England Attractions Monitor

Quarter 4 Report

October - December 2009

Prepared for

VisitEngland

by

bdrc

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 4 2009 also retains the questions introduced in Quarter 2, to measure the impact of **public events and membership/friends schemes** on the business performance of attractions. Section 7 provides the detailed results.

2009 has also seen 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 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 final 2009 quarterly period (October – December) - **631 attractions** provided data (English Heritage/National Trust properties provide visit numbers only), consisting of:

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

The number of individual attractions taking part has increased significantly in 2 years 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 has been 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 Q4 (October to December 2009) period.

By way of context, the weather during Q4 was somewhat mixed, milder at the start and extremely cold towards the end. October recorded higher than average temperatures for the time of year, largely due to the very mild latter end of the month. Rainfall was also below average. November was unsettled throughout with showers or longer periods of rain and some strong winds. December was largely colder than preceding months, with snowfall and much colder temperatures after mid-month.

Following positive reports of notable increases in visitor admissions in each of Q2 and Q3 2009, Q4 remains positive with an overall quarterly uplift in visitor admissions of +4%. However, this increase was driven solely by a successful October (visits increased by +10%), with visits in both November (-5%) and December (-1%) declining year-on-year.

This has been translated into an accelerated softening of business confidence for Q1 2010 – driven by fears over the continued poor weather over the winter and reflecting set backs in other business success measures from the wider economy. However, despite this softening, business confidence remains higher than levels seen during equivalent quarters of 2008.

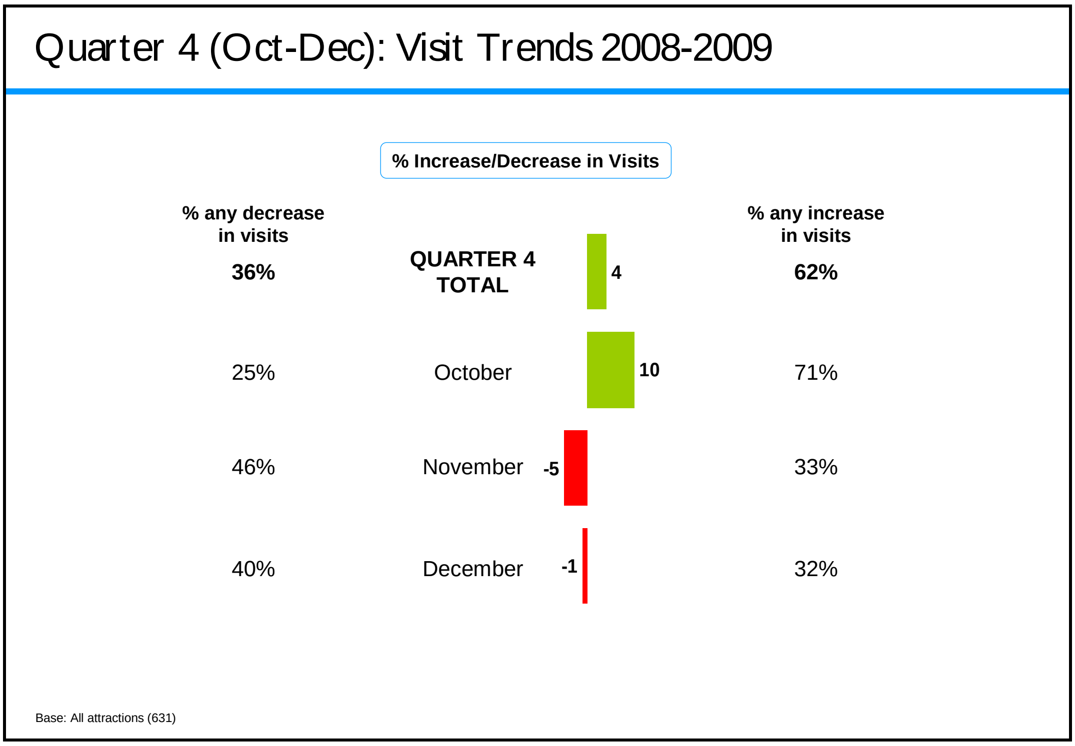
A seasonal pattern of business confidence has also emerged over the past three years, with business confidence starting high in Q1 and gradually decreasing as each year progresses.

Those attractions which have or are investing in their attraction tend to be the ones with greatest confidence for the next quarter – either refurbishing the site or introducing new exhibitions or events.

Recovery in secondary spending has continued, with particularly encouraging improvements for retail spend. 46% of attractions reported higher retail spending in Q4 2009 compared with Q4 2008.

4. VISIT TRENDS - Quarter 4 (Oct-Dec) 2008/9

The chart below illustrates the percentage change in visitor admissions between Q4 2008 and Q4 2009 among the 631 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, Q2 2009 reported a notable +15% increase in visits over the quarter. Q3 continued to be positive, with an uplift in visitor admissions (+5%). Q4 has also been positive, with an overall uplift in visitor admissions of +4%.

However, this increase has not been consistent over the quarter. October drives the uplift, with a +10% rise compared to the same month in 2008, the highest monthly increase since Q2 of 2009. However, November and December both reported year-on-year decreases in visits, with attractions more likely to report decreases than increases in visits.

Certainly, the relatively fine weather in October and colder weather in November and December partially explains this pattern. However, results also mirror the domestic economy generally, which has shown a fall back on several business measures in late 2009, following an initial period of recovery mid-year.

The following charts illustrate how visitor admissions trends for Q4 vary by region, attraction category, size of attraction, location of attraction (coastal, rural or urban) and paid/free entry.

Quarter 4 (Oct-Dec): Visit Trends 2008-2009– By Region

Region	Total Qtr 4 Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
TOTAL ENGLAND (631)	**4**	**10**	**-5**	**-1**
North East (35)	4	18	-20	-4
North West (67)	-4	-1	-8	-7
Yorkshire & The Humber (46)	2	17	-23	-7
East Midlands (67)	14	17	8	14
West Midlands (55)	13	22	-5	7
East (78)	6	7	6	2
London (42)	6	8	6	2
South East (121)	*	8	-9	-8
South West (120)	4	12	-14	-4

Base: All attractions (631)

Overall, the North West was the only region to report a decrease in visitor admissions in Q4 2009, with falls across each month. As in previous quarters, the tough comparators driven by the Capital of Culture event of 2008 lies at the root of this decline. The Midlands reported the most significant visitor admissions increases. Across the quarter, only London, East and East Midlands reported increases each month.

Quarter 4 (Oct-Dec): Visit Trends 2008-2009– By Attraction Category

Attraction Category	Total Qtr 4 Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
TOTAL ENGLAND (631)	**4**	**10**	**-5**	**-1**
Historic Houses/Castles (230)	11	19	-12	2
Other historic properties (51)	7	20	-11	2
Museums/art galleries (144)	*	2	-1	-1
Gardens (49)	6	16	-17	-11
Visitor/heritage centres (21)*	12	14	10	10
Wildlife attractions/zoos (31)	-2	5	-12	-10
Others (104)	1	7	-5	-2

*CAUTION: Low base sizes
Base: All attractions (631)

Year-on-year increases in visitor admissions continued to be the highest within the heritage sector - visitor/heritage centres (+12%), historic houses/castles (+11%) and other historic properties (+7%). Visitor/heritage centres weathered the storm with no year-on-year decreases in visitor admissions across any of the three months of Q4.

Gardens also appear to have benefited from the fine weather during October (+16%), but suffered in the latter, colder months of the quarter, November (-17%) and December (-11%). Similarly wildlife attractions/zoos also appeared to have suffered as a result of the weather in November (-12%) and December (-10%).

Quarter 4 (Oct-Dec): Visit Trends 2008-2009– By Other Segments

		Total Qtr 4 Change (%)	Oct Change (%)	Nov Change (%)	Dec Change (%)
	TOTAL ENGLAND (631)	**4**	**10**	**-5**	**-1**
Visits per annum	Over 200,000 (45)	1	6	-3	-2
	100,001 – 200,000 (78)	7	13	-7	2
	50,001 – 100,000 (110)	5	14	-11	-1
	20,001 – 50,000 (155)	8	19	-9	-5
	20,000 or less (241)	6	10	*	3
Free/paid	Paid (489)	6	14	-7	-1
	Free (142)	*	2	-3	-2
Location	Coastal (71)	2	14	-25	-5
	Rural (341)	6	13	-7	-3
	Urban (219)	2	6	-1	*

Base: All attractions (631)

The very largest attractions with over 200,000 visitors performed below the national average of +4% over the quarter as a whole, achieving only a 1% increase in visitors.

Paid attractions continued to fare better than free attractions during the quarter, with paid attractions reporting a +6% increase in admissions.

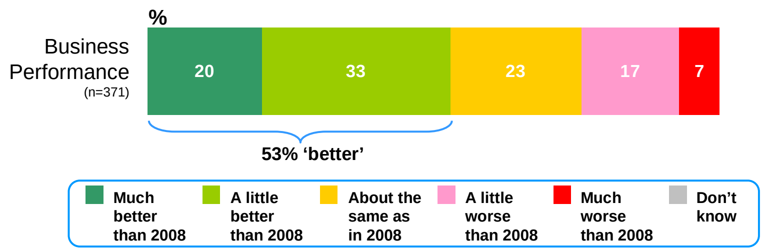
Continuing the trend observed at Q2 and Q3, rural attractions (+6%) reported the largest increases in admissions. Coastal attractions also reported significant increases in October (+14%) but were hardest hit during the more unsettled November (-25%).

5. BUSINESS PERFORMANCE TRENDS Quarter 4 (Oct-Dec) 2008/9

In addition to being asked about visitor admissions, attractions were also asked to state how they felt that their business had performed overall during Q4 2009 compared with Q4 2008. The chart below illustrates the proportions of the 371 attractions (excluding English Heritage/National Trust properties) taking part in the survey in Q4 2009 who felt that their business had performed better or worse.

Quarter 4 (Oct-Dec): Overall Business Performance Trends 2008-2009

Q We would now like you to think about how the overall business performance of your attraction has changed in the October to December 2009 period compared with October to December 2008. Would you say that your overall business performance in the October to December 2009 period was….?



	% Better than 2008
East Midlands	70
West Midlands	43
North West	57
South East	52
East of England	46
South West	49

	% Better than 2008
Historic houses/castles	68
Museums/art galleries	49
Paid	53
Free	53

Base: Non EH/NT attractions (371)

53% of attractions taking part in the survey felt that their business performance was either much better (20%) or a little better (33%) than in Q4 2008. However, this represents a decrease from earlier in 2009 – Q3 2009 (63%), Q2 2009 (59%). Despite the decrease in Q4, business performance continues to be rated significantly higher than at the start of 2009 and 2008 – 37% in Q1 2009, 36% in Q4 2008 and 33% in each of Q3 and Q2 2008.

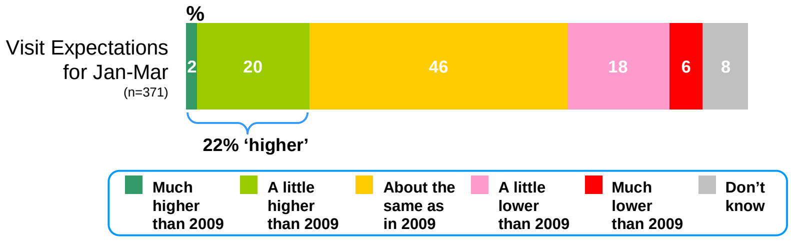
Conversely, the proportion of attractions feeling that their business performance was worsening compared with the equivalent quarter the previous year has increased after declining in Q2 and Q3 of 2009 – 23% compared with 18% in Q3 2009 and 20% in Q2 2009. 2008 saw these figures significantly higher – 29% in Q4 2008, 37% in Q3 2008 and 35% in Q2 2008.

6. BUSINESS CONFIDENCE TRENDS
Quarter 4 (Oct-Dec) 2008/9

The chart below examines attractions' expectations for visitor admissions in Q1 2010 compared with actual visitor admissions recorded in Q1 2009.

Quarter 4 (Oct-Dec): Visit Expectations for Jan-Mar 2010

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



	% Higher than 2008
East Midlands	28
West Midlands	23
North West	21
South East	20
East of England	15
South West	13

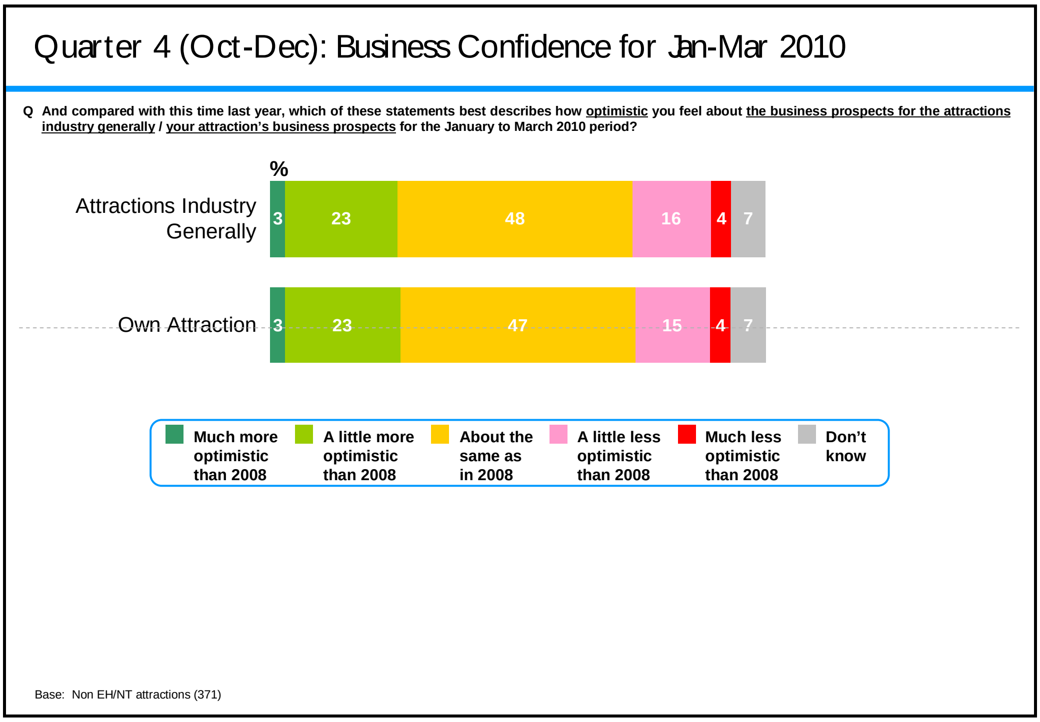
	% Higher than 2008
Historic houses/castles	21
Museums/art galleries	26
Paid	21
Free	24

Base: Non EH/NT attractions (371)

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.

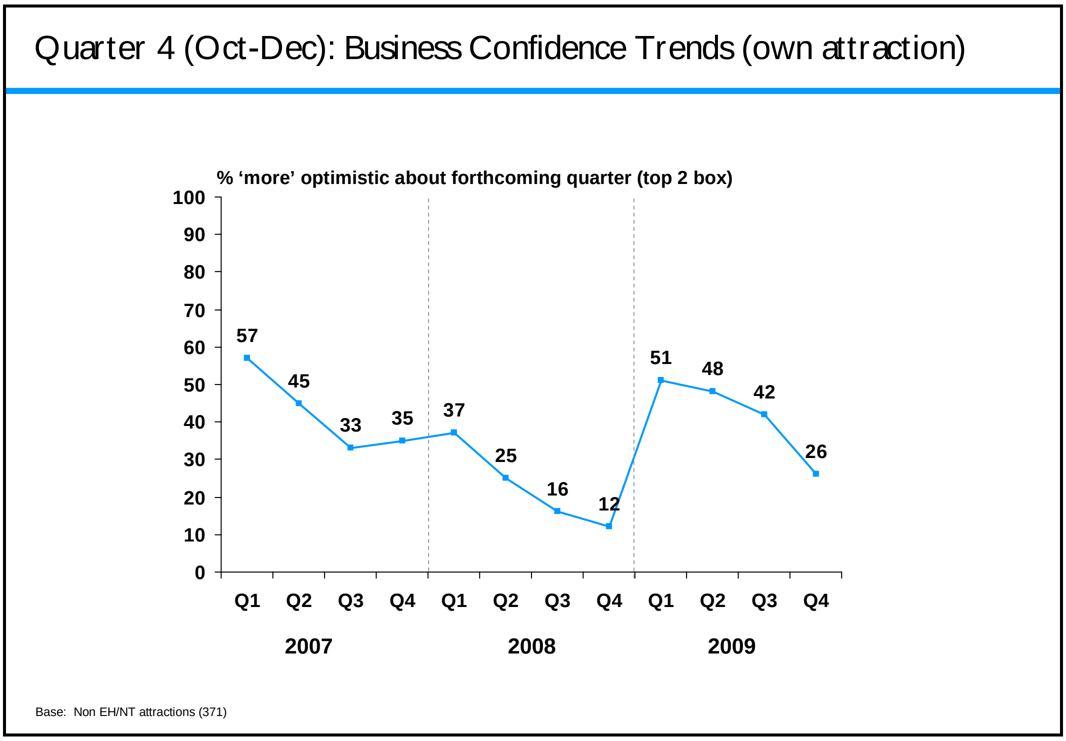
Q4 has seen a significant decrease in business confidence in terms of expected visitor admissions – perhaps in line with the falls in visitor admissions experienced in November and December 2009. Only 22% of attractions expect their admissions for Q1 2010 to be higher than last year (when performance was also down on 2008).

The following chart examines overall business confidence for the forthcoming quarter among attractions in Q4 2009, among the 371 non-English Heritage/National Trust attractions taking part in the survey.



Consistent with expected visitor admissions, there has been a notable decrease in confidence for the forthcoming quarter observed in Q4 2009 In Q4, just 26% of attractions felt more optimistic about their own attraction than at the same point in 2008.

The chart below shows business confidence over time, from Q1 2007 to the current quarter, Q4 2009.



Despite this decline in confidence experienced throughout 2009, particularly Q4, business confidence is 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.

Although attractions have become less optimistic the shift has predominantly been towards a 'stable' view point with almost half (47%) expecting 'about the same as 2008'. Only 19% of attractions are less optimistic now than they were during the equivalent quarter of 2008, only a slight increase from Q3 2009 (13%).

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 4 (Oct-Dec): Business Confidence for Jan-Mar 2010 (Own Attraction) – by Region

Region	% more optimistic than 2008	% less optimistic than 2008
TOTAL ENGLAND (371)	**27**	**19**
North East (15)*	33	20
North West (47)	30	23
Yorkshire & The Humber (28)*	14	25
East Midlands (47)	34	9
West Midlands (30)	30	10
East (52)	23	19
London (26)*	42	15
South East (71)	30	23
South West (55)	16	24

CAUTION: Low base sizes
Base: Non EH/NT attractions (371)

Business confidence was highest in the London (42% more optimistic and 15% less optimistic) and East Midlands (34% more optimistic, 9% less optimistic) regions.

Optimism still generally outweighs pessimism, with the only regions in which pessimism outweighs the optimism being the South West and Yorkshire & The Humber.

Quarter 4 (Oct-Dec): Business Confidence for Jan-Mar 2010 (Own Attraction) – by Attraction Category

Attraction Category	% more optimistic than 2008	% less optimistic than 2008
TOTAL ENGLAND (371)	**27**	**19**
Historic Houses/Castles (51)	27	16
Museums/art galleries (140)	26	18
Visitor/heritage centres (20)*	33	4
Wildlife attractions/zoos (29)*	17	34
Gardens (23)*	37	13
Others (95)	25	22

CAUTION: Low base sizes
Base: Non EH/NT attractions (371)

Optimism was highest among visitor/heritage centres and gardens. Wildlife attractions were the least optimistic, with pessimism outweighing optimism (17% more optimistic, 34% less optimistic).

Quarter 4 (Oct-Dec): Business Confidence for Jan-Mar 2010 (Own Attraction) – by Other Segments

		% more optimistic than 2008	% less optimistic than 2008
	TOTAL ENGLAND (371)	**27**	**19**
Visits per annum	Over 200,000 (37)	40	16
	100,001 – 200,000 (35)	30	28
	50,001 – 100,000 (53)	26	17
	20,001 – 50,000 (88)	19	26
	20,000 or less (156)	27	15
Free / paid	Paid (238)	23	23
	Free (133)	33	12
Location	Coastal (42)	20	34
	Rural (173)	22	21
	Urban (156)	34	12

Base: Non EH/NT attractions (371)

The smaller (50,000 or less visits per annum) attractions appear to be the least optimistic about Q1 2010. Despite reporting the smallest increases in visitor admissions for Q4 2009, optimism was highest amongst the largest (200,000+ visits) attractions.

In contrast to previous quarters, optimism was higher among free attractions (33% more optimistic) than paid attractions (23% more optimistic). Urban attractions were slightly more optimistic (34%) than either rural (22%) or coastal (20%) attractions.

Attractions were asked to state reasons for their level of optimism for Q1 (Jan to Mar) 2010. The charts below illustrate positive and negative reasons for business confidence.

Quarter 4 (Oct-Dec): Reasons for Business Confidence Jan-Mar 2010 (Own Attraction) - Positives

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

	Quarter 4 (%)
Visitor number trends improving/hope it will continue	4
Refurbishments/improvements to site/investment	4
New exhibitions/additional attractions	3
More/better publicity/PR/media coverage	3
Positive / forward advance bookings	3
Economic climate / interest rates	3
More/new/better events	2
New/better/more advertising/marketing	2
Better known / increasing interest in the area	2
Increase in number of school groups / education	2

Base: Non EH/NT attractions (371)

Optimism for the forthcoming January – March quarter in 2010 appears to be being driven primarily by the positive experiences observed at their own attraction over the past few months, investment in the site and external communications:

- 4% felt that visitor numbers had improved and hoped that it would continue;
- 4% mentioned refurbishments or general improvements to the site;
- 3% have new exhibitions/additional attractions;
- 3% expect more or improved media / PR coverage.

However, mentions of increasing domestic visitors/holidays and the positive benefits of the economy on domestic tourism have decreased significantly in this quarter – perhaps as one might expect during the winter off-peak period.

Quarter 4 (Oct-Dec): Reasons for Business Confidence Jan-Mar 2010 (Own Attraction) - Negatives

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

	Quarter 4 (%)
Poor weather/forecast	10
Economic climate/recession	7
Refurbishment/building work/closed due to building work	5
Lack of/declining external investments/funds	2

Base: Non EH/NT attractions (371)

Although remaining at slightly lower levels than positive mentions, 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 poor weather, perhaps reflecting the colder weather late in 2009 and very early in 2010;
- 7% mentioned the economic climate/recession, with mentions becoming more prominent once again this quarter;
- 5% mentioned refurbishment work / building work which tends to be a more commonly mentioned reason for pessimism during the Q4 and Q1 periods.

Some verbatim comments that exemplify the above follow.

Positive Mentions:

- *Because we have got more bookings than last year*
- *I feel that we have promoted our venue more and that more people will take part in tourist type activities and that we have come through the worst of the economic climate*
- *We have made improvements and have plans to draw in more visitors*
- *We have more pre bookings for hosting events than before*
- *We do not charge a fee to get in. Many families will want to go to places that are free.*
- *Our attraction is based around animals and growing vegetables which is high in the public consciousness at the moment*

- *New retail lines and new events programme should have a positive effect on performance.*
- *More optimism in economy generally.*
- *We are working hard to improve our visitor experience in general and are also putting a much greater emphasis on education, reaching out to all the schools across Suffolk.*
- *We have placed more advertising and publicity over the past year than the year before. We are getting more word of mouth referrals, particularly from schools and groups. Our reputation is spreading as we move into our fourth year of operation. We are allocating more staff time and making more effort to get free editorial and to maximise other promotional opportunities.*
- *The gardens are not open during this period but we are putting on more events, both gardening and for children.*
- *We are planning a number of events that we hope will help improve our figures*
- *Involved in exciting (funded) project as part of the London World City programme. Have more booking so far for this period than last year.*
- *We are settling in to the credit crunch and have an appreciation of its effect with the upside that people are holidaying in the UK*
- *We have an outstanding exhibition running throughout January and February which has gained lots of press exposure so we expect to see high visitor numbers coming through the front door. We are also being contacted regularly by people wanting to hire our venue space for meetings etc.*
- *Visitor numbers should remain high and the exchange rate means that we are taking more in secondary spend*
- *We have invested in improvements to one of our main galleries which has helped to improve visitor figures - in addition because we do not charge for admission in the current economic climate visitors particularly on low income are attracted by this*
- *Refurbishment of visitor facilities carried out over winter, new events (walks and activities) offered during the period, new advertising and property leaflets designed to attract more visitors.*
- *Figures are generally up on last year and the credit crunch is now old news!*
- *2009 has been much better than we expected at the beginning of the year and as the pound remains very low, the UK is much more competitive than in previous years.*

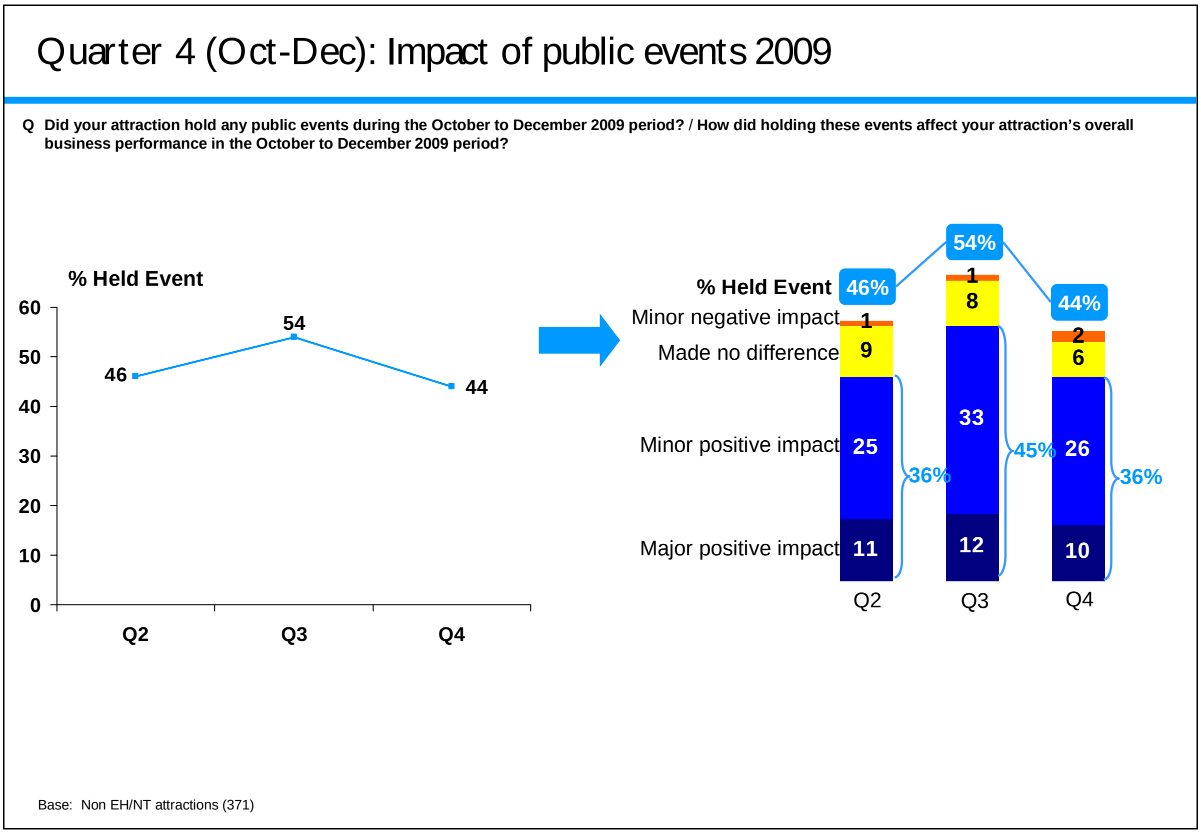
Negative Mentions:

- *Museum is closed! Weather is awful , economy not good*
- *House closed but many fewer enquiries than this time last year regarding weddings, visits or theatre enquiries.*
- *Many less pre-booked groups this year. Less enquiries*
- *Recession and weather*
- *Attraction was at centre of summer's ecoli outbreak. Farm has been closed much of past quarter and now partially open.*
- *Local issues affect us greatly at the moment. The aftermath of flooding and downed bridges in West Cumbria (traffic congestion, long detours) since November 09 has continued to put off visitors to our area. This is unlikely to change significantly until road communications are back to normal. This could take 18 months-2 years.*
- *We believe that recession isn't over and that the effects of it haven't properly hit attractions. The weather is also influencing our view.*
- *People seem to want 'deals'*
- *As funding for museums decreases it becomes harder to attract visitors and provide a quality level of service.*
- *We have been closed now for three weeks due to the weather. Recovery time is likely to take a little while before visitors return in good numbers. Also fuel costs are quite high at the moment.*
- *The snow and cold weather has affected us badly. The museum is currently not accessible to the public and won't be until a thaw sets in.*
- *The impact of the recession seems to be starting to hit home now, this was masked in summer 2009 by increased staycation.*
- *Got fewer bookings for the early past of the year compared to this time last year.*
- *The weather at the start of the year has prevented people from visiting. Easter isn't until April in 2010, when business really picks up.*
- *Last year the recession was talked about, had not really hit, this year I believe people will be very cautious with their leisure pound*
- *Visitor figures seem to be down across most local museums at the moment, probably due to the financial climate.*
- *We had to close the castle due to the snow and it is possible the same will happen in the next 2 months. Also people have less money to spend.*
- *I feel the recession will hit tourism more at the start of this year - there are numerous offers for cheap flights etc.*

7. PUBLIC EVENTS AND MEMBERSHIP
Quarter 3 (Jul-Sept) 2009

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 from Quarter 2 to Quarter 4 and the impact that these events had upon business performance.



During Q4 2009, under half (44%) of all attractions held a public event, a decrease of -10% on the last quarter, but similar to the proportion observed at Q2. 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 Q4, over a third (36%) of all attractions participating in the monitor had held public events which resulted in a positive impact upon their business performance.

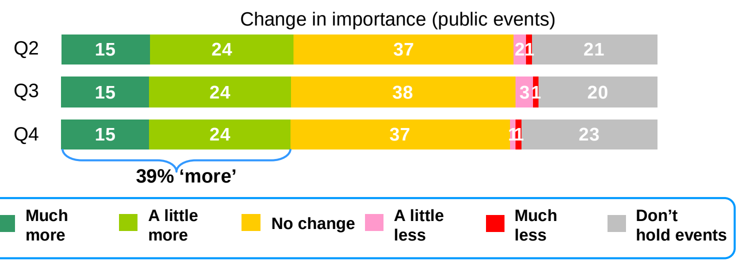
The impact of events tended to be more positive at historic houses/castles, over half (53%) holding a public event and 41% reporting a positive impact upon business performance.

Impact was also greater among larger attractions, with 53% of attractions with over 50,000 visits per annum holding events and 44% 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 Q4 2009.

Quarter 4 (Oct-Dec): 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?



Q4	% 'More' important
North West	47
South East	44
South West	40
West Midlands	37
East Midlands	34
East of England	33

Q4	% 'More' important
Historic houses/castles	39
Museums/art galleries	39

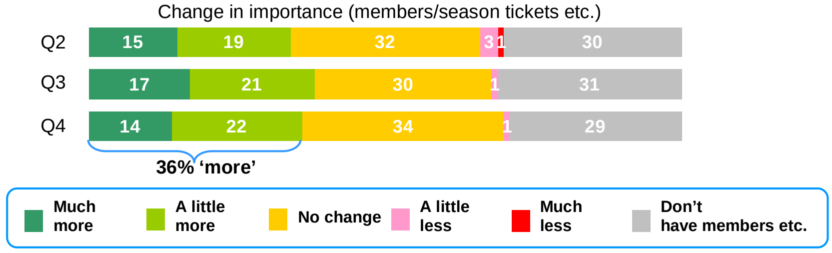
Base: Non EH/NT attractions (371)

The importance of these public events appears to be growing, with 39% 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 2% reported that they had become less important. This position has remained stable during 2009.

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

Quarter 4 (Oct-Dec): 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?



Q4	% More important
Paid	44
Free	21
Historic houses/castles	41
Museums/art galleries	30

Q4	% More important
Less than 20k visit p.a.	25
20k-50k visits p.a.	40
50k-100k visits p.a.	44
100k+ visits p.a.	47

Base: Non EH/NT attractions (371)

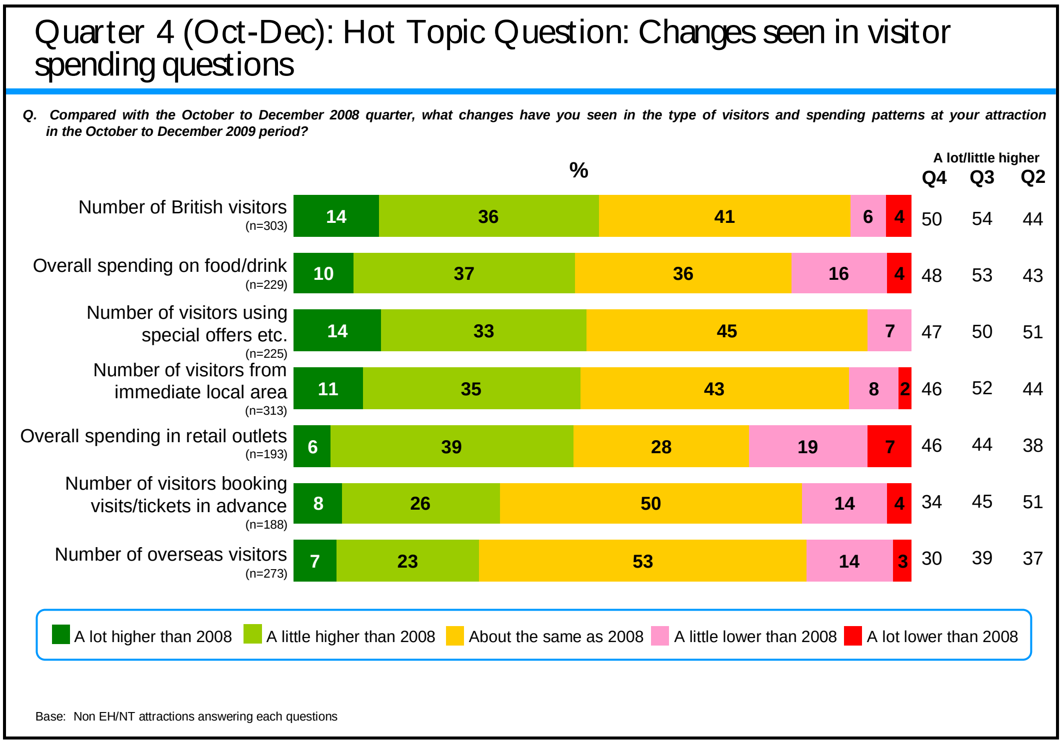
The importance of membership, season ticket and friends schemes also appears to be growing, with over a third (36%) of attractions at Q4 feeling that they have become more important to them.

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 (44%), historic houses and castles (41%) and larger attractions with 100,000+ visitors per annum (47%) were most likely to report that these schemes were becoming more important to them.

8. HOT TOPIC – IMPACT OF ECONOMY Quarter 4 (Oct-Dec) 2009

The chart below illustrates the findings from this question for a third quarter (first introduced in Q2). 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 2008 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 (bar one) falling back in Q4 2009.

Only recovery in **retail spending** appears to be continuing, with 46% of attractions reported an increase in retail spending in Q4 compared with 44% in Q3. Although proportions mentioning an increase in secondary spending in terms of **food and drink** have fallen, this decline is slight (from 53% in Q3 to 48% in Q4) and remains higher than at Q2 2009 (43%). The underlying trend for secondary spend appears to be a positive one.