

Action for Attractions

Visitor attractions are one of the great glories of English tourism, spanning a huge range, from high culture to pure fun. There are blockbuster attractions, but the majority are small businesses – over half receive fewer than 20,000 visitors a year.

Attractions are facing severe challenges, increasingly from activities outside the field of traditional tourism. The relaxation of Sunday trading has meant that competition for attractions is no longer a game of golf; it is a football match, or a visit to a retail park. Closer to home, serious competition is coming too, from new attractions, mainly developed with Lottery and European funding. To meet visitors rising expectations the attraction provider must constantly re-invest, and strive to improve standards of customer service.

The ETC has developed this strategy with the help of a group of leading attractions professionals working together for the good of the sector. It aims to improve understanding of the dynamics of the sector and identifies a number of areas where government and industry can work together to improve the quality and viability of the sector for the long term. We hope that the wider attractions community will respond equally positively to the findings, summarised in this leaflet.

Alan Britten
Chairman, English Tourism Council

Introduction

The Government's tourism strategy *Tomorrow's Tourism* identified a need to 'improve the quality and range of tourist attractions in the UK' as part of the drive to maintain the UK's competitiveness in world tourism. However, several factors have led to concern among attractions over their long-term viability, with implications for the sector's ability to improve the quality of the visitor experience. For example:

- Demand for attractions is slowing. Although the overall number of visits has grown by 14% over the last ten years, this is less than the 24% in the previous ten years (see Figure 1).
- The average number of visits per attraction is declining, yet supply is increasing, indicating that supply may be outstripping demand (see Figure 2).
- There is increasing competition for consumer leisure time and spend.
- Consumer leisure patterns are changing.
- Domestic holiday patterns are changing.
- The number of European visitors has recently been declining.
- Lottery and EU funding has stimulated an increase in the supply of new attractions.
- Private sector attractions (which are largely ineligible under Lottery funding criteria) are struggling to raise private investment.
- The Government's free/reduced price admissions policy at national museums and galleries is likely to displace some visitors from admission-charging attractions.
- There is uncertainty over the potential effect on local authority attractions (which are a discretionary service) of requirements to demonstrate 'Best Value' in service provision.

The English Tourism Council (ETC) has consulted with representatives of attractions and sectoral bodies, the Department for Culture, Media and Sport (DCMS), Regional Tourist Boards (RTBs) and others to develop its new strategy Action for Attractions which was launched on 16 November 2000.

The strategy aims to improve understanding of the dynamics of the attractions sector and its vulnerability to changes in demand and increased competition. It identifies a number of areas where government and industry can work together to improve the quality and viability of the sector for the long term. The ETC proposes the formation of a new cross-sectoral attractions' advisory group to oversee the implementation of this strategy and encourage co-ordination, co-operation and information sharing across the sector.

This leaflet outlines the key issues facing the sector and the main recommendations. The detailed recommendations can be found in the full report, which is available from ETC.

Figure 1 Slowdown in number of visits % change – England

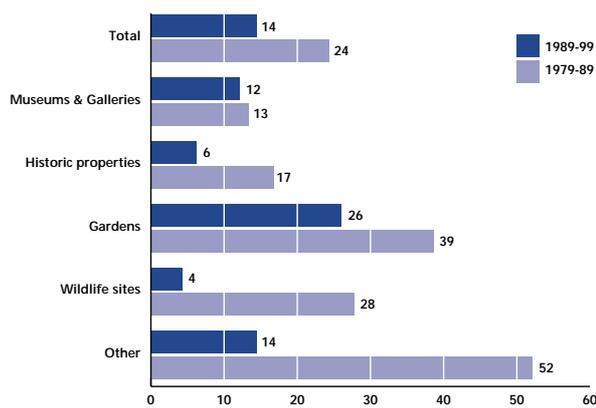
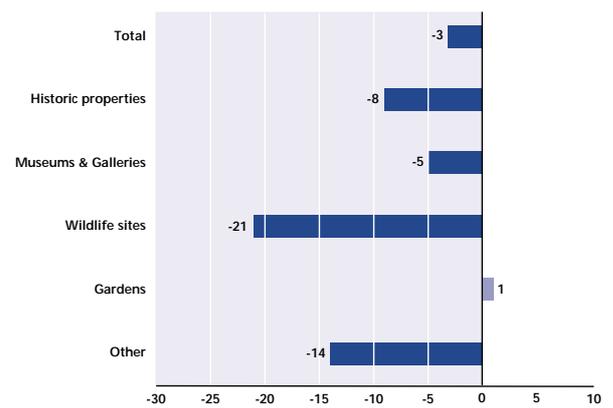


Figure 2 % change in average number of visits per attraction (UK) 1989-99



The attractions sector

England's 4,500 visitor attractions:

- Span a diverse range including farms, steam railways and theme parks, historic properties and gardens, museums and galleries, country parks and wildlife attractions, visitor centres and workplace attractions.
- Have come into existence for various reasons, including:
 - preservation of the country's heritage, culture and environment
 - to enhance local facilities for residents and attract tourism
 - as catalysts for economic regeneration
 - to generate additional income for historic properties, farms and manufacturing plants
 - entertainment.
- Are generally owned and operated by the private sector and not-for-profit organisations. The public sector – government agencies and local authorities – makes up only a third of attraction owners.
- Are mostly small businesses attracting fewer than 20,000 visits a year.
- Around 40% do not charge for admission.
- Tend to have a high proportion of fixed costs and narrow operating margins, leaving little money for reinvestment in the product.
- Operate below capacity most of the time.
- Are usually seasonal outside the main urban areas.
- Are often reliant on the services of volunteers.
- Lack a single voice.

Some sub-sectors have fared better than others over the past decade (see Figures 3 and 4), including:

- government-owned attractions
- those offering free admission
- those opened since 1980
- those attracting a high proportion of overseas visitors.

Figure 3 Visit trends % change 1989-99

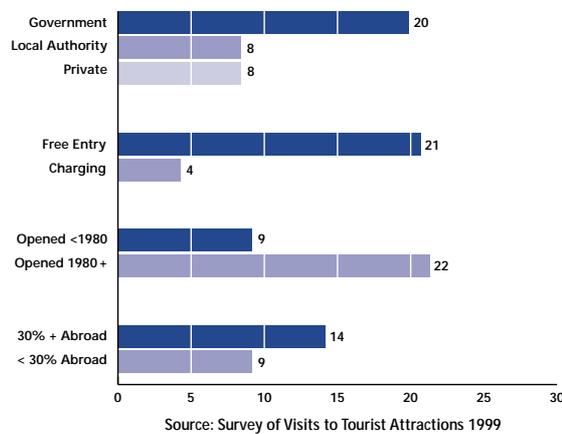


Figure 4 UK Visitor trends 1989 to 1999 – % change

Farms	+81
Visitor centres	+57
Gardens	+23
Country parks	+21
Steam Railways	+14
Museums & Galleries	+14
Workplaces	+13
Leisure parks	+11
Historic properties	+8
Wildlife attractions	+3
Total	+14

Source: Survey of Visits to Tourist Attractions 1999

Improving market understanding

Current statistics on attractions supply and visitor demand are inadequate. Supply information and market measurement needs to be more comprehensive and more reliable, provide more sub-sector analysis and be disseminated more widely and faster. Greater involvement and co-operation is needed from attractions to improve data quality and speed of turnaround of results.

Main recommendations

- ETC will seek new tenders for the main industry source of attractions statistics, the *Survey of Visits to Tourist Attractions* and the report *Sightseeing in the UK*. As part of this process, ways to address the perceived weaknesses of the current statistics will be sought. These will be reported to DCMS for discussion.
- ETC will discuss with DCMS how demand for attractions could be measured more reliably and regularly – possibly through an expanded Leisure Day Visits Survey – and the cost implications.

Increasing visitor satisfaction

All attractions must attract and satisfy visitors to survive. With rising standards of living and increasing familiarity with new technology, visitors' expectations are rising. Therefore, attractions must be able to improve their standards and refresh their product/presentation.

The small-scale nature of many attractions means it can be difficult for them to keep abreast of best practice elsewhere and to see how they compare. Wider dissemination of information and guidance is needed on:

- best practice in information provision, presentation/interpretation techniques and customer care
- the opportunities offered by new technology
- developing the potential for educational visits
- widening access
- the implications of the final phase of the Disability Discrimination Act (DDA) coming into force in 2004.

Main recommendations

- Industry training organisations should develop advanced customer care training, building on the success of Welcome Family, and make this available across the sector.
- The ETC, RTBs, sectoral organisations, DCMS and the Department for Education and Employment (DfEE) should work together, as appropriate, to help attractions develop their educational potential, to provide specific advice on the implications of the DDA for attractions, to develop guidance and to signpost IT initiatives.

Improving attractions' management skills

Most attractions are small businesses, often lacking the resources to pay for full-time experienced attraction managers or for their professional development. Many are highly dependent on the services of volunteers. An ETC audit of the difficulties faced by attraction managers is currently underway and has reported some interim findings.

Main recommendations

- There is a need to co-ordinate training and continuous professional development across the whole sector, to provide a one-stop shop as a source of information and to improve the quality of trainers from advisory organisations, such as Training and Enterprise Councils (TECs) and Business Links.
- The audit report should be circulated to the DCMS, DfEE, RTBs and National Training Organisations (NTOs), which will be invited to take the report's recommendations forward.

Stronger performance through benchmarking

Benchmarking is an effective way of:

- identifying the processes that deliver best practice
- enabling management to compare an attraction's performance against that of its competitors across a range of indicators
- identifying opportunities for improvement.

Benchmarking exercises are being carried out by a number of organisations, such as the Association of Independent Museums (AIM), the Association of Leading Visitor Attractions (ALVA), the Cultural Heritage National Training Organisation (CHNTO) and the Southern Tourist Board (STB).

Main recommendations

- The proposed attractions advisory group will be asked to lead initiatives to raise awareness and increase co-ordination and harmonisation between benchmarking schemes.

Raising quality

Visitors seek, recognise and appreciate good quality in the attractions they choose to visit. For this reason, in 1991 the English Tourist Board (ETB) agreed its Visitors' Charter as the basis for nationally agreed standards.

Although attractions have made great strides in meeting visitors' higher expectations, standards still vary. The ETC is leading initiatives to develop a quality assessment service to help improve standards among attractions and provide reassurance to visitors. The East of England Tourist Board (EETB) is developing this service, in co-operation with the Heart of England Tourist Board and South West Tourism, and with the support of ETC.

Main recommendations

- ETC will support the development of the Visitor Attractions Quality Assurance Service (VAQAS) being developed by EETB, and liaise with the proposed attractions advisory group to ensure that sectoral organisations are aware of the initiative and that their views are taken on board.

Improved funding and investment

Private and public sector funding are needed for investment to improve quality, training, marketing, presentation and access in attractions. In considering funding issues there are a number of aspects to be aware of:

- The uncertain revenues, longer return on investment time and lower returns on capital than in other sectors can make fundraising difficult.
- The costs of maintenance, restoration and refurbishment at many heritage attractions often cannot be fully recouped from admissions income and trading.
- The pricing of commercial attractions is constrained by competition from free entry attractions.
- Publicly owned attractions are not allowed to borrow.
- Private sector attractions are largely ineligible for Lottery funding.
- The private sector is losing some visitors and key staff to new attractions developed with the aid of Lottery and EU funding.
- There is concern among the private sector that there may be future subsidy of publicly developed attractions which fail to reach visitor and revenue projections.

Main recommendations

- Priority should be given to supporting bids for improvements to existing attractions rather than creating new attractions.
- Priority should be given to attractions that are appropriate to the local area and culture.
- More realistic assessments need to be made of the number of visitors, revenues and costs of potential grant-aided projects and their likely impact on existing attractions.

Taxation

The range of taxes and tax reliefs applying to attractions is as diverse as the sector. In general, attractions-related taxation and fiscal policy must be seen in the light of overall tax regimes and should concentrate on a small number of key issues that are likely to have the most widespread benefit.

The tax regime should encourage reinvestment, recognise particular needs and improve the financial benefits from charitable donations.

Main recommendations

- ETC will advocate incentives for investment so that any changes to the tax system encourage reinvestment.

More effective, efficient development and planning

The land use planning system can deter acceptable and beneficial reinvestment, upgrading and product enhancement. Many operators of smaller attractions have difficulty with, or are daunted by, the planning system and are discouraged by delays.

There are at least 13 national Planning Policy Guidance notes (PPGs) with some relevance to tourism. Any recommendations for attractions must be looked at within the context of an integrated set of measures that take account of all elements of tourism supply.

Main recommendations

- There is a need to encourage a clear understanding of the context for attraction developments among planners and others at the national, regional and local levels.
- The ETC will encourage government to revise Planning Policy Guidance Note 21 to include updating Section 5.4 on large-scale attractions.
- Backed by policy support from ETC, the RTBs should work with local authorities to examine the impact of tourism proposals and encourage better regional co-ordination.

Increased co-ordination and co-operation

The attractions sector is characterised by its diversity and range of sectoral associations. There is no overall liaison mechanism linking all types and sizes of attraction.

Main recommendations

- ETC will consult with sectoral organisations and RTBs with a view to setting up a new cross-sectoral attractions advisory group.

Useful contacts

	English Tourism Council	Tel: 020 8563 3000
Regional Tourist Boards	Cumbria Tourist Board East of England Tourist Board Heart of England Tourist Board London Tourist Board Northumbria Tourist Board North West Tourist Board South East England Tourist Board Southern Tourist Board South West Tourism Yorkshire Tourist Board	Tel: 01539 444444 Tel: 01473 822922 Tel: 01905 761100 Tel: 020 7932 2000 Tel: 0191 375 3000 Tel: 01942 821222 Tel: 01892 540766 Tel: 02380 625400 Tel: 0870 442 0830 Tel: 01904 707961
Regional Development Agencies	Advantage West Midlands East of England Development Agency East Midlands Development Agency North West Development Agency One North East South East of England Development Agency South West of England Development Agency Yorkshire Forward	Tel: 0121 380 3500 Tel: 01223 713900 Tel: 0115 988 8300 Tel: 01925 644734 Tel: 0191 261 2000 Tel: 01483 484226 Tel: 01392 214747 Tel: 0113 243 9222
National Training Organisations	Cultural Heritage NTO (museums, galleries and heritage) METIER (arts and entertainment) SPRITO (sport, recreation, leisure parks & piers) TTENTO (travel, tourism and events)	Tel: 0127 439 1092 Tel: 0127 473 8800 Tel: 020 7388 7755 Tel: 0193 234 5835
Trade Associations	Association of Independent Museums (AIM) Association of Leading Visitor Attractions (ALVA) Association of Pleasure Craft Operators British Association of Leisure Parks, Piers & Attractions (BALPPA) Federation of City Farms and Community Gardens Federation of Zoological Gardens of Great Britain & Ireland Heritage Railway Association Historic Houses Association (HHA) Museums Association National Churches Tourism Group National Farm Attractions Network (NFAN) Pilgrims Association Re:source (The Council for Museums, Archives & Libraries) UK Vineyards Association	Tel: 020 8983 5222 Tel: 020 7222 1728 Tel: 01952 813572 Tel: 020 7383 7942 Tel: 0117 923 1800 Tel: 020 7586 0230 Tel: 01707 643568 Tel: 020 7259 5688 Tel: 020 7608 2933 Tel: 01865 331124 Tel: 01536 513397 Tel: 01227 454134 Tel: 020 7273 1444 Tel: 01728 638080
Lottery Distributors	Arts Lottery Fund Heritage Lottery Fund Millennium Commission National Endowment for Science, Technology & the Arts (NESTA) New Opportunities Fund Sport England Lottery Line	Tel: 020 7333 0100 Tel: 020 7591 6000 Tel: 020 7880 2001 Tel: 020 7645 9500 Tel: 0845 000 0121 Tel: 08457 649 649
Other Organisations	Business Links Signpost Department for Culture, Media and Sport Local Government Association Small Business Service (general enquiries) Tourism Management Institute	Tel: 0845 756 7765 Tel: 020 7211 6200 Tel: 020 7834 2222 Tel: 0114 259 7788 www.tmi.org.uk

A copy of the full strategy Action for Attractions costs £10.00 plus £3.50 to cover postage and packing and is available from:

English Tourism Council
Fulfilment Centre
PO Box 22489
London W6 9FR

Customer service hotline: 0870 606 7204
Fax: 020 8563 3048
E-mail: fulfilment@englishtourism.org.uk
Web: www.englishtourism.org.uk

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Thames Tower
Black's Road
London W6 9EL

Tel: 020 8563 3000
Fax: 020 8563 0302
www.englishtourism.org.uk

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