VisitEngland

Visitor Attraction Trends in England 2014

Full Report

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), Historic England and The National Trust as well as several Destination Management Organisations, councils and museum groups. Where relevant this has been referenced in the report.

Statistics in this report are given in good faith on the basis of information provided by proprietors of attractions. VisitEngland regrets it cannot guarantee the accuracy of the information contained in this report nor accept responsibility for error or misrepresentation.

Published by VisitEngland (incorporated under the 1969 Development of Tourism Act as the British Tourist Authority)

VisitEngland is grateful to Historic England for their financial support for the 2014 survey.

July 2015

Introduction

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

Objectives

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

Survey Method

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

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

A copy of the questionnaire is appended.

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

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

Visitor Attraction Definition

"…an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc."

Sample and Response

VisitEngland tightened its definition and undertook a major review of attractions used for the 2013 survey.

For example, parish churches and small art galleries with a retail focus were removed from the attractions list.

This removed a number of small sites previously classified as attractions, and we therefore saw a slight shift in the attraction size profile of sites participating in the research in 2013.

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

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

5,555 English visitor attractions were invited to take part in this year's survey.

1608 English visitor attractions responded to the survey in 2015:

- 888 completed online
- 428 completed by post
- 292 provided data through umbrella organisations

1,583 attractions gave 2014 visitor numbers.

1,491 attractions provided admissions for both 2014 and 2013 and these attractions form the basis of this report's visitor trend evaluation.

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Sample and Response (1)

Response by attraction category

Category	No. attractions providing data for 2013 & 2014	Profile of attractions providing data	
		2014	2013
Country Parks	53	4%	4%
Farms	54	4%	3%
Gardens	92	6%	6%
Historic properties	470	32%	32%
Leisure / theme parks	24	2%	1%
Museums / art galleries	497	33%	32%
Steam / heritage railways	35	2%	2%
Visitor / heritage centres	82	5%	5%
Wildlife attractions / zoos	74	5%	5%
Workplaces	26	2%	2%
Places of worship	62	4%	5%
Other	22	1%	4%
Total	**1,491**		

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Sample and Response (2)

Response by region

Category	No. attns. giving 2013 & 2014 data	Profile of attractions providing data	
		2014	2013
North West	149	10%	11%
North East	88	6%	5%
Yorks/Humber	144	10%	9%
East Midlands	135	9%	9%
West Midlands	132	9%	10%
East	198	13%	13%
London	104	7%	7%
South East	279	19%	19%
South West	262	18%	17%
Total	**1,491**		

Response by attraction size and admission type

Category	No. attns. giving 2013 & 2014 data	Profile of attractions that provided data	
		2014	2013
Annual Visits			
10,000 or less	467	31%	33%
10,001–20,000	196	13%	14%
20,001–50,000	288	19%	20%
50,001–100,000	181	12%	11%
100,001–200,000	138	9%	9%
Over 200,000	221	15%	13%
Total	**1,491**		
Admission			
Free	564	38%	38%
Paid	927	62%	62%
Total	**1,491**		

Headlines (1)

Attractions reported a healthy **4% annual increase** in total visits to visitor attractions in 2014 (adults and children), consolidating the sector's return to growth.

The UK economy continued to strengthen in 2014, and with it consumer confidence. Inbound tourism reached record levels and contributed to an increase in overseas visits to attractions (+8%). However, sector growth was limited by a decline in domestic holidays.

The weather in 2014 was mixed –high temperatures and more sun than usual were offset against spells of storms and heavy rain during the year, which brought damaging winds and flash flooding.

2014 saw a change in fortunes of the regions. Growth in 2013 was most marked in London at +8%, but the city only managed to improve visitor numbers by 2% in 2014 – half the average growth of attractions across the whole of England. Instead, it was the East of England that saw the most significant growth, reflecting the positive change in overnight stays by domestic tourists (+10%).

All sectors, aside from Places of worship, have experienced growth in visitor numbers. The biggest growth was seen in Farm attractions and Visitor/ heritage centres, continuing their success from 2013.

Gross revenue at attractions was up by +5% in 2014 – typical of growth levels reported over the last eight years. Almost half (48%) of attractions reported an increase in gross revenue in 2014 compared with only 16% reporting a decrease.

Contributing to this was the +4% increase in adult admission fees (consistent with previous years) and above average increase of child admission charges (+7%).

Headlines (2)

The eight year decline in the proportion of attractions reporting increases in marketing expenditure appears to have halted, but not reversed with only 7% more attractions expecting to increase their marketing spend than those anticipating a reduction in expenditure.

Use of digital communications (other than a website) continued to increase in 2014, albeit at a slower pace, with 83% of attractions now using at least one form of digital communications.

Facebook and Twitter remain the most popular platforms and are commonly used, even amongst smaller attractions. However, use of YouTube and Online blogs have increased the most, driven by attractions with less than 100,000 visitors.

Reliance on deals and discounts appears to be increasing with over half (56%) of attractions offering some form of deal or discount in 2014, up from 44% in 2013. This increases to 78% among charged admission attractions. Deals and discounts help to drive family and overseas visits, but their overall impact on admissions appears to be waning.

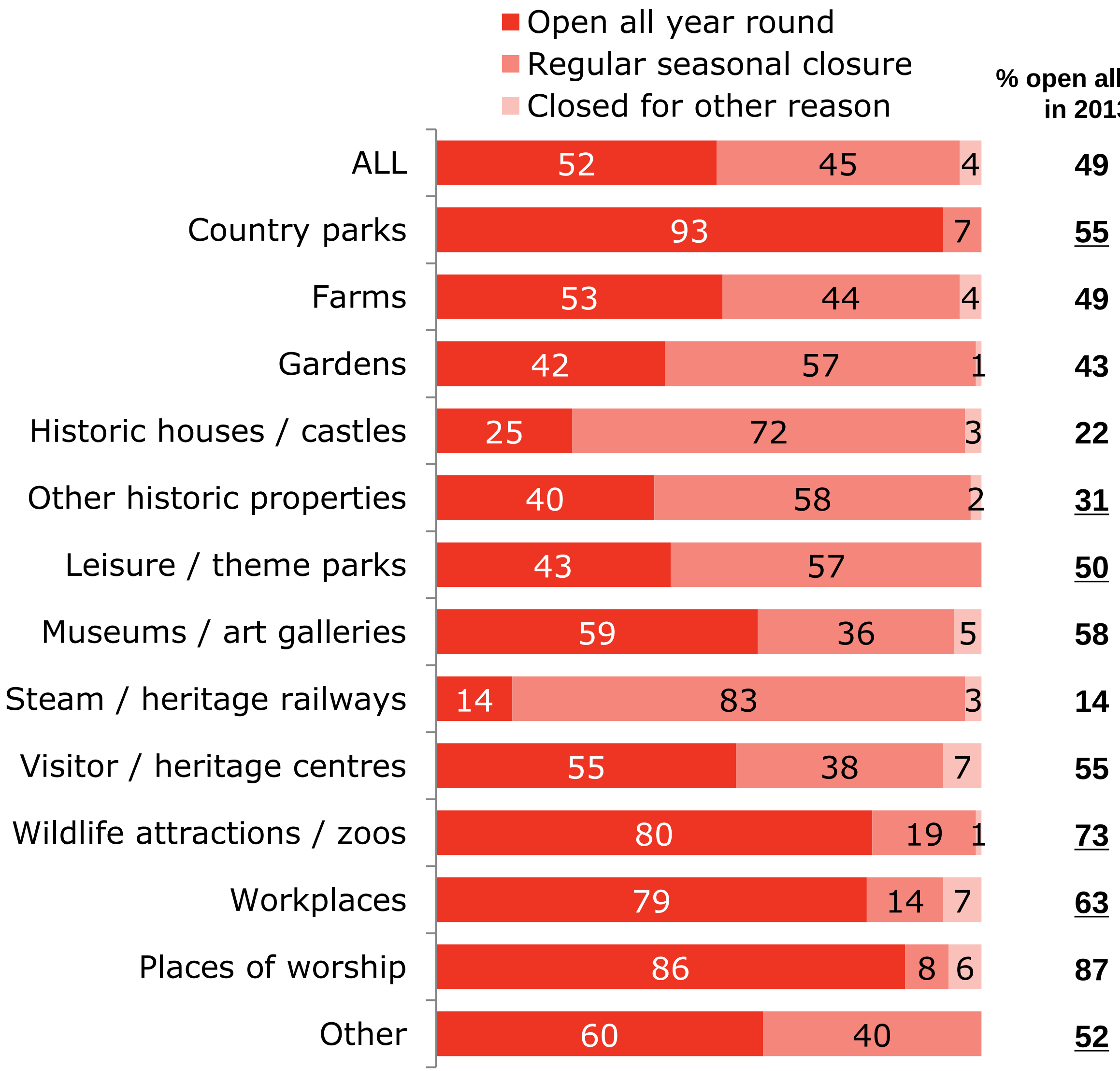
More sites increased their full time and part time permanent and seasonal employees than cut head counts in 2014 and with the financial climate improving attractions anticipate further increases in staff across all levels in 2015. However, the trend of increasing voluntary workers continued into 2014 and looks set to remain, with 28% of attractions expecting to increase their use of unpaid volunteers in 2015.

2014 Weather Summary *(source: Met Office)*

2014 was the warmest year on record (with records going back to 1910) and was slightly sunnier than the average across 1981 to 2010. However, there were spells of storms and heavy rain during the year, which brought damaging winds and flash flooding.

Winter 2013/14:	2014 started with winter storms in January and February, which brought damaging winds and high levels of rain, 174% of the norm from 1981-2010. This led to inland and coastal flooding. Temperatures were slightly above average at 5.8ºC (+1.6ºC above the norm for the time of year).
Spring 2014:	In comparison, Spring was fairly benign, and slightly warmer than average (9.8ºC, which is +1.3ºC of the 1981-2010 average).
Summer 2014:	The summer months continued in this vein until August when there was some further heavy rainfall, especially in south-east England, causing localised flash flooding.
Autumn 2014:	Autumn saw a shift to lower than average sunshine and rainfall, although the high temperatures continued (11.8ºC, which is 1.5ºC above the norm).

Attraction opening – by attraction category



Around half (52%) of attractions remain open all year round. This is consistent with last year (49%).

Country parks, places of worship, wildlife attractions and workplaces are the most likely to remain open year round. All of these sectors aside from places of worship are more likely to have remained open compared with 2013.

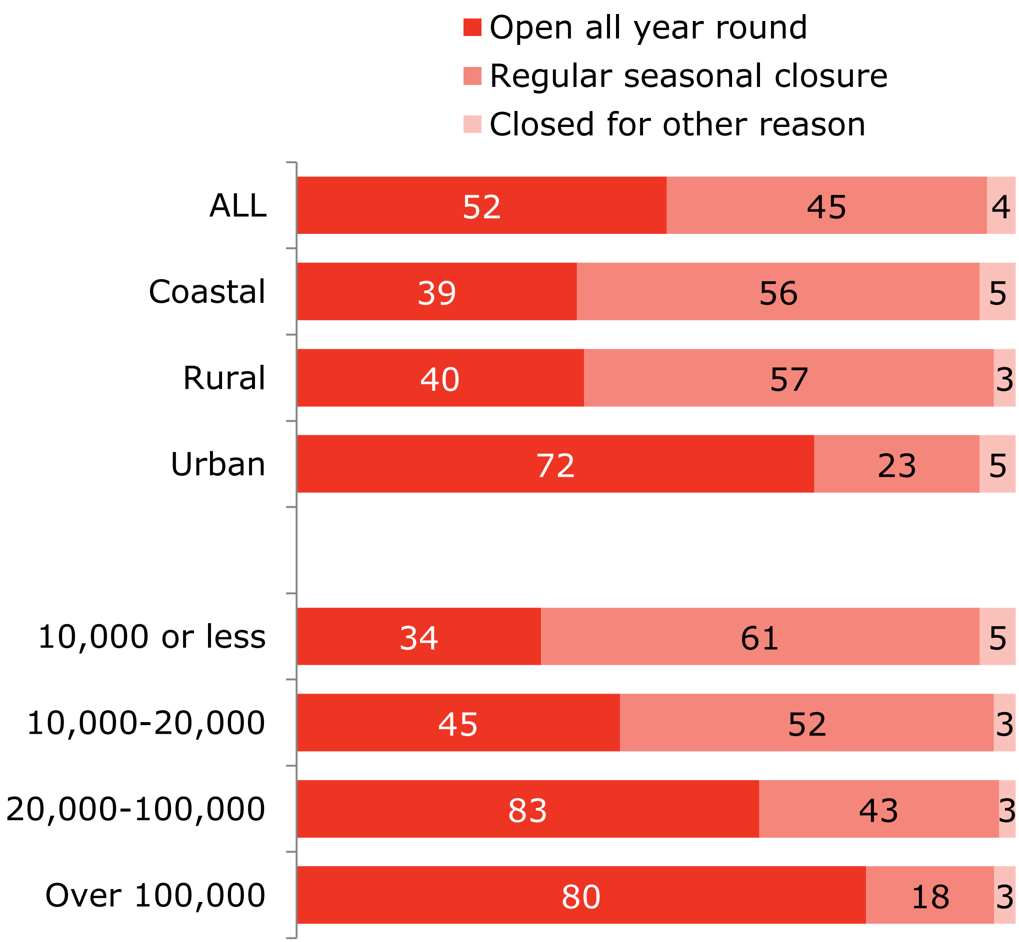
Steam and heritage railways and historic houses/ castles are the most seasonal.

4% of sites closed for other reasons (such as restoration) during the year.

Base: All attractions answering (1,411)

Underlined scores indicate 2014 % 'open all year round' significantly different from 2013

Attraction opening – by destination type & attraction size



Larger attractions (100,000 visitors or more), which tend to be based in urban areas are more likely to stay open year round.

Only a third of small attractions (defined as having 10,000 visitors a year or less) remain open for the whole year. These sites are less likely to attract sufficient visitors during off-peak periods to warrant staying open.

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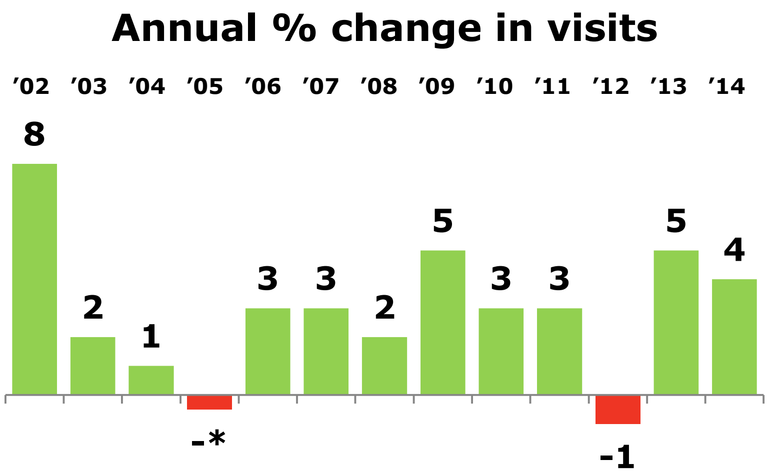
Base: All attractions answering (1,411)

Visitor admission trends

Visitor admission trends



Attractions reported a **4% annual increase** in total visits in 2014 (adults and children), consolidating the sector's return to growth following disruption around the Olympics and Paralympics.

This growth is driven by an increase in visits by overseas visitors, and to a lesser extent also local visits.

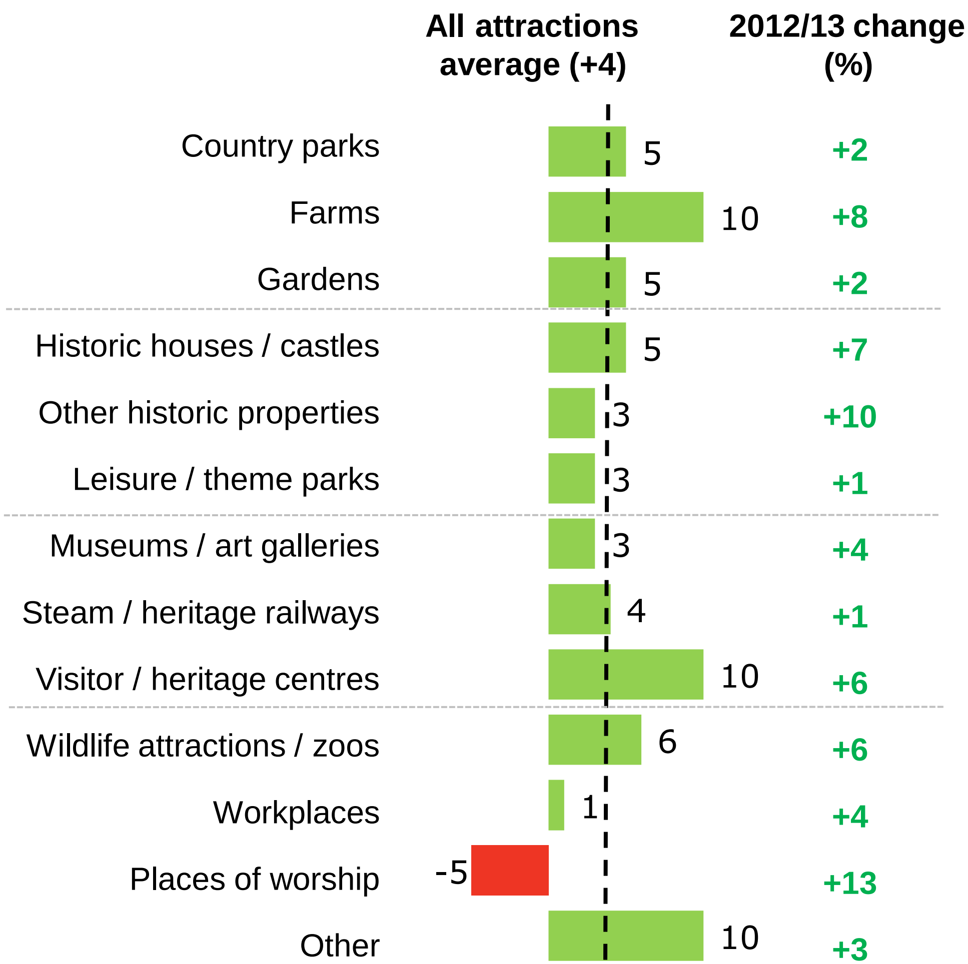
This is consistent with trends in inbound tourism, as the number of inbound visits to England in 2014 reached a record 29.8 million, an increase of 5% on 2013 (source: IPS).

The domestic picture was less rosy, with the number of overnight domestic holiday trips falling by 9% compared with 2013 (*source: GBTS),* and day visits down by 2% *(Source: DVS).*

VisitEngland

Base: All attractions providing visits data for current and previous year (1,491 in 2014)

Visitor admission trends 2014 – by attraction category



All sectors, aside from Places of worship, have experienced growth in visitor numbers.

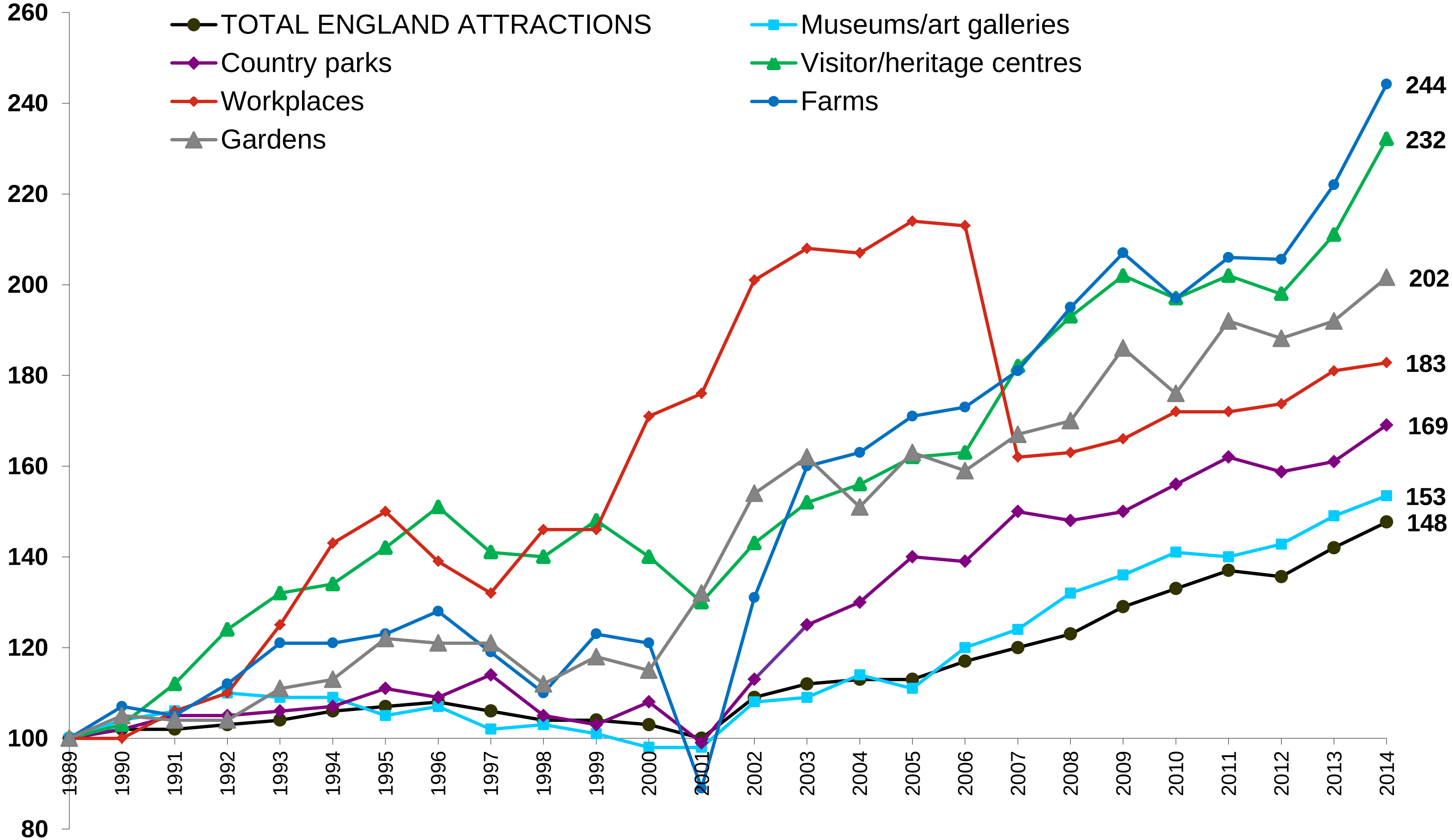
Places of worship grew visitor numbers substantially in 2013, and 2014 sees a return to 2012 levels.

The biggest growth was seen in Farm attractions and Visitor/ heritage centres, continuing their success from 2013.

With somewhat mixed weather in 2014 (largely warm and sunny, but with some torrential storms) there was little difference overall between categories dominated by outdoor attractions or those categories dominated by indoor attractions in terms of visitor number growth.

Base: All attractions providing visits data for both 2013 and 2014 (1,491)

Index of visits to attractions – sectors outperforming market



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Base: All attractions providing visits data for both 2012 and 2013 (1,478)

Index of visits to attractions – sectors outperforming market

<u>Index Calculation</u>

The charts presented on slides 14 and 16 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.

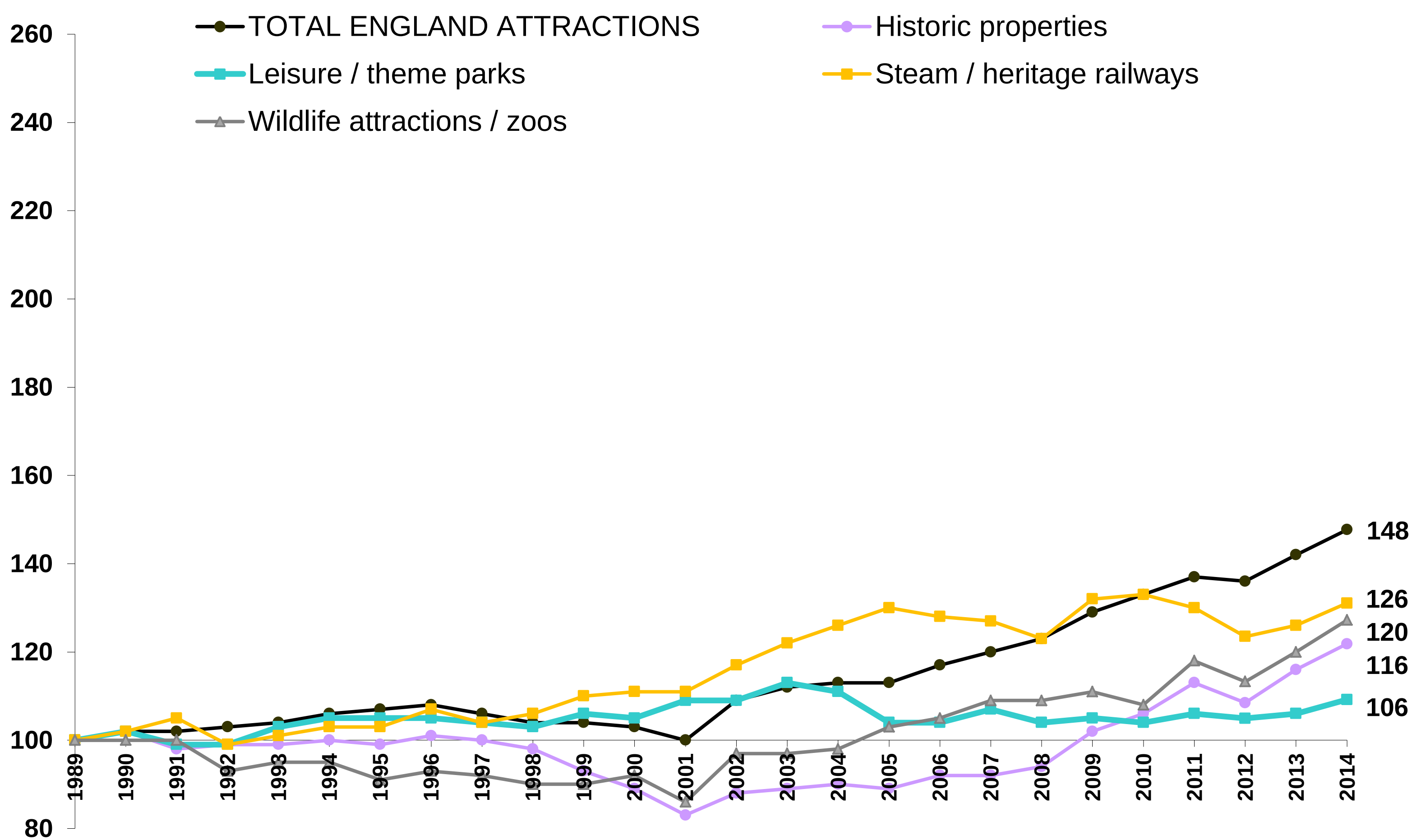
Operators are asked in each survey year to provide the number of visits for both the survey year and previous year. This enables the trend between any two years to be calculated based on the same attractions.

The chart shows the attraction categories which have shown above average annual visit increases since 1989**. Across England attractions as a whole, visits have increased 48% in that time.**

Farms have seen the greatest increase in visits, particularly in the last ten years, since the Foot and Mouth outbreak of 2001. Visitor / heritage centres have also seen very strong increases overall.

Visits to museums / art galleries overall are now over 50% higher than they were on the introduction of free entry to national museums in 2001. DCMS data on visits to former charging sponsored museums indicate that this increase has been primarily driven by visits to these museums. These figures state that visits to former charging sponsored London museums were up by +151% in the ten years since becoming free and those outside London by +148%.

Index of visits to attractions – sectors under performing against market



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Base: All attractions providing visits data for both 2012 and 2013 (1,478)

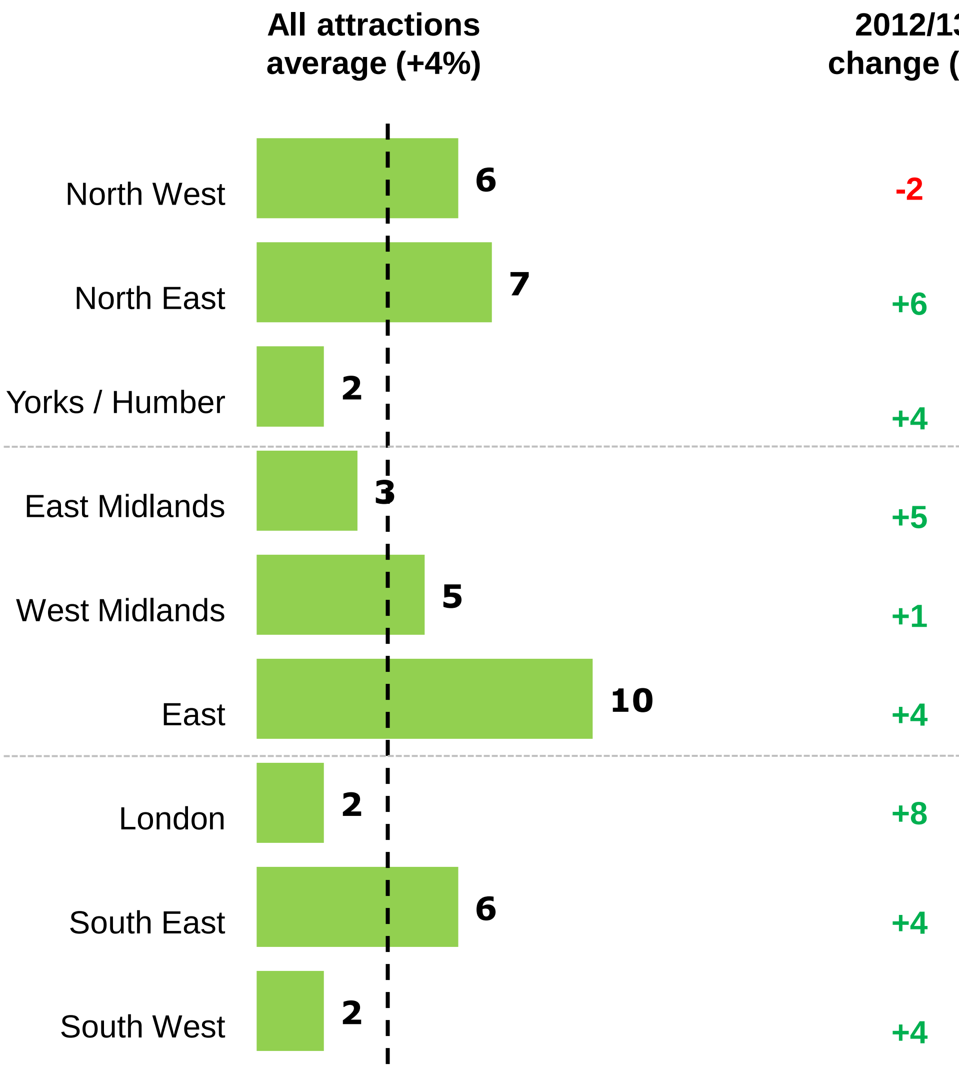
Index of visits to attractions – sectors under performing against market

Steam/ heritage railways, which had been performing above or in line with the industry average until 2010, saw two years of decline in 2011 and 2012 and a below average +1% increase in 2013. 2014 may herald the turning point, with visitor growth matching the sector average.

Both historic properties and wildlife attractions/ zoos reported slightly above average increases in visitor numbers this year (+5% and +6% respectively). Both have seen steady improvement since 2001, with historic properties particularly strong since 2008.

Visits to leisure / theme parks have rather stagnated over the past nine years, although it should be noted that attractions operated by Merlin Entertainments are not included in this survey.

Visitor admission trends 2014 - by region



2014 saw a change in fortunes of the regions. Growth in 2013 was most marked in London at +8%, but the city only managed to improve visitor numbers by 2% in 2014 – half the average growth of attractions across the whole of England.

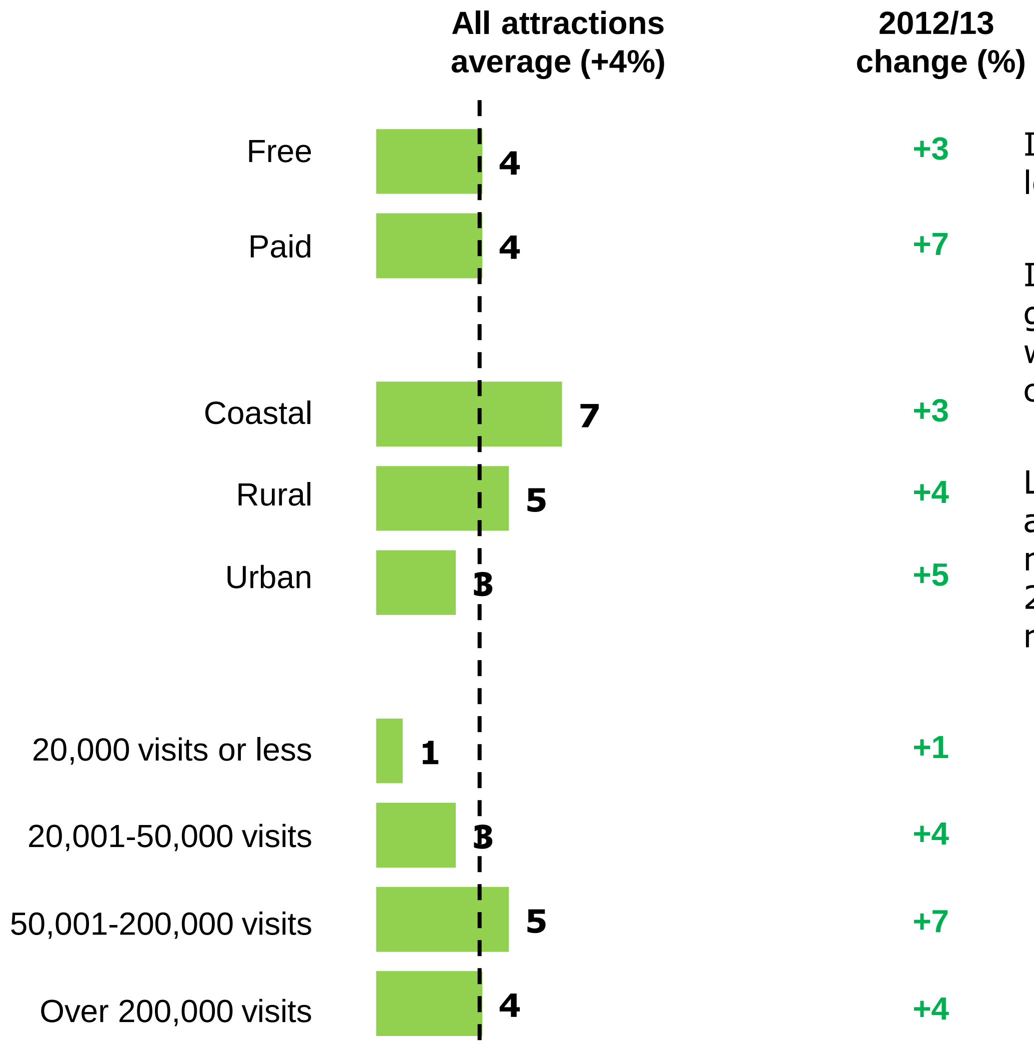
A record 17.4 million overnight visits to London were made by overseas residents in 2014, an increase of 0.6 million (3.5%) from 2013 (Source: IPS). However, bed nights spent in London were down by 11% amongst the domestic audience in 2014 (Source: GBTS), which has limited growth in the capital.

Instead, it was the East of England that saw the most significant growth, reflecting the positive change in bed nights by domestic tourists (+10%, Source: GBTS).

North East and West and the South East also showed above average growth.

Base: All attractions providing visits data for both 2013 and 2014 (1,491)

Visitor admission trends 2014 – by admission charge, geographic location and size



In 2014 visitor numbers grew at a consistent level between free and paid attractions.

In 2013 urban sites were most successful in growing visitor numbers, but the warmer weather in 2014 supported greater growth in coastal regions.

Larger attractions with 50,000+ visits per annum continue to outperform the rest of the market, while attractions with fewer than 20,000 visits continue to grow at the slowest rate.

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Base: All attractions providing visits data for both 2013 and 2014 (1,491)

Visitor admission trends 2014 – paid and free attractions

Free Attractions		2012 / 13 change (%)
ALL FREE ATTRACTIONS (564)	4	+3
Country parks (45)	5	+1
Farms (17)	11	+11
Gardens (7)	2	-21
Historic houses / castles (24)	13	-2
Other historic properties (30)	-1	+5
Leisure / theme parks (6)	3	-3
Museums / art galleries (282)	3	+4
Steam / heritage railways (1)	0	-3
Visitor / heritage centres (50)	8	+1
Wildlife attractions/zoos (27)	5	+2
Workplaces (14)	2	+5
Places of worship (54)	0	+12
Other (7)	12	+1

Paid Attractions		2012 / 13 change (%)
ALL PAID ATTRACTIONS (876)	3	+7
Country parks (7)	4	+19
Farms (35)	13	+6
Gardens (77)	6	+7
Historic houses / castles (301)	4	+7
Other historic properties (96)	5	+12
Leisure / theme parks (18)	3	+2
Museums / art galleries (200)	0	+5
Steam / heritage railways (33)	4	+2
Visitor / heritage centres (31)	12	+14
Wildlife attractions/zoos (44)	5	+7
Workplaces (12)	-1	+3
Places of worship (7)	-10	+13
Other (15)	4	+5

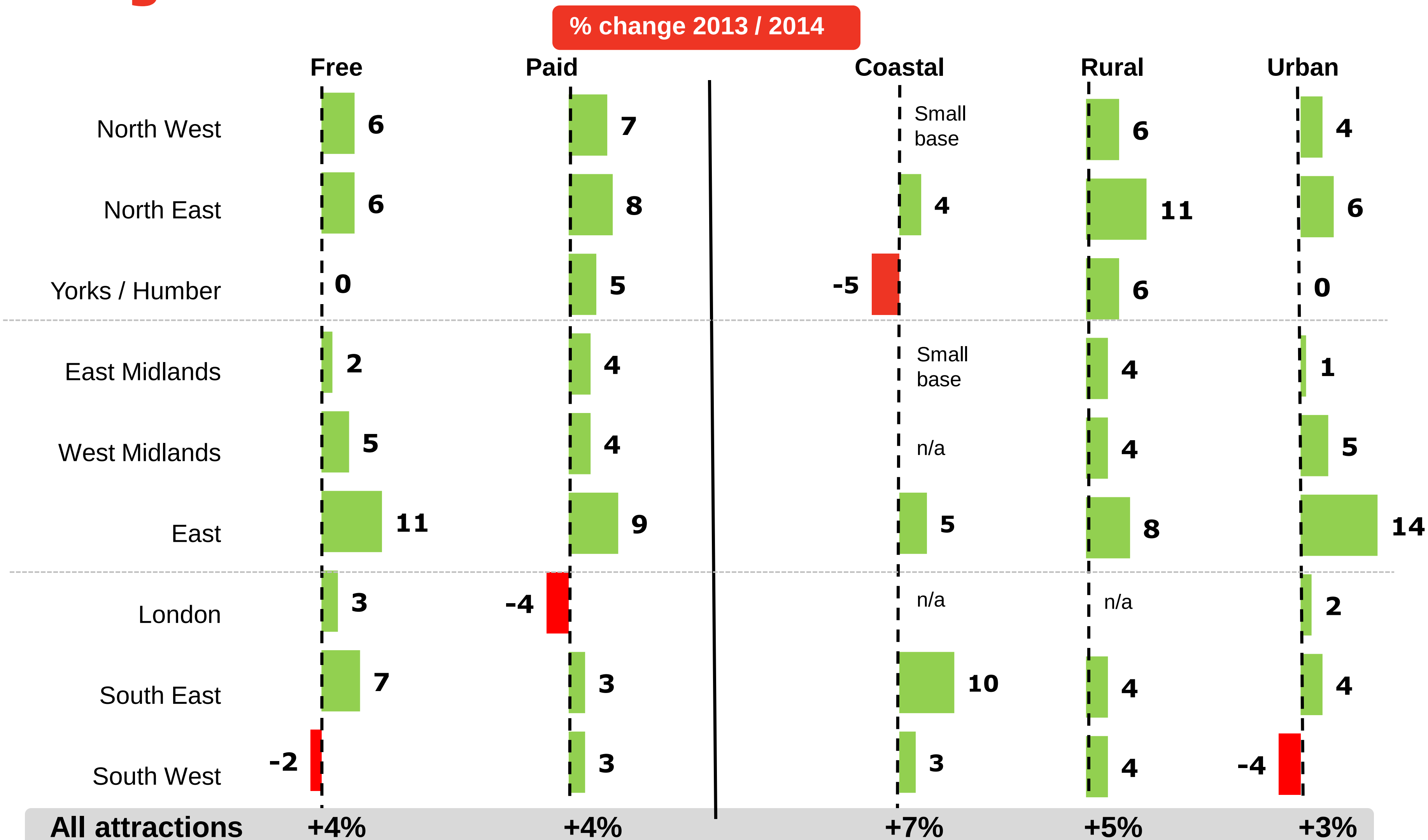
Paid attractions reported a +4% increase in visits for 2014. The year saw increases across most categories of paid attractions, with particular growth in Farms and Visitor/ heritage centres.

There was also an increase in visitor admissions to free attractions in 2014 (+4%). With half of free attractions being museums / art galleries, this category tends to define performance of free attractions overall. Visits to free museums / art galleries increased by +3% in 2014. Visits to free historic houses/ castles and visitor/ heritage centres saw the strongest growth in 2014.

VisitEngland

Base: All attractions providing visits data for both 2013 and 2014 (1, 491)
N.B. Figures in brackets represent sample sizes of attractions upon which data is based.

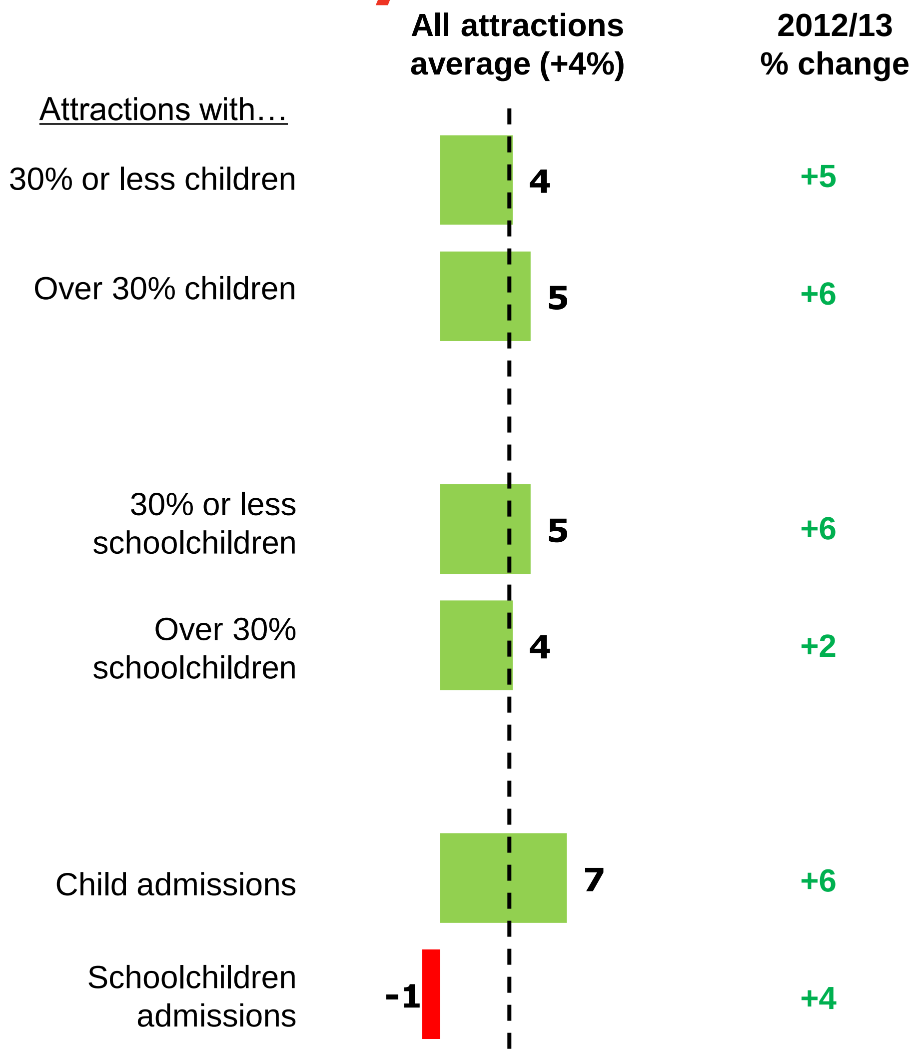
Visitor admission trends 2014 – other regional dimensions



VisitEngland

Base: All attractions providing visits data for both 2013 and 2014 (1,491)

Visitor admission trends 2014 – child visits summary



Family attractions performed slightly better than average in 2014. Child admissions to attractions increased more strongly than adult admissions, with +7% more children visiting attractions in 2014 than in 2013, versus +3% more adult admissions.

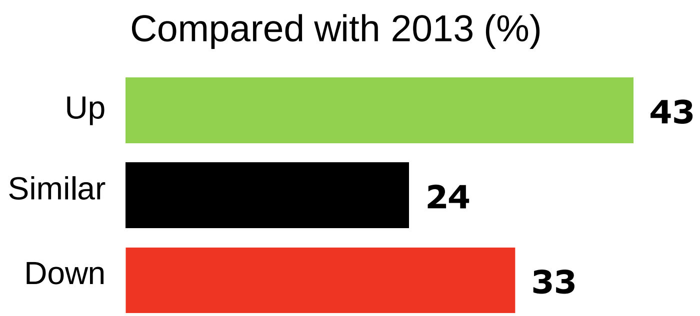
Attractions for which schoolchildren account for over 30% of their visits performed in line with the average (+4%) in contrast with the previous two years where growth of school focused attractions had been limited or negative (growth of +2% in 2013 and -16% in 2012). This may be associated with the decline in schoolchildren admissions (-1%).

Base: All attractions providing visits data for both 2013 and 2014 (1,491)

Visitor admission trends 2014 – by visitor origin

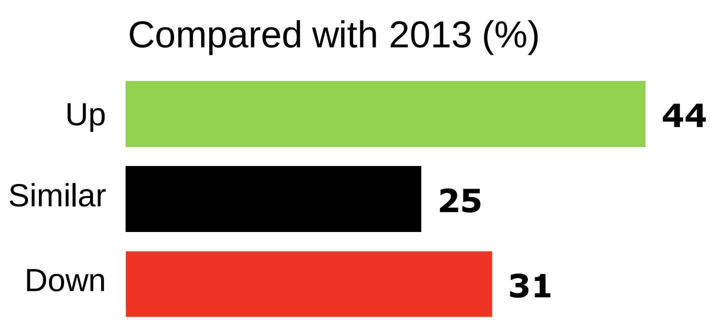
Overseas visitors

+8%
in visits



Local / day trippers

+4%
in visits



Across the attractions sector, overseas visits were up by 8% in 2014, following growth of 10% for the previous two years. However, unlike in 2012 when this increase was driven almost entirely by London, the increases in 2013 and 2014 were much more likely to be shared around the regions.

Only the South West saw a decline in overseas visitor admissions (see page 24).

Attractions reported local visitors within day trip distance up by +4% in 2014. This growth has slowed since 2013 (+8%), but is a positive result, given a decline in day visits (-2% in 2014, *Source: DVS).*

Base: All attractions responding (c.1,280)

Visitor admission trends 2014 – overseas visitors by attraction category and region

Attraction Category: overseas visitors

% down		% up	2013/14 % change
-12	Country parks	41	↑ 9%
-12	Farms	52	↑ 22%
-14	Gardens	51	↑ 13%
-34	Historic houses / castles	41	↑ 2%
-26	Other historic properties	44	↑ 12%
-8	Leisure / theme parks	29	↑ 17%
-27	Museums / art galleries	42	↑ 10%
-14	Steam / heritage railways	43	↓ 30%
-21	Visitor / heritage centres	43	↑ 4%
-11	Wildlife attractions / zoos	47	↑ 34%
-19	Workplaces	30	↑ 17%
-26	Places of worship	40	↓ 10%
-14	Other	41	↑ 26%

Overseas visits increased to all types of attractions apart from 'Steam/ heritage railways' and 'Places of worship' in 2014.

Region: overseas visitors

% down		% up	2013/14 % change
-20	North West	47	↑ 2%
-22	North East	55	↑ 22%
-22	Yorks / Humber	51	↑ 9%
-22	East Midlands	39	↑ 22%
-25	West Midlands	43	↑ 4%
-20	East	40	↑ 38%
-28	London	45	↑ 9%
-29	South East	42	↑ 10%
-27	South West	35	↓ 6%

Continuing the trend from 2013, overseas visitors were venturing further across the country in 2014. The North East, East Midlands and East of England saw particularly strong increases in overseas visits to their attractions.

The South West saw another drop in overseas visitors this year, although the decline was less marked than in 2013 (-6% vs. -18%).

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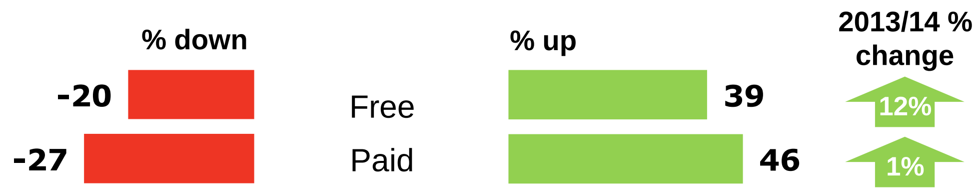
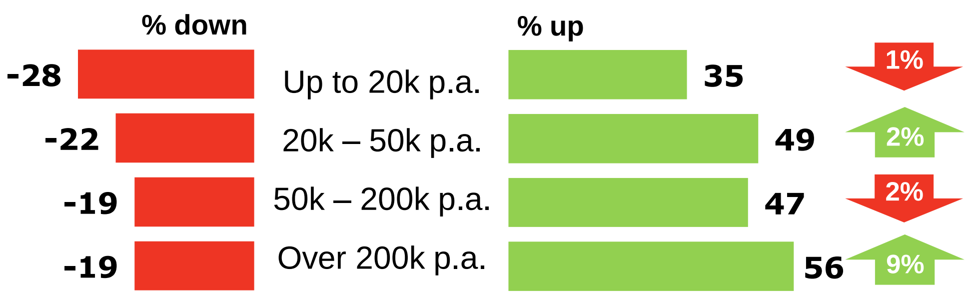
Base: All attractions responding (c.790)

Visitor admission trends 2014 – overseas visitors by size and admission charge

Admission Charge: overseas visitors



Size: overseas visitors



The increase in overseas visitors was driven primarily by free admission attractions, as was the case in the previous two years.

Large government funded attractions, with over 200,000 visitors a year, saw the biggest increases in visitor numbers. This is in contrast to 2013, when smaller attractions were more successful in growing international visits.

Base: All attractions responding (c.790)

Visitor admission trends 2014 – local / day trip visitors by attraction category and region

Attraction Category: local visitors

	% down	% up	2013/14 % change
Country parks	-13	36	↑ 7%
Farms	-11	49	↑ 7%
Gardens	-15	49	↑ 9%
Historic houses / castles	-34	43	↑ 5%
Other historic properties	-27	47	↑ 9%
Leisure / theme parks	-15	35	↑ 5%
Museums / art galleries	-28	44	↓ 1%
Steam / heritage railways	-18	44	↑ 1%
Visitor / heritage centres	-19	42	↑ 9%
Wildlife attractions / zoos	-9	55	↑ 9%
Workplaces	-18	32	↑ 1%
Places of worship	-25	37	↓ 1%
Other	-17	48	↑ 10%

Region: local visitors

	% down	% up	2013/14 % change
North West	-22	50	↑ 3%
North East	-24	54	↑ 6%
Yorks / Humber	-21	48	↑ 3%
East Midlands	-25	43	0%
West Midlands	-23	47	↑ 4%
East	-20	45	↑ 13%
London	-30	45	↑ 4%
South East	-30	41	↑ 4%
South West	-25	38	↑ 2%

Other than Museums/ art galleries, and Places of worship which both showed declines of 1%, all other attraction categories reported growth in the local market in 2014.

Local visitor numbers held steady or increased across the whole of the UK, with particular growth in the East of England.

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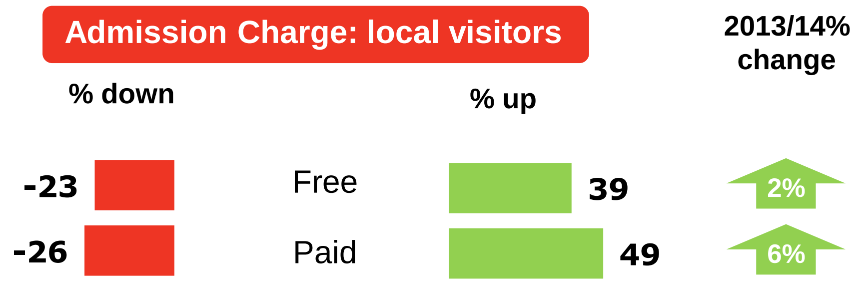
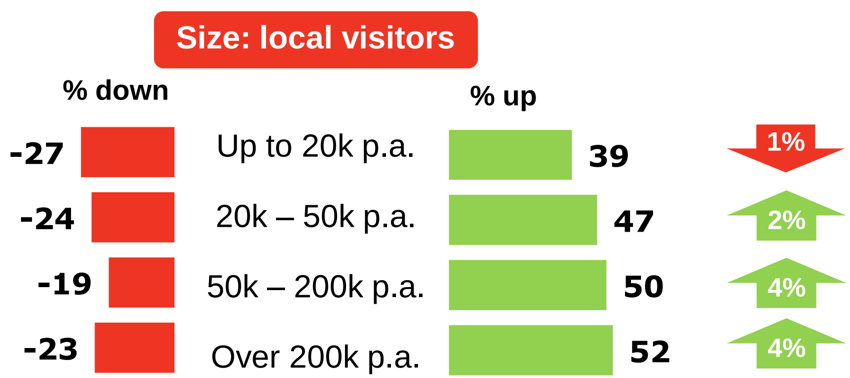
Base: All attractions responding (c.800)

Visitor admission trends 2014 – local / day trip visitors by size and admission charge





Local visitors appear to have driven the increase in visits to paid admission attractions in 2014. Local visitors to these attractions increased by +6% in 2014 compared with an overall +4% increase in visits to paid attractions and marginal growth of +1% amongst overseas visitors.

The smallest attractions experienced a slight decline (-1%) in local visitors.

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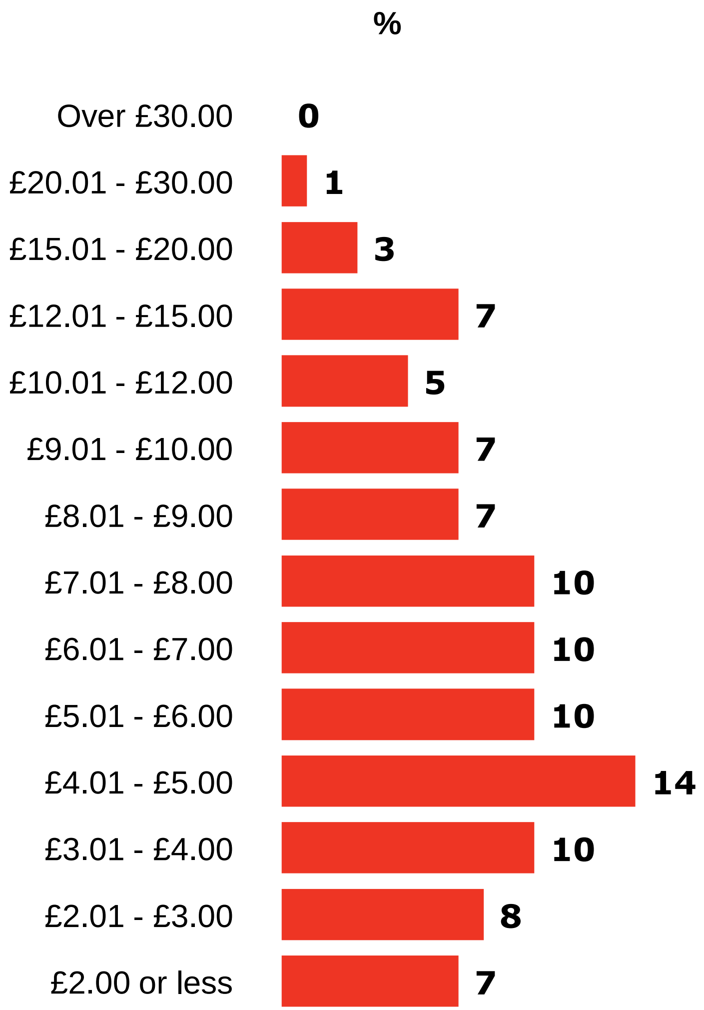
Base: All attractions responding (c.1,260)

Admission charge and revenue trends

Adult admission charges 2014



39% of attractions charging admission, charge £5 or less for entry – this has been slowly declining over the last couple of years (43% in 2012 and 41% in 2013). 16% charge over £10.

The average entry charge stands at £7.24 in 2014.

The average child admission charge amongst those sites charging is £4.69. A quarter of charging sites charge over £5 for child entry, with 5% charging over £10.00.

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Base: Attractions charging for admission in 2014 (919)

Adult admission charge trends 2014 – by attraction category

	% average increase in adult charge versus 2013	Average 2014 charge	2012/13 change (%)
ALL ATTRACTIONS	4	£7.24	+4
Country parks	4	£6.67	+3
Farms	5	£8.11	-5
Gardens	3	£6.90	+4
Historic houses / castles	3	£7.71	+4
Other historic properties	5	£5.96	+7
Leisure / theme parks	5	£15.66	+6
Museums / art galleries	6	£5.43	+5
Steam / heritage railways	2	£9.31	+2
Visitor / heritage centres	5	£5.93	+5
Wildlife attractions / zoos	3	£9.83	+4
Workplaces	5	£6.29	+3
Places of worship	3	£8.56	+18
Other	4	£9.48	+8

Adult and child entrance fees both increased in 2014, with fairly consistent increases across categories.

The average increase in **adult admission fees** was 4% – consistent with increases during the previous years, with increases of 4% (2013), 4% (2012), 5% (2011), 5% (2010) and 4% (2009). This remains significantly above the rate of inflation.

Average **child admission charges** increased by more - 7% on average – which is a higher increase than in previous years (4% in 2013, 3% in 2012).

Leisure/ theme parks (£15.66), wildlife attractions/ zoos (£9.83) and steam/ heritage railways (£9.31) have the highest average admission prices.

Country parks charging asked for £6.67 on average for adult entry in 2014. Go Ape (which charges significantly more than this per entry) did not provide data this year, which explains the apparent drop in price point for this category compared with 2013, when the average price for entry was £25.13.

Base: Attractions providing admission charge data for both 2013 and 2014 (919)

Adult admission charge trends 2014 – by region

% change in adult admission charge

	All attractions average (4%)	Average 2014 charge	2012/13 change (%)
North West	4	£7.24	+6
North East	4	£6.02	+5
Yorks / Humber	5	£6.75	+4
East Midlands	3	£6.20	+4
West Midlands	3	£7.23	+5
East	5	£7.13	+5
London	3	£8.83	+4
South East	4	£7.64	+4
South West	4	£7.51	+3

London charging attractions remain the most expensive (at £8.83 on average), but only marginally, with most areas (except the North East, East Midlands and Yorkshire) charging over £7 for adult entry.

Attractions in the East have been increasing their prices most rapidly over the last couple of years (+5% in 2014, +5% in 2013 and +6% in 2012).

Base: All attractions providing admission charge data for both 2013 and 2014 (919)

Adult admission charge trends 2014 – by attraction size

% change in adult admission charge

Annual visits	All attractions average (4%)	Average 2014 charge	2012/13 change (%)
20,000 or less p.a.	4	£5.18	+4
20,001 – 50,000 p.a.	4	£6.84	+2
50,001 – 100,000 p.a.	3	£8.43	+5
100,001 – 200,000 p.a.	3	£10.79	+6
Over 200,000 p.a.	5	£12.45	+7

Site admission charges increase in line with the number of visitors attracted, with those bringing in more than 200,000 visitors a year charging over £12 on average, vs. an average entrance fee of a little of £5 for attractions with 20,000 visitors or fewer.

There is little variation in entrance price inflation by attraction size, although the largest sites (those with over 200,000 visitors) continue to be more bullish, increasing adult charges by +5% in 2014.

VisitEngland™

Base: All attractions providing admission charge data for both 2013 and 2014 (919)

Adult admission charge trends 2014 – by geographic location and child admissions

% change in adult admission charge

	All attractions average (4%)	Average 2013 charge	2012/13 change (%)
Coastal	5	£6.48	+4
Rural	4	£7.44	+4
Urban	4	£7.16	+5
Attractions with…			
30% or less child visits	5	£6.56	+4
Over 30% child visits	4	£8.32	+4
30% or less overseas visits	4	£7.04	+4
Over 30% overseas visits	4	£9.24	+5

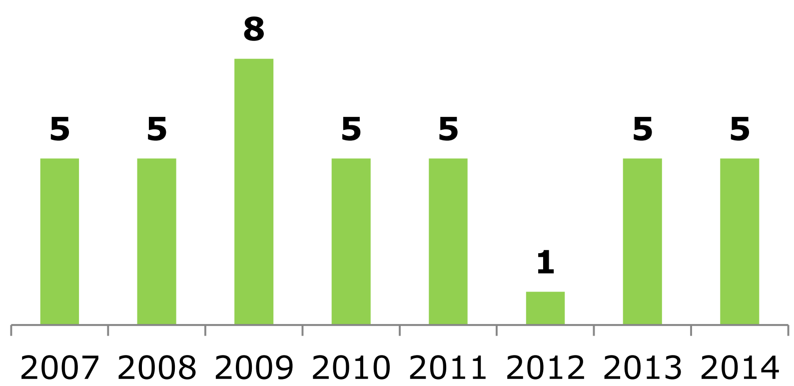
Change in admission pricing is consistent across the different types of areas, and between sites attracting families/ non-family and domestic/ overseas audiences.

Sites with a high proportion of overseas visitors and children tend to set their entrance fees higher, with coastal attractions charging the least.

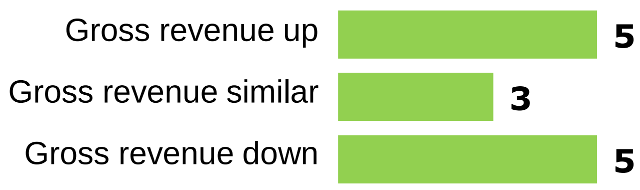
Base: All attractions providing admission charge data for both 2013 and 2014 (919)

Gross revenue trend

% change in gross revenue



% change adult admission charges



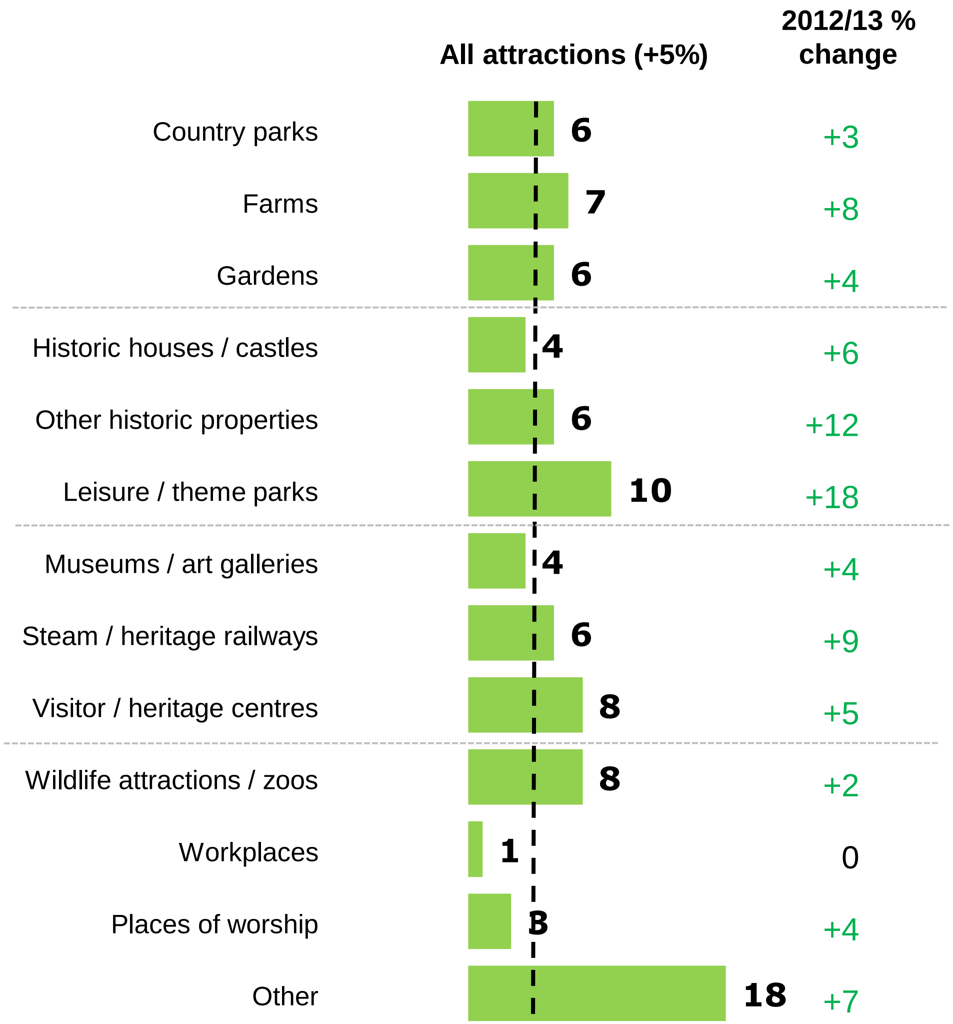
Gross revenue at attractions was up by +5% in 2014, following the general trend over the last eight years (with exceptions in 2009 and 2012).

Almost half (48%) of attractions reported an increase in gross revenue in 2014 compared with only 16% reporting a decrease.

In the past, revenue has been correlated with change in adult admission prices, with larger price increases generating more revenue. However, in 2014 we didn't find this to be the case. With the high, above inflation, price increases, it seems that some attractions may have increased their prices beyond the optimal level.

Base: All attractions responding (1,167)

Gross revenue trend 2014 – by attraction category



All categories managed to increase gross revenue in 2014.

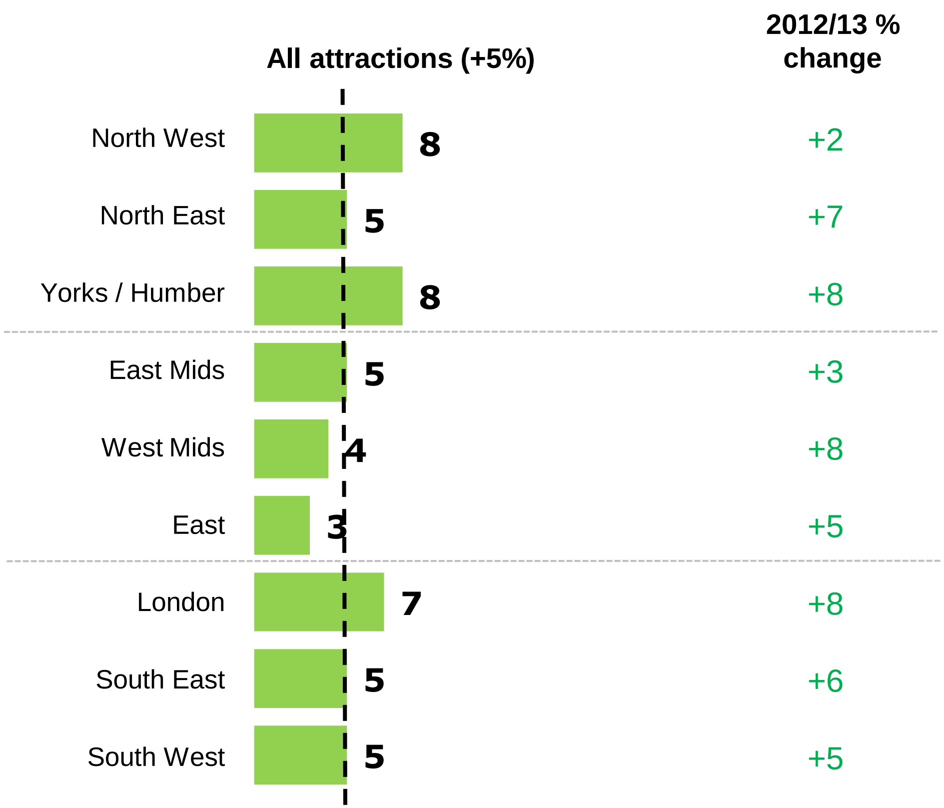
Once again, growth was particularly strong for leisure / theme parks – perhaps seeing growth in secondary spend, accommodation, annual passes / memberships etc.

Workplaces managed to increase revenue by 1% this year, having been static in 2013.

VisitEngland

Base: All attractions responding (1,166)

Gross revenue trend 2014 – by region



Attractions in the North West, Yorkshire & Humberside and London were the most effective at increasing revenue in 2014.

In the North West, revenue increases were driven by the increase in visitor numbers.

Yorkshire attractions reported below average increases in visitors, so their revenue growth is likely to have come from the above average increase in entrance fees.

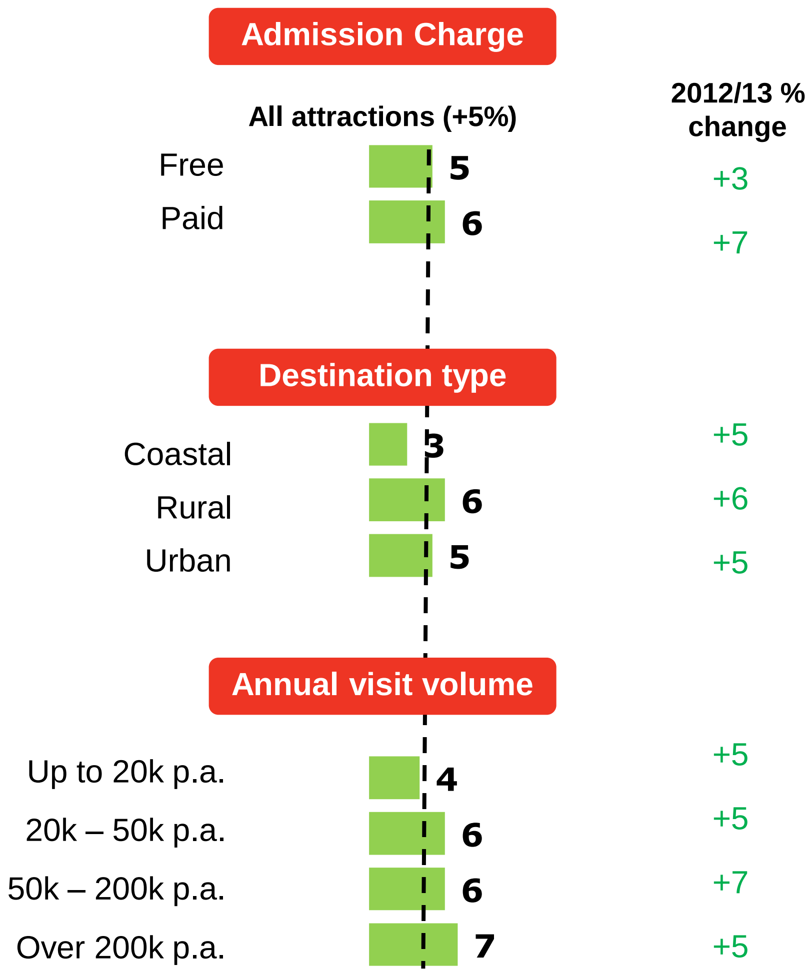
London attractions reported below average visitor numbers and price increases, so we can only assume that revenue growth in this region has come through secondary spend and operational efficiencies.

Despite growth in visitor numbers and above average increases in admission charges, sites in the East of England report below average revenue gains, so this may be associated with expenditure on marketing or improvements to the offer.

VisitEngland

Base: All attractions responding (1,166)

Gross revenue trend 2014 – by admission charge, destination type and visit volume



Revenues grew in 2014 across all sizes of category, destination types and free versus charging attractions.

Revenue growth was more significant at large attractions with over 200,000 visitors, with slightly below average increases at small attractions (with fewer than 20,000 visitors).

Coastal attractions (a fifth of which are found in the East) reported the lowest revenue gains, despite above average increases in visitor numbers and adult admission fees.

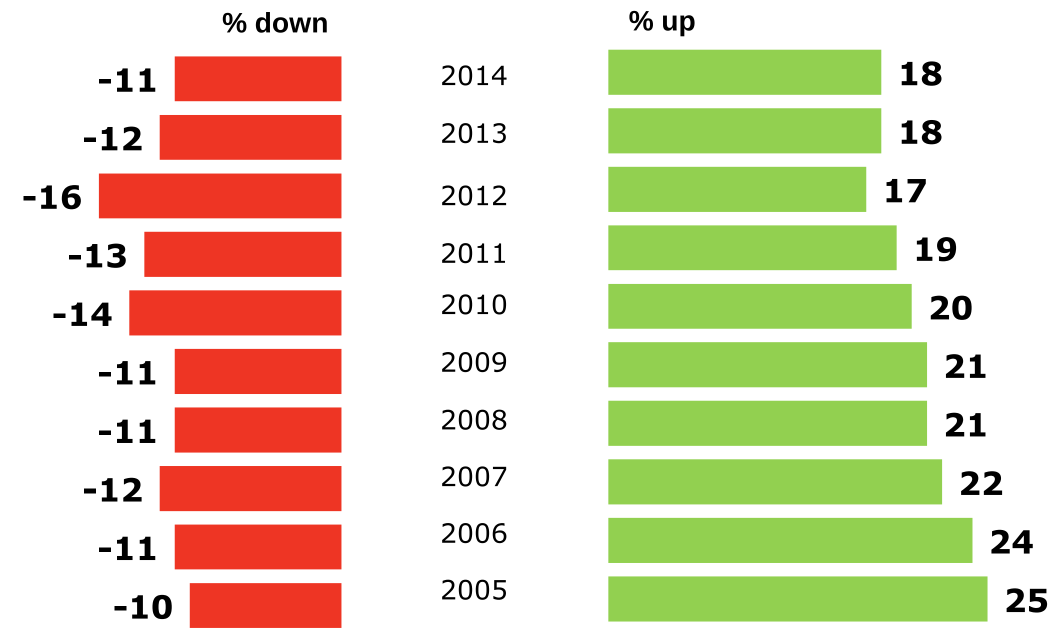
VisitEngland

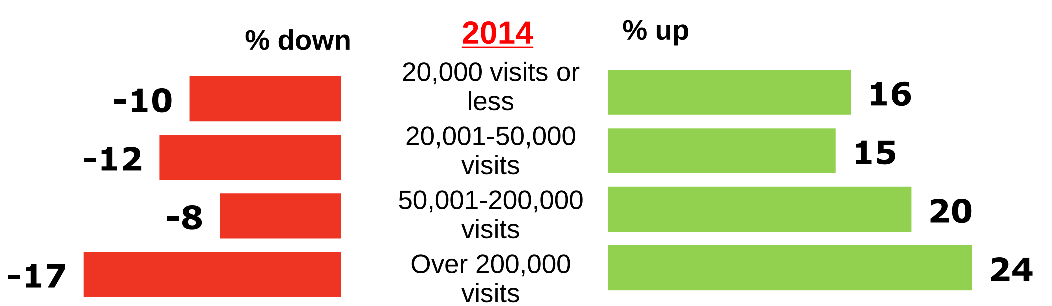
Base: All attractions responding (1,166)

VisitEngland

Marketing and communications trends

Marketing expenditure trend





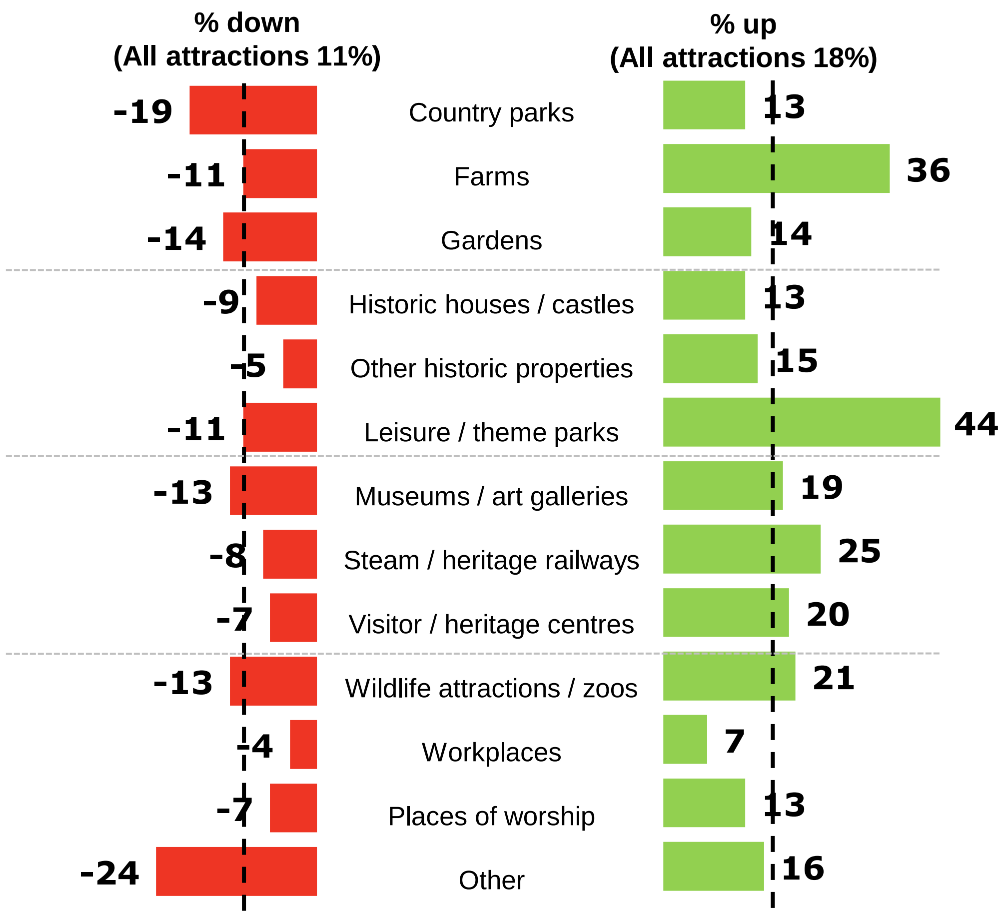
Between 2005 and 2012, the proportion of attractions reporting increases in marketing expenditure had been in gradual decline, with nearly as many attractions decreasing their marketing investment as there are increasing.

This decline seems to have halted for now, with more sites still reporting an increase in marketing expenditure to those reporting a decline.

Marketing expenditure of large attractions (with over 200,000 visitors) has been polarised in 2014 – this category is the most likely to have increased marketing expenditure, and also the most likely to have spent less on marketing in 2014. It is possible that this may reflect a shift in marketing activity at some attractions, with more emphasis placed on cheaper digital marketing platforms.

Base: Attractions answering marketing question (1,343)

Marketing expenditure trends 2014 –by attraction category



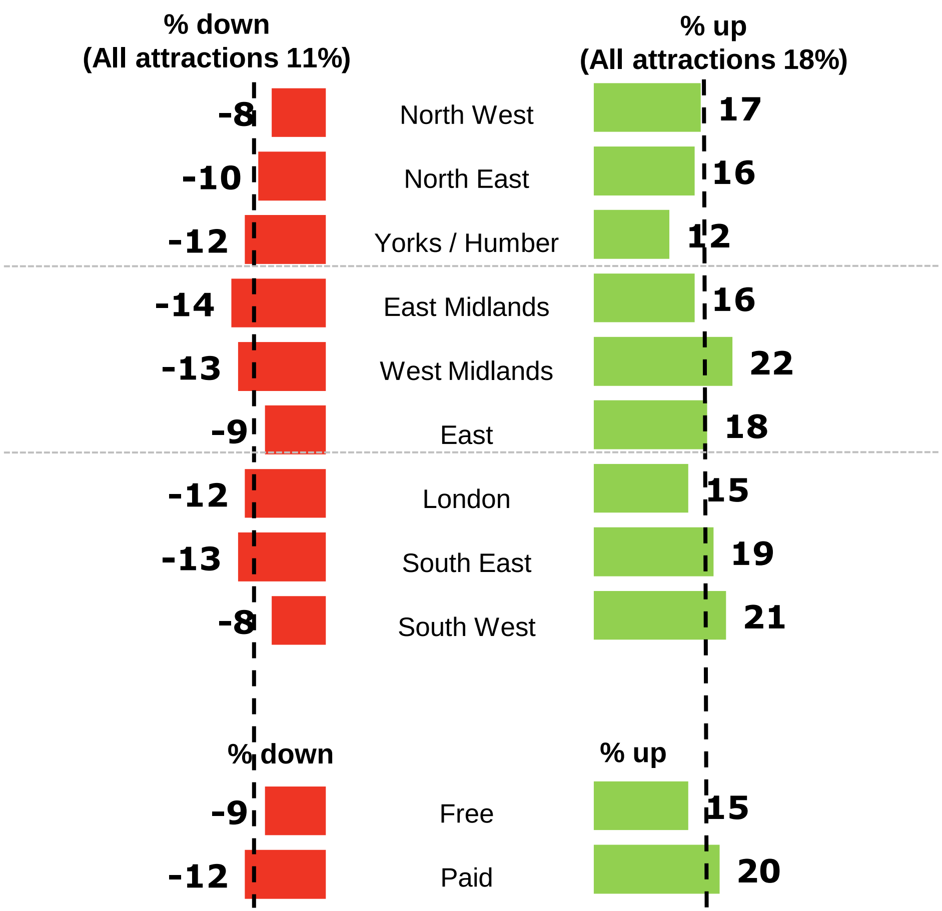
Leisure/ theme parks are the most likely to have increased their marketing spend, with approaching half of these attractions doing so and only one in ten reducing spend. Although this category experienced below average growth in visitor numbers, it was able to support slightly above average admissions price increases and were the most successful category at growing revenue in 2014.

Over a third of Farms increased their marketing expenditure in 2014, which is likely to have supported their growth in visitor numbers and associated revenue.

Only Country parks reported a net reduction in marketing spend (where the proportion decreasing exceeded the proportion increasing marketing spend).

Base: Attractions answering marketing question (1,343)

Marketing expenditure trends 2014 – by region and admission charge



As reported in recent years, paid attractions (which are more likely to be the larger attractions) continue to be more likely to increase their marketing expenditure than free attractions. However, they are also more likely to have reduced marketing spending.

Increases in marketing spend appear to have been most likely among attractions in the South West with 21% seeing an increase and only 8% reporting a decrease in marketing spend.

VisitEngland

Base: Attractions answering marketing question (1,353)

Impact of marketing expenditure - summary

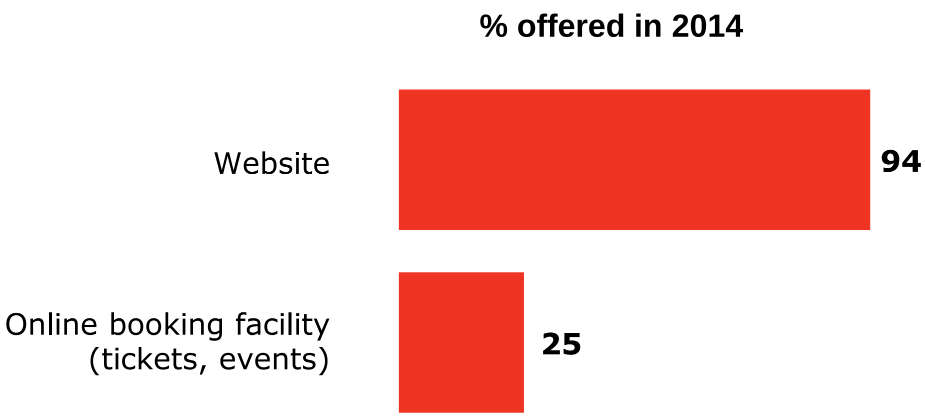
	Marketing spend in 2014	
2013 / 14 change in…	**Up**	**Down**
Total visitor admissions	+7%	+2%
Local visits	+9%	+3%
Overseas visits	+5%	-1%
Gross revenue	+13%	-1%

As in previous years, attractions increasing their marketing expenditure in 2014 were more likely to report increases in visitor numbers and gross revenue.

Visitor admissions increased by +7% among those increasing their marketing spend compared with only +2% amongst those who cut back on marketing, with this pattern seen in both local and overseas visits.

The difference in gross revenue between sites expanding or reducing their marketing is even more marked; it grew by +13% amongst those increasing their marketing spend but fell by -1% amongst attractions reducing their marketing spend.

Website and online booking facilities



% offered	Website	Online Booking
Under 10k visits p.a.	88	10
10k - 20k visits p.a.	98	15
20k - 100k visits p.a.	97	27
100k - 200k visits p.a.	100	36
Over 200k visits p.a.	98	56
Free attractions	92	21
Paid attractions	96	28

Almost all attractions (94%) now have a website. Only the very smallest attractions with less than 10,000 visits per annum are significantly less likely to have a website (88%). Free attractions are also still less likely to offer a website.

In category terms, only workplaces have less than 90% of their attractions offering a website (see page 45).

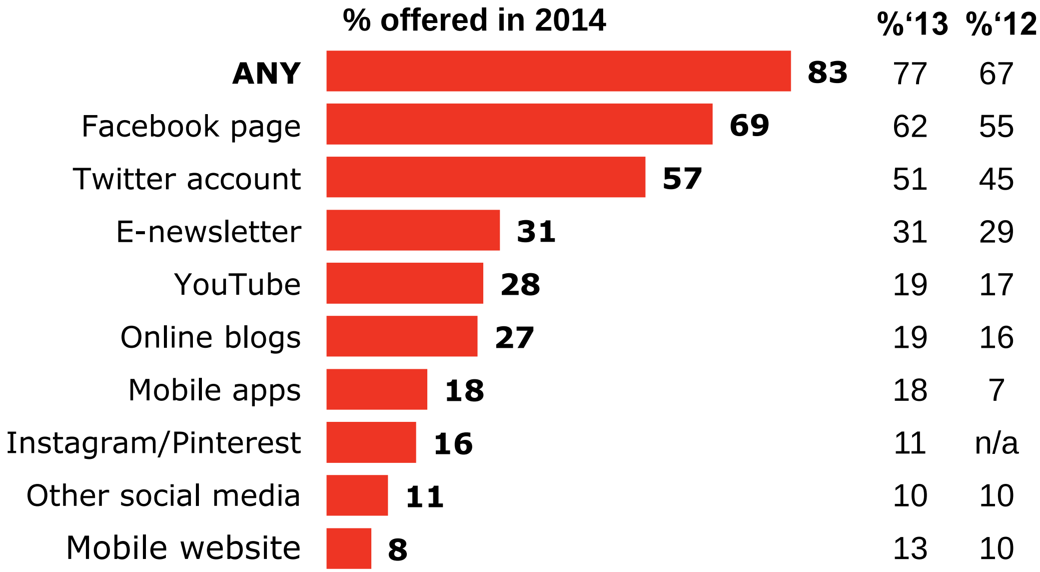
A quarter of sites offered an online booking facility for tickets / events in 2014, up from 21% in 2013. This varies significantly by attraction size, with over half (56%) of attractions reporting visits of over 200,000 per annum offering this facility compared with just 10% of those with visits of less than 10,000 per annum.

Online booking is most likely to be offered within the leisure / theme park and steam / heritage railway sectors (see page 45).

VisitEngland

Base: All answering digital communications question (1,409)

Other digital communications offered



% offered	Number of visits p.a		
	20k or less	20k-100k	Over 100k
ANY	**72**	**92**	**94**
Facebook page	54	79	89
Twitter account	37	69	83
E-newsletter	20	34	54
YouTube	15	33	46
Online blogs	16	32	43
Mobile apps	12	21	27
Instagram/Pinterest	6	18	34
Other social media	5	12	25
Mobile website	3	8	18

Use of digital communications (other than a website) continued to increase in 2014, albeit at a slower pace, with 83% of attractions now using at least one form of digital communications.

Facebook and Twitter remain the most popular platforms and are commonly used, even amongst smaller attractions. However, use of YouTube and Online blogs have increased the most, driven by attractions with less than 100,000 visitors.

Provision of mobile apps more than doubled between 2012 and 2013, but developments in this area seem to have halted in 2014.

VisitEngland

Base: All answering digital communications question (1,409)

Digital communications offered in 2014 – by attraction category

% offering	Country Parks	Farms	Gardens	Historic houses / castles	Other historic properties	Leisure / theme parks	Museums / art galleries	Steam / heritage railways	Visitor / heritage centres	Wildlife / zoos	Work-places	Places of Worship	Other
ANY	**85**	**95**	**79**	**89**	**77**	**96**	**82**	**89**	**81**	**89**	**52**	**67**	**93**
Facebook	77	91	74	62	46	82	74	89	67	83	41	58	85
Twitter account	50	64	61	56	35	79	62	62	52	69	37	47	59
E-newsletter	19	48	32	25	19	57	37	43	27	37	26	30	11
YouTube	4	30	12	43	42	43	24	38	10	31	7	13	30
Online blogs	6	27	23	49	39	21	23	24	6	29	4	8	11
Mobile apps	6	2	13	42	37	25	9	8	14	11	0	5	7
Instagram/ Pinterest	0	16	16	14	10	29	22	16	10	16	15	5	19
Other social media	2	11	11	9	6	21	16	8	10	19	7	0	11
Mobile website	6	9	9	6	6	21	8	16	5	13	4	3	19
WEBSITE	**94**	**95**	**93**	**93**	**93**	**96**	**94**	**97**	**91**	**97**	**85**	**100**	**96**
ONLINE BOOKING	**17**	**38**	**15**	**21**	**18**	**68**	**24**	**59**	**19**	**30**	**19**	**23**	**33**

VisitEngland

Base: All answering digital communications question (1,409)

Impact of digital communications - summary

	Offer any digital communications (exc. website / online booking)?	
2013 / 14 change in…	**Yes**	**No**
Total visitor admissions	+4%	+3%
Children admissions	+7%	-7%
Local visits	+4%	+4%
Overseas visits	+8%	+8%
Gross revenue	+6%	+2%

Those attractions offering some form of digital communications platform (excluding just a website or online booking facility) in 2014 reported stronger increases in overall gross revenue and in child admissions.

Gross revenue increased by +6% amongst those offering digital communications, but by only +2% amongst sites not offering.

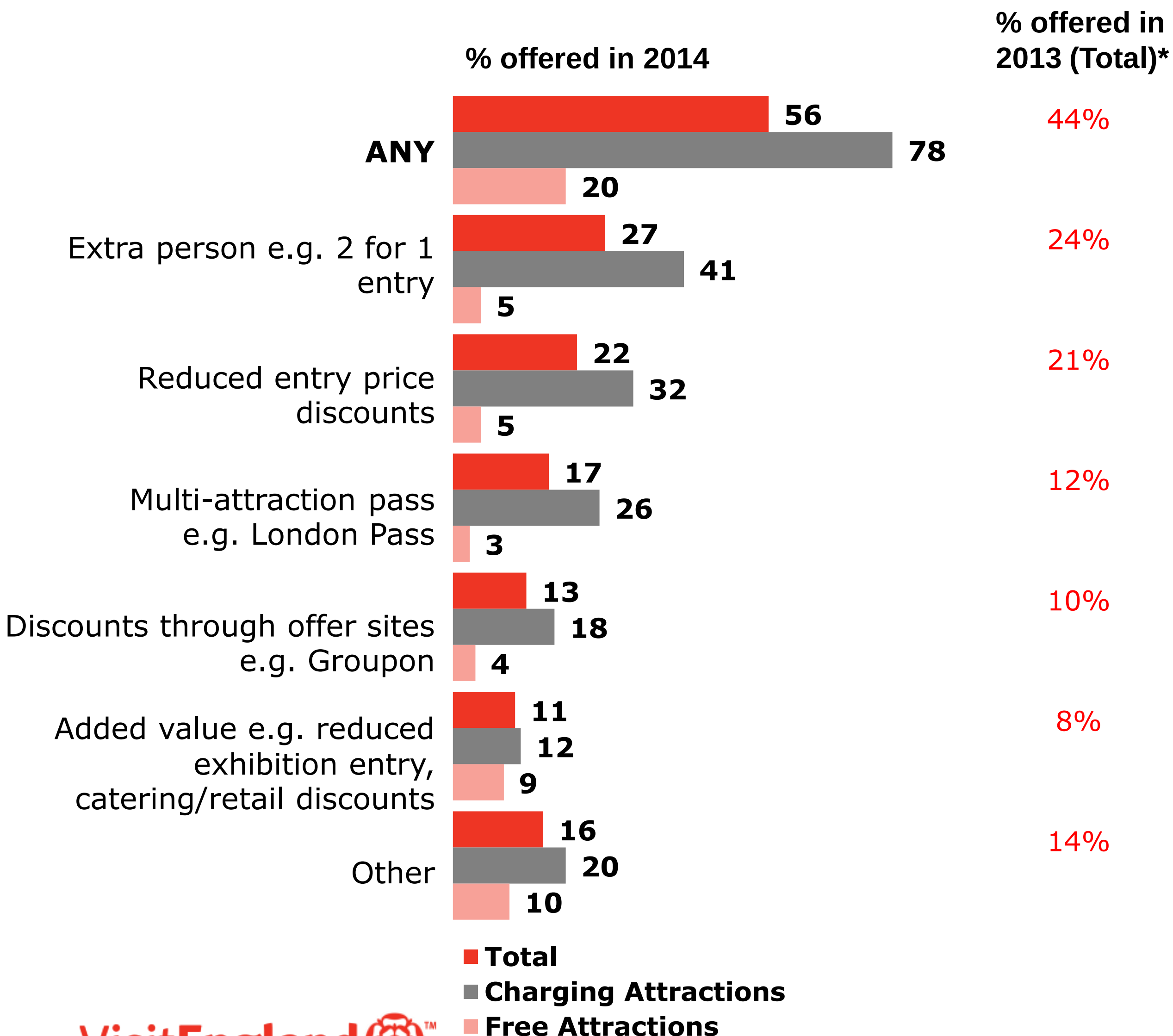
There was no impact of offering digital communications on total admissions; nor was there any impact on local or overseas visitors.

However, digital communications are clearly important to the success of family attractions. The impact on child admissions was significant – increasing by +7% among those offering digital communications and declining by -7% among those who did not.

VisitEngland

Deals and Discounts

Deals or discounts offered in 2014



Reliance on deals and discounts appears to be increasing with over half (56%) of attractions offering some form of deal or discount in 2014, up from 44% in 2013. This increases to 78% among charged admission attractions.

20% of free attractions claim to offer deals or discounts. These are often attractions which have some form of paid entry occasionally (perhaps temporary exhibitions) and those which offer discounts on secondary spend areas such as catering or retail.

Among attractions charging for admission, offers primarily consisted of extra person discounts (41%) or reduced entry price discounts (32%).

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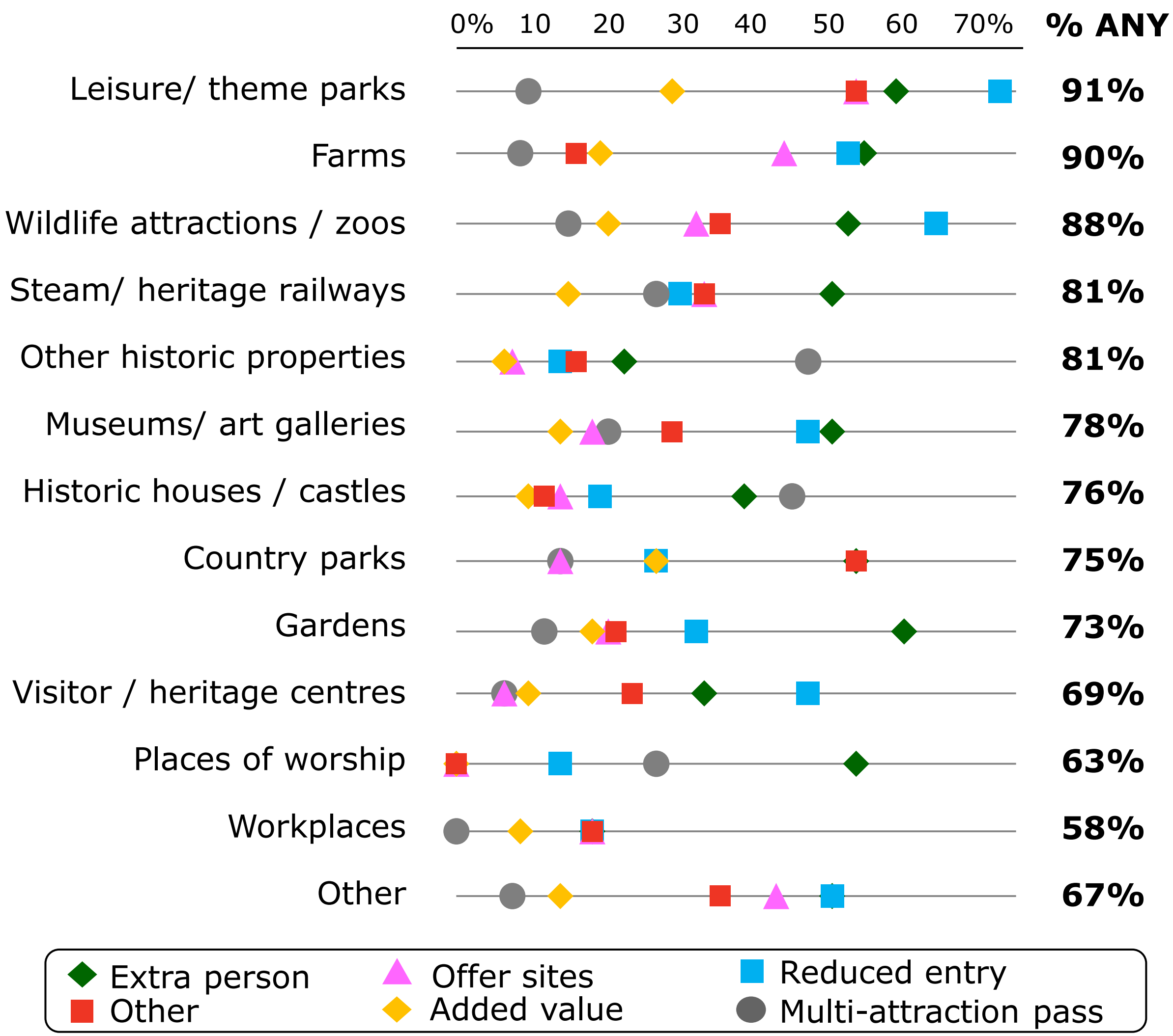
Base: All answering deals/discounts question (1,303)

** N.B. Attractions responding vary between 2013 and 2014 so this is not a direct like for like comparison*

Deals or discounts offered by charging attractions 2014 – by attraction category



Among charging attractions, it is the attractions which tend to focus upon the family market - leisure / theme parks (91%), farms (90%) and wildlife attractions / zoos (88%) - which are most likely to offer deals and discounts.

Deals and discounts are offered across all sectors, although the type of offer varies by category.

Reduced entry discounts and extra person discounts are the most popular offer, but are less likely to be employed at historic houses/ castles, other historic properties and workplaces.

Offer sites, such as Groupon, are employed in the Farms and Wildlife attractions/ zoos sectors.

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Base: All charging attractions answering deals/discounts question (853)
N.B. Country Park, Workplaces and Places of Worship have low base sizes (under 20)

Deals or discounts offered by charging attractions in 2014– by visitor volume

	Visit Volume				
% offering	**Under 10k**	**10k-20k**	**20k-50k**	**50k-100k**	**Over 100k**
ANY (2013)	**49**	**57**	**67**	**69**	**75**
ANY (2014)	**64**	**86**	**86**	**84**	**81**
Extra person e.g. 2 for 1 entry	30	44	44	47	51
Reduced entry price discounts	20	26	37	48	40
Multi-attraction pass e.g. London Pass	16	34	32	31	28
Discounts through offer sites e.g. Groupon	7	20	26	25	21
Added value e.g. reduced exhibition entry, catering/retail discounts	5	11	10	16	25
Other	13	20	23	26	26

Use of deals and discounts is prevalent across all attraction sizes and is growing, particularly at the smaller end of the market. In 2013 around half of attractions with under 10,000 visitors used deals/ discounts to market their offer; this rose to almost two thirds in 2014.

Use of deals and discounts grows with attraction size, but the types of discount used are fairly consistent.

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Base: All charging attractions answering deals/discounts question (808)

Deals or discounts offered by charging attractions in 2014 – by region

	Region (%)								
% offering	**NW**	**NE**	**Y+H**	**EM**	**WM**	**EAST**	**LON**	**SE**	**SW**
ANY	**79**	**83**	**82**	**76**	**76**	**74**	**88**	**76**	**78**
Extra person e.g. 2 for 1 entry	41	29	33	41	41	48	56	44	38
Reduced entry price discounts	32	29	34	26	35	27	29	31	38
Multi-attraction pass e.g. London Pass	19	45	45	20	27	16	63	17	25
Discounts through offer sites e.g. Groupon	13	12	21	21	27	14	22	15	19
Added value e.g. reduced exhibition entry, catering/retail discounts	15	10	7	16	8	11	10	16	12
Other	25	10	21	24	23	12	29	19	23

Offering deals and discounts is common among charging attractions across England, and particularly high in London, where greater competition has led to use of a wider array of offers to attract visitors.

Multi-attraction passes are common in London and also North East and Yorkshire, but used less elsewhere. Discounts through offer sites are most popular in the West Midlands.

VisitEngland™

Base: All charging attractions answering deals/discounts question (808)

Impact of offering deals and discounts - summary

	Offer deals / discounts?	
2013 / 14 change in…	Yes	No
Total visitor admissions	**+4%**	**+3%**
Child admissions	+6%	-1%
Overseas visits	+8%	0%
Local visits	+5%	+2%
Gross revenue	**+6%**	**+6%**

In 2013 we found a significant difference in visitor admission growth according to whether or not attractions offered deals and discounts (+7% growth vs. +3% growth). This variance has reduced in 2014 (+4% vs. +3% growth), and there was no discernible impact on revenue.

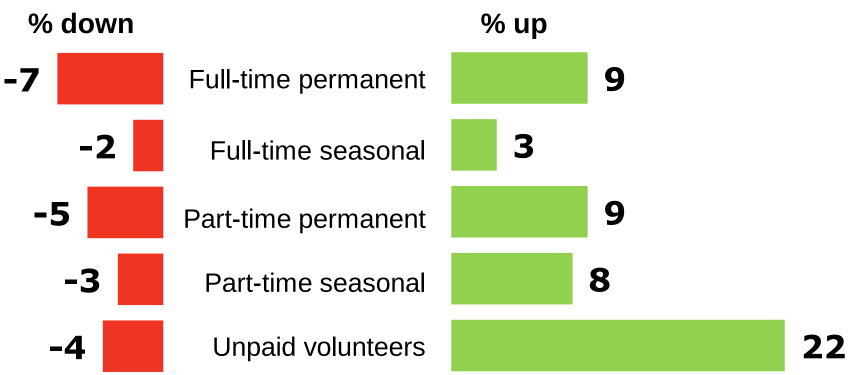
Consumer confidence improved in 2014 (*Source: GfK Confidence Barometer*) so it may be that some visitors are using offers more tactically – checking for offers for places that they are intending to visit anyway.

Deals and discounts do have a clear impact on the family and overseas markets.

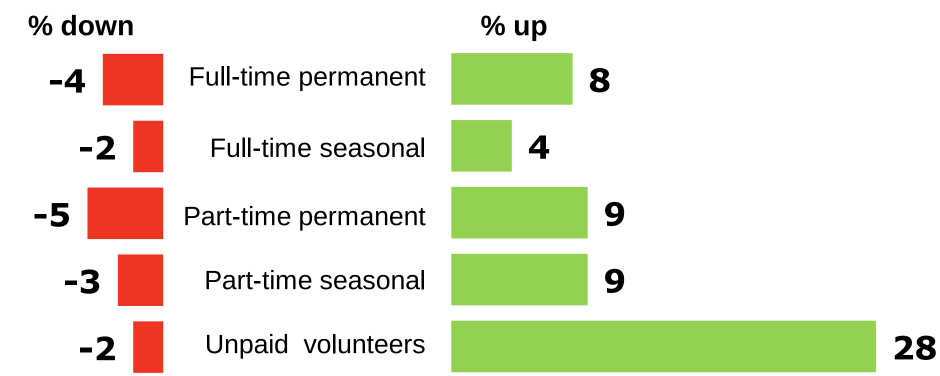
Employment trends

Employment trends

Change in employees since 2013



Anticipated change in employees in 2015



Proportions of attractions employing any of the following employees in 2014:

- 80% full-time permanent
- 47% full-time seasonal
- 81% part-time permanent
- 58% part-time seasonal
- 85% unpaid volunteers

The trend of increasing voluntary workers continued into 2014 and looks set to remain, with 28% of attractions expecting to increase their use of unpaid volunteers in 2015.

More sites increased their full time and part time permanent and seasonal employees than cut head counts in 2014 and with the financial climate improving attractions anticipate further increases in staff across all levels in 2015.

VisitEngland™

Base: All answering employment questions

Employment trends – unpaid volunteers summary (2013 to 2014)

% down	2013 to 2014	% up	% any volunteers in 2014
-4	Country parks	27	86
-7	Farms	18	71
-3	Gardens	28	73
-4	Historic houses / castles	21	91
-5	Other historic properties	11	80
-4	Leisure / theme parks	8	42
-5	Museums / art galleries	24	92
-3	Steam / heritage railways	33	89
-1	Visitor / heritage centres	29	81
-3	Wildlife attractions / zoos	23	84
-4	Workplaces	8	44
-5	Places of worship	19	94
0	Other	0	29

% down		% up	% any volunteers in 2014
-5	Free	22	85
-4	Paid	21	85

% down	2013 to 2014	% up	% any volunteers in 2014
-4	Under 20k visits	18	84
-6	20k-50k visits	19	86
-3	50k-200k visits	26	85
-2	Over 200k visits	31	83

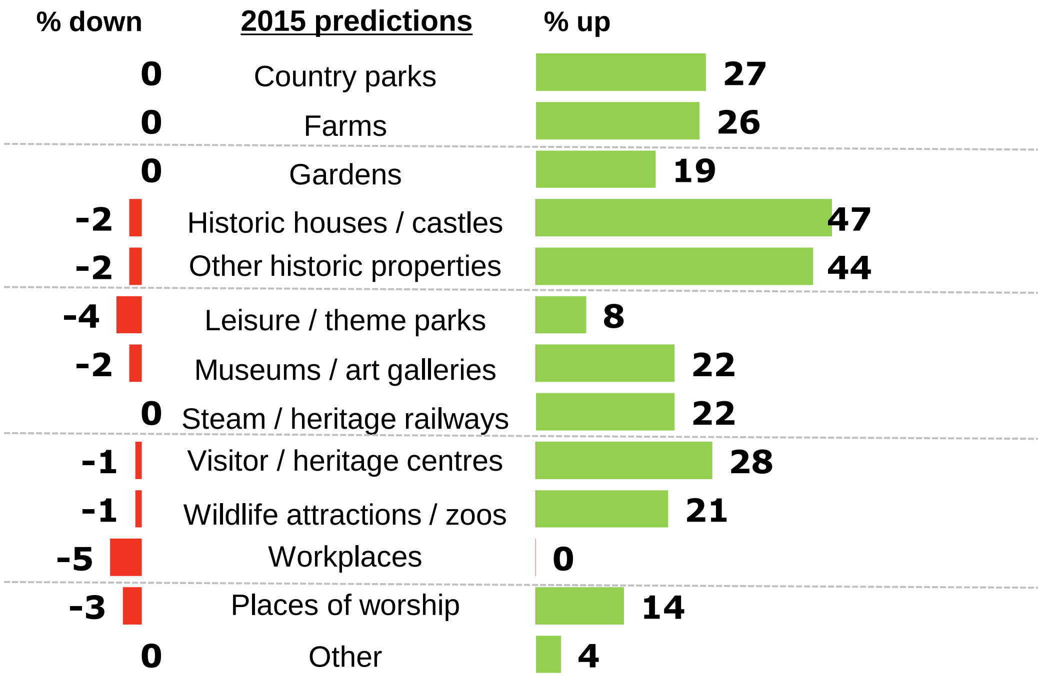
Whilst unpaid volunteers are up across the board, they are again most likely to have increased at the larger attractions, steam/ heritage railways, visitor centres, gardens and country parks.

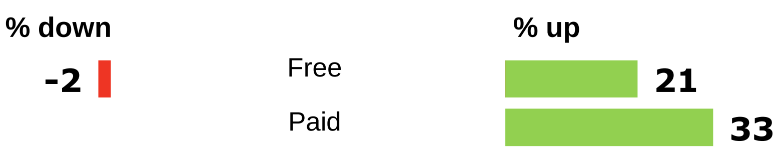
Changes in volunteering staff are consistent across free and paid attractions.

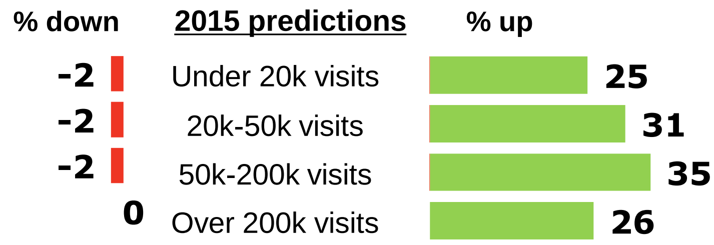
VisitEngland

Base: All answering employment questions (1,338)

Employment trends – unpaid volunteers summary (2015 predictions)







The trend towards unpaid volunteers is predicted to continue again in 2014, with all size and categories of site holding this intention.

Prediction for increases in unpaid volunteers is highest amongst historic properties.

VisitEngland

Base: All answering employment questions (1,327)

Employment trends – full time permanent employees summary (2013-2014)

% down	2013 to 2014	% up	% any FT perm in 2014
-15	Country parks	12	94
-12	Farms	32	96
-11	Gardens	10	93
-4	Historic houses / castles	8	93
-4	Other historic properties	5	76
-4	Leisure / theme parks	13	100
-8	Museums / art galleries	6	69
-3	Steam / heritage railways	17	66
-4	Visitor / heritage centres	6	67
-9	Wildlife attractions / zoos	13	89
-4	Workplaces	12	80
0	Places of worship	7	77
-8	Other	4	76

% down		% up	% any FT perm in 2014
-7	Free	5	72
-7	Paid	11	86

% down	2013 to 2014	% up	% any FT perm in 2014
-5	Under 20k visits	4	61
-8	20k-50k visits	9	93
-5	50k-200k visits	14	99
-15	Over 200k visits	16	99

Although there are more attractions increasing than decreasing full-time permanent staff overall, this masks some differences by type of attraction.

In 2012-13 more farms reduced than increased their full time permanent staff count; in 2013-14 this trend was reversed with almost a third of farm attractions boosting FT permanent staff and only 12% reducing staff. However, Museums and art galleries, country parks and gardens continued to reduce these members of staff in 2014.

Full time permanent staff are declining at free attractions, but numbers have increased in the charging attractions category.

There is a fairly balanced pattern by attraction size with roughly as many attractions increasing full time permanent staff as decreasing in 2014; the exception to this is larger mid size attractions with 50-200,000 staff.

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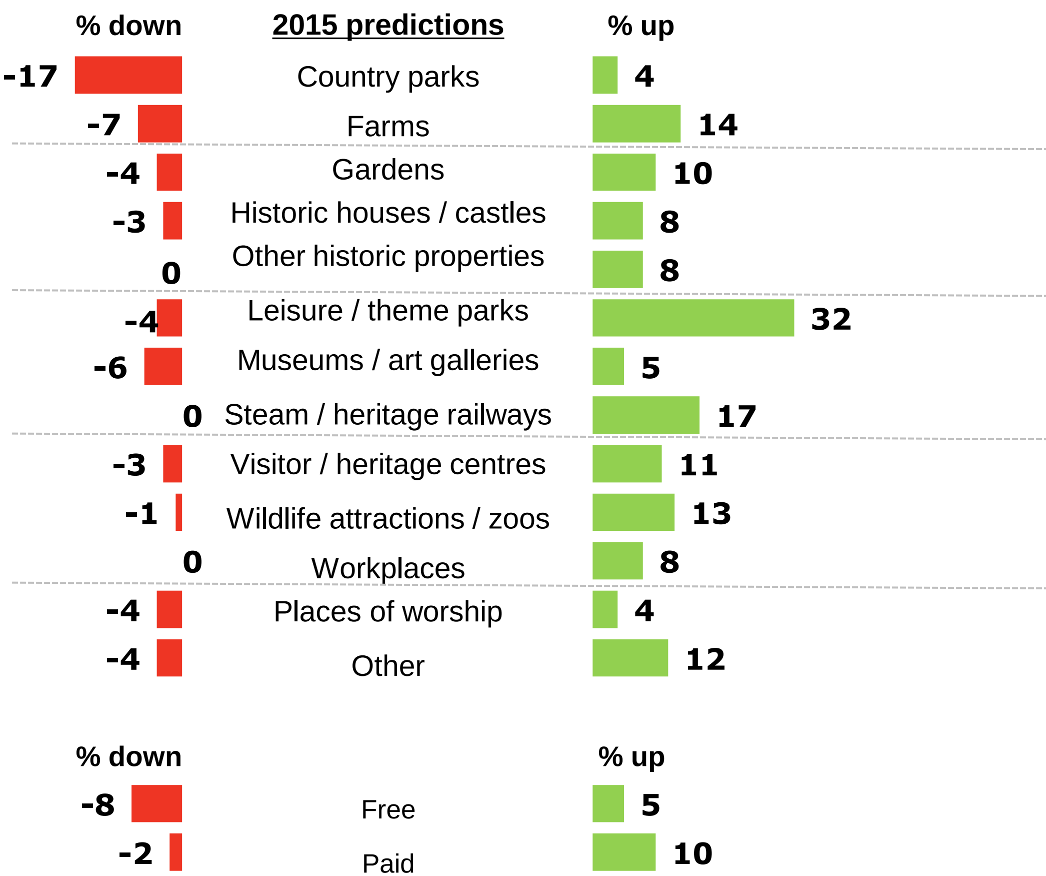
Base: All answering employment questions (1,272)

Employment trends – full time permanent employees summary (2015 predictions)



Large, charging attractions (with over 200,000 visitors) are the most likely to be anticipating increases in permanent full time staff in 2015.

There is substantial variation between categories in their plans for permanent full time staffing in 2015. Country parks, and museums & art galleries are anticipating cuts in staffing. Most other categories, in particular leisure/ theme parks and steam/ heritage railways, are expecting to take on additional full time permanent staff.

VisitEngland™

Base: All answering employment questions

Questionnaire

SURVEY OF VISITS TO VISITOR ATTRACTIONS DURING 2014

Please help VisitEngland establish trends in the attractions' sector in 2014 by taking part in our major annual survey, conducted by BDRC Continental. **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 **30th April 2015** 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:
E-mail:
Position:
Address:

Tel:
Name of Attraction:

E-mail/ telephone for prize draw if different from the above:

ID:
Website:
User Name:

Password:

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 2013, 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 2013 visitor numbers: ☐,☐☐☐,☐☐☐

2.2 What were your visitor numbers during the 2014 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 2014 (paid and free) fell into each category? Adults % ☐☐☐

Children % ☐☐☐

TOTAL 100%

2.4 For 2013, 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 2014?

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

2.5 Did you charge for admission to the main attraction in 2014? Yes ☐ No ☐

2.6 Please provide the standard admission charge (in high season / summer) per person for the main attraction in 2014 (including VAT): Adult £ ☐☐.☐☐p Child £ ☐☐.☐☐p

(£ in 2013) (£ in 2013)

2.7 Origin of visitors:

(a) For 2013, your organisation provided us with a percentage of visitors from overseas of %

i) What percentage of total visitors in 2014 do you estimate were from overseas? ☐☐☐ %

ii) Compared with 2013, was the number of visitors from overseas in 2014: Up ☐ Down ☐ Similar ☐

(b) For 2013, your organisation provided us with a percentage of visitors living locally/within day trip distance of %

i) What percentage of total visitors in 2014 do you estimate lived locally or within day trip distance of your attraction? ☐☐☐ %

ii) Compared with 2013, was the number of visitors living locally or within day trip distance in 2014:

Up ☐ Down ☐ Similar ☐

2.8 Thinking just about your visitors who are staying away from home in the area, what percentage of these visitors would you estimate decided to visit the area mainly because of your attraction? ☐☐☐ %

SECTION THREE – OPERATIONS/MARKETING

3.1 Gross revenue

(a) How did the attraction's gross revenue in 2014 compare with 2013? Up ☐ Down ☐ Similar ☐

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

3.2 During 2014, did your main attraction offer any of the following deals or discounts? N.B Please exclude any deals or discounts that were a part of your own membership schemes

Multi-attraction pass schemes (*e.g. London Pass, other city pass*)	☐	Discounts through offer sites (*e.g. Groupon, SmartSave*)	☐	Reduced entry price discounts	☐
Extra person (*e.g. 2 for 1 entry*)	☐	Added value (*e.g. reduced exhibition entry, catering / retail discounts*)	☐	Other deal or discount	☐
None of these	☐				

3.3 Compared with 2013, was expenditure on marketing activities in 2014: Up ☐ Down ☐ Similar ☐

3.4 Which of the following digital communications did your main attraction offer in 2014?

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

3.5 In 2014, was your main attraction................?

Open all year round ☐ Closed for part of the year – regular seasonal closure ☐ Closed for part of the year – other reason e.g. *refurbishment, repairs* ☐

SECTION FOUR – HUMAN RESOURCES

4.1 Compared with 2013, was the number of people employed in any tourism-related activities in the attraction in 2014 (including yourself, working owners and self employed)...?:

Full-time permanent:	Up ☐	Down ☐	Similar ☐	None ☐	*Full-time seasonal:*	Up ☐	Down ☐	Similar ☐	None ☐
Part-time permanent:	Up ☐	Down ☐	Similar ☐	None ☐	*Part-time seasonal:*	Up ☐	Down ☐	Similar ☐	None ☐
Unpaid volunteers:	Up ☐	Down ☐	Similar ☐	None ☐					

4.2 And compared with 2014, do you anticipate the number of people employed in any tourism-related activities in the attraction in 2015 to be:

Full-time permanent:	Up ☐	Down ☐	Similar ☐	None ☐	*Full-time seasonal:*	Up ☐	Down ☐	Similar ☐	None ☐
Part-time permanent:	Up ☐	Down ☐	Similar ☐	None ☐	*Part-time seasonal:*	Up ☐	Down ☐	Similar ☐	None ☐
Unpaid volunteers:	Up ☐	Down ☐	Similar ☐	None ☐					

SECTION FIVE - 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 BDRC Continental and the staff at VisitEngland and local Destination Management Organisations. However, we do encourage attractions to provide permission to publish visitor numbers, which could help to raise the profile of your organisation.

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

5.2 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 ☐

5.3 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 ☐

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 30th April 2015 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: Abbie McPhie (VisitEngland, t: 0207 578 1456, e: annualattractionssurvey@visitengland.org) or Katie Vosper (BDRC Continental, t: 0207 400 0380, e: katie.vosper@bdrc-continental.com).