

# COVID-19 Visitor Sentiment August 2020

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# Introduction

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This is a verbatim copy of the presentation script delivered to the IFF Conference.

We began researching COVID-19 sentiment early June to provide our visitor attractions and art, culture heritage markets will insights. Obviously the insights have a short shelf life as circumstances change, so our second national study of 1,000 active visitors to festivals music venues, visitor attractions and arts and culture scene ended on 27<sup>th</sup> August. What you will hear now is pretty much as up to date as can be.

We added festival specific questions for this new study at the behest of Jon Chappel from IQ specially for this conference today. The presentation, slides and commentary and the previous COVID reports are available to download from our website:

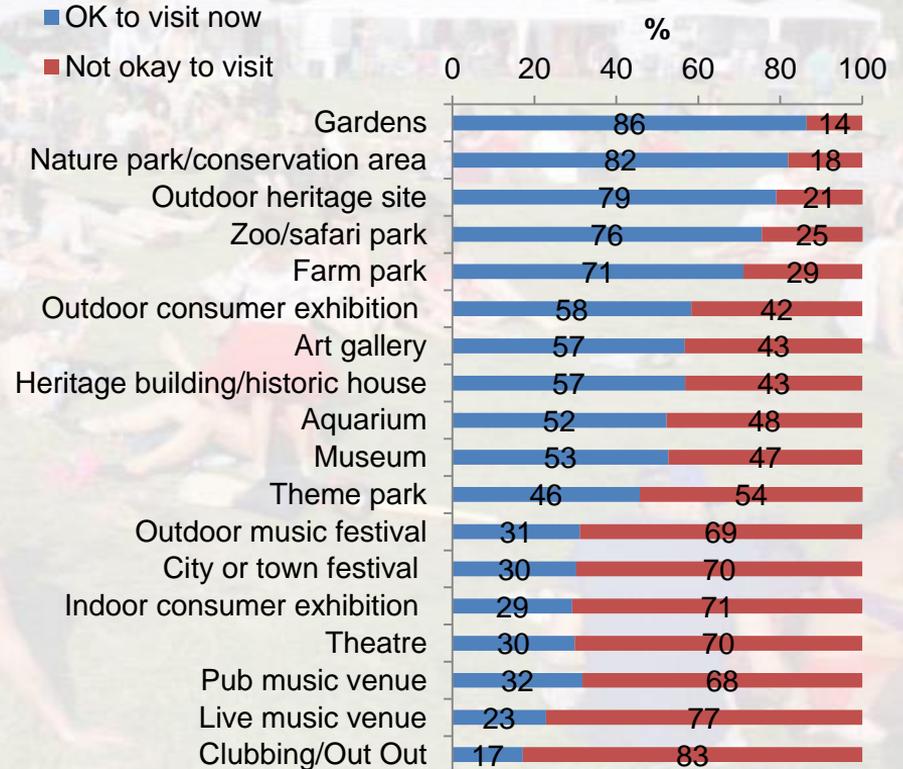
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# Which of these do you think it is OK to visit now that lockdowns have ended?

We can see from this chart what it is that people feel is ok to go to. There is a pattern here, and attractions where it is easily possible to maintain distancing are considered OK to visit now.

Going out to walk around gardens is ok, but as we travel down the list we see where the shifts in thinking take place and an outdoor consumer exhibition – and here we gave examples of a county show– places where historically we would expect crowds, and the percentage of ‘not okay to visit’ increases. We also looked at consumer exhibitions like the Ideal Home show – one our previous clients and we can see a very big difference, and only 29% of our sample saying that it ok to visit.

Looking at the subject matter of the conference today, we can see outdoor and city and town festivals we have a significant majority of our active 1,000 sample saying they are not okay to visit. In fact as we can see, live music, outdoor festivals and live music venues don’t come out well from this at all at the moment. Clubbing/Out Out is clearly seen as a challenge with only 17% saying it is ok to visit now.

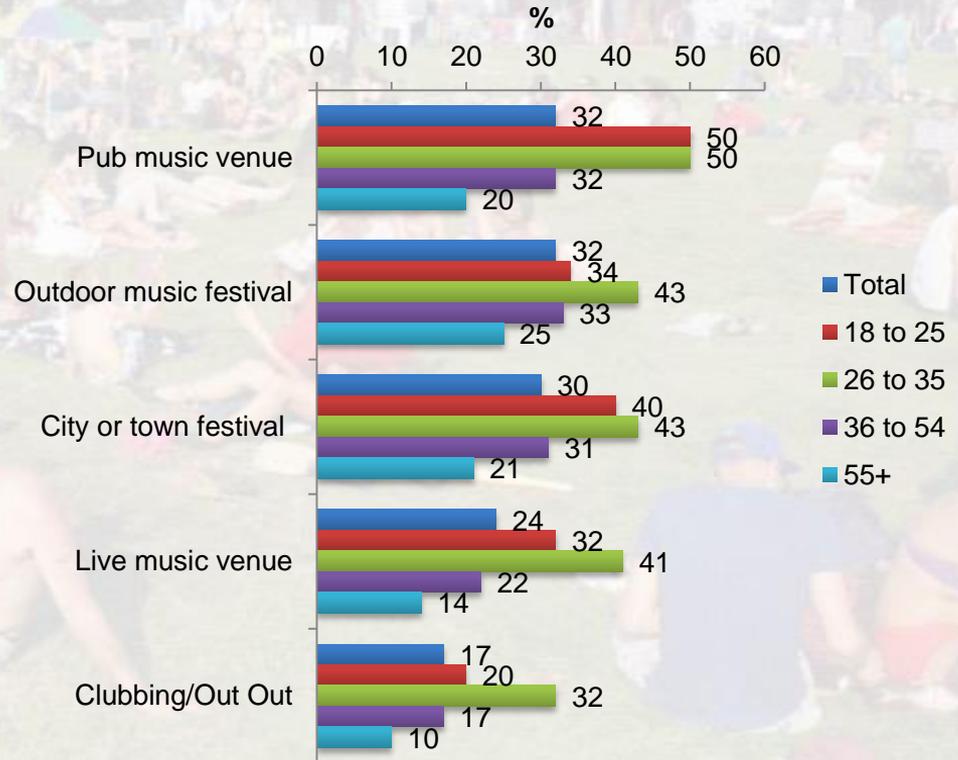


## Which of these do you think it is OK to visit now that lockdowns have ended?

We would all expect differences in these numbers by the ages of the respondents and of course there are; but not as much as you might think.

Let's look at age differences for the key music related activities. Interestingly, the 18 to 25's are pretty close to average here for festivals with only 34% saying OK to go to an outdoor festival and they are more likely to say a pub music venue and a city or town festival.

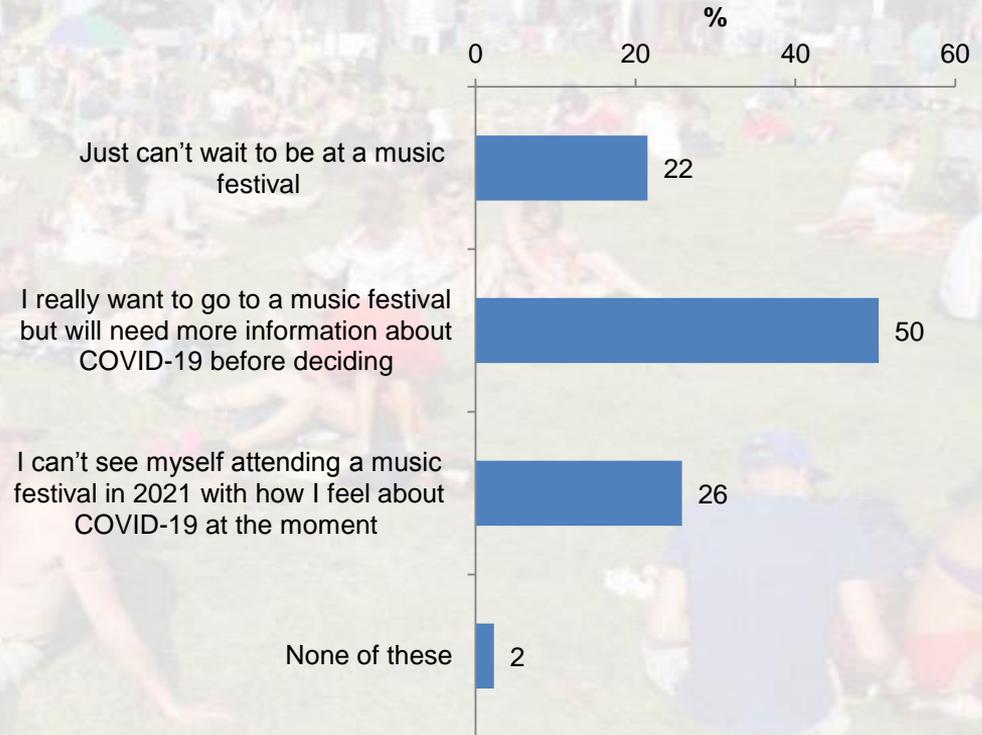
The 26 to 35s in green are the age group that most wants to go out now. There are no significant gender differences.



## It is likely that the next time you can visit a music festival will be in 2021. Tick the one which best describes you.

From these results it seems that a significant majority of people are not ready to attend live music in whatever format it is presented in. When we separate out the core 300 festival goers in the sample, we can see that only 22% are thinking that the time will be right in 2021.

So, festival goers are more reticent than the active public overall. Only 22% ready to party now and 50% really wanting to go but information about COVID-19 precautions may be essential in encouraging them.



## Please rate your expectation of being able to achieve the benefits below in attending a music festival in 2021.

Looking forward to music festivals in 2021, we know from previous research that the festival experience is very much about being with friends – socialising in a group – meeting new people and engaging with them. Escaping from the realities of life and having a weekend of partying with great live music and DJs.

We asked our festival going respondents how well they thought that 2021 festivals would be able to deliver. At this time we can see that the lowest rating elements are about the ability to meet with new people and to mix socially with lots of people and of course this an accurate reflection of the truth of the matter. In a physically distanced world it is difficult to allow festival goers to meet with new people but it may be very beneficial to have booking systems that allow social groups to be in pods or bubbles close to each other and to cater for this at the booking stage. Otherwise, when we look at the expectations for 2021, overall, the respondents feel that they will be able to achieve their perceived festival benefits. All we have to do now is to persuade them that they can come. There were no significant age or gender differences which was a surprise for us – everyone thinks the same.

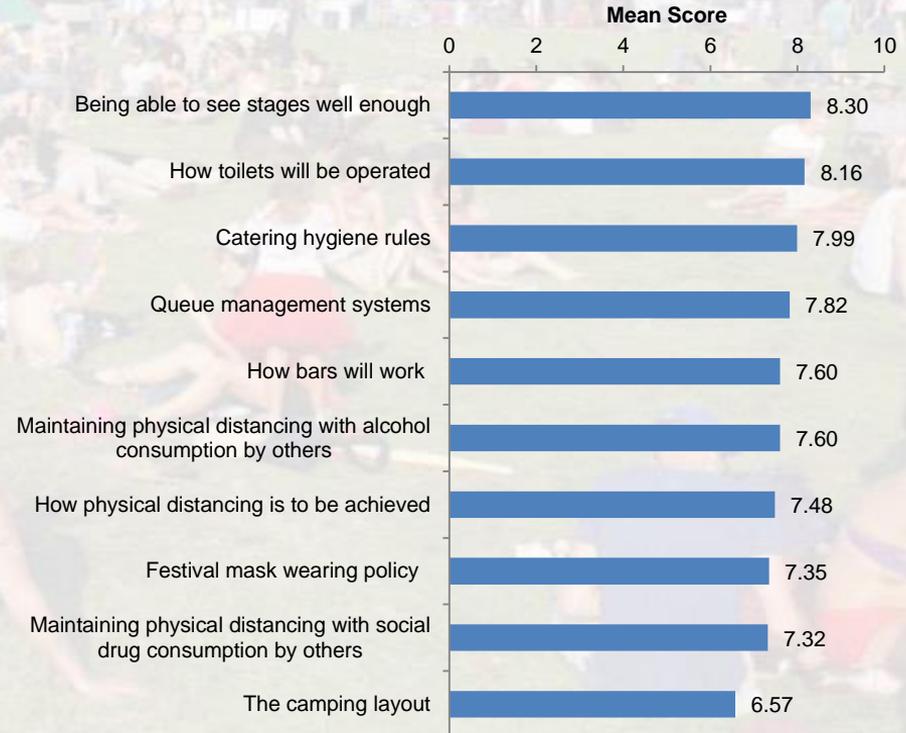


# Please rate each of these for how important they would be for you when considering attending a your next music festival?

Now, if we are going to get people to festivals, what is important for people at this time when they are looking at their next festival outing? People want to know that they can see the stage and as we found out in our last round of research in June – people want to know about toilets!

After our first results arrived in June, I immediately told our festival clients to double down on toilet provision and one reported back to say that for their festival there was not an extra toilet to be had for 'love nor money' - the toilet providers said it is was because of massive increase in outdoor weddings planned for 2021.

Female festival goers give higher information requirements in every case than men but the individual differences are not statistically significant and there are no significant difference by age.



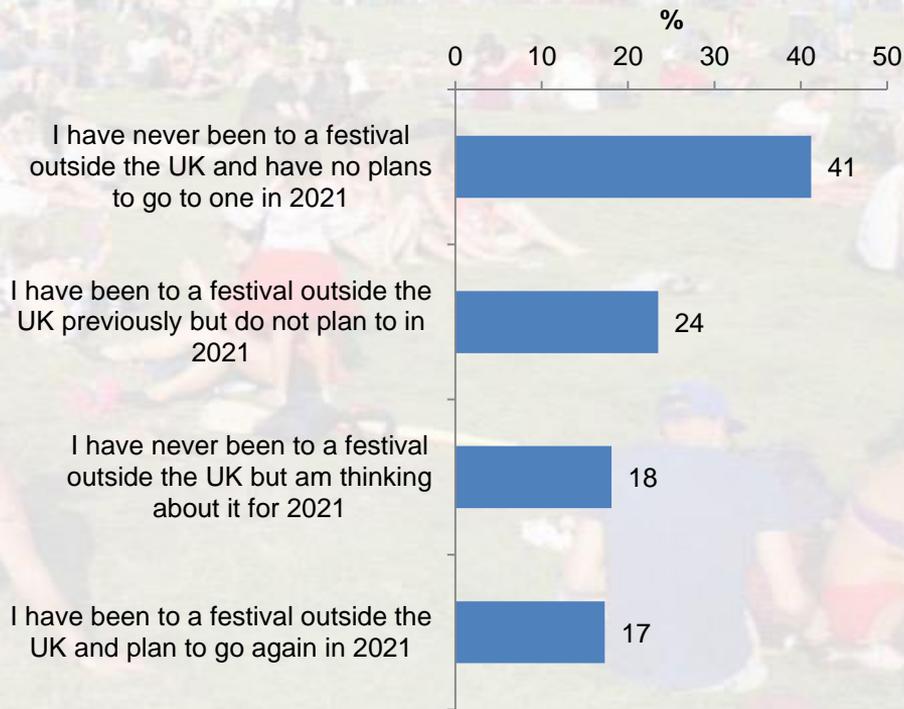
# There are music festivals held in other countries that lots of UK festival fans attend. Which of these best reflects your thinking?

We then asked about festivals that take place outside of the UK.

In total 41% of our sample had been to a music festival held outside the UK.

17% said that they had been to a festival overseas and planned to again in 2021.

A further 18% said they had never been to an festival outside the UK but were thinking about it for next year – so 35% of our UK festival goers say that visiting and overseas music festival is a possibility. There were 5m festival goers in the UK in 2018.



## Which of these are factors that may influence you to NOT go to a music festival in another country in 2021?

Finally, we asked the respondents which from a list of factors may deter them from attending a festival in another country in 2021. Only 5% of the sample said that none of the listed potential concerns were not relevant to them. Not surprisingly the combination of COVID-19 infection rates and the potential for quarantine are the two key issues and then a desire for information about onsite logistics. The implication for this is that while we have seen 35% of festival goers plan to go or are thinking about going, they may delay committing financially until very close to the festival. So there is still a long way to go.

The overall summary is that there is a strong requirement for more information and that people still have concerns about crowds and crowded spaces.

