WHAT DID OUR VISITORS DO OVER THE SUMMER?

ONLINE AND PHYSICAL EXPERIENCES DURING COVID-19

A different View

PRODUCED IN ASSOCIATION WITH Panelbase.com

Quality sample. Quality service.

AUGUST 2020 COVID-19 SENTIMENT

This is the forth in a series of COVID-19 reports from A Different View looking at the visitor attraction sector both in terms of consumer sentiment and ongoing online engagement.

We began researching COVID-19 sentiment in early June 2020 to provide our visitor attractions, events and art, culture, heritage market clients with insights. Obviously the insights have a short shelf life as circumstances change so our fourth report, based on a UK national study of 1,095 active visitors to festivals music venues, visitor attractions and arts and culture scenes provides a contemporary view. The data collection ended on 27th August so what you will read in the report is pretty much as up to date as can be.

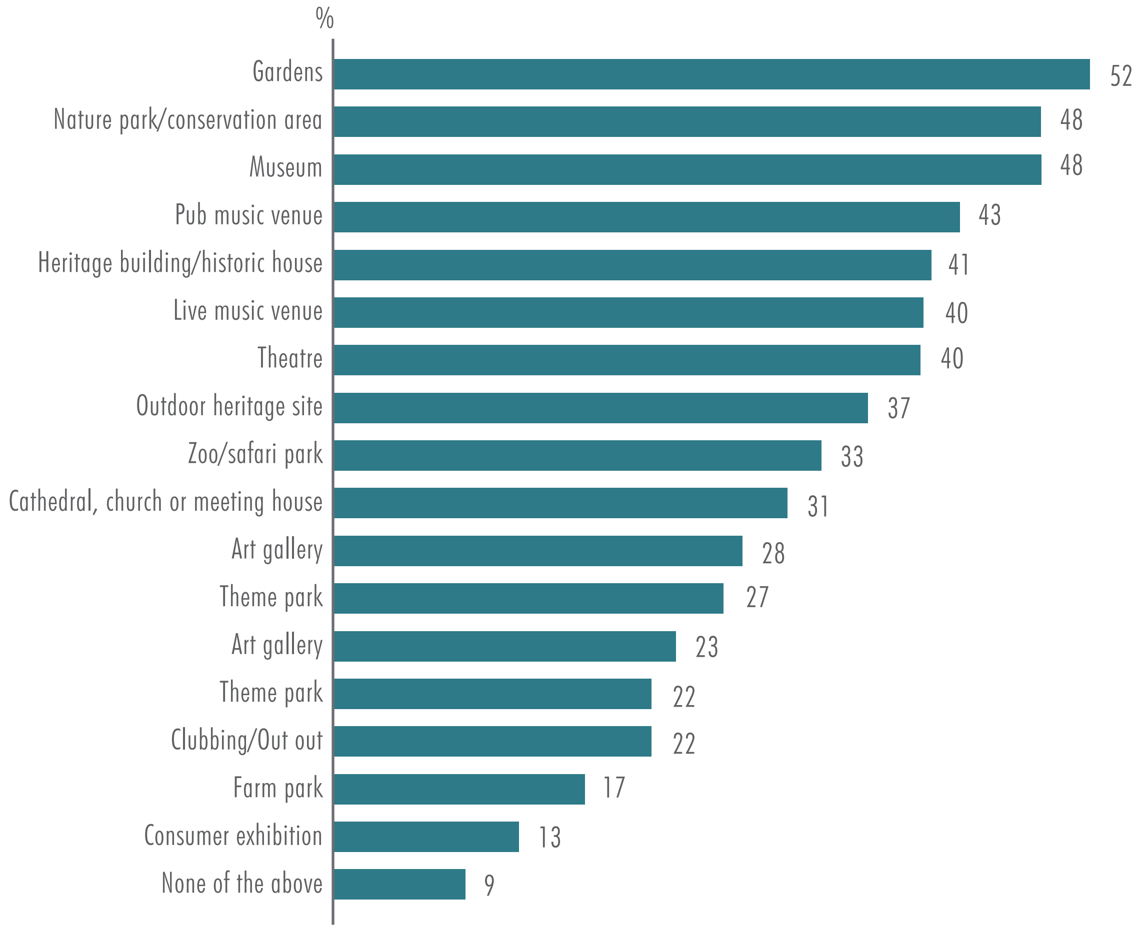
The main areas of focus in this new report are:

a. Visitor habits and sentiment over the summer as restrictions relaxed.

b. A further look at online engagement and what respondents say they will continue to engage with online even as attractions, venues and museums open.

The chart below shows where respondents had visited in the 18 months prior to lockdown. On average each respondent had been to at least 4 of the options presented below.

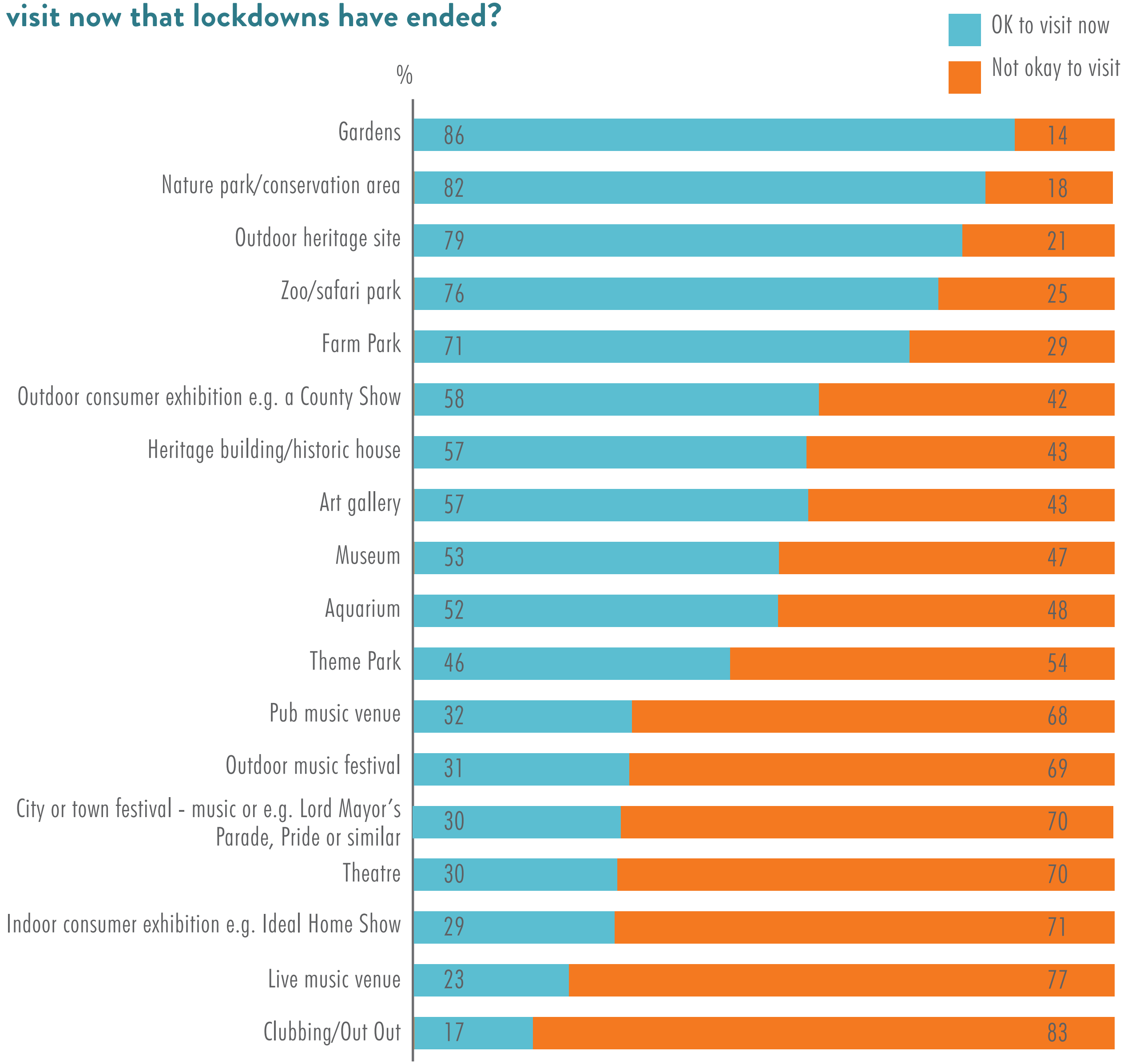
Which of these did you VISIT in the 18 months before lockdown?



What is OK to visit now?

Now we understand where people visited before Covid-19 impacted our lives, we can look at where respondents feel it is OK to visit again post lockdown. 86% believe Gardens are OK to visit where on the opposite end of the spectrum only 30% of respondents think it is OK to visit theatres; it being obviously more difficult to put physical distancing measures in place. Anything outdoors has a clear advantage.

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



Online Engagement

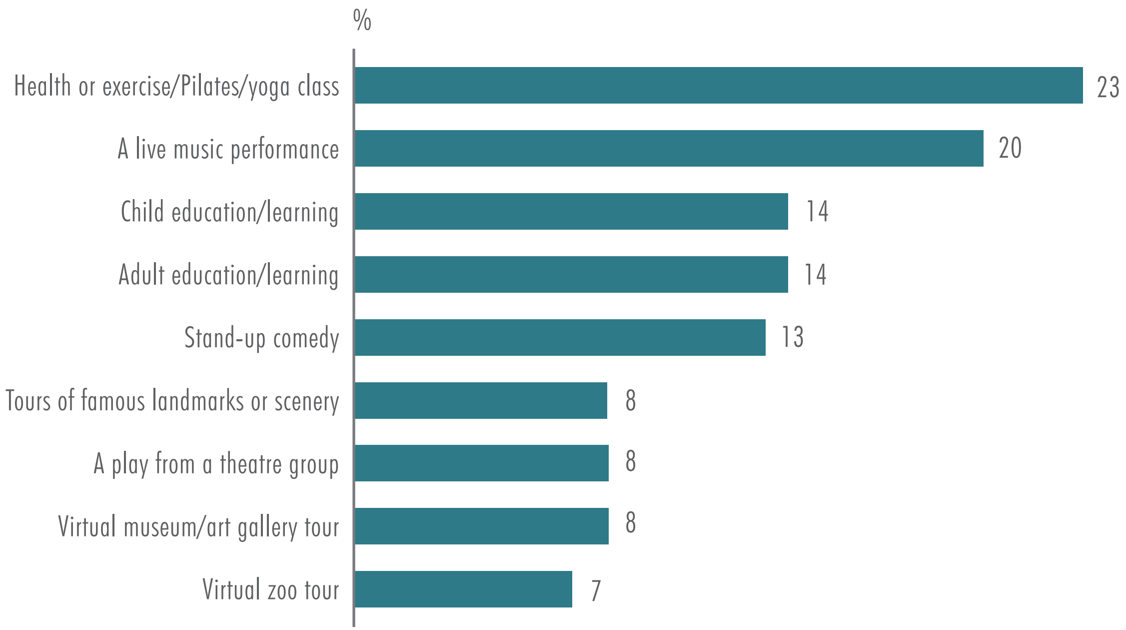
We then asked respondents what they had watched or engaged with online during lockdown. 60% of respondents had engaged with or watched at least one of the options presented, and this represents a significant proportion of the UK population. Watching online films was excluded.

The most popular online activity was ‘Health or exercise/Pilates/Yoga class’ at 23%. There were significant gender and age differences; women were more likely to participate than men (33%vs14%) and a very high 40% of 18-25 year olds compared to only 18% of the 55+ age group.

1 in 5 of respondents watched live music performances; interestingly this was consistent amongst all age groups and both genders.

The only other differences were that in both adult and child education women engaged significantly more than men.

Which of these did you watch or engage with online during lockdown?

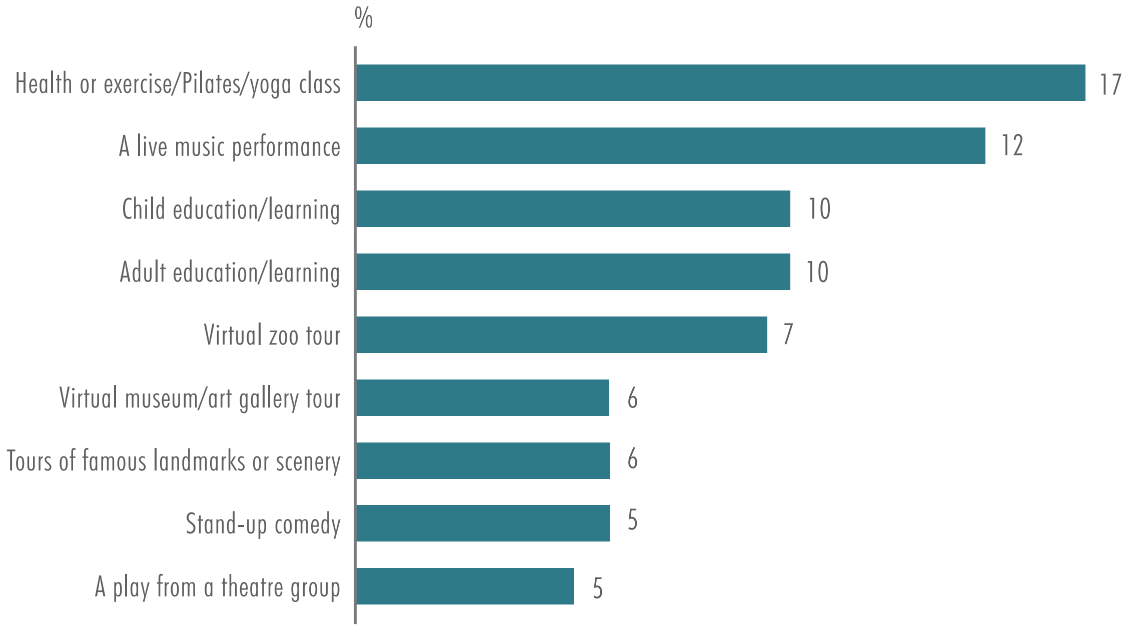


New activities

For 60% of those who had engaged with online content/performances during lockdown, the activities were new to them. The chart below shows some areas of very high new engagement like health/yoga at 17%, live music performances at 12% and child and adult education at 10% each.

As a whole in the UK activities like a 'virtual museum tour' or 'virtual art gallery tour' are lower at 6%, but when applied to the active population as a whole this represents more than one million new viewers. Live music performances could be as many as 2.5 million new viewers.

Were any of the types of entertainment or learning/participation you saw online during lockdown new activities for you?



For 74% of those who engaged in watching and learning online during lockdown, at least one of their content providers were new to them; suggesting that people are open to expanding their horizons.

Continue to watch after lockdown

Respondents were then asked of those they had watched or engaged with during lockdown.

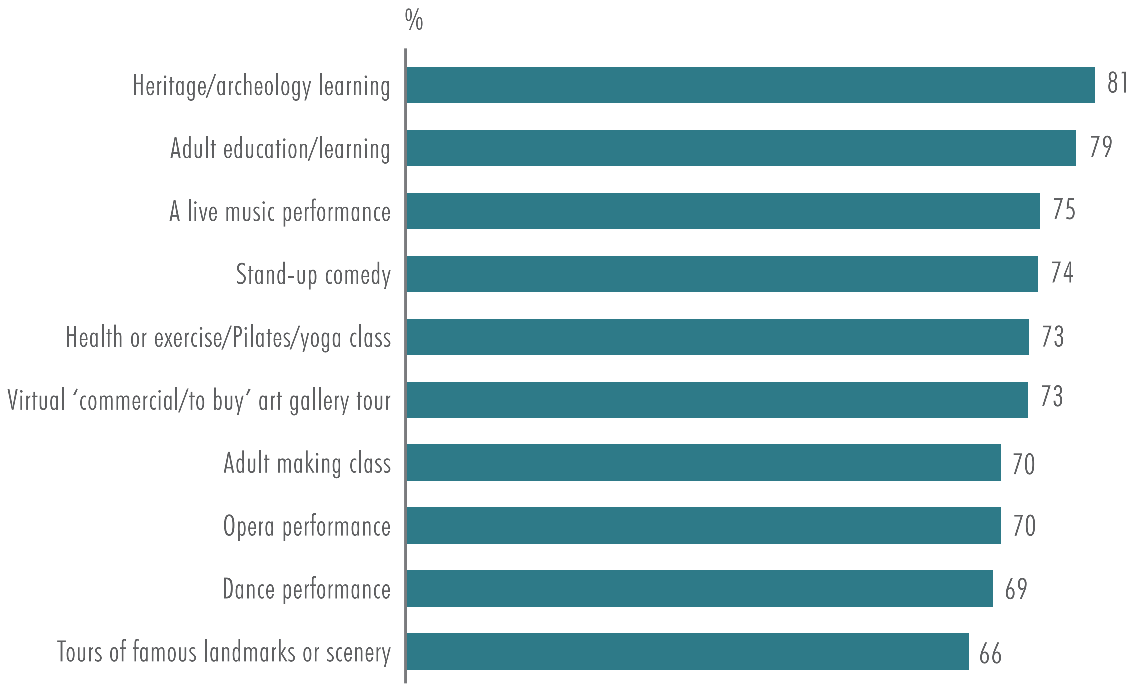
84% of those who had engaged with some sort of online education or entertainment during lockdown said that they expected to continue to do so after lockdown was lifted. Given the high proportion that had watched/engaged for the first time during lockdown, this may be considered a high level of retention.

In the chart below we can see the post-lockdown viewer retention for the top 10 activities/ engagements. In each case, a high percentage of respondents said that they would continue to view online.

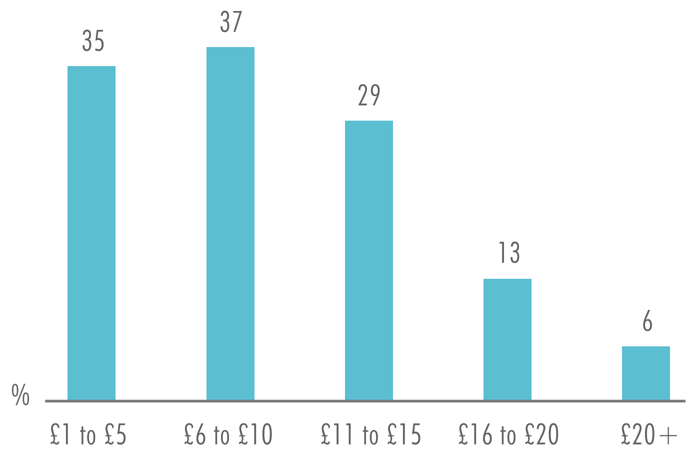
Online content pricing

1 in 4 of respondents had paid to watch/engage with online entertainment/education (apart from watching a film). This increases to one third in the 18 to 25 age group and declines to 17% for those over the age of 55. The mode average payment to watch an online session was between £6 and £10 though 48% had paid more than £11 with 6% paying more than £20.

Post-lockdown online viewer retention



Please choose each price band that you have paid to watch/engage online entertainment/education per session?



Online Subscriptions

7% of respondents said that they had 'bought a subscription for the type of online performances or services' the survey had been talking about. Without being specific, we asked if they would be more likely to buy subscriptions for a performance or service online if they were able to achieve either a 25% or a 33% discount compared to the single session price.

55% said that they would buy a subscription or would consider it at 25% discount and 63% said this when offered a 33% discount for a subscription.

We have to accept that this is very much a non-specific theoretical price test but the indication is that offering a series discount can significantly increase sales. In this example we can see that a subscription discount increases potential sales by 600% at a 25% discount, and by nearly 700% at a 33% discount.

This survey was conducted by A Different View in conjunction with Panelbase.

For further information about ADV research projects or to talk more about this report please contact:
Geoffrey Dixon, Head of Research
A Different View
+ 44 (0) 7775582305
Geoffrey@adifferentviewonline.com
www.adifferentviewonline.com

A Different View offices
For further information about ADV consulting services please contact:
UK - Rosalind Johnson, Director
Rosalind@adifferentviewonline.com
+44 (1362) 688109
USA - Sylvia Matiko
Sylvia@adifferentviewonline.com
+1 (615) 319-4942

Panelbase.com
Paul Wealleans
paul.wealleans@panelbase.com
+44 (1434) 611164

Photo credit: Front cover: © Michał Parzuchowski
Report design and layout Julie Bunting Dixon
juliebuntingdixon@gmail.com.