

Visitor Attractions - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of the cost-of-living crisis on visitor attractions.
- How the visitor attractions market is recovering from the negative effects of COVID-19.
- Participation and future interest in visiting different types of attractions.
- Consumer perceptions of different visitor attractions.
- Future opportunities in the visitor attractions market, including how the sector can better utilise new technology.

Despite economic concerns moving to the fore of consumers' minds, visiting attractions remains a valued pastime for many. 84% say they are likely to visit an attraction in the next 12 months, with a diverse range of attractions on offer to cater for all demographics.

Price is the overarching barrier to visiting attractions. This is particularly the case for families, with 52% of parents saying the reason they have not visited an attraction in the last 12 months is due to them being too expensive, compared to 41% of those without children. However, 91% of parents of under-18s say they are likely to visit an attraction in the next year, suggesting that operators who offer families discounts or ways to save money are likely to appeal.

The COVID-19 pandemic brought with it a wave of loneliness for many consumers, which had a knock-on impact on visitor attractions. 23% of those in single-person households cite not having anyone to go with as a reason why they have not visited an attraction in the last 12 months. Attractions have a big opportunity to promote mingling events to bring people together to enjoy attractions, with successful examples including the Science Museum Lates and The Shard Silent Discos.

Despite the rising cost of living, a significant number of attraction visitors are still willing to pay more for extras or add-ons. Parents are keen to prioritise convenience and ease whilst visiting attractions, and nearly half are likely to



“Despite the rising cost of living, and subsequent squeeze on disposable incomes, visitor attractions remain a popular pastime for many.”

– Jennie Bryans, Leisure & Travel Analyst, December 2022

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Visitor Attractions - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

pay more for such options, including fast-track queues, virtual queueing options and exclusive tours. Brands should promote the convenience aspect for parents, which will enable families to enjoy attractions to a greater and less stressful extent.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for visitor attractions**
Figure 1: Category outlook, 2022-27
- **The market**
- **Market closing in on pre-pandemic levels**
Figure 2: Market size for UK visitor attractions, 2017-22
- **Volume expected to fully recover in 2023**
Figure 3: Market forecast for visits to UK visitor attractions, 2017-27
- **Historic properties and gardens come out on top**
Figure 4: Attraction admission trends in England, 2017-21
- **Companies and brands**
- **Battersea Power Station reopens following a £9 billion redevelopment project**
- **Guinness visitor attraction to open in London**
- **Eden Project North gains planning permission**
- **Game of Thrones Studio Tour opens**
- **The consumer**
- **Attraction visiting increases but remains below pre-pandemic levels**
Figure 5: Percentage of UK adults who visited attractions in the previous 12 months, 2017-22
- **Cities are still the most visited locations for attractions**
Figure 6: Locations of attractions visited in the previous 12 months, 2021 and 2022
- **Gardens remain most visited attraction...**
- **...but historic buildings and museums recovered well in 2022**
Figure 7: Type of attractions visited in the previous 12 months, 2019, 2021 and 2022
- **Eight in 10 likely to visit an attraction over the next year**
Figure 8: Interest in visiting attraction types in the next 12 months, 2022
- **Price is overarching barrier to visiting an attraction**
Figure 9: Barriers to visiting attractions, 2022
- **Price is deemed the overarching factor when choosing attractions**
Figure 10: Important factors when choosing a visitor attraction, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Opportunity for operators to upsell**
Figure 11: Attitudes towards visitor attractions, 2022
- **Operators should explore virtual queuing systems**
Figure 12: Attitudes towards visitor attractions, 2022
- **Theme parks deemed to be fun but expensive**
- **Zoos are popular with families, but ethical credentials in contention**
Figure 13: Correspondence analysis of perceptions of visitor attractions, 2022

ISSUES AND INSIGHTS

- **Rising cost of living will squeeze discretionary spending**
- **Garden attractions can tap into wider green-fingered trends**
- **Opportunity for VR to reach new heights in the attractions market**

MARKET SIZE AND PERFORMANCE

- **Market closing in on pre-pandemic levels**
Figure 14: Market size for UK visitor attractions, 2017-22

MARKET FORECAST

- **Visitor attractions recovering well from the impacts of the pandemic**
Figure 15: Category outlook, 2022-27
- **Volume expected to fully recover in 2023**
Figure 16: Market forecast for visits to UK visitor attractions, 2017-27
- **Learnings from the last income squeeze**
- **Forecast methodology**

MARKET SEGMENTATION

- **Historic properties and gardens come out on top**
Figure 17: Attraction admission trends in England, 2017-21
- **Windsor Great Park comes out on top for the first time**
Figure 18: Top 20 UK visitor attractions, 2021
Figure 19: Image of Windsor Great Park, 2022

MARKET DRIVERS

- **Inflation is the key concern for consumers and brands... leading to consumer spending power being curbed**
- **Consumers' financial wellbeing has fallen from the highs of 2021**
Figure 20: Household financial wellbeing index, 2016-22

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **2022 presented both challenges and opportunities for the domestic market**

Figure 21: Volume and value of domestic holidays taken by British residents, 2015-22

- **Warmer weather increases the appeal of the UK as a domestic holiday destination**

Figure 22: UK mean temperature in °C, by quarter, 2013-22

- **A weaker pound expected to encourage more international tourists**

LAUNCH ACTIVITY AND INNOVATION

- **Launch activity at London’s attractions**
- **Battersea Power Station reopens following a £9 billion redevelopment project**
- **The View from the River**
- **Museum of London prepares to move to new home**
- **MSG Sphere gets green light**
- **Guinness visitor attraction to open in London**
- **Museum operators embracing VR**
- **Climb the Cutty Sark**
- **Launch activity in the rest of the UK**
- **Eden Project North gains planning permission**
- **OTHERWORLD VR continues expansion**
- **Wake the Tiger opens in Bristol**
- **Game of Thrones Studio Tour opens**
- **Eureka! Science + Discovery Centre opens its doors**

ATTRACTION VISITING IN THE LAST 12 MONTHS

- **Attraction visiting increases, but remains below pre-pandemic levels**

Figure 23: Percentage of UK adults who visited attractions in the previous 12 months, 2017-22

- **Older consumers remain wary about exposure to COVID-19**

Figure 24: Percentage of UK adults who visited attractions in the previous 12 months, by demographics, 2022

- **Cities are still the most visited locations for attractions**

Figure 25: Locations of attractions visited in the previous 12 months, 2021 and 2022

TYPES OF ATTRACTION VISITED

- **Gardens remain most visited attraction...**
- **...but historic buildings and museums recovered well in 2022**

Figure 26: Type of attractions visited in the previous 12 months, 2019, 2021 and 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Older women enjoy visiting gardens**
- **Younger men more likely to visit a factory tour**
- **Theme parks, zoos and aquariums remain popular activities for families**

Figure 27: Type of attractions visited in the previous 12 months, by parental status, 2022

FUTURE INTEREST IN VISITING ATTRACTIONS

- **Eight in 10 likely to visit an attraction over the next year**
Figure 28: Interest in visiting attraction types in the next 12 months, 2022
- **Gen Zs more likely to be thrill seekers...**
Figure 29: Thorpe Park homepage, November 2022
- **...whilst older generations take a more leisurely approach to visitor attractions**
Figure 30: Interest in visiting attraction types in the next 12 months, by generation, 2022
- **Lower-income households put off by expensive entry costs**

BARRIERS TO VISITING ATTRACTIONS

- **Price is overarching barrier to visiting an attraction**
Figure 31: Barriers to visiting attractions, 2022
- **Single city dwellers struggle to find companions to visit attractions with**
- **Families struggle with cost of attractions**

IMPORTANT FACTORS WHEN CHOOSING VISITOR ATTRACTIONS

- **Price is deemed the overarching factor when choosing attractions**
Figure 32: Important factors when choosing a visitor attraction, 2022
- **Accessibility is also a high priority for consumers**
- **Younger consumers keen for flexibility and online booking**
Figure 33: Important factors when choosing a visitor attraction, by age, 2022
- **Attractions with appealing pricing and accessible locations will interest the vast majority**
Figure 34: TURF Analysis – Visitor attractions, 2022

VISITOR ATTRACTIONS AND PRICING PREFERENCES

- **Eight in 10 more likely to visit free attractions**
Figure 35: Attitudes towards visitor attractions, 2022
- **Opportunity for operators to upsell**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Parents keen for convenience**

Figure 36: Attitudes towards 'I would pay more for extras at UK visitor attractions (eg queue skipping, exclusive tours)', by demographics, 2022

Figure 37: Alton Towers Fastrack options, 2022

VISITOR ATTRACTIONS AND TECHNOLOGY

- Operators should explore virtual queuing systems**

Figure 38: Attitudes towards visitor attractions, 2022

- Large proportion of consumers experiencing digital fatigue**

Figure 39: Attitudes towards 'I would be interested in attending an event using virtual reality (VR)', by age and gender, 2022

Figure 40: Attitudes towards 'I would be interested in paying to live stream an event held by a UK visitor attraction (eg behind the scenes tour, exhibition)', by age and gender, 2022

PERCEPTIONS OF VISITOR ATTRACTIONS

- Theme parks deemed to be fun but expensive**

Figure 41: Kellogg's 'Grownups Go Free' promotional advert, December 2022

- Opportunity for art galleries to work on image**
- Gardens and museums seen in positive light amongst consumers**
- Zoos are popular with families, but ethical credentials in contention**

Figure 42: Correspondence analysis of perceptions of visitor attractions, 2022

Figure 43: Perceptions of visitor attractions, 2022

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations**
- Consumer research methodology**
- Correspondence analysis methodology**
- TURF Methodology**

APPENDIX: FORECAST METHODOLOGY

- Market forecast and prediction intervals**

Figure 44: Lower bound, central and upper bound volume forecast for visits to UK attractions, 2021-27

- Market drivers and assumptions**
- Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.