



UK VISITOR ATTRACTIONS

Survey 2019



What UK consumers think



At Catapult PR, we've been lucky enough to work with a wide variety of UK visitor attraction – heritage railways, aquariums, farm attractions, museums, great houses and gardens and theme parks, we've done it all.

Having seen tourism attractions of all shapes, sizes and standards and handled PR for both individual attractions and cluster-groups alike, we wanted to help Britain's attractions improve their marketing, by understanding how they are perceived and appreciated (or not) and by discovering what irks their visitors.

We surveyed¹ 1000 people UK-wide, gaining extremely interesting results and regional variations. We've now used this insight as the basis of this little guide. Adding in our own marketing and PR tips, we hope it will help marketing managers of British visitor attractions, theme parks, zoos, and anything else charging entrance, to make their marketing communications more effective and their PR and marketing much more exciting. If we can help you further, please just contact **jane@catapultpr.co.uk** or call **01253 446925**.



¹The Catapult PR Visitor Attractions Survey was commissioned through Gorkana Surveys, in January 2019. It interviewed 1000 people across 12 regions of the UK. The results are licenced for the use of Catapult PR – a British PR consultancy based in Lancashire, England – alone. Any unauthorised use of the results without the express written consent of Catapult PR will be in breach of the consultancy's copyright.

I. Value, Prices & Ticketing

Cynicism Regarding Charges



29% of British consumers think UK visitor attractions lure them in with cheap tickets and then charge the earth for food, drink and extras.

Women are the harshest critics, with more than one in three (**30%**) believing this.

43% of Londoners think this. **38%** of those in the SE agree, followed by **27%** in the SW & East Anglia.

But only **6%** of NE interviewees agreed and even fewer (**5%**) in Northern Ireland.

Parents of younger children appear to be most vocal on this point.

76% of 35-44-year-olds said this.

62% of 45-54-year-olds also agreed.

TIPS

- Consider meal-deals
- Create lower-priced brochures, or offer online guides
- Create entrance + refreshment + guide packages on certain days of the week

Hug the Competition!

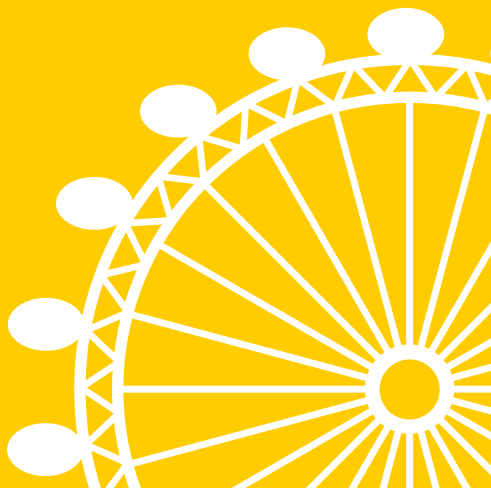
22% feel UK visitor attractions should group together, to offer joint tickets that cost less than buying single tickets for each.

A quarter of women (**25%**) and one-in-five men (**20%**) would like this.

More than one-in-three (**33%**) of interviewees in the SE would applaud this, followed by **26%** of those in East Anglia and London and nearly a quarter of those in the SW (**24%**) and NW (**23%**).

TIPS

- Talk to other local attractions to try to find ways of offering joint ticketing.
- If you are part of a cluster group, go all out to create a cross-group 'pass'.
- Make such deals the focus of dedicated PR initiatives and joint press releases.



1.2 Value, Prices & Ticketing

“More Value for Money, Please!”

26% believe UK visitor attractions do not typically offer value for money.

Women are again the most critical with **29%** of this opinion.

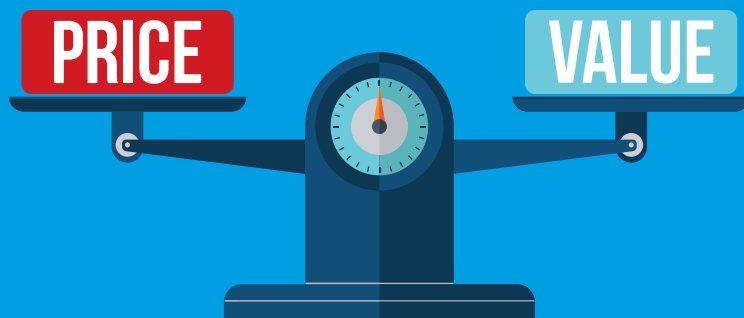
Half of 45-54-year-olds (**50%**) are keen on this, followed by **46%** of 35-44-year-olds

TIPS

- Add value through great interpretation.
- Create quizzes, games, hands-on craft activities, to keep kids entertained and increase dwell-time.
- Make staff part of your added-value by having them interact and ‘entertain’ visitors. People remember people.
- Provide free talks and Q&A sessions at regular intervals during the day.
- Weave value-for-money messaging into all PR.
- Create special activity-boosted events over key weekends/school holiday periods.
- Provide return-visit vouchers, offering reduced-price entry.
- Create local resident discounts, or special privileges.
- Try to include money-can’t-buy experiences e.g. handling or feeding a creature; touching an exhibit.
- Create a kids’ club, to offer more value after the visit, via newsletters, competitions etc.
- Include parking charges within entrance.

A whopping **42%** of those in the SE believe they do not get value for money from UK visitor attractions, followed by 29% in the SW, **27%** in East Anglia and a quarter of those in the NW (**25%**). Behind that come London (**24%**), Yorkshire & Humberside (**22%**), the West Midlands (**21%**), the East Midlands (**19%**) and Scotland (**17%**).

The happiest are visitors from Wales (**13%**), the North East (**11%**) and Northern Ireland (**7%**). The happiest are those in Northern Ireland (**7%**) and the North East (**11%**).



2. What Matters to Visitors

Toilets Need to be In Order

OUT OF ORDER

24% believe toilet facilities at UK visitor attractions are typically disappointing, being 'dirty, unpleasant or insufficient'. They also believe 'this matters'.

Women visitors feel this even more than men, with **28%** echoing this sentiment.

This is most important to 45-54-year-olds – a huge **45%**. The 35-44-year-olds are close on their heels with **42%**.

The condition of toilets is even more important to those in the SE (**37%**), London (one-in-three: **30%**), and visitors in the NW region (**29%**).

TIPS

- Hold toilets in the same regard as any other 'exhibit'.
- Why not challenge yourself to be better and compete in the Loo of the Year awards (www.loo.co.uk)?
- Involve visitors in reporting any loo defects.



Tearooms Are a Huge Asset

32% say: "there's nothing like a good tearoom to round off a visitor attraction experience."

This is definitely the way to tick the box of female visitors, with **41%** agreeing with this sentiment.



45-54-year-olds cannot get enough of a good tearoom, with more than three-quarters showing tearoom love.

Those in the SE (**47%**), NW (**43%**), SW (**39%**) are above average when it comes to loving a good tearoom. Those way below average are in Wales (**10%**) and Northern Ireland (**6%**).

TIPS

- If you're in a region in which tearooms aren't appreciated, this is a big opportunity, as you may be the trailblazer for tearooms. Source local produce, tell the story of the local area through your menus, displays and food, and appeal to local pride. Keep things local, but affordable, and put a lot of PR behind your tearoom.
- Keep your tearoom top-of-mind by giving it its own PR support. Create a calendar of opportunities comprising key dates around which you can promote your tearoom. Use these as the focus of press releases, festive stories, online content (blogs and useful tips on how to create similar cakes/treats etc.) and also social media posts.

3. The Age Gap

9% feel UK visitor attractions hold no attraction for adults without kids.

7% haven't been to a UK visitor attraction since they were a child (**6%** of men; **9%** of women).

15% of people in London feel there is nothing to attract an adult to a UK visitor attraction. **14%** of those in the NW also feel this, whilst this feeling drops to just **3%** of those in the East Midlands.

Only 1% of those in the East Midlands and in the North East haven't visited an attraction since they were a child.

In London, that's **13%** and in the SW it's **9%**.

At least **one-in-ten** adults feel attractions are only for those with kids. This rises to one-in-five 45-54-year-olds. **16%** of that age group also haven't visited an attraction since they were a child. This falls in older age groups – perhaps because they become grandparent visitors.

TIPS

- Work with a creative PR company to devise aspects of appeal to adults of all ages.
- Be pro-active with your PR when it comes to promoting parts of your experience that could bring adult visitors through the door.
- Involve adults in childlike things more. Appeal to the 'inner child' and encourage them to share their experiences with their age-group peers on social media.



4. Garden Attractions

Garden attractions need to do more to bring the plants, trees and flowers to life, for the visitor who's not that well up on their gardening (**16%**).

Only East Anglia, Scotland and Northern Ireland seem to feel this less important, but even there, more than one-in-twenty feel more interpretation is required in garden attractions.

Garden attractions should note that a huge **39%** of those aged 35-44 and **41%** of those aged 45-54 feel this important.

A huge **27%** of those interviewed in the SE said this added interpretation is needed. The other high percentages were London (**21%**), NW (**19%**), SW (**18%**) and Yorkshire & Humberside (**16%**). Nearly one-in-ten in the NE (**9%**) agreed, as did **14%** in Wales, **13%** in the West Midlands and **11%** in the East Midlands.

TIPS

- Concentrate on your content, both inside the attraction and online.
- Don't preach about your plants and flowers, but engage in storytelling, explaining what's really interesting about them. Find that something that someone who's a real gardening novice could find worth remembering.
- Make sure your PR also focuses on bringing the flora to life and that ideas are built around what's interesting. Product development based around this could then bring more visitors in.



5. How Groups Can ‘Ruin’ the Experience

It ruins the experience for **13%** of visitors if a group of school children arrive during their visit.

It ruins the experience for **12%** when a coach party arrives.

Nearly one in five in all age groups bar 65-and-over find a visitor attraction experience ruined if it coincides with a school trip.

But one in ten of that age group – still lower than all others – find the experience ruined if a coach party arrives.

In London, a quarter of people surveyed say that a group of schoolchildren arriving during their visit can ruin the experience.

It's **16%** in the East Midlands, **12%** in the NW, **11%** in Yorkshire & Humberside and the SE, one in ten (**10%**) in East Anglia, the SV and the West Midlands and **9%** in Scotland. The least perturbed are the NE and Northern Ireland (**4%**) and Wales (**5%**).

17% of NW consumers find a visitor attraction experience ruined when a coach party descends. It's **16%** in London, **14%** in the SE, **12%** in the SW and **11%** in the West Midlands.

TIPS

- Seriously consider the impact of a group on other visitors, especially if the group takes preference in any way (e.g boarding a boat first or being taken to the front of a queue).
- Try to keep groups separate from other visitors, so that independent visitors are not held up, left unable to see exhibits, forced to listen to a teacher's narrative, or upset by the group's behaviour.
- Try to ensure a member of staff is there to ease the 'pain', by offering extra attention to those not in the group, to avoid them feeling like second-class citizens.



6. Misconceptions About UK Visitor Attractions

11% feel UK visitor attractions are not as exciting as attractions abroad.

6% feel the only good UK visitor attractions are in London.

More men than women feel overseas attractions are better (8% v 5%).

One-in-five people in London (**20%**) feel attractions overseas are more exciting than those in the UK. It's a around one-in-ten in East Anglia and the East Midlands, and slightly higher in Northern Ireland (**11%**) and the South East (**12%**). That belief is lowest in the SW and Wales (**5%**).

Other than in London, where it is **18%**, fewer than **8%** of people in other regions believe London is home to the only good visitor attractions. Interestingly, however, **6%** of Scots feel that.



The feeling that the only good visitor attractions are in London increases from **14%** (age 18-24), to **15%** (age 25-34) and to **19%** (age 35-44). It then tails down to **3%** (age 55-64) and **5%** (over 65s).

Over a quarter of 35-44-year-olds think UK attractions are not as exciting as attractions abroad. **26%** of 18-24-year-olds feel this too, as do **20%** of 45-54-year-olds.

TIPS

- If you promote your attraction in a dull way, the perception will be that it is dull. Liven up your PR and online content.
- Engage in product development, keeping your annual events programme vibrant. A good PR company should help with this and come up with ideas for you, so you can change things up regularly.
- Start storytelling, rather than just reporting what you have in your attraction. People will then be better engaged.

7. Heritage Seen as ‘Dusty and Dull’

7% of those surveyed on behalf of Catapult PR felt heritage attractions to be too dusty and dull, meaning **93%** do not – a huge boost for heritage.

More men (**8%**) than women (**5%**) feel heritage is dull.

Despite the overall positivity, nearly one-in-five of 35-44-year-olds believe heritage attractions to be dull – this perhaps comprising the main ‘parents’ group. **14%** of 55-64-year-olds also feel this.

The region most in need of being converted to the vibrant heritage attraction offering is the NW, where one-in-ten find it unappealing. In the West Midlands, this is only **2%**, with other fans being the East Midlands (**3%**), Wales (**3%**) and Northern Ireland (**3%**).

TIPS

- Heritage attractions have great opportunities for storytelling. Don't forget to bring the past to life in your PR, communications and content marketing.
- Make sure your interpretation is as lively as it can be, to prevent instant judgements and immediate, “I'm bored” comments.
- Find ways to keep dads and lads occupied, if mums and lasses want to tour your heritage attraction. All can end their trip in the tearoom!
- Inject as much hands-on technology (Apps, touchscreens, interpretation) into the heritage offering as you can – but make sure it's always in working order!
- Search for the heroes in your heritage story and build PR and content around them. Your visitors will identify with these characters.



8. Technology and Visitor Attractions

14% believe video and phone games have killed the appeal of UK visitor attractions for kids.

23% say UK visitor attractions need to up their game in the fast-moving 21st century world.

29% of those in the South East – almost a third – feel the interest that kids once had in visitor attractions has been killed by video and phone games. The same is true of **19%** in London, **16%** in the NW & **13%** in Yorkshire & Humberside.

35% of people in the SE, **27%** of those in the NW and **26%** of those in the East Midlands and the SW believe UK visitor attractions need to up their game. Only one-in-twenty (**5%**) of North-Easterners feel the same.

37% of 35-44-year-olds feel video and phone games have won the attention of kids, at the expense of visitor attractions. **30%** of 55-64-year-olds feel the same, as do **25%** of 45-54-year-olds.

More than half of 35-44-year-olds say UK attractions need to up their game. **43%** of 45-54s feel the same, as do **39%** of 55-64s.

TIPS

- Visitor attractions need to promote their appeal to youngsters - but also their parents - more effectively, demonstrating that what they offer can be just as much fun, and often more beneficial, than a video or phone game.
- Attractions should build on the educational benefits of what they offer, contrasting this with many computer and phone games that have no educational benefit.
- Getting feedback from the computer-game generation – endorsement from youngsters, for youngsters – is key.
- Using the language kids are used to, will make things more relevant to them – particularly on social media. Get down with the kids, if you want to attract those kids.



9. The Forgotten Kids

Nearly one-in-ten (**9%**), believe UK visitor attractions only put things on for younger children and don't care about the over-10s.

11% of women believe older children are forgotten.

Whilst typically very positive about UK visitor attractions, one-in-8 (**12%**) of North-Easterners feel the over-10s are side-lined, as do **12%** of Londoners. The region believing this most, however, is the SE (**13%**).

26% of 35-44-year-olds – a key target audience for visitor attractions – feel not enough is done to cater for over-10s. Interestingly, **24%** of 18-24-year-olds also think this.

TIPS

- Try to create a range of activity to engage older brothers and sisters, who might otherwise become bored whilst younger siblings enjoy your attraction's features. These older children could become Young Reporters, photographers or social media commentators perhaps, provided with hashtags to use whilst posting and perhaps rewarded with spot prizes (prize per week for the best).
- Grade your content by school year, to help you focus on what's useful content for older children in the family.



10. Petrol and Perceptions

17% of those surveyed say the price of petrol would put them off driving more than 40 miles to visit a UK visitor attraction.

6% have taken one look at the outside of a UK visitor attraction and been so put-off that they didn't go in.

Both of these factors deter more women than men, 18% saying the price of petrol would affect a decision to visit and 7% being swayed by first impressions.

41% of 35-44-year-olds, 33% of 55-64s and 31% of the 45-54 age group are petrol-price sensitive when it comes to visiting attractions. More than one-in-five 25-34s (23%) and over-65s (21%) feel the same way.



Those in the SE (36%) are the most likely to not visit an attraction if it entails a 40+ mile drive, due to petrol prices. 18% of those in the NW and 17% of Londoners would also be deterred. Least petrol-price sensitive are the Welsh (8%).

South Easterners are also most likely to judge attractions on external appearances (16%).

The most likely age group to judge an attraction on external appearances are the 25-34s (19%). They are followed by the 35-44s (15%).

TIPS

- Place extra emphasis on added-value, as petrol prices continue to worry consumers.
- Recognise the value of local residents and advocates at this time, creating special events/offers for local families and adults.
- Put together great content for local schools – in education packs, in downloadable online content that will bring traffic into your website, and in website copy.
- Work with local hospitality providers, organising fam-trips so they can become your ambassadors.
- Consider out-reach activities with local community groups and schools.
- Make your PR and editorials in local and regional drive-time media compelling enough to overcome petrol cost worries.
- Ensure your external servicescape (car park, windows, state of repair of the building, leaflets, gardens, reception area, playground, external café or other facilities), are clean, attractive, up-to-date, professional, smart and on-message. Visitors will pick up on the signals and messages that any dirtiness, shabbiness, or other negative imagery emit.

II. Clearer Vision

More than a quarter of people surveyed said it would be brilliant to see visitor attractions incorporating new audio features that could help the blind and visually impaired hear about exhibits and features.

This actually matters to **30%** of women.

This ticks the box of **37%** of Londoners, **33%** of those in the SE, **30%** of South Westerners, **29%** of those in the NVW, **22%** of people in the East Midlands, and **21%** of those in Yorkshire and Humberside and in Scotland. However, there is a big regional difference here. It matters to only **6%** of people in the North East and to **8%** in Northern Ireland. In the West Midlands, **17%** would like to see this facility.

This is most important to the 25-34s (53%) and 35-44s (51%)

TIPS

- If you wish to give your blind visitors, and those with impaired vision, an experience that will enable them to have even more enjoyment from visiting your attraction, check out what **<https://tac-grid.uk>** can do with solutions such as its Smart Cane technology. Your visitors will be wowed and it is not expensive, or messy to install. You never know, it could also help you with an entry for an 'access-for-all' tourism award.





Summary

Tourism attractions face some challenges when it comes to the perceptions that visitors have of them and there are some obstacles to overcome, such as the price of petrol and the appeal of computer and video games for children who would have traditionally visited attractions for their entertainment in school holidays and at weekends.

In general, visitors want more for their money and that is likely to increase as the economy becomes tougher and budgets are squeezed. UK visitor attractions have to deliver better value-for-money experiences and be careful about how they charge their visitors. Areas where prices might be lower, do not feel this as much as others, but that's not to say that they might, if incomes come under pressure

British visitor attractions need to communicate their features in a higher impact way and pay careful regard to areas such as their toilets and their external servicescape. Better interpretation is key to the visit enrichment process, whether indoor or outdoor. We also gained a sense that the 21st century visitor wants to see better facilities for disabled visitors, regardless of whether or not this directly benefits them. The age of the 'concerned' visitor is upon us.

Tearooms are a huge asset for any attraction and attempts to create one, or a good one, would stand many attractions in good stead. However, attractions should beware the temptation to mix group visitors with independent-paying guests, in the tearoom or elsewhere in the attraction. Making sure older children also have something to do, whilst their siblings are entertained, is also a way to potentially boost entrance.



If you need help with the PR and content marketing of your attraction, please get in touch with Jane Hunt on **jane@catapultpr.co.uk** or ring **01253 446925** for a no-obligation chat and initial meeting. Support from a team with qualifications including a specialist CIM Tourism Diploma, not to mention prestigious awards won for campaigns conducted for tourism businesses, does not cost the earth and could make a huge difference to your visitor numbers and product development.

Please visit **www.catapultpr.co.uk** for more information.



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