What’s the big attraction? Visitor attractions achieving 1 million visitors per annum

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Origins and Context

- Review those built attractions achieving 1m plus visitors
- Better understand ‘top end’ performers
- Management and operation
- Common characteristics

Origins and Context

- Excluding Natural Attractions such as Mountains and Country Parks where visitation more difficult to verify
- E.g Strathclyde Country Park reports 5.3 million visitors in a country with a population of 5.3 million
- Lets review economy and tourism

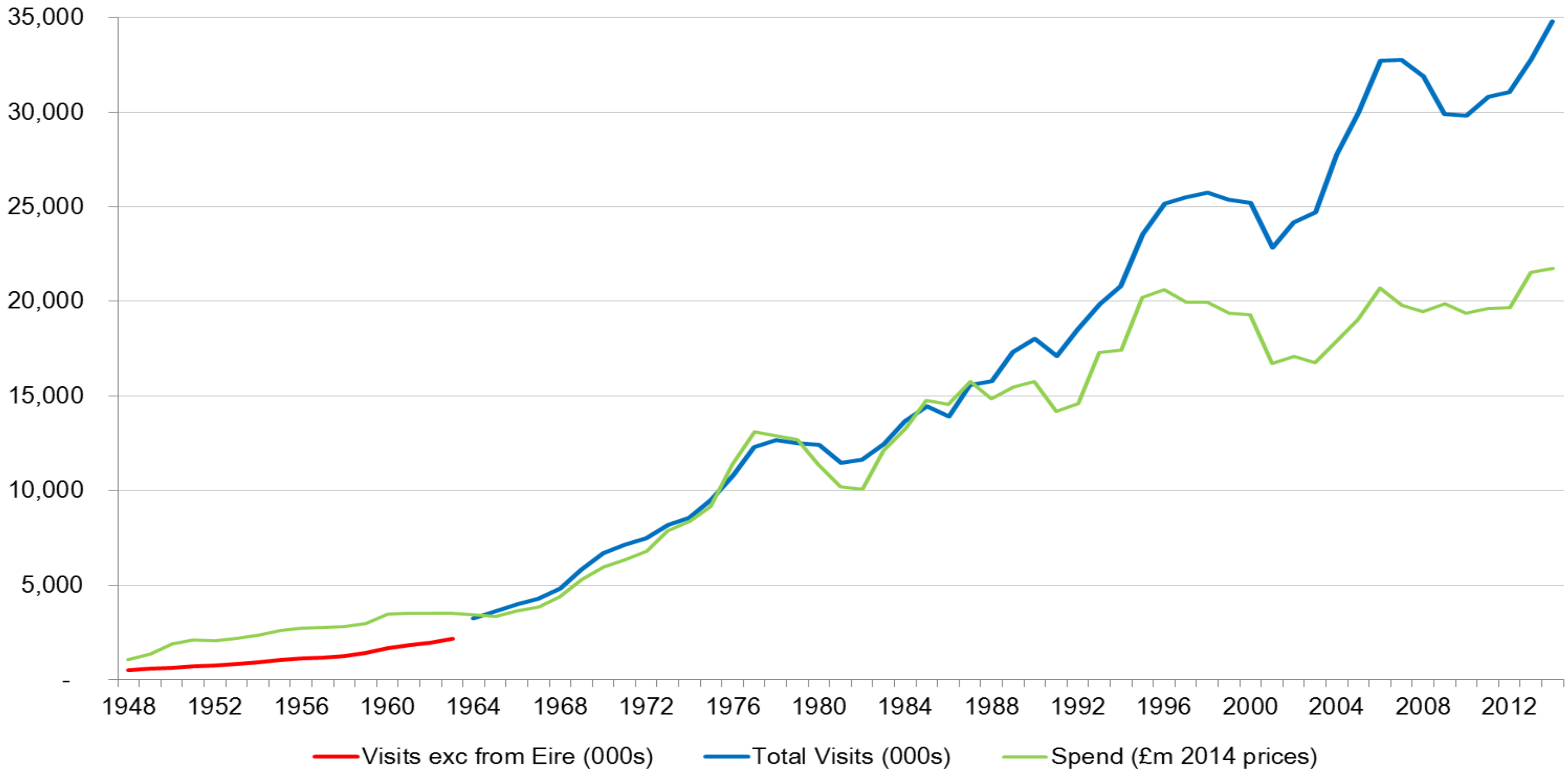
UK Tourism and the Economy

% Growth	2013	2014	2015
Real GDP Growth	1.7	2.8	2.4

UK Economy and Tourism

- UK economy characterised by slow growth
- UK arrivals impacted by the Olympics 2012 and the positive perception of UK evident in 2013 and 2014 arrivals

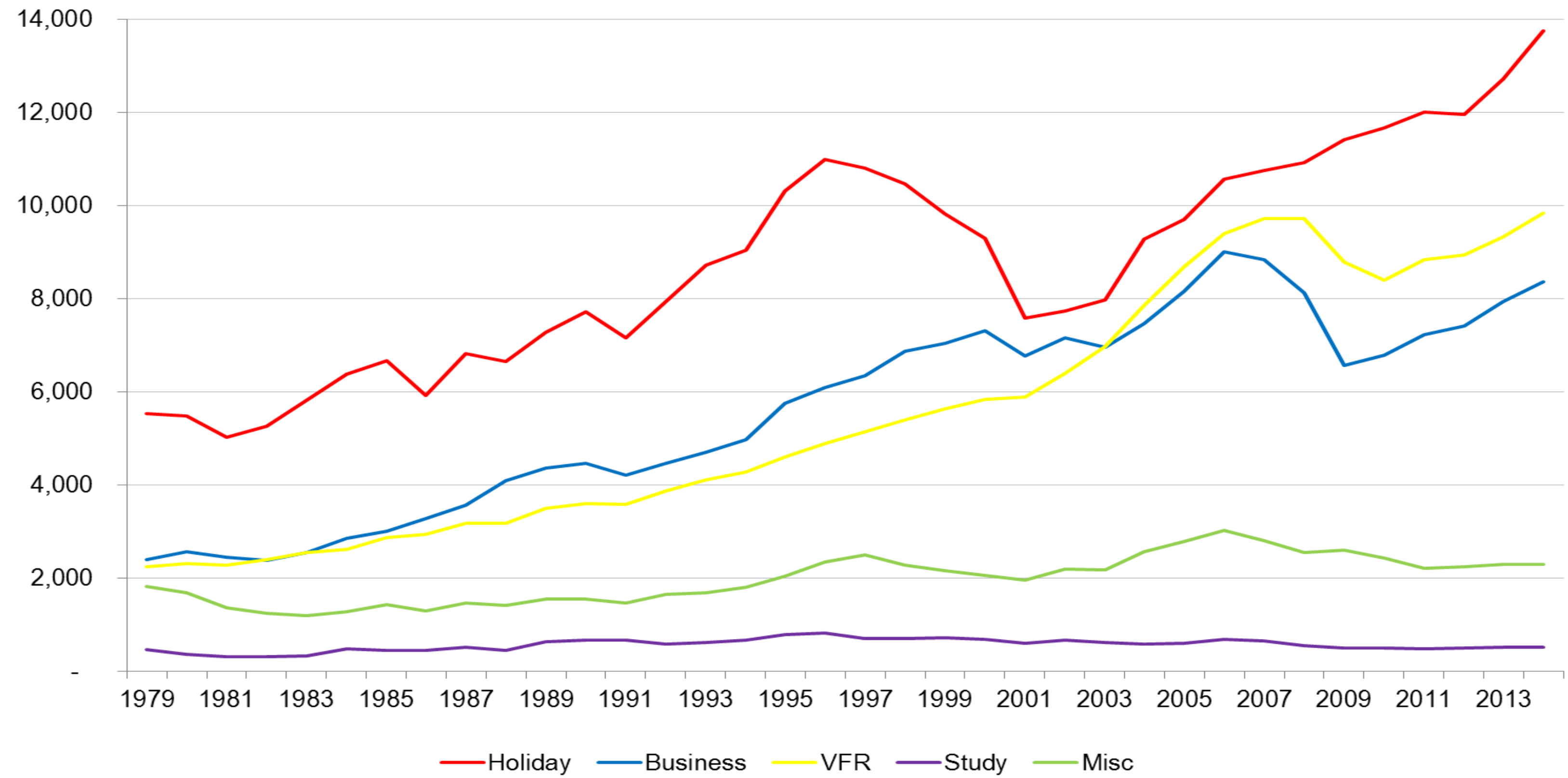
Inbound to Britain: Volume and Value



UK Economy and Tourism

- Strong £ v Euro makes destination expensive for European visitors
- Sharing economy options such as Airbnb and private rentals showing best growth

Change in purpose composition (000s of visits)



UK Economy and Tourism

- London v Rest of the UK
- London 17.3 m international arrivals
- London 11.4 m domestic arrivals

- Scotland 2.7 m International
- Scotland 12.8 m Domestic

Scotland Tourist Trips*
(Extracted from VisitScotland; Scotland The key facts on tourism 2014-2006)
*A tourist trip is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business and conference trips or any other purpose except such as boarding education or semi-permanent employment
** Scotland, England, Northern Ireland and Wales
Axis Title
0
2
4
6
8
10
12
14
16
18
2006 (m)
2007 (m)
2008 (m)
2009 (m)
2010 (m)
2011 (m)
2012 (m)
2013 (m)
2014 (m)
16.01
15.91
14.63
15.03
14.71
16.05
15.31
14.79
15.52
13.26
13.12
12.15
12.47
12.37
13.7
13.08
12.35
12.82
2.73
2.79
2.48
2.56
2.34
2.35
2.23
2.44
2.7
Total GB **
Total Overseas
Grand Total

Visitor Attractions

- Since 1999 Moffat Centre has undertaken analysis and collation of monthly and annual performance of Scottish Visitor Attractions
- In addition at various times have undertaken similar analysis for England, Wales and Northern Ireland









National Trust

English Heritage

Houses of Parliament

Titanic Belfast.

Historic Scotland
Alba Aosmhor

The Churches Conservation Trust

Domine Dirige Nos
City of London

Canterbury cathedral

Tower Bridge Exhibition

the National Trust for Scotland
a place for everyone

Historic Royal Palaces

Royal Collection Trust

Old Royal Naval College Greenwich

Shakespeare birthplace trust

The Roman Baths Bath

St Paul's Cathedral

Westminster Abbey
Founded 960

Canal & River Trust
keeping people, nature & history connected









V&A

HORNIMAN
MUSEUM
& GARDENS

THE
BRITISH
MUSEUM

THE
NATIONAL
MUSEUM
ROYAL
NAVY

NATIONAL
FOOTBALL
MUSEUM

BRITISH
LIBRARY

National
Portrait
Gallery

IWM
WAR
IMPERIAL
MUSEUMS

NATURAL
HISTORY
MUSEUM

UNIVERSITY OF
OXFORD

ROYAL
MUSEUMS
GREENWICH

National Museums Liverpool

TATE

SCIENCE
MUSEUM

THE
NATIONAL
GALLERY

BM
Birmingham
Museums

MUSEUM
OF LONDON

NATIONAL
GALLERIES
SCOTLAND

RA
Royal
Academy
of Arts

National
Museums
Scotland

Glasgow
museums

ROYAL
AIR FORCE
museum

AT
SOMERSET
HOUSE

The
Mary
Rose

REWRITING THE BOOK
THE LIBRARY OF BIRMINGHAM

UNIVERSITY OF CAMBRIDGE
MUSEUMS
& BOTANIC GARDEN

UK 2014

- More people visited the V&A, the Natural History Museum and the Science Museum, combined, than visited Venice

- More people visited the British Museum and the National Gallery, combined, than visited Barcelona

UK 2014

- More people visited the Southbank Centre, Tate Modern and Tate Britain, combined, than visited Hong Kong

- More people visit heritage properties in the UK every weekend than attend football matches.

Association of Leading Visitor Attractions

- 57 members achieving 1 million visitor per year at a single or group of attractions
- Nearly 30% of all day visits made in the UK are to visitor attractions
- Increasing number of overseas visitors (despite weakness of the Euro)

Nature of Appeal

- Overseas visitors are primarily drawn by history, heritage and tradition
- Underpinned by authenticity, language and history alongside modernity (music, design, fashion, city life, films).
- London theatre bookings only rose 1% in 2014, but ALVA member attractions’ visitor numbers across the UK rose by 6.5% (London +7.11%)

Attractions with over 1 million visitors 2010 – 2014

Attraction	Address	2010 (37)	2011 (39)	2012 (40)	2013 (42)	2014 (44)
British Museum	Great Russell Street, London	5,842,138	5,848,534	5,575,946	6,701,036	6,695,213
Blackpool Pleasure Beach	525 Ocean Boulevard, Blackpool	5,495,200	5,495,600	5,502,800	5,539,500	5,727,500
Tate Modern	Bankside, London	5,061,172	4,886,769	5,318,688	4,884,939	5,785,427
The National Gallery	Trafalgar Square, London	4,954,914	5,253,216	5,161,902	6,031,574	6,416,724
Natural History Museum	Cromwell Road, London	4,647,613	4,873,275	5,021,762	5,356,884	5,388,295
London Eye	Riverside Building, County Hall, Westminster Bridge Road, London	3,804,400	3,840,600	4,064,600	3,247,300	3,171,200
Science Museum	Exhibition Road, South Kensington	2,751,902	2,917,500	2,989,000	3,316,000	3,356,072
Alton Towers	Alton	2,657,000	2,645,100	2,407,500	2,037,500	1,876,800
V&A South Kensington	Cromwell Road, London	2,629,065	2,789,400	3,231,700	3,290,500	3,180,450
National Maritime Museum	Park Row, Royal Borough of Greenwich, London	2,419,802	848,080	1,128,944	1,437,725	1,516,258

Kew	Richmond, Surrey	1,141,973	1,188,933	1,023,501	1,324,499	1,368,565
Kelvingrove Art Gallery and Museum	Argyle Street, Glasgow	1,070,521	981,787	1,042,411	1,044,067	1,121,995
Imperial War Museum	Lambeth Road, London	1,069,358	973,445	957,952	360,886	914,774
Loch Lomond Shores	Ben Lomond Way, Balloch, Alexandria	1,055,523	1,097,445	1,125,496	1,140,119	1,172,832
The Roman Baths	Stall Street, Bath	1,054,621	1,130,857	1,064,177	1,135,007	1,143,633
Canterbury Cathedral	11 The Precincts, Canterbury	1,033,463	1,039,922	969,088	1,001,266	1,003,847
Merseyside Maritime Museum	Albert Dock, Liverpool	1,027,475	883,295	845,709	622,516	631,710
ZSL London Zoo	Regent's Park, London	1,011,257	1,090,741	974,433	1,294,483	1,318,621
Stonehenge	A344, Amesbury, Wiltshire	1,009,973	1,099,656	1,043,756	1,241,296	1,346,177
Eden Project	Bodelva, Cornwall	1,000,511	1,001,774	953,688	858,897	867,362
Scottish National Gallery	The Mound, Edinburgh	969,187	925,574	961,311	933,296	1,295,015
RHS Garden Wisley	Wisley Lane, Wisley	803,986	1,032,872	977,451	964,078	1,023,715
Houses of Parliament	Parliament Square, London	703,255	1,054,151	1,024,890	1,041,000	1,253,326

Tower of London	Tower Hill, London	2,414,541	2,554,746	2,444,296	2,894,698	3,075,950
Hylands House	Hylands Park, London Road, Chelmsford, Essex	2,204,100	2,185,700	2,032,300	2,005,700	1,973,900
Thorpe Park	Staines Road, Chertsey, Surrey	1,992,800	1,998,400	1,813,400	1,782,800	1,715,000
Legoland	Winkfield Road, Windsor, Berkshire	1,902,200	1,904,700	2,001,000	1,910,200	1,941,500
St Paul's Cathedral	Ludgate Hill, London	1,892,467	1,819,925	1,789,974	2,138,130	1,782,741
National Portrait Gallery	St Martin's Place, London	1,819,442	1,880,104	2,096,858	2,014,636	2,062,502
Tate Britain	Millbank, London	1,665,291	1,488,358	1,534,781	1,378,272	1,357,878
British Library	96 Euston Road, London	1,454,612	1,484,900	1,413,967	1,475,382	1,627,599
Westminster Abbey	20 Deans Yard, London	1,394,427	1,899,956	1,776,369	2,020,637	1,190,737
Old Royal Naval College	King William Walk, Greenwich, London	1,274,957	1,671,000	1,778,019	1,803,477	1,749,708
Flamingo Land	Kirby Misperton, Malton, North Yorkshire	1,268,100	1,436,300	1,500,800	1,400,800	1,391,400
Edinburgh Castle	King's Stables Road, Edinburgh	1,210,248	1,302,825	1,230,177	1,420,027	1,480,676
Chester Zoo	Upton-by-Chester, Chester	1,154,285	1,425,319	1,405,233	1,409,249	1,432,867

National Museum of Scotland	Chambers Street, Edinburgh	619,254	1,466,573	1,893,521	1,768,090	1,639,509
Southbank Centre	Belvedere Road, London					6,255,799
Somerset House	150 Strand, London				2,398,066	2,463,201
The Library of Birmingham	Centenary Square, Broad Street, Birmingham				1,152,556	2,414,860
Museum of London	London Wall, London					1,167,070
Royal Academy of Arts	Burlington House, Piccadilly, London			1,200,000	1,015,505	824,793
Museum of Liverpool	Pier Head, Liverpool Waterfront, Liverpool		667,526	1,011,056	756,582	707,405
Riverside Museum	Pointhouse Place, Glasgow		1,068,986	1,008,092	740,276	1,049,834
TOTAL VISITOR NUMBERS		**75,481,033**	**79,153,844**	**81,296,548**	**86,289,451**	**96,880,440**

Key

ALVA Website 2014 - 2010 Visitor Numbers (http://www.alva.org.uk/details.cfm?p=423)

Moffat Centre Visit Attraction Monitors 2014-2011 (extracted from the Moffat Centre Visitor Attraction Monitors 2011 – 2014)

(GCU Library) Travel: Euromonitor from trade sources/national statistics (http://www.portal.euromonitor.com/portal/statistics/tab**)**

>1 Milion Visitors

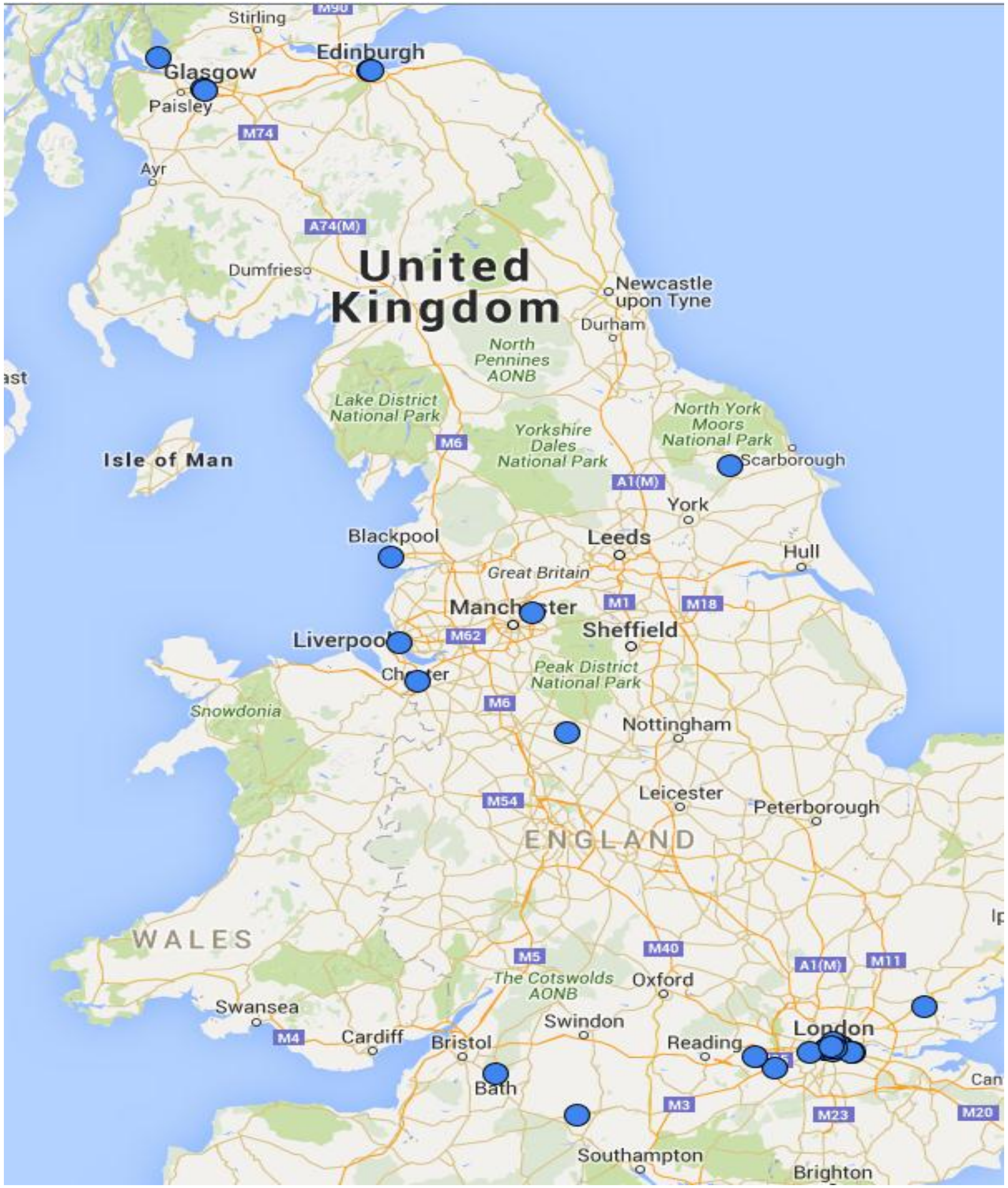
New attraction to ALVA

New attraction to Moffat Centre

Visitor Attractions achieving 1 Million plus Visitors 2010

Visitor Attractions achieving 1 Million plus Visitors 2011

Visitor Attractions achieving 1 Million plus Visitors 2012



Visitor Attractions achieving 1 Million plus Visitors 2013

Visitor Attractions achieving 1 Million plus Visitors 2014

Attractions achieving 1 million plus visitors per annum

Years	No of UK attractions achieving 1 m + visitors per annum	London / South East England
2010	37	26 (70%)
2011	39	24 (61%)
2012	40	23 (57.5%)
2013	42	28 (67%)
2014	44	29 (66%)

Individual Attractions achieving 2 million plus visitors per annum

Year	Visitor Attractions Achieving 2 m plus	London / South East of England
2010	12	10 (83%)
2011	11	9 (82%)
2012	13	11 (85%)
2013	15	13 (87%)
2014	13	11 (85%)

Type of Attractions achieving 1m+

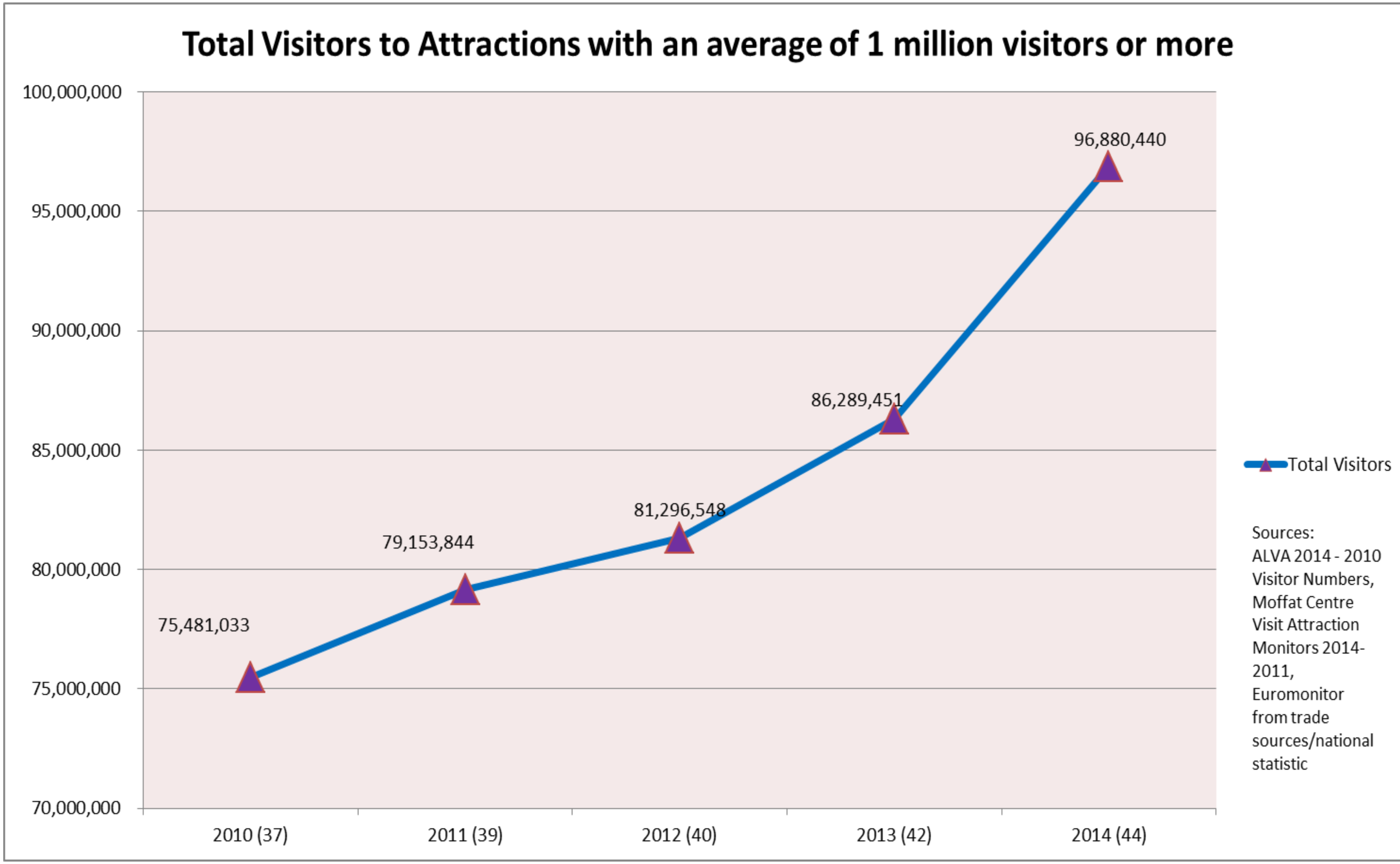
Year	Museum and Galleries	Theme Parks	Zoo	Built Heritage (castles, historic houses etc)	Religious Buildings	Botanic	Other
2010	12	5	3	8	3	2	1
2011	10	5	3	9	3	3	1
2012	12	5	2	9	2	1	1
2013	11	5	3	11	3	2	1
2014	14	5	3	12	3	1	1

Paid v Free Attractions achieving 1m+

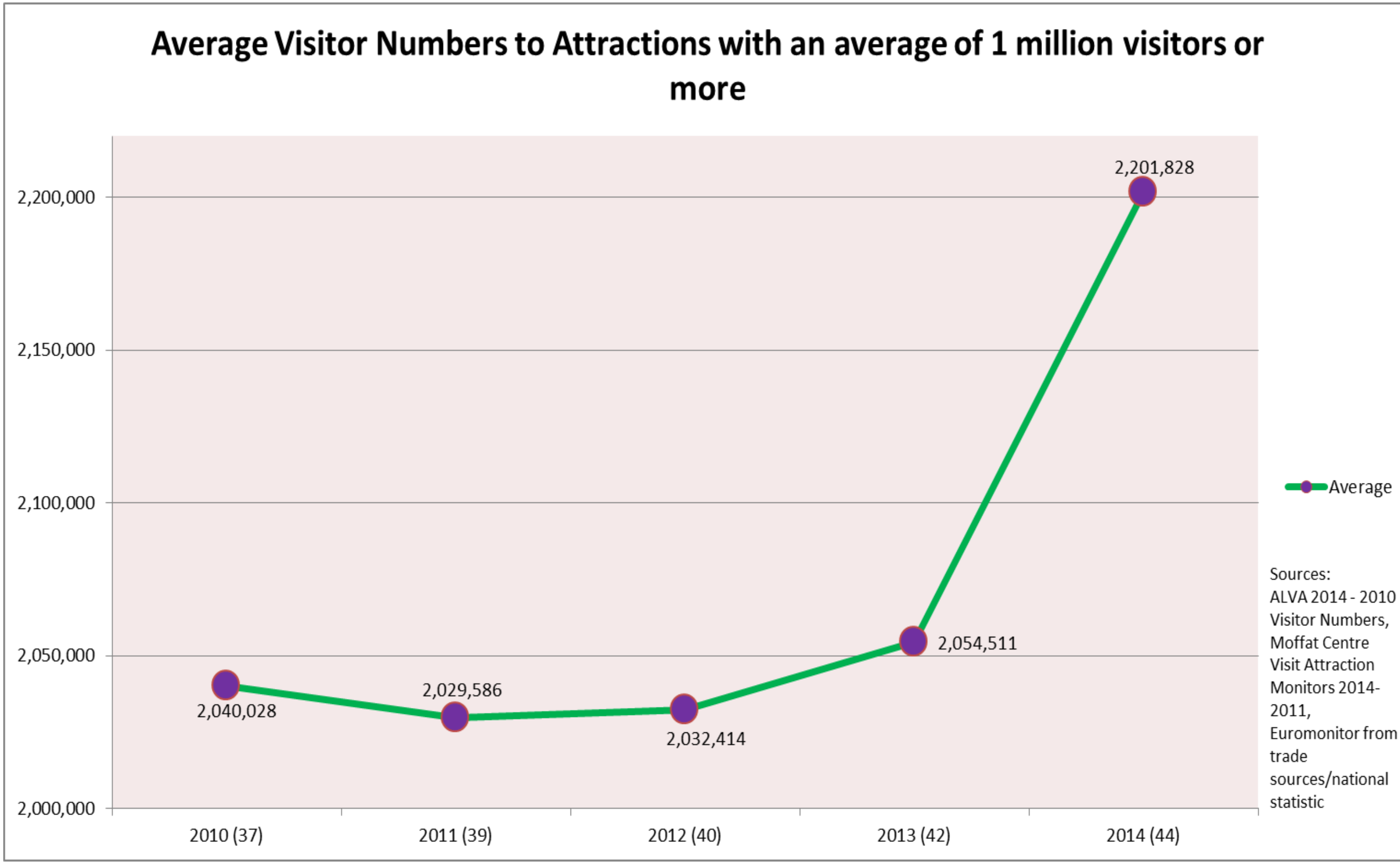
Year	Museum and Galleries	Theme Parks	Zoo	Built Heritage (castles, historic houses etc)	Religious Buildings	Botanic	Other
2010	12 F	5	3	8	3	2	1
2011	10 F	5	3	9	3	3	1
2012	12 F	5	2	9	2	1	1
2013	11 F	5	3	11	3	2	1
2014	14 F	5	3	12	3	1	1

Enduring Appeal

- Museums and Galleries (Free Admission)
- Everything else (Paid Admission)



Total Visitors to Attractions with an average of 1 million visitors or more
100,000,000
95,000,000
90,000,000
85,000,000
80,000,000
75,000,000
70,000,000
2010 (37)
2011 (39)
2012 (40)
2013 (42)
2014 (44)
75,481,033
79,153,844
81,296,548
86,289,451
96,880,440
Total Visitors
Sources:
ALVA 2014 - 2010 Visitor Numbers, Moffat Centre Visit Attraction Monitors 2014-2011, Euromonitor from trade sources/national statistic


Average Visitor Numbers to Attractions with an average of 1 million visitors or more
2,200,000
2,150,000
2,100,000
2,050,000
2,000,000
2,201,828
2,054,511
2,029,586
2,040,028
2,032,414
2010 (37)
2011 (39)
2012 (40)
2013 (42)
2014 (44)
Average
Sources:
ALVA 2014 - 2010 Visitor Numbers, Moffat Centre Visit Attraction Monitors 2014-2011, Euromonitor from trade sources/national statistic

Popularity

- Importance of location
- Dominance of London and South
- Appeal of Free Admission to Tourists and Day Visitors
- Continued volume to paid attractions:
- Built heritage, theme parks, zoos, botanic, religious all have appeal

Major Reinvestment in last 10 years

Year	Museum and Galleries	Theme Parks	Zoo	Built Heritage (castles, historic houses etc)	Religious Buildings	Botanic	Other
2010	12 (10)	5	3	8	3	2 (2)	1
2011	10 (8)	5	3	9 (8)	3	3 (2)	1
2012	12 (10)	5	2	9 (8)	2	1 (1)	1
2013	11 (10)	5	3	11 (10)	3	1 (1)	1
2014	14 (11)	5	3	12 (11)	3	2 (2)	1

Reinvestment Cycles

- Theme Parks (12-18 month cycle)
- Theme Parks investment funded from profitability
- Museums and Galleries (largely funded from HLF, ALF, Millennium etc.)
- Others largely grant funded

Management Characteristics

- Use of digital marketing, social media
- Price volume discounts
- Yield management
- Investment in exhibitory elements to create dynamic appeal
- Joint investment and touring
- Diversification extending revenue generation

Historic Royal Palaces

Look again, Think again

- “Blood Swept Lands and Seas of Red”
- Historic Royal Palaces
- 1 FT member of management team worked on the project
- 888,246 poppies sold = £9.4m to 6 charities
- Over 5m visitors
- 30,000 volunteers
- 13% increase in paid visitors to the Tower
- Only 43 posts on Facebook; generated 84,000 new followers, 40million impressions on Facebook, a reach of 18million people
- £1.5billion advertising equivalent
- Considerable reputational risk and stakeholder management
- A brand-stretching exercise; new audiences
- Greatest secular pilgrimage in modern times

Knight's Glamping at Leeds Castle

Leeds Castle offers families and couples the chance to escape to the countryside for a glamorous camping holiday with a difference. Eight splendid striped pavilions based on a Medieval design, form a 'village' on the one-acre Castle vineyard.

Special Offer

Monday to Thursday

From Monday 20th April to Thursday 30th April 2015

BOOK NOW »

Book Online

To check availability or book online

Book Now »

Awards

the Beautiful South

AWARDS FOR EXCELLENCE 2013 - 2014



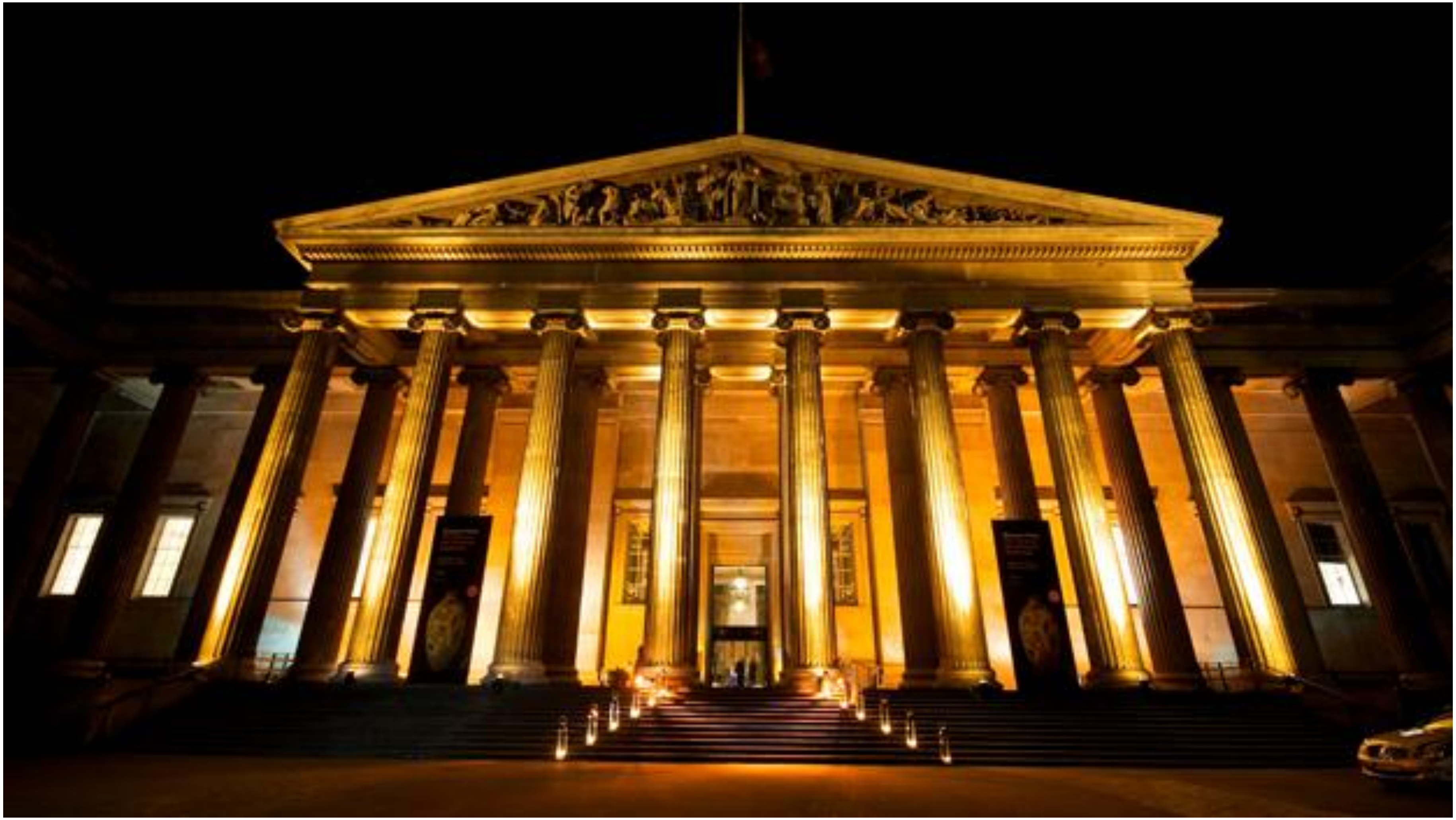




Global Top Attraction

- Louvre 10 million per annum
- Vatican 6 million per annum
- Volume impacts on art and simulations being created
- British Museum 6.7 million per annum


M·PRINCIPIS·APOST·PAVLVS·V·BVRG IVS·ROMANVS·PONT·MAX·AN·MDCXII
STOP



Volume and Yield

- Extend the product
- Early and Late Opening to relieve 11-3
- Museum del Praedo, Madrid open until 8.00pm (7 days)
- Tate Modern 5.7 million Friday – Saturday until 10.00pm
- Blockbuster Exhibitions 36 hour opening continuous

Understanding of Yield is limited

- Ski industry segmenting : economy and luxury
- “First Tracks” premium prices for early access to slopes before it opens to the public
- Ski in Ski out hotels
- How many times do you touch your boots ?
- Instruction by Olympians
- Application to attractions : Disney, Universal and Merlin

TRENDS

THE INSIDE STORY FOR BUSINESS TRAVELLERS

READ ON

David Mattin examines instant skills

Alexander Garrett on basement conversions

IN THE AIR

'As we travel more, culture and art are ever more central to how we construct our identities'

2 MINS

From cobwebs to cool – why museums are suddenly fashionable

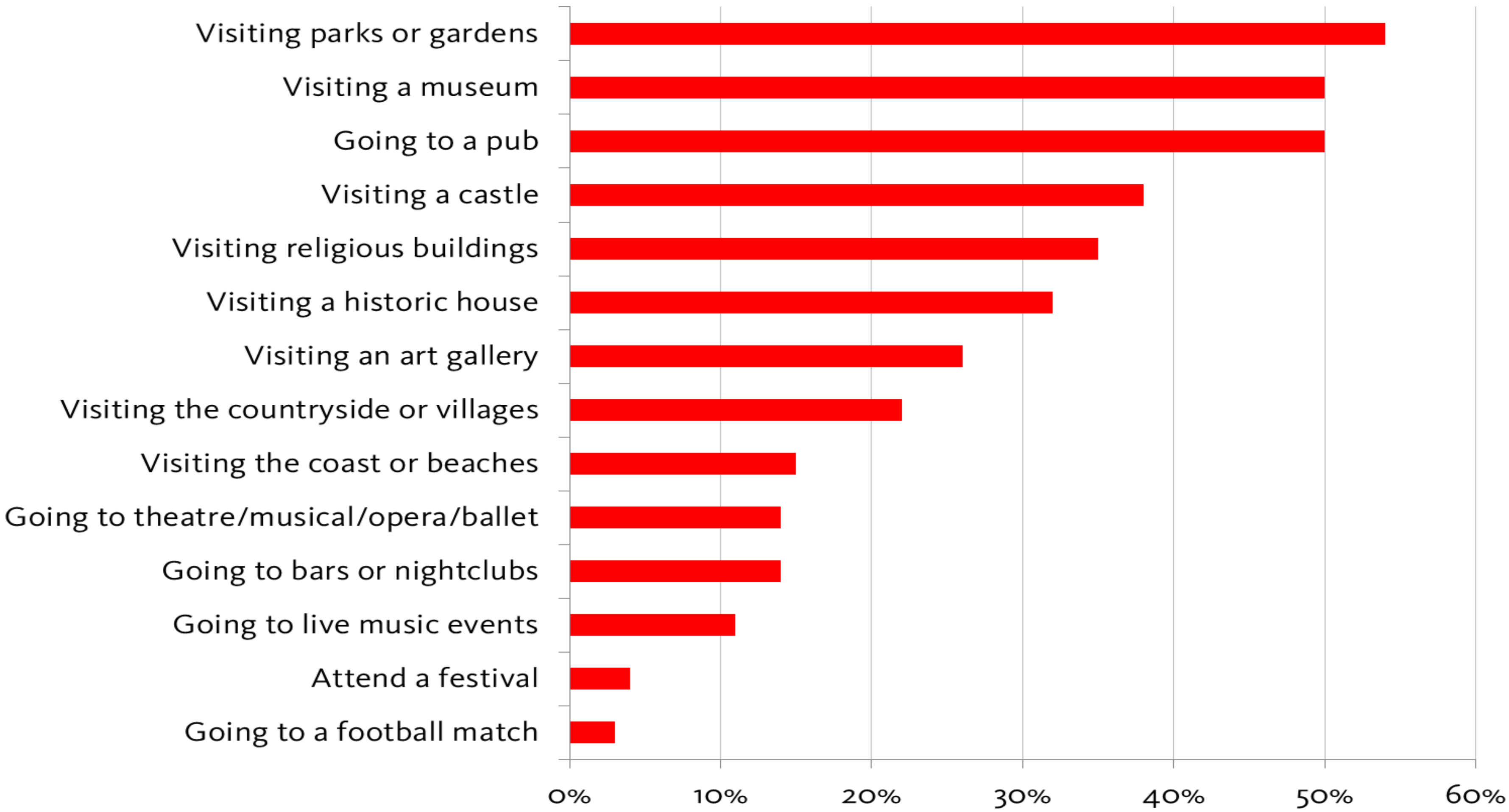
BY HENRIETTA THOMPSON

On a recent visit to the Louvre in Paris, I was faced with an extraordinary scene. Scores of tourists, some standing on plinths, others just randomly scattered, were posing like little teapots with one arm crocked at the elbow. At first I thought it was some sort of flashmob, but it turned out all of them were snapping themselves in front of the great glass pyramid for a fun photo to share on social media.

While smartphones are certainly altering how we experience culture, what this scene prompted me to think about was how culture itself is radically changing, too. Art galleries and museums are no longer stuffy institutions for education and elitist improvement – from the Louvre in Paris to the V&A in London to MoMa in New York, culture is unarguably cool. Major museum shows now rank as highly, and sell as many tickets, as major music gigs. Culture, it has been argued, is the new pop.

In a moment of prophetic clarity, it was Andy Warhol who once noted that, in the future, "All department stores will become museums, and all museums will become department stores." Well he was right, and then some. It's not just that we don't even have to go to museums and galleries any more to see great art, so omnipresent is it in hotels and in retail destinations. Museums have accordingly blurred their traditional remit to become concert venues, shopping

Heritage & Culture are popular (% holiday visits that include activity)



But remember

- In the UK they are free to domestic and international visitors
- They are located in busy urban centres
- They have benefitted from significant public sector investment

Andy Warhol

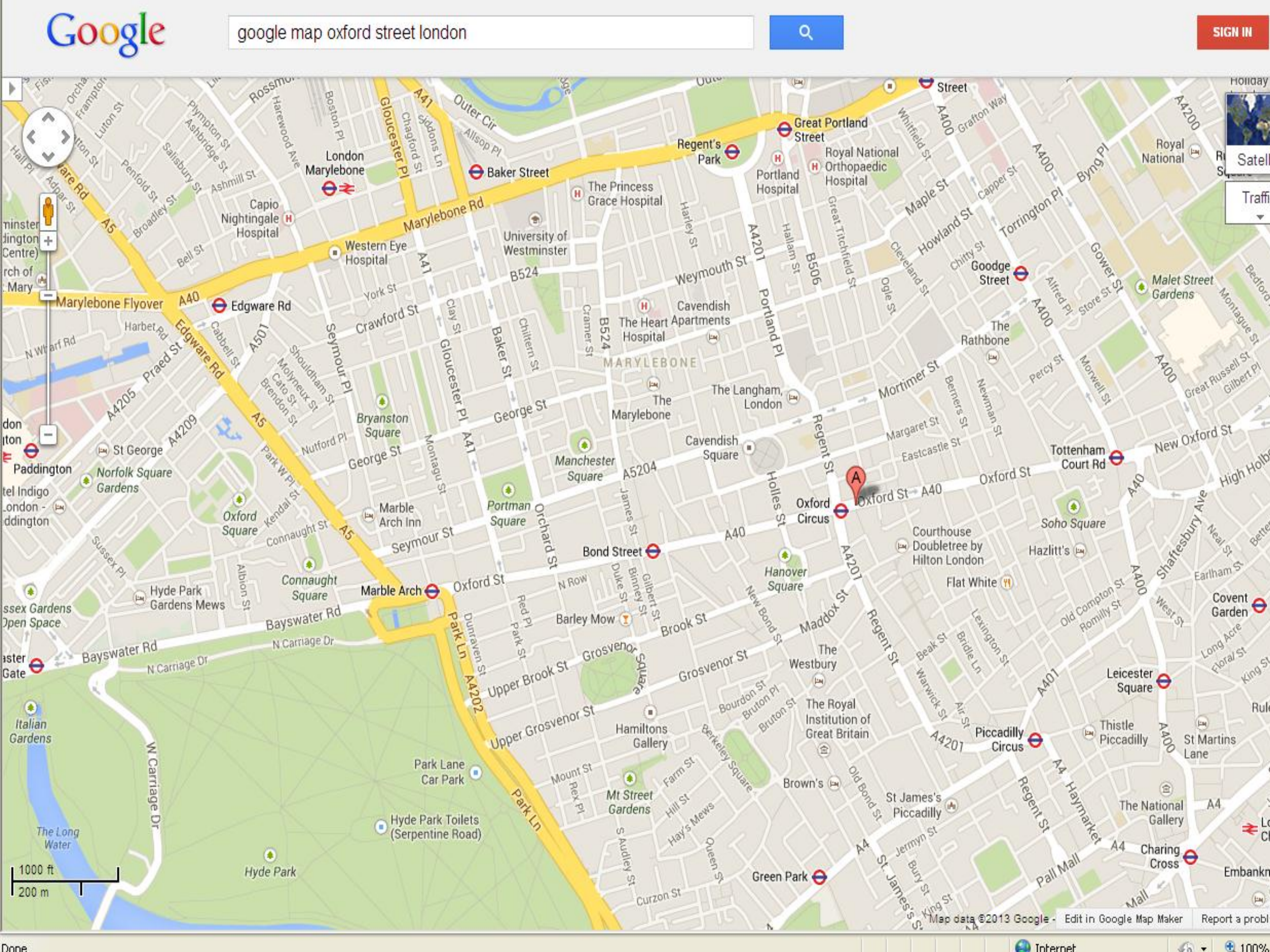
- All department stores will become museums and all museums will become department stores

Unless we compare them…

- Compared to retail
- Some 81% of visitors to the UK intend to shop

Tourism and Retail

- 81% of UK visitors will Shop
- 25% of total visitor expenditure will be on Retail
- £4.5-£5 billion per year
- UK manufactured gifts favoured
- Low level of seasonality
- Significance of branded goods


google map oxford street london
SIGN IN
London Marylebone
Baker Street
Regent's Park
Great Portland Street
Marylebone Rd
Marylebone Flyover
Edgware Rd
Paddington
Goodge Street
Tottenham Court Rd
Oxford Circus
Oxford St
New Oxford St
Bond Street
Marble Arch
MARYLEBONE
Cavendish Square
Portman Square
Manchester Square
Bryanston Square
Hanover Square
Soho Square
Leicester Square
Piccadilly Circus
Charing Cross
Green Park
Covent Garden
Hyde Park
The Long Water
Italian Gardens
Park Ln
Regent St
Portland Pl
Bayswater Rd
Upper Grosvenor St
Grosvenor Square
The National Gallery
Pall Mall
Haymarket
The Langham, London
Portland Hospital
The Princess Grace Hospital
University of Westminster
Royal National Orthopaedic Hospital
1000 ft
200 m
Map data ©2013 Google
Edit in Google Map Maker
Done
Internet

Scale of Visitation: Footfall

Location	Footfall per Year
Oxford St	180 m
Regent St	78 m
Bond St	15.6 m

Who offers the best attraction modle?

- In terms of earning and ROI
- Theme Parks and Merlin Entertainment who operate : Blackpool Pleasure Beach, Alton Towers, Legoland, Flamingo Land
- But not immune to shocks as the tradgey at Alton Towers with Smiler Rollercoaster illustrates
- Circa 200 job cuts, restructuring,
- 12% loss in share value since crash

Merlin Entertainment

- Operates over 100 attractions
- 12 Hotels and 4 Holiday Villages
- In 23 Countries
- 60+ million visitors
- 26,000 employees

Merlin Entertainment

- Oct 2015 Partnership with China Media Capital to develop visitor attractions across China (Legoland, Dungeons, Dreamworks Tours etc.)
- Building on existing presence Madame Tussauds (4 locations) and Oceanworld (1 location)

Merlin Entertainments

- Branded development and extension
- Yield Management and Discount
- Rapid reinvestment cycles
- Investment in technology ; yield, marketing, social and digital media
- European and SE Asian expansion


LEGO
LEGOLAND
WINDSOR

Built Heritage

- Iconic sites: Stonehenge, Tower of London, St Pauls, Westminster Abbey, Roman Bath, Edinburgh Castle
- Paid entrance with public sector funded reinvestment / maintenance
- Urban location with significant visitor traffic
- Less sophisticated use of price, yield, dynamic exhibitions

Key Factors

- Most tourists will visit destinations within their own region at least 1-2 times per year
- In an uncertain world people stay close to home
- Recession and learned behaviour
- Safety and Security / Avoidance of disruption
- Remember: Day visitors 30% plus of London attraction visitors

Rural Attractions

- Those achieving 1 million plus are rare
- Most are unpaid natural heritage
- Visitation and accurate visitor numbers an issue
- Yield, marketing, interpretation rarely cutting edge making the presentation on the Cliffs of Moher since they upset this perspective