England Attractions Monitor

Quarter 1 Report

January - March 2010

Prepared for

VisitEngland

by

bdrc continental

1. INTRODUCTION

In January 2006, VisitBritain commissioned BDRC to launch and manage the England Attractions Monitor, an online panel to help provide the attractions industry with rapid feedback on current trends in visits to attractions in England. The survey was enhanced in 2007 to incorporate not only recent visit trends but also questions relating to business confidence for the forthcoming quarter.

A further enhancement in 2008 saw the introduction of a quarterly **'hot topic' question** which, during Quarters 2, 3 and 4 of 2008 and Quarter 1 of 2009, asked attractions what overall impact, if any, they thought the current economic slowdown and credit crunch would have on visitor numbers. From Quarter 2 of 2009, this 'hot topic' question was changed with the objective of providing more detailed feedback on the impact of the economic situation on visitor profile and expenditure at attractions. Section 8 provides the details.

Quarter 1 2010 also retains the questions introduced in Quarter 2 2009, to measure the impact of **public events and membership/friends schemes** on the business performance of attractions. Section 7 provides the detailed results.

2009 also saw a significant extension in the scale of the monitor, aiming to increase the number of participating attractions by a further 100 per quarter, thereby increasing the robustness of sample sizes at a regional level. Details of methodology and sample sizes achieved are provided in Section 2.

2. METHODOLOGY

The objective for 2009 and beyond was to create an enhanced, committed panel of **c.600 attractions** comprising:

- c.300 individual attractions recruited online and by telephone (c.30-35 per England region);
- c.300 English Heritage/National Trust properties (with visit admissions data for each property provided centrally).

Regional Tourism Organisations also have the opportunity to enhance the survey within their region by boosting sample sizes to enable them to analyse their own results in greater detail. There is also the facility for regions to add bespoke questions.

During the first 2010 quarterly period (January – March) - **628 attractions** provided data (English Heritage/National Trust properties provide visit numbers only), consisting of:

- **336 individual attractions recruited online;**
- **292 English Heritage/National Trust properties (admissions data only).**

The number of individual attractions taking part has increased significantly in the past year from just 148 in Quarter 4 2008, broadening the coverage of different attraction types within the monitor and providing a more robust basis for the business confidence and 'hot topic' elements of the survey. The significant increase in participation was driven by a modified approach to recruitment in 2009 which made greater use of the annual Survey of Visits to Visitor Attractions as a recruitment vehicle (which now also includes an option for online survey completion).

A cross-section of attractions was recruited according to type, size and free/paid admission. Comparisons in visitor admissions figures are always made among constant samples where appropriate.

3. SUMMARY OF FINDINGS

This is a summary of the findings for the Q1 (January to March 2010) period.

By way of context, the weather during Q1 was extremely cold for the first two months and mixed in March. The first half of January was very cold with widespread snowfalls and some sharp frosts. After mid-month, temperatures rose to around normal before a return to colder conditions at month end. February was generally cold with only a few brief milder interludes, mainly in the west and south. There were some sharp frosts and snowfalls. March was a month of two halves with the first two weeks generally dry and fine, although it was rather cold with some night frosts. The second half saw more changeable weather with rain at times.

Following a highly positive period of year-on-year growth in visitor admissions between Spring and October 2009, the decline in visits noted in November (-5%) and December (-1%) 2009 has continued into the first quarter of 2010 (-3% across the Jan-Mar period overall). With the extreme cold weather, visits in each of January (-11%) and February (-6%) suffered. However, there was an encouraging recovery in March (+3%).

Outdoor attractions suffered most during the quarter, with London attractions and museums/art galleries and historic houses/castles holding up the best.

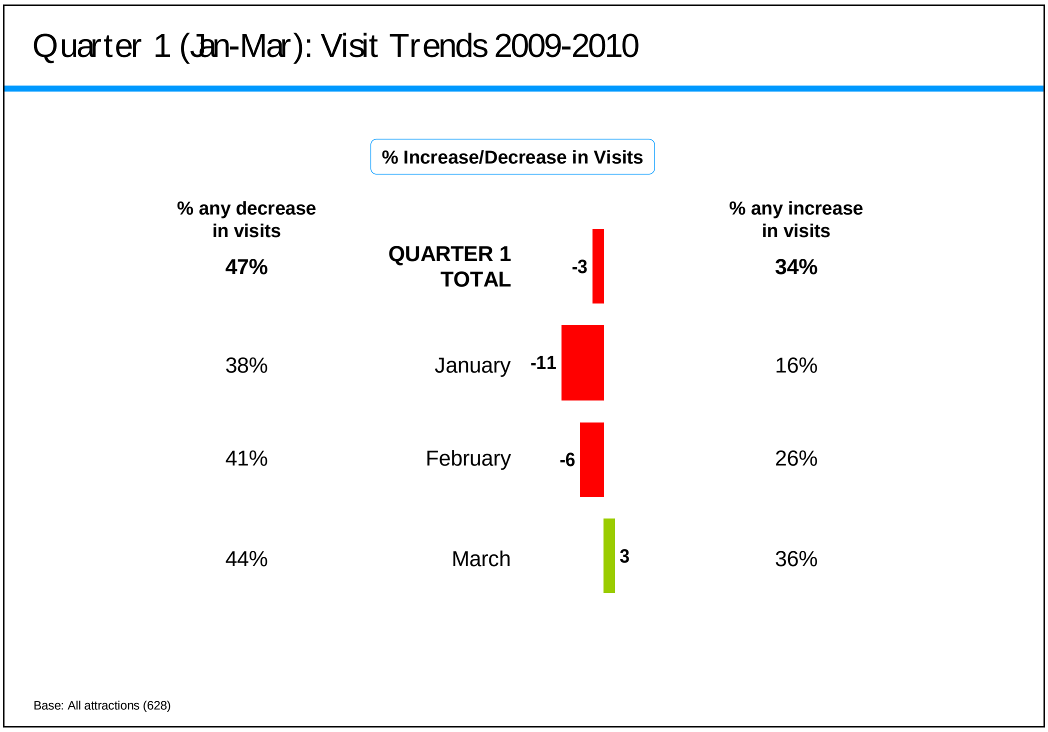
With many attractions delivering strong business performance in 2009, there is perhaps a feeling that it will be a challenge for 2010 to exceed this position. Business confidence reflects this with a softening of confidence for exceeding their 2009 performance (36% felt more optimistic than at the same point in 2009 compared with 51% at the same time last year).

The primary reason for positive business confidence remains investment in events, exhibitions or site improvements. The trend for focussing upon existing operations would appear to be continuing in 2010.

However, there was also a feeling of uncertainty among the industry during the January to March period, not least driven by the upcoming General Election and the related uncertainty surrounding economic conditions. Whilst there was an overall feeling that the age of the ‘staycation’ would continue in 2010, there was also a feeling that a clear message needed to be provided by government to reassure the industry in 2010.

4. VISIT TRENDS - Quarter 1 (Jan-Mar) 2009/10

The chart below illustrates the percentage change in visitor admissions between Q1 2009 and Q1 2010 among the 628 attractions taking part in the survey. It also identifies the proportion of attractions recording an overall increase and decrease in admissions.



Following the general downturn for the industry observed throughout 2008 and into the first quarter of 2009 and the notable recovery observed during the rest of 2009, (Q2 +15% year-on-year, Q3 +5%, Q4 +4%), Q1 2010 has seen an overall decrease of -3%. January was a particularly poor month reporting a -11% year-on-year decrease in visits. The prolonged winter weather in the first two months of the year goes someway to explaining this decline.

The following charts illustrate how visitor admissions trends for Q1 vary by region, attraction category, size of attraction, location of attraction (coastal, rural or urban) and paid/free entry.

Quarter 1 (Jan-Mar): Visit Trends 2009-2010– By Region

Region	Total Qtr 1 Change (%)	Jan Change (%)	Feb Change (%)	Mar Change (%)
TOTAL ENGLAND (628)	**-3**	**-11**	**-6**	**6**
North East (52)	2	-17	10	0
North West (70)	-2	-18	<1	10
Yorkshire & The Humber (53)	-4	-31	-15	9
East Midlands (57)	-2	-12	-10	7
West Midlands (57)	-7	-7	-11	4
East of England (64)	-2	-15	-23	5
London (40)	3	-3	4	0
South East (113)	-14	-15	-18	4
South West (122)	-8	-19	-3	8

Base: All attractions (628)

All regions apart from North East and London reported a decrease in visitor admissions in Q1 2010, with every region reporting a year-on-year decline in January and most in February. March saw an encouraging recovery for most regions.

Quarter 1 (Jan-Mar): Visit Trends 2009-2010– By Attraction Category

Attraction Category	Total Qtr 1 Change (%)	Jan Change (%)	Feb Change (%)	Mar Change (%)
TOTAL ENGLAND (628)	**-3**	**-11**	**-6**	**6**
Historic Houses/Castles (250)	2	-4	-7	8
Other historic properties (63)	-10	-19	1	-11
Museums/art galleries (119)	1	-7	2	8
Gardens (47)	-14	-7	-19	-13
Visitor/heritage centres (25)*	-17	-56	-13	1
Wildlife attractions/zoos (21)*	-23	-25	-21	-23
Others (103)	-4	-9	-12	+7

*CAUTION: Low base sizes
Base: All attractions (628)

Given the extreme cold weather conditions, outdoor attractions suffered most during this period. Wildlife attractions/zoos (-23%), gardens (-14%) and perhaps more surprisingly, visitor/heritage centres (-17%) suffered the highest year-on-year declines in admissions. Other historic properties (-10%) – primarily outdoor monuments - also experienced year-on-year decreases in visitor admissions across two of the three months of Q1 2010. Admissions to historic houses/castles (+2%) and museums/art galleries (+1%) held up relatively well during the period.

Quarter 1 (Jan-Mar): Visit Trends 2009-2010– By Other Segments

		Total Qtr 4 Change (%)	Jan Change (%)	Feb Change (%)	Mar Change (%)
	TOTAL ENGLAND (628)	**-3**	**-11**	**-6**	**6**
Visits per annum	Over 200,000 (48)	-6	-11	-5	-3
	100,001 – 200,000 (76)	6	-7	-8	22
	50,001 – 100,000 (103)	-3	-8	-4	-1
	20,001 – 50,000 (144)	-10	-21	-7	-7
	20,000 or less (257)	-2	-19	-1	5
Free/paid	Paid (501)	-7	-13	-10	-2
	Free (127)	2	-9	<1	11
Location	Coastal (72)	-13	-24	-11	-11
	Rural (345)	-4	-13	-14	6
	Urban (211)	-2	-9	<1	2

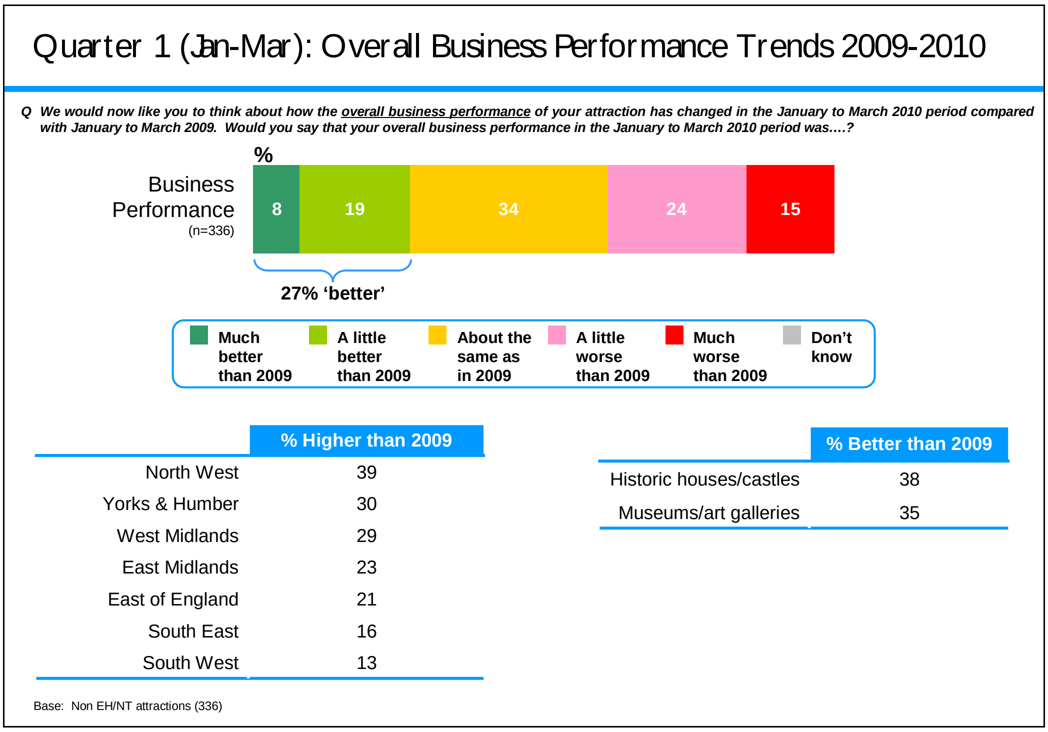
Base: All attractions (628)

This quarter, free attractions (+2%) – with admissions driven by the large, indoor museums/art galleries - fared better than paid attractions (-7%), with the latter reporting falls across each month.

Coastal (-13%) and to some extent, rural (-4%) attractions were hardest hit by the colder weather.

5. BUSINESS PERFORMANCE TRENDS
Quarter 1 (Jan-Mar) 2009/10

In addition to being asked about visitor admissions, attractions were also asked to state how they felt that their business had performed overall during Q1 2010 compared with Q1 2009. The chart below illustrates the proportions of the 336 attractions (excluding English Heritage/National Trust properties) taking part in the survey in Q1 2010 who felt that their business had performed better or worse.



Only 27% of attractions taking part in the survey felt that their business performance was either much better (8%) or a little better (19%) than in Q1 2009. This represents a significant decrease from earlier in 2009 – Q4 2009 (53%), Q3 2009 (63%), Q2 2009 (59%). This proportion is even lower than during 2008, when year-on-year comparables were at their worst – 37% in Q1 2009, 36% in Q4 2008 and 33% in each of Q3 and Q2 2008.

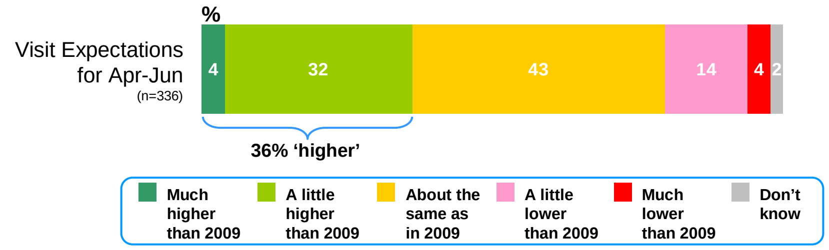
Conversely, the proportion of attractions feeling that their business performance was worsening compared with the equivalent quarter the previous year has significantly increased – 39% compared with 25% in the equivalent Q1 period in 2009. This is even higher than the figures reported at the lowest ebb in 2008 – 29% in Q4 2008, 37% in Q3 2008 and 35% in Q2 2008.

6. BUSINESS CONFIDENCE TRENDS
Quarter 1 (Jan-Mar) 2009/10

The chart below examines attractions' expectations for visitor admissions in Q2 2010 compared with actual visitor admissions recorded in Q2 2009.

Quarter 1 (Jan-Mar): Visit Expectations for Apr-Jun 2010

Q Thinking about the April to June 2010 period, do you expect visitor numbers (paid and free) compared with April to June 2009 to be........?



	% Higher than 2009
West Midlands	42
East of England	41
North West	39
East Midlands	37
Yorks & Humber	33
South East	31
South West	25

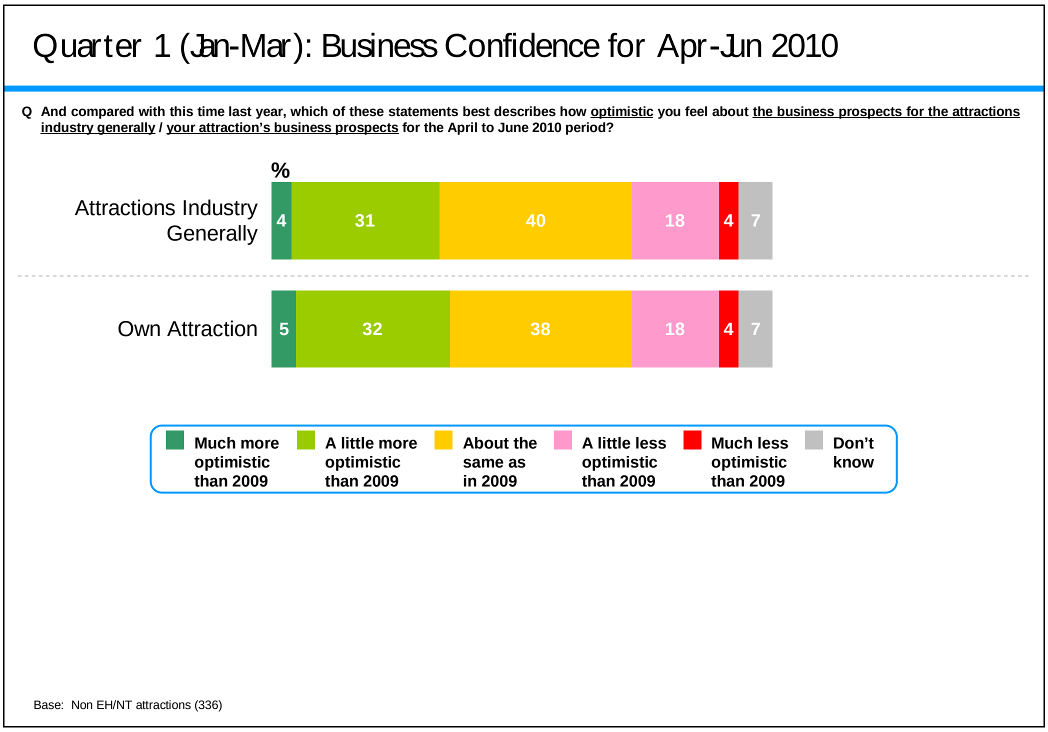
	% Higher than 2009
Museums/art galleries	35
Historic houses/castles	29
Under 50,000 visits p.a.	38
Over 50,000 visits p.a.	34

Base: Non EH/NT attractions (336)

Q1 in 2009 represented a positive sea change in business confidence, with over half (59%) of attractions expecting their visitor admissions for Q2 to be higher than last year compared with only 14% for the previous quarter. Q2 saw a slight softening in this confidence (52%), which continued into Q3 when 39% of attractions expected visits to increase during the forthcoming period. Q4 saw a significant decrease in expected visitor admissions (22%) for the following quarter, which has been borne out by the business performance of attractions.

Despite the performance of attractions in the January-March 2010 period, Q1 2010 has seen an increase in expected visitor admissions, with 36% of attractions expecting their admissions for Q2 2010 to be higher than last year. However, this level of confidence remains at a lower level than observed during the equivalent period of 2009 (59% expecting an increase in visits).

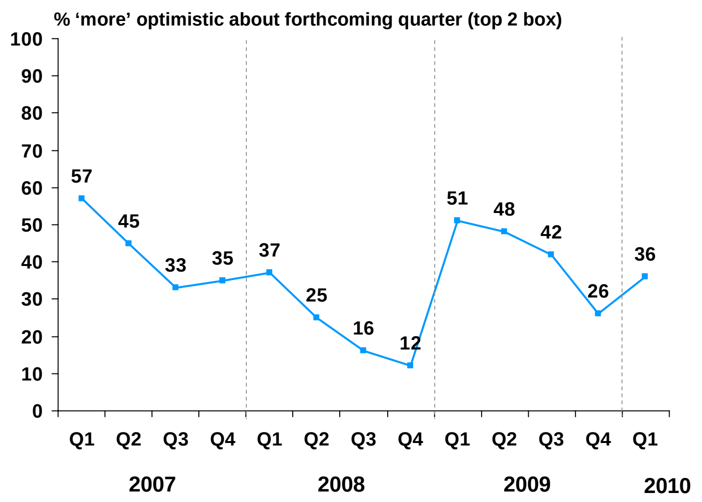
The following chart examines overall business confidence for the forthcoming quarter among attractions in Q1 2010, among the 336 non-English Heritage/National Trust attractions taking part in the survey.



In line with expected visitor admissions, there has been an uplift in confidence for the forthcoming quarter observed in Q1 2010. In Q1 36% of attractions felt more optimistic about their own attraction than at the same point in 2009. However, as the chart overleaf illustrates, business confidence does tend to take an upturn during the first quarter of each year.

The chart below shows business confidence over time, from Q1 2007 to the current quarter, Q1 2010.

Quarter 1 (Jan-Mar): Business Confidence Trends (own attraction)



Base: Q1: Non EH/NT attractions (336)

Despite the decline in confidence experienced throughout 2009, business confidence was still higher than levels seen during equivalent quarters of 2008. 2009 also followed a similar seasonal pattern to 2007 and 2008 with business confidence peaking at Q1 and declining as the rest of the year progressed. The uplift observed in Q1 2010 follows the seasonal pattern, but is not as high as seen in Q1 2009 – perhaps attractions feeling that they will do well to match their strong performance of 2009.

The following charts illustrate how current business confidence varies by region, attraction category, size of attraction, location of attraction (coastal, rural or urban) and whether the attraction is paid or free entry.

Quarter 1 (Jan-Mar): Business Confidence for Apr-Jun 2010 (Own Attraction) – by Region

Region	% more optimistic than 2009	% less optimistic than 2009
TOTAL ENGLAND (336)	**36**	**22**
North East (29)*	45	14
North West (51)	45	27
Yorkshire & The Humber (30)	43	20
East Midlands (35)	34	9
West Midlands (31)	32	23
East (24)*	32	24
London (23)*	48	13
South East (51)	33	22
South West (52)	23	37

* CAUTION: Low base sizes
Base: Non EH/NT attractions (336)

Optimism still generally outweighs pessimism, with the exception of the South West region (23% more optimistic and 37% less optimistic).

Business confidence was highest in the London (48% more optimistic and 13% less optimistic), North East (45% more optimistic, 14% less optimistic) and North West (45% more optimistic, 27% less optimistic) regions.

Quarter 1 (Jan-Mar): Business Confidence for Apr-Jun 2010 (Own Attraction) – by Attraction Category

Attraction Category	% more optimistic than 2009	% less optimistic than 2009
TOTAL ENGLAND (336)	**36**	**22**
Historic Houses/Castles (50)	33	19
Museums/art galleries (116)	36	19
Visitor/heritage centres (23)*	12	22
Wildlife attractions/zoos (19)*	34	39
Gardens (20)*	46	37
Others (95)	40	22

*CAUTION: Low base sizes
Base: Non EH/NT attractions (336)

Quarter 1 (Jan-Mar): Business Confidence for Apr-Jun 2010 (Own Attraction) – by Other Segments

		% more optimistic than 2009	% less optimistic than 2009
	TOTAL ENGLAND (336)	**36**	**22**
Visits per annum	Over 200,000 (39)	35	22
	100,001 – 200,000 (32)	43	37
	50,001 – 100,000 (45)	45	26
	20,001 – 50,000 (73)	29	26
	20,000 or less (147)	37	15
Free / paid	Paid (218)	36	26
	Free (118)	37	14
Location	Coastal (44)	35	32
	Rural (155)	34	21
	Urban (137)	39	20

Base: Non EH/NT attractions (336)

The smaller (50,000 or less visits per annum) attractions appear to be the least optimistic about Q2 2010, with attractions sized from 50,000 to 200,000 visitors the most optimistic about the forthcoming period.

Urban attractions continue to be slightly more optimistic (39%) than either rural (34%) or coastal (35%) attractions.

Attractions were asked to state reasons for their level of optimism for Q2 (Apr-Jun) 2010. The charts below illustrate positive and negative reasons for business confidence.

Quarter 1 (Jan-Mar): Reasons for Business Confidence Apr-Jun 2010 (Own Attraction) – Positives

Q Why do you feel this way about your attraction's business prospects for April to June 2010?

	Quarter 1 (%)
Improvements to events/exhibitions/attractions	12
New exhibitions/additional attractions	7
Economic climate / interest rates	7
Increase in domestic holiday/short break	7
Visitor number trends improving/hope it will continue	6
Refurbishments/improvements to site/investment	6
New/better/more advertising/marketing	6
More/new/better events	5
Positive / forward advance bookings	4
Reputation	3
Increasing interest in the area	2
Free/cheap admissions/ticket offers	2
Longer opening hours	2

Base: Non EH/NT attractions (336)

Optimism for the forthcoming April – June quarter in 2010 appears to be being driven primarily by recent investment or improvements made to the site, the economy and increasing domestic visitors:

- 12% mentioned improvements to the site
- 7% have new exhibitions/additional attractions
- 7% mention the economic climate
- 7% expect increasing domestic visitors/holidays
- 6% refurbishments/improvements to site/investments.

There are increasing mentions around improvements and additions to the site this quarter, backing evidence from the industry suggesting that 2010 might be another year of focus upon existing operations.

There also appears to be a degree of confidence that the 'staycation', or at least, day trips, will continue to prosper in 2010.

Quarter 1 (Jan-Mar): Reasons for Business Confidence Apr-Jun 2010 (Own Attraction) – Negatives

Q Why do you feel this way about your attraction's business prospects for April to June 2010?

	Quarter 1 (%)
Economic climate/interest rates/fuel prices	10
Poor weather/forecast	8
Visitor numbers/trends down this year	4
Less spending power of public	4
Decline in facility or investment/closed due to refurbishment	3
General election uncertainty	3
'Staycation' over, more holidaying abroad	3
Reduction in visitor/retail spend	2

Base: Non EH/NT attractions (336)

There remains a proportion who are feeling less optimistic than the equivalent quarter of last year and the reasons for this lack of optimism are dominated by the following:

- 10% mentioned the economic climate/recession, this becoming a top reason
- 8% mentioned poor weather, reflecting the prolonged colder weather from late 2009 into the first couple of months in 2010 – and perhaps also a reflection of the failure of the 2009 'barbecue summer' to materialise

This quarter there were new mentions around the uncertainty generated by a General Election – perhaps a call for clear messages from Government – and a limited fear of the end to the 'staycation'. Fears on the economic climate were perhaps related to the uncertainty of the General Election.

Some verbatim comments that exemplify the above follow.

Positive Mentions:

- *We have invested in marketing and on site improvements. We are expanding.*
- *Bookings to date are very much better than 2009.*
- *Hopefully the weather will be a lot better and we are open longer this year.*
- *More optimistic than this time last year regarding the local and national economic climate.*

- *Recent visitor numbers have increased dramatically during the past 6 months. Due in part to a new cafe being opened in the near by park and increased use of the parks in general.*
- *Increased exhibitions held in the centre to attract visitors.*
- *There are still a large number of people taking UK holidays although the extended winter has made for a slower than anticipated start this year.*
- *Building up a better presence within the local area and doing more educational work.*
- *We are continuing to hold monthly markets and forging on with more events outside normal opening hours and have had promising feedback and are now having to hold details on waiting lists, as tickets sell out quickly. We have also consulted a marketing agency to streamline our advertising and better use our budget.*
- *We have undergone a massive redecoration and have made plans for extending our visitor numbers.*
- *With a good start to the year under our belts we feel hopeful it will continue this way. Recent work with other local attractions to provide an enhanced offer is expected to bring in additional visitors.*
- *Winter had lots of problems (floods/snow etc) but visitor numbers were not down too significantly. Working on improving marketing and are a good value attraction - hopeful that if spending increases we'll see the first of it as a less expensive day out.*
- *We are in the process of refurbishment and once that is finished we will be doing a marketing push.*
- *We are now open on Sunday (from late September 09)and this brings in more visitors. Some exhibitions have attracted more interest.*
- *A number of exhibitions and other events are planned plus increased coach tour visits due to the 2012 Olympics.*
- *The Chapel is now better advertised with street signs.*
- *The prospect that we can't have two poor summers following and that the financial situation is improving, although fuel prices could have a large effect on rural church visits.*
- *We have formulated a new marketing plan which includes the production of a new visitor leaflet which has been distributed around Guesthouses and hotels in York. We are also inviting tourism colleagues to visit the venue which we also hope will generate interest.*
- *I'm hoping that now the weather is good and there's such uncertainty about flights abroad, people will begin to explore their local attractions.*
- *External grant funding for the next quarter should extend resources and capacity for our services for the next exhibition.*

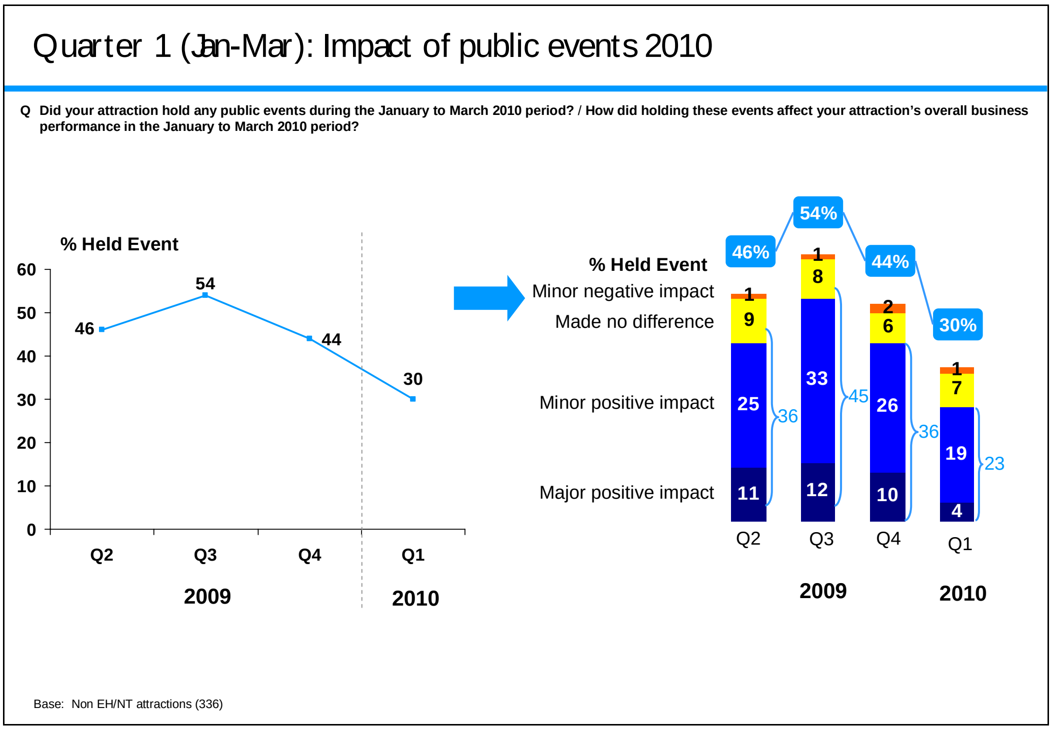
Negative Mentions:

- *'Cold 'winter' weather continuing into the Easter holidays. Economic uncertainty. High fuel prices.*
- *As a garden we have been affected by the very severe Winter and late Spring*
- *Weather, election, spending per head.*
- *The late spring is a decisive factor in influencing patterns of visits and spending. We are also noting more price resistance than at the same time last year.*
- *It has been a very poor start to the year. Poor visitor figures. Weather has not been bad. Fear of the unknown (election, recession, tax rises, petrol prices) seems to have a paralysing effect.*
- *The weather is continuing to be extremely challenging - the 'visiting' season seems to be making a very slow start this year, compared to recent seasons.*
- *Everyone being very careful with their money: uncertainty due to general election and possible policy changes thereafter.*
- *Though Easter holidays should be ok we expect the election and the world football cup to have a detrimental effect.*
- *Our figures for the first quarter were dreadful and the general feeling is that the last three years poor summer weather is taking its toll on the public. Plus the recession is now starting to bite peoples pockets.*
- *Despite murmurs that visitors will still be holidaying in this country next year, the signs so far suggest that the same money is not as "free-flowing" as last year. Last years figures were so far up on the year before that it would be hard to increase this substantially but if we could pull near we would be happy - hence the little less optimistic approach to this year.*
- *Recession plus expected economic shock post the election.*
- *Uncertainty in the market place due to election and current change of government make up, as well as severe government debt problems.*
- *People are not spending money this year. There are still too many people losing their jobs. The spiralling price of fuel is stopping people from travelling. Security problems are putting off the Americans from travelling. Strikes are putting off Europeans from travelling.*

7. PUBLIC EVENTS AND MEMBERSHIP Quarter 1 (Jan-Mar) 2010

For the first time in Q2 2009, attractions were asked to evaluate the impact of public events on their business performance. Public events were defined as any cultural, music or sporting events / festivals that take place on a single day or very limited period which are outside the usual operation of the attraction. Temporary exhibitions or seasonal operations such as Ice Rinks etc. were excluded from the definition.

The following chart illustrates the proportion of attractions that held public events over the course of a one year period, from Quarter 2 2009 to Quarter 1 2010, and the impact that these events had upon business performance.



During Q1 2010, under a third (30%) of all attractions held a public event, the lowest proportion observed of any quarter of the year. These events were generally seen as making a positive difference to business performance, with the vast majority of attractions that held an event reporting a positive impact. Overall in Q1, nearly a quarter (23%) of all attractions participating in the monitor had held public events which resulted in a positive impact upon their business performance – therefore the positive impact among those attractions holding events was still strong during this quarter.

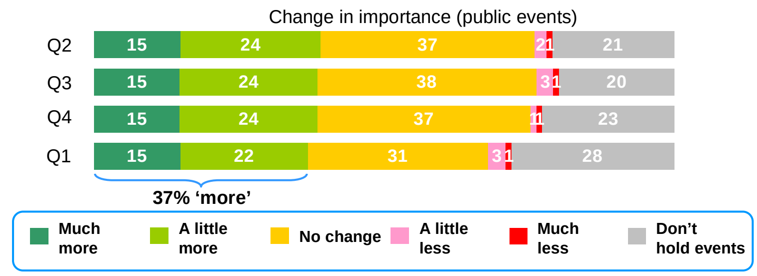
The impact of events tended to be more positive at urban attractions during this quarter, over a third (37%) holding a public event and 31% reporting a positive impact upon business performance.

Impact was greater among museums/art galleries, with 36% holding events and 31% reporting a positive impact upon business performance.

Attractions were also asked for their broader opinion of the extent to which such public events were becoming more or less important to them. The following chart illustrates the findings for Q1 2010.

Quarter 1 (Jan-Mar): Changing importance of events

Q. In general, would you say that these kinds of public events have become more or less important to your attraction in the past couple of years?



	% 'More' important
East Midlands	49
West Midlands	48
East of England	41
Yorks & Humber	40
North West	37
South East	33
North East	28
South West	23

	% 'More' important
Historic houses/castles	43
Museums/art galleries	40
Paid	32
Free	45

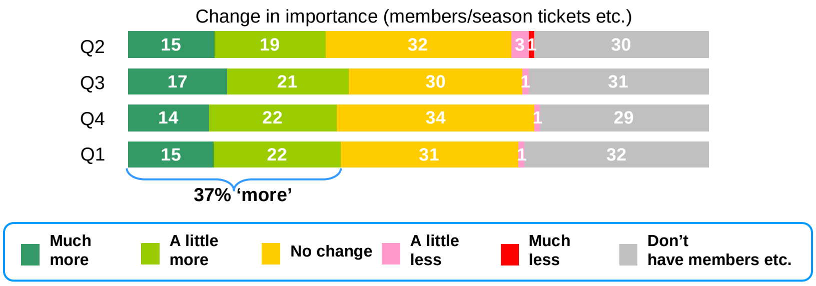
Base: Non EH/NT attractions (336)

The importance of these public events remains largely stable, with 37% of all attractions reporting that such events are more important to them now than a couple of years ago, 15% claiming that they are now much more important. Only 4% reported that they had become less important.

The following chart illustrates the changing importance of membership, season ticket and friends schemes to attractions.

Quarter 1 (Jan-Mar): Changing importance of members/season ticket holders/friends

Q. Thinking about the past couple of years, would you say that the members/season ticket holders/friends that your attraction has, have become more or less important to your attraction?



	% More important
Paid	43
Free	25
Historic houses/castles	48
Museums/art galleries	37

	% More important
Less than 20k visit p.a.	28
20k-50k visits p.a.	38
50k-100k visits p.a.	50
100k+ visits p.a.	46

Base: Non EH/NT attractions (336)

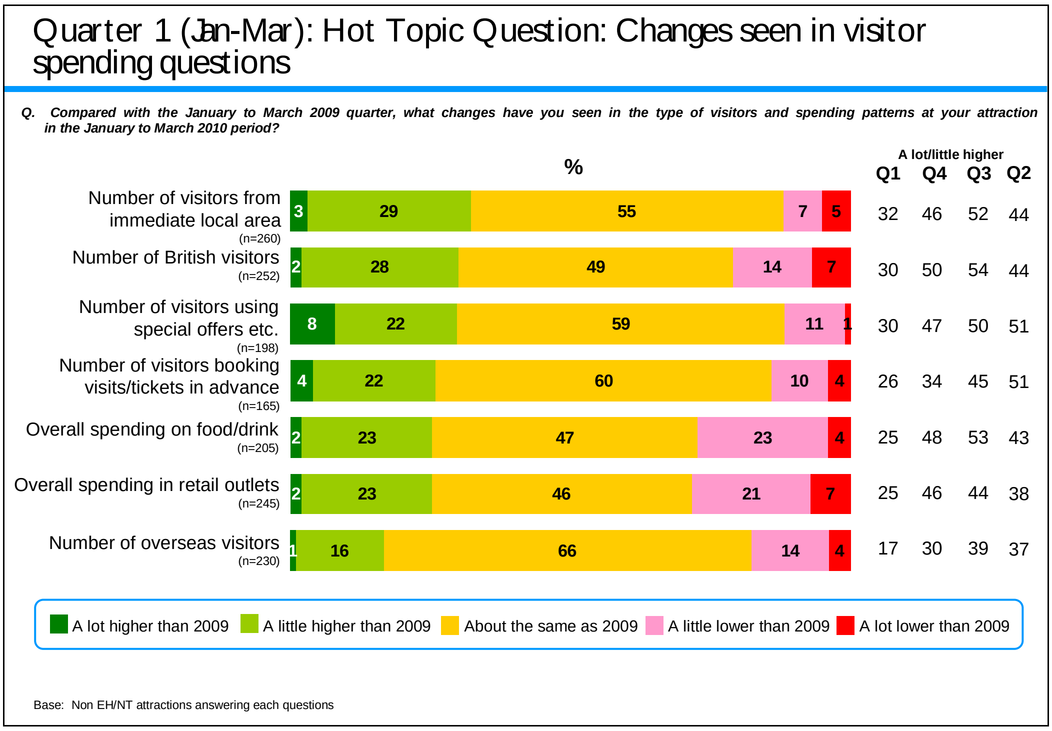
The importance of membership, season ticket and friends schemes also appears to be stable, with over a third (37%) of attractions at Q1 feeling that they have become more important to them.

Over two-thirds of participating attractions have a membership, season ticket or friends scheme. The importance of such schemes is perhaps enhanced during periods of economic downturn.

Paid attractions generally (43%), historic houses and castles (48%) and the larger attractions with 50,000+ visitors per annum were most likely to report that these schemes were becoming more important to them.

8. HOT TOPIC – IMPACT OF ECONOMY
Quarter 1 (Jan-Mar) 2010

The chart below illustrates the findings from this question for a fourth quarter (first introduced in Q2 2009). Attractions were asked what changes they had observed in the type of visitors and spending patterns at their attraction compared with the equivalent period in 2009 in order to examine the detailed impact of the economy on the industry. Results for each aspect are based upon those attractions for whom the aspect was both relevant and measurable.



Seasonality has undoubtedly impacted upon responses to this question, with proportions of attractions mentioning increases on each of these dimensions continuing to fall back further in Q1 2010 having started to fall back in the last quarter of 2009. The relatively poor performance of attractions in Q1 2010 has also perhaps made it more difficult for attractions to claim an increase in any of these visitor types – again pointing towards an ambition of stability for many attractions in 2010.

There are also significant shifts towards a ‘stable’ view point with at least half or more reporting ‘about the same as 2009’ with regard to visitor type and spending patterns. Slightly more attractions this quarter (21% cf 10% Q4 2009) report the number of British visitors and secondary spending on food and drink (27% cf 20% Q4 2009) to be lower than in 2009.