BAKERRICHARDS

35-54s without children at visitor attractions

Research report
Commissioned by ALVA
Prepared by Baker Richards
June 2026

Image: National Trust Fountains Abbey and Studley Royal Water Gardens

Contents

Introduction from Baker Richards

We are pleased to share our new research into adults aged 35 to 54 who do not have dependent children, commissioned by the Association of Leading Visitor Attractions (ALVA).

One of the fastest-growing household types in the UK, the **adults aged 35-54 without dependent children** demographic is a substantial, high-value market for attractions. However, this market can be overlooked, with visitor attractions having a clearer steer of family or older visitors' requirements and preferences. The aim of this work was to understand the group's potential together with the barriers that keep them away and what turns interest into a visit.

Drawing on a **Census-balanced survey of UK adults** this report explores who this audience is, what they want from a day out, how they choose, and what they will pay.

Our thanks go to Bernard Donoghue and the ALVA team, and to the member organisations who helped shape this work. If you would like to explore what any of this might mean for your organisation, we would be happy to discuss further: info@baker-richards.com.

David Reece, Chief Strategy Officer

Baker Richards

Introduction from ALVA

ALVA is delighted to publish this new research into adults aged 35 to 54 without dependent children at home, undertaken for us by Baker Richards. It is the second study we have commissioned from the Baker Richards team, following last year's report on the family market, and together they give our members and the wider sector a much fuller picture of two of the largest audience groups for UK attractions today.

Our members have for some time been asking for a proper evidence base on this audience, which is rising in size at a moment when the cost-of-living crisis is putting real pressure on both the leisure pound and the leisure hour. The findings speak directly to the questions members have been raising with us, on pricing, on programming for adult visitors, on repeat visit and membership design, and on questions of belonging that sit alongside the commercial ones.

Our thanks go to David Reece, Libby Papakyriacou, Sam Price and the wider Baker Richards team, and to colleagues across our membership who helped shape the work.

At ALVA we have always believed that the more great sector insight we can share, the stronger and more sustainable individual businesses will be, and we are pleased to share this research with the broader visitor economy.

Bernard Donoghue OBE, Chief Executive

Association of Leading Visitor Attractions (ALVA)

This report, objectives and audience

This Report

ALVA commissioned Baker Richards to understand the visitor attraction market of adults aged 35 to 54 who have no dependents, a group that maps onto the fastest-growing UK household type.

Findings are based on a UK-wide Census-balanced survey fielded 21 April to 6 May 2026: 2,397 adults screened, of whom 1,186 (49%) attend visitor attractions.

For references, please visit the appendix.

A note on language: “adults 35 to 54 without children” is used as shorthand and is not intended to flatten the diversity of people’s circumstances or relationships.

Our objectives

Our objectives for this market research were to:

- Understand the potential of this demographic
- Explore barriers to visit
- Segment the group to better understand its nuances
- Look for opportunities: for growth, income and engagement

Who this research is for

Primarily for visitor attractions, based in the UK, however findings may be relevant further afield, or in other, related fields such as performing arts attendance. The report covers approaches to marketing, membership, programming and visitor experience, so is relevant to a broad range of professionals working in the visitor attraction industry. From a strategic point of view, the report sizes this fast-growing market, identifying opportunities for growth to underpin future organisational strategy.

Executive summary (1/2)

A large and high-value market

There are around 7.6 million adults aged 35 to 54 in the UK without dependent children at home. They spend roughly £5 billion a year on discretionary leisure overall, of which an estimated £400 to £500 million currently goes to visitor attractions. Around 3.69 million are current attenders (the 49% in this study who visit attractions). Including prospective visitors, the addressable population is in the region of 4 to 5 million.

Stated needs and attitudes are more useful for targeting than demographics

Age, gender, household composition, free time and region show very little association with how a person responds to the kinds of offer attractions make. This market divides into four needs-based groups, which we have named Sociables, Explorers, Restorers and Purists.

Cost is the main constraint on visiting, ahead of interest

37.5% of the audience overall, and 45% of Restorers, name price as the most decisive factor in deciding whether to visit. The free-Saturday comparison shows why: with no money worries, cultural visits roughly treble, from 7.5% to 22%, and staying at home falls from 35% to 9%. A standard adult admission of £25 to £40 sits within the audience's acceptable range. Willingness to pay for premium evening events varies by segment, with Sociables paying more than the other three.

The family-feel barrier is smaller than the sector generally assumes

24% of the audience say a venue feeling aimed at families would put them off, but only 14% have actually walked away from a planned visit for that reason. The 10-point gap appears across every segment, suggesting clearer signalling about adult visitors being welcome and catered for offers a lower cost approach to converting this audience than thinking about different adult-only programming.

Findings continued on the next page

Executive summary (2/2)

The drivers people cite differ from the drivers that correlate with actual visit frequency

Transport, food quality and price clarity are most often given as reasons to visit more, and their absence at a visitor attraction does deter people, but the drivers most strongly associated with higher-frequency visiting are programming-led: expert-led sessions, adult-specific events, multi-venue membership and seasonal programming. Each of which is associated with around twice the odds of being a higher-frequency visitor.

A significant proportion of visitors have felt unwelcome at visitor attractions: a challenging finding

20% of the audience have felt actively unwelcome at a visitor attraction at some point. Neurodivergent visitors are 1.9 times as likely to report the experience as the rest of the audience; global majority visitors are 1.5 times as likely. The kinds of intervention they imply (staff training, recruitment, visible representation) sit at organisational level.

We tested a range of add-on experiences and found a clear front-runner

Of the five additional experience formats tested, the half-day expert-led skill session generated 69% interest across the audience, rising to 92% within Explorers and reaching 32% even within the hardest-to-engage Restorers. It is the only format to cross every segment at meaningful levels of interest.

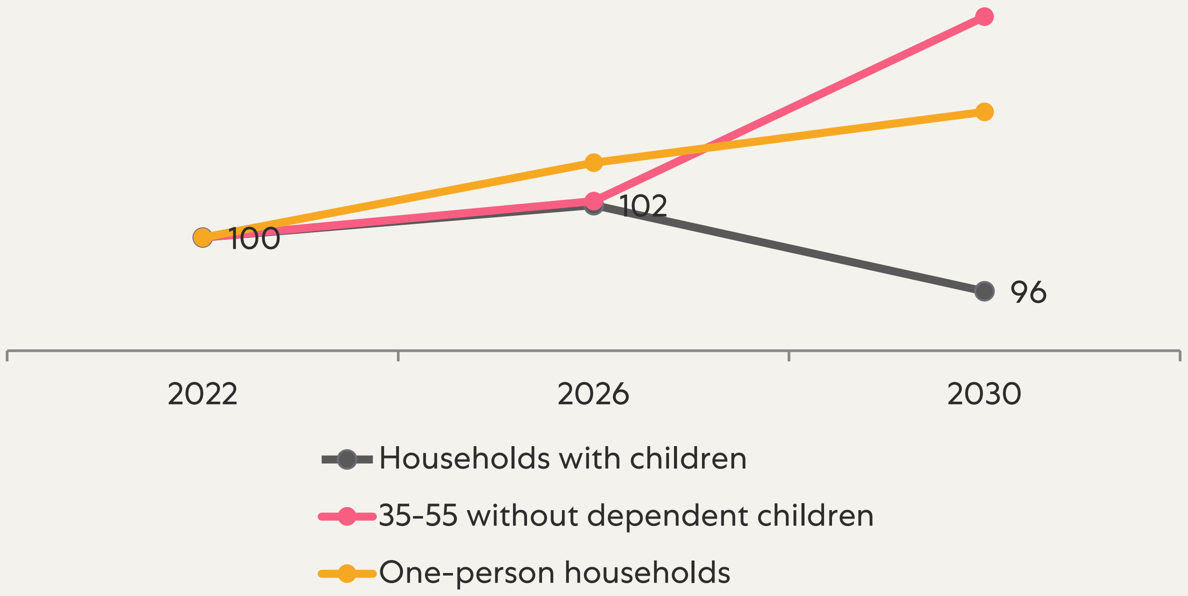
Setting the scene

Why now: a fast-growing, more intentional audience

Adults without dependent children are the fastest-growing household type in the UK…

43% of all 35-54s in England & Wales have no dependent children in the household – 6.37m of 14.93m

ONS projects that households of adults without dependent children will sharply increase, overtaking households with children in 2030. As this group grows and casual visiting falls, attractions need a deliberate reason for them to visit.



Indexed to 2022 = 100. ONS 2022-based household projections, England. See appendix.

…And the sector model around them is straining

165m total visits to ALVA sites in 2025.
Up 2% on 2024, but still 9% below 2019.

82% UK weekday high street footfall has recovered to about 82% of pre-pandemic levels; casual attendance impacted

27% UK price growth since 2019 (UK CPI).
The cost-of-living squeeze on the leisure pound.

Our survey: methodology

Our survey was distributed 21 April – 6 May 2026 to a Census-balanced panel.

We screened participants to focus on UK-based adults aged 35-54, with no parental caring responsibility for children aged 0-17.

We then undertook a further screening of a wide pool of 2,397 using the question: “Which of these statements best describes your current relationship with visitor attractions”. We included participants who responded positively. Sub-group figures use smaller bases, noted on the relevant pages.

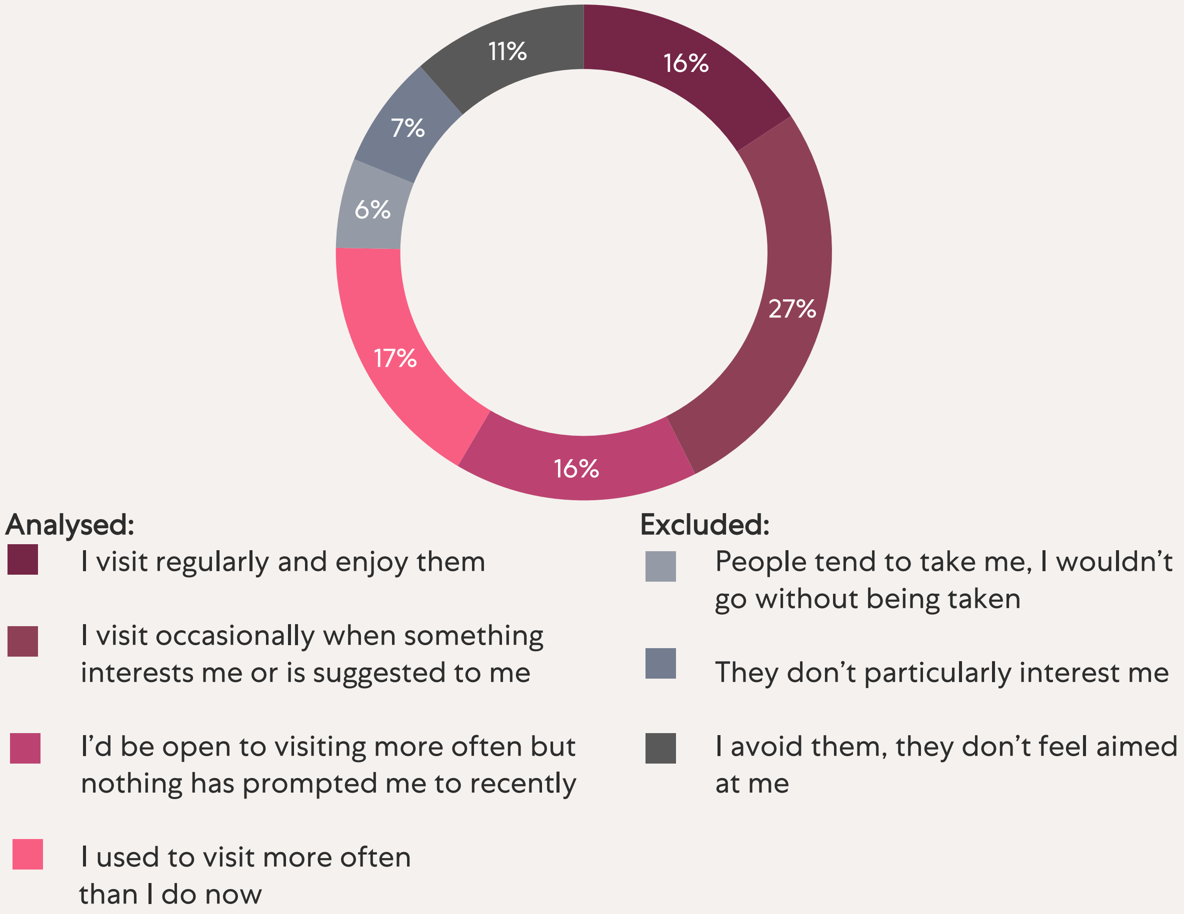
Given the additional screener question about visitor attraction engagement, we undertook no weighting on the sample. For a view on the demographic split of our sample, please see the appendix.

Limitations: Behaviour and spend are self-reported, drawn from a single fieldwork window; sub-segment findings carry wider margins of error.

Note on fielding window. The survey was open from Monday 21 April to Tuesday 6 May 2026. References to 'last Saturday' in the data therefore relate to the Saturdays of 18 April, 25 April and 2 May 2026. These weekends sat within the seventh-warmest April on record for the UK, with 23% below-average rainfall and the fourth-sunniest April since 1910. The weather almost certainly increased outdoor and free-activity choices and reduced indoor-attraction choices over the reference window.

Which of these statements best describes your current relationship with visitor attractions?

n=2,397



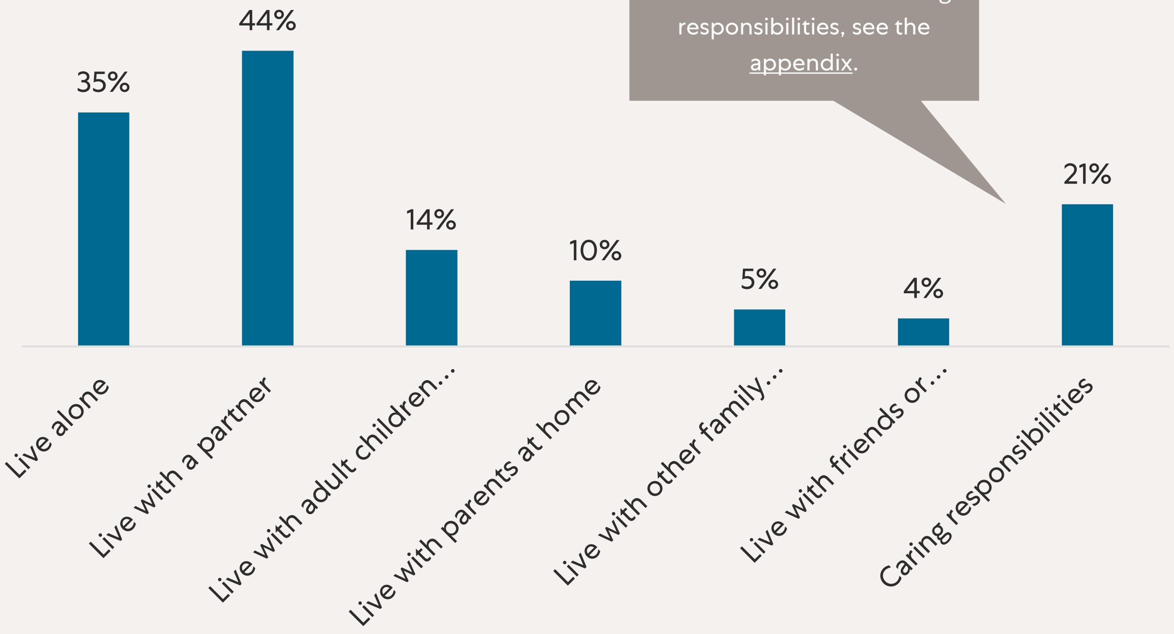
Who they are, and why demographics won't help you target them

Spread across age groups, location & living situation

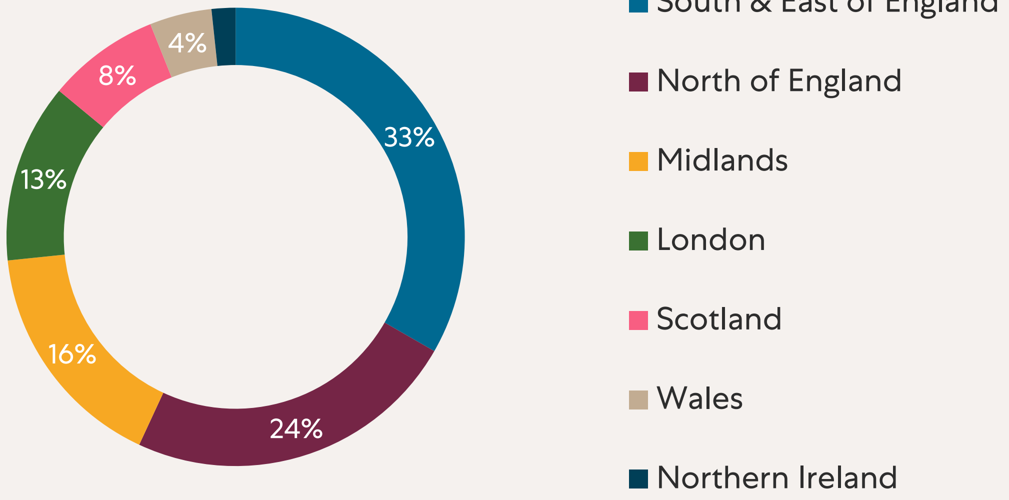
Our sample is broad, covering the breadth of the UK and age bracket. Their living situation is similarly varied, with 35% living alone; 14% living with adult children and 15% living with other family members. For further detail on demographic spread, see the appendix.

Living Situation

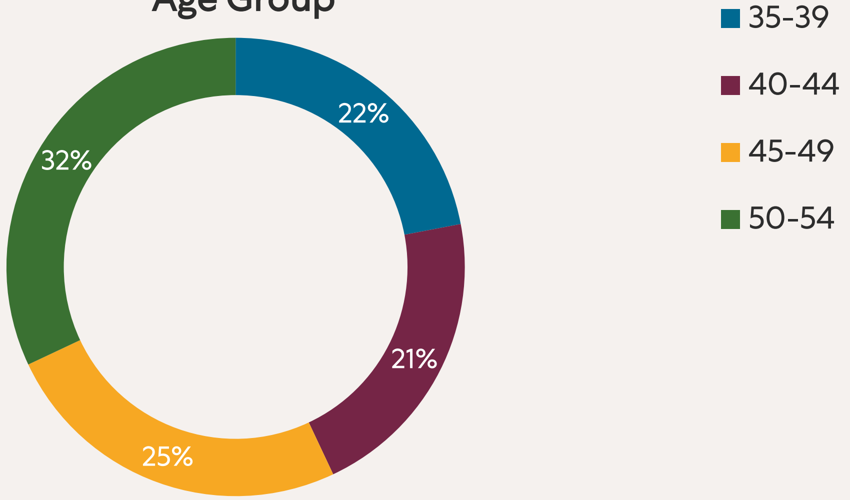
For details on differences in needs for those with caring responsibilities, see the appendix.



Region



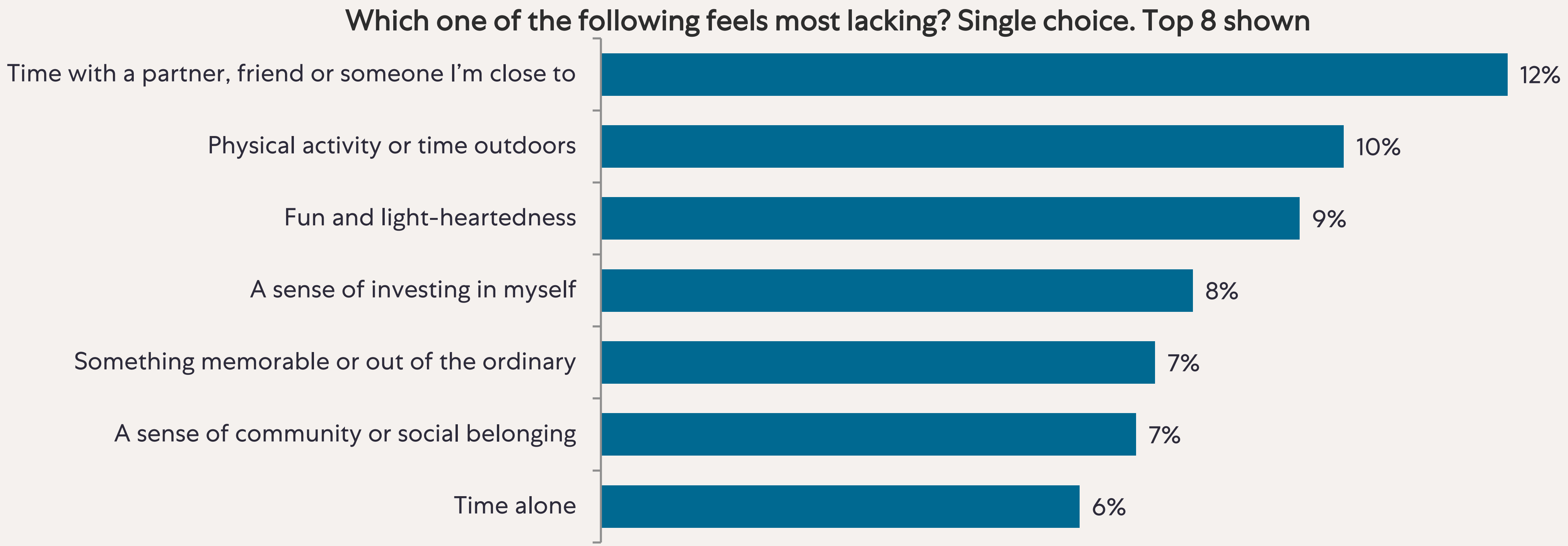
Age Group



Survey question wording: Region: Which region do you live in? Age Group: Which of these best describes your age group? Living Situation: Which of these best describes your living situation? Select all that apply.

Rest and connection are missed by this group

When asked what is most lacking in their lives, this audience names rest and connection (rest 13%, time with someone close 12%, feeling balanced 11%). Four of the top five answers are about restoration or small social moments.

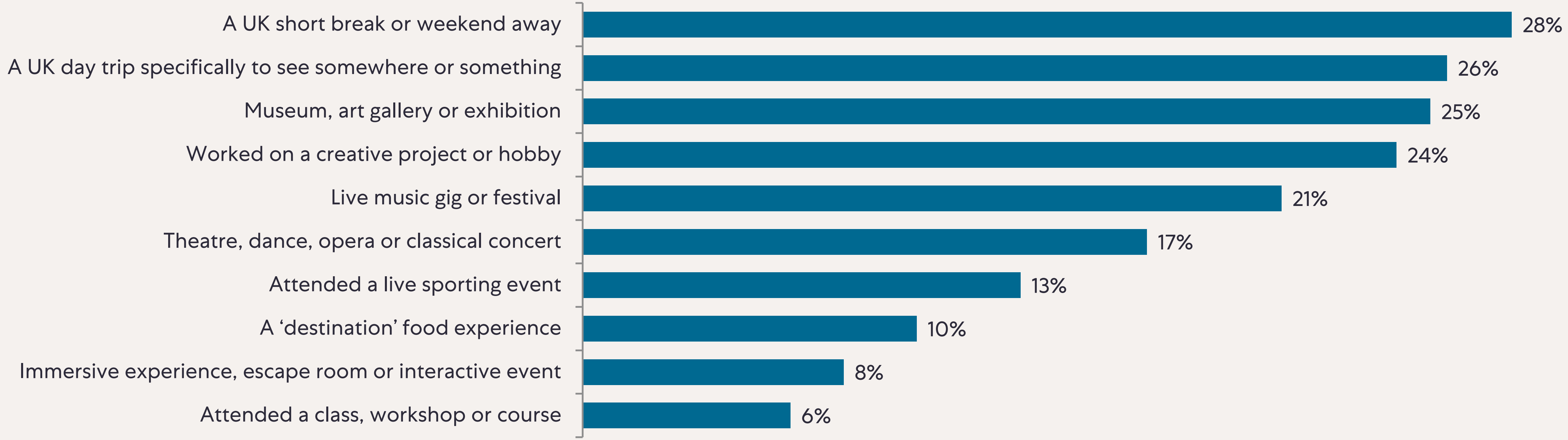


A version of this chart displaying all options is available in the appendix

43% have taken a short break or day trip recently

This is an engaged group of people: 43% have travelled around the UK recently, and museums, galleries, creative activities and live music are all popular. Their low attendance is a cost effect rather than a sign of disengagement. The same people are travelling, seeing live music and making things.

In the last few months, which of the following have you done in your free time?
Select everything that applies. Cultural / entertainment / tourist options shown



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Beyond the demographic: 4 needs-based segments

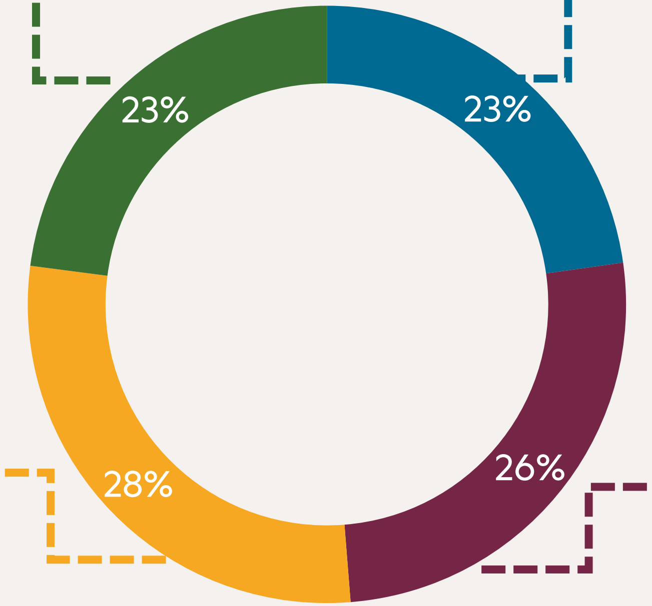
Detailed statistical analysis revealed 4 clear segments, predicted by leisure spend, membership and how they describe what they want from a day out. Each segment has very different needs to be addressed.

Sociables

The premium segment, wanting a buzzy experience, prioritising food and drink.

Purists

Not interested in bells and whistles, just the experience itself. They're looking to learn new things.



Restorers

Hardest to engage – looking to switch off, somewhere familiar.

Explorers

Willing to try new things, but overall looking for something relaxing rather than provoking.

The size of the prize - people

3.69m reachable audience

Purists

23% of reachable market

841,000 people

Explorers

26% of reachable market

959,000 people

Restorers

28% of reachable market

1,047,000 people

Sociables

23% of reachable market

847,000 people

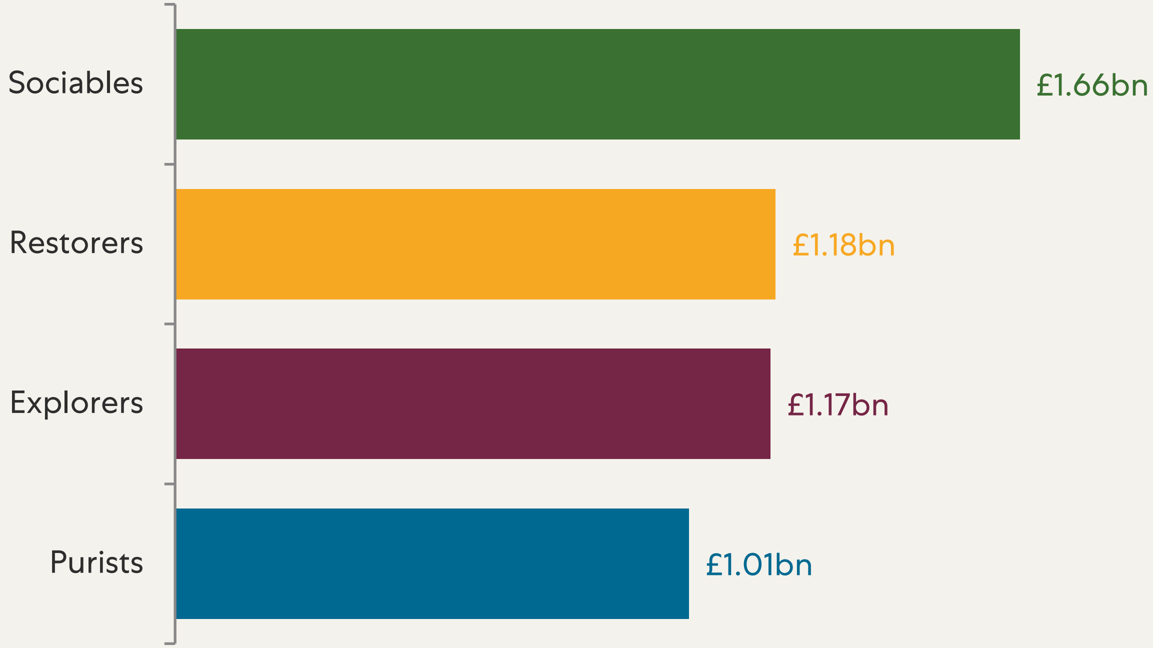
Methodology: 7.6m UK adults aged 35 to 54 with no dependent children (ONS mid-2024 population estimates × 43% incidence rate from ONS Census-based household projections) × 49% who attend visitor attractions (screening rate in this study) = 3.69m reachable audience. Segment splits applied from the analysis sample.

The size of the prize - spend

£5bn total annual discretionary leisure spend

Sociables spend far more per head (£1,955) than the other three segments (around £1,100 to £1,200), so they account for a disproportionate share of the £5bn.

Total annual leisure spend



Per-person annual leisure spend

£1,955 Sociables

£1,124 Restorers

£1,221 Explorers

£1,205 Purists

Methodology: per-person annual leisure spend = mean of monthly leisure-spend band midpoints × 12, computed by segment on the analysis sample. Annual segment total = per-person × reachable population. Total £5bn is the sum across segments. Figures are discretionary leisure spend overall (food, drink, events, days out, classes, subscriptions, not just attractions). Attractions-specific share is approximately 8 to 10% of this, around £400-500m a year.

Sociables (23% of audience, 847,000 people)
Highest paying; premium experiences; atmosphere, company, sense of occasion

Wants

Buzzy social atmosphere (62%)

Food and drink central (62%)

Experiences to talk about and share

Comfort and quality touches

Cause-led programming is net positive (+32)

Avoids

Solo or quiet company as a default frame

Cultural-experience-only framing

Cheap-feeling food and drink

Visits that feel like a long quiet study

What to offer

Small-group dinner (75% interest)

Wellness session (78% interested)

Evening / after-hours events with bar and food

Combined tickets that include food and drink

City-centre venue partnerships

Pricing + Channel

Standard visit £30. Premium evening £40-60.

Instagram + listings + evening city campaigns.

Explorers (26% of audience, 959,000 people)
Open to most things; highest-potential target audience

Wants

Variety: a bit of everything

Curated experiences: someone shows me the best bits

Things that make me think

Food and drink (48%)

Cause-led programming strongly net positive (+35).

Avoids

Going alone (events comfortable to attend alone 20%)

Visits with no clear shape

Pure-rest framings (only 19% find rest most lacking)

What to offer

Half-day skill session (92% interest - the highest of any segment)

Regular monthly meet-up (87%)

Wellness session (84%)

Multi-venue membership (45% would consider new)

Curated tours, expert-led access

Pricing

Standard visit £20-24. Up to £50 for premium where the product justifies it.

Reviews + email + listings. Less paid social.

Restorers (28% of audience, 1,047,000 people)
Hardest to engage; want to switch off; look for the familiar and the easy

Wants

Familiar over new (69% prefer familiar)

Switching off completely (79% prefer to learning new)

Relaxing, nothing too demanding (89%)

Close to home (87% prefer to longer journey)

Avoids

Buzzy or social-heavy framings

Most evening events

Skill, debate or wellness offers as headline

Membership pitched as 'visit more' (44% say 'I don't visit enough')

Cause-led as a headline (net +3, almost cancels).

What to offer

Pay-per-visit (don't lead with membership)

A trusted recommendation - the strongest driver

Crowd-free time windows

Cafe-led visits

Easy access, parking sorted

Pricing

Standard visit £20-22. Not interested in premium at any price.

Word-of-mouth, member-get-member, email to existing visitors, local press.

Purists (23% of audience, 841,000 people)
Want depth and substance; learning; price sensitive

Wants

Cultural experience over a meal (85% prefer)

Depth, focus on one thing (66%)

Solo or quiet company (88%)

To learn something new (66%)

Avoids

F&B central framings (15%)

Buzzy, social-heavy events

Things they perceive as cheap or shallow

Crowded times

What to offer

Half-day skill session (78%)

Evening debate (46%)

Expert-led tours, behind-the-scenes

Adult-focused times without school groups (23%)

Single-venue membership

Pricing

Standard visit £20. Most sensitive to overpricing - 67% off-put. Premium events up to £30, no more

Google + reviews. Single-venue membership messaging.

Breaking down the segments by region

London converts far better (52% visiting three or more times, against 35% in the devolved nations) and skews Sociable, the highest-spending, most premium-receptive segment. The premium-evening play has a natural home in city-centre venues. The rest of the country needs a different offer.

Region	Participants	Visited 3+ times in past year	Purists	Explorers	Restorers	Sociables
London	150	52%	21%	24%	20%	35%
South & East	395	42%	24%	23%	32%	22%
Midlands	195	43%	25%	23%	28%	25%
North	280	45%	23%	32%	26%	18%
Devolved Nations	166	35%	20%	29%	31%	20%

Source: analysis sample, n=1,186. Devolved Nations = Scotland, Wales, Northern Ireland combined.

What the table shows

London's segment mix is distinct: 35% Sociables against 18-25% elsewhere. The North has a higher Explorers concentration (32%). The South and East is the most Restorer-heavy region (32%).

What the differences mean

London visitors convert at a higher rate (52% visited 3+ times) than the devolved-nations average (35%), a 17-point spread. City-centre residents convert at 49% compared with 40-41% in suburbs, small towns and villages. The premium-evening play for Sociables maps most naturally onto city-centre venues.

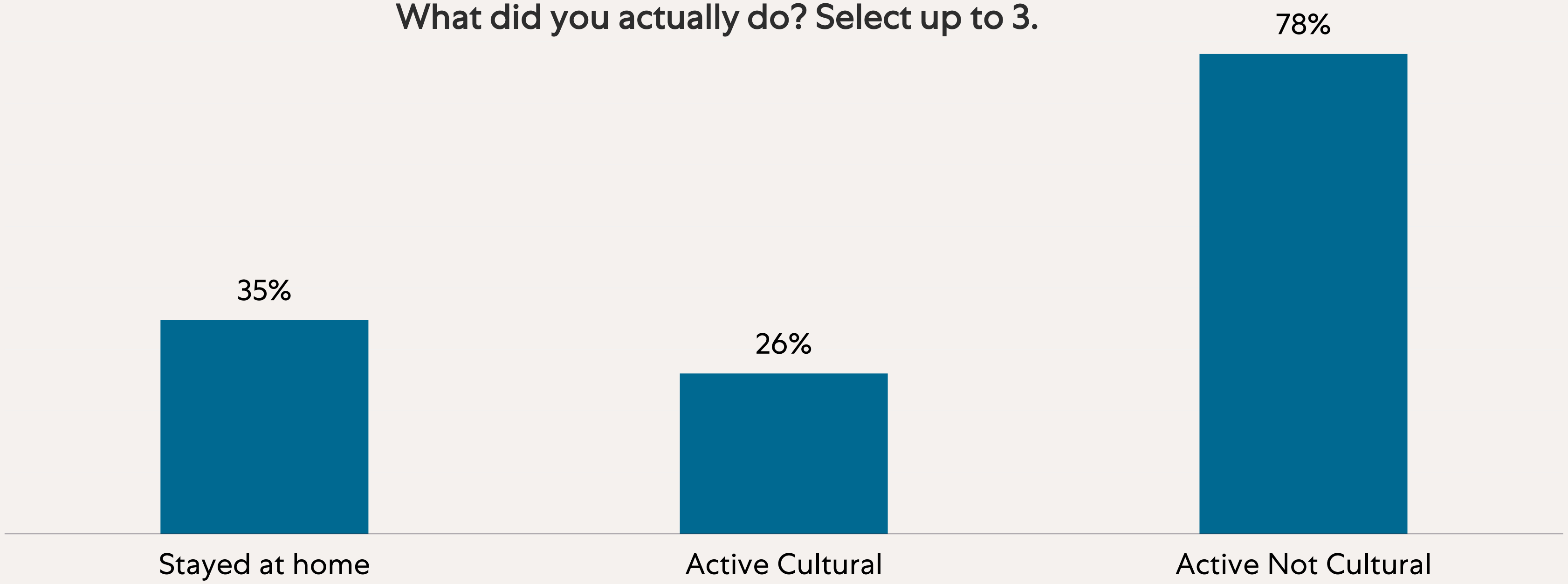
The competition isn't other visitor attractions; it's the sofa – or is it?

http://www.museudemontserrat.com/ca/coleccions/pinturamoderna/96/ramon-casas/507

Majority are active during the weekend

78% did something on their last free Saturday and only a third stayed home. 26% did something cultural. This audience is active. Most of what it does is free or low-cost, and cultural attractions are a small share of the total.

Think about the last Saturday you had completely to yourself, without work or other responsibilities. What did you actually do? Select up to 3.



Notes

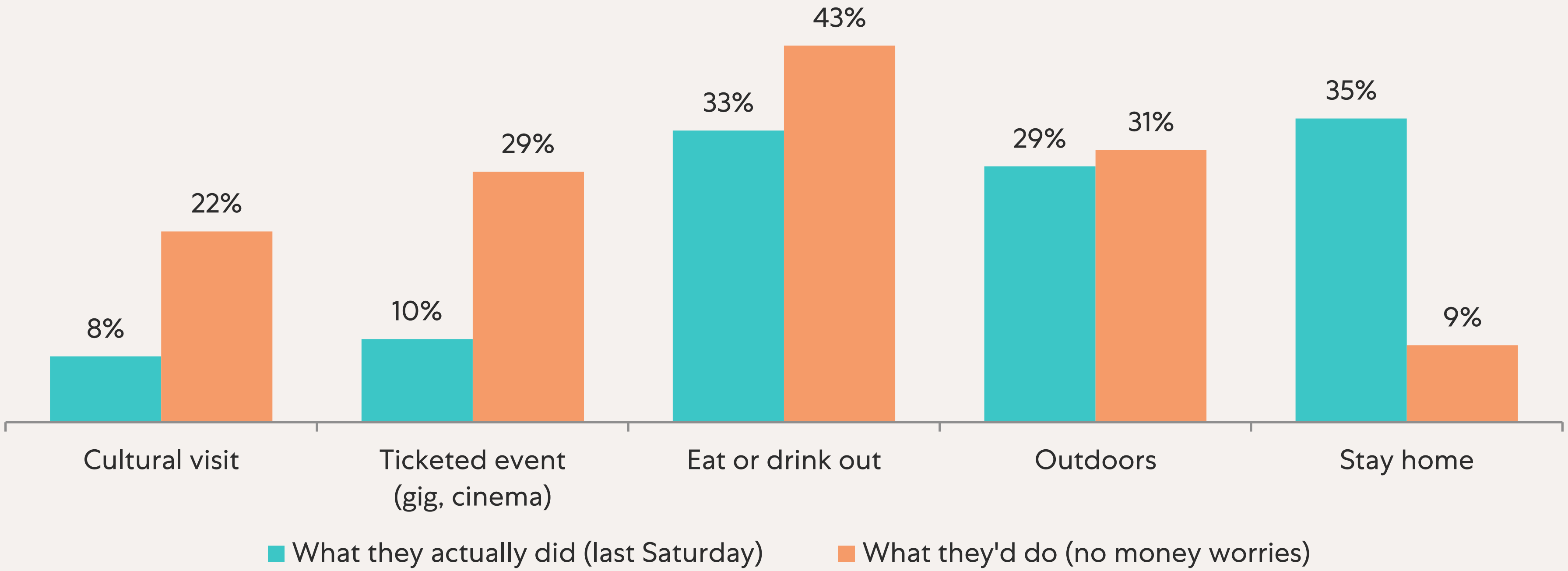
Active Cultural includes visiting museums and galleries, attending ticketed events like gigs and the cinema, and making and learning.

Active Not Cultural includes spending time outdoors, exercise, meeting up with friends and family, going out to eat or drink, browsing shops and markets, and wellness activities.

A version of this chart displaying all options is available in the appendix

With money no object, almost everything except outdoors rises

Asked what they would have done with no money worries, staying at home falls from 35% to 9% and cultural visits rise from 7.5% to 22%. Outdoor time is the one activity that does not move, at around 30%, because it is the only option that costs nothing. That makes outdoors the control. The distance every other activity travels between what people did and what they would have done is a measure of how far cost is holding it down. The fieldwork ran in the seventh-warmest April on record, which would raise the outdoor figure if anything, so good weather is not the reason the paid activities stayed low



Notes

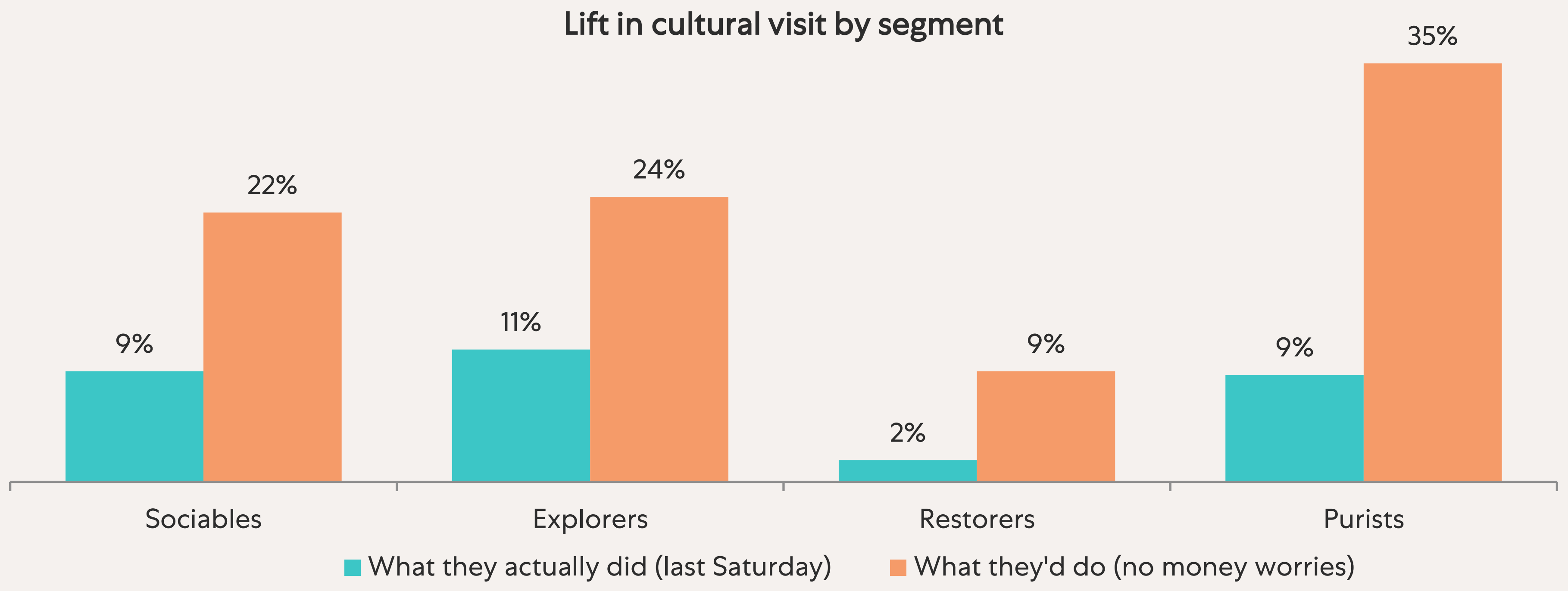
This chart compares responses to two different survey questions.

What they actually did: Think about the last Saturday you had completely to yourself, without work or other responsibilities. What did you actually do? Select up to 3.

What they'd do: Same Saturday, but with no money worries. What would you have liked to do? Select up to 3. Responses grouped.

The cultural-visit lift varies sharply by segment

When cost is removed, the largest rise in cultural visiting comes from Purists, over a third of whom would then make a cultural visit. Purists are the segment closest to the traditional cultural visit and also the most price-sensitive, so a rising ticket loses the most naturally cultural audience first.



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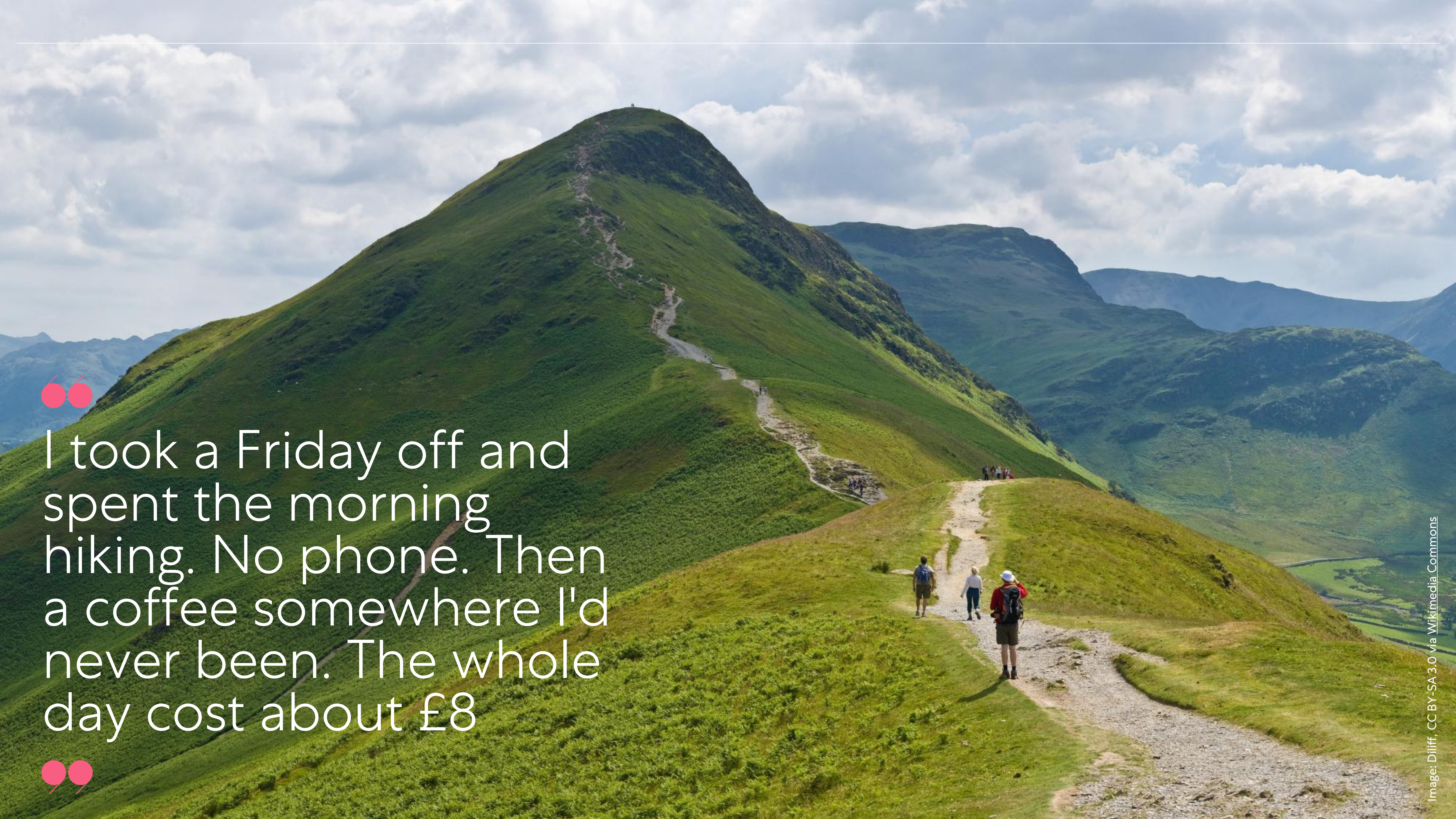


> I took a Friday off and spent the morning hiking. No phone. Then a coffee somewhere I'd never been. The whole day cost about £8

How to compete: the outdoors factor

The outdoors has particular appeal for this demographic, and it wins on two of their constraints at once: cost and rest. Leaning into the outdoor element of your offer engages them on their own terms. Competing with it means offering the connection or depth a walk cannot, at a price that does not make the walk the obvious choice.

“A walk. Free, breaks you out of the rut”

“Going for a walk along the river, pure escapism”

59%

have done an outdoor activity such as a hike or bike ride in the past few months

71%

Purists – the most culturally committed segment - have done an outdoor activity in the past few months

A third

Participants cited an outdoor activity when asked about a day out they’d particularly enjoyed recently.

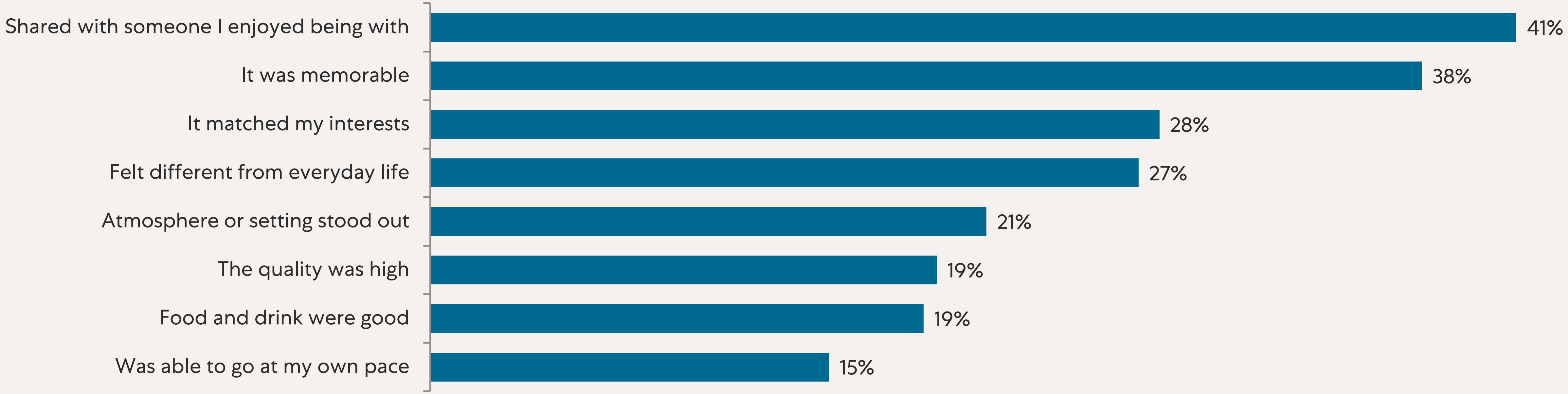
Survey question: Thinking of a day off that you particularly enjoyed, what did it involve (Open Text)

How to compete: sharing, novelty and restoration

Where leisure experiences can make a difference and show their value maps to the things lacking from participants' lives: connection and restoration.

This is the finding from slide 13 seen from the spending side. The visits people rate as worthwhile are the ones that gave them connection or restoration. It is the basis for the programming on slides 50 and 51

What made a recent paid leisure experience feel worthwhile? Select up to 3. Top 8 shown.



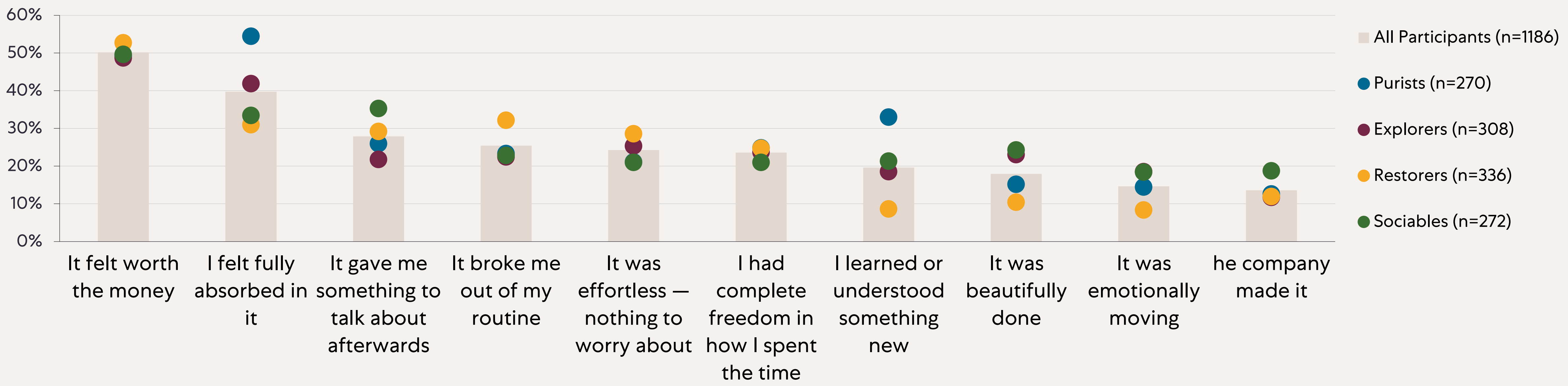
Survey question: What made that feel worthwhile? Select up to 3. This was preceded by the open text question: Please describe the last time you spent money on an experience that felt worthwhile to you.

A version of this chart displaying all options is available in the appendix

How to compete: value for money; segments differ

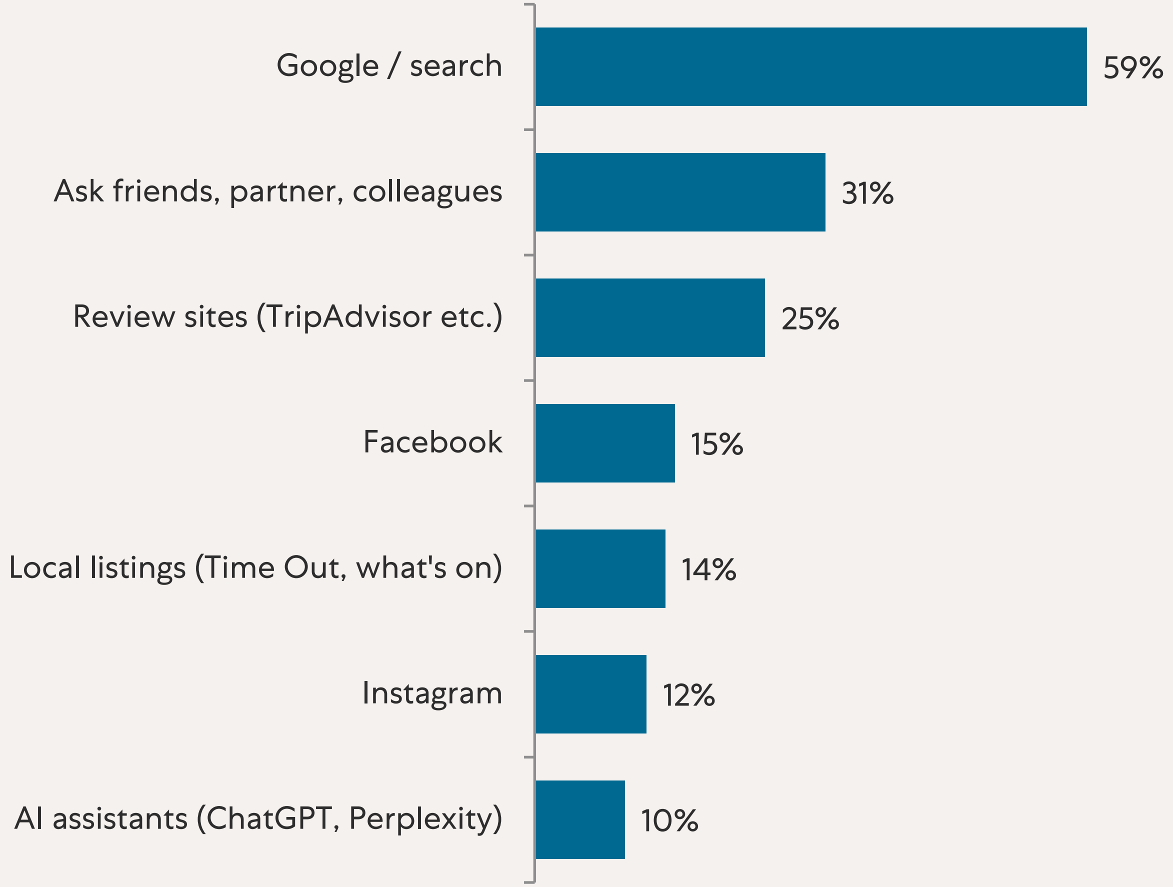
While value for money is the most critical element to get right when landing your experience, segments differ in terms of what tips a visit from acceptable to worth doing

When a leisure experience really lands for you, which of the following is usually true? Select up to 3.



Where to compete: word of mouth and Google lead

When you're looking for something to do - not a specific place, just an idea - where do you start? Select up to 3.



Be findable

Google + reviews + your own site. Price clarity, travel time, what's on.

Watch emerging trends

AI assistants are early but converter-skewed. Get your venue described well, with hours, prices, accessibility

Barriers and drivers: barriers are structural; drivers can be addressed more easily

Barriers & drivers

49-51% participants said that crowds and price are the largest barriers stopping them from going to visitor attractions.

The segments are relatively aligned in their responses with regards what stops them visiting.

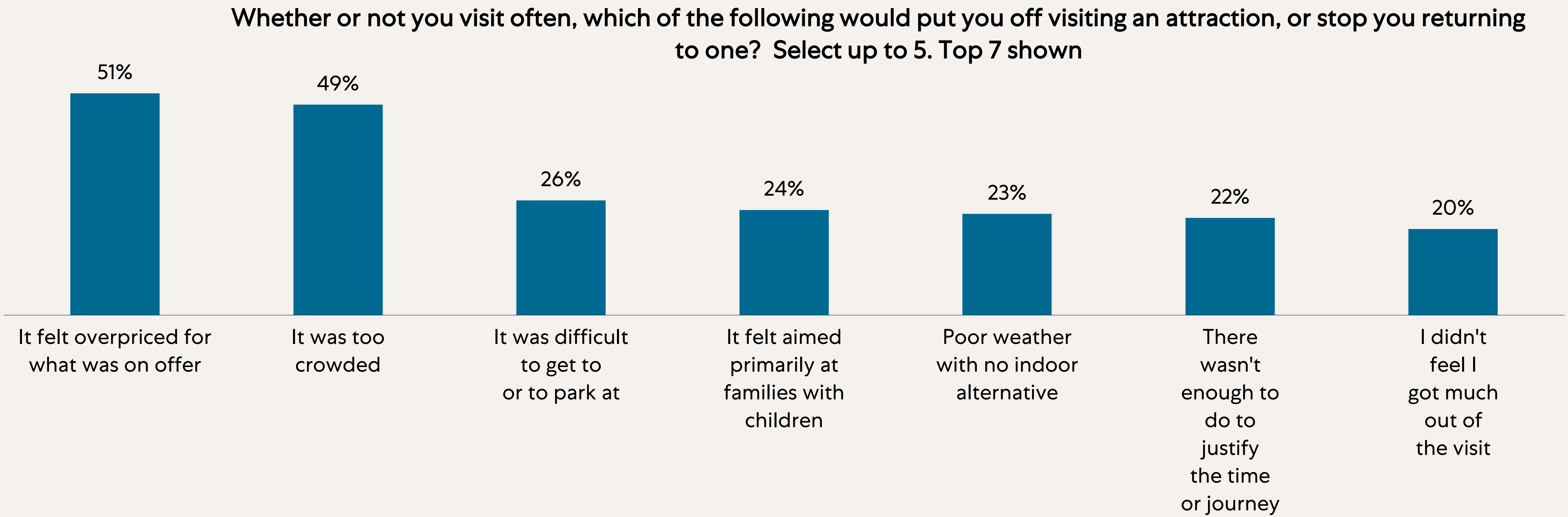
On the other hand, the drivers to visit are more scattered and segment-dependent. While transport and recommendations are both important drivers to visit, the Sociable segment is highly motivated by good food and drink, while the Purists are the most motivated by additional programming.

In terms of ticketing and membership products, 25% said a combined ticket including food and drink would be a motivator to visit more, while 18% chose membership that worked across multiple sites.

Price and crowds cannot be removed with programming. The job of programming is to raise the value that justifies the price, segment by segment.

Price and crowds the biggest barriers to attendance.

Purists in particular are the most sensitive to price and crowds, with 67% selecting price and 60% selecting crowding.

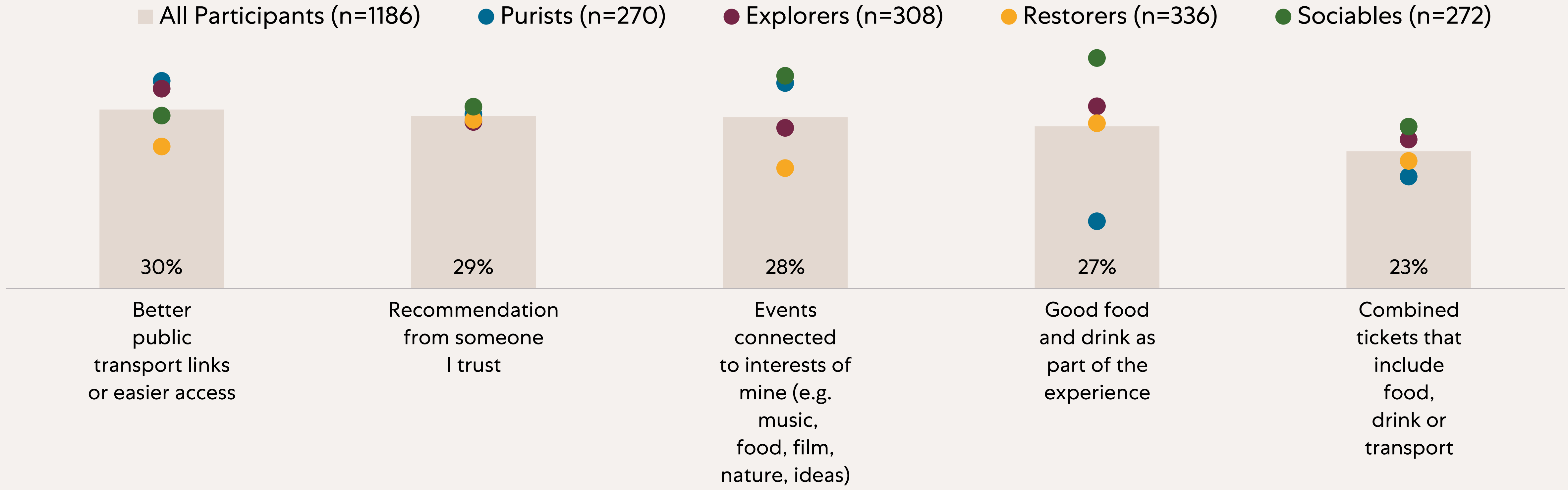


A version of this chart displaying all options is available in the appendix

Segments split on food and drink as a driver.

Recommendations universally popular as a driver; while other drivers are split by segment. Food and drink in particular highlights the difference between Sociables and Purists.

What would make you more likely to visit a visitor attraction, or visit more often? Select up to 5; top 5 shown



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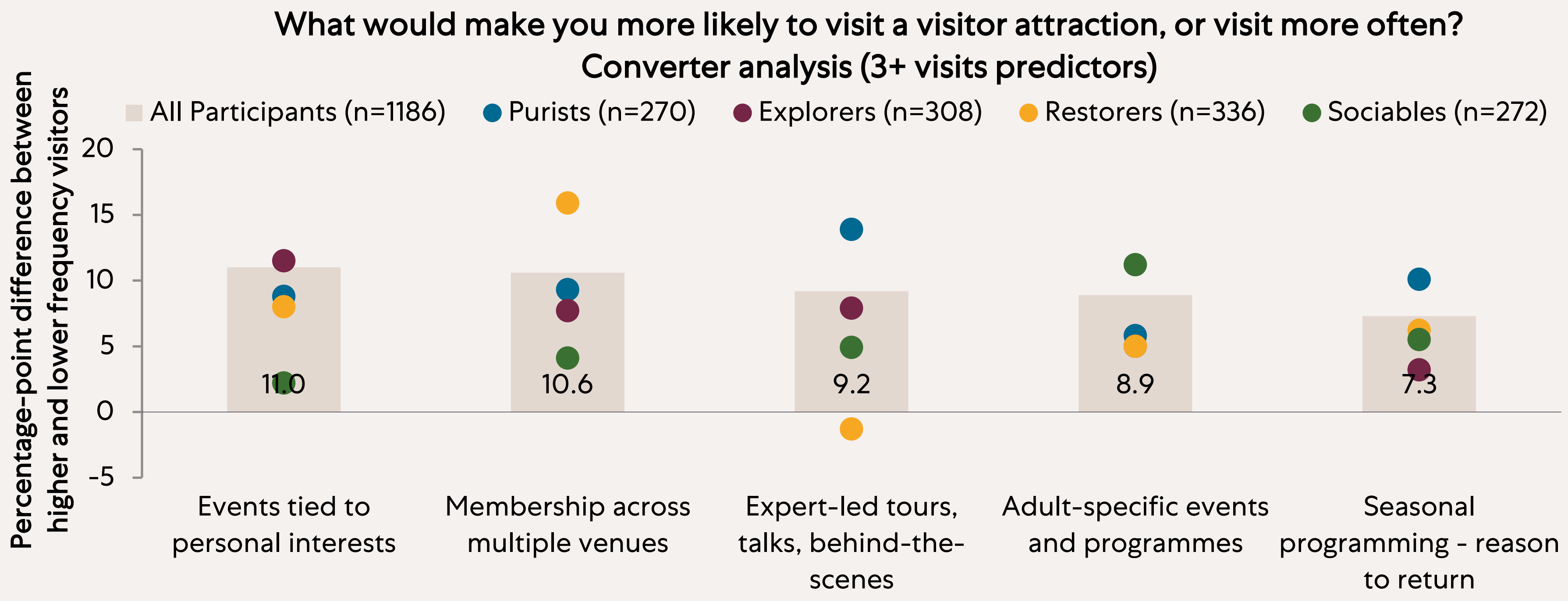
Stated drivers and conversion drivers compared

The drivers people name (transport, food, price clarity) barely separate frequent from infrequent visitors. The drivers that do are membership, adult events, seasonal programming and expert-led access. What people ask for and what predicts frequency are different lists.



Interpretation

This chart compares stated drivers between higher-frequency visitors (3+ visits in the past year) and lower-frequency visitors (0-2 visits).

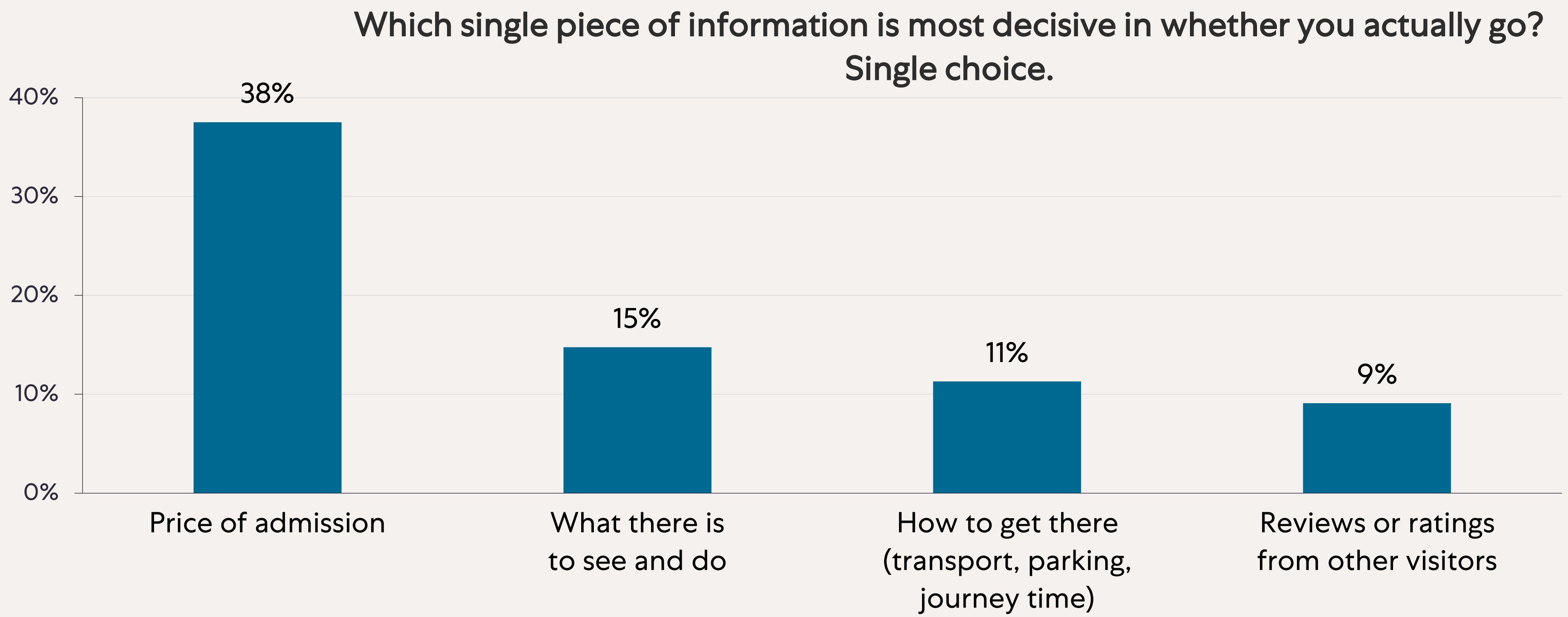
The figures show the percentage-point difference between the two groups in selecting each driver. For example, +11.0 on 'events tied to personal interests' means 34% of higher-frequency visitors selected it versus 23% of lower-frequency visitors, a gap of 11 percentage points.

A negative figure (for example expert-led tours among Restorers) means the higher-frequency group selected it less often than the lower-frequency group.

To see the figures behind this chart, see the appendix

Price is the single most decisive piece of information

Segments are aligned in their responses to what is the most decisive piece of information for them: price. This audience is also outside the sector's usual discounts: too old for a child ticket, too young for concessions, so they meet admission at full price.



Options receiving less than 5% responses

Whether it's likely to be crowded or quiet

Food and drink options and quality

Price of any extras

Accessibility informationHow long a visit typically takes

Photos or video of the venue

What's currently on (temporary exhibitions, seasonal programming)

Whether I can book a specific time or need to queue

Whether it's suitable and enjoyable for adults without children

The venue's social media

Cancellation or flexibility policy

Cost is very important. The cost of going to some attractions is excessive. When tickets for 2 people come to £60 plus, and food and drink can cost another £60 plus. I see more value in spending £120 on a lovely meal and drinks.

If you could change one thing about how visitor attractions work for adults in your life stage, what would it be?

Perceptions & belonging

Families aren’t as off-putting as we’d assumed

24% participants said that they’d been put off by venues that appeared more aimed at children.

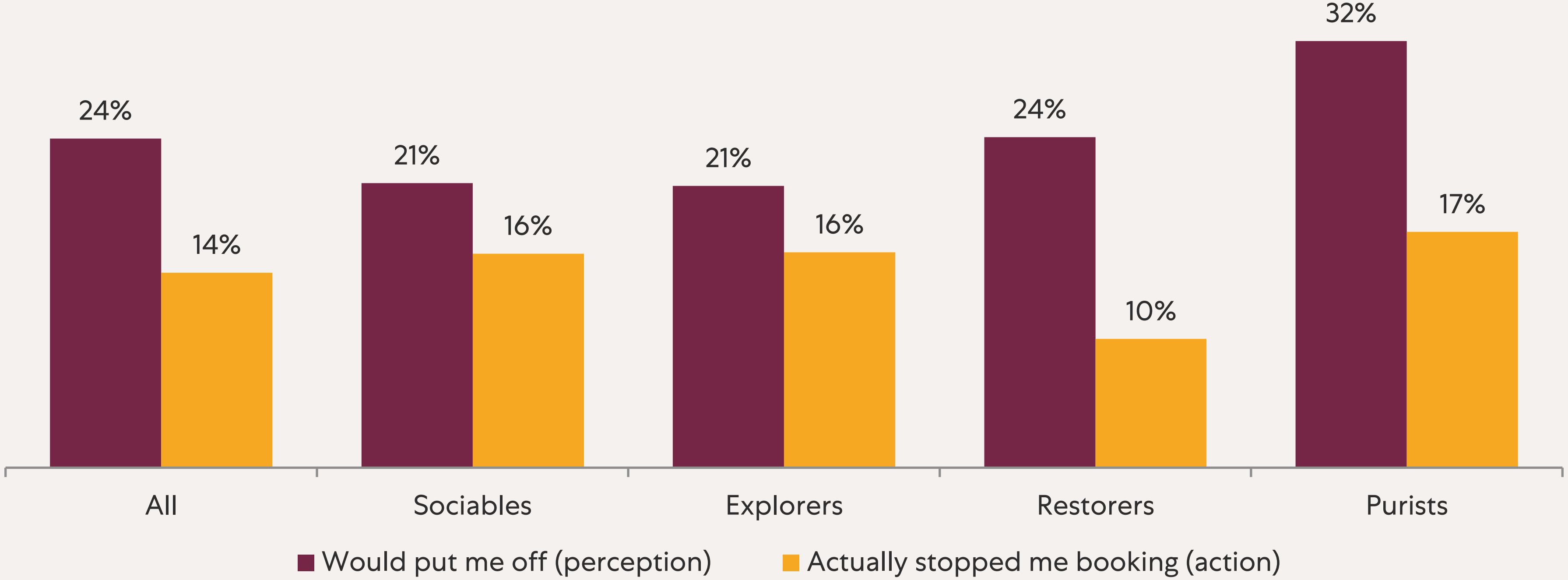
This barrier was much lower than broader issues like price and crowds; aligning more with transport or poor weather as reasons not to attend. When it comes to making a decision, attractions being aimed at children is less of a barrier to purchase than the idea of it in the first place.

In terms of drivers for attendance, events we tested that were designed specifically for adults had appeal, but not as strongly as other drivers such as transport, food and drink and personal recommendations.

That said, family crowds can be a source of potential unease for adult-only visitors, with 9% of all participants having felt unwelcome or out of place at a visitor attraction, citing attractions being aimed at families or children as the reason.

The perception-behaviour gap is roughly 10 points

Comparing what they would do, with what they've actually done reveals that communicating what elements of your offer are for adults will support delivering conversion.



Notes

This chart compares responses to two different survey questions.

Would put me off: Whether or not you visit often, which of the following would put you off visiting an attraction, or stop you returning to one? Response: 'It felt aimed primarily at families with children'.

Actually stopped me booking: When you have considered visiting somewhere but not gone through with it, which of the following applied? Response: 'It appeared to be aimed primarily at families'

> If I feel a place is more for families, I feel uncomfortable & perhaps judged for not having any children.

Photo by Ian Schneider on Unsplash

Have you ever felt unwelcome or out of place at a visitor attraction?

27% “Not specifically, but out of place“

Broad and spread fairly evenly. Mostly the family-feel effect - adults without children noticing the venue is pitched at families.

Addressable through comms: tone on the page, photography, 'this is for adults too', off-peak signposting.

20% "Yes, I have felt unwelcome“

Highest among 2 demographic groups:

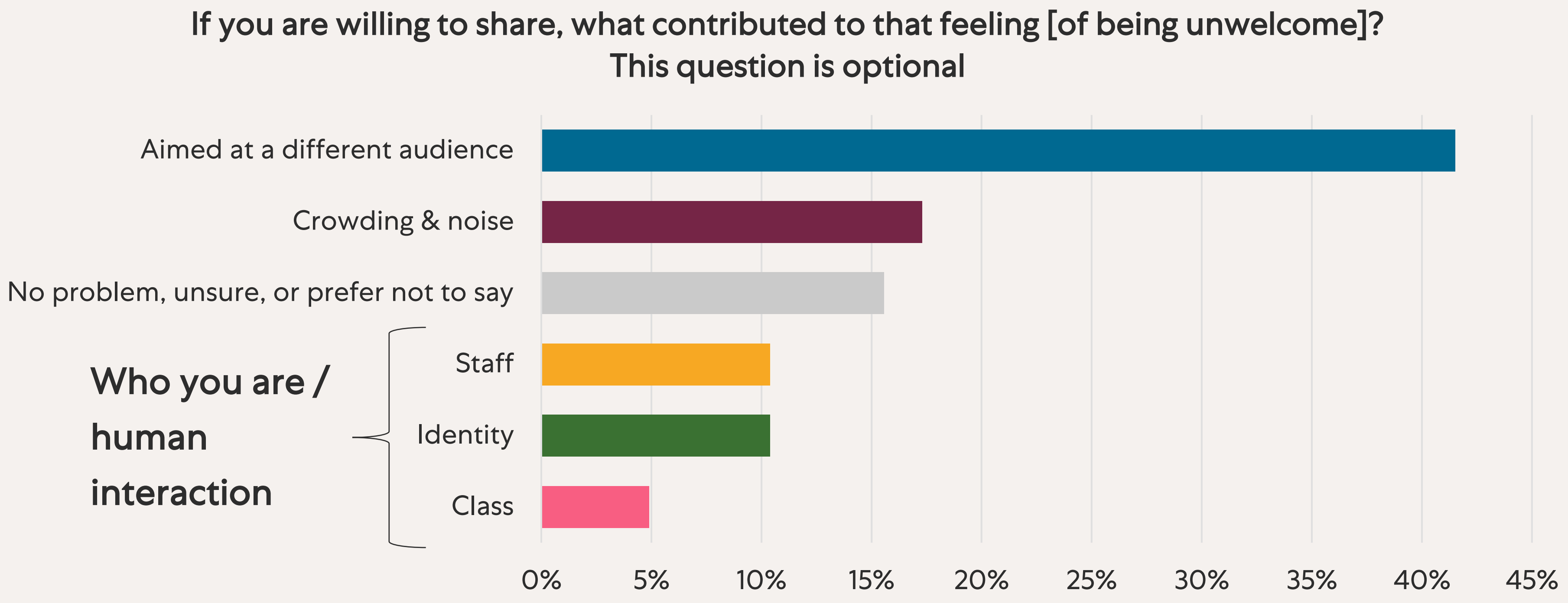
- Neurodivergent: 1.9× more likely (35% vs 19%)
- Global majority: 1.5× more likely (29% vs 19%)

Structural change required: training, culture, recruitment and visible representation

Base sizes: neurodivergent n=162; global majority n=128. Effects are statistically significant in univariate cross-tabs and bootstrap-robust, but directional, and we recommend a boost sample on these groups before drawing organisation-level conclusions.

A quarter of the 'why' is about who you are

26% of those who left a comment (352 responses) refer to human interaction: rude staff, or feeling different because of who they are or how they present.



Staff:

Staff were disengaged and seemed to view us as an unwanted distraction

Identity:

Being looked down because of race.

being single - you stand out a lot

Class:

It was very posh

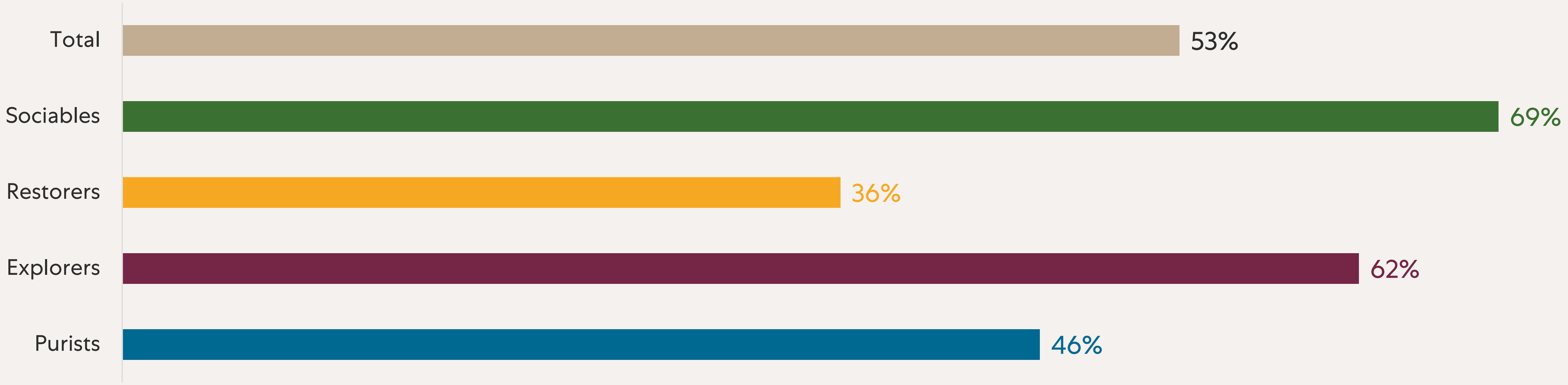
I didn't feel cultured enough

Note: This question followed: 'Have you ever felt unwelcome or out of place at a visitor attraction?' Only shows respondents who responded with: Not specifically, but I have felt out of place or not the intended audience, Yes, more than once, or Yes, once, were asked to give comment. 352 responses were received.

Importance of welcoming diverse communities

Visible diversity work is a positive lever for the most engaged segments and a near-neutral one for the rest. Worth doing for the audience overall, with the segment composition of any individual venue in mind.

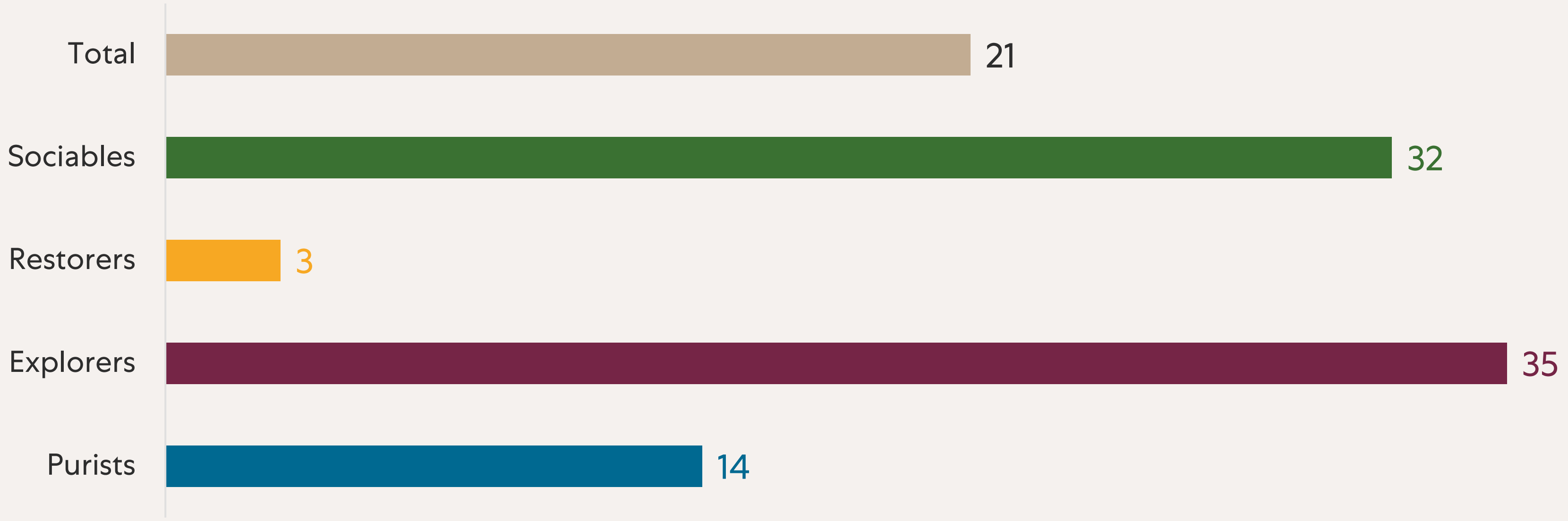
How important is it to you that a visitor attraction actively demonstrates it welcomes diverse communities? (% Selecting Very + Quite Important)



LGBTQ+ programming delivers a +21 net, but it varies by segment

The strongest gains with LGBTQ+ programming are in the two most engaged segments: Sociables and Explorers. Restorers end up with a near neutral score: their positive share almost matching their negative share.

If a visitor attraction hosted a dedicated LGBTQ+ event, Pride partnership or community evening, how would that affect your view of the venue? (Net score)



Notes

This charts shows the net response to this question, with the net score showing the % positive responses (“More likely to visit” and “Would think positively about it, but it wouldn’t make me more likely to visit”) minus the % negative responses (“Less likely to visit”).

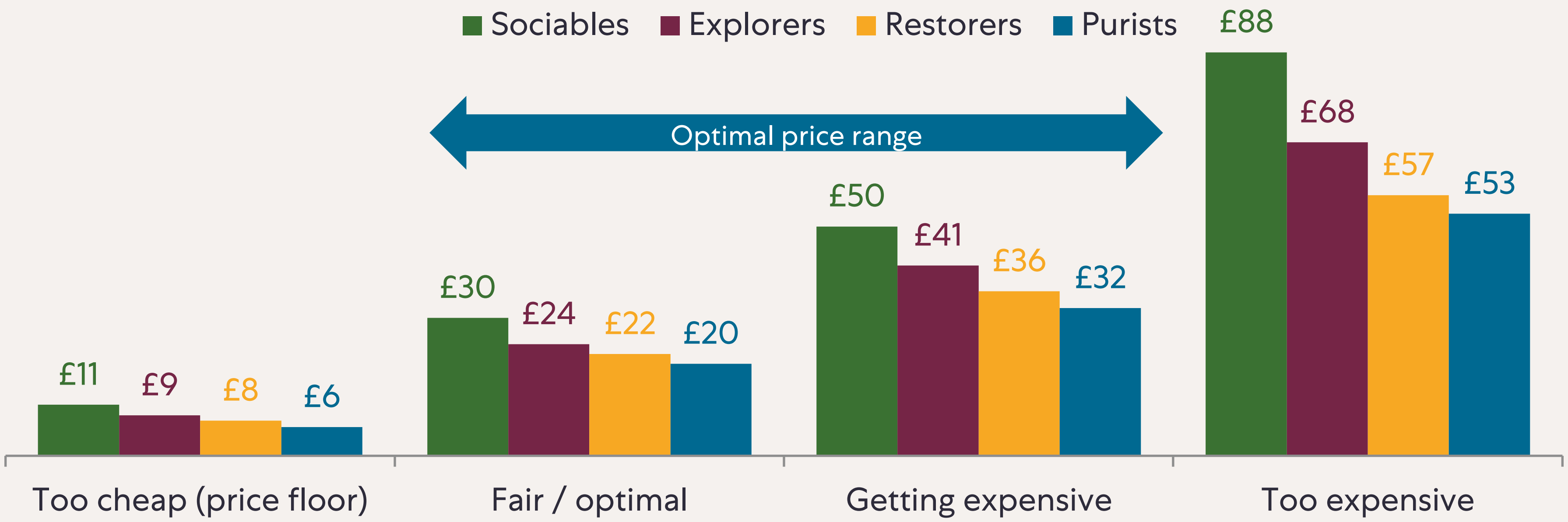
For underlying figures, see the appendix

Pricing and programming

Photo by Annie Spratt on Unsplash

Roughly £25-£40 is where you need to pitch entry

Testing acceptable price ranges for a standard daytime visit to a visitor attraction revealed differences across segments, but a broad bracket of £25-£40 for basic entry.



Survey question wording: Too cheap: And at what price would this start to seem suspiciously cheap — so low you'd wonder whether it was worth visiting? Fair / optimal: For a standard daytime visit to a visitor attraction (no additional experiences), what do you consider a fair price for one adult? Getting expensive: At what price would you start to think: 'this had better be really special'? Too expensive: And at what price would you simply not bother, regardless of how good it sounded?

Notes

Purists are the most price-sensitive, with a range of £20-£32, while Sociables can extend up to £50 for an entry ticket for something special.

Off-peak and evening demand is real

7.5%

of free Saturdays included a cultural visit

The weekend leisure slot is crowded. Outdoor activities, eating out and staying home account for most of it.

20%

want adult-focused times without school groups

A weekday-daytime signal, highest in Purists (23%) and Explorers (21%). A Tuesday or Wednesday morning adults' slot is a tested pocket of demand.

13%

would attend evening or after-hours openings

Rises to 17% among Sociables, who match this with the highest willingness to pay for premium evening events.

Two demand opportunities stand out:

A weekday-daytime adults' slot reaches around a fifth of the audience and is the largest within Purists and Explorers.

An evening or after-hours opening reaches around an eighth of the audience but with a higher willingness to pay among Sociables, where the premium tier sits.

Testing different add-on types

What we tested

We tested a range of different types of events that could be presented in addition to a visitor attraction's main offering.

Participant interest was gauged based on whether they had attended something similar previously, and whether they expressed an interest in attending something similar in the future

The activities

- A half-day session, led by a specialist, in which you learn a **specific skill**.
- An **after-hours wellness session** using the venue's outdoor setting.
- A **ticketed dinner** for a small group of people who do not know each other, held in a historic room.
- A regular **monthly session** at the same venue with the same small group of people.
- A structured **evening debate** on a thought-provoking question, drawing on the venue's collection, landscape or history.

Interest was high

69% participants were interested in doing something like this, rising to 92% for the Explorer segment.

The stand-out event was "A half-day session, led by a specialist, in which you learn a specific skill."

Which product to put media behind for which segment

Different events had a range of appeal across the sample, with differences between segments for particular types of events. Skills workshops had universal appeal, and an optimal price of £25.

	Skills workshop	Wellness session	Small-group dinner	Monthly meet-up	Evening debate
Total interest	69%	58%	50%	55%	49%
Optimal price	£25	£20	£50	£15	£20
Lead segment	Explorers (92%)	Explorers (84%)	Sociables (75%)	Explorers (87%)	Explorers (73%)
Who to put media behind	All segments including lapsed	Explorers + Sociables	Sociables only	Explorers + Sociables	Explorers + Purists

Went to a create your own pottery session with friends. We chatted and created something useful and unique to each of us

Please describe the last time you spent money on an experience that felt worthwhile to you.

Lessons

Six things to reckon with

1 Targeting

Plan creative variants as opposed to universal campaigns: dedicated messaging for this group is helpful; as is leaning into segment preferences.

2 Cost is the most decisive factor

Getting your price, and your sense of value for money, right is a decisive factor for this group – typically ineligible for any form of targeted discounts (family/over 65s discounts etc.).

3 Provide info

The top-of-list drivers people cite (transport, food, price) are best handled as hygiene factors that the website needs to answer clearly.

4 Belonging split

Clearly communicating your appeal to this audience – and delivering on it – will help break barriers and feelings of being out of place.

Additional training and visible representation is important to address.

5 Each fix has a cost elsewhere

Cause-led programming, premium tiering and adult-only times each have a segment trade-off. Make the call on purpose, with your audience mix in mind.

6 Drive frequency smartly

Build campaigns around what separates higher-frequency from lower-frequency visitors: expert-led sessions, adult-specific events, multi-venue membership, seasonal programming.

4 areas to deliver on to make a visit feel worth it

We asked participants what made their last enjoyable day out feel worth it; their answers give an insight into what to lean into to improve word of mouth.

Connection (42%)

"Shared it with someone I enjoyed being with"
Lead with the shared moment; days you remember together.
Comms featuring social imagery: friends or partner.

Novelty (27%)

"Different from everyday life"
Lead with the break-from-routine.
Be specific: an unfamiliar room, a moment of surprise.
Avoid generic discover something new framing

Absorption (40%)

"Fully absorbed in it"
Lead with the time-disappears feeling.
Long, slow, deep visits
Don't pitch brevity (people that want a shorter visit are less likely to convert anyway).

Memorable (37%)

"Something to talk about afterwards"
Lead with the take-home moment - what they'll tell someone at work on Monday, or share on socials.

BAKERRICHARDS

Thank you

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Image: Leeds Castle

Methodology and references


Image: Cutty Sark

References and notes

- Page 9: ONS, 2022-based household projections, England: households without dependent children
- Page 9: ONS population estimates, adults aged 35 to 54 in England and Wales: 6.37m of 14.93m have no dependent children
- Page 9: AVLA visits: publicly available and tracked year on year
- Page 9: high-street footfall https://repository.mmu.ac.uk/articles/report/Review_of_High_Street_Footfall_in_England_2023/32551335?file=65214312
- Page 9: CPI http://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/d7bt/mm23
- Page 16: ONS population estimates, adults aged 35 to 54 in England and Wales: 6.37m of 14.93m have no dependent children
- Survey question wording is shown on each relevant chart page; the source data is the Baker Richards survey described in the Methodology.
- Image credits: National Trust, Fountains Abbey and Studley Royal Water Gardens (cover); Leeds Castle (closing); further images via Unsplash and Wikimedia Commons, credited in place.

Demographics (1/4)

Which of these best describes your living situation? NB, contributors could select more than one option	% (n=1,186)
Live with a partner	44%
Live alone	35%
Live with adult children at home	14%
Live with parents at home	10%
Live with other family members	5%
Live with friends or housemates	4%
Live in supported or assisted accommodation	0%
Other (please describe if you wish)	0%
Prefer not to say	0%

Which of these best describes your current work situation?	% (n=1,186)
Employed (full-time)	56%
Employed (part-time)	12%
Self-employed or freelance	9%
Looking after home or family	4%
Student (in full-time education or an apprenticeship)	0%
Unemployed (seeking work)	6%
Not currently able to work (for example, due to a long-term health condition, impairment or caring responsibilities)	11%
Retired	1%
Other (please describe if you wish):	1%
Prefer not to say	1%
(Chose not to answer)	0%

What kind of work is done by the main income earner in your household?	% (n=1,186)
Senior managers or professionals	9%
Middle managers or professionals	23%
Junior managers, administrators, or supervisory roles	28%
Service, sales, and support roles	16%
Skilled trades and technical roles	14%
Never worked in a paid job	3%
Prefer not to say	6%
(Chose not to answer)	1%

Demographics (2/4)

What is your household's total annual income before tax?	% (n=1,186)
£100,000 or above	7%
£75,000 to £99,999	8%
£50,000 to £74,999	17%
£40,000 to £49,999	10%
£30,000 to £39,999	15%
£20,000 to £29,999	18%
£10,000 to £19,999	13%
Below £10,000	7%
I'm not sure	1%
Prefer not to say	4%
(Chose not to answer)	0%

What is the highest level of qualification you have achieved?	% (n=1,186)
Postgraduate degree (e.g. MA, PhD, PGCE)	13%
Undergraduate degree (e.g. BA, BSc)	26%
Higher vocational qualifications (NVQ Level 4–5, HNC, HND, Foundation Degree)	10%
A Levels, Highers or equivalent	17%
5 or more GCSEs at Grade C/4 or above, or equivalent	11%
1 to 4 GCSEs at Grade C/4 or above, or equivalent	12%
Professional qualifications (e.g. teaching, nursing, accountancy)	2%
Apprenticeship	3%
Other vocational or work-related qualifications	2%
No formal qualifications	3%
Qualifications obtained mainly outside the UK	0%
Prefer not to say	1%
(Chose not to answer)	0%

How do you describe your gender?	% (n=1,186)
Woman	57%
Man	42%
Non-binary	0%
I use a different term	0%
Prefer not to say	0%
(Chose not to answer)	0%

Demographics (3/4)

How would you describe your sexual orientation?	% (n=1,186)
Straight / Heterosexual	85%
Gay or Lesbian	6%
Bisexual	5%
Queer	1%
Asexual	1%
I prefer to self-describe (please specify)	0%
Prefer not to say	2%
(Chose not to answer)	0%

Do you identify as D/deaf, Disabled, or to have a long-term physical or mental health condition or illness lasting (or expected to last) 12 months or more?	% (n=1,186)
Yes	22%
No	75%
Prefer not to say	2%
(Chose not to answer)	0%

Do you identify as neurodivergent? This could include conditions such as Autism, Dyslexia, ADHD.	% (n=1,186)
Yes	14%
No	84%
Prefer not to say	2%
(Chose not to answer)	0%

Demographics (4/4)

How do you describe your ethnic background?	% (n=1,186)
White	88%
Asian or Asian British	4%
Black, Black British, African or Caribbean	4%
Mixed or multiple ethnic groups	2%
Another ethnic group	0%
Prefer not to say	1%
(Chose not to answer)	0%

Do you have caring responsibilities for any adults (for example, older adults, partners, disabled relatives, friends or neighbours)?	% (n=1,186
Yes - regular caring (daily or weekly)	9%
Yes - occasional caring (as needed)	12%
No	79%
Prefer not to say	1%

Caring responsibilities changes what they need from the visit

21% have some adult-caring role

- 9% regular (daily or weekly)
- 12% occasional (as needed)

Visit rates are nearly identical to non-carers, requirements are not

What they want more of

Comfort & flexibility

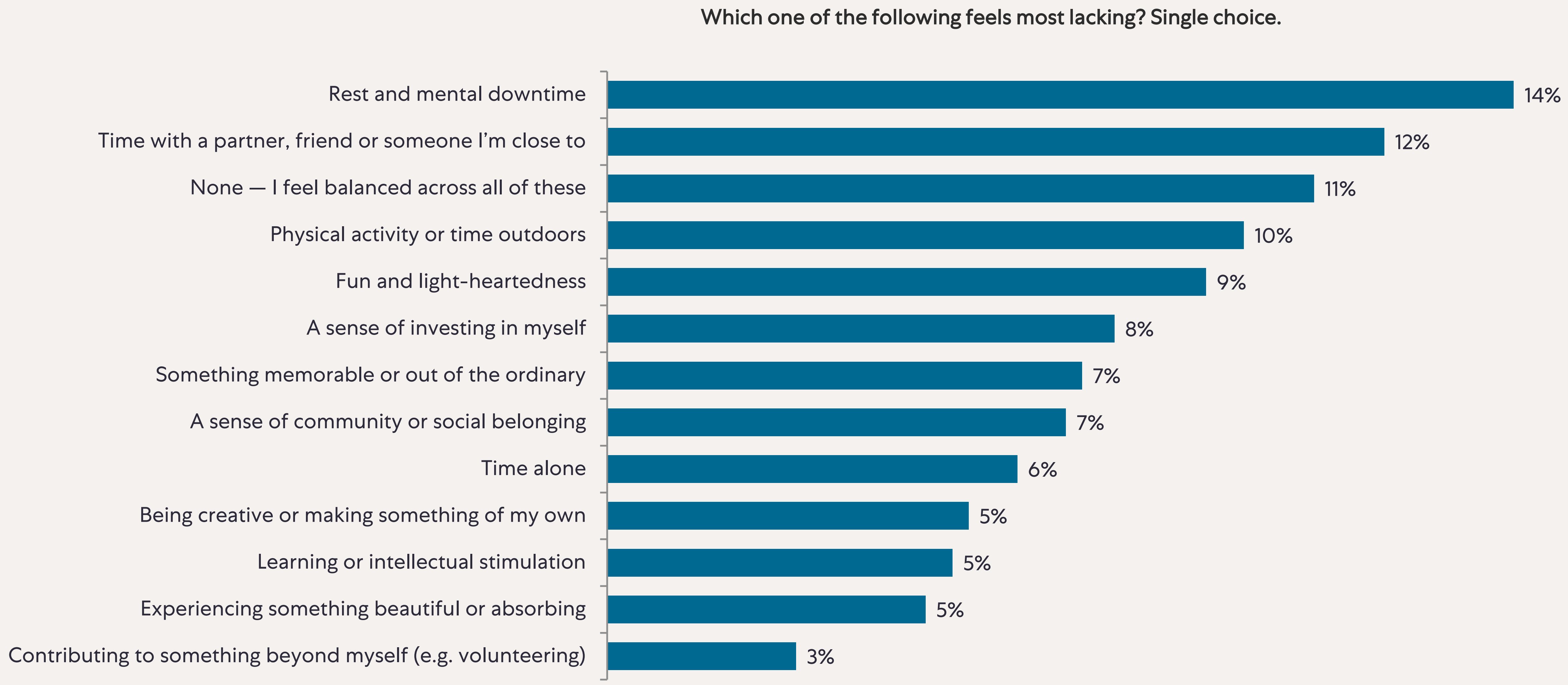
- Somewhere comfortable to sit or take a break (+6 pts)
- Social or community events at the venue (+8 pts)
- Trusted recommendation from someone they know (+7 pts)
- A shorter, focused visit option (+6 pts)

Friction that costs them more

Booking & information

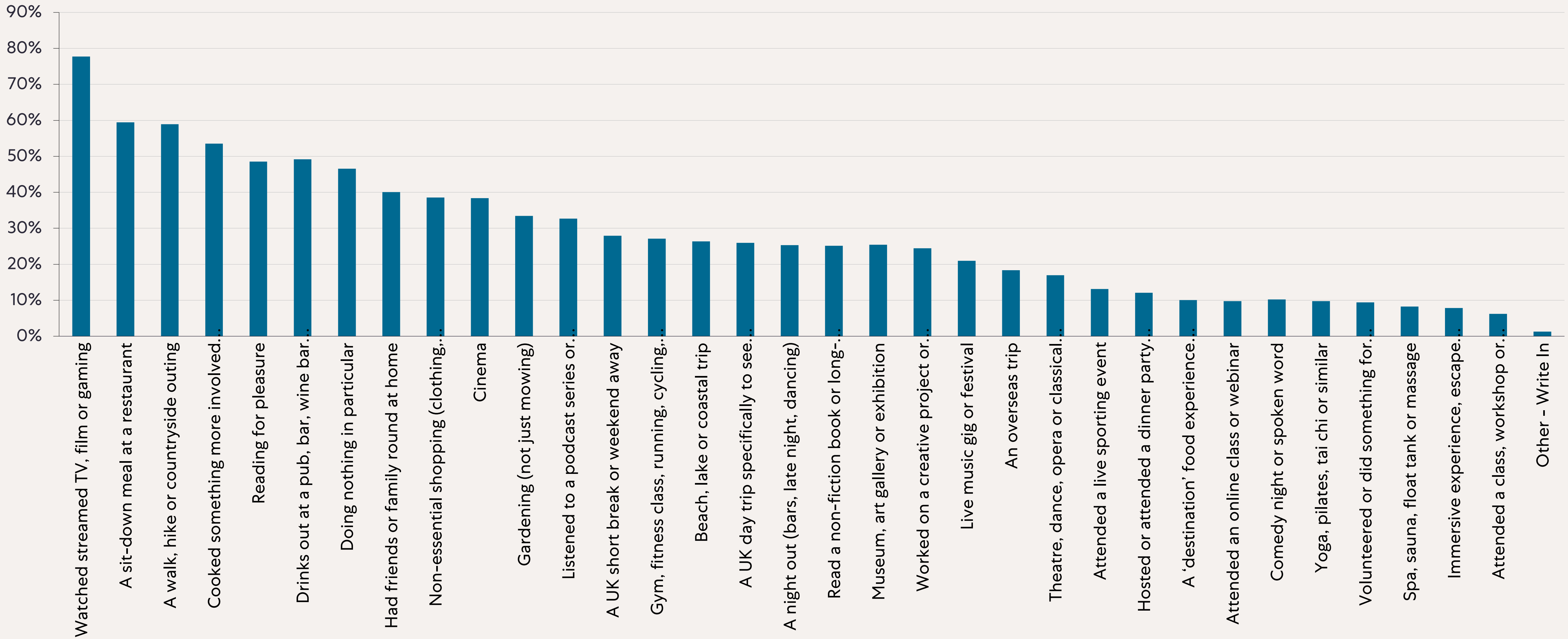
- Website was difficult to use (+7 pts)
- Booking process felt too involved (+5 pts)
- Couldn't find enough detail before deciding
- Tight planning window means low friction matters most

Which one of the following feels most lacking?



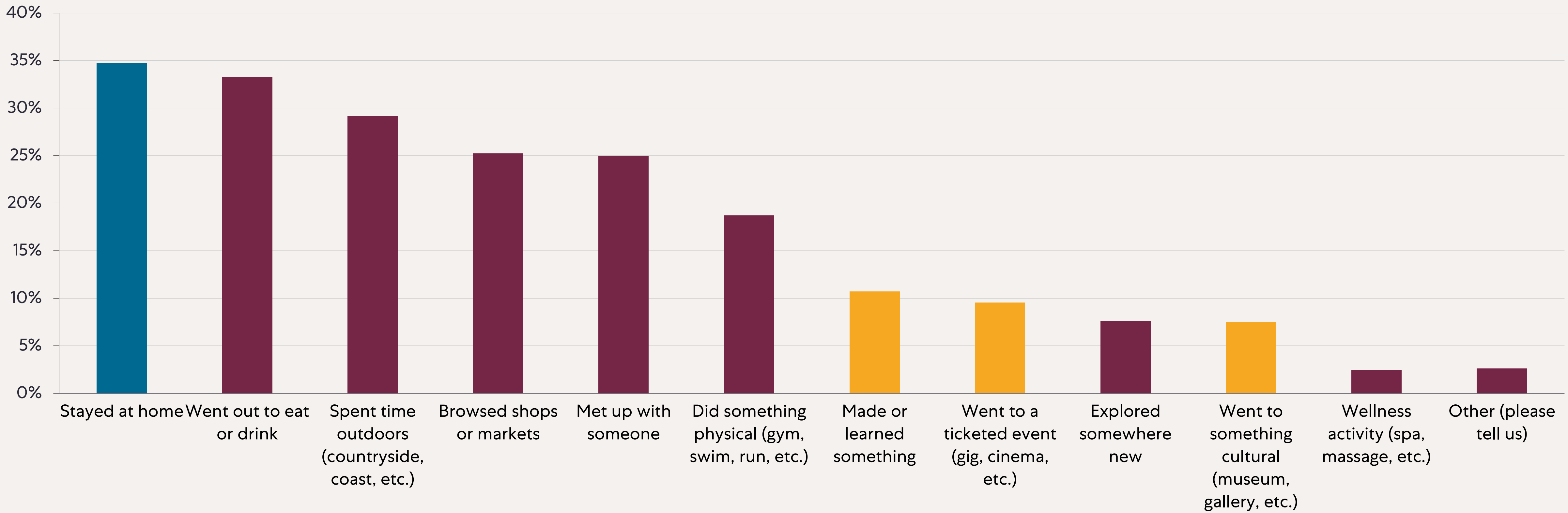
In the last few months, which of the following …

In the last few months, which of the following have you done in your free time? Select everything that applies.



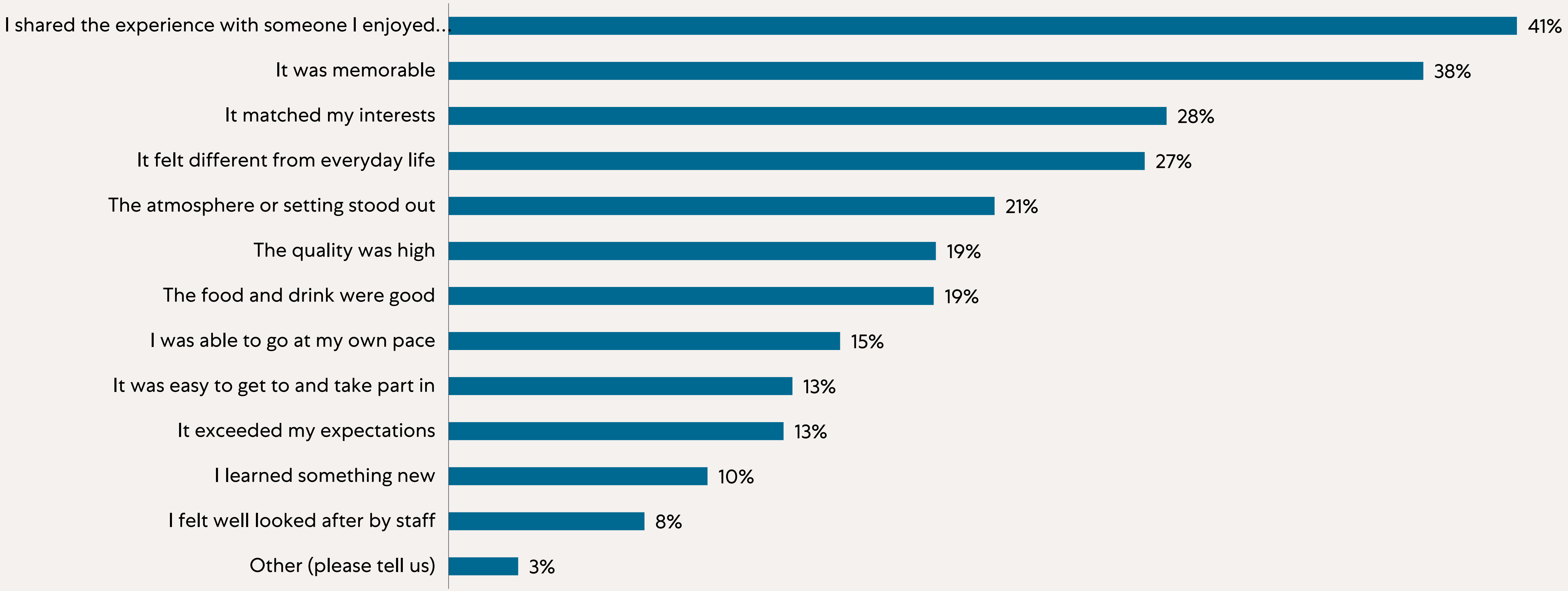
Your last free Saturday

Think about the last Saturday you had completely to yourself, without work or other responsibilities. What did you actually do? Select up to 3.



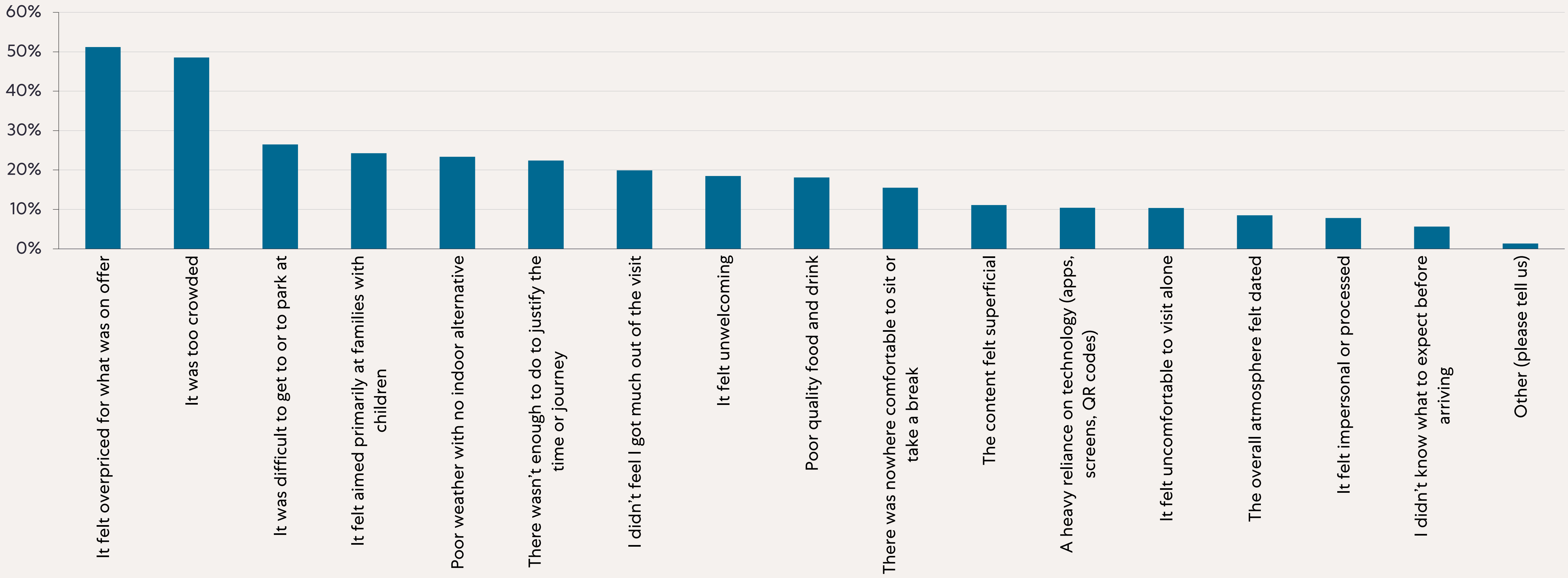
What made a recent paid leisure experience feel...

What made a recent paid leisure experience feel worthwhile? Select up to 3.

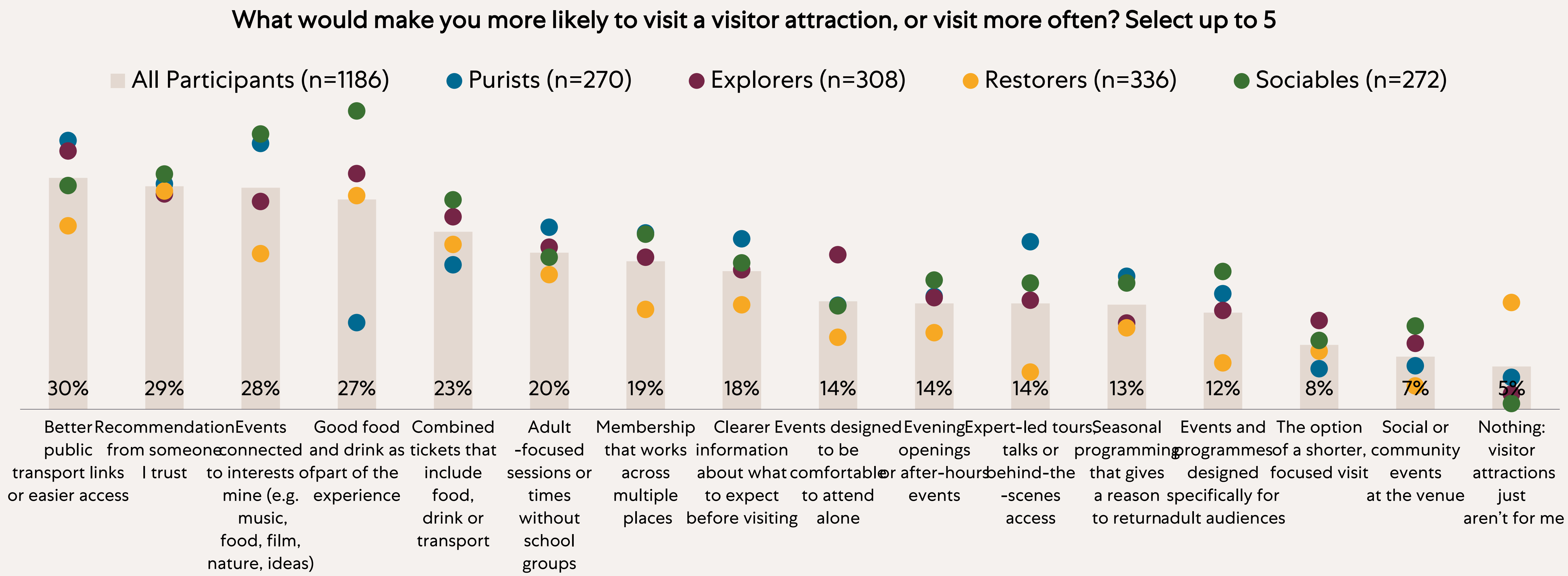


Whether or not you visit often, which of the …

Whether or not you visit often, which of the following would put you off visiting an attraction, or stop you returning to one? Select up to 5.



What would make you more likely to visit a visitor…



What converts varies sharply by segment

Multi-site membership and events programming are disproportionately appealing to already-frequent visitors.

Driver	All	Purists	Explorers	Restorers	Sociables	Odds ratio (all)
Expert-led tours, talks, behind-the-scenes	+9.2	+13.9	+7.9	-1.3	+4.9	2.22×
Adult-specific events and programmes	+8.9	+5.8	+5.0	+5.0	+11.2	2.28×
Membership across multiple venues	+10.6	+9.3	+7.7	+15.9	+4.1	1.99×
Events tied to personal interests	+11.0	+8.8	+11.5	+8.0	+2.2	1.72×
Seasonal programming - reason to return	+7.3	+10.1	+3.2	+6.2	+5.5	1.93×

Interpretation

This shows the percentage-point difference between higher-frequency (3+ visits a year) and lower-frequency (0-2 visits), by segment, plus univariate odds ratio. n=1,124.

A positive figure means higher-frequency visitors in that segment selected this driver more often than lower-frequency visitors did.

Bases: All n=1,124 (512 higher-frequency / 612 lower-frequency). C 140/113. E 128/169. R 73/239. S 171/91.

LGBTQ+ programming delivers a +21 net across the audience, but it varies by segment

LGBTQ+ events are generally a positive lever. However, around a fifth of Restorers would be less likely to visit a venue programming cause-led events; attractions with a large Restorer audience should consider the trade-offs.

	More likely to visit	Think positively (no visit change)	Less likely to visit	No effect / not sure	Positive (more+positive)	Negative (less)	Net Score
All audience (n=1,186)	13%	22%	15%	49%	36%	15%	**+21**
Engaged Explorers (n=308)	21%	26%	12%	41%	47%	12%	**+35**
Sociables (n=272)	18%	25%	11%	46%	43%	11%	**+32**
Cultural Purists (n=270)	8%	23%	17%	51%	31%	17%	**+14**
Restorers (n=336)	7%	15%	20%	57%	22%	20%	**+3**

If a visitor attraction hosted a dedicated LGBTQ+ event, Pride partnership or community evening, how would that affect your view of the venue? (Net score)

Interpretation

This table shows the net response to this question, with the net score showing the % positive responses (“More likely to visit” and “Would think positively about it, but it wouldn’t make me more likely to visit”) minus the % negative responses (“Less likely to visit”).