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Visitor Attraction Trends in England 2023

July 2024

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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.

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VisitEngland is grateful to Historic England for their financial support for the 2024 survey.



Historic England

Introduction

This report presents the findings of the Survey of Visits to Visitor Attractions in England undertaken by VisitEngland. It provides a comprehensive England-wide analysis of trends plus visits data.

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.”



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2. Headlines

2023 Visitor Attraction Trends

Recovery following the COVID-19 pandemic slowed in 2023, with attractions in England only reporting an 11% increase in total visits from 2022 to 2023, leaving a shortfall against 2019 of 28%.



+8%

The increase in 2023 adult admission fees was lower than the rate of inflation at the end of 2022 (when most prices would have been set).



+10%

The increase in gross revenue in 2023 compared with 2022 reflected the increase in visits and the admission price rise.

Admissions volume for participating attractions

2023 and 2022 visitor volume was provided through the survey

* Previous visitor volume is an estimation based on the sector trends recorded through this research.

	2019	2020	2021	2022	2023
Number of visits	273.75 million*	95.81 million*	124.56 million	176.87 million	196.14 million
Annual % change in visits	/	-65%	+30%	+42%	+11%
% difference from 2019 visit volume	/	-65%	-55%	-35%	-28%

Headlines: Impact of Rising Costs

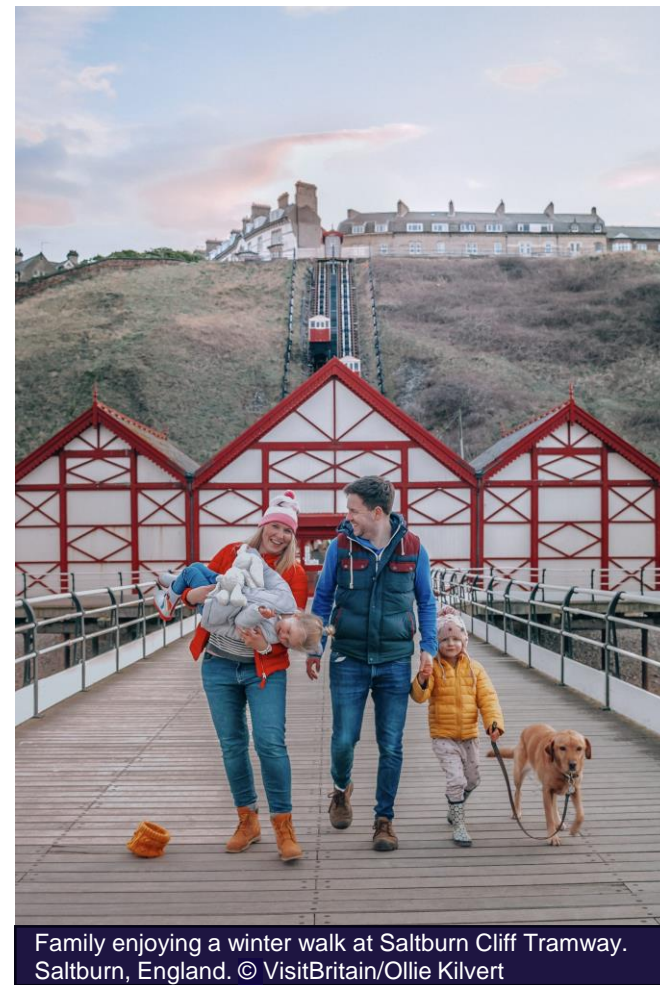
Inflation may have fallen during 2023, but costs continued to rise, affecting the majority of attractions in 2023.

The impact of rising supplier costs was the most wide-reaching with 71% of attractions affected, rising to 9 in 10 of sites with over 100,000 visits a year.

Sites are finding it increasingly difficult to absorb these costs, with nearly half (48%) passing on cost increases to visitors (e.g. through increased catering prices) compared with 41% in 2022.

Rising energy costs also had a significant impact with two thirds of sites affected, in particular larger sites and those charging an entrance fee. Half of large (over 100k visitors a year) and charging sites have passed on these cost increases to visitors, but free sites have typically absorbed the higher rates.

Fewer attractions overall (58%) were affected by rising wages – but this challenge increased with attraction size (and staffing levels).



Headlines: Visit Volume

Admissions to English attractions continued to increase in 2023, but at a slower rate than in the previous two years. Average growth was just 11%, which means that 2023 admissions were 28% below 2019 levels.

Sector growth was fuelled by the return of overseas visitors and an increase in school trips in 2023.

Most attractions also reported a consistent or higher volume of domestic visitors, but the volume of visits fell at a sector level, driven by a decline at large sites (with annual admissions exceeding 200,000).

Most regions saw admissions growth of between 4-8%; the exception was London, which saw volume grow by 26%. London was hit hardest by the COVID-19 pandemic and saw limited recovery in 2021. The return of overseas visitors during 2022 and 2023 bolstered visit volume, leading to

growth levels that far exceeded other regions in these years, though volume remained 22% below 2019 levels.

The East of England was least affected by the pandemic, and has been the quickest to recover, now only 4% behind 2019 levels, as is Yorkshire & The Humber.

The South East and North East are seeing the slowest recovery, at 37% down and 36% down respectively, compared with 2019.

A return to pre-COVID opening hours and the natural return of visitors post-COVID (individuals, schools and groups) underpinned growth across most attraction categories in 2023. However, the highest performing attractions called out specific actions they had taken that boosted visits.

These included:

- Investment in marketing – with more use of social media, and return to use of promotional leaflets
- Community outreach
- Better programming – more/ better/ more targeted events and experiences
- Extending/ enhancing facilities – play areas, tea room, exhibition spaces
- Diversification – actively seeking to attract new audiences through programming

Headlines: Revenue & Admission Pricing

Gross revenue at visitor attractions increased by 10% in 2023. Indexing average levels of revenue growth suggests that this has returned to the growth trajectory it was on prior to the pandemic.

Gross revenue has recovered more quickly than visitor admissions because of above inflationary increases in admission fees, grants and other revenue generating business.

Inflationary increases in staff wages, energy, supplier costs etc. during 2023 will have somewhat offset the higher revenue meaning the impact on profit margins is likely to be more modest.

Adult peak season entrance prices rose by 8% in 2023 to an average price of £11.

82% of charging attractions, charged for child entry, consistent with 2022. In 2023 the average child entry price was £7.17. While still increasing, the inflation for child admission charges was lower – 5% on average.

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.

The average entrance fee for small attractions, with 20,000 visits or less is £8.85 and this rises to £16.28 amongst attractions with over 100,000 visitors a year.



Headlines: Marketing & Digital Communication

Marketing expenditure increased again in 2023, with 31% of attractions reporting an increase compared to their marketing budgets in 2022.

This shift was evident across all attraction sizes but was less marked at smaller sites, with less than 20,000 visits a year.

Marketing budgets grew across all regions. This was most evident in London, where 47% of sites reported an increase – with attractions perhaps investing in marketing to capitalize on the overseas market opportunity.

Use of social media continues to grow, with 95% of visitor attractions using any social media or apps in 2023.

Sites typically use 3 forms of social media, with Facebook (91%) being the most commonly used.

Use of Instagram or Pinterest has grown significantly, with 68% of attractions using one of these platforms in 2023, up from 61% in 2022.

In contrast, use of X (formerly Twitter) has declined by 9 percentage points since 2020 (down from 64% to 55%).



Four young people standing and talking on pavement. London, England.
©VisitBritain/Sam Barker

Headlines: Employment

Nearly a quarter of attractions remain below pre-pandemic levels. This is most typically due to budgetary limitations, but there are a variety of reasons at play. Many sites are struggling to attract the right candidates for paid roles or volunteers, while others have restructured their operations to reduce the number of staff needed.

However, staffing levels did increase across all types of staff for all sizes of attraction in 2023.

With pressure on budgets due to wage inflation, unpaid volunteers are becoming even more essential to the running of many attraction categories. 82% of all attractions rely on their input and 2023 saw the pool of volunteers extend across all attraction categories, sizes and charging types.

Looking ahead to 2024, the expectation is for further growth across all staffing types, in particular volunteers.

Apprenticeships are also becoming increasingly popular. 16% of attractions employed apprentices in 2023. This becomes more common as the volume of admissions increases, with 36% of sites with over 100,000 visits a year employing apprentices. Based on expectations, the number of sites offering apprenticeships is set to grow by 31% over the next year.



Looking down from a balcony in a museum onto a floating dinosaur skeleton that is suspended. London, England. ©VisitBritain/The Natural History Museum/Suzanne Ostlender

Headlines: Accessibility & Sustainability

Over half (53%) of attractions invested in enhancements to their accessibility provision during 2023. The most common is in staff training, with 2 in 5 sites including this within their training schedule; just over a fifth made changes to their built environment/ amenities/services (22%) and a similar proportion improved the accessibility of their communications (19%).

Attractions are conscious of their environmental responsibilities and 61% said that they have an environmental strategy in place.

Over a quarter of attractions (27%) invested in energy saving/ carbon reduction during 2023, but this rose to 63% of large attractions (with over 200k admissions).

Financing the environmental strategy may be a challenge for some, as only 17% have ring-fenced budget to meet their environmental objectives.

Despite this, the majority of energy saving/ carbon footprint reduction measures were self-financed, even though over half of sites were aware of the government funding available to support with this.

Energy saving initiatives, such as low energy lighting and adjustable thermostats are popular amongst attractions and the majority of sites this is relevant to already have or are actively planning to install this. Installation of smart meters, to monitor energy use, is the fastest growing sustainability action, rising from 25% of sites in 2023 to 36% in 2024.



Two pheasants on the lawn in front of Blenheim Palace. Blenheim, Oxfordshire, England.
©VisitBritain/Blenheim Palace/Pete Seaward



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3. Context

2023 Context: Weather Summary

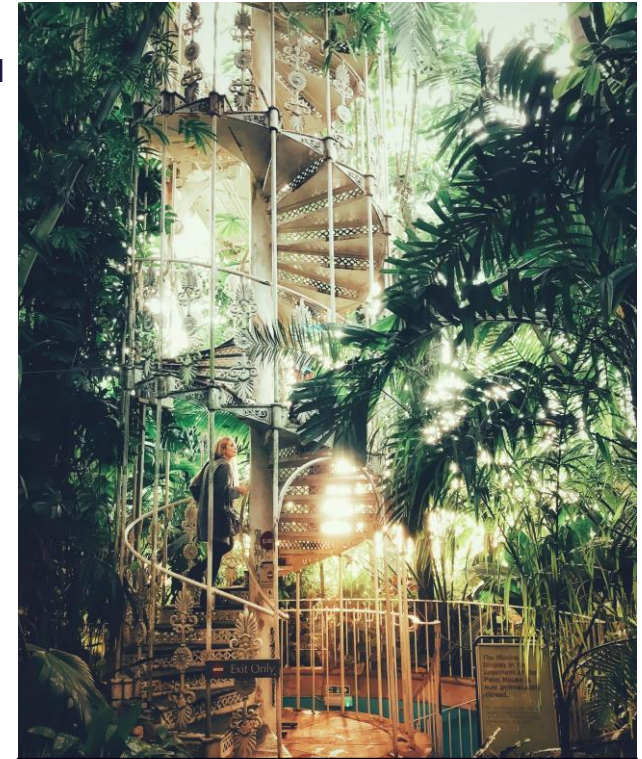
Overall 2023 was one of the five warmest years on record for the UK, and was also notably wetter than average.

The start of the year was drier, sunnier and slightly milder than usual. England had its driest February since 1993, rainfall was in short supply, particularly in areas to the south and east.

Spring 2023 brought into focus the shifting rainfall patterns around the UK, March was very wet in the south, in contrast May was drier than average in the north and west.

The Summer months were warmer and wetter than average. June was the warmest summer month – temperatures exceeded 30°C on five days, making it the hottest June on record in the UK.

Autumn 2023 was milder and wetter than average. After some warm, dry and sunny days in early September, four named storms affected the UK from late September to mid-November (Agnes, Babet, Ciarán and Debi).



Woman going up the staircase in the Palm House. London, England. ©VisitBritain/J Baxter

2023 Context: Inbound tourism

Inbound visits in 2023 remained below 2019 levels but the number of nights stayed equalled 2019 levels and there were significant improvements compared with 2022. The number of visits in 2023 was 7% down on pre-pandemic levels, but was 21% above 2022, while the volume of international visitor nights was higher than both 2019 and 2022.

According to the International Passenger Survey, the UK welcomed 38.0 million visits in total during 2023, with visit volume strengthening throughout the year except for a decline in Q4.

Visitor spend was higher in 2023 than in 2022 and 2019, but in real terms fell by 10% compared with 2019 when inflation is taken into account.

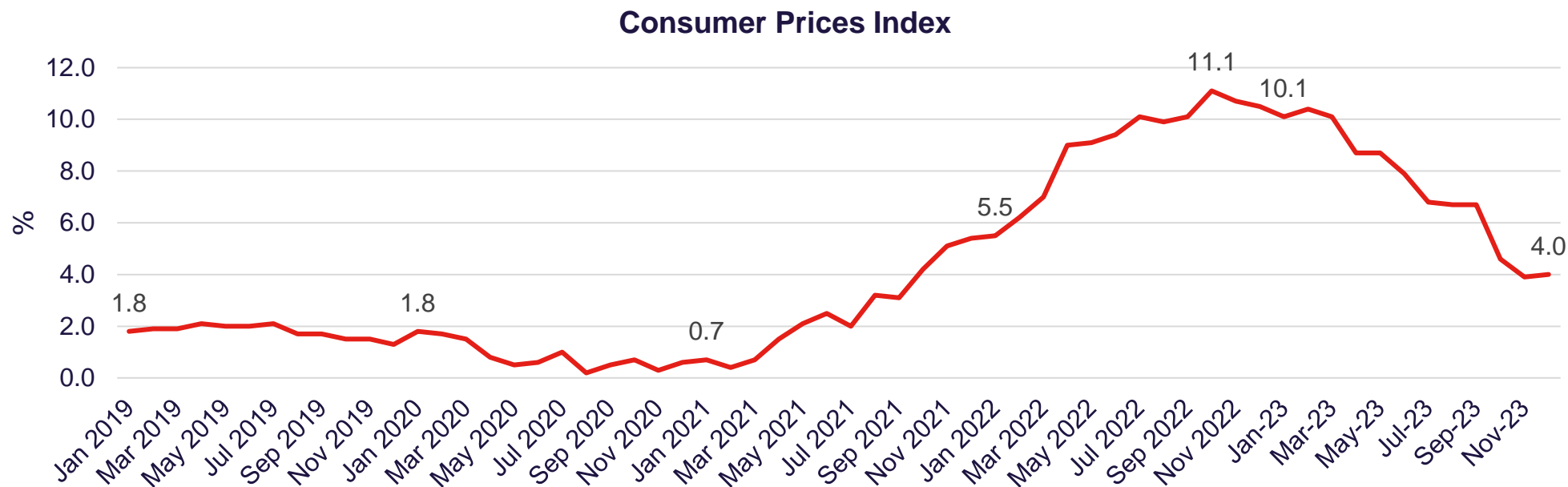
The top inbound market for visits and spend was the USA, which surpassed pre-pandemic visit levels by 14%. Other key markets were France, Germany, the Irish Republic and Spain, but these all remained below 2019 visit levels. In total, visits from Europe accounted for 65% of total inbound visits to the UK.

Total	2019	2020	2021	2022	2023	% change vs 2019	% change vs 2022
Visits (000)	40,857	11,101	6,384	31,244	37,959	-7%	21%
Spend (£m)	£28,448	£6,210	£5,646	£26,497	£31,075	9%	17%
Nights (000)	289,628	-	93,522	262,864	292,870	1%	11%

2023 Context: Cost of living

UK inflation, as measured by the Consumer Prices Index (CPI), fell throughout 2023, following its peak in Oct 2022.

This had an impact on how UK consumers felt about their own personal financial situation, measured in VisitBritain's Domestic Sentiment Tracker. This research showed improved optimism 'that the worst has passed' with regards to the cost-of-living crisis, in the first half of the year, although the majority of consumers remained cautious or continued to struggle financially throughout the year.





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4. Impact of inflation and rising costs

Impact of rising energy costs

Two thirds of attractions have been affected by rising energy costs, rising to 79% amongst charging sites, and 80% amongst sites with admissions above 100k per annum.

Sites are finding it increasingly difficult to absorb these costs, with 26% increasing costs to visitors as a result of higher energy rates in 2023, compared with 18% the year before. Charging sites are much more likely to pass costs onto visitors than free sites (with 51% vs. 16% doing so respectively). It is fairly uncommon for sites to have reduced the services they offer, with only 7% doing so.

Impact of rising energy costs, by attraction charging and attraction size

%	2023 Overall (921)	2022 Overall (973)	Free (375)	Charge (542)	20K or less (453)	20K-100K (244)	Over 100K (186)
Had to increase costs to visitors	26	18	8	40	19	34	40
Reduced income for site	44	40	39	48	43	45	48
Had to remove/ reduce certain services	7	5	9	6	5	7	11
No impact/ not relevant to site	33	36	49	21	39	27	20
% of affected sites increasing costs to visitors	39	29	16	51	31	47	50

Base: All answering impact of rising energy costs (921)

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

Impact of rising wages

58% of attractions have been affected by rising wages – a challenge that increases with attraction size (and staffing levels). This has a bigger impact on charging sites, which are less likely to benefit from free staffing through volunteers.

Impact of rising wages, by attraction charging and attraction size

%	2023 Overall (908)	2022 Overall (973)	Free (365)	Charge (539)	20K or less (441)	20K-100K (244)	Over 100K (185)
Had to increase costs to visitors	25	19	9	37	13	36	45
Reduced income for site	34	28	27	40	26	45	43
Had to remove/ reduce certain services	8	4	9	7	6	7	15
No impact/ not relevant to site	42	49	60	29	61	24	16
% of affected sites increasing costs to visitors	43	37	23	52	33	47	54

Base: All answering impact of rising costs (908)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Impact of rising supplier costs

71% of attractions were affected by rising supplier costs and these are the most likely costs to have been passed onto visitors (e.g. through increased catering prices).

This has been a particular problem for large sites, with 9 in 10 of those attracting more than 100k visits a year affected by the increase in supplier prices.

Impact of rising supplier costs, by attraction charging and attraction size

%	2023 Overall (914)	2022 Overall (956)	Free (368)	Charge (542)	20K or less (447)	20K-100K (245)	Over 100K (184)
Had to increase costs to visitors	34	28	17	46	23	43	52
Reduced income for site	40	34	35	43	37	42	47
Had to remove/ reduce certain services	10	7	10	10	8	11	11
No impact/ not relevant to site	29	31	45	18	41	19	11
% of affected sites increasing costs to visitors	48	41	31	56	39	53	58

Base: All answering impact of rising costs (914)

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



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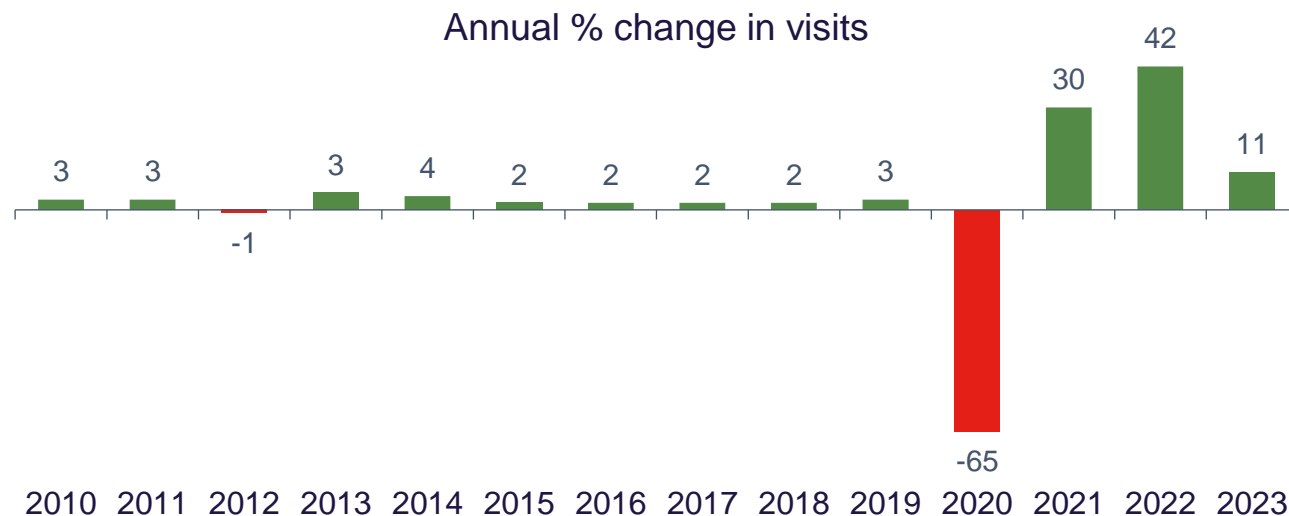
5. Visitor admission trends

Overall Visitor Admission Trends

Admissions to English attractions continued to increase in 2023, but at a slower rate than in the previous two years.

Average growth was just 11%, which means that 2023 admissions were 28% below 2019 levels.

This slowdown of recovery is associated with fewer visits by the domestic audience, which is explained on page 37 of this report.



Admissions volume for participating attractions

2023 and 2022 visitor volume was provided through the survey. * 2020 and 2019 visitor volume is an estimation based on the sector trends recorded in 2020 and 2021.

	2019	2020	2021	2022	2023
Number of visits	273.75 million*	95.81 million*	124.56 million	176.87 million	196.14 million
% difference from 2019 visit volume	/	-65%	-55%	-35%	-28%

Reasons for Declines in Admissions

Where admissions declined between 2022 and 2023 attractions provided a variety of reasons to explain this.

The key market drivers were:

- Cost of living crisis, affecting consumer day trips
- Decline in staycations
- Wet weather (affecting outdoor attractions)

Attraction specific drivers were primarily associated with:

- Planned closure (e.g. for refurbishment)
- Less successful programming in 2023/ blockbuster in 2022
- Staffing issues

“Exceptionally wet weather conditions and we’re an outdoor attraction.”

“Reduced opening hours to offset wage increases.”

“We believe the cost-of-living crisis has made consumers reconsider the priority of their spending on experiences, opting for better value (of time spent) days out. We found that there was still interest in higher priced experiences, but less volume demand of our standard offering.”

“2022 saw a surge at the beginning of our season when we were allowed to open - there were more families because they had been locked down for so long so they were looking for somewhere to visit. 2023 saw visitor numbers return to the norm.”

“Less opening hours due to difficulty finding volunteers.”

“Temporary exhibitions are running for longer due to lack of staff capacity to change as often. Exhibitions perhaps not as interesting to visitors. Older audiences still hesitant to visit due to Covid.”

Reasons for Increases in Admissions

The majority of attractions reported an increase in visitor admissions in 2023, with a return to pre-COVID opening hours and/or natural return of visitors post-COVID (individuals, schools and groups) underpinning growth across most attraction categories.

However, the highest performing attractions called out specific actions they had taken that boosted visits, which included:

- Investment in marketing – with more use of social media, and return to use of promotional leaflets
- Community outreach
- Better programming – more/ better/ more targeted events and experiences
- Extending/ enhancing facilities – play areas, tea room, exhibition spaces
- Diversification – actively seeking to attract new audiences through programming

“During the first part of 2022, we restricted visitor numbers for social distancing and were only open 5 days a week. There were no restrictions in 2023, and we opened an additional day a week during July and August.”

“Group visits started to return, albeit slowly and our core visitor demography started taking day trips again.”

“We've had an increase in school bookings from last year to see our new exhibitions. We have a session for adults with additional needs that's been running just over a year and we get at least 30 attending weekly.”

“We held an exhibition in the town centre and a stall during the Coronation celebrations. As a result, we had an increase in visits - individual and group ones; we know this because we introduced a short survey for the visitors which includes the question 'Where did you hear about us'.”

“We hosted an art show and boosted our marketing budget from 0 - £1,500, promoting visits in shoulder months and for events.”

“A change to the large events programme with updated content and more relevant focus. Introduction of skills workshops throughout the year.”

“More effective marketing due to new in-house marketing resource, as well as investment in paid social media advertising and reintroduction of a museum-focused promotional visitor leaflet that was distributed to key tourism spots around the region.”

Visitor Admission Trends 2023: By Attraction Category

The rate of change reduced across all attraction categories in 2023 compared with the last two years of rapid recovery post-pandemic, ranging from -1% to 20%.

Highest levels of growth were seen for museum/ art galleries, which suffered one of the sharpest declines in visitors as a result of COVID and has been the slowest to recover. The large national museums benefitted from the higher levels of inbound tourism in 2023, and above average levels of rainfall also benefitted this category.

Country parks, gardens and leisure/ theme park admissions remained fairly consistent with last year, with these outdoor categories adversely affected by the wetter weather in 2023.

Visitor admission trends: By Attraction Category

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Total Average	+11	+42	+30	-65
Country Parks (46) < ⁵⁰	0	- 2	+1	-7
Farms (35) < ⁵⁰	+5	+17	+58	-50
Gardens (71)	-1	+7	+40	-40
Historic Houses/Castles (313)	+13	+32	+46	-57
Other Historic Properties (129)	+9	+51	+57	-74
Leisure/Theme Parks (15) < ⁵⁰	0	+6	+47	(< ¹⁰)
Museums/Art Galleries (474)	+20	+114	+18	-76
Steam/Heritage Railways (21) < ⁵⁰	+12	+7	+118	-55
Visitor/Heritage Centre (79)	+14	+49	+46	-66
Wildlife Attractions/Zoos (63)	+6	+20	+32	-41
Workplaces (21) < ⁵⁰	+8	+55	+51	-56
Places of Worship (44) < ⁵⁰	+19	+117	+49	-73
Other (23) < ⁵⁰	0	+25	+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 (1334)
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 the subsequent slides 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.



A woman, sitting in a gallery looking at a painting. London, England. ©VisitBritain/Eric Nathan

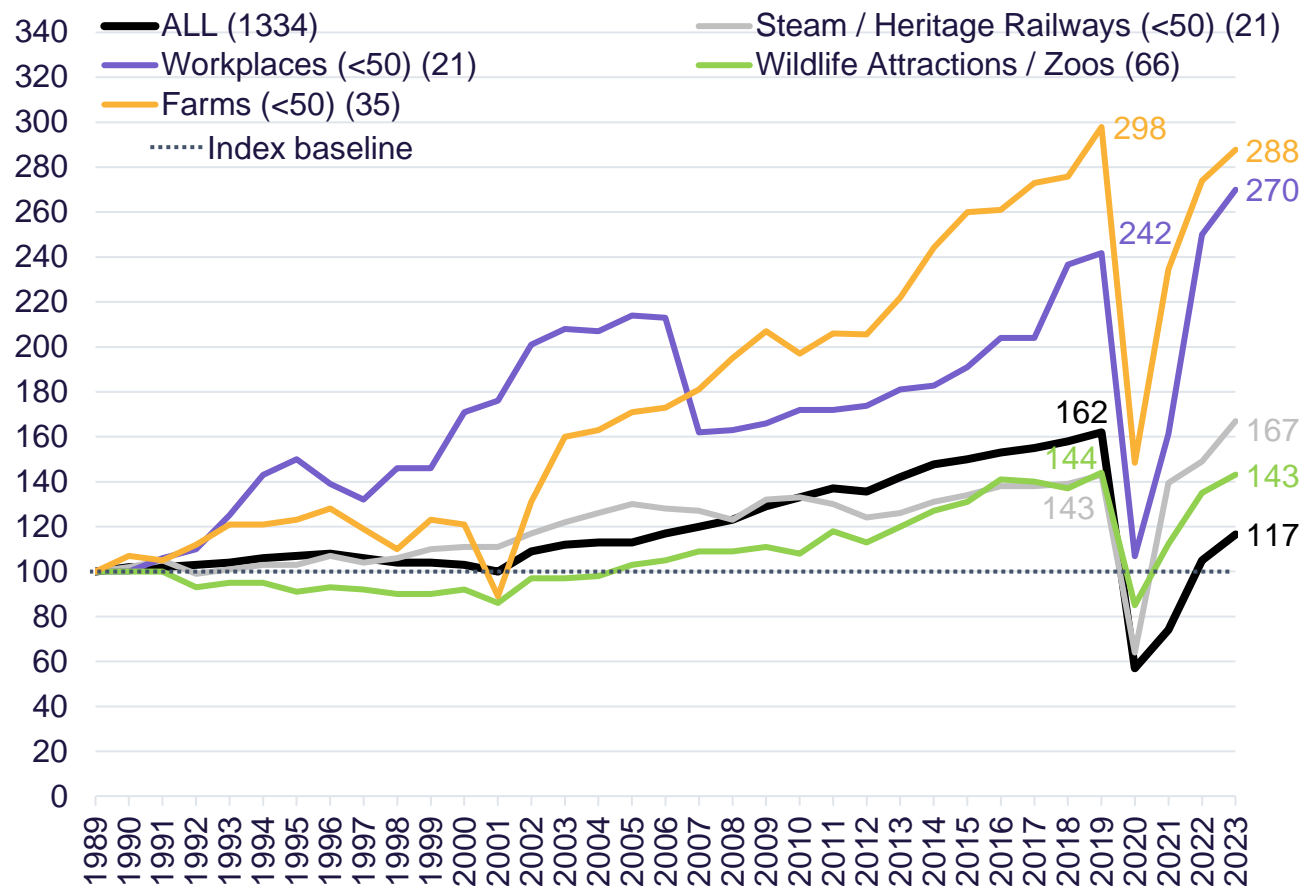
Index of Visits to Attractions: Best Performing Sectors over the long term

This chart illustrates the attraction categories that have recovered most quickly following the COVID-19 pandemic.

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. Admissions in 2023 were 17% above the 1989 baseline (index of 117), but remain significantly lower than pre-pandemic levels.

Indexes show that both Steam/ Heritage railways and Workplaces have made a full recovery post COVID, exceeding 2019 admission levels and returning to their previous growth trajectory.

Wildlife attractions/zoo and farms are also performing well and recorded higher admissions than in 2018.



Base: All attractions providing visits data for current and previous year (1334)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

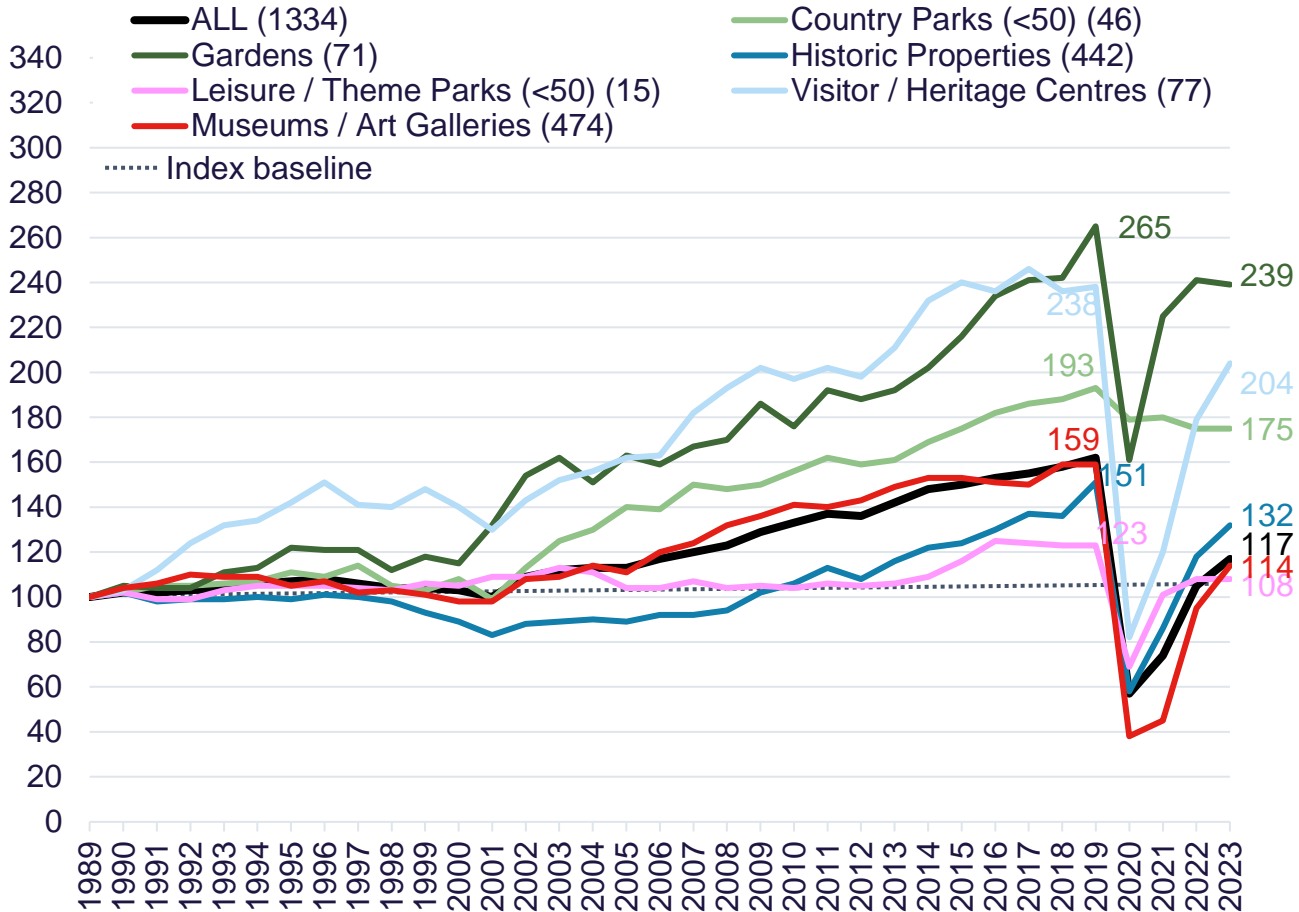
Index of Visits to Attractions: Other Sectors performance over the long term

This chart illustrates the attraction categories that have not yet recovered to pre-pandemic admission levels.

Positively, all categories are now operating above the 1989 benchmark levels in terms of visitor volume, but there are still some substantial shortfalls in comparison with 2019.

Country Parks were the least affected by the pandemic, but visits have been in decline over the last couple of years, while gardens were quick to recover but have seen limited growth since 2021.

Other attraction categories remain substantially below 2019 levels – in particular museums & galleries.



Base: All attractions providing visits data for current and previous year (1334)
 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 2023: By Region

Most regions saw admissions growth of between 4-8%.

The exception was London, which saw admissions grow by 26%. With greater reliance on international tourism than other areas, London was hit hardest by the COVID-19 pandemic and saw limited recovery in 2021. The return of overseas visitors during 2022 and 2023 bolstered visit volume, leading to year growth levels that far exceeded other regions. Nevertheless, despite the high percentage increase, the volume of attraction visits in London remains substantially below 2019 levels.

Visitor Admission Trends: By Region

	2022/2023 change [%]	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
Total Average	+11	+42	+30	-65
North West (144)	+6	+42	+57	-62
North East (89)	+7	+29	+45	-68
Yorks /Humber (122)	+5	+36	+45	-54
East Midlands (129)	+8	+16	+22	-50
West Midlands (132)	+6	+19	+30	-53
East (163)	+4	+19	+29	-40
London (85)	+26	+141	+12	-77
South East (241)	+6	+20	+17	-58
South West (229)	+6	+20	+52	-60

Visitor Admission Recovery vs. 2019: By Region

This chart looks at the regional recovery compared with 2019 visit volume.

London was the worst hit region and recovery in 2021 was limited, but it has now gained ground and is outperforming the average in terms of recovery vs. 2019.

The East of England was least affected by the pandemic, and has been the quickest to recover, now only 4% behind 2019 levels, as is Yorkshire & The Humber.

The South East and North East are displaying the slowest recovery, at 37% down and 36% down respectively, compared with 2019.

Change in visit volume vs. 2019: By region

2023 and 2022 visitor volume was provided through the survey. This was calculated for participating sites for 2021 and 2020 based on regional averages, and then converted into the percentage change.

	2019/ 2023 change [%]	2019/ 2022 change [%]	2019/ 2021 change [%]	2019/ 2020 change [%]
Total average	-28	-35	-55	-65
North West (144)	-10	-15	-40	-62
North East (89)	-36	-40	-54	-68
Yorks/Humber (122)	-4	-9	-33	-54
East Midlands (129)	-24	-29	-39	-50
West Midlands (132)	-23	-27	-39	-53
East (163)	-4	-8	-23	-40
London (85)	-22	-38	-74	-77
South East (241)	-37	-41	-51	-58
South West (229)	-23	-27	-39	-60

Visitor Admission Trends 2023: 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 also reported the slowest recovery in 2021. However, they turned a corner in 2022 with large percentage increases in admissions and continued to exhibit the fastest growth levels in 2023 (with increases of 14% for free sites and 17% for urban sites in 2023).

Free sites benefited from consumers' financial caution associated with high inflation/ cost of living in 2023*, while attractions in urban centres are more likely to have profited from the increase in inbound tourism.

Visitor Admission Trends 2022: By Admission Charge, Area Type & Size

	2022/2023 change [%]	2021/2022 change [%]	2020/2021 change [%]	2019/2020 change [%]
Total Average	+11	+42	+30	-65
Free (438)	+14	+79	+19	-71
Paid (896)	+8	+24	+37	-60
Coastal (162)	+7	+16	+47	-59
Rural (709)	+6	+12	+30	-47
Urban (463)	+17	+94	+23	-74
20,000 visits or less (588)	+8	+48	+36	-68
20,001 – 50,000 visits (232)	+11	+40	+56	-66
50,001 – 200,000 visits (294)	+9	+28	+39	-58
Over 200,000 visits (220)	+11	+46	+26	-66

Visitor Admission Trends 2023: Among Free Attractions and Among Paid Attractions

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

Visitor Admission Trends: Free Attractions

Free Attractions	2022/2023 change [%]	2021/2022 change [%]
ALL FREE (438)	+14	+79
Country Parks (17) < ⁵⁰	+3	+4
Farms (13) < ¹⁰	+6	(< ¹⁰)
Gardens < ¹⁰	(< ¹⁰)	(< ¹⁰)
Historic Houses/Castles (21) < ⁵⁰	+17	+135
Other Historic Properties (27) < ⁵⁰	*	+14
Leisure/Theme Parks < ¹⁰	(< ¹⁰)	(< ¹⁰)
Museum/Art Galleries (253)	+22	+134
Steam/Heritage Railways < ¹⁰	(< ¹⁰)	(< ¹⁰)
Visitor/Heritage Centres (51) < ⁵⁰	+4	+32
Wildlife Attractions/Zoos < ¹⁰	(< ¹⁰)	(< ¹⁰)
Workplaces < ¹⁰	(< ¹⁰)	(< ¹⁰)
Places of Worship (35) < ⁵⁰	+15	+51
Other (< ¹⁰)	(< ¹⁰)	(< ¹⁰)

Visitor Admission Trends: Paid Attractions

Paid Attractions	2022/2023 change [%]	2021/2022 change [%]
ALL PAID (896)	+8	+24
Country Parks (29) < ⁵⁰	-2	-5
Farms (22) < ⁵⁰	+4	+19
Gardens (70)	-1	+7
Historic Houses/Castles (292)	+13	+27
Other Historic Properties (102)	+12	+64
Leisure/Theme Parks (13) < ⁵⁰	*	+6
Museum/Art Galleries (221)	+12	+47
Steam/Heritage Railways (20) < ⁵⁰	+12	+7
Visitor/Heritage Centres (28) < ⁵⁰	+26	+68
Wildlife Attractions/Zoos (59)	+6	+21
Workplaces (15) < ⁵⁰	-6	+30
Places of Worship < ¹⁰	(< ¹⁰)	(< ¹⁰)
Other (16) < ⁵⁰	+4	+55

Base: All attractions providing visits data for current and previous year Paid (896) Free (438)
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)

<¹⁰ Base size less than 10 (figure therefore omitted)

Visitor Admission Trends 2023: Region by Admission Charge & Area Type

Urban attractions in London and the South East reported the highest levels of growth, followed by urban areas in the North West. However, findings should be treated with caution due to low base sizes.

Visitor Admission Trends 2023: Regional breakdown by admission charge & area type

2022/23 change %	Free	Paid	Coastal	Rural	Urban
Total Average	+14	+8	+7	+6	+17
North West (144)	+8	+5	+2 <50	+4	+15
North East (89)	+10 <50	+5	-2 <50	+5 <50	+11 <50
Yorks/Humber (122)	+9 <50	+3	+13 <50	+3	+7
East Midlands (129)	+7 <50	+8	(<10)	+8	+10 <50
West Midlands (132)	+1 <50	+9	(<10)	+3	+8
East (163)	+3	+5	+2 <50	+6	+2 <50
London (85)	+26 <50	+26 <50	(<10)	(<10)	+25
South East (241)	+7	+5	-2 <50	+7	+21
South West (229)	+3	+6	+3 <50	+6	+8 <50

Base: All attractions providing visits data for current and previous year (1334)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)
 <10 Base size less than 10 (figure therefore omitted)

Visitor Admission Trends 2023: Child Visits Summary

The volume of children visiting attractions increased by 16% from 2022 to 2023, slightly exceeding the total sector growth of 11%.

School trips continued to increase (by 25% compared with 2022) and accounted for 6% of admissions in 2023, equalling their proportion share of visits in 2019.

However, the volume of school visits remained substantially behind 2019 levels.

Change in all admissions by category

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Total Average	+11	+42	+30	-65
30% or less children (523)	+13	+45	+36	-67
Over 30% children (166)	+6	+44	+29	-58

Change in volume of child admissions

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Child admissions (443)	+16	+25	+41	-61
Schoolchildren admissions (605)	+25	+204	+6	-84

Visitor origin profile: 2023

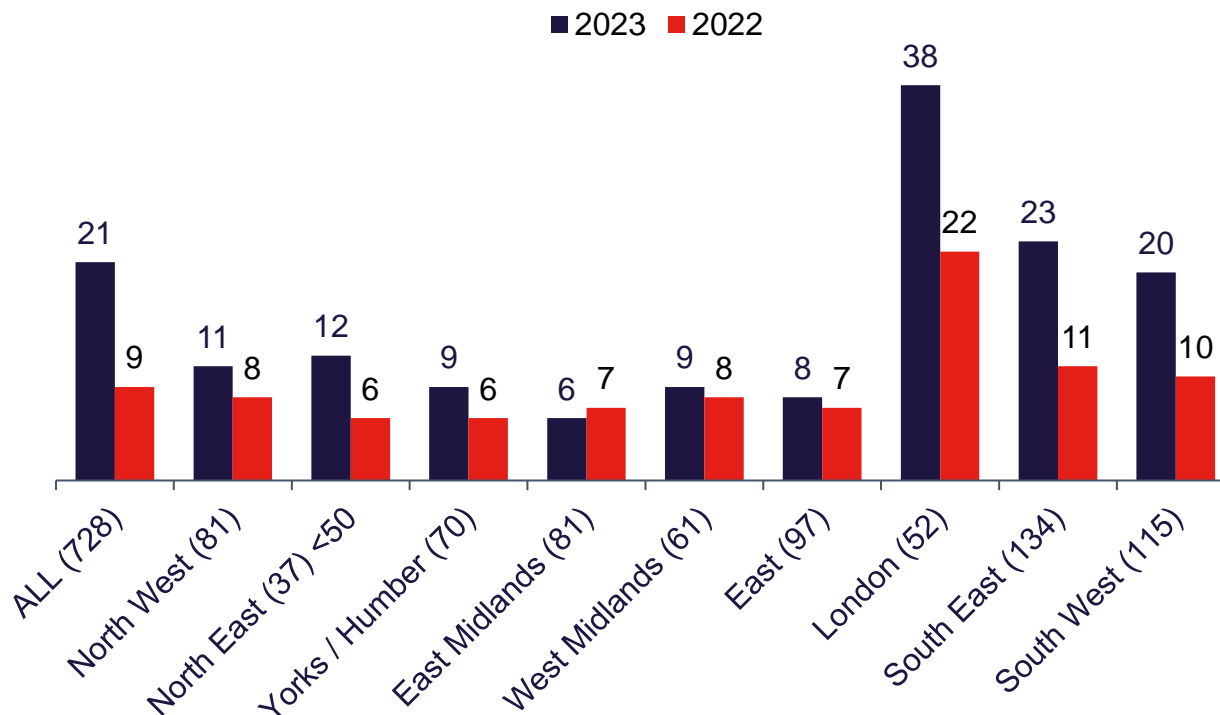
The average share of visitors who come from overseas quoted by attractions is 21%.

Most regions reported an increase compared with 2022 (East Midlands being the exception, with a slight decline from 7% to 6%).

Southern England reported the highest levels of overseas visitors (up to 38% in London, 23% in the rest of the South East, and 20% in the South West) and large increases versus 2022.

The South East, South West and North East all notably reported a doubling in the proportion of their visitors coming from overseas.

Average % of visitors coming from overseas*



* This chart shows the average of % visiting from overseas quoted by attractions. This doesn't represent visit volume as it doesn't take into account differences in attraction size.

Visitor Admission Trends 2023: By Visitor Origin

According to the International Passenger Survey, inbound tourism increased to nearly 38 million visitors in 2023 – a 21% increase on 2022. This had a direct impact on the average volume of overseas visitors to English attractions, with 43% of sites reporting an increase.

A little under half of these sites also provided the % of visitors from overseas, along with total admissions for 2022 and 2023. This allowed us to calculate the volume of overseas visits in both years along with the % change – an increase of 80%.

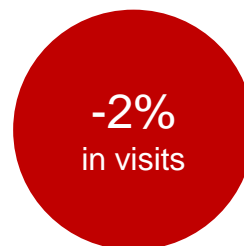
While domestic visits also increased or stayed the same at most sites, 15% of attractions reported a decrease, and there was a drop in overall domestic visit volume (of 2%), driven by a decline at large sites (with annual admissions exceeding 200k).

VisitBritain's Domestic Sentiment Tracker found that the rising cost of living meant that the majority of consumers were financially squeezed or felt they had to be cautious with their money during 2023, which may have led to a prioritisation of day trips that affected some attractions more than others.

Change in volume of visits from 2022 to 2023 [%]

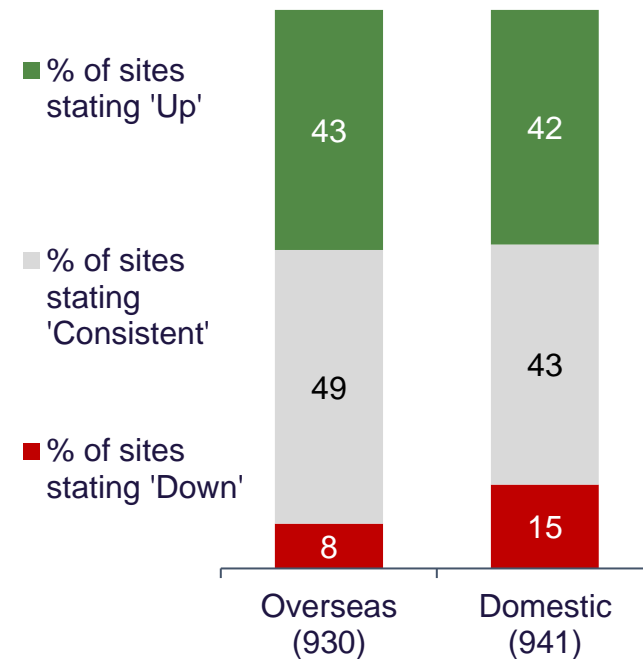


Overseas (441)



Domestic (458)

Stated change in volume of visits from 2022 to 2023 [%]



Base: All providing % of overseas/ domestic 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; VisitBritain Domestic sentiment tracker.

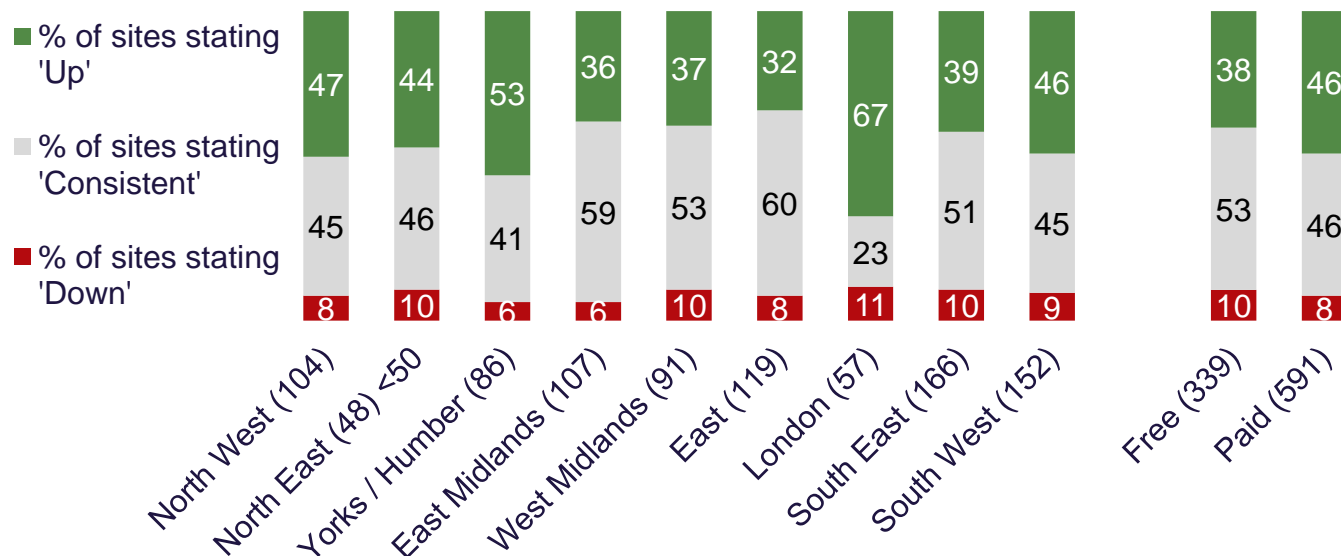
Visitor Admission Trends 2023: Overseas Visitors by Region

There was growth in overseas visits across all regions.

This was most notable in London, where 67% of attractions reported an increase in international tourists (compared with just 11% seeing a decline).

Sites charging an entrance fee were more likely to have grown their overseas visits.

2022/23 Stated change in volume of overseas visitors [%]



Base: All answering overseas visitor question (930)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

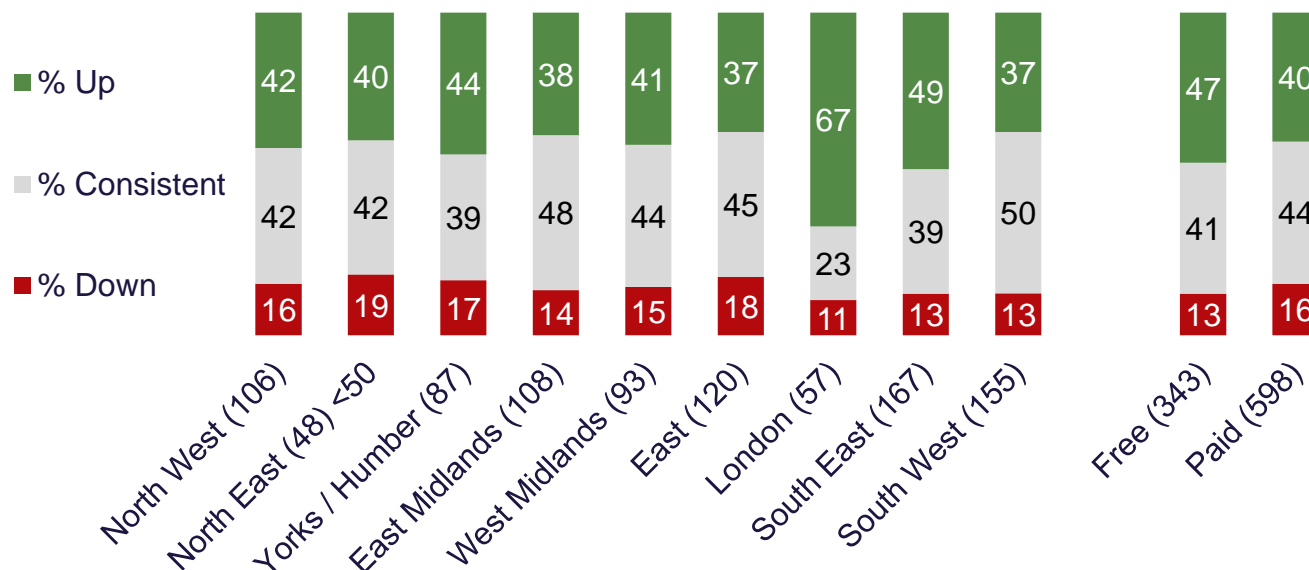
<50 Base size below 50 (please treat with caution)

Visitor Admission Trends 2023: Domestic Trip Visitors by Region

Around 2 in 5 attractions reported an increase in domestic visitors across most regions. London and the South East were the exception, where two thirds and half of attractions respectively benefitted from higher levels of domestic visits.

We know from the Domestic Sentiment Tracker* that domestic consumers have tightened their belts, as a result of the increase in cost of living. Free attractions have benefited from this, with 47% reporting an increase in domestic visits as opposed to 40% of charging sites.

2022/23 Stated change in volume of local / day trip visitors [%]



Base: All answering domestic visitor question (941)

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

* Source: VisitBritain Domestic sentiment tracker.

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

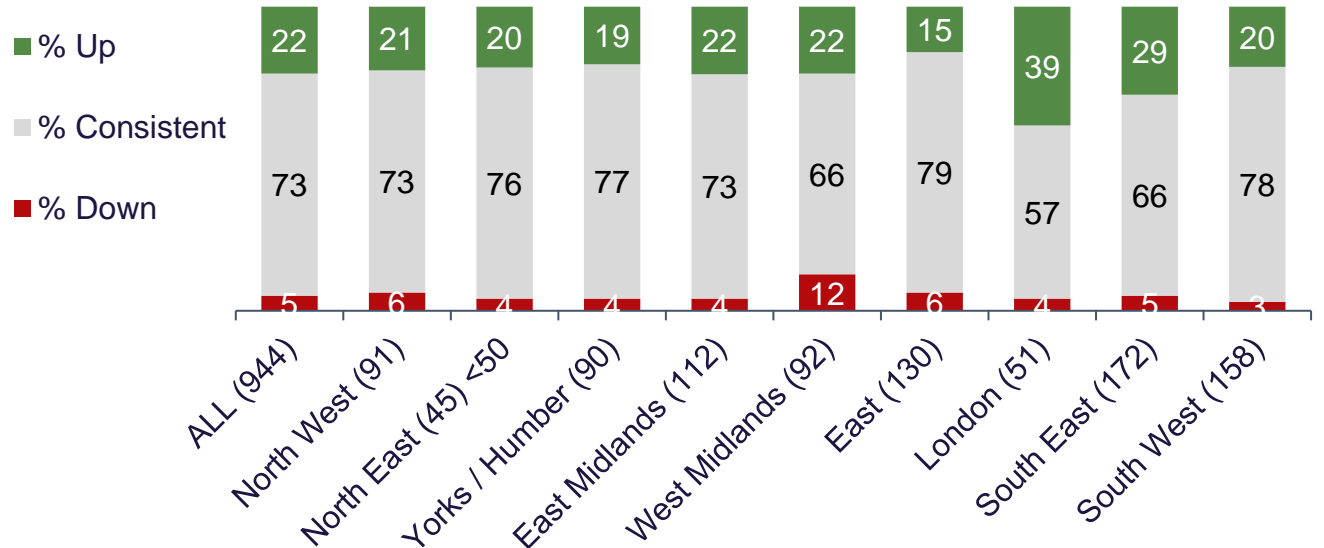
Visitor Admission Trends 2023: Family Group Visitors by Region

The share of family visits remained between 30-40% for most regions, with this only being exceeded by Yorkshire & The Humber, where 40% of visits were made by family groups.

This share of visits is similar to 2022, although the volume of family admissions increased in 2023 – particularly in London, where 39% of attractions reported higher levels of family visits.

2023, % visiting in a family group (mean share)	36	34	36	44	36	30	37	31	36	34
2022, % visiting in a family group (mean share)	36	41	34	37	35	37	36	27	36	35

2022/23 stated change in the volume of family visitors [%]



Base: All answering family group question (944)

Base: All stating the proportion of visits by families (906)

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 2023: Family Group Visitors by Attraction Category

Attractions naturally fall into three tiers of family engagement:

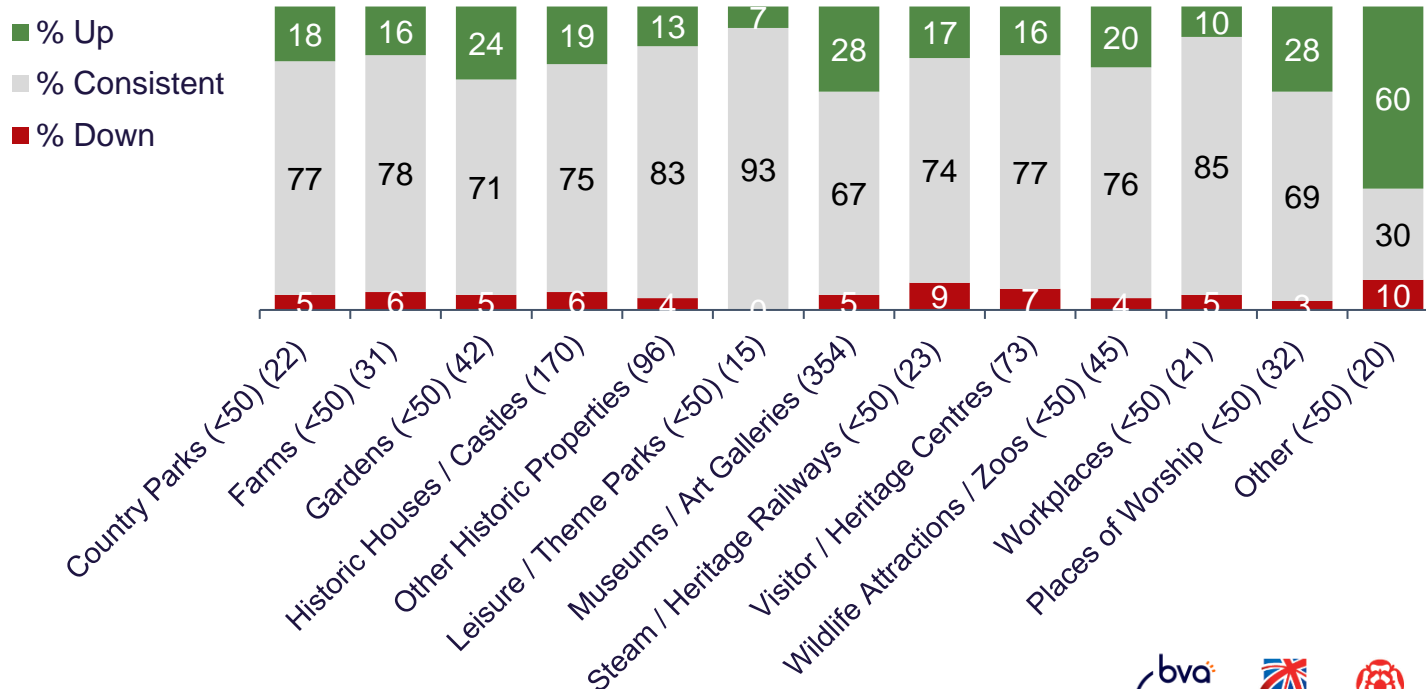
- **High:** Farms (80%) and Leisure/ theme parks (80%)
- **Moderate:** Country Parks (52%), Steam/ Heritage railways (54%) and Wildlife attractions (51%)
- **Low:** All other types, with penetration of family groups falling below 40%

Reliance of farms and leisure/ theme parks on families extended further, but these categories were less likely than average to have grown their family audience in 2023.

Museums & Galleries and Places of Worship were most likely to report a growth in family visits.

2023, % visiting in a family group (mean share)	52	80	23	31	37	80	33	54	31	51	11	21	38
	(<50)	(<50)	(<50)			(<50)		(<50)		(<50)	(<50)	(<50)	(<50)
2022, % visiting in a family group (mean share)	56	76	29	32	36	75	31	54	38	49	20	18	32
	(<50)	(<50)	(<50)			(<50)		(<50)		(<50)	(<50)	(<50)	(<50)

2022/23 stated change in the volume of family visitors [%]



Base: All answering family group question (944)

Base: All stating the proportion of visits by families (906)

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

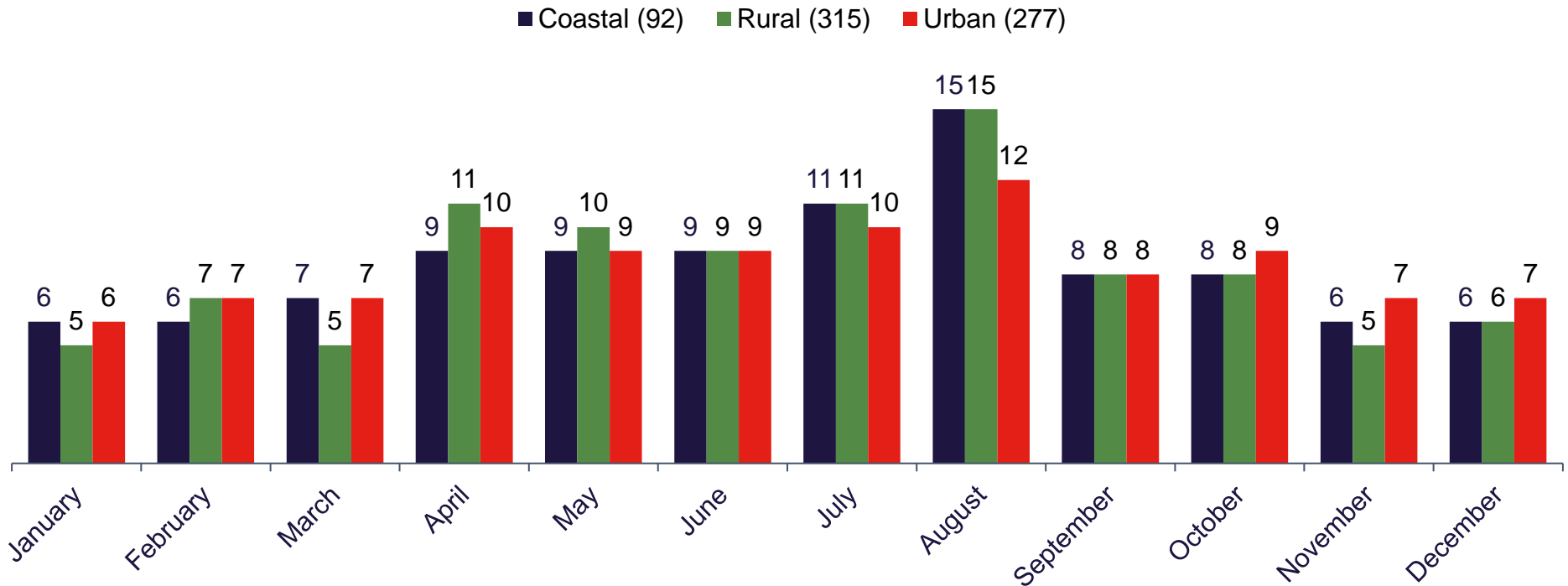
(<50) Base size below 50 (please treat with caution)

Visitor Admission by Month

As we would expect, admissions are higher over the summer months, peaking in August.

Visits to urban attractions are more evenly spaced across the year, whereas the performance of attractions based in coastal and rural areas are more reliant on the summer months.

Proportional admissions across the year, by area type (%)



Base: All answering visitor volume by month question (684)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.



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6. Admission charge & revenue trends

Adult Admission Charges 2023

The average adult (high season) admission price increased to £11 in 2023.

The proportion of charging attractions with an entry fee of less than £3 remained consistent at 7%, but above this there was an upwards shift. The proportion charging £12 or more increased from 25% to 31%.



66%

of English attractions charged for entry in 2023.

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



Adult Admission Charge Trends 2023: By Attraction Category

Adult peak season entrance prices rose by an average of 8% in 2023 – slightly below the rate of inflation at the start of the year (10% based on the Consumer Price Index) when most prices would have been set.

Adult entrance increased across all attraction types, typically between 5-9%.

82% of charging attractions, charged for child entry.

In 2023 the average child entry price was £7.17. While still increasing, the inflation for child admission charges was lower – 5% on average.

Change in adult admission charge: by attraction category

	Average 2023 charge	2022/23 change [%]	2021/22 change [%]
ALL PAID ATTRACTIONS (650)	£11	+8	+6
Country Parks < ¹⁰	(<10)	(<10)	+2
Farms (21) < ⁵⁰	£12.03	+5	+5
Gardens (48) <⁵⁰	£10.41	+6	+6
Historic Houses/Castles (169)	£11.91	+9	+4
Other Historic Properties (76)	£10.66	+9	+6
Leisure/Theme Parks (12) < ⁵⁰	£17.9	+7	+5
Museum/Art Galleries (200)	£7.72	+8	+5
Steam/Heritage Railways (19) < ⁵⁰	£12.22	+10	+4
Visitor/Heritage Centres (24) < ⁵⁰	£8.49	+5	+8
Wildlife Attractions/Zoos (50)	£16.4	+3	+6
Workplaces (10) < ⁵⁰	£13.8	+7	+14
Places of Worship < ¹⁰	(<10)	(<10)	(<10)
Other (13) < ⁵⁰	£26.72	+8	+5

Base: All answering admission charge question in 2023 (650)

Base: All answering admission charge question in 2022 and 2023 (617)

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

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

<¹⁰ Base size less than 10 (figure therefore omitted)

Adult Admission Charge Trends 2023: By Region

The increase in entrance prices was fairly consistent across regions, with most increasing prices by 7-8%.

Average entrance fees in 2023 were lowest in the North East (£9.15), and highest in London, where the average increased to £15.44.

Change in adult admission charge: by region

	Average 2023 charge	2022/23 change [%]	2021/22 change [%]
North West (59)	£9.97	+7	+5
North East (36) ^{<50}	£9.15	+6	+5
Yorks / Humber (68)	£11.32	+7	+4
East Midlands (75)	£10.32	+7	+6
West Midlands (59)	£12.59	+9	+4
East (79)	£10.34	+8	+6
London (30) ^{<50}	£15.44	+8	+3 (<50)
South East (116)	£10.61	+8	+7
South West (128)	£11.21	+8	+6

Base: All answering admission charge question in 2023 (650)

Base: All answering admission charge question in 2022 and 2023 (617)

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 2023: 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.

The average entrance fee for small attractions, with 20,000 visits or less is £8.85 and this rises to £16.28 amongst attractions with over 100,000 visitors a year.

Price inflation was slightly higher in urban areas in 2023.

Change in adult admission charge: by attraction size

	Average 2023 charge	2022/23 change [%]	2021/22 change [%]
20,000 or less p.a. (294)	£8.85	+9	+6
20,001 – 50,000 p.a. (136)	£9.78	+5	+5
50,001 – 100,000 p.a. (68)	£11.82	+8	+5
Over 100,000 p.a. (144)	£16.28	+8	+5

Change in adult admission charge: by area type

	Average 2023 charge	2022/23 change [%]	2021/22 change [%]
Coastal (94)	£9.92	+7	+4
Rural (366)	£11.57	+7	+7
Urban (190)	£10.44	+9	+4

Base: All answering admission charge question in 2023 (650)

Base: All answering admission charge question in 2022 and 2023 (617)

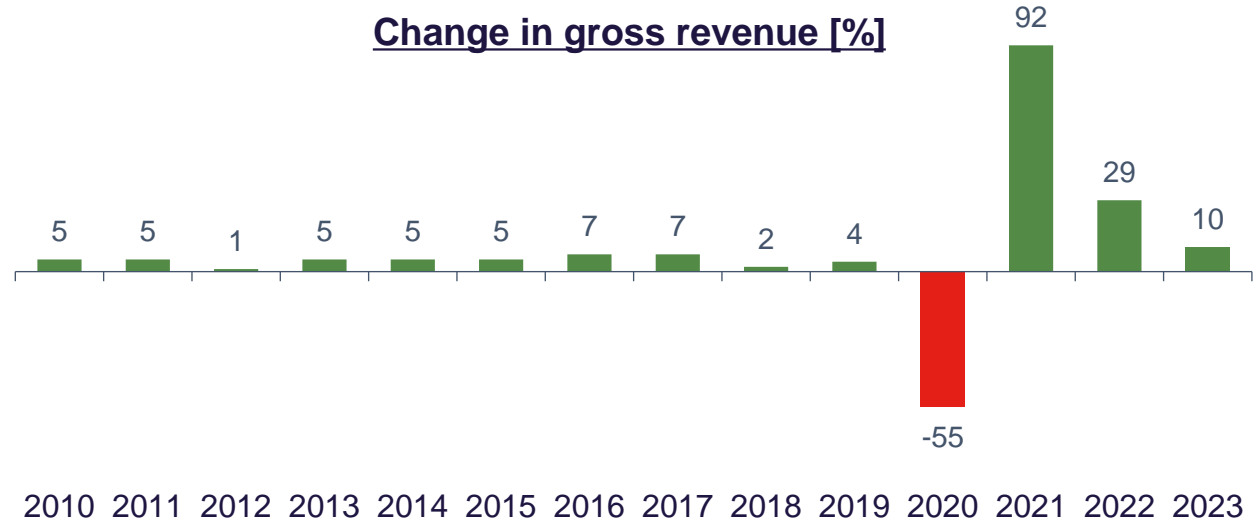
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions increased by 10% in 2023.

This remains above the rate of inflation, which ranged from 10% (Jan 2023) to 4% (Dec 2023) for the Consumer Price Index.

Growth in revenue was fuelled by higher footfall and higher entrance prices (at charging attractions).



Gross Revenue Index Trend

In the same way that the volume of visits to attractions is indexed on pages 28-29, we have used an index to show the gross revenue trend.

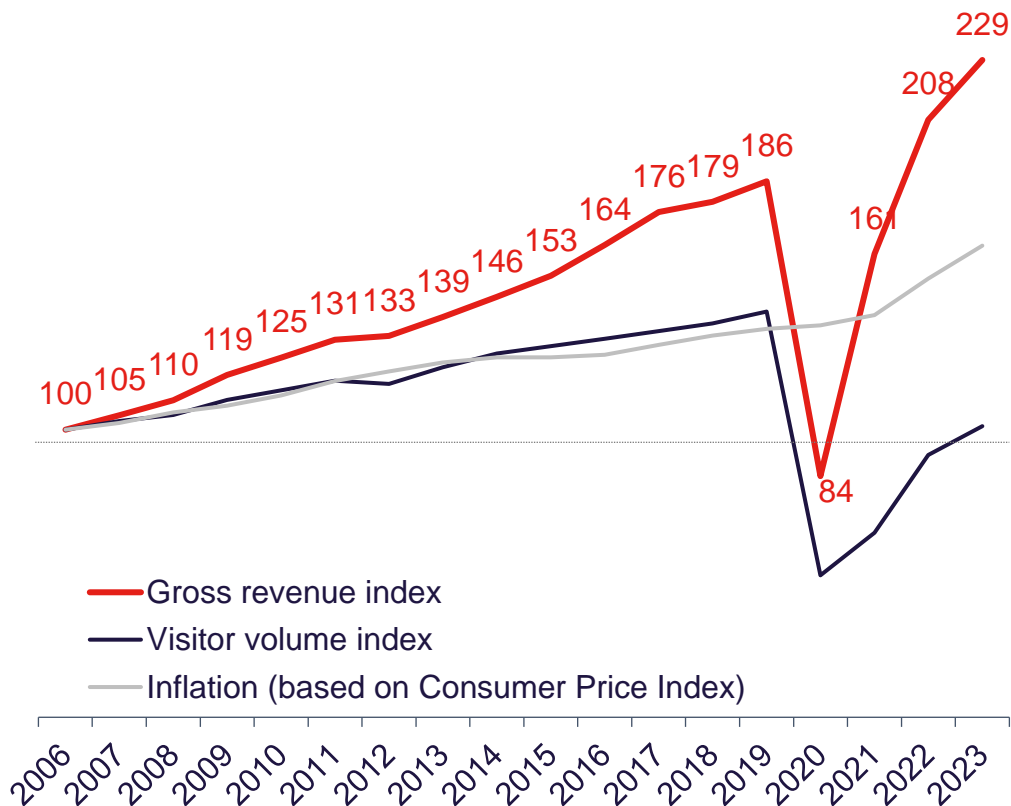
In this chart the **base year for both indexes is 2006, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. gross revenue increased by 5% between 2006 and 2007, increasing the index for 2007 to 105.

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, gross revenue has recovered more quickly than visitor admissions, and has returned to the growth trajectory seen before the pandemic. This is because of above inflationary increases in admission fees, grants and other revenue generating business.

The increase in staff wages, energy bills, supplier costs etc. during 2022-23 means that, despite the increase in revenue, the increase in profit margins is likely to be more modest.

Gross revenue index trend, compared to visitor volume index trend



Gross Revenue Trend 2023: By Attraction Category

The gross revenue trend has fluctuated significantly between attraction types over the last few years, at this continued into 2023.

At the lower end is Country Parks, Leisure/ Theme Parks, and Workplaces, which all reported a small decrease in gross revenue - of 2%, 2% and 1% respectively. Admissions volume and average entrance prices (where applicable) had either remained the same or grown at these attractions, so the decrease is likely to have been driven by discounting or lower secondary spend.

At the upper end we saw gross revenue increases of 17% for 'other historic properties'.

Please note small base sizes for many categories.

Average % change in gross revenue

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Country Parks (22) ^{<50}	-2	+2	+14	-26
Farms (32) ^{<50}	+16	+20	+52	-38
Gardens (42) ^{<50}	+6	+8	+167	-44
Historic Houses / Castles (169)	+10	+21	+123	-58
Other Historic Properties (96)	+17	+46	+114	-63
Leisure / Theme Parks (11) ^{<50}	-2	+2	+90	(<10)
Museums / Art Galleries (361)	+13	+39	+67	-55
Steam/Railways (22) ^{<50}	+10	+21	+103	-63
Visitor / Heritage Centres (74)	+5	+34	+156	-65
Wildlife Attractions / Zoos (44) ^{<50}	+5	+15	+45	-36
Workplaces (21) ^{<50}	-1	+60	+45	-60
Places of Worship (34) ^{<50}	+11	+36	+84	-60
Other (19) ^{<50}	+4	+59	+50	-69

Base: All attractions open during 2022 and 2023 and answering revenue question (947)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

^{<50} Base size below 50 (please treat with caution)
^{<10} Base size less than 10 (figure therefore omitted)

Gross Revenue Trend 2023: By Region

Gross revenue increased across the country.

London recorded the highest level of growth (+24%), for the second year running, driven by the high growth in visitor admissions in this region (+26%).

All other regions saw an average revenue growth of between 5% and 13%.

Average % change in gross revenue

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
North West (89)	+12	+22	+135	-60
North East (56)	+6	+27	+65	-56
Yorks / Humber (88)	+5	+23	+76	-35
East Midlands (110)	+7	+25	+74	-59
West Midlands (90)	+13	+26	+77	-58
East (131)	+10	+25	+72	-51
London (46) ^{<50}	+24	+72	+97	-67
South East (177)	+12	+33	+61	-59
South West (160)	+10	+29	+148	-53

Gross Revenue Trend 2023: By Admission Charge & Attraction Size

Charging attractions benefitted from the entrance price increases and so reported better gross revenue statistics than free sites (an increase of 12% from 2022 to 2023, compared with 7% at free sites).

While large attractions with over 100,000 visitors a year reported the highest increase in gross revenue in 2023, it is actually attractions with 20,000-50,000 visits a year that are most likely to have extended their gross profit since the pandemic, following a strong recovery in 2021 and 2022.

Average % change in gross revenue: by admission charge

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Free (363)	+7	+24	+68	-54
Paid (584)	+12	+32	+105	-55

Average % change in gross revenue: by attractions size

	2022/23 change [%]	2021/22 change [%]	2020/21 change [%]	2019/20 change [%]
Up to 20k p.a. (451)	+11	+35	+100	-60
20k – 50k p.a. (186)	+9	+29	+118	-56
50k – 100k p.a. (86)	+9	+22	+93	-54
Over 100k p.a. (193)	+13	+22	+56	-45



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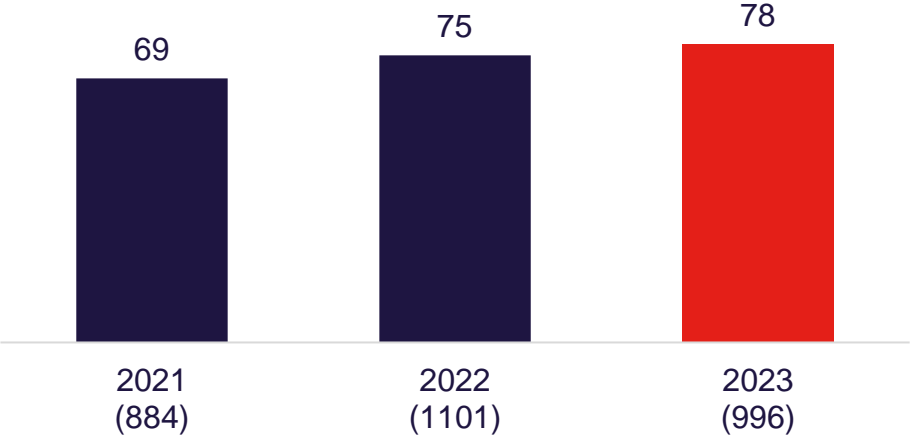
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7. Employment trends

Return to Pre-Pandemic Staffing Levels

Limited progress on staffing levels compared with last year, with nearly a quarter of attractions still below pre-pandemic levels. This is most typically due to budgetary limitations, but there are a variety of reasons at play. Many sites are struggling to attract the right candidates for paid roles or volunteers, while others have restructured their operations to reduce the number of staff needed.

% of attractions that are back to pre-pandemic levels



Reasons not yet back to pre-pandemic staffing	2023
Budgetary limitations	48%
Difficulty in attracting the right candidates	26%
Other	35%

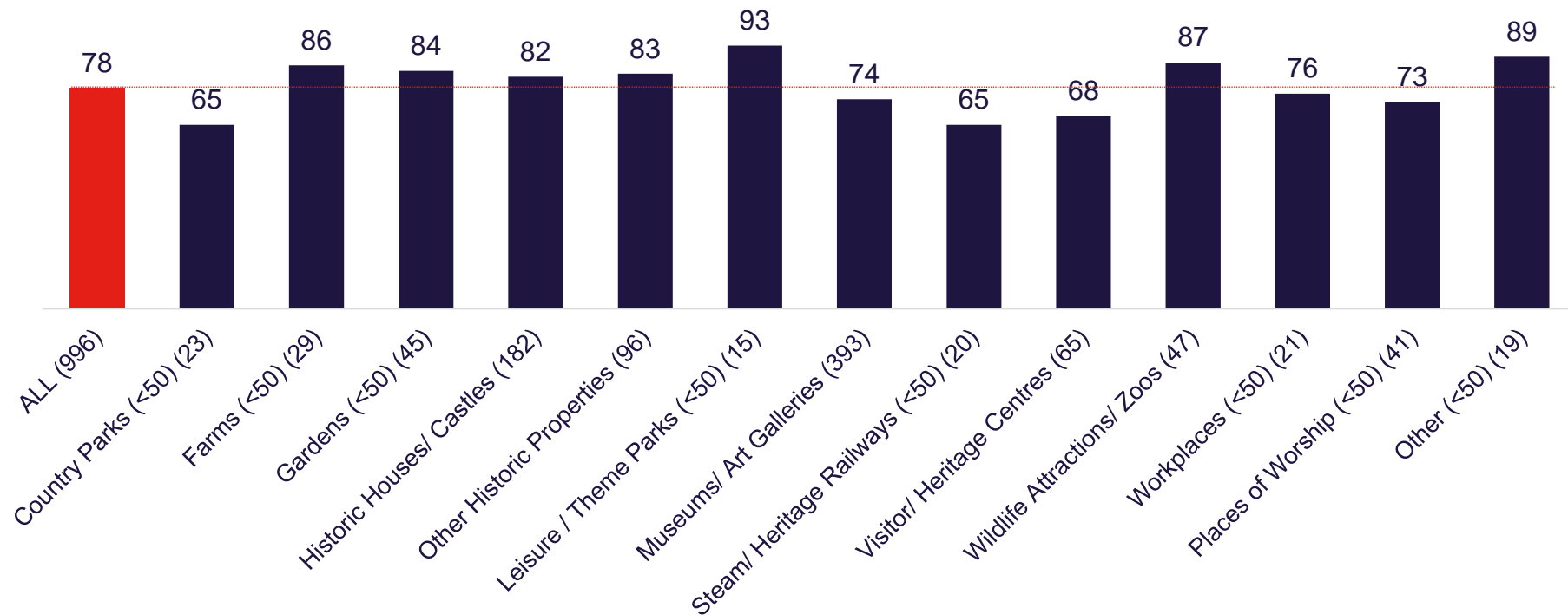
- Common other reasons:**
- Volunteers not returning
 - Restructuring/ more efficient working practices
 - Insufficient visitor numbers to warrant recruitment

Base: All answering back to pre-pandemic staffing levels, excluding 'don't know'. Base sizes shown in brackets under each data point.
 Base: Sites answering, who were not back to pre-pandemic levels in 2023 (186)

Return to Pre-pandemic Staffing Levels: By Attraction Category

Around 75-85% of attractions are back to pre-pandemic staffing levels for most attraction categories. Where there are variations from this, base sizes are relatively low and so the data should be treated with caution.

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



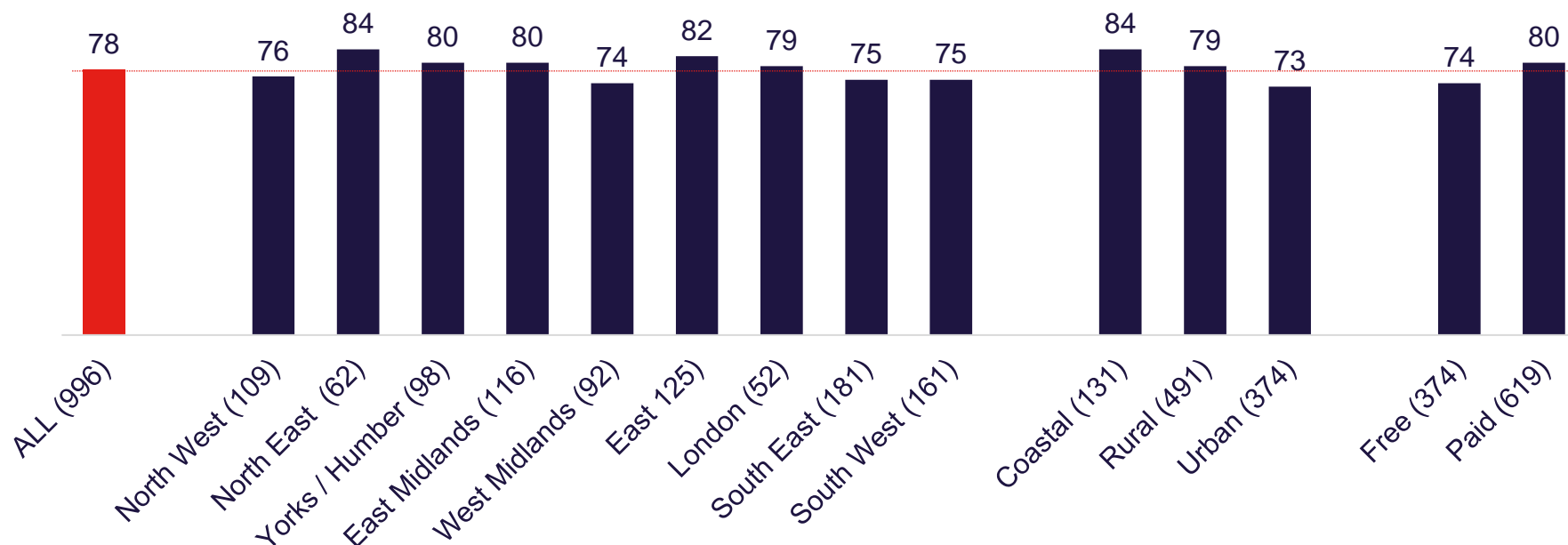
Base: All answering back to pre-pandemic staffing levels, excluding 'don't know'. (996)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

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

Urban attractions are less likely to have returned to pre-pandemic staffing levels than sites based in rural or coastal areas and free sites are also more likely to be operating with fewer staff members.

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

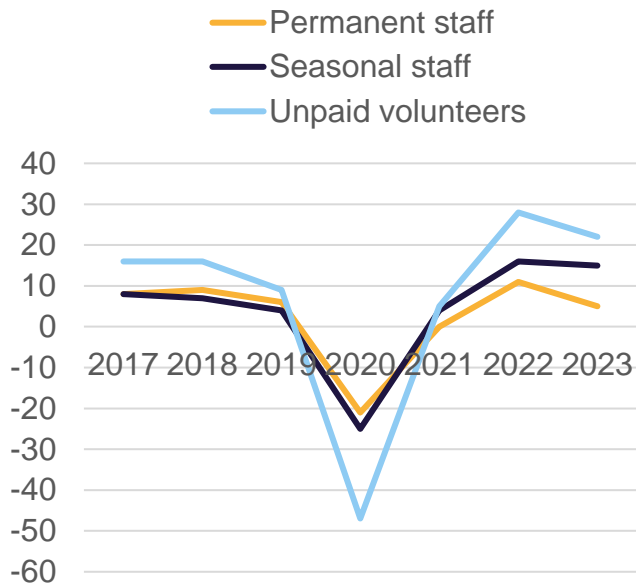


Base: All answering back to pre-pandemic staffing levels, excluding 'don't know'. (996)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Overall Employment Trends

There was a net (% increase minus % decrease) increase in all types of staff, in particular in unpaid volunteers. Looking ahead to 2024, the expectation is for further growth, with significant demand for more volunteers.

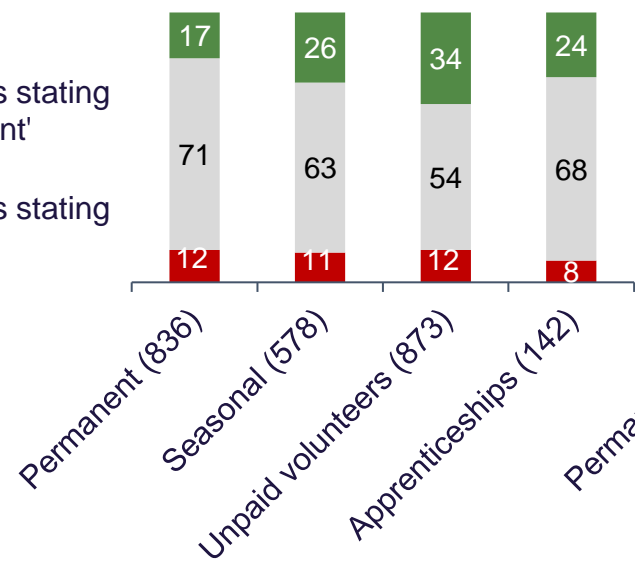
NET change (% increase minus % decrease) in staffing



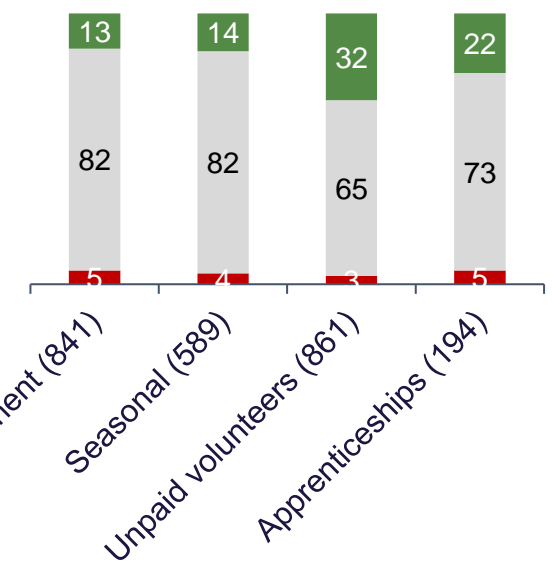
NET ('up' minus 'down')	+5%	+15%	+22%	+16%	+8%	+10%	+29%	+17%
-------------------------	-----	------	------	------	-----	------	------	------

- % of sites stating 'Up'
- % of sites stating 'Consistent'
- % of sites stating 'Down'

2022/23 Stated change in employees



Anticipated change in employees in 2024



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

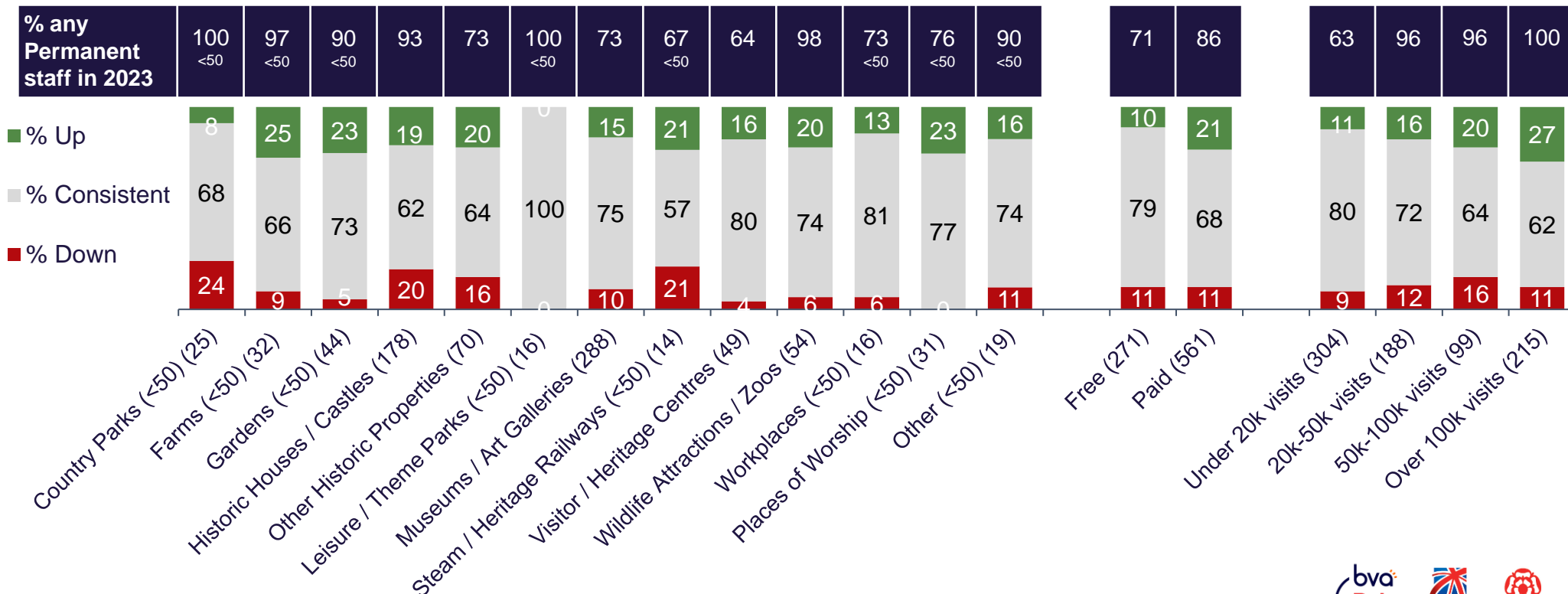
Permanent Employees: 2022 – 2023 trends

80% of attractions employed permanent staff members in 2023.

There was a net (% increasing minus % decreasing) increase in permanent staffing across all sizes of site, but this was more evident at the larger attractions. Paid sites were more likely to increase staffing levels than free sites.

Historic properties and steam/ heritage railways were polarized in their staffing changes with around a fifth of sites increasing permanent staffing levels, and a fifth reducing.

2022/23 Stated change in permanent employees



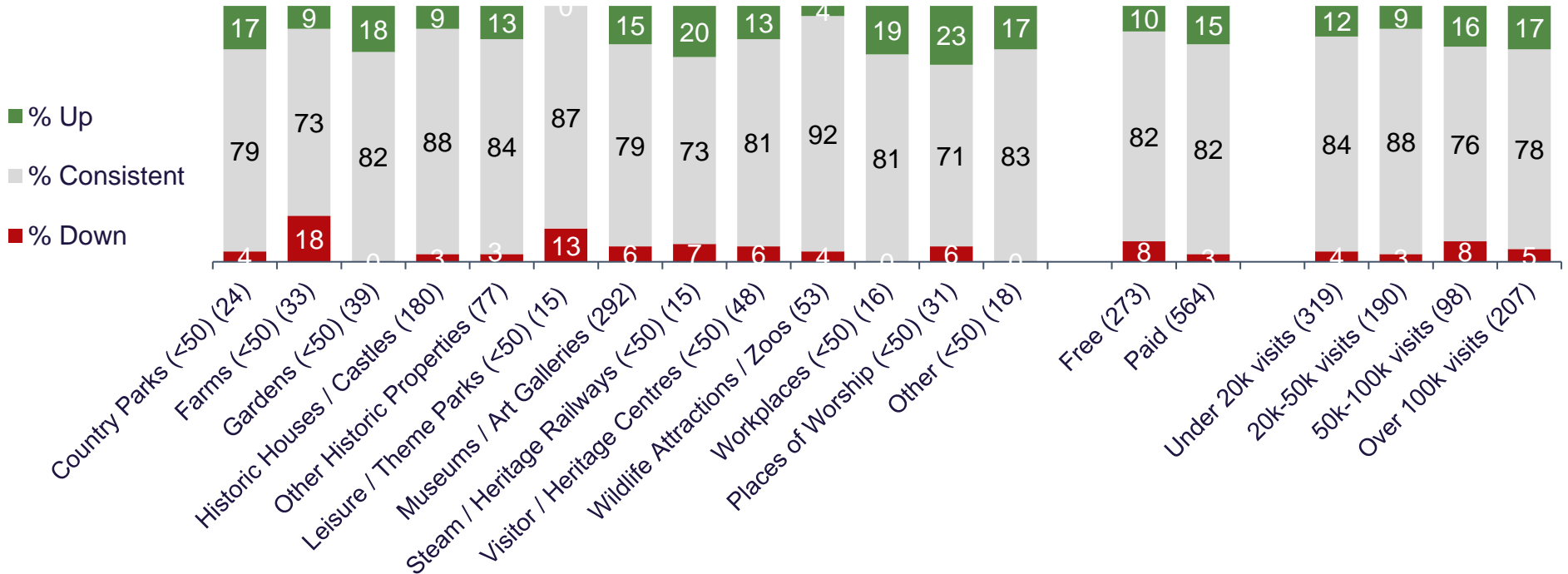
Base: Table: All answering employment questions (836): Chart: All with employees of this type
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Permanent Employees: 2024 Predictions

When looking ahead to 2024, most categories of attraction are expected to expand permanent positions; the exception is farms and leisure/ theme parks where permanent staffing may decline (though please note the small base sizes for these categories). Paid sites, and larger attractions are more likely to extend their permanent staffing in 2024.

Anticipated change in permanent employees in 2024



Base: All with employees of this type

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

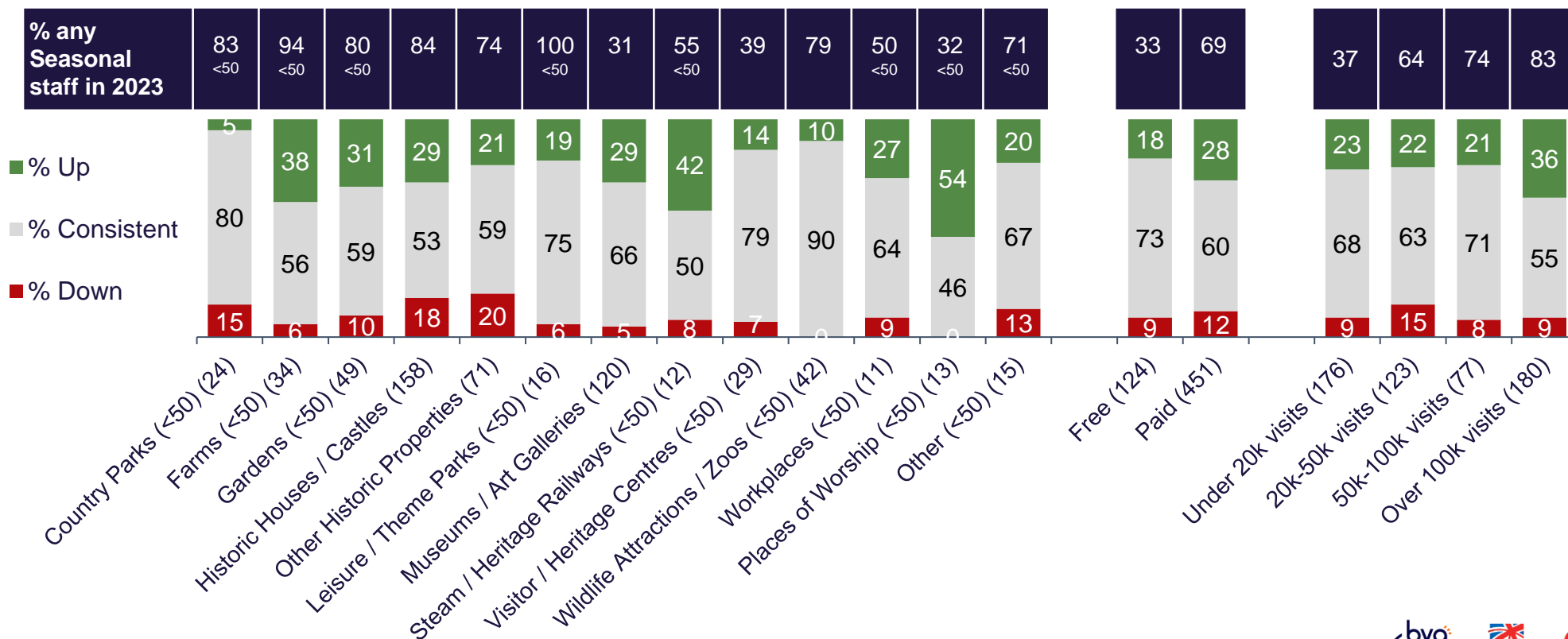
(<50) Base size below 50 (please treat with caution)

Seasonal Employees: 2022 – 2023 trends

56% of attractions employed seasonal staff in 2023.

With the exception of Country Parks, all attraction categories either increased or maintained seasonal staffing levels in 2023. Large sites (with over 100,000 visitors) and paid sites were more likely to increase staffing levels.

2022/23 Stated change in seasonal employees



Base: Table: All answering employment questions (578). Chart: All with employees of this type
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

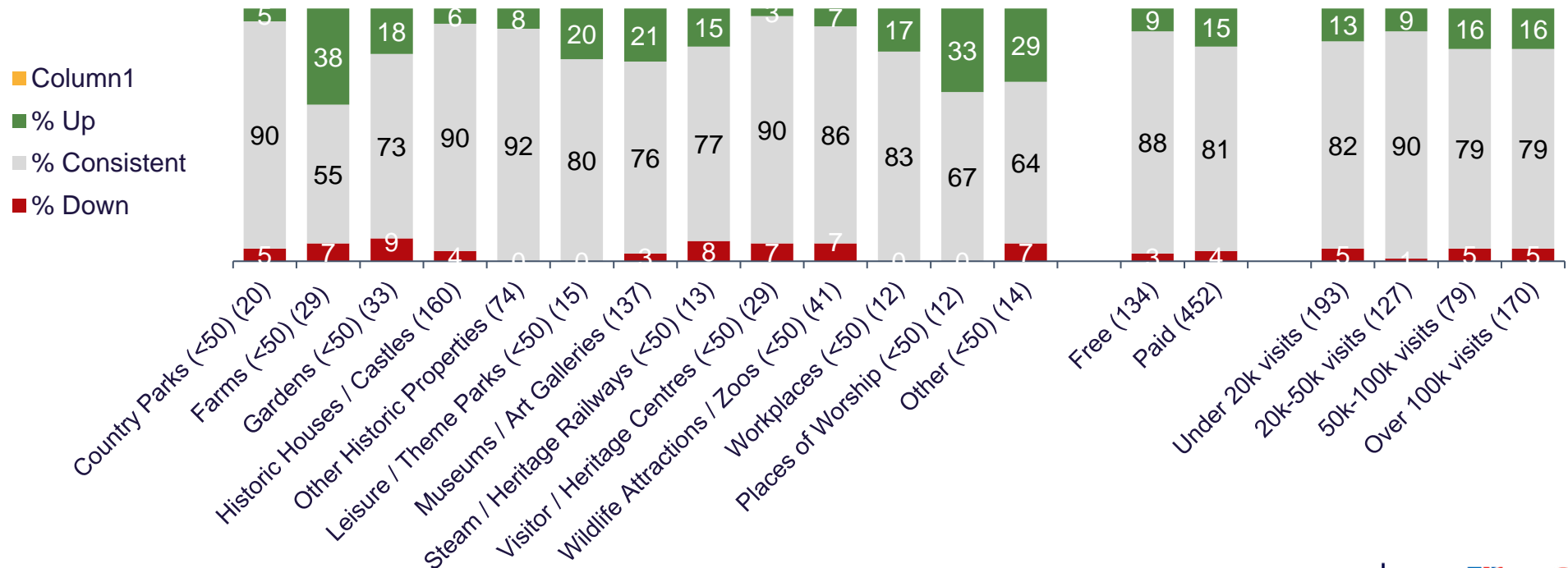
<50 Base size below 50 (please treat with caution)

Seasonal Employees: 2024 Predictions

We noted on slide 63 that farms and leisure/ theme parks both anticipate a reduction in permanent staffing levels – it seems they will be replaced by more seasonal staff, with a net increase (% increase minus % decrease) of 31% and 20% respectively.

Paid sites, and larger attractions are more likely to extend their seasonal staffing in 2024.

Anticipated change in seasonal employees in 2024



Base: All with employees of this type

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

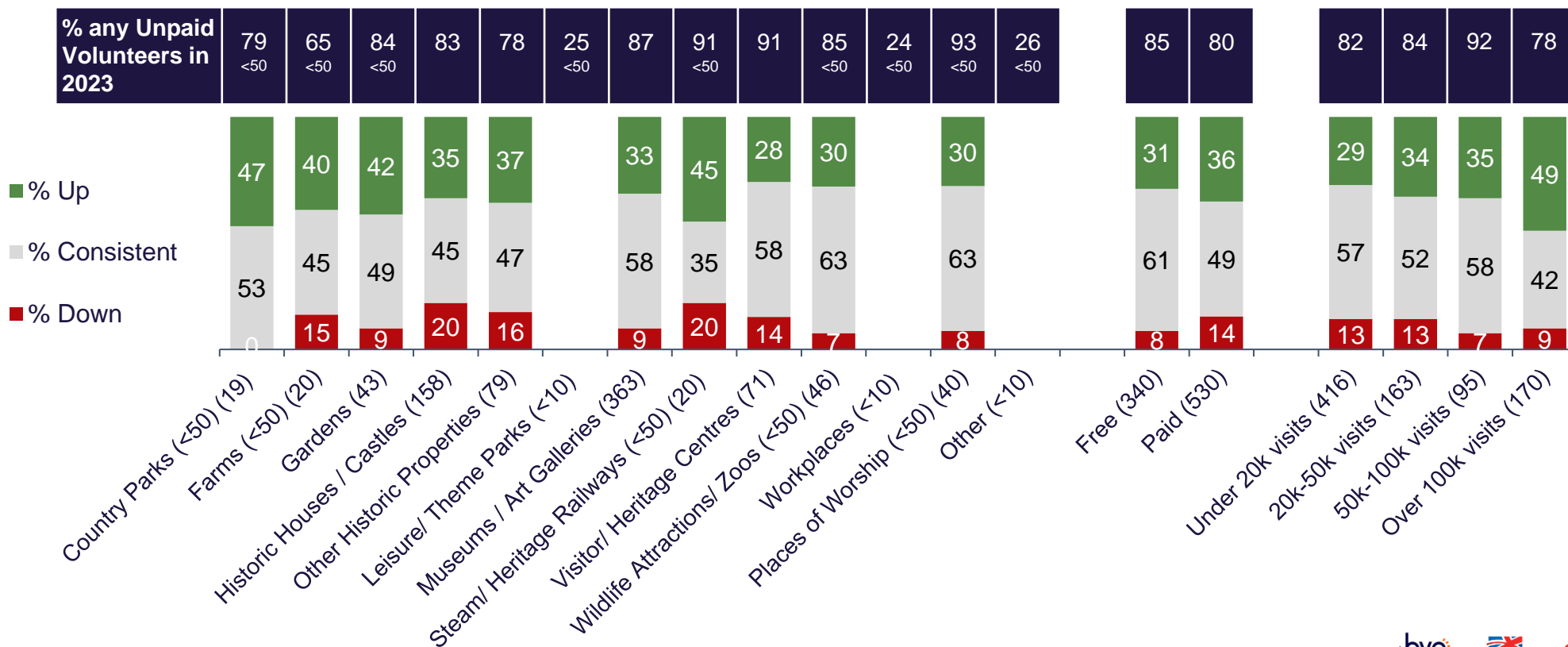
(<50) Base size below 50 (please treat with caution)

Unpaid Volunteers: 2022 – 2023 trends

82% of sites used unpaid volunteers in 2023.

Unpaid volunteers are essential to the running of many attraction categories with 82% of all attractions relying on their input. 2023 saw net growth in staff (% increasing minus the % decreasing) across all attraction categories, sizes and charging types. Large attractions with over 100,000 visits a year are more likely to employ staff to manage volunteers, so its not surprising that growth of the volunteer base is more common amongst these sites.

2022/23 Stated change in unpaid volunteers



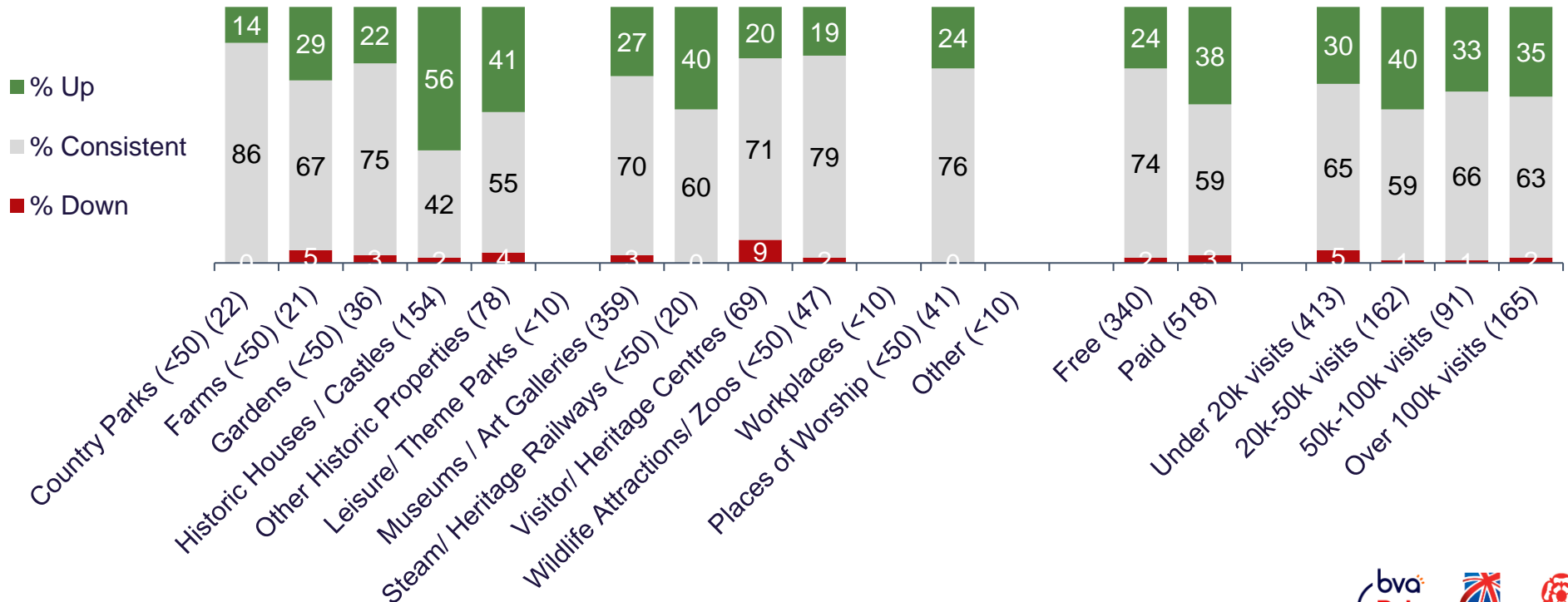
Base: Table: All answering employment questions (873): All with employees of this kind
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (please treat with caution)
 (<10) Base size below 10 (data not shown)

Unpaid Volunteers: 2024 Predictions

The number of unpaid volunteers is expected to increase across the board for 2023, particularly at historic properties and heritage railways. 56% of historic houses/ castles, 41% of other historic properties and 40% of steam/ heritage railways expect to increase their pool of volunteers in 2024.

Anticipated change in unpaid volunteers in 2024



Base: All with employees of this type

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

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

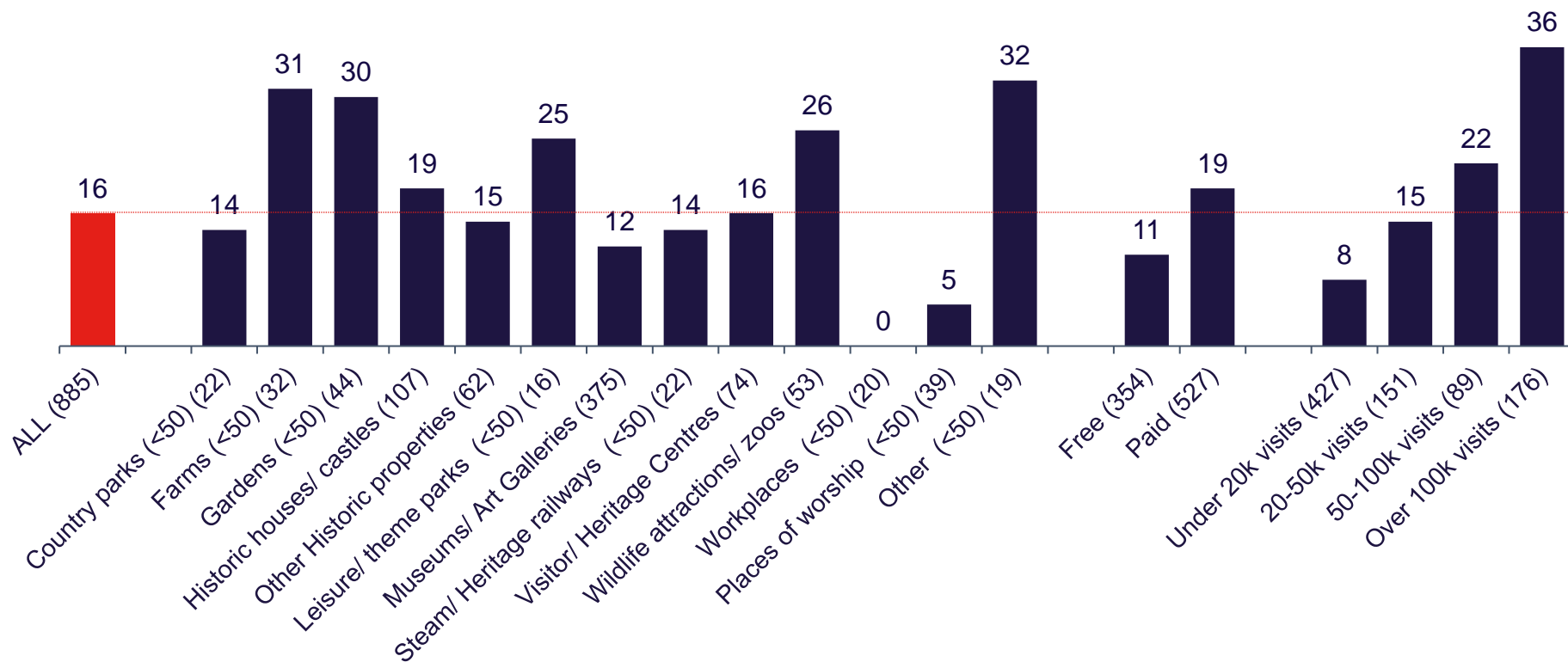
(<10) Base size below 10 (data not shown)

Apprenticeships

16% of attractions employed apprentices in 2023.

This becomes more common as the volume of admissions increases, with 36% of sites with over 100,000 visits a year employing apprentices.

% employing any apprentices in 2023



Base: Table: All answering employment questions (885)
 N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

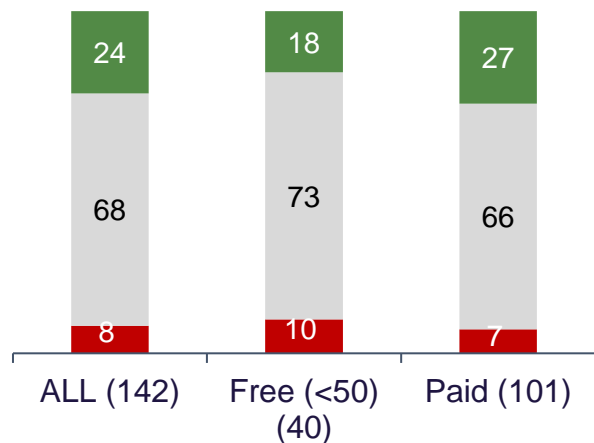
(<50) Base size below 50 (please treat with caution)

Apprenticeships: 2022-2023 Trends & 2024 Predictions

Based on expectations, the number of sites offering apprenticeships is set to grow by 31% over the next year. The number of apprenticeships offered is also likely to increase, building on the growth of this area of staffing seen from 2022 to 2023.

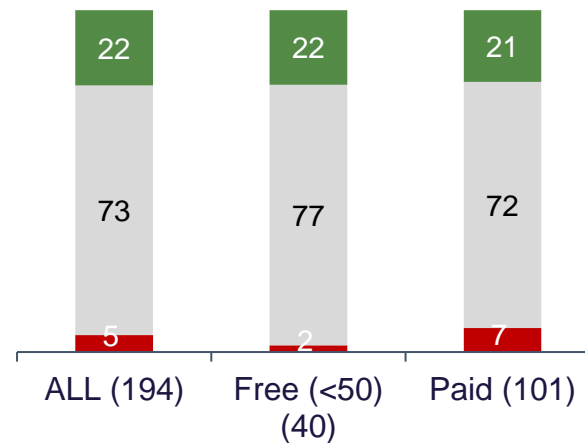
16% of sites offered apprenticeships in 2023

2022/23 Stated change in apprentices



21% of sites expect to offer apprenticeships in 2024

2024 anticipated change in apprentices



- % of sites stating 'Up'
- % of sites stating 'Consistent'
- % of sites stating 'Down'

Base: All with employees of this kind (142); All expecting to employ apprentices in 2024 (194) ^(<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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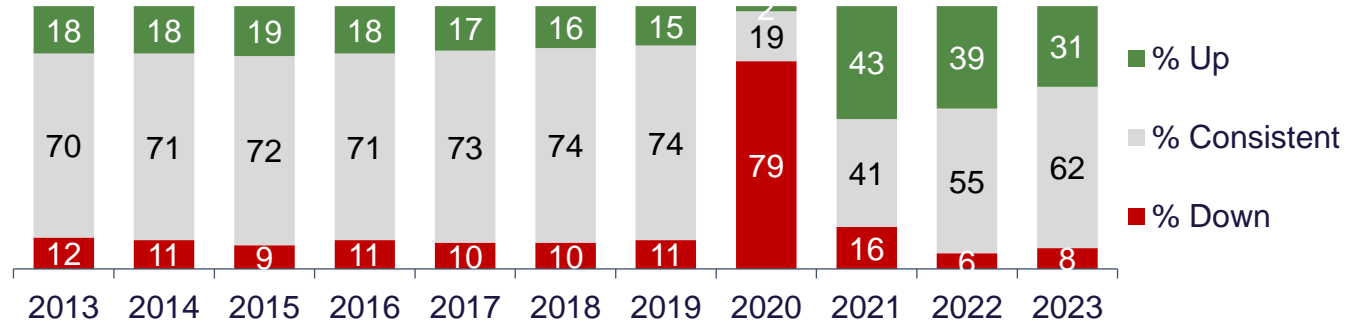
8. Marketing & communications trends

Marketing Expenditure Trend

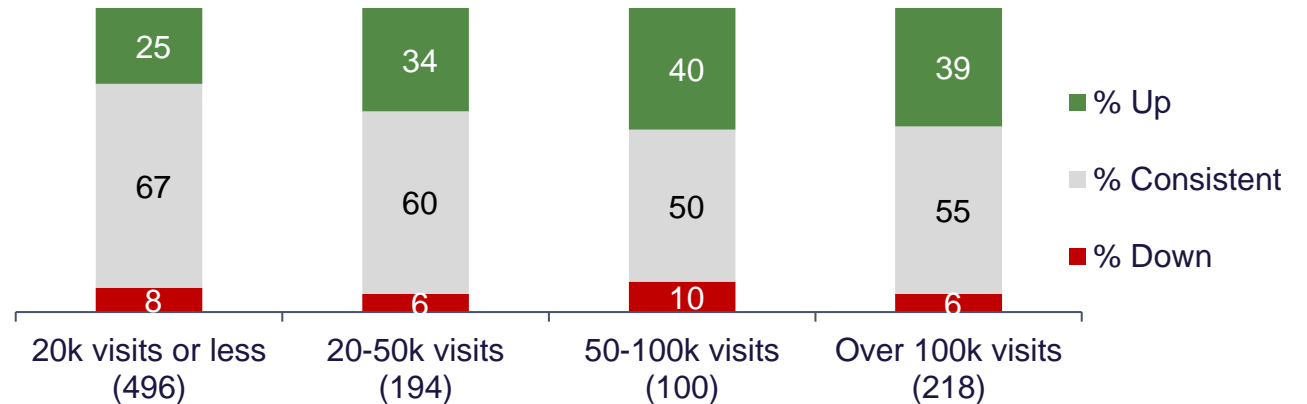
Marketing expenditure increased again in 2023, with 31% of attractions reporting an increase compared to their marketing budgets in 2022.

This shift was evident across all attraction sizes but was less marked at smaller sites, with less than 20,000 visits a year.

Trend in marketing expenditure



Trend in marketing expenditure by size of attraction

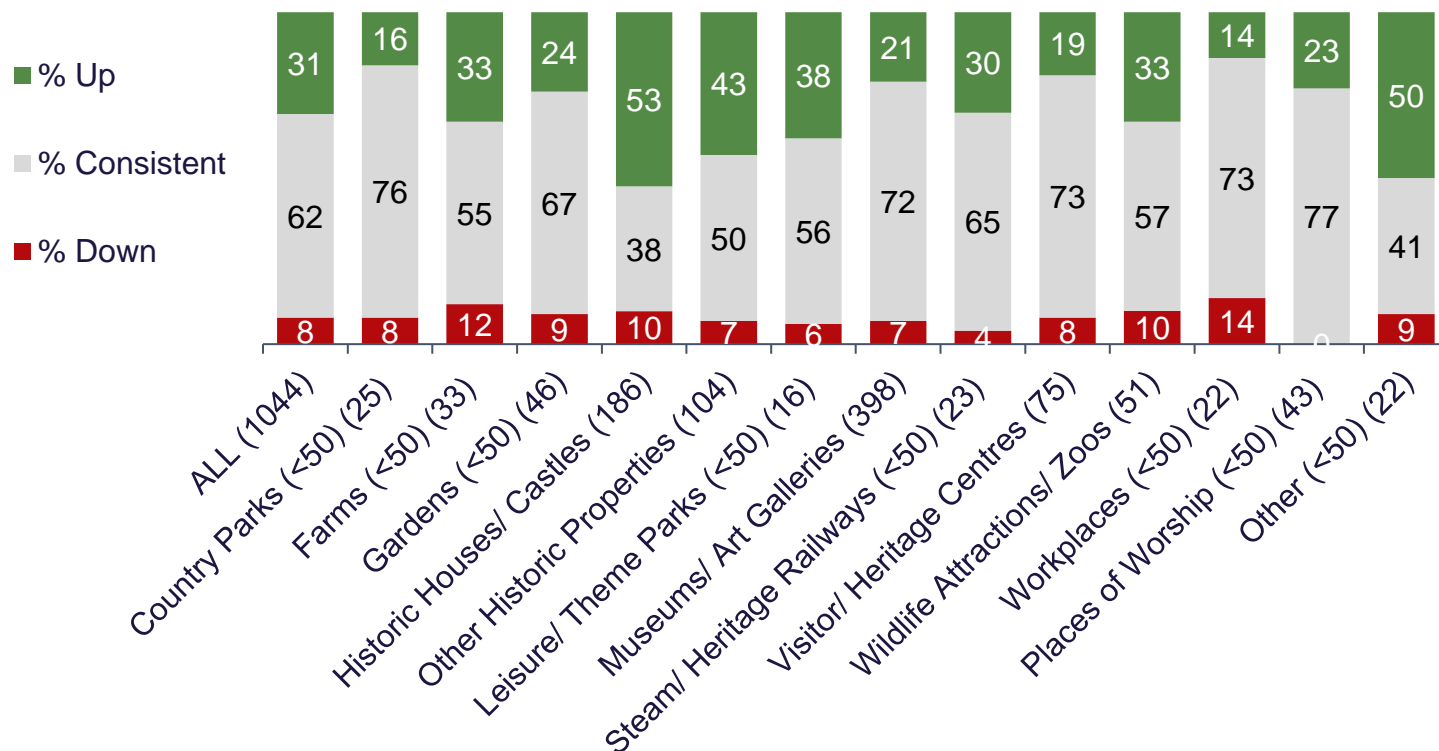


Marketing Expenditure Trends 2023: By Attraction Category

All attraction categories reported higher marketing budgets in 2023, with the exception of Workplaces, where the proportion of sites increasing their marketing budget was matched by those who reduced it.

Increased marketing spending was particularly notable at historic properties and 'other' attractions (such as piers or sports stand tours).

Trend in marketing expenditure by attraction category



Base: All answering marketing question (1044)

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

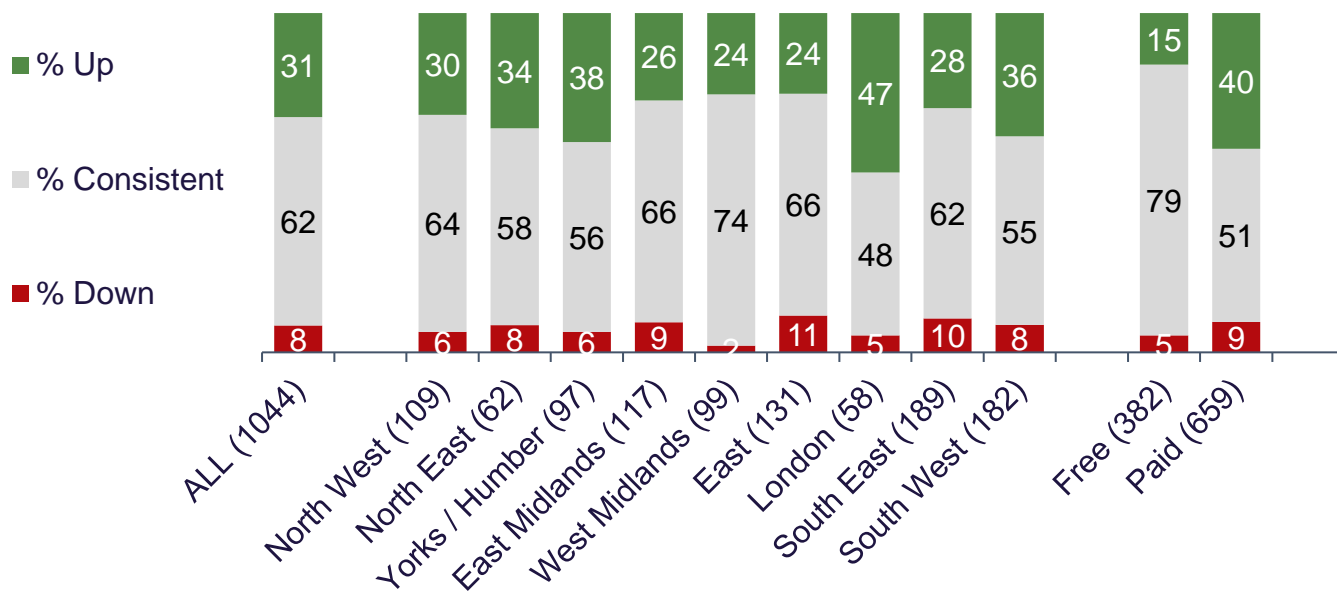
(<50) Base size below 50 (please treat with caution)

Marketing Expenditure Trends 2023: By Region & Admission Charge

Marketing budgets grew across all regions, but growth was highest in London, where 47% of sites reported an increase.

Consistent with previous years, paid attractions were more likely to increase budgets than free attractions.

Trend in marketing expenditure by region and admission charge



Base: All answering marketing question (1044)

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

Digital Communications Offered

Use of social media continues to grow, with 95% of visitor attractions using any social media or apps in 2023.

Sites typically use 3 forms of social media, with Facebook (91%) being the most common.

Use of Instagram or Pinterest has grown significantly, with 68% of attractions using one of these platforms in 2023, up from 61% in 2022. In contrast, use of X (formerly Twitter) has declined by 9 percentage points since 2020 (down from 64% to 55%).

Typically the larger the attraction, the greater the marketing resource and greater the use of digital communication platforms, but the main difference is between small attractions with less than 20,000 visitors and those with a higher visit volume.

Digital communication channels trend

	% offered in 2023	% offered in 2022	% offered in 2021	% offered in 2020
ANY Social/apps	95	94	92	90
Facebook page	91	90	89	88
Instagram/Pinterest	68	61	62	60
E-newsletter	58	53	55	51
X/ Twitter	55	62	61	64
YouTube	38	34	39	41
TikTok	22	24	NA	NA
Other social media	23	25	31	25
Mobile apps	16	18	19	18

Digital Communication channels by attraction size

% offered	20k or less (515)	20k-50k (199)	50k-100k (105)	Over 100k (236)
ANY Social/ apps	92	97	99	99
Facebook page	86	95	98	97
Instagram/Pinterest	52	80	87	89
E-newsletter	46	67	70	77
X/ Twitter	39	68	72	75
YouTube	25	47	47	58
TikTok	12	30	30	36
Other social media	21	29	28	23
Mobile apps	10	22	16	25

Base: All answering digital communications question (1100)

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

Digital Communications Offered in 2023: By Attraction Category

While Facebook is commonly used across the board, other social media varies from one category to another. Historic houses/ castles (driven by large membership organisations) and Leisure/ Theme Parks employ the broadest spread of digital communications.

Digital communication channels offered by attractions category

% offered	Country Parks (<50) (26)	Farms (<50) (35)	Gardens (51)	Historic houses / castles (195)	Other historic (107)	Leisure / theme parks (<50) (16)	Museum / art galleries (424)	Steam / heritage railways (<50) (23)	Visitor / heritage centres (77)	Wildlife / zoos (56)	Work-places (<50) (22)	Places of Worship (<50) (46)	Other (<50) (22)
ANY Social/ apps	92	100	96	96	93	94	95	96	92	96	100	83	95
Facebook	92	100	90	94	91	94	90	96	88	96	82	78	91
X/ Twitter	38	34	47	69	55	56	56	35	45	55	32	52	68
Instagram/ Pinterest	50	86	88	87	63	88	61	57	61	66	68	48	82
E-newsletter	50	60	59	68	61	63	56	43	47	55	55	57	64
YouTube	12	23	24	51	46	56	39	43	26	30	9	43	14
TikTok	*	23	14	46	34	63	12	17	4	34	5	7	23
Other social media	4	11	6	48	40	25	14	13	14	27	14	15	23
Mobile apps	12	3	14	45	32	19	4	*	6	16	*	11	9

Base: All answering digital communications question (1100)

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

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

* Figure less than 1



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9. Sustainability

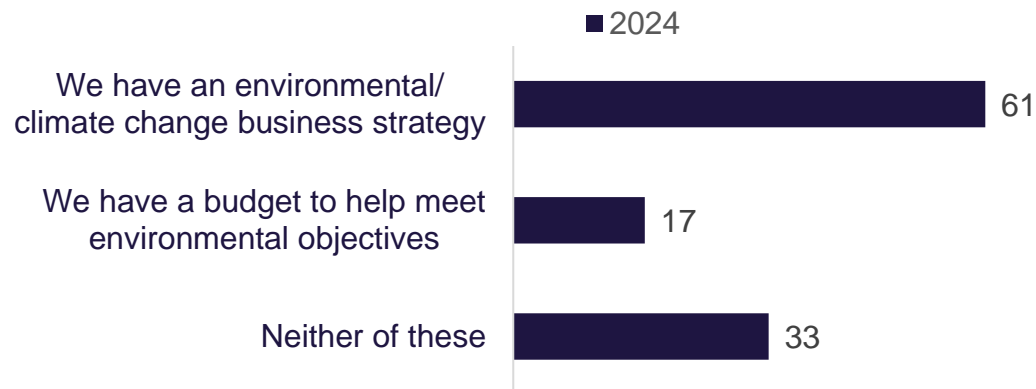
Sustainability Strategy: Overall, by Region and by Area Type

Attractions are conscious of their environmental responsibilities and 61% said that they have an environmental strategy in place.

However, it seems that financing this strategy may be a challenge, as only 17% have ring-fenced budget to meet their environmental objectives.

Sites in the East of England and North West are less likely to have any sustainability strategies in place than other regions.

Sustainability strategies in place [%]



Formal prioritisation of sustainability, by region and area type [%]

[%]	North West (63)	North East <sup>50 (48)	Yorks / Humber (62)	East Midlands (64)	West Midlands (63)	East (88)	London <sup>50 (40)	South East (105)	South West (114)	Free (228)	Charge (417)
Have an environmental business strategy	48	83	73	63	60	47	75	59	61	57	63
Have a budget to help meet environmental objectives	21	19	31	14	19	11	18	12	14	17	16
Neither	46	15	16	34	33	48	18	37	34	37	31

Base: All answering sustainability question (647)

<sup>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 Strategy: By Attraction Category

Due to the nature of the sites, it is unsurprising that Wildlife Attractions/ Zoos and Country Parks are the most likely categories to have a business focus on the environment.

There are a number of things that attractions can do to be more sustainable, and to encourage visitors to be more sustainable, without much investment, but lack of an assigned budget may be a limiting factor, especially for farms, museums/ galleries and steam/ heritage railways.

Formal prioritisation of sustainability, by attraction category [%]

[%]	Country Parks (<50) (16)	Farms (<50) (18)	Gardens (<50) (28)	Historic houses / castles (133)	Other historic (70)	Leisure / theme parks (<10)	Museum / art galleries (249)	Steam / heritage railways (<50) (12)	Visitor / heritage centres (<50) (38)	Wildlife / zoos (<50) (27)	Work-places (<50) (8)	Places of Worship (<50) (27)	Other (<50) (12)
Have an environmental business strategy	88	50	57	76	73	(<10)	47	42	58	85	50	81	50
Have a budget to help meet environmental objectives	33	11	36	15	7	(<10)	12	17	18	52	25	22	25
Neither	*	50	25	19	24	(<10)	49	50	34	7	38	19	42

Base: All answering sustainability question (647)

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

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

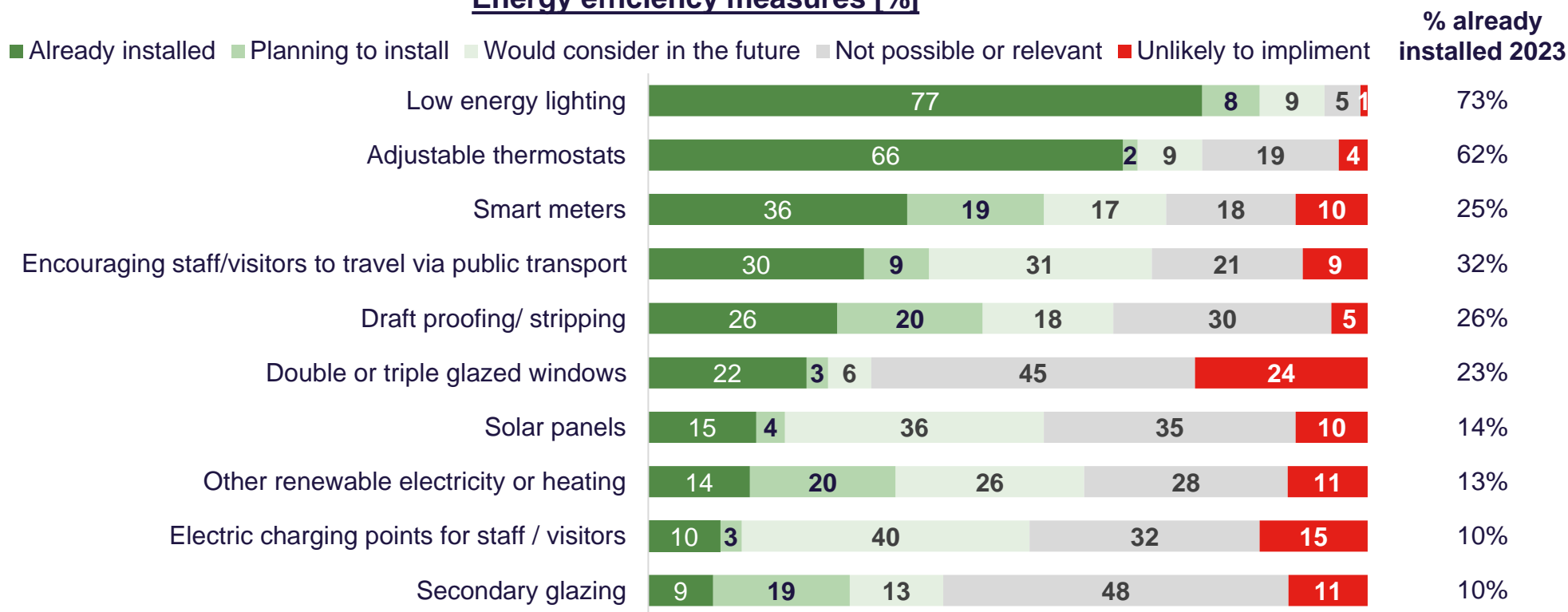
* Figure less than 1

Sustainability Action

Energy saving initiatives, such as low energy lighting and adjustable thermostats are popular amongst attractions and the majority of sites this is relevant to already have or are actively planning to install this. Installation of smart meters, to monitor energy use, is the fastest growing sustainability action, rising from 25% of sites in 2023 to 36% in 2024.

The greatest opportunities for further (unplanned) sustainable actions are in the provision of electric charging points for staff/ visitors, installation of solar panels and encouraging visitors/ staff to travel via public transport.

Energy efficiency measures [%]



Investment in Energy Saving/ Carbon Footprint Reduction

Over a quarter of attractions invested in energy saving/ carbon reduction during 2023, but this rose to 63% of large attractions (with over 200k admissions). Places of worship, farms and wildlife attractions were the most likely to have taken action.

27%

of sites invested in changes to the fabric of their building or specialist equipment to save energy/ reduce carbon footprint in 2023.

Investment in energy saving/ carbon footprint reduction in 2023 (%)

	2023 (%)
20,000 or less (280)	18%
20,000 – 100,000 (197)	26%
100,000 - 200,000 (28)	32%
Over 200,000 (75)	63%

Investment in energy saving/ carbon footprint reduction in 2023 (%)

	2023 (%)
Country Parks (16) ^{<50}	38%
Farms (17) ^{<50}	59%
Gardens (28) ^{<50}	36%
Historic Houses/Castles (133)	18%
Other Historic Properties (68)	9%
Leisure/Theme Parks ^{<10}	(^{<10})
Museum/Art Galleries (242)	27%
Steam/Heritage Railways (12) ^{<50}	33%
Visitor/Heritage Centres (37) ^{<50}	24%
Wildlife Attractions/Zoos (25) ^{<50}	44%
Workplaces ^{<10}	(^{<10})
Places of Worship (25) ^{<50}	52%
Other (12) ^{<50}	25%

Base: All answering carbon footprint questions (632)

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

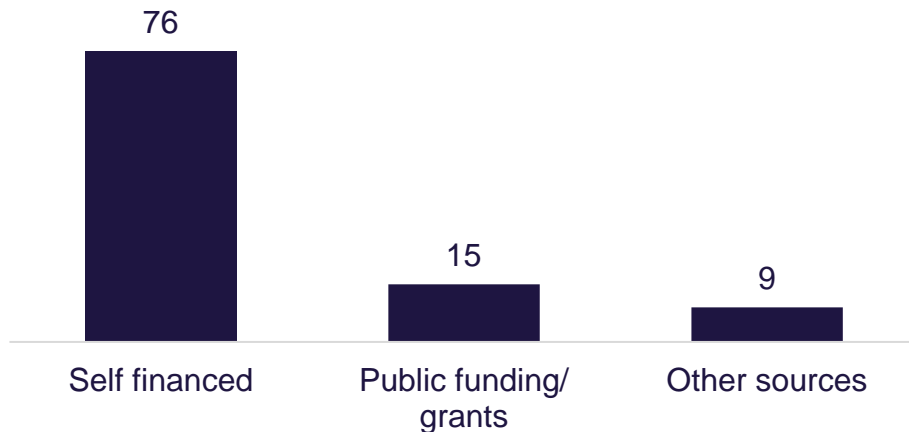
^{<50} Base size below 50 (please treat with caution)

^{<10} Base size below 10 (data not shown)

Financing of energy saving/ carbon reduction

The majority of energy saving/ carbon footprint reduction measures were self-financed, even though over half of sites were aware of the government funding available to support with this.

Source of financing for energy saving/ carbon reduction measures (%)



Awareness of funding options provided by the UK government to support installation of energy saving measures (%)

	2023 (% aware)
ALL (490)	56%
20,000 or less (230)	51%
20,000 – 100,000 (139)	55%
100,000 - 200,000 (49) ^{<50}	61%
Over 200,000 (59)	69%

Base: All answering carbon footprint questions who invested in energy saving/ carbon reduction measures in 2023 (168)
 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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10. Accessibility Provisions

Accessibility Provisions 2022

Over half of attractions investing in provisions during 2023. The most common is in staff training, with 2 in 5 sites including this within their training schedule; just over a fifth made changes to their built environment/ amenities/services (22%) and a similar proportion improved the accessibility of their communications (19%).



53%

of sites invested in one of these enhancements to their accessibility provision in 2023.

Accessibility provisions provided or planned [%]

[%]	Have done in previous 12 months	Clear plans for the next 12 months	Clear plans for further ahead	Are considering, but no firm plans	No plans to consider this at the current time
Improve the built environment, amenities and services for visitors with accessibility requirements	22	14	27	19	18
Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements	40	12	7	21	20
Improve the information, marketing and digital inclusion for visitors with accessibility requirements	19	22	21	22	15

Base: All answering Accessibility provisions question (633)

<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

Sample & Response (1)

VisitEngland periodically reviews the attractions listing to refine this in light of the Visitor Attractions Definition. Two new attraction categories were added in 2024 to reflect changes in the sector:

- Permanent multi-sensory experiences (excluding immersive theatre/ cinema/ gaming/ dining)
- Extreme sports experiences in purpose-built venues (e.g. snowdome, indoor skydiving, inland surfing)

VisitEngland no longer rigorously monitors attractions openings and closures. The England attractions database is updated using Destination Management Organisation updates on attractions in their areas, site feedback and based on sector news of attraction openings/ closures.

VisitEngland holds a database of 5791 visitor attractions in England, of which 465 have told us that they are unable to take part (e.g. because they are unmanned sites with no means of answering the survey questions, or it is company policy not to share data).

The remaining 5,326 English visitor attractions were invited to take part in this year's survey.

1513 (28% of) English visitor attractions responded to the survey in 2024, of which 81 sites had either permanently or temporarily closed. Responses were provided as follows:

937 completed online

133 completed by post

443 provided data through umbrella organisations

1,386 sites were open and provided 2023 visitor numbers.

1,334 sites were open and provided visitor numbers in both 2022 and 2023 and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response (2)

The admission size groupings of attractions responding is now close to 2019 levels, following a couple of years of disruption to the profile associated with the COVID-19 pandemic.

Response by attraction size

Category	No. of attractions giving 2023 & 2022 data	2023 profile of attractions providing data*	2022 profile of attractions providing data*	2019 profile of attractions providing data*
10,000 or less	417	31%	32%	29%
10,001 – 20,000	171	13%	13%	12%
20,001 – 50,000	232	17%	18%	19%
50,001 – 100,000	142	11%	11%	11%
100,001 – 200,000	152	11%	11%	11%
Over 200,000	220	16%	15%	18%
Base size	1334	1334	1295	1152

* Based on sites providing data for the year before as well (e.g. when providing 2023 data, they also provided 2022 data).

Sample & Response (3)

Sample profile for attraction category remains in line with what we have seen in previous years.

Response by attraction category

Category	No. attractions open and providing data for 2023 & 2022	2023 profile of attractions providing data*	2022 profile of attractions providing data*
Country Parks	46	3%	4%
Farms	35	3%	2%
Gardens	71	5%	6%
Historic Properties	442	33%	32%
Leisure / Theme Parks	15	1%	1%
Museums / Art Galleries	474	36%	35%
Steam / Heritage Railways	21	2%	2%
Visitor / Heritage Centres	79	6%	6%
Wildlife Attractions / Zoos	63	5%	5%
Workplaces	21	2%	2%
Places of Worship	44	3%	3%
Other	23	2%	2%
Base size	1334	1334	1295

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 2023 data, they also provided 2022 data).

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 2023 & 2022 data	2023 profile of attractions providing data*	2022 profile of attractions providing data*
North West	144	11%	10%
North East	89	7%	7%
Yorks/Humber	122	9%	9%
East Midlands	129	10%	9%
West Midlands	132	10%	10%
East	163	12%	12%
London	85	6%	7%
South East	241	18%	19%
South West	229	17%	17%
Base size	1334	1334	1295

Response by area type

Category	No. of attractions giving 2023 & 2022 data	2023 profile of attractions providing data*	2022 profile of attractions providing data*
Coastal	162	12%	12%
Rural	709	53%	52%
Urban	463	35%	36%
Base size	1334	1334	1295

Response by admission type

Category	No. of attractions giving 2023 & 2022 data	2023 profile of attractions providing data*	2022 profile of attractions providing data*
Free	438	33%	32%
Paid	896	67%	68%
Base size	1334	1334	1295

* Based on sites providing data for the year before as well (e.g. when providing 2023 data, they also provided 2022 data).

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
Extreme sports experiences	Extreme sports activities at purpose-built venues, such as a snowdome, indoor skydiving centre or inland surfing centre. This excludes activities primarily used by hobbyists.
Farm/ Rare Breeds/ Farm animals	Attractions involving enclosed farm animals
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
Multi-sensory experiences	Permanent multi-sensory experience at a fixed location. Excludes immersive theatre/ or 4D cinema showings, gaming and experiences centred around dining or drinking.
Place of Worship	Attractions of any religion that are <u>still in use</u> as places of worship, Churches, Chapels (excluding worshippers)
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.
Nature Reserve/ Wetlands/ Wildlife trips	Attractions that contain natural habitat environments for fauna, birds and wildlife, including wildlife trips
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

Multi-sensory experience (permanent)

Extreme sports experience

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 2022, 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 2022 visitor numbers:

2.2 What were your visitor numbers during the 2023 Calendar Year? (Please exclude special events outside normal opening hours or any private hire). Total visitor numbers (paid and free)

2.2b Are these numbers: Exact? / An Estimate?

2.2c If you are able, please provide the breakdown of visitor numbers by month.

2.3 What percentage of total visitors in 2023 (paid and free) fell into each category? Adults % / Children % = Total 100%

2.4 For 2022, 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 2023? Number of schoolchildren

Is this number: Exact? / An Estimate?

2.5 Did you charge for admission to the main attraction in 2023? No / Yes

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction...

(a) in 2023 (including VAT): Adult / Child

(b) In 2022 (including VAT): Adult/ Child

2.7 Origin of Visitors: For 2022, your organisation provided us with a visitor profile of % from UK/ % from overseas. What percentage of total visitors in 2023 do you estimate were...?

(ai) Domestic (live in the UK)

(aii) From overseas

(bi) Compared with 2022, was the number of domestic visitors in 2023: Up / Down / Similar

(bii) Compared with 2022, was the number of visitors from overseas in 2023: Up / Down / Similar

2.8 i) What percentage of your total visitors in 2023 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %

ii) Compared with 2022, was the number of family group visitors in 2023: Up / Down / Similar

Questionnaire: Operations/ Marketing

3.1 Gross revenue

a) How did the attraction's gross revenue in 2023 compare with 2022? Up / Down / Similar

b) What was the percentage increase / decrease? %

3.2 Compared with 2022, was expenditure on marketing activities in 2023: Up / Down / Similar

3.3 Which of the following digital communications did your main attraction offer in 2023?

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

3.4 Many attractions have been affected by the increase in inflation and rising costs in 2023. What impact, if any, has this had on your site?

	No impact/ not relevant to site	Had to increase costs to visitors	Reduced income for site	Had to remove/ reduce certain services
Rising energy costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rising wages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rising supplier costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questionnaire: Human Resources

4.1 Compared with 2022, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2023 (including yourself, working owners and self employed)...?:

Permanent: Up / Down / Similar / None

Seasonal: Up / Down / Similar / None

Unpaid volunteers: Up / Down / Similar / None

Apprenticeships: Up / Down / Similar / None

4.2 How many staff of each type did your attraction employ in 2023, during the peak part of the year?

Permanent/ Seasonal/ Unpaid volunteers/ Apprenticeships

4.3 And compared with 2023, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2024 to be:

Permanent: Up / Down / Similar / None

Seasonal: Up / Down / Similar / None

Unpaid volunteers: Up / Down / Similar / None

Apprenticeships: Up / Down / Similar / None

4.4 Are you back to pre-pandemic staffing levels?

Yes/ No/ Don't know

IF 4.4=NO (STAFFING NOT BACK TO PRE-PANDEMIC LEVELS)

4.5 What is the main reason that staffing is not back to pre-pandemic levels?

Budgetary limitations

Difficulty in attracting the right candidate(s)

Other (WRITE IN)

Questionnaire: Accessibility & Sustainability

5.3 Thinking about accessibility provisions at your attraction, have you recently made or are you planning to...

- a) Improve the built environment, amenities and services for visitors with accessibility requirements
- b) Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements
- c) Improve the information, marketing and digital inclusion for visitors with accessibility requirements

Have done in previous 12 months

Clear plans for the next 12 months

Clear plans for further ahead

Are considering, but no firm plans

No plans to consider this at the current time

5.4 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

5.5 You will now be shown several energy saving/ retrofit measures. For each, please tell us whether your site already has this, or would consider installing or implementing it in the future.

Already installed or implemented / Already planned or budgeted implementation / Would consider installing or implementing in future /

Not possible or relevant at this site / Unlikely to implement for other reasons

- a) Adjustable thermostats
- b) Low energy lighting
- c) Draft proofing/ stripping
- d) Double or triple glazed windows
- e) Secondary glazing
- f) Solar panels
- g) Smart meters
- h) Other renewable electricity or heating
- i) Electric charging points for staff/ visitors
- j) Encouraging staff/ visitors to travel via public transport

Questionnaire: Sustainability

ASK ALL

5.6 Did you invest in any changes to the fabric of your building or specialist equipment to save energy or reduce your carbon footprint in 2023?

Yes/ No

IF YES

5.7 How did you finance these measures?

Self-financed/ Public funding/grants/ Other sources (WRITE IN)

IF PUBLIC FUNDING/ GRANT AT 5.7

What is the name of the public funding option/grant that you used?

WRITE IN

IF NOT PUBLIC FUNDING/ GRANT AT 5.7

Were you aware about the funding options provided by the UK government to support installation of energy saving measures?

Yes/ No