# Visitor Attractions Trends in England 2020

# Annual Report for Heritage Counts

Prepared for Historic England





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### 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 2020 and trend data.

#### 1.1 Visitor Attraction Definition

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

"..an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc."

#### 1.2 Research Objectives

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

#### 1.3 Survey Method

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

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

#### 1.4 Sample

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

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

1,301 English visitor attractions provided visits figures for the year 2020. 653 historic sites responded, compared with 674 for the year 2019 and 725 for the year 2018.

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

Given that the value of this report lies predominantly in the assessment of trends over time, perhaps the more important sample size measure is the number of attractions providing admissions information for both 2020 and 2019. In 2020 there were 490 such historic sites. Previous years comparators: 2019 (586), 2018 (623).

#### Table A.1 Response by Attraction Category

Category	Number of attractions that provided data (2020)	Number of attractions that provided data (2019)	Number of attractions that provided data (2018)
Castles/forts	81	81	82
Gardens	76	91	89
Historic houses	251	255	272
Historic monuments	55	52	53
Visitor/heritage centres	71	70	81
Places of worship	36	34	54
Other historic sites	83	91	94
Total	653	674	725



#### 1.5 Survey Definitions

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

Abbreviation	Category	Description
С	Castles/forts	Castles, forts, citadels, defence towers
G	Gardens	Gardens, arboretums and botanical gardens
нн	Historic houses	Historic houses, historic houses and gardens, palaces, royal residences
НМ	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
		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 Counties: Derbyshire, Leicestershire, Lincolnshire,
EM	East Midlands	Northamptonshire, Nottinghamshire
		<b>UAs:</b> Derby, Leicester, Nottingham, Rutland
LON	London	All Greater London boroughs
		Counties: County Durham, Northumberland
NE	North East	<b>UAs:</b> Darlington, Hartlepool, Middlesborough, Redcar & Cleveland, Stockton-on-Tees
		<b>Former Met.:</b> Tyne and Wear ( <i>Gateshead, Newcastle, N Tyneside, S Tyneside, Sunderland</i> )
		Counties: Cheshire, Cumbria, Lancashire
		UAs: Blackburn with Darwen, Blackpool, Halton, Warrington
NW	North West	Former Met.: Greater Manchester (Bolton, Bury, Manchester,
		Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan),
		Merseyside (Liverpool, Knowsley, Sefton, St Helens, Wirral)
		<b>Counties:</b> Buckinghamshire, East Sussex, Hampshire, Kent, Oxfordshire, Surrey, West Sussex
SE	South East	<b>UAs:</b> Bracknell Forest, Brighton & Hove, Isle of Wight, Medway,
01		Milton Keynes, Portsmouth, Reading, Slough, Southampton W.
		Berkshire, Windsor & Maidenhead, Wokingham
		Counties: Cornwall, Devon, Dorset, Gloucestershire, Somerset,
SW	South West	Wiltshire, Isles of Scilly
577	South West	UAs: Bath & NE Somerset, Bournemouth, Bristol, N Somerset,
		Plymouth, Poole, Swindon, Torbay, S Gloucestershire
		Counties: Shropshire, Staffordshire, Warwickshire, Worcestershire
WM	West Midlands	UAs: Herefordshire, Stoke-on-Trent, Telford & Wrekin
		Former Met.: West Midlands (Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall, Wolverhampton)
		Counties: North Yorkshire
		<b>UAs:</b> East Riding of Yorkshire, Kingston-upon-Hull, NE Lincolnshire,
V011		N Lincolnshire, York
Y&H	Yorkshire/ The Humber	Former Met.: South Yorkshire (Barnsley, Doncaster, Rotherham, Sheffield)
		West Yorkshire (Bradford, Calderdale, Kirklees, Leeds, Wakefield)

### 2. Main Tables

#### 2.1 Geographical Distribution of Historic Sites

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

This table shows that there is a slightly higher distribution of historic sites in the south of the country than in any other regions.

	тот	AL	N.	E.	N.\	Ν.	Y8	Н	E.I	И.	W.I	М.	Ea	st	Lo	n	S.I	Ξ.	S.V	V.
	No.		No.	%																
Castles/forts	81	12	16	36	4	7	9	16	7	11	4	6	4	6	1	3	16	13	20	16
Gardens	76	12	3	7	6	10	5	9	5	8	4	6	10	15	2	5	21	16	20	16
Historic houses	251	38	8	18	28	46	17	30	29	48	38	53	20	31	18	48	46	36	47	37
Historic monuments	55	8	7	16	2	3	8	14	2	3	7	10	8	12	4	10	6	5	11	9
Visitor/heritage centres	71	11	3	7	12	20	5	9	12	20	7	10	8	12	3	8	14	11	7	6
Places of worship	36	6	4	9	1	2	6	11	2	3	4	6	4	6	4	10	7	5	4	3
Other historic sites	83	13	3	7	8	13	6	11	4	7	8	11	11	17	7	18	18	14	18	14
TOTAL	653		44		61		56		61		72		65		39		128		127	
Total % of attractions	100		7		9		9		9		11		10		6		20		19	

Table A.2	Geographic	Distribution	of Historic Sit	es – by GOR
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#### 2.2 Visitor Numbers to Historic Sites

Table A.3 illustrates the numbers and profile of visits (paid and free) to historic sites by category type among responding attractions. The trend data (% change 19/20) reports the change in visits among attractions that have provided visits figures for both 2019 and 2020.

This table shows that the highest drop in visits between 2019 and 2020 was for historic monuments, while gardens saw the lowest drop out of the different types of historic attraction.

#### Table A.3 Visits to Historic Sites

	Sample	% Of visits	Average no. of visits	Total visits	% change 19/20
SAMPLE		(30.2m)	(30.2m at 653 sites)	(30.2m at 653	
				sites)	
Castles/forts	81	12%	32,000	2,451,000	-68
Gardens	76	12%	111,000	6,879,000	-42
Historic houses	251	38%	64,000	13,340,000	-55
Historic monuments	55	8%	38,000	1,516,000	-76
Visitor/heritage centres	71	11%	30,000	1,537,000	-69
Places of worship	36	6%	86,000	2,858,000	-67
Other historic sites	83	13%	34,000	1,639,000	-68
TOTAL HISTORIC	653	100%	58,000	30,220,000	-59
TOTAL ATTRACTIONS	1,301	N/A	62,000	64,687,000	-65

Table A.4 examines numbers of visits to historic site types within each Government Office Region. London had the greatest drop in visits across both historic sites and all attractions overall, while Yorkshire saw the lowest drop in visits.

Data in 000s	Total	N.E.	N.W.	Y&H	E.M.	W.M.	East	Lon	S.E.	S.W.
Castles/forts	2,451	209	81	184	127	141	52	448	716	492
Gardens	6,879	199	7	319	20	73	546	1,251	2,892	1,572
Historic houses	13,340	427	1,487	547	1,271	1,942	1,411	1,206	3,253	1,796
Historic monuments	1,516	43	5	132	100	18	75	204	102	836
Visitor/heritage centres	1,537	37	114	332	92	202	258	117	66	318
Places of worship	2,858	152	26	286	21	48	1,052	632	373	268
Other historic sites	1,639	3	190	259	11	6	13	717	246	192
TOTAL HISTORIC	30,220	1,070	1,910	2,059	1,642	2,432	3,407	4,575	7,649	5,475
Total % of visits	100	4	6	7	5	8	11	15	25	18
% change 19/20	-59	-64	-52	-49	-53	-58	-56	-73	-51	-60
TOTAL ATTRACTIONS	64,687	1,973	7,515	5,458	3,533	5,096	6,567	16,412	10,269	7,862
Total % of visits	100	3	12	8	5	8	10	25	16	12
% change 19/20	-65	-70	-63	-50	-57	-51	-55	-77	-65	-63

#### Table A.4 Visits to Historic Sites – by GOR

#### 2.3 Origin of Visitors to Historic Sites

Attractions were asked to estimate the proportion of its visits accounted for by overseas visitors and by local/day trip visitors. Table A.5 illustrates the results within each historic site category. *This table shows how on average all historic attractions had an over 90% drop in number of overseas visitors in 2020 when compared to 2019.* 

#### Table A.5 Origin of Visitors to Historic Sites

	% Overseas	%	% Local/day	% Other UK
		19/20	trip	
Castles/forts	4	-90	81	15
Gardens	2	-92	84	14
Historic houses	2	-96	82	16
Historic monuments	12	-95	39	50
Visitor/heritage centres	10	-81	72	18
Places of worship	21	-93	71	8
Other historic sites	12	-88	85	4
TOTAL HISTORIC	7	-92	76	17
TOTAL ATTRACTIONS	10	-93	71	19

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

This table shows how overseas visits drop by more than twice the drop in local / day trip visits.

	Overseas	Local/day trip
	% change	% 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

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

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

London saw the smallest drop in overseas visits to historic sites in 2020 vs 2019, although this was still a significant -88% drop. Meanwhile, both the South West and West Midlands saw the joint biggest drop in visitor figures vs 2019:-97%. Local / day trip visitors meanwhile saw the biggest drop in the North East -80%, with the smallest being in the South East at -36%.

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

OVERSEAS VISITORS	Overall % change	N.E. % change	N.W. % change	Y&H % change	E.M. % change	W.M % change	EAST % change	LON % change	S.E. % change	S.W. % chang e
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

LOCAL/DAY TRIP VISITORS	Overall % change	N.E. % change	N.W. % change	Y&H % change	E.M. % change	W.M % change	EAST % change	LON % change	S.E. % change	S.W. % chang e
2008-09	+17	+29	+21	+20	+25	+9	+7	+21	+18	+17
2009-10	+4	-7	+3	+13	+7	+*	+*	+1	+2	+5
2010-11	+5	-*	-16	-4	+13	+17	+13	+4	+6	+2
2011-12	-6	-7	-7	-6	-2	-3	-3	-22	-4	-8
2012-13	+11	+14	-9	+8	+13	+4	+8	+12	+14	+32
2013-14	+7	+5	+9	+12	-12	+3	+7	+20	+4	+6
2014-15	+7	+2	+1	+5	+20	+9	+6	+3	+2	+15
2015-16	+7	+14	-2	+9	-4	+2	+9	+10	+7	+11
2016-17	+7	+17	+7	+6	-5	+9	+14	+11	+2	+10
2017-18	-1	0	-1	-4	-10	+16	+3	-11	+1	+2
2018-19	+7	+13	-2	+11	-8	+3	0	+7	+16	+8
2019-20	-45	-80	-39	-53	-51	-53	-38	-45	-36	-69

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

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

Across all regions, visits to historic sites in 2020 came primarily from local / day trip visits.

	% Overseas	% Local/day	% Other UK
		trip	
North East	4	61	34
North West	2	92	7
Yorkshire and The Humber	3	79	18
East Midlands	2	74	24
West Midlands	3	83	13
East	2	89	9
London	38	55	7
South East	3	85	12
South West	3	63	33
TOTAL HISTORIC	7	76	17

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

#### 2.4 Family Visits to Historic Sites

Attractions were asked to estimate the proportion of its visits accounted for by family groups (i.e. parties with children aged under 18), and whether this was higher, lower or similar to 2019. Table A.10 illustrates the results within each historic site category.

Table A.10 shows that family visits make up just over a third of visits to castles / forts, Visitor/Heritage centres and to historic monuments while for other types of attraction this proportion is slightly lower.

	Sample	% Increase	% Similar	% Decrease	Proportion of
					total visits
Castles/forts	(66)	44	48	8	36%
Gardens	(38)	24	32	45	25%
Historic houses	(85)	31	31	39	27%
Historic monuments	(32)	53	31	16	34%
Visitor/heritage centres	(51)	10	27	63	31%
Places of worship	(27)	11	22	67	17%
Other historic sites	(39)	10	23	67	21%
TOTAL HISTORIC	(338)	28	32	40	27%
TOTAL ATTRACTIONS	(853)	12	81	7	34%

#### Table A.10 Family Group Visits to Historic Sites

#### 2.5 Free/Paid Admission to Historic Sites

Attractions were asked whether they charged admission to the main attraction in 2020. Table A.11 illustrates the proportions of attractions and visits that were paid or free within each historic site type. *For historic sites, just under 3 out of every 4 attractions are paid, with these attracting 86% of visits. This is a higher proportion than we see for the total attractions average.* 

#### Table A.11 Free/Paid Admission to Historic Sites

	Free Adm	nission	Paid Adm	ission
	% Of attractions	% Of visits	% Of attractions	% Of visits
Castles/forts	5	2	95	98
Gardens	14	0	86	100
Historic houses	9	6	91	94
Historic monuments	29	15	71	85
Visitor/heritage centres	70	59	30	41
Places of worship	86	72	14	28
Other historic sites	44	11	56	89
TOTAL HISTORIC	26	14	74	86

TOTAL ATTRACTIONS39376163Table A.12 illustrates the proportions of attractions and visits that were paid or free admissionwithin each region.

Across the different regions, the higher proportion of attractions are paid, and paid sites that also attract the higher proportion of visits.

	Free Adm	ission	Paid Adm	nission
	% Of attractions	% Of visits	% Of attractions	% Of visits
North East	33	18	67	82
North West	40	6	60	94
Yorkshire and The Humber	25	24	75	76
East Midlands	34	7	66	93
West Midlands	28	10	72	90
East	30	31	70	61
London	15	23	85	77
South East	24	4	76	96
South West	16	13	84	87
TOTAL HISTORIC	26	14	74	86
TOTAL ATTRACTIONS	39	37	61	63

#### Table A.12 Free/Paid Admission to Historic Sites

#### 2.6 Admission Prices to Historic Sites

Table A.13 examines the average admission prices charged by attractions in each historic site category type in 2020. 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.

This shows that on average historic attractions charge slightly lower for both adults and children than the total attraction average.

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

	Sample	Average adult	Average child	Adult/child charge
	(adult paid attractions)	admission charge	admission charge	ratio %
Castles/forts	(74)	£8.94	£5.18	58
Gardens	(61)	£7.85	£4.24	54
Historic houses	(203)	£9.21	£4.87	53
Historic monuments	(38)	£8.26	£5.08	62
Visitor/heritage centres	(21)	£8.69	£5.52	64
Places of worship	(5*)	*	*	*
Other historic sites	(41)	£7.47	£3.99	53
TOTAL HISTORIC	(443)	£8.77	£4.84	55
TOTAL ATTRACTIONS	(712)	£8.84	£5.41	61

#### \*base too low to report

Table A.14 examines the average admission prices charged by attractions in each region in 2020.

Across the different regions, we can see that historic attractions in London charge the highest price while those in the West Midlands on average charge the lowest.

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

	Sample	Average adult	Average child	Adult/child
	(adult paid	admission	admission	charge ratio
	attractions)	charge	charge	%
North East	(28)	£8.21	£4.83	59
North West	(34)	£8.03	£4.62	58
Yorkshire and The Humber	(37)	£8.77	£5.10	58
East Midlands	(38)	£8.72	£4.78	55
West Midlands	(47)	£7.86	£4.06	52
East	(43)	£8.37	£4.92	59
London	(30)	£12.37	£6.35	51
South East	(90)	£9.10	£5.16	57
South West	(96)	£8.40	£4.51	54
TOTAL HISTORIC	(443)	£8.77	£4.84	55
TOTAL ATTRACTIONS	(712)	£8.84	£5.41	61

Table A.15 shows the trends in adult admission fees since 2008-09. Adult admission fees for historic sites dropped in 2019-20, possibly due to reductions in price from attractions that were only partially open.

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

	Adult admission fees %
	change
2008-09	+4
2009-10	+5
2010-11	+6
2011-12	+5
2012-13	+4
2013-14	+4
2014-15	+5
2015-16	+8
2016-17	+5
2017-18	+6
2018-19	+6
2019-20	-10.73

#### 2.7 Revenue of Historic Sites

Attractions were asked to indicate whether their gross revenue had increased, decreased or remained similar to the levels seen in 2019. Table A.16 illustrates the results by historic site category type.

*This table shows how revenue has dropped in 2020 compared to 2019 by 58% for all types of historic attraction.* 

	Sample	% Increase	% Similar	% Decrease	%19/20
					change
Castles/forts	(69)	-	3	97	-61
Gardens	(42)	10	7	83	-44
Historic houses	(98)	2	4	94	-57
Historic monuments	(45)	-	9	91	-44
Visitor/heritage centres	(55)	-	9	91	-65
Places of worship	(29)	-	14	86	-60
Other historic sites	(41)	2	5	93	-67
TOTAL HISTORIC	(379)	2	6	92	-58
TOTAL ATTRACTIONS	(866)	3	9	88	-55

#### Table A.16 Gross Revenue Trend at Historic Sites 2019-2020

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

Across the different regions, the greatest drop in revenue for historic sites was in the North West while the smallest drop was in Yorkshire and the Humber.

#### Table A.17 Gross Revenue Trend at Historic Sites 2019-2020 – by GOR

	Sample	% Increase	% Similar	% Decrease	% 19/20
					change
North East	(26)	-	12	88	-54
North West	(36)	3	6	92	-69
Yorkshire and The Humber	(42)	2	-	98	-31
East Midlands	(40)	5	5	90	-58
West Midlands	(37)	-	8	92	-50
East	(41)	-	7	93	-59
London	(26)	4	8	88	-62
South East	(68)	1	4	94	-67
South West	(63)	2	10	89	-58
TOTAL HISTORIC	(379)	2	6	92	-58
TOTAL ATTRACTIONS	(866)	3	9	88	-55

Table A.18 below examines the overall revenue from donations for historic sites across the different attraction types

Across those that stated that their revenue from donations was similar to 2019, historic houses had the highest level.

Table A.18 Overall revenue from donations in 2020 compared to 2019 by attraction type(%)

	Sample	% Increase	% Similar	% Decrease
Castles/forts	(65)	6	7	52
Gardens	(29)	4	10	15
Historic houses	(85)	15	30	40
Historic monuments	(44)	6	10	28
Visitor/heritage centres	(42)	1	15	26
Places of worship	(24)	1	2	21
Other historic sites	(37)	3	7	27
TOTAL HISTORIC	(379)	11	25	64
TOTAL ATTRACTIONS	(726)	13	22	65

#### 2.8 School and Educational Visits to Historic Sites

Sites were asked to record the number of schoolchildren visiting their site in 2020. Table A.19 below illustrates results for the 309 attractions with visiting school children who responded to the question:

- The average number of school children visiting each category type e.g. those castles
   / forts open to school children visits attracted an average of 934 school visits in 2020.
   Across all historic attractions open to school visits, an average of 651 school visits
   were made;
- 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 might be generated by the median number of visits i.e. If all attractions were ordered in terms of their school visit numbers, how many school visits does the attraction that falls exactly at the midpoint in this ordering attract?
- Total school children visits within each attraction category reflects the total number of school visits to attractions responding to this question;
- The percentage change in school visits examines those attractions responding to this question in both 2019 and 2020 and looks at the overall change in school visits for these attractions e.g. the number of school visits to castles responding in both 2019 and 2020 decreased by -91%.

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	Sample	Average no. of school children visits	Total school children visits	% Change 19/20
Castles/forts	(66)	633	42,000	-91
Gardens	(31)	960	30,000	-72
Historic houses	(90)	342	31,000	-90
Historic monuments	(35)	477	17,000	-90
Visitor/heritage centres	(34)	704	24,000	-81
Places of worship	(24)	2,154	52,000	-65
Other historic sites	(29)	224	6,000	-91
TOTAL HISTORIC	(309)	651	201,000	-85
TOTAL ATTRACTIONS	(740)	934	691,000	-84

#### Table A.19 School Visits to Historic Sites – by Site Type

Table A.20 illustrates both the average and total numbers of schoolchildren visiting each region among the 309 attractions with visiting schoolchildren answering the question.

This shows that the North East had the greatest drop in school children visits to historic sites in 2020 compared to 2019.

	Sample	Average no. of	Total school	% Change
		school children	children visits	19/20
		visits		
North East	(24)	108	3,000	-91
North West	(32)	325	10,000	-83
Yorkshire and The Humber	(36)	214	8,000	-89
East Midlands	(29)	318	9,000	-84
West Midlands	(35)	480	17,000	-85
East	(26)	406	11,000	-88
London	(25)	2,590	65,000	-85
South East	(54)	1,115	60,000	-80
South West	(48)	395	19,000	-88
TOTAL HISTORIC	(309)	651	201,000	-85
TOTAL ATTRACTIONS	(740)	934	691,000	-84

#### Table A.20 School Visits to Historic Sites – by Region

#### 2.9 Expenditure on Marketing by Historic Sites

Table A.21 examines the movement in marketing spend at historic sites between 2019 and 2020. Attractions were asked to indicate whether spend had increased, decreased or remained similar compared with 2019.

Here we see that across all types of historic site, spend on marketing decreased by at least -68%, with places of worship seeing the smallest decrease an castles/forts seeing the largest drop of -94%.

	Sample	% Increase	% Similar	% Decrease
Castles/forts	(69)	1	4	94
Gardens	(40)	-	28	73
Historic houses	(101)	1	15	84
Historic monuments	(46)	-	9	91
Visitor/heritage centres	(54)	2	22	76
Places of worship	(31)	-	32	68
Other historic sites	(42)	2	10	88
TOTAL HISTORIC	(383)	1	15	84
TOTAL ATTRACTIONS	(872)	2	19	79

#### Table A.21 Movement in Spend on Marketing at Historic Sites 2019-2020

Table A.22 shows the trends in marketing expenditure since 2008-09. This highlights that the drop of -84% seen in marketing expenditure in 2020 for historic sites is significantly higher than any drop since 2008-09.

#### Table A.22 Trends in Marketing Spend by Historic Sites

	% Up	% Down
2008-09	19	7
2009-10	16	9
2010-11	16	10
2011-12	16	15
2012-13	15	10
2013-14	13	8
2014-15	17	7
2015-16	17	10
2016-17	14	10
2017-18	11	9
2018-19	13	7
2019-20	1	84

#### 2.10 Provision of Digital Communications by Historic Sites

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

Historic attractions provided a good level of digital communication in 2020, with own websites, Facebook and twitter being the most popular channels used on average.

Category	Castles/ forts <sup>1</sup>	Gardens	Historic houses	Historic monuments <sup>1</sup>	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic	Total Attractions
Sample	(70)	(44)	(106)	(47)	(61)	(33)	(42)	(403)	(519)
ANY (*excl. website/ online booking)	97	91	90	96	82	88	81	90	91
Website*	97	95	95	96	89	97	86	94	96
Facebook page	97	86	87	94	80	82	79	87	89
Twitter account	90	73	77	85	41	55	45	69	63
E-newsletters	87	41	60	87	31	39	29	57	48
Instagram/Pinterest	94	73	73	77	31	45	40	65	56
Online booking*	87	50	59	66	34	27	29	54	49
YouTube	80	30	43	79	20	39	24	46	38
Online blogs	83	16	48	81	15	12	19	43	31
Mobile apps	77	-	28	70	10	6	12	32	15
Mobile website	4	7	11	6	2	3	5	6	8
Other social media	77	11	33	74	15	18	14	37	21

#### Table A.23 Provision of Digital Communications in 2020 by Attraction Category (%)

<sup>1</sup> EH accounts for most

castles/forts/monuments

#### 2.11 Response to the Covid-19 pandemic

Attractions taking part in the 2020 survey were also asked about their response to the Covid-19 pandemic.

#### Table A.24 Measures put in place as a result of Covid-19 by attraction category (%)

This table shows which measures attractions put in place as a result of Covid-19 pandemic to enable sites to continue to engage with audiences in 2020. This table shows the detail by attraction category.

Provision of hand sanitizers and enhanced cleaning were the most popular measures to be taken up by historic sites, and daily guest and staff health checks were the least popular.

	Castles/ forts <sup>1</sup>	Gardens	Historic houses	Historic monuments <sup>1</sup>	Visitor/ heritage	Places of	Other historic sites	Total Historic	Total Attractions
Category					centres	worship			
Sample	(67)	(34)	(90)	(35)	(44)	(25)	(37)	(332)	(747)
Hand sanitizers	94	64	76	82	56	73	52	72	81
Enhanced cleaning regimes	94	58	74	82	53	67	50	70	79
Enforced social distancing	93	56	68	82	55	70	50	68	77
Contactless check-in and payments	91	47	59	79	45	42	37	59	66
Obtained the 'We're Good To Go' industry standard	87	47	56	68	39	39	28	55	62
Closure of communal areas	87	42	61	76	23	42	24	53	53
Certification for complying with official hygiene and distancing guidelines	86	24	45	60	32	33	26	46	45
Daily staff health checks	6	20	15	6	10	21	9	12	19
Daily guest health checks	0	4	7	2	3	6	9	5	8
None of these	3	9	6	6	16	3	26	9	14

1 EH accounts for most castles/forts/monuments

 Table A.25
 Marketing activity to address impact of Covid-19 by attraction category (%)

 Dusing activity that marketing activity they did to address the impact of COVID 40 and

Businesses were asked what marketing activity they did to address the impact of COVID-19 and engage with audiences in 2020. This table shows the detail by attraction category.

Free content and developing retail offer were the more popular activities to be taken up, while offering home schooling at a cost was the least popular approach amongst historic sites.

	Castles/	Gardens	Historic houses	Historic	Visitor/ heritage	Places of worship	Other histori	Total Historic	Total Attractions
Category	forts <sup>1</sup>		nouses	monuments <sup>1</sup>	centres	worsnip	c sites		
Sample	(68)	(36)	(91)	(43)	(44)	(36)	(22)	(340)	(766)
Offered online tours/ video content - for free	79	30	47	83	15	30	30	47	41
Developed your online retail offer	77	27	36	79	15	18	22	41	31
Offered home- schooling/ family content – for free	79	23	36	81	15	18	17	40	34
Offered online learning (schools/adults) – for free	1	23	9	11	16	9	7	10	16
Offered online tours/ video content – at a cost	1	7	9	2	3	0	0	4	5
Offered online learning (schools/adults) – at a cost	0	5	6	4	5	3	0	4	5
Offered home- schooling/ family content – at a cost	0	2	0	0	0	3	2	1	1
None of these	13	43	29	9	49	24	43	29	30

1 EH accounts for most castles/forts/monuments

**Table A.26 Require visitors to pre-book visits to attraction in 2020 by attraction type (%)** In 2020 sites were often required to open with reduced capacity and to allow for this the attractions often had to require visitors to pre book their visits. This table shows the detail by attraction category.

Places of worship and visitor / heritage centres had the highest proportion of historic attractions that did not require any pre booking for their visitors while castles / forts had highest number of attractions allowing entry solely if tickets were pre booked.

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic
Sample	(67)	(34)	(84)	(35)	(45)	(23)	(35)	(323)
No	9	47	27	20	69	70	60	37
Yes – but some walk ups were permitted where capacity allowed	12	32	29	11	27	22	23	22
Yes – visitors were only allowed in if they pre-booked their tickets	79	21	44	69	4	9	17	41

#### Table A.27 Attraction online booking system by attraction type (%)

Table A.27 looks at the number of historic sites that have booking systems and how many were introduced in 2020 or earlier. This table shows the detail by attraction category. *This table shows that 43% of historic sites introduced an online booking system in 2020.* 

Category	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage centres	Places of worship	Other historic sites	Total Historic
Sample	(67)	(33)	(90)	(36)	(47)	(26)	(38)	(337)
No	7	36	24	17	66	77	63	36
Yes – introduced in 2019 or before	7	24	37	17	30	12	11	22
Yes – introduced in 2020	85	39	39	67	4	12	26	43

## 3. Appendix

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

Table A.28 shows the indexed trend based on the visits (see Table A.30) given by responding historic sites. Because the number of responding historic sites differs each year (see Table A.29), 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 1991), therefore by -7% (among the sample of castles / forts responding in both 1991), therefore bringing the index down from 103 to 96.

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

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

#### Table A.28 Index – By Historic Site Category

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

Table A.29 shows the number of responding historic sites in each survey year. Each site is asked to provide visits figures for both the survey year and the previous year in order to enable visits trends to be calculated based on the same sites. Numbers below show the number of historic sites who responded in 2020.

Table A.29	Number of Respondin	a Historic Sites Providing	Visits Figures 1989-2020
Table A.23	Number of Respondin	g matoric ones i roviume	Visits i igules 1303-2020

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

Table A.30 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.30 Number of Visits to Responding England Historic Sites 1989-2020 (Millions)

Survey Year	Data Year	Castles/ forts	Gardens	Historic houses	Historic monuments	Visitor/ heritage	Places of worship	Other historic	Total England
						centres		sites	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

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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

### Table A.31Index – By Region

### Trends in No. of Visits to England Historic Sites 2000-2020 Indices 2000=100 Constant Samples (From One Year to Next Only)

Data	North	North	Yorks &	East	West	East	London	South	South	Total
Year	East	West	Humber	Mids	Mids			East	West	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

## Table A.32Index – By RegionTrends in No. of School Visits to England Historic Sites 2001-2020 Indices 2001=100Constant 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
rear	Lust	West	Tumber	mas	mas			Lust	West	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

## Table A.33Index – By Historic Site CategoryTrends in No. of School Visits to England Historic Sites 2001-2020 Indices 2001=100Constant Samples (From One Year to Next Only)

Data	Castles/	Gardens	Historic	Historic	Visitor/	Places of	Other	Total
Year	forts		houses	monuments	heritage centres	worship	historic sites	England historic
					Centres		3163	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