Visitor Attraction Trends in England 2020
Full Report

August 2021

Contents

Acknowledgements

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

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

VisitEngland is grateful to Historic England for their financial support for the 2021 survey.

Historic England

August 2021

Introduction

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

Objectives

To monitor trends in the visitor attraction sector in England and to improve understanding of the dynamics of the sector. Findings contribute to estimates of the economic impact of tourism and inform development and planning work. Results allow operators to benchmark their operation within their category, within their region and across the sector as a whole.

Survey Method

Attractions have the option of either online or postal survey completion.

All attractions for whom email contacts are held are sent an email invitation with a link to their attraction's online questionnaire. Attractions not responding are subsequently sent a postal questionnaire alongside attractions with no or only generic email contacts.

A copy of the questionnaire is appended.

BVA BDRC holds the contract for the survey in England and is responsible for the preparation of this report.

It is important to highlight that major individual attractions can have a strong impact upon the proportion of visits within each region and attraction category. Their participation or non-participation in the survey year-on-year can result in large fluctuations in the data within each region and attraction category.

Visitor Attraction Definition

"…an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc."

Sample & Response (1)

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

- In 2018 organisations that are primarily a retail outlet, but which have an attraction element (unless separate figures could be provided for the attraction element alone) were removed from the attractions list.
- In 2013 parish churches and small art galleries with a retail focus were removed.

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

VisitEngland no longer rigorously monitors attractions openings and closures. The England attractions database was updated in 2020 using Experian business data and Birkbeck University's Museums Mapping database. This data was de-duplicated against the existing attractions database and closed sites were removed. Other sources, such as sector news, are also used to update the database with attraction openings and closures each year.

5,742 English visitor attractions were invited to take part in this year's survey.

1301 (23% of) English visitor attractions responded to the survey on 2020, of which 130 had either permanently or temporarily closed. Responses were provided as follows:

423 completed online

363 completed by post

515 provided data through umbrella organisations

1,036 sites were open and provided 2020 visitor numbers. 984 attractions also provided admissions for 2019 and these attractions form the basis of this report's visitor trend evaluation.

Sample & Response (2)

Response by attraction category

Category	No. attractions providing data for 2020 & 2019	2020 profile of attractions providing data	2019 profile of attractions providing data
Country Parks	21	*2%*	*3%*
Farms	19	*2%*	*2%*
Gardens	61	*6%*	*7%*
Historic Properties	362	*37%*	*36%*
Leisure / Theme Parks	9	*1%*	*1%*
Museums / Art Galleries	338	*34%*	*33%*
Steam / Heritage Railways	26	*3%*	*2%*
Visitor / Heritage Centres	45	*5%*	*5%*
Wildlife Attractions / Zoos	43	*4%*	*4%*
Workplaces	13	*1%*	*1%*
Places of Worship	31	*3%*	*3%*
Other	16	*2%*	*3%*
Total	**984**		

Sample & Response (3)

Response by region

Category	No. of attractions giving 2020 & 2019 data	2020 profile of attractions providing data	2019 profile of attractions providing data
North West	113	*11%*	*10%*
North East	63	*6%*	*7%*
Yorks/Humber	91	*9%*	*9%*
East Midlands	87	*9%*	*9%*
West Midlands	87	*9%*	*9%*
East	122	*12%*	*14%*
London	80	*8%*	*7%*
South East	184	*19%*	*19%*
South West	157	*16%*	*17%*
Total	**984**		

Response by location type

Category	No. of attractions giving 2020 & 2019 data	2020 profile of attractions providing data	2019 profile of attractions providing data
Coastal	107	*11%*	*13%*
Rural	494	*50%*	*53%*
Urban	383	*39%*	*35%*
Total	**984**		

Response by admission type

Category	No. of attractions giving 2020 & 2019 data	2020 profile of attractions providing data	2019 profile of attractions providing data
Free	320	33%	34%
Paid	664	67%	66%
Total	**984**		

BVA BDRC VisitBritain VisitEngland

Sample & Response (4)

Visitor numbers in 2020 were significantly affected by the COVID-19 pandemic and associated closure of many attractions during at least part of the year. Some locations and categories of attractions were affected worse than others as you will see in this report.

Categorising sites by their 2020 admissions figure would significantly skew the data compared with previous years and would not be representative of sites' normal status. This report therefore uses 2019 admissions figures for categorization by site size.

Taking this approach we still see a shift in attraction size, with fewer sites with 10,000 visitors or less (23% vs. 29%). This is because temporary and permanent site closures are most common amongst smaller attractions, with 77% of the site closures recorded through this survey falling into the under 10,000 visitors category.

Response by attraction size

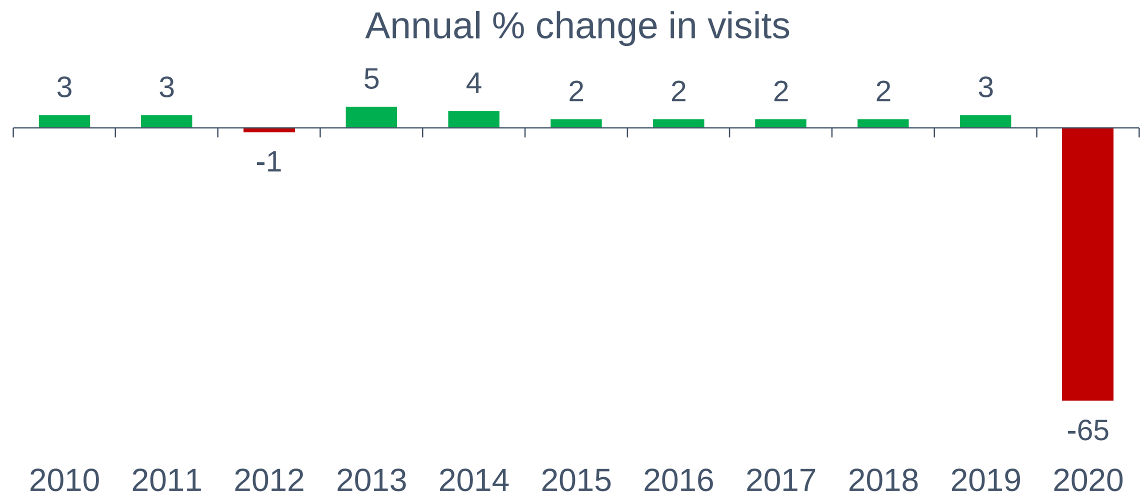
Category	No. of attractions giving 2020 & 2019 data*	2020 profile of attractions providing data*	2019 profile of attractions providing data
10,000 or less	224	*23%*	*29%*
10,001 – 20,000	133	*14%*	*12%*
20,001 – 50,000	195	*20%*	*19%*
50,001 – 100,000	120	*12%*	*11%*
100,001 – 200,000	113	*11%*	*11%*
Over 200,000	199	*20%*	*18%*
Total	**984**		

* Based on sites' 2019 admission data.

Headlines

2020 Visitor Attraction Trends

Attractions in England reported a -65% decrease in total visits from 2019 to 2020 – a level of change unparalleled in any previous years.



-6%

Adult admission fees decreased following several years of inflation.

-55%

Gross revenue at attractions decreased in 2020 by -55%, a slightly smaller decline than we see for admissions.

2020 drop in visit volume was evident across all attraction types, but indoor attractions were the worst hit.

Mostly Indoors	-76%
Evenly mixed indoor / outdoor	-65%
Mostly outdoors	-43%

Headlines: Attraction Opening During COVID-19

The COVID-19 pandemic had a significant impact on visitor attractions, with 1 in 10 stating that they were closed or had no visitors in 2020.

Indoor attractions were worse hit than outdoor sites, with ‘visitor / heritage centres’ and ‘other historic properties’ showing particularly high levels of closures at 16% and 19% respectively.

Coastal and rural areas reported more closures than urban areas, possibly due to the more seasonal nature of the non-urban attractions.

Over a third of the remaining attractions were unable to open for their typical visitor seasons once national restrictions were lifted. This was predominantly driven by continued restrictions due to regional lockdowns and difficulties in meeting the requirements to open safely during the pandemic, although profitability and a lack of staff/ volunteers also came into play.

Typically nearly three quarters of attractions are open in March, but this reduced to less than half in 2020, and only 5-6% were able to remain open in April to May providing public access for exercise. This rose slowly to a peak of 70% of attractions open in September, but this still remained 27% down compared with 2019 opening.

The average reduction in admissions in order to comply with new safety and social distancing regulations was 46% of 2019 maximum capacity. To manage this nearly three in four sites needed to introduce additional measures, for example online booking.

86% of attractions put additional health and safety measures in place, with provision of hand sanitiser, enhanced cleaning regimes, enforced social distancing and contactless check-in/ payments being the most common.

Headlines: Admissions

Overall, attractions in England reported a -65% annual decrease in total visits from 2019 to 2020, driven by the COVID-19 pandemic. The decline was caused by site closures and opening restrictions associated with lockdown, as well as contraction of international and domestic tourism and domestic days out.

The fall in visitor numbers was most marked for museums and galleries, other historic properties, places of worship and other attractions, with **country parks showing the smallest decrease in visits (-7%).**

There was significant variation among regions in terms of visitor number trends, from -40 in the East to -77% in London. London's greater reliance on international tourism means it was hardest hit by the pandemic, with lower confidence in using public transport also a factor. Attractions in the North East and North West also averaged larger declines, associated with local lockdowns in these areas.

Indoor attractions reported a larger decline in admissions than outdoor (-76% vs -43%) partly due to lockdown restrictions delaying opening of indoor attractions, but also related to lower consumer confidence in indoor sites.

Rural sites fared best during the pandemic, with admissions dropping by -47%, compared with -74% for urban sites.

While the volume of children visiting attractions decreased by -61% (slightly less than overall admissions), school visits fell by -84%.

Visit Britain's inbound statistics estimate a -73% decline in international visits to the UK in 2020 compared with 2019*. International visits to attractions have dropped by even more than this, to -93%.

In contract, domestic day visits only fell by half.

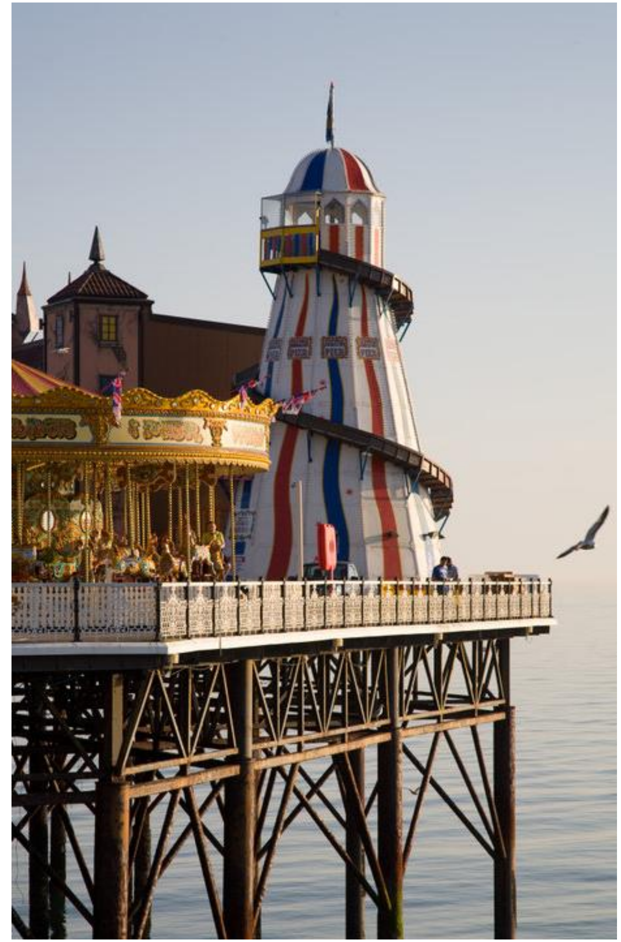


*Figure taken from Visit Britain's forecasts

Headlines: Revenue & Admission Pricing

Admission prices decreased in 2020 following several years of inflation – driven by a reduction in top end prices. Only 23% of attractions were charging £10 or more, an 8% drop on 2019. This is likely to be temporary and associated with a reduced offer due to COVID-19.

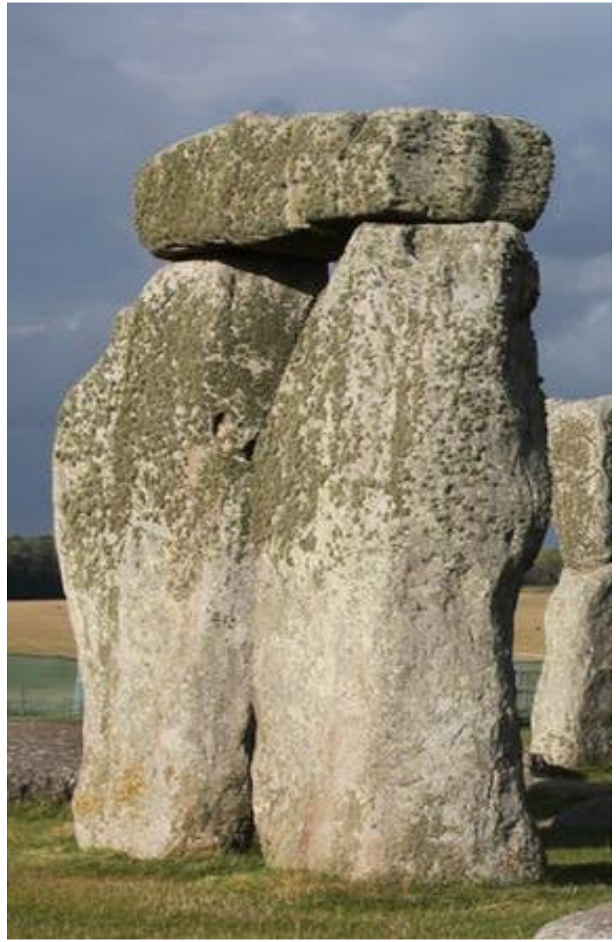
The drop in prices was driven by historic houses/castles as well as gardens and associated with closure of key features (e.g. historic houses and glasshouses). Reductions were highest in the West Midlands, and fell across all areas bar North East and Yorkshire, which saw modest increases.

As in previous years, more popular sites were able to command a higher entrance fee in 2020. However, attractions with fewer than 50,000 visitors increased adult prices by +4%, while larger attractions chose to reduce entrance fees in 2020, most likely due to a reduced offer.

Overall, gross revenue decreased by -55% in 2020. This decline is smaller than the drop in admissions (-65%), due to a lower drop of income from other sources and additional income generated through other activities and funding. As with admissions, indoor attractions report the largest overall decline in gross revenue.

The fall in revenue is evident across all regions, with London the worst hit (-67%) and Yorkshire & The Humber performing the best (-35%).

Revenue from donations was down for 65% of visitor attractions in 2020 and 56% of sites reported a decline in gift aid revenue. In both cases it was smaller sites with less than 10,000 visitors a year, that were the worst hit.



Headlines: Marketing & Digital Communication

Site closure rendered standard marketing promotion redundant across a substantial proportion of the year. As such we saw marketing budgets reassigned, with 79% of attractions reducing spend compared with 2019.

96% of attractions used digital communications to communicate with their audience during the pandemic, a 6% increase on 2019. Facebook (88%) and Twitter (64%) continue to be the dominant social media platforms but their penetration as a tool for attractions has plateaued.

In contrast YouTube saw the biggest increase, with 41% of attractions leveraging this tool in 2020, up from 33% in 2019.

70% developed their digital offer to strengthen their audience and grow new and existing income streams over 2020.

Production of online tours and videos was the most popular activity with 41% of sites doing so. Attractions also tapped into parents' need for home schooling ideas, with 34% providing free family content.

Provision of free online content and developing or strengthening an online retail offer were both associated with a smaller fall in admissions and revenue.

Only 9% of attractions charged for any online content, with free attractions as likely to do so as charging attractions. However, 31% of sites did develop an online retail offer.

Headlines: Employment

Staffing levels were down across the board in 2020, with declines in permanent and seasonal staff as well as unpaid volunteers.

The majority of sites managed to protect their permanent and seasonal workers, with help from the furlough scheme. However, a net (% increase minus % decrease) of -21% of sites reduced their permanent staffing and -25% reduced seasonal staffing levels.

Nearly half of sites reduced their level of unpaid volunteers in 2020.

There is an expectation of restaffing in 2021, but perhaps not to 2019 levels.

A consistent 64-67% of permanent staff were placed on furlough at the height of lockdown across the different sizes of attraction. However, larger sites (with over 200,000 visits a year) were more able to reduce their use of furlough during 2020.

Free attractions placed a higher proportion of their staff on furlough compared with charging attractions and at their highest levels, free attractions had to furlough an average of 75% of their permanent staff.

The attraction categories placing the highest proportion of their staff on furlough were historic properties, farms and 'other' attractions, which all placed as much as 90% of their permanent staff on furlough.

Context

2020 Context: Weather Summary

2020 was the third warmest year since 1884, and was also one of the wettest years on record.

February had particularly heavy rainfall, and there were numerous incidences of flooding in the autumn and early winter. All summer months were also wetter than average. Western areas tended to suffer most from rain, in particular North West England.

Ten named storms affected the UK during 2020; these were spread across the year, occurring in January (1), February (3), August (2), October (3) and December (1).

A record sunny spring meant that 2020 was also sunnier than average.

There were several short hot spells during 2020 including the Easter bank holiday weekend and also during the summer. For 13 days across the summer temperatures in excess of 30°Cwere recorded somewhere in the UK, with a high of 37.8°C at Heathrow on 31st July.

Source: MET Office

2020 Context: COVID-19

Most strands of life in England – health, political, economic, leisure – were dominated by COVID-19 in 2020.

The appearance of COVID-19 was announced by the World Health Organisations (WHO) on 9th January and declared as a public health emergency on 31st January by which point 9800 cases worldwide had been identified. WHO declared COVID-19 a pandemic on 11th March 2020.

The first UK lockdown began on 23rd March with schools closed, non-essential workers home working and non-essential shops and all attractions closed. UK residents were allowed to leave their homes once a day for exercise.

Subsequent reopening was phased, with some restrictions remaining throughout 2020 and beyond and additional local and national lockdowns.

Key dates for visitor attractions:

23/3	**First national lockdown begins**
23/5	Reopening of some outdoor attractions allowed on a restricted basis
15/6	Outdoor attractions and non essential shops allowed to reopen
4/7	Lockdown easing and social distancing reduced from 2m to '1m plus mitigation' Remaining visitor attractions allowed to reopen
3/8	Eat Out to Help Out scheme starts (50% discount on meals up to £10 per person)
14/9	'Rule of six' introduced
14/10	Three tier system of restrictions introduced in England
5/11	**Second national lockdown begins**
2/12	Second national lockdown ends with return to the three tier system
19/12	Forth tier introduced preventing travel for people living in restricted areas

Local lockdowns (region):

4/7–14/10	Leicester (EM)
25/7–1/8	Luton (East)
25/7–14/10	Blackburn & Darwen (NW)
1/8–14/10	Bradford (Y&H)
5/8–14/10	Bolton, Tameside, Manchester, Bury, Oldham, Rochdale, Salford, Stockport, Trafford, Wigan, Pendle, Hyndburn, Burnley, Rossendale, Calderdale, Kirklees (NE/ NW/ Y&H)
29/8–26/9	Northampton Greencore Food to Go employees (EM)
15/9–14/10	Birmingham, Sandwell, Solihull (WM)
18/9–14/10	Durham, Gateshead, Newcastle, Northumberland, Tyneside, Sunderland (NE/ NW)

Rules varied by location and during the periods shown. Attractions were not always required to shut, but the consumer appetite for visiting is likely to have been less. On 14th October the local lockdown system was replaced with the three tier system.

Impact of COVID-19

Impact of COVID-19

Attraction Closure

Full Closure in 2020: By Attraction Category

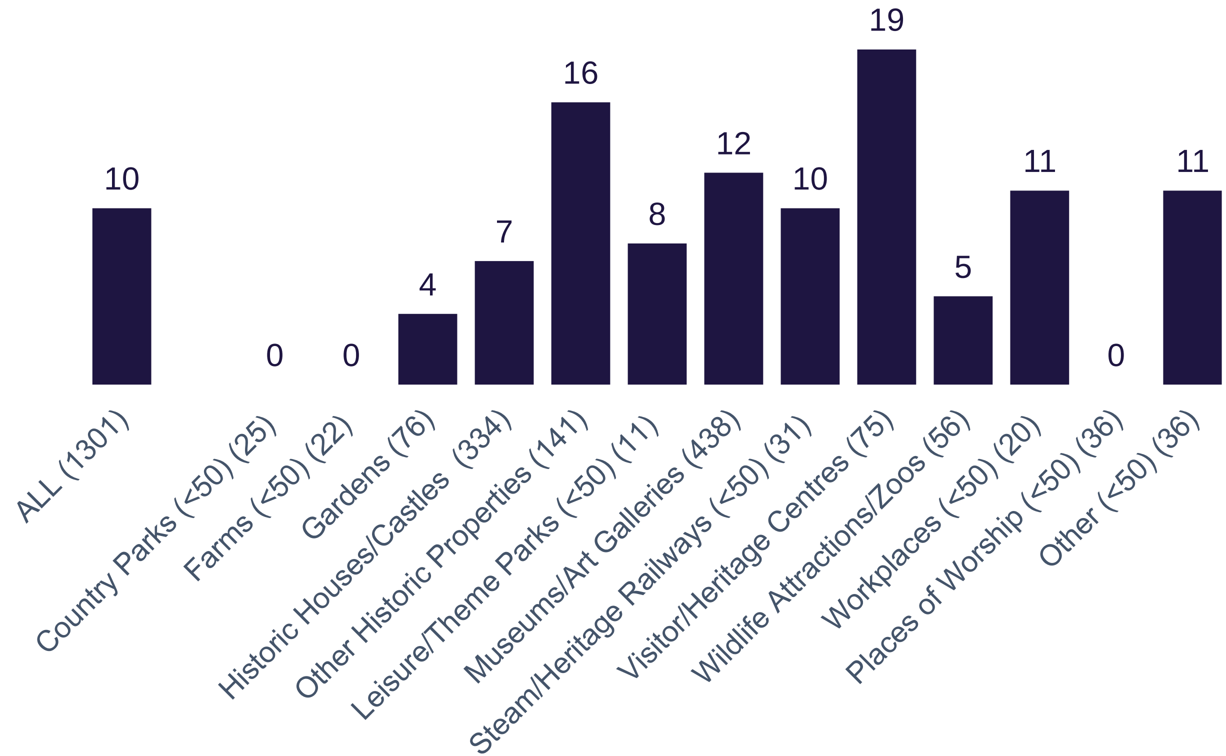
The COVID-19 pandemic had a significant impact on visitor attractions, with 1 in 10 of the sites responding to the survey telling us that they were closed or had not received any visitors throughout 2020.

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

Some attraction categories clearly fared better than others. Outdoor attractions, where the required COVID related measures were often easier to meet and which saw government restrictions lifted earlier in the year are more likely to have opened during 2020.

Indoor attractions saw more closures, in particular visitor/ heritage centres and 'other historic properties' (e.g. historic monuments, ships and windmills).

% of attractions closed throughout 2020, by category



Base: All attractions responding to the survey (1301)

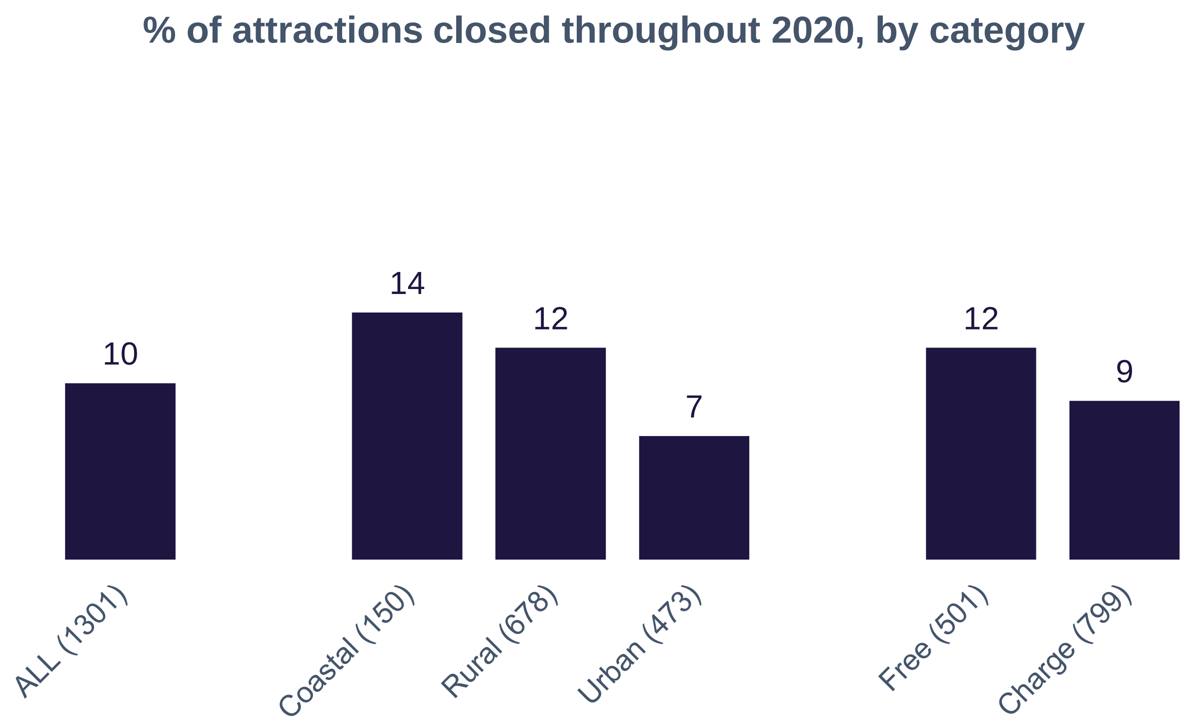
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Full Closure in 2020: By Location and Charge

Full closure of sites varies by location type, with a higher level of closures in coastal and rural areas. Site opening in these locations is more seasonal than at urban sites, and forced closure for part of the usual seasonal opening may have affected the financial viability of opening for the season.

Free sites are more likely to have remained closed during 2020 than sites that charge an entrance fee.



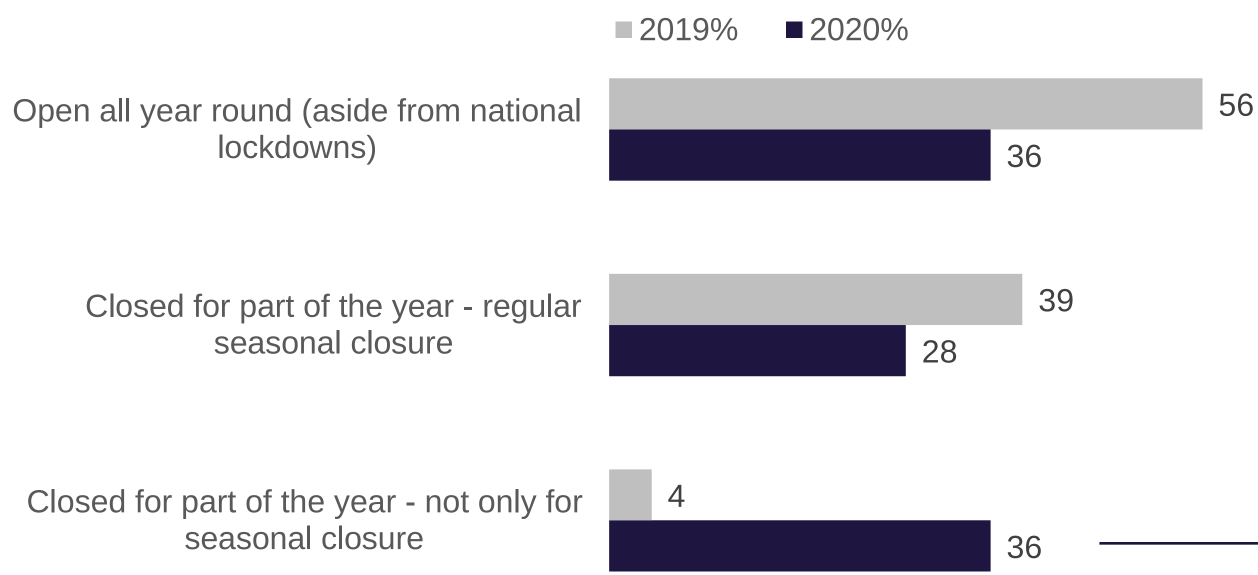
Base: All attractions responding to the survey (1301)

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

Partial Closure in 2020

Over a third of attractions were unable to open for their typical visitor seasons once national restrictions were lifted. This was predominantly driven by continued restrictions due to regional lockdowns and difficulties in meeting the requirements to open safely during the pandemic, although profitability and a lack of staff/ volunteers also came into play.

% sites closed for specific reason aside from National Lockdowns



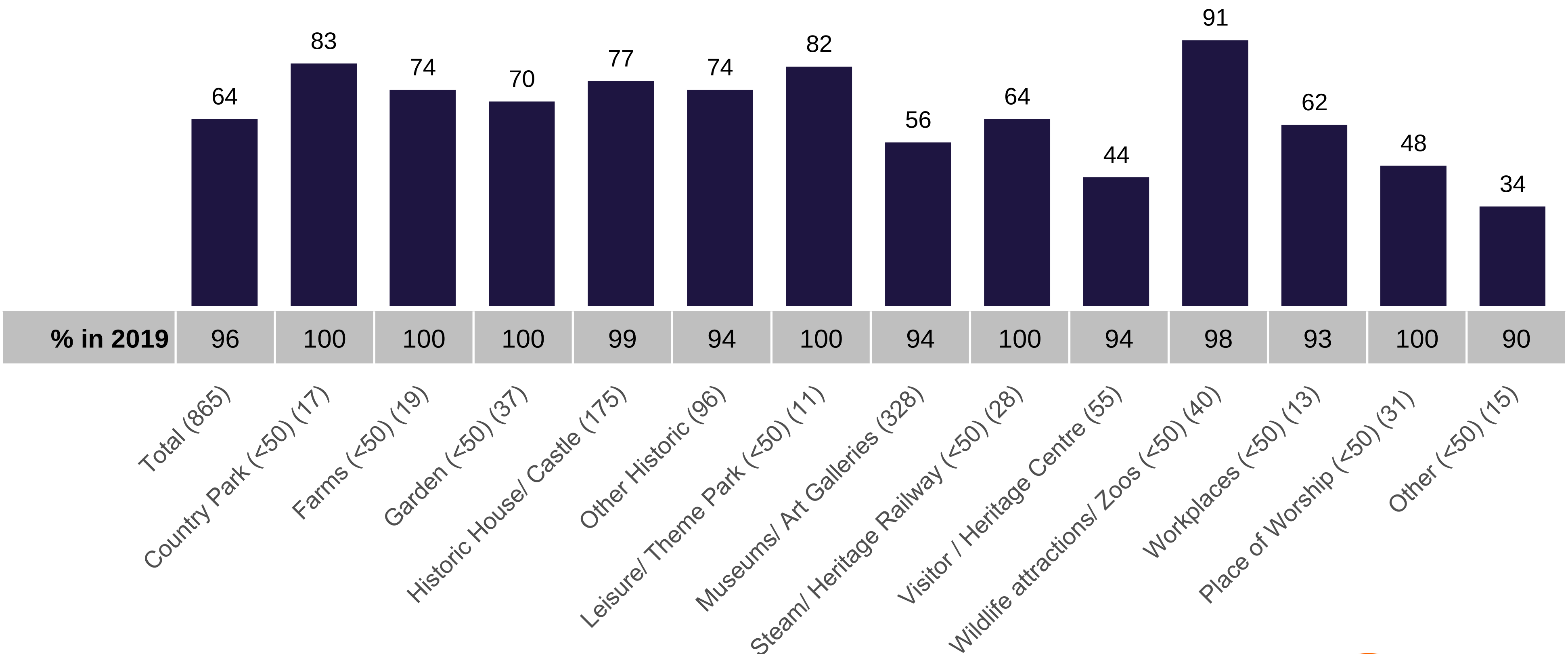
2020 closure due to…	%
Regional lockdown	29
Unable to meet COVID requirements on site	17
Not profitable to open	7
Insufficient staff/ volunteers	6
Refurbishment/ repairs	7
Other reason	6

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

Partial Closure in 2020: By Attraction Category

Wildlife attractions were the least subject to extended closure in 2020, followed by country parks and leisure/ theme parks.   The attraction categories most likely to report extended closure are visitor/ heritage centres, places of worship, museums/ galleries and 'other' attractions.

% sites open year round aside from national lockdowns and planned seasonal closure



Base: All attractions answering closures question (865)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Partial Closure in 2020: By Attraction Category

Details of partial closure by attraction category are provided in the table below.

% sites open and reasons for closure, by attraction category

2020 closure due to… (%)	Total (865)	Country Park (<50) (17)	Farms (<50) (19)	Garden (<50) (37)	Historic House/ Castle (175)	Other Historic (96)	Leisure/ Theme Park (<50) (11)	Museums/ Art Galleries (328)	Steam/ Heritage Railway (<50) (28)	Visitor / Heritage Centre (55)	Wildlife attraction / Zoos (<50) (40)	Work-places (<50) (13)	Place of Worship (<50) (31)	Other (<50) (15)
Open year round (aside from national lockdowns)	36	71	58	35	41	45	18	28	7	22	83	31	45	27
Regular seasonal closure	28	12	16	35	36	29	64	28	57	22	8	31	3	7
Regional lockdown	29	18	21	22	18	26	45	35	39	38	5	46	45	27
Unable to meet COVID requirements on site	17	6	5	0	17	23	0	18	25	25	0	38	13	13
Not profitable to open	7	0	11	11	13	7	9	5	14	7	0	0	6	7
Insufficient staff/ volunteers	6	0	0	3	6	2	0	9	4	15	0	0	6	0
Refurbishment/ repairs	7	6	5	8	6	5	0	9	7	13	0	15	0	7
Other reason	6	6	11	14	3	4	9	8	0	5	5	0	0	27

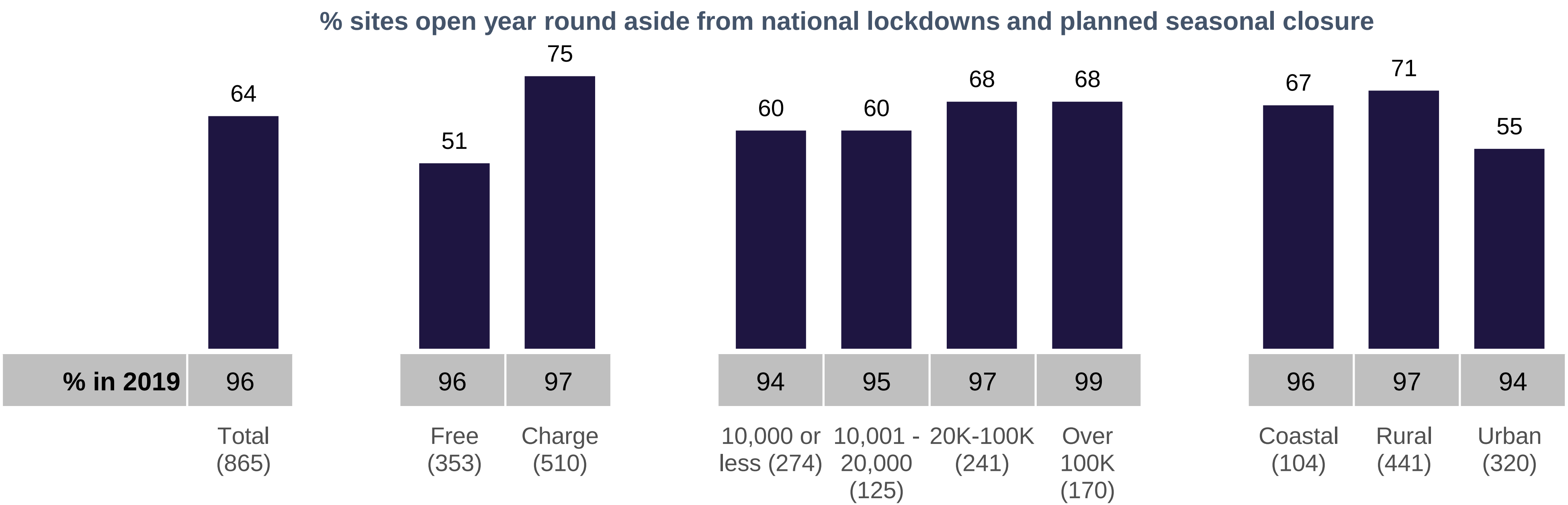
Base: All attractions answering closures question (2020: 865, 2019: 973)
Breakdown of 'other' reasons not asked in 2019.

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

Partial Closure in 2020: By Attraction Type

Free sites stayed closed for longer than charging sites in 2020. This may be due to the additional layer of work required to adhere to opening requirements (e.g. setting up ticketing systems to restrict visitor numbers). There may also be less reliance on visitors for funding than at charging attractions.

Whereas urban sites were more likely to open for at least part of 2020 than those based in coastal or rural areas, they were also more likely to be subject to regional lockdowns.



Base: All attractions answering closures question (865)

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

Partial Closure in 2020: By Attraction Type

Details of partial closure by attraction charging, size and location are provided in the table below.

% sites open and reasons for closure, by attraction type

2020 closure due to… (%)	Total (865)	Free (353)	Charge (510)	10,000 or less (274)	20K-100K (241)	10,001 - 20,000 (125)	Over 100K (170)	Coastal (104)	Rural (441)	Urban (320)
Open year round (aside from national lockdowns)	36	33	39	19	47	26	56	41	33	39
Regular seasonal closure	28	18	36	41	21	34	12	26	38	16
Regional lockdown	29	37	23	28	28	28	35	18	24	39
Unable to meet COVID requirements on site	17	22	13	32	9	12	4	16	21	11
Not profitable to open	7	6	8	7	6	4	12	4	9	7
Insufficient staff/ volunteers	6	8	5	9	6	6	2	9	6	6
Refurbishment/ repairs	7	9	6	8	5	9	5	8	6	9
Other reason	6	8	5	7	5	6	6	6	6	6

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

Attraction opening during COVID-19

Opening by month

Even before the COVID-19 pandemic hit, the proportions of attractions opening was somewhat lower than in 2019, perhaps due to the storms in the early part of the year.

Typically nearly three quarters of attractions are open in March, but this reduced to less than half in 2020, and only 5-6% were able to remain open in April to May providing public access for exercise. This rose slowly to a peak of 70% of attractions open in September, but this still remained 27% down compared with 2019 opening.

	% of sites normally open	% of sites open in 2019	% of sites open in 2020	Difference between 2019 and 2020 opening	% of sites in an area subject to national or regional (tier 3 or 4) lockdown for the majority of the month
January	54	53	50	-3	N/A
February	65	64	59	-5	N/A
March	74	74	46	-28	N/A
April	96	94	5	-89	100
May	99	98	6	-92	100
June	99	98	14	-84	100
July	99	99	39	-60	32
August	98	99	61	-38	16
September	97	97	70	-27	13
October	91	90	66	-24	20
November	63	64	14	-50	100
December	62	61	29	-32	73

Base: All attractions providing site opening data (c.780)

Shaded areas correspond to months where %s are notably higher compared to months in the rest of the year

Active capacity management

Almost three quarters of attractions needed to introduce new measures to help manage capacity during the pandemic. Capacity management is clearly a particular concern for larger sites and 87% of attractions that typically welcome over 100k visitors a year needed to introduce new measures.

A full breakdown of results by attraction classification is shown in the tables below.

% needing to introduce new measures to manage capacity during the pandemic

	%
Total Average	74
Country Parks (15)	27
Farms (16) (<50)	88
Gardens (36) (<50)	86
Historic Houses/Castles (164)	82
Other Historic Properties (79)	62
Leisure/Theme Parks (10) (<50)	90
Museums/Art Galleries (292)	73
Steam/Heritage Railways (23) (<50)	87
Visitor/Heritage Centres (47) (<50)	66
Wildlife Attractions/Zoos (35) (<50)	80
Workplaces (11) (<50)	82
Places of Worship (26) (<50)	62
Other	82

	%
Total Average	74
Coastal (84)	85
Rural (392)	71
Urban (300)	76
Free attractions (300)	63
Paid attractions (465)	78
10,000 or less (231)	60
10,001 - 20,000 (114)	73
20K-100K (229)	85
Over 100K (174)	87

Base: All attractions answering the active capacity management question (776)

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

Opening Capacity: By Attraction Category

In order to meet required health and safety standards, such as maintaining a 2 metre distance between visitors (or 1 metre with mitigation), many sites had to reduce their maximum visitor capacity. The average reduction was to 46% of 2019 maximum capacity. This changed very little, increasing only by 4 percentage points on average by the end of 2020.

Capacity was higher at outdoor attractions, in particular gardens, where the average hit 70% by the end of 2020.

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

	Opening Capacity of site following 1st national lockdown as a % of total 2019 capacity (mean)	Maximum capacity of site by end of 2020 / at point of closure for the year 2020, as a % of 2019 maximum capacity (mean)
Total Average (430)	46	49
Country Parks (<10)	(<10)	(<10)
Farms (<50) **(11)**	49	56
Gardens (<50) **(19)**	61	70
Historic Houses/Castles (112)	49	54
Other Historic Properties (47)	54	55
Leisure/Theme Parks (<10)	(<10)	(<10)
Museums/Art Galleries (139)	42	43
Steam/Heritage Railways (<50) **(17)**	47	43
Visitor/Heritage Centres (<50) **(21)**	43	45
Wildlife Attractions/Zoos (<50) **(26)**	43	51
Workplaces (<10)	(<10)	(<10)
Places of Worship (<50) **(13)**	25	30
Other (<10)	(<10)	(<10)

Base: All attractions who needed to actively manage their capacity and answered the opening capacity question (545) and maximum capacity question (536)

(<50) Base size below 50 (please treat with caution)
(<10) Base size below 10, figure not reported

Opening Capacity: By Location, Charge & Size

Large attractions that typically attract more than 100k visitors had the lowest opening capacity at just 36% of the 2019 maximum, but increased this to 47% by the end of 2020.

At the point of opening capacity was highest in rural locations. However, both coastal and urban sites increased capacity over the year and ended 2020 with a similar visitor capacity to rural sites.

Capacity for charging attractions was only 6% greater than free sites when they first reopened after lockdown, but this divide grew over the course of the year, as charging attractions increased capacity up to 52% of 2019 levels, while the capacity limits at free attractions remained unchanged.

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

	Opening Capacity of site following 1st national lockdown as a % of total 2019 capacity (mean)	Maximum capacity of site by end of 2020 / at point of closure for the year 2020, as a % of 2019 maximum capacity (mean)
Total Average (430)	46	49
Coastal (53)	46	52
Rural (224)	50	54
Urban (153)	41	54
Free attractions (110)	42	42
Paid attractions (319)	48	52
10,000 or less (196)	50	49
10,001 - 20,000 (61)	50	53
20K-100K (107)	42	48
Over 100K (58)	36	47

Base: All attractions who needed to actively manage their capacity and answered the opening capacity question (545) and maximum capacity question (536)

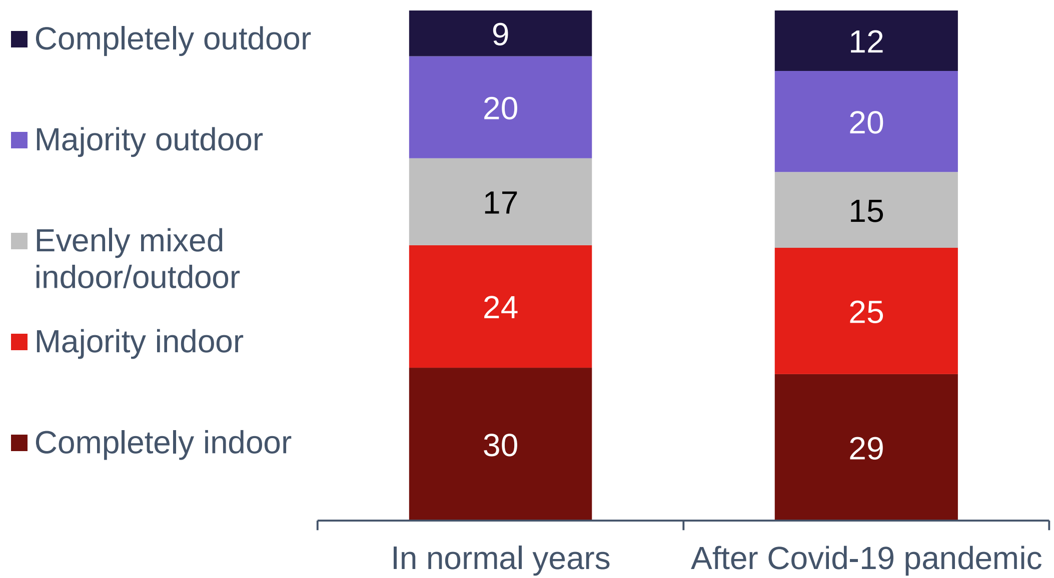
(<50) Base size below 50 (please treat with caution)

Shifts in Venue Type

Before the COVID-19 pandemic 29% of attractions classified themselves as primarily 'outdoor' sites, with 54% being mostly indoor and 17% a fairly even mix of the two.

A small proportion of sites responded to the pandemic by moving more of their offer outside increasing the 'outdoors' focused attraction category by 3%.

% of attractions that are indoor, outdoor or a mix



Base: All attractions answering type of attraction question (791)

Introduction of Booking Systems

A potential silver lining of the COVID-19 pandemic is that it has sped up the adoption of technology within the attractions sector.

While only 25% of sites had an online booking system before the pandemic, this more than doubled to 57% by the end of 2020.

At an overall level there is a fairly even split between attractions that have full embraced prebooking, with stringent enforcement and an intention to continue to require pre-booking once restrictions are lifted, and those who prefer a more flexible approach. However, free sites are more likely to permit walk up admissions than charging sites.

% of sites with an online booking system

%	All	Free (303)	Paid (456)
Yes – introduced in 2020	32	20	39
Yes – introduced before 2020	25	16	32
No online booking system	43	64	29

% of sites requiring visitors to pre-book visits during 2020

%	All	Free (284)	Paid (442)
Yes – visitors were only allowed in if they pre-booked tickets	27	7	40
Yes – but some walk ups were permitted where capacity allowed	28	26	29
No pre booking required	45	67	31

% intending to continue to require pre-booking once restrictions are lifted

%	All	Free (87)	Paid (316)
Yes	49	44	50
No	51	56	50

Base: All attractions answering online booking question (759) / Pre-booking question (736)
Base: All attractions with an online booking system who answered the pre-booking continuation question (403)

Measures introduced due to COVID-19

86% of attractions responding to the survey put at least one measure in place to reduce the risk of COVID-19 transmission, and on average five different measures were introduced.

The most common measures were provision of hand sanitizers, enhanced cleaning regimes, enforced social distancing and contactless check-in and payments, all of which were employed by two thirds of sites or more.

Measures put in place as a result of Covid-19 pandemic to enable sites to continue to engage with audiences in 2020 (%)

Base: All attractions answering further measures question (747)

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

Measures introduced due to COVID-19: By attraction charging and size

Small attractions that typically welcome less than 10,000 visitors a year are significantly less likely to have made changes to their setup specifically to address COVID-19, but their prioritisation of measures follows the same pattern as for larger sites. Charging attractions are more likely to have put additional measures in place than free attractions.

Measures put in place as a result of Covid-19 pandemic to enable sites to continue to engage with audiences in 2020

%	Free	Paid	10k or less	10k-20k	20k-100k	Over 100k
Hand sanitizers	71	89	65	84	93	91
Enhanced cleaning regimes	67	88	61	84	92	90
Enforced social distancing	67	84	59	82	90	84
Contactless check-in and payments	50	76	41	69	81	80
Obtained the 'We're Good To Go' industry standard	46	74	38	65	74	85
Closure of communal areas	38	63	27	52	68	71
Certification for complying with official hygiene and distancing guidelines	28	57	28	50	58	51
Daily staff health checks	18	20	9	20	23	28
Daily guest health checks	9	8	6	13	9	7
None of these	25	7	29	12	5	2

Base: All attractions answering further measures question (747)

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

Visitor Admission Trends

Overall Visitor Admission Trends

Overall, attractions in England reported a -65% annual decrease in total visits from 2019 to 2020, driven by the COVID-19 pandemic. This decline was driven by site closure associated with lockdown and opening restrictions and a significant contraction of international and domestic tourism and the domestic days out market.

VisitBritain inbound visitor statistics (based on the International Passenger Survey until 16th March and then statistical modelling of administrative sources) estimate a -73% decline in international visits when compared with 2019 and a -78% decline in spending.

VisitEngland's COVID-19 consumer sentiment tracker found that consumer confidence in 2020 was much lower compared with the year before, resulting in an expectation of fewer domestic trips and visits to attractions, in particular indoor/ covered attractions.

Base: All attractions providing visits data for current and previous year (984)

* % change is under 1%, therefore not shown

Visitor Admission Trends 2020: By Attraction Category

All attraction categories showed a decline in admissions in 2020.

This was most marked for museums/ galleries (down by -76%), other historic properties (down by -74%), places of worship (down by -73%) and ‘other’ attractions (down by -82%).

Country parks fared best, with the decrease in admissions averaging at only -7%. This was followed by gardens, wildlife attractions and leisure/theme parks with declines of -40%, -41% and -44% respectively.

Visitor admission trends: By Attraction Category

	2019/20 change (%)	2018/19 change (%)
Total Average	-65	+3
Country Parks (21) <50	-7	+3
Farms (19) <50	-50	+8
Gardens (61)	-40	+10
Historic Houses/Castles (274)	-57	+5
Other Historic Properties (88)	-74	+3
Leisure/Theme Parks (9) <10	(<10)	*
Museums/Art Galleries (338)	-76	*
Steam/Heritage Railways (26) <50	-55	+3
Visitor/Heritage Centre (45) <50	-66	+1
Wildlife Attractions/Zoos (43) <50	-41	+5
Workplaces (13) <50	-56	+2
Places of Worship (31) <50	-73	+7
Other (16) <50	-82	*

Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

<50 Base size below 50 (please treat with caution)
* % change is under 1%, therefore not shown

Index of Visits to Attractions: Calculation

The charts presented on slides 42 and 43 show the **indexed visits trend** for each attraction category. The **base year for the index is 1989, with the index set at 100 for that year**. Annual percentage changes in visits are subsequently applied to this index e.g. visits to museums / art galleries increased +4% between 1989 and 1990, increasing the index for 1990 to 104.

Because the number of attractions responding each year differs, the percentage change between any two years is applied each time to the previous year's index to take account of varying sample sizes each year.

Operators are asked in each survey year to provide the number of visits for both the survey year and previous year. This enables the trend between any two years to be calculated based on the same attractions.

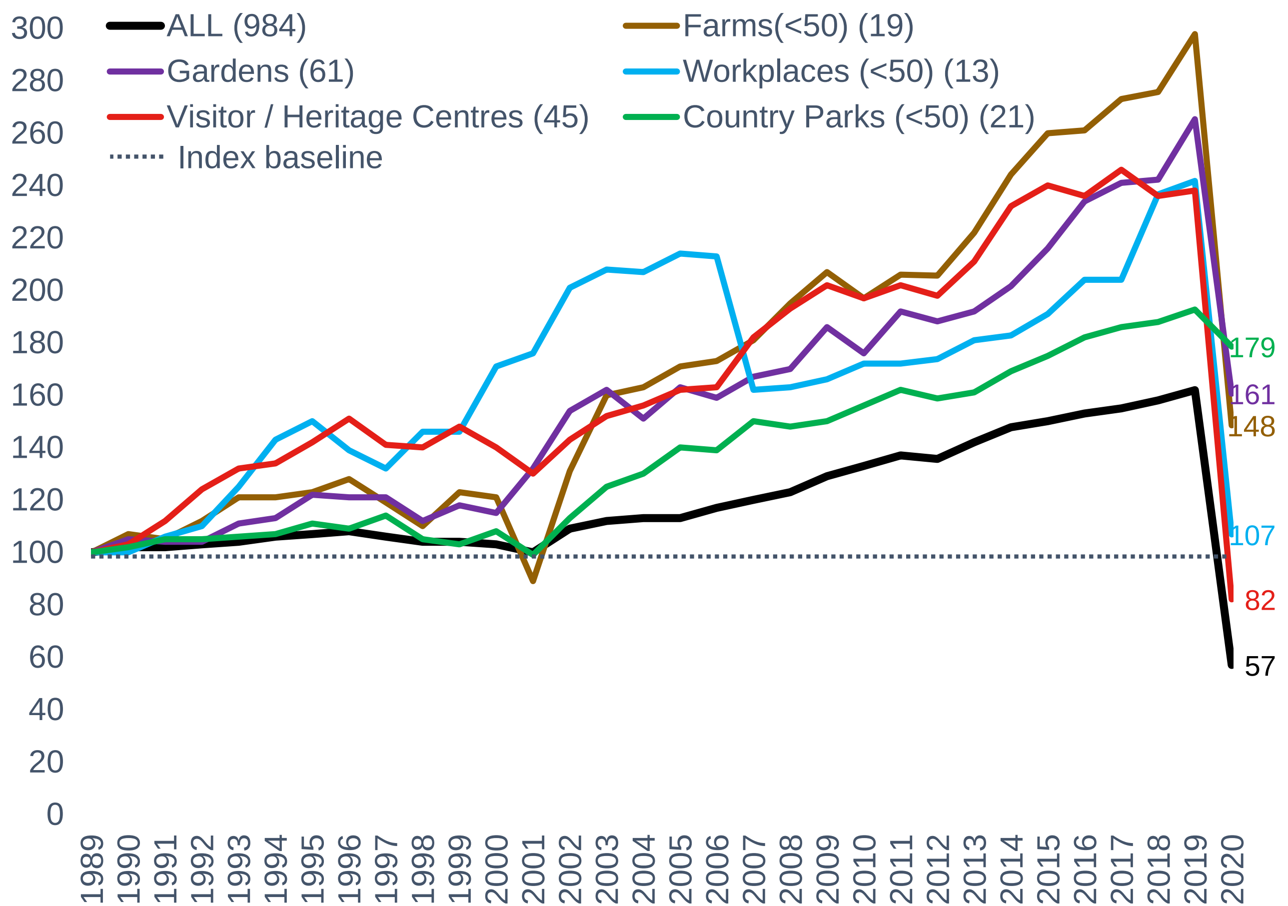
Index of Visits to Attractions: Sectors Outperforming vs. Market

This chart illustrates the attraction categories which have shown above average annual visit increases since 1989. **Across England, attractions as a whole ('all'), visits increased by 62% in the thirty years to 2019 (index of 162). In 2020 they dropped to an index of 57, substantially below the 1989 baseline.**

The relatively small fall in visitor admissions to country parks see this category remain 79% above the index, rising to the best performing attraction category for volume growth against the 1989 index.

Gardens, farms, and workplaces all received visitor volumes exceeding those recorded in 1989 (with indexes of 161, 148 and 107 respectively) despite substantial declines in visitor volume.

However, visitor/ heritage centres, which had seen limited growth since 2015, saw visitor volume fall below 1989 levels with an index of 82.



Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

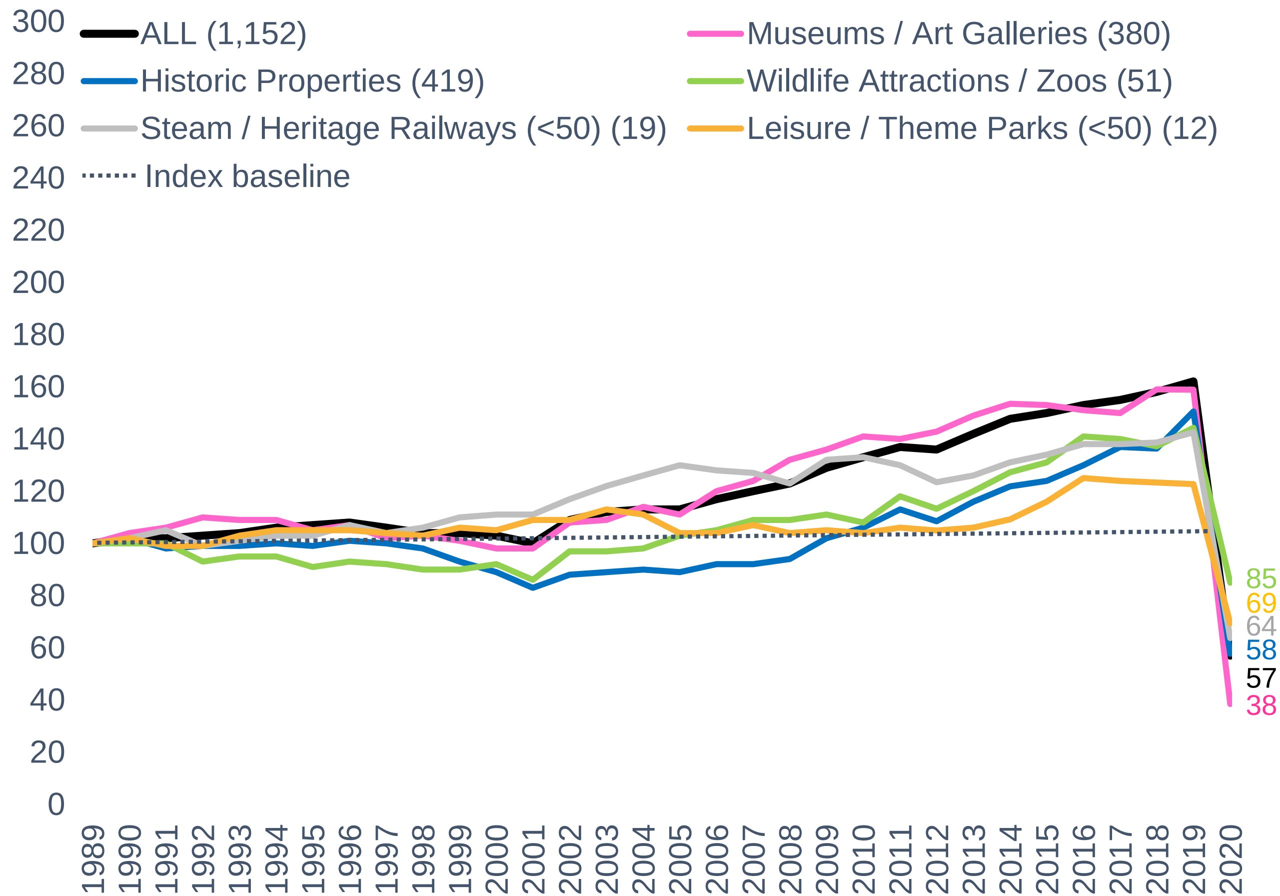
(<50) Base size below 50 (greyed out – please treat with caution)

Index of Visits to Attractions: Sectors Underperforming vs. Market

This chart illustrates the attraction categories which showed below average annual visit increases between 1989 and 2019**. Across England, attractions as a whole ('all'), visits increased by 62% in the thirty years to 2019 (index of 162). In 2020 they dropped to an index of 57, substantially below the 1989 baseline.**

Museums & galleries saw a big decline in admissions in 2020 which reduced visitor volume to just 38% of what it was in 1989, making it the worst performing category for volume growth in our time series.

The volume growth trend for historical properties is in line with the sector average, while lower declines in volume at wildlife attractions, leisure/ theme parks and steam/ heritage railways saw these categories perform better than the sector average in 2020.



Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

(<50) Base size below 50 (greyed out – please treat with caution)

Visitor Admission Trends 2020: By Region

Regional trends in visitor numbers varied significantly in 2020, from -40 in the East to -77 in London.

With greater reliance on international tourism than other areas, London was hit hardest by the COVID-19 pandemic. This was compounded by a lack of consumer confidence in using public transport to access the city, with Transport for London data showing journeys down by 59% for bus, 68% for overground and 78% for underground in the capital*.

North East (decline of -68%) and North West (decline of -62%) also suffered a large decrease in visitor volume, associated with local lockdowns in these regions.

As we might expect indoor attractions report a larger decline in admissions (-76%) than outdoor attractions (-43%). This will in part be due to lockdown restrictions delaying the opening of indoor attractions beyond the point when outdoor attractions were allowed to open, and in part due to consumers feeling less comfortable in visiting indoor attractions during the pandemic**.

Visitor Admission Trends 2020: By Region

	2019/20 change (%)	2018/19 change (%)
Total Average	-65	+3
North West (113)	-62	-5
North East (63)	-68	+4
Yorks/Humber (91)	-54	-2
East Midlands (87)	-50	+7
West Midlands (87)	-53	+1
East (122)	-40	+6
London (80)	-77	+3
South East (184)	-58	+4
South West (157)	-60	+4
Mostly Indoors (341)	-76	N/A
Evenly Mixed (98)	-65	N/A
Mostly Outdoors (221)	-43	N/A

Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* Based on Transport for London's public transport journeys data.
**Based on BVA BDRC's 'Clearsight on Recovery' COVID sentiment tracker.

Visitor Admission Trends 2020: By Admission Charge, Geographic Location & Size

Location type was the biggest differentiator in performance in 2020. Rural sites fared best during the COVID-19 pandemic, with visit volume dropping by -47%. In contrast sites in urban locations saw an average decline of -74% in their admissions, while coastal regions fell in between with a decline of -59%.

Sites charging an entrance fee reported a -60% fall in visitor volume in 2020, compared with a -71% fall for free attractions.

These differences in performance are related to free sites and those in urban locations having a more compressed opening period compared with their typical practices.

The difference in performance by site size was less marked, although medium large sites performed best, with the decline in admissions of -58% compared with the sector average of -65%.

Visitor Admission Trends 2020: By Admission Charge, Geographic Location & Size

	2019/20 change (%)	2018/19 change (%)
Total Average	-65	+3
Free (320)	-71	*
Paid (657)	-60	+5
Coastal (107)	-59	+3
Rural (494)	-47	+4
Urban (383)	-74	+2
20,000 visits or less (357)	-68	*
20,001 – 50,000 visits (195)	-66	+2
50,001 – 200,000 visits (233)	-58	+3
Over 200,000 visits (199)	-66	+3

Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* %change is under 1%, therefore not shown

Visitor Admission Trends 2020: Paid & Free Attractions

Free country parks saw less than a 1% change in admissions from 2019 to 2020 All other categories saw a decline of between -39% (for gardens charging an admission fee) to -82% (for ‘other’ charging attractions, such as caves, piers and stadium tours).

Visitor Admission Trends 2020: Free Attractions

Free Attractions	2019/20 change (%)	2018/19 change (%)
ALL FREE (320)	-71	*
Country Parks (16) $^{<50}$	*	+2
Farms $^{<10}$	(<10)	(<10)
Gardens $^{<10}$	(<10)	(<10)
Historic Houses/Castles (14) $^{<50}$	-78	-8
Other Historic Properties (16) $^{<50}$	-44	+4
Leisure/Theme Parks $^{<10}$	(<10)	(<10)
Museum/Art Galleries (197)	-76	+1
Steam/Heritage Railways $^{<10}$	(<10)	(<10)
Visitor/Heritage Centres (26) $^{<50}$	-55	+1
Wildlife Attractions/Zoos $^{<10}$	(<10)	(<10)
Workplaces $^{<10}$	(<10)	(<10)
Places of Worship (26) $^{<50}$	-62	+3
Other $^{(<10)}$	(<10)	-1

Visitor Admission Trends 2020: Paid Attractions

Paid Attractions	2019/20 change (%)	2018/19 change (%)
ALL PAID (657)	-60	+5
Country Parks $^{<10}$	(<10)	(<10)
Farms (13) $^{<50}$	-49	+8
Gardens (56)	-39	+10
Historic Houses/Castles (258)	-55	+6
Other Historic Properties (70)	-74	+3
Leisure/Theme Parks $^{<10}$	(<10)	-1
Museum/Art Galleries (140)	-76	-6
Steam/Heritage Railways (24) $^{<50}$	-54	+5
Visitor/Heritage Centres (19) $^{<50}$	-72	+1
Wildlife Attractions/Zoos (37) $^{<50}$	-44	+5
Workplaces $^{<10}$	(<10)	(<10)
Places of Worship $^{<10}$	(<10)	(<10)
Other (13) $^{<50}$	-82	+2

Base: All attractions providing visits data for current and previous year Paid (657) Free (320)
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 (greyed out – please treat with caution)
$^{<10}$ Base size less than 10 (figure therefore omitted)

Visitor Admission Trends 2020: Other Regional Dimensions

The chart below shows the changes by region split by free and paid attractions, and area type.

Visitor Admission Trends 2020: Other Regional Dimensions

2019/20 change %	Free	Paid	Coastal	Rural	Urban
Total Average	-71	-60	-59	-47	-74
North West (113)	-71	-53	(<10)	-52 <50	-67
North East (63)	-79 <50	-59 <50	-76 <50	-51 <50	-81 <50
Yorks / Humber (91)	-56 <50	-51	(<10)	-35 <50	-72 <50
East Midlands (87)	-55 <50	-48	(<10)	-43	-77 <50
West Midlands (87)	-66 <50	-46	N/A	-41 <50	-65 <50
East (122)	-34 <50	-43	-51	-39 <50	-37 <50
London (80)	-76 <50	-79 <50	N/A	(<10)	-77
South East (184)	-75	-54	-61 <50	-49	-70
South West (157)	-73 <50	-59	-62 <50	-56	-69 <50

Base: All attractions providing visits data for current and previous year (984)
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 2020: Child Visits Summary

The volume of children visiting attractions decreased by -61% from 2019 to 2020, a slightly smaller decline than for overall admissions. This helped sites for which children comprise a major part of their audience (over 30%).

However, the drop in school visits was significantly larger with a volume reduction of -84% down compared with 2019.

As a result, in 2020 only 4% of admissions were made by schoolchildren, compared with 6% in 2019.

Change in child admissions by category

	2019/20 change (%)	2018/19 change (%)
Total Average (984)	-65	+3
30% or less children (497)	-67	+2
Over 30% children (160)	-58	-1

Change in volume of child admissions

	2019/20 change (%)	2018/19 change (%)
Total Average (984)	-65	+3
Child admissions (417)	-61	+4
Schoolchildren admissions (459)	-84	-5

Base: All answering child questions and providing visits data for current and previous year
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 2020: By Visitor Origin

VisitBritain's inbound visitor statistics* estimate a -73% decline in international visits when compared with 2019 and a -78% decline in spending. The change in overseas visits to attractions dropped even more than this, with a fall of -93%.

In contrast local/ day visits only fell by half and 29% of attractions actually managed to increase admissions from their day trip catchment.

% change in visits 2020

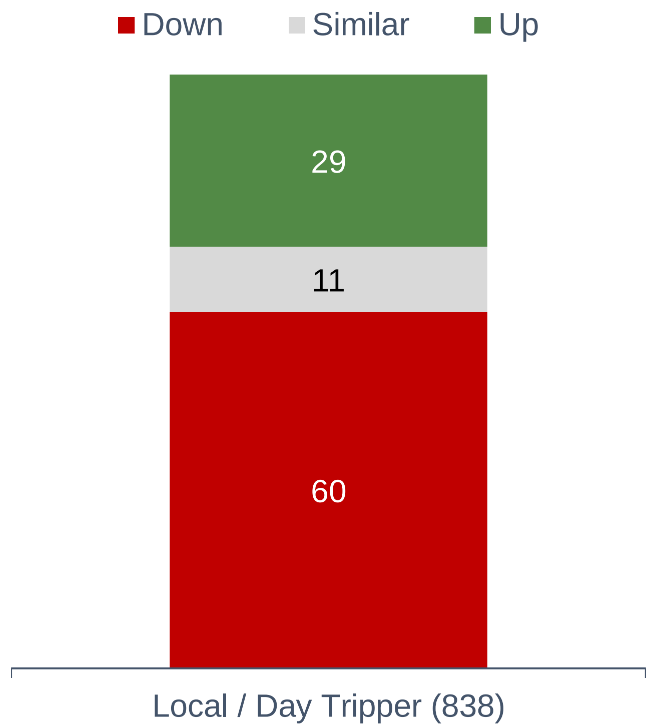
-93%
in visits

Overseas (357)

-50%
in visits

Local / Day (352)

Perceptions of visitor volume (%)



Base: All answering overseas/ local visitor questions and providing visits data for current and previous year
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.
*VisitBritain inbound visitor statistics (based on the International Passenger Survey until 16th March and then statistical modelling from administrative sources)

Visitor Admission Trends 2020: Overseas Visitors by Region, Admission Charge & Size

The fall in overseas visitors showed a consistent -93% decline across free and charging sites and we also see a similar decrease across different sizes of attraction.

The decline exceeded -90% across all regions, with the exception of the East of England where overseas visit volume fell by -79%.

	2019/20 % change in volume of overseas visitors
Total average (357)	-93
East Midlands (41) (<50)	-95
East of England (52)	-79
London (18) (<50)	-91
North East (13) (<50)	-90
North West (47) (<50)	-98
South East (71)	-92
South West (45) (<50)	-96
West Midlands (29) (<50)	-95
Yorkshire (41) (<50)	-92
Free (151)	-93
Charge (206)	-93
Up to 20k (167)	-91
20k-50k (63)	-89
50k-200k (64)	-91
Over 200k (63)	-93

Base: All attractions providing overseas visits data for current and previous year (357)
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 2020: Local / Day Trip Visitors by Region

Whereas overseas visits fell across the board, there was more of a divide when it comes to day trips.

29% of all attractions saw an increase in day trips, and this rose to 50% in the North East, where more attractions grew their day trip audience than saw a decline (38%).

Attractions based in the South East and North West were the least likely to report an increase in day trippers (only 20% and 21% respectively).

2019/20 % change in volume of day trip visitors

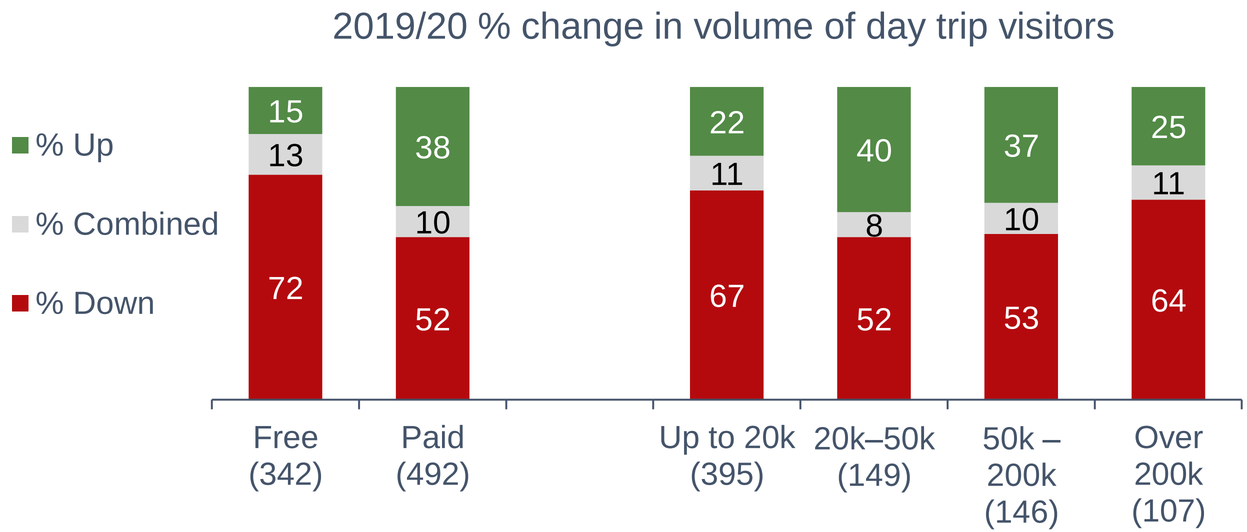
Base: All answering local visitor question (838)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* % change is under 1%, therefore not shown
(<50) Base size below 50 (please treat with caution)

Visitor Admission Trends 2020: Local / Day Trip Visitors by Admission Charge & Size

Nearly half of charging attractions (48%) were able to grow or maintain their day trip audience in 2020; this compares with just 28% of free attractions.

Medium sized attractions with between 20,000 and 200,000 visitors are the most likely to have increased or maintained their day trippers (48% having done so compared with a third of smaller attractions and 36% of larger attractions.



Base: All answering local visitor question (838)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Visitor Admission Trends 2020: Family Group Visitors by Attraction Category

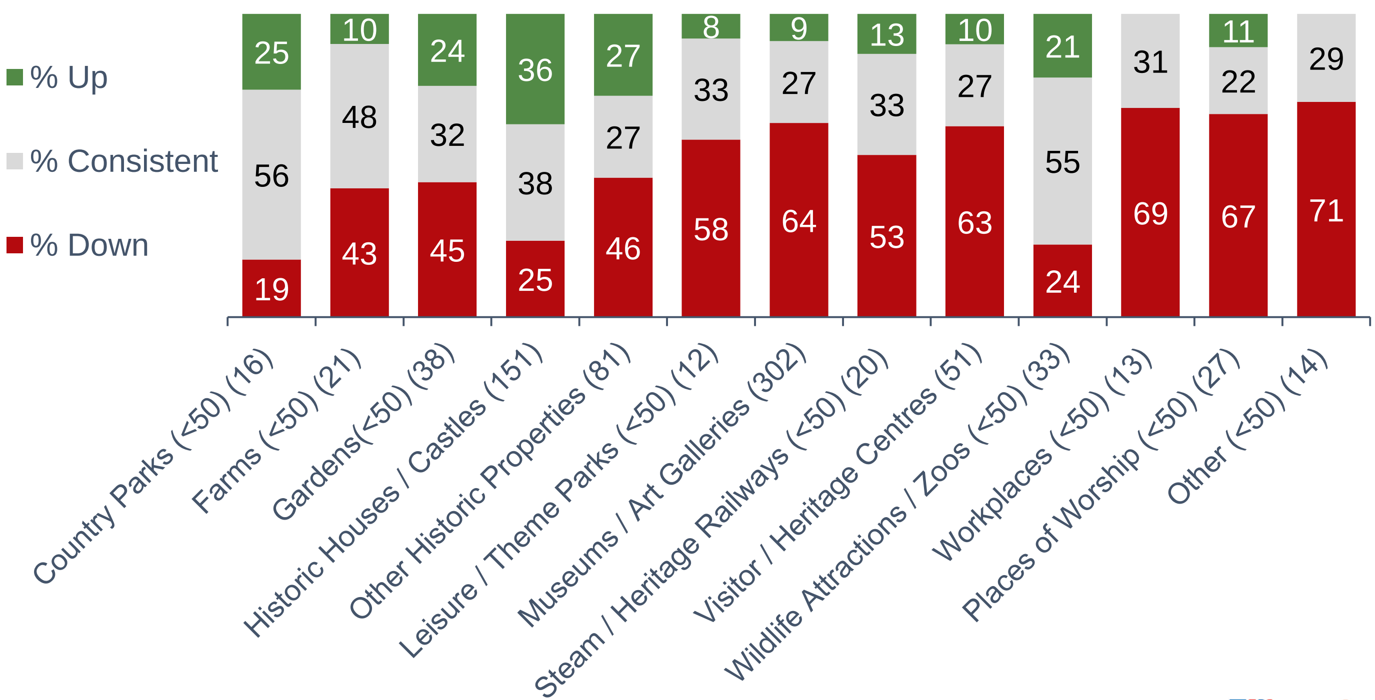
Attractions naturally fall into three tiers of family engagement and the balance of family and adult only visitors has remained consistent across these since 2019:

- High: Leisure/ theme parks (76%) and Farms (82%)
- Moderate: Country Parks (57%), Steam/ Heritage railways (66%) and Wildlife attractions (49%)
- Low: All other types, with penetration of family groups falling at 30% or below for most (with the exception of the varied Visitor/ Heritage Centres at 31%)

While the family audience contracted across most attraction types, historic houses/ castles and country parks were both more likely to see this audience grow than contract in 2020.

% visiting in a family group (mean share)	57 (<50)	82 (<50)	25 (<50)	29	29 (<50)	76 (<50)	29	66 (<50)	31 (<50)	49 (<50)	18 (<50)	17 (<50)	30 (<50)

2019/20 % change in the volume of family visitors



Base: All answering family group question (632)
Base: All stating the proportion of visits by families (789)
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 2020: Family Group Visitors by Region

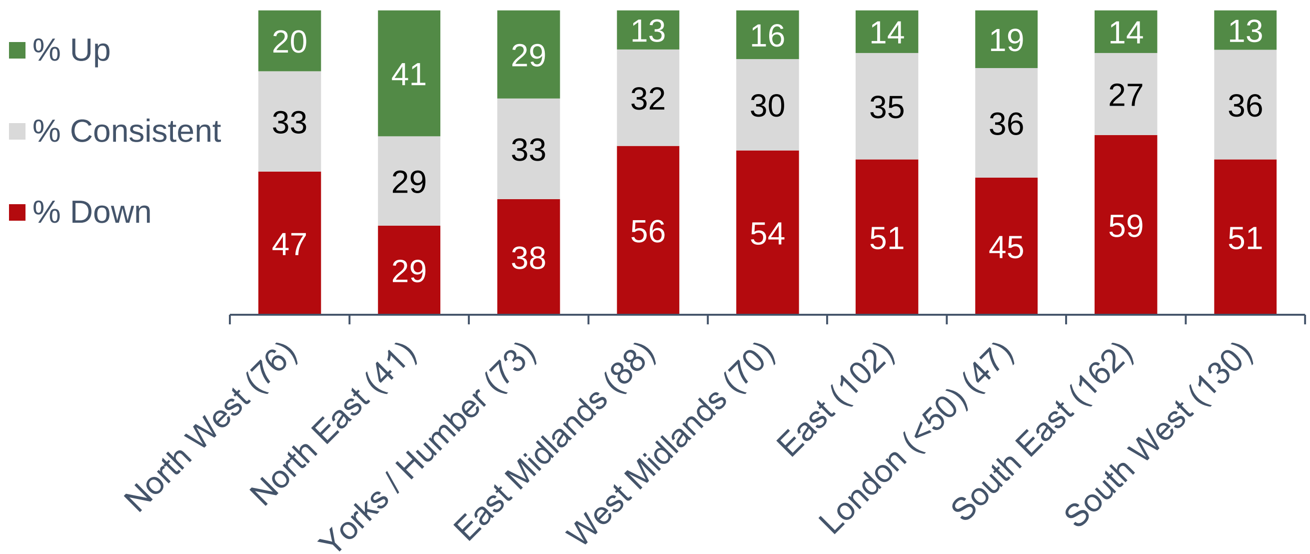
In 2020 the proportion of family visits ranged between 30% to 41% across most regions.

The exceptions were the North East and London, where 21% and 25% of visitors respectively were part of a family group.

More attractions reported a decline in family visits than an increase across all regions except the North East where 41% of attractions managed to grow this audience and only 29% reported a decline. This is consistent with the relatively strong performance amongst the day trip catchment in the region.

% visiting in a family group (mean share)	30	21	40	41	35	35	25 (<50)	37	35

2019/20 % change in the volume of family visitors



Base: All answering family group question (632)
Base: All stating the proportion of visits by families (789)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

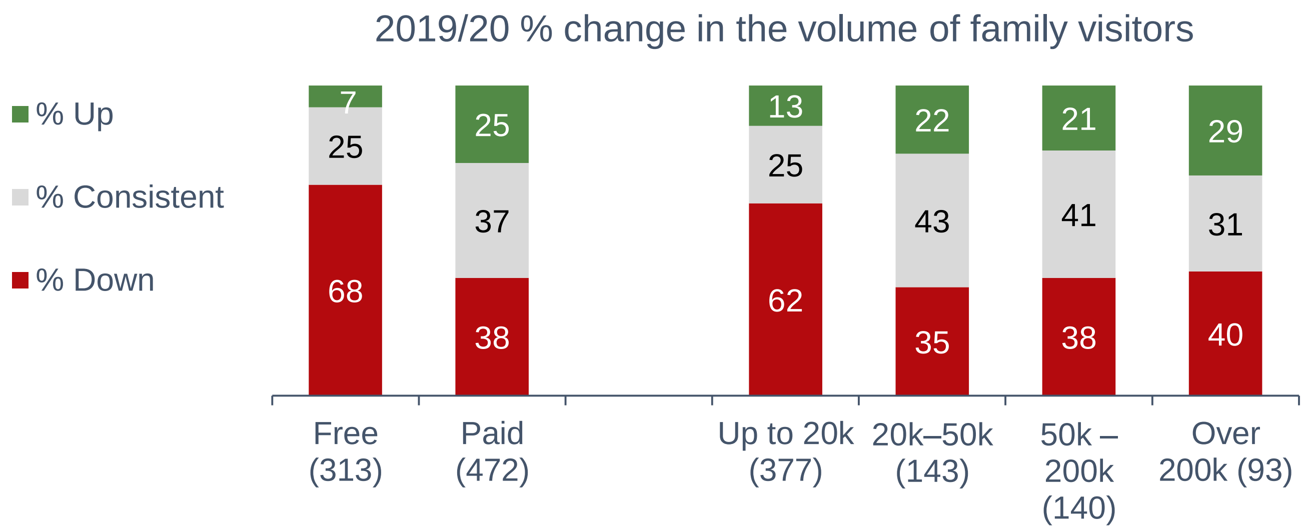
(<50) Base size below 50 (please treat with caution)

Visitor Admission Trends 2020: Family Group Visitors by Admission Charge & Size

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

While previously free and charging sites were fairly consistent in attracting the family audience, 2020 saw a higher proportion of families at charging sites, perhaps associated with better resources available for creating targeted family activities.

% visiting in a family group (mean share)	30	38	27	39	45	41



Admission Charge & Revenue Trends

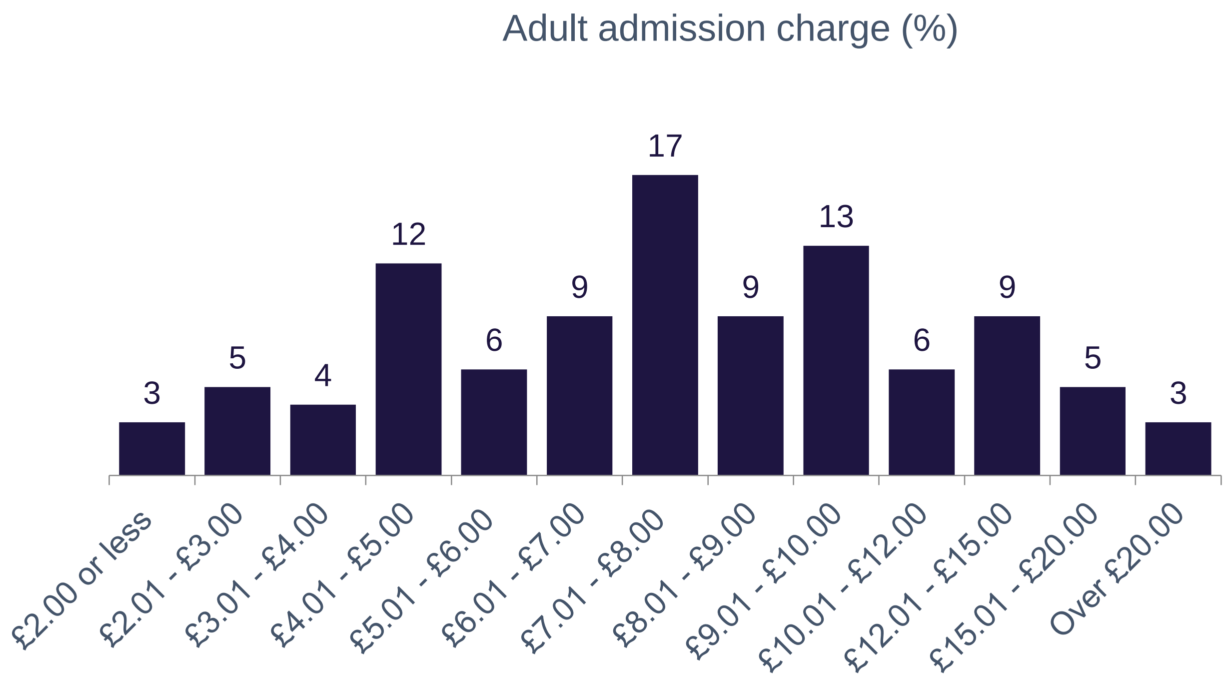
Adult Admission Charges 2020

Adult (high season) admission prices decreased in 2020 following several years of inflation, with the average price now at £8.84.

This is driven by a reduction in prices at the top end of the scale, with only 23% of attractions charging £10 or more – an 8% drop on 2019 (2019: 31%, 2018: 29%, 2017: 29%, 2016: 27%, 2015: 21%, 2014: 16%). This is likely to be a temporary decrease associated with a reduced offer due to COVID-19 restrictions.

The proportion of attractions charging £5 or less for adult entry remained level at 24% from 2018-2020, following a decline before this (2017: 29%, 2016: 32%, 2015: 35%, 2014: 39%, 2013: 41%).

In 2020 the average child entry price was £5.41 consistent with 2018-2019.



Base: All answering admission charge question (712)

Adult Admission Charge Trends 2020: By Attraction Category

At an overall level adult admission fees reduced by -6% in 2020, bucking the trend of recent years where we saw annual increases of +4-6%.

This decline was driven by the historic houses/castles category (where there was a -13% reduction in adult entrance price) and gardens (with a -11% reduction in adult entrance price) and is associated with the closure of certain parts of the site, such as historic houses and glasshouses.

The proportion of paid attractions that charged for child entry remained in line with previous years at 89%. However, child admission fees reduced in 2020, by an average of -5%.

The change in adult admission charges and average entrance prices are shown by attraction category to the right, but should be treated with caution where there are low base sizes.

% change in adult admission charge

	Average 2020 charge	2019/20 change (%)	2018/19 change (%)
ALL PAID ATTRACTIONS (712)	£8.84	-6	+5
Country Parks <10	(<10)	(<10)	(<10)
Farms (14) <50	£10.73	(<10)	+6
Gardens (61)	£7.85	-11	+4
Historic Houses/Castles (277)	£9.14	-13	+6
Other Historic Properties (87)	£8.43	+1	+7
Leisure/Theme Parks <10	(<10)	(<10)	(<10)
Museum/Art Galleries (148)	£6.20	+2	+3
Steam/Heritage Railways (27) <50	£9.21	+6	*
Visitor/Heritage Centres (21) <50	£8.69	-3	+12
Wildlife Attractions/Zoos (37) <50	£12.93	+9	+1
Workplaces (10) (<50)	£12.52	(<10)	(<10)
Places of Worship <10	(<10)	(<10)	(<10)
Other (10) <50	£10.89	(<10)	+14

Base: All answering admission charge question in 2020 (712)
Base: All answering admission charge question in 2019 and 2020 (479)
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)
* %change is under 1%, therefore not shown

Adult Admission Charge Trends 2020: By Region

Adult entrance charges fell across most regions except the North East and Yorkshire where there were modest increases of +3% and +1% respectively.

The largest average reduction was seen in the West Midlands where prices fell by -14%.

Average entrance fees in 2020 ranged from £7.99 in Yorkshire & Humberside to £13.19 in London with most prices falling at £8-9.

% change in adult admission charge

	Average 2020 charge	2019/20 change (%)	2018/19 change (%)
North West (62)	£8.37	-8 (<50)	+5
North East (42) <50	£8.09	+3 (<50)	+4
Yorks / Humber (60)	£7.99	+1 (<50)	+4
East Midlands (62)	£8.54	-9 (<50)	+5
West Midlands (70)	£8.25	-14 (<50)	+4
East (90)	£9.03	-3	+5
London (42) <50	£13.19	-2 (<50)	+8
South East (141)	£9.02	-9	+6
South West (143)	£8.45	-8	+5

Base: All answering admission charge question in 2020 (712)
Base: All answering admission charge question in 2019 and 2020 (479)
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 2020: By Attraction Size

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

Sites with 20,000 visitors or less per year charge £6.91 on average, whilst the mean score for sites with over 200,000 visitors was £13.64.

However, whereas inflation in 2019 was a consistent +5% across all the different size categories, there was substantial variation by attraction size in 2020. Attractions with fewer than 50,000 visitors a year increased adult prices by +4% (in line with previous years), but larger attractions chose to reduce entrance fees (50k-100k: -9%, 100k-200k: -16%, Over 200k: -13%). This is most likely driven by a reduced offer, with areas of the site shut or removed to meet COVID-19 safety requirements.

% change in adult admission charge

	Average 2020 charge	2019/20 change (%)	2018/19 change (%)
20,000 or less p.a. (259)	£6.91	+4	+5
20,001 – 50,000 p.a. (140)	£8.18	+4	+5
50,001 – 100,000 p.a. (82)	£8.55	-9	+5
100,001 – 200,000 p.a. (76)	£10.65	-16	+5
Over 200,000 p.a. (111)	£13.64	-13	+5

Base: All answering admission charge question in 2020 (712)
Base: All answering admission charge question in 2019 and 2020 (479)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Adult Admission Charge Trends 2020: By Geographic Location

Charging coastal attractions were the least likely to reduce their entrance fee in 2020, with the average change limited to -1%.

The change was more significant in rural (at -8%) and urban (at -5%) areas bringing the average price points for the different locations closer together than they have been historically.

% change in adult admission charge

	Average 2020 charge	2019/20 change (%)	2018/19 change (%)
Coastal (95)	£8.17	-1	+6
Rural (428)	£8.99	-8	+5
Urban (189)	£8.82	-5	+4

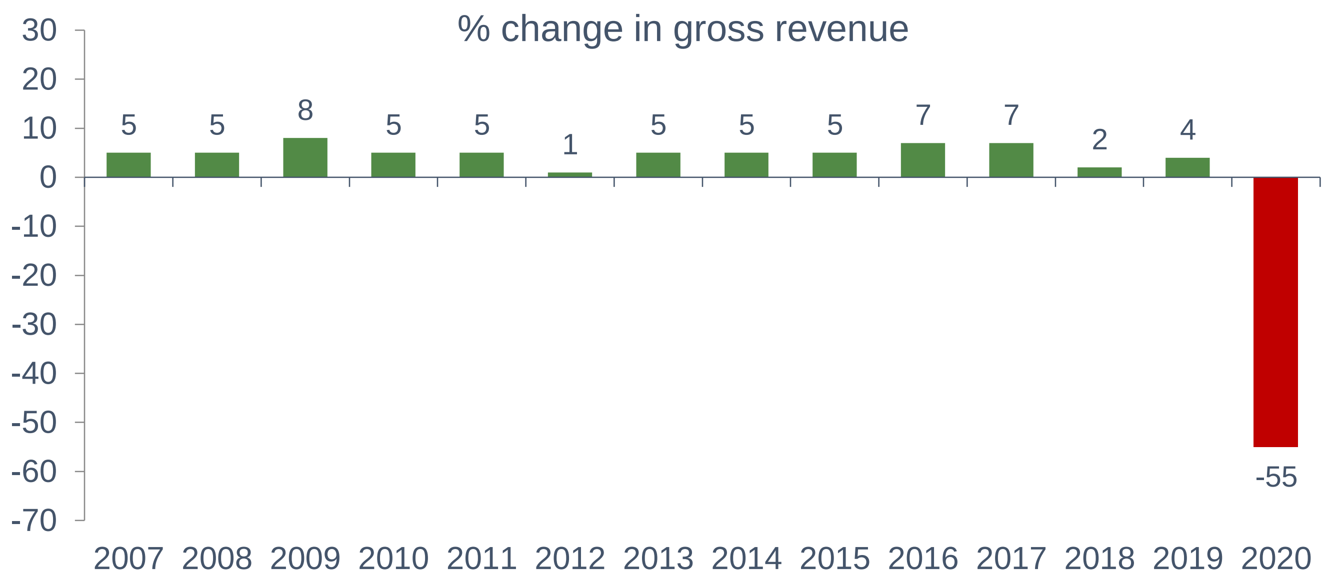
Base: All answering admission charge question in 2020 (712)
Base: All answering admission charge question in 2019 and 2020 (479)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gross Revenue Trend

At an overall level, the gross revenue at visitor attractions decreased by -55% in 2020. This decline is smaller than that seen in visitor admissions (-65%), despite the drop in admissions price at charging attractions.

The impact of lower admissions on revenue is likely to have been reduced through other income generating activity and funding.

Consistent with admissions, indoor attractions (two thirds of which are museums/galleries) saw the biggest hit on their gross revenue in 2020, with a decline of -60%, whereas this was limited to -46% at outdoor attractions.



	% change in gross revenue by site type
Mostly Indoors (290)	-60
Evenly Mixed (66)	-56
Mostly Outdoors (151)	-46

Base: All answering revenue question (611)
Base: All attractions providing visits data for current and previous year (984)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gross Revenue Trend 2020: By Attraction Category

All attraction categories reported a fall in gross revenue, but there was a wide range in the extent of the decline.

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

% change in gross revenue

	2019/20 change (%)	2018/19 change (%)
Country Parks (16) <50	-26	+4
Farms (18) <50	-38	+8
Gardens (34) <50	-44	+3
Historic Houses / Castles (72)	-58	+7
Other Historic Properties (54)	-63	-4
Leisure / Theme Parks (<10)	(<10)	+2
Museums / Art Galleries (258)	-55	+4
Steam/Railways (29) <50	-63	+1
Visitor / Heritage Centres (42) <50	-65	+10
Wildlife Attractions / Zoos (31) <50	-36	+2
Workplaces (13) <50	-60	+7
Places of Worship (22) <50	-60	+6
Other (13) <50	-69	+3

Base: All answering revenue question (611)
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, therefore not shown

Gross Revenue Trend 2020: By Region

For all but two regions the decline in revenue stood between 50 to 60%. The exceptions were:

- Yorkshire & The Humber, which outperformed the sector average, limiting revenue decline to -35% of 2019 yield.
- London, which suffered the largest drop in gross revenue with the average decline standing at -67%.

% change in gross revenue

	2019/20 change (%)	2018/19 change (%)
North West (62)	-60	+1
North East (24) <50	-56	+2
Yorks / Humber (52)	-35	+7
East Midlands (68)	-59	*
West Midlands (51)	-58	+5
East (95)	-51	*
London (30) <50	-67	+9
South East (127)	-59	+9
South West (102)	-53	+6

Base: All answering revenue question (611)
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)

Gross Revenue Trend 2020: By Admission Charge, Destination Type & Visit Volume

There is a clear relationship between attraction size and the degree of revenue decline associated with the COVID-19 pandemic.

Large attractions with over 100k visitors a year were better able to cushion the impact, reporting an average decline in revenue of -45%. This increased up to 60% amongst attractions that typically attract fewer than 20k visitors. This is not explained by the change in visitor numbers or admission prices. Instead it is likely that larger attractions had more resources to raise income through other means (for example, an online shop or fundraising initiatives).

From a geographical perspective it was coastal attractions that saw the largest fall in gross revenue (-64%), while rural and urban areas both performed slightly better than average.

Free and charging sites reported similar levels of revenue change in 2020.

% change in gross revenue: free / paid

	2019/20 change (%)	2018/19 change (%)
Free (269)	-54	+1
Paid (339)	-55	+6

% change in gross revenue: geographic location

	2019/20 change (%)	2018/19 change (%)
Coastal (73)	-64	+7
Rural (326)	-53	+3
Urban (212)	-54	+4

% change in gross revenue: attractions size

	2019/20 change (%)	2018/19 change (%)
Up to 20k p.a. (315)	-60	+4
20k – 50k p.a. (106)	-56	+5
50k – 100k p.a. (59)	-54	+10
100k – 200k p.a. (33) <50	-45	+4
Over 200k p.a. (65)	-45	+5

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

Base: All answering revenue question (611)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

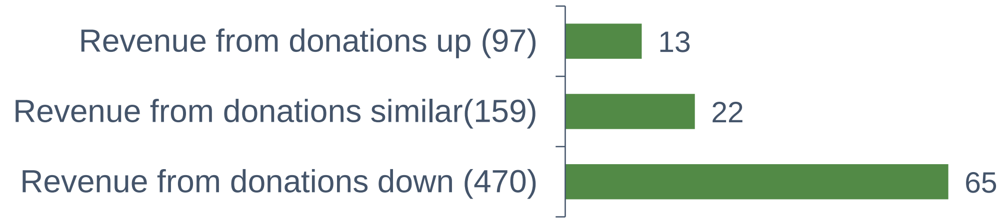
Donation Revenue Trend 2020

With the loss of onsite donations for several months of the year, it is unsurprising that revenue from donations was down for almost two thirds of visitor attractions in 2020.

Charging sites were more successful in their request for donations with the net of sites reporting donation revenues up minus those reporting donation revenues down of -37% vs. -74% for free attractions.

We also see the change in donations vary by site size with smaller sites that typically welcome less than 50,000 visitors being more likely to have seen a decline in donation revenue in 2020.

% change in revenue from donations in 2020 compared with 2019



% change in revenue from donations in 2020 compared with 2019: free / paid

%	Revenue down	Revenue similar	Revenue up	NET (increase minus decrease)
Free (286)	80	14	6	-74
Paid (425)	55	27	18	-37

% change in revenue from donations in 2020 compared with 2019: attraction size

	Revenue down	Revenue similar	Revenue up	NET (increase minus decrease)
10k or less p.a. (233)	75	18	7	-68
10k - 50k p.a. (244)	64	22	14	-50
50k - 100k p.a. (76)	58	21	21	-37
Over 100k p.a. (148)	57	24	19	-38

Base: All answering revenue from donations question (726)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Gift Aid Revenue Trend 2020

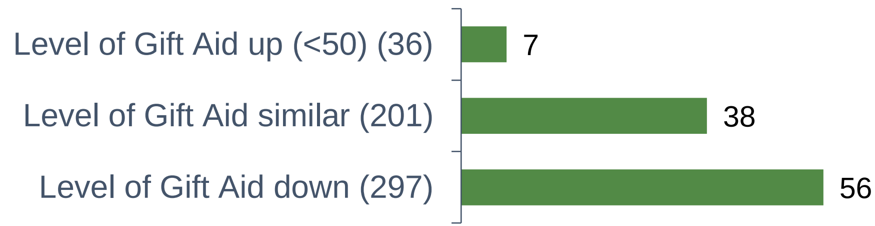
The attractions sector saw a decline in gift aid revenue in 2020, with 56% of attractions reporting a decline.

However, this income source proved more stable than donations, with 38% of sites maintaining a similar level to 2019. It is likely that membership schemes provided some stability.

Free sites were more likely to report a decrease in gift aid revenue than charging sites, with a net decline of -62% for free sites compared with -38% for sites with an entrance fee.

Smaller sites with less than 10,000 visitors a year were worse hit, with 65% reporting a drop in gift aid revenue

% change in Gift Aid in 2020 compared with 2019



% change in Gift Aid from tickets, memberships and donations in 2020 compared with 2019: free / paid

%	Gift Aid down	Gift Aid similar	Gift Aid up	NET (increase minus decrease)
Free (241)	64	33	2	-62
Paid (279)	48	42	10	-38

% change in Gift Aid from tickets, memberships and donations in 2020 compared with 2019: attraction size

	Gift Aid down	Gift Aid similar	Gift Aid up	NET (increase minus decrease)
10k or less p.a. (190)	65	32	3	-62
10k - 50k p.a. (168)	47	42	11	-36
50k - 100k p.a. (57)	46	49	5	-41
Over 100k p.a. (105)	59	33	8	-51

Base: All answering level of Gift Aid question (534)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Employment Trends

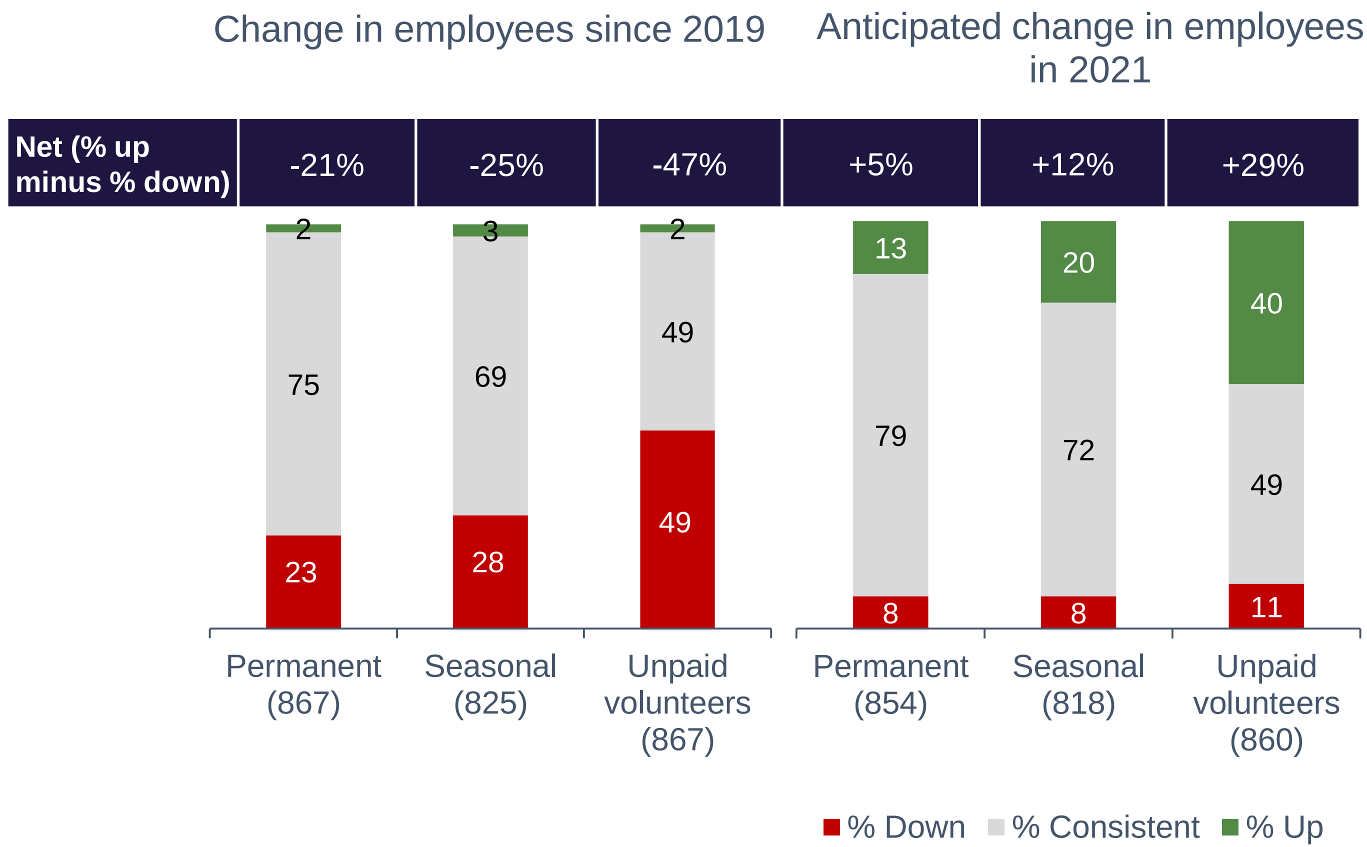
Overall Employment Trends

In 2020, 77% of attractions employed permanent staff, 57% employed seasonal staff and 80% used unpaid volunteers, all lower than in 2019 (83%, 65%, 87% respectively).

The number of these staff also reduced at a sector level, but the majority of sites managed to protect their permanent and seasonal workers, with help from the furlough scheme. Year on year net changes (% increase minus % decrease) changes are detailed below:

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

This is in line with last years' surveyed expectations that all types of staff would reduce in 2020 due to the COVID-19 pandemic. Looking ahead to 2021, attractions are more hopeful that staffing levels will recover.

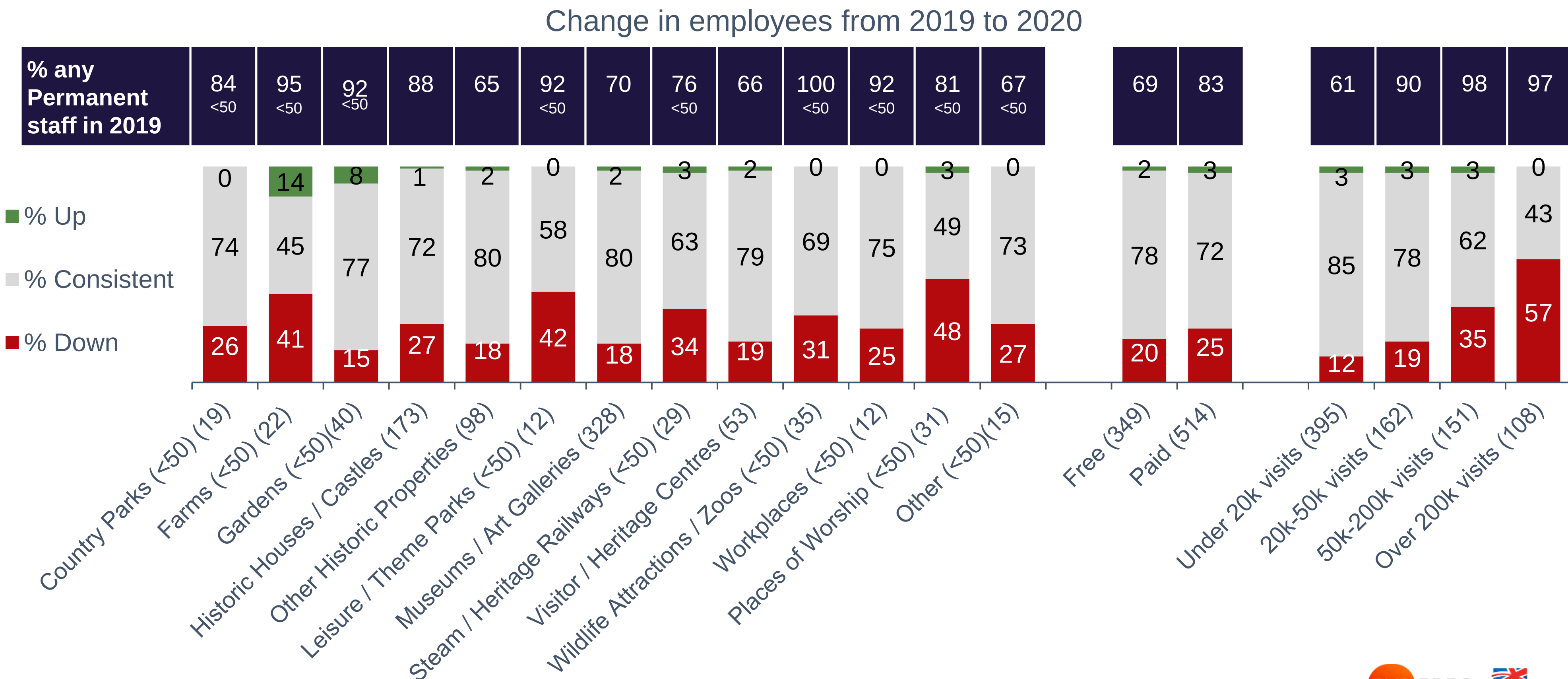


Base: All answering employment questions

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

Permanent Employees: 2019 – 2020 trends

Just one lost/ additional member of staff counts as a decrease/ increase regardless of the size of attraction, so it follows that change is more likely at larger attractions. In 2020 the proportion of sites reporting a decline in permanent staff follows this trend rising to 57% of large attractions (that would typically attract over 200,000 visitors).

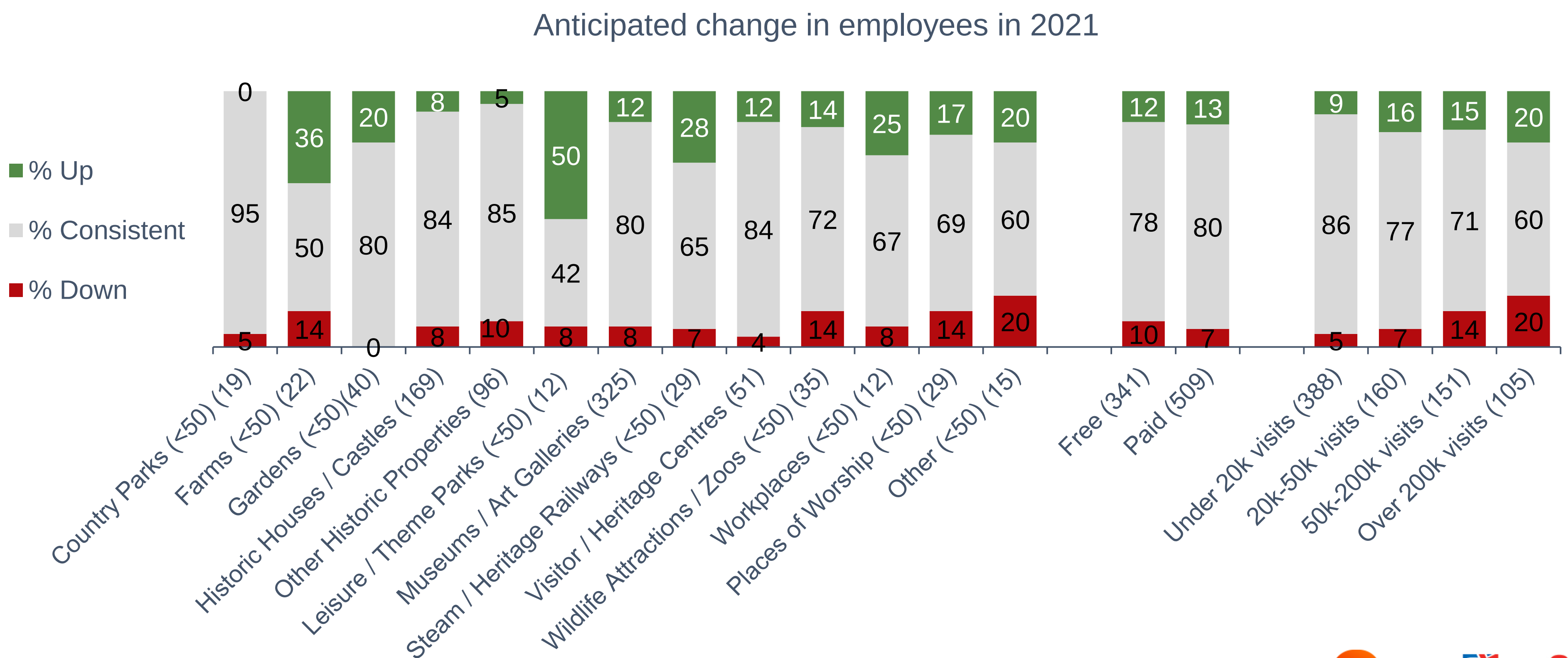


Base: All answering employment questions - permanent (867)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Permanent Employees: 2021 Predictions

Overall there is a consistent expectation across different types of attractions, that permanent staffing levels will remain fairly similar to 2020. A notable exception is Leisure / Theme parks which anticipate an increase of 50% in 2021 (although this should be treated with caution due to low base sizes). Historic properties and country parks are the most cautious with a net expectation (% up minus % down) for a further decline.

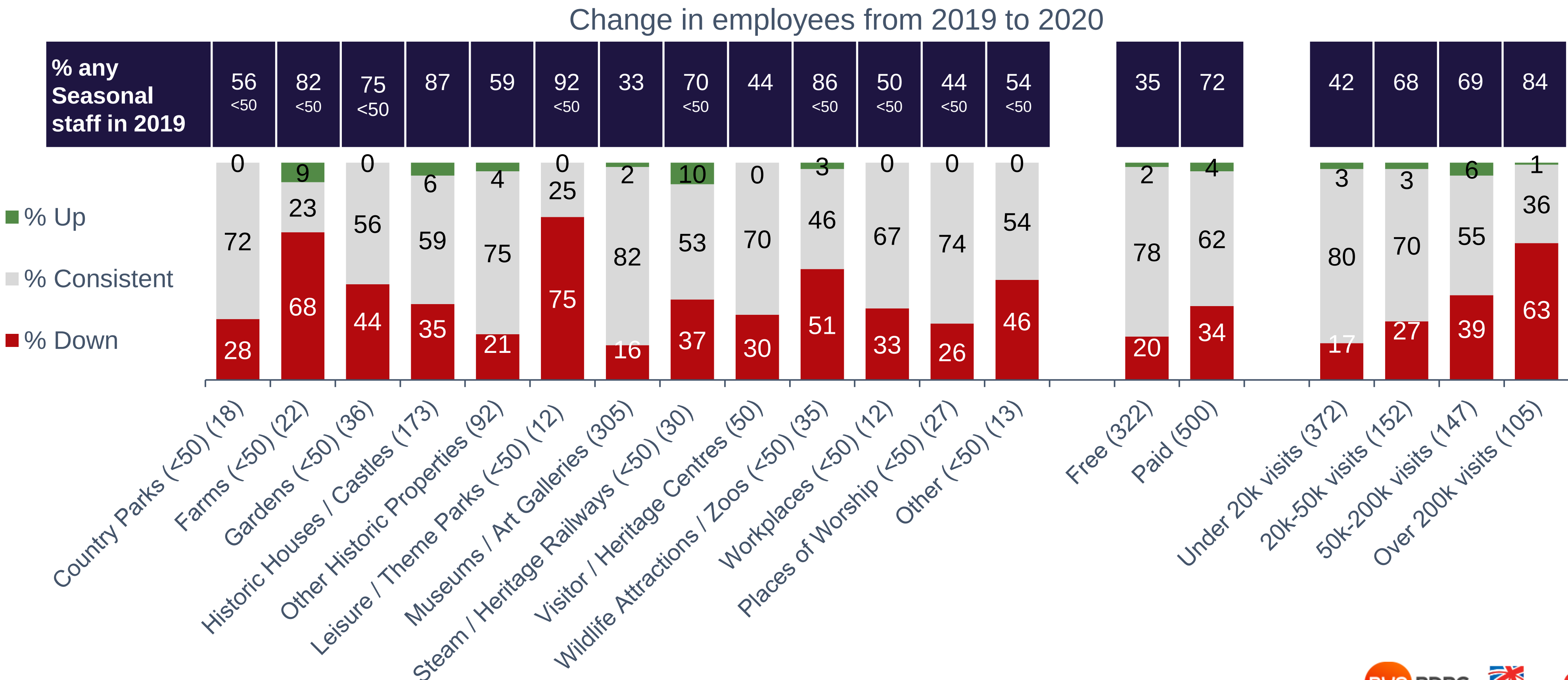


Base: All answering employment questions - permanent (854)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Seasonal Employees: 2019 – 2020 trends

Lockdown closures followed by capped admissions capacity means there was less need for seasonal staff in 2020. As we would expect the fall is particularly evident for categories traditionally most reliant on seasonal staff, such as leisure/ theme parks, farms and wildlife attractions.

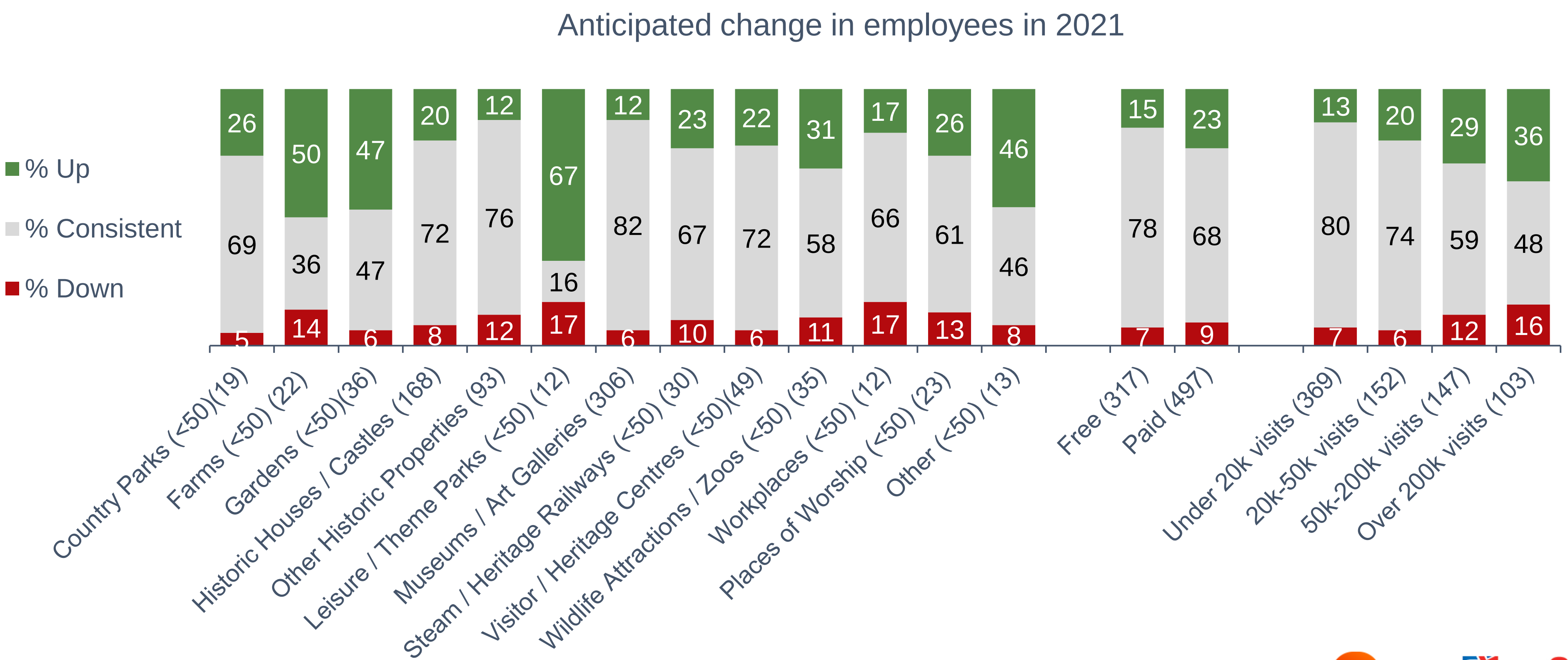


Base: All answering employment questions - seasonal (825)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Seasonal Employees: 2021 Predictions

Attractions anticipate a recovery in seasonal staffing in 2021, but if predictions are correct staffing will not return fully to 2019 levels.



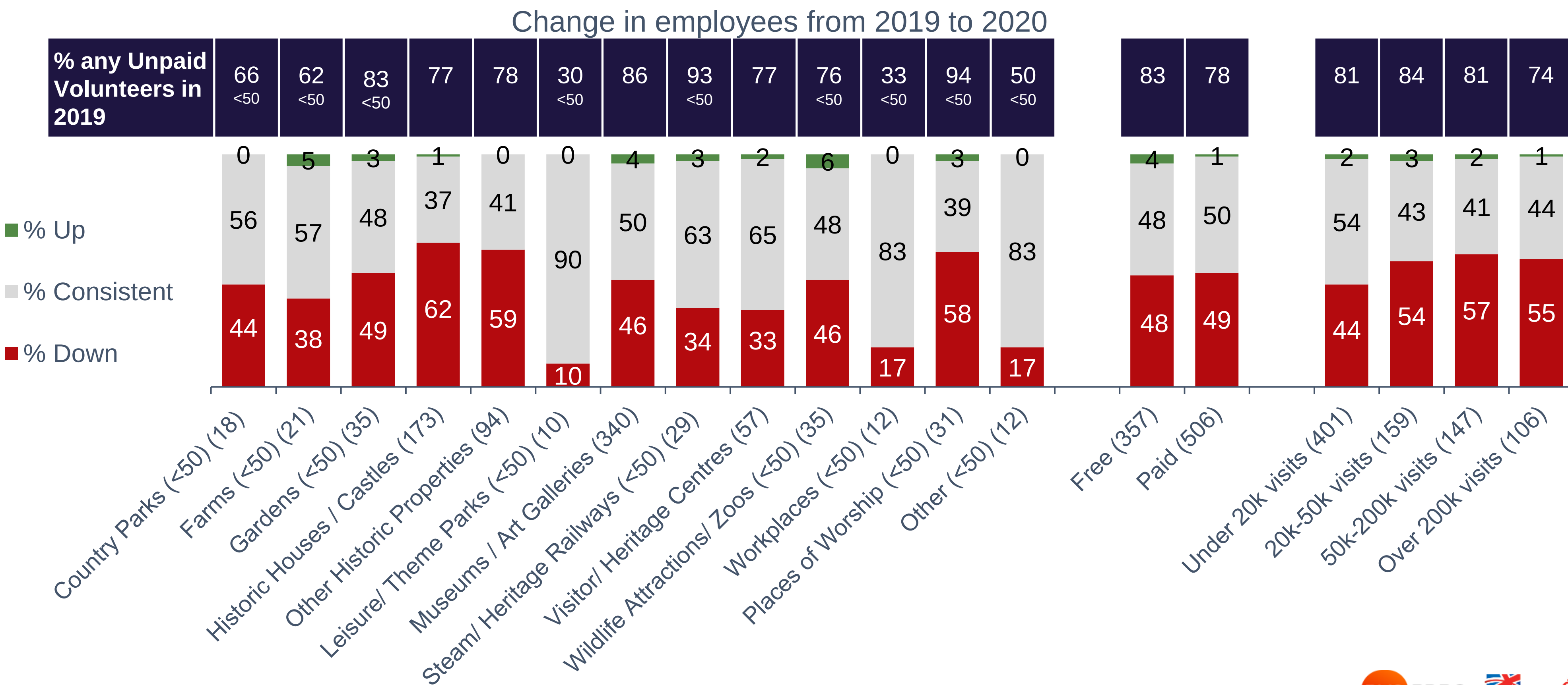
Base: All answering employment questions - seasonal (818)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Unpaid Volunteers: 2019 – 2020 trends

Unpaid volunteers are essential to the running of many attraction categories with 80% of all attractions using unpaid volunteers, rising to 93% of Steam/ Heritage Railways and 94% of Places of Worship.

The decline in volunteer participation was particularly marked at historic properties and places of worship.

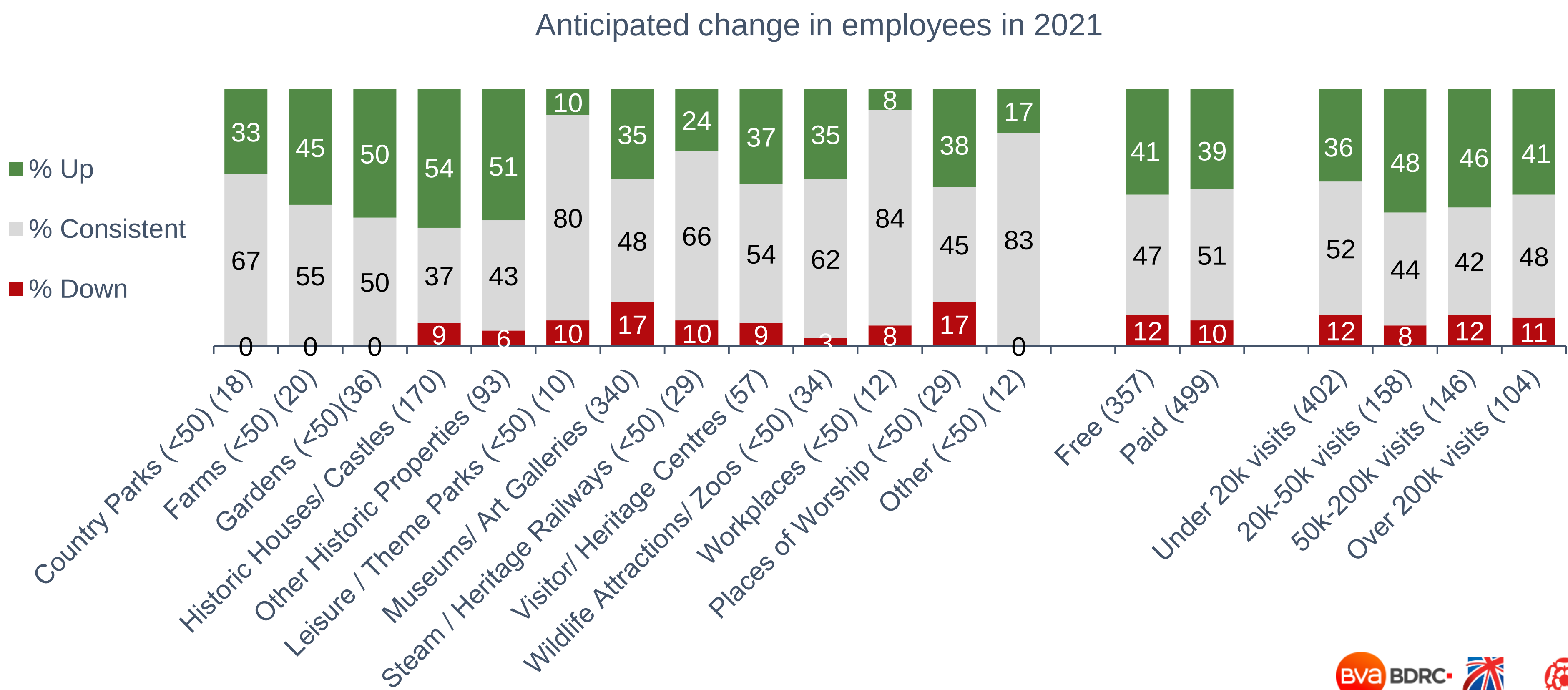


Base: All answering employment questions – unpaid volunteers (867)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Unpaid Volunteers: 2021 Predictions

Numbers of unpaid volunteers are expected to see some level of recovery in 2021 for the majority of different types of attractions, in particular historical properties.



Base: All answering employment questions – unpaid volunteers (860)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Furlough of permanent staff members

With the exception of Museums / Art galleries, all other attraction categories had over half of their permanent staff on furlough at some point in 2020 and several attraction categories (‘other historic properties’, farms, ‘other’ attractions and historic houses / castles) placed as much as 90% of their permanent staff on furlough.

Mean number of permanent staff employed before pandemic and furloughed during pandemic: by attraction type

	No. of Permanent Staff employed before pandemic (mean)	Highest No. of Permanent staff furloughed (mean)	Lowest No. of Permanent staff furloughed (mean)
Country Parks (<50) (18)	18	10	5
Farms (<50) (22)	31	29	5
Gardens (40)	41	25	6
Historic Houses/ Castles (172)	15	14	2
Other Historic Properties (94)	6	6	1
Leisure / Theme Parks (<50) (10)	56	44	10
Museums/ Art Galleries (349)	14	6	3
Steam / Heritage Railways (<50) (31)	14	9	2
Visitor/ Heritage Centres (57)	9	7	2
Wildlife Attractions/ Zoos (<50) (39)	39	21	6
Workplaces (<50) (13)	7	4	2
Places of Worship (<50) (27)	41	32	12
Other (<50) (18)	26	24	4

Base: All answering employment furlough questions (890)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Furlough of permanent staff members

Free attractions placed a higher proportion of their staff on furlough compared with charging attractions and at their highest levels, free attractions had to furlough an average of 75% of their permanent staff (15 out of 20 permanent staff members).

A consistent 64-67% of permanent staff were placed on furlough at the height of lockdown across the different sizes of attraction. However, larger sites (with over 200,000 visits a year) were more able to reduce their use of furlough during 2020.

Mean number of permanent staff employed before pandemic and furloughed during pandemic: by attraction charge and size

	No. of Permanent Staff employed before pandemic (mean)	Highest No. of Permanent staff furloughed (mean)	Lowest No. of Permanent staff furloughed (mean)
Free (367)	20	15	2
Paid (519)	14	6	4
Under 20k visits (514)	3	2	1
20k-50k visits (99)	9	6	3
50k-200k visits (114)	21	14	11
Over 200k visits (<50) (35)	88	56	7

Base: All answering employment furlough questions (890)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

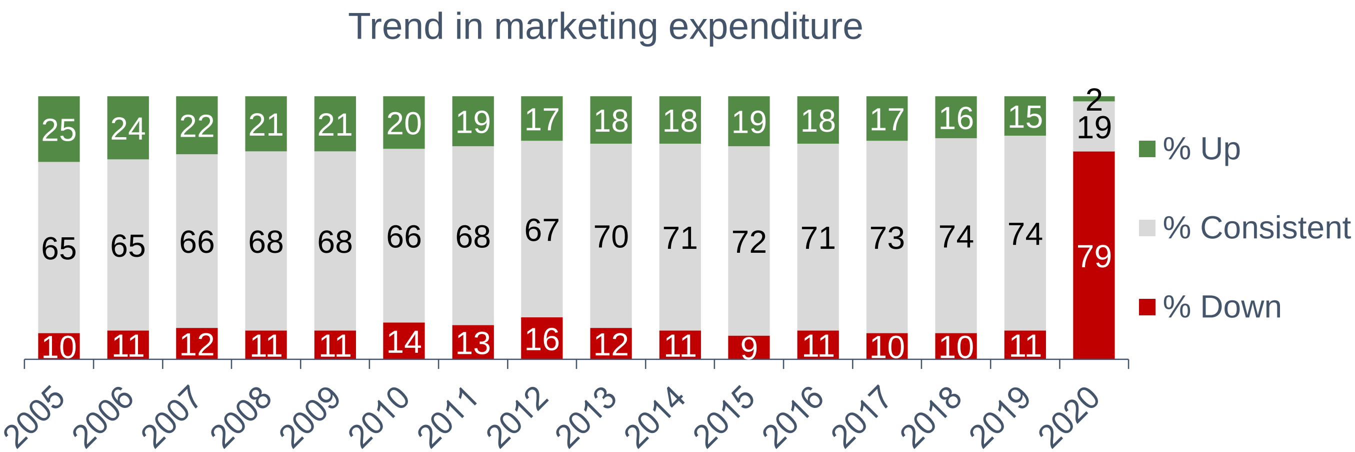
(<50) Base size below 50 (please treat with caution)

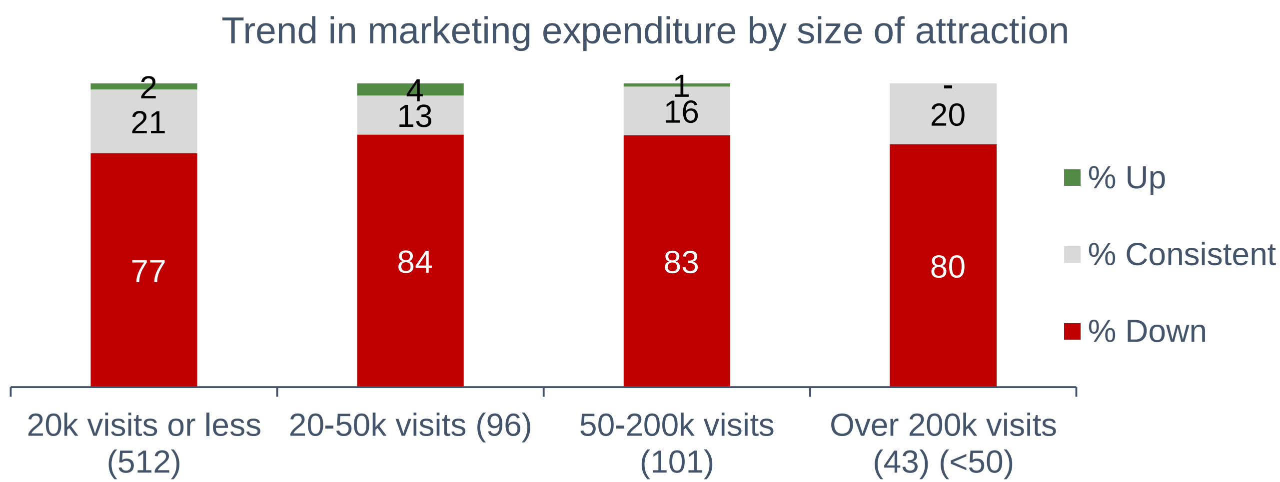
Marketing & Communications

Marketing Expenditure Trend

Site closure rendered standard marketing promotion redundant across a substantial proportion of the year. As such we saw marketing budgets reassigned, with 79% of attractions reducing spend compared with 2019.

This shift was evident across all attraction sizes.



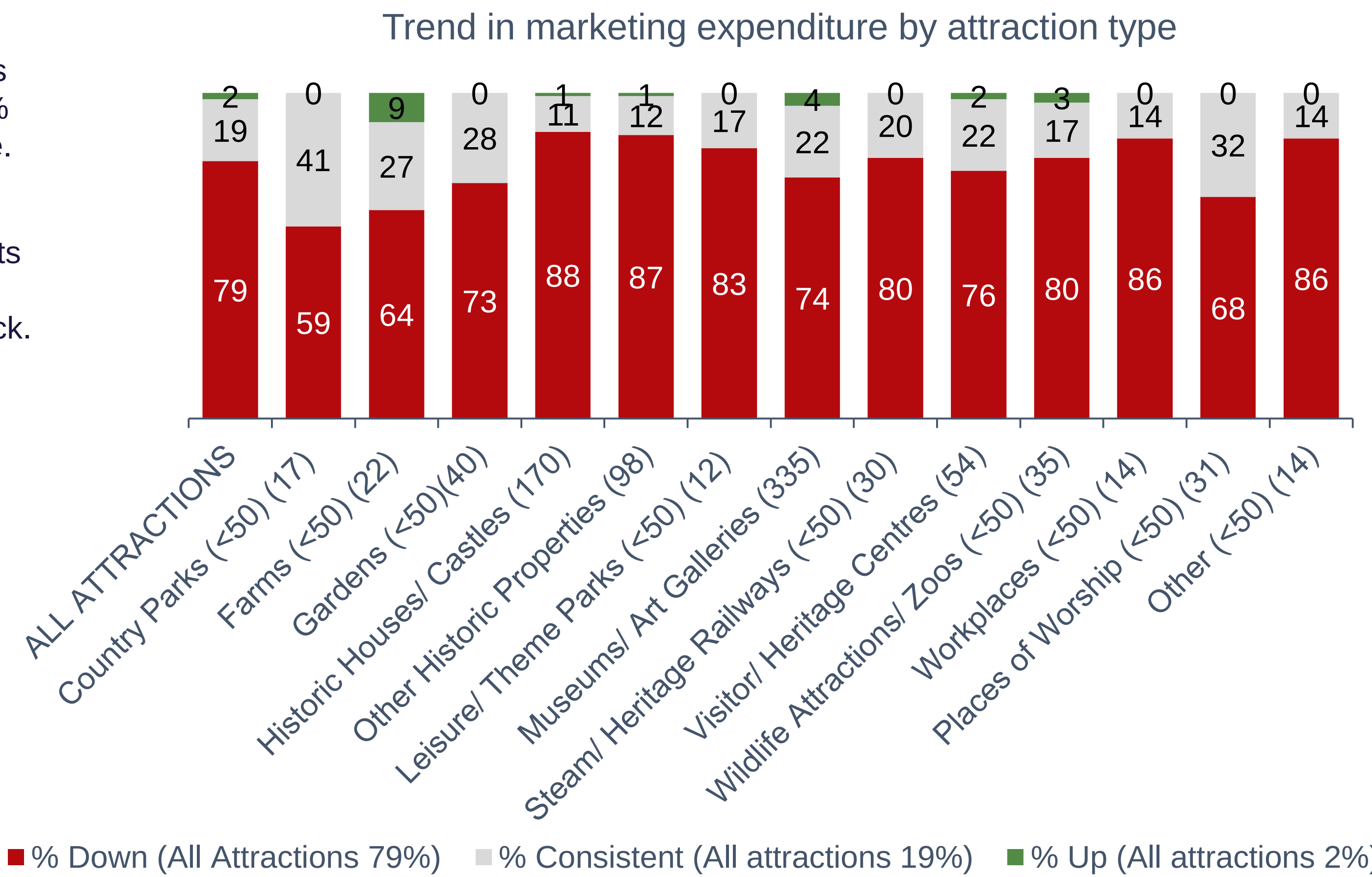


Base: All answering marketing question (872)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Marketing Expenditure Trends 2020: By Attraction Category

Country Parks were the attraction type least affected by the pandemic and this is reflected in their marketing, with 41% maintaining usual levels of expenditure.

Farm attractions typically make above average increases to marketing budgets and nearly 1 in 10 still did so in 2020, although the majority (64%) did cut back.



Base: All answering marketing question (872)

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

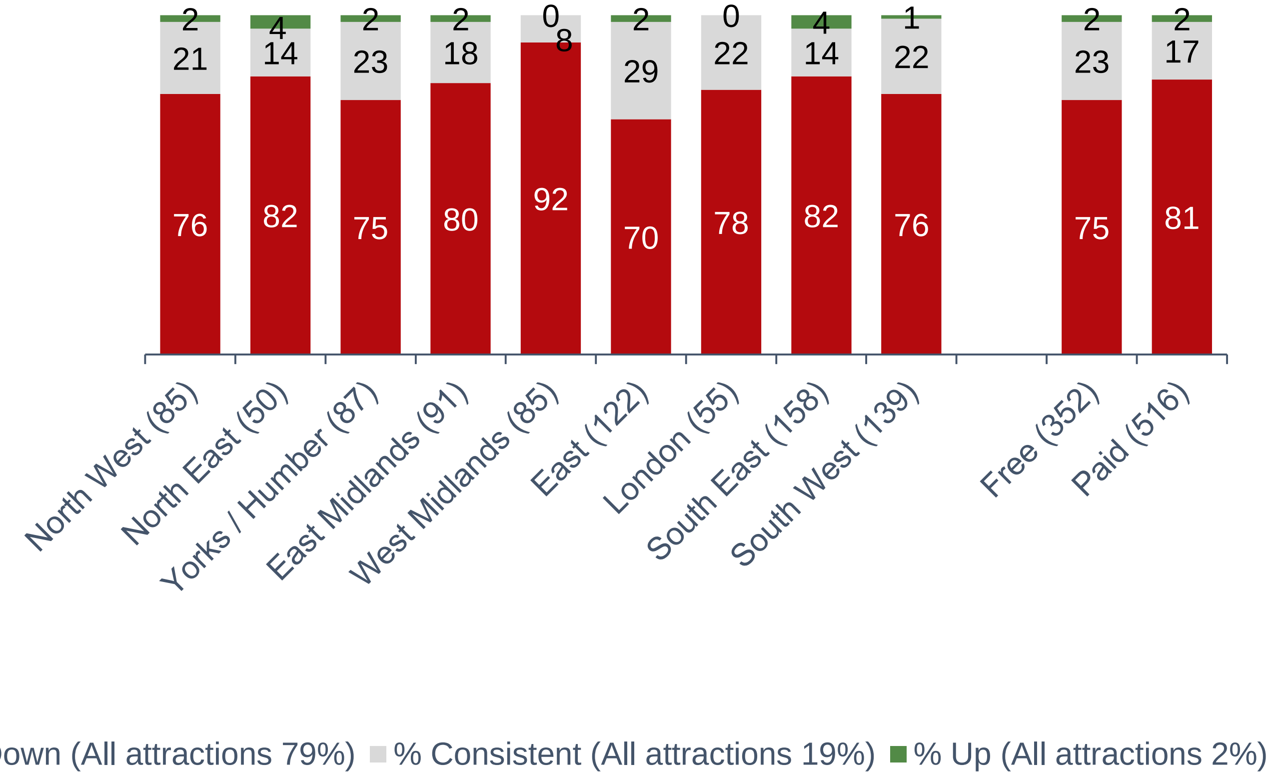
(<50) Base size below 50 (please treat with caution)

Marketing Expenditure Trends 2020: By Region & Admission Charge

Marketing budgets were cut across all regions, but was particularly evident in the West Midlands, where 92% of attractions cut expenditure.

Paid attractions were slightly more likely to cut their marketing budget (81%) than free attractions (75%).

Trend in marketing expenditure by region and free/ paid



Base: All answering marketing question (872)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

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

Digital Communications Offered

96% of attractions used digital communications to communicate with their audience during the pandemic, a 6% increase on 2019. Facebook (88%) and Twitter (64%) continue to be the dominant social media platforms but their penetration as a tool for attractions has plateaued.

In contrast YouTube saw the biggest increase, with 41% of attractions leveraging this tool in 2020, up from 33% in 2019.

Use of Instagram/ Pinterest and 'other' social media continues to rise, but at a slower rate than before. 25% used 'other' social media, a 5% increase on 2019, while the 60% using Instagram/ Pinterest is a modest 3% rise compared with the previous year.

The suite of digital tools that attractions make use of tends to increase according to attraction size, but the divide was less distinct in 2020, with 94% of attractions with less than 20,000 visitors using any digital communications in 2020 compared with 84% in 2019.

Digital communication channel

	% offered in 2020	% offered in 2019	% offered in 2018
ANY	**96**	**90**	**89**
Facebook page	88	87	86
Twitter account	64	67	66
Instagram/ Pinterest	60	57	52
E-newsletter	51	51	47
YouTube	41	33	30
Online blogs	34	36	30
Other social media	25	20	9
Mobile apps	18	17	17
Mobile website	8	8	9

Number of visits per annum

% offered	20k or less (532)	20k-100k (158)	Over 100k (108)
ANY	**94**	**98**	**99**
Facebook page	83	93	97
Twitter account	50	78	87
Instagram/ Pinterest	44	72	88
E-newsletter	39	58	76
YouTube	27	48	67
Online blogs	22	45	53
Other social media	18	27	37
Mobile apps	12	23	25
Mobile website	5	10	14

Base: All answering digital communications question (933)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Digital Communications Offered in 2020: By Attraction Category

Digital communication offered by attractions category

% offering	Country Parks (<50) (19)	Farms (<50) (22)	Gardens (<50) (44)	Historic houses / castles (176)	Other historic (100)	Leisure / theme parks (<50) (12)	Museum / art galleries (364)	Steam / heritage railways (<50) (30)	Visitor / heritage centres (61)	Wildlife / zoos (<50) (42)	Work-places (<50) (14)	Places of Worship (<50) (33)	Other (<50) (16)
ANY	95	95	95	97	92	92	96	97	93	98	93	100	94
Facebook	89	95	86	91	87	92	87	93	80	95	86	82	75
Twitter account	42	68	73	82	63	58	59	60	41	81	43	55	63
E-newsletter	26	50	41	71	56	67	48	47	31	55	29	39	25
Instagram/ Pinterest	53	82	73	81	59	83	51	53	31	74	64	45	63
YouTube	*	41	30	58	51	58	38	33	20	43	7	39	44
Online blogs	*	14	16	62	49	17	29	13	15	50	21	12	19
Mobile apps	11	9	*	48	39	25	7	*	10	5	*	6	6
Mobile website	5	*	7	9	7	8	10	13	2	12	21	3	*
Other social media	16	23	11	51	43	17	17	7	15	2	14	18	6
Website	95	95	95	96	92	92	92	97	89	88	93	97	94
Online booking	32	77	50	70	51	75	39	63	34	71	57	27	69

Base: All answering digital communications question (933)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

* % change is under 1%, therefore not shown
(<50) Base size below 50 (please treat with caution)

Marketing Activities in 2020: By Admission Charge

Attractions used the time they were closed productively, with 70% of sites producing online content or developing their digital offer to strengthen their audience and grow new and existing income streams.

Production of online tours and videos was the most popular activity with 41% of sites offering free video content, explaining the increase in use of YouTube. Attractions also tapped into parents' need for home schooling ideas, with 34% providing free family content.

Only 9% of attractions charged for any online content, with free attractions as likely to do so as charging attractions. However, 31% of sites did develop an online retail offer.

Measures attractions put in place to address the impact of COVID-19 and engage with audiences in 2020

%	All	Free (298)	Paid (454)
Online tours/ video content - for free	41	35	46
Home-schooling/ family content – for free	34	26	40
Developed online retail offer	31	19	41
Online learning (schools/adults) – for free	16	19	14
Online learning (schools/adults) – at a cost	5	6	5
Online tours/ video content – at a cost	5	3	7
Home-schooling/ family content – at a cost	1	2	1
None of these	30	32	27
NET: Provided any online content – at a cost	9	8	9

Base: All attractions answering marketing activities question (766)

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

Marketing Activities in 2020: By Attraction Size

Larger attractions have more resources and so were able to engage in more marketing activities than smaller sites. In total 85% of attractions that typically attract over 100,000 visitors a year engaged in any of the listed activities, versus only half of sites with less than 10,000 visitors.

Furthermore, large sites (with over 100,000 visitors) were more than three times as likely as small sites (with 10,000 visitors or less) to charge for any online content, with 18% versus 5% doing so.

Measures attractions put in place to address the impact of COVID-19 and engage with audiences in 2020

%	All	10k or less p.a. (232)	10k - 20k p.a. (114)	20k - 100k p.a. (221)	Over 100k p.a. (171)
Online tours/ video content - for free	41	25	43	49	62
Home-schooling/ family content – for free	34	15	30	47	53
Developed online retail offer	31	15	35	41	46
Online learning (schools/adults) – for free	16	6	10	23	32
Online learning (schools/adults) – at a cost	5	2	3	7	10
Online tours/ video content – at a cost	5	4	5	4	10
Home-schooling/ family content – at a cost	1	0	3	2	2
None of these	30	50	28	23	15
NET: Provided any online content – at a cost	9	5	7	9	18

Base: All attractions answering marketing activities question (766) N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

Impact of Marketing Activities

There is evidence that marketing activities helped to soften the reduction in gross revenue and, to a lesser degree, visitor admissions.

Provision of free content and developing or strengthening an online retail offer were both associated with a smaller fall in admissions and revenue.

Offering paid online content may have marginally bolstered revenue, but it seems to have had the opposite effect on visitor admissions – did creation of paid-for content distract from the provision of quality free material that may have reached a wider audience?

Impact of marketing activities on business performance

2019/20 % change in…	% change in total visitor admissions	% change in gross revenue
Offered FREE online content	-64	-54
Did not offer FREE online content	-66	-68
Offered PAID online content	-69	-61
Did not offer PAID online content	-65	-63
Developed online retail offer	-62	-54
Did not develop online retail offer	-67	-65
Offered FREE home schooling/ family content	-62	-57
Did not offer FREE home schooling/ family content	-67	-64

Base: All attractions answering marketing activities question and providing 2019 and 2020 figures for visitor admissions (819)/ gross revenue (520)

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

Appendix

Questionnaire: Main questions

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2020

VisitEngland — BVA BDRC

Please help VisitEngland establish trends in the attractions' sector in 2020 by taking part in our major annual survey, conducted by BVA Group, supported by Aurora and Documents Despatch. **ALL ATTRACTIONS COMPLETING THIS QUESTIONNAIRE WILL RECEIVE A PERSONALISED REPORT BENCHMARKING THEIR PERFORMANCE AND YOU WILL BE ENTERED INTO A PRIZE DRAW TO WIN £100.**

All information you provide will be treated in strictest confidence (we just ask permission to publish visitor numbers at Section 5.1). If there is any information you are unable to provide, you can skip this question, but we appreciate you completing as much of the questionnaire as possible.

Please complete the questions by ticking the relevant box ☑ or by writing on the line provided. Please return the questionnaire by **28th May 2021** in the pre-paid envelope provided. Please refer to the enclosed guidelines when completing the questionnaire.

To provide your response more quickly, you can complete this questionnaire ONLINE at www.visitenglandattractions.com. Simply login using the User Name and Password details printed below.

If any of the contact information printed below is incorrect or missing, please write in the correct details.

Contact Name:	Tel:	ID:
E-mail:	Name of Attraction:	User Name:
Position:	Website:	Password:
Address:	E-mail/ telephone for prize draw if different from the above:	Serial:

N.B: If the questionnaire should be sent to a different address, please supply separate details.

SECTION ONE – 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 ☐	Museum and / or Art Gallery ☐
Country Park ☐	Farm / Rare Breeds / Farm Animals ☐
Distillery / Vineyard or Brewery ☐	Nature Reserve / Wetlands / Wildlife Trips ☐
Garden ☐	Safari Park / Zoo / Aquarium / Aviary ☐
Heritage / Visitor Centre ☐	Steam / Heritage Railway ☐
Historic House / House and Garden / Palace ☐	Other Historic / Scenic Transport Operator ☐
Historic Monument / Archaeological Site ☐	Industrial / Craft Workplace ☐
Place of Worship (still in use) ☐	Science / Technology Centre ☐
Other Historic Property ☐	Other *(Please specify below)* ☐
Leisure / Theme Park ☐	

1.2 Which of these best describes the location of your attraction? Coastal ☐ Rural ☐ Urban ☐

SECTION TWO – VISITORS

2.1 For 2019, 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 2019 visitor numbers:

2.2 What were your visitor numbers during the 2020 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).

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

2.3 What percentage of total visitors in 2020 (paid and free) fell into each category? Adults %

Children %

TOTAL 100%

2.4 For 2019, your organisation provided us with a total number of school children visits of:

Approximately how many school children visited your attraction as part of an organised group in 2020?

Number of school children **Is this number:** Exact? ☐ An Estimate? ☐

2.5 Did you charge for admission to the main attraction in 2020? No ☐ Yes ☐

2.6 (a) Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2020 (including VAT): Adult £ . p Child £ . p

2.6 (b) And what was the standard admission charge (in high season / summer) per person for the main attraction in 2019 (including VAT): Adult £ . p Child £ . p

2.7 Origin of visitors:

For 2019, your organisation provided us with a percentage of visitors from overseas of %

(a) **What percentage of total visitors in 2020 do you estimate were from overseas?** %

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

i) What percentage of total visitors in 2020 do you estimate lived locally or within day trip distance of your attraction? %

ii) Compared with 2019, was the number of visitors living locally or within day trip distance in 2020:

Up ☐ Down ☐ Similar ☐

2.8 i) What percentage of your total visitors in 2020 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %

ii) Compared with 2019, was the number of family group visitors in 2020:

Up ☐ Down ☐ Similar ☐

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

(a) **How did the attraction's gross revenue in 2020 compare with 2019?** Up ☐ Down ☐ Similar ☐

(b) **What was the percentage increase / decrease?** %

3.2 Compared with 2019, was expenditure on marketing activities in 2020: Up ☐ Down ☐ Similar ☐

3.3 Which of the following digital communications did your main attraction offer in 2020?

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

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

Open all year round (aside from national lockdowns) ☐	Closed for part of the year – regular seasonal closure ☐	Closed for part of the year – for refurbishments/ repairs ☐	Closed for part of the year – unable to meet COVID requirements on site ☐
Closed for part of the year – due to regional lockdown ☐	Closed for part of the year – as not profitable to open ☐	Closed for part of the year –insufficient staff/ volunteers ☐	Closed for other reason not specified here ☐

SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2019, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2020 (including yourself, working owners and self employed)…?:

Permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Unpaid volunteers:* Up ☐ Down ☐ Similar ☐ None ☐

Seasonal: Up ☐ Down ☐ Similar ☐ None ☐

4.2 And compared with 2020, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2021 to be:

Permanent: Up ☐ Down ☐ Similar ☐ None ☐ *Unpaid volunteers:* Up ☐ Down ☐ Similar ☐ None ☐

Seasonal: Up ☐ Down ☐ Similar ☐ None ☐

4.3(a) How many permanent staff members were working for the site at the start of 2020, before the pandemic?

(b) How many permanent members of staff were placed on furlough at the height of the pandemic?

HOW CAN WE USE YOUR DATA?

The information you provide in this survey will be combined with results from other attractions and used to assess sector trends.

All data will be held in strict confidence by VisitEngland BVA Group, Aurora and Documents Despatch. We encourage attractions to provide permission to publish visitor numbers, which could help to raise the profile of your organisation.

P.1 Can we publish your total visitor numbers (Q2.2)? Yes ☐ No ☐

P.2 Historic England (previously known as English Heritage) uses the heritage data from this survey. Can we pass on data from your attraction for this purpose? Yes ☐ No ☐ Not a Heritage attraction ☐

P.3 From time to time local destination organisations request data to inform tourism development and planning locally. Can we pass on data from your attraction to organisations representing your area for this purpose? Yes ☐ No ☐

P.4 Would you be willing for BVA BDRC or VisitEngland to contact you (within 6 months) about any follow up questions resulting from this research? Yes – BVA BDRC only ☐ Yes – VisitEngland only ☐ Yes – both ☐ No, neither ☐

I declare that the information provided on this form is true to the best of my knowledge.

Signed: ………………………… **Date:** …………………………

Name: (BLOCK CAPITALS) ………………………… **Job Title:** …………………………

If you would prefer to take part in this survey online in future, please write in your **Email Address:** …………………………

Thank you for participating in this survey. Please return the completed questionnaire by 28th **May 2021** in the pre-paid envelope. No stamp is required. If you wish to contact someone about the survey then please do not hesitate to contact: Keri Portas (VisitEngland) e: annualattractionssurvey@visitengland.org, or Tanya Sharapova (BVA BDRC), e: annualattractionssurvey@bva-bdrc.com.

Questionnaire: Main questions

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SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2020

SECTION ONE – ATTRACTION DETAILS

1.1 In past years, your main attraction category was:

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

Castle / Fort
Country Park
Distillery / Vineyard or Brewery
Garden
Heritage / Visitor Centre
Historic House / House and Garden/ Palace
Historic Monument / Archaeological Site
Place of Worship (still in use)
Other Historic Property
Leisure / Theme Park
Museum and / or Art Gallery
Farm / Rare Breeds / Farm Animals
Nature Reserve / Wetlands / Wildlife Trips
Safari Park / Zoo / Aquarium / Aviary
Steam / Heritage Railway
Other Historic / Scenic Transport Operator
Industrial / Craft Workplace
Science / Technology Centre
Other *(Please specify below)*

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

SECTION TWO – VISITORS

2.1 For 2019, 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 2019 visitor numbers:

2.2 What were your visitor numbers during the 2020 Calendar Year? (Please exclude special events outside normal opening hours or any private hire).

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

2.3 What percentage of total visitors in 2020 (paid and free) fell into each category?

Adults % / Children % = Total 100%

2.4 For 2019, your organisation provided us with a total number of school children visits of:

Approximately how many school children visited your attraction as part of an organised group in 2020?

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

2.5 Did you charge for admission to the main attraction in 2020? No / Yes

2.6 (a) Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2020 (including VAT): Adult / Child

2.6 (b) And what was the standard admission charge (in high season / summer) per person for the main attraction in 2019(including VAT): Adult / Child

BDRC VisitBritain VisitEngland

Questionnaire: Main questions

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2.7 Origin of Visitors: For 2019, your organisation provided us with a percentage of visitors from overseas of %

(a) What percentage of total visitors in 2020 do you estimate were from overseas? %

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

i) What percentage of total visitors in 2020 do you estimate lived locally or within day trip distance of your attraction? %

ii) Compared with 2019, was the number of visitors living locally or within day trip distance in 2020: Up / Down / Similar

2.8 i) What percentage of your total visitors in 2020 do you estimate visited your attraction as part of a family group (i.e. visited with children aged under 18)? %

ii) Compared with 2019, was the number of family group visitors in 2020:
Up / Down / Similar

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

a) How did the attraction's gross revenue in 2020 compare with 2019? Up / Down / Similar

b) What was the percentage increase / decrease? %

3.2 Compared with 2019, was expenditure on marketing activities in 2020:
Up / Down / Similar

3.3 Which of the following digital communications did your main attraction offer in 2020?
Website / Online booking facility (tickets, events) / Facebook page / Instagram/Pinterest / Separate mobile website / E-newsletters / Twitter account / Mobile apps / Online blogs / YouTube / Other social media / None of these

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

Open all year round (aside from national lockdowns)
Closed for part of the year– due to regional lockdown
Closed for part of the year– regular seasonal closure
Closed for part of the year– as not profitable to open
Closed for part of the year– for refurbishments/ repairs
Closed for part of the year– insufficient staff/ volunteers
Closed for part of the year– unable to meet COVID requirements on site
Closed for other reason not specified here

Questionnaire: Main questions up until 4.3b

Thereafter additional online questions

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SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2019, was the number of people employed (full or part time) in any tourism-related activities in the attraction in 2020 (including yourself, working owners and self employed)…?:
Permanent: Up / Down / Similar / None
Seasonal: Up / Down / Similar / None
Unpaid volunteers: Up / Down / Similar / None

4.2 And compared with 2020, do you anticipate the number of people employed (full or part time) in any tourism-related activities in the attraction in 2021 to be:
Permanent: Up / Down / Similar / None
Seasonal: Up / Down / Similar / None
Unpaid volunteers: Up / Down / Similar / None

4.3 a) How many permanent staff members were working for the site at the start of 2020, before the pandemic?
b) How many permanent members of staff were placed on furlough at the height of the pandemic?
c) What has been the lowest number of permanent staff on furlough since the start of the pandemic in March 2020?

4.4 a) In normal years, aside from any cafes and shops, is your attraction: Completely outdoor / Majority outdoor / Evenly mixed indoor/outdoor / Majority indoor / Completely indoor
b) Following the event of the pandemic in 2020, aside from any cafes and shops, is your attraction: Completely outdoor / Majority outdoor / Evenly mixed indoor/outdoor / Majority indoor / Completely indoor

SECTION FIVE – IMPACT OF COVID

5.1 In a typical year what months do you usually open? Please include all months where you would normally be open for at least half of the month. January / February / March / April / May / June / July / August / September / October / November / December

5.2 In which months was the site open for the majority of the month? Open in 2019: January / February / March / April / May / June / July / August / September / October / November / December **Open in 2020 :** January / February / March / April / May / June / July / August / September / October / November / December

5.3 Which months was the area / region of the site subject to a national or regional (tier 3 or tier 4) lockdown? Please indicate the months in lockdown, regardless of whether or not your site had to close, where lockdown was in place for the majority of the month. January / February / March / April / May / June / July / August / September / October / November / December

Questionnaire: Additional online questions

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5.4a Have you had to introduce new measures to manage the number of visitors at your site? Yes / No
5.4b What was the opening capacity of your site following the first national lockdown? Please write in as a percentage of the total capacity in 2019 (e.g. if you capped visitors at 500 per day, but in 2019 this cap would have been set at 1000, then this is 50% of 2019 capacity). %
5.5 What was the maximum capacity of your site by the end of 2020, or at the point you closed your site for the year, as a percentage of the maximum capacity in 2019? %
5.6 During 2020 did you require visitors to pre-book visits to your site? Yes – visitors were only allowed in if they pre-booked their tickets / Yes – but some walk ups were permitted where capacity allowed / No
5.7 Do you intend to continue to require the pre-booking system when restrictions on visitor numbers are lifted? Yes / No
5.8 Does your attraction have an online booking system? Yes – introduced in 2020 / Yes – introduced in 2019 or before / No
5.9 Comparing 2020 with 2019, did you see the overall revenue from donations increase, stay the same or decrease? Increased / Stayed the same / Decreased
5.10 Comparing 2020 with 2019, did you see the level of gift aid received from tickets, memberships and donations increase, stay the same or decrease? Increased / Stayed the same / Decreased
5.11 What, if anything, did your business do to address the impact of COVID-19 and engage with your audiences in 2020?
Developed your online retail offer
Offered online tours/ video content - for free
Offered online tours/ video content – at a cost
Offered home-schooling/ family content – for free
Offered home-schooling/ family content – at a cost
Offered online learning (schools/adults) – for free
Offered online learning (schools/adults) – at a cost
None of these

Questionnaire: Additional online questions

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5.12 What, if any, measures did your business put in place as a result of the COVID-19 pandemic to enable you to continue to engage with your audiences in 2020?

Obtained the 'We're Good To Go' industry standard
Closure of communal areas (e.g. games areas, bars, restaurants, toilets etc.)
Enforced social distancing
Enhanced cleaning regimes
Hand sanitizers
Certification for complying with official hygiene and distancing guidelines
Contactless check-in and payments
Daily staff health checks
Daily guest health checks
None of these