

ARE PEOPLE READY TO VISIT ATTRACTIONS AGAIN?

CONSUMER SENTIMENT STUDY

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ARE PEOPLE READY TO VISIT ATTRACTIONS AGAIN?

CONSUMER SENTIMENT STUDY

This is the first in a series of New Visitor reports from A Different View, working in association with Panelbase.com.

A Different View and Panelbase conducted an e-survey with 1019 attractions visitors between 6th and 7th June 2020. All respondents had visited at least one of the attractions listed in the 18 months before lockdown:

Arts Culture Heritage

Outdoor heritage site

Heritage building/historic house

Cathedral or church

Theatre

Museum

Art gallery

Visitor Attractions

Theme park or amusement park

Farm park

Nature park/conservation area

Zoo/safari park

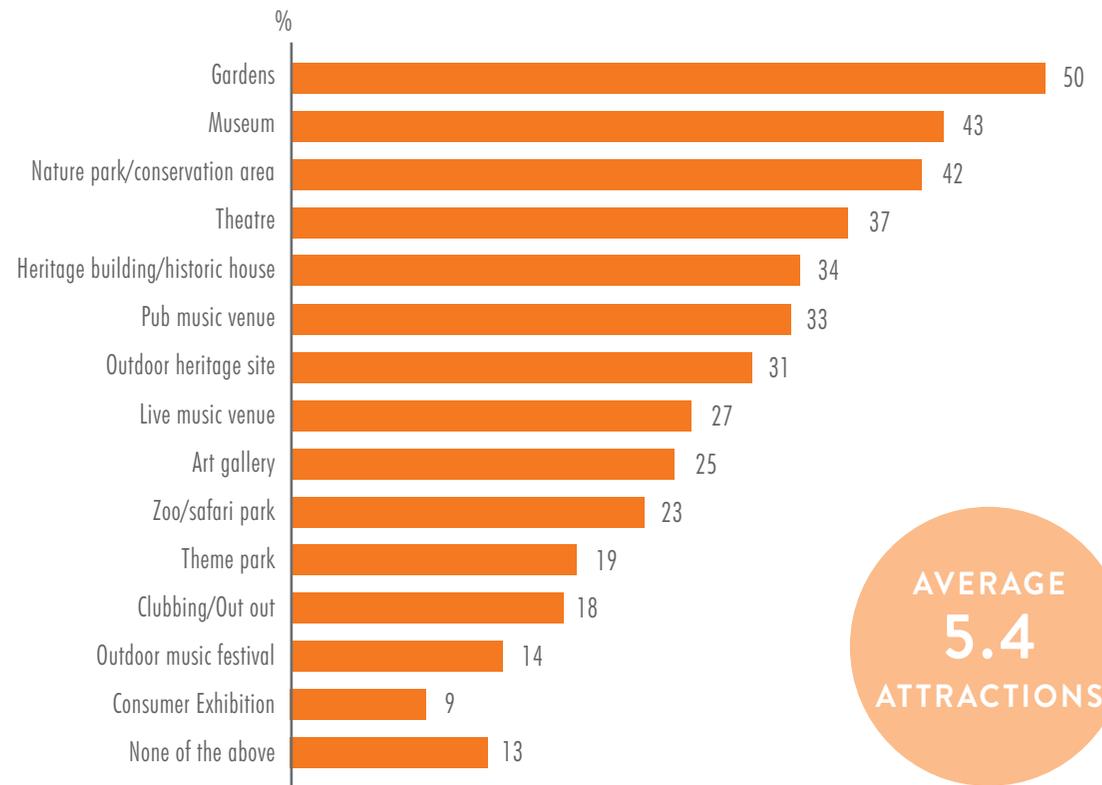
On average each respondent had visited 5.4 different types of attractions in the 18 months before lockdown.

Sample Analysis

When looking at future intentions and what may influence decisions to visit we have focused on age, gender and life stage variations.

For life stage the report focused mainly on independent adults and those who have children under 16 living at home.

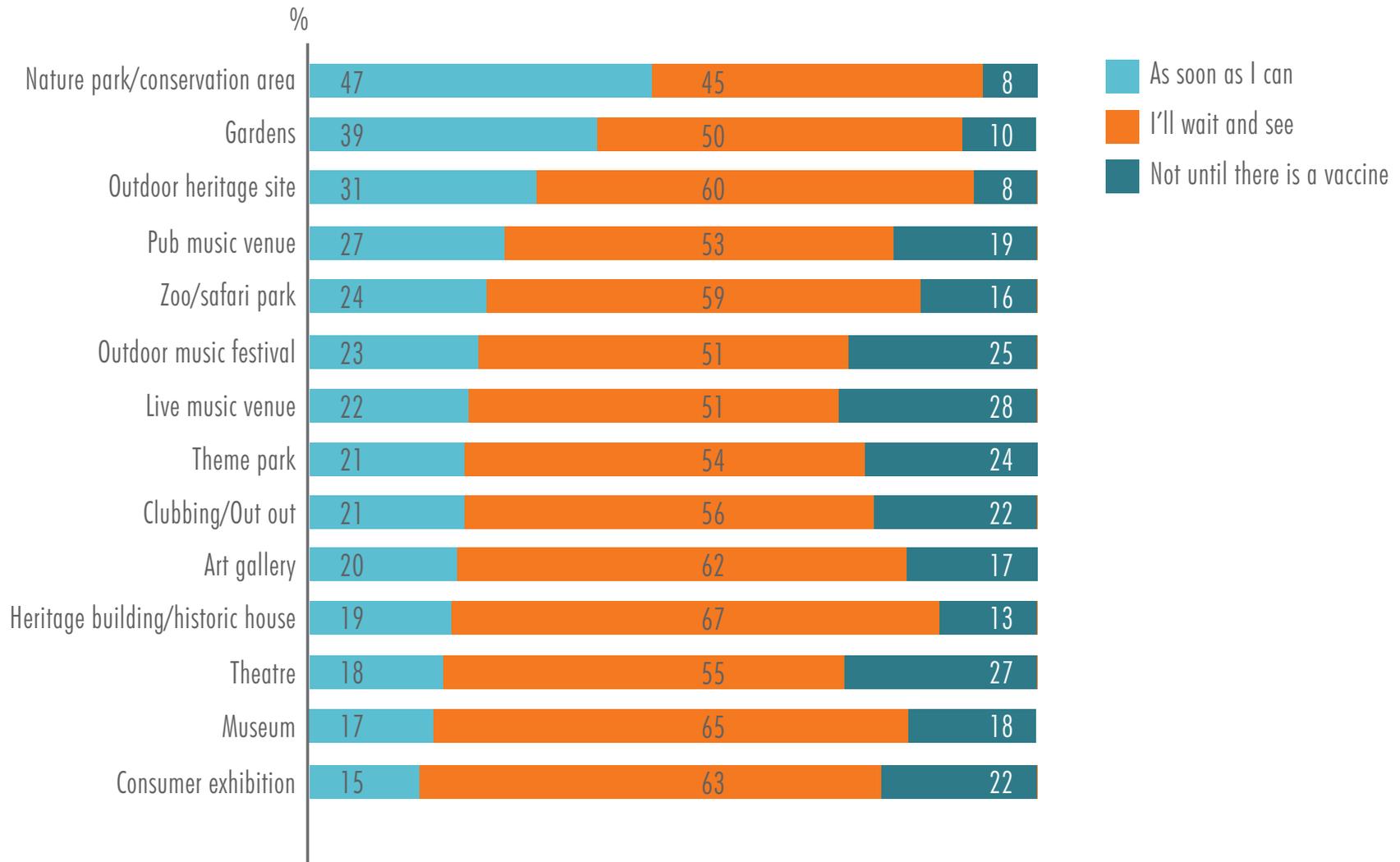
Which of these have you visited in the last 18 months?



AVERAGE
5.4
ATTRACTIONS

All respondents were asked how soon they thought it would be before they visited those they had been to in the 18 months before lockdown:

How soon do you think it will be before you visit each of these again?

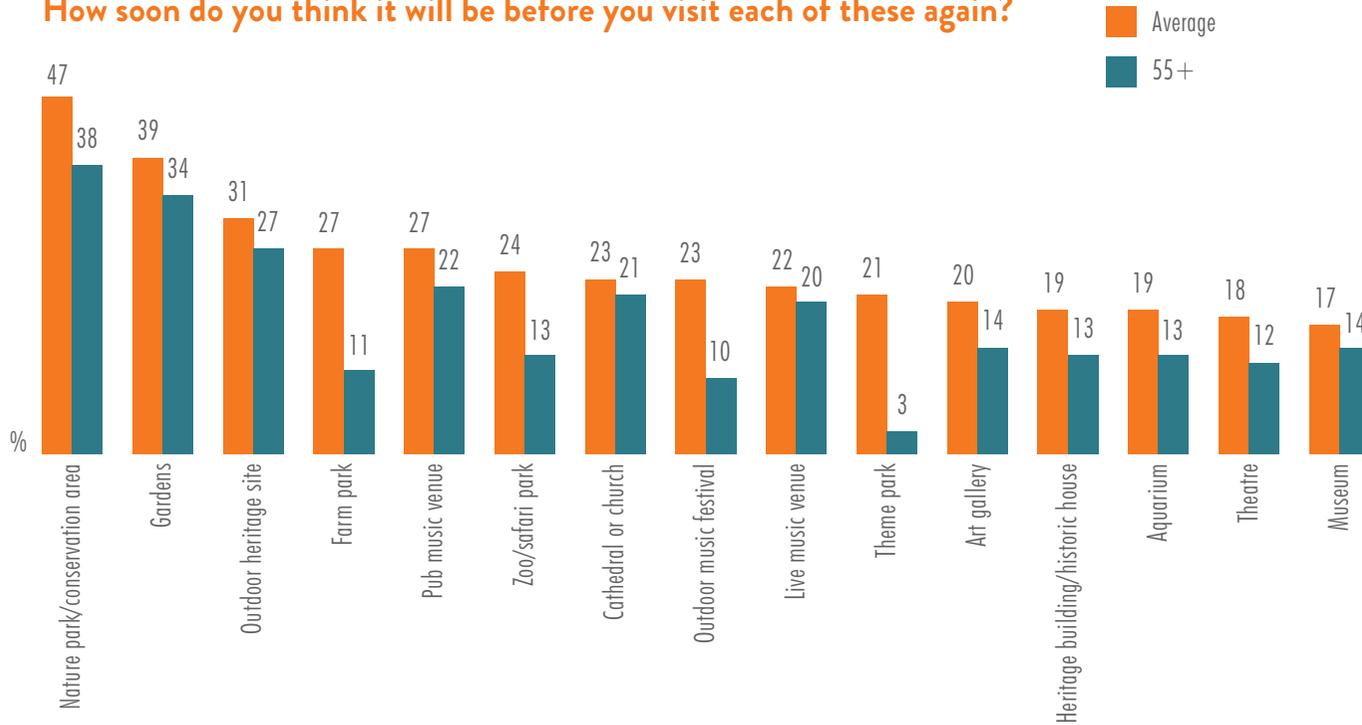


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AGE VARIATIONS

55+ are LEAST likely to visit any of the listed attractions as soon as they can:

How soon do you think it will be before you visit each of these again?



When we look at those who say they will return as soon as they can by age of the respondents we can see significant variations by age groups:

18 to 25s

Nature park	53%
Theme park	30%
Heritage building	26%
Theatre	29%

26 to 35s

Nature park/conservation area	53%
Gardens	48%
Outdoor heritage site	38%
Farm park	34%
Pub music venue	31%
Zoo/safari park	32%
Cathedral or church	32%
Outdoor music festival	32%
Art gallery	30%
Heritage building	26%
Aquarium	22%
Museum	25%

36 to 54s

Farm park	34%
Heritage building	26%

Gender Differences

There are no significant gender differences.

Life Stage Differences

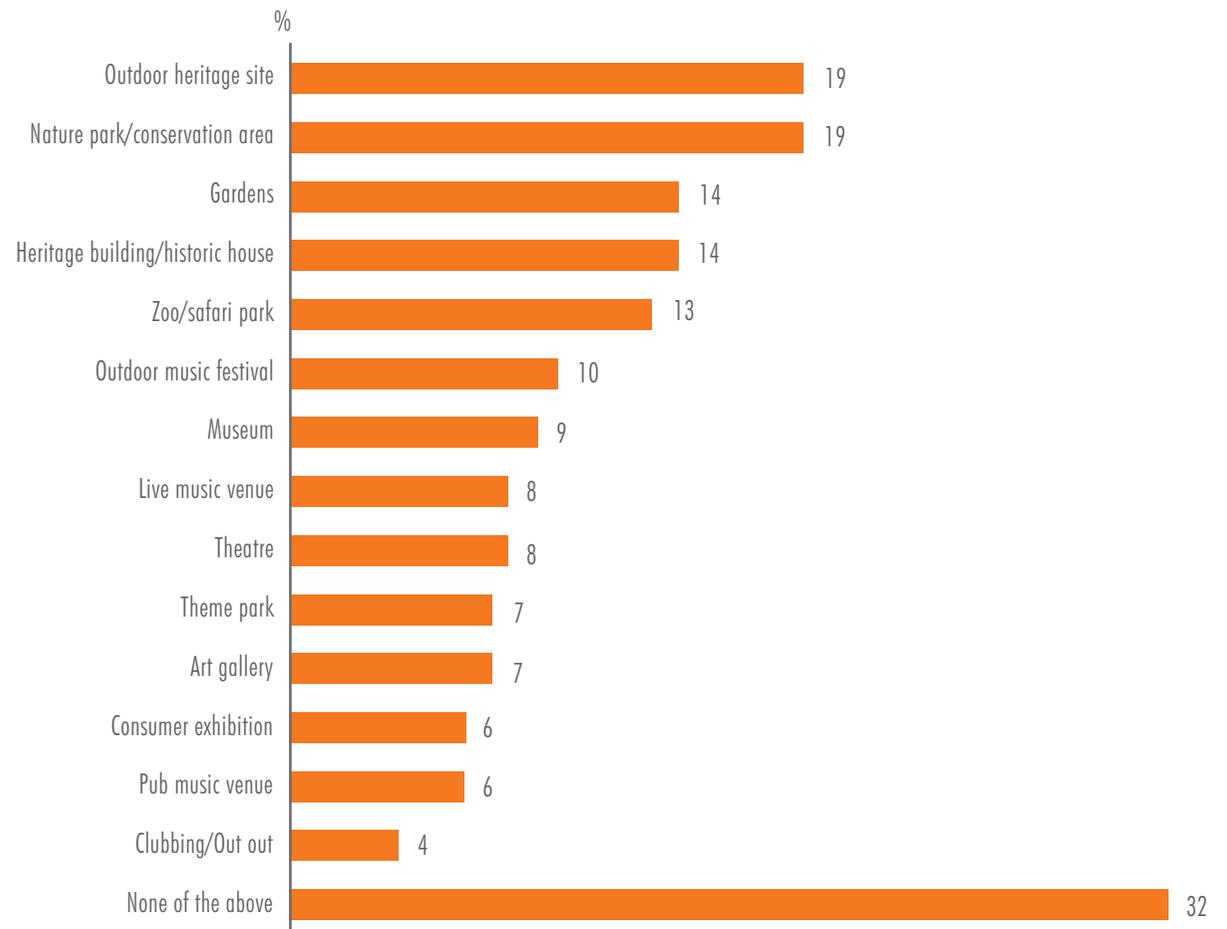
Families with children living at home are less likely to say they will visit 'as soon as I can' than independent adults for all of the experiences.

Independent adults are significantly more likely than those with children of any age living at home to say that they will go to these experience , 'as soon as I can':

Pub music venue	29% vs 19%
Theme park	24% vs 16%
Live music venue	23% vs 16%
Heritage building/historic house	22% vs 13%
Art gallery	22% vs 13%
Consumer exhibitions	21% vs 13%

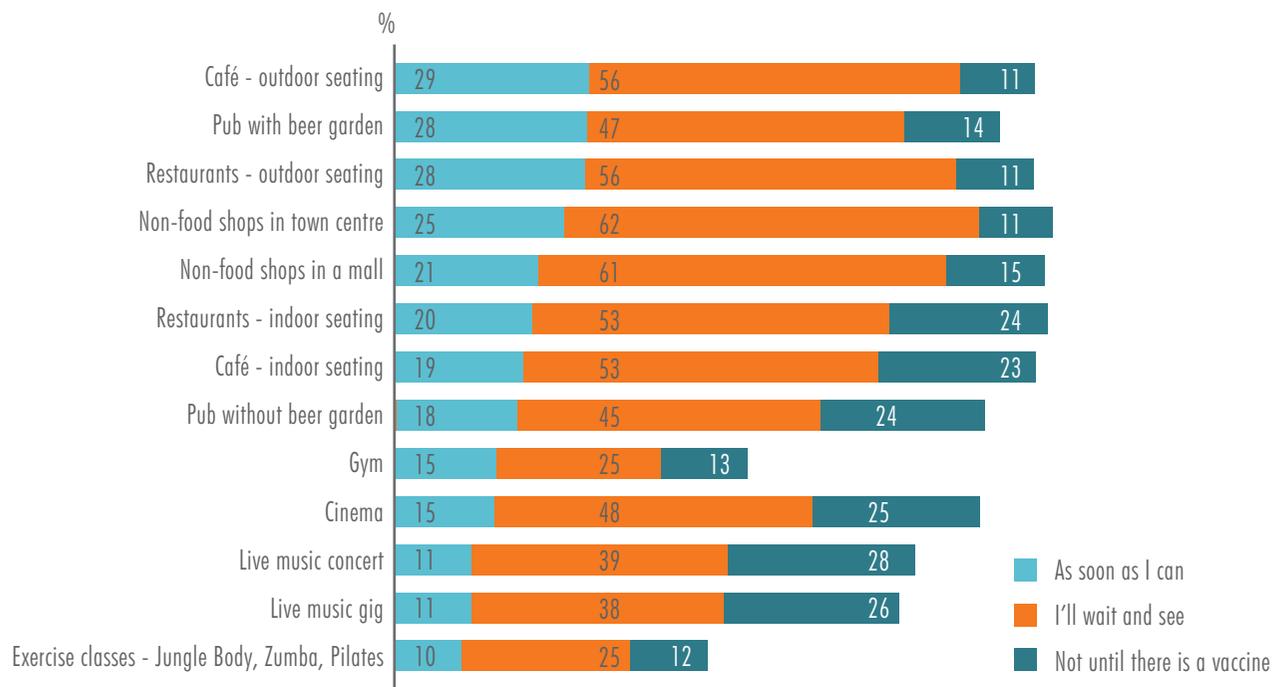
This graph shows where potential visitors are likely to visit after lockdown is lifted, even though they had **not** visited them in the previous 18 months.

Which of these are you likely to visit when they are open again after lockdown?



To help give a broader understanding of what people are wanting to do as we emerge from lockdown, we delved a little deeper. Not surprising cafes, pubs and restaurants with outdoor seating get a big thumbs up. Conversely, it looks like live music venues and cinema are not going to find it easy to bring people back.

When do you think you are likely to visit any of these? Only answer for those that you did/visited BEFORE LOCKDOWN



Age Variations

The 55 + age group are significantly less likely to say they will visit 'as soon as I can' for all experience options. For all other activities the 18 to 25 age groups are significantly more likely to say 'soon as I can' for visiting a gym, 29%, restaurants with outdoor seating 40% and with indoor seating, 32%, café with indoor seating 28%, and the cinema 26%.

Gender Variations

There are few gender variations. Men are significantly more likely to say they will go to a pub without a beer garden 21 % vs 15% 'as soon as I can', and with a beer garden 31% vs 25%. Women were more likely than men to say they would go to Exercise classes – Jungle Body, Zumba, Pilates etc 'as soon as I can' than men 14% vs 8%.

Life Stage Variations

Independent adults are significantly more likely to visit four experiences than those with children living at home 'as soon as they can':

Pub with a beer garden	30% vs 23%
Restaurants - indoor seating	22% vs 16%
Café - indoor seating	20% vs 14%
Pub without a beer garden	20% vs 15%

PHYSICAL DISTANCING



Photographer Moritz Haase - haase.moritz@gmail.com

Having established respondents propensity to return to attractions we showed them an example of physical distancing in action at the Berliner Ensemble to see what effect this might have.

30% were still unlikely to want to go to a venue like this having seen physical distancing layout and

while 34% were likely or highly likely to go, a high 37% said that they remained undecided; they need more information to help them to make a purchase decision.

Initially, only 19% said they would go back to a theatre 'as soon as I can' and 57% wanted to wait until they had more information. The implication here is that it is possible to shift visitor opinions with clear information.

Age Variations

The 55+ age group were significantly less likely to say they would attend a performance, 37% compared to 23% on average.

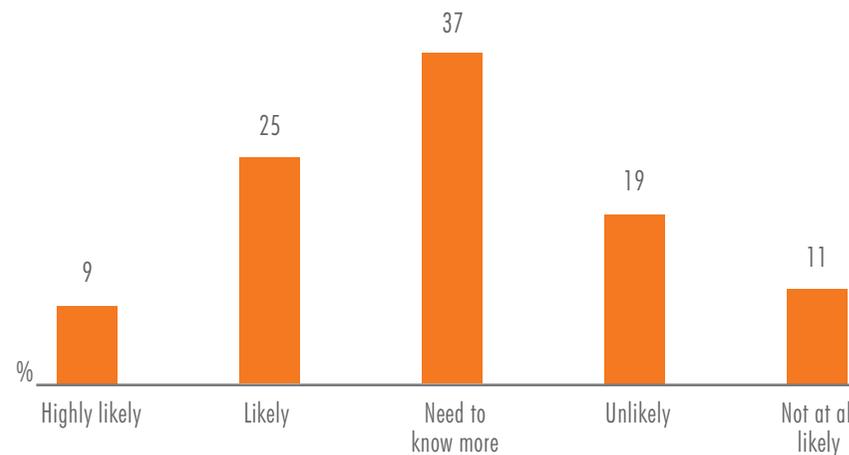
Gender Variations

There are no significant gender variations.

Life Stage Variations

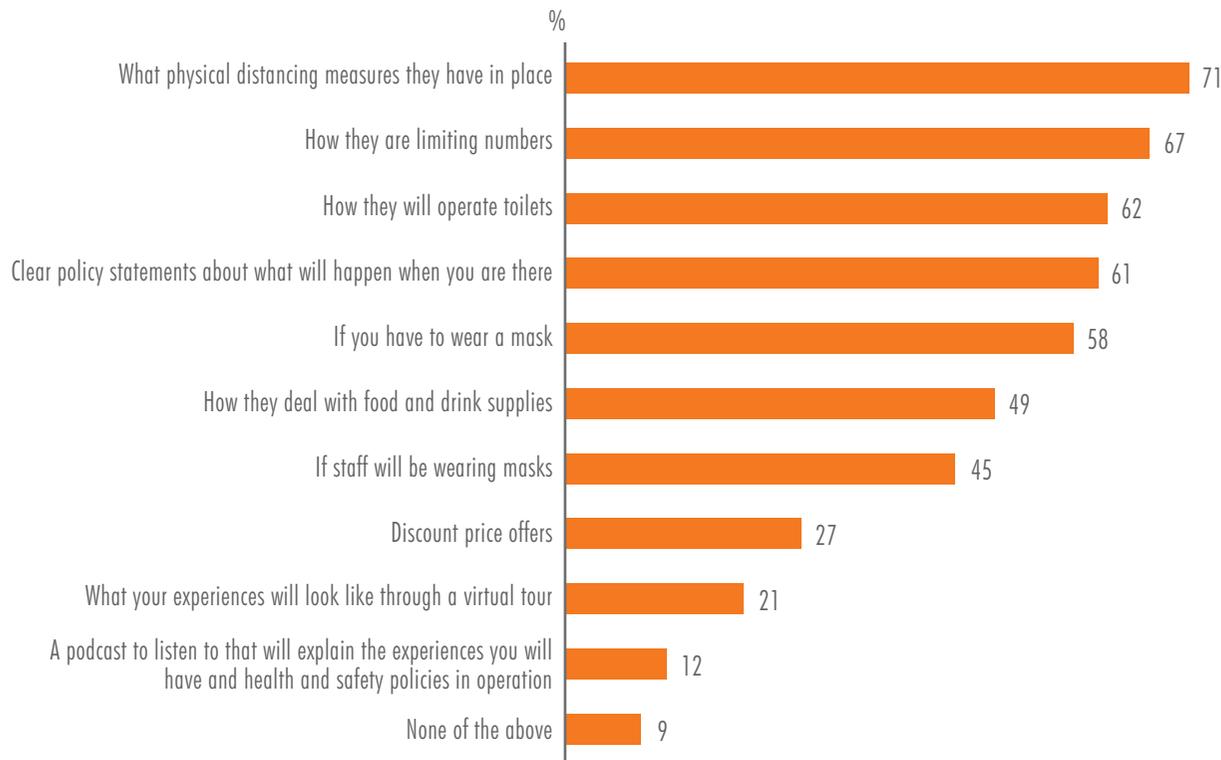
There are no significant life stage variations.

If a venue could offer you **PHYSICAL DISTANCING** like that shown in the picture above, how likely are you to attend a live performance at a venue?



We then asked respondents:

Which of these is it IMPORTANT for you to see on a website for a visitor attraction or event venue to enable you to decide to visit after lockdown?



Age Variations

Those who are 55+ are significantly more likely than all other age groups to say it is important for them to see this information on a website; except 'What your experiences will look like through a virtual tour' and 'A podcast to listen to that will explain the experiences you will have and health and safety policies in operation'. 'How they will operate toilets' is very important for 55+ at 75% compared to the average of 62%.

Gender Variations

Women are more likely than men to say that they want all information to help them to decide to visit. 'What physical distancing they will have in place' and 'How they will operate the toilets' are very important to women especially at 78% and 70% respectively.

Life Stage Variations

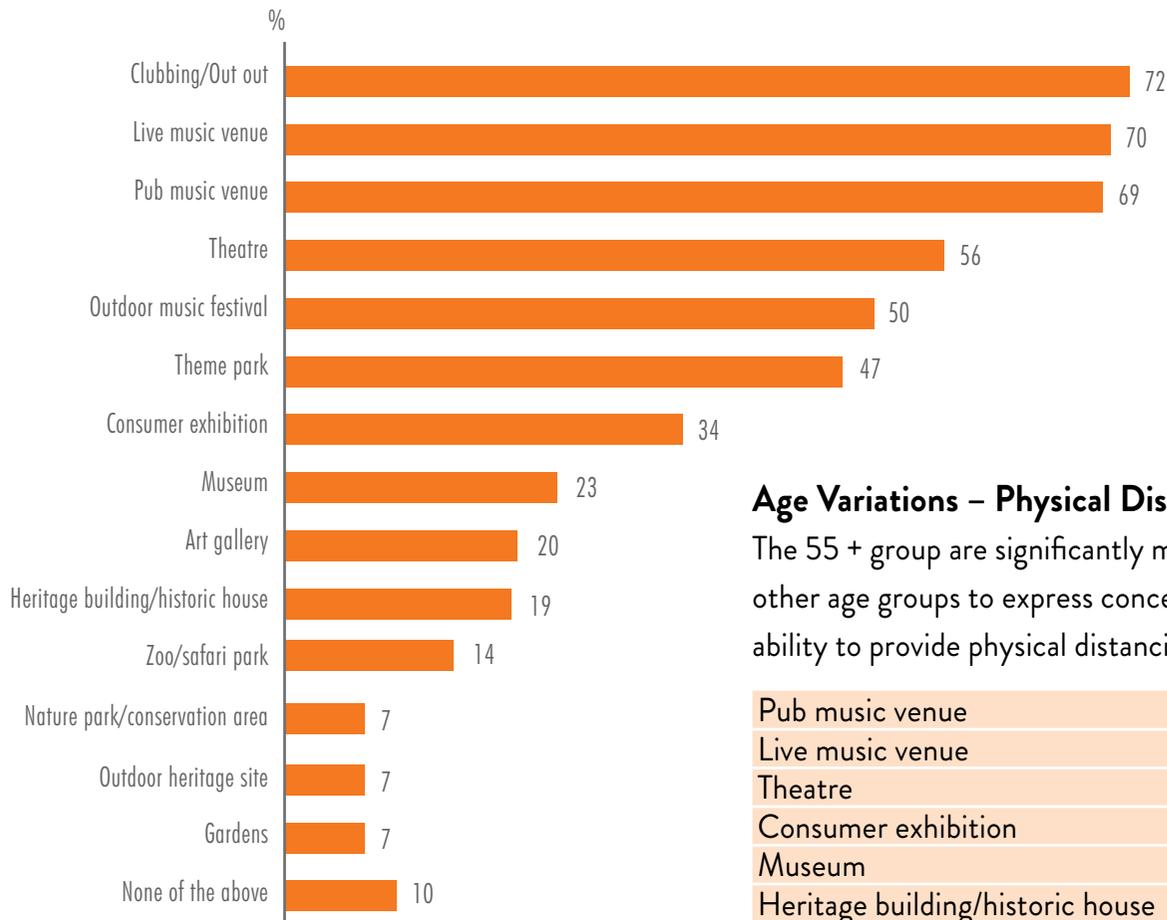
There are no significant life stage variations.

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We then asked respondents to say which experiences or attractions may find it difficult to provide PHYSICAL DISTANCING. Live music

venues and pub music venues are viewed as the most challenging and not surprising anything outdoors is not viewed as particularly challenging.

Which of these do you think may find it difficult to provide PHYSICAL DISTANCING to meet your needs? Please tick all that apply



Age Variations – Physical Distancing

The 55 + group are significantly more likely than other age groups to express concern over the ability to provide physical distancing for:

Pub music venue	79%
Live music venue	78%
Theatre	74%
Consumer exhibition	46%
Museum	28%
Heritage building/historic house	26%
Art gallery	25%

Gender Variations – Physical Distancing

Women are more likely to consider that two of the listed experiences will find it difficult to provide physical distancing.

Clubbing	63% vs 58%
Theme parks	52% vs 44%

Life Stage Variations – Physical Distancing

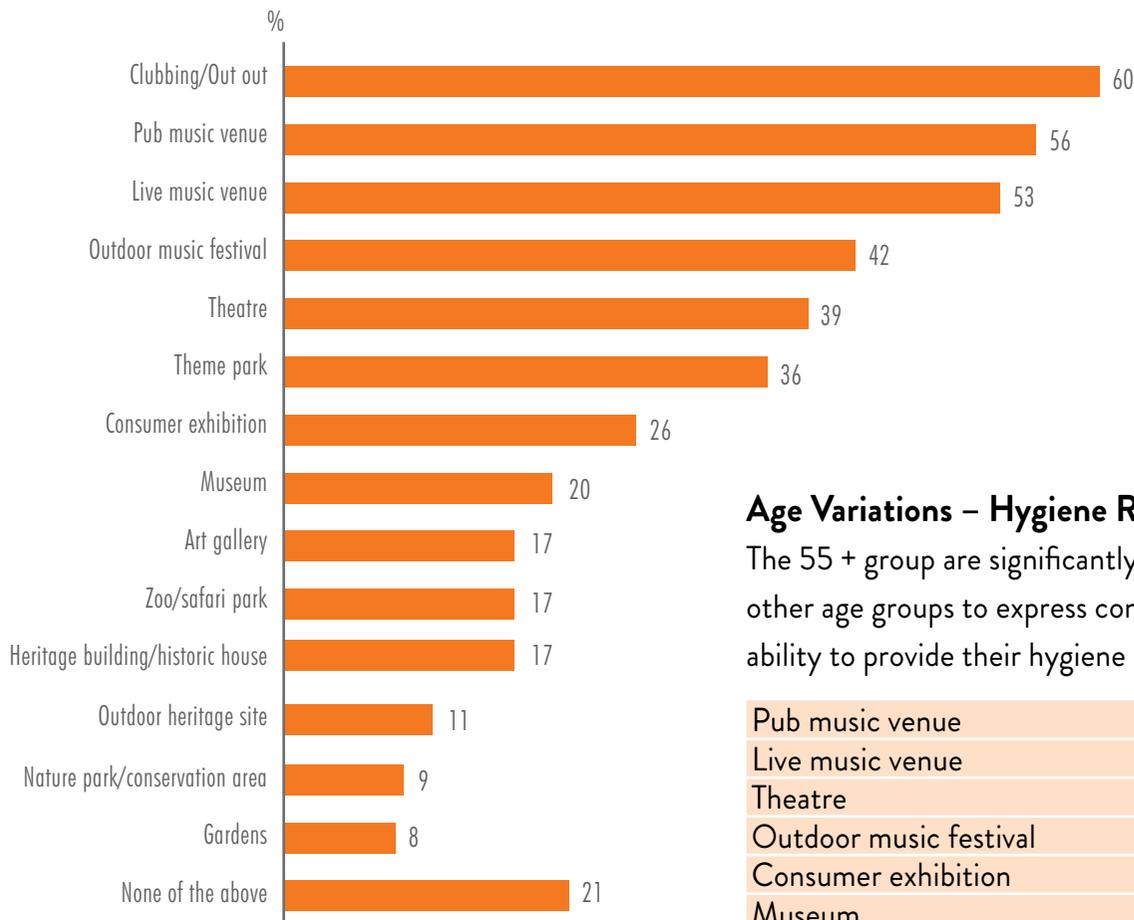
We can see some differences between Independent adults and those with children living at home in how they consider different venues can provide physical distancing:

Live music venue	71% vs 62%
Pub music venue	70% vs 62%
Theatre	55% vs 50%
Outdoor music festival	52% vs 40%

We then asked respondents to say which experiences or attractions may find it difficult to provide HYGIENE requirements. Pub music

venues and Live music venues are viewed as the most challenging and not surprising anything outdoors is not viewed as particularly challenging.

Which of these do you think may find it difficult to provide for your post Covid-19 HYGIENE requirements? Please tick all that apply



Age Variations – Hygiene Requirements

The 55 + group are significantly more likely than other age groups to express concern over the ability to provide their hygiene requirements for:

Pub music venue	66%
Live music venue	64%
Theatre	52%
Outdoor music festival	50%
Consumer exhibition	38%
Museum	27%
Art gallery	23%
Heritage building/historic house	22%

Gender Variations – Hygiene Requirements

There are three experiences where Women are significantly more likely to think that they will have difficulty in meeting their post-Covid 19 hygiene requirements:

Clubbing	75% women vs 69% men
Theme parks	42% women vs 31% men
Outdoor music festivals	46% women vs 40% men
Theatre	42% women vs 36% men

Life Stage Variations – Hygiene Requirements

We can see some differences between Independent adults and those with children living at home for the ability to provide for their hygiene requirements:

Live music venue	54% vs 41%
Pub music venue	57% vs 40%
Theatre	38% vs 31%
Outdoor music festival	43% vs 36%



This survey was conducted by Vivid Interface in conjunction with Panelbase and using Snapsurveys Software.

SnapSurveys

For further information about Vivid Interface research or to ask about this consumer sentiment survey please contact:

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