

Tracking Consumer Sentiment on the Impact of COVID-19

Summary Report: Visitor Attractions

29th April 2020



ALLIGATOR



Executive Summary

While there may be no sugar coating the impact of this crisis period on attractions, the sector as a whole has been widely praised for its reaction, its willingness to reinforce government messaging, and its innovation in providing visitors with different ways of engaging with content. Relative to other sectors its reaction has been highly rated. Looking ahead, days out with loved ones are amongst the most sought after plans for the 'day after' post lockdown period.

However, talk of when and how the lockdown may finally be lifted is making consumers think in more detail about the circumstances in which they will engage in those 'day after' activities. While there is undoubtedly pent up demand for days out, some consumers are reticent about the idea of booking until a vaccine is available, while others at least want to let some time pass and / or let others take the plunge first.

The majority want to see at least some measures put in place – and if anything it is frequent visitors who are the most demanding. This puts the ball firmly in the court of attractions to review their customer touchpoints and consider how they may be adjusted to facilitate adequate social distancing. And it's not just about the operational *reality* of how this will work, it's about the customer's *perception* – hence clarity and effectiveness of communications will remain a top priority.

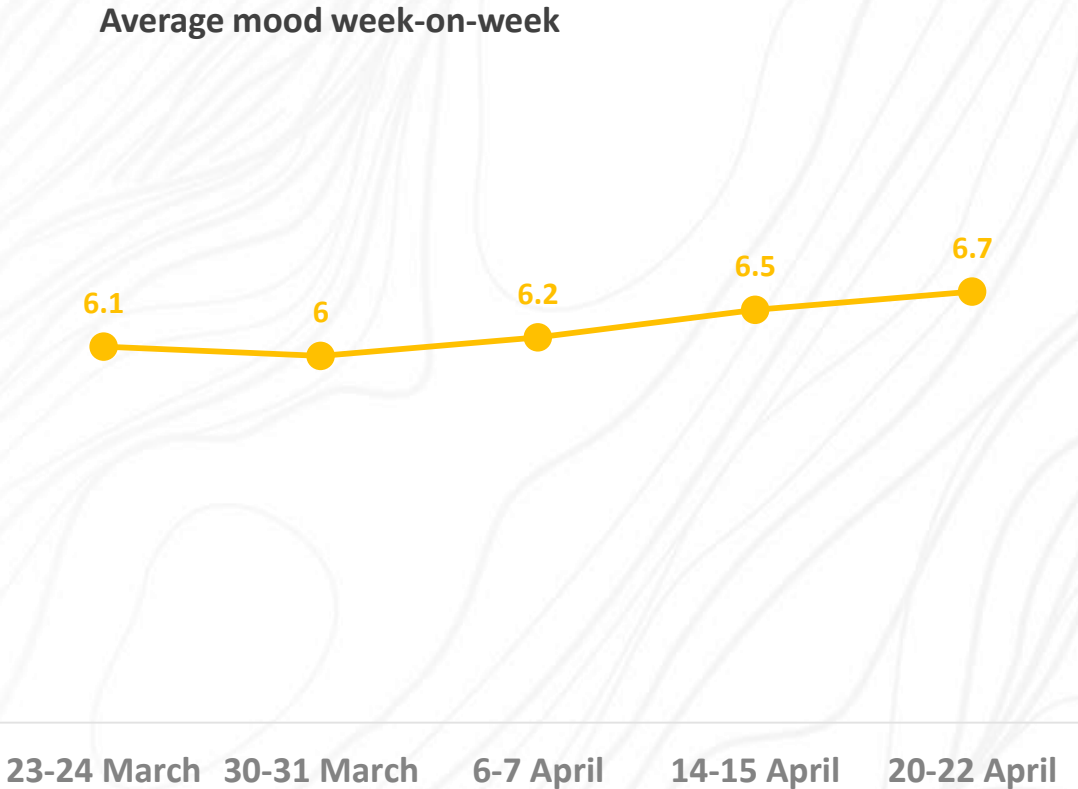
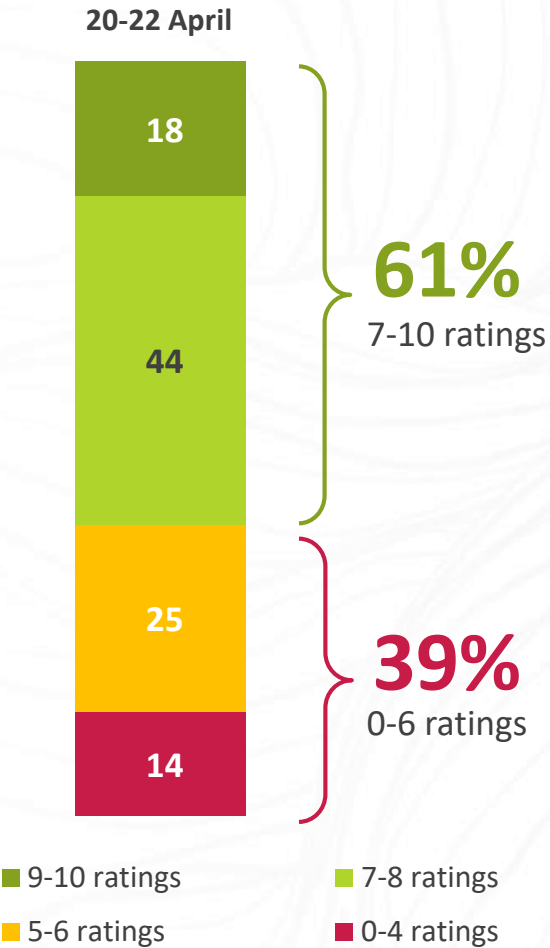
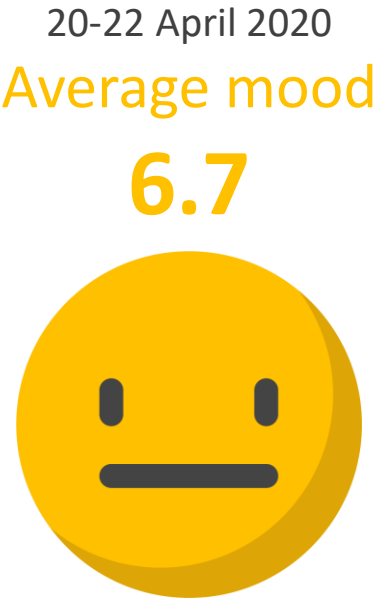
Although there has been some talk of reducing admissions prices when attractions re-open, we recommend *against* this step. Most importantly, the majority of attraction visitors do not *expect* to pay less when lockdown is lifted. In the short term there is likely to be sufficient demand to visit - particularly from frequent visitors who have been starved of attractions visits in recent months. Beyond the initial demand bubble, attractions will likely be expected to reduce visitor capacity anyway, meaning the supply will drop alongside the demand. In the long term, reducing prices may mean visitors expect lower prices beyond the crisis.

There may yet be an opportunity for attractions to recoup some lost admissions revenue. A small but significant proportion of the UK population currently find themselves better off as a result of COVID-19 (particularly social grades AB), and are willing to pay more to visit exhibitions and attractions. Visitor attractions may want to provide premium content to meet this demand – 'after hours, private exhibition tours' for example – or appeal to their altruistic side to encourage gift aid and donations.

In the meantime, attractions should engage with their loyal visitors on social media to create a desire to visit when they open. Historical Royal Palaces and Merlin are two examples of organization where their followers have been asked to share their favorite moments from previous visits. This type of activity will generate nostalgia, a feeling of loss, and a desire to revisit when they re-open. When they do re-open visitors are unlikely to require 'new experiences' – indulging in the core offer is likely to be enough.

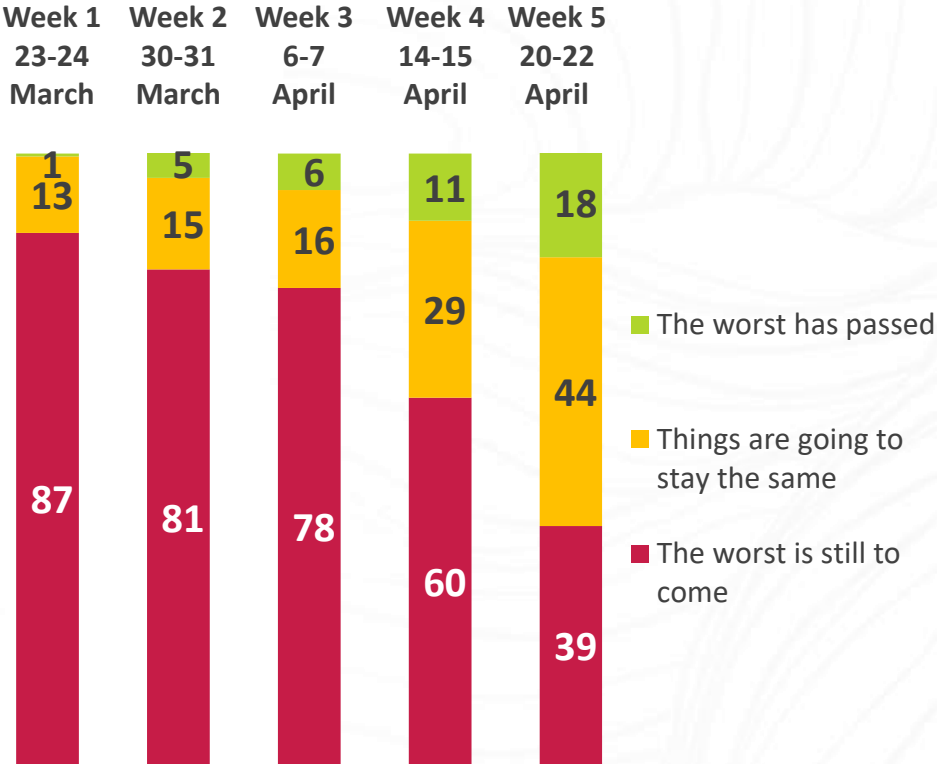
The UK's national mood is improving consistently, week-on-week.

More than 3 in 5 of us are now feeling positive

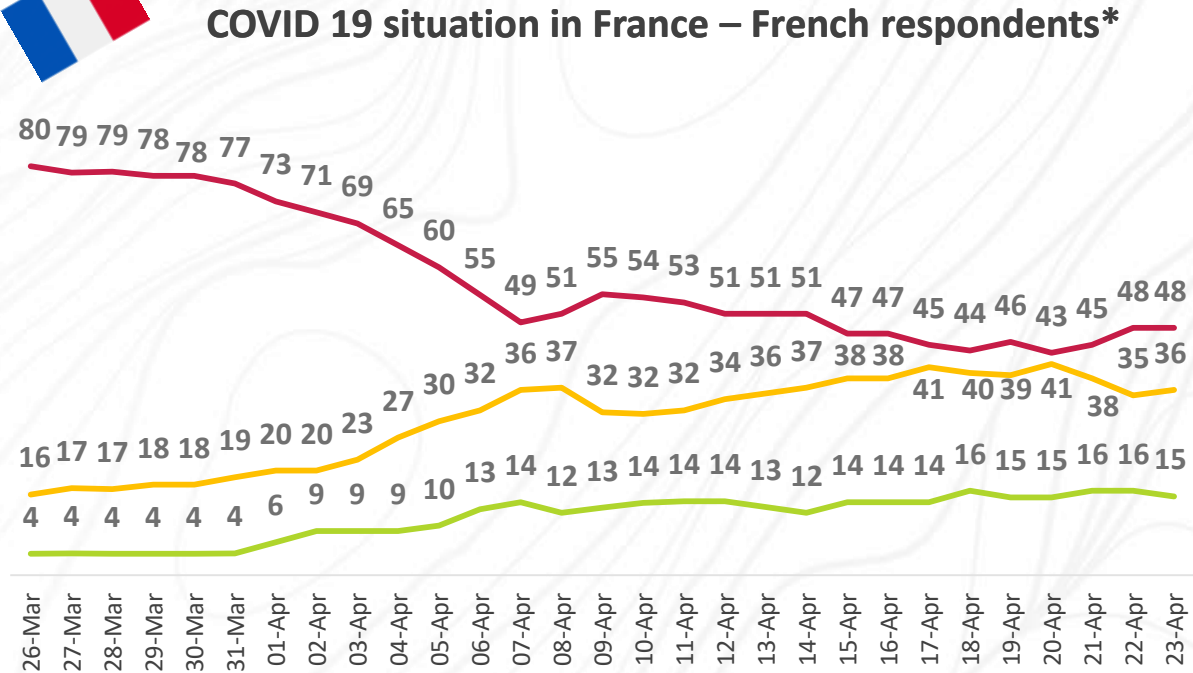


Q5: How would you rate, between 0 and 10, your mood today? (%)

Last week's significant decline in the proportion who feel *the worst is still to come*, is followed by an even bigger drop this week. The plurality now feel that *things are going to stay the same*.

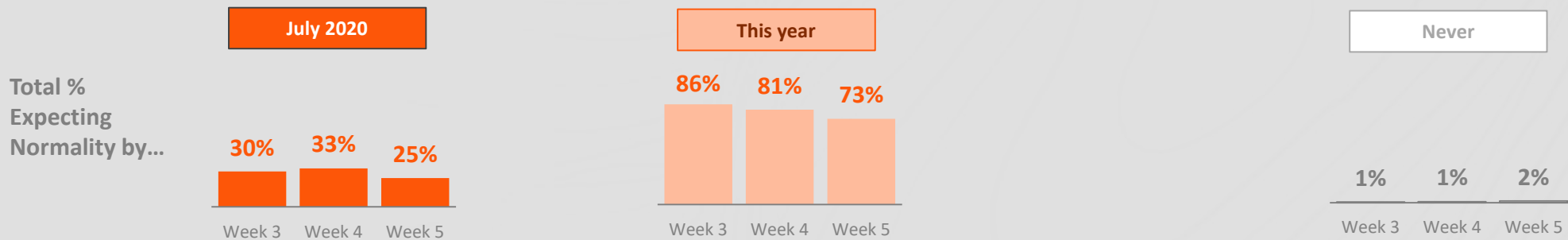
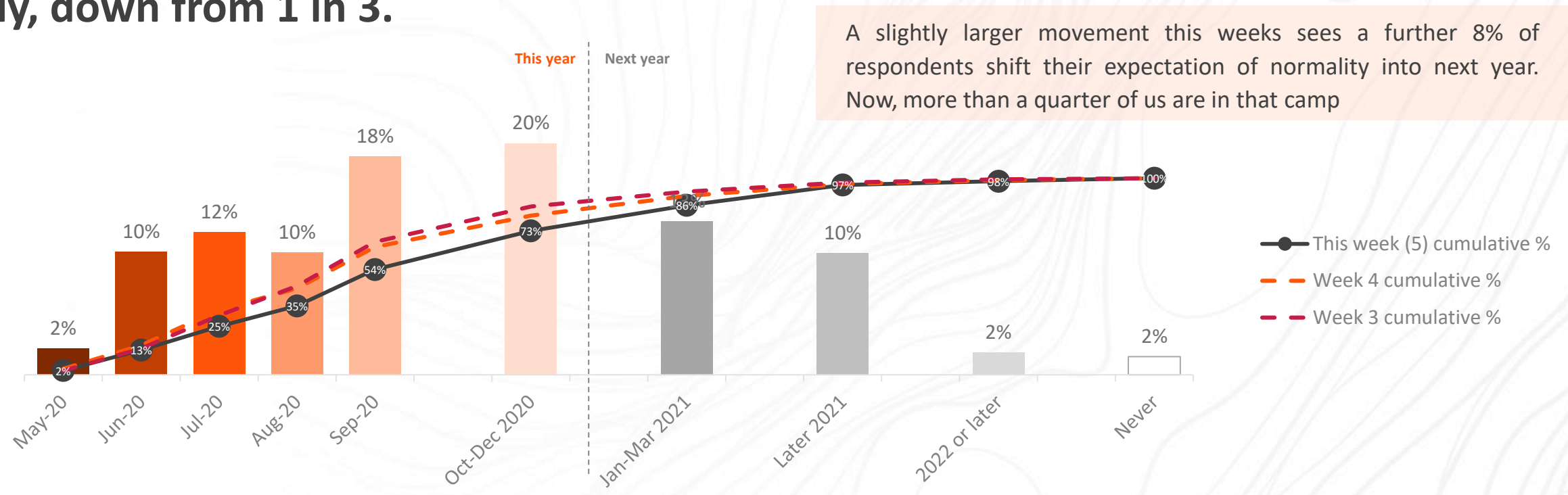


Since the start of the crisis, we have reported that the UK has been approximately 10 days behind France in terms of our perception of the crisis. For the first time, however, we are now reporting a more positive position in the UK, with significantly fewer people believing *the worst is still to come* and slightly more saying that *the worst has passed*.



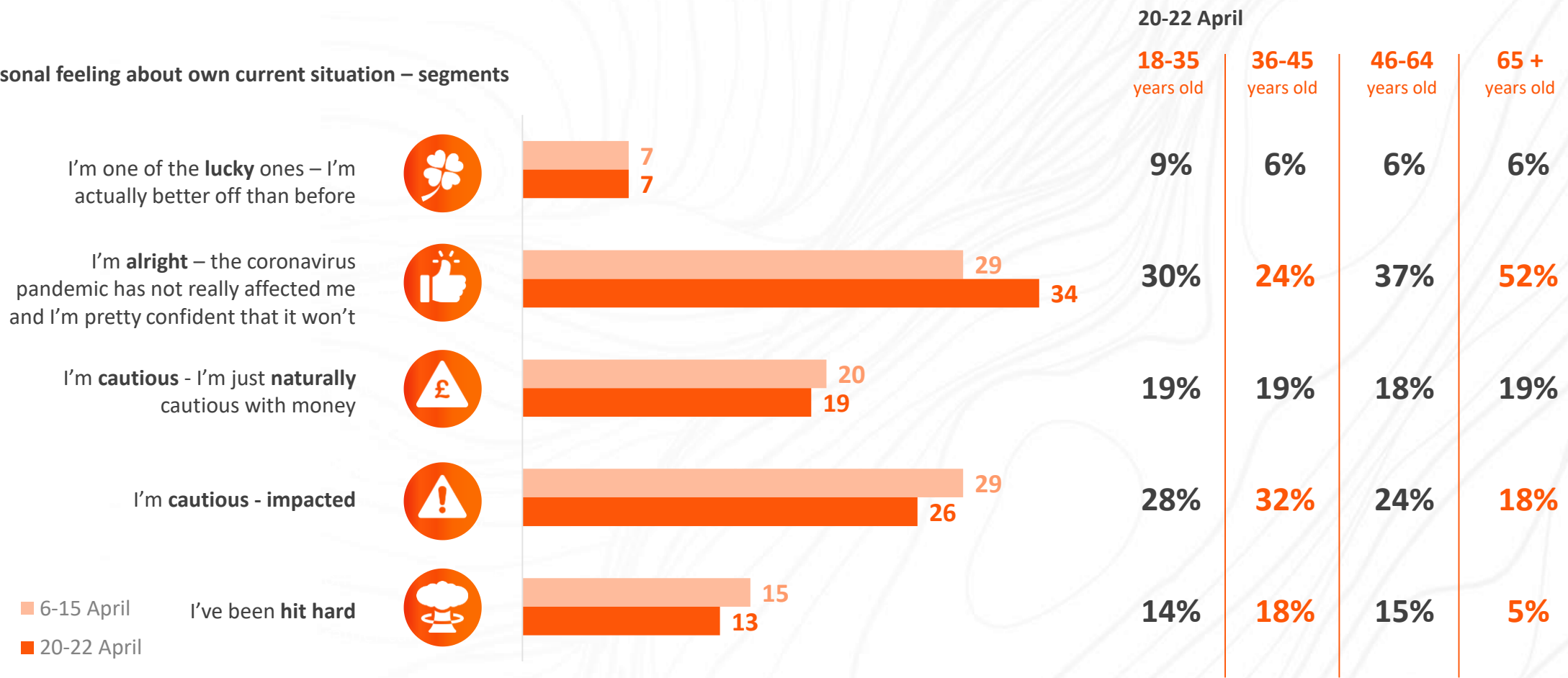
Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)
 *BVA daily tracker on how the situation is changing in France. More info, contact Adélaïde ZULFIKARPASIC (adelaide.zulfikarpasic@bva-group.com)

While we are in a better mood, our forecasts of when life will return to normal continue to edge backwards. Only 1 in 4 expect a return to normality by the end of July, down from 1 in 3.



While our financial mindsets have not changed dramatically since the start of the crisis, there has been a 5 point drop in the proportion who feel that they have been impacted, with a commensurate increase in those who feel ‘alright’.

Personal feeling about own current situation – segments

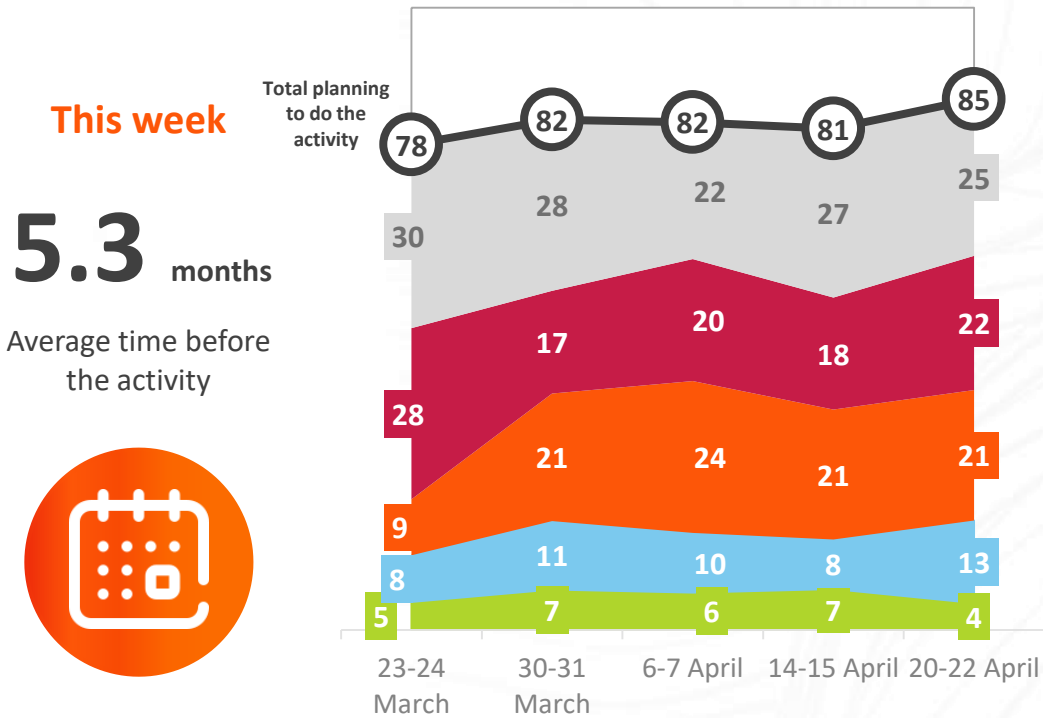


Q17: If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?
Q18: Some people are just naturally cautious with money. Others have become cautious, because of their financial situation during the coronavirus pandemic. Which one of the following best describes you?

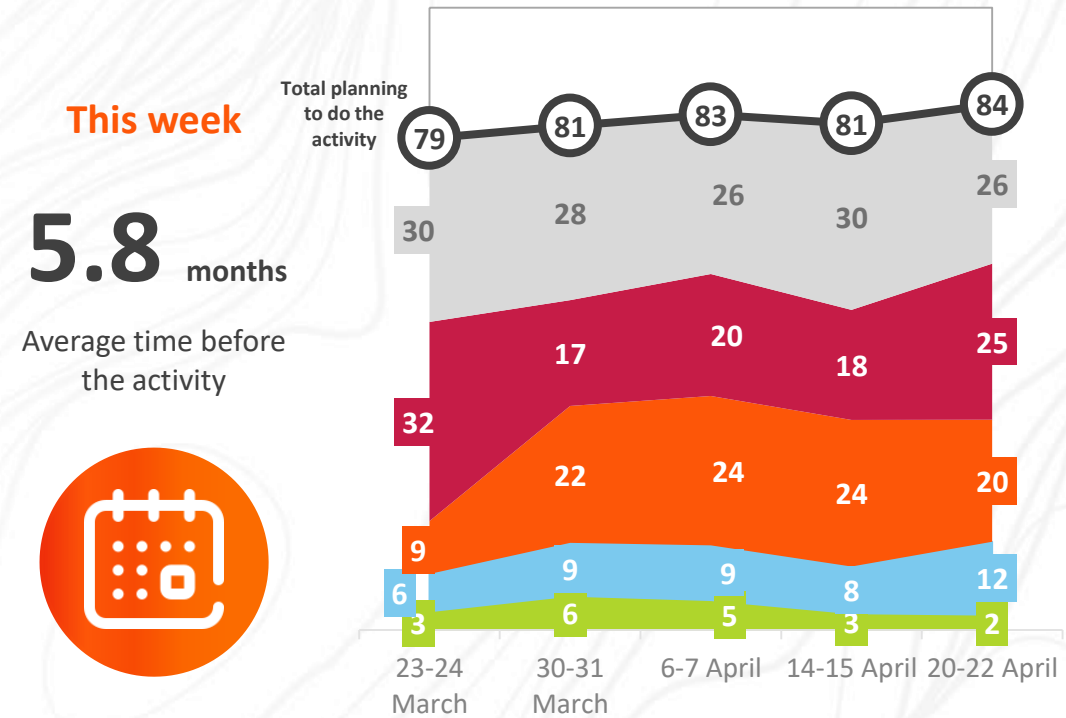
More Britons are planning a domestic holiday than in any of the previous 4 weeks

For the first time in three weeks, the proportion of Britons thinking about taking a UK holiday has increased. However, there is no evidence of summer holiday consideration rising. The average time before planning a trip is still over 5 months away. This will continue to concern visitor attractions, for whom summer domestic tourists contribute a significant part of their incomes. If the public's expectations are to change, the UK government will need to provide assurances on the type of trips that are possible, and what tourism organisations can do to facilitate them.

Plan a UK holiday



Book a UK holiday

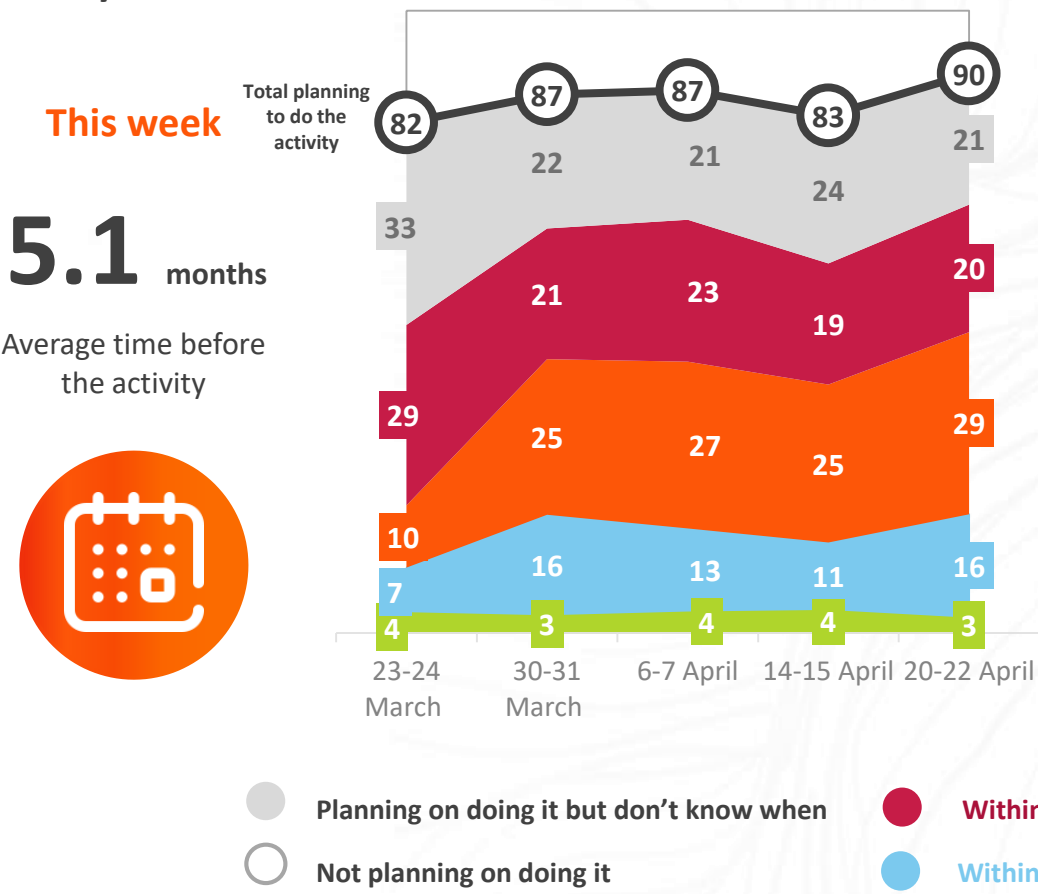


- Planning on doing it but don't know when
- Not planning on doing it
- Within the next 6 to 12 months
- Within the next month to 3 months
- Within the next 3 to 6 months
- Within the next month

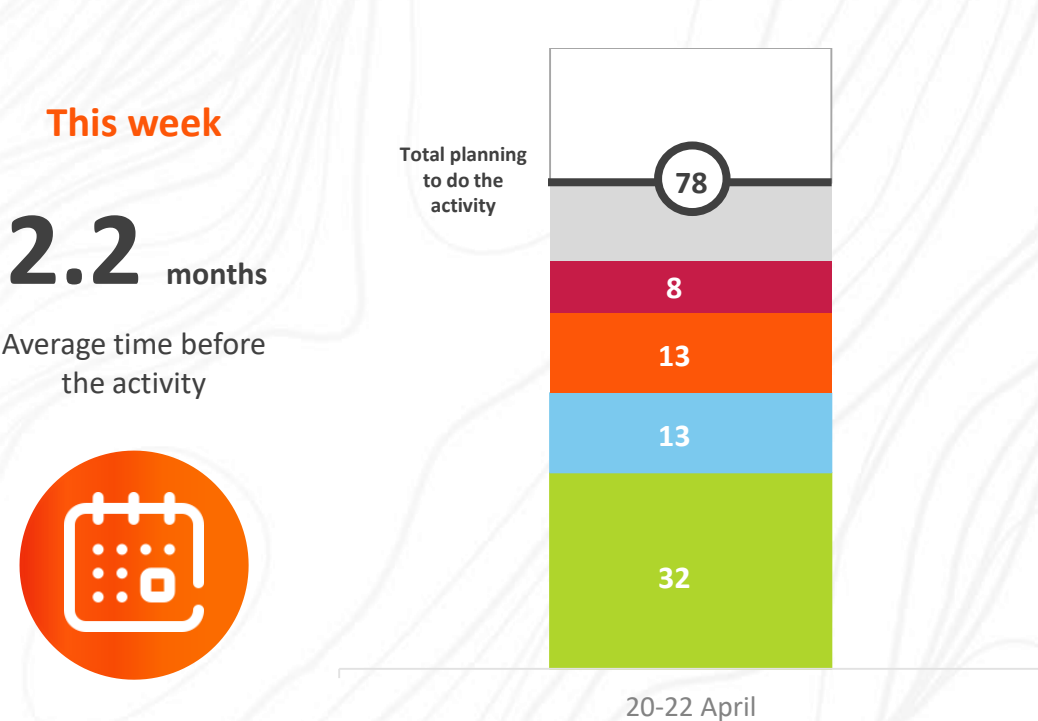
Intended usage of attractions rose to a new ‘post COVID’ high last week, but anticipated lead-times to the next visit average 5 months

Aligned with UK domestic holidays, there is an increasing appetite amongst Britons to go to a visitor attraction - overall intention and the proportion expecting to do so in the next 6 months both at their highest levels in the last 5 weeks. Continued lockdown is clearly prompting thoughts of a return to varied out-of-home activities, and visitor attractions have a strong role to play. Online content provides a meaningful stopgap for some (if not all) Britons, a third anticipating viewing content in the next month.

Go on a day out to a visitor attraction

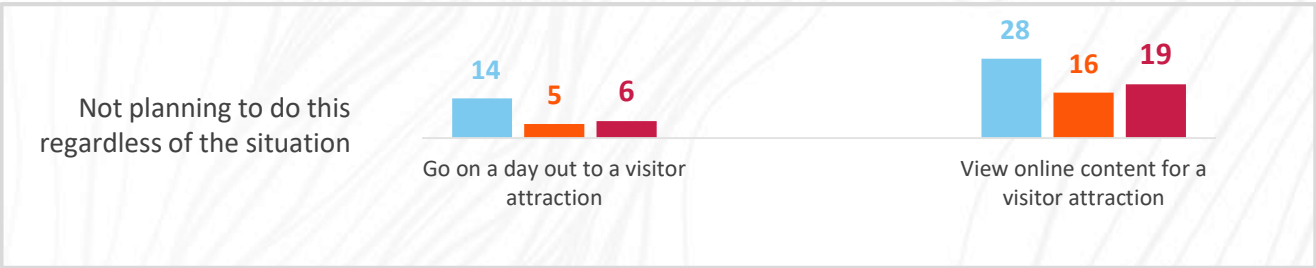


View online content for a visitor attraction

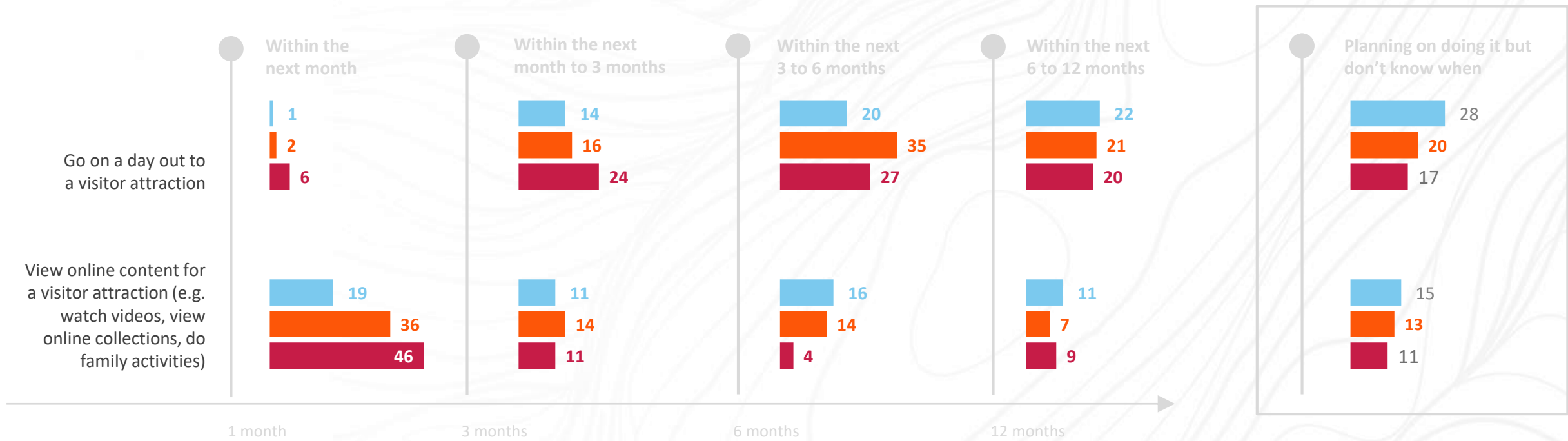


'Loyal' attractions visitors intend to return sooner rather than later

3 in 10 of frequent attractions visitors anticipate going to an attraction in the next few months. This relatively strong interest suggests a potential demand bubble, which will need to be managed to avoid over-crowding. Online content is most appealing for regular and frequent visitors, less so for occasional visitors, suggesting it is likely to reach a captive rather than a new audience.

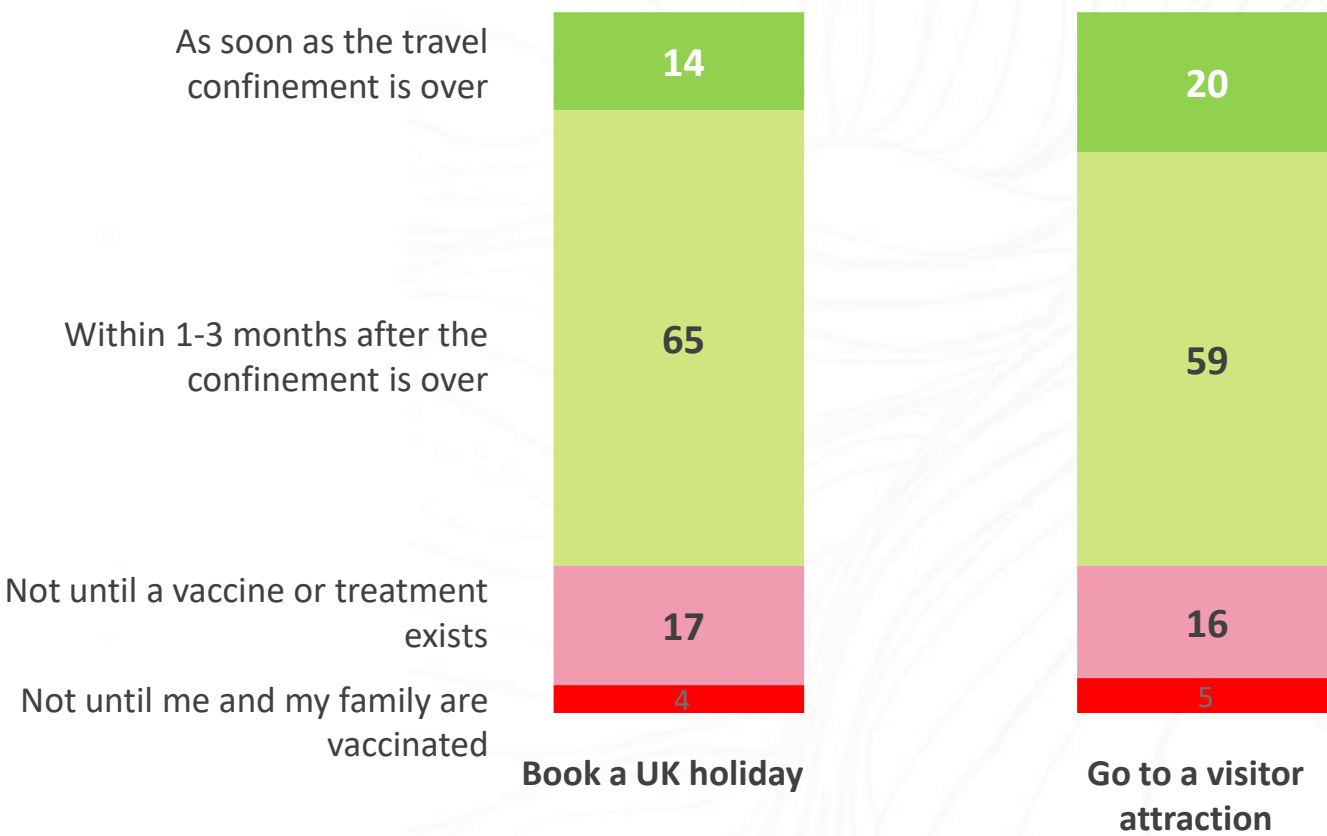


■ Occasional visitors ■ Regular visitors ■ Frequent visitors



Regardless of a high interest in visiting, 1 in 5 won't visit an attraction or book a UK holiday until a treatment or vaccine exists

The stage people will feel comfortable doing these activities again (%)

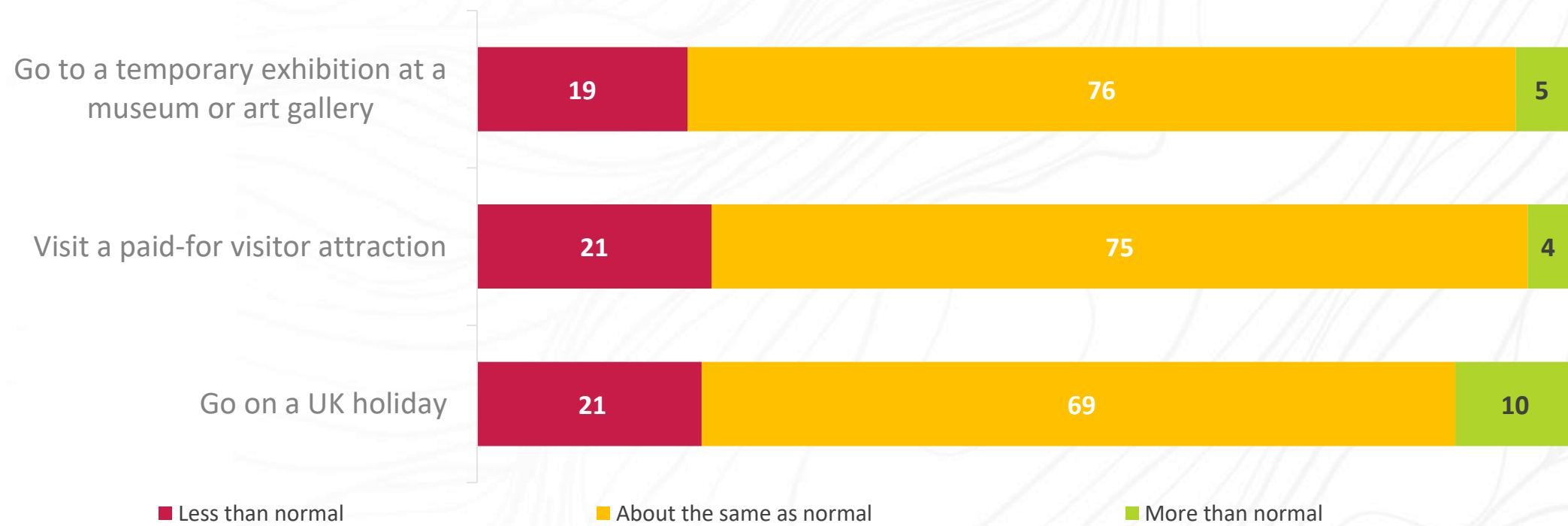


Visitor attractions and other tourism-dependant organisations may have to accept that regardless of when lockdown is lifted, a significant minority of people will not visit them until a treatment or vaccine is created. This suggests there will be a natural drop in demand for their services. However, given how congested visitor attractions and tourist hot spots tend to be during peak season, a drop in demand may not necessarily be a bad thing.

Reduced demand correlates with a net intention to pay less than normal when attractions re-open – however the vast majority would pay the same or more

Dropping prices to increase demand is unlikely to be the best strategic move. In the short term, this may increase visitor numbers which is unlikely to be well-received in the event of continued social distancing. In the medium to long term, visitors will anchor to lower prices and expect them to be maintained beyond the Pandemic. Venues would be better placed *adding value* to their experiences for fewer visitors without dropping prices. Discounts, if used at all, should be targeted and presented in the context of the full price. Venues may also want to consider providing premium/luxury content or donation opportunities for the minority that would pay more and may be feeling more altruistic following the pandemic. Although this goes against the current popular narrative, this audience does exist, particularly amongst the older age groups.

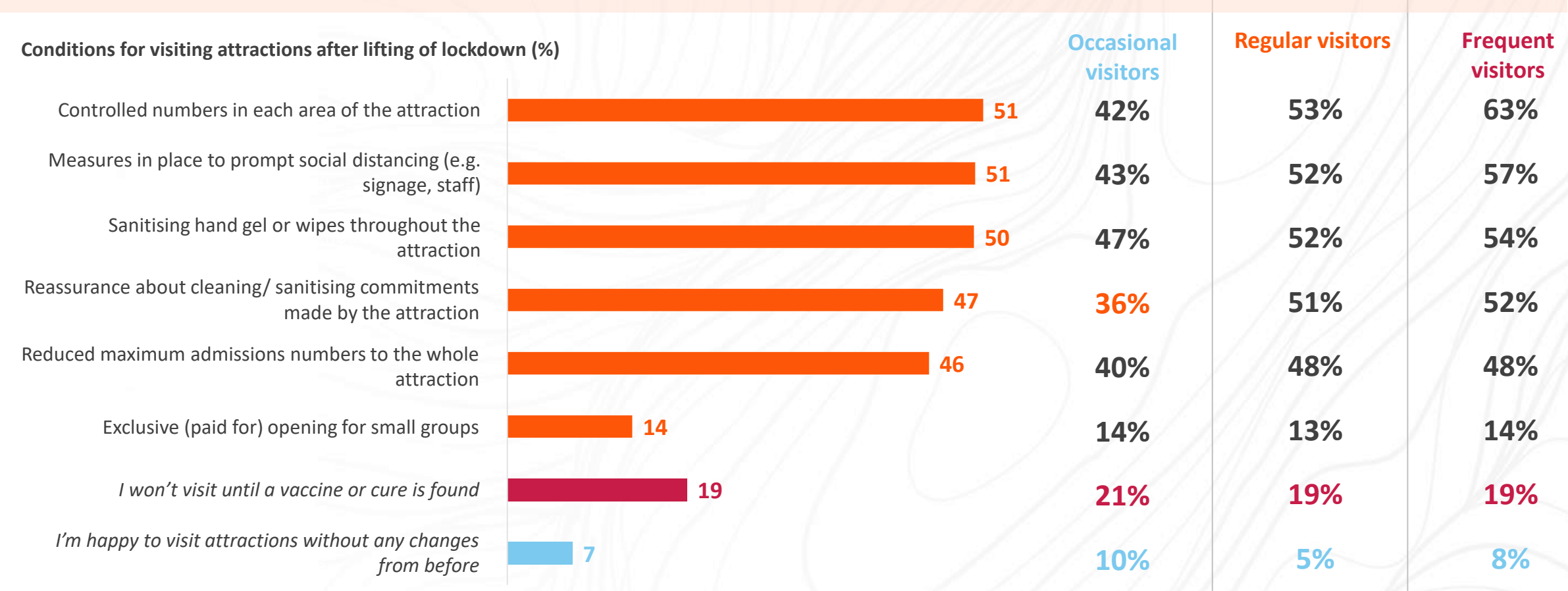
Payment expectations when lockdown is lifted (%)



Q12br Thinking ahead to when you are able to do these activities again how much more or less than normal would you pay to do them? By 'normal' we mean 'before the lockdown started in the UK'

When attractions do re-open, controlled numbers, active social distancing measures and sanitisation are among the conditions sought by visitors – with frequent visitors the most demanding

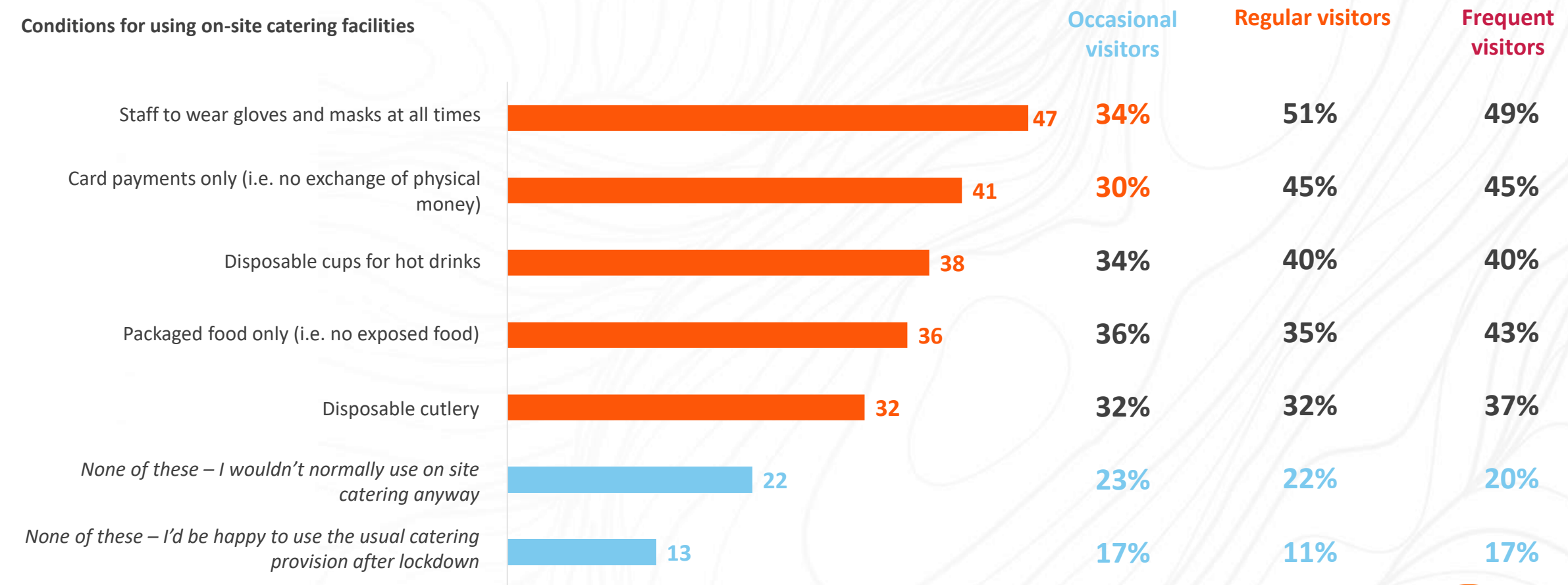
The greatest anxiety for attractions visitors is around overcrowding – half would need reassurances of social distancing and controlled numbers in *each area* of the attraction. Social distancing is particularly important for ‘frequent visitors’ who know more than most that popular parts of an attraction can become over-crowded very quickly. Museums will want to think carefully about their most popular exhibits and how to offset the gatherings of people they typically generate.



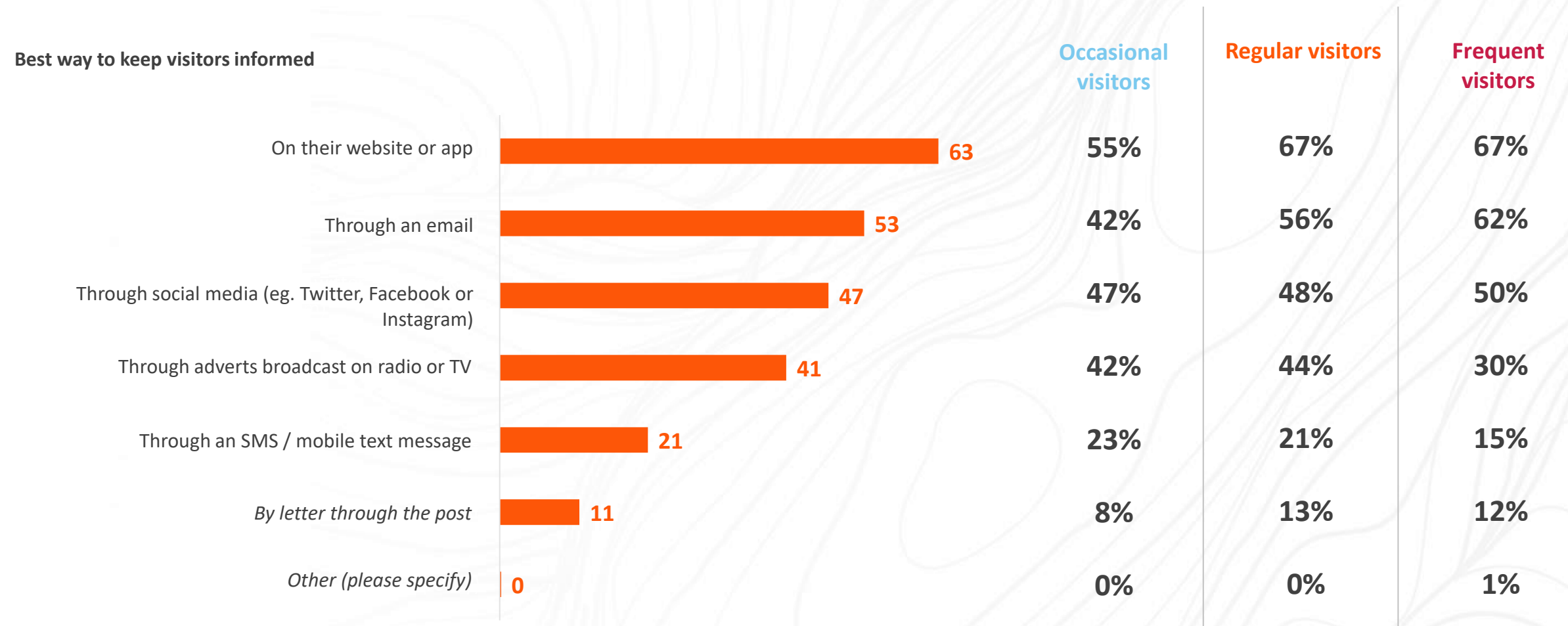
Q35: Which, if any, of these conditions would need to be met before you personally would consider going to a visitor attraction immediately after the lockdown has been lifted?

The majority of visitors are expecting at least some measures to be taken in relation to on-site catering: staff wearing gloves and masks, as well as card payment only rules are most widely cited.

The greatest concern is around the more obvious ways that the virus could spread – through staff or physical money. Disposable cups, packaged food and cutlery are not as important but would be a priority for at least 3 in 10 attractions visitors. In practice however, attractions may want to phase in measures and consult with visitors on an ongoing basis. It’s possible that visitors would be less demanding in practice than in theory, particularly if they observe good hygiene practices on site and in communications.



While the web, app, email and social media are the leading channels for keeping visitors informed about protection measures, TV and radio also have a role to play for lower frequency groups.



Between now and re-opening, digital engagement ensures attractions are front of mind: the National Trust won early plaudits after the crisis began. Here, it receives positive sentiment for its social media based Easter Egg hunt.



Indoor adventures are calling this weekend. The great Easter scavenger hunt will help you celebrate spring while staying safe at home: [ow.ly/LNO350z9USc](https://www.nationaltrust.org.uk/indoor-adventures)

Take up the challenge and see who can complete the list the fastest. [#EasterAtHome](#)

“Playing the great Easter scavenger hunt with my family across the UK via zoom @nationaltrust #findobjectstomakearainbow”

“We will miss our National Trust egg hunts this year, had great fun doing them at Sissinghurst and Sheffield Park last year! Can't wait for places to open up again. In the meantime, we have cut out egg shapes in brightly coloured card and hidden them around the house and garden for the children to find! Definitely going to do this scavenger hunt over the weekend as well. Happy Easter!”

“What a great idea, so many of us would have visited the National Trust over the Easter weekend. I will need to make some more scones to go with my virtual Easter Egg Hunt.”

“Have just laid down the challenge to our family scattered across the UK, we're going to do this with all our big teen kids over WhatsApp on Sunday!”



Join us this weekend for our virtual Easter Egg Hunt. Can you name the place where we've hidden our egg? [#JustForFun](#) Here's a clue - It was bought unseen by two brothers at auction in 1926, due to its close proximity to the horse-racing town of Newmarket!



Between now and re-opening, digital engagement ensures attractions are front of mind: Historic Royal Palaces harness the power of nostalgia to raise morale and ensure their attractions remain front of mind



Historic Royal Palaces @HRP_palaces · Apr 16

For our next LIVE quarantine Q&A tomorrow lunchtime we'll be exploring the world of historic royal fashion and the treasures of our Royal Ceremonial Dress Collection with curator Eleri Lynn 👑

Comment below with your questions and join us here tomorrow at midday!



“Thank you so much for organising this Q&A, and please thank Eleri for her time.”

“So excited!! Which of the modern royal fashion pieces in the Dress Collection is your particular favourite, and which do you think deserves more attention?”

“Thank you HRP; really looking forward to a super session from another of HRP's brilliant curators”



Historic Royal Palaces @HRP_palaces

What's your favourite #PalaceMemory? 💬

With the palaces currently closed, we're missing #PalacePhoto each week. So we'd love to see and share your favourite photos from previous visits instead! Share with us using #PalaceMemory and we'll feature a selection each weekend 📸

“Replying to @HRP_palaces
Thank you for your time Hugging face I know we've all learnt new info today Grinning face with smiling eyes I've just enrolled on the course. So excited ❤️”

“#PalaceMemory SO many to choose from (I'm a Member too!) LOVED Queen Victoria's floral spruce up for her 200th Birthday at Kensington Palace in 2019! The amazing gardens there too! And at Hampton Court Palace, some of Henry VIII's wife's get together for a natter!”

Or... #PalaceMemory of our incredible rooftop tour of Hampton Court Palace 📸, beautiful day with fantastic staff.

#PalacePhoto



Between now and re-opening, digital engagement ensures attractions are front of mind: similar to Historic Royal Palaces, Merlin has sought to remain front-of-mind by asking people to reminisce about their previous visit experiences.

The rack and touchscreen are for Haunted House Monster Party at Legoland, and the Operator Station is for Zufari at Chessington World of Adventures! I was going through photos and reminiscing!

Should have been @LEGOLANDWindsor today with family and friends as an Easter treat but the #StayHomeSaveLives message is more important right now. #EasterWeekend pic.twitter.com/LqokK86SyL

Sat in garden with a brew thinking how busy the parks would have been this weekend with this glorious weather ☹️ we miss you @THORPEPARK @altontowers @Pleasure_Beach @CWOA @LEGOLANDWindsor pic.twitter.com/YQszqR6PXo



Happy 30th birthday to our fearsome rollercoaster, VAMPIRE! Although none of us can be there in person to celebrate, we can be there in spirit... Share with us your favourite Vampire memories by replying to this post and we'll share our favourites 🎂👤📷: @Thrill_Riders)

Replying to @CWOA and @Thrill_Riders I remember when the ride opened! Now my oldest kid is the right height/age we simply cannot wait till @CWOA reopens so we can enjoy together! Happy birthday Vampire!

👉 can't wait for the next ride, looking forward to seeing the changes. It's a shame as weather has been so good this weekend. Once we're through this I'm going to sit back and hold tight....

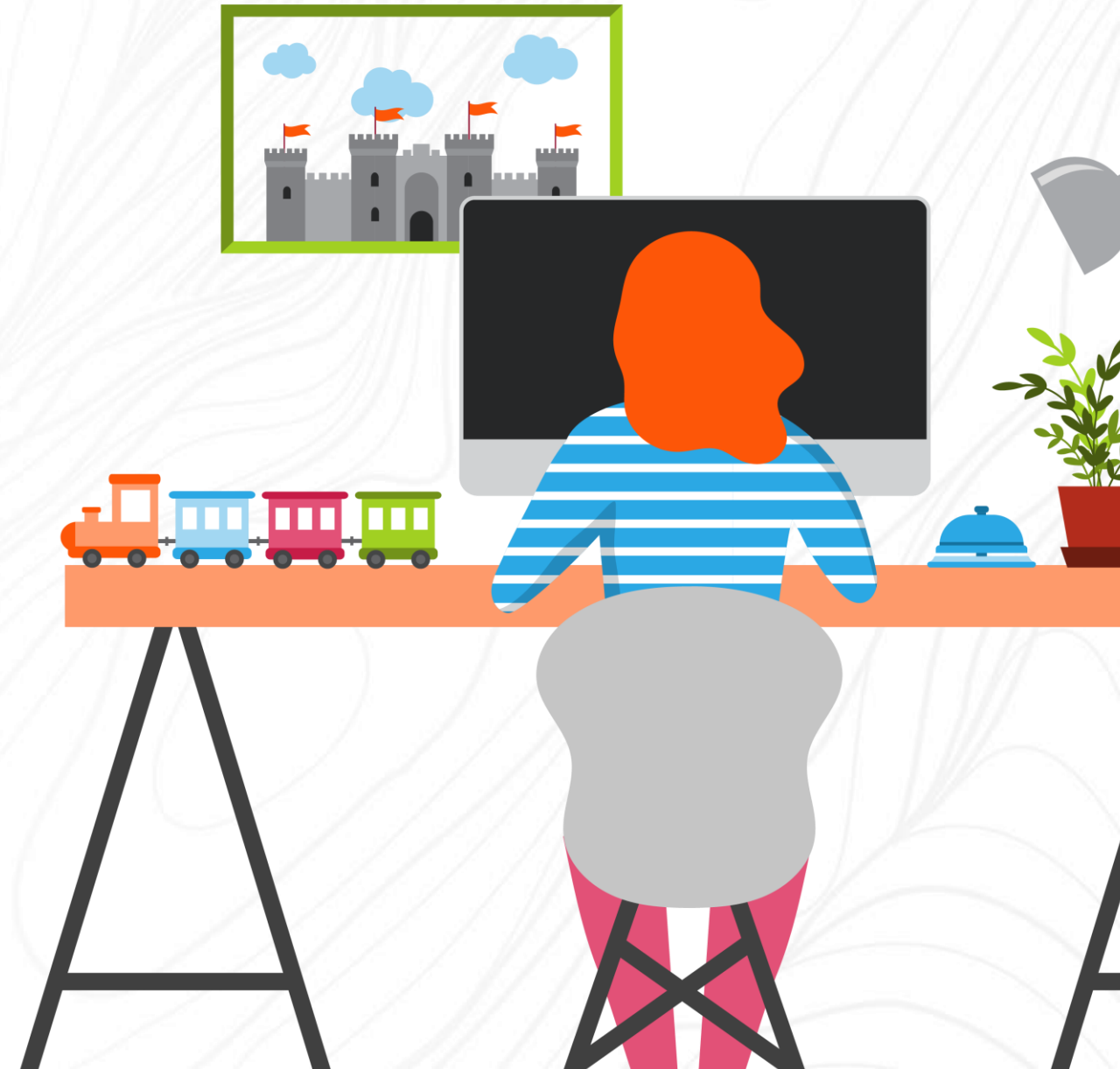
Replying to @CWOA and @Thrill_Riders I miss the vampire! can't wait to visit later this year (:



Appendix



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Methodology

Quantitative survey

Online survey amongst people who have done two of the following since the beginning of the year (01 Jan 2020):

1. Used one of the following transport mode: plane, train or bus
2. Went on a day out to a visitor attraction
3. Stayed in paid for accommodation

The survey covers all parts of the UK and is **nationally representative** on gender, age and regions.

The questionnaire focuses on understanding people's views on the coronavirus situation and the impact it has on their engagement with the transport, leisure and hospitality sectors.

This is a weekly survey capturing 500 respondents per wave.



Remember that this is also an opportunity for you and your organisation to add specific questions or to increase the number of respondents targeting your customers or specific segments. To do so, please get it touch!

Social media

With customers increasingly communicating directly with organisations and their peers through online channels, these conversations cannot be ignored in the assessment of the COVID-19 crisis on brands.

Our social analytics tool gets closer to the conversations happening in the online space, by listening to how brands are talked about across social media and how brands' reactions to the situation is viewed online. The social media analytics cover all three sectors in the UK and rigorous content cleaning and checks are set and regularly reviewed to ensure data quality. The analysis looks at conversations around the coronavirus for the past week.

Similar to the quantitative survey, social media will be analysed on a weekly basis. For this report we've examined:

- 67,252 posts for the transport sector
- 17,743 posts from the leisure sector
- 15,267 posts from the hospitality sector
- 8,061 posts from financial sector

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