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Visitor Attraction Trends in England 2021 Full Report

6th September 2022

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1. Background

Acknowledgements

VisitEngland would like to thank all representatives and operators in the attraction sector who provided information for the national survey on which this report is based. For a number of attractions, data has been included with kind permission of ALVA (Association of Leading Visitor Attractions), English Heritage and The National Trust as well as several Destination Management Organisations, councils and museum / attraction groups. Where relevant this has been referenced in the report.

We also extend thanks to Professor Candlin at Birkbeck University who manages the Museums Closures Mapping project, which is referenced in this research.

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Historic England

August 2022

Introduction

This report presents the findings of the Survey of Visits to Visitor Attractions in England undertaken 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.

BVA 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 strong 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 large 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, 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 periodically reviews the attractions listing to refine this in light of the Visitor Attractions Definition. Two changes of note have been made in previous years:

- In 2018 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.
- In 2013 parish churches and small art galleries with a retail focus were removed.

Whilst country parks continue to be included in the survey findings, they are 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 updated in 2021 using Destination Management Organisation updates on attractions in their areas. This data was de-duplicated against the existing attractions database and closed sites were removed. Other sources, such as sector news and Birkbeck University's Museums Mapping database were also used to update the database with attraction openings and closures.

5,947 English visitor attractions were invited to take part in this year's survey.

1369 (23% of) English visitor attractions responded to the survey in 2022, of which 88 sites had either permanently or temporarily closed. Responses were provided as follows:

465 completed online

343 completed by post

561 provided data through umbrella organisations

1,142 sites were open and provided 2021 visitor numbers.

979 attractions were also open and provided 2020 visitor numbers and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response (2)

Visitor numbers in 2021 continued to be affected by the COVID-19 pandemic and associated closure of most attractions during the national lockdown in the first quarter.

To assess the comparability of sample with previous years we have therefore looked at categorisation of sites based on visitor volume from 2019 or before.

Taking this approach we still saw a shift in attraction size in 2020, with fewer sites with 10,000 visitors or less, and this trend has continued in 2021 (21% of sites vs. 29% in 2019). This is because temporary and permanent site closures are most common amongst smaller attractions.

In 2020, we saw a substantial decline in visitor volume and took the decision to base reporting on historical attraction size to give a truer reflection of attraction status. With fewer periods of lockdown in 2021, and an increase in visitor volume, we have reverted to reporting attraction size based on 2021 visitor volume, in line with previous years.

Response by attraction size

Category	No. of attractions giving 2020 & 2021 data	2021 profile of attractions providing data*	2020 profile of attractions providing data*	2019 profile of attractions providing data*
10,000 or less	204	21%	23%	29%
10,001 – 20,000	129	13%	14%	12%
20,001 – 50,000	192	20%	20%	19%
50,001 – 100,000	116	12%	12%	11%
100,001 – 200,000	127	13%	11%	11%
Over 200,000	211	22%	20%	18%
Base size	979	979	984	1152

* Based on sites providing data for the year before as well (e.g. when providing 2021 data, they also provided 2020 data).

Sample & Response (3)

Sample profile for attraction category remains consistent with previous years.

Response by attraction category

Category	No. attractions open and providing data for 2020 & 2021	2021 profile of attractions providing data*	2020 profile of attractions providing data*
Country Parks	31	3%	2%
Farms	20	2%	2%
Gardens	68	7%	6%
Historic Properties	344	35%	37%
Leisure / Theme Parks	15	2%	1%
Museums / Art Galleries	311	32%	34%
Steam / Heritage Railways	21	2%	3%
Visitor / Heritage Centres	51	5%	5%
Wildlife Attractions / Zoos	51	5%	4%
Workplaces	15	2%	1%
Places of Worship	31	3%	3%
Other	21	2%	2%
Base size	979	979	984

See Appendix for examples of attractions falling into each category.

* Based on sites providing data for the year before as well (e.g. when providing 2021 data, they also provided 2020 data).

Note: we are not showing 2019 above as the attraction category profile is in line with both 2020 and 2019.

Sample & Response (4)

Sample profile for region, area type and admission type remains consistent with previous years.

Response by region

Category	No. of attractions giving 2020 & 2021 data	2021 profile of attractions providing data*	2020 profile of attractions providing data*
North West	113	12%	11%
North East	60	6%	6%
Yorks/Humber	87	9%	9%
East Midlands	84	9%	9%
West Midlands	77	8%	9%
East	121	12%	12%
London	68	7%	8%
South East	193	20%	19%
South West	175	18%	16%
Base size	978**	978	984

Response by area type

Category	No. of attractions giving 2020 & 2021 data	2021 profile of attractions providing data*	2020 profile of attractions providing data*
Coastal	127	13%	11%
Rural	494	50%	50%
Urban	358	37%	39%
Base size	979	979	984

Response by admission type

Category	No. of attractions giving 2020 & 2021 data	2021 profile of attractions providing data*	2020 profile of attractions providing data*
Free	310	32%	33%
Paid	669	68%	67%
Base size	979	979	984

* Based on sites providing data for the year before as well (e.g. when providing 2021 data, they also provided 2020 data).

** One attraction group provided group level data for sites across England, which has been included in the trends data, without regional attribution.

Note: we are not showing 2019 above as the attraction category profile is in line with both 2020 and 2019.



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2. Headlines

2021 Visitor Attraction Trends

Attractions in England reported a 30% increase in total visits from 2020 to 2021, as they began to recover from the impact of the COVID-19 pandemic, but this still remains at less than half of the admissions volume seen in 2019.



+11%

Adult admission fees increased significantly in 2021 as sites sought to balance income against lower admissions.



+92%

Partially driven by this increase in visits and the admission price rise, sites reported a substantial boost to **gross revenue** in 2021, compared with 2020.

Admissions volume for participating attractions

(2020 and 2021 visitor volume was provided through the survey; 2019 visitor volume is an estimation based on the sector trend recorded in 2020)

	2019	2020	2021
Number of visits	244.14 million	85.45 million	111.08 million

	2019 to 2020	2020 to 2021	2019 to 2021
Annual change in number of visits	-65%	+30%	-55%

Headlines: Attraction Opening & Capacity Management

The COVID-19 pandemic continued to affect the attractions sector throughout 2021. However, with longer to plan and relaxed restrictions, the proportion of sites reporting that they had to remain closed for the whole year reduced from 10% in 2020 to 6% in 2021.

Free sites continue to be more severely affected than sites that charge an entrance fee, with 9% of free sites reporting that they were unable to open during 2021, compared with 4% of sites charging an entrance fee.

Three in ten (29%) of the remaining attractions were unable to open for their typical visitor seasons once the national lockdown was lifted – only a small improvement on 2020 (36%). In 2021, 9% of sites were unable to meet COVID safety requirements, 7% reduced their season because it was not profitable to open and a further 7% because of insufficient staff/ volunteers.

In order to meet required health and safety standards, many sites continued at a reduced visitor capacity in 2021. **The average reduction was to 71% of 2019 maximum capacity - an increase of 22% compared with 2020 maximum capacity levels.**

The sector approach to ticketing was more relaxed in 2021, with only 11% enforcing pre-booking (down from 27% in 2020). Instead we saw encouragement of pre-booking, whilst allowing walk-ups (49%).



Headlines: Visit Volume

Overall, attractions in England reported a **30% annual increase in total visits from 2020 to 2021**, following the sharp decline of 65% in 2020.

This increase was driven by the domestic market. Local/ day trip visit volume saw an increase of 26%, and an increase in staycations also benefited some regions.

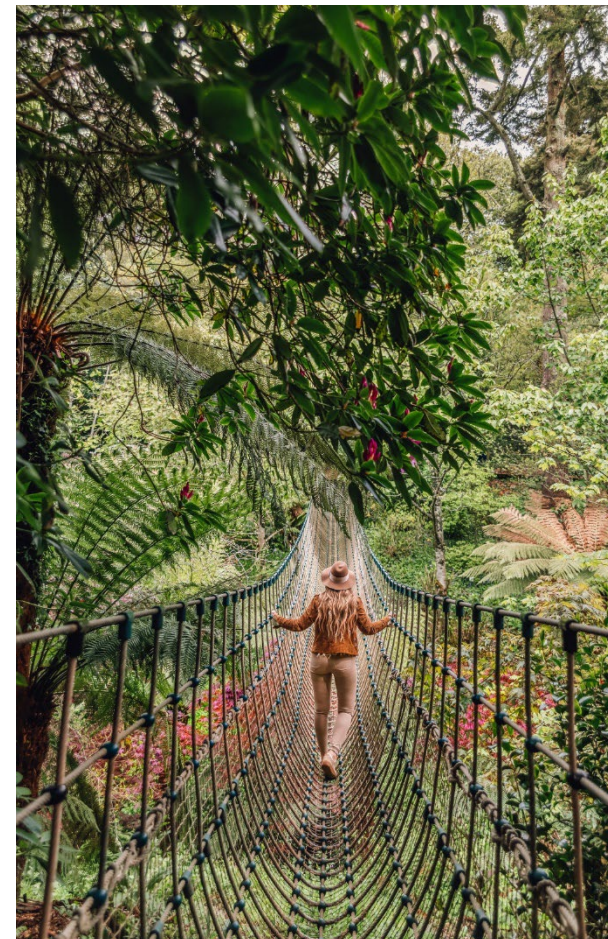
Inbound travel to the UK reduced further in 2021 (according to the International Passenger Survey) and this had a direct impact on the volume of overseas visitors to English attractions with a 39% decrease reported, compounding a significant fall in 2020.

With greater reliance on international tourism than other areas, **London was hit hardest by the COVID-19 pandemic and is recovering more slowly**, with visitor volume increasing by just 12%.

All attraction categories saw an increase in visits in 2021, but the level of growth varied substantially across different categories. Museums/ art galleries made up least ground, with an increase of just 18% following an average fall in visitor volume of 76% in 2020.

The volume of children visiting attractions increased by 41% from 2020 to 2021 – a larger increase than overall visit volume (30%). As such sites that attracted more family visitors performed better than more adult focused attractions.

However, schools have been slower to return, with schoolchildren visits only increasing by 6% compared with 2020 following the steep decline of 84% in 2020.



Headlines: Revenue, Admission Pricing & Funding

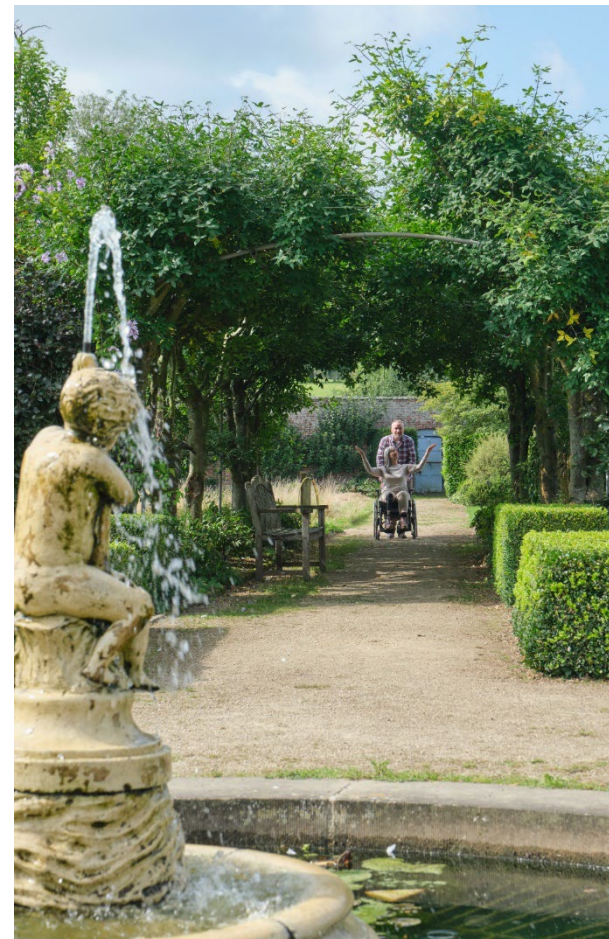
Adult and child admission fees both increased by 11% in 2021, which far exceeds the inflationary trend of 4-6% seen before 2020. However, the average reduction in entrance fees in 2020 means that adult prices are still lower than they would have been, had the previous inflationary trend continued.

The average adult (high season) admission price increased to £10 - the highest we have seen to date - and average child entry to £6.15.

Entrance price increases helped to boost the average gross revenue at visitor attractions, which increased by 92% in 2021, regaining some of the ground lost in 2020.

This increase is larger than that seen in visitor admissions (30%), explained by higher entrance prices, use of funding and expansion of commercial operations during the pandemic.

68% of all attractions sought additional funding during 2021, of which two thirds successfully secured the full amount they needed. The most popular sources of funding were government funding, peer to peer lending and community shares, with 73%, 66% and 53% respectively having used these types of funds in the past.



Headlines: Marketing & Digital Communication

Marketing expenditure increased in 2021, with 43% of attractions reporting an increase in their budgets. Paid attractions were almost twice as likely to increase their marketing expenditure than free attractions.

Use of social media is now almost universal amongst attractions with more than 10,000 visitors (98%), and 86% of smaller attractions have followed suit in using one or more social media platform, or mobile apps.

Facebook (89%) continues to dominate but its penetration as a tool for attractions has plateaued, and while Twitter is still used by 61% of attractions this is a decline of -6% compared with 2019.

Use of Instagram/ Pinterest and ‘other’ social media continues to rise. 31% used ‘other’ social media, an 11% increase on 2019, while the 62% using Instagram/ Pinterest is a 5% rise across the same period.

Provision of paid online content (such as online learning and tours), remained fairly niche, even amongst paid attractions.

However, analysis of the data shows that provision of free content had more impact on revenue than paid content – most likely because this reached more people – so it would be advisable for sites to focus on provision of free content where resource will not stretch to both.



Headlines: Employment

In the first half of 2022 when this research was undertaken, two thirds of visitor attractions were back to pre-pandemic staffing levels.

The situation is most extreme in London (where growth of visitor volume has been slowest) with only 58% of London sites back to pre-pandemic levels.

Leisure/ theme parks and farms have been the most reactive to the pandemic in terms of staffing, with reductions in 2020 followed by recruitment drives in 2021.

Levels of permanent staffing in 2021 remained fairly consistent with 2020. However, more sites reported an increase in seasonal staff than a decrease, suggesting some increased reliance on this temporary staffing resource.

Use of unpaid volunteers fell from 87% of sites in 2019 to 77% in 2021 – in most cases this is likely to be due to volunteer programmes being put on hold to protect volunteer safety, or due to lack of availability.

Looking ahead to 2022, attractions expect an expansion in staff teams, in particular the use of unpaid volunteers, but this expectation is less bullish than it was in 2020.



Headlines: Access & Sustainability

A fifth of attractions in England are difficult to reach via public transport, with little progress made since 2019.

55% of all attractions are supported by frequent trains/ buses but these do not always stop at the attraction entrance. Buses/ trains only stop near the entrance of 35% of all attractions, so for the remaining sites, it is important to consider the onward journey for visitors with mobility needs.

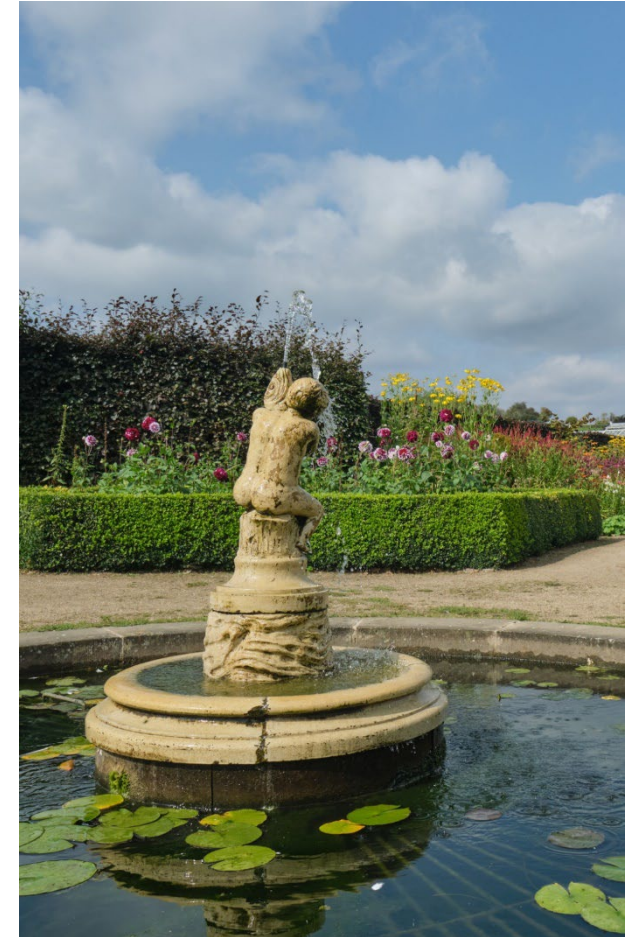
This challenge is most evident in rural areas, where only 66% of sites can be reached via public transport.

Over half of English attractions (56%) have an environmental strategy, and 35% have a budget in place to help meet their objectives.

Most attractions have taken some action on sustainability, regardless of whether or not they have a formal strategy in place. The most common sustainability practices are switching to LED lightbulbs (76%) and adjusting heating/cooling options (50%). Other sustainable practices are just emerging, such as provision of electric charging points on site (with only 9% of sites doing so at the time of the research).

As we might expect, larger attractions have generally taken more action than smaller ones, in particular when it comes to installation of renewable energy (Over 100k visits a year: 41%, under 20k visits: 14%) and provision of electric charging points (Over 100k visits a year: 25%, under 20k visits: 4%).

Over a fifth of attractions offer means for visitors to learn about sustainability through their exhibitions and signposting, with large attractions attracting over 100k visits a year particularly likely to do so (46%).





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3. Context

2021 Context: Weather Summary

Overall 2021 had fairly typical weather patterns, but there are a few weather events worth noting.

The year started with a particularly cold spell in January and early February, and the weather was wetter than average.

Spring overall was cooler, but sunnier, than average. April was notably dry and sunny, particularly in the North West, but also slightly cooler than usual. April was the second sunniest on record, only beaten by April 2020. Showers waited until May, which was a very wet month, particularly in the South West and Yorkshire.

Overall, England saw a wetter and duller summer than average. Storm Evert, the UK's first named storm to occur in July, brought heavy rain and strong winds to the South and this was followed by a dull and unsettled August.

Autumn was warm compared with historical data, but there was an exceptionally wet spell of weather in late October, and Storm Arwen in November saw the Met Office issue a Red Weather Warning due to high winds.

December was a fairly dull month, with rainfall totals close to the average for the time of year.



2021 Context: COVID-19

England started 2021 with a third national lockdown with most visitor attractions required to close until mid-April, and legal limits on social contact not fully removed until 19th July.

Overseas visitors to the UK declined for a second year, due to the travel restrictions and reduced appetite for travel associated with COVID. Top visiting countries were the USA, Republic of Ireland and France.

However, travel overseas by UK residents was also down.

Overseas residents made 6.4 million visits to the UK in 2021; this was 43% lower than in 2020, when travel for most of Q1 was unaffected by the COVID-19 pandemic.

Overseas residents spent £5.6 billion on their visits to the UK in 2021, which was 9% less than in 2020.

UK residents made 19.1 million visits abroad in 2021. This was a fall of 20% compared with the previous year, due to continued travel restrictions.

The average length of stay for both overseas residents' and UK residents' visits was much longer than in previous years and resulted in a higher spend per visit.

Key dates for visitor attractions:

- 6/1** Third national lockdown begins
- 15/2** Hotel quarantine for travellers arriving in England from 33 high-risk countries begins
- 8/3** Schools in England reopen
Recreation in outdoor public spaces allowed between 2 people
- 29/3** 'Stay at home' order ends, but people encouraged to stay local.
Outdoor gatherings of 6 people or 2 households allowed
- 12/4** Visitor attractions allowed to reopen
Social contact rules continue – no indoor mixing between different households
- 17/5** Limit of 30 people allowed to mix outdoors
Indoor gatherings of 6 people or 2 households allowed
- 19/7** Most legal limits on social contact removed
- 30/9** Furlough/ job retention scheme ended
- 10/12** Face masks compulsory in most public indoor venues due to Omicron variant



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4. Impact of COVID-19

Full Closure in 2021: By Attraction Category

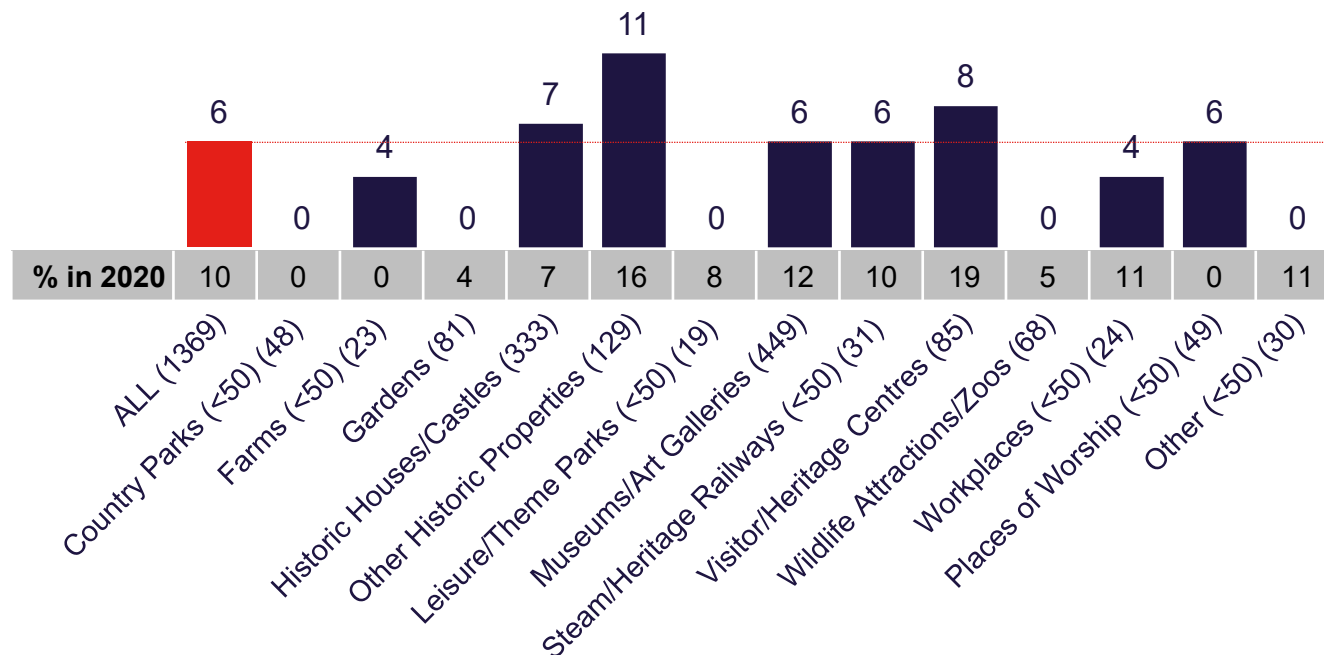
The COVID-19 pandemic continued to affect the attractions sector throughout 2021. However, with longer to plan and relaxed restrictions, the proportion of sites reporting that they were unable to open at all during the year reduced from 10% in 2020 to 6% in 2021.

The actual closure percentage may be higher than this as we believe that sites which have remained closed into 2021 are less likely to have responded to the survey.

Some attraction categories clearly fared better than others. There were no reported closures for many outdoor attraction categories (gardens, country parks, wildlife attractions and leisure/theme parks).

Indoor attractions saw more closures, in particular historical properties where modifications to the visitor experience to comply with COVID safety requirements may have been more difficult.

% of attractions closed throughout 2021, by category



Base: All attractions responding to the survey (1369)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

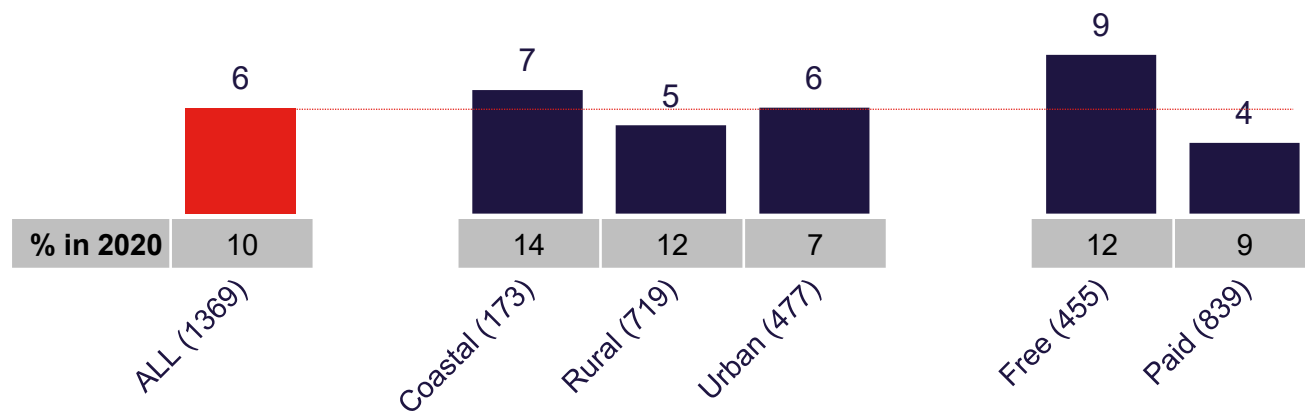
(<50) Base size below 50 (please treat with caution)

Full Closure in 2021: By Area Type and Admission Charge

Free sites continue to be more severely affected than sites that charge an entrance fee, with 9% of free sites reporting that they were unable to open during 2021, compared with 4% of sites charging an entrance fee.

However, there was less variation in attraction opening by area type in 2021.

% of attractions closed throughout 2021, by category



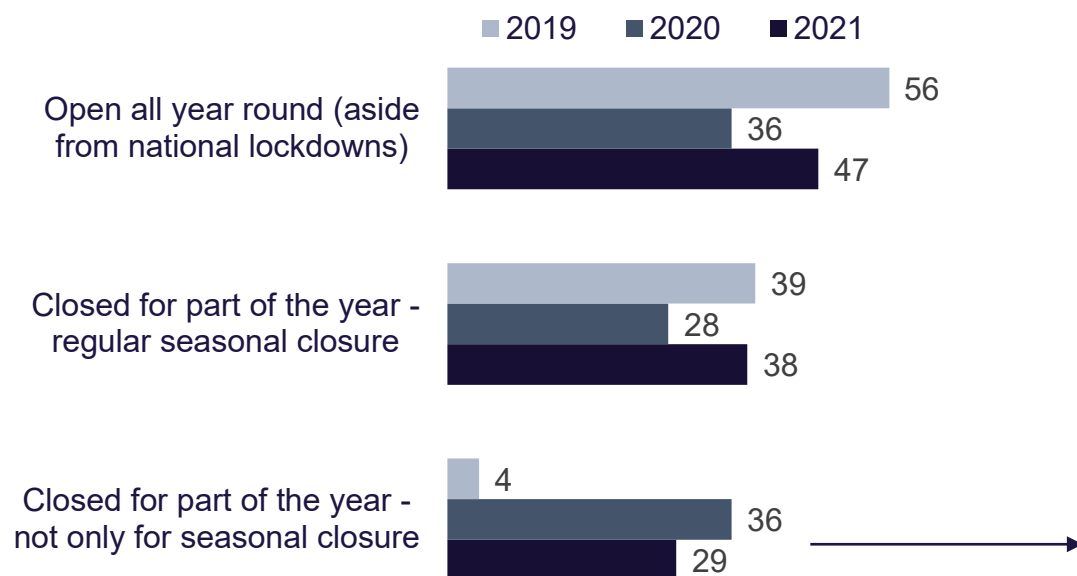
Base: All attractions responding to the survey (1369)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Partial Closure in 2021

COVID related closure continued into 2021, with 9% of sites unable to meet COVID safety requirements, 7% because it was not profitable to open and a further 7% because of insufficient staff/ volunteers. However, this was an improvement compared with 2020, with sites being more prepared and the relaxation of COVID related opening requirements.

% sites closed for specific reason aside from National Lockdowns



Closure due to...	2021 [%]	2020 [%]
Regional lockdown	N/A	29
Unable to meet COVID requirements on site	9	17
Not profitable to open	7	7
Insufficient staff/ volunteers	7	6
Any refurbishment/ repairs	11	7
Planned refurbishment/ repairs	9	Not asked
Refurbishment/ repairs brought forward due to COVID	2	Not asked
Other reason	5	6

Base: All attractions answering closures question (2021: 916, 2020: 865, 2019: 973)
Breakdown of 'other' reasons not asked in 2019.

Partial Closure in 2021: By Attraction Category

Some attraction categories continue to be hit worse than others, due to insufficient staff/ volunteers or challenges in making the site COVID safe making it difficult or unprofitable to open. Those worst hit in 2021 were steam/heritage railways, leisure/theme parks, and visitor/heritage centres.

% sites open and reasons for closure, by attraction category

2021 closure due to... [%]	ALL (916)	Country Park (<50) (22)	Farms (<50) (21)	Garden (<50) (45)	Historic House/ Castle (179)	Other Historic (96)	Leisure/ Theme Park (<50) (17)	Museum s/ Art Galleries (326)	Steam/ Heritage Railway (<50) (29)	Visitor/ Heritage Centre (61)	Wildlife attraction/ Zoos (52)	Workplaces (<50) (15)	Place of Worship (<50) (34)	Other (<50) (19)
Open year round (aside from national lockdowns)	47	68	76	47	44	42	35	43	17	38	75	47	76	63
Regular seasonal closure	38	23	19	49	42	43	59	37	79	39	12	40	12	32
Planned refurbishment/ repairs	9	5	5	2	7	13	12	10	24	15	8	0	6	11
Not profitable to open	7	0	5	0	4	8	12	9	14	3	4	13	3	11
Refurbishment/ repairs brought due to COVID	2	0	0	2	1	0	0	2	0	3	2	0	6	0
Difficulties making site COVID safe	9	0	5	0	9	13	0	10	10	15	2	13	3	5
Insufficient staff/volunteers	7	5	0	0	2	3	12	12	14	13	2	7	9	5
Other reasons	5	5	5	2	5	2	12	6	3	10	10	0	0	5

(<50) Base size below 50 (please treat with caution)

Base: All attractions answering closures question (916)

Partial Closure in 2021: By Area Type, Admission Charge and Attraction Size

Smaller, free sites were most likely to struggle to meet the safety, staffing and profitability levels required to open.

% sites open and reasons for closure, by area type, by admission charge and by attraction size

2021 closure due to... [%]	ALL (916)	Coastal (133)	Rural (478)	Urban (305)	Free (346)	Paid (567)	10,000 or less (368)	10,001 - 20,000 (115)	20K-100K (208)	Over 100K (148)
Open year round (aside from national lockdowns)	47	51	41	54	46	47	32	51	66	70
Regular seasonal closure	38	36	47	24	32	42	52	37	27	18
Planned refurbishment/ repairs	9	11	10	9	12	8	10	6	7	6
Not profitable to open	7	6	6	8	10	5	8	5	7	5
Refurbishment/ repairs brought due to COVID	2	2	2	1	2	2	1	3	1	1
Difficulties making site COVID safe	9	9	10	6	12	7	13	5	1	*
Insufficient staff/volunteers	7	8	7	7	13	4	13	2	3	3
Other reasons	5	5	5	6	7	5	5	4	3	7

Maximum Capacity: By Attraction Category

In order to meet required health and safety standards, many sites had to reduce their maximum visitor capacity. The average reduction was to 71% of 2019 maximum capacity – an increase of 22% compared with 2020.

As we would expect, capacity was highest at sites where a significant proportion of their visitor provision is outdoors, in particular historic houses/ castles (81%), gardens (80%) and wildlife attractions (80%).

Although there are some benefits to reduced capacity in terms of the visitor experience, 95% of attractions intend to increase capacity back to 2019 levels when it is safe to do so.

Capacity limits as a proportion of 2019 maximum capacity, amongst sites needing to actively manage capacity

	Maximum capacity <u>during 2021</u> as a % of the maximum capacity in 2019 [Mean]	Maximum capacity <u>by end of 2020</u> , as a % of the maximum capacity in 2019 [Mean]
Total Average (609)	71	49
Country Parks (13) ^(<50)	75	(<10)
Farms (16) ^(<50)	73	56
Gardens (24) ^(<50)	80	70
Historic Houses/Castles (146)	81	54
Other Historic Properties (83)	75	55
Leisure/Theme Parks (11) ^(<50)	79	(<10)
Museums/Art Galleries (181)	60	43
Steam/Heritage Railways (20) ^(<50)	73	43
Visitor/Heritage Centres (35) ^(<50)	66	45
Wildlife Attractions/Zoos (31) ^(<50)	80	51
Workplaces (11) ^(<50)	64	(<10)
Places of Worship (24) ^(<50)	66	30
Other (14) ^(<50)	65	(<10)

Base: All attractions who needed to actively manage their capacity and answered the maximum capacity question (609)

^(<50) Base size below 50 (please treat with caution)

^(<10) Base size below 10, figure not reported

Maximum Capacity: By Area Type, Admission Charge and Attraction Size

While capacity increased across all types of attractions, free, urban and small attractions (with less than 10,000 visitors a year) operated at lower levels in 2021 – below two thirds of 2019 capacity.

Capacity limits as a proportion of 2019 maximum capacity, amongst sites needing to actively manage capacity

	Maximum capacity <u>during 2021</u> as a % of the maximum capacity in 2019 [Mean]	Maximum capacity <u>by end of 2020</u> , as a % of the maximum capacity in 2019 [Mean]
Total Average (609)	71	49
Coastal (80)	74	52
Rural (332)	75	54
Urban (197)	64	54
Free attractions (218)	64	42
Paid attractions (387)	75	52
10,000 or less (216)	62	49
10,001 - 20,000 (74)	75	53
20K-100K (129)	80	48
Over 100K (101)	75	47

Base: All attractions who needed to actively manage their capacity and answered the opening capacity question (545) and maximum capacity question (609)

Introduction of Booking Systems

The development of online booking systems was prioritised by many attractions during the pandemic.

36% of attractions setup online booking across 2020 and 2021, taking the total proportion of attractions with a booking system to 62% by the end of 2021.

This increases to 78% amongst paid attractions and over a third of free attractions now offer the option to book online.

% of sites with an online booking system

	%	ALL (782)	Free (393)	Paid (489)
Yes – introduced in 2021		7	3	10
Yes – introduced in 2020		29	13	39
Yes – introduced in 2019 or before		26	18	30
No online booking system		38	66	22

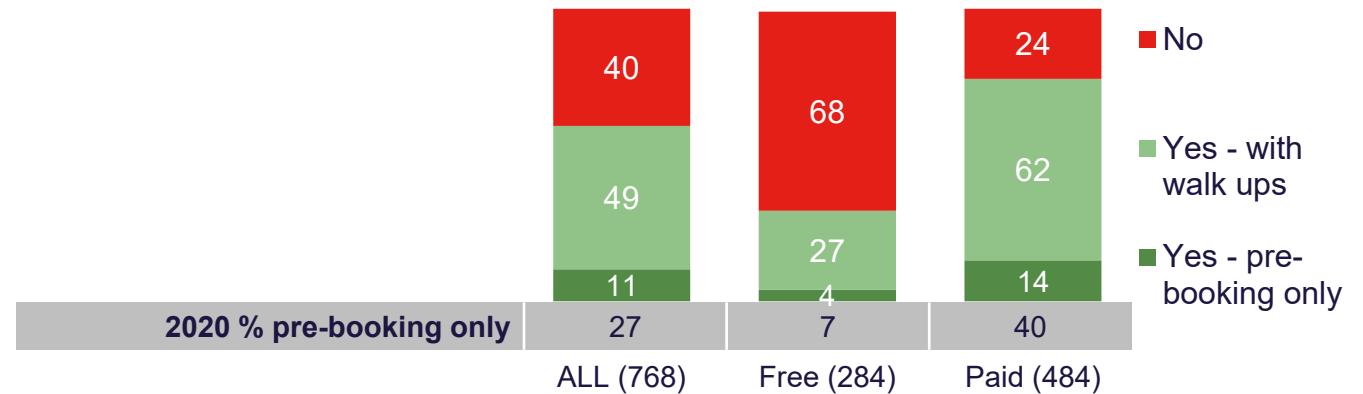
Pre-booking requirement

Only 11% enforced the need to pre-book tickets in 2021, down from 27% in 2020. Instead we saw more sites move towards a policy of encouraging pre-booking.

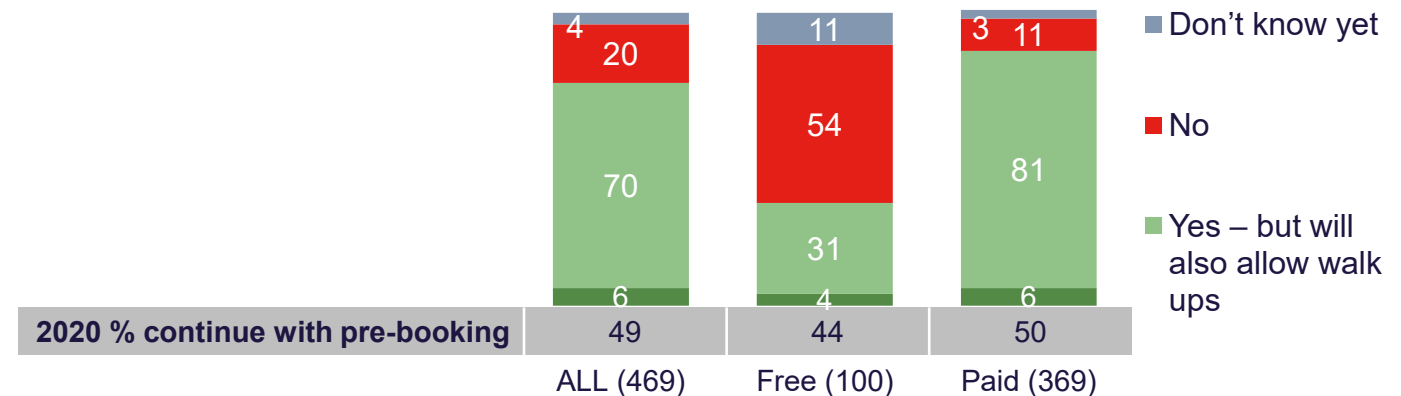
Free attractions were more flexible in their approach with only 31% encouraging pre-booking, compared with over three quarters (76%) of paid sites.

Attractions have clearly valued the operational and marketing benefits afforded by pre-booking, and the majority (76%) of those using online booking systems intend to continue with this.

% of sites requiring visitors to pre-book visits during 2021



% intending to continue to require pre-booking



Base: All attractions answering Pre-booking question (736)

Base: All attractions with an online booking system who answered the pre-booking continuation question (403)



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5. Visitor admission trends

Overall Visitor Admission Trends

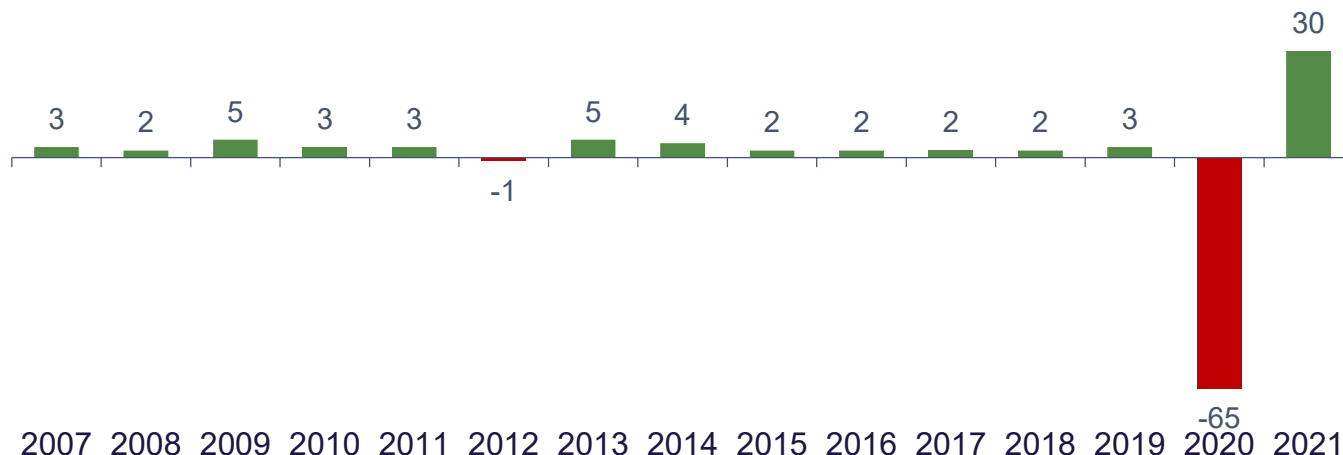
Overall, attractions in England reported a 30% annual increase in total visits from 2020 to 2021, following the sharp decline of -65% in 2020 caused by the COVID-19 pandemic.

However, this still remains at less than half of the actual admissions volume seen in 2019.

According to the International Passenger Survey, overseas visitors to the UK declined further in 2021 due to the travel restrictions and reduced appetite for travel associated with COVID. So this increase was driven by the domestic market.

VisitEngland's COVID-19 consumer sentiment tracker found that 88% of UK adults had received at least two doses of the COVID-19 vaccine by the end of 2021, and comfort levels in engaging with activities away from home increased substantially throughout the year of 2021.

Annual % change in visits



Admissions volume for participating attractions

(2020 and 2021 visitor volume was provided through the survey; 2019 visitor volume is an estimation based on the sector trend recorded in 2020)

	2019	2020	2021
No. of visits	244.14 million	85.45 million	111.08 million

Visitor Admission Trends 2021: By Attraction Category

All attraction categories showed an increase in admissions in 2021, but this ranged from 1% at country parks (which was the most resilient category in 2020), to an 118% increase for steam/ heritage railways.

Museums/ art galleries made up least ground, with an increase of just 18% following an average fall in visitor volume of 76% in 2020.

Visitor admission trends: By Attraction Category

	2020/21 change [%]	2019/20 change [%]
Total Average	+30	-65
Country Parks (31) ^{<50}	+1	-7
Farms (20) ^{<50}	+58	-50
Gardens (68)	+40	-40
Historic Houses/Castles (266)	+46	-57
Other Historic Properties (78)	+57	-74
Leisure/Theme Parks (15) ^{<50}	+47	(<10)
Museums/Art Galleries (311)	+18	-76
Steam/Heritage Railways (21) ^{<50}	+118	-55
Visitor/Heritage Centre (51)	+46	-66
Wildlife Attractions/Zoos (51)	+32	-41
Workplaces (15) ^{<50}	+51	-56
Places of Worship (31) ^{<50}	+49	-73
Other (21) ^{<50}	+35	-82

^{<10} Base size below 10 (please treat with caution)

^{<50} Base size below 50 (please treat with caution)

* % change is under 1%, therefore not shown

Base: All attractions providing visits data for current and previous year (979)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Index of Visits to Attractions: Calculation

The charts presented on slides 35 and 36 show the **indexed visits trend** for each attraction category. The **base year for the index is 1989, 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.



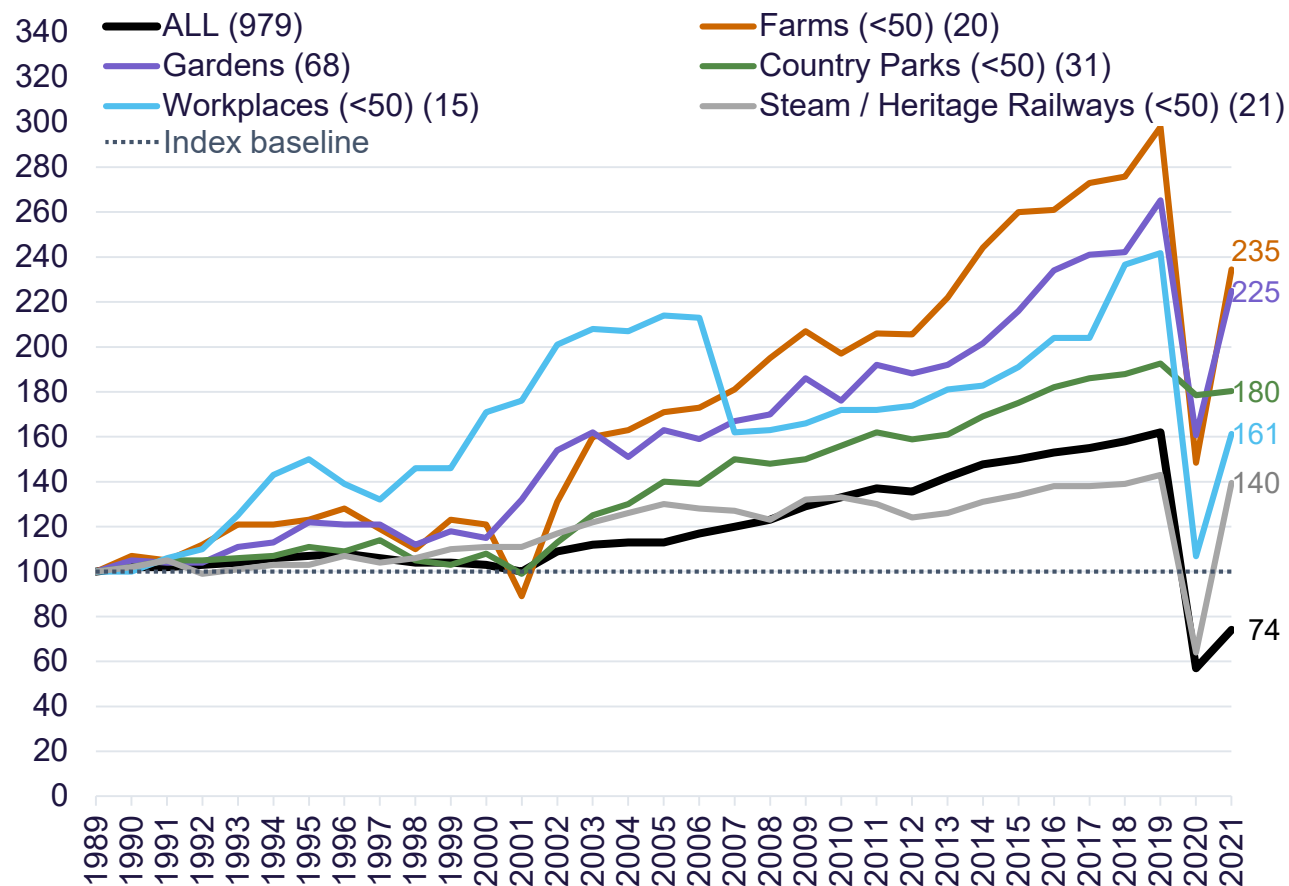
Index of Visits to Attractions: Best Performing Sectors over the long term

This chart illustrates the best performing attraction categories over the long term.

Across England, attractions as a whole ('all' visits) increased by 62% in the thirty years to 2019 (index of 162), followed by a substantial drop to an index of 57 in 2020. The 2021 increase in visitor volume helped to regain ground, but the sector average remains below the 1989 baseline, at 74.

Only two attraction categories operated at near pre-pandemic levels in 2021; these are country parks which saw a minimal decline in 2020, and steam/heritage railways which made a remarkable recovery in 2021.

However, farms, gardens and workplaces have also bounced back and sit comfortably above the 1989 benchmark (with indexes of +235 for farms, +225 for gardens and +161 for workplaces).



Base: All attractions providing visits data for current and previous year (979)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

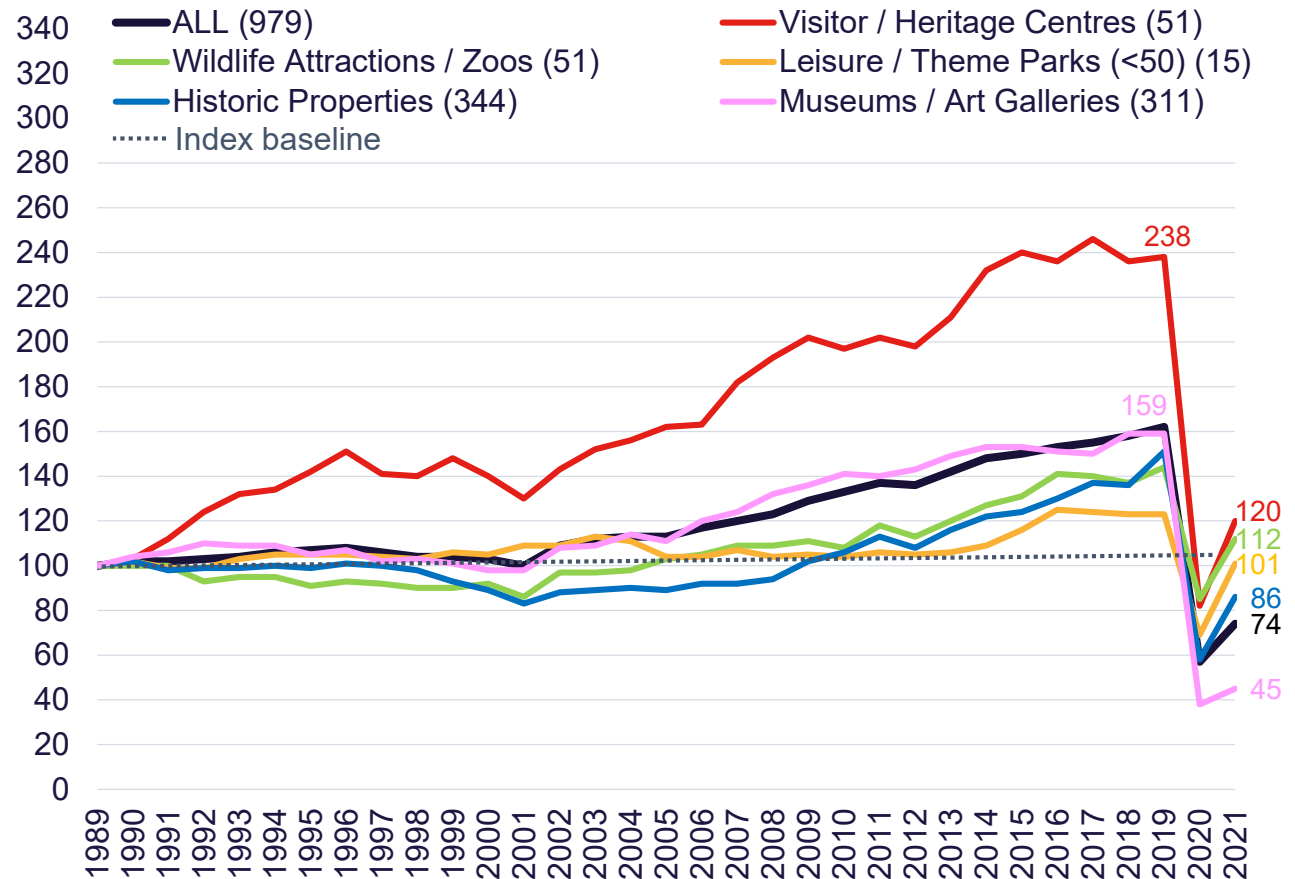
Index of Visits to Attractions: Other Sectors performance over the long term

This chart illustrates the attraction categories which have performed less well over the long term.

Museums & galleries saw a big decline in admissions in 2020 and are recovering more slowly than other categories: a year on volume is only 28% of 2019 levels and the index is still less than half of the 1989 benchmark (at +45).

Historic properties are also seeing fewer visitors than when the benchmark began (with an index of +86).

Visitor/ heritage centres was the forth best performing category in 2019, but has now fallen back to sixth, with visitor volume half of what it was in 2019.



Base: All attractions providing visits data for current and previous year (979)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Visitor Admission Trends 2021: By Region

There is substantial regional variation in performance, with popular rural and coastal tourist destinations benefiting from ‘staycations’, while areas more reliant on international tourism struggled more.

The North West performed best with an uplift in visitor volume of 57%. The region suffered a large fall in visitor volume associated with regional lockdowns in 2020, so this was at least in part due to the larger increase in opening days compared with some other regions.

The South West also fared well, with a 52% increase in admissions, benefiting from staycations.

With greater reliance on international tourism than other areas, London was hit hardest by the COVID-19 pandemic and is recovering more slowly, with visitor volume increasing by just 12%. Ongoing concerns about using public transport* will have also affected site visits to London, and the rest of the South East, which reported a below average increase of 17%.

Visitor Admission Trends 2021: By Region

	2020/2021 change [%]	2019/2020 change [%]
Total Average	+30	-65
North West (113)	+57	-62
North East (59)	+45	-68
Yorks/Humber (87)	+45	-54
East Midlands (82)	+22	-50
West Midlands (78)	+30	-53
East (121)	+29	-40
London (68)	+12	-77
South East (193)	+17	-58
South West (174)	+52	-60

Base: All attractions providing visits data for current and previous year (979)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.
 *VisitBritain Domestic Sentiment Tracker – only 51% felt confident in taking public transport in Dec 2021.

* Based on Transport for London’s public transport journeys data.

Visitor Admission Trends 2021: By Admission Charge, Area Type & Attraction Size

The sites that saw the largest declines in 2020 were free attractions and attractions based in urban areas, and these are also reporting the slowest recovery in 2021.

Sites charging an entrance fee reported a 37% increase in visitor volume in 2021, compared with just 19% for free attractions.

Urban areas saw the slowest growth, with a 23% increase, while coastal areas fared best with growth of 47%.

Many of England's largest attractions (with 200,000+ visitors per annum) are the free national museums, based in urban centres, and so this category also reported below average increase in visitor volume.

Visitor Admission Trends 2021: By Admission Charge, Area Type & Size

	2020/2021 change [%]	2019/2020 change [%]
Total Average	+30	-65
Free (310)	+19	-71
Paid (668)	+37	-60
Coastal (127)	+47	-59
Rural (493)	+30	-47
Urban (359)	+23	-74
20,000 visits or less (495)	+36	-68
20,001 – 50,000 visits (157)	+56	-66
50,001 – 200,000 visits (221)	+39	-58
Over 200,000 visits (142)	+26	-66

Visitor Admission Trends 2021 Among Free Attractions and Among Paid Attractions

The chart below shows the changes by category, split by free and paid attractions.

Visitor Admission Trends 2021: Free Attractions

Free Attractions	2020/21 change [%]	2019/20 change [%]
ALL FREE (310)	+19	-71
Country Parks (18) <50	+3	*
Farms <10	(<10)	(<10)
Gardens <10	(<10)	(<10)
Historic Houses/Castles (13) <50	+35	-78
Other Historic Properties (12) <50	+27	-44
Leisure/Theme Parks <10	(<10)	(<10)
Museum/Art Galleries (187)	+11	-76
Steam/Heritage Railways <10	(<10)	(<10)
Visitor/Heritage Centres (25) <50	+53	-55
Wildlife Attractions/Zoos <10	(<10)	(<10)
Workplaces <10	(<10)	(<10)
Places of Worship (24) <50	+59	-62
Other (<10)	(<10)	(<10)

Visitor Admission Trends 2021: Paid Attractions

Paid Attractions	2020/21 change [%]	2019/20 change [%]
ALL PAID (668)	+37	-60
Country Parks (13) <50	*	(<10)
Farms (15) <50	+49	-49
Gardens (65)	+40	-39
Historic Houses/Castles (252)	+47	-55
Other Historic Properties (66)	+65	-74
Leisure/Theme Parks (13) <50	+43	(<10)
Museum/Art Galleries (124)	+54	-76
Steam/Heritage Railways (19) <50	+120	-54
Visitor/Heritage Centres (26) <50	+41	-72
Wildlife Attractions/Zoos (43) <50	+33	-44
Workplaces (11) <50	+49	(<10)
Places of Worship <10	(<10)	(<10)
Other (14) <50	+75	-82

* %change is under 1%, therefore not shown

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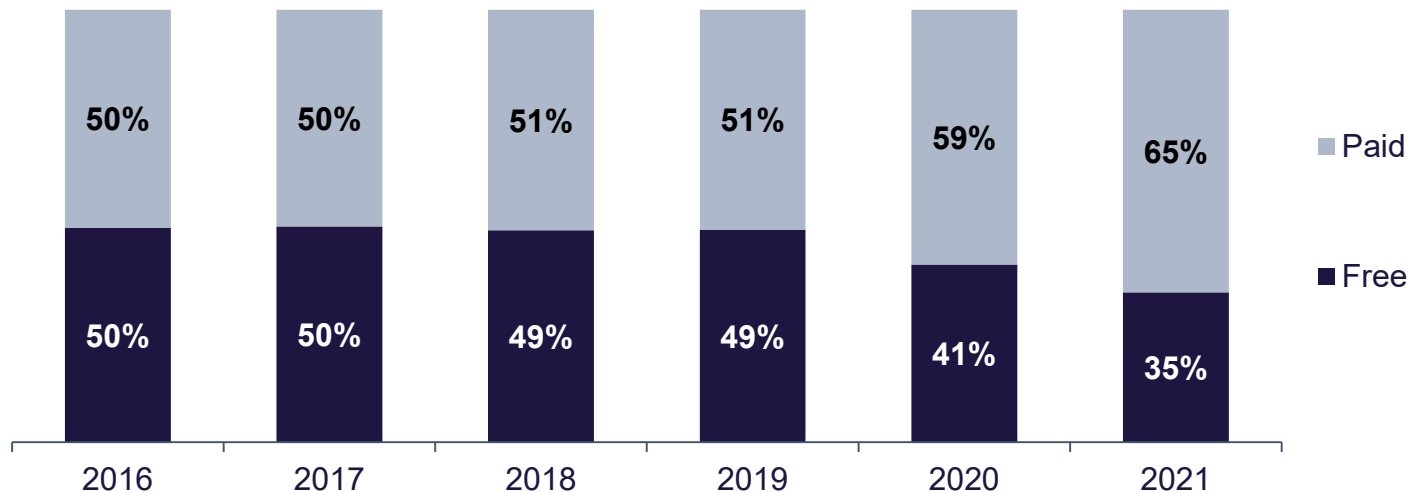
Base: All attractions providing visits data for current and previous year Paid (668) Free (310)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Trend in Visits to Paid & Free Attractions

Based on a consistent set of attractions that were open and provided visitor numbers for 2016 through to 2021, we can see a decline in the proportion of visits to free attractions since the start of the pandemic. This is linked with the lower maximum capacity relative to 2019 at free attractions and potentially also a consumer inclination to spend more on days out after lockdown limitations were lifted.

We may see this pattern reverse in 2022 due to the impact of rising inflation on consumer spending habits.

Annual trend in visit volume to free vs. paid attractions



Visitor Admission Trends 2021: Region by Admission Charge & Area Type

Results indicate that attractions in coastal areas across the North East and South West show the greatest increases in visitors admissions. However, findings should be treated with caution due to low base sizes.

Visitor Admission Trends 2021: Regional breakdown by admission charge & area type

2020/21 change %	Free	Paid	Coastal	Rural	Urban
Total Average	+19	+37	+75	+31	+42
North West (113)	+49	+66	+64	+80 <50	+33
North East (59)	+30 <50	+58 <50	+156 <50	+27 <50	+86 <50
Yorks / Humber (87)	+41 <50	+47	(<10)	+39 <50	+49 <50
East Midlands (82)	+11 <50	+28 <50	(<10)	+26	+8 <50
West Midlands (78)	+21 <50	+36	N/A	+38 <50	+23 <50
East (121)	+25 <50	+32	+50 <50	+25	+30 <50
London (68)	+1 <50	+40 <50	N/A	(<10)	+12
South East (193)	+8	+21	+18 <50	+15	+26
South West (174)	+89 <50	+50	+94 <50	+43	+44 <50

Base: All attractions providing visits data for current and previous year (979)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)
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Visitor Admission Trends 2021: Child Visits Summary

The volume of children visiting attractions increased by 41% from 2020 to 2021 – a larger increase than overall admissions (30%).

As such sites that attracted more family visitors performed better than more adult focused attractions.

However, schools have been slower to return, with schoolchildren admissions only increasing by 6% compared with 2020 following the steep decline of -84% in 2020.

Schoolchildren accounted for 4% of all admissions in 2021, which remained consistent with 2020 (also 4%), and lower than in 2019 (6%).

Change in all admissions by category

	2020/21 change [%]	2019/20 change [%]
Total Average (979)	+30	-65
30% or less children (485)	+36	-67
Over 30% children (155)	+29	-58

Change in volume of child admissions

	2020/21 change [%]	2019/20 change [%]
Child admissions (396)	+41	-61
Schoolchildren admissions (353)	+6	-84

Visitor Admission Trends 2021: By Visitor Origin

According to the International Passenger Survey, overseas visitors to the UK declined by 43% in 2021, compounding the 2020 decline of 73%.

This had a direct impact on the average volume of overseas visitors to English attractions, with a 39% decrease, compared with 2020.

However, when asked if the visitors numbers went up, down or stayed consistent, 41% of attractions said they welcomed more overseas visitors than in 2020. Among the 18% of attractions reporting a decline, there are some of England's largest attractions, explaining the fall in overseas visitors numbers.

In contrast local/ day visit average volume saw an increase of 26%, with over half of visitor attractions benefitting from this increase.

Average change in number of visits 2021 [%]

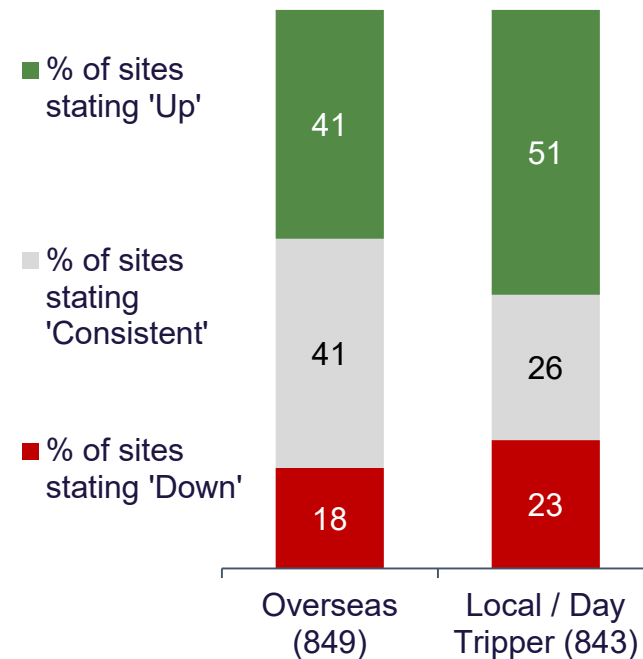


Overseas (156)



Local / Day (330)

Stated change in visits [%]



Base: All providing % of overseas/ local visitors and visits data for current and previous year

Base: All answering overseas/ local visitor perceptions question

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* Source: ONS International Passenger Survey - Travel Trends: 2021

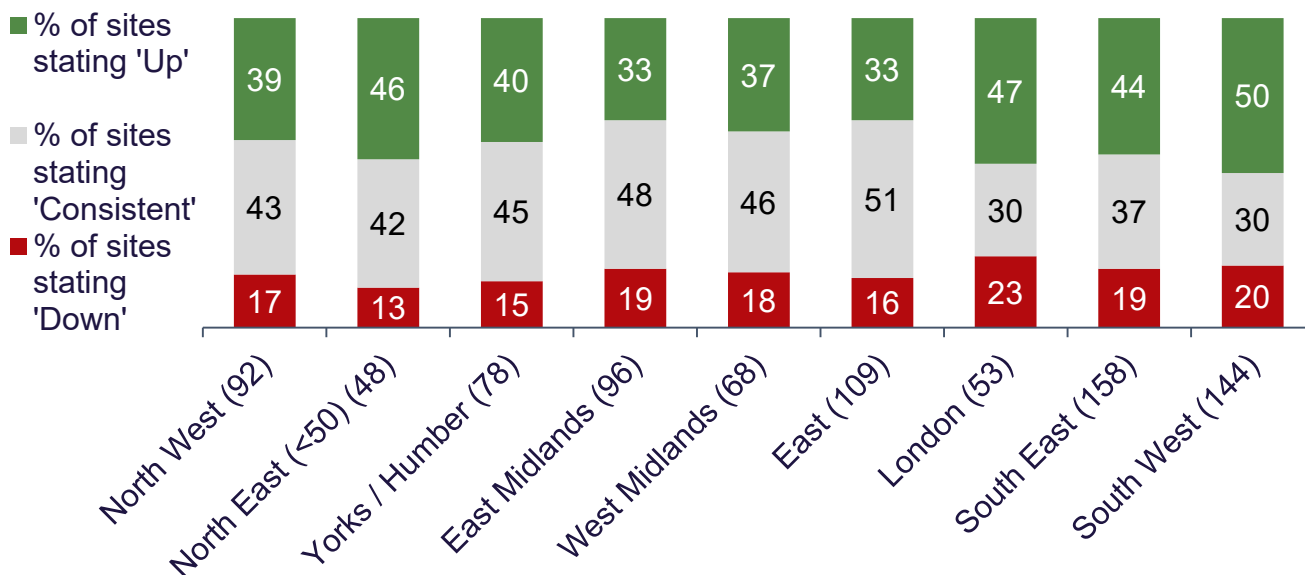
Visitor Admission Trends 2021: Overseas Visitors by Region

More attractions reported an increase in overseas visitors than a decline, across all regions.

South West, London and North East attractions were the most likely to see an increase in international tourists.

Please note that this is based on the number of attractions stating that overseas volume had increased/ remained consistent/ decreased. The volume of overseas visitors at a sector level actually declined, driven by a significant drop in overseas visitors to many of England's largest attractions.

2020/21 Stated change in volume of overseas visitors [%]



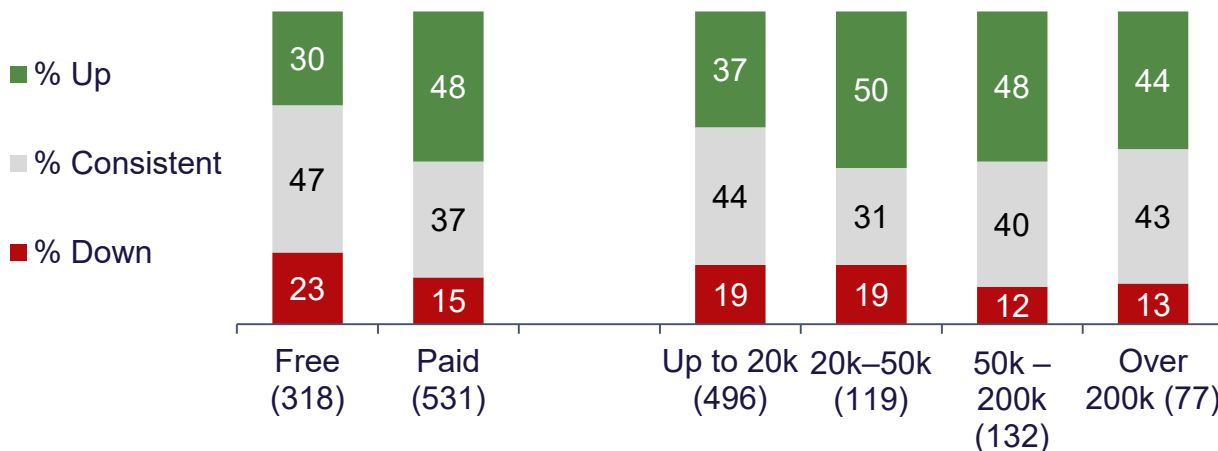
Visitor Admission Trends 2021: Overseas Visitors by Admission Charge & Size

Paid attractions were more successful in winning back overseas visitors than paid sites, with 48% of sites charging for entry increasing the volume of overseas tourists compared with just 30% of free attractions.

Smaller sites with fewer than 20,000 visitors were the least likely to increase overseas visits.

Please note that this is based on the number of attractions stating that overseas volume had increased/ remained consistent/ decreased. The volume of overseas visitors at a sector level actually declined, driven by a significant drop in overseas visitors to many of England's largest attractions.

2020/21 Stated change in volume of overseas visitors
[%]



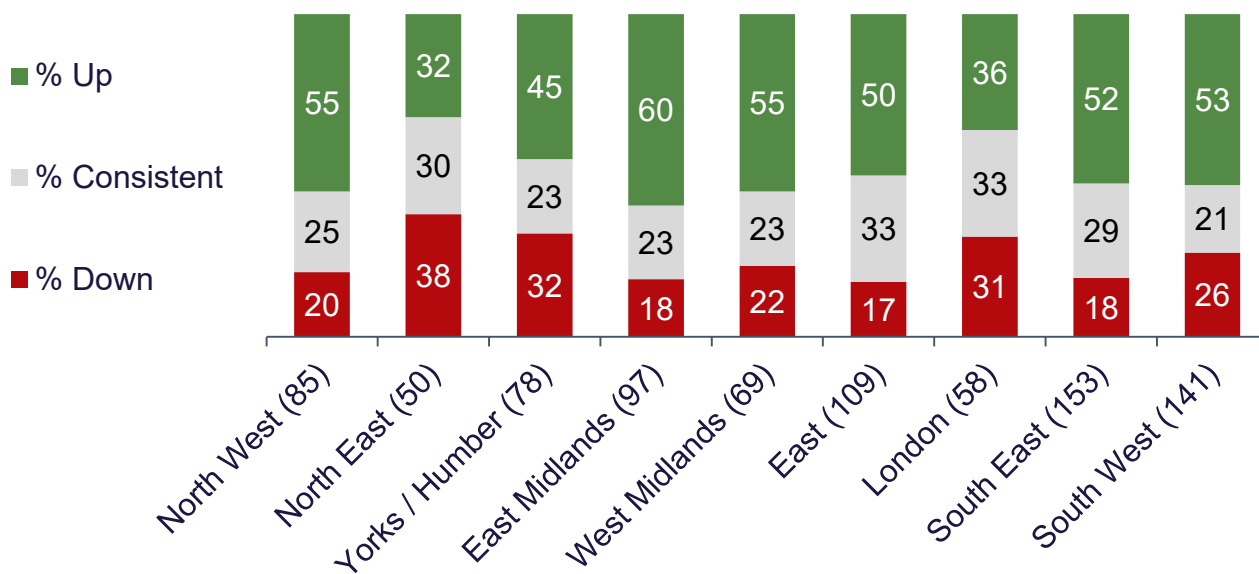
Base: All answering overseas visitor question (849)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2021: Local / Day Trip Visitors by Region

Local/ day trip visits increased across most regions, with attractions in the East Midlands, North West and West Midlands were the most likely to report growth.

The North East was the exception, with 38% of attractions reporting a decline compared with 32% reporting an increase. However, this is off the back of growth in this audience during 2020, setting a higher benchmark than the other regions.

2020/21 Stated change in volume of local / day trip visitors [%]



Base: All answering local visitor question (843)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

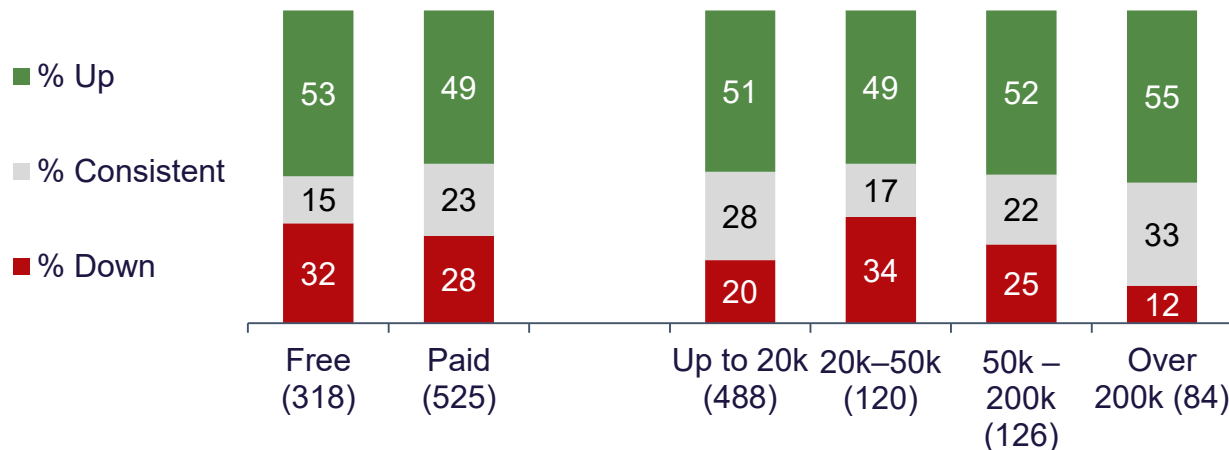
* % change is under 1%, therefore not shown

Visitor Admission Trends 2021: Local / Day Trip Visitors by Admission Charge & Size

England's largest attractions (with over 200,000 visitors) were the most likely to increase their day trip audience, with a net of 43% of attractions increasing the volume of day trippers.

Performance was comparable between free and charging sites.

2020/21 Stated change in volume of local / day trip visitors [%]



Base: All answering local visitor question (843)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2021: Family Group Visitors by Region

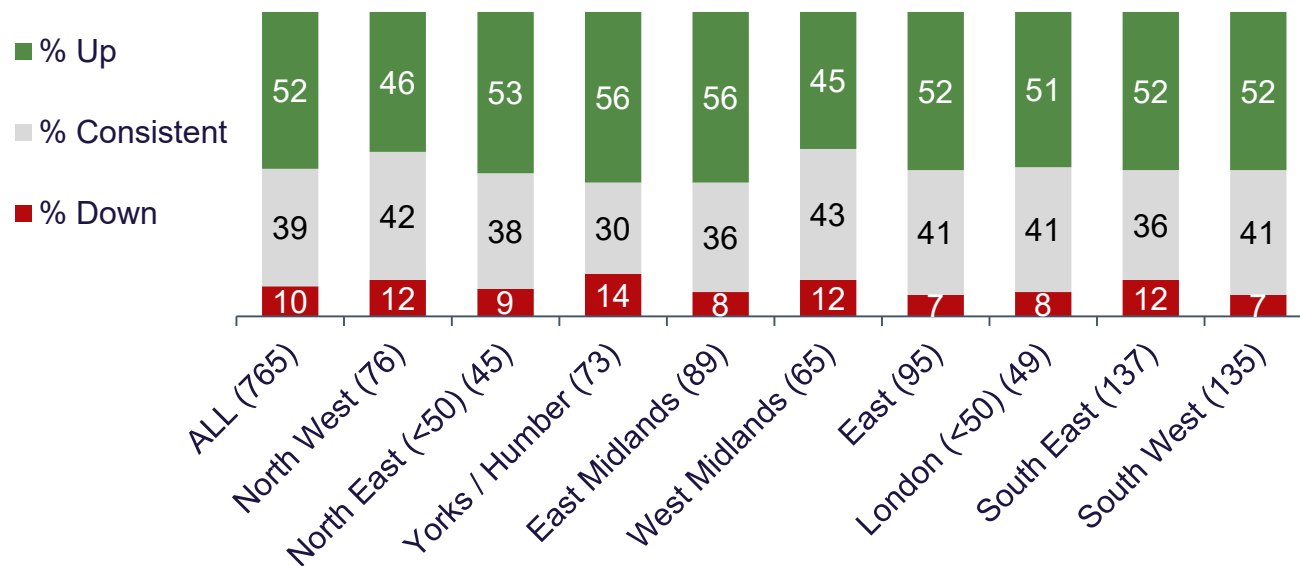
In 2021, the proportion of family visits ranged between 31% to 42% across all regions.

This is similar to 2020 for most regions, but North East saw a large proportional increase from 21% in 2020 to 35% in 2021.

The family audience expanded across all regions.

2021, % visiting in a family group (mean share)	37	38	35 (<50)	38	36	31	42	32	39	34
2020, % visiting in a family group (mean share)	34	30	21	40	41	35	35	25 (<50)	37	35

2020/21 stated change in the volume of family visitors [%]



Base: All answering family group question (765)

Base: All stating the proportion of visits by families (751)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Visitor Admission Trends 2021: Family Group Visitors by Admission Charge & Size

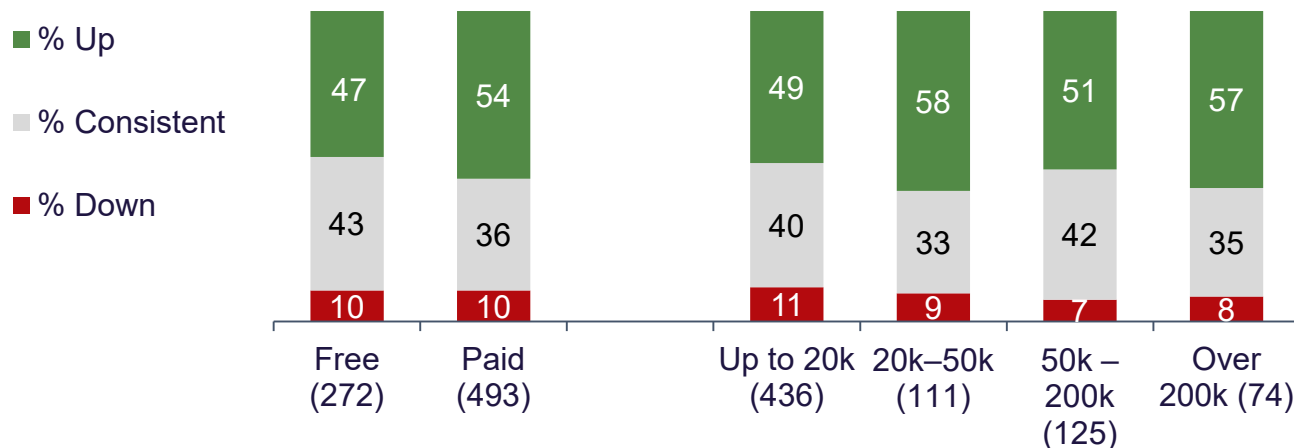
Consistent with previous years, larger attractions tend to attract more family visits.

Free and charging sites both grew their family audience in 2021, with families accounting for a similar proportion of visits for both attraction types.

2021, % visiting in a family group (mean share)	35	37
2020, % visiting in a family group (mean share)	30	38

31	38	47	53
27	39	45	41

2020/21 stated change in the volume of family visitors [%]



Base: All answering family group question (765)

Base: All stating the proportion of visits by families (751)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2021: Family Group Visitors by Attraction Category

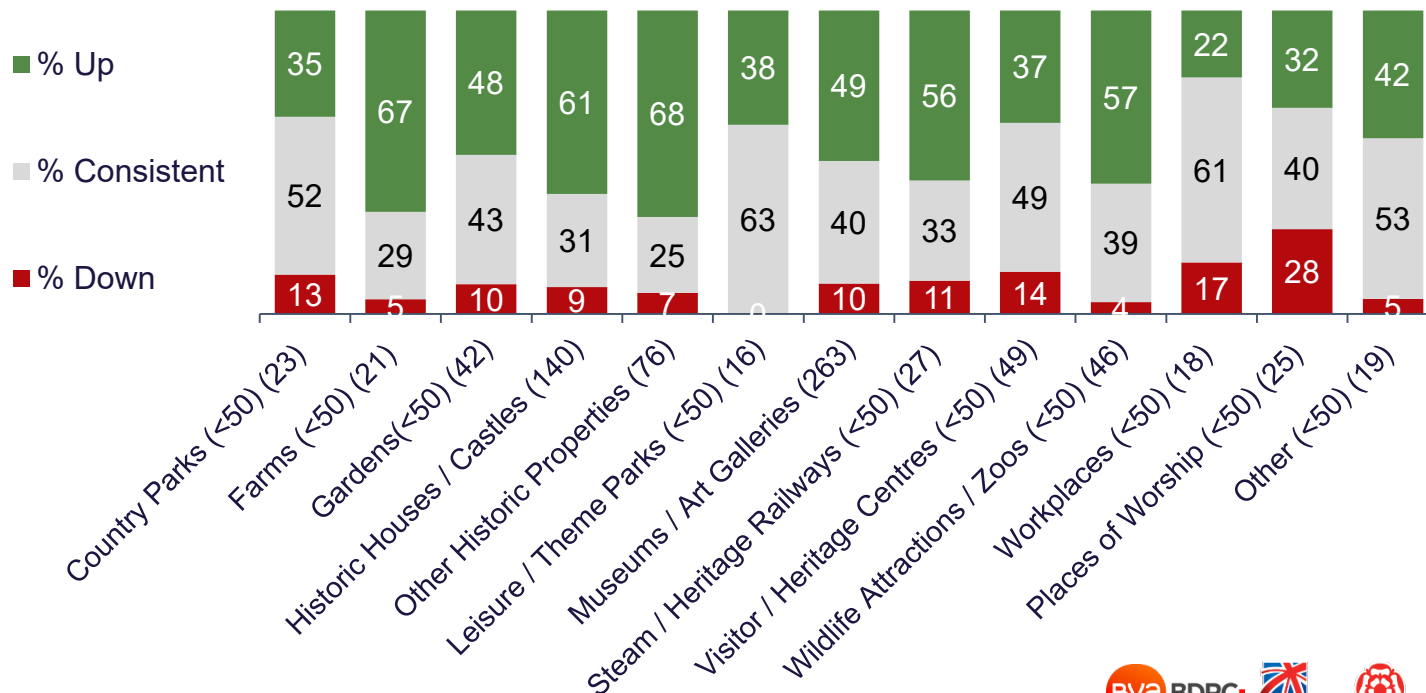
Attractions naturally fall into three tiers of family engagement:

- **High:** Leisure/ theme parks (82%) and Farms (81%)
- **Moderate:** Country Parks (62%), Steam/ Heritage railways (58%) and Wildlife attractions (54%)
- **Low:** All other types, with penetration of family groups falling below 40%

There are clear differences in category performance, with farms, historic properties, steam/heritage railways and wildlife attractions the most likely to have seen growth in the family market during 2021.

2021, % visiting in a family group (mean share)	62	81	29	29	32	82	34	58	34	54	17	15	37
	(<50)	(<50)	(<50)		(<50)	(<50)		(<50)	(<50)	(<50)	(<50)	(<50)	(<50)
2020, % visiting in a family group (mean share)	57	82	25	29	29	76	29	66	31	49	18	17	30
	(<50)	(<50)	(<50)		(<50)	(<50)		(<50)	(<50)	(<50)	(<50)	(<50)	(<50)

2020/21 stated change in the volume of family visitors [%]



Base: All answering family group question (765)

Base: All stating the proportion of visits by families (751)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)



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6. Admission charge & revenue trends

Adult Admission Charges 2021

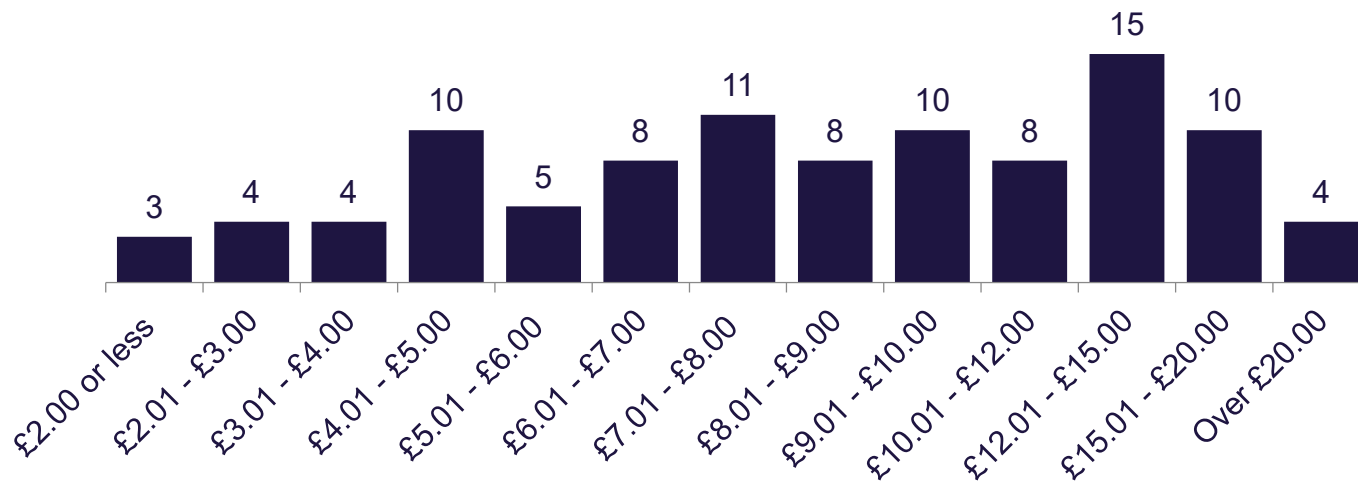
The average adult (high season) admission price increased to £10 in 2021 – the highest we have seen to date.

This follows a reduction in price in 2020 associated with a reduced offer due to COVID restrictions at a number of large attractions.

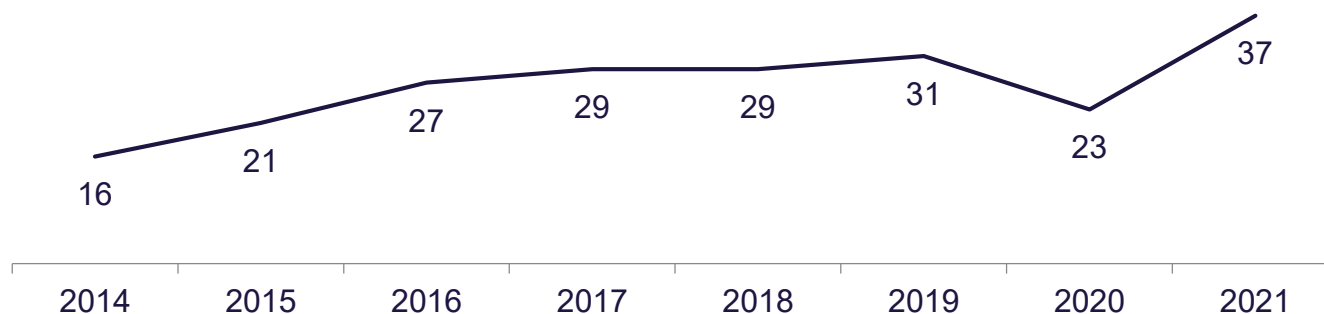
37% of charging attractions had a peak season adult entry price of above the £10 mark in 2021 – a 6% increase on 2019 and a 14% increase on 2020. 14% charged over £15 for entry.

The proportion of attractions charging £5 or less for adult entry dropped to 21%, down from 24% across 2018-2020 and continuing the long term trend of decline (2017: 29%, 2016: 32%, 2015: 35%, 2014: 39%, 2013: 41%).

Adult admission charge during high season for the main attraction [%]



% of attractions charging over £10 (peak season adult entry)



Adult Admission Charge Trends 2021: By Attraction Category

At an overall level adult admission fees increased by 11% in 2021, which far exceeds the inflationary trend of 4 to 6% seen before 2020. However, the average reduction in entrance fees in 2020 means that prices are still lower than they would have been had the previous inflationary trend continued.

Adult entrance price inflation was highest for garden attractions (+19%) and historic houses/ castles (+14%).

The change in adult admission charges and average entrance prices are shown by attraction category to the right.

Further to this, child entry fees at paid attractions remain in line with previous years at 88%.

In 2021 the average child entry price was £6.15, which was also an 11% increase on 2020, consistent with the adult price inflation.

Change in adult admission charge: by attraction category

	Average 2021 charge	2020/21 change [%]	2019/20 change [%]
ALL PAID ATTRACTIONS (743)	£10	+11	-6
Country Parks (10) ^{<50}	£8.25	(<10)	(<10)
Farms (15) ^{<50}	£17.54	(<10)	(<10)
Gardens (68)	£9.35	+19	-11
Historic Houses/Castles (273)	£10.55	+14	-13
Other Historic Properties (81)	£9.85	+9	+1
Leisure/Theme Parks (14) ^{<50}	£15.48	(<10)	(<10)
Museum/Art Galleries (152)	£7.24	+8	+2
Steam/Heritage Railways (24) ^{<50}	£9.80	*	+6
Visitor/Heritage Centres (30) ^{<50}	£8.75	+12	-3
Wildlife Attractions/Zoos (46) ^{<50}	£12.58	+1	+9
Workplaces (13) ^{<50}	£14.32	(<10)	(<10)
Places of Worship ^{<10}	(<10)	(<10)	(<10)
Other (14) ^{<50}	£10.71	(<10)	(<10)

^{<50} Base size below 50 (please treat with caution)

^{<10} Base size less than 10 (figure therefore omitted)

* %change is under 1%, therefore not shown

Adult Admission Charge Trends 2021: By Region

Adult entrance increased across all regions, with the largest price increases recorded in the South West and South East (both +15%) and West Midlands (+13%).

UK inflation for 2021, based on the Consumer Price Index, was 5.5%. The North East was the only region to increase entrance prices by less than inflation during 2021, with a 2% rise. However, it was one of only two regions to increase prices in 2020, so this smaller increase makes the price rise more comparable to that of other regions across the last 2 years.

Average entrance fees in 2021 ranged from £8.67 in East Midlands to £13.80 in London with most prices falling at £9-10.

Change in adult admission charge: by region

	Average 2021 charge	2020/21 change [%]	2019/20 change [%]
North West (69)	£9.72	+8 (<50)	-8 (<50)
North East (46) ^{<50}	£9.58	+2 (<50)	+3 (<50)
Yorks / Humber (63)	£8.80	+7 (<50)	+1 (<50)
East Midlands (72)	£8.67	+7 (<50)	-9 (<50)
West Midlands (72)	£10.43	+13 (<50)	-14 (<50)
East (93)	£9.56	+10	-3
London (40) ^{<50}	£13.80	+10 (<50)	-2 (<50)
South East (141)	£10.42	+15	-9
South West (151)	£10.12	+15	-8

Base: All answering admission charge question in 2021 (748)

Base: All answering admission charge question in 2020 and 2021 (463)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

^{<50} Base size below 50 (please treat with caution)

Adult Admission Charge Trends 2021: By Attraction Size and Area Type

Consistent with previous years, we see a strong link between the number of visitors to an attraction and the price of admission, with popular sites able to command a higher entrance fee.

Sites with 20,000 visitors or less per year charge £7.63 on average, whilst the mean score for sites with over 100,000 visitors was £14.38.

We see different patterns in price inflation across 2020 and 2021. Large sites typically reduced their entrance prices in 2020, associated with a reduced offer, and so the comparable increase with 2021 was all the greater. For example, sites with over 100,000 visitors reduced prices by 14% in 2020, but increased them by 19% in 2021. In contrast, smaller sites made more modest increases across both years.

Entrance price increases were fairly consistent across different area types.

Change in adult admission charge: by attraction size

	Average 2020 charge	2020/21 change [%]	2019/20 change [%]
20,000 or less p.a. (359)	£7.63	+1	+4
20,001 – 50,000 p.a. (122)	£9.73	+8	+4
50,001 – 100,000 p.a. (77)	£12.24	+16	-9
Over 100,000 p.a (163)	£14.38	+19	-14

Change in adult admission charge: by area type

	Average 2021 charge	2020/21 change [%]	2019/20 change [%]
Coastal (101)	£9.32	+9	-1
Rural (450)	£10.26	+12	-8
Urban (197)	£9.79	+8	-5

Base: All answering admission charge question in 2021 (748)

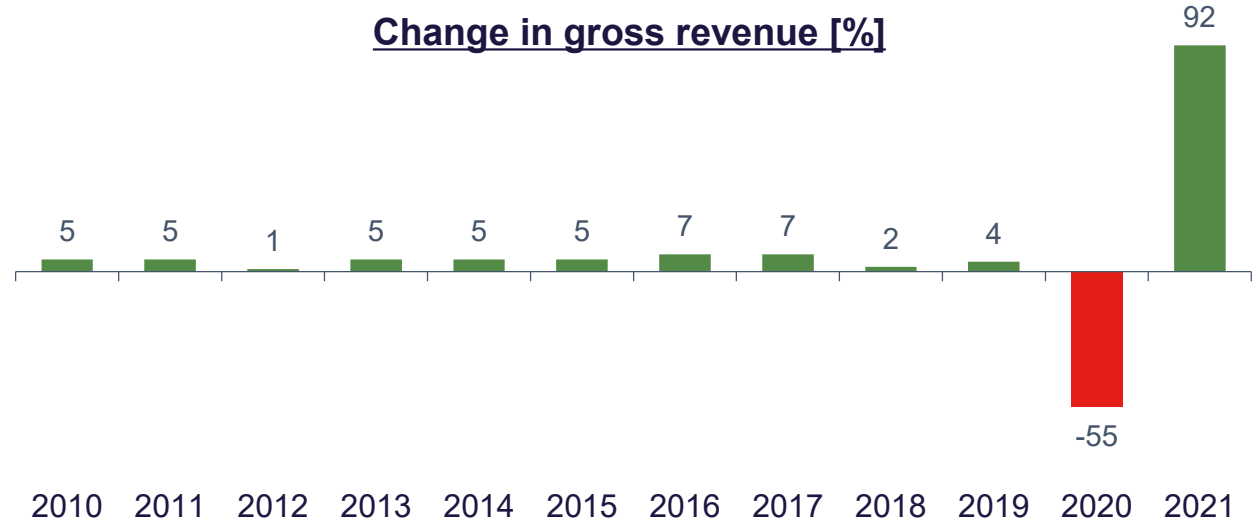
Base: All answering admission charge question in 2020 and 2021 (463)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions increased by 92% in 2021, regaining some of the ground lost in 2020 when revenue declined by 55% on average.

This increase is larger than that seen in visitor volume (30%), explained by higher entrance prices, use of funding and expansion of commercial operations during the pandemic.



Gross Revenue Index Trend

In the same way that the volume of visits to attractions is indexed on pages 35-36, we have used an index to show the gross revenue trend.

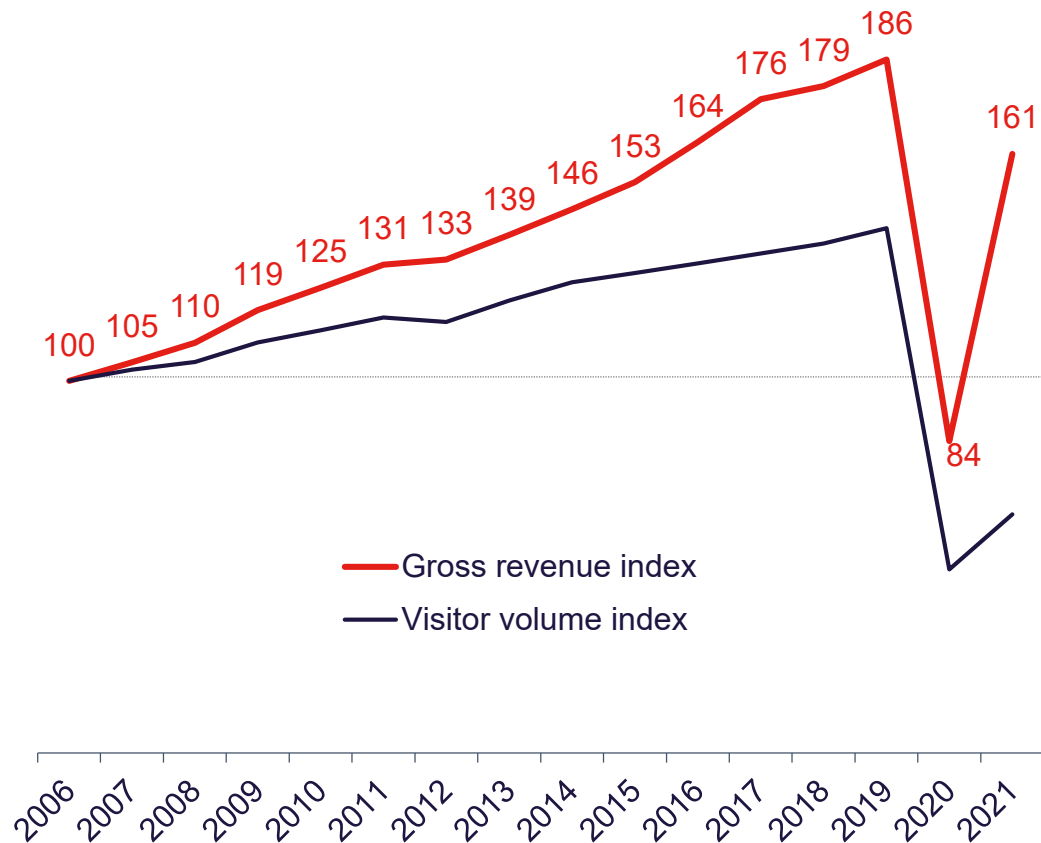
In this chart the **base year for both indexes is 2006, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. gross revenue increased by 5% between 2006 and 2007, increasing the index for 2007 to 105.

The visitor volume index calculation is based on the total visit volume across all attractions responding to the survey, therefore accounting for different attraction sizes. However, we only capture the % change in gross revenue rather than absolute revenue figures. The gross revenue index therefore trends the average change in revenue across attractions, rather than the absolute change in revenue at a sector level.

By presenting the data in this way we are able to see that, despite the very large percentage increase in 2021, gross revenue still remains below pre-pandemic levels. The index of 161 is a little below 2016 levels.

In comparison with visitor volume, gross revenue has increased more steeply in the past, and has recovered more rapidly following the COVID pandemic.

Gross revenue index trend, compared to visitor volume index trend



Gross Revenue Trend 2021: By Attraction Category

All attraction categories reported an increase in gross revenue, but there was a wide range in the extent of this increase, from 14% for country parks, to 167% at gardens.

These differences are associated with the level of rebound in visitor admissions and the level of change in the admission fee.

The change in gross revenue is shown by attraction category to the right, but should be treated with caution where there are low base sizes.

Average % change in gross revenue

	2020/21 change [%]	2019/20 change [%]
Country Parks (18) < ⁵⁰	+14	-26
Farms (19) < ⁵⁰	+52	-38
Gardens (35) < ⁵⁰	+167	-44
Historic Houses / Castles (124)	+123	-58
Other Historic Properties (61)	+114	-63
Leisure / Theme Parks (14) < ⁵⁰	+90	(< ¹⁰)
Museums / Art Galleries (210)	+67	-55
Steam/Railways (18) < ⁵⁰	+103	-63
Visitor / Heritage Centres (41) < ⁵⁰	+156	-65
Wildlife Attractions / Zoos (37) < ⁵⁰	+45	-36
Workplaces (15) < ⁵⁰	+45	-60
Places of Worship (23) < ⁵⁰	+84	-60
Other (16) < ⁵⁰	+50	-69

Gross Revenue Trend 2021: By Region

Gross revenue increased across the country, but was highest in the South West (+148%) and North West (+135%) – the regions reporting the strongest increases in visitor admissions in 2021.

London recorded the third highest level of growth (+97%), but this followed the deepest decline in 2020 (-67%).

Average % change in gross revenue

	2020/21 change [%]	2019/20 change [%]
North West (66)	+135	-60
North East (41) ^{<50}	+65	-56
Yorks / Humber (63)	+76	-35
East Midlands (63)	+74	-59
West Midlands (48) ^{<50}	+77	-58
East (77)	+72	-51
London (40) ^{<50}	+97	-67
South East (116)	+61	-59
South West (114)	+148	-53

Gross Revenue Trend 2021: By Admission Charge & Attraction Size

Charging attractions benefitted from the entrance price increases and reported better gross revenue statistics than free sites (an increase of 105% in 2021, vs. 68% for free attractions).

Large attractions with over 100k visitors a year were initially more cushioned against the impact of the pandemic and saw a smaller decline in revenue in 2020 (-45% vs. the sector average of -55%). However, they also saw smaller gains in 2021. Many of these large attractions will have already had additional revenue streams in place beyond visitor admissions, or the resource to develop these quickly in 2020 (for example an online shop or fundraising initiatives); this will have insulated them from the initial impact, but perhaps left less scope to make further significant commercial enhancements in 2021.

Average % change in gross revenue: by admission charge

	2020/21 change [%]	2019/20 change [%]
Free (221)	+68	-54
Paid (410)	+105	-55

Average % change in gross revenue: by attractions size

	2020/21 change [%]	2019/20 change [%]
Up to 20k p.a. (339)	+100	-60
20k – 50k p.a. (106)	+118	-56
50k – 100k p.a. (53)	+93	-54
Over 100k p.a. (121)	+56	-45

Donation Revenue Trend 2021 vs. 2019

In total, 81% of attractions accepted donations in 2021.

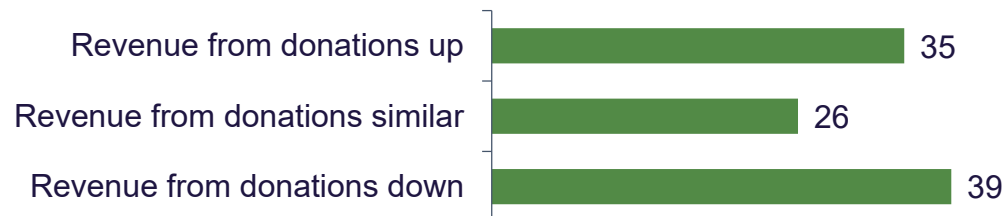
Results are quite polarised when we look at the donation revenue trend: over a third of sites (35%) reported an increase in donations in 2021, while a similar proportion (39%) reported a decrease when compared with before the pandemic in 2019.

This is explained by variations in experience across different types of attraction. Charging sites have typically been able to equal or outperform the donation revenue secured in 2019, while free sites were more likely to report a decline.

Smaller sites (with up to 10,000 visitors) are also more likely to have seen a fall in donations than larger sites.

In both instances this may relate to staff numbers and the time and money available to make requests on site or develop donation campaigns.

% change in revenue from donations in 2021 compared with 2019



% change in donation revenue amongst sites accepting donations: by admission charge

[%]	Revenue down	Revenue similar	Revenue up	NET ('up' minus 'down')
Free (240)	56	23	22	-34
Paid (356)	28	29	43	+15

% change in donation revenue amongst sites accepting donations: by attraction size

[%]	Revenue down	Revenue similar	Revenue up	NET ('up' minus 'down')
10k or less p.a. (207)	43	32	24	-19
10k - 50k p.a. (192)	38	24	38	0
50k - 100k p.a. (63)	35	21	44	+10
Over 100k p.a. (122)	36	22	42	+6

Base: All answering revenue from donations question (735)

Base: All accepting donations (596)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gift Aid Revenue Trend 2021 vs. 2019

58% of sites qualify for gift aid, and this has remained an important revenue source in 2021, with 62% of attractions securing similar or higher levels of gift aid to before the pandemic in 2019.

Free sites were more likely to report a decrease in gift aid revenue than charging sites in 2021, with a net decline of 44% for free sites compared with a net increase of 10% for sites with an entrance fee.

Smaller sites with fewer than 10,000 visitors reported a net decrease of 21% (vs. a sector average of -7%), while larger sites maintained gift aid at a similar level or managed to increase this in 2021, perhaps helped by membership schemes.

% change in Gift Aid in 2021 compared with 2019



% change in Gift Aid from tickets, memberships and donations in 2021 compared with 2019 amongst sites collecting gift aid: by admission charge

	% Gift Aid down	Gift Aid similar	Gift Aid up	NET ('up' minus 'down')
Free (131)	56	31	12	-44
Paid (290)	30	29	41	+11

% change in Gift Aid from tickets, memberships and donations in 2021 compared with 2019 amongst sites collecting gift aid: by attraction size

	Gift Aid down	Gift Aid similar	Gift Aid up	NET ('up' minus 'down')
10k or less p.a. (237)	42	37	21	-21
10k - 50k p.a. (172)	31	29	40	+9
50k - 100k p.a. (74)	39	24	37	-3
Over 100k p.a. (162)	35	22	35	0

Base: All answering Gift Aid question (724)

Base: All accepting gift aid (421)

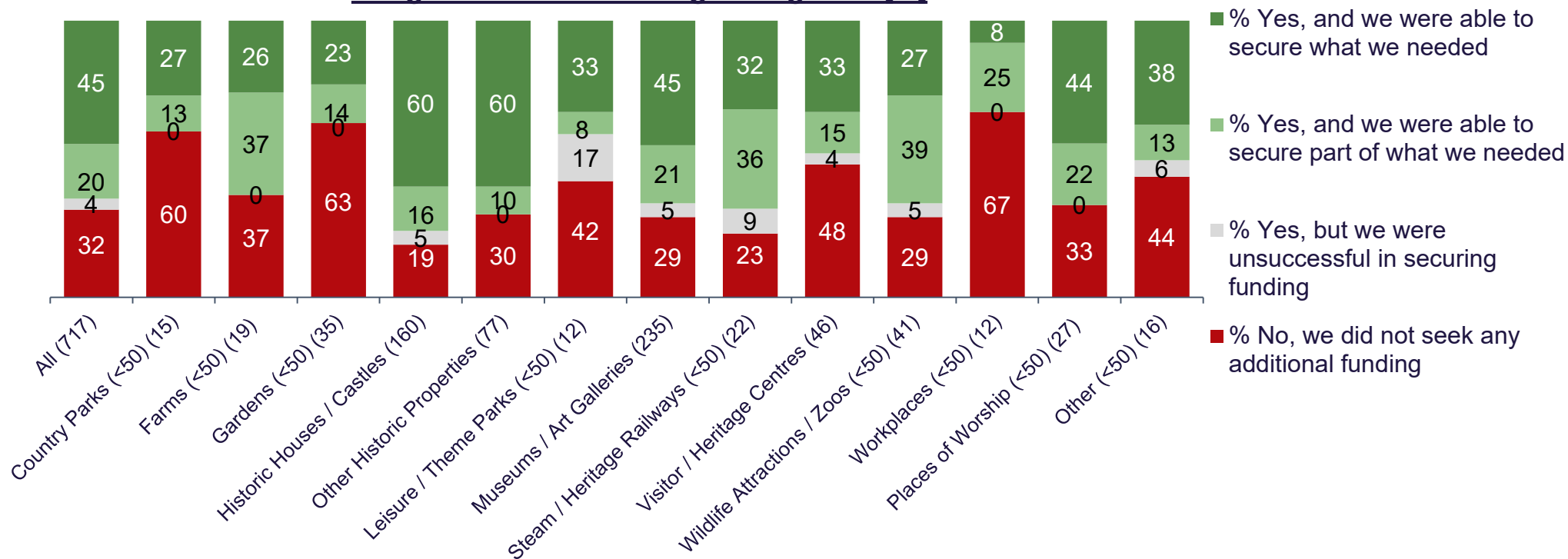
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Additional Funding Sought 2021

68% of all attractions sought additional funding during 2021, of which two thirds successfully secured the full amount they needed.

Historic Houses, and Other Historic Properties were mostly likely to seek and secure additional funding (with English Heritage particularly active in this area), whilst Workplaces, Gardens and Country Parks were less likely to seek funding than other categories.

Sought additional funding during 2021 [%]



Base: All answering seeking additional funding in 2021 (717)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

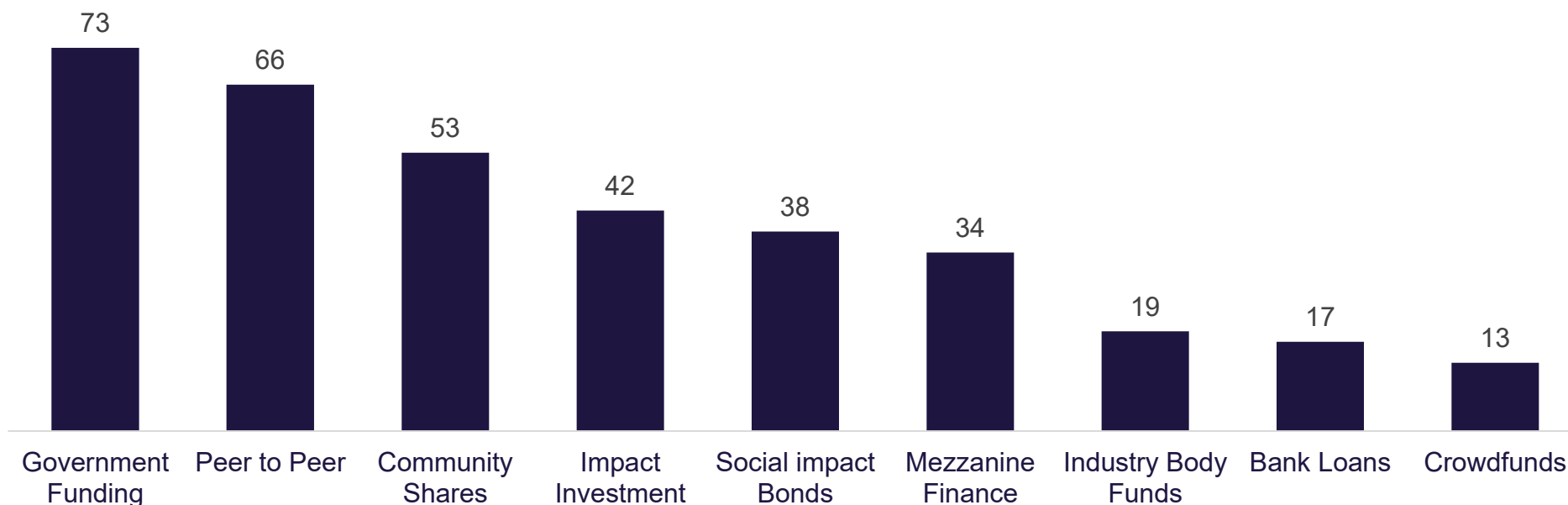
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Past Funding Use

The most popular sources of funding attractions have used were government funding (73%), peer to peer lending (66%) and community shares (53%).

Crowdfunds (13%), which are a relatively new source of funding, are the least likely to have been used.

Types of funds attractions have used in the past [%]



Past Funding Use: By Attraction Category

The different types of fund used, split by attraction category, are shown in the table below.

Types of funds have used in the past: by attraction category [%]

	Gov. funding	Peer to peer lending	Community shares	Impact investment funds	Social impact bonds	Mezzanine finance	Industry funding	Bank loans	Crowd-funding
Country Parks (17) (<sup>50)	69	47	50	27	27	27	0	12	12
Farms (18) (<sup>50)	83	61	33	28	17	11	0	56	33
Gardens (35) (<sup>50)	46	63	46	20	17	20	20	21	17
Historic houses/ castles (156)	82	83	73	71	68	61	12	14	5
Other Historic Properties (75)	77	79	73	68	67	64	11	9	9
Leisure/ Theme Parks (13) (<sup>50)	69	69	62	23	31	23	23	92	8
Museums /galleries (220)	73	57	44	28	24	19	30	10	15
Steam/Heritage Railways (21) (<sup>50)	73	62	48	33	38	29	24	24	15
Visitor/ Heritage Centres (43) (<sup>50)	60	60	40	29	21	12	15	9	12
Wildlife attractions/ zoos (42) (<sup>50)	88	57	29	26	14	14	10	38	26
Workplaces (11) (<sup>50)	55	73	45	45	27	36	0	55	9
Place of Worship (25) (<sup>50)	64	56	32	24	16	20	32	8	8
Other (13) (<sup>50)	60	71	62	46	54	38	8	23	8

Base: All answering about funding sources in 2021 (689).

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<sup>50 Base size below 50 (please treat with caution)



VisitBritain



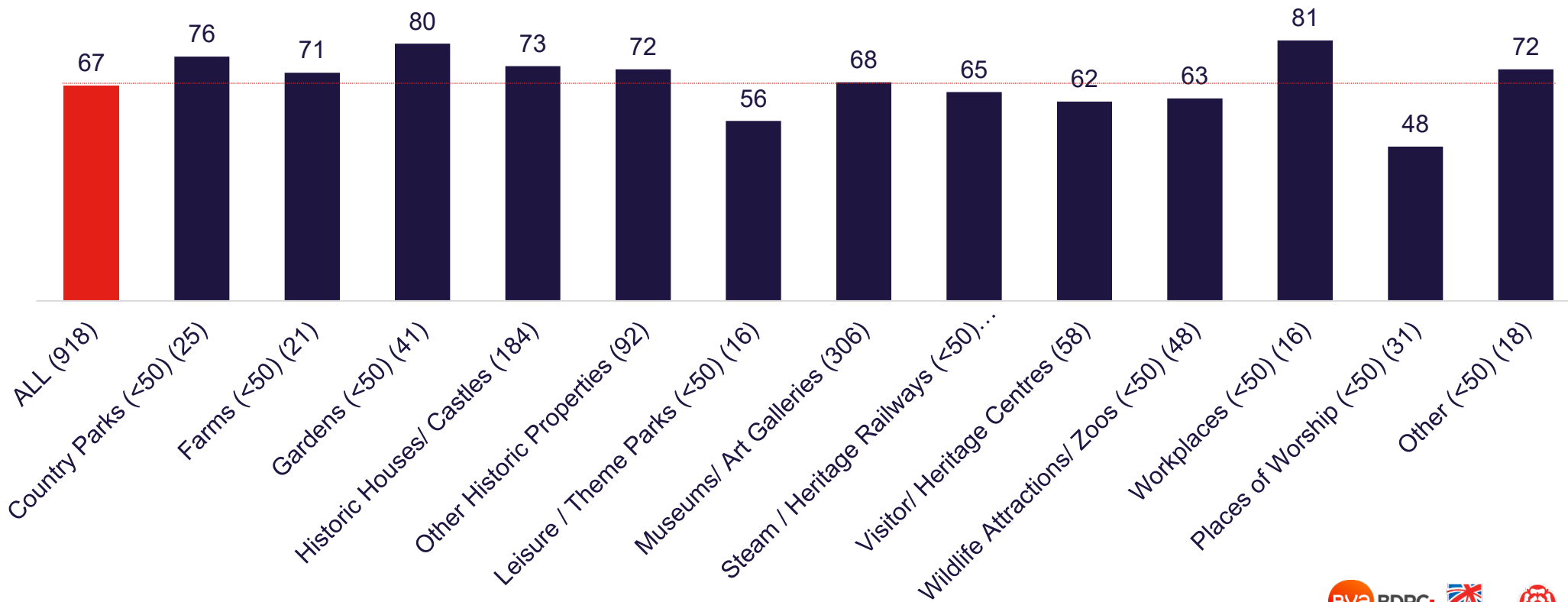
VisitEngland

7. Employment trends

Returning to Pre-pandemic Staffing Levels: By Attraction Category

The furlough/ job retention scheme came to an end on 30th September 2021 forcing organisations to make a choice about whether to retain staff or progress to redundancy at this point. In the first half of 2022 when this research was undertaken, two thirds of visitor attractions were back to pre-pandemic staffing levels. This is more common amongst workplaces (which will also have non-visitor facing operations) and gardens and country parks (which are close to pre-pandemic visitor levels). In contrast, only 56% of leisure / theme parks, and fewer than half of the places of worship participating in the research are back to pre-pandemic staffing levels.

% of attractions that are back to pre-pandemic staffing levels: by attraction category



Base: All answering back to pre-pandemic staffing levels (918)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

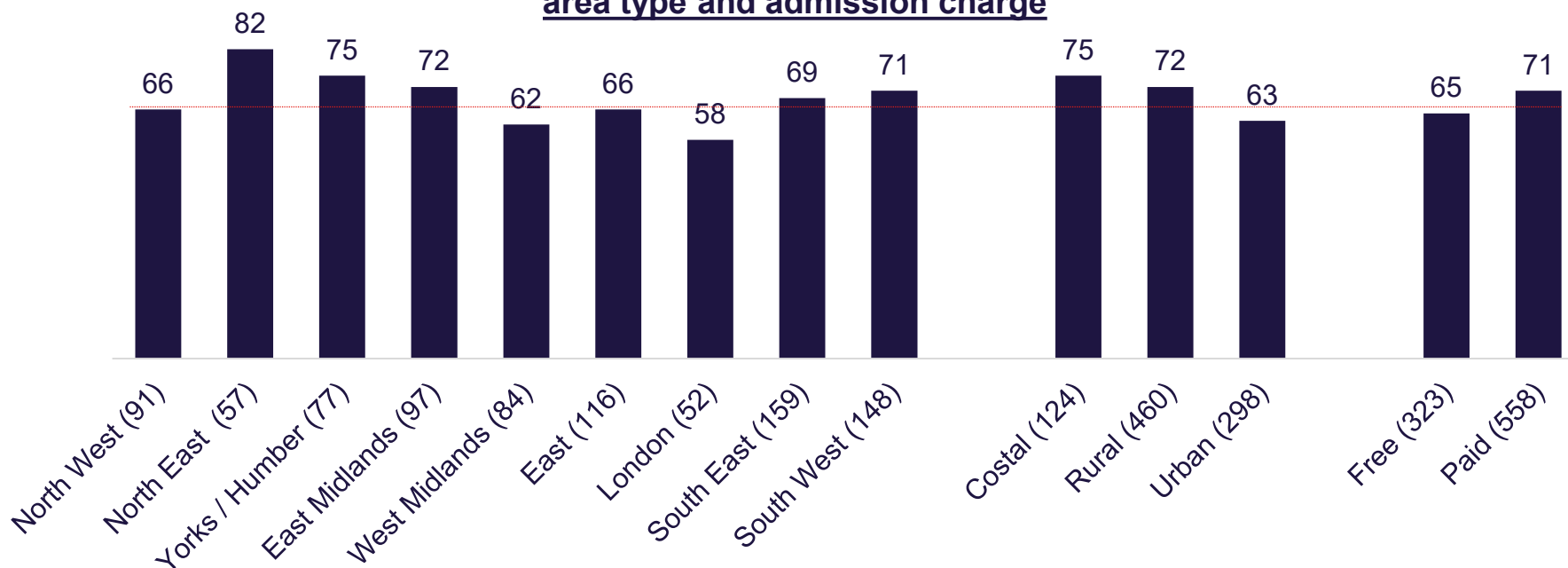
(<50) Base size below 50 (please treat with caution)

Returning to Pre-pandemic Staffing Levels: By Region, Area Type and Admission Charge

London based attractions saw the sharpest fall in visitor numbers in 2020 and the slowest growth in 2021, and this links with staffing levels, with only 58% of London sites back to pre-pandemic levels.

Sites in the North East are most likely to be back to 2019 staffing levels.

% of attractions which are back to pre-pandemic staffing levels: by region, area type and admission charge



Base: All answering back to pre-pandemic staffing levels (918)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Overall Employment Trends

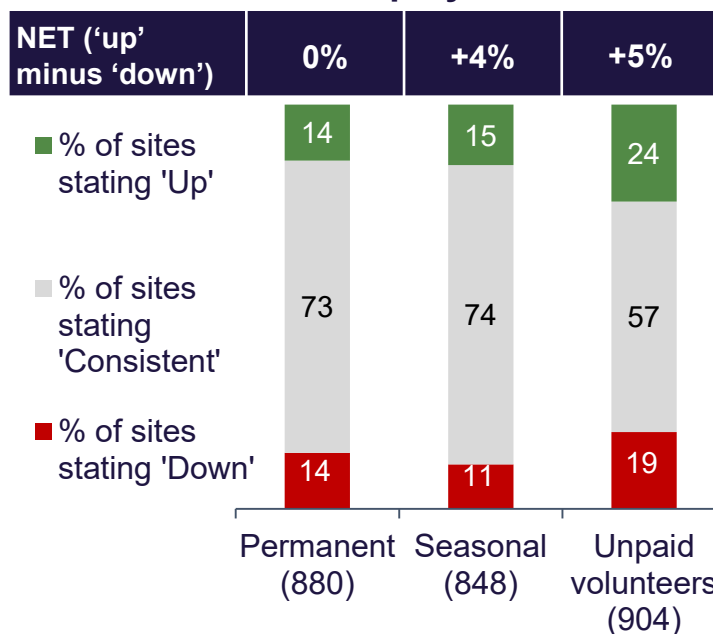
In 2021, site use of any permanent and seasonal staff remained consistent with 2020 (still down compared with before the pandemic), but there was a further decline in use of unpaid volunteers, 10% fewer sites using unpaid volunteers in 2021 compared with 2019 (2021: 77%, 2020: 80%, 2019: 87%).

However, amongst sites employing each type, staffing levels remained consistent or increased at a sector level. Year on year net changes (% increase minus % decrease) are detailed below:

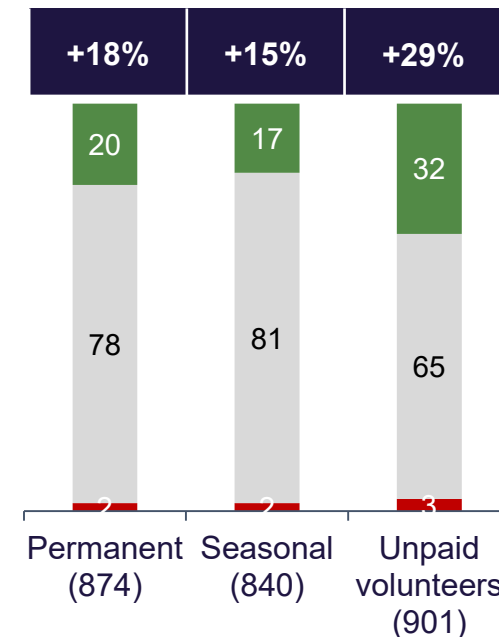
- Permanent staff: 2021:0%, 2020:-21%, 2019: +6%, 2018: +9%, 2017: +8%
- Seasonal staff: 2021:+4%, 2020:-25%, 2019: +4%, 2018: +7%, 2017: +8%
- Unpaid volunteers: 2021:+5%, 2020: -47%, 2019: +9%, 2018: +16%, 2017: +16%

Looking ahead to 2022, attractions expect an expansion in staff teams, in particular the use of unpaid volunteers, but this expectation is less bullish than it was in 2020.

2020/21 Stated change in employees



Anticipated change in employees in 2022

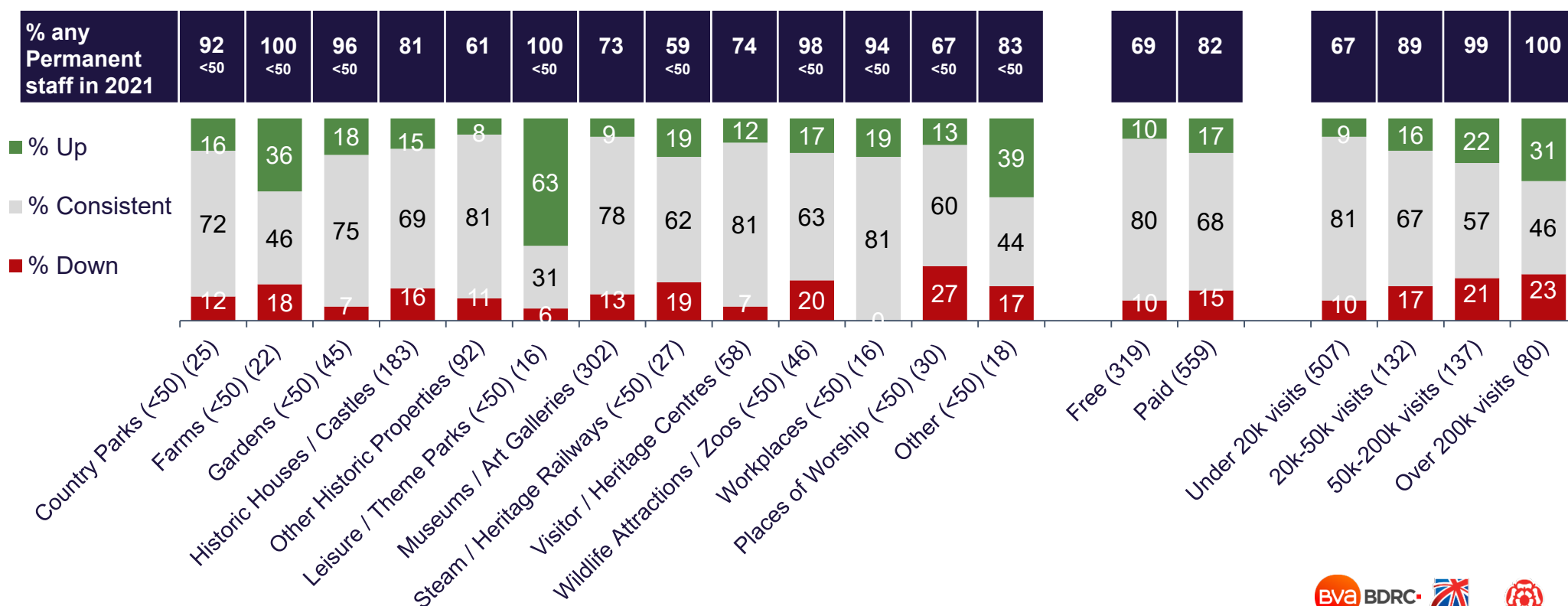


Permanent Employees: 2020 – 2021 trends

Leisure/ theme parks and farms have been the most reactive to the pandemic in terms of staffing, with reductions in 2020 followed by recruitment drives in 2021. The net changes (% increasing minus % decreasing) were: leisure/ theme parks (2021: +57%, 2020: -42%) and farms (2021: +18%, 2020: -27%). Places of worship were the most likely to reduce their permanent staff.

Just one lost/ additional member of staff counts as a decrease/ increase regardless of the size of attraction, so it follows that change is more likely at larger attractions so we see more polarization in results for larger sites.

2020/21 Stated change in permanent employees



Base: All answering employment questions
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

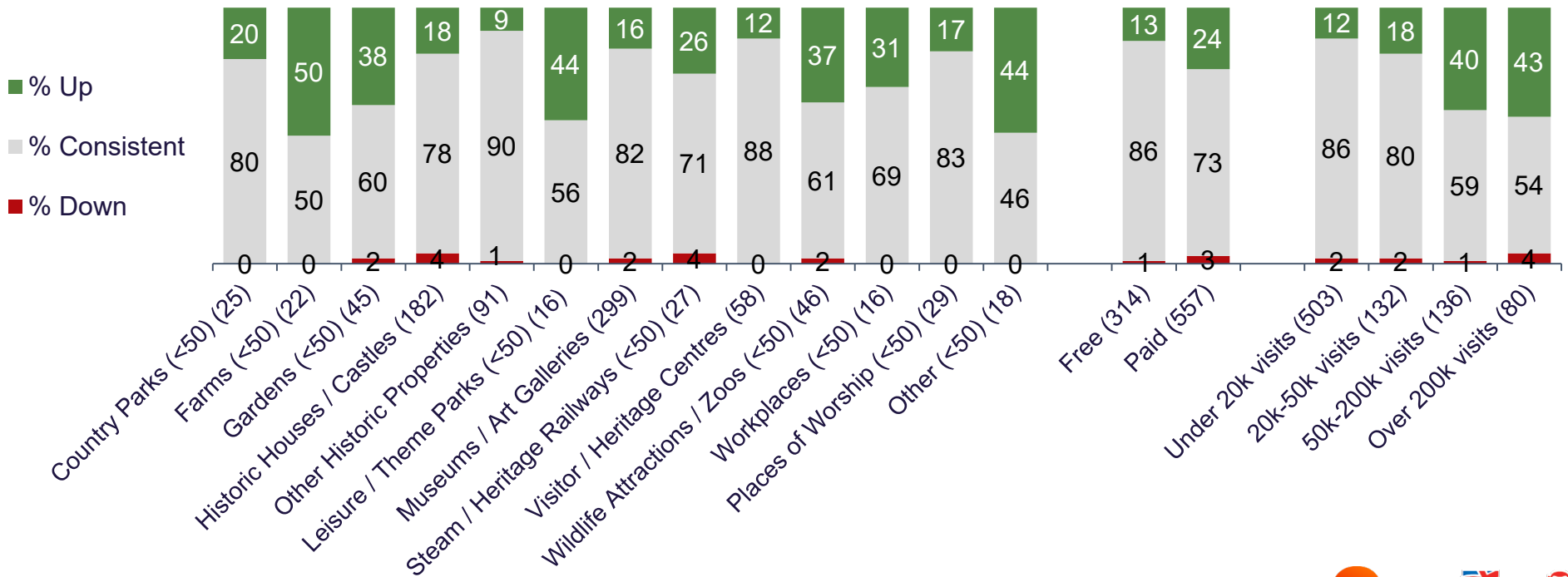
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Permanent Employees: 2022 Predictions

A large proportion of leisure/ theme parks (44%) and farms (50%) expect a further increase in permanent staffing in 2022.

Larger sites welcoming over 50,000 visitors a year have the most positive outlook with over 40% of these expecting to expand their permanent staffing levels.

Anticipated change in permanent employees in 2022



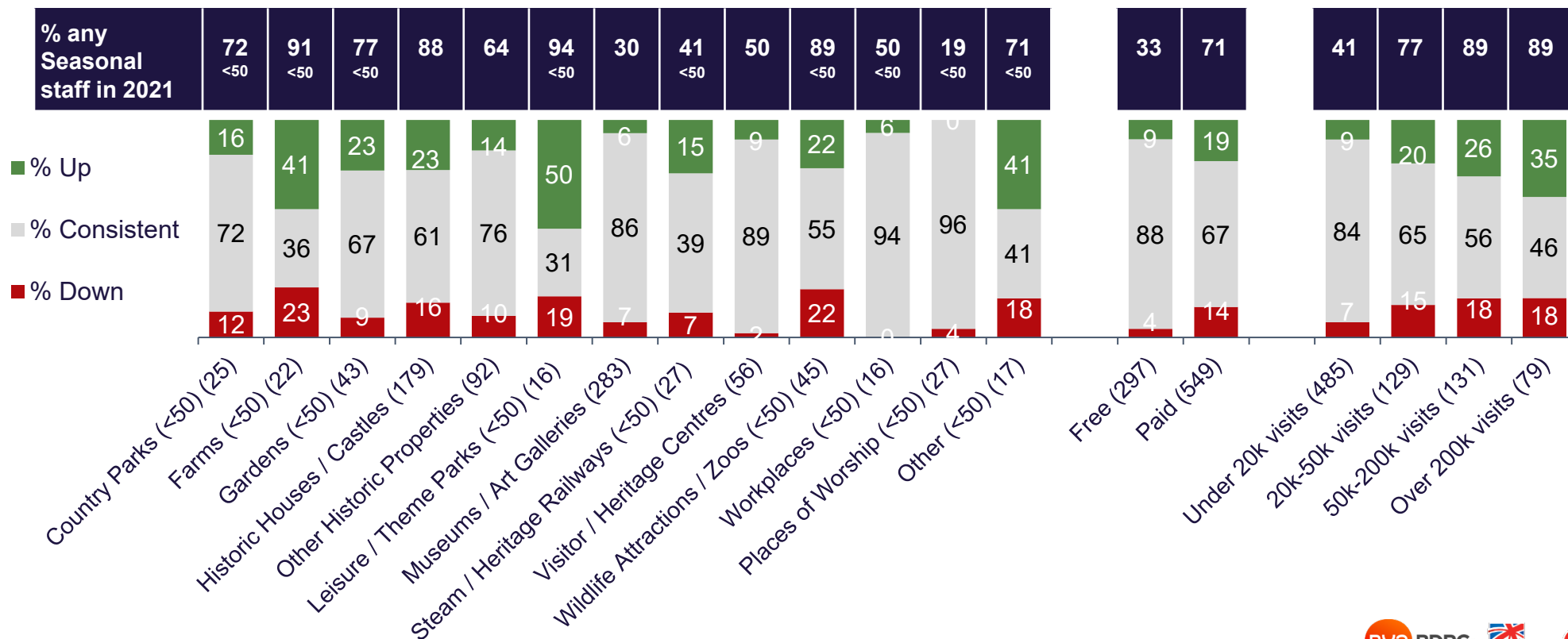
Base: All answering employment questions
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Seasonal Employees: 2020 – 2021 trends

In 2021, more sites reported an increase in seasonal staff numbers, rather than a decrease, suggesting some increased reliance on this temporary staffing resource. This varied by attraction category, with leisure/ theme parks, and farms in particular making more use of seasonal staff in 2021.

2020/21 Stated change in seasonal employees



Base: All answering employment questions
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

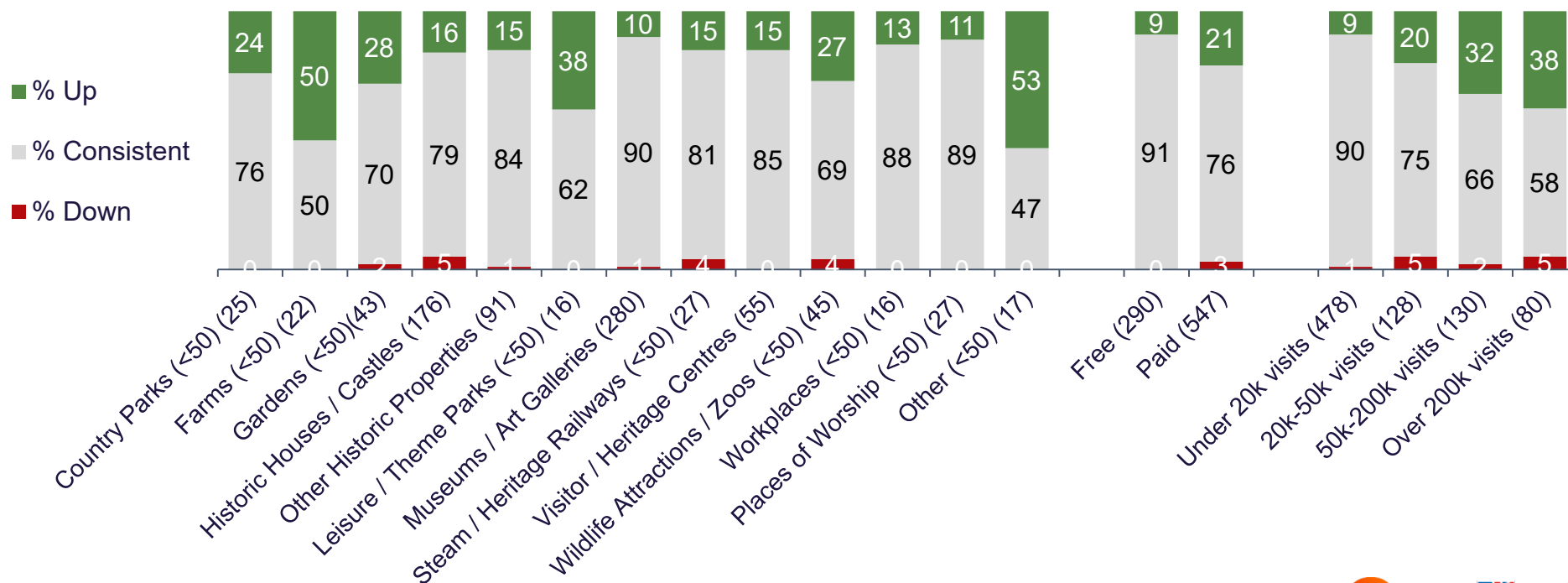
<50 Base size below 50 (please treat with caution)

Seasonal Employees: 2022 Predictions

Attractions anticipate further recovery in seasonal staffing in 2022, in particular farms and leisure/ theme parks which often rely more heavily on seasonal staff.

Anticipated increases in seasonal staff use grows with attraction size.

Anticipated change in seasonal employees in 2022



Base: All answering employment questions

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

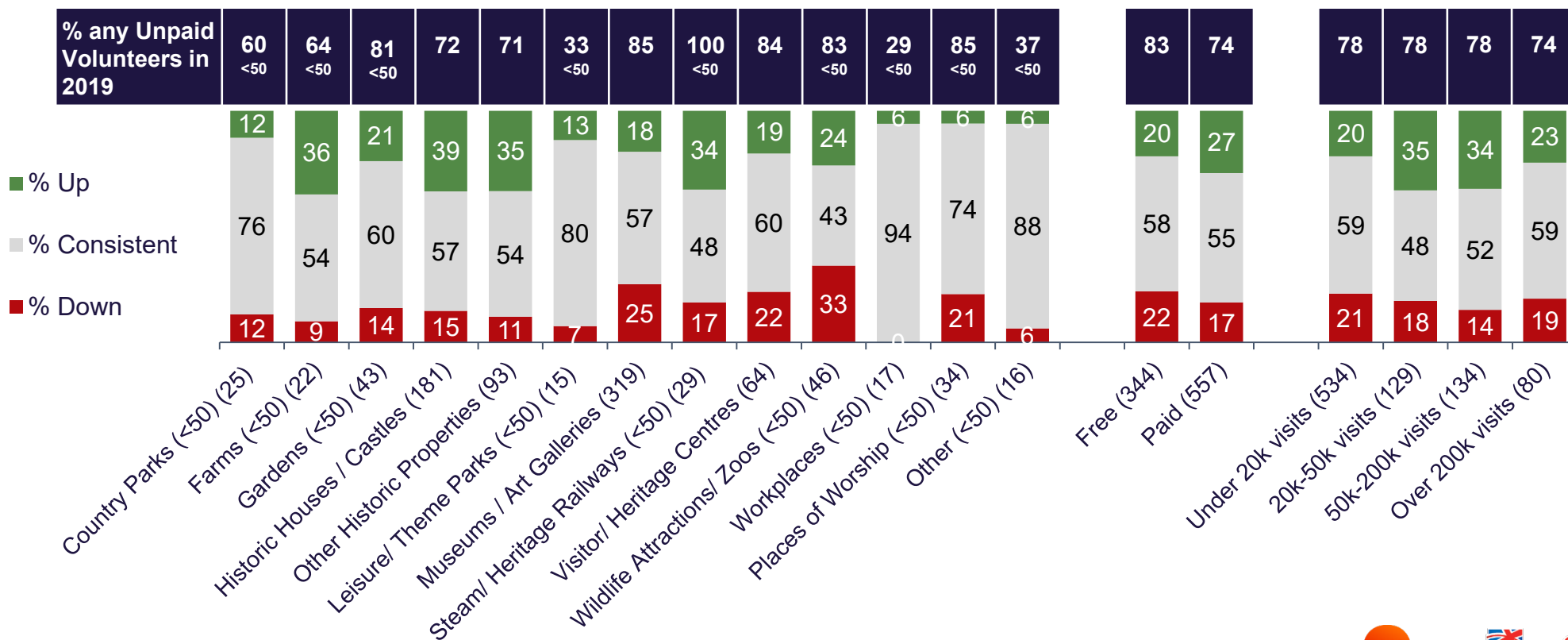
(<50) Base size below 50 (please treat with caution)

Unpaid Volunteers: 2020 – 2021 trends

Unpaid volunteers are essential to the running of many attraction categories with 77% of all attractions using unpaid volunteers, rising to 100% of the steam/ heritage railways responding.

The increase in volunteer participation was particularly marked at historic properties, farms and steam/ heritage railways.

2020/21 Stated change in unpaid volunteers



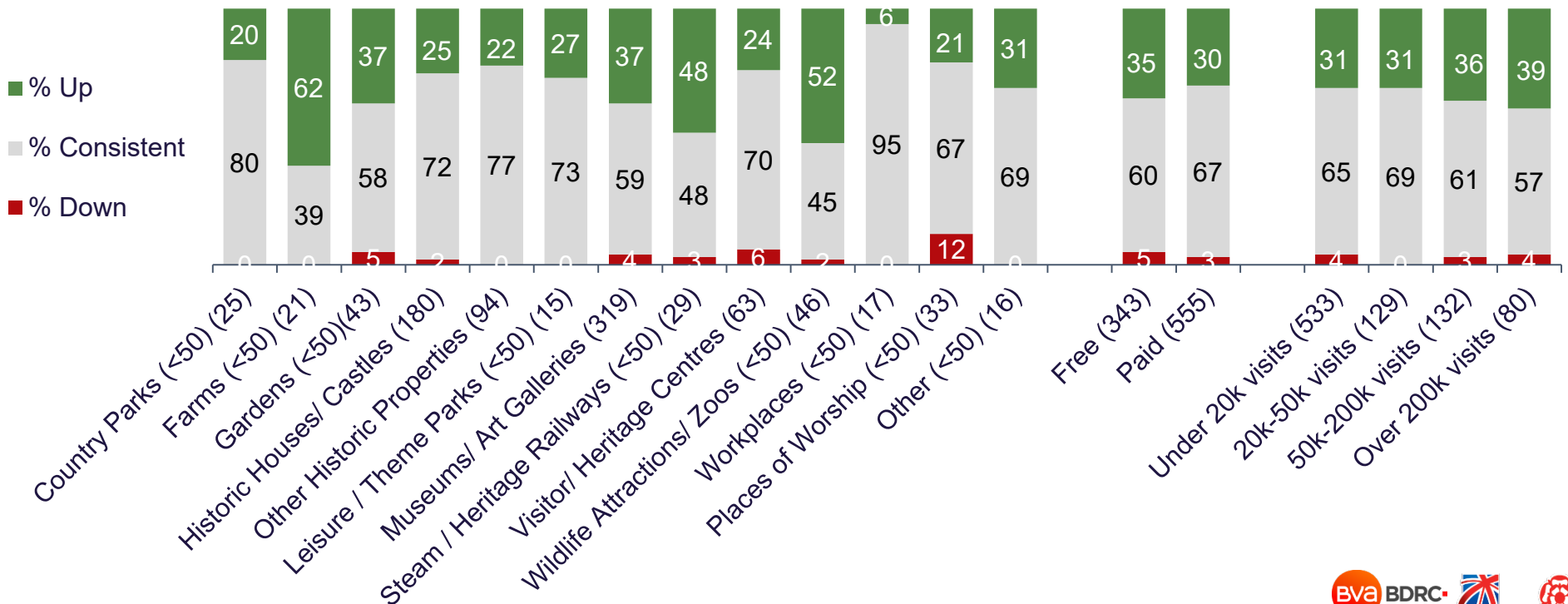
Base: All answering employment questions
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Unpaid Volunteers: 2022 Predictions

Numbers of unpaid volunteers are expected to expand in 2022, with farms, wildlife attractions/ zoos and steam/ heritage railways particularly keen to develop their pool of volunteers.

Anticipated change in unpaid volunteers in 2021



Base: All answering employment questions
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)



VisitBritain



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8. Marketing & communications trends

Marketing Expenditure Trend

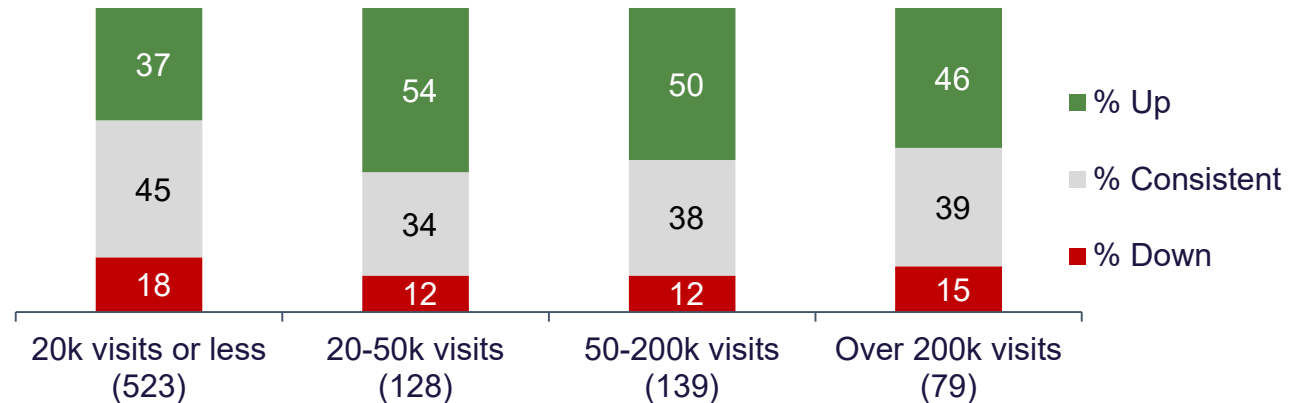
Marketing expenditure increased in 2021, with 43% of attractions reporting an increase in their budgets (compared to their marketing budgets in 2020).

This shift was evident across all attraction sizes; however, for attractions with fewer than 20,000 visitors this suggests more cautious spending at smaller sites, than by sites with 20k+ visitors.

Trend in marketing expenditure



Trend in marketing expenditure by size of attraction



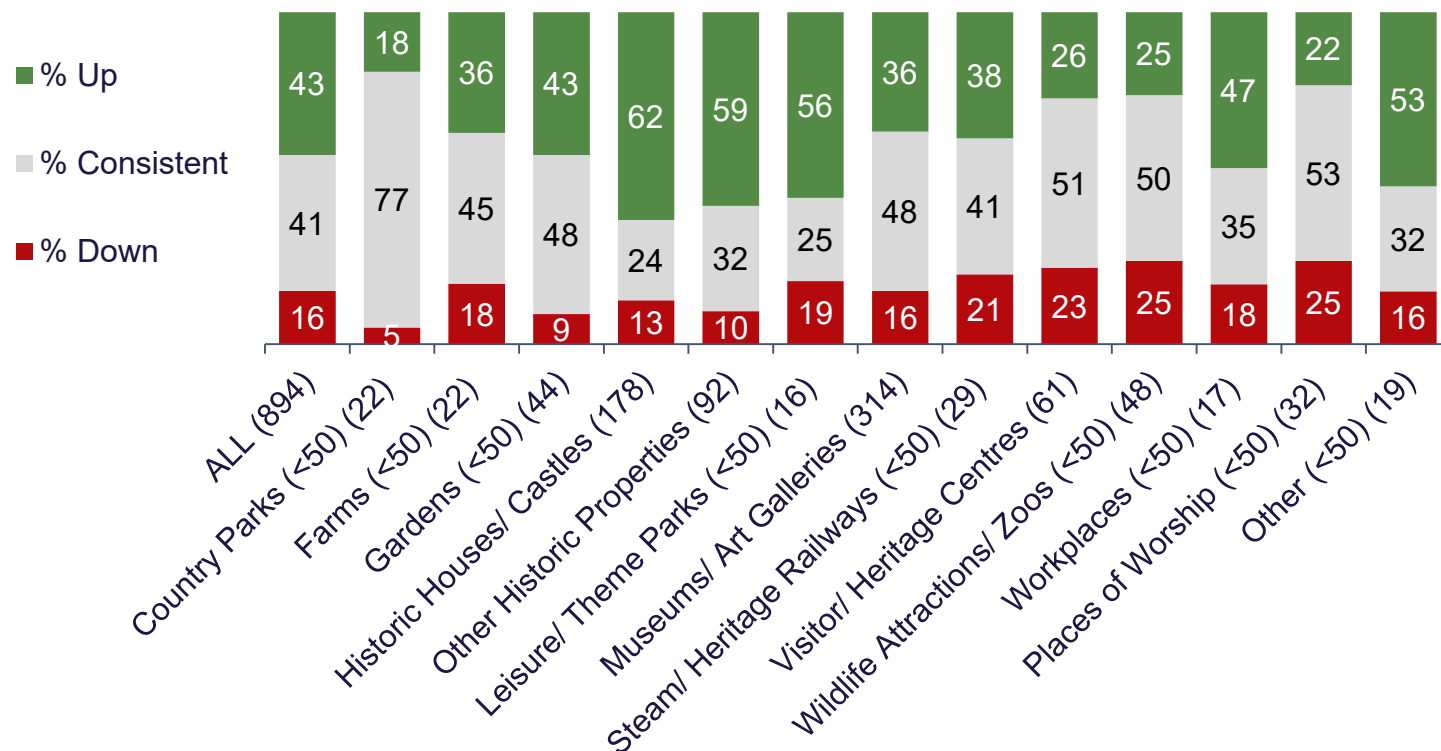
Base: All answering marketing question (894)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Marketing Expenditure Trends 2021: By Attraction Category

Most attraction categories reported higher marketing budgets in 2021, in particular historic properties, leisure/theme parks and 'other' attractions (such as caves and model villages).

The exception is places of worship, where expenditure was slightly more likely to be reduced.

Trend in marketing expenditure by attraction category



Base: All answering marketing question (894)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

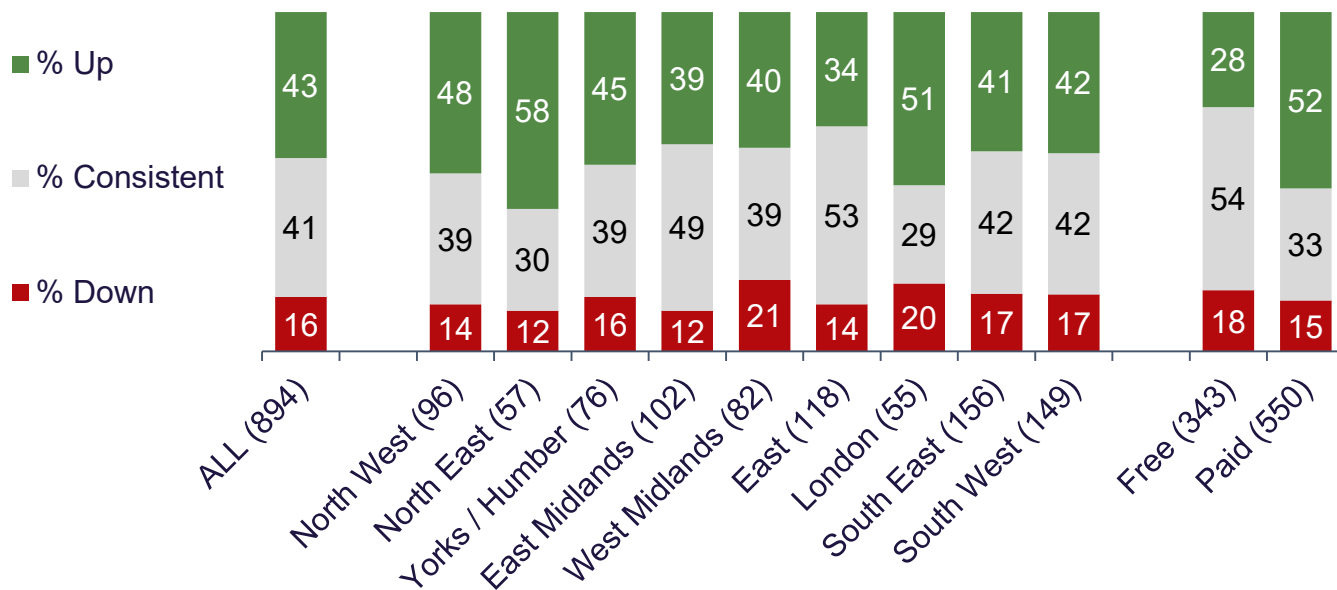
(<50) Base size below 50 (please treat with caution)

Marketing Expenditure Trends 2021: By Region & Admission Charge

Marketing budgets grew across all regions, in particular in the North East (58% of attractions reporting increase of their marketing budget), London (51% reporting increase) and North West (48% reporting increase).

Paid attractions were almost twice as likely to increase their marketing expenditure than free attractions, with 52% of paid attractions increasing the marketing budget compared with just 28% of free attractions.

Trend in marketing expenditure by region and admission charge



Base: All answering marketing question (894)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Digital Communications Offered

Use of social media is now almost universal amongst attractions with more than 10,000 visitors (98%), and 86% of smaller attractions have followed suit in using one or more social media platforms, or mobile apps.

Facebook (89%) continues to dominate but its penetration as a tool for attractions has plateaued, and while Twitter is still used by 61% of attractions this is a decline of 6% compared with 2019.

Use of Instagram/ Pinterest and 'other' social media continues to rise. 31% used 'other' social media, an 11% increase on 2019, while the 62% using Instagram/ Pinterest is a 5% rise compared with 2019.

Digital communication channels trend

	% offered in 2021	% offered in 2020	% offered in 2019
ANY Social/apps	92	90	90
Facebook page	89	88	87
Twitter account	61	64	67
Instagram/ Pinterest	62	60	57
E-newsletter	55	51	51
YouTube	39	41	33
Other social media	31	25	20
Mobile apps	19	18	17

Digital Communication channels by attraction size

% offered	10k or less (382)	10k-20k (118)	20k-100k (212)	Over 100k (158)
ANY Social/ apps	86	98	97	98
Facebook page	82	97	96	97
Twitter account	44	77	77	78
Instagram/ Pinterest	43	75	79	85
E-newsletter	41	67	68	72
YouTube	25	49	48	58
Other social media	20	42	42	35
Mobile apps	9	23	28	23

Digital Communications Offered in 2021: By Attraction Category

The top two digital communication channels for all categories are Websites and Facebook; the additional offerings differ across attraction category, with most having either Instagram/ Pinterest or Twitter as the third most offered digital channel for communication.

Digital communication channels offered by attractions category

% offered	Country Parks (^{<50}) (24)	Farms (^{<50}) (22)	Gardens (^{<50}) (44)	Historic houses / castles (184)	Other historic (96)	Leisure / theme parks (^{<50}) (17)	Museum / art galleries (346)	Steam / heritage railways (^{<50}) (29)	Visitor / heritage centres (65)	Wildlife / zoos (^{<50}) (51)	Work-places (^{<50}) (18)	Places of Worship (^{<50}) (34)	Other (^{<50}) (20)
ANY	100	100	98	98	96	100	98	100	94	100	100	97	100
Facebook	96	100	93	92	96	100	85	97	82	100	78	82	80
Twitter account	46	55	68	82	71	53	54	48	38	75	44	50	65
E-newsletter	42	55	59	71	65	65	49	55	48	51	50	47	35
Instagram/ Pinterest	54	91	86	85	66	88	51	45	45	67	67	41	55
YouTube	8	36	18	58	55	47	34	31	23	41	28	38	25
Mobile apps	19	9	2	50	43	29	5	7	6	8	*	3	10
Other social media	17	18	16	51	48	41	23	14	20	31	39	12	35
Website	100	100	95	98	96	100	95	100	91	96	94	97	100
Online booking	63	82	66	77	66	71	41	59	34	69	50	44	70

Base: All answering digital communications question (950)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* % change is under 1%, therefore not shown

(^{<50}) Base size below 50 (please treat with caution)

Marketing & Content Activities: By Admission Charge

The periods of lockdown during 2020 and 2021 provided the opportunity for sites to develop online content. For most this was used as a means of engaging existing audiences during lockdowns and to reach out to new audiences, through the provision of free content such as online tours/ videos (36%), home-schooling/ family content (30%), online learning (26%) and digitised collections (25%).

Provision of paid online content was fairly rare, even amongst paid attractions. However, 32% developed an online retail offer to help grow their revenue.

Use of augmented reality on site remains niche, with online 2% of attractions investing in this by the end of 2021.

Marketing & content attractions put in place to engage with their audiences during the pandemic

	%	2021	Free (361)	Paid (570)
Online tours/ video content - for free	36	36	30	40
Home-schooling/ family content – for free	30	30	24	33
Online learning (schools/adults) – for free	26	26	21	30
Online tours/ video content – at a cost	6	6	5	7
Home-schooling/ family content – at a cost	3	3	2	4
Online learning (schools/adults) – at a cost	9	9	7	10
Developed online retail offer	32	32	19	39
Digitised collections	25	25	19	29
Used augmented reality on site	2	2	3	2
None of these	34	34	35	33

Base: All attractions answering marketing activities question (931)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Marketing & Content Activities in 2021: By Attraction Size

Larger attractions have more resources and so were more likely to be able to develop content than smaller sites. In total 78% of attractions with over 100,000 visitors a year engaged in any of the listed activities, versus only 58% of sites with less than 10,000 visitors.

Marketing & content attractions put in place to engage with their audiences during the pandemic

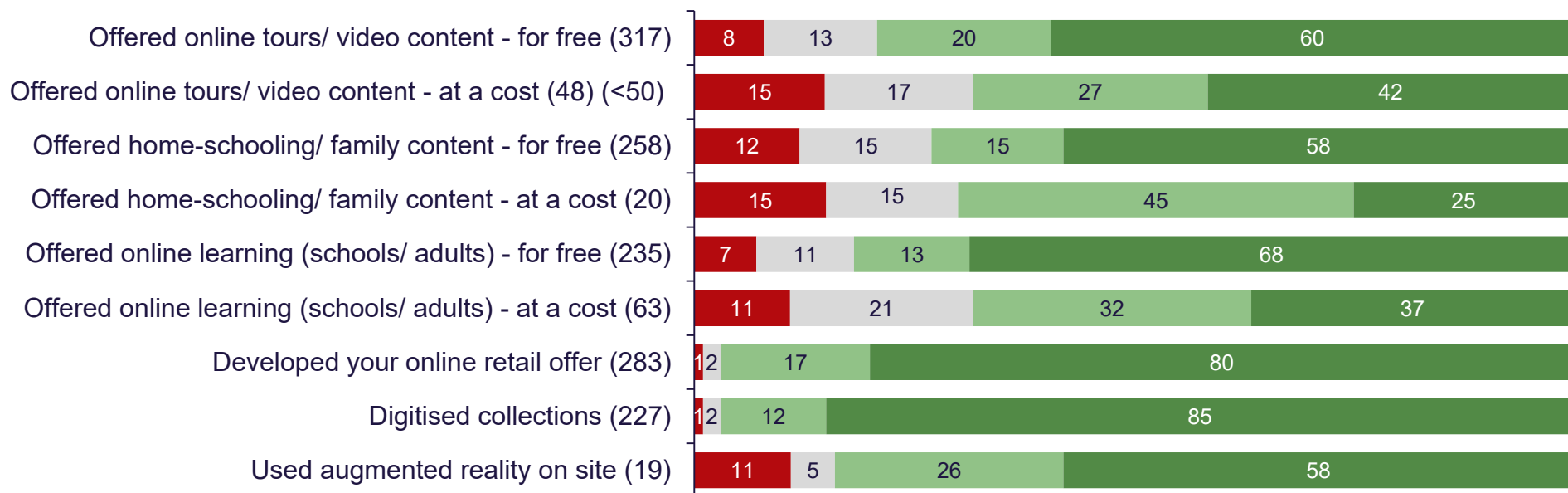
%	All	10k or less p.a. (331)	10k - 20k p.a. (122)	20k - 100k p.a. (258)	Over 100k p.a. (203)
Online tours/ video content - for free	36	21	41	44	50
Home-schooling/ family content – for free	30	16	29	38	45
Online learning (schools/adults) – for free	26	16	27	36	34
Online tours/ video content – at a cost	6	4	7	7	10
Home-schooling/ family content – at a cost	3	0	2	6	5
Online learning (schools/adults) – at a cost	9	4	10	10	16
Developed online retail offer	32	19	35	37	45
Digitised collections	25	19	24	33	27
Used augmented reality on site	2	1	1	3	5
None of these	34	42	32	33	22

Continuation of Marketing & Content Activities

The majority of content and marketing initiatives developed in response to the pandemic will be maintained, and most will be further developed. This is particularly true for online retail and digitised collections.

Future intentions for marketing and content developments post pandemic [%]

■ Will stop offering ■ Unsure whether this will be maintained ■ Will keep as is ■ Will keep and further develop



Base: All attractions offering each type of content

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Impact of Marketing & Content Activities

There is evidence that marketing activities helped to support revenue growth in 2021.

Provision of free content actually had more impact on revenue than paid content – most likely because this reached more people – so it would be advisable for sites to focus on provision of free content where resource will not stretch to both.

Impact of marketing activities on business performance

2020/21 % change in...	% change in gross revenue
Offered any FREE online content	+122%
Did not offer any FREE online content	+75%
Offered any PAID online content	+81%
Did not offer any PAID online content	+76%
Developed online retail offer	+116%
Did not develop online retail offer	+81%



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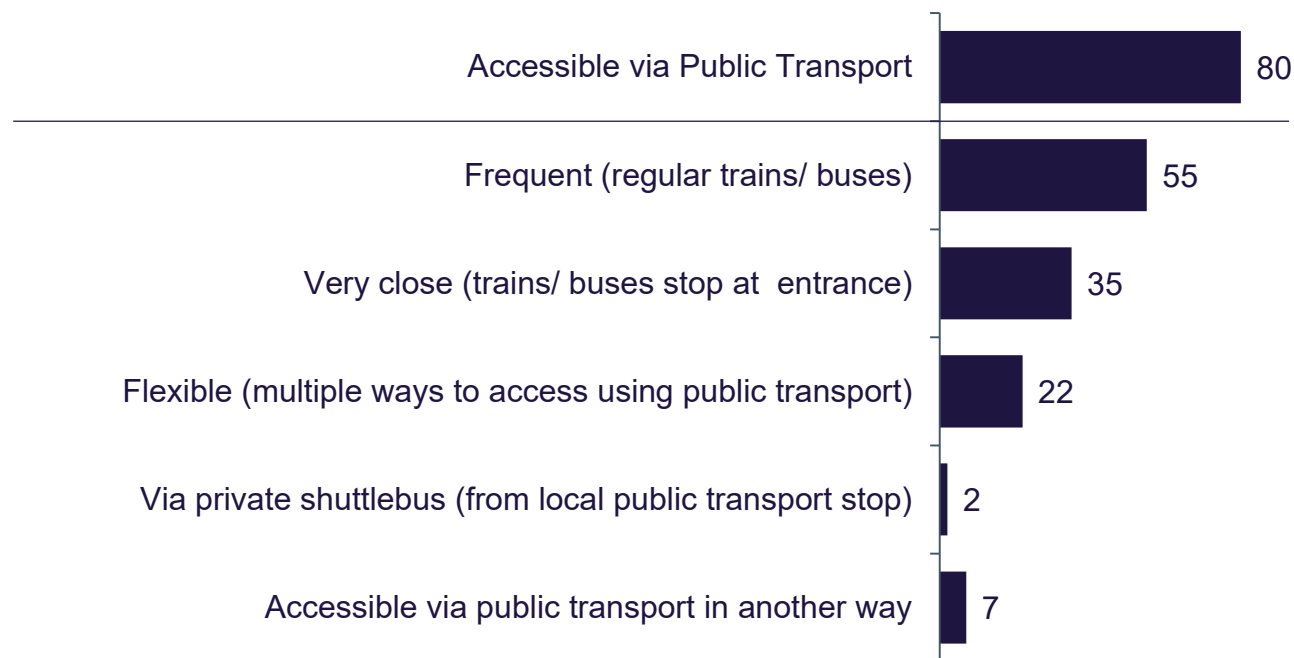
9. Access via public transport

Access to site via public transport in 2021

While a majority of attractions in England are accessible via public transport, **20% of attractions are currently inaccessible via train or bus**, with no or minimal progress since 2019.

55% of all attractions are supported by frequent trains/ buses but these do not always stop at the attraction entrance. Buses/ trains only stop near the entrance of 35% of all attractions, so for the remaining sites, it is important to consider the onward journey for visitors with mobility needs.

Level of access for sites accessible via public transport in 2021 [%]

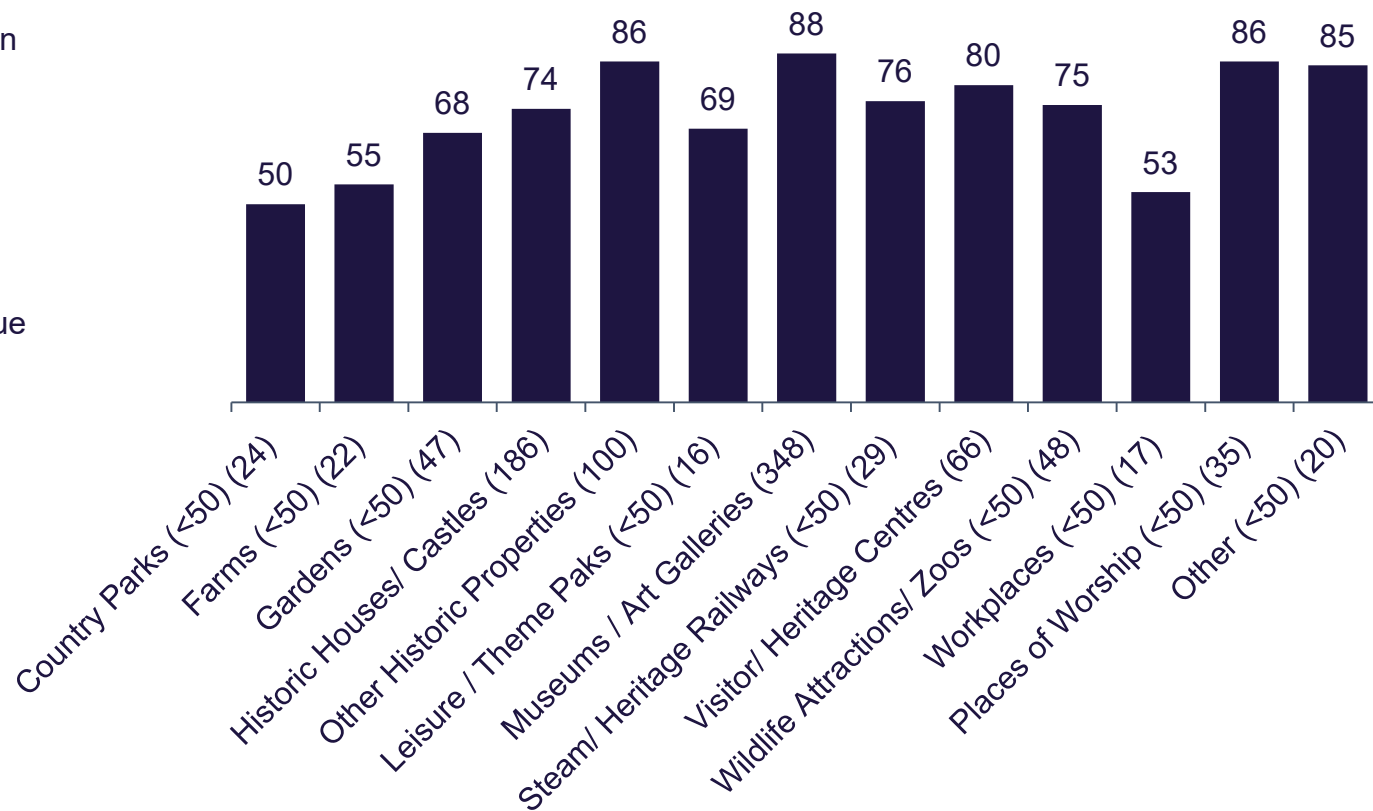


Access to site via public transport in 2021: By attraction category

'Museums and art galleries', 'other historic properties' and 'places of worship' have the best access (88% 86% and 86% of sites, respectively, can be reached via public transport).

However, nearly half of some attraction categories (country parks, workplaces and farms) are inaccessible by public transport. Please treat this finding with caution due to the low base sizes for these categories.

% of sites with access via public transport, by attraction category



Base: All answering additional site access by public transport question (958)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)

Public transport access detail: By attraction category

% of sites that can be accessed via public transport: by attraction category

Public transport access to this site is... [%]	Country Parks ^{<50} (24)	Farms ^{<50} (22)	Gardens ^{<50} (47)	Historic houses / castles (186)	Other historic properties (100)	Leisure / theme parks ^{<50} (16)	Museums / art galleries (348)	Steam / heritage railways ^{<50} (29)	Visitor / heritage centres (66)	Wildlife / zoos ^{<50} (48)	Workplace ^{<50} (17)	Places of Worship ^{<50} (35)	Other ^{<50} (20)
Frequent (regular trains/buses)	29	41	36	48	56	25	65	54	55	40	20	74	55
Very close (trains/ buses stop at the site entrance)	25	32	28	36	39	31	40	54	23	29	27	24	45
Via private shuttlebus (from local public transport stop)	0	0	6	1	3	12	2	0	0	2	0	0	0
Flexible (multiple ways to access using public transport)	0	14	6	16	33	25	26	18	20	8	13	21	35

Base: All sites answering site access by public transport question (958)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

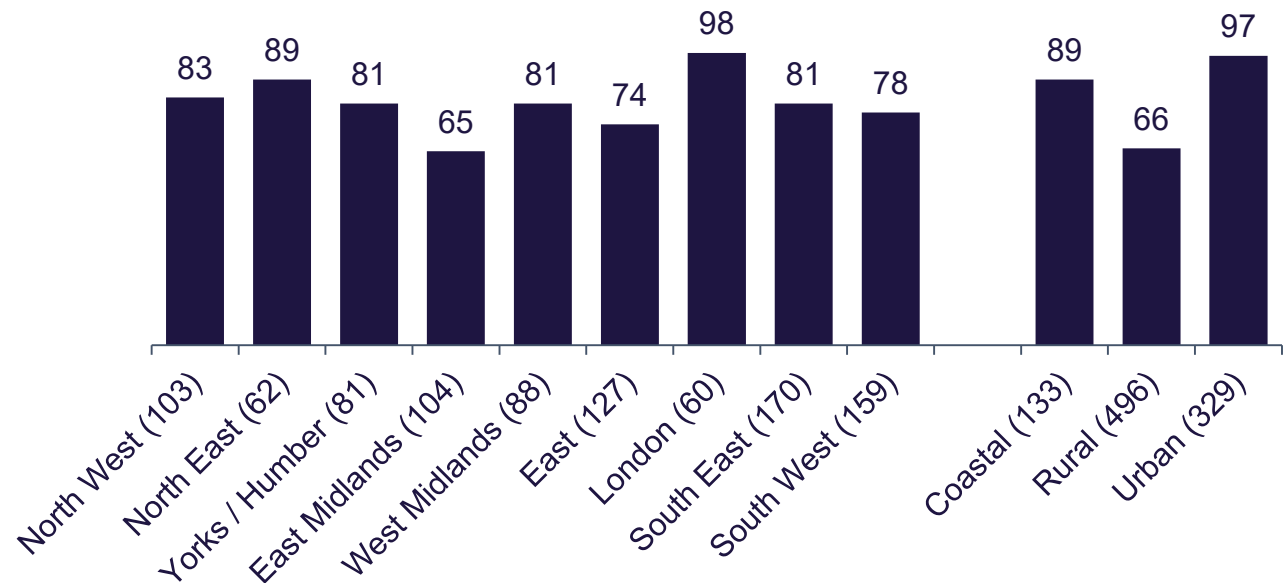
^{<50} Base size below 50 (please treat with caution)

Access to site via public transport in 2021: By Region & Area type

% of sites with access via public transport, by region and area type

Regions with the highest proportion of accessible attractions via public transport are London (98%), and the North East (89%). The East Midlands has the lowest proportion of attractions that are easily accessible via public transport (65%).

Rural areas have the lowest proportion of sites accessible via public transport (66%). Meanwhile, the large majority of attractions in coastal and urban areas are accessible (97%).



Public transport access detail: By Region & area type

% of sites that can be accessed via public transport: by region and area type

Public transport access to this site is... [%]	North West (103)	North East (62)	Yorks / Humber (81)	East Midlands (104)	West Midlands (88)	East (127)	London (60)	South East (170)	South West (159)	Coastal (133)	Rural (496)	Urban (329)
Frequent (regular trains/ buses)	65	66	48	38	57	49	92	56	46	66	34	81
Very close (trains/ buses stop at the attraction entrance)	36	43	36	27	32	33	57	32	37	34	26	49
Via private shuttlebus (from local public transport stop)	1	4	3	2	0	3	2	2	1	4	1	1
Flexible (multiple ways to access using public transport)	27	28	19	12	23	16	71	20	9	20	9	38

Base: All sites answering site access by public transport question (958)

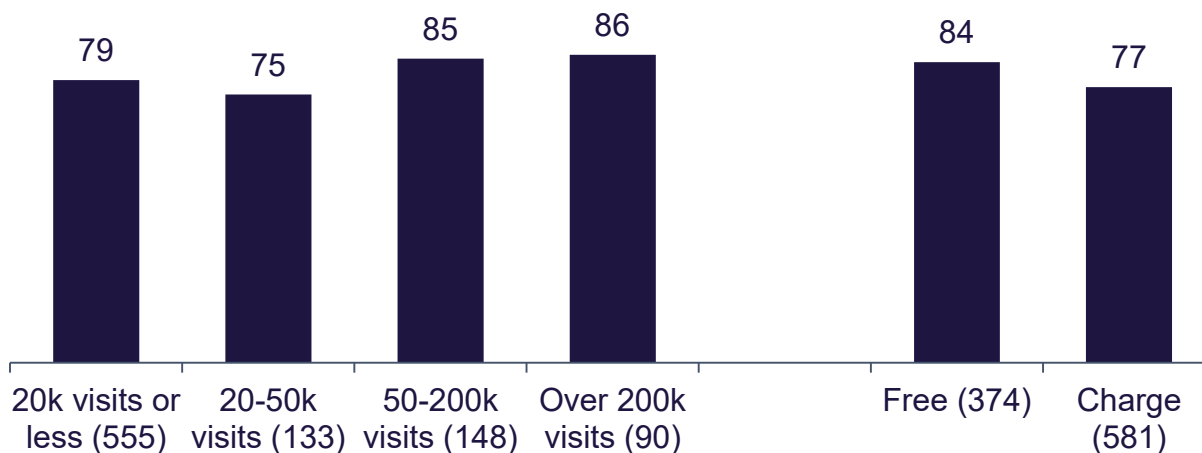
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Access to site via public transport in 2021: By Attraction Size & Admission Charge

Sites attracting over 50,000 visitors are more likely to be accessible via public transport (85%). In contrast, only 78% of smaller sites are easily accessible via public transport.

Free attractions are more likely to be accessible via public transport (84%) than those that charge for entry (77%).

% of sites with access via public transport, by attraction size and Admission charge



Public transport access detail: By Attraction Size & Admission Charge

% of sites that can be accessed via public transport: by attraction size and admission charge

Public transport access to this site is... [%]	20k visits or less (555)	20-50k visits (133)	50-200k visits (148)	Over 200k visits (90)	Free (307)	Paid (349)
Frequent (regular trains/ buses)	55	56	57	58	64	49
Very close (trains/ buses stop at the attraction entrance)	32	41	42	46	36	35
Via private shuttlebus (from local public transport stop)	2	2	3	3	1	2
Flexible (multiple ways to access the site using public transport)	20	22	23	31	24	19

Base: All sites answering site access by public transport question (958)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.



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10. Sustainability

Sustainability strategy: By attraction category

Historic properties are the most likely to have a formal environmental business strategy in place (75%) and a budget to support this (59%), but this is driven by the number of National Trust and English Heritage sites; Museums and galleries are the category least likely to have any formalised plans around sustainability.

Formal prioritisation of sustainability, by attraction category [%]

[%]	Country Parks (<50) (24)	Farms (<50) (22)	Gardens (<50) (44)	Historic houses / castles (184)	Other historic (96)	Leisure / theme parks (<50) (17)	Museum / art galleries (346)	Steam / heritage railways (<50) (29)	Visitor / heritage centres (65)	Wildlife / zoos (51)	Work-places (<50) (18)	Places of Worship (<50) (34)	Other (<50) (20)
Have an environmental business strategy	47	53	63	76	72	45	36	45	51	67	75	40	71
Have a budget to help meet environmental objectives	35	11	37	58	60	18	17	10	29	48	25	16	29
Neither	41	42	29	20	22	36	56	50	31	19	25	44	24

Base: All answering sustainability question (740)

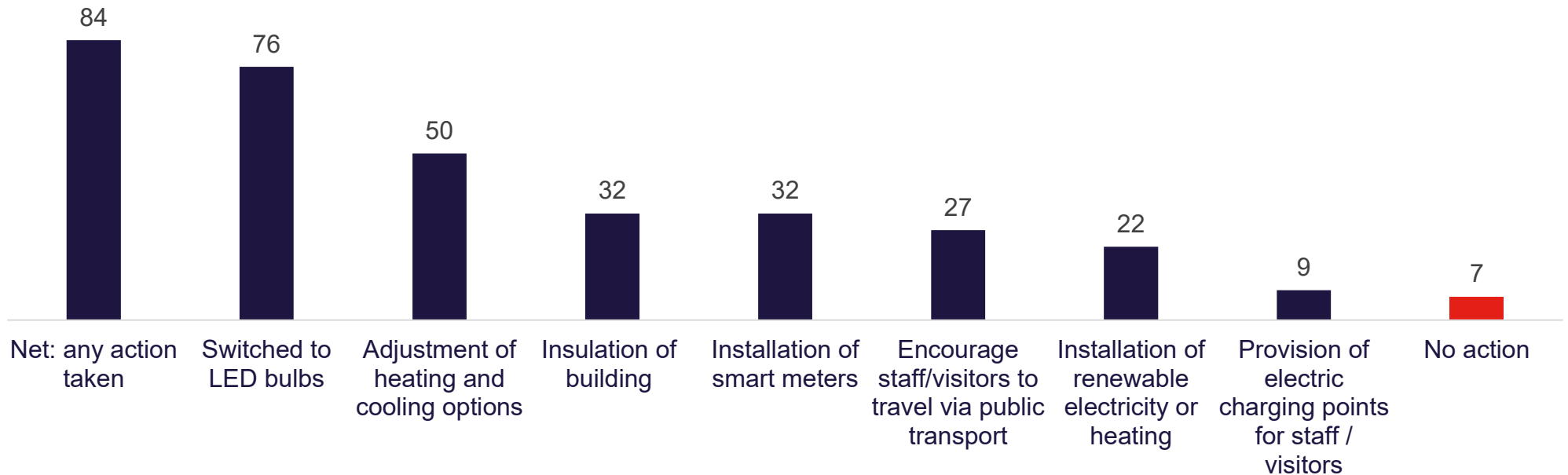
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)

Sustainability action

Most attractions have taken some action on sustainability, regardless of whether or not they have a formal strategy in place. The most common sustainability practices are switching to LED lightbulbs (76%) and adjusting heating/cooling options (50%). Fewer than 1 in 10 attractions are currently providing electric charging points on site.

Actions being taken to reduce carbon emissions [%]



Sustainability action: By Attraction category

Actions being taken to reduce carbon emissions, by attraction category

[%]	Switched to LED bulbs	Adjusted heating and cooling options	Insulation of your building	Installation of smart meters	Encourage staff/visitors to use public transport	Installation of renewable electricity or heating	Provision of electric charging points for staff / visitors
Country Parks (17) ^{<50}	65	35	29	18	6	29	12
Farms (19) ^{<50}	68	37	26	16	21	47	16
Gardens (35) ^{<50}	73	45	30	21	30	45	18
Historic Houses / Castles (175)	87	70	55	58	23	21	8
Other Historic Properties (80)	81	54	51	55	23	13	3
Leisure / Theme Parks (11) ^{<50}	82	45	27	27	36	45	18
Museums / Art Galleries (254)	71	39	16	19	29	16	4
Steam/Railways (21) ^{<50}	76	48	14	24	48	24	19
Visitor / Heritage Centres (46) ^{<50}	65	48	28	15	30	30	15
Wildlife Attractions / Zoos (42) ^{<50}	79	50	33	31	31	38	21
Workplaces (13) ^{<50}	92	69	54	15	15	46	46
Places of Worship (25) ^{<50}	64	40	4	12	20	8	4
Other (16) ^{<50}	63	44	25	25	31	19	19

Base: All answering sustainability action to reduce carbon emissions question (752)

^{<50} Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Sustainability Action: By Attraction Size and Admission Charge

As we might expect, larger attractions have generally taken more action than smaller ones, in particular when it comes to installation of renewable energy (Over 100k visits a year: 41%, under 20k visits: 14%) and provision of electric charging points (Over 100k visits a year: 25%, under 20k visits: 4%).

Paid sites are more likely to have taken action to reduce energy consumption at their sites compared with free sites.

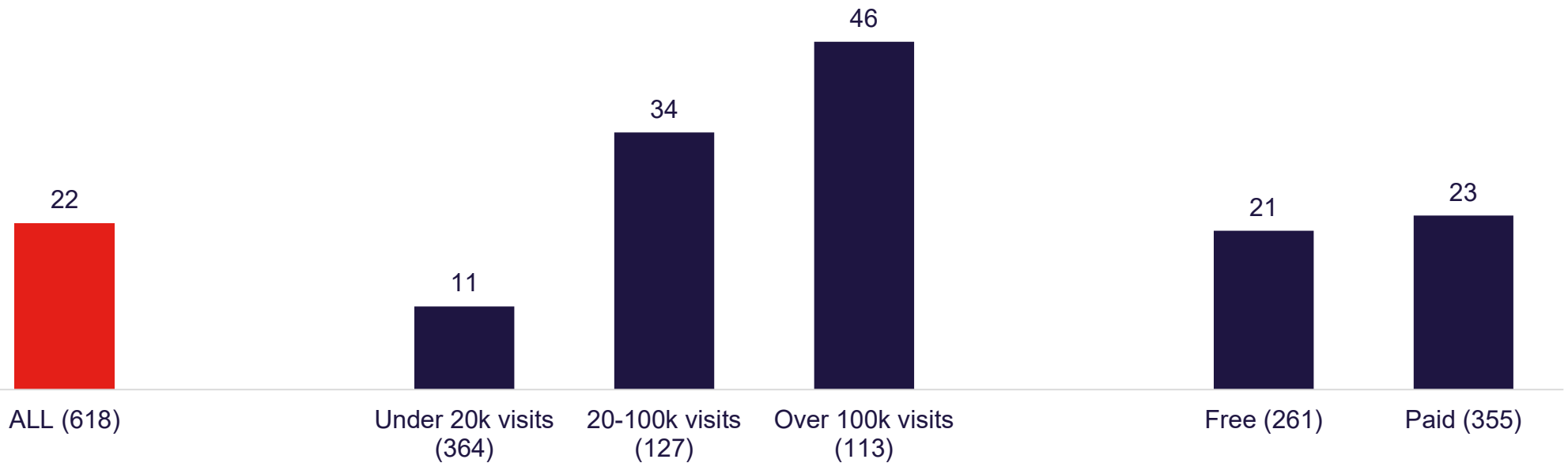
Actions being taken to reduce carbon emissions, by attraction size and admission charge

[%]	Switched to LED bulbs	Adjusted heating and cooling options	Insulation of your building	Installation of smart meters	Encourage staff/visitors to use public transport	Installation of renewable electricity or heating	Provision of electric charging points for staff / visitors
Under 20k visits (436)	72	43	25	28	21	14	4
20-100k visits (173)	86	58	42	39	33	27	10
Over 100k visits (122)	72	58	39	36	41	41	25
Free (275)	67	36	18	19	26	19	8
Paid (474)	81	58	41	40	27	24	10

Learning about Sustainability: By Attraction Size and Admission Charge

Over a fifth of attractions offer means for visitors to learn about sustainability through their exhibitions and signposting. There are notably no differences in this respect between free and charging attractions, but large attractions are far more likely to provide learning opportunities on site than smaller attractions (over 100k visits: 46%, under 20k visits: 11%).

% of attractions providing opportunities for visitors to learn about sustainability through signposting/ temporary exhibitions, by attraction size and admission charge



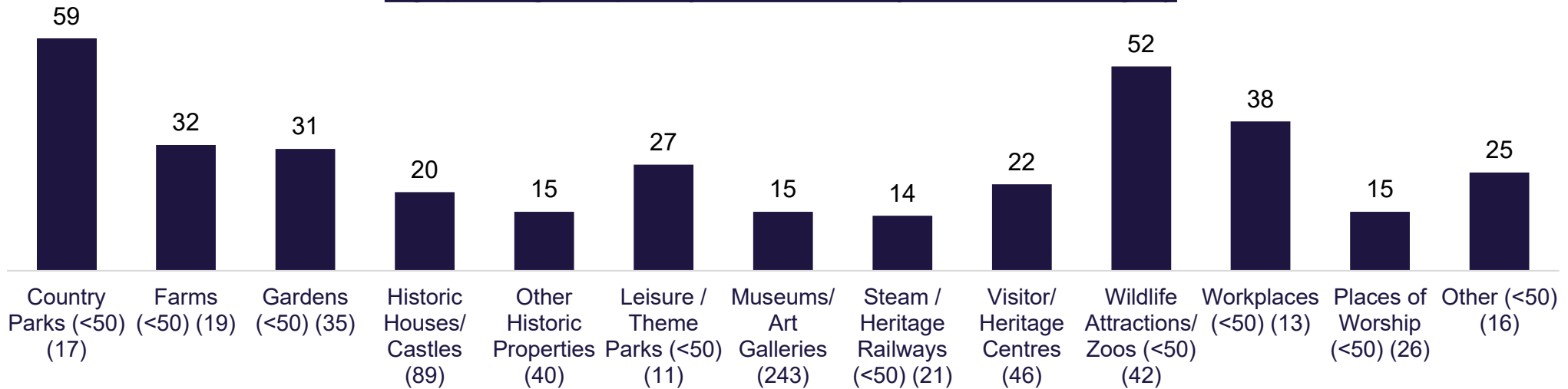
Base: All answering question about providing opportunities for learning about sustainability (618)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Learning about Sustainability: By Attraction category

Outdoor attractions are more likely to provide opportunities for visitors to learn about sustainability during their visit, in particular Country Parks (59%) and Wildlife Attractions/ zoos (52%).

% of attractions providing opportunities for visitors to learn about sustainability through signposting/ temporary exhibitions, by attraction category



Base: All answering question about providing opportunities for learning about sustainability(618) ^{<50} Base size below 50 (please treat with caution)

N.B. Figures in brackets represent sample sizes of attractions upon which data is based.



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11. Appendix

Attraction category examples

Attraction Category	Examples
Castle / Fort	Fort, Citadel, Defence Tower
Country Park	Forest Park (N.B. to qualify as an attraction they should include another attraction such as a visitor centre, botanical garden or historical monument)
Distillery/ Vineyard/ Brewery	Cider Farm, Alcohol Centred Attraction
Garden	Arboretum, Botanical Garden
Heritage/ Visitor Centre	Information/Orientation Centre, Park Ranger Centre, Heritage/Cultural Interpretation Centre
Historic House/ House and Garden/ Palace	House and Garden, Royal Residence
Historic Monument / Archaeological Site	Ancient Monument, Standing Stones
Place of Worship	Attractions of any religion that are <u>still in use</u> as places of worship, Churches, Chapels N.B. worshippers <u>should</u> be included in visitor numbers if possible.
Other Historic Property	Historic Ship, Lighthouse, Windmill, Watermill, Historic Workplace
Leisure/ Theme Park	Entertainment Park, permanent funfair
Museum/ Art Gallery	Including Industrial, Mining, Science, Transport Museums, and Galleries of Modern Art. N.B. Art centres, galleries and antique centres whose primary purpose is retail are not classified as 'attractions' for the purpose of this survey.
Farm/ Rare Breeds/ Farm animals	Attractions involving enclosed farm animals
Nature Reserve/ Wetlands/ Wildlife trips	Attractions that contain natural habitat environments for fauna, birds and wildlife, including wildlife trips i.e. seal/dolphin watching
Safari Park/ Zoo/ Aquarium/ Aviary	Attractions involving enclosed wild animals/birds/reptiles/insects etc
Steam/ Heritage Railway	Steam or heritage railways in working condition (not museum)
Other Historic/ scenic transport operator	Chair lift, cable car, sightseeing boat
Industrial/ Craft Workplace	Operating Industrial or craft attraction
Science/ Technology Centre	Science, Technology or Environmental Centres that are not museums
Other	Cave, model village, pier, sports stadium tour, waxworks

Questionnaire: Attraction Details

1.1 In past years, your main attraction category was:

Is this correct? Yes / No (If no or missing, please tick below the main category to be used for analysis.)

Castle / Fort

Country Park

Distillery / Vineyard or Brewery

Garden

Heritage / Visitor Centre

Historic House / House and Garden/ Palace

Historic Monument / Archaeological Site

Place of Worship (still in use)

Other Historic Property

Leisure / Theme Park

Museum and / or Art Gallery

Farm / Rare Breeds / Farm Animals

Nature Reserve / Wetlands / Wildlife Trips

Safari Park / Zoo / Aquarium / Aviary

Steam / Heritage Railway

Other Historic / Scenic Transport Operator

Industrial / Craft Workplace

Science / Technology Centre

Other (*Please specify below*)

1.2 Which of these best describes the area of your attraction? Coastal / Rural / Urban

Questionnaire: Visitors

2.1 For 2020, your organisation provided us with total visitor numbers (paid and free) of:

Is this correct? Yes / No

If no or missing, please indicate the correct 2020 visitor numbers:

2.2 What were your visitor numbers during the 2021 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).

Total visitor numbers (paid and free) **Are these numbers:** Exact? / An Estimate?

2.3 What percentage of total visitors in 2021 (paid and free) fell into each category? Adults % / Children % = Total 100%

2.4 For 2020, your organisation provided us with a total number of schoolchildren visits of:

Approximately how many schoolchildren visited your attraction as part of an organised group in 2021?

Number of schoolchildren **Is this number:** Exact? / An Estimate?

2.5 Did you charge for admission to the main attraction in 2021? No / Yes

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2021 (including VAT):

Adult / Child

2.7 Origin of Visitors: For 2020, your organisation provided us with a percentage of visitors from overseas of %

(a) What percentage of total visitors in 2021 do you estimate were from overseas? %

(b) For 2019, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2021 do you estimate lived locally or within day trip distance of your attraction? %

ii) Compared with 2020, was the number of visitors living locally or within day trip distance in 2020: Up / Down / Similar

2.8 i) What percentage of your total visitors in 2021 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %

ii) Compared with 2020, was the number of family group visitors in 2021:

Up / Down / Similar

Questionnaire: Marketing, Public transport

3.1 Gross revenue

a) How did the attraction's gross revenue in 2021 compare with 2020?

Up / Down / Similar

b) What was the percentage increase / decrease? %

3.2 Compared with 2020, was expenditure on marketing activities in 2021:

Up / Down / Similar

3.3 Which of the following digital communications did your main attraction offer in 2021?

Website / Online booking facility (tickets, events) / Facebook page / Instagram/Pinterest / E-newsletters / Twitter account / Mobile apps / YouTube / Other social media / None of these

3.4 National lockdowns aside, was your main attraction closed for any other reasons in 2020?

Open all year round (aside from national lockdowns)

Closed for part of the year– regular seasonal closure

Closed for part of the year– as not profitable to open

Closed for part of the year– for refurbishments/ repairs

Closed for part of the year– for refurbishments/ repairs brought forward due to COVID

Closed for part of the year– insufficient staff/ volunteers

Closed for part of the year– difficulties in making the site COVID safe

Closed for other reason not specified here

3.5 Can your site be accessed via public transport?

Yes/ No

3.6 IF YES: Public transport access to this site is... (please code all that apply)

Frequent regular trains or buses/ Very close (trains or buses stop at the attraction entrance)/ Via private shuttle bus (from local public transport)/

Flexible (there are multiple ways to access the site using public transport)/ none of these

Questionnaire: Human Resources

4.1 Compared with 2020, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2021 (including yourself, working owners and self employed)...?:

Permanent: Up / Down / Similar / None

Seasonal: Up / Down / Similar / None

Unpaid volunteers: Up / Down / Similar / None

4.2 And compared with 2021, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2022 to be:

Permanent: Up / Down / Similar / None

Seasonal: Up / Down / Similar / None

Unpaid volunteers: Up / Down / Similar / None

4.3 Are you back to pre-pandemic staffing levels?

Yes/ No/ Don't know

Questionnaire: Impact of COVID (1/3)

5.1 What was the maximum capacity that your site reached in 2021, as a percentage of the maximum capacity in 2019? This could have been reached at any point during the year.

[Enter %]

5.2 [if 5.1 less than 100%] Do you intend to increase capacity back to 2019 levels when it is safe to do so? Yes/ No

5.3 During 2021 did you require visitors to pre-book visits to your site?

Yes – visitors were only allowed in if they pre-booked their tickets / Yes – but some walk ups were permitted where capacity allowed / No

5.4 [if 1 or 2 at Q5.3] will you continue to use pre-booking system when restrictions on visitor numbers are lifted?

Yes – we plan to require pre-booking for all visitors

Yes - we will keep the online pre-booking system, but also allow some walk-ups

Don't know yet

No

5.5 Does your attraction have an online booking system?

Yes – introduced in 2021 / Yes – introduced in 2020 / Yes – introduced in 2019 or before / No

5.6 Comparing 2021 with 2019, did you see the overall revenue from donations increase, stay the same or decrease?

Increased / Stayed the same / Decreased / We do not request/ accept donations

5.7 Comparing 2021 with 2019, did you see the level of gift aid received from tickets, memberships and donations increase, stay the same or decrease?

Increased / Stayed the same / Decreased / We do not qualify for/ request gift aid

5.8 Did your organisation seek any additional funding during 2021, over and above what you would expect to receive in a typical year?

Yes, and we were able to secure what we needed / Yes, and we were able to secure part of what we needed / Yes, but we were unsuccessful in securing funding / No, we did not seek any additional funding

Questionnaire: Impact of COVID (2/3)

5.9 Are you aware of any of the following funding sources? You can see a description of each by hovering your mouse over the funding type.

Crowdfunding / Peer to peer lending / Community shares / Mezzanine finance / Impact investment funds / Social Impact Bonds / Government funding (e.g. grants) / Industry body funding / Bank loans

5.10 Why didn't you use [INSERT FUNDING TYPE FROM 5.9 if selected]?

I don't think we qualify for this

Don't know enough about this type of funding

Don't know enough about how to apply

Don't have staff/support with the right skills to apply

Prefer to use informal funding channels

Other (please specify)

5.11a What, if anything, has your organisation introduced or developed during the COVID pandemic, in order to engage with your audience and/or develop your revenue streams?

Developed your online retail offer

Offered online tours/ video content - for free

Offered online tours/ video content – at a cost

Offered home-schooling/ family content – for free

Offered home-schooling/ family content – at a cost

Offered online learning (schools/adults) – for free

Offered online learning (schools/adults) – at a cost

Digitised collections

Used augmented reality on site

None of these

Questionnaire: Impact of COVID (3/3)

5.11b Are these developments... [SHOW STATEMENTS SELECTED AT 5.11A IN ROWS]

A temporary offer you switch off when not under pandemic restrictions

A temporary offer that is working but still there is uncertainty if it will be maintained

A permanent offer you intend to maintain as it is currently set up

A permanent offer you intend to keep and further develop

Questionnaire: Sustainability

5.14 Finally, thinking about sustainability, which of the following apply to your organisation?

We have an environmental business strategy

We have a budget to help meet environmental objectives

None of these

5.15 Which of the following actions, if any, has the site done (or is it currently doing) to reduce carbon emissions?

Adjustment of heating and cooling options

Installation of smart meters

Installation of renewable electricity or heating

Provision of electric charging points for staff / visitors

Insulation of your building

Switching to LED bulbs

Encouragement of staff/visitors to travel via public transport

Not sure

Nothing

5.16 Do you provide visitors with the opportunity to learn about sustainability through signposting and/or your permanent or temporary exhibitions?

Yes / No / Not sure