full Report

August 2018

Contents

Acknowledgements

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August 2018

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 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 & Response (1)

VisitEngland tightened its definition and undertook a major review of attractions used for the 2017 survey.

For example, organisations that are primarily a retail outlet, but which have an attraction element (unless separate figures could be provided for the attraction element alone) were removed from the attractions list.

This follows on from the changes implemented for the 2013 survey, when parish churches and small art galleries with a retail focus were removed.

Further, whilst country parks continue to be included in the survey findings, they have generally been excluded from the most visited lists on the basis that it is not possible to exclude those who have visited the park in such a way that falls outside our visitor attraction definition.

VisitEngland no longer rigorously monitors attractions openings and closures. The England attractions database was therefore updated in 2015 using Experian business data. This data was de-duplicated against the existing attractions database.

5,497 English visitor attractions were invited to take part in this year's survey.

1,541 English visitor attractions responded to the survey in 2018, 1,488 of whom provided 2017 visitor numbers:

- 964 completed online

- 223 completed by post

- 354 provided data through umbrella organisations

1,416 attractions provided admissions for both 2017 and 2016 and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response (2)

Response by attraction category

Category	No. attractions providing data for 2016 & 2017	Profile of attractions providing data	
		2016	2017
Country Parks	75	5%	6%
Farms	32	2%	3%
Gardens	85	5%	6%
Historic Properties	443	33%	31%
Leisure / Theme Parks	30	2%	2%
Museums / Art Galleries	459	31%	32%
Steam / Heritage Railways	36	3%	2%
Visitor / Heritage Centres	74	6%	5%
Wildlife Attractions / Zoos	65	5%	5%
Workplaces	15	1%	1%
Places of Worship	58	4%	4%
Other	44	2%	3%
Total	**1,416**		

Sample & Response (3)

Response by region

Category	No. attns. giving 2016 & 2017 data	Profile of attractions providing data	
		2016	**2017**
North West	146	*11%*	*10%*
North East	69	*6%*	*5%*
Yorks/Humber	155	*10%*	*11%*
East Midlands	131	*10%*	*9%*
West Midlands	130	*9%*	*9%*
East	170	*11%*	*12%*
London	96	*7%*	*6%*
South East	278	*19%*	*19%*
South West	241	*17%*	*18%*
Total	**1,416**		

Response by attraction size and admission type

Category	No. attns. giving 2016 & 2017 data	Profile of attractions providing data	
		2016	**2017**
Annual Visits			
10,000 or less	415	*31%*	*29%*
10,001 – 20,000	169	*12%*	*12%*
20,001 – 50,000	278	*21%*	*19%*
50,001 – 100,000	164	*11%*	*11%*
100,001 – 200,000	153	*9%*	*10%*
Over 200,000	237	*17%*	*16%*
Total	**1,416**		
Admission			
Free	486	*37%*	*37%*
Paid	930	*63%*	*63%*
Total	**1,416**		

Headlines: Admissions

Visitor attractions in England reported an annual increase in visits of 2% in 2017. This figure has remained consistent since the post-London Olympics boom in 2013 and 2014, when the country experienced a surge in visits from overseas.

Overseas visits remained stable. Despite the challenging macro environment, with terror attacks and Brexit to contend with, attractions in England were able to maintain 2016 levels of overseas visitors. The 2017 International Passenger Survey showed an increase in inbound visits to the UK – up 4% compared to 2016.

Local / day trip visits saw a 2% increase on the previous year. At 9%, Yorkshire outperformed the overall average considerably – Hull's role as the UK City of Culture for 2017 can be considered a key driver of this growth.

However, both child and schoolchildren admissions dropped back (by 7% and 2% respectively), driven by sites based in London and the South East, most likely due to security fears following the terror attacks.

The majority of attraction categories reported an increase in visitor admissions for 2017, with Other Historic Properties (+8%), Farms (+5%), Historic Houses / Palaces, Visitor / Heritage Centres and Places of Worship (all +4%) notably outstripping the overall average.

Other types of attraction did see slight falls in visitors: Museums / Art Galleries and Leisure / Theme Parks (-1%), Steam / Heritage Railways and Wildlife Attractions / Zoos (-<1%). **In the case of Museums / Art Galleries, this was their second successive year of admissions decline** (-1% in 2016).

Attractions based in London were most likely to have experienced a reduction in visitors, with the region reporting a 2% drop, following on from a 1% decrease felt in 2016.

Headlines: Revenue, Admission Pricing & Marketing

At an overall level, gross revenue increased by 7% for the second consecutive year, with all categories of attraction reporting growth.

'Other' attraction types experienced the highest increases in gross revenue (10%), with Museums / Art Galleries and Gardens also reporting notable increases of 9%. At 2%, Workplaces and Country Parks were the categories with the lowest rates of growth.

Adult admission fees increased by an average of 4% in 2017 – slightly lower than the 6% reported in 2016, and more in line with the rate of inflation across this period (3.6%, Source: Bank of England).

The proportion of paid attractions also choosing to charge for child entry has remained level with 2016 (89%). However, child admission fees rose by 7%, compared with the 4% increase seen in 2016.

Marketing spend at attractions continues to grow, with 2017 seeing a net increase of +7 (17% increasing spend, 10% decreasing spend), consistent with 2016.

Visitor attractions that did report an increased marketing outlay were slightly more likely to have seen an increase in visitor numbers (6%, vs. 5% who reduced spend).

Interestingly, **this growth was driven by overseas visitors** - with attractions who increased marketing expenditure reporting twice as much growth from this visitor type as those who reduced their budget (8% vs. 4%).
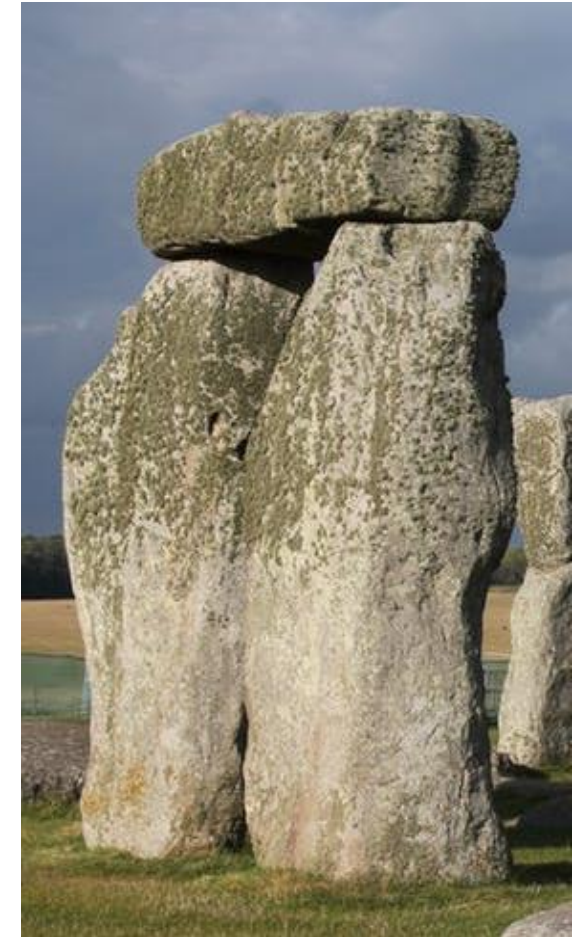
Headlines: Additional Income Generating Activities, Digital Communication & Employment

At 89%, the proportion of attractions using digital communications has increased slightly vs. recent years (88% in 2016, 85% in 2015). 93% of sites offer a website, with more than a third (37%) implementing online booking systems.

For the second consecutive year, Instagram and Pinterest saw the biggest growth, with 44% now using these sites - double the proportion seen in 2015 (22%).

There appears to have been a concerted move by attractions to focus their efforts on mainstream social media sites in 2017, with the proportion of sites using 'other' social media more than halving vs. 2016.

This focused approach seems to have been effective in attracting the local audience. Sites that used digital communications saw a 2% increase in visitors, whilst those not using digital channels reporting a 3% drop in admissions.

87% of visitor attractions engaged in additional income generating activities in 2017, identical to the level seen in 2016. Membership schemes are the most common, offered by almost six in ten attractions in England (59%).

Most other activities remained broadly similar with previous years. **Public Events were the notable exception, with a steady decline between 2012** (57%), and 2017 (49%).

The employment trends at attractions in 2017 were positive, with an 8% increase in permanent and seasonal workers, and a 16% increase in unpaid volunteers.

Expectations are that this growth will continue, with similar increases anticipated across all employment types in 2018.
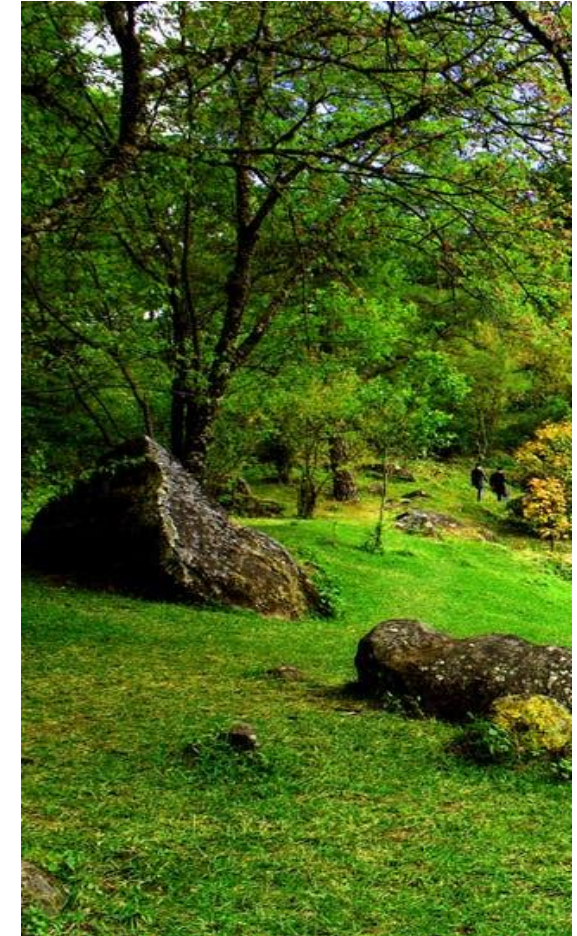
2017 Wider Context: Domestic and International Visitor Numbers and Weather Summary

Domestic and International Tourism Statistics

In 2017, there were 100.6 million domestic overnight trips of all purposes to England (up +1% on 2016), with this increase driven by a strong rise in domestic holiday trips, with 47.2 million domestic holidays to England recorded (up +6% on 2016). *Source: Great Britain Tourism Survey*

Domestic day visits to England however declined in 2017 (-3%), with 1.5 billion domestic day visits to England in 2017. *Source: Great Britain Day Visits Survey*

There was growth in international visits to the UK in 2017, with 39.2 million visits to the UK recorded (up +4% on 2016). *Source: International Passenger Survey*
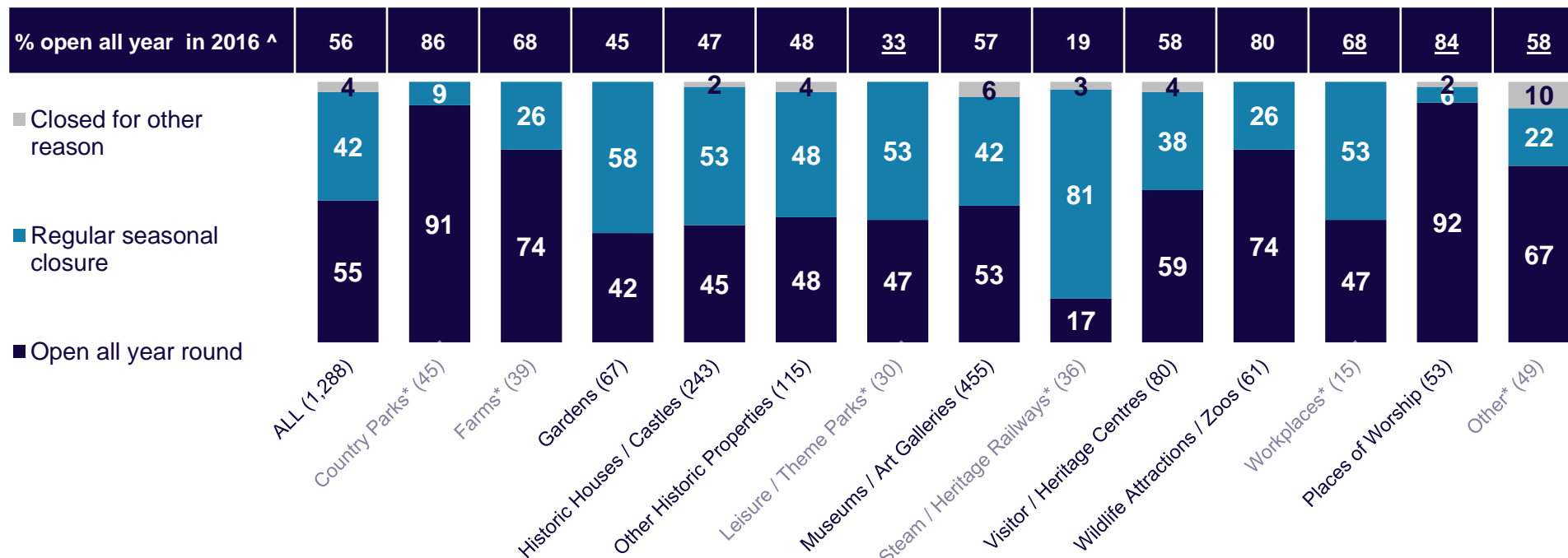
Weather Summary

2017 as a whole was slightly warmer than the UK average. The months from February to June were all warmer than average, whilst the later portion of the year saw temperatures nearer to average, with the exception of a warm October. The majority of places were within 10% of the yearly average for rainfall.

Source: MET Office

Attraction Opening: By Attraction Category

In 2017 55% of attractions remained open throughout the year, consistent with 2016 (56%). As traditionally seen, country parks and places of worship were the most likely to remain open all year around. Steam and heritage railways remain the attraction type most likely to have closed at some point during the year, with 84% reporting this to be the case.

4% of attractions were closed for 'other' reasons (e.g. restoration work), consistent with the levels seen in previous years.

% open all year in 2016 ^	56	86	68	45	47	48	33	57	19	58	80	68	84	58

Chart legend:
- Closed for other reason
- Regular seasonal closure
- Open all year round

Categories (x-axis): ALL (1,288), Country Parks* (45), Farms* (39), Gardens (67), Historic Houses / Castles (243), Other Historic Properties (115), Leisure / Theme Parks* (30), Museums / Art Galleries (455), Steam / Heritage Railways* (36), Visitor / Heritage Centres (80), Wildlife Attractions / Zoos (61), Workplaces* (15), Places of Worship (53), Other* (49)

Data values (Closed for other reason / Regular seasonal closure / Open all year round):
- ALL: 4 / 42 / 55
- Country Parks*: — / 9 / 91
- Farms*: — / 26 / 74
- Gardens: — / 58 / 42
- Historic Houses / Castles: 2 / 53 / 45
- Other Historic Properties: 4 / 48 / 48
- Leisure / Theme Parks*: — / 53 / 47
- Museums / Art Galleries: 6 / 42 / 53
- Steam / Heritage Railways*: 3 / 81 / 17
- Visitor / Heritage Centres: 4 / 38 / 59
- Wildlife Attractions / Zoos: — / 26 / 74
- Workplaces*: — / 53 / 47
- Places of Worship: 2 / 6 / 92
- Other*: 10 / 22 / 67

N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Signifies the base size is below 50 (greyed out)
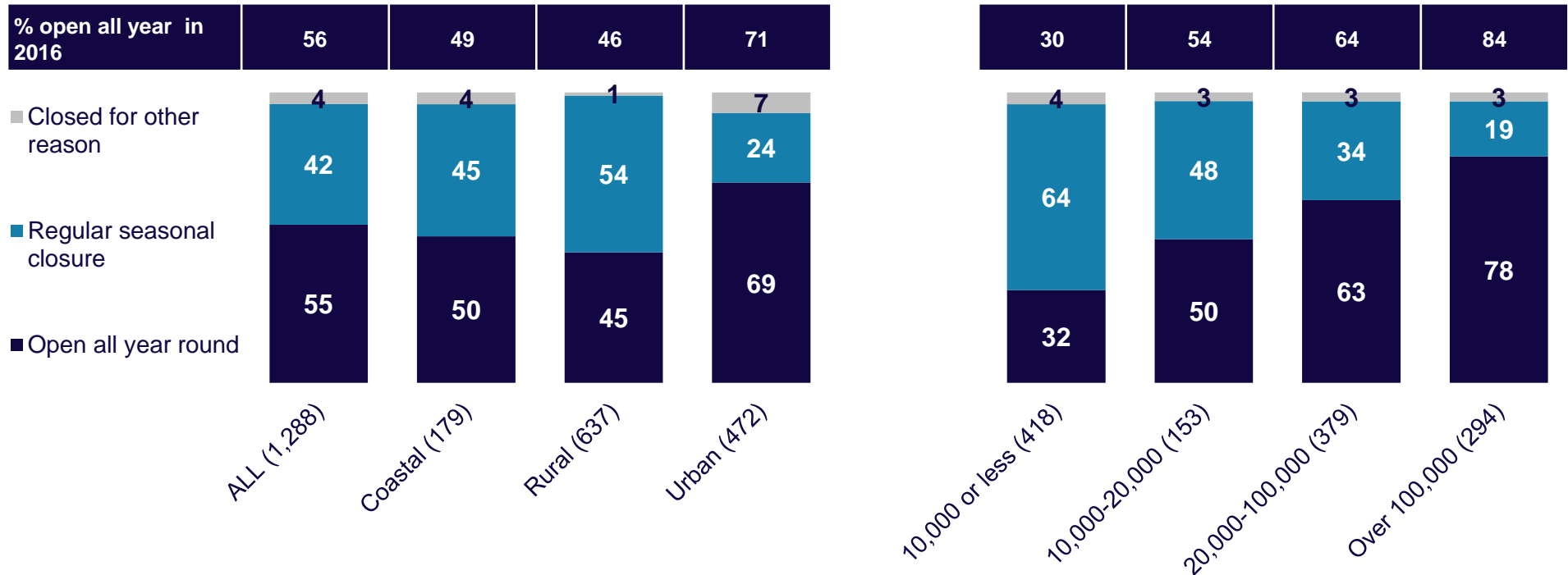^Underlined scores indicate 2017 % 'open all year round' significantly different from 2016

Attraction Opening: By Destination Type & Attraction Size

Urban attractions were notably more likely to stay open for the whole of 2017 (69%), than their counterparts in coastal and rural England (50% and 45% respectively).

As seen in previous years, there is a strong correlation between attraction size and the likelihood of the site staying open all year round. Almost 4 in 5 attractions with over 100,000 visitors per year stayed open all year round, compared with less than a third of attractions with 10,000 visitors or less.

% open all year in 2016	56	49	46	71		30	54	64	84

Legend:
- ■ Closed for other reason
- ■ Regular seasonal closure
- ■ Open all year round

First chart (by destination type):

Category	Closed for other reason	Regular seasonal closure	Open all year round
ALL (1,288)	4	42	55
Coastal (179)	4	45	50
Rural (637)	1	54	45
Urban (472)	7	24	69

Second chart (by attraction size):

Category	Closed for other reason	Regular seasonal closure	Open all year round
10,000 or less (418)	4	64	32
10,000-20,000 (153)	3	48	50
20,000-100,000 (379)	3	34	63
Over 100,000 (294)	3	19	78

Base: All attractions answering opening times question (1,288)

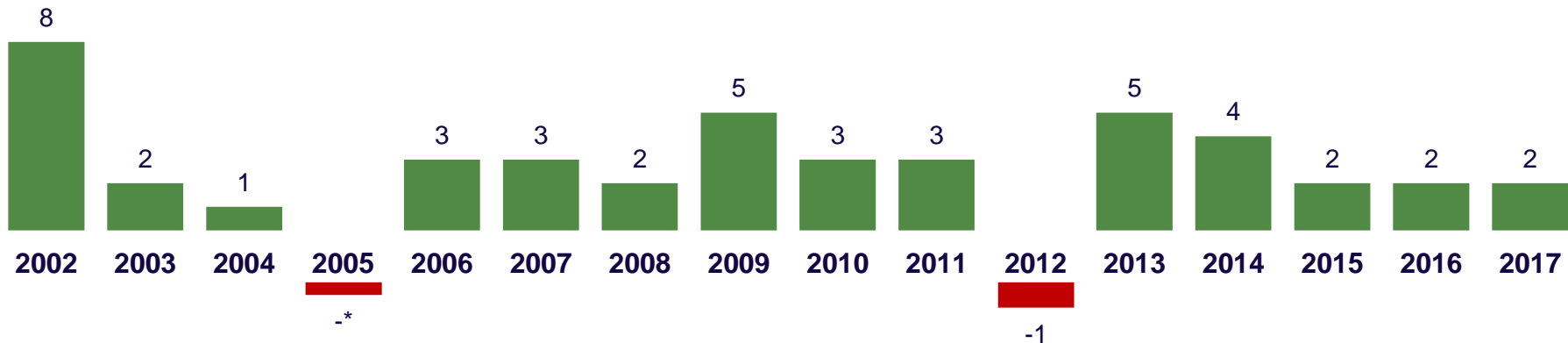13

Visitor Admission Trends

Overall Visitor Admission Trends

Overall, attractions in England reported a 2% annual increase in total visits in 2017, consistent with the levels seen in 2015 and 2016..
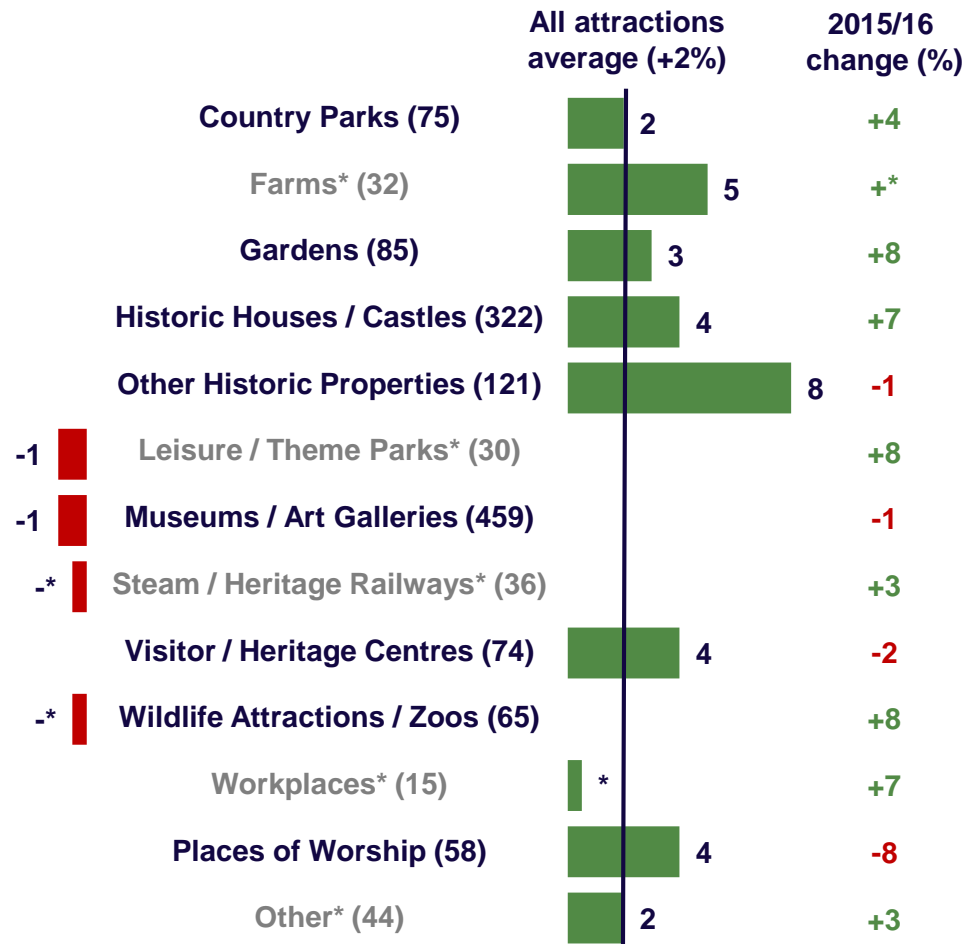
To a large extent, this slow down in growth since 2013 and 2014 has been driven by a decrease in visits to London attractions, which have fallen by a total of 7% since then.

Annual % change in visits

Visitor admission trends 2017: By Attraction Category

Category	All attractions average (+2%)	2015/16 change (%)
Country Parks (75)	2	+4
Farms* (32)	5	+*
Gardens (85)	3	+8
Historic Houses / Castles (322)	4	+7
Other Historic Properties (121)	8	-1
Leisure / Theme Parks* (30)	-1	+8
Museums / Art Galleries (459)	-1	-1
Steam / Heritage Railways* (36)	-*	+3
Visitor / Heritage Centres (74)	4	-2
Wildlife Attractions / Zoos (65)	-*	+8
Workplaces* (15)	*	+7
Places of Worship (58)	4	-8
Other* (44)	2	+3

The majority of attraction types who reported decreases for 2016, reported improved performance in 2017, with Other Historic Properties (-1% in 2016, +8% in 2017), Visitor /Heritage Centres (-2% in 2016, +4% in 2017) and Places of Worship (-8% in 2016, +4% in 2017) all rebounding.

The exception to this is museums / art galleries , for whom visitor numbers fell back for the second consecutive year (-1% in both 2016 and 2017). This was largely driven by those based in London, who saw a 4% drop in visitor numbers in 2017.

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Base size below 50 (greyed out)

Index of Visits to Attractions: Calculation

The charts presented on slides 18 and 19 show the **indexed visits trend** for each attraction category. The **base year for the index is 1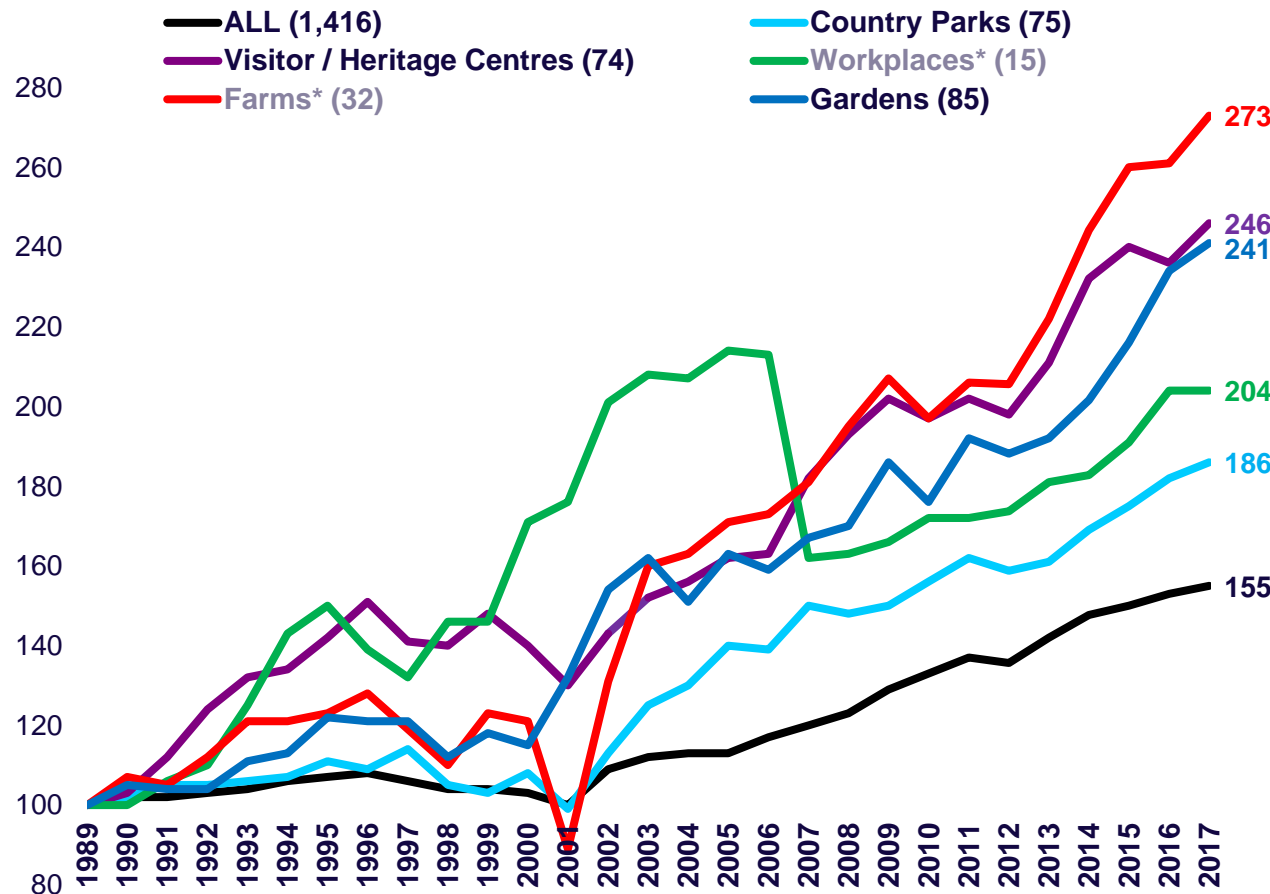989, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. visits to museums / art galleries increased +4% between 1989 and 1990, increasing the index for 1990 to 104.

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.

Index of Visits to Attractions: Sectors **Outperforming** vs. Market

Legend:
- ALL (1,416)
- Visitor / Heritage Centres (74)
- Farms* (32)
- Country Parks (75)
- Workplaces* (15)
- Gardens (85)

This chart shows the attraction categories which have shown above average annual visit increases since 1989. **Across England attractions as a whole ('all'), visits have increased by 55% during that time (index of 155).**
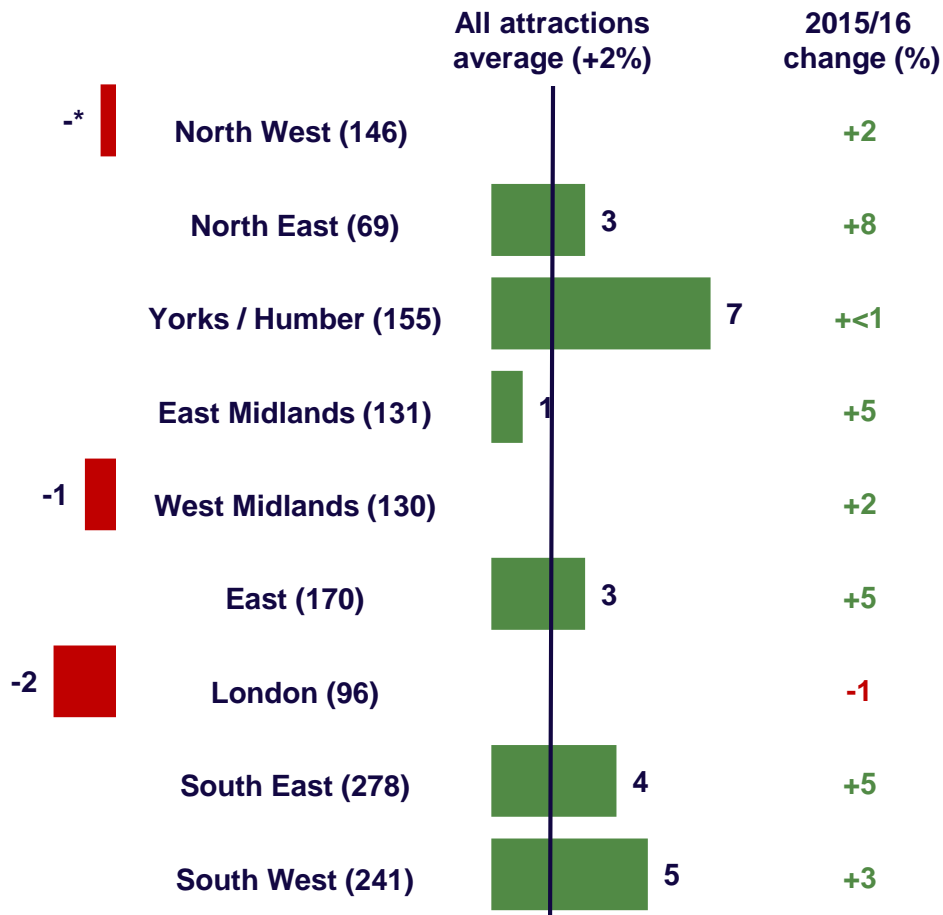
With an index of 273, Farms have recorded the largest increase in visitor admissions since 1989, with growth accelerated over the last fifteen years, following the foot and mouth outbreak in 2001.

Visitor / Heritage Centres and Gardens have also performed extremely well during this period.

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Base size below 50 (greyed out)

Index of Visits to Attractions: Sectors **Underperforming** vs. Market

Legend:
- **ALL (1,416)**
- **Historic Properties (443)**
- Leisure / Theme Parks* (30)
- Steam / Heritage Railways* (36)
- **Wildlife Attractions / Zoos (65)**
- **Museums / Art Galleries (459)**

This chart shows the attraction categories which have shown below average annual visit increases since 1989. **Across England attractions as a whole ('all'), visits have increased by 55% during that time (index of 155).**

2017 was a generally difficult period for sectors exhibiting below average growth, with the change in admissions from four of the five categories lower than the attractions sector average.

Historic Properties were the exception to this, with their index growing at a faster rate than the sector average - increasing from 130 in 2016 to 137 in 2017.
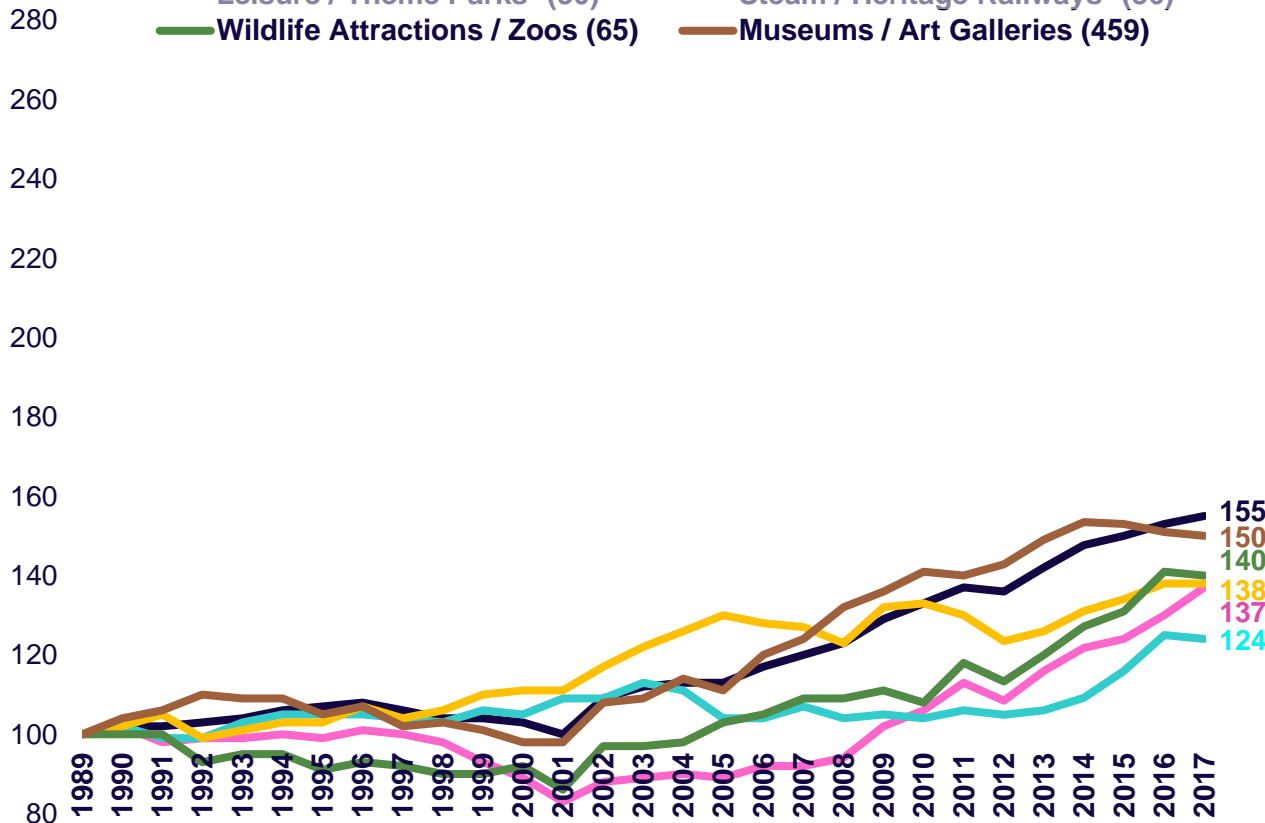
Data point labels (2017): 155, 150, 140, 138, 137, 124

Y-axis: 80, 100, 120, 140, 160, 180, 200, 220, 240, 260, 280

X-axis: 1989–2017

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Base size below 50 (greyed out)

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Visitor Admission Trends 2017: By Region

	All attractions average (+2%)	2015/16 change (%)
-* North West (146)		+2
North East (69)	3	+8
Yorks / Humber (155)	7	+<1
East Midlands (131)	1	+5
-1 West Midlands (130)		+2
East (170)	3	+5
-2 London (96)		-1
South East (278)	4	+5
South West (241)	5	+3

Yorkshire / Humber (7%) reported the highest levels of visitor growth of any in region in 2017, supported by attractions in Hull, which was the 'UK City of Culture' in 2017.

Meanwhile, attractions in Southern England also fared well, with the South West and South East regions increasing by 5% and 4% respectively.

Growth rates did slow in other areas, from 8% (2016) to 3% (2017) in the North East and from 5% (2016) to 1% (2017) in the East Midlands.

Visitors to London have fallen for the third year in succession (-2% in 2017, -1% in 2016 and -3% in 2015. In 2017 this will, at least in part, have been driven by the 4 terror related attacks that occurred in London between March and September 2017.

Drops were also seen in the North West (no doubt affected by the Manchester terror attack in June 2017) and West Midlands.
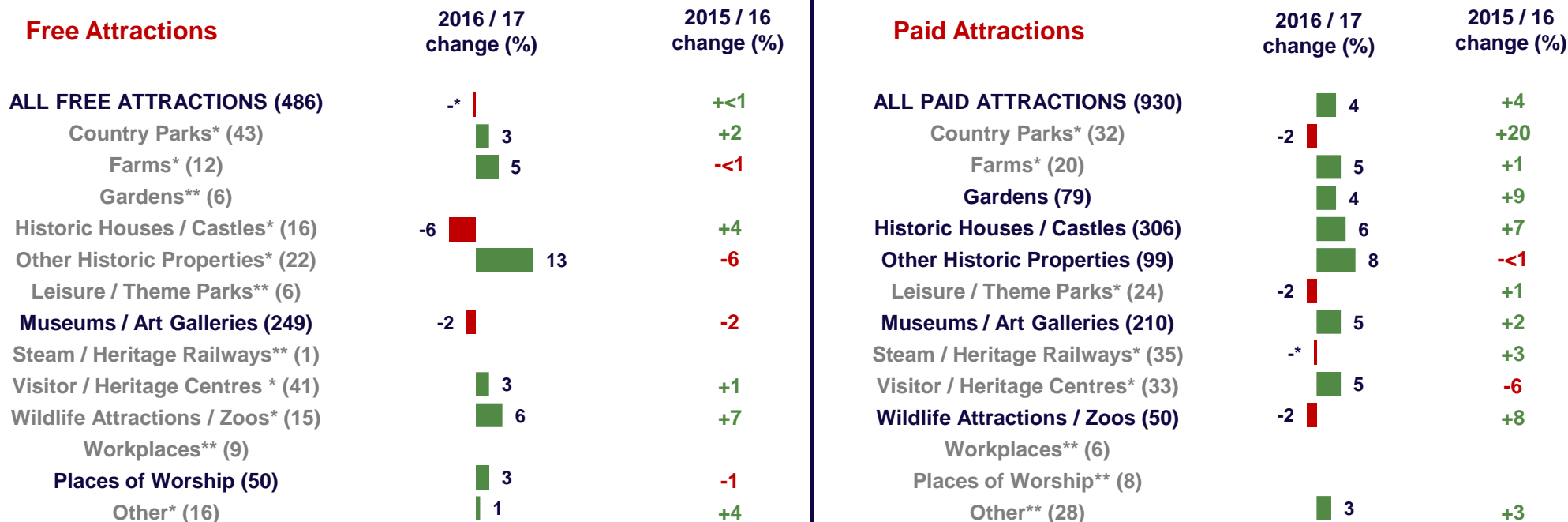
Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2017: By Admission Charge, Geographic Location & Size

	All attractions average (+2%)	2015/16 change (%)
Free (486)	-*	+<1
Paid (930)	4	+4
Coastal (177)	5	+4
Rural (726)	3	+5
Urban (513)	*	-<1
20,000 visits or less (584)	4	-1
20,001 – 50,000 visits (278)	4	+2
50,001 – 200,000 visits (317)	5	+3
Over 200,000 visits (237)	1	+2
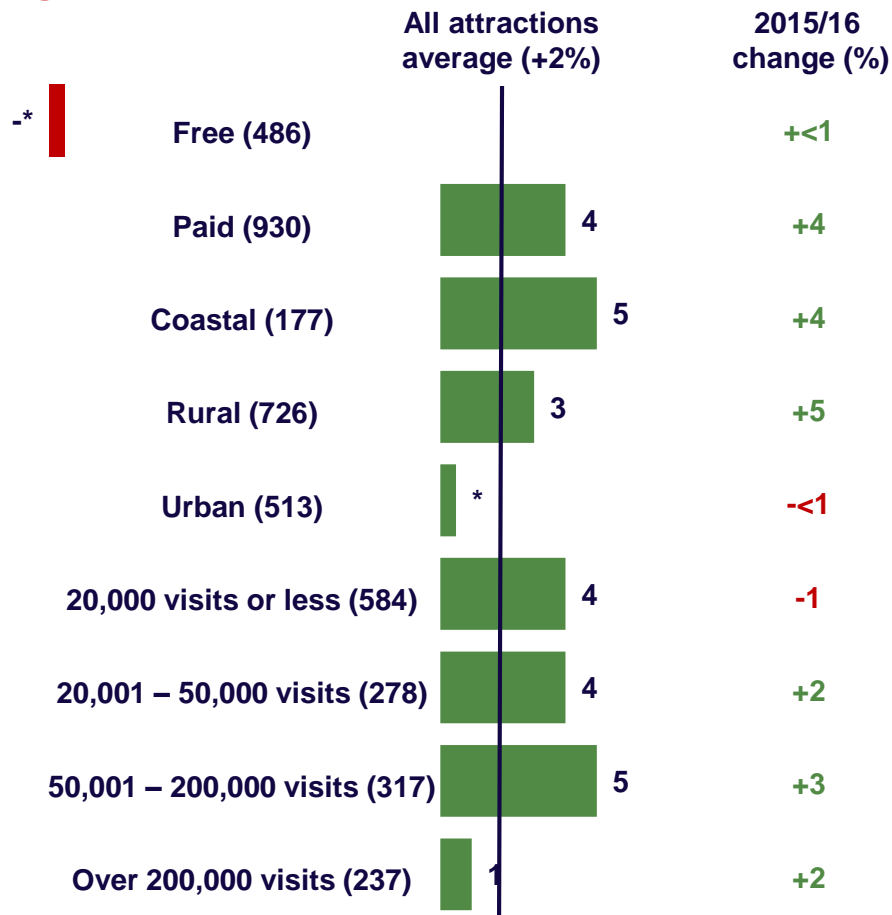
The 2% average visitor admissions increase can be attributed to paid sites (4%), as visits to free attractions actually reduced slightly, albeit by less than 1%.

Attractions in urban locations saw a minimal growth increase – heavily affected by the drop in visits to London sites. In contrast, coastal and rural attractions reported strong levels of growth, at similar levels to previous years.

The decline in visits to London attractions is also reflected in attraction size data, with larger attractions reporting the lowest levels of growth.

In contrast, small and mid-sized attractions all reported strong levels of growth (4-5%) at higher levels than seen in 2016.

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

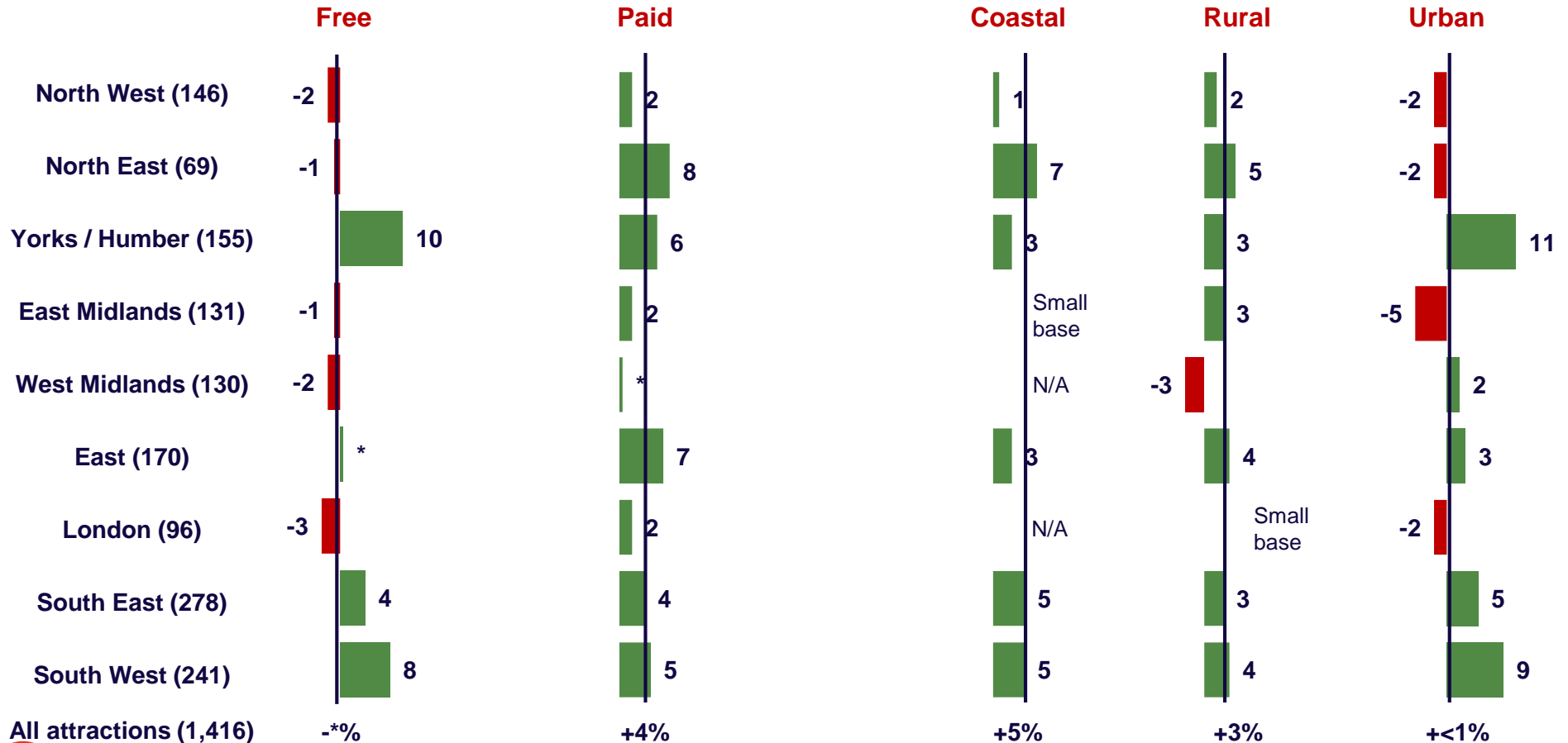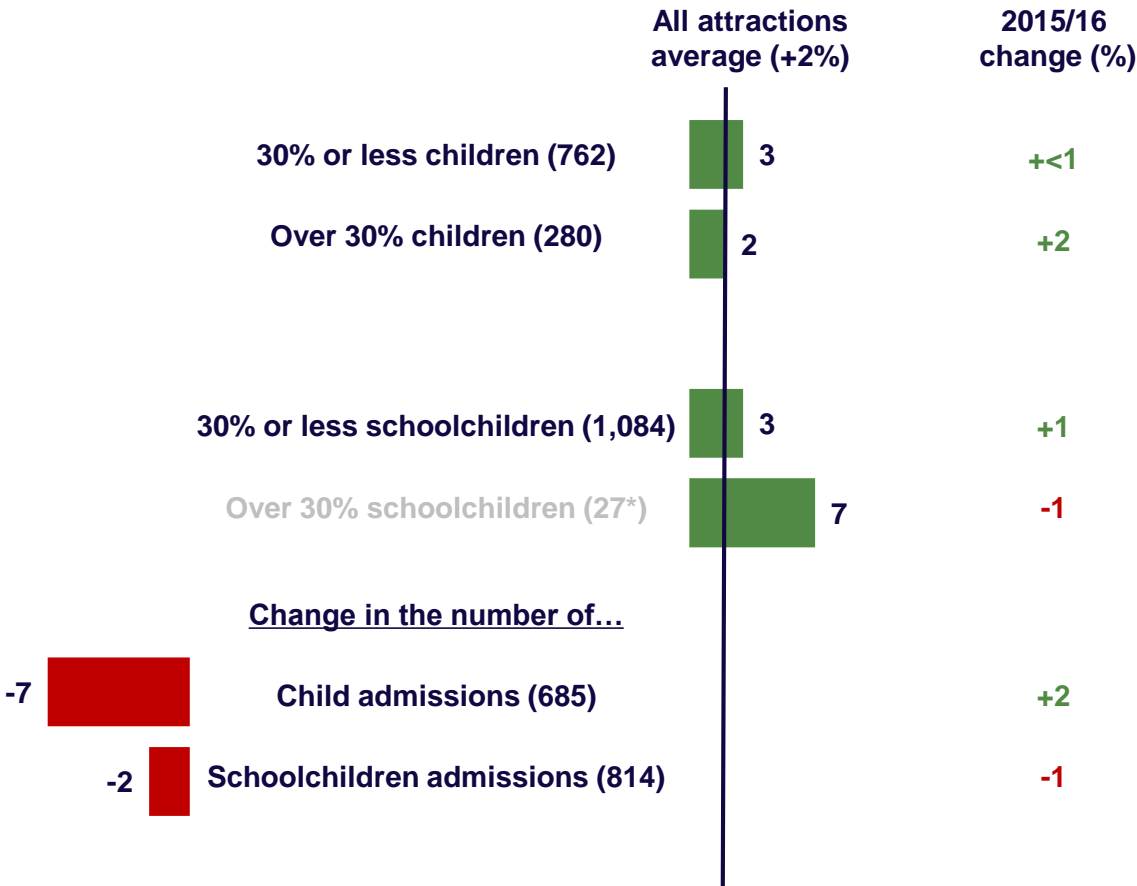# Visitor Admission Trends 2017: Paid & Free Attractions

Paid attractions reported a 4% increase in visits in 2017, with significant increases from historic properties.

Free attractions reported a negligible decrease in visits overall (less than 1%) in 2017. This was largely driven by a decline in visits to museums/ art gallery category (-2%), which is by far the largest free attraction type. Again, this decline is largely explained by the large London museums/ galleries, many of which suffered at least short term loss of visitors as a result of the 2017 London terror attacks.

Free Attractions	2016 / 17 change (%)	2015 / 16 change (%)
ALL FREE ATTRACTIONS (486)	-*	+<1
Country Parks* (43)	3	+2
Farms* (12)	5	-<1
Gardens** (6)		
Historic Houses / Castles* (16)	-6	+4
Other Historic Properties* (22)	13	-6
Leisure / Theme Parks** (6)		
Museums / Art Galleries (249)	-2	-2
Steam / Heritage Railways** (1)		
Visitor / Heritage Centres * (41)	3	+1
Wildlife Attractions / Zoos* (15)	6	+7
Workplaces** (9)		
Places of Worship (50)	3	-1
Other* (16)	1	+4

Paid Attractions	2016 / 17 change (%)	2015 / 16 change (%)
ALL PAID ATTRACTIONS (930)	4	+4
Country Parks* (32)	-2	+20
Farms* (20)	5	+1
Gardens (79)	4	+9
Historic Houses / Castles (306)	6	+7
Other Historic Properties (99)	8	-<1
Leisure / Theme Parks* (24)	-2	+1
Museums / Art Galleries (210)	5	+2
Steam / Heritage Railways* (35)	-*	+3
Visitor / Heritage Centres* (33)	5	-6
Wildlife Attractions / Zoos (50)	-2	+8
Workplaces** (6)		
Places of Worship** (8)		
Other** (28)	3	+3

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Base size below 50 (greyed out)/ **Base size less than 10 (omitted)

Visitor Admission Trends 2017: Other Regional Dimensions

	Free	Paid	Coastal	Rural	Urban
North West (146)	-2	2	1	2	-2
North East (69)	-1	8	7	5	-2
Yorks / Humber (155)	10	6	3	3	11
East Midlands (131)	-1	2	Small base	3	-5
West Midlands (130)	-2	*	N/A	-3	2
East (170)	*	7	3	4	3
London (96)	-3	2	N/A	Small base	-2
South East (278)	4	4	5	3	5
South West (241)	8	5	5	4	9
All attractions (1,416)	-*%	+4%	+5%	+3%	+<1%

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2017: Child Visits Summary

All attractions average (+2%)

2015/16 change (%)

Category	All attractions average value	2015/16 change (%)
30% or less children (762)	3	+<1
Over 30% children (280)	2	+2
30% or less schoolchildren (1,084)	3	+1
Over 30% schoolchildren (27*)	7	-1

Change in the number of…

Category	Value	2015/16 change (%)
Child admissions (685)	-7	+2
Schoolchildren admissions (814)	-2	-1

Just over a quarter (27%) of attractions reported that children made up a significant proportion (over 30%) of their visitors, consistent with 2016, and growth was consistent with the attraction average (2%). Growth was marginally higher for those with lower child admissions (3%).

However, the proportion of child admissions has dropped back by 7% overall, heavily driven by sites in the London and South Eastern regions.

During the previous three years, school admissions had been declining. This has continued in 2017 - with a 2% decrease.

Base: All attractions providing visits data for current and previous year (1,416)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based. * Base size below 50 (greyed out)

Visitor Admission Trends 2017: By Visitor Origin

Perceptions of visitor volume

■ Down ■ Similar ■ Up
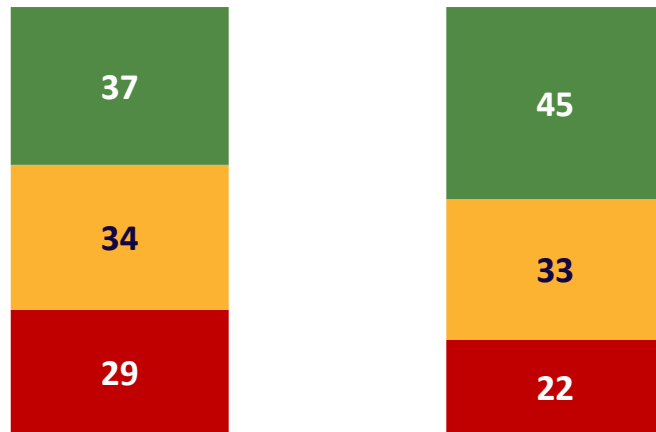
	Up	Similar	Down
Overseas Visitors (1,179)	37	34	29
Local / Day Tripper (1,178)	45	33	22

In 2017, more sites reported an increase (37%) in overseas visitors than a decrease (29%), but this was not reflected in the year-on-year change of absolute visitor numbers across all sites, which remained consistent with 2016.

Slightly under half (45%) of sites reported an increase in local / day trip visitors in 2017, with just 22% reporting a decrease. As a result, local / day trip visitors grew by 2%, a slowing in growth compared with the 4% increase seen in 2016.

% change in visits 2017

+<1% in visits
Overseas (733)

+2% in visits
Local / Day (729)
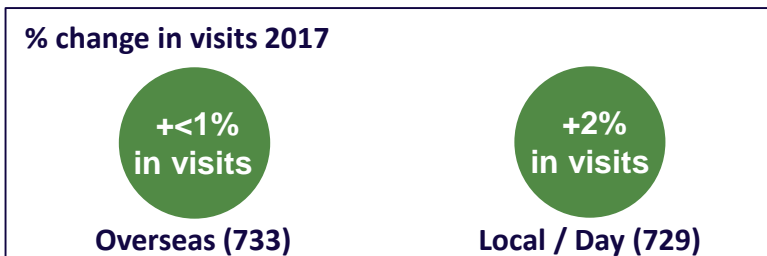
Base: All answering overseas / local visitor question (1,181)
Base: All attractions providing visits data for current and previous year (1,416)

25

Visitor Admission Trends 2017: Overseas Visitors by Attraction Category

Attraction Category: Overseas Visitors

% down		% up	2016/17 % change
-11	Country Parks* (36)	42	▲ 17%
-12	Farms* (33)	30	▼ 19%
-20	Gardens (61)	51	▲ 6%
-41	Historic Houses / Castles (224)	36	▲ 3%
-46	Other Historic Properties (107)	28	▲ 12%
-31	Leisure / Theme Parks* (29)	28	▼ 7%
-27	Museums / Art Galleries (418)	39	▼ 11%
-26	Steam / Heritage Railways* (34)	44	▲ 2%
-21	Visitor / Heritage Centres (73)	29	▲ 33%
-15	Wildlife Attractions / Zoos (52)	42	▲ 7%
-14	Workplaces* (14)	57	
-31	Places of Worship (51)	41	▲ 6%
-21	Other* (47)	28	▼ 17%

Overseas visits to Visitor / Heritage Centres and Country Parks saw the biggest increases in overseas visitors in 2017.

Overseas visitors to Farms, 'Other' attractions that do not fit into the listed categories and Leisure/ Theme Parks all fell. Museums / Art Galleries – by far the largest attraction type for overseas visitors – dropped back by 11%.

Base: All answering overseas visitor question (1,179); * Base size below 50 (greyed out);
Base: All attractions providing visits data for current and previous year (733); Base size below 10 (removed)

# Visitor Admission Trends 2017: Overseas Visitors by Region

Region: Overseas Visitors

% down			**% up**	**2016/17 % change**
-31	North West (131)	38	▲ 6%
-34	North East (62)	34	▼ 11%
-30	Yorks / Humber (141)	36	▼ <1%
-33	East Midlands (117)	27	▼ 6%
-36	West Midlands (105)	36	▼ 15%
-22	East (142)	39	▲ 5%
-37	London (71)	39	▼ 2%
-27	South East (213)	38	▲ 3%
-25	South West (197)	42	▲ 13%
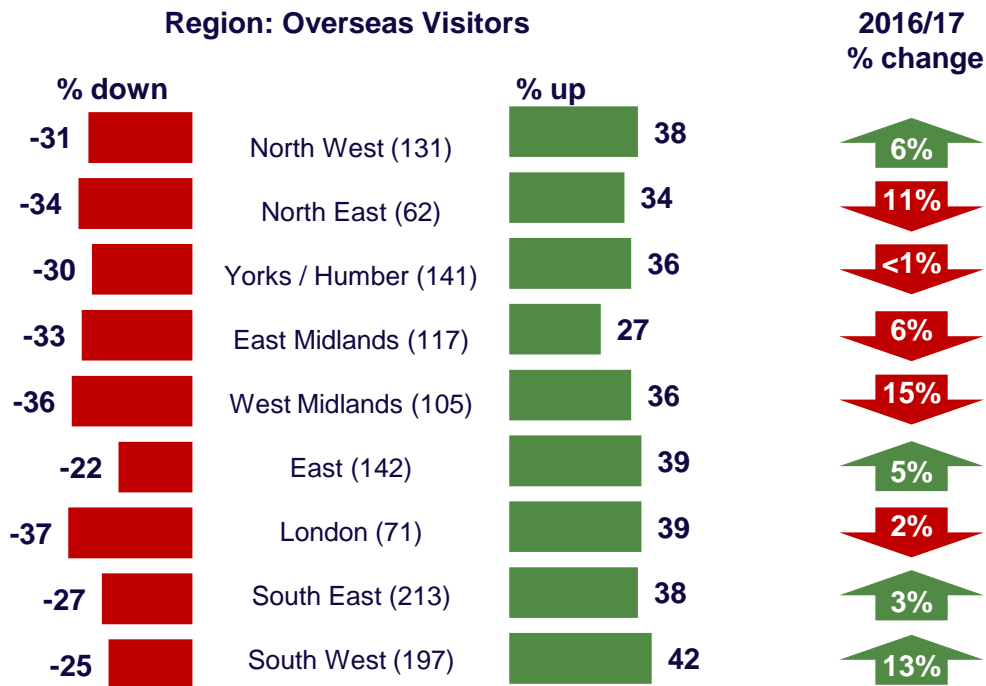
Following on from 2016, London saw a further decrease in overseas visitors in 2017 (-2%).

There were strong increases in visitation from this market to the South West (+13%), building on growth in 2016 (+9%).

However, overseas visits fell back in the East and West Midlands (-6% and -15% respectively) and in the North East (-11%).

Base: All answering overseas visitor question (1,179)
Base: All attractions providing visits data for current and previous year (733)

27

Visitor Admission Trends 2017: Overseas Visitors by Admission Charge & Size

Admission Charge: Overseas Visitors

% down		% up	2016/17 % change
-27	Free (438)	35	12%
-30	Paid (741)	38	7%

Size: Overseas Visitors

% down		% up	
-28	Up to 20k p.a. (568)	35	14%
-33	20k – 50k p.a. (231)	33	17%
-27	50k – 200k p.a. (221)	42	4%
-30	Over 200k p.a. (159)	47	2%
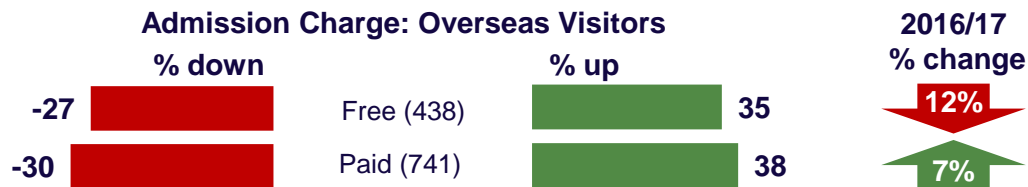
The increase in overseas visits in 2017 helped the performance of paid (admissions up by 7%) , but not free (admissions down 12%) attractions.

2016 saw a shift in the overseas attractions market, with smaller attractions seeing increased levels of overseas visitors and larger attractions struggling.

However, the trend in 2017 differs from this and is more consistent with the trends seen in 2014 and 2015, with larger attractions once again seeing stronger levels of growth from the overseas market whilst smaller attractions (especially those with less than 50,000 visitors) struggled.

Base: All answering overseas visitor question (1,179)
Base: All attractions providing visits data for current and previous year (733)
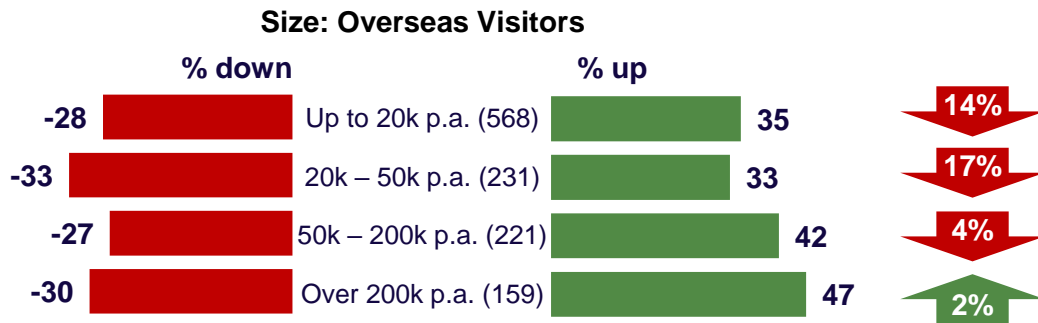
Visitor Admission Trends 2017: Local / Day Trip Visitors by Attraction Category

Attraction Category: Local / Day Trip Visitors

% down	Category	% up	2016/17 % change
-18	Country Parks* (39)	39	▲ 5%
-12	Farms* (34)	41	▲ 3%
-22	Gardens (59)	46	▲ 8%
-16	Historic Houses / Castles (226)	60	▲ 8%
-15	Other Historic Properties (105)	59	▲ 12%
-32	Leisure / Theme Parks* (28)	32	▲ <1%
-27	Museums / Art Galleries (416)	41	▼ 1%
-26	Steam / Heritage Railways* (35)	49	▼ 1%
-27	Visitor / Heritage Centres (70)	24	▲ 4%
-13	Wildlife Attractions / Zoos (56)	38	▲ 1%
-29	Workplaces* (14)	50	
-27	Places of Worship* (49)	37	▼ <1%
-21	Other* (48)	33	▼ 3%
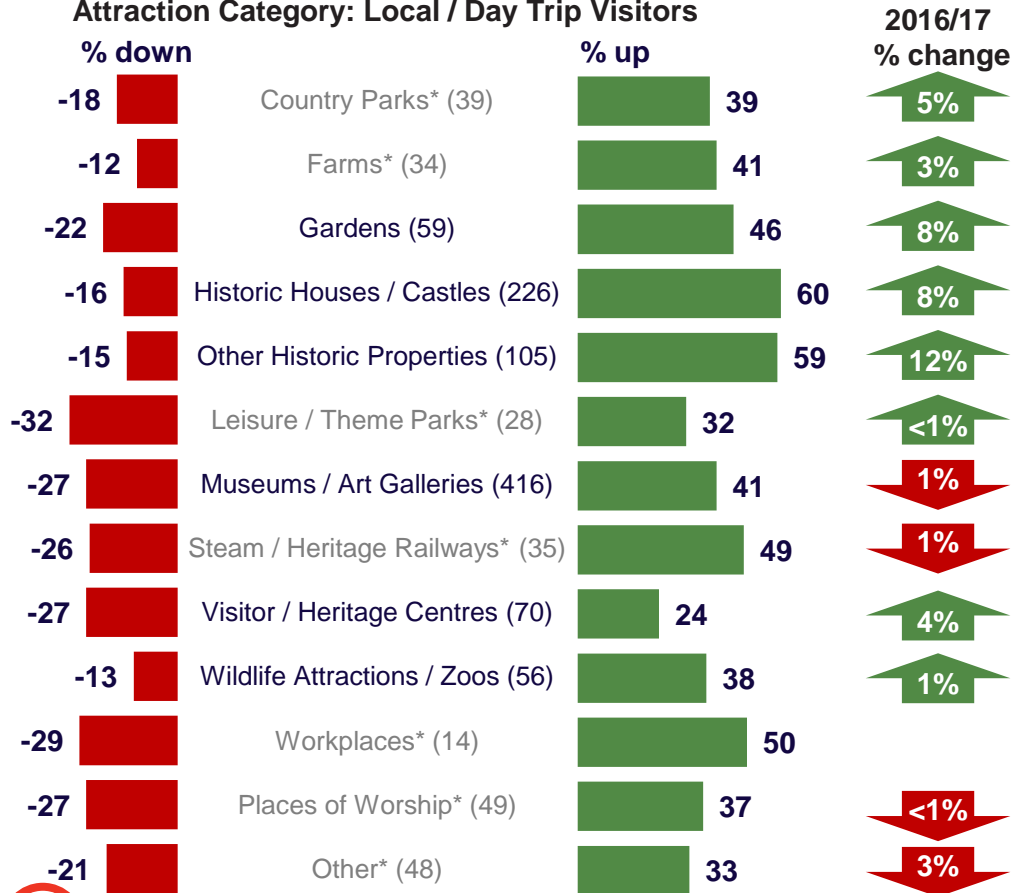
The majority of attraction types experienced growth from the local / day trip visitors in 2017, following the trend seen in 2016 and 2015.

The only exceptions to this were Other attractions (-3%), and Steam / Heritage Railways (-1%), Museums / Art Galleries (-1%) and Places of Worship (-<1%) which reported negligible decreases.

Growth in the local audience was strongest for historical properties.

Base: All answering local visitor question (1,178); * Base size below 50 (greyed out)
Base: All attractions providing visits data for current and previous year (729); Base size below 10 (removed)

Visitor Admission Trends 2017: Local / Day Trip Visitors by Region

Region: Local / Day Trip Visitors

% down	Region	% up	2016/17 % change
-26	North West (128)	48	▲ 1%
-16	North East (63)	60	▲ 4%
-21	Yorks / Humber (141)	45	▲ 9%
-26	East Midlands (117)	44	▲ <1%
-24	West Midlands (107)	48	▲ 1%
-16	East (142)	43	▲ 4%
-24	London (68)	38	▼ 3%
-21	South East (216)	45	▲ <1%
-22	South West (197)	41	▲ 7%

With the exception of London, all regions of England reported growth in local / day trip visitors for 2017 vs. 2016.

Yorkshire & Humber (9%), the South West (7%), the East and North East (both 4%) experienced the highest increases.

Base: All answering local visitor question (1,178)
Base: All attractions providing visits data for current and previous year (729)

Visitor Admission Trends 2017: Local / Day Trip Visitors by Admission Charge & Size

Admission Charge: Local / Day Trip Visitors

% down		% up	2016/17 % change
-25	Free (439)	39	▲ 1%
-20	Paid (739)	49	▲ 4%
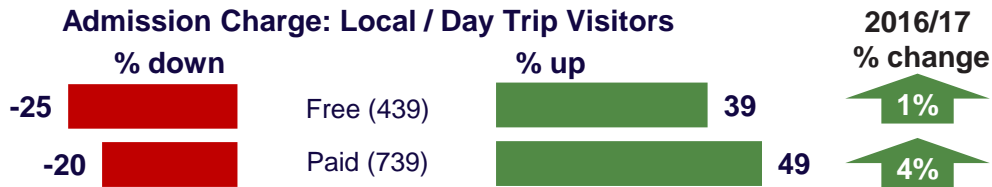
Attractions that charged for entry saw significantly more growth from the local / day trip market as attractions with free entry (4% vs. 1%).

Attractions with 50,000 visitors per year and under achieved the highest levels of growth from this audience in 2017 (up to 20,000 visitors – 6%, 20,000-50,000 visitors – 7%).

Size: Local / Day Trip Visitors

% down		% up	% change
-21	Up to 20k p.a. (571)	44	▲ 6%
-20	20k – 50k p.a. (232)	47	▲ 7%
-24	50k – 200k p.a. (221)	45	▲ 3%
-28	Over 200k p.a. (157)	47	▲ 2%

Base: All answering local visitor question (1,178)
Base: All attractions providing visits data for current and previous year (729)

Visitor Admission Trends 2017: Family Group Visitors by Attraction Category

Attraction Category: Family Group Visitors

% visiting in a family group (mean share)

% down	Category	% up	(mean share)
	Country Parks* (38)	13	55%
-3	Farms* (32)	13	69%
	Gardens (58)	26	29%
-5	Historic Houses / Castles (219)	41	28%
-2	Other Historic Properties (103)	44	33%
-4	Leisure / Theme Parks* (28)	18	68%
-6	Museums / Art Galleries (402)	17	29%
-6	Steam / Heritage Railways* (34)	18	56%
-8	Visitor / Heritage Centres (65)	14	28%
-5	Wildlife Attractions / Zoos (57)	16	44%
-8	Workplaces* (13)	15	35%
-7	Places of Worship* (46)	15	18%
-7	Other* (44)	7	29%

Intuitively, farms (69%) and Leisure / Theme Parks (68%) were the categories attracting the highest proportion of family groups.

At 18%, Places of Worship had by far the lowest proportion of family visits – significantly less than the next lowest (Historic Houses / Castles, 28%).

Base: All answering family group question (1,044); * Base size below 50 (greyed out); Base size below 19 (removed)
Base: All answering family group question (1,139)

Visitor Admission Trends 2017: Family Group Visitors by Region

Region: Family Group Visitors

% of total visitors in a family group (mean share)
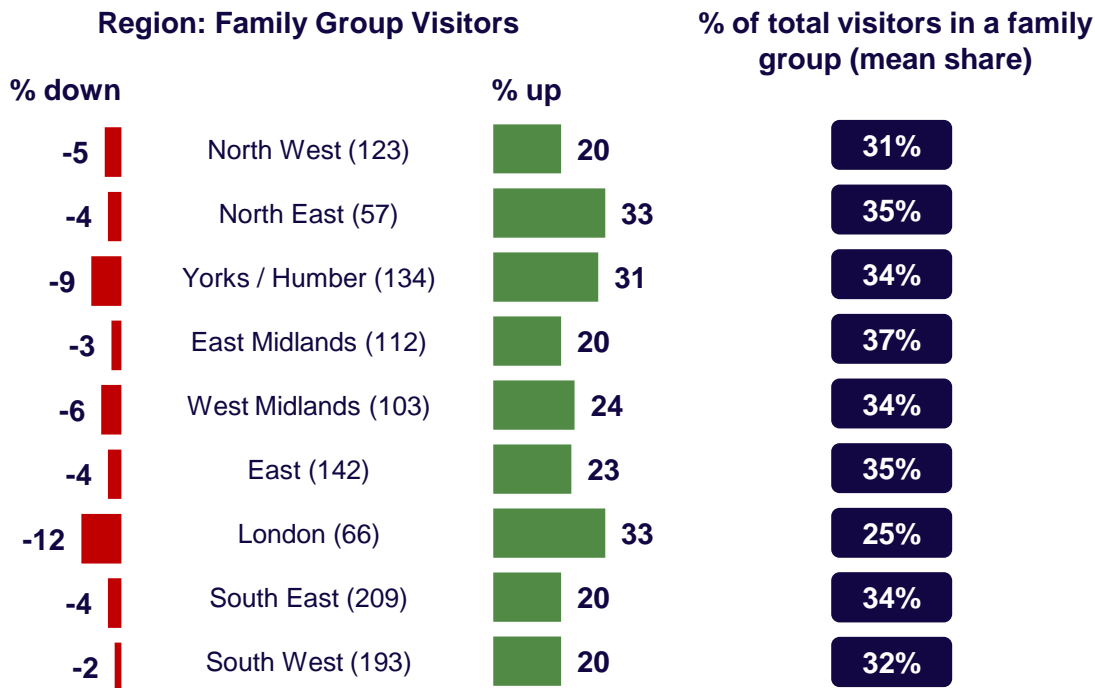
Only one in four visits to attractions in the capital were as part of a family group – the lowest of any region.

The proportions of family visits to other regions were fairly consistent, ranging between 31%-37%..

% down	Region	% up	% of total
-5	North West (123)	20	31%
-4	North East (57)	33	35%
-9	Yorks / Humber (134)	31	34%
-3	East Midlands (112)	20	37%
-6	West Midlands (103)	24	34%
-4	East (142)	23	35%
-12	London (66)	33	25%
-4	South East (209)	20	34%
-2	South West (193)	20	32%

Visitor Admission Trends 2017: Family Group Visitors by Admission Charge & Size

Admission Charge: Family Group Visitors

% down

% up

| -5 | Free (423) | 14 |
| -4 | Paid (716) | 29 |

% of total visitors in a family group (mean share)
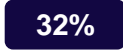
32%
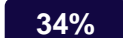
34%

The difference in family group visits between free and paid attractions were negligible.

There is a strong correlation between attraction size and the proportion of family visits, with larger sites far more likely to have attracted a higher incidence of this audience in 2017.

Size: Family Group Visitors

% down

% up

-5	Up to 20k p.a. (553)	23	26%
-5	20k – 50k p.a. (223)	27	38%
-3	50k – 200k p.a. (212)	22	41%
-7	Over 200k p.a. (151)	23	42%
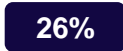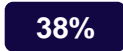
Base: All answering family group question (1,044)
Base: All answering family group question (1,139)

Admission Charge & Revenue Trends

Adult Admission Charges 2017

Charge band	%
Over £30.00* (31)	3
£20.01 - £30.00* (16)	2
£15.01 - £20.00 (54)	6
£12.01 - £15.00 (70)	8
£10.01 - £12.00 (88)	10
£9.01 - £10.00 (60)	7
£8.01 - £9.00 (69)	8
£7.01 - £8.00 (88)	10
£6.01 - £7.00 (89)	10
£5.01 - £6.00 (85)	9
£4.01 - £5.00 (99)	11
£3.01 - £4.00 (64)	7
£2.01 - £3.00 (51)	6
£2.00 or less* (49)	5

The average adult admission charge amongst paid for attractions increased from £8.75 in 2016 to £8.99 in 2017, an increase of 24p.

The incidence of attractions charging £5.00 or less for an adult admission ticket now stands at less than three in ten (29%). This continues the downward trend seen in recent years (41% in 2013, 39% in 2014, 35% in 2015, 32% in 2016).

29% of attractions charged £10 or more for an adult admission ticket in high season in 2017. While this is an increase compared with 2016 (27%), the rate of increase has slowed from previous years (21% in 2015, 16% in 2014).

In 2017, the average child admission charge was £5.85. Over a third of charging attractions now charge over £5 for child entry (36%, up from 32% in 2016).

Adult Admission Charge Trends 2017: By Attraction Category

At an overall level adult admission fees increased by 4% in 2017 – slightly lower than in 2016 (6%), but consistent with the three years prior. This increase is similar to the level of inflation seen over the same period (3.6%, source: Bank of England).

The attraction types with the highest admission charges are Leisure / Theme parks (£18.73), Wildlife Attractions / Zoos (£10.29) and Historic Houses / Castles (£9.05). The high figure for country parks is driven by a single multi-attraction operator who classify their attractions as country parks.

Whilst the proportion of paid attractions also charging for child entry remained consistent with 2016 (89%). **Child admission charges increased by 7% in 2017**. This compares with an increase of 4% in 2016. With the inflation of adult admission prices slowing (perhaps as they reach tolerance levels), some attractions are clearly using child admissions as an alternative way of boosting revenue.

% change in adult admission charge

	All attractions average (+4%)	Average 2017 charge	2015/16 change (%)
ALL ATTRACTIONS (658)	4	£8.99	+6
Country Parks* (29)	1	£28.10	+8
Farms* (11)	3	£8.50	+2
Gardens (57)	6	£7.81	+8
Historic Houses / Castles (253)	4	£9.05	+9
Other Historic Properties (77)	8	£7.69	+2
Leisure / Theme Parks* (12)	1	£18.73	+4
Museums / Art Galleries (133)	4	£6.04	+5
Steam / Heritage Railways* (22)	7	£8.95	+5
Visitor / Heritage Centres* (18)	5	£6.75	+2
Wildlife Attractions / Zoos* (23)	3	£10.29	+2
Workplaces** (4)			
Places of Worship** (5)			
Other* (14)	*	£9.39	+3

Base: All answering admission charge question (658); * Base size below 50 (greyed out);
Base: All answering admission charge question (913); Base size below 10 (removed)

Adult Admission Charge Trends 2017: By Region

All regions in England have seen a rise in average adult admission charges in 2017, ranging between 3 and 6%. For most, this followed increases in 2016 (with attractions based in the North East the only exception).

As seen previously, attractions charging for entry in London have the highest admission fees in the country (£11.65), followed by the South East (£9.94) and the North West (£9.45).

% change in adult admission charge

	All attractions average (+4%)	Average 2017 charge	2015/16 change (%)
North West (63)	4	£9.45	+4
North East* (32)	6	£7.55	-<1
Yorks / Humber (62)	6	£8.24	+9
East Midlands (69)	5	£8.89	+7
West Midlands (65)	3	£8.73	+7
East (72)	4	£7.62	+8
London* (35)	5	£11.65	+9
South East (134)	3	£9.94	+4
South West (126)	5	£8.81	+5

Adult Admission Charge Trends 2017: By Attraction Size

There is a strong correlation between the number of visitors to an attraction and the price of admission.

Sites with 20,000 visitors or less per year charge £6.24 on average, whilst the mean score for sites with over 200,000 visitors was £14.22.

With a 5% increase, sites who attract 100-200k visitors a year were the only attraction type to outstrip the overall average.

Whilst all attraction sizes have increased admission charges, none have matched the level of growth seen in 2016.

% change in adult admission charge

	All attractions average (+4%)	Average 2017 charge	2015/16 change (%)
20,000 or less p.a. (260)	4	£6.24	+6
20,001 – 50,000 p.a. (137)	4	£9.46	+8
50,001 – 100,000 p.a. (87)	4	£9.96	+6
100,001 – 200,000 p.a. (76)	5	£11.43	+5
Over 200,000 p.a. (98)	4	£14.22	+5

£

Adult Admission Charge Trends 2017: By Geographic Location & Child Admissions

Although rural attractions have seen the lowest proportional increase in 2017 (3%), still have the highest admission fees for adults (£9.53), ahead of urban (£8.37) and coastal attractions (£7.58).

As seen previously, attractions with more than 30% child visits typically charge higher adult admission fees than those with fewer than 30% child visits (£9.78 vs. £7.41).

The same is true for child admission prices: attractions with more than 30% child visits charge £7.26 on average for child entry, compared with £4.46 at those where children make up less than 30% of their visitors.

% change in adult admission charge

	All attractions average (+4%)	Average 2017 charge	2015/16 change (%)
Coastal (79)	5	£7.58	+6
Rural (413)	3	£9.53	+5
Urban (166)	6	£8.37	+8
Attractions with…			
30% or fewer child visits (360)	5	£7.41	+6
Over 30% child visits (99)	6	£9.78	+4
30% or less overseas visits (449)	5	£7.88	+6
Over 30% overseas visits* (35)	6	£12.28	+5
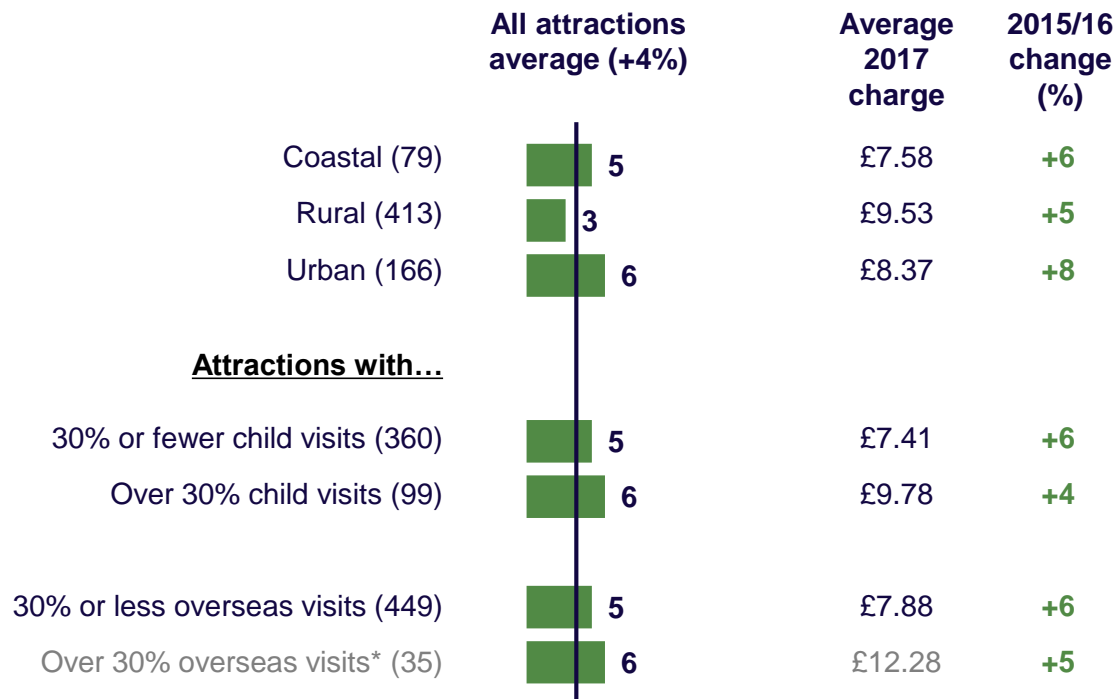
Gross Revenue Trend

% change in gross revenue

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
5	5	8	5	5	1	5	5	5	7	7

% change adult admission charges

Gross revenue up (258)	5.4
Gross revenue similar (180)	4.7
Gross revenue down (71)	4.8
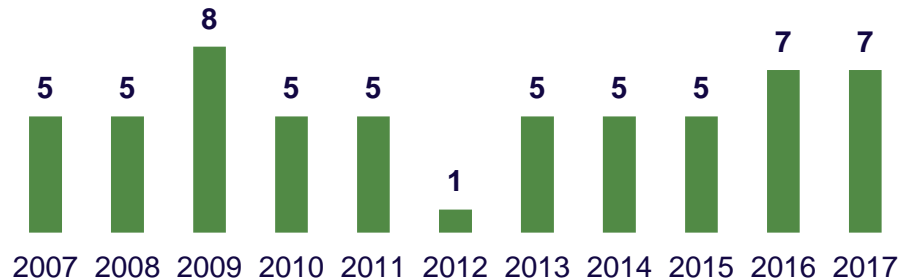
At an overall level, the gross revenue at visitor attractions increased by 7% in 2017, consistent with the level seen in 2016.

45% of attractions reported an increase in gross revenue in 2017, whilst 14% reported a decrease – identical to the figure reported in 2016.

Up until 2015 we saw a correlation between change in admission charges and revenue, with increases in entrance fees having a direct, positive impact on attractions' bottom line.

However, we have not seen such an association during the last couple of years. This was again demonstrated in 2017, where the proportional increase in admissions charges for sites that saw gross revenue drop was at a similar level to those that saw gross revenue increase (4.8% vs. 5.4%).

It seems that other internal and external factors are having more impact on gross revenue than in the past.

Gross Revenue Trend 2017: By Attraction Category

In 2017, all types of attraction increased their gross revenue. 'Other' attraction types reported the highest increases in gross revenue (10%), followed by Museums / Art Galleries and Gardens (both 9%).

At 2% Workplaces and Country Parks saw the lowest gross revenue increase.

All attractions (+7%)

Attraction	Value	2015/16 change (%)
Country Parks* (38)	2	+5
Farms* (34)	7	+3
Gardens (51)	9	+8
Historic Houses / Castles (209)	6	+19
Other Historic Properties (98)	7	+9
Leisure / Theme Parks* (26)	4	+27
Museums / Art Galleries (370)	9	+2
Steam / Heritage Railways* (30)	5	+2
Visitor / Heritage Centres (63)	3	+8
Wildlife Attractions / Zoos* (45)	3	+5
Workplaces* (13)	2	+4
Places of Worship* (37)	3	-1
Other* (41)	10	+4
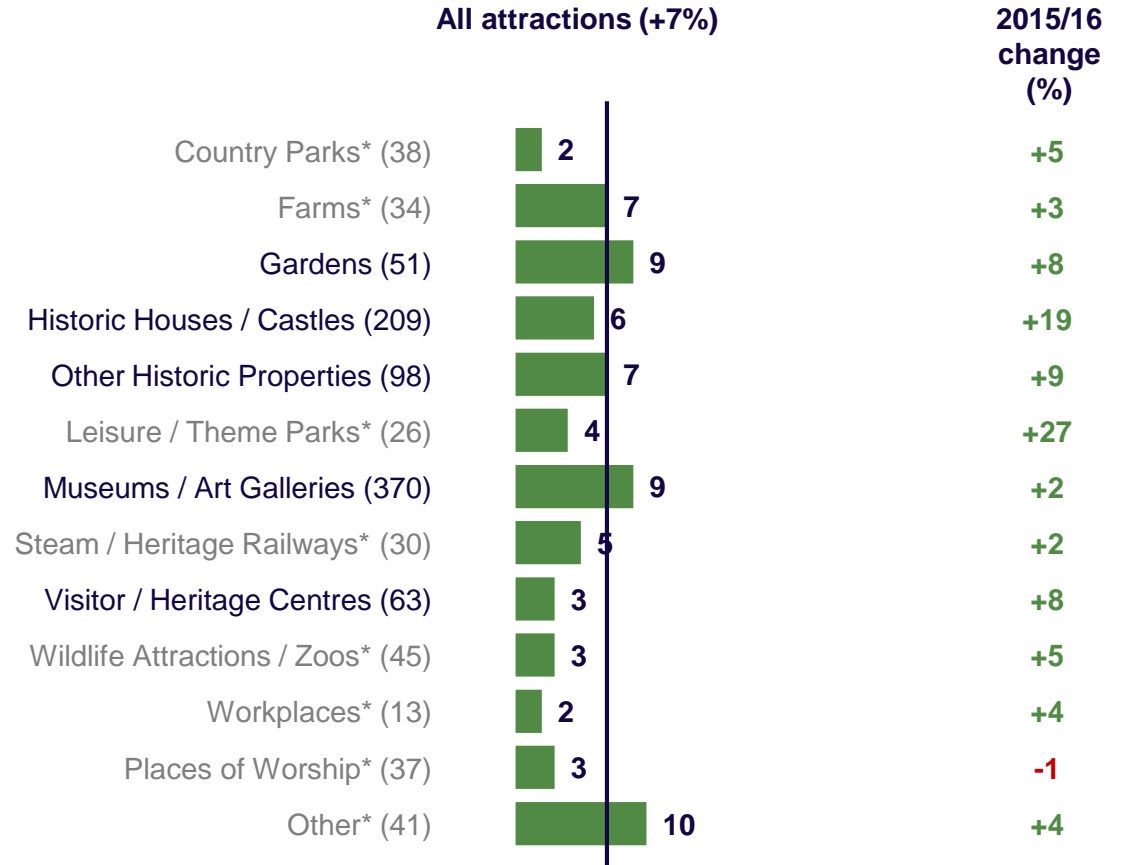
Gross Revenue Trend 2017: By Region

All English regions reported an increase in their gross revenue in 2017.

For the third year running, attractions in the South East reported the highest increase in revenue (10%). London based sites also increased gross revenue by 10% in 2017 despite visitor admissions falling back by 2%; this highlights the importance of other activities to the underlying financial health of attractions.

All attractions (+7%)

2015/16 change (%)

Region	Value	2015/16 change (%)
North West (107)	5	+6
North East (57)	6	+6
Yorks / Humber (123)	5	+7
East Midlands (105)	6	+8
West Midlands (91)	6	+6
East (132)	7	+6
London (59)	10	+8
South East (193)	10	+10
South West (188)	6	+7
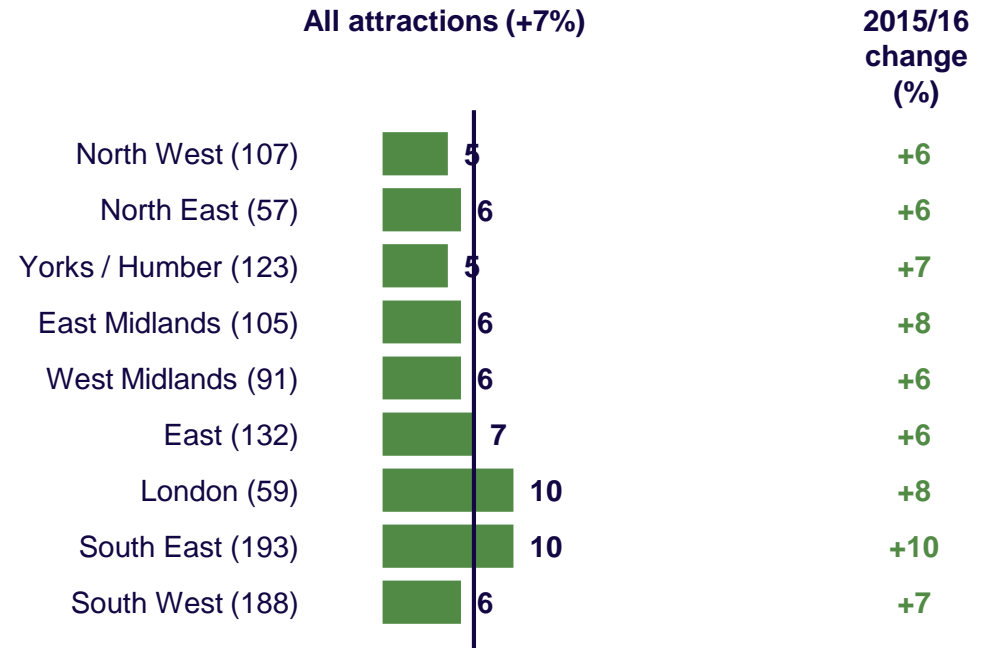
Gross Revenue Trend 2017: By Admission Charge, Destination Type & Visit Volume

Paid attractions increased their gross revenue by twice the level of free sites (8% vs. 4%). This reflects the significantly higher increase in admissions numbers also reported by charging attractions (slide 21).

When looking at geographic locations, rural sites reported the highest increase in gross revenue (8%), closely followed by urban sites (7%).

Gross revenue for coastal attractions (which have reported the highest increase last year) dropped back to 3%; this may be explained by the wet and unsettled weather over the summer months reducing consideration of coastal destinations.

There looks to be no association between gross revenue and visitor volumes. Revenue increases were highest amongst attractions with visitor volumes of 20k-50k visitors per year (10%), with all other attractions sizes reporting growth of 6%.

All attractions (+7%)

	Chart value	2015/16 change (%)
Free (400)	4	+2
Paid (655)	8	+11
Coastal (149)	3	+12
Rural (533)	8	+7
Urban (373)	7	+6
Up to 20k p.a. (521)	6	+8
20k – 50k p.a. (205)	10	+8
50k – 100k p.a. (111)	6	+6
100k – 200k p.a. (94)	6	+11
Over 200k p.a. (124)	6	+5
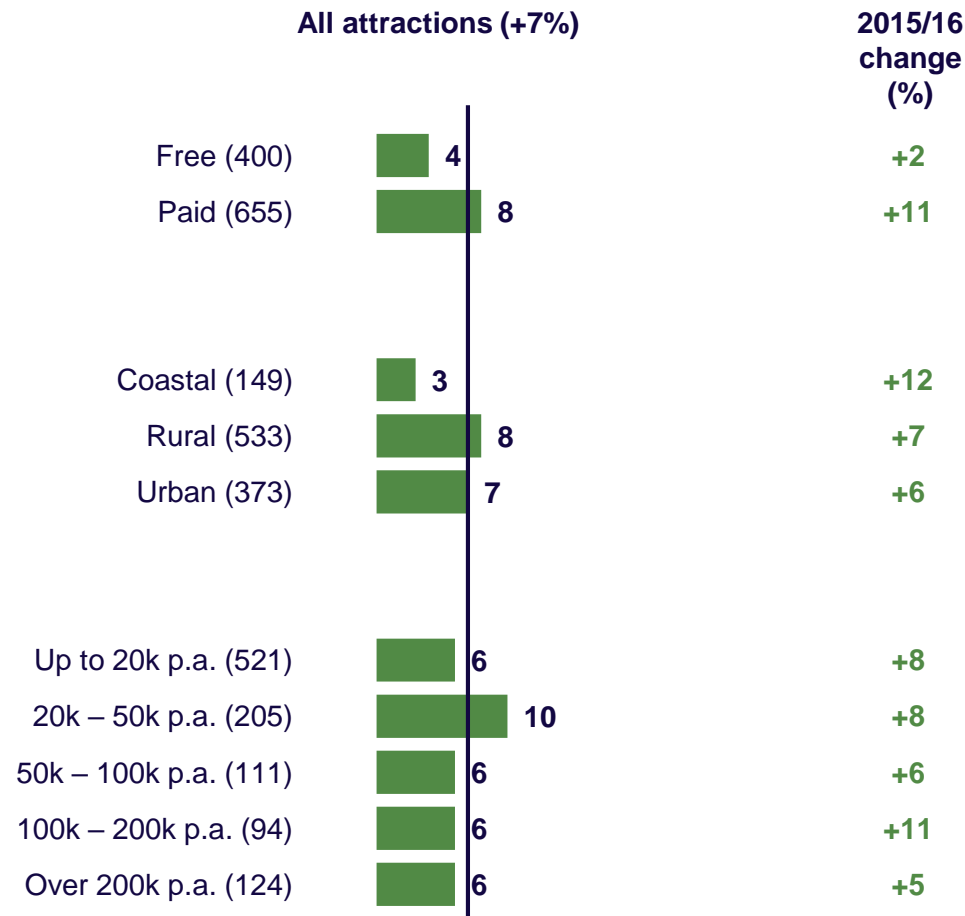
Marketing & Communications

©VisitBritain/ Jason Hawkes

Website & Online Booking Facilities

% offered in 2017

% offered	Website	Online Booking
Under 10k visits p.a.	87	14
10k - 20k visits p.a.	95	24
20k - 100k visits p.a.	97	43
100k - 200k visits p.a.	100	67
Over 200k visits p.a.	98	74
Free attractions	89	30
Paid attractions	96	42
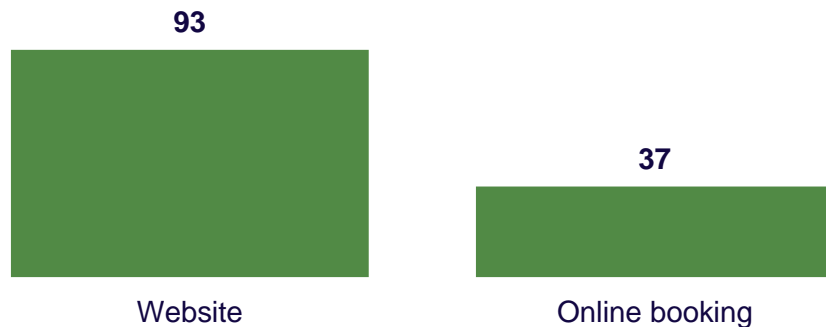
93% of all attractions, (and even 87% of attractions with under 10,000 visitors per annum) had a website in 2017.

Offering online booking facilities increased significantly between 2015 and 2016, but now seem to have levelled off, with 37% of attractions using this technology. As you might expect, larger attractions are far more likely to offer this provision than their smaller counterparts (74% of sites with over 200,000 visits, compared with only 14% of sites with fewer than 10,000 visitors). 67% of sites falling within the 100,000-200,000 visitors band have this facility, up from 55% in 2016.

Online booking is much more likely to be offered by paid attractions (42%) than free attractions (30%), although this gap has narrowed when compared to the previous year.

Other Digital Communications Offered

At 89%, the proportion of attractions utilising any form of digital communications has slightly increased compared to previous years (88% and 85% in 2016 and 2015 respectively). Facebook (85%) and Twitter (69%) continue to be the dominant platforms used by attractions.

The influence of Instagram and Pinterest continues to exponentially increase year-on-year, with 44% of attractions now using the photo-sharing sites – an 8% increase vs. 2016, and double the proportion using these sites in 2015. Historic Houses / Castles (64%) and Leisure / Theme Parks (63%) are the heaviest users of these channels. The attractions sector appears to have been more focused on these main social media sites in 2017, with fewer (9% vs. 19% in 2016 using 'other social media').

The suite of digital communications attractions utilise tends to increase according to size. Nevertheless, four in five sites with fewer than 20,000 visitors still offered some form of digital communications in 2017.

	% offered in 2017	%'16	%'15
ANY	89	88	85
Facebook page	85	82	78
Twitter account	69	68	67
E-newsletter	49	47	43
Instagram / Pinterest	44	36	22
YouTube	32	31	32
Online blogs	31	28	32
Mobile apps	19	20	20
Mobile website	10	11	12
Other social media	9	19	10

% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	80	96	98
Facebook page	74	95	96
Twitter account	51	82	90
E-newsletter	34	54	71
Instagram / Pinterest	27	53	66
YouTube	19	36	52
Online blogs	20	35	46
Mobile apps	13	20	29
Mobile website	4	11	22
Other social media	4	8	20

Base: All answering digital communications question (1,295)

Digital Communications Offered in 2017: By Attraction Category

% offering	Country Parks	Farms	Gardens	Historic houses / castles	Other historic properties	Leisure / theme parks	Museums / art galleries	Steam / heritage railways	Visitor / heritage centres	Wildlife / zoos	Work-places	Places of Worship	Other
ANY	**94**	**97**	**87**	**94**	**81**	**97**	**88**	**94**	**84**	**97**	**87**	**74**	**84**
Facebook	91	97	85	91	80	97	83	94	80	94	73	70	84
Twitter account	60	77	67	85	70	83	66	69	48	79	53	53	62
E-newsletter	28	59	46	64	50	73	46	42	36	52	40	36	30
Instagram/ Pinterest	15	54	45	64	54	63	38	33	19	53	20	23	40
YouTube	11	33	10	45	44	57	30	36	15	35	20	19	20
Online blogs	11	23	27	50	48	40	27	19	11	37	13	11	14
Mobile apps	13	5	10	49	42	13	8	8	11	15	-	9	2
Mobile website	9	5	15	7	6	30	12	6	8	16	20	9	4
Other social media	-	10	4	7	3	37	13	-	4	15	13	-	16
Website	**91**	**100**	**96**	**97**	**90**	**100**	**91**	**100**	**94**	**94**	**93**	**92**	**90**
Online booking	**34**	**41**	**33**	**35**	**28**	**83**	**35**	**61**	**34**	**56**	**27**	**38**	**30**

Base: All answering digital communications question (1,295)

48

Impact of Digital Communications: Summary

2016 / 17 change in…	Offer any digital communications (exc. website / online booking)?	
	Yes	**No**
Total visitor admissions	+2%	+<1%
Local visits	+2%	-3%
Overseas visits	+<1%	+2%
Gross revenue	+7%	+1%

Attraction use of digital communications is associated with growth in visitor admissions, with those utilising these platforms reporting a 2% increase in visitor admissions for 2017, compared with the <1% who did not.

Digital communications appeared to have a strong impact on the volume of local / day trip visitors in 2017, with those who used these channels seeing a 2% increase in visitors, vs. those who didn't reporting a drop of 3%.

Use of digital communications is also associated with higher gross revenue – 7% of those using any digital communications reported an increase in gross revenue, vs. just 1% who did not.

Marketing Expenditure Trend

% down	Year	% up
-10	2017	17
-11	2016	18
-9	2015	19
-11	2014	18
-12	2013	18
-16	2012	17
-13	2011	19
-14	2010	20
-11	2009	21
-11	2008	21
-12	2007	22
-11	2006	24
-10	2005	25

% down	2017	% up
-8	20,000 visits or less	15
-11	20,001-50,000 visits	17
-14	50,001-200,000 visits	20
-12	Over 200,000 visits	22
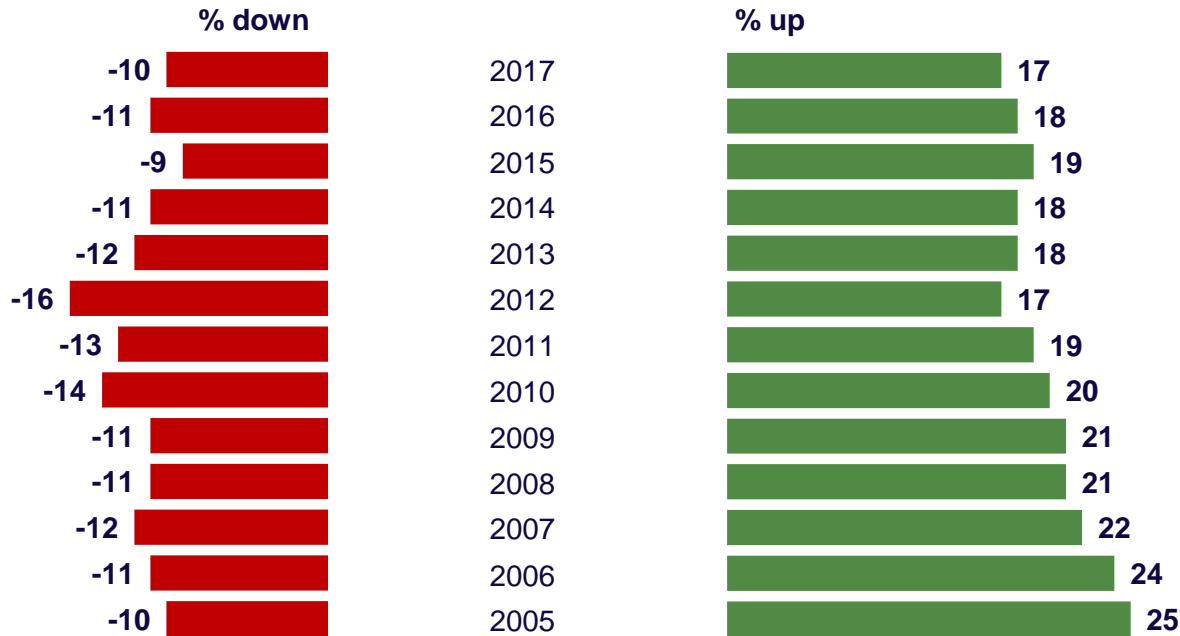
Marketing expenditure has remained relatively stable since 2012, following a significant fall in expenditure up to that point.

A net of 7% of attractions increase their marketing spending in 2017 (based on 17% increasing, minus 10% decreasing spend.

As seen historically, larger attractions are far more likely to increase their expenditure year-on-year, with 22% of sites attracting over 200,000 visitors per year increasing spending in 2017. This is the strongest net position (+10) of the different sized attractions. However, small attractions, with fewer than 20,000 visits a year show more consistency in their approach year on year, with less movement up or down.

Marketing Expenditure Trends 2017: By Attraction Category

% down
(All attractions -10%)

% up
(All attractions 17%)

% down	Category	% up
-12	Country Parks* (41)	7
-10	Farms* (39)	28
-9	Gardens (64)	22
-13	Historic Houses / Castles (236)	13
-10	Other Historic Properties (112)	13
-7	Leisure / Theme Parks* (29)	28
-10	Museums / Art Galleries (429)	21
-11	Steam / Heritage Railways* (35)	20
-8	Visitor / Heritage Centres (77)	16
-7	Wildlife Attractions / Zoos (59)	20
-7	Workplaces* (15)	13
-6	Places of Worship (51)	16
-17	Other* (48)	10

Farms and Leisure / Theme Parks were the attraction types most likely to have increased their marketing spend (both 28%).

Gardens, Museums / Art Galleries, Wildlife Attractions / Zoos and Steam / Heritage Railways were also more likely than average to have increased their marketing expenditure in 2017.

'Other' attraction types, Historic Houses/ Castles and Country Parks were the most likely categories to have experienced cuts in their marketing budgets in 2017 (17%, 13% and 12% respectively). For 'Other' attraction types and country parks, this meant a negative net position with more sites cutting spending than increasing.

Base: All answering marketing question (1,235)

Marketing Expenditure Trends 2017: By Region & Admission Charge

% down
(All attractions -10%)

% up
(All attractions 17%)

% down	Region	% up
-10	North West (127)	12
-9	North East (66)	8
-11	Yorks / Humber (141)	33
-11	East Midlands (121)	18
-16	West Midlands (109)	14
-9	East (151)	19
-12	London (74)	16
-7	South East (238)	15
-12	South West (208)	17
-10	Free (467)	14
-11	Paid (768)	19
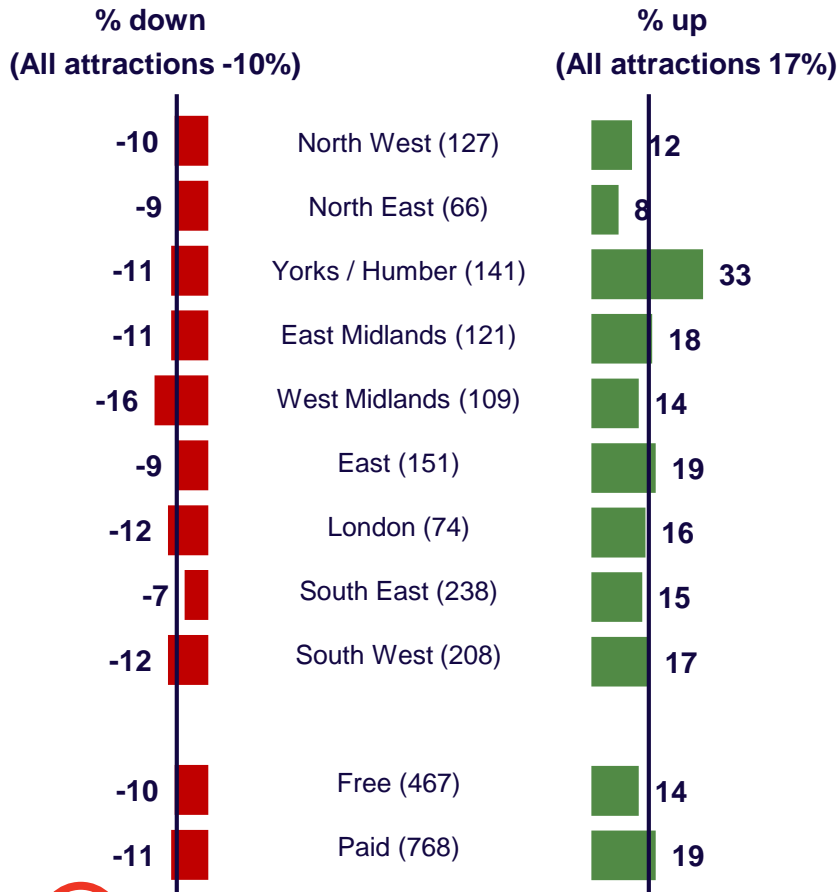
Attractions based in Yorkshire / Humber were the most likely to have increased their marketing expenditure in 2017 (33%), perhaps in an attempt to capitalise on Hull being the UK city of culture in 2017.

The North East and West Midlands were the only areas where net reductions in marketing spend were reported.

Paid attractions (19%) are more likely than free sites (14%) to have increased their marketing spend – a trend that remains consistent with previous years.

Base: All answering marketing question (1,235)

Impact Of Marketing Expenditure: Summary

2016 / 17 change in…	Marketing spend in 2017	
	Up	Down
Total visitor admissions	+6%	+5%
Local visits	+9%	+11%
Overseas visits	+8%	+4%
Gross revenue	+14%	+13%

As seen in previous years, attractions that reported an increase in their marketing spend were more likely to see an increase in their total admissions.

However, the difference in 2017 was far less evident with sites increasing spending only benefiting marginally from doing so, compared against sites that cut spending. For example, visitor admissions increased by 6%, versus 5% of those reducing spend, and gross revenue by 14%, versus 13% of those reducing spend.

With the exponential rise in use of some digital communications, could it be that marketing savings have been made by switching to digital mediums with limited loss in marketing impact?

Other Activities Offered by Attractions

Other Activities Offered: 2016 vs. 2017

It is common for attractions to engage in a range of additional activities to draw in more visitors or supplement their income. 87% offer at least one of those listed below, with the most common being membership schemes (59%), public events (49%) and temporary exhibitions (45%).

There is a downward trend in the proportion of attractions putting on public events. Although not a significant difference, membership and temporary exhibitions seem to feature at more attractions in 2017 than 2016.

The research asked about provision of 'Hosted hobby sessions (e.g. sports, crafts)' for the first time this year, and found that over a fifth of sites offered these in 2017.

	2012 (%)	2015 (%)	2016 (%)	2017 (%)
Membership scheme	56	58	56	59
Public events	57	54	50	49 ↓ Significant decline since 2012
Temporary exhibitions	44	45	41	45
Public venue hire	38	35	36	35
Corporate events	25	30	31	30
Late or unusual opening hours	Not asked	21	29	28
Hosted hobby sessions	Not asked	Not asked	Not asked	21
Multi-attraction pass	Not asked	8	8	8
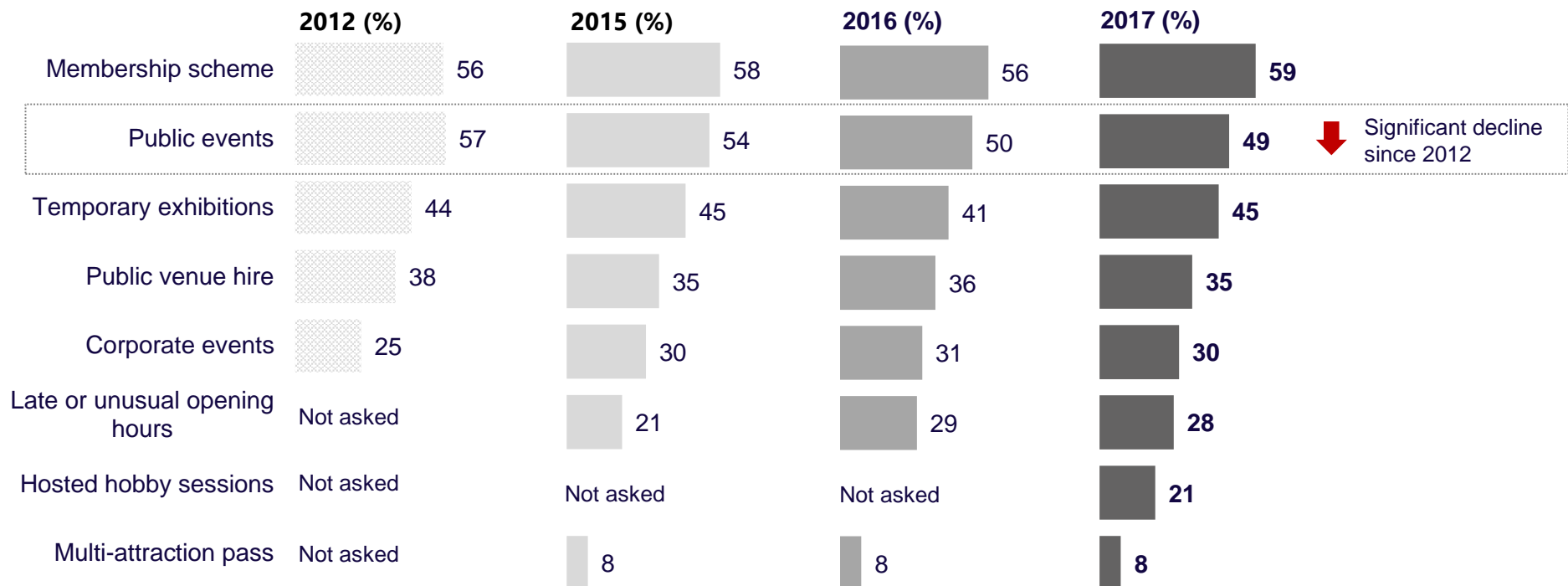
Base: All answering additional activities question (1,279)
N.B: Question not asked in 2013 and 2014

Other Activities Offered by Attractions in 2017

% offered in 2017

Activity	Total	Charging Attractions	Free Attractions
ANY	87	91	81
Membership scheme	59	75	35
Public events	49	47	52
Temporary exhibitions	45	39	54
Public venue hire	35	36	33
Corporate events	30	33	26
Late or unusual opening hours	28	28	27
Hosted hobby sessions	21	19	25
Multi-attraction pass	8	13	1

■ Total ■ Charging Attractions ■ Free Attractions

An extended offer is more common at charging attractions (91%) than free-entry sites (81%) overall, although there are a few activities that are more likely to be offered by free attractions, namely temporary exhibitions, public events and hosted hobby sessions.

Charging attractions are more than twice as likely to operate a membership scheme (an easier sell as they can leverage the value angle of saving on entrance fees).

Where membership is offered by (predominantly) free attractions, this often incorporates free entry into temporary exhibitions that do incur a charge.

54% of sites whose permanent collection is free offer temporary exhibitions. This rises to 66% amongst those that also operate a membership scheme. This relationship is not seen at charging attractions.

Other Activities Offered in 2017: By Attraction Category

At least two thirds of each category engage in one or more of these additional revenue streams. However, the types of activity engaged in vary between category.

For example, temporary exhibitions are more common at museums/ galleries, and visitor/ heritage centres tend to participate in multi-attraction passes, rather than offering membership schemes; visitor/heritage centres are also more likely to host hobby sessions.

It is interesting to note that there are attractions participating in each of these activities/ schemes across almost every category, demonstrating that none of these activities are off limits for any particular attraction category.

Legend:
- ◆ Membership scheme
- ■ Public venue hire
- ▲ Temporary exhibitions
- ◆ Late/ unusual hours
- ▲ Corporate events
- ● Public events
- ■ Multi-attraction pass
- ● Hosted hobby sessions

Category	% ANY
Country Parks* (46)	87%
Farms* (39)	69%
Gardens (65)	91%
Historic Houses / Castles (241)	93%
Other Historic Properties (115)	77%
Leisure / Theme Parks* (30)	87%
Museums / Art Galleries (452)	90%
Steam / Heritage Railways* (35)	97%
Visitor / Heritage Centres (80)	83%
Wildlife Attractions / Zoos (62)	92%
Workplaces* (15)	80%
Places of Worship (51)	82%
Other* (48)	69%
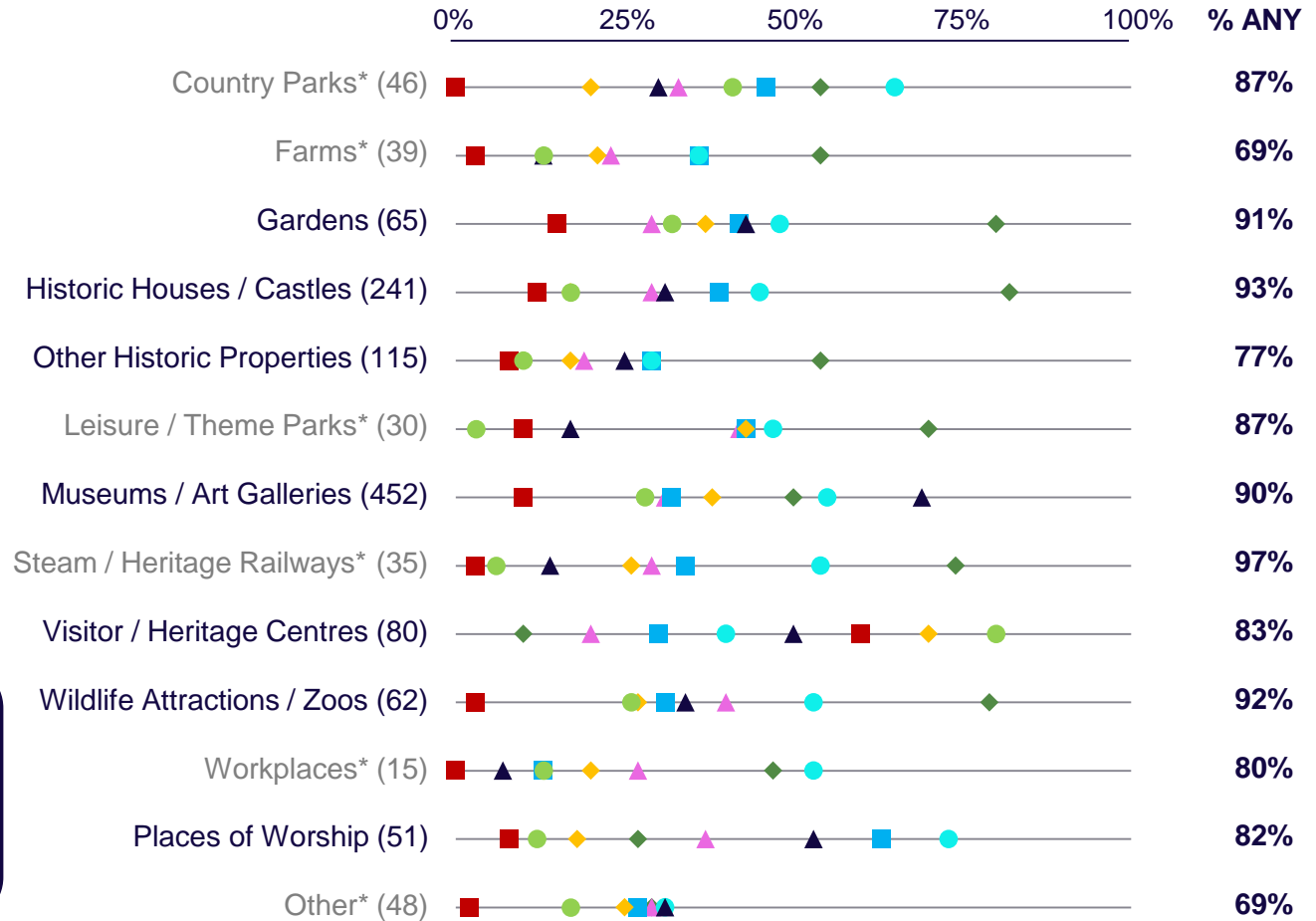
Other Activities Offered by Attractions in 2017: By Visitor Volume

% offering	Visit Volume				
	Under 10k	10k-20k	20k-50k	50k-100k	Over 100k
ANY (2017)	**81**	**87**	**89**	**96**	**94**
Membership scheme	47	56	65	70	72
Public events	37	45	53	48	68
Temporary exhibitions	39	38	47	47	56
Public venue hire	**19**	30	40	41	**54**
Corporate events	**14**	21	35	31	**55**
Late or unusual opening hours	22	23	26	28	42
Hosted hobby sessions	**13**	18	23	25	**34**
Multi-attraction pass	**5**	5	10	9	**14**

Intuitively, the proportion of sites employing each of these income generating activities increases with the size of the site.

This difference is most notable for multi-attraction passes, hosted hobby session, public event hire and corporate events, where attractions with more than 100k visitors a year are around three or four times as likely to offer these activities as those attracting fewer than 10k visitors a year.

Nevertheless, many of these smaller sites (less than 10k visitors a year) are engaging in these activities and nearly half (47%) now offer a membership scheme.

Other Activities Offered by Attractions in 2017: By Region

Membership schemes are common across all regions with over half of attractions offering this for every region except the East Midlands (which is just under at 48%).

London attractions lead the way for most other additional income generating activity, in particular for multi-attraction passes (predominantly the London Pass), public venue hire, corporate events, and 'Lates'.

North West attractions also engage in a wide range of different activities and more sites in this region put on temporary exhibitions than any other (58%)

Region (%)									
% offering	**NW**	**NE**	**Y+H**	**EM**	**WM**	**EAST**	**LON**	**SE**	**SW**
ANY (2017)	**96**	**86**	**87**	**81**	**87**	**86**	**94**	**85**	**86**
Membership schemes	60	67	55	48	65	61	56	57	66
Public events	53	38	51	45	57	50	62	44	46
Temporary exhibitions	**58**	29	50	42	40	42	55	41	43
Public venue hire	40	32	34	36	39	29	**60**	29	33
Corporate events	40	23	30	23	40	28	**55**	25	23
Late or unusual opening hours	37	27	31	14	26	30	**44**	26	24
Hosted hobby sessions	27	14	28	13	27	22	26	20	17
Multi-attraction pass	8	5	11	6	7	4	**38**	7	4

Base: All answering additional activities question (1,279)

Impact of Other Activities: Summary

2016 / 17 change in…	Other activities offered?	
	Yes	No
Gross revenue	+7%	+4%
Proportion of attractions increasing their permanent staffing levels	14%	10%
Proportion of attractions increasing their seasonal staffing levels	10%	12%
Proportion of attractions increasing their unpaid volunteers	22%	12%

Analysis of results in 2016 found that there was a clear relationship between additional activities being offered and changes in all three types of staffing. In 2017, this difference remained for volunteers but was far less evident for paid staff.

The association between offering these activities and revenue remains, with sites engaging in additional activities growing revenue by an average of 7%, compared with only 4% growth amongst those not doing so.

Visitor numbers collected in the survey excluded special events outside normal opening hours and any private hire, so we are unable to assess the impact of these activities as a whole on visitor services.

Employment Trends

Employment Trends

Proportion of attractions employing each type of employees

Permanent staff	86%
Seasonal staff	64%
Unpaid volunteers	85%

Change in employees since 2017

Net (% up minus % down)

% down		% up	
-6	Permanent (1,201)	14	+8
-2	Seasonal (1,146)	10	+8
-5	Unpaid volunteers (1,225)	21	+16

Anticipated change in employees in 2018

% down		% up	
-3	Permanent (1,196)	12	+9
-3	Seasonal (1,131)	8	+5
-2	Unpaid volunteers (1,211)	18	+16

Employment within the attractions sector has remained buoyant, with significantly more sites increasing permanent, seasonal and volunteer staff than those reducing.

Once again the largest growth is seen in unpaid volunteers, with 21% of attractions having increased their staffing in this area, compared with only 5% that have seen a reduction. With 85% of attractions relying on unpaid helpers, and further expansion anticipated in 2018, competition for volunteer time is significant and growing. As such, offering clarity on benefits may be important to recruit and retain volunteers.

Permanent and seasonal staffing levels also grew in 2017, with the net change (% up minus % down) being +8% of sites reporting expansion of both types of staff.

The number of paid staff is anticipated to increase further in 2018, although there are signs this growth may slow for seasonal staff.

Employment Trends: Permanent Employees Summary (2016 - 2017)

% down	2016 to 2017	% up	% any Perm. in 2017
-16	Country Parks* (44)	11	98
-18	Farms* (38)	24	100
-2	Gardens (64)	19	95
-3	Historic Houses / Castles (237)	10	97
-1	Other Historic Properties (110)	13	87
-14	Leisure / Theme Parks* (29)	34	97
-8	Museums / Art Galleries (413)	14	77
0	Steam / Heritage Railways* (33)	15	67
-4	Visitor / Heritage Centres (69)	12	64
-3	Wildlife Attractions / Zoos (59)	19	100
-15	Workplaces* (13)	0	85
-7	Places of Worship* (45)	11	80
-4	Other* (47)	13	89

% down	2016 to 2017	% up	% any Perm. in 2017
-4	Under 20k visits (551)	8	71
-8	20k-50k visits (240)	12	95
-7	50k-200k visits (246)	22	99
-9	Over 200k visits (164)	26	99

% down		% up	% any Perm. in 2017
-9	Free (445)	10	78
-4	Paid (756)	16	90

There has been significant variation in staffing changes across different types of attractions. The net position is highest for leisure/ theme parks (+20) and gardens (+17), while some attraction types saw a net loss in permanent staff numbers, specifically country parks (-5) and workplaces (-15, but note the small base size).

Consistent with previous years, the level of change in staffing increases with the size of the attraction, with large attractions (with over 200k visitors) being the most likely to report increases and decreases in permanent staff).

Base: All answering employment questions (c.1,200)

63

Employment Trends: Permanent Employees Summary (2018 Predictions)

% down	2018 predictions	% up
-11	Country Parks* (45)	20
-8	Farms* (38)	24
0	Gardens (63)	19
-3	Historic Houses / Castles (234)	10
0	Other Historic Properties (111)	6
-4	Leisure / Theme Parks* (28)	29
-5	Museums / Art Galleries (412)	11
-6	Steam / Heritage Railways* (33)	9
0	Visitor / Heritage Centres (67)	18
-3	Wildlife Attractions / Zoos (60)	12
-8	Workplaces* (13)	15
-2	Places of Worship* (44)	9
0	Other* (48)	8

% down	2018 predictions	% up
-2	Under 20k visits (549)	7
-4	20k-50k visits (238)	10
-5	50k-200k visits (246)	20
-5	Over 200k visits (163)	20

Predictions for 2018 are in line with the actual changes seen in 2017, but with fewer sites expecting change. Leisure/ theme parks and gardens are the most bullish following their strong performance in visitor admissions in 2017.

Moderate-large sites (with 50k or more visitors) are more likely to be anticipating staff expansion.

% down		% up
-4	Free (444)	10
-3	Paid (752)	13

Base: All answering employment questions (c.1,200)

Employment Trends: Seasonal Employees Summary (2016 - 2017)

% down	2016 to 2017	% up	% any Seasonal in 2017
0	Country Parks* (44)	16	63
-3	Farms* (37)	24	95
0	Gardens (63)	11	81
-2	Historic Houses / Castles (233)	9	89
-1	Other Historic Properties (108)	9	68
-11	Leisure / Theme Parks* (27)	22	93
-1	Museums / Art Galleries (386)	8	40
0	Steam / Heritage Railways* (32)	16	56
-3	Visitor / Heritage Centres (61)	13	66
-4	Wildlife Attractions / Zoos (57)	12	82
-17	Workplaces* (12)	0	58
-2	Places of Worship* (42)	2	40
-9	Other* (44)	11	77

% down	2016 to 2017	% up	% any Seasonal in 2017
-2	Under 20k visits (521)	6	49
-2	20k-50k visits (233)	7	70
-2	50k-200k visits (234)	15	80
-3	Over 200k visits (158)	22	84

Overall, the increases reported in seasonal staff mirrors that of permanent employees, but fewer sectors report seasonal staff cuts. Cuts are only notable for leisure/ theme parks (where 11% reduced temporary staffing in 2017) and workplaces (-17%, but please note the small base size).

Consistent with permanent staffing, it is the largest attractions (with 200k+ visitors), and those that charge an entrance fee, that are most likely to report change in temporary staff.

% down		% up	% any Seasonal in 2017
-3	Free (414)	7	44
-2	Paid (732)	12	76

Base: All answering employment questions (c.1,200)

Employment Trends: Seasonal Employees Summary (2018 Predictions)

% down	2018 predictions	% up
-4	Country Parks* (45)	3
0	Farms* (36)	17
-2	Gardens (62)	10
-3	Historic Houses / Castles (229)	6
0	Other Historic Properties (108)	5
-7	Leisure / Theme Parks* (27)	30
-3	Museums / Art Galleries (377)	5
-6	Steam / Heritage Railways* (32)	13
0	Visitor / Heritage Centres (61)	18
-9	Wildlife Attractions / Zoos (58)	12
0	Workplaces* (12)	17
-5	Places of Worship* (41)	2
-2	Other* (43)	12

% down		% up
-4	Free (408)	5
-2	Paid (723)	10

% down	2018 predictions	% up
-1	Under 20k visits (511)	5
-3	20k-50k visits (230)	8
-4	50k-200k visits (234)	12
-6	Over 200k visits (156)	13

With the exception of country parks and places of worship, other attraction categories expect to see an increase in seasonal staff in 2018.

Leisure/ theme parks are the most bullish, with 30% anticipating growth in temporary staff (compared with only 7% expecting a reduction). Farms (+17%), visitor/ heritage centres (+18%) and workplaces (+17%) also expect to expand temporary staff, with no sites in these categories planning to cut this staffing.

Charging attractions are more like to increase staffing levels, with twice as many expecting staff numbers to increase, and half as many expecting cuts, compared with free sites.

Once again, larger sites predict greater change in staffing.

Base: All answering employment questions (c.1,200)

Employment Trends: Unpaid Volunteers Summary (2016 - 2017)

% down	2016 to 2017	% up	% any Volunteers in 2017
-2	Country Parks* (43)	28	74
-5	Farms* (37)	8	73
-3	Gardens (59)	15	81
-3	Historic Houses / Castles (231)	16	90
-4	Other Historic Properties (114)	10	79
-4	Leisure / Theme Parks* (27)	0	19
-5	Museums / Art Galleries (432)	28	91
-9	Steam / Heritage Railways* (35)	37	91
-6	Visitor / Heritage Centres (77)	21	87
-3	Wildlife Attractions / Zoos (59)	36	86
-7	Workplaces* (14)	7	57
-4	Places of Worship (51)	16	100
-11	Other* (46)	11	63

% down	2016 to 2017	% up	% any Volunteers in 2017
-3	Under 20k visits (588)	17	87
-9	20k-50k visits (242)	22	86
-4	50k-200k visits (242)	27	87
-2	Over 200k visits (153)	25	75

% down		% up	% any Volunteers in 2017
-4	Free (468)	23	89
-5	Paid (757)	19	83

In line with predictions made last year, use of unpaid volunteers at attractions has continued to grow. However, this growth has lessened for several categories when compared with 2016 – in particular gardens, farms, country parks and steam/ heritage railways.

Use of volunteers is less common at the largest attractions (with over 200k visitors a year), where only 75% benefitted from unpaid helpers in 2017 vs. 87% of small attractions. However, growth of this resource is consistent with medium sized attractions (20-200k visitors a year).

Base: All answering employment questions (c.1,200)

Employment Trends: Unpaid Volunteers Summary (2018 Predictions)

% down	2018 predictions	% up
0	Country Parks* (44)	34
-3	Farms* (36)	19
-2	Gardens (59)	17
-1	Historic Houses / Castles (227)	11
0	Other Historic Properties (113)	8
-13	Leisure / Theme Parks* (24)	4
-2	Museums / Art Galleries (428)	25
-3	Steam / Heritage Railways* (35)	20
-5	Visitor / Heritage Centres (77)	10
-2	Wildlife Attractions / Zoos (60)	35
-7	Workplaces* (14)	14
-2	Places of Worship (50)	16
-2	Other* (44)	11

% down	2018 predictions	% up
-2	Under 20k visits (582)	15
-3	20k-50k visits (238)	19
-3	50k-200k visits (240)	26
-1	Over 200k visits (151)	20

Predictions for changes in unpaid volunteers in 2018 follow a similar pattern to actual changes in 2017 when we look at attraction by size and admission type.

Excepting leisure/ theme parks, other categories expect to be able to recruit volunteers in 2018, but some categories may be concerned about retention, with 13% of leisure/ theme parks, 5% of visitor/ heritage centres and 7% of workplaces (please note low base) anticipating a fall in volunteers in 2018.

% down		% up
-2	Free (461)	20
-2	Paid (750)	17

Base: All answering employment questions (c.1,200)

Appendix

Questionnaire