
Visitor Attractions in the UK

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Summary

- 1.01 Over the past 20 years there has been an unprecedented growth in the number of traditional, stand-alone, visitor attractions, such as museums and heritage properties, visitor centres, farm parks, aquaria and theme parks. In many countries supply has more than doubled in this period. In recent years the attractions industry has faced intense competition from a wide range of rapidly emerging innovative leisure products. Evidence suggests that in many mature tourism destinations demand for traditional attractions is actually now in decline. There are real fears for the viability and survival of many of these attractions. At the same time, however, some major new players in the industry are responding strongly with the development of an exciting new genre of attractions. Some of these are being built in unusual venues, thus creating very different tourism destinations for the millennium. Over the next ten years there will emerge a new geography and typology of visitor attractions. These developments will require different forms of management and organisational structures if they are to work. The concept of multi-faceted and multi-occupier sites is likely to provide the key to achieving success in this industry.
- 1.02 In the 1970s and 1980s visitor attractions became widely regarded as an essential feature for any successful tourist destination development. Clare Gunn refers to attractions in his book, *'Vacationscape'* as "... *the first power, lodestones for pleasure and the real energiser of tourism in a region ... without attractions there would be no need for other tourism services*".
- 1.03 Throughout the 1990s, however, the role and status of the traditional attraction has become less relevant to consumer needs. With the survival of many attractions becoming more precarious. The market is responding with a new generation of visitor attractions with many specifically designed to be *'destinations'* in their own right. These *'destination attractions'* offer consumers a comprehensive range of services and facilities for entertainment, shopping, eating and drinking, and other aspects of leisure.

Definition

- 1.04 The definition of a tourist attraction for the purpose of the survey 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 public access for entertainment, interest, or education; 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, and must be receiving revenue directly from the visitors.

Introduction

- 1.05 In early 2000 the English Tourism Council convened an 'Attractions Round Table' of experts to consider the future of the attractions industry in England. This was preceded by a review by the Wales Tourist Board on key issues facing the industry and followed by a debate in Scotland orchestrated by the Association of Scottish Visitor Attractions. The unifying theme to these three assessments was the growing concern that the attractions industry in the UK is facing challenging times.
- 1.06 The context for these discussions was set in three major reports in which there were a number of common themes. The three reports published in 1999/2000 were:
- Attracting Attention by the Confederation of British Industry
 - New Visions for Museums by the Association of Independent Museums
 - Creative Industry by the Museums and Galleries Commission
- 1.07 The common themes in terms of market trends reflected the significant increase in the supply of attractions over the past 20 years. Almost half (47%) of all visitor attractions in the UK have opened since 1980. The BTA estimate that 18% opened in the 1970s, 8% in the 1960s and 6% in the 1950s. The peak years for opening new attractions were 1989 (197), 1990 (174) and 1986 (143).
- 1.08 These new attractions have been primarily farm attractions (84% of the 247 in this category opened since 1980) and visitor centres (80% of the 489 have opened since 1980). In contrast the majority of historic properties (74%) and museums (56%) have been open to the public for longer than 20 years.
- 1.09 Importantly, and this fact reflects the tenor of the three reports, the 47% of attractions opened since 1980 account for only 29% of the total visitation in 1999 of 404 million.
- 1.10 Changing consumer needs and increasing competition from other parts of the leisure industry linked to significant structural changes in the population are the major causes of concern for the attractions industry. There has been only modest growth in the total demand for attractions in recent years (1.2% 1999 over 1998) despite the major increase in supply.

Table 1: Number of visits by category of attraction

Category	Number ('000)	%	Average number of visits per site
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Museums & galleries	77,116	19	43,900
Historic properties ¹	67,339	17	44,300
Visitor centres	19,822	5	40,500
Gardens ²	16,010	4	42,400
Workplaces	10,049	3	26,300
Wildlife sites	24,696	6	78,400
Country parks	70,755	18	244,000
Farm attractions	9,792	2	39,600
Steam railways	5,275	1	49,800
Leisure parks	41,466	10	487,800
Other	62,047	15	96,000
Total	404,368	100	65,100

¹ This excludes estimates for parish churches (12 million visits)

² In addition there are 1 million visits to over 3,000 gardens in the National Gardens Scheme

Source: BTA

- 1.11 These factors, together with (i) a lack of investment in many existing attractions, (ii) the artificial political interventions affecting the competitiveness of the market place (such as the introduction of free admission to national museums and galleries in 2001) and (iii) the small scale, fragmented, nature of much of the industry has resulted in many attractions struggling to survive. It is estimated that 57% of all attractions receive less than 6% of all visitors whilst just 7% of attractions cope with 58% of total visits. Closures are becoming increasingly common place, especially in the private sector.
- 1.12 The English Tourism Council's response to these challenges is represented in the 'Action for Attractions' report (2000). This highlighted the need for:
- improving market understanding
 - increasing visitor satisfaction
 - improving the management of attractions
 - developing benchmarking
 - raising quality
 - improved funding and investment
 - more effective and efficient planning
- 1.13 The ETC have also introduced an Attractions Working Group and are introducing a Visitor Attraction Quality Management Scheme. These types of initiatives and actions are replicated in Wales, Scotland and Northern Ireland. For example, in 2000 the Wales Tourist Board produced an interactive CD ROM training programme in association with the Welsh Association of Visitor Attractions entitled '*Training to Attract*'.
- 1.14 The attractions are a vibrant component in the UK tourism industry. They employ over 100,000 people (56,000 full time equivalents) and are visited by 6.5 million

overseas tourists. In 1999 it is estimated that 32% of the attractions invested over £470 million on capital improvements.

- 1.15 The importance of visitor attractions to the tourist industry has been reaffirmed in the period post September 11th and the aftermath of the foot and mouth crisis in the UK and other parts of northern Europe. The reason people travel, be it for a day trip or as tourists on holiday, is to visit attractions. Attractions provide the primary motivation for most leisure tourism. Visitor attractions can be categorised in three ways:
- (i) natural features
 - (ii) festivals and events
 - (iii) man-made attractions that are
 - (a) purpose built to attract visitors
 - (b) established for other reasons but which attract visitors
- 1.16 This review focuses upon man-made attractions (iii (a) and (b)) as recognised by most tourism-related organisations in Europe. The British Tourist Authority's definition of a visitor attraction echoes that used by the World Tourism Organisation, the World Travel and Tourism Council and others. It recognises the relevance of the term '*visitor attraction*' rather than '*tourist attraction*' highlighting the fact that attractions receive both tourists and residents on day trips.

Sources of Information

- 1.17 The United Kingdom's four '*home*' tourist boards have the most comprehensive, detailed, information of visitor attractions in Europe. Since 1978 the English Tourism Council, the Northern Ireland Tourist Board, the Scottish Tourist Board (now VisitScotland) and the Wales Tourist Board have collaborated to collect data in this sector using common definitions. The principle reporting mechanisms are:
- Sightseeing in the UK (annual since 1978)
 - Visits to Tourist Attractions (annual since 1987)
 - Visitor Attractions Directory (since 1984)
- 1.18 In addition there are a number of consumer-based surveys that provide regular analysis of day trip taking behaviour of the UK public. These include:
- The UK Day Visits Survey 1996 (every two years)
 - Day Visits in Great Britain 1991 and 1992
 - Survey of Overseas Visitors by the BTA (annual)

- 1.19 In addition both consumer (demand) and supply information is available from a number of studies regularly undertaken by commercial research organisations, in particular:
- Days Out by Leisure Intelligence, Mintel
 - Survey of Visitor Attractions by Deloitte and Touche
- 1.20 The various sectors within the UK Visitor Attraction industry are also subject to regular review and analysis, notably:
- The Heritage Monitor by the ETC (annual since 1977)
 - Survey of Visitors to Churches by the ETC (annual since 1986)
 - Visitor Figures and Annual Survey by the Historic Houses Association (since 1998)
- 1.21 This information is collected using a standard definition of a visitor attraction and is collated using standardised reporting systems. As a result the data is robust and, in relative terms, reliable. Much of the data has been collected over at least the past 20 years and, therefore, provides useful time series trend information.
- 1.22 The BTA, together with the four tourist boards, identified a total of 6,215 visitor attractions in the UK in 1999/2000. The majority of these are in England where the stock of 4,581 attractions represents 74% of the UK total. Scotland has 1,064 (17%), Wales 354 (6%) and Northern Ireland 216 (3%).
- 1.23 Recent research by Stevens & Associates for the Wales Tourist Board suggests that the total for Wales is actually over 600 attractions. Thus, the published data by the BTA and the attractions monitored in the annual '*Sightseeing in the UK*' research may well represent only 50% of the actual number of attractions. This hypothesis has not been tested and, as a result this review will use the officially published data that relates to the 6,215 attractions monitored by the BTA et al.
- 1.24 Although London has just 4% of all attractions in the UK, they account for 13% (52.9 million) visits. London has seven times as many attractions per square kilometre as the UK average. Scotland, on the other hand, has the lowest density of attractions. Ironically, however, seven of the ten district councils with the greatest number of attractions are in Scotland (see Table 2).

Table 2: Density of tourist attractions by region/country in 1999

Region/country	Attractions		Per 1,000 square kilometres
	Number	%	
Cumbria	142	2	20.8
Northumbria	250	4	29.1
North West	319	5	43.4
Yorkshire	415	7	26.9
Heart of England	860	14	33.9
East of England	758	12	30.3
London	276	4	174.9

West Country	651	10	33.1
Southern	407	7	35.6
South East	503	8	54.7
England	4,581	74	35.1
Northern Ireland	216	3	16.0
Scotland	1,064	17	13.8
Wales	354	6	17.0
UK	6,215	100	25.7

Source: BTA

Table 3: Top ten councils by total number of attractions in 1999/2000

1.	Highlands and Islands	Scotland	160
2.	Dumfries and Galloway	Scotland	81
3.	Argyll and Bute	Scotland	78
4.	Aberdeenshire	Scotland	77
5.	Scottish Borders	Scotland	67
6.	Edinburgh	Scotland	65
7.	Perth and Kinross	Scotland	60
8.	Isle of Wight	England	57
9.	South Lakeland	England	55
10.	Gwynedd	Wales	54

Source: BTA

- 1.25 These council areas, with the exception of Edinburgh, have a relatively small resident population base but have high concentrations of staying tourists and day visitors. These factors result in a high degree of seasonality and low levels of attendance making many of these attractions marginal in terms of their operational viability.
- 1.26 The majority of the 6,215 attractions in the UK are small scale operations with 57% receiving 20,000 visits or less. Indeed the BTA estimate that only 7% (435) of all attractions receive more than 200,000 visits per annum.

Table 4: Top 20 charging attractions in the UK in 1999

Type	Rank	Name	1991	1998	1999	2000
Theme park	1	Alton Towers, Staffordshire	2,650,000	2,782,000	2,450,000	2,650,000
Museum	2	Madame Tussaud's, London	2,640,000	2,772,500	2,388,000	2,640,000
Heritage	3	Tower of London	2,422,181	2,551,459	2,303,000	2,428,603
Museum	4	Natural History Museum, London	1,739,591	1,904,539	1,577,044	1,696,725
Theme park	5	Legoland, Windsor	1,620,000	1,510,363	1,490,000	1,620,000
Theme park	6	Chessington World of Adventures	1,550,000	1,650,000	1,500,000	1,500,000
Museum	7	Science Museum, London	1,480,000	1,599,817	1,337,432	1,483,234
Gallery	8	Royal Academy, London	1,390,000	912,714	N/C*	N/C*

Heritage	9	Canterbury Cathedral	1,350,000	1,500,000	1,263,140	1,318,065
Heritage	10	Windsor Castle	1,280,000	1,495,465	1,127,000	1,280,000
Heritage	11	Westminster Abbey	1,268,215	N/C*	N/C*	N/C*
Heritage	12	Edinburgh Castle	1,219,720	1,219,055	1,204,285	1,219,720
Theme park	13	Flamingo Land Theme Park, North Yorkshire	1,197,000	1,105,000	1,301,000	1,197,000
Theme park	14	Drayton Manor Park, Staffordshire	1,172,448	1,003,802	N/A	N/A
Transport	15	Windermere Lake Cruises, Cumbria	1,140,207	1,060,600	1,172,219	1,140,207
Heritage	16	St Paul's Cathedral, London	1,076,222	1,095,299	937,025	1,068,336
Zoo	17	London Zoo	1,067,917	1,052,000	930,000	1,000,057
Zoo	18	Chester Zoo	965,721	920,000	1,118,000	1,065,000
Museum	19	Victoria and Albert Museum, London	945,677	1,110,000	N/C*	N/C*
Theme park	20 =	Thorpe Park, Surrey	926,000	852,000	925,000	926,000
Heritage	20 =	Roman Baths, Bath	-	-	932,566	918,867

* Note: N/C Not comparable

These figures exclude the BA London Eye and the Millennium Dome

- 1.27 The UK's top 20 charging attractions accounted for 29,100,899 visits in 1999 or 27,832,684 (excluding Westminster Abbey, whose 1998 figure is not comparable to that for 1999). Removing Westminster Abbey from the figures shows that the top 19 attractions showed a 0.9% (263,929) downturn in visits in 1999 compared to 1998.

Table 5: Typology of the top 20 charging attractions in 1999/2000

Type	No	Total Visits	%
Theme Parks	6	9,115,448	31
Heritage Properties	6	8,616,338	29.5
Museums & Galleries	5	8,195,268	28
Zoos	2	2,033,638	7
Other	1	1,140,207	4.5
Totals	20	29,100,899	100

- 1.28 Table 5 shows that the traditional cultural attractions, as represented by Heritage properties, together with museums and galleries, constitute 11 of the 20 top charging attractions (55%) and attract 57.5% of all visits in this group. The six theme parks have a total visitation of just over 9 million (average 1.5 million). Only Legoland (near Windsor) in this top 20 of charging attractions has entered the market in the past six years (opening in 1996); the others are mature attractions that have had a market presence for at least 20 years.
- 1.29 An important feature of the attractions market in the UK over the past few years has been the difficulties experienced by new attractions to capture market share. There have been several high profile attractions which have failed to achieve their projected attendance figures and, as a result, have required public support to ensure their survival. These have included the Royal Armouries Museum in

Leeds, the National Centre for Popular Music in Sheffield, and the National Glass Centre in Sunderland. In addition a number of commercial operations have also struggled to secure viable numbers and have traded below their targets. The reasons for these miscalculations in projecting market impact was (i) the over optimistic view of the public interest in visitor attractions in the late 1990's; (ii) the failure to acknowledge changing consumer behaviour; and (iii) the need to present high levels of visitation to secure public funding or private borrowing. The top ten new attractions opening between 1995 and 1999 show a few that have made a major impact on visitor numbers.

Table 6: Top ten charging attractions opened between 1995 and 1999

	1999 visits	Year of opening
Legoland, Windsor	1,620,000	1996
London Aquarium	715,054	1997
Former Royal Yacht Britannia, Leith, Edinburgh	415,297	1998
National Marine Aquarium, Plymouth	351,000	1998
Burns National Heritage Park, Alloway	343,660	1995
Royal Armouries Museum, Leeds	300,000	1996
Dynamic Earth, Edinburgh	295,959	1999
Oceanarium, Bournemouth	279,460	1998
The Aquarium of the Lakes, Newby Bridge	250,000	1997
Clambers Play Centre, Hastings	175,000	1995

- 1.30 Table 7 illustrates the sectoral distribution of UK attractions. Cultural attractions, as represented by Museums and Galleries (1,756), historic properties (1,521) and gardens (378), constitute 58% of the supply side. The relatively recent phenomenon of visitor centres, very much a post-1970's development, now constitutes 8% (489) of provision.

Table 7: Attractions in the UK in 1999/2000 by sector

Museums and galleries	1,756	28%
Historic properties	1,521	24%
Visitor centres	489	8%
Gardens	378	6%
Workplaces	382	6%
Other	646	10%
Wildlife sites	315	5%
Country parks	290	5%
Farms	247	4%
Steam railways	106	2%
Leisure parks	85	1%
Total	6,215	100%

Source: BTA

- 1.31 Figures for the top five most visited attractions by type in the UK in 199 illustrate the importance of 'Museums and Galleries' and of 'leisure and theme parks' in capturing market share. The 35 attractions represented in the eight different

types of attractions had almost 60 million visitors in 1999 (average 1.5 million) between them, the museums and theme parks accounted for 59% of this total. Significantly, only seven of the 35 attractions are outside England and four of these (Edinburgh 200, Edinburgh Castle, Royal Botanic Garden and Dynamic Earth) are in Scotland's capital city. The total number of visitors to these five attractions in Edinburgh in 1999 was in excess of 2.6 million or 5% of the total visitation to this sample of 35 in the UK.

Table 8: Top five attractions by type in 1999 - 2000

		1999	2000
(1)	Historic Monuments & Houses		
	1 Tower of London	2,422,181	2,303,167
	2 Windsor Castle	1,280,000	1,127,000
	3 Edinburgh Castle	1,219,720	1,204,285
	4 Roman Baths, Bath	918,867	932,566
	5 Stonehenge	838,880	799,742
		6,679,448	6,366,760
(2)	Cathedrals & Churches		
	1 York Minster	1,800,000	1,750,000
	2 Canterbury Cathedral	1,350,000	1,263,140
	3 Westminster Abbey	1,268,215	1,230,000
	4 St Paul's Cathedral, London	1,076,222	937,025
	5 Chester Cathedral	1,000,000	1,000,000
		6,494,437	6,180,165
(3)	Gardens		
	1 Hampton Court Gardens, London	1,200,000	N/A
	2 Kew Gardens	864,269	860,340
	3 Botanic Gardens, Belfast	630,000	650,000
	4 Wisley Gardens, Surrey	614,487	613,987
	5 Royal Botanic Garden, Edinburgh	609,488	609,838
		3,918,244	2,734,165
(4)	Museums & Galleries		
	1 British Museum, London	5,460,537	5,466,246
	2 National Gallery, London	4,964,879	4,897,690
	3 Tate Gallery, London	1,822,428	3,873,887
	4 Natural History Museum, London	1,739,591	1,577,044
	5 Science Museum, London	1,480,000	1,337,432
		15,467,435	17,152,299
(5)	Wildlife Attractions		
	1 London Zoo	1,067,917	930,000
	2 Chester Zoo	965,721	1,118,000
	3 London Aquarium	715,054	780,000
	4 Edinburgh Zoo	526,000	522,279
	5 West Midlands Safari Park, Bewdley	490,000	N/A
		3,764,692	3,350,279
(6)	Farms		
	1 Callestock Cider Farm, Truro, Cornwall	320,000	285,000
	2 Cannon Hall Farm, Cawthorne, Bamsley	290,000	350,000
	3 Brocksbushes Farm, Stocksfield, Northumberland	250,000	N/A
	4 Godstone Farm, Surrey	232,000	221,900
	5 White Post Modern Farm Centre, Farnsfield, Notts	226,000	N/A

		1,318,000	856,900
(7)	Leisure Parks & Piers		
	1 Blackpool Pleasure Beach	7,200,000	6,800,000
	2 Palace Pier, Brighton	3,750,000	N/A
	3 Segaworld, The Trocadero, London	3,454,690	N/A
	4 Eastbourne Pier	2,800,000	N/A
	5 Alton Towers, Staffordshire	2,650,000	2,450,000
		19,854,690	9,250,000
(8)	Visitor Centres		
	1 Cadbury World, Birmingham	496,446	480,467
	2 Lulworth Cove Heritage Centre, Dorset	452,766	406,911
	3 Giant's Causeway Visitor Centre, Bushmills	433,745	395,247
	4 Burns National Heritage Park, Galloway	343,660	285,000
	5 Dynamic Earth, Edinburgh	295,959	398,790
		2,022,876	1,966,415

Table 9: Total visitor numbers by type for top five attractions in a selection of categories in the UK 1999 - 2000

		1999			2000		
		Total	%	Average	Total	%	Average
(a)	Historic Monuments and Houses	6.7 m	11.0	1.3 m	6.0 m	11.5	1.2 m
(b)	Cathedrals and Churches	6.5 m	11.0	1.3 m	6.2 m	11.9	1.2 m
(c)	Gardens	3.9 m	6.5	0.8 m	3.1 m	6.0	0.6 m
(d)	Museums and Galleries	15.5 m	26.0	3.0 m	17.2 m	33.0	3.5 m
(e)	Farms	1.3 m	2.5	0.26 m	1.3 m	2.5	0.3 m
(f)	Leisure and Theme Parks	19.9 m	33	3.97 m	15.8 m	30.3	3.2 m
(g)	Visitor Centres	2.0 m	3.5	0.4 m	2.4 m	4.8	0.5 m
	Total	59.6 m	100	1.49 m	52.0 m	100	1.48 m

New Millennium

- 1.32 The Millennium was a year of significant expansion in the attractions sector in the UK with 79 new facilities opening, many of which were large-scale schemes that had been supported by Millennium Commission funding from the National Lottery. New attractions supported in this way included the Eden Project (Cornwall), the National Botanic Garden of Wales (Carmarthenshire), the Earth Centre (Doncaster) and the Big Idea (Scotland). The Millennium Dome received 6.5 million visits in 2000 making it the UK's most popular charging attraction, however many observers note that the Dome does not meet the definition of a visitor attraction as agreed by the British Tourist Authority and the UK's tourist boards. The British Airways London Eye, initially designed as a temporary attraction, has had its period of operation extended and is now seeking semi-permanent planning status. In 2000 the London Eye had 3.3 million visitors. As a result the previous leading attraction, Alton Towers, moved into third position of the UK's most popular attractions in 2000 with 2.45 million visits.
- 1.33 The emergence of a new generation of large scale attractions had three important effects on the UK market:

- (1) It stimulated investment in other, existing, attractions leading to the upgrading of these products; this was particularly the case in museums and galleries where Heritage Lottery funds were used for this purpose. In total an estimated £377 million was spent upgrading 800 attractions in the UK in 2000;
- (2) It generated new market interest in visiting attractions but, at the same time, introduced increased competition for the existing market. The net result was displacement with no overall uplift in the total market for attractions;
- (3) The overall expectation of the quality of the attraction product was increased as visitors were exposed to modern, innovative, displays and a fresh focus on customer care.

1.34 The Millennium Dome attracted 6.5 million visits in 2000. As a temporary attraction this facility does not strictly conform to the definition of a visitor attraction used in this review. Its presence in the market place did, however, have an impact on the attraction industry. For example, the 3,400 attractions in the UK monitored in both 1999 and 2000 for their annual visitor attendance showed a 2% decrease in numbers in 2000. Notably involving a 3% decrease in visits to attractions in the South East of England and a 4% decrease amongst other attractions in London. The attractions in these two regions clearly losing market share to the Dome.

1.35 A further 78 new attractions opened in 2000. However, data is only available for 27 of these who reported 9.2 million visits in their first year of trading. This represents 3.9% of the total stock of attractions capturing 2.2% of the market. Overall these new attractions resulted in the total market growing by 4% (the majority accountable by the Dome) with existing attractions suffering a decline in visits. Fear of displacement of demand from existing to new attractions is borne out.

Table 10: A Sample of New Attractions Opening in 2000

England	British Airways London Eye
	Eden Project, Cornwall
	Fort Paull, Hull
	Gaunless Valley Visitor Centre, Durham
	Gilbert Collection, London
	Greenway, Devon
	Somerset House, London
	Hough Mill, Leicester
	Houses Parliament Tour, London
	Interactive World, Newcastle
	The Lowry, Manchester
	New Art Gallery, Walsall
	Restoration House, Rochester
	Rheged, Cumbria
	Steam Museum, Swindon
	Tate Modern, London
	Ventnor Botanic Garden, Isle of Wight
	Wetland Centre, London

	Whisby Nature World, Lincoln
	World of Glass, Merseyside
Scotland	Bright Water Visitor Centre, Skye
	Gerannen Visitor Centre, Lewis
	Shaping a Nation, Edinburgh
	The Brewery, Kirkcudbrightshire
	The Big Idea, Irvine
Wales	Aberglasney Historic Gardens, Carmarthen
	National Botanic Garden, Carmarthen
Northern Ireland	None recorded

1.36 The sectors showing the greatest impact in terms of their decline in numbers over the 1999 figures are farm attractions (-8%), churches and cathedrals (-4%), historic houses and castles (-4%) and workplace attractions (-4%). Only steam railways (+3%) recorded growth in demand. In *'Sightseeing in the UK 2000'* published by the English Tourism Council's Research Department (December 2001) the authors conclude that: *"In a competitive market smaller attractions have suffered greater losses in 2000 than larger attractions"*. In cases where many attractions have marginal viability even small percentage declines in numbers will have a significant impact upon their business. These figures are also pre the impact of foot and mouth in 2001.

1.37 Capital funding from the National Lottery was a major stimulant for new attraction development across the UK. A total of £1.3 billion was spent on 190 projects across 3,743 sites, including 12 cross country, cross region or UK wide projects (involving 1,285 sites and £109 million). In nine areas of the UK the project receiving the biggest capital award was a visitor attraction (see Table 11). The scale of this investment into new flagship attractions, estimated at over £335 million represented an artificial environment creating large scale projects in a market place that was already over supplied at a time when existing private sector operators are finding it over more difficult to secure capital funds to upgrade their product.

Table 11: Funding of Major New Attractions by the Millennium Commission by Region/Country

Region	Total Awards £m	No. Projects	Biggest Award £m	Attraction
Scotland	193	19	35	Glasgow Science Centre
N Ireland	78	17	45	Odyssey
N East	65	9	31	Centre for Life
N West	93	19	16	The Lowry
Yorks & Humberside	157	17	40	Earth Centre
E Midlands	47	11	26	Science Centre
S West	109	8	44	@Bristol
S East	95	25	38	Portsmouth Harbour
Gtr London	148	15	50	Tate Modern

Source: ETC 2001

- 1.38 The Millennium Commission also invested over £171 million in a further 14 major attractions all of which opened in 2000. At the same time the Heritage Lottery Fund has also been investing in major attractions in the UK. A selection of these schemes is show in Table 12.

Table 12: Heritage Lottery Funded Attraction-Based Projects

Project	Location	Award £m
Gilbert Collection, Somerset House	London	31
Science Museum Wellcome Wing	London	23
Tate Gallery	London	19
British Museum	London	15
Manchester Art Gallery	Manchester	15
Victoria & Albert Museum	London	15
Imperial War Museum	London	15
National Maritime Museum	London	12
National Portrait Gallery	London	12
Manchester Museum	Manchester	12

- 1.39 Clearly the figures in Table 12 reveal the dominance of London-based projects in securing major Heritage Lottery Awards. Of the £616 million Lottery funding secured by the museums and galleries sector (by December 2000) £140 million (23%) was awarded to the eight projects listed.
- 1.40 For other attractions relatively few had obtained support via the Lottery distribution bodies. For example, the English Tourism Council has identified 48 attractions receiving capital funds from the Millennium Commission and 98 from the Heritage Lottery Fund. A further 55 had successfully applied for funding from the European Regional Development Fund and the European Social Fund.
- 1.41 A number of the major Millennium projects soon experienced the harsh realities of running visitor attractions in a highly competitive market place. Those projects facing problems include the National Centre for Popular Music in Sheffield which closed within a year of opening whilst the Earth Centre in Doncaster admitted to having problems achieving its projected visitor numbers. This has become a common feature of these larger projects. According to recent reports in the Museums Journal, some ten projects worth £22 million failed in 1999 and research by the Heritage Lottery Fund has shown that 60 heritage attraction lottery applications were predicated on over optimistic visitor numbers. On average forecast numbers were 50% higher than those achieved.
- 1.42 The report '*Sightseeing in the UK in 2000*' examines revenue trends within the sector. For Great Britain (no data was available for Northern Ireland) the average revenue increase reported in 2000 was 2%. This was less than inflation (3%) and, therefore, represents a decrease in real revenue. Only theme parks, wildlife attractions and steam railways reported an increase in revenues over their 1999 performance above the rate of inflation.

- 1.43 Over 1,200 attractions in England and Scotland responded to the 'Sightseeing' survey to provide a detailed analysis of their average income from different sources of revenue. The income from admissions/donations is the largest generator of revenue with a significant, and increasingly important, contribution from secondary spending on-site (retail and catering).

Table 13: Average Revenue per visit by Source and by Country 2000

Country	Admission/Donation £ (%)	Catering £ (%)	Retail £ (%)	Other £ (%)	Total £
England	3.32 (54)	0.95 (15)	1.64 (27)	0.26 (4)	6.15
Scotland	1.78 (26)	1.14 (17)	3.26 (48)	0.57 (9)	6.74
Total	3.04 (49)	0.99 (16)	1.94 (31)	0.3 (5)	6.25

- 1.44 Table 13 reveals that attractions in Scotland have more successfully diversified their businesses than their English counterparts, achieving a much higher yield from secondary spending - £4.40 in Scotland compared to £2.59 in England. Retailing is a particularly strong feature of attraction activity in Scotland. This research also identifies the wide range of revenue generation between different types of attractions. The highest levels of commercial activity are found in workplace attractions and theme parks whilst the lowest levels of income per visit are generated in country parks and religious properties (see Table 14), both of which rarely have an admission charge.

Table 14: Average Total Revenue by Attraction Category 2000

Category	Total All Sources £
Cathedrals and churches	3.19
Country parks	2.21
Farms	4.74
Gardens	7.36
Historic houses/castles	7.13
Other historic properties	4.70
Leisure & theme parks	9.24
Museums and art galleries	3.97
Steam railways	7.76
Visitor centres	6.91
Wildlife attractions and zoos	8.29
Workplaces	15.65
Others	9.40
Total	6.25

Ownership in 2000

- 1.45 The pattern of attraction ownership varies considerably across the UK. Overall the private sector operates the majority of attractions (58%) however in Wales the total is 61%, compared to 38% in England. This reflects a number of policy and market differences. For example, in Wales the body responsible for

safeguarding the built heritage (Cadw: Welsh Historic Monuments) has a higher proportion of monuments in its care open to the public than in Scotland or England. Similarly local authorities have had to be more proactive in providing attractions in order to stimulate tourism growth in difficult environments and to assist economic regeneration.

Table 15: Visitor Attraction Ownership and Visits in the UK in 2000 (%)

Country	Government	English Heritage Historic Scotland Cadw	Local Authority	National Trust National Trust Scotland	Private
England					
Attractions	3	5	21	9	62
Visits	16	2	21	5	56
Northern Ireland					
Attractions	30	-	32	9	29
Visits	32	-	50	7	12
Scotland					
Attractions	6	10	20	9	55
Visits	14	8	38	5	35
Wales					
Attractions	4	13	36	7	39
Visits	8	10	37	6	38
UK					
Attractions	5	7	22	9	58
Visits	16	3	24	5	52

1.46 Overall the private sector in the UK receives 56% of all visitors whilst the Government attractions (for example the Historic Royal Palaces) account for 5% of the attractions stock but 16% of all visits. This is unsurprising given the fact that the Government's holdings (and indeed those of the heritage agencies) include icon, 'must see' properties. These figures also reflect the fact that the private sector includes many small and medium sized enterprises. Indeed it is estimated that 72% of all attractions receive less than 50,000 visits each year accounting for just 11% of total demand. Conversely, the 9% of attractions recording more than 200,000 admissions in 2000 accounted for 64% of total visits.

1.47 It has long been recognised that this mix of public : private sector provision in the UK creates a distorted market place within which the private sector is disadvantaged through artificial support for public sector projects. This is not a level playing field. In 2001 this bias was further exacerbated by (1) the Government's decision to make access to all national museums and galleries free of charge, and (2) the opening of the raft of Millennium funded schemes (discussed earlier). Aggrieved private sector operators have articulated their concerns; others have simply withdrawn from the market. The removal of

Granada, Pearsons and the Vardon Group from direct involvement in the sector has resulted in a number of management buy-outs, notably involving the Tussaud's Group Ltd and Merlin Entertainment Ltd.

Attractions in London

- 1.48 Over half of the top 14 visitor attractions in London are national institutions whose operations are directly funded by the sponsoring Department of Culture, Media and Sport. As a result of recent Government legislation these attractions also offer free admission. The most popular attractions in London are the British Museum (5.5 million visitors in 2000), the National Gallery (4.9 million visitors) and the Tate Modern (3.9 million visitors). The British Airways London Eye (managed and operated by Tussauds) and Madame Tussauds are the most popular fee charging attractions followed by the Tower of London which is operated under the aegis of the Historic Royal Palaces.

Table 16: Top London Attractions

Attraction	Visitor figures 2000 (1999)	% Change	Admission charges	Information
British Museum	5,466,246 (5,460,537)	0.1	Free	Funding from DCMS
National Gallery	4,897,690 (4,964,879)	- 1.4	Free	Funding from DCMS
Tate Modern	3,873,887 – figures after seven months of opening (N/A)	N/A	Free	Funding from DCMS
BA London Eye	3,300,000 (N/A)	N/A	Adult £9.50, Child £5.00	Managed by Tussaud's Group
Madame Tussaud's	2,388,000 (2,640,000)	- 9.5	Adult £12.00, Child £8.50 (plus Planetarium: Adult £14.45, Child £10.00)	Owned by Tussaud's Group
Tower of London	2,303,167 (2,428,603)	- 5.2	Adult £11.30, Child £7.50	Part of Historic Royal Palaces
Natural History Museum	1,577,044 (1,696,725)	- 7.1	Free	Funding from DCMS
Victoria & Albert Museum	1,344,113 (1,251,396)	7.4	Free	Funding from DCMS
Science Museum	1,337,432 (1,483,234)	- 9.8	Free	Part of National Museum of Science & Industry. Funding from DCMS
Westminster Abbey	1,230,000 (1,260,000)	- 2.4	Adult £6.00, Child £3.00	Receives no funds from the State or from the Church of England. Money to maintain the fabric and deal with day to day running is raised from entry fees, donations and investments
Tate Britain	1,204,147 (1,822,428)	- 33.9	Free	Funding from DCMS
National Portrait Gallery	1,178,400 (999,842)	17.9	Free	Funding from DCMS
St Paul's Cathedral	937,025 (1,968,336)	- 12.3	Adult £6.00, Child £3.00	Receives no direct assistance from Government. Tourism and trading provides the bulk of their annual income, with the balance coming from donations and legacies, charitable trusts and foundations, investments and investment property
London Zoo	930,000 (1,000,057)	- 7.0	Adult £11.00, Child £8.00	Part of Zoological Society of London
Average	2,283,368 (2,248,003)	- 5.27	Adult £10.03, Child £6.43	

Source: Stevens & Associates 2002

- 1.49 Only three of the top 14 attractions in London have experienced an increase in visitation in recent years. The British Museum has shown a slight increase (+0.1%) in numbers over their 1999 figure, whilst the Victoria and Albert Museum (+7.4%) and the National Portrait Gallery (+17.9%) appear to have benefited most from the free admissions policy. On the other hand Tate Britain (-33.9%) and St Paul's Cathedral (-12.3%) have been the major casualties in terms of a decrease in demand. Overall the 14 attractions have shown a cumulative decline of some 50,000 visitors or -5.2% over the 1999 figure.
- 1.50 The average adult full price admission charge is just over £10 with the discounted children's rate at 60% of this full price. The most expensive charge made at a London attraction is £14.45 (full adult) for Madame Tussaud's.
- 1.51 There have been relatively few new and successful visitor attractions opening in London in the past five years. Successive attempts to find a formula to make the Trocadero in Piccadilly have all failed and the property owners are still searching for a leisure based tenant. The former offices of the Greater London Council at County Hall has, however, been the focus of a number of developments, notably the London Aquarium and, infamously, for the interactive soccer attraction, The Premier League Hall of Fame.
- 1.52 United Media's '*Premier League hall of Fame*' failed to attract sufficient visitors to make it viable and closed after just 18 months of trading. This experience reflected two important factors for new attractions entering the London market:
- 1.53 The disappointing experience of several recent attractions in central London reflect those of earlier attempts to enter the market, most prominently '*Royal Britain*', developed in the Barbican in the early 1990's and lasting less than 12 months. These case studies sound warning bells for other prospective attraction developers and investors in London and go a long way to explain the slowness in developing Battersea power Station as an attraction.
- 1.54 The attractions supply in London is dominated by public sector museums, galleries and historic properties. Most of these enjoy iconic status as '*must see attractions*' for overseas and, indeed, domestic UK visitors. As a result, it is extremely difficult for new attractions to secure a place in the market. In order to break this pattern it seems that any new attractions must have either an extremely strong household brand name backing it, or it must have an appeal that is global and has an international, rather than a British, appeal.

Wales

- 1.55 Tourism spending in Wales contributed £2 billion to the Welsh economy in 2000, the equivalent to 7% of GDF, making Wales one of the countries in Europe most dependent on tourism. The UK market represents 92% of all trips and 86% of spending. Overseas tourists account for 8% of arrivals but 14% of tourism receipts.
- 1.56 Visitor attractions are recognised as an essential ingredient for attracting both day and staying visitors to Wales. Although the BTA statistics record attendances at 354 attractions in Wales (6% of the total) the Wales Tourist Board recognise 610

attractions. A small (5%) percentage of this total is currently members of the Welsh Association of Visitor Attractions.

- 1.57 The generic concerns facing the attractions industry in the UK are also reflected in Wales, especially the issues of over supply and the recent growth of new attractions. In 1986 an estimated 20 million visits were made to 305 attractions, 20 years later a similar demand existed for double the number of attractions. In 1986 this resulted in one attraction for every 36,000 tourist trips in Wales and for every 9,100 residents. Today it is one attraction for every 18,000 tourist trips and every 4,700 residents.
- 1.58 The supply side is dominated (53.5%) by heritage attractions. Relatively few are 'footloose' and located to maximise market opportunities.

Table 17: Attractions by Type in Wales 2000

Type	Number	%
Historic	112	18.4
Garden	34	5.6
Craft	66	10.8
Museum	109	17.9
Transport	29	4.7
Nature	30	4.9
Zoo/wildlife	28	4.6
Heritage Centre	39	6.4
Work places	34	5.6
Farms	40	6.6
Leisure theme parks	34	5.6
Country parks	42	6.9
Leisure centres	13	2.1
	610	100

- 1.59 The geographic distribution closely reflects the importance of the traditional holiday destination and hence the tourist market for attractions, hence the density of attractions in South West and North West Wales.

Table 18: Geographic Distribution in Wales 2000

Sub-Region	Number	%
North West	110	18
North East	110	18
North	220	36
Mid West	96	16
Mid East	45	7
Mid	141	23
South West	132	22
South East	117	19
South	249	41

- 1.60 The Wales Tourist Board has adopted a three tier system of recognising the significance of visitor attractions. This places less emphasis on their absolute visitor numbers and more on their contribution to influence visitor travel patterns. Thus, the WTB recognises 22 primary attractions of national significance (4% of the total). These attract 23% of all visitation. Attractions of regional significance account for 12.5% of the supply side and 33% of demand. Local attractions constitute 75% of supply and just 23% of demand.
- 1.61 Ownership and management of the nationally and regionally significant attraction is dominated (70%) by the public sector, especially Cadw: Welsh Historic Monuments, the National Museums and Galleries of Wales, and local authorities. The private sector is not strongly represented with these operations but is especially active at the local level.
- 1.62 Investment in new attractions in Wales has been slow in the past few years as a result of the precarious nature of demand and the relative paucity of successful applications for Lottery funding. The £45 million National Botanic Garden of Wales in Carmarthenshire that opened in 2000 with 175,000 visitors in its first year of operation, represents the only major new investment.

Scotland

- 1.63 The past year has heralded dramatic changes to the organisation and leadership of tourism in Scotland. The Scottish Executive's '*New Tourism Strategy*' of 2001 resulted in the rebranding of the Scottish Tourist Board as VisitScotland with a new Chair and CEO. This was followed by the appointment of a Minister for Tourism in Scotland and the announcement of a review of the existing structure of area tourist boards (presently 14 in number). A review in 1994 reduced the number of area tourist boards from 31 to 14 and further rationalisation is expected.
- 1.64 Against this background of organisation restructuring, the events of September 11th and the impact of the foot and mouth epidemic had a significant impact on Scottish tourism. International arrivals to Scotland started to decline in the late 1990's after steady growth at the start of the decade. International tourism expenditure in 2000 was at its lowest level since 1993. In 2000, Scotland received 20.7 million tourists who spent £4.5 billion. The UK market remains the most important source for tourists to Scotland accounting for 84.6% of all trips, 72% of all visitor bednights and 66.4% of all expenditure. International tourism accounts for 1.7 million trips and £789 million expenditure.
- 1.65 International tourists are more likely to visit cultural attractions than domestic markets. The Scottish Tourist Board estimate that 83% of all overseas holiday trips to Scotland will include a visit to a castle or historic monument compared to 36% of all UK holiday trips. Similarly, whilst 58% of all international holiday trips will incorporate a visit to a museum/art gallery/heritage centre, only 14% of domestic trips engage in these activities (see Table 19).

Table 19: Activities undertaken by international and UK tourists in Scotland, 1996 and 2000 (%)

	UK holiday trips 2000	Overseas holiday trips

Visiting castles, monuments, churches, etc	36	83
Hiking/walking/rambling/other walking	36	39
Field/nature study	21	9
Watching performing arts	15	16
Visiting museums/art galleries/heritage centres, etc	14	58
Golf	7	2
Fishing	6	1

Source: STB

- 1.66 The leisure day visit market is particularly important for Scotland's attraction industry. The resident population totals 5.1 million (1999 figure) and has a high propensity to undertake leisure day trips.

Northern Ireland

- 1.67 The first comprehensive review of attractions in Northern Ireland was undertaken in 1995. This showed that 4.9 million visits were made to fee charging attractions, an increase of 17% on the previous year. Two years later an estimated 4.1 million visits were made to 132 fee charging attractions. 1995 was a record year for Northern Ireland tourism in general as the area enjoyed an influx of visitors in a year of relative peace and positive marketing. By 1997 the decline in numbers had a particularly strong impact on parks and gardens whilst wildlife attractions and historic properties held up reasonably well.
- 1.68 The period 1998-2000 saw numbers of visits to all attractions in Northern Ireland increase by 5%, once again reflecting a period of relative peace and stability. Indeed, over the period 1988-1999 visits to attractions in Northern Ireland have seen the greatest growth (27%) than any other part of the UK.
- 1.69 The number of attractions in Northern Ireland is 216 or 3% of the UK total. This stock of attractions was visited by 9.1 million people in 1999 or 2% of visits to all attractions in the UK (average of 42,200 per attraction, compared to, say, the average for Wales of 50,400 and 46,600 for Scotland). Unlike other parts of the UK, Northern Ireland has not witnessed a dramatic level of new attraction development in recent years. Indeed two years ago one of the major attractions at the World Heritage Site at the Giants Causeway Visitor Centre (Antrim) was burnt down. In 1999 this attraction was visited by over 433,000 people (free admission).
- 1.70 Other attractions receiving more than 200,000 visits per annum includes:
- The Botanic Gardens, Belfast
 - Belvoir Forest park, Belfast
 - Crawfordsburn Park
 - Ulster Folk Museum
- 1.71 Perhaps more than any other part of the UK, Northern Ireland is heavily dependent upon the domestic day trip market for its attractions business. In 1997, for example, it was estimated that 66% of all visits to attractions were by residents. The tourism markets are fickle and susceptible to the vagaries of the

prevailing political situation. As a result, the market for attractions in Northern Ireland is extremely volatile and unpredictable.

- 1.72 In the past few years there has been a significant investment in leisure and entertainment provision in Belfast and, to a lesser extent, in other urban centres in Northern Ireland. This has created a new competitive environment for the traditional attractions industry. As a result, the challenges faced by attractions elsewhere in the UK are significantly greater in Northern Ireland and will remain so for the foreseeable future.

The Closure of Attractions

- 1.73 Although the growth in the supply of attractions has been the main cause of concern over the past five years there have been a significant number of closures in the industry. It is estimated that between 1978 and 1999 there were almost 860 attractions that ceased trading. These attractions had a total visitor market of 16.3 million (based upon the number of visits in the year they closed). This total represents 4% of the total number of visits to the 6,215 attractions in 1999. The 859 attractions representing 14% of the total stock of attractions in 1999.

Table 20: Attractions which have closed to the public between 1978 and 1999

Category	Number of sites	Number of visits	% of total visits in 1999
Wildlife attractions	42	2,569,311	10.4
Workplaces	121	901,738	9.0
Farms	56	788,604	8.1
Visitor centres	35	1,329,418	6.7
Gardens	59	594,797	3.7
Museums and galleries	263	3,703,508	4.8
Leisure parks	12	1,121,600	2.7
Historic properties	121	993,305	1.5
Steam railways	6	81,577	1.5
Other attractions	141	4,170,419	6.7
Country parks	3	100,175	0.1
All attractions	859	16,354,452	4.0

Source: BTA

- 1.74 The worst affected sector over this 20 year period has been wildlife attractions in terms of the impact on the market. Although only 42 (5%) wildlife attractions closed, they accounted for over 2.5 million visits. The most numerous closures have occurred in the museums and galleries sector with 263 (31%) ceasing trading. There have been a number of large scale and some high profile attractions that have closed since 1978. These are shown in Table 21.

Table 21: Notable Closures 1977-2000

Attraction	Visits in last year	Year of closing
Windsor Safari Park	899,076	1991
Belle Vue 200, Manchester	434,400	1977

Guinness World of Records, London	312,000	1994
Birmingham Museum of Science	287,339	1996
Royalty and Empire, Windsor	175,000	1993
National Shire Horse Centre, Plymouth	150,000	1996
Spitting Image, London	120,000	1992
Premier League Hall of Fame, London	100,000	2000

Source: BTA

- 1.75 In 1999 46 attractions closed. This represented 0.7% of the total number of attractions and accounted for 1.3 million visits (0.3% of the total visitation). These closures included the Exploratory in Bristol, Penscynor Wildlife Park in Swansea and the Dungeons of Windsor.

Consumer Behaviour

- 1.76 In the UK as a whole it has long been recognised that visits to attractions represents a relatively small share of the total day trip market for leisure activities. Visits to all types of managed sites and events account for about 11% of the total day trip market with the 404 million visits to attractions representing between 5-6% of this total demand. In theory, therefore, there is considerable scope for attractions to gain greater market share.
- 1.77 In order to examine consumer behaviour within the attractions sector in more detail, MINTEL commissioned NOP World to undertake a survey of over 2,000 consumers in Winter 2001 specifically for this study. The results of this survey reveal a more positive market response than that identified in previous surveys with just 43% of respondents stating that they had not visited an attraction in the past 12 months. This apparent uplift in overall demand amongst UK residents may well be explained by the fact that foot and mouth had prevented people from participating in other forms of leisure day trip activities.
- 1.78 As a result, the predominantly urban-based attractions were the net beneficiaries of this situation. At present data from other sources is not available to corroborate the findings of this Winter 2001 survey. If these findings are correct then the clear challenge to the attractions industry is to ensure they retain this increased market share.
- 1.79 In terms of the findings of this survey, although the leading theme parks dominate individual performance (11% of respondents stating they had been to Blackpool Pleasure Beach in the past 12 months, 8% to Alton Towers and 4% to Chessington World of Adventures) the market is dominated by heritage attractions with 86% of respondents stating they had visited, compared to 41% visiting leisure attractions. The market is, however, evenly split male:female and geographically focused. Core catchments relate closely to regional TV companies.
- 1.80 Different types of attractions appeal to different markets according to life stage and life style. Once again there is, however, considerable variation within markets for each type of attraction. Broadly speaking theme and leisure parks have greater appeal to pre-family and families with older children, whilst heritage attractions are more likely to be visited by adults and families with younger children. Families with children represent just 30% of the visits to attractions made by respondents to this survey. The BTA estimates that 31% of all visits to

attractions are by children and the attractions with the highest percentage of children are farms (46%) and leisure parks (43%).

- 1.81 In terms of general market perceptions the NOP World survey showed that UK attractions tend to be regarded as good value for money and their facilities (cafes and shops) and well used. It is apparent that the UK market does not like queuing and shows a preference to visit outside of peak periods.
- 1.82 The importance of having a range of sources of revenue is increasingly understood by attraction managers. Over the past ten years revenues at UK attractions have increased 100% to an estimated £1,400 million in 1999. On average 49% of revenues come from admission charges, 41% from retailing and 10% from catering. It should be remembered, however, that 2,531 (41%) of UK attractions provide free admission. For those charging admission the average adult charge in 1999 was £3.13, with the highest charge for leisure parks (£7.69).

Science Centres

- 1.83 One of the most important trends in product development in the UK over the past 15 years has been the emergence of science centres. Today there are an estimated 80 science centres whose primary purpose is to communicate scientific principles in user friendly environments. The early pioneers of this new genre of visitor attraction were the interactive centres in Bristol (The Exploratory) and in Cardiff (Techniquest) both opening in the mid 1980's.
- 1.84 The availability of funds from the National Lottery, especially for special projects for the Millennium, stimulated and accelerated growth. The Guardian newspaper (February 21, 2002) estimates that the Millennium Commission alone invested over £250 million into new science centres. Match funding has been secured from sponsors, trusts and foundations as well as regional grants. As a result, over half a billion pounds has help establish 40 independent science centres across the UK. These complement the popularisation of science focus that characterises the new investment in new facilities at museums, zoos and botanic gardens.
- 1.85 ECSITE-UK is the network now representing these centres and co-ordinating their activities in the UK with the wider European network of centres. ECSITE-UK estimates that over 90% of the UK population now lives within a two hour drive of a science centre. Despite this demographic connection the majority of the new centres are struggling to meet their original projected targets; revenues are non-sustainable; and, on-going subsidies are necessary. The root problem is that there is now an over supply of this type of attraction. The primary aim of the rationale for these centres was the interpretation of science to a broad market base. By creating leisure attractions as the main vehicle for the delivery of this scheme, the centres are in direct competition with the other 6,000 or so attractions in the UK.

Table 22: A sample of UK science centres opened since 2000

Centre	Location
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Dynamic Earth	Edinburgh
Science Centre	Glasgow
Discovery Centre	Dundee
The Big Idea	Irvine
Science Centre	Aberdeen
Magna	Rotherham
The Earth Centre	Doncaster
Science Centre	Norwich
Space Centre	Leicester
Helix	Newcastle
@Bristol	Bristol
Science Centre	Birmingham
Science Centre	Oxford
Science Centre	Belfast

Other New Developments

- 1.86 The heavy capital investment in Millennium projects has prompted an on-going investment in the upgrading of some existing attractions as well as encouraging a number of other large scale investments designed to stimulate regional development. The former is well illustrated by the £75 million redesign of the Science Museum in London, the £31 million refurbishment of the Victoria and Albert Museum, the £5 million restoration of Whitby Abbey, the £5 million refurbishment of the Jorvik Viking Centre (York) and the £2 million enhancement of Cadbury World in Birmingham.
- 1.87 In terms of large scale investment in new attractions as a means of stimulating regional economies, good examples include:
- Lomond Shores, a £60 million attraction with retail development on the southern end of Loch Lomond in Scotland, due to open in July 2002
 - The proposed £75 million National Waterfront Museum in Swansea scheduled for a 2005 completion in a joint venture between the City and County of Swansea with the National Museums and Galleries of Wales
 - The construction of 'Action Stations' as part of a £150 million development programme at Portsmouth harbour, building upon the success of the historic dockyard
- 1.88 In addition there are a number of large schemes at an early stage of development and planning. Most are linked in some way or another to a corporate or industrial business interest. For example, the BBC is considering a '*Dinosaur World*' that aims to capitalise on the popularity of the documentary '*Walking with Dinosaurs*'. Film studio attractions have been suggested for sites in Scotland and Wales amidst considerable scepticism following the failure of Legend Court (Wales) and Universal Studios (Essex) to secure planning permission and the recent closure of Granada Studio Tours in Manchester. Some observers feel that the opening of the new film studio attraction at Disneyland Paris in spring 2002 will satisfy demand from the UK market. In the

heritage sector there continues to be protracted debate about the future management and facilities at Stonehenge.

- 1.89 The need for attractions managers to seek new venues as well as new products is revealed in the development of sports-based attractions at stadia. The new National Football Museum opened as an integral part of Preston North End's new stadium and the Welsh Rugby Union will be developing *'The World of Rugby'* as part of the Millennium Stadium in Cardiff in the next few years. Elsewhere the major shopping Mall at Trafford Park seems set to become the venue for a new concept that combines an aquarium with a swimming pool.
- 1.90 Innovation and creative solutions to product, theming and location will characterise the next five years in the UK attractions sector. Growth is likely to continue but attractions will become more closely integrated with other leisure facilities. A new generation of leisure destinations is set to emerge that will offer consumers a one-stop solution. The most comprehensive model of this type of attraction destination is that emerging for the Cardiff International Sports Village. This is a £700 million development being jointly initiated by Cardiff County Council and Philips projects. Others will follow especially on extensive sites that were formerly heavy industry plants and where other forms of land use maybe less appropriate than leisure. Examples of potential sites include: Ravenscraig (Scotland), Llanwern (Wales) and Battersea Power Station (London).

Merlin Entertainment Ltd

- 1.91 Merlin is a management buy-out company from the Vardon Group that owned and operated aquaria, health and fitness centres, bingo clubs, as well as the London and York Dungeons. The Group's main brands today are (i) Sea Life, (ii) Dungeons and (iii) Sanctuaries.
- 1.92 Today Merlin has a number of operational divisions including *'Merlin Attractions Management'* with a strong presence in the UK, Germany and increasingly France where it is the only attraction company to partner a Disney resort.
- 1.93 The Group is one of the top three European Attraction Operators in Europe and the largest multi-site operator of visitor attractions in Europe with 20 attractions in seven countries. These 20 attractions handled 6 million visitors in 2001 and employed some 800 people.
- 1.94 Recent and current projects include:

Contracts

Wedgwood Visitor Centre – Staffordshire, England
Space Park – Bremen, Germany
Tchibo Coffee Museum – Hamburg, Germany
Earth Explorer – Ostend, Belgium
British Music Centre – London, England
TV World – Hamburg, Germany

SeaLife

Marne La Vallee, Paris opened Easter 2001

Linnemaki, Helsinki due to open June 2002-03-12 Travelling SeaLife concept due to start construction
Berlin SeaLife stated to open Easter 2003

Dungeons

Hamburg Dungeon opened Easter 2000
Edinburgh Dungeon opened Easter 2001
German Dungeon (location to be announced) 2002

The Tussaud's Group Ltd

- 1.95 This was another attraction company resulting from a management buy-out from the former parent company, Pearsons, in 1999. The Tussaud's Group Ltd has seven major shareholders, these being six directors owning 50% of the share issue and Charterhouse Development Capital owning the other 50%.
- 1.96 The Group owns and manages six major visitor attractions in England: Alton Towers Park, Chessington World of Adventure, Madame Tussaud's, the London Planetarium and Warwick Castle. Collectively these accounted for over 6 million visitors in 2000. In addition, the Group manage the operations and marketing of the British Airways London Eye on behalf of the London Eye Company.
- 1.97 Aside from the Millennium Dome, the BA London Eye was the UK's most visited attraction in 2000 and, probably, in 2001 with over 3 million visitors.
- 1.98 The Tussaud's Group Ltd has established an international reputation for judicious investment in new rides and facilities at its theme parks in order to retain market share. As a result the past few years has witnessed major investments at Alton Towers and Chessington World of Adventures, including 'Air', the new ride at Alton Towers for 2002 at a cost of £12 million, and three new attractions at Chessington World of Adventures ('Vampire', 'Tomb Blaster' and 'Dennis's Madhouse') for 2002.
- 1.99 At Warwick Castle the Group have focused more on interpretation and animation with events as the main reason to attract repeat business. This includes a regular programme of outdoor classical and popular music concerts.
- 1.100 The Tussaud's Group bought Warwick Castle from son of the 7th Earl of Warwick in 1978. The Group have since carried out extensive restoration work whilst opening up areas of the Castle that were previously closed to the public. Today the Castle welcomes nearly 800,000 visitors per year (i.e., 793,000 visits in 1999 and 793,300 in 2000). It is amongst the ten most visited historic houses and castles in the UK – after the Tower of London, Edinburgh Castle, and Windsor Castle.
- 1.101 Attractions at Warwick Castle opened during the past 20 years are based on themed interpretation and entertainment through the use of wax models and animation by the Tussaud's Studios. They are the *Royal Weekend Party* (1982) and the *Kingmaker* (1994), a multi-million pound attraction in the Castle's mediaeval undercroft.

Table 23: Visitor Numbers for Tussaud's Group Attractions

Attraction	Visitor Numbers	
	1999	2000
Alton Towers	2,650,000	2,450,000
Chessington World of Adventures	1,550,000	1,500,000
Madame Tussaud's (including the Planetarium)	2,640,000	2,388,000
Thorpe Park	926,000	925,000
Warwick Castle	793,000	793,300

- 1.102 The Tussaud's Group have also diversified into the accommodation sector by providing a themed, on-site hotel at Alton Towers. This follows a recent trend with similar provision at Phantasialand (Germany) and De Effeling (Netherlands).