

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
- Survey was enhanced in 2007 to incorporate not only recent visit trends but also questions relating to business confidence for the forthcoming quarter:
 - Visit expectations for own attraction
 - Opinion of business prospects for attractions industry generally
 - Opinion of business prospects for own attraction
 - Reasons for own attraction's business prospects
- The following charts examine the results for the third quarter of 2007 (July-September) in the North West region

Methodology

- Objective for 2007 to create national panel of **c.500 attractions** comprising:
 - c.200 individual attractions recruited by telephone (c.20-25 per England region);
 - c.300 English Heritage/National Trust properties (with visit data provided centrally).
- The North West region have boosted sample sizes within their region to enable analysis of results in greater detail (there is also the facility to add bespoke questions). In Quarter 3:
 - A total of 86 attractions in the North West (20 EH/NT, 66 other)
- Attractions primarily recruited by telephone, with data collection subsequently taking place online (some recruitment was conducted solely by email). Cross-section of attractions recruited according to type, size and free/paid admission
- National panel is increasing in size over time:
 - Quarter 3 (Jul to Sep 2007) - 607 attractions
 - Quarter 2 (Apr to Jun 2007) - 574 attractions
 - Quarter 1 (Jan to Mar 2007) - 551 attractions
- Inevitably across the year some attractions will join the panel, whilst others drop out. Comparisons will always be made among constant samples where appropriate

North West - Quarter 3 Visit Trends 2006-2007 (Jul-Sept)

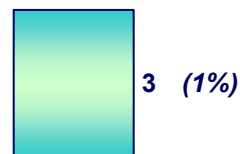
% any decrease
in visits

% Increase/Decrease in Visits

% any increase
in visits

38% (49%)

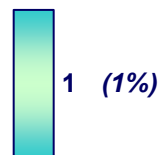
QUARTER 3
TOTAL



58% (47%)

37% (49%)

July



56% (45%)

38% (45%)

August



58% (50%)

49% (45%)

(*%) -*

September



47% (49%)

N.B. Figures in brackets represent results for England overall

North West - Quarter 3 Visit Trends 2006-2007 By Attraction Category

Attraction Category	Total Qtr 3 Change (%)	
	North West	England
TOTAL (86)	3	1
Historic Houses/Castles (23)	3	3
Museums/art galleries (28)	3	-1
Other properties (35)	3	1

N.B. Figures in brackets represent sample sizes in North West region

North West - Quarter 3 Visit Trends 2006-2007 By Other Segments

	Total Qtr 3 Change (%)	
	North West	England
TOTAL (86)	3	1
<u>Visits Per Annum</u>		
Over 200,000 (9)	1	-1
100,001 – 200,000 (7)	2	1
50,001 – 100,000 (15)	2	1
20,001 – 50,000 (21)	6	3
20,000 or less (34)	17	7
<u>Free/Paid</u>		
Paid (56)	1	1
Free (30)	6	0
<u>Location</u>		
Coastal (8)	-2	-1
Rural (36)	6	3
Urban (42)	2	*

N.B. Figures in brackets represent sample sizes in North West region

North West - Quarter 3 Visit Trends 2005-2007 (%)

%



Higher than Q3 last year About the same as Q3 last year Lower than Q3 last year Don't know

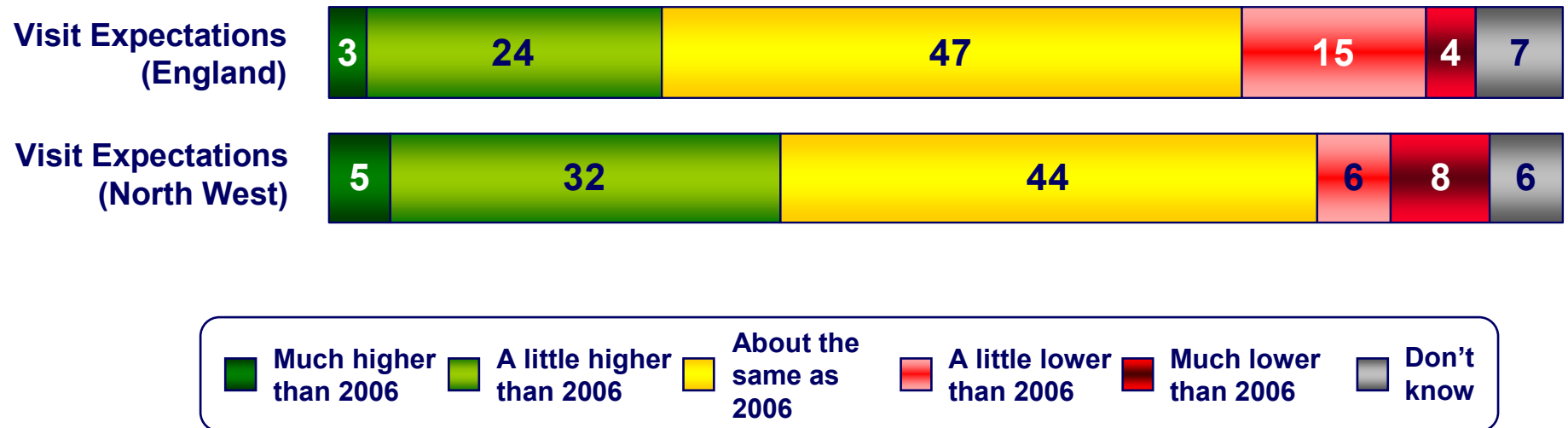
North West - Quarter 3 Business Confidence for Oct-Dec 2007

%



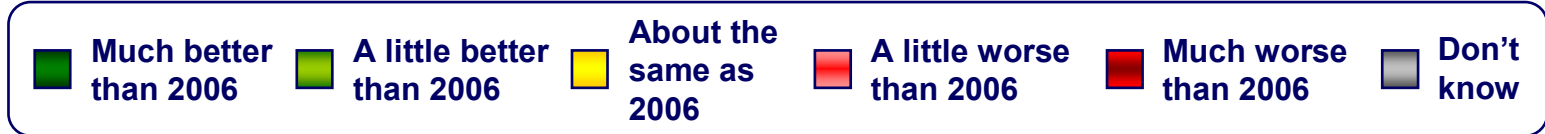
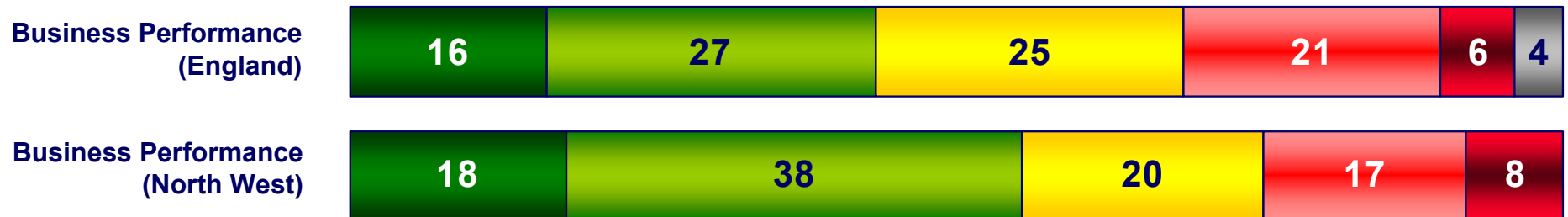
Base: Non EH/NT attractions (66 in North West)

North West - Quarter 3 Visits Expectations for Oct-Dec 2007



Base: Non EH/NT attractions (66 in North West)

North West - Qtr 3 Overall Business Performance Trends 2006-2007 (%)



Base: Non EH/NT attractions (66 in North West)

North West - Qtr 3 Reasons for Business Confidence Oct-Dec 07 (Own Attraction) - Positives

	North West % (n=66)	England % (n=311)
ANY POSITIVE	42	43
Events/exhibitions improvement	20	13
Visitor number trends improving	17	13
Facility improvement/refurbishment/investment	11	7
Other site improvement	5	8
Better known/interested/area improving	5	4
Publicity/PR	3	5
Advertising/marketing	2	4
Weather	-	2
Tourism/economic market changes	-	1

North West - Qtr 3 Reasons for Business Confidence Oct-Dec 07 (Own Attraction) - Negatives

	North West % (n=66)	England % (n=311)
ANY NEGATIVE	47	45
Facility decline/refurbishment/investment	15	20
Tourism/economic market changes	15	9
Weather	12	8
Visitor trends declining	8	8
Other site decline	6	3
Visitor decline/competition/area declining	5	8
Events/exhibitions decline	5	3
Advertising/marketing/PR	2	3