



COVID-19 VISITOR ATTRACTION MINDSET SURVEY

A
different
view

VISITOR ATTRACTION MINDSET



Spring 2020 has seen many countries across the world go into lockdown to help prevent the spread of COVID-19. This has presented many challenges both for individuals and organisations in the visitor attraction and cultural sector. As a Visitor Experience and Market Research consultancy with over twenty years' experience working across the Arts, Heritage, Natural Environment and Themed Entertainment sectors, A Different View (ADV) are well placed to help present a picture of how companies, organisations and individuals are reacting to closure.

With this in mind, we have conducted a survey to identify mindset, moods, anxieties and reactions across the different elements of the visitor attraction sector, exploring how they are responding to closure and how they are planning to respond to the changing world we are opening up into. This includes our Mindset Index©, which we will be sharing again to map changes in mindset over the coming months.

The survey link was shared through ADV's client base, social media channels and supported by Blooloop, Museum Development providers in the UK and the Association of Independent Museums.

The survey was live between 17th April and 10th May 2020 and attracted a total of 185 respondents.

THE SURVEY: AN OVERVIEW

The focus of the ADV Covid-19 Impact Survey is to explore the mood of 3 broad visitor attractions sectors and supporting freelancers and suppliers:

In total, 185 respondents took part in the survey:

- Cultural sector 33% - museums and heritage, arts, historic houses and gardens
- Themed Entertainment 20% - theme parks, family entertainment centres, farm park and water parks
- Outdoors and Conservation 15% - outdoor and conservation, zoos and aquariums
- Supporting Industries and Freelancers 33% - freelance/independent consultant, suppliers.

Geography

Most respondents are from the UK, 49%, and the US, 43%, with a smattering from Canada, Singapore, Italy and the Middle East. Throughout the report we will look at UK to US differences.



Visitor Attractions

Our survey has focused on exploring mood and change across the visitor attraction sector with reference to funding and delivery, and importantly, has measured levels of anxiety and optimism regarding the immediate situation and the future. What is clear is that across all sectors, many are still wondering how to react, with many also wondering if they can survive. This is particularly true of the Themed Entertainment sector, where more respondents are concerned about overall survival in comparison to the Cultural and the Outdoors and Conservation sectors.

In looking to survive, it is no surprise that a high proportion of visitor attractions have applied for agency funding. In the UK this has come from funders like the National Lottery Fund for Heritage, Arts Council, and direct government schemes such as furlough payments. In the US, the Federal CARES Act is supplying funding and interest free loans, with other state agencies also offering some relief. Interestingly, organisations responding from the US are twice as likely to be seeking funding from agencies than those in the UK.

It is also not surprising that respondents to the survey see that Covid-19 is likely to influence change, with three quarters of all visitor attractions taking part saying they expect to either see some change, or to become very different as a result of the pandemic. This pattern is seen across the US and UK. Interestingly, within this, all respondents from the Outdoor and Conservation sector expect changes in how they operate.

Online content is an area where respondents anticipate seeing significant changes. If we take 'family activities and games', for example, it can be seen that 76% of those in the Cultural sector are planning to deliver this kind of online

content, compared to 26% that are currently delivering in this area. The same is true in the Outdoor and Conservation sector, where 36% of respondents are currently delivering online 'family activities and games', with 82% planning to be. A similar pattern is also seen in the Themed Entertainment, although to a lesser degree. It is also interesting to note that an anticipated growth in online engagement is seen across the UK and the US.

A key aspect of this survey was to investigate levels of anxiety and optimism across all sectors regarding the future. Severe anxiety about organisation future peaks at 43% with respondents from Themed Entertainment; this sector has also accessed less funding. Interestingly, in the UK, 42% of respondents across all sectors expressed severe anxiety about the future of their sector as a whole, compared to 28% in the US.

It is not surprising to note that this survey found overall levels of optimism are low, particularly in the short to medium term until the end of the year. But encouragingly, optimism increases across all visitor attraction sectors when looking at 2021. It is also interesting that significantly more US based respondents express high optimism (54%) than UK based respondents (25%) about the longer term recovery into 2021.

More Commercial companies express a high optimism about 2021 (45%) compared to the Not for Profit sector (34%). Higher footfall/attendance attractions (+500k) express higher optimism (52%) than those with less than 500k (31%), although a greater proportion of smaller organisations say they have accessed external funding support and have endowments. In each area of segmentation, though, a majority express positive optimism when we combine high and moderate optimism outlook into the longer term of 2021.

Supporting industries: freelancers, consultants, and suppliers

Almost all freelancers, consultants, and suppliers have experienced a negative impact to their business or work since lockdown (96% in the UK and 83% in the US), resulting in 92% of UK respondents and 53% of US respondents losing between 20% and 100% of their income.

In each case, a majority of freelancers, consultants, and suppliers are focusing on minimizing costs, tightening belts and adapting to new types of work. It is interesting to see that US respondents are twice as likely as UK respondents to be increasing self-promotion (55% vs 25%).

Freelancers, consultants, and suppliers are anxious about their earning capabilities with 42% of US respondents expressing severe anxiety and 36% in the UK. When looking at levels of anxiety about 'your future', 'the future of your sector' and 'your Covid -19 resilience strategy', we see severe anxiety levels from around 26% to 32% of respondents, with severe to moderate anxiety expressed by around three quarters of respondents in each case.

The majority of freelancers, consultants, and suppliers express low or no optimism about the short-term through to June, but this changes to a majority expressing moderate optimism for June to December and then high optimism expressed for the longer term into 2021.

Over the coming months A Different View will be releasing more research and think pieces. Please leave your contact details here http://www.adifferentviewonline.com/mindset_survey/ if you would like to receive those reports and if you would like to take part in future surveys.

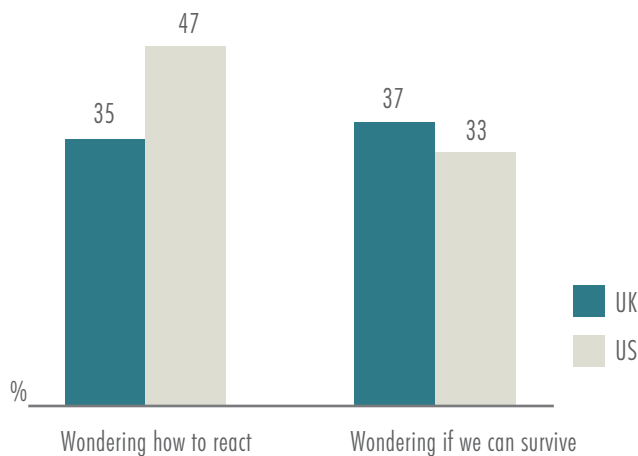
MOOD AND CHANGE

Many working across all sectors are still in thinking mode about what the future holds:

Which of these describes your organisations mood at this time?

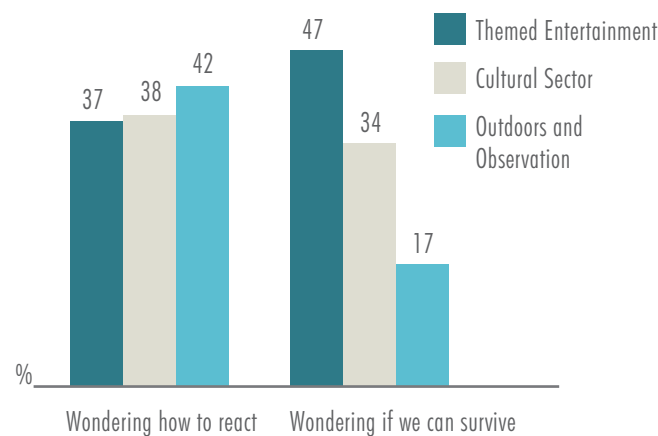
Wondering how to react	39%
Wondering if we can survive	34%

Mood and change by geography



In the US we can see that respondents are saying that they are more likely to still be wondering how to react but a similar one-third wondering if they can survive.

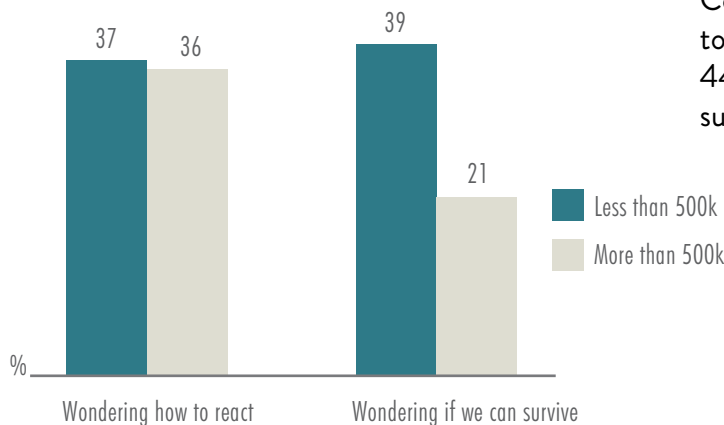
Mood and change by sector



All sectors are showing a similar rating for 'wondering how to react'. Themed Entertainment are more likely to be wondering if they can survive and Outdoor and Conservation sector is showing the least concern, though even here nearly one in five are not sure where they stand.

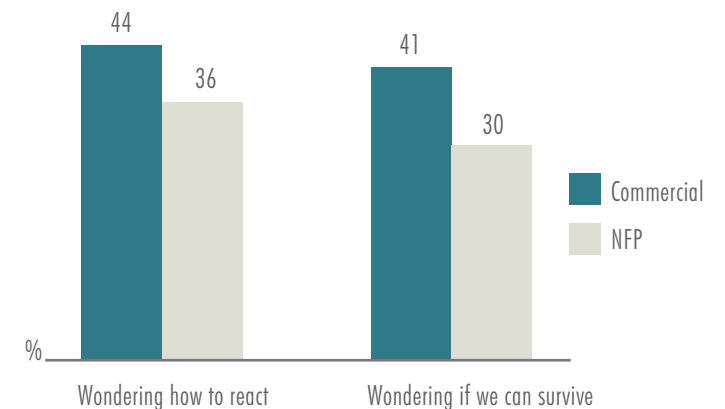
Mood and change by footfall/attendance

Looking at the data by the size of organisation expressed by number of annual visitors.



We can see again that just over one-third are wondering how to react but the big difference is that smaller organisations with an attendance of less than 500k visitors are twice more likely than the larger, more than 500k visitor organisations, to wonder if they can survive.

Mood and change by Commercial vs Not for Profit



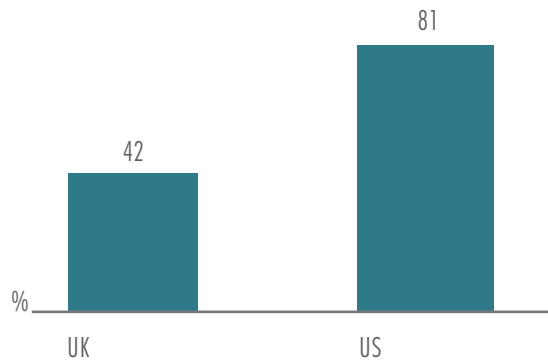
Commercial attraction companies are more likely to be wondering how to react than Not for Profits 44% vs 36% and to be wondering if they can survive 41% vs 30%.

APPLYING FOR FUNDING

With high levels of concern over survival we can see that many have been applying for agency funding.

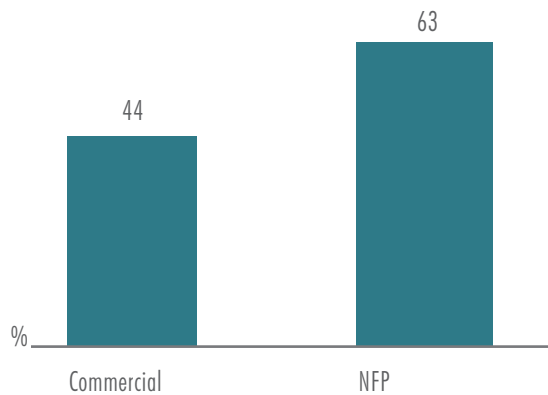
Applying for funding by Geography

It is clear that US respondents are twice as likely to be seeking funding from agencies than those in the UK.



Applying for funding by Commercial vs Not for Profit

We can see that the Not for Profit sector is significantly more likely to be seeking funding than Commercial companies.



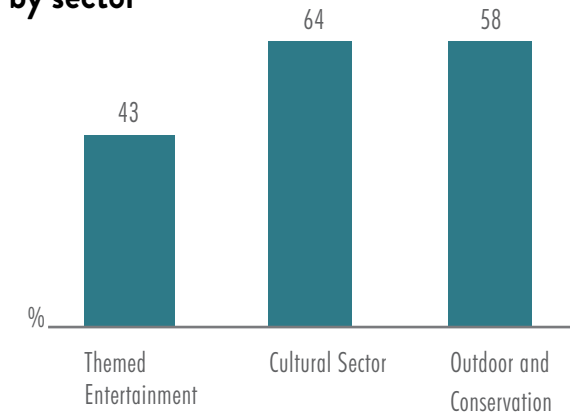
We can also see that 63% of the Not for Profit sector and 44% of Commercial respondents have applied for funding from agencies. Across the UK major funders such as the National Lottery Fund for Heritage and the Arts Council have supported organisations with emergency funding packages for the Not for Profit sector and for the Commercial sector this is likely to reflect furlough payments and grant funding.

In the US, the Federal 'CARES Act' has supplied funding and interest free loans to organizations that meet certain criteria. Alongside this Federal funding, other agencies are also offering some relief.

There is a major but not surprising difference between the Commercial and Not for Profit sectors relating to 'endowments and donor funding', with only 3% of the Commercial sector having access to these funds compared to 34% of Not for Profit organisations.

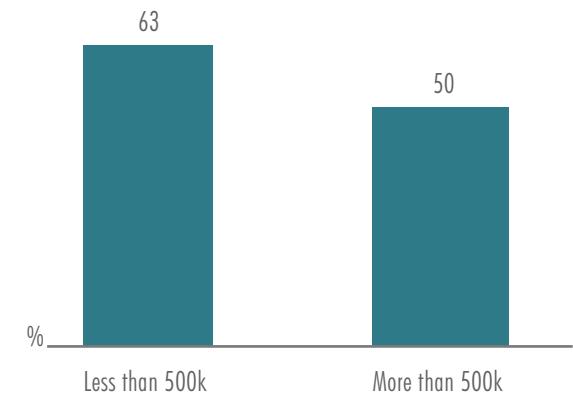


Applying for funding by sector



The Cultural and Outdoor and Conservation sectors can be seen to be more engaged with applying for funding from agencies than Themed Entertainment but even here a high 43% are applying to agencies.

Applying for funding by footfall/attendance



Larger organisations with an annual footfall/ attendance of more than 500k were less likely to be looking for agency funding (50%) compared to smaller ones with a footfall of less than 500k (63%). This is likely to reflect the lower proportion of agency funding we saw earlier for Themed Entertainment.

Themed Entertainment

Overall, the data shows that commercial Themed Entertainment organisations with a larger footfall are applying for less agency funding and are less likely to have grant or government funding in place supporting survival compared to the Not For Profit sector.

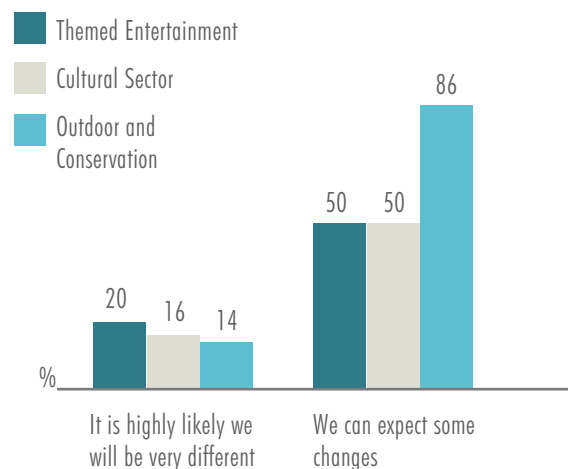
They are also less likely to have grant funding in place supporting survival compared to the Not for Profit sector (12% v 27%).

Will your organisation look different after lockdown?

It is highly likely that we will be very different	17%
We can expect some changes	58%

Most feel that their organisations will undergo at least some change post lockdown and nearly one in five expecting to be very different.

Post lockdown change by sector



Perhaps most striking was the Outdoor and Conservation group who were significantly more likely than other attraction groups to expect to see change.

Of course many in the Themed Entertainment and Cultural sectors also have open-air spaces, and we could consider that managing outdoor spaces post lockdown would be easier than managing inside spaces (galleries/museums), or spaces where the focus is on physical interactivity (Themed Entertainment).

What are they saying about change in the Outdoor and Conservation sector?

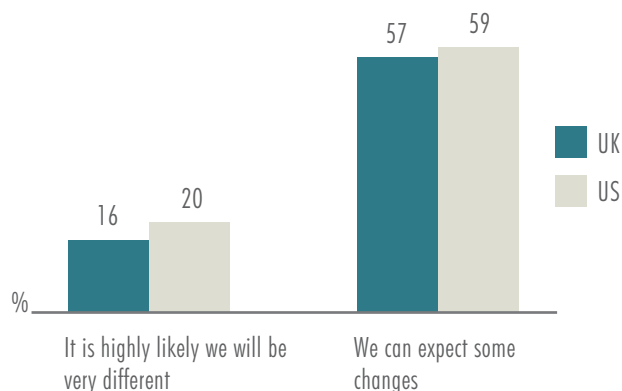
“We will have lost several months of our highest ticket sales. When we do reopen, we will have a limit on how many people can be here at one time. We will most likely have to have lay-offs.”

We will have to change many normal procedures to accommodate a touchless experience.

We have significantly ramped up our social media and virtual programming and options. We have been forced to think out of the box and pull together our creative energy to do so and have come up with some fun changes by doing so. We may find some things work better than the “old ways” of doing things and decide not to return to them. Ultimately we will come out stronger as a new version of our organization.

As we are mostly an open air facility, we will mostly look different where crowds gather, gate, gift shop, food and beverage, reduced attractions but our big draw is animal exhibits that shouldn't change.”

Post lockdown change by geography



On balance we can see that more US respondents feel that their organisation will look different after lockdown but the differences are not significant.

What are they saying?

UK

“We think that our real funding crisis will come further down the line when the emergency funding is no longer available. We are looking at ways to diversify our income streams - we were already looking at this through a Resilient Heritage Bid but we now anticipate greater pressures if our endowment income continues to fall.

We have some reserves but they won't last into 2021 and we'll be in big trouble if lockdown continues, or comes in waves. We're investing in digital at the moment which I hope will continue when we get back.

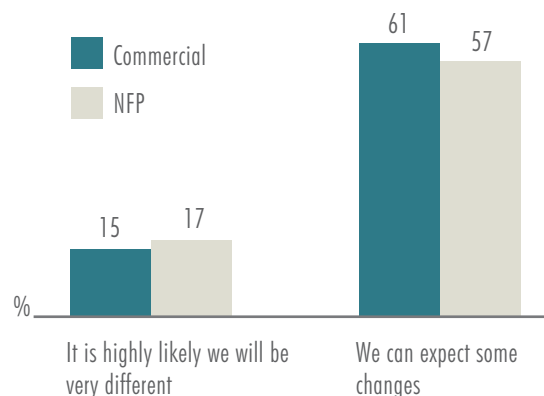
I also wonder whether we'll restructure to support future finances and because this period has strongly highlighted gaps in our practice.”

US

“Because I'm really not sure how it will impact us long term. The economic picture will determine how our endowment will fare as recovery takes place.

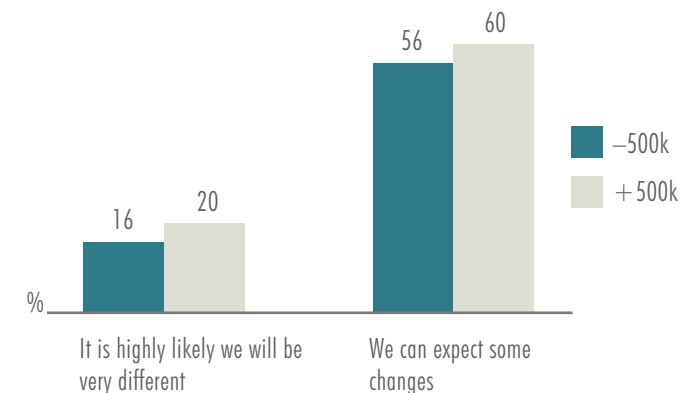
Social distancing measures, touchless transactions and other precautionary guidelines will be in place but otherwise I believe once we can re-open we will be the same in the long term.”

Post lockdown change by Commercial vs Not for Profit



The Commercial and Not for Profit sectors are equally likely to expect changes in how they work.

Post lockdown change by footfall/attendance



The majority of less than 500k footfall/attendance organisations and those attracting more than 500k visitors expect to experience change with larger organisation more likely to.



What sort of ONLINE experiences did you provide before the lockdown, since the lockdown and/or are planning to introduce?

The survey asked about online experiences offered to audiences. Respondents were first asked about what they offered online before lockdown, what they had introduced since lockdown began and what they planned to introduce.

They were asked about 6 areas of online activity:

- Performances
- Live events
- Formal learning programmes
- Virtual tours and experiences
- Things to do classes – making, creating exercising
- Family activities/games

As we would expect, many were delivering online experiences before lockdown but there are major sector differences. In each case we show the percentage that were active before lockdown and the percentage in each sector for how they plan to be.

Online experiences by Sector (%)

	Themed Entertainment		Cultural Sector		Outdoor and Conservation	
	Current	Plan to be	Current	Plan to be	Current	Plan to be
Family activities and games	23	30	26	76	36	82
Things to do classes	17	27	26	74	32	68
Virtual tours and exhibitions	10	27	24	64	23	68
Formal learning programming	17	20	32	62	27	59
Live events	17	23	22	60	18	45
Performances	20	23	20	40	14	32

We can see that Cultural and Outdoor and Conservation sectors were more active than Themed Entertainment in providing online content to their audiences before the lockdown and the Themed Entertainment sector companies are also less likely to have developed or are planning to develop online content. For example, we can see a very high 192% increase in ‘family activities and games’ in the Cultural sector.

Online experiences by Commercial and Not for profit (%)

	Commercial		Not for profit	
	Current	Plan to be	Current	Plan to be
Family activities and games	18	30	32	80
Things to do classes	15	30	29	72
Virtual tours and exhibitions	12	30	23	65
Formal learning programming	18	21	30	62
Live events	15	21	22	58
Performances	18	21	19	39

In general, fewer Commercial companies were delivering online content in comparison to the Not for Profit sector prior to lockdown and it is the Not for Profit sector that appears to be significantly increasing its online content delivery.

Online experiences by location (%)

	UK		US	
	Current	Plan to be	Current	Plan to be
Family activities and games	33	71	24	63
Things to do classes	25	67	29	59
Virtual tours and exhibitions	20	51	24	63
Formal learning programming	25	39	34	71
Live events	25	49	15	49
Performances	16	29	24	44

There is a similar pattern of growth in online content, development and delivery between the UK and the US with a majority of visitor attractions providing online content in 5 out of the 6 categories presented. Even at the lowest level of overall engagement the proportion providing access to ‘performances’ has close to doubled in both countries.

What are they saying?

“A digital resource centre, which will basically be a dynamic platform for online content that sits a bit separate from our website (which is mainly for practical information like opening times). It was in our strategic plan but this period has forced us to focus on this work. We’ve also launched a website that’s an online exhibition of one of our physical exhibitions, featuring editorial and video content. We’re also writing a new digital strategy to ensure our new work is as well thought through as possible and not just randomly throwing digital stuff out there.”

Have continued to add to our extensive library of online resources. During temporary closure, new webcast schedule offers three new programs each Tuesday and Thursday. Also, have increased amount of social content shared each day.

Nest cameras were part of our project funding and broadcasting live feed in Y2 of completion has moved up the priority list to engage with our audience.

Online learning platform, videos and interactions through social media, live talks with tank cams, virtual summer camp & field trips.”



ANXIETY AND OPTIMISM

The survey explored how anxious or optimistic organisations are feeling and all respondents were invited to answer the following questions using a sliding scale of anxiety and optimism, where 10 was high and 0 low:

Anxiety

- Anxiety about your organisation’s future
- Anxiety about the future of your sector
- Confidence in your organisation’s Covid-19 resilience strategy

Severe anxiety is defined as 8, 9 or 10 ratings and, in each case we show ratings as percentages.

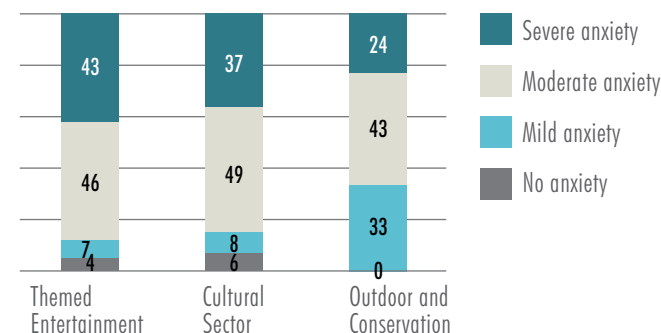
Vulnerability, organisations future and Covid-19 resilience strategy

Having explored how vulnerable participating organisations feel in terms of survival and access to financial support, it is interesting to view these concerns expressed levels of anxiety around confidence in their Covid-19 resilience strategy and perceptions of their organisation’s future.

The data suggested that respondents in commercial, Themed Entertainment sectors and those with attendances greater than 500k are feeling more vulnerable and potentially have less access to financial support or back-up.

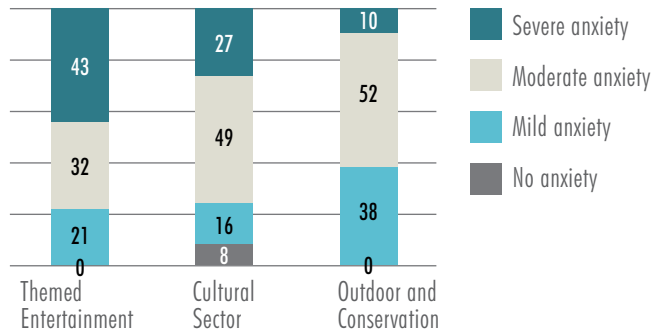
Despite this, respondents from Themed Entertainment are feeling less anxious about their Covid-19 resilience strategy compared to those in the Cultural and Outdoor and Conservation sectors.

Anxiety segmented by Attraction Sector



Most respondents are anxious to some degree. Those in Themed Entertainment are significantly more anxious with close to half expressing severe anxiety, closely followed by the Cultural Sector with just over one-third expressing severe anxiety. The Outdoors and Conservation sector shows lower anxiety but even here one-quarter of respondents feel severe anxiety. The proportions expressing moderate anxiety is similar across all sectors.

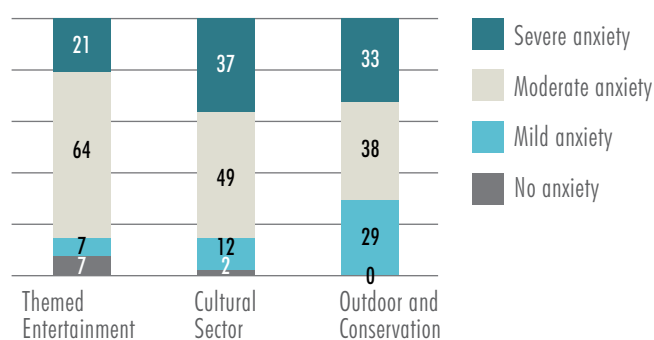
Anxiety about your organisation's future by Sector



The Outdoor and Conservation sector has a significantly lower anxiety about the future than the Cultural Sector and in particular the Themed Entertainment sector where a very high 43% say they feel severe anxiety about what the future holds.

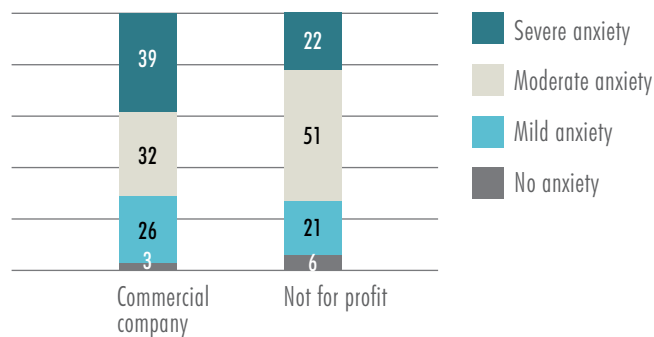
The lower levels of anxiety in the Outdoor and Conservation sector may reflect a general feeling that the Outdoors has become highly valued by the public as they have been largely homebound during lockdown. Also, based on these survey results this may in part reflect the way the sector has adapted during the Covid-19 crisis, by significantly increasing delivery of online content.

Anxiety about your organisation's Covid-19 resilience strategy by Sector



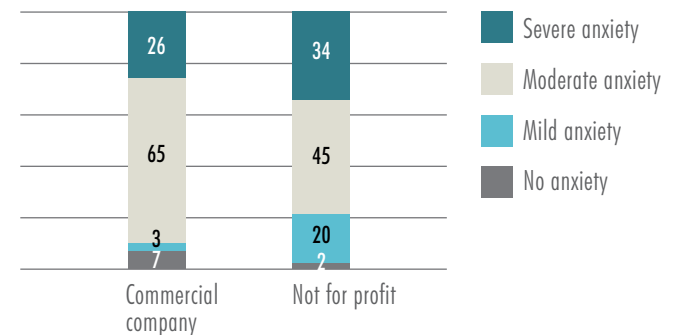
Here we see a change and the Cultural and Outdoor and Conservation sectors showing similar levels of severe anxiety about their Covid -19 resilience strategy. We can see a minimum of 70% of respondents in each saying they have severe or moderate levels of anxiety.

Anxiety segmented by Commercial vs Not for Profit



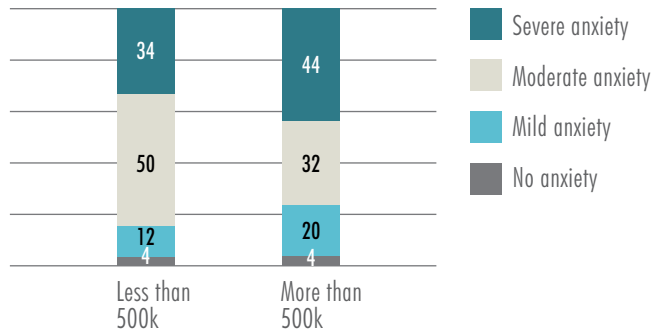
Reflecting on what we said earlier, Commercial organisations are experiencing a higher level of severe anxiety around their future, though when we combine severe and moderate both the anxiety levels are similar.

Confidence in your organisation's Covid-19 resilience strategy by Commercial vs Not for Profit



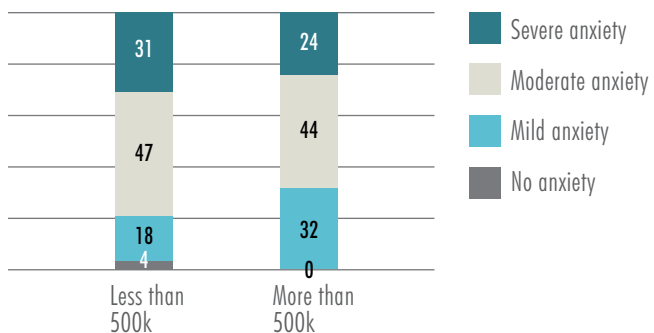
The Not for Profit sector has registered a higher level of anxiety over their organisations Covid 19 strategy than Commercial companies.

Anxiety about the future of your sector by footfall/attendance



When we look at levels of anxiety about the future of 'your sector' by the footfall/attendance levels we can see a higher level of severe anxiety in the higher footfall/attendance sector but when we combine moderate and severe anxiety levels the we find a greater level of overall anxiety amongst smaller attractions.

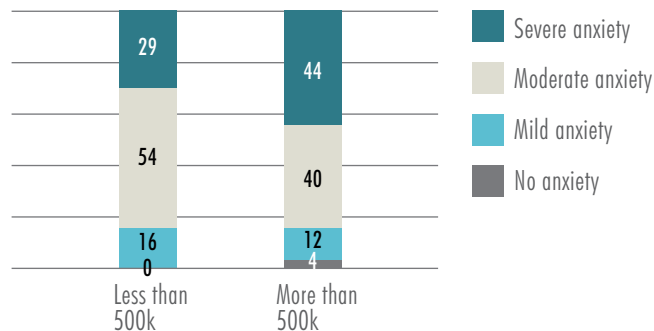
Anxiety about your organisations future by footfall/attendance



Although we might expect a positive correlation between high footfall/attendance and commercial organisations, and therefore expect those with high footfall to be more anxious about the future of their organisations, it is the other way round.

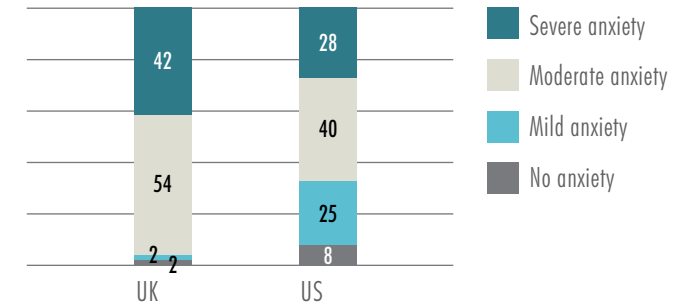
Respondents with lower footfall/attendance are experiencing higher anxiety about the future of their organisations and also about their Covid-19 resilience strategy.

Confidence in your organisation's Covid-19 resilience strategy by footfall/attendance



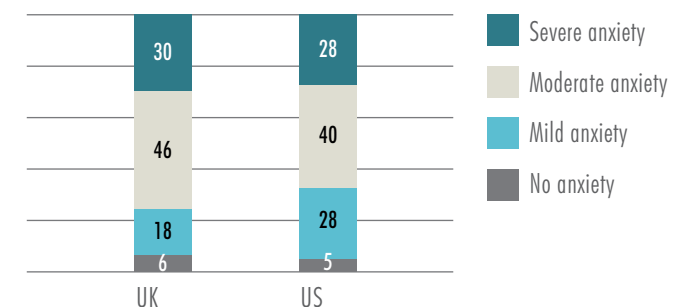
Larger footfall/attendance respondents express a much higher level of severe anxiety about their organisations Covid -19 resilience strategy than smaller.

Anxiety about the future of your sector by UK vs US



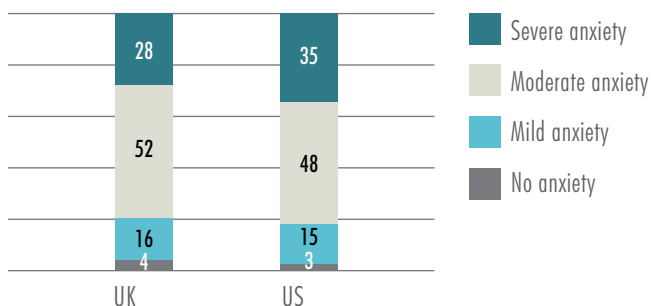
UK respondents are significantly more anxious about the future of their sector than their US counterparts. A very high 96% of UK respondents say they are feeling severe or moderate anxiety.

Anxiety about your organisation's future by UK vs US



We can see remarkably similar levels of anxiety about 'their organisation's future' between the UK and the US.

Confidence in your organisation's Covid-19 resilience strategy by UK vs US



We can see almost identical rates of severe to moderate levels of anxiety about 'your organisation's Covid -19 resilience strategy' in the UK and the US, at more than 80% in each case.

OPTIMISM

One expected corollary of high levels of anxiety will be an impact on the ratings for optimism across the sectors, however there are pockets of high optimism about the future, and we highlight differences across the attraction segments.

The survey asked about:

Optimism in the short term

- until June 2020

Optimism about medium term recovery

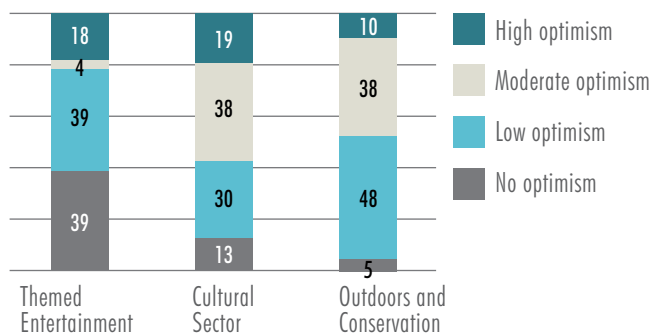
- June – December 2020

Optimism about long term recovery

- 2021

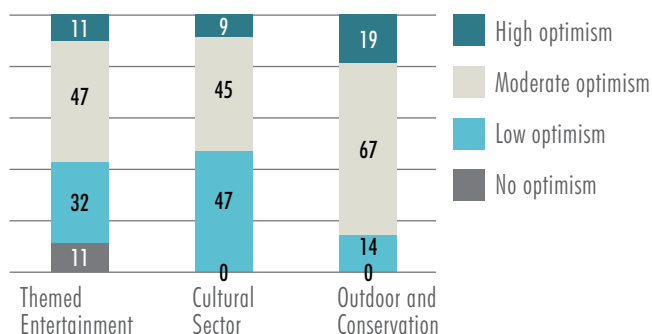
It will not be surprising that optimism is higher about the longer term than the short and medium terms.

Short term Optimism by sector (until June)



As we get closer to June and some areas of the US are just beginning to open there is still low optimism about the short term. Nearly one in five in Themed Entertainment and the Cultural sectors say they are highly optimistic.

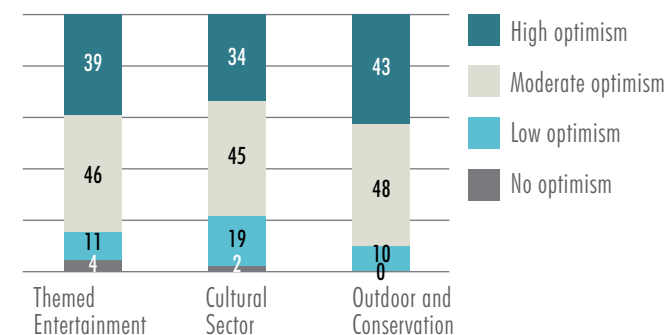
Medium term Optimism by sector (June to December)



Interestingly, the medium term future has the lowest optimism ratings in both the Themed Entertainment and Cultural Sectors. As lockdown is set to lift, the Outdoor and Conservation sectors

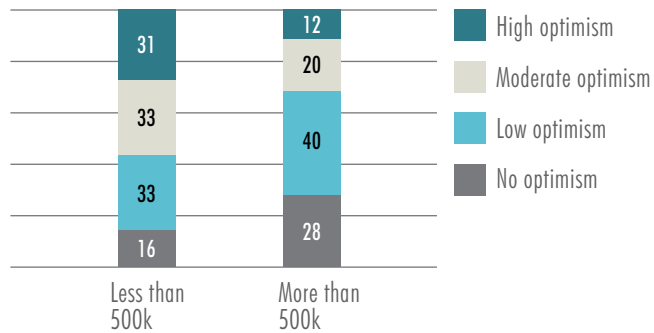
express the highest levels of optimism in the medium term – remember that those in this sector also felt that change in their sector was more likely – they did not see themselves as staying the same.

Optimism about long term recovery (2021) by sector



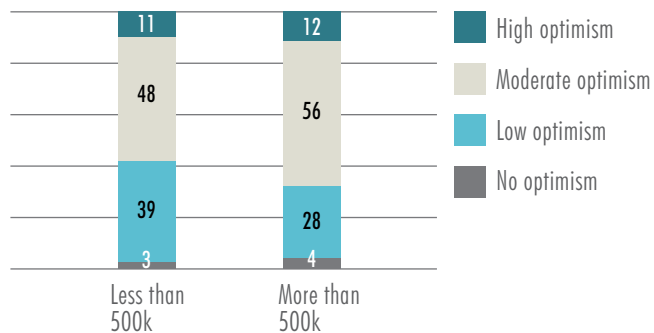
There is a similar pattern of optimism about the longer term recovery into 2021 amongst each of the sectors, though Outdoors and Conservation is more optimistic reflecting results we have seen elsewhere.

Optimism about the short term by footfall/attendance



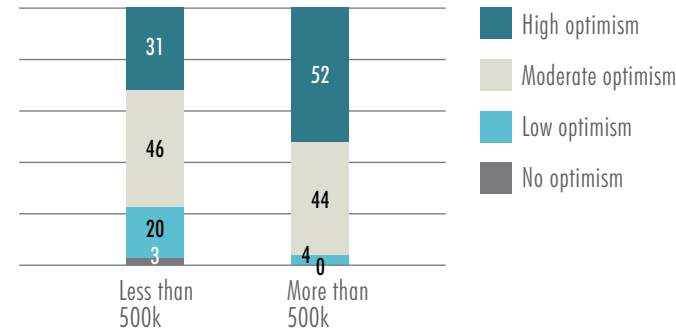
The 'more than 500k footfall/attendance' respondents expressed a lower level of short term optimism than the 'less than 500k' respondents.

Optimism about the medium term by footfall/attendance



Optimism about the June to December period peaks with moderate optimism with just over 10% feeling highly optimistic in both lower and high footfall/attendance sectors.

Optimism about the longer term by footfall/attendance

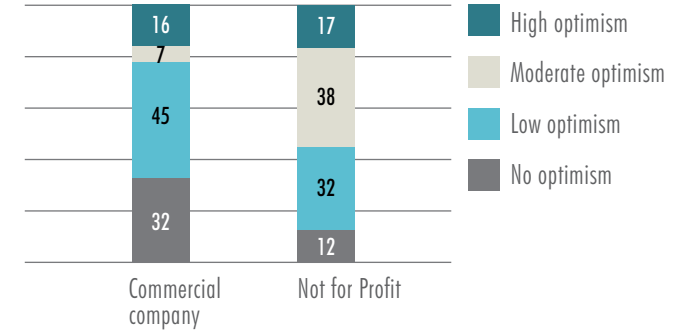


When we look at 2021 we see very high levels of optimism with 52% high optimism and 96% high to moderate optimism in the larger footfall/attendance sector. The smaller footfall/attendance sector is less optimistic but with a significant shift from low to moderate optimism from the medium term position.

Optimism by Commercial vs Not for Profit

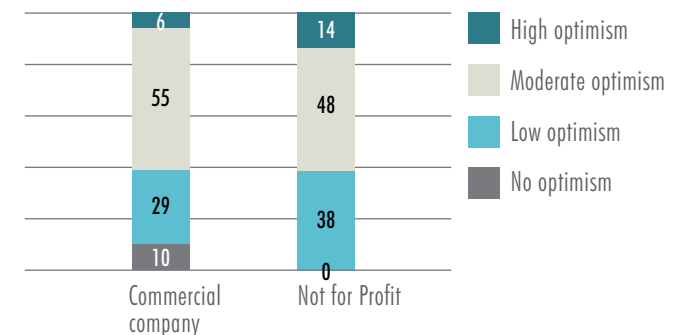
Those from the Commercial and Not for Profit sectors are more optimistic about the long-term future compared to the short and medium term. The Commercial sector shows a very low level of optimism about the medium term, but then they are more optimistic about the longer-term.

Optimistic about the short term (until June)



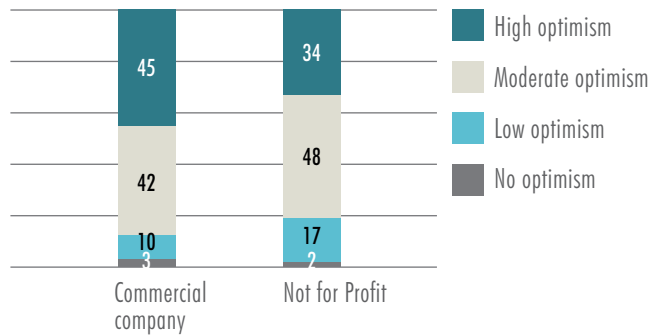
Commercial companies are significantly less optimistic about the short term than the Not for Profit sector with 77% expressing no or low optimism compared to 54%. The Not for Profit sector is 5.5 times more likely to say that they have moderate optimism.

Optimistic about medium term recovery (June to December)



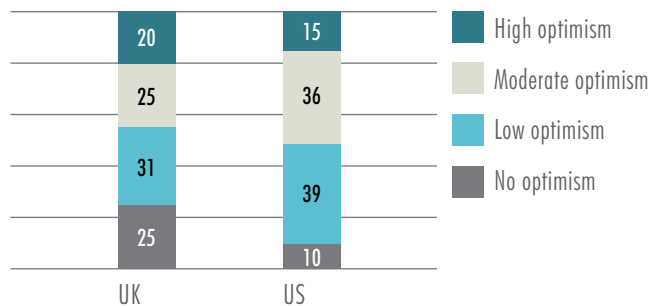
When we look at optimism about the June to December period we can see a significant increase in moderate optimism from Commercial companies and moderate optimism dominating both sectors.

Optimistic about long term recovery (2021)



Commercial companies express a higher level of high optimism about the longer term into 2021 than the Not for Profit sector though the ratings level out when we combine high and moderate optimism.

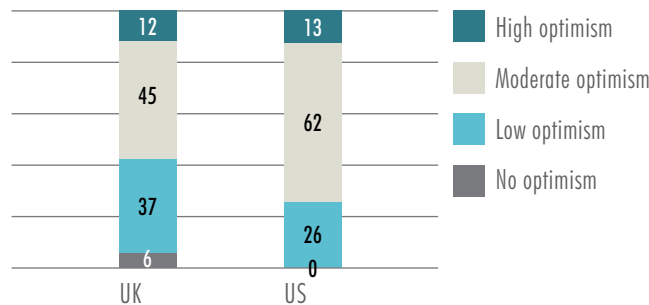
Optimistic about the short term (until June) by Geography



While there are similar levels of high optimism about the short term in the UK and the US, US respondents express a higher level of moderate optimism but also higher low optimism. The UK

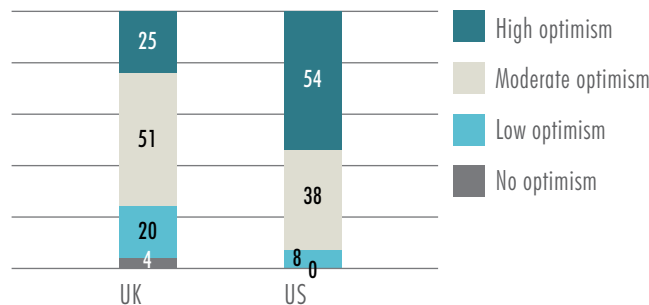
respondents are significantly more likely to have expressed no optimism about the immediate short term.

Optimistic about medium term recovery (June to December)



The US respondents express a higher level of medium term optimism than the UK but most in each country say they are mildly optimistic.

Optimistic about long term recovery (2021)



When we look at the longer term into 2021, US attractions are significantly more optimistic than those in the UK.

Supporting Industries: freelancers, consultants, and suppliers

One third of respondents to the ADV Covid-19 Mindset survey were freelancers, consultants or suppliers to the wider attractions industries. The survey results indicate that this is a vulnerable group dependent upon a thriving attractions sector and whose livelihoods have been significantly impacted by the lockdown.

Work situation

Perhaps most striking is that in the UK, 96% respondents in this category feel that their work has been impacted by the covid-19 lockdown, compared to 83% in the US.

Which of these best describes your current work situation in the current environment?

	UK%	US%
No effect on us/me at all	0	13
Some work has gone but some is still with us/me	28	39
All out/my contracts are on hold	16	17
All of our/my work has gone	12	4
Uncertain situation while clients sort themselves out	40	22

Loss of income

What proportion of your income do you expect to lose over the next three months?

	UK%	US%
Less than 20%	4	26
Between 20% to 50%	33	16
Between 50% to 80%	29	26
Between 80% and 100%	29	21
None	4	11

Only 6% working in supporting industries expect to maintain their income, with 23% expecting to lose between 80% – 100%.

The situation in the UK seems starker, with 92% of respondents expecting to lose between 20% - 100% of their income compared to 63% in the US.

Informed about Covid 19 effect on clients

Almost all working in the supporting industries in both the UK and the US feel either well informed or feel they know some of the impact of covid-19 on their clients.

In the UK 24% feel very well informed and a further 68% 'know some of it'. In the US a higher 59% feel very well informed and 41% making 100% of US respondents know some of it.

Reactions to the Covid 19 situation

The most common reactions to the Covid-19 situations comparing UK and US are:

	UK%	US%
Focusing on minimising costs	67	75
Tightening belts and waiting it out	58	65
Trying to adapt and find new types of work	58	55
Increasing self-promotion	25	55

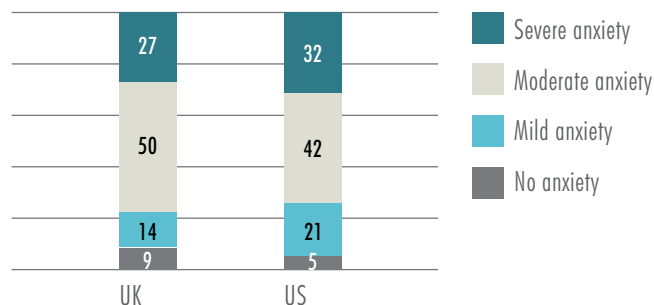
The major difference is that the focus on increasing self-promotion is more in the US mind-set than in the UK.

Anxiety

It is not surprising that overall, 28% of freelancers/suppliers feel highly anxious about their own future, with 30% feeling highly anxious about the future of their industry, and 39% feeling high anxiety about their earning capabilities.

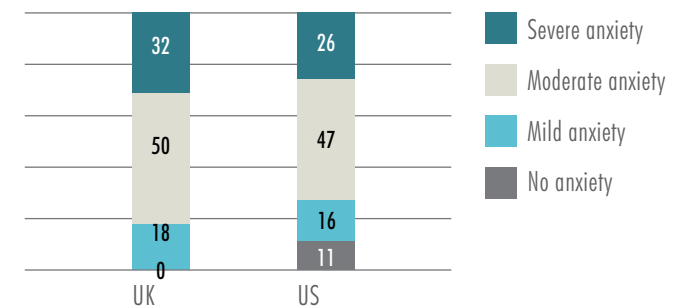
On balance there are no significant differences in anxiety levels between the UK and the US.

Anxiety about your or your organisation's future



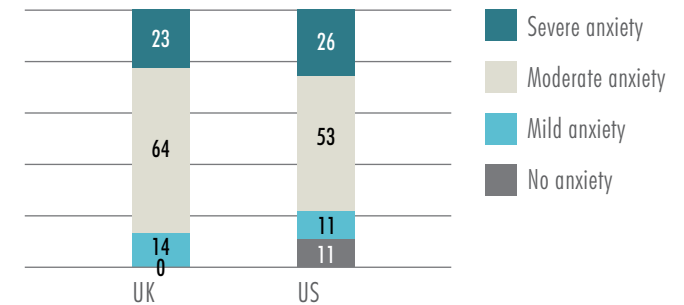
There is a high level of anxiety amongst freelancers, consultants, and suppliers in both countries with similar ratings.

Anxiety about the future of your sector



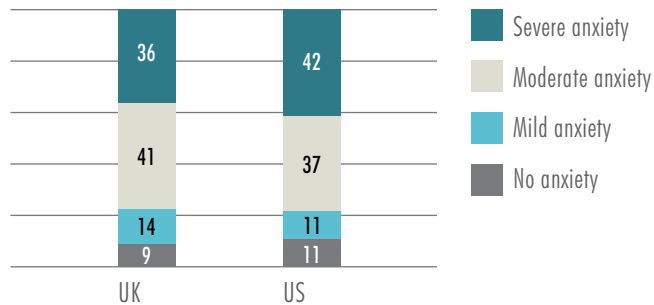
There are similarly high levels of anxiety amongst freelancers, consultants, and suppliers in both countries with similar ratings on how they view the future of their sector.

Confidence in your or your organisation's Covid-19 resilience strategy



There are similar levels of high and moderate anxiety amongst freelancers, consultants, and suppliers in both countries on how they rate anxiety in their Covid 19 resilience strategy. Close to a quarter of freelancers, consultants, and suppliers feel severe anxiety.

Anxiety about your earnings capabilities

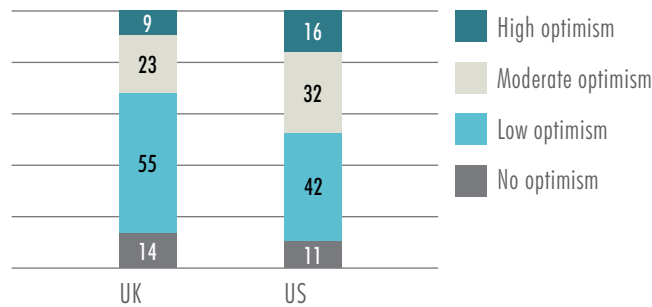


Anxiety increases in both the UK and the US in relation to earnings capabilities for freelancers, consultants, and suppliers with 36% and 42% experiencing severe anxiety respectively.

Optimism

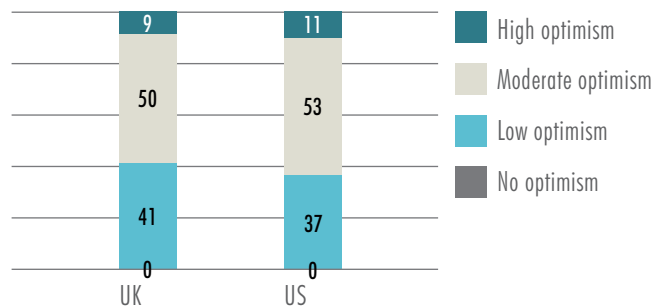
Overall optimism is quite low for both the short and medium term for freelancer/suppliers with only 11% feeling highly optimistic about the short term until June, and the medium-term recovery (June – December). A significantly higher 61% feel highly optimistic about the longer term into 2021.

Optimistic about the short term (until June)



US respondents are more optimistic than those in the UK about the short term, 16% high optimism vs 9% but this equalises for the medium term.

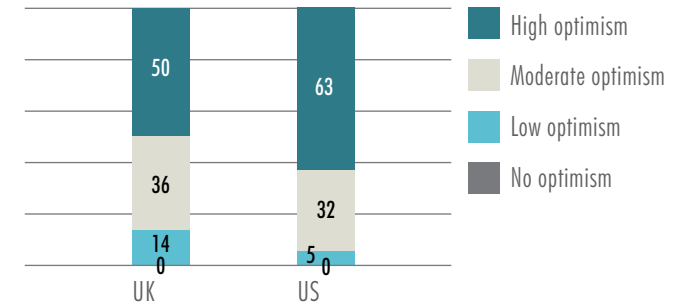
Optimistic about medium term recovery (June to December)



We can quickly see an increase in optimism and peaking around moderate optimism for the medium term to the end of the year rather than low optimism for the short term.

The US shows a higher level of optimism again when looking at the longer term with 23% high optimism in the UK vs 42% in the US.

Optimistic about long term recovery (2021)



Looking at the longer term into 2021 we can see very high levels of high optimism and especially so in the US at 63%. It may provide a warming thought that in both countries there were no respondents expressing no optimism into 2021.

Over the coming months A Different View will be releasing more research and think pieces. Please leave your contact details here http://www.adifferentviewonline.com/mindset_survey/ if you would like to receive those reports and if you would like to take part in future surveys.

Please do get in touch with us if you would like to talk more about this research:

Geoffrey Dixon
Director of Research
A Different View
+44 7775 582305
geoffrey@adifferentviewonline.com

Rosalind Johnson
UK director
A Different View
+44 1362 688109
rosalind@adifferentviewonline.com

Sylvia Matiko
USA director
A Different View
+1 615 319 4942
sylvia@adifferentviewonline.com

www.adifferentviewonline.com