Visitor Attraction Trends in England 2023

Annual Report for Heritage Counts

Prepared for Historic England

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 2023 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. Most attractions now choose to complete the survey online.

Initial survey invitations were sent out in February 2024, with reminders sent over subsequent months. The survey was closed, and final responses were collated in early April 2024.

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

The questionnaire undergoes an annual review process. The postal version of the questionnaire is confined to two sides of A4 paper, so the majority of questions remain consistent to allow analysis of historical trends. However, there is more flexibility in the online survey where we include additional topical questions. In 2024 this included questions relating to the cost-of-living crisis, the environment and sustainability/ energy efficiency practices and awareness of UK government funding options, and accessibility.

1.4 Sample

The following English visitor attraction subcategories were defined as historic sites:

- Castle/fort
- Garden
- Historic house/house and garden/palace
- Historic monument/archaeological site
- Heritage/visitor centre
- Place of worship
- Other historic site

English Heritage sites account for most castles/ forts and historic monuments/ archaeological sites.

A total of 1432 English visitor sites were open and participated in the survey about attraction performance during 2023. Of these, 673 sites were classified as historic sites, as detailed in Table A.1. Some historic monuments were excluded as they are not physically 'manned', therefore unable to provide visitor numbers.

Table A.1 Response by Attraction Category

	Number of attractions that provided data				
Category	**2023**	**2022**	**2021**	**2020**	**2019**
Castles/forts	84	88	88	81	81
Gardens	78	91	81	76	91
Historic houses	249	230	245	251	255
Historic monuments	47	48	51	55	52
Visitor/heritage centres	86	92	85	71	70
Places of worship	51	49	48	36	34
Other historic sites	78	72	62	83	91
Total	**673**	**670**	**660**	**653**	**674**

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 2023 and 2022. In 2023 there were 622 such historic sites. Previous years comparators: 2022 (594), 2021 (483), 2020 (490), 2019 (586).

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 where a finding 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)*

2. Executive Summary

VISIT VOLUME

Following the significant drop of 59% in admission numbers during the pandemic in 2020, the number of visitors to historic attractions continued to increase for the third consecutive year in 2023, with the sites welcoming 71.75 million visitors, an 11% growth compared to 2022 numbers

Sector growth was fuelled by the return of overseas visitors. According to the International Passenger Survey, the UK welcomed 38 million visits in total during 2023, with visit volume strengthening throughout the year except for a decline in Q4. This increase in inbound tourism in 2023 benefited England's historic attractions, leading to a 76% increase in overseas visits compared with 2022.

The volume of domestic visits remained fairly static at the sector level, with only a 1% increase in domestic visits to historic attractions. However, domestic visits continued to account for the lion's share of visits to historic attractions (75%) in 2023.

School visits also continued to return, with a 29% uplift compared with 2022.

REVENUE & ADMISSIONS PRICING

Gross revenue at historic attractions increased by 10% in 2023 – consistent with the wider attractions sector. However, inflationary increases in staff wages, energy, supplier costs etc. during 2023 will have somewhat offset the higher revenue meaning the impact on profit margins is likely to be more modest.

Adult peak season entrance prices rose by 9% in 2023 to an average price of £10.98. Adult entrance prices typically average from about £9 to £10.50 in the Midlands and the North of England. Prices are higher in the South – between £11 and £12 in the South East and South West, and rising to £16.60 on average in London. The price of child tickets was 56% of the adult ticket price on average (£6.17).

MARKETING & DIGITAL COMMUNICATION

Marketing expenditure increased again in 2023, across all attraction types, with 39% of attractions reporting an increase compared to their marketing budgets in 2022.

Use of social media continues to grow, with 94% of historic attractions using *any social media or apps* in 2023.

Sites typically use 3 forms of social media, with Facebook (90%) being the most commonly used, followed by Instagram/ Pinterest (74%).

IMPACT OF RISING COSTS

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

The impact of rising supplier costs was the most wide-reaching with 70% of historic attractions affected.

Sites are finding it increasingly difficult to absorb these costs, with over a third (35%) passing on cost increases to visitors (e.g. through increased catering prices) compared with 26% in 2022. However, this is less than for the wider attractions market, where 48% passed on cost increases. With many historic attractions having charitable or education objectives, this may have been a conscious decision to minimise cost increases to visitors.

Other cost increases also had an impact, with 68% affected by rising energy costs and 61% by rising wages.

EMPLOYMENT

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

ACCESSIBILITY

63% of historic attractions invested in enhancements to their accessibility provision during 2023. The most common is in staff training, with 55% of sites including this within their training schedule; nearly a fifth made changes to their built environment/ amenities/services (19%) and a similar proportion improved the accessibility of their communications (18%).

SUSTAINABILITY

Historic attractions are becoming more conscious of their environmental responsibilities and 73% said that they have an environmental strategy in place in 2023.

The most common measure that attractions have implemented to date is low energy lighting (84%), followed by adjustable thermostats (72%). Attractions are most likely to be planning the introduction of other renewable electricity or heating, draft proofing / stripping, secondary glazing and smart meters, with around 2 in 5 have already planned these actions.

There is significant future potential for investment in electric charging points for staff / visitors and installation of installing solar panels, with 59% and 51% saying they would consider this, along with encouraging staff / visitors to travel via public transport (46%).

A fifth of historic attractions (21%) invested in energy saving/ carbon reduction during 2023. This was primarily self-financed, with 77% of historic attractions paying for improvements without outside assistance. While the majority of sites who answered the question said they are aware of the government funding available, this is far from universal with two fifths not aware. While it is possible that others within the organisation, who did not contribute to the survey, may know about this funding there remains an opportunity to promote this funding more widely.

3. Context

3.1 Weather Summary

According to MET Office data, 2023 was one of the five warmest years on record for the UK and was also notably wetter than average.

The start of the year was drier, sunnier and slightly milder than usual. England had its driest February since 1993, rainfall was in short supply, particularly in areas to the south and east. Spring 2023 brought into focus the shifting rainfall patterns around the UK, March was very wet in the south, in contrast May was drier than average in the north and west. The Summer months were warmer and wetter than average. June was the warmest summer month – temperatures exceeded 30˚C on five days, making it the hottest June on record in the UK.

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

3.2 Inbound Tourism

Table A.2 shows the volume of visits, volume of nights and total spend by inbound tourists from 2019 to 2023.

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

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

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

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

Table A.2 ONS International Passenger Survey data for 2019-2023

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

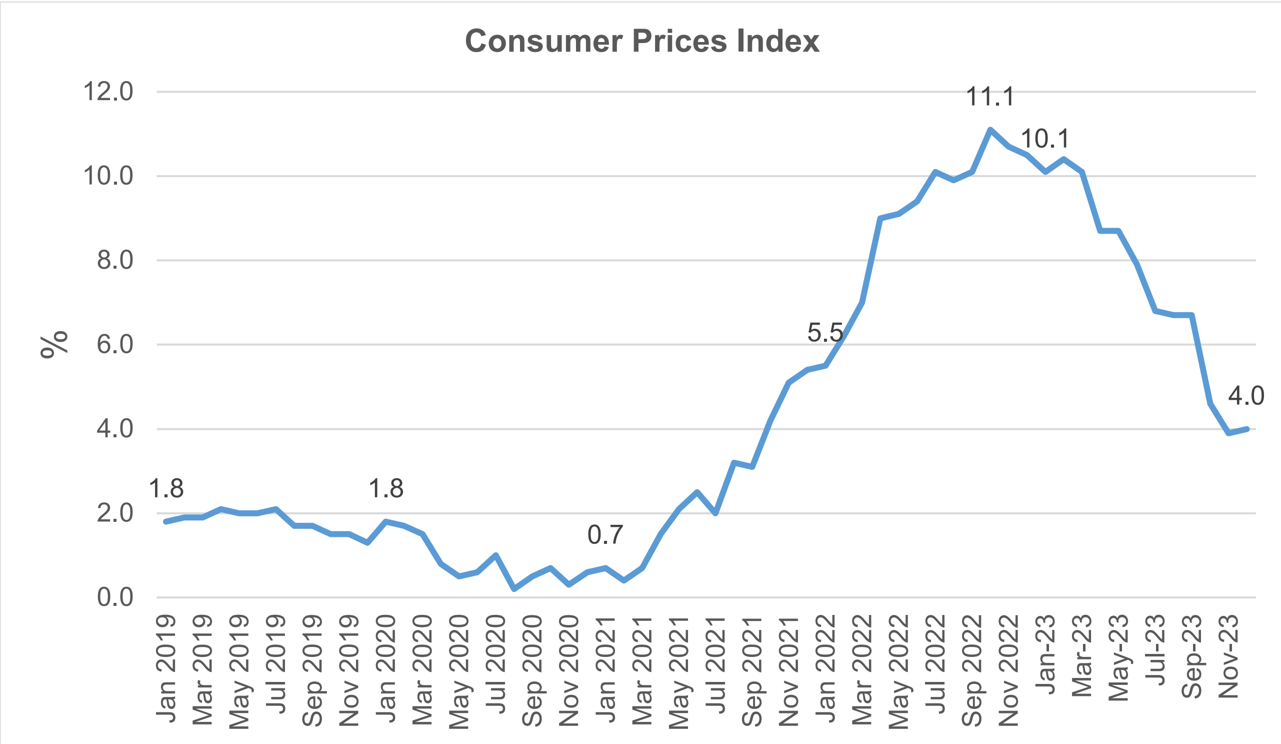
3.3 Cost of living

Chart B.1 illustrates price inflation over time, as measured by the Consumer Prices Index (CPI).

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

This had an impact on how UK consumers felt about their own personal financial situation, measured in VisitBritain's Domestic Sentiment Tracker (Dec 2023). This research showed improved optimism 'that the worst has passed' with regards to the cost-of-living crisis, in the first half of the year, although the majority of consumers remained cautious or continued to struggle financially throughout the year.

Chart B.1 Consumer Prices Index, from 2019-2023



4. Main Tables

4.1 Geographical Distribution of Historic Sites

Table A.3 illustrates the distribution of historic sites by category type within each Government Office Region (GOR).

Over two fifths of historic sites responding to the survey lie in the South of England, mostly based outside of London.

Table A.3 Geographic Distribution of Historic Sites – by GOR

% in each category	TOTAL	N.E	N.W	Y&H	E.M	W.M	East	Lon	S.E	S.W
Castles/forts	12	32	7	20	10	10	5	3	12	15
Gardens	12	10	7	11	4	9	11	5	18	17
Historic houses	37	12	41	30	51	50	29	44	41	31
Historic monuments	7	20	3	13	1	4	11	8	3	8
Visitor/heritage centres	13	12	19	6	25	8	15	5	13	11
Places of worship	8	8	10	15	3	10	6	13	8	4
Other historic sites	12	6	14	6	6	10	24	23	8	13
TOTAL base size	***673***	***50***	***59***	***54***	***71***	***80***	***66***	***39***	***120***	***134***
Total % of attractions	***100***	***7***	***9***	***8***	***11***	***12***	***10***	***6***	***18***	***20***

4.2 Visitor Numbers to Historic Sites

Table A.4a illustrates the number and profile of visits across all historic sites by category type among attractions providing admissions figures for 2023. It is based on all historic sites giving admissions data for 2023. The trend data (% change 22/23) reports the change in visits among attractions that have provided visits figures for both 2022 and 2023.

All historic attraction categories saw an increase in visitor numbers in 2023 when compared against 2022, except for Gardens, which saw a marginal decline of 1%. Castles/ forts reported the highest growth in admissions of 22% – double the average for all historic sites (11%).

Table A.4a Visits to Historic Sites

	Sample	% of sites	% of visits	Average no. of visits	Total visits	% change 22/23
Castles/forts	*83*	13%	12%	103,425	8,584,000	+22
Gardens	*75*	12%	15%	139,077	10,431,000	-1
Historic houses	*239*	37%	38%	112,924	26,989,000	+11
Historic monuments	*44*	7%	7%	121,696	5,355,000	+12
Visitor/heritage centres	*82*	13%	6%	50,382	4,131,000	+14
Places of worship	*50*	8%	14%	204,618	10,231,000	+19
Other historic sites	*72*	11%	8%	83,621	6,021,000	+11
TOTAL HISTORIC	***645***	**100%**	**100%**	**111,227**	**71,741,000**	+11
TOTAL ATTRACTIONS	**1,447**	**100%**	**100%**	**147,566**	**204,526,000**	+11

Table A.4b shows the change in visits to historical attractions over the last 4 years. It is based on attractions providing admissions data in both of the last two years.

Historic attractions are outperforming the wider attractions sector. Admissions to England's historic attractions continued to increase in 2023, but at a slower rate than in the previous two years. Average growth was just 11%, which means that 2023 admissions at historic sites were still 12% short of 2019 levels. However, this compares with a 28% shortfall for the wider attractions sector compared with 2019.

Table A.4b Visits to Historic Sites

	Sample	% change vs. previous year	% difference from 2019
TOTAL ATTRACTIONS 2023	***1334***	+11	-28
TOTAL HISTORIC 2023	***622***	+11	-12
TOTAL HISTORIC 2022	***594***	+35	-21
TOTAL HISTORIC 2021	***483***	+43	-41
TOTAL HISTORIC 2020	***490***	-59	-59
TOTAL HISTORIC 2019	***584***	+5	N/A

Table A.5 examines numbers of visits to historic site types for each Government Office Region.

Across Government regions all historic attractions saw an uplift in visitor numbers compared to the previous year; this is particularly true for attractions in London, who found a 27% uplift in admissions compared with 2022, similar to the growth of London attractions across the wider attractions sector (26%). London was the hardest hit region by the pandemic and its reliance on international visitors meant it was initially slow to recover. Higher than average growth in the last two years means that the region is now consistent with the sector average in terms of admissions levels compared with 2019.

Table A.5 Visits to Historic Sites – by GOR

Visits in 000s	**Total**	**N.E.**	**N.W.**	**Y&H**	**E.M.**	**W.M.**	**East**	**Lon**	**S.E.**	**S.W.**
Castles/forts	8,584	566	135	608	362	475	124	2,792	2,288	1,235
Gardens	10,431	273	526	591	72	244	783	2,032	3,920	1,990
Historic houses	26,989	664	2,386	1,308	2,272	3,402	2,255	4,715	6,063	3,922
Historic monuments	5,355	383	24	293	77	45	1526	135	157	2713
Visitor/heritage centres	4,131	417	72	608	362	376	57	962	604	674
Places of worship	10,231	380	932	940	113	682	1,545	3,788	925	926
Other historic sites	6,021	48	354	459	2	151	934	2,742	68	1,263
TOTAL HISTORIC	**71,741**	**2,732**	**4,429**	**4,808**	**3,260**	**5,375**	**7,225**	**17,167**	**14,025**	**12,722**
Total % of visits	***100***	***4%***	***6%***	***7%***	***5%***	***7%***	***10%***	***24%***	***20%***	***18%***
% change 22/23	***+11***	***+5***	***+4***	***+1***	***+6***	***+12***	***+3***	***+27***	***+9***	***+9***
TOTAL ATTRACTIONS	**204,526**	**10,438**	**27,432**	**13,330**	**9,808**	**12,970**	**15,278**	**56,759**	**36,027**	**22,485**
Total % of visits	***100***	***5%***	***13%***	***7%***	***5%***	***6%***	***7%***	***28%***	***18%***	***11%***
% change 22/23	***+11***	***+7***	***+6***	***+5***	***+8***	***+6***	***+4***	***+26***	***+6***	***+6***

4.3 Origin of Visitors to Historic Sites

Attractions were asked to estimate what proportion of their visits were overseas visitors and what proportion were domestic visitors.

Table A.6 illustrates the year-on-year changes by visitor type, and the latest year versus 2019. Not all sites collect visitor profiling information, so these results are based on a smaller number of attractions (214 for 2023).

According to the International Passenger Survey, the UK welcomed 38 million visits in total during 2023, with visit volume strengthening throughout the year except for a decline in Q4. This increase in inbound tourism in 2023[1] benefited England's historic attractions, leading to a 76% increase in overseas visits compared with 2022.

In contrast, domestic visits to attractions remained fairly consistent (a 1% increase).

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

	Overseas % change	Domestic % 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
2019-20	-92	-45
2020-21	-42	+33
2021-22	+572	+18
2022-23	+76	+1

*Table A.7 illustrates the results within each historic site category. Sample sizes shown are based on all providing data for 2023. Sample sizes are slightly lower than this for the % change data, which is based on sites providing data for both years. Data has been suppressed where the sample size drops below 20 (illustrated by a *).*

[1] According to the International Passenger Survey, inbound tourism increased by 21% between 2022 and 2023, although remained 7% lower than in 2019.

Sample sizes are low, so please treat data for specific attraction categories with caution, but there are significant uplifts in overseas visitors across attraction categories. Overall, a quarter of visits to historic attractions in 2023 were made by overseas visitors. They were particularly important for castles/ forts, which saw the largest uplift in overseas visits. Historic houses are predominantly owned by large membership organisations (English Heritage and The National Trust) which encourages domestic visits, making them less reliant on the overseas market.

Table A.7 Origin of Visitors to Historic Sites

	Sample	% Overseas 2023	% change in overseas visitors 2022/23	% Domestic 2023	% change in domestic visitors 2022/23
Castles/forts	58	38%	+114	62%	-7
Gardens	34	20%	*	80%	*
Historic houses	78	10%	+53	90%	+10
Historic monuments	34	24%	+54	76%	+8
Visitor/heritage centres	56	35%	+59	65%	+5
Places of worship	27	31%	*	69%	*
Other historic sites	32	36%	+31	64%	+4
TOTAL HISTORIC	**319**	**25%**	**+76**	**75%**	**+1**
TOTAL ATTRACTIONS	**728**	**21%**	**+80**	**79%**	**-2**

Tables A.8a/b illustrates the year-on-year changes of overseas visitors and domestic visitors by Government Office Region. The survey asked about 'local/ day trip' rather than all domestic visitors until 2021, so comparative historic data is only available from then for Domestic visitors.

2023 overseas visit data is not available for some regional level analysis due to small sample sizes. However, this shows that the South of England saw particularly strong growth in the overseas audience.

Table A.8a 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
2019-20	**-92**	-92	-90	-90	-96	-97	-91	-88	-93	-97
2020-21	**-42**	*	*	*	*	*	*	*	*	*
2021-22	**+572**	*	*	+493	*	*	*	*	+348	+754
2022-23	**+76**	*	*	+78	+25	*	+16	+78	+88	+117

**Base sizes are too small to report on regions for 2020-21, 2021-22, 2022-23 (below 20)*

Table A.8b shows that while London and the SE were able to grow domestic audiences (by 6% and 4% respectively), the South West and Yorkshire & Humberside reported a decline (of -10% and -5%). For the South West it is likely that this is due to the higher level of staycations in 2022, with more consumers returning to overnight travel in 2023.

Table A.8b Trends of Domestic Visitors to Historic Sites – by GOR

DOMESTIC 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
2021-22	**+18**	+11	*	+13	+12	+3	*	*	+15	+7
2022-23	**+1**	*	*	-5	1	*	0	+6	+4	-10

**Base sizes are too small to report on regions for 2021-22, 2022-23 (below 20)*

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

As we would expect, historic attractions in London reported the highest proportion of international visitors with over two in five visiting from overseas. The South West also saw above average representation of overseas visitors (28%).

Table A.9 Origin of Visitors to Historic Sites – by GOR, 2023

	% Overseas	% Domestic
North East	20	80
North West	6	94
Yorkshire and The Humber	12	88
East Midlands	7	93
West Midlands	4	96
East	13	87
London	42	58
South East	12	88
South West	28	72
TOTAL HISTORIC 2023	**25**	**75**
TOTAL HISTORIC 2022	**17**	**83**
TOTAL HISTORIC 2021	**3**	**97**
TOTAL HISTORIC 2020	**7**	**93**
TOTAL HISTORIC 2019	**23**	**77**

4.4 Family Visits to Historic Sites

Attractions were asked to estimate the proportion of visits accounted for by family groups (i.e. parties with children aged under 18), and whether this was higher, lower or similar to the previous year. Tables A.10a/b illustrate the results within each historic site category and over time.

Table A.10 shows that family visits account for 3 in 10 visits to historic attractions. This is notably higher for Castles/Forts, with 41% of visiting parties estimated to be families.

Table A.10a Family Group Visits to Historic Sites, by Historical Category

	Sample	% Increase	% Similar	% Decrease	Proportion of total visits
Castles/forts	(67)	15	81	4	41%
Gardens	(42)	24	71	5	23%
Historic houses	(103)	21	71	8	24%
Historic monuments	(37)	5	95	-	35%
Visitor/heritage centres	(73)	16	77	7	31%
Places of worship	(32)	28	69	3	21%
Other historic sites	(46)	17	76	7	34%
TOTAL HISTORIC 2022-23	**400**	**18**	**76**	**6**	**30%**
TOTAL ATTRACTIONS 2022-23	**944**	**22**	**72**	**5**	**36%**

The family audience was one of the first to return after the pandemic, with large year on year increases in 2021 and 2022. This continued at a more modest rate in 2023.

Table A.10b Family Group Visits to Historic Sites, over time

	Sample	% Increase	% Similar	% Decrease	Proportion of total visits
TOTAL HISTORIC 2022-23	***(400)***	18	76	6	30%
TOTAL HISTORIC 2021-22	(431)	46	50	4	32%
TOTAL HISTORIC 2020-21	(322)	55	34	11	28%
TOTAL HISTORIC 2019-20	(338)	28	32	40	27%

4.5 Free/Paid Admission to Historic Sites

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

Historic sites are more likely to charge for entry compared with the wider attractions sector, with 77% of sites doing so, compared with 66% of all attractions. Most Castles/Forts, Gardens and Historic houses charge for entry (95%, 97% and 92% representatively), whilst Places of worship Visitors/ Heritage Centres typically offer free entry (78% and 67% respectively).

Table A.11 Free/Paid Admission to Historic Sites, by Historical Category

	% of historic attractions that are free/ paid entry		Volume visits to historic attractions that are free/ paid sites	
	Free sites	**Paid sites**	**Free sites**	**Paid sites**
Castles/forts	5	95	2	98
Gardens	3	97	*	*
Historic houses	8	92	11	89
Historic monuments	18	82	27	73
Visitor/heritage centres	67	33	52	48
Places of worship	78	22	44	56
Other historic sites	30	70	15	85
TOTAL HISTORIC	**23**	**77**	**17**	**83**
TOTAL ATTRACTIONS	**34**	**66**	**47**	**53**

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

We see some variations across different regions. The proportion of attractions charging ranges from 85% in the South West (which has an above average representation of castles/ forts and gardens) to 69% in the North West (which has a higher than average representation of visitor/ heritage centres and places of worship).

Sites that charge an entrance fee tend to attract more visitors. 77% of historic attractions charge for entry, but these sites account for 83% of visitor admissions.

Table A.12 Free/Paid Admission to Historic Sites, by GOR

	% of historic attractions that are free/ paid entry		Volume visits to historic attractions that are free/ paid sites	
	Free sites	Paid sites	Free sites	Paid sites
North East	30	70	32	68
North West	31	69	11	89
Yorkshire and The Humber	24	76	22	78
East Midlands	24	76	6	94
West Midlands	25	75	19	81
East	30	70	40	60
London	23	77	21	79
South East	20	80	5	95
South West	15	85	9	91
TOTAL HISTORIC	**23**	**77**	**17**	**83**
TOTAL ATTRACTIONS	**34**	**66**	**47**	**53**

4.6 Admission Prices to Historic Sites

Table A.13 examines the average admission prices charged by attractions in each historic site category type in 2023. 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.

Average adult admission charges for historic attractions are consistent with the wider sector average for all visitor attractions, but child admission charges are around £1 lower on average at historic attractions. Historic houses command the highest charges of all historic properties, averaging £12.91 for adult entry.

Table A.13 Average Admission Price to Historic Sites (Excludes free attractions)

	Sample (adult paid attractions)	Average adult admission charge	Average child admission charge	Child as % of adult charge
Castles/forts	(70)	£10.50	£6.03	57
Gardens	(48)	£10.41	£5.23	50
Historic houses	(99)	£12.91	£7.10	55
Historic monuments	(33)	£9.89	£5.87	59
Visitor/heritage centres	(24)	£8.49	£5.55	65
Places of worship	(6)	*	*	*
Other historic sites	(31)	£10.05	£5.82	58
TOTAL HISTORIC	**(311)**	**£10.98**	**£6.17**	**56**
TOTAL ATTRACTIONS	**(650)**	**£11.00**	**£7.17**	**65**

**Sample size too low to report*

Table A.14 shows the average admission prices charged by attractions in each region in 2023.

Adult entrance prices typically average from about £9 to £10.50 in the Midlands and the North of England. Prices are higher in the South – between £11 and £12 in the South East and South West, and rising to £16.60 on average in London.

Table A.14 Average Admission Price by GOR (Excludes free attractions)

	Sample (adult paid attractions)	Average adult admission charge	Average child admission charge	Child as % of adult charge
North East	(23)	£9.21	£5.40	59
North West	(22)	£10.30	£5.28	51
Yorkshire and The Humber	(30)	£10.20	£5.91	58
East Midlands	(37)	£10.66	£5.51	52
West Midlands	(36)	£9.81	£5.39	55
East	(27)	£9.86	£6.73	68
London	(18)	£16.60	£8.58	52
South East	(51)	£11.63	£6.85	59
South West	(67)	£11.41	£6.26	55
TOTAL HISTORIC	**(311)**	**£10.98**	**£6.17**	**56**
TOTAL ATTRACTIONS	**(650)**	**£11.00**	**£7.17**	**65**

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

The price increase for adult entry at historic attractions in 2022-23 was in line with the rest of the sector, increasing by 9%. This is slightly lower than the Consumer Price Index inflation rate at the end of 2022 and early 2023 (when inflation was running at around 10%), when most prices would have been set.

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

Historic attractions	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
2019-20	-11
2020-21	+14
2021-22	+5
2022-23	+9
Total attractions 2022-23	+8

4.7 Revenue of Historic Sites

Attractions were asked to indicate whether their gross revenue had increased, decreased, or remained similar to levels seen in 2023. Table A.16 shows results by historic site category type.

In 2023, historic attractions saw a 10% increase in revenue compared with 2022, which is consistent with the wider attractions market. However, there are some notable differences across historic categories - Increases were lower for Visitor/Heritage Centres (+5%) and Gardens (+6%). For Gardens this is explained by the slight reduction in visitor admissions in 2023. Visitor/Heritage Centres are less likely to charge for entry and, when they do so, they charge less than average, which limited the change in revenue, despite an above average increase in visitor admissions.

Table A.16 Gross Revenue Trend at Historic Sites 2022-2023

	Sample	% Increase	% Similar	% Decrease	% change since 22/23
Castles/forts	(73)	37	49	14	+9
Gardens	(46)	43	41	15	+6
Historic houses	(112)	55	31	13	+10
Historic monuments	(41)	44	49	7	+9
Visitor/heritage centres	(78)	40	40	21	+5
Places of worship	(42)	50	33	17	+11
Other historic sites	(49)	57	33	10	+28
TOTAL HISTORIC	**(441)**	**47**	**39**	**14**	**+10**
TOTAL ATTRACTIONS	**(1048)**	**50**	**36**	**14**	**+10**

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

Across the different regions, the greatest increase in revenue for historic sites was in London, where nearly two thirds of sites reported an increase in revenue, averaging a 20% uplift on 2022 gross revenue. Yorkshire and The Humber saw the smallest increase (5%), owing to this region experiencing one of the smallest increases in visitor admissions.

Table A.17 Gross Revenue Trend at Historic Sites 2022-2023 – by GOR

	Sample	% Increase	% Similar	% Decrease	% 22/23 change
North East	(35)	34	54	11	+6
North West	(36)	39	42	19	+9
Yorkshire and The Humber	(41)	46	37	17	+5
East Midlands	(51)	47	33	20	+7
West Midlands	(50)	52	40	8	+19
East	(44)	43	41	16	+17
London	(25)	64	29	8	+20
South East	(73)	52	33	15	+9
South West	(86)	45	42	13	+9
TOTAL HISTORIC	**(441)**	**47**	**39**	**14**	**+10**
TOTAL ATTRACTIONS	**(1048)**	**50**	**36**	**14**	**+10**

4.8 School and Educational Visits to Historic Sites

Sites were asked to record the number of school children visiting their site in 2023. Table A.22 below illustrates results for the attractions with visiting school children who responded to the question.

The (mean) average number of school children visiting historic attractions in 2023 was 2613. However, this average is skewed by a small number of large attractions with very high numbers of school visits. A better reflection of a 'typical' number of school visits to an average attraction is provided by the median number of visits (i.e. the midpoint across all sites when ordered from lowest to highest), which is 334.

The percentage change in school visits examines those attractions responding to this question in both 2022 and 2023, reflecting the overall shift in school visits during this period. Overall, there was a 29% increase in the number of school visits to historic attractions. This is a slightly higher than the 25% increase across the total attractions sector.

Table A.22 School Visits to Historic Sites – by Site Type

	Sample	Average (mean) no. of school children visits	Median no. of school children visiting	Total school children visits across all sites responding in each category	% Change 22/23
Castles/forts	(67)	3780	727	253,000	+40
Gardens	(42)	1975	80	83,000	+8
Historic houses	(103)	2352	319	242,000	+27
Historic monuments	(35)	3292	276	115,000	+49
Visitor/heritage centres	(60)	2253	64	135,000	+3
Places of worship	(36)	2532	973	91,000	+34
Other historic sites	(39)	1998	140	78,000	+25
TOTAL HISTORIC	**(382)**	**2613**	**334**	**998,000**	**+29**
TOTAL ATTRACTIONS	**(924)**	**3341**	**427**	**3,087,000**	**+25**

Table A.23 illustrates both the average and total numbers of schoolchildren visiting each region among the 342 attractions with visiting schoolchildren answering the question.

London and the South East attract the highest number of school visits. However, it was the South West that saw the greatest percentage uplift in school children admissions (up by 50%).

Table A.23 School Visits to Historic Sites – by Region

	Sample	Average (mean) no. of school children visits	Median no. of school children visiting	Total school children visits across all sites responding in each region	% Change 22/23
North East	(24)	1467	576	35,000	+22
North West	(36)	1668	412	60,000	+32
Yorkshire and The Humber	(36)	1511	675	54,000	+31
East Midlands	(46)	669	110	31,000	+19
West Midlands	(45)	2721	411	122,000	+7
East	(41)	2098	300	86,000	+17
London	(20)	10583	2223	212,000	+36
South East	(63)	4058	450	256,000	+27
South West	(71)	1997	200	142,000	+50
TOTAL HISTORIC	**(382)**	**2613**	**334**	**998,000**	**+29**
TOTAL ATTRACTIONS	**(924)**	**3341**	**427**	**3,087,000**	**+25**

4.9 Expenditure on Marketing by Historic Sites

Table A.24 shows the trends in marketing expenditure since 2008-09.

Budget for marketing continues to increase across the sector, after the cuts during the pandemic.

Table A.24 Trends in Marketing Spend by Historic Sites

	% Up	% Down	NET change (% up minus % down)
2008-09	19	7	+12
2009-10	16	9	+7
2010-11	16	10	+6
2011-12	16	15	+1
2012-13	15	10	+5
2013-14	13	8	+5
2014-15	17	7	+10
2015-16	17	10	+7
2016-17	14	10	+4
2017-18	11	9	+2
2018-19	13	7	+6
2019-20	1	84	-83
2020-21	51	15	+36
2021-22	46	5	+41
2022-23	39	8	+31

Table A.25 examines the trends in marketing spend at historic sites between 2022 and 2023. Attractions were asked to indicate whether spend had increased, decreased or remained similar compared with 2022.

Castles and Forts (74%) and Historic Monuments (71%) were the most likely to have increased their marketing budget for 2023, driven by English Heritage attractions.

Table A.25 Movement in Spend on Marketing at Historic Sites 2022-2023

	Sample	% Increase	% Similar	% Decrease	% change
Castles/forts	(74)	74	19	7	+67
Gardens	(46)	24	67	9	+15
Historic houses	(112)	38	50	12	+26
Historic monuments	(41)	71	27	2	+69
Visitor/heritage centres	(75)	19	73	8	+11
Places of worship	(43)	23	77	-	-
Other historic sites	(49)	22	65	12	+10
TOTAL HISTORIC	**(440)**	**39**	**53**	**8**	**+31**
TOTAL ATTRACTIONS	**(1044)**	**31**	**62**	**8**	**+23**

4.10 Provision of Digital Communications by Historic Sites

Attractions were asked about the digital communications that they provided.

Table A.26 shows that the vast majority of historic attractions used some form of social media, with Facebook being the most popular platform, followed by Instagram/ Pinterest. The high level of social media usage for castles/ forts and historic monuments is driven by the dominance of English Heritage sites within these categories.

Table A.26 Provision of Digital Communications in 2023 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	(74)	(51)	(121)	(41)	(77)	(46)	(52)	(462)	(1100)
Facebook page	99	90	91	95	88	78	87	90	91
X (formerly Twitter)	85	47	59	83	45	52	35	58	55
E-newsletters	82	59	60	83	47	57	46	61	58
Instagram/Pinterest	97	88	80	80	61	48	46	74	68
Online booking*	88	69	65	76	39	46	38	61	55
YouTube	78	24	35	78	24	43	23	42	38
Other social media	80	6	29	66	14	15	27	34	23
Mobile apps	74	14	26	66	6	11	10	29	16
TikTok	77	14	27	63	4	7	13	29	22
ANY (*excl. website/ online booking)	100	96	94	95	92	83	90	94	95

4.11 Impact of Rising Costs

Attractions were asked about the impact of rising costs on their attraction in both 2022 and 2023. Table A.27 shows how the impact has changed across the two years.

The majority of attractions (80%) felt some impact of rising costs on their finances, with this affecting more sites in 2023 than it did in 2022.

Table A.27 Impact of rising costs (%)

%	Rising energy costs		Rising supplier costs		Rising wages	
Year	**2023**	**2022**	**2023**	**2022**	**2023**	**2022**
Sample	(332)	(350)	(331)	(346)	(329)	(344)
No Impact/ Not Relevant	32	37	30	32	39	47
Had to increase cost to visitors	25	15	35	26	26	18
Reduced Income for site	47	43	39	36	37	32
Had to remove/ reduce certain services	7	5	10	6	8	4

Table A.28 looks at the impacts of the rising energy costs across the attraction categories.

Two in three historic attractions felt the impact of rising energy costs in 2023 and this resulted in reduced income for nearly half of England's historic attractions. Historic Houses are most likely to feel the impact of rising energy costs (81%).

Table A.28 Impact of rising costs – Rising Energy Costs (%)

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total Attractions
Sample	(22)	(42)	(94)	(14)	(74)	(43)	(43)	(332)	(921)
No Impact/ Not Relevant	23	24	19	*	49	30	42	32	33
Had to increase cost to visitors	23	45	32	*	11	19	21	25	26
Reduced Income for site	55	50	56	*	36	51	37	47	44
Had to remove/ reduce certain services	9	10	5	*	7	9	7	7	7

**Sample size too low to report*

Table A.29 looks at the impacts of the rising supplier costs in the UK across the attraction categories.

Rising Supplier costs are affecting the majority of Historic Attractions (70%), and this has led to a third of attractions needing to increase costs to visitors (35%), rising to 60% of garden attractions.

Table A.29 Impact of rising costs – Rising Supplier Costs (%)

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	All Attractions
Sample	(22)	(43)	(94)	(14)	(74)	(40)	(44)	(331)	(914)
No Impact/ Not Relevant	32	12	24	*	36	35	36	30	29
Had to increase cost to visitors	18	60	39	*	32	20	30	35	34
Reduced Income for site	50	58	40	*	30	40	34	39	40
Had to remove/ reduce certain services	18	14	9	*	9	8	11	10	10

**Sample size too low to report*

Table A.30 looks the impacts of the rising wage costs in the UK across the attraction categories.

Around 3 in 5 historic attractions are feeling some impact from rising wage costs (61%), which has resulted in reduced income for over a third of historic sites (37%). Nearly half of Gardens (49%) and Historic Houses (46%) have responded by increasing their prices to visitors, while other attraction categories are more likely to have absorbed the costs.

Table A.30 Impact of rising costs – Rising Wages (%)

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	All Attractions
Sample	(22)	(43)	(93)	(14)	(73)	(41)	(43)	(329)	(908)
No Impact/ Not Relevant	32	21	22	*	60	41	53	39	42
Had to increase cost to visitors	14	49	34	*	14	17	21	26	25
Reduced Income for site	50	49	46	*	21	41	26	37	34
Had to remove/ reduce certain services	9	9	10	*	11	-	7	8	8

**Sample size too low to report*

4.12 Staffing levels

Attractions were asked a few questions about their staffing level changes compared to those before the pandemic. Tables A.31 shows whether their staffing levels have returned to pre-pandemic levels across the attraction categories.

Around three quarters of historic attractions stated that their staffing levels have returned to pre-pandemic levels (74%). This is most likely at Castles/ Forts and Historic Monuments (92% and 88%) – categories with a high representation of English Heritage properties.

Table A.31 Staffing Levels Recovery by Attraction Category (%)

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	All Attractions
Sample	(75)	(48)	(117)	(40)	(74)	(42)	(48)	(444)	(1070)
Yes	92	79	68	88	59	71	67	74	72
No	8	15	23	8	28	26	25	20	21
Don't know	-	6	9	5	12	2	8	7	7

Table A.32 shows the main reasons why staffing levels have not returned to pre-pandemic levels.

Budgetary limitations are the main reason why staffing levels at some historic attractions have not yet returned to pre-pandemic levels, but there are a variety of other reasons at play too. Many sites are struggling to attract the right candidates for paid roles or volunteers, while others have restructured their operations to reduce the number of staff needed.

Table A.32 Reasons for Staffing Level Shortfalls

%	Total Historic	All Attractions
Sample	(72)	(186)
Budgetary limitations	51	48
Difficulty in attracting the right candidate(s)	25	26
Other	35	35

The most common 'other' reasons are:

- Volunteers not returning
- Restructuring/ more efficient working practices
- Insufficient visitor numbers to warrant recruitment

4.13 Sustainability

Attractions were asked a few questions related to sustainability. Table A.33 shows the proportion of historic attractions having an environmental strategy.

At the time that the survey fieldwork was conducted (Feb-Apr 2024), 73% of historic attractions across England had an environmental business strategy. If we exclude the large membership organisations (English Heritage and The National Trust), this reduces to 57%. However, it was relatively uncommon to have a budget allocated, suggesting that sites may be looking for grants and/or prioritising low cost measures.

Table A.33 Environmental strategy in 2024, by category

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total attractions
Sample	(66)	(28)	(67)	(36)	(38)	(27)	(25)	(287)	(647)
We have a budget to help meet environmental objectives	11	36	19	6	18	22	4	16	17
We have an environmental/ climate strategy	88	57	64	89	58	81	64	73	61
Neither of these	9	25	28	11	34	19	36	22	33

A.34a details which sustainable actions have been completed or would be considered by historic attractions.

The most common measure that attractions have already implemented is low energy lighting (84%), followed by adjustable thermostats (72%). Attractions are most likely to be planning the introduction of other renewable electricity or heating, draft proofing / stripping, secondary glazing and smart meters, with around 2 in 5 having already planned these actions.

There is significant future potential for investment in electric charging points for staff / visitors and installation of installing solar panels, with 59% and 51% saying they would consider this, along with encouraging staff / visitors to travel via public transport (46%).

Table A.34a Actions historic attractions are taking to increase energy efficiency

		2023					2022
	Sample	**Unlikely to implement for other reasons**	**Not possible/ relevant at this site**	**Would consider in the future**	**Already planned implementation**	**Already installed/ implemented**	**Already installed/ implemented**
Low energy lighting	277	<1%	4%	7%	5%	84%	78%
Adjustable thermostats	274	1%	16%	8%	2%	72%	69%
Smart meters	276	6%	14%	16%	37%	28%	19%
Encouraging staff/visitors to travel via public transport	278	6%	17%	46%	9%	22%	27%
Draft proofing/ stripping	272	3%	29%	11%	39%	18%	19%
Other renewable electricity or heating	274	7%	19%	20%	40%	14%	12%
Solar panels	275	8%	28%	51%	4%	10%	10%
Double or triple glazed windows	276	43%	43%	3%	2%	9%	11%
Electric charging points for staff / visitors	278	10%	20%	59%	5%	7%	7%
Secondary glazing	272	9%	40%	9%	38%	4%	5%

A.34b shows measures which attractions have already installed or have clear plans to install in the near future.

The table below shows that Historic attractions are more likely to have adopted many of these sustainability measures than the wider attractions sector. The exceptions are double/ triple glazed windows and solar panels, which may not be permitted at historic sites, and encouraging travel by public transport which may not be possible for sites without good transport links.

Table A.34b Actions historic attractions are taking to increase energy efficiency

Category	Castles / forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total attractions
Sample	(65)	(27)	(65)	(34)	(35)	(24)	(24)	(274)	(647)
Adjustable thermostats	92	59	74	94	57	54	62	74	68
Energy efficient lighting	95	86	91	94	74	84	88	89	86
Draft proofing/ stripping	85	43	59	80	29	21	36	57	47
Double or triple glazed windows	3	34	6	12	9	8	22	11	25
Secondary glazing	83	7	37	74	6	13	18	42	28
Solar panels	7	38	11	6	18	21	8	14	19
Smart meters	86	48	56	92	40	54	56	65	55
Other renewable electricity or heating	81	34	50	80	33	28	22	54	34
Electric charging points for staff/ visitors	4	21	17	3	17	16	8	12	13
Encouraging staff/ visitors to travel via public transport	20	45	37	24	40	25	25	31	39

A.35a shows the proportion of historic attractions that invested in changes to the fabric of their building or specialist equipment to save energy or reduce their carbon footprint in 2023.

Overall, just over a fifth of historic attractions invested in changes to save energy or reduce their carbon footprint in 2023 (21%); this is slightly lower than the average for the wider attractions sector (27%). However, there was significant variation between attraction types. Investment was less common for historic monuments (3%), 'other historic sites' (8%) and castles/ forts (9%) where the nature of the sites may make this less relevant or more difficult to achieve. At the other end of the scale over half of the places of worship included in the survey made these investments.

Table A.35a Investment to reduce carbon footprint in 2023

Category	Castles / forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total attractions
Sample	(65)	(28)	(68)	(35)	(37)	(25)	(24)	(282)	(647)
% investing in changes	9%	36%	26%	3%	24%	52%	8%	21%	27%

A.35b shows how attractions investing in measures to save energy/ reduce their carbon footprint funded these changes.

Measures to reduce attractions' carbon footprint or to save energy were typically self-financed. Only 14% of historic attractions use public funding/ grants, coming from:

- National Lottery Heritage Fund
- Rainwater Harvesting Fund
- Public Body Infrastructure Funding (PBIF)
- NCC
- South Copeland GDF Community Partnership

Table A.35b – Financing of energy saving/ carbon footprint reduction investments

Category	All historic attractions	All attractions
Sample	(57)	(168)
Self-financed	77%	76%
Public funding/ grants	14%	15%
Other sources	9%	9%

A.36 shows the proportion of attractions answering that were aware of the funding options provided by the UK government to support installation of energy saving measures.

Two-fifths of respondents were not aware of the government funding available to support sites investing in energy saving measures. While it is possible that others within the organisation who did not contribute to the survey may know about this funding, there remains an opportunity to promote this funding more widely.

Table A.36 – Awareness of government funding for energy saving measures

Category	All historic attractions	All attractions
Sample	(170)	(490)
% aware of government funding for energy saving measures	60%	58%

4.14 Accessibility provisions

Attractions were asked about accessibility provisions on site. Tables A.37a shows which accessibility provisions have been implemented or would be considered by historic attractions.

Training was the most popular form of improving the visitor experience for people with access needs in 2023, with over half of historic attractions providing this training in the 12 months before responding to the survey (55%). Improving the built environment and marketing/ digital inclusion are likely to be more costly and time-consuming initiatives, which may explain why a lower proportion (just under a fifth) had invested in this within the previous 12 months. But around half of attractions answering have clear plans to invest in these initiatives in the next year, or further ahead.

Table A.37a Actions historic attractions are taking to strengthen accessibility provisions

	Base	Have done in previous 12 months	Clear plans for the next 12 months	Clear plans for further ahead	Are considering, but no firm plans	No plans to consider this at the current time
Improve the built environment, amenities and services for visitors with accessibility requirements	281	19%	10%	40%	17%	15%
Provide staff with specific training on welcoming and interacting with visitors with accessibility requirements	283	55%	8%	4%	17%	16%
Improve the information, marketing and digital inclusion for visitors with accessibility requirements	284	18%	15%	37%	16%	14%

A.37b shows actions which attractions have already done or have clear plans to do this in the next 12 months.

The table below shows that all historic attraction categories are striving to enhance accessibility provisions for visitors. English Heritage attractions are driving the high staff training levels seen at Castles/ Forts and Historic Monuments.

Table A.37b Actions historic attractions are taking to strengthen accessibility provisions

Category	Castles / forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total attractions
Sample	(66)	(26)	(65)	(35)	(38)	(27)	(24)	(281)	(633)
Improve the built environment, amenities and services	19	43	32	17	34	37	29	29	36
Provide staff with specific training	94	37	57	89	47	37	38	63	52
Improve the information, marketing and digital inclusion	20	41	31	28	47	52	32	33	41

5. 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.38 shows the indexed trend based on the visits given by responding historic sites. Because the number of responding historic sites differs each year (see Table A.39), 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 ensuring that base sizes for each year are kept at a robust level.

Table A.38 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**
2020	35	160	85	50	81	25	58	62	**57**
2021	58	224	122	65	118	37	81	89	**74**
2022	95	240	150	108	176	80	126	120	**105**
2023	116	238	166	121	200	95	140	134	**116**

Table A.39 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, but not all sites provide this, so the base size for trends comparisons are lower than the total sample sizes shown below.

Table A.39 Number of Responding Historic Sites Providing Visits Figures for the previous year

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
2020	81	76	251	55	71	36	83	653
2021	88	81	245	51	85	48	62	660
2022	88	91	230	48	92	49	72	670
2023	84	78	249	47	86	51	78	673

Table A.40 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.40 Number of Visits to Responding England Historic Sites (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
	2019	8.5	11.3	28.3	5.2	3.3	10.7	5.9	73.2
2020	2020	2.5	6.9	13.3	1.5	1.5	2.9	1.6	30.2
	2020	**2.4**	**7.8**	**13.3**	**2.4**	**1.8**	**1.8**	**1.2**	**30.7**
2021	2021	**3.9**	**10.9**	**20.0**	**3.0**	**2.6**	**2.7**	**1.7**	**43.9**
	2021	**4.8**	**12.2**	**17.9**	**3.2**	**2.4**	**2.8**	**2.6**	**46.1**
2022	2022	**8.1**	**13.2**	**22.3**	**5.4**	**3.7**	**6.4**	**4.1**	**63.2**
	2022	**6.9**	**10.3**	**24.3**	**4.8**	**3.6**	**8.0**	**5.4**	**63.3**
2023	2023	**8.4**	**10.3**	**26.8**	**5.4**	**4.1**	**9.5**	**6.0**	**70.5**

Table A.41 Index – By Region

Trends in No. of Visits to England Historic Sites Indices 2000=100 Constant Samples (From One Year to Next Only)

Data Year	North East	North West	Yorks & Humber	East Mids	West Mids	East	London	South East	South West	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
2020	77	107	63	87	95	92	41	74	49	66
2021	114	159	103	133	134	125	57	99	74	94
2022	154	194	128	178	165	140	68	217	90	120
2023	162	202	129	189	185	144	86	237	98	133

Table A.42 Index – By Region
Trends in No. of School Visits to England Historic Sites Indices 2001=100
Constant Samples (From One Year to Next Only)

Data Year	North East	North West	Yorks & Humber	East Mids	West Mids	East	London	South East	South West	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
2020	7	31	5	11	20	30	16	14	12	13
2021	19	44	5	24	34	35	22	20	15	19
2022	52	97	11	82	81	161	64	90	35	55
2023	63	128	14	98	87	188	87	114	52	71

Table A.43 Index – By Historic Site Category
Trends in No. of School Visits to England Historic Sites 2001-2022 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
2020	8	63	12	11	25	29	8	13
2021	8	142	18	22	27	40	6	19
2022	32	180	50	48	90	115	16	55
2023	45	194	64	72	93	154	20	71