Visitor Attractions Trends in England 2019

Annual Report for Heritage Counts

Prepared for Historic England

Historic England

BVa BDRC

Report Contents

1. Introduction and Background

This report presents key tables from the 'historic sites' element of the Survey of Visits to Visitor Attractions undertaken in England by VisitEngland. The report provides a comprehensive England-wide analysis of attractions and visits in 2019 and trend data.

1.1 Visitor Attraction Definition

For the purposes of the survey, the definition of a visitor attraction is:

"..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."

1.2 Research Objectives

The purpose of the survey is to monitor trends in the visitor attraction sector in England and to improve understanding of the dynamics of the sector. The findings contribute to regional and national estimates of the economic impact of tourism and inform regional development and planning work. The results of the survey allow operators to benchmark their operation within their category, within their region and across the sector as a whole.

1.3 Survey Method

Since the 2008 survey, attractions have had the option of online survey completion in addition to the postal self-completion survey. All attractions for whom email contacts were held were sent an email invitation to take part, with a link to their attraction's online questionnaire. Attractions not responding were subsequently sent a postal questionnaire alongside attractions for whom no email contacts were held. The majority of attractions now choose to complete the survey online.

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

1.4   Sample

The following English visitor attraction sub categories were defined as historic sites:

- Castle/fort
- Garden
- Historic house/palace
- Historic monument/archaeological site

- Heritage/visitor centre
- Place of worship
- Other historic site

1,308 English visitor attractions provided visits figures for the year 2019. 674 historic sites responded, compared with 725 for the year 2018 and 693 for the year 2017.

Some historic monuments were excluded as they are not physically 'manned', therefore unable to provide visitor numbers.

Given that the value of this report lies predominantly in the assessment of trends over time, perhaps the more important sample size measure is the number of attractions providing admissions information for both 2019 and 2018. In 2019 there were 586 such historic sites. Previous years comparators: 2018 (623), 2017 (645).

Table A.1   Response by Attraction Category

Category	Number of attractions that provided data (2019)	Number of attractions that provided data (2018)	Number of attractions that provided data (2017)
Castles/forts	81	82	83
Gardens	91	89	88
Historic houses	255	272	259
Historic monuments	52	53	56
Visitor/heritage centres	70	81	82
Places of worship	34	54	61
Other historic sites	91	94	64
Total	**674**	**725**	**693**

1.5   Survey Definitions

Attractions were asked to categorise themselves using the following definitions. Guidelines were sent to each attraction along with the questionnaire to assist with this process. In the tables, an asterisk is used to indicate a percentage is less than 0.5%. A plus or minus sign indicates whether the value is positive or negative.

Abbreviation	Category	Description
C	Castles/forts	Castles, forts, citadels, defence towers
G	Gardens	Gardens, arboretums and botanical gardens
HH	Historic houses	Historic houses, historic houses and gardens, palaces, royal residences
HM	Historic monuments	Historic monuments, archaeological sites, standing stones
VC	Visitor/Heritage Centres	Visitor centres, heritage centres, information/orientation centres, park ranger centres, cultural interpretation centres
WO	Places of Worship	Cathedrals, churches, chapels and other attractions of any religion that are still in use as places of worship
OHP	Other historic sites	Historic ships, lighthouses, windmills, watermills, historic workplaces

Abbreviation	Government Office Region	Counties/unitary authorities within region
EAST	East	**Counties**: Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk, Suffolk **UAs:** Luton, Peterborough, Southend-on-Sea, Thurrock
EM	East Midlands	**Counties:** Derbyshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire **UAs:** Derby, Leicester, Nottingham, Rutland
LON	London	All Greater London boroughs
NE	North East	**Counties:** County Durham, Northumberland **UAs:** Darlington, Hartlepool, Middlesborough, Redcar & Cleveland, Stockton-on-Tees **Former Met.:** Tyne and Wear *(Gateshead, Newcastle, N Tyneside, S Tyneside, Sunderland)*
NW	North West	**Counties:** Cheshire, Cumbria, Lancashire **UAs:** Blackburn with Darwen, Blackpool, Halton, Warrington **Former Met.:** Greater Manchester *(Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan),* Merseyside *(Liverpool, Knowsley, Sefton, St Helens, Wirral)*
SE	South East	**Counties:** Buckinghamshire, East Sussex, Hampshire, Kent, Oxfordshire, Surrey, West Sussex **UAs:** Bracknell Forest, Brighton & Hove, Isle of Wight, Medway, Milton Keynes, Portsmouth, Reading, Slough, Southampton W. Berkshire, Windsor & Maidenhead, Wokingham
SW	South West	**Counties:** Cornwall, Devon, Dorset, Gloucestershire, Somerset, Wiltshire, Isles of Scilly **UAs:** Bath & NE Somerset, Bournemouth, Bristol, N Somerset, Plymouth, Poole, Swindon, Torbay, S Gloucestershire
WM	West Midlands	**Counties:** Shropshire, Staffordshire, Warwickshire, Worcestershire **UAs:** Herefordshire, Stoke-on-Trent, Telford & Wrekin **Former Met.:** West Midlands *(Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall, Wolverhampton)*
Y&H	Yorkshire/ The Humber	**Counties:** North Yorkshire **UAs:** East Riding of Yorkshire, Kingston-upon-Hull, NE Lincolnshire, N Lincolnshire, York **Former Met.:** South Yorkshire *(Barnsley, Doncaster, Rotherham, Sheffield)* West Yorkshire *(Bradford, Calderdale, Kirklees, Leeds, Wakefield)*

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2. Main Tables

2.1 Geographical Distribution of Historic Sites

Table A.2 illustrates the distribution of historic sites by category type within each Government Office Region (GOR).

Table A.2 Geographic Distribution of Historic Sites – by GOR

	TOTAL		N.E.		N.W.		Y&H		E.M.		W.M.		EAST		LON		S.E.		S.W.	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Castles/forts	81		17	21	4	5	9	11	7	9	6	7	3	4	1	1	13	16	21	26
Gardens	91		4	4	4	4	6	7	3	3	7	8	16	18	2	2	22	24	27	30
Historic houses	255		7	3	25	10	17	7	29	11	45	18	20	8	17	7	51	20	44	17
Historic monuments	52		7	13	2	4	7	13	2	4	7	13	8	15	4	8	5	10	10	19
Visitor/heritage centres	70		5	7	10	14	6	9	11	16	3	4	10	14	2	3	13	19	10	14
Places of worship	34		3	9	3	9	5	15	-	-	5	15	4	12	4	12	5	15	5	15
Other historic sites	91		6	7	6	7	5	5	4	4	8	9	14	15	5	5	23	25	20	22
TOTAL / total %	**674**	*100*	**49**	*7*	**54**	*8*	**55**	*8*	**56**	*8*	**81**	*21*	**75**	*11*	**35**	*5*	**132**	*20*	**137**	*20*

2.2 Visitor Numbers to Historic Sites

Table A.3 illustrates the numbers and profile of visits (paid and free) to historic sites by category type among responding attractions. The trend data (% change 18/19) reports the change in visits among attractions that have provided visits figures for both 2018 and 2019.

Table A.3 Visits to Historic Sites

	Sample	% Of visits	Average no. of visits	Total visits	% change 18/19
SAMPLE		(74.4m)	(74.5m)	(74.5m)	
Castles/forts	*81*	10%	93,000	7,555,000	0
Gardens	*91*	16%	140,000	11,820,000	+10
Historic houses	*255*	40%	128,000	29,779,000	+7
Historic monuments	*52*	9%	151,000	6,377,000	+5
Visitor/heritage centres	*70*	7%	77,000	5,037,000	+1
Places of worship	*34*	12%	264,000	8,715,000	+7
Other historic sites	*91*	7%	74,000	5,179,000	+2
TOTAL HISTORIC	*674*	**100%**	**122,000**	**74,462,000**	**+5**
TOTAL ATTRACTIONS	**1,308**	**N/A**	**160,000**	**193,987,000**	**+3**

Table A.4 examines numbers of visits to historic site types within each Government Office Region.

Table A.4   Visits to Historic Sites – by GOR

Data in 000s	Total	N.E.	N.W.	Y&H	E.M.	W.M.	East	Lon	S.E.	S.W.
Castles/forts	7,555	770	154	508	367	298	142	2,984	1,136	1,194
Gardens	11,820	330	145	565	48	235	944	2,388	3,680	3,486
Historic houses	29,779	684	2,226	1,166	2,468	4,167	3,997	3,187	7,409	4,475
Historic monuments	6,377	174	14	271	82	55	1362	1,119	188	3,113
Visitor/heritage centres	5,037	281	585	297	423	339	617	1,638	589	269
Places of worship	8,715	728	426	803	-	554	574	3,315	1,626	687
Other historic sites	5,179	42	401	446	78	138	136	2,428	1,048	461
TOTAL HISTORIC	**74,462**	**3,009**	**3,952**	**4,057**	**3,466**	**5,786**	**7,772**	**17,059**	**15,676**	**13,685**
Total % of visits	*100*	*4*	*5*	*5*	*5*	*8*	*10*	*23*	*21*	*18*
% change 18/19	*+5*	*+9*	*-4*	*+7*	*+6*	*+6*	*+6*	*+5*	*+8*	*+5*
TOTAL ATTRACTIONS	**193,987**	**6,615**	**20,093**	**10,943**	**8,187**	**10,386**	**14,578**	**72,332**	**29,656**	**21,006**
Total % of visits	*100*	*3*	*10*	*6*	*4*	*5*	*8*	*37*	*15*	*11*
% change 18/19	*+3*	*+4*	*-5*	*-2*	*+7*	*+1*	*+6*	*+3*	*+4*	*+4*

2.3   Origin of Visitors to Historic Sites

Attractions were asked to estimate the proportion of its visits accounted for by overseas visitors and by local/day trip visitors. Table A.5 illustrates the results within each historic site category.

Table A.5   Origin of Visitors to Historic Sites

	% Overseas	% 18/19	% Local/day trip	% Other UK
Castles/forts	15	-13	40	45
Gardens	11	+11	73	16
Historic houses	15	-2	63	23
Historic monuments	41	+2	35	24
Visitor/heritage centres	18	-4	49	33
Places of worship	29	+27	47	24
Other historic sites	35	-16	37	28
TOTAL HISTORIC	**23**	**+2**	**51**	**26**
TOTAL ATTRACTIONS	**19**	**+2**	**59**	**22**

Table A.6 illustrates the year on year changes by visitor type.

Table A.6   Trends in Origin of Visitors to Historic Sites

	Overseas % change	Local/day trip % change
2008-09	-3	+17
2009-10	+11	+4
2010-11	+12	+5
2011-12	-1	-6
2012-13	+2	+11
2013-14	-*	+7
2014-15	+2	+7
2015-16	+1	+7
2016-17	+7	+7
2017-18	+3	-1
2018-19	+2	+7

Tables A.7 and A.8 illustrate the year on year changes of overseas visitors and local/day trip visitors by Government Office Region.

Table A.7   Trends of Overseas Visitors to Historic Sites – by GOR

OVERSEAS VISITORS	Overall % change	N.E. % change	N.W. % change	Y&H % change	E.M. % change	W.M % change	EAST % change	LON % change	S.E. % change	S.W. % change
2008-09	**-3**	+*	+23	+17	+5	-2	+16	-6	-14	+5
2009-10	**+11**	-15	-1	-11	-5	+1	-5	+22	+2	+19
2010-11	**+12**	-*	+36	+17	+23	+6	+15	+11	+9	+14
2011-12	**-1**	-9	-6	-8	-2	-10	-6	+3	-5	+1
2012-13	**+2**	+20	+18	-5	+33	+3	+12	+18	-2	-25
2013-14	**-***	+7	+6	+5	+37	+5	+32	-2	+3	-7
2014-15	**+2**	-13	-9	+15	+29	-18	+1	+*	+4	+5
2015-16	**+1**	+3	+2	+1	-7	+9	-5	-3	+1	+11
2016-17	**+7**	-15	-12	-15	-24	-14	+12	+8	+5	+20
2017-18	**+3**	-3	+35	-2	-25	-4	+11	+5	+5	-4
2018-19	**+2**	+14	-14	+32	+28	-14	-29	+9	+7	+4

Table A.8   Trends of Local/Day Trip Visitors to Historic Sites – by GOR

LOCAL/DAY TRIP VISITORS	Overall % change	N.E. % change	N.W. % change	Y&H % change	E.M. % change	W.M % change	EAST % change	LON % change	S.E. % change	S.W. % change
2008-09	**+17**	+29	+21	+20	+25	+9	+7	+21	+18	+17
2009-10	**+4**	-7	+3	+13	+7	+*	+*	+1	+2	+5
2010-11	**+5**	-*	-16	-4	+13	+17	+13	+4	+6	+2
2011-12	**-6**	-7	-7	-6	-2	-3	-3	-22	-4	-8
2012-13	**+11**	+14	-9	+8	+13	+4	+8	+12	+14	+32
2013-14	**+7**	+5	+9	+12	-12	+3	+7	+20	+4	+6
2014-15	**+7**	+2	+1	+5	+20	+9	+6	+3	+2	+15
2015-16	**+7**	+14	-2	+9	-4	+2	+9	+10	+7	+11
2016-17	**+7**	+17	+7	+6	-5	+9	+14	+11	+2	+10
2017-18	**-1**	0	-1	-4	-10	+16	+3	-11	+1	+2
2018-19	**+7**	+13	-2	+11	-8	+3	0	+7	+16	+8

Table A.9 examines the origin of visitors by Government Office Region.

Table A.9   Origin of Visitors to Historic Sites – by GOR

	% Overseas	% Local/day trip	% Other UK
North East	15	46	39
North West	13	68	19
Yorkshire and The Humber	25	47	28
East Midlands	8	67	24
West Midlands	16	54	31
East	8	76	16
London	40	31	29
South East	20	53	27
South West	34	36	30
TOTAL HISTORIC	**23**	**51**	**26**

2.4   Family Visits to Historic Sites

Attractions were asked to estimate the proportion of its visits accounted for by family groups (i.e. parties with children aged under 18), and whether this was higher, lower or similar to 2018. Table A.10 illustrates the results within each historic site category.

Table A.10   Family Group Visits to Historic Sites

	Sample	% Increase	% Similar	% Decrease	Proportion of total visits
Castles/forts	(63)	5	89	6	24%
Gardens	(48)	19	79	2	23%
Historic houses	(99)	6	89	5	26%
Historic monuments	(40)	3	95	3	20%
Visitor/heritage centres	(54)	19	76	6	27%
Places of worship	(26)	8	88	4	17%
Other historic sites	(45)	18	76	7	31%
TOTAL HISTORIC	**(375)**	**10**	**85**	**5**	**25%**
TOTAL ATTRACTIONS	**(853)**	**12**	**81**	**7**	**32%**

2.5   Free/Paid Admission to Historic Sites

Attractions were asked whether they charged admission to the main attraction in 2019. Table A.11 illustrates the proportions of attractions and visits that were paid or free admission within each historic site type.

Table A.11   Free/Paid Admission to Historic Sites

	Free Admission		Paid Admission	
	% Of attractions	% Of visits	% Of attractions	% Of visits
Castles/forts	4	2	96	98
Gardens	9	1	91	99
Historic houses	9	8	91	92
Historic monuments	25	21	75	79
Visitor/heritage centres	61	38	39	62
Places of worship	82	40	18	60
Other historic sites	37	6	63	94
TOTAL HISTORIC	**22**	**13**	**78**	**87**
TOTAL ATTRACTIONS	**37**	**51**	**63**	**49**

Table A.12 illustrates the proportions of attractions and visits that were paid or free admission within each region.

Table A.12   Free/Paid Admission to Historic Sites

	Free Admission		Paid Admission	
	% Of attractions	% Of visits	% Of attractions	% Of visits
North East	29	35	71	65
North West	39	29	61	71
Yorkshire and The Humber	24	9	76	91
East Midlands	29	12	71	88
West Midlands	21	18	79	82
East	28	47	72	53
London	11	1	89	99
South East	18	6	82	94
South West	15	7	85	93
TOTAL HISTORIC	**22**	**13**	**78**	**87**
TOTAL ATTRACTIONS	**37**	**51**	**63**	**49**

2.6   Admission Prices to Historic Sites

Table A.13 examines the average admission prices charged by attractions in each historic site category type in 2019. Prices for both adults and children exclude free attractions. N.B. Attractions that charged for adults but not children are included within the adult category but excluded from the child category.

Table A.13   Average Admission Price to Historic Sites (Attractions Charging)

	Sample (adult paid attractions)	Average adult admission charge	Average child admission charge	Adult/child charge ratio %
Castles/forts	(77)	£8.39	£5.19	62
Gardens	(80)	£8.95	£4.74	53
Historic houses	(222)	£10.83	£5.78	53
Historic monuments	(38)	£7.89	£4.80	61
Visitor/heritage centres	(27)	£8.58	£5.13	60
Places of worship	(6*)	*	*	*
Other historic sites	(52)	£6.98	£3.81	55
TOTAL HISTORIC	**(502)**	**£9.44**	**£5.19**	**55**
TOTAL ATTRACTIONS	**(790)**	**£8.99**	**£5.42**	**60**

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Table A.14 examines the average admission prices charged by attractions in each region in 2019.

Table A.14   Average Admission Price by Region (Attractions Charging)

	Sample (adult paid attractions)	Average adult admission charge	Average child admission charge	Adult/child charge ratio %
North East	(34)	£7.51	£4.20	56
North West	(32)	£9.82	£5.24	53
Yorkshire and The Humber	(42)	£8.86	£5.00	56
East Midlands	(37)	£9.50	£5.28	56
West Midlands	(61)	£8.95	£4.71	53
East	(52)	£8.27	£4.85	59
London	(30)	£13.38	£7.07	53
South East	(103)	£10.00	£5.63	56
South West	(111)	£9.37	£5.11	55
TOTAL HISTORIC	**(502)**	**£9.44**	**£5.19**	**55**
TOTAL ATTRACTIONS	**(790)**	**£8.99**	**£5.42**	**60**

Table A.15 shows the trends in adult admission fees since 2008-09.

Table A.15   Trends in Average Adult Admission Prices to Historic Sites

	Adult admission fees % change
2008-09	+4
2009-10	+5
2010-11	+6
2011-12	+5
2012-13	+4
2013-14	+4
2014-15	+5
2015-16	+8
2016-17	+5
2017-18	+6
2018-19	+6

2.7   Revenue of Historic Sites

Attractions were asked to indicate whether their gross revenue had increased, decreased or remained similar to the levels seen in 2018. Table A.16 illustrates the results by historic site category type.

Table A.16   Gross Revenue Trend at Historic Sites 2018-2019

	Sample	% Increase	% Similar	% Decrease	%18/19 change
Castles/forts	(62)	32	48	19	+6
Gardens	(45)	47	36	18	+3
Historic houses	(89)	35	46	19	+8
Historic monuments	(40)	23	50	28	-4
Visitor/heritage centres	(57)	32	60	9	+10
Places of worship	(25)	24	68	8	+6
Other historic sites	(43)	23	60	16	-2
TOTAL HISTORIC	**(361)**	**32**	**51**	**17**	**+5**
TOTAL ATTRACTIONS	**(807)**	**32**	**51**	**17**	**+4**

Table A.17 below examines the gross revenue trends of historic sites within each Government Office Region.

Table A.17   Gross Revenue Trend at Historic Sites 2018-2019 – by GOR

	Sample	% Increase	% Similar	% Decrease	% 18/19 change
North East	(29)	21	66	14	+5
North West	(32)	9	81	9	0
Yorkshire and The Humber	(38)	39	47	13	+13
East Midlands	(37)	27	46	27	-1
West Midlands	(35)	23	57	20	+1
East	(48)	27	48	25	0
London	(21)	38	62	-	+16
South East	(58)	31	55	14	+7
South West	(63)	54	25	21	+5
TOTAL HISTORIC	**(361)**	**32**	**51**	**17**	**+5**
TOTAL ATTRACTIONS	**(807)**	**32**	**51**	**17**	**+4**

2.8   School and Educational Visits to Historic Sites

Sites were asked to record the number of schoolchildren visiting their site in 2019. Table A.18 below illustrates results for the 337 attractions with visiting school children who responded to the question:

- The average number of school children visiting each category type e.g. those castles / forts open to school children visits attracted an average of 4,400 school children visits in 2019. Across all historic attractions open to school visits, an average of 3,700 school children visits were made;

- However, this average is skewed by a small number of large attractions with very high numbers of school children visits. A better reflection of a 'typical' number of school children visits to an average attraction might be generated by the median number of visits i.e. If all attractions were ordered in terms of their school children visit numbers, how many school children visits does the attraction that falls exactly at the midpoint in this ordering attract?

- Total school children visits within each attraction category reflects the total number of school children visits to attractions responding to this question;

- The percentage change in school children visits examines those attractions responding to this question in both 2018 and 2019 and looks at the overall change in school children visits for these attractions e.g. the number of school children visits to castles responding in both 2018 and 2019 decreased by 6%.

Table A.18   School Children Visits to Historic Sites – by Site Type

	Sample	Average no. of school children visits	Median no. of school children visits	Total school children visits	% Change 18/19
Castles/forts	(66)	3,400	1,000	222,000	-6
Gardens	(43)	2,600	100	110,000	+6
Historic houses	(86)	3,700	400	321,000	+6
Historic monuments	(34)	4,600	400	155,000	+5
Visitor/heritage centres	(49)	4,800	200	233,000	+8
Places of worship	(25)	6,300	800	156,000	+3
Other historic sites	(34)	1,600	200	55,000	+16
TOTAL HISTORIC	**(337)**	**3,700**	**400**	**1,252,000**	**+4**
TOTAL ATTRACTIONS	**(809)**	**4,400**	**500**	**3,579,000**	**-5**

Table A.19 illustrates both the average and total numbers of schoolchildren visiting each region among the 337 attractions with visiting schoolchildren answering the question.

Table A.19   School Children Visits to Historic Sites – by Region

	Sample	Average no. of school children visits	Median no. of school children visits	Total school children visits	% Change 18/19
North East	(29)	1,800	400	51,000	+4
North West	(29)	2,400	400	69,000	+4
Yorkshire and The Humber	(32)	3,200	400	102,000	-1
East Midlands	(26)	1,900	200	50,000	0
West Midlands	(46)	2,600	700	117,000	+12
East	(39)	4,300	400	166,000	+6
London	(20)	8,600	1400	172,000	+13
South East	(57)	6,400	400	366,000	+2
South West	(59)	2,700	500	158,000	-8
TOTAL HISTORIC	**(337)**	**3700**	**400**	**1,252,000**	**+4**
TOTAL ATTRACTIONS	**(809)**	**4,400**	**500**	**3,579,000**	**-5**

2.9   Expenditure on Marketing by Historic Sites

Table A.20 examines the movement in marketing spend at historic sites between 2018 and 2019. Attractions were asked to indicate whether spend had increased, decreased or remained similar compared with 2018.

Table A.20   Movement in Spend on Marketing at Historic Sites 2018-2019

	Sample	% Increase	% Similar	% Decrease
Castles/forts	(68)	4	90	6
Gardens	(52)	33	54	13
Historic houses	(104)	10	83	8
Historic monuments	(43)	2	98	-
Visitor/heritage centres	(61)	13	80	7
Places of worship	(28)	11	79	11
Other historic sites	(51)	22	71	8
TOTAL HISTORIC	**(407)**	**13**	**80**	**7**
TOTAL ATTRACTIONS	**(923)**	**15**	**74**	**11**

Table A.21 shows the trends in marketing expenditure since 2008-09.

Table A.21   Trends in Marketing Spend by Historic Sites

	% Up	% Down
2008-09	19	7
2009-10	16	9
2010-11	16	10
2011-12	16	15
2012-13	15	10
2013-14	13	8
2014-15	17	7
2015-16	17	10
2016-17	14	10
2017-18	11	9
2018-19	13	7

2.10 Provision of Digital Communications by Historic Sites

Attractions taking part in the 2019 survey were asked about the digital communications that they provided.

Table A.22   Provision of Digital Communications in 2019 by Attraction Category (%)

Category	Castles/ forts[1]	Gardens	Historic houses	Historic monuments[1]	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total Attractions
Sample	(70)	(56)	(109)	(44)	(62)	(30)	(51)	(422)	(969)
ANY (*excl. website/ online booking)	100	95	92	95	82	77	76	90	90
Website*	100	98	99	98	95	93	92	97	96
Facebook page	99	88	87	95	82	77	73	87	87
Twitter account	96	73	80	93	50	53	57	74	67
E-newsletters	86	55	69	91	31	33	18	58	51
Instagram/Pinterest	93	75	75	86	42	40	41	68	57
Online booking*	80	34	50	84	24	7	20	46	37
YouTube	24	36	52	30	29	30	20	34	33
Online blogs	79	21	41	82	23	17	12	41	36
Mobile apps	76	16	31	73	5	-	8	32	17

Mobile website	1	13	6	9	-	7	8	6	8
Other social media	77	7	29	77	6	7	12	32	20

[1] *EH accounts for most castles/forts/monuments*

2.11 Access to site via public transport

Attractions taking part in the 2019 survey were also asked about whether their site can be accessed via public transport.

Table A.23 Access to site via public transport by attraction category (%)

This table shows whether their site can be accessed via public transport by attraction category.

	Sample	% Yes can be accessed	% No cannot be accessed
Castles/forts	(71)	87	13
Gardens	(57)	65	35
Historic houses	(109)	67	33
Historic monuments	(44)	91	9
Visitor/heritage centres	(61)	77	23
Places of worship	(30)	90	10
Other historic sites	(53)	83	17
TOTAL HISTORIC	**(425)**	**78**	**22**
TOTAL ATTRACTIONS	**(964)**	**79**	**21**

Table A.24 Access to site via public transport by GOR (%)

This table shows whether their site can be accessed via public transport by GOR.

	Sample	% Yes can be accessed	% No cannot be accessed
North East	(32)	88	13
North West	(34)	71	29
Yorkshire and The Humber	(42)	88	12
East Midlands	(39)	69	31
West Midlands	(50)	74	26
East	(54)	70	30
London	(25)	100	-
South East	(73)	79	21
South West	(76)	74	26
TOTAL HISTORIC	**(425)**	**78**	**22**
TOTAL ATTRACTIONS	**(964)**	**79**	**21**

Table A.25 Nature of access to site via public transport by attraction category (%)

Amongst the sites that do offer access via public transport, they were asked to give detail on how frequent such transport is to their site. This table shows the detail by attraction category.

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total Attractions
Sample	(14)	(37)	(53)	(12)	(47)	(27)	(41)	(231)	(665)
Frequent *(regular trains or buses)*	79	62	70	50	55	74	66	65	68
Very close *(trains or buses stop at the attraction entrance)*	50	38	47	50	36	44	27	40	42
Via private shuttlebus *(from local public transport stop)*	-	-	2	-	4	-	2	2	2
Flexible *(there are multiple ways to access the site using public transport)*	29	16	21	25	19	52	29	26	27
None of these	-	5	8	17	15	4	17	10	10

Table A.26   Nature of access to site via public transport by GOR (%)

Amongst the sites that do offer access via public transport, they were asked to give detail on how frequent such transport is to their site. This table shows the detail by GOR.

Category	N.E.	N.W.	Y&H	E.M.	W.M.	EAST	LON	S.E.	S.W.	Total Historic	Total Attractions
Sample	(15)	(20)	(23)	(18)	(28)	(28)	(16)	(44)	(39)	(231)	(665)
Frequent *(regular trains or buses)*	87	80	70	61	61	61	88	66	44	65	68
Very close *(trains or buses stop at the attraction entrance)*	33	40	39	44	61	43	63	20	36	40	42
Via private shuttlebus *(from local public transport stop)*	-	-	-	-	-	-	13	2	3	2	2

Flexible *(there are multiple ways to access the site using public transport)*	20	25	22	17	25	21	75	18	26	26	27
None of these	-	-	13	6	4	7	6	16	21	10	10

2.12 Demographics

Attractions taking part in the 2019 survey were also asked about the demographic data that they collect.

Note: The figures shown for demographics are the average proportion of visitors at a site level (i.e. each site is given the same weighting). As the volume of visits to different sites varies, the proportion of different age groups across all attractions in the total market may differ from this.

Table A.27   Proportion of visitors that fall into age categories (%)

Amongst the sites that do collect demographic data, table A.27 details the mean proportion that fall into each age group, comparing historic attractions to all attractions.

	Historic attractions (mean proportion that fall into age group)	**All Attractions** (mean proportion that fall into age group)
Sample	(62)	(155)
Under 25	22	23
25-34 years	11	11
35-44 years	14	13
45-54 years	16	14
55-64 years	31	23
65 years or older	25	24

Table A.28   Proportion of visitors that fall into ethnic groups (%)

Amongst the sites that do collect demographic data, table A.28 details the mean proportion that fall into each ethnic group, comparing historic attractions to all attractions.

	Historic attractions (mean proportion that fall into ethnic group)	**All Attractions** (mean proportion that fall into ethnic group)

Sample	(101)	(287)
White British	81	83
White non British	9	8
Black, Asian or Mixed	7	7

Table A.29   Proportion of visitors coming from geographic regions across the world (%)

Amongst the sites that do collect demographic data, table A.29 details the mean proportion of visitors that come from geographic regions across the world, comparing historic attractions to all attractions.

	Historic attractions (mean proportion that come from each region)	All Attractions (mean proportion that come from each region)
Sample	(101)	(287)
United Kingdom	83	86
Rest of Europe	5	6
North America	3	3
South America	1	1
Africa	0	0
Asia	1	1
Australasia & Oceania	1	1

3. Appendix

As responding historic sites tend to vary between years, operators are asked in each survey year to provide the number of visits for both the survey year and the previous year. This enables the trend between any two years to be calculated based on the same historic sites.

Table A.24 shows the indexed trend based on the visits (see Table A.26) given by responding historic sites. Because the number of responding historic sites differs each year (see Table A.25), the percentage change between any two years is applied each time to the previous year's index to take account of the varying sample sizes each year.

A base index of 100 was set in 1989, both overall and for each attraction category. The table shows percentage increases year-on-year from that point onwards. For example, visits to castles / forts increased by +3% between 1989 and 1990 (among the sample of castles / forts responding in both 1989 and 1990), therefore increasing the index from 100 to 103. The following year, visits to castles / forts decreased by -7% (among the sample of castles / forts responding in both 1990 and 1991), therefore bringing the index down from 103 to 96.

In this way, long term trends within each category can be established by comparing any individual year with any other year. Basing these indices on pairs of years rather than a constant sample over many years is a better reflection of the actual state of the industry, since this method constantly takes into account the opening of new attractions and the closing of old ones and ensures that base sizes for each year are kept at a robust level.

Table A.24   Index – By Historic Site Category

Data Year	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total historic	Total attractions
1989	100	100	100	100	100	100	100	100	**100**
1990	103	105	100	102	103	103	101	102	**102**
1991	96	104	100	98	112	95	105	99	**102**
1992	99	104	99	99	124	97	100	100	**103**
1993	102	111	100	101	132	96	102	102	**104**
1994	106	113	99	99	134	97	97	103	**106**
1995	111	122	103	99	142	90	102	104	**107**
1996	113	121	105	103	151	94	97	107	**108**
1997	113	121	105	108	141	89	97	105	**106**
1998	115	112	102	107	140	87	95	103	**104**
1999	111	118	105	108	148	72	95	100	**104**
2000	106	115	100	108	140	70	90	96	**103**

2001	98	132	94	86	130	66	93	92	**100**
2002	99	154	107	98	143	66	93	99	**109**
2003	102	162	113	97	152	62	99	102	**112**
2004	103	151	111	96	156	63	106	101	**113**
2005	98	163	109	94	162	65	110	102	**113**
2006	99	159	110	96	163	67	121	104	**117**
2007	97	167	113	124	182	67	117	106	**120**
2008	97	170	113	124	193	71	121	108	**123**
2009	108	186	127	134	202	75	122	117	**129**
2010	103	177	129	136	197	78	158	119	**133**
2011	108	193	138	147	202	83	175	127	**137**
2012	100	189	132	144	198	81	177	123	**136**
2013	111	193	139	162	211	91	193	132	**142**
2014	118	203	146	170	232	86	195	136	**148**
2015	115	217	151	177	240	86	197	139	**150**
2016	117	235	164	180	236	79	192	144	**153**
2017	122	241	171	195	246	82	206	150	**155**
2018	120	243	170	191	236	85	211	149	**158**
2019	120	267	180	201	238	91	215	156	**163**

Table A.25 shows the number of responding historic sites in each survey year. Each site is asked to provide visits figures for both the survey year and the previous year in order to enable visits trends to be calculated based on the same sites. Numbers below show the number of historic sites who responded in 2019.

Table A.25   Number of Responding Historic Sites Providing Visits Figures 1989-2019

Data Year	Castle/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total England historic sites
1990	92	102	272	58	35	31	79	669
1991	94	118	288	59	44	29	83	715
1992	93	120	291	62	51	38	73	728
1993	94	125	305	59	67	43	73	766
1994	100	136	327	62	93	47	88	853

1995	102	148	337	61	104	47	97	896
1996	106	157	340	61	104	51	106	925
1997	104	158	351	57	112	49	102	935
1998	111	178	398	70	137	53	130	1,077
1999	110	179	405	73	148	60	133	1,108
2000	105	164	397	63	115	61	112	1,017
2001	103	158	367	68	114	87	108	1,005
2002	91	107	270	57	63	71	73	734
2003	92	124	302	60	78	74	86	817
2004	79	130	315	63	87	92	86	852
2005	89	137	294	56	76	94	86	832
2006	86	108	287	53	73	93	82	782
2007	73	93	217	2	46	88	79	598
2008	80	114	255	47	74	103	83	756
2009	82	106	260	51	75	103	60	737
2010	90	103	246	48	75	113	79	754
2011	92	101	260	52	81	94	59	739
2012	90	85	231	49	78	58	70	661
2013	91	88	252	55	71	74	74	705
2014	91	97	261	50	88	50	66	724
2015	86	85	260	54	88	51	69	693
2016	86	82	268	52	90	66	81	725
2017	83	88	259	56	82	61	64	693
2018	82	89	272	53	81	54	94	725
2019	81	91	255	52	70	34	91	674

Table A.26 shows the number of visits to responding historic sites. (Note: it does not include estimates of non-responding sites. Therefore these figures do not represent the total market).

Table A.26   Number of Visits to Responding England Historic Sites 1989-2019 (Millions)

Survey Year	Data Year	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total England historic sites
	1989	8.9	4.9	12.0	3.6	2.7	13.6	2.7	48.4
1990	1990	9.2	5.1	12.0	3.7	2.8	14.0	2.7	49.5
	1990	9.3	5.3	12.4	3.7	2.8	14.7	3.0	51.1
1991	1991	8.6	5.2	12.5	3.6	3.0	13.6	3.2	49.6
	1991	8.3	6.1	12.5	3.4	3.1	17.3	3.0	53.6
1992	1992	8.6	6.0	12.3	3.5	3.4	17.8	2.9	54.4
	1992	8.8	6.3	12.6	3.4	4.7	18.2	3.0	57.1

1993	1993	9.1	6.8	12.7	3.5	5.0	18.0	3.1	58.1
	1993	9.3	7.4	13.0	3.5	6.4	18.3	3.5	61.4
1994	1994	9.6	7.5	13.0	3.4	6.5	18.5	3.3	61.8
	1994	9.6	7.8	13.1	3.5	6.9	18.8	3.3	63.1
1995	1995	10.1	8.4	13.7	3.5	7.3	17.4	3.5	64.0
	1995	10.2	8.4	14.2	3.4	7.6	17.7	3.4	65.0
1996	1996	10.5	8.3	14.4	3.6	8.1	18.4	3.2	66.5
	1996	10.6	8.3	14.8	3.1	9.1	18.2	3.2	67.4
1997	1997	10.6	8.4	14.9	3.3	8.5	17.4	3.2	66.2
	1997	10.8	9.5	14.7	3.4	9.6	17.5	3.5	69.0
1998	1998	11.0	8.8	14.2	3.4	9.5	17.1	3.4	67.4
	1998	10.9	9.0	15.3	3.7	9.8	17.7	3.6	70.0
1999	1999	10.5	9.5	15.9	3.7	10.4	14.6	3.5	68.2
	1999	10.2	9.2	16.1	3.3	9.1	14.7	3.4	66.2
2000	2000	9.9	9.0	15.4	3.3	8.5	14.3	3.3	63.6
	2000	9.8	8.5	15.5	4.5	8.3	14.9	2.5	64.3
2001	2001	9.0	10.2	14.5	3.5	7.7	14.2	2.6	61.8
	2001	8.6	8.2	13.2	3.4	4.6	11.4	2.1	51.5
2002	2002	8.7	9.5	15.0	3.9	5.1	11.3	2.1	55.5
	2002	8.7	9.8	15.3	4.1	5.6	11.4	2.5	57.4
2003	2003	8.9	10.3	16.3	4.0	5.9	10.8	2.7	58.9
	2003	7.2	11.4	17.3	3.1	5.7	9.5	2.6	56.7
2004	2004	7.3	10.6	17.0	3.1	5.8	9.6	2.8	56.2
	2004	7.1	9.0	16.5	3.0	5.0	9.4	3.0	53.0
2005	2005	6.7	9.7	16.3	3.0	5.2	9.7	3.1	53.7
	2005	4.4	8.9	18.9	3.2	4.1	10.6	8.5	58.6
2006	2006	4.5	8.7	19.1	3.3	4.1	10.9	9.4	59.9
	2006	6.6	9.4	12.9	-	1.7	8.8	2.7	42.1
2007	2007	6.5	9.9	13.3	-	1.9	8.8	2.6	43.0
	2007	3.6	8.6	12.7	2.3	4.0	6.8	2.6	40.7
2008	2008	3.6	8.7	12.8	2.3	4.3	7.2	2.7	41.6
	2008	4.4	7.0	16.8	2.7	2.4	9.3	3.3	46.0
2009	2009	4.9	7.7	18.9	3.0	2.6	9.8	3.2	50.0
	2009	5.1	9.1	16.7	2.8	3.0	9.1	2.7	48.4
2010	2010	4.9	8.6	17.1	2.9	2.9	9.5	3.5	49.2
	2010	4.5	8.8	22.7	2.7	4.7	9.2	3.4	56.1
2011	2011	4.7	9.6	24.2	2.9	4.8	9.9	3.8	60.0
	2011	7.5	9.4	21.5	3.0	4.4	8.5	4.6	58.9
2012	2012	7.0	9.2	20.7	2.9	4.3	8.3	4.6	57.1
	2012	6.6	9.1	17.6	3.1	4.5	8.1	4.0	52.9
2013	2013	7.3	9.3	18.5	3.4	4.8	9.1	4.3	56.7
	2013	7.3	12.2	20.0	3.4	3.8	10.4	4.7	61.7
2014	2014	7.7	12.7	21.0	3.6	4.1	9.9	4.7	63.7
	2014	7.5	8.9	21.7	3.6	4.0	8.3	5.5	59.5

2015	2015	7.4	9.5	22.6	3,8	4.2	8.3	5.6	61.3
	2015	7.7	10.1	26.2	4.0	7.1	8.7	4.8	68.6
2016	2016	7.9	10.9	28.4	4.0	7.0	8.1	4.7	71.0
	2016	7.4	10.7	28.2	3.8	4.3	8.0	3.8	66.2
2017	2017	7.7	11.0	29.4	4.1	4.5	8.3	4.1	69.2
	2017	7.7	10.7	28.9	5.0	9.9	8.5	4.5	75.3
2018	2018	7.9	10.8	29.2	4.9	9.6	8.8	4.6	75.8
	2018	7.5	10.7	27.6	5.9	5.0	8.1	4.9	69.8
2019	2019	7.6	11.8	29.8	6.4	5.0	8.7	5.2	74.5

Table A.27   Index – By Region
Trends in No. of Visits to England Historic Sites 2000-2019 Indices 2000=100
Constant Samples (From One Year to Next Only)

Data Year	N.E.	N.W.	Y&H	E.M.	W.M.	EAST	LON	S.E.	S.W.	Total England historic sites
2000	100	100	100	100	100	100	100	100	100	100
2001	87	95	86	91	93	95	98	95	92	96
2002	121	110	91	109	96	95	100	100	99	104
2003	138	114	95	115	96	94	103	105	96	107
2004	135	115	98	112	97	87	109	103	92	106
2005	140	123	100	113	103	88	108	106	89	107
2006	140	135	102	114	101	87	115	103	90	109
2007	149	139	103	121	109	84	117	105	90	111
2008	145	143	108	125	118	87	132	104	88	113
2009	160	155	117	132	134	93	138	117	95	123
2010	153	151	118	136	136	96	147	115	98	125
2011	153	158	120	145	148	106	160	127	101	134
2012	142	167	116	142	147	100	154	122	97	130
2013	159	165	120	155	151	108	175	130	101	139
2014	164	185	122	152	160	116	177	125	104	143
2015	171	188	130	167	167	117	169	131	111	147
2016	178	191	132	171	179	125	168	137	118	152
2017	197	201	139	173	186	136	172	142	125	159
2018	195	210	135	172	186	138	170	141	124	158
2019	213	202	144	182	197	146	179	152	130	166

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Table A.28   Index – By Region
Trends in No. of School Children Visits to England Historic Sites 2001-2019 Indices 2001=100

Constant Samples (From One Year to Next Only)

Data Year	N.E.	N.W.	Y&H	E.M.	W.M.	EAST	LON	S.E.	S.W.	Total England historic sites
2001	100	100	100	100	100	100	100	100	100	100
2002	93	113	106	95	102	73	97	97	105	99
2003	96	116	105	86	100	89	117	98	112	104
2004	93	112	90	94	97	102	106	105	123	107
2005	104	111	95	92	105	97	110	107	120	109
2006	85	87	81	109	108	102	98	106	127	106
2007	87	97	79	109	101	103	105	114	126	109
2008	89	109	52	101	129	103	100	113	125	106
2009	77	169	46	98	125	109	153	86	131	103
2010	75	195	64	78	121	113	161	84	133	103
2011	80	206	69	66	143	118	180	80	119	104
2012	66	202	63	69	146	130	173	70	102	96
2013	89	212	71	77	152	140	177	80	105	104
2014	78	216	66	76	146	133	172	80	107	102
2015	78	178	56	79	116	195	165	74	114	99
2016	75	221	53	87	137	175	107	71	103	93
2017	79	200	55	83	113	192	101	69	114	91
2018	78	174	49	70	118	241	94	68	111	89
2019	81	181	49	70	132	253	106	69	102	86

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Table A.29   Index – By Historic Site Category
Trends in No. of School Children Visits to England Historic Sites 2001-2019 Indices 2001=100
Constant Samples (From One Year to Next Only)

Data Year	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total England historic sites
2001	100	100	100	100	100	100	100	100
2002	99	105	117	99	110	79	73	99
2003	98	113	120	107	119	77	93	104
2004	101	116	119	115	100	88	122	107
2005	97	145	119	122	113	87	128	109
2006	95	153	116	123	93	96	131	106
2007	94	167	119	168	94	102	126	109
2008	94	160	111	184	97	95	127	106
2009	81	163	142	172	81	100	88	103
2010	72	186	142	192	89	94	111	103
2011	106	170	113	230	100	101	130	104
2012	92	161	97	207	102	101	126	96
2013	103	166	133	222	100	101	122	104
2014	92	173	122	246	106	104	121	102
2015	90	192	113	248	112	98	109	99
2016	90	197	131	175	114	87	93	93
2017	90	236	115	179	109	86	75	91
2018	88	213	111	172	121	81	72	89
2019	88	226	118	112	131	83	84	86