

Visitor Attractions: Inc Impact of COVID-19 - UK - November 2020

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“2020 has been a very difficult year for the UK visitor attractions sector. Visitor numbers have plummeted due to lockdowns, while restrictions on domestic travel and deeply depressed levels of inbound tourism present major barriers to recovery. While social distancing measures are now core features of the visitor experience, venues must seize the opportunity to do things differently.”
– Lauren Ryan, Leisure and Travel Analyst

This report looks at the following areas:

- **The impact of COVID-19 on the visitor attractions market.**
- **Demand for visiting attractions in the next 12 months.**
- **Willingness to use digital services when interacting with attractions virtually and while attending.**
- **Opportunities for premiumisation.**

43% of adults visited a garden attraction in the 12 months to August 2020, marking the highest visitation for an attraction type in the last four years, and pushing it to the top spot for the first time. This highlights consumers’ appetite for natural, outdoor environments, which have appealed to more consumers due to indoor venues being closed or deemed less safe as a result of the pandemic.

COVID-19’s biggest legacy will be in the accelerated integration of digital services throughout the sector. The pandemic has spurred 3-4 years of technological innovation in the space of months. As a result, we have seen venues connect with potential visitors virtually, and will continue to see more sophisticated end-to-end solutions that visitors can interact with from booking to visiting and beyond.

Lower demand for domestic travel, particularly for overnight stays and significantly reduced levels of inbound tourists are the biggest threats facing visitor attractions currently. Venues must prioritise their local communities with targeted marketing efforts.

In the medium term, one of the biggest opportunities in the market lies in investing in the outdoors. By merging the indoor and outdoor visitor experience with new concepts and activities, brands can not only keep people safe amidst the viral threat but also encourage visits throughout all four seasons. Combating consumers’ seasonal behaviours will be critical to compete against other out-of-home leisure options during the warmer months, and against the comfort of home when it is cold.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Table of Contents

Overview

Key issues covered in this Report
 COVID-19: Market context
 Economic and other assumptions
 Products covered in this Report

Executive Summary

Impact of COVID-19 on visitor attractions

Figure 1: Short, medium and long-term impact of COVID-19 on visitor attractions, 23 November 2020

The market

Visitor numbers take a significant hit

Long-term picture is positive

Figure 2: Volume market forecast for UK visitor attractions, 2015-25 (prepared on 17 November 2020)

COVID-19 has impacted consumers' financial wellbeing

Lack of inbound tourism will have severe consequences for sector

Colder weather will hamper recovery

Companies and brands

Attractions go live

Virtual queues enable social distancing

Move to the great outdoors

The consumer

Demonstrating COVID-19-safe measures critical as exposure fears spike

Figure 3: Concern about risk of being exposed to COVID-19/coronavirus, February-November 2020

Three quarters of UK adults visited an attraction in the last 12 months

Figure 4: Overall attractions visited in last 12 months, September 2017, August 2018, August 2019 and 13-23 August 2020

Appetite for outdoor activities accelerates gardens to the top spot

Figure 5: Type of attractions visited, September 2017, August 2018, August 2019 and 13-23 August 2020

Gardens, historic buildings and museums to remain most popular

Figure 6: Attractions interested in visiting in next 12 months, 13-23 August 2020

Local visitors more important than ever

Day trips beat overnight stays

Figure 7: Attitudes towards virtual attraction activities, 13-23 August 2020

Venues must strike a balance between efficiency and quality

Figure 8: Digital activities interested in doing, 13-23 August 2020

Virtual queuing top premium service

Figure 9: Willingness to pay more for premium services, 13-23 August 2020

Issues and Insights

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Attractions and the 'connected trip'
From retail arms to ecommerce operations

The Market – Key Takeaways

COVID-19 hits visitor numbers, but long-term picture positive
Local visitors take priority
Cold weather will hamper recovery

Market Size and Forecast

Visitor attractions face struggles ahead
Figure 10: Short, medium and long-term impact of COVID-19 on visitor attractions, 23 November 2020

Visitor numbers take a significant hit
Figure 11: Volume market forecast for UK visitor attractions, 2015-25 (prepared on 17 November 2020)
Figure 12: Visits to UK visitor attractions, 2015-25 (prepared on 17 November 2020)

Market drivers and assumptions
Figure 13: Key drivers affecting Mintel's market forecast, 2015-25 (prepared on 17 November 2020)

Learnings from the last recession
What happened
What's different
What it means
Figure 14: Trends in visits to visitor attractions, 2007-12

Forecast methodology

Market Segmentation

England attractions enjoyed higher than typical growth in 2019
COVID-19 will boost the appeal of gardens even further
Figure 15: Attraction visiting trends in England, 2016-19

Market Drivers

COVID-19 has impacted consumers' financial wellbeing
Figure 16: Changes in financial situation, October 2019-October 2020
Lack of inbound tourism will have severe consequences for sector
VAT cuts critical to survival
Colder weather will hamper recovery
Figure 17: Quarterly participation in visiting attractions – NET any participation, May 2019-January 2020
Operators welcome government support

Companies and Brands – Key Takeaways

Attractions go live
Virtual queues enable social distancing
Move to the great outdoors

Launch Activity and Innovation

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Attractions go live

Chelsea Flower Show reaches international audiences

London Transport Museum launches virtual Hidden London series

Virtual queues enable social distancing

Paulton's Park launches virtual queuing system in partnership with Accesso

Move to the great outdoors

Archaeological Trust reveals plans for a central York outdoor attraction

Cardiff to launch Christmas at the Castle

The Consumer – Key Takeaways

Post-COVID-19: Brands should prioritise four key areas

Open spaces and outdoors

Localism

Technology balanced with quality customer service

Premiumisation

Impact of COVID-19 on Consumer Behaviour

Demonstrating COVID-19-safe measures critical as exposure fears spike

Figure 18: Concern about risk of being exposed to COVID-19/coronavirus, February-November 2020

Figure 19: Activity comfort levels, 10-19 November 2020

Attractions Visited

Three quarters of UK adults visited an attraction in the last 12 months

Figure 20: Overall attractions visited in last 12 months, September 2017, August 2018, August 2019 and 13-23 August 2020

Appetite for outdoor activities accelerates gardens to the top spot

Figure 21: Type of attractions visited, September 2017, August 2018, August 2019 and 13-23 August 2020

Future Visiting

Figure 22: Attractions interested in visiting in next 12 months, 13-23 August 2020

Attraction Destinations

'Localism' trend calls for targeted marketing

Figure 23: Attitudes towards virtual attraction activities, 13-23 August 2020

Day trips beat overnight stays

Figure 24: Attraction distinctions interested in visiting in next 12 months, by region, 13-23 August 2020

Digital Activities

Venues must strike a balance between efficiency and quality

Figure 25: Digital activities interested in doing, 13-23 August 2020

In-person tours deemed higher quality than virtual

Figure 26: Attitudes towards virtual attraction activities, 13-23 August 2020

Figure 27: Digital activities interested in doing, by age and gender, 13-23 August 2020

Premium Services

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Virtual queuing top premium service

Figure 28: Willingness to pay more for premium services, 13-23 August 2020

Exclusive experiences suited to younger Brits

Older visitors value guided expertise

Figure 29: Willingness to pay more for premium services, by age, 13-23 August 2020

COVID-19 Measures

Social distancing and sanitation most important measures

Figure 30: COVID-19 measures to prioritise, 13-23 August 2020

People are actively avoiding crowds

Figure 31: Attitudes towards virtual attraction activities, 13-23 August 2020

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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