FOREDOWN TOWER

Appendix 2: Visitor attractions trends

This Appendix to Blue Sail's report on the future of Foredown Tower[1] uses information from the following two reports:

Visitor Attraction Trends in England 2006, VisitBritain
2002/03 Leisure Day Visits Survey for England, Wales and Scotland, TNS Travel and Tourism for a Consortium of Agencies

OVERVIEW

There has been huge growth in wealth and leisure time, yet this is matched by a diverse range of leisure interests creating a large number of small niche markets. The main winners have been the countryside and quiet coastline for informal recreation (walking, cycling, etc), towns, cities and out-of-town shopping malls for retail therapy - and in parallel, a massive rise in the frequency of people eating out, matched by a significant increase in choice and quality.

In this context the number of visits to attractions in the UK over the last 20 years has been relatively stable. Yet there has been an increase in the number of new visitor attractions opening - prompted at the turn of this decade by Millennium funded projects, heritage lottery funded projects and the introduction of free admission to national museums. So the smaller independent attractions are being squeezed.

There have been some notable casualties at some new attractions. Over-ambitious visitor projections have led to closures - the National Pop Music Centre at Sheffield and Earth Centre in Doncaster. Others have reached a plateau and need to diversify to increase numbers - Think Tank in Birmingham - Life Centre in Newcastle.

Despite the growth in attractions aiming to have contemporary messages (about the planet, sustainability, etc) the most popular ones tend to be simple and traditional - viewing towers (London Eye, Spinnaker at

[1] *The Future of Foredown Tower as a Visitor Attraction*, 2008, Blue Sail Consulting Ltd for Brighton & Hove City Council

Portsmouth) and based on the natural world - aquaria and zoos (Sea Life Centres, etc).

There has been a significant change in the ownership of visitor attractions. Mergers and acquisitions have led to the Merlin Entertainment Group becoming a global force in leisure - owning the former Tussauds Group properties (such as Warwick Castle and Alton Towers), London Eye, Sealife Centres Legoland, etc. There are major players - not least the National Trust with 3.5 million members gaining free acess to hundreds of properties.

The combination of Merlin, National Museums and Millennium / HLF funded projects has led to a small number of powerful players - household names with significant marketing clout.

The attraction sector has suffered from a lack of re-investment. Regardless of the theme or concept, the displays and interpretation are often out-dated especially in the current technological age. Similarly the catering experience can be disappointing compared to the high street experience of coffee houses.

More attractions are innovating and diversifying:

- Events are important for repeat business (but are labour intensive and often weather dependent).
- Schools are important for many attractions. They come at times (midweek) that complement other visitor patterns. But the education market has to be aligned with the national curriculum and carries responsibilities of learning on site, supervision, health and safety and risk assessment. Cost is also a factor, especially coach hire and travel - parents are now obliged to pay for school trips, it is no longer a core part of the school's budget.
- Private hire is becoming more popular - character properties can be ideal for small meetings, family functions, weddings, dinner parties. Large estates can be ideal for historic car rallies, film shoots, outward bound training, etc

VISITOR ATTRACTION FACTS AND FIGURES

The latest data is available for 2006 (note: 2007 data should be published by August 2008).

Background

2006 was generally warm and sunny year in England with sunshine levels 13% above average across the year. The summer period was polarized with June and July and June recording particularly high sunshine levels but August seeing sunshine below average. November and September also recorded high sunshine levels. Rainfall in England was about average across the year.

At the outset of 2006, there was concern surrounding the ability of the tourism industry to recover from the effects of the July bombings in London.

Overview

There was a 3% increase in visitor admissions overall in 2006. This compares favourably with the past two years which have recorded a relatively flat position.

There was a particularly strong increase in visits to museums and art galleries (8%), particularly notable in London (11%). Visits to historic monuments, archaeological sites, ships, windmills, watermills amongst others, also recorded an 8% increase in visits in 2006. Outdoor attractions recorded strong increases in 2005, driven by the fine weather. However, despite the relatively wetter 2006, many of these categories managed to maintain visits. Wildlife attractions / zoos increased visits by 2% in 2006 (5% in 2005) and farms by 1% (5% in 2005). Country parks and gardens declined slightly (but 2005 was exceptional due to dry weather). Visits to historic houses and castles increased slightly (by 1%) in 2006. Leisure / theme parks showed signs of stability in 2006, with visits declining by less than 1%. This followed a significant 6% decline in 2005 and a 1% decline in 2004.

Following a year of stability among both free and paid attractions in 2005, visits to free attractions increased by 5% in 2006 - driven by a 9% increase in visits to free museums / art galleries. Visits to paid attractions remained stable.

The overall 3% increase in visits reported in 2006 was driven primarily by urban attractions which increased by 6%. Visits to each of coastal (1%) and rural (1%) attractions remained relatively stable.

During 2006, the trend for visits to migrate away from the very smallest attractions has again continued. Attractions with 20,000 visits or less reported another decline in visits (3%), following 2% declines in each of the previous two years. Attractions with between 20,000 and 200,000 visits per annum continued to record slight growth.

Conversely, the largest attractions with over 200,000 visits recorded a notable increase in visits in 2006 (4%). This was driven by increases in visits to some of the major national free museums and art galleries, particularly in London.

Visits to attractions showed growth in the majority of regions, although increases in visits were particularly strong in London (9%). Visits in the South east increased by 1%.

Adult admission prices increased by 8% in 2006. The rate of increase in admission prices is accelerating slightly year on year, with each of the past four years registering higher increases than the year before (7% in 2005, 6% in 2004, 5% in 2003). The average adult admission charge among paid attractions was £5.21 in 2006. Categories with the highest increases in adult admission charges in 2006 were farms (15%), steam / heritage railways (12%) and places of worship (16%).

Adult admission charges continued to vary considerably in 2006 according to attraction category. Museums /art galleries reported the lowest average admission charges at £3.57, whilst the highest average admission charges were recorded for leisure / theme parks (£10.92) and wildlife attractions/zoos (£7.41).

Gross revenues were reported to have increased by an average of 7% in 2006, the same increase as reported in both 2005 and 2004. However, this increase was slightly lower than that observed in either 2003 (10%) or 2002 (11%). The increase in the South east was 5%. Increases in gross revenue for museums / art galleries outperformed the attractions market overall, with gross revenue increasing by an average of 9% in 2006. Other categories reporting increases in gross revenue higher than the England average were country parks (11%), farms (9%), leisure / theme parks (8%) and visitor / heritage centres (8%).

24% of attractions indicated an increase in marketing spend in 2006 when compared to 2005 and 11% a decrease. The corresponding figures for the South East were 23% reporting an increase and 12% a decrease. This was very similar to that reported in each of the past two years. However, this represents a slight tightening of budgets since 2003 when 30% of attractions indicated an increase and only 11% a decrease. Leisure / theme parks (34% increased marketing expenditure), farms (32%) and steam / heritage railways (32%) were all more likely to report an increase in marketing expenditure in 2006, as they were in 2005. Country parks (14%), other historic properties (15%) and places of worship (18%) were least likely to have increased their marketing spend.

VISITOR ATTRACTIONS IN THE SOUTH EAST

Major paid attractions

Attraction	2004	2005	2006	% 05/06	Entry
Canterbury Cathedral	1091684	1054886	1047380	-0.7	6.00
West Wittering Beach		1000000	1000000	0.0	3.00
Windsor Castle	923280	944872	986575	4.4	13.50
Wisley Garden	698500	732911	683851	-6.7	7.50
Spinnaker Tower		129813	530590	308.7	5.95
Marwell Zoological Park		504747	510955	1.2	13.50
Portsmouth Historic Dockyard	378891	512714	449933	-12.2	16.00
Wakehurst Place	420831	428770	433187	1.0	8.00
Leeds Castle	422801	407076	413655	1.6	13.00
Blenheim Palace	378552	402886	374789	-7.0	14.00

Major free attractions

Attraction	2004	2005	2006	% 05/06
Flamingo Family Fun Park		1000000	1000000	0.0
Willen Lake and Park	1000000	1000000	1000000	0.0
De La Warr Pavilion	DK	500000	500000	0.0
Harbour Park Family Entertainment	395066	415000	440000	6.0
Oxford University Museum of Natural History	290198	294731	320000	8.6
Ventnor Botanic Garden	225640	275252	277168	0.7
Beckhurst Glass, Glass Studio	200000	250000	250000	0.0
Brighton Museum & Art Gallery	221216	227156	225496	-0.7
Banbury Museum	231106	238665	225346	-5.6
Pitt Rivers Museum	163741	170171	190737	12.1

DAY VISIT SURVEY

The last Day Visit Survey was published in 2004.

Extent of Participation

- 81% of all adults in England had made a leisure day visit in the previous two weeks with 21% of all adults going to the countryside and 8% of all adults going to forest / woodland
- The average number of trips in the two week period for those taking trips (i.e. 81% of all adults) was 4.4 for England
- In the course of the year 62% of all adults in England had visited the countryside and 40% had visited forest / woodland

Destination

- 71% of all trips were to towns and cities, 24% to the countryside and 5% to the coast. The countryside figure includes 5% to forest / woodland

General Characteristics of Visitors

- Countryside - 52% over 45 years, 51% female, 63% ABC1, 89% car owners, 31% with children in household, 50% full-time work
- Forest / Woodland - 40% over 45 years, 48% female, 66% ABC1, 91% car owners, 43% with children in household, 51% full-time work
- Access to private transport was the key factor
- Those who had made a trip to the countryside, compared to people who had not made a trip, were likely to be ABC1, over 35, in households with 2 cars
- Those who had made a trip to forest / woodland, compared to people who had not made a trip, were likely to be male, ABC1, in households with 2 cars, in full or part-time employment, in a household with children under 10 and especially under 5
- In lifecycle terms fewer countryside and forest / woodland trips were taken by married couples under 34 with no children and single people over 55
- Only 1% of trips to countryside and forest / woodland were from non-whites

Expenditure

- The average spend per trip was £13.70
- The average spend per countryside trip was £8.60 -he main categories of expenditure were meals £3.00, alcohol £1.40, fuel £1.10, plants 40p, souvenirs 40p and convenience goods 30p
- The average spending per forest / woodland trip was much lower at £4.70 - the main categories of expenditure were meals £1.50, fuel 90p, alcohol 50p and souvenirs 40p

Activities

- The main activities on a countryside trip were to walk / ramble (including dog walking) 32%, eat or drink out 15%, take part in sports 11%, visit friends and relatives at home 10%

- The main activities on a forest / woodland trip are walking 62% followed by cycling 8%

Activity Characteristics of Walkers

- Most popular for 55 to 64 year olds and 35 to 44 year olds - less popular with under 24s and over 75s
- 45% male and 55% female
- 50% ABC1 and 47% C2DE
- 41% have one car in household, 33% have two and 13% have three - 13% have no car
- 35% work full-time, 16% work part-time and 26% are retired - 6% self-employed and 4% unemployed
- 76% have no children in the household
- 86% of walks are under three hour duration
- Average distance is 8.6 miles
- Days of the week: Monday 10%, Tuesday 18%, Wednesday 12%, Thursday 16%, Friday 11%, Saturday 16%, Sunday 17%

Length and Duration of Trips

- The average round trip to the countryside was 18.7 miles - however this is skewed by a small number of longer trips - 16% are up to 1 mile, 10% are 1 to 2 miles, 24% are 2 to 5 miles and 17% are 5 to 10 miles
- The average round trip to forest / woodland was 15 miles - however this is also skewed by a small number of longer trips - 12% are up to 1 mile, 14% are 1 to 2 miles, 36% are 2 to 5 miles and 14% are 5 to 10 miles
- The average duration of the countryside trip was 3 hours 10 minutes with 2 hours 20 minutes spent at the destination - these averages are skewed by 34% of countryside trips being less than 1 hour
- The average duration of the forest / woodland trip was 2 hours 30 minutes - these averages are skewed by 59% of forest / woodland trips being less than 1 hour.
- 57% of countryside trips were by car and 36% on foot (reflecting the frequent, dog walking trips)
- 81% of forest / woodland trips and 73% of countryside trips were described as regular
- Countryside visits are year-round but peak in July

Party Mix

- Children were present in the party for 17% of countryside trips and 21% of forest / woodland trips
- The proportion of people on their own was 38% for countryside trips and 50% for forest / woodland trips

Locations

- 30% of British adults had claimed to have visited National Parks over the last 12 months (although a fifth had not actually done so) and 13% had claimed to have visited an AONB (yet 44% had not actually done so) - they thought they had visited

- The London population generated 43 million annual trips to the countryside - the figure for the South East region is 204 million trips - 246 million countryside trips were taken in the South East region - the most popular region in England