



Challenges and opportunities in the cost-of-living crisis

 14/11/2023



Today's Presentation



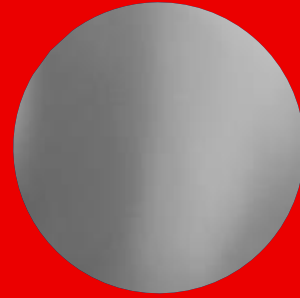
01 Current attitudes to the cost-of-living crisis



02 Opportunities learned from our Mystery Visits programme

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Implications of the cost-of-living crisis

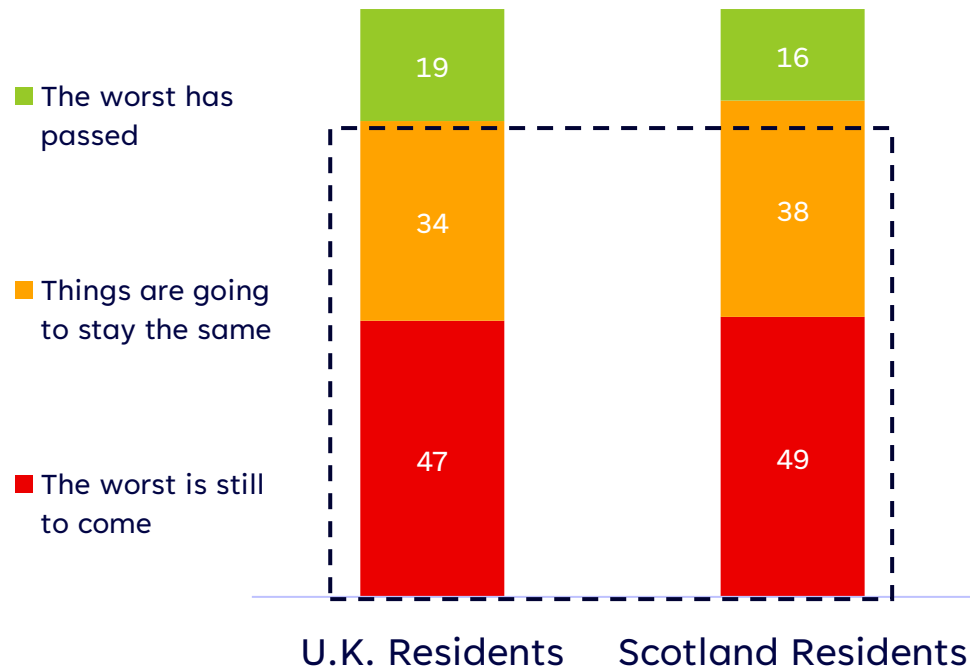


The public remain pessimistic and
are cutting back on leisure
spending as a result 🌀

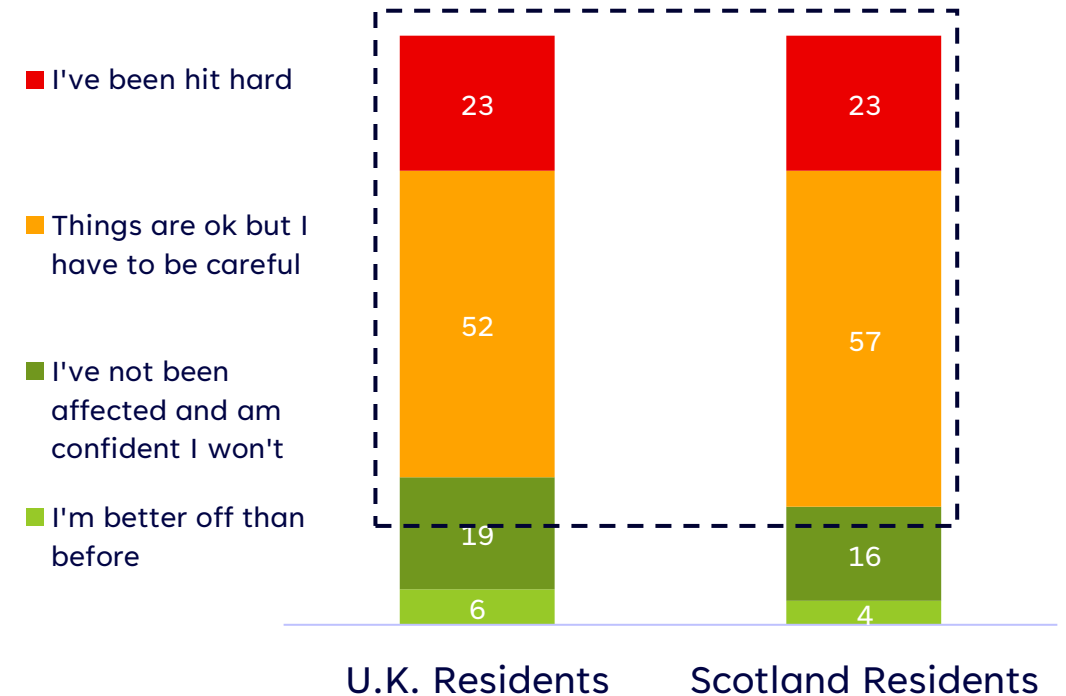
The UK and Scottish public remain broadly pessimistic in relation to the cost-of-living crisis, and it is clearly impacting their leisure behaviour



Perceptions of the cost of living crisis (%)



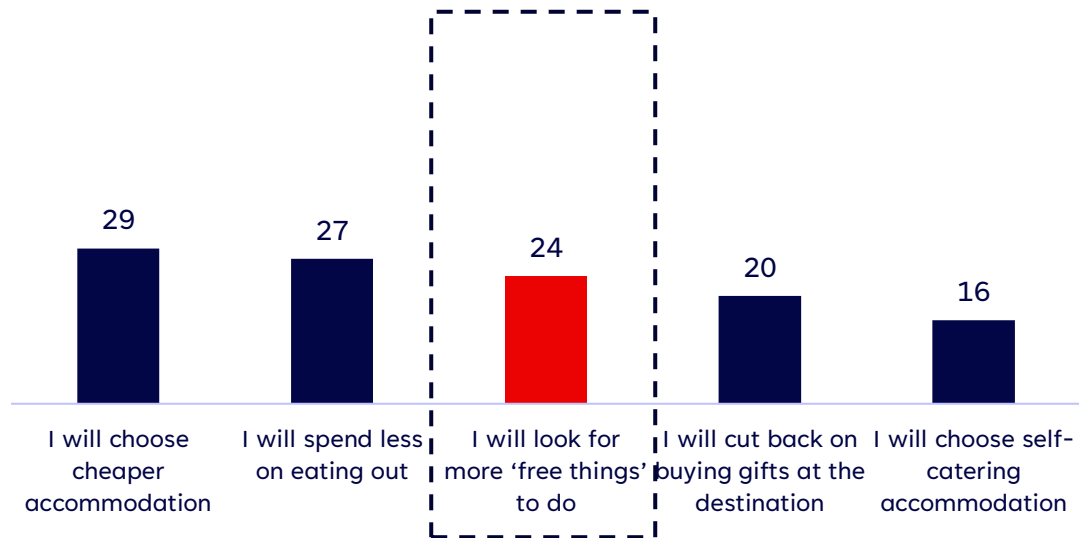
Impact of the cost of living crisis (%)



Q7b: And now regarding the 'cost-of-living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.268

There is a strong intention to look for more ‘free things to do’ on holidays and days out – good news for free attractions but a challenge for those that charge

‘Cost-of-living’ impact on UK holidays Top 5 (%)



‘Cost-of-living’ impact on day trips Top 5 (%)



VB7iii. How, if at all, would you say the ‘cost-of-living crisis’ is likely to influence your UK short breaks or holidays in the next six months?
 Base: All UK respondents. n=1,756; All Scotland respondents n=268.

Free cultural venues are the only attractions the public are likely to do more of – attractions with a high price tag likely to generate fewer new visits

Places people will visit more or less of in the next six months (%)



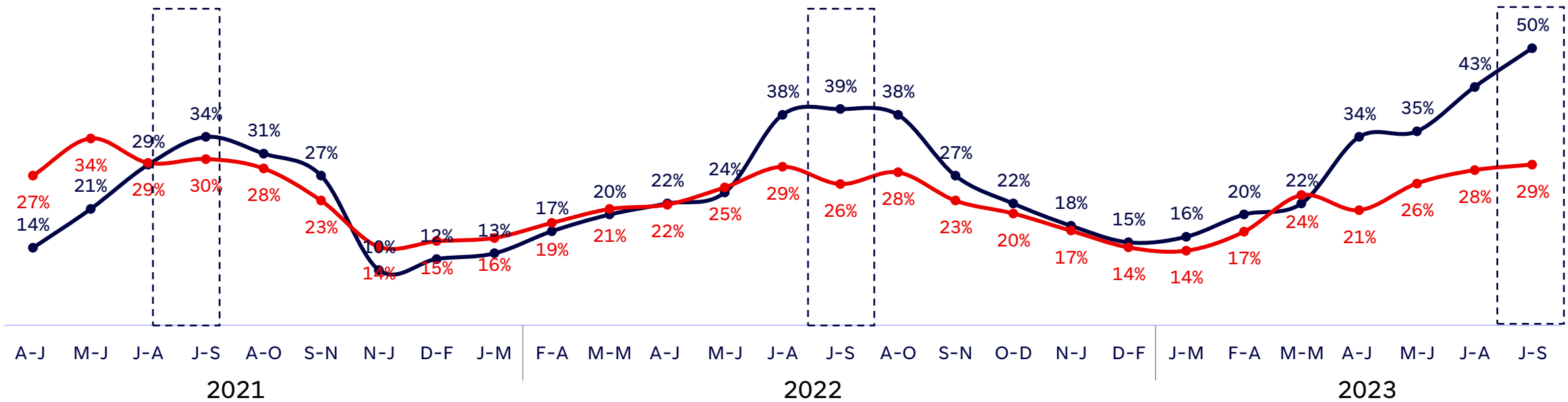
VB7iii. How, if at all, would you say the 'cost-of-living crisis' is likely to influence your UK short breaks or holidays in the next six months?
 Base: All UK respondents. n=1,756; All Scotland respondents n=268.

Concerns around finances lead to
last-minute leisure decisions 

People are not following through with the trips they have planned – this summer, 40% of those that planned a domestic holiday didn't end up taking it..

UK trips planned/taken in 3 month periods (%)

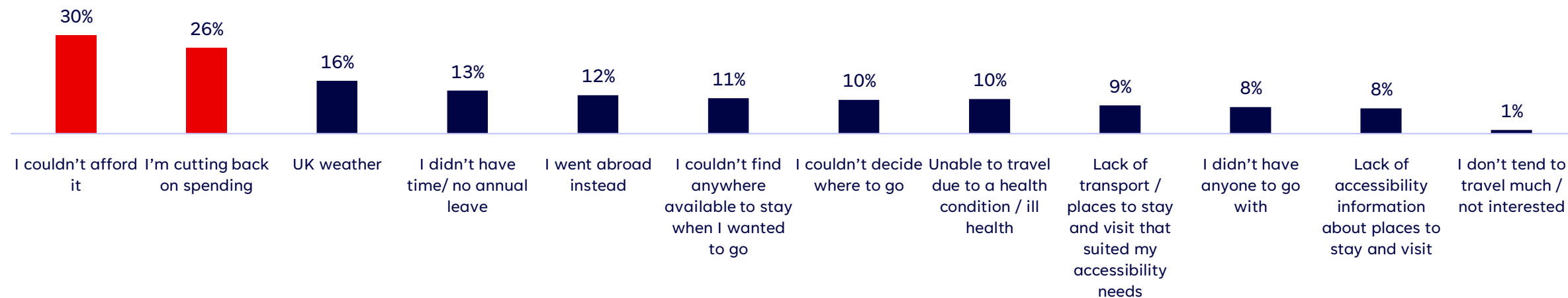
● UK Trips Intended ● UK Trips Taken



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
 Base: All UK respondents. n=1750 each wave *Actual trips taken is only available from April 2021 up to December 2022. Please note questionnaire was updated in April 2023 so there may be some artificial uplift

The decision not to take a planned UK holiday was driven by a range of reasons, each of which become more salient when leisure is booked last minute

Reasons for not taking a UK overnight trip despite originally intending to (%)



Source: VisitEngland Domestic Sentiment Tracker

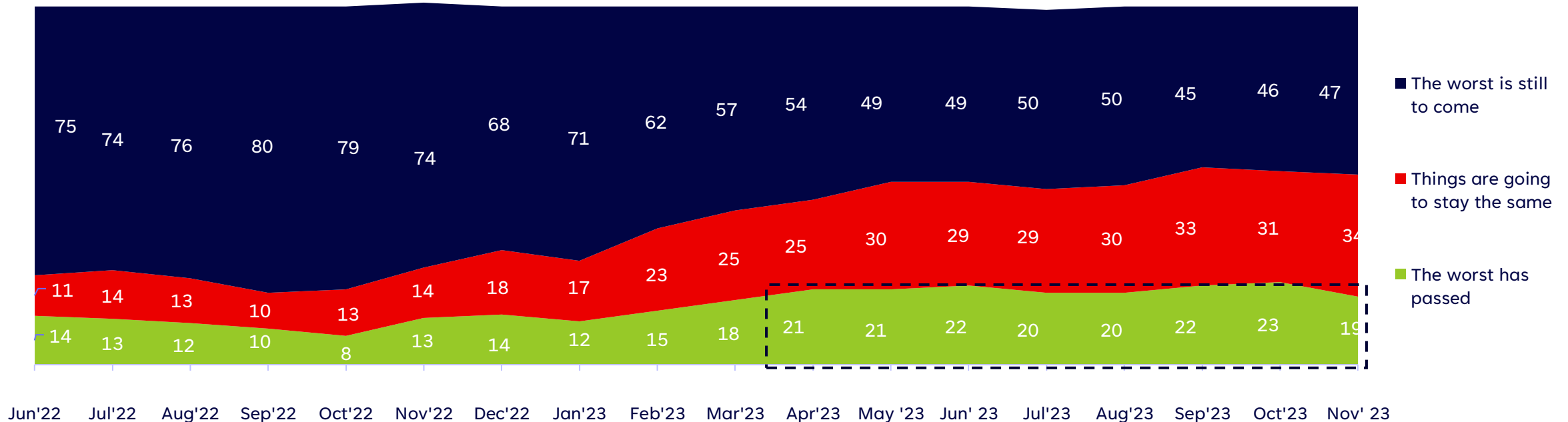
Question: VB13hW53: VB13h2W53. Why did you not take an overnight short break or holiday in the UK during the summer months (June-September) this year?

Base: All non-summer trip takers considering taking a summer trip n=488

It's not as bad as last year and for some audiences it's not that bad at all!

Despite the public still being concerned, there are signs of increased optimism – although the over-riding sense is of ‘stasis’, ‘the worst has passed’ barely moving since April 2023

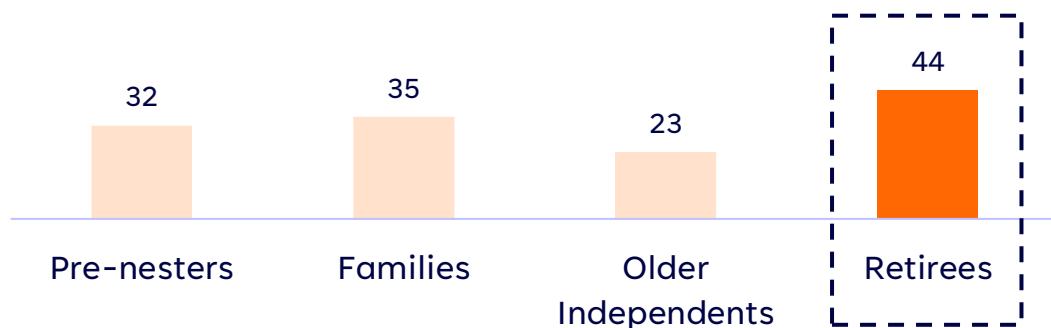
Perceptions of the cost-of-living crisis over time (%)



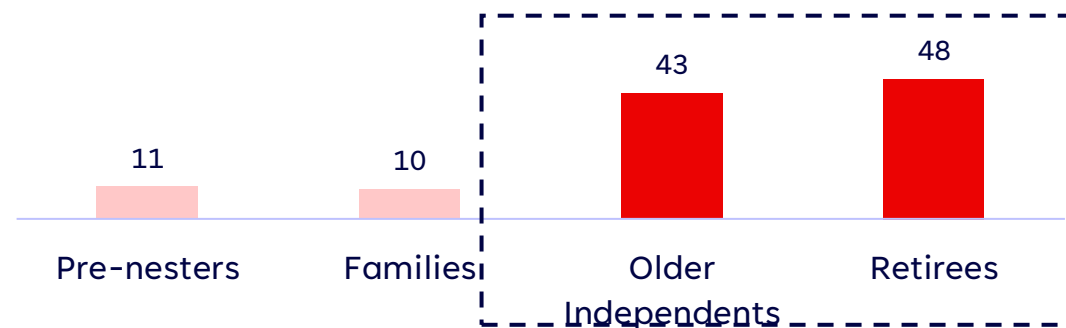
Q7b: And now regarding the ‘cost-of-living crisis’ in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion?
 Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.268

The picture is not uniform across life stage though – retirees less likely to be impacted by cost-of-living, to claim no barriers to a trip and to have booked a trip

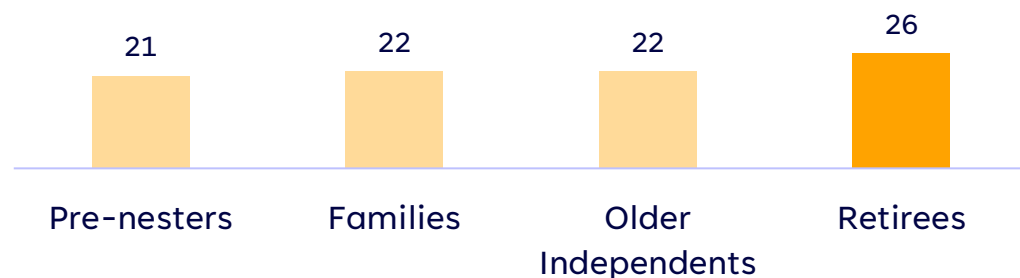
Not impacted by cost-of-living crisis (%)



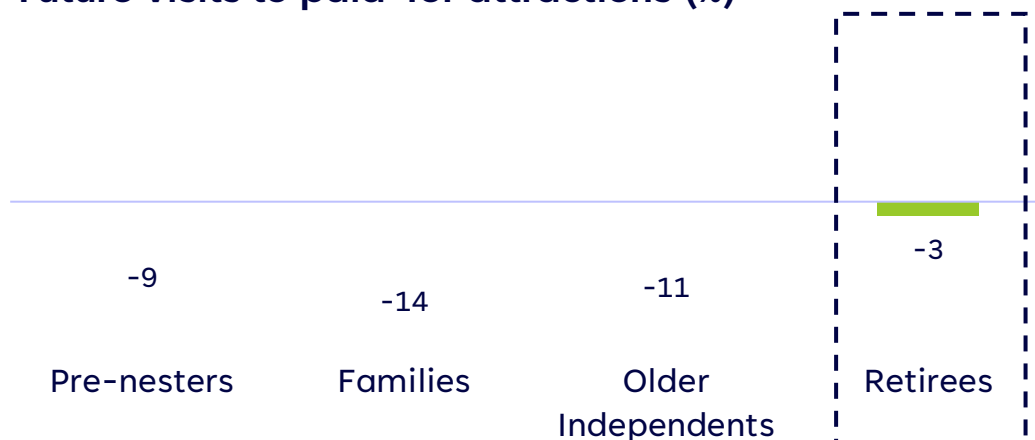
No barriers to domestic holidays (%)



Future visits to free attractions (%)



Future visits to paid-for attractions (%)



Trends in UK holiday-taking strongly emphasise the opportunity to engage with retirees

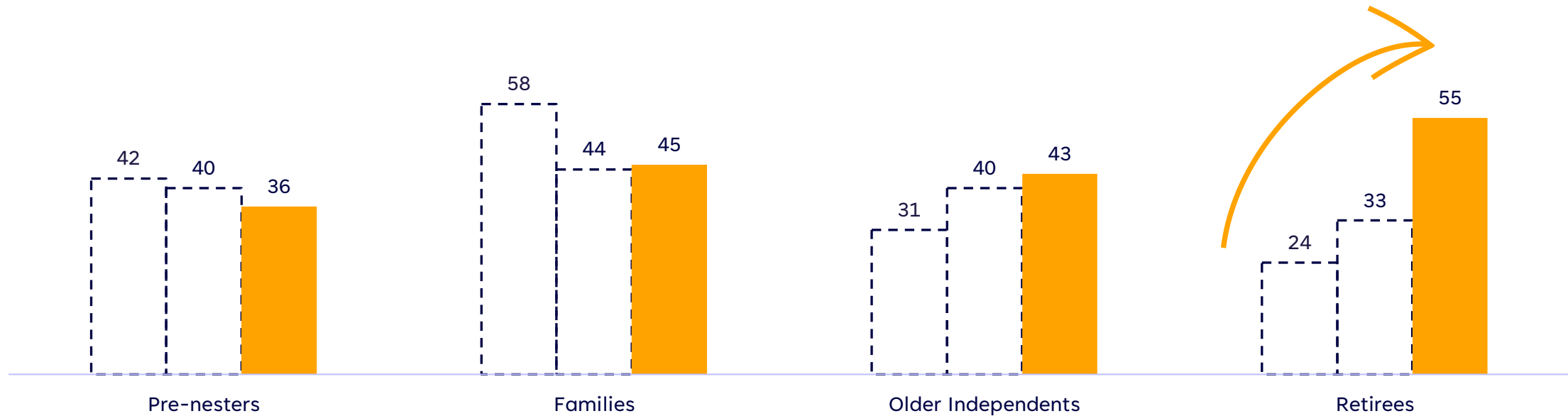


UK holidays taken between April and September by life stage (%)

2021

2022

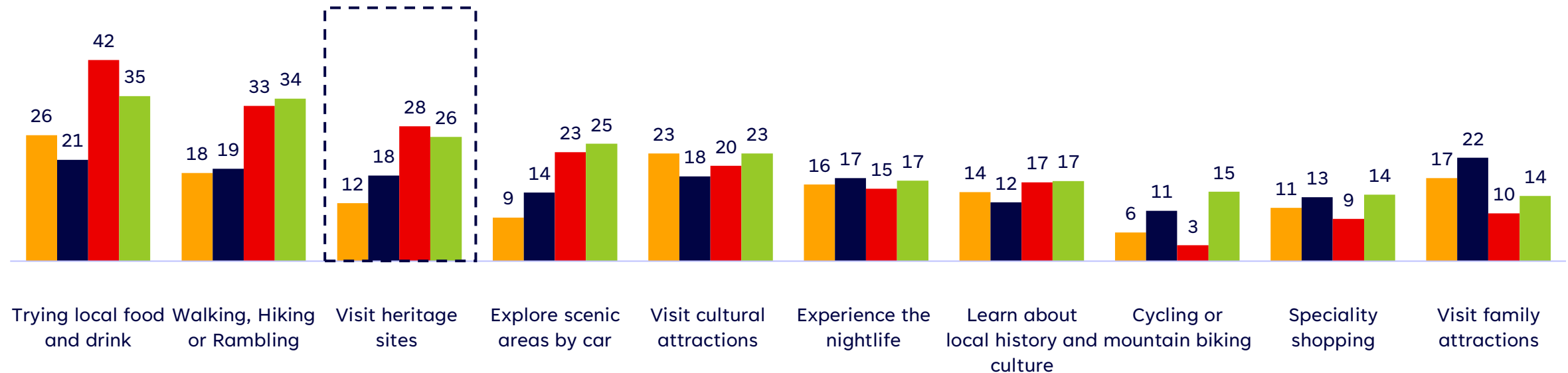
2023



There are strong implications of a domestic trip-taker with an ‘older skew’ – local food and drink, walking, heritage and exploring scenic areas all more important

Motivations for domestic autumn/winter breaks (%)

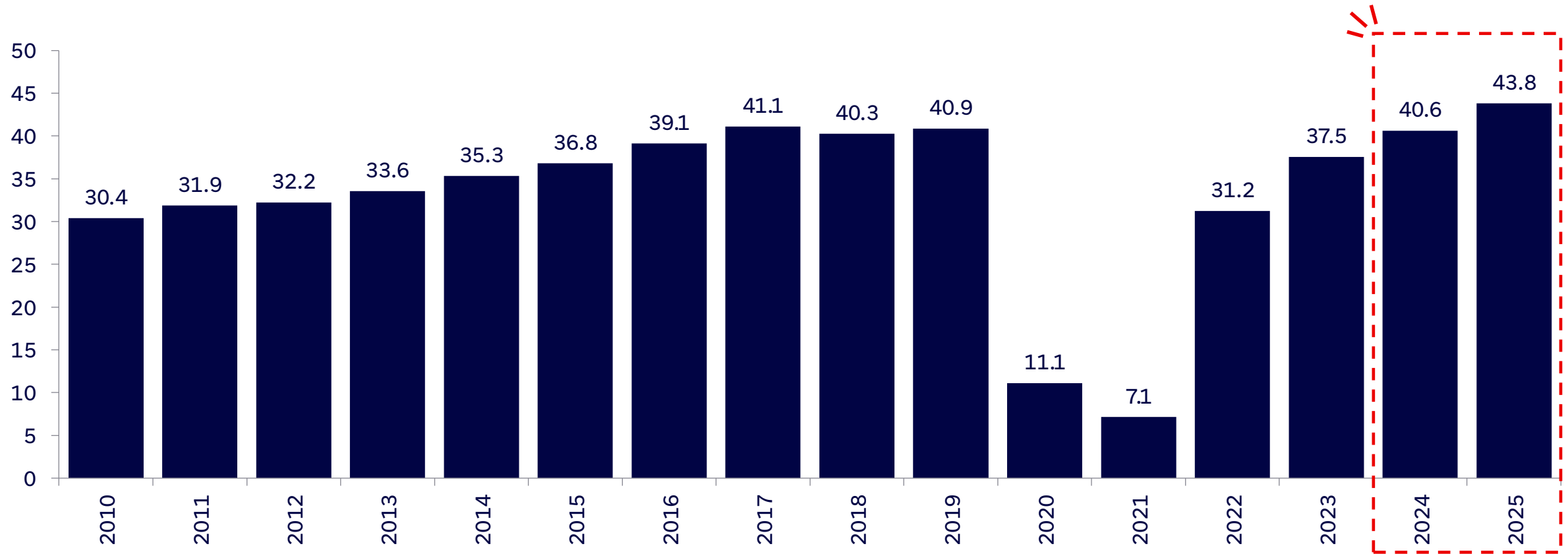
■ Pre-nesters
 ■ Families
 ■ Older Independents
 ■ Retirees



VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Scotland.

Inbound tourism is also set to continue to increase...

Inbound tourism to the UK – visits (millions), trend and forecast. July forecast.



Source: International Passenger Survey to 2020 and for 2022; VisitBritain model and forecast for 2021 and 2023; Oxford Economics forecast from 2024

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Lessons from the Mystery Visits Benchmarking Programme



A summary of the Mystery Visits Benchmarking Programme



450 x Mystery Visits amongst UK attractions (in 2023)

361

assessed in this presentation



Between March and December this year

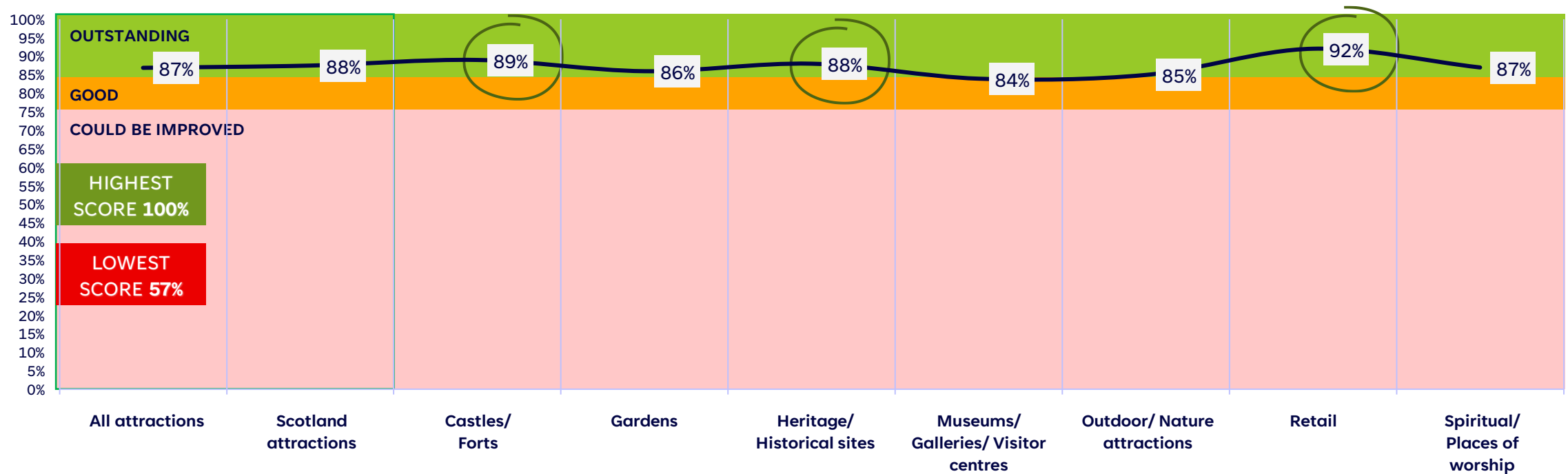


Measuring the whole visitor attraction experience

The 'All attractions' average remains in the 'outstanding bracket' at 87%, only slightly lower than in 2022 (89%)

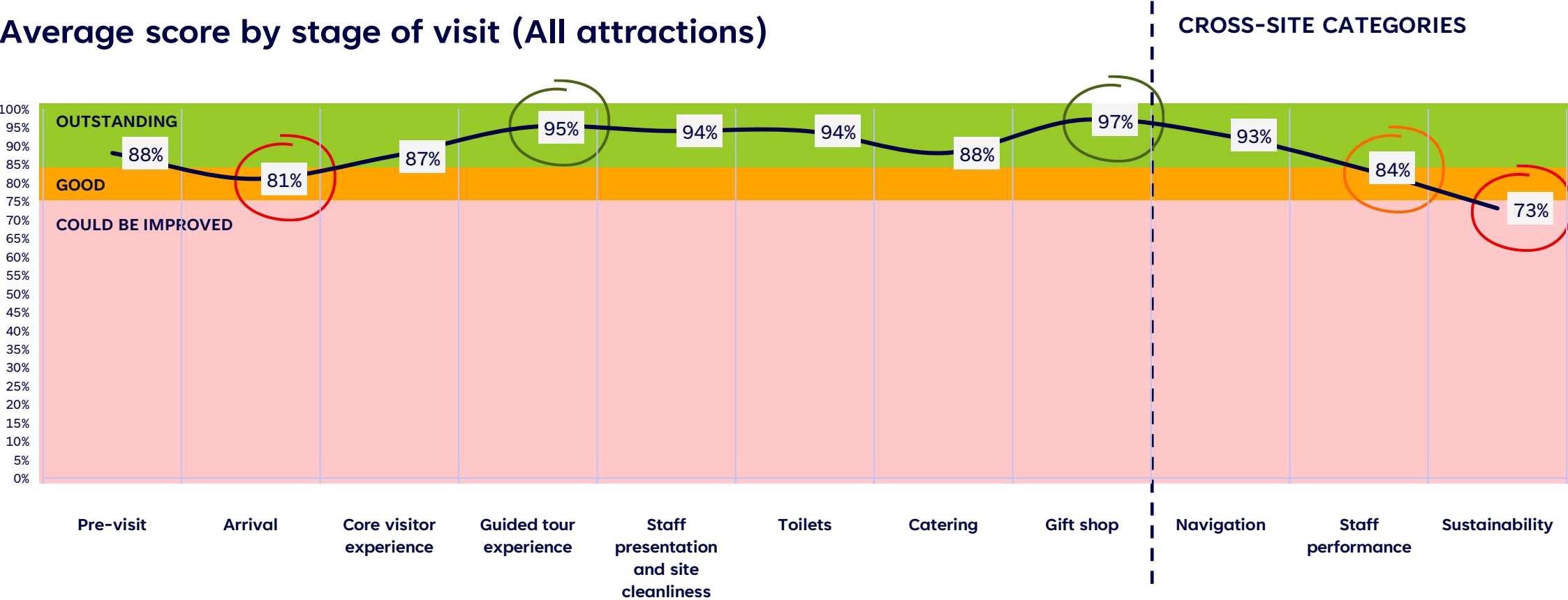


All attractions and sector average scores



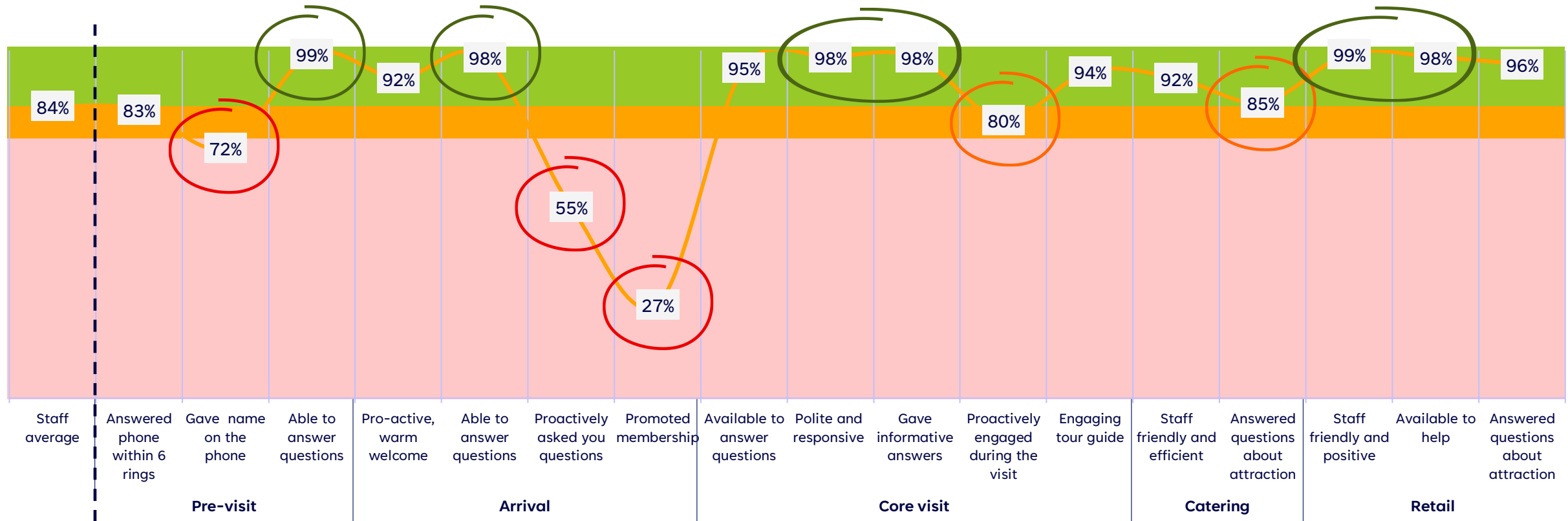
Most parts of the visit excel but three areas score below outstanding

Average score by stage of visit (All attractions)



Staff scored outstanding in 'responsive areas' but low in 'proactive areas'

Staff ratings



Staff interactions on arrival can set the tone for the whole visit, but nearly half of venues do not do this. Is this an easy win?

55% asked questions pro-actively on arrival



Why ask questions on arrival?

- Make experiences more personalised and relevant (helps staff tailor communications)
- Make visitors feel valued and welcome (better connection with staff)
- Set a positive tone for the visit
- Provides 'permission' to ask staff questions later on
- Create opportunity for natural upsell (tours, membership, guidebooks)

Staff can find this intimidating, but the best questions are often the simplest...

Quick win questions:

How interested are you in the subject matter?

How familiar are you with the subject matter?

Do you live locally? Where are you from?

Do you have any questions about the visit?

Can I help with anything?

Have you visited before?

Where have you travelled from?

Why did you book the visit?

Did you do any other tours before?

PERSONALISATION: We were asked if we had visited before. When we said no, the staff member showed us the map and pointed out a sensible route to take for those with prams. This was helpful and a good example of personalising our visit.

(Edinburgh Zoo, RZSS)

ATTENTION: I was asked if I had travelled far to reach the site and also asked if I wanted to leave my bag instead of carrying it.

(The Georgian House, NTS)

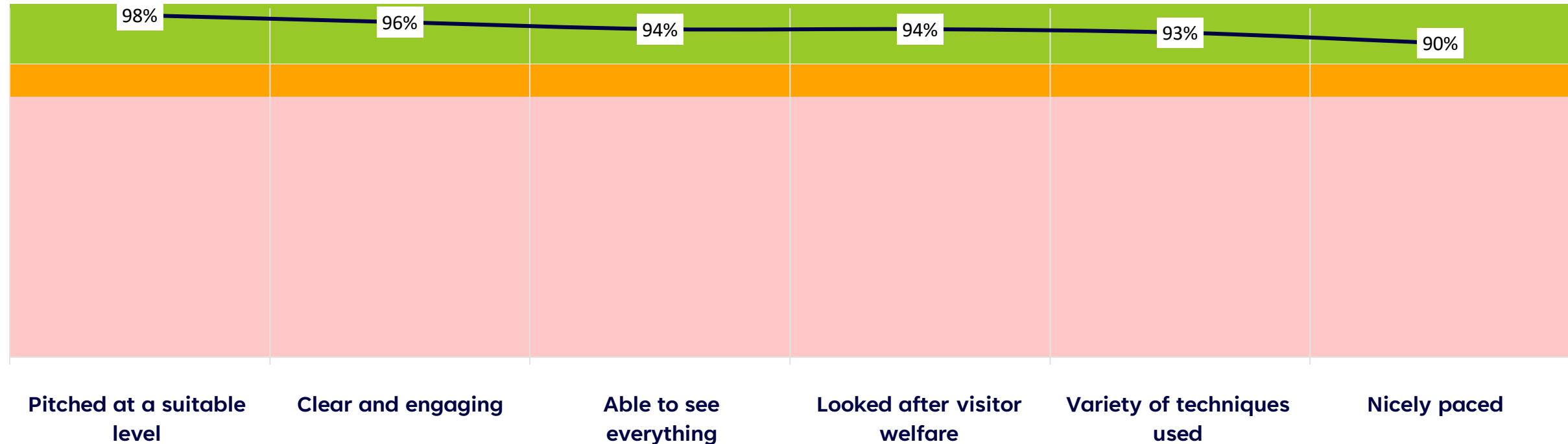
UPSELL: When he was telling us about membership he asked where we were from and was able to then tell us all the lovely places we could visit for free around there if we bought a membership. Great membership promotion.

(The Blackhouse Arnol, HES)

Guided tours drive up the visit experience, and provide an example of how staff can engage with visitors



Guided tour ratings



Examples of great guided tours

A few things that make a guided tour stand out:

- Jokes and humour
- Unique facts and anecdotes
- Tour guides adding their individuality
- Natural enthusiasm of tour guides
- Involving visitors (i.e. encouraging questions, getting them to be part of the storytelling)
- Tailoring communications based on audience

National Portrait Gallery

CLEAR AND ENGAGING: *In addition to giving **clear and well-structured explanations**, she also asked the audience if they knew anything about the paintings. **She also told us some fascinating personal stories linked to the subjects, and also told some jokes which people laughed at. As a result the tour flew by.***



VARIETY OF TECHNIQUES: He used a sombre tone of voice and dramatised some of the stories by **stressing words and altering his tone of voice**. When explaining the city's connection to witches, he took a member of the group to the front to reconstruct what a witch trial would be like, which was entertaining.

Newhailes



PITCHED AT SUITABLE LEVEL: Even though there were a lot of dates and unfamiliar names, **we were able to relate to all of these through storytelling about what went on in their lives.**

We were asked if we had questions in each room and it seemed **the tour was being adjusted to our comments.**

6 ways in which guided tours fall down



Too rushed/strict:

The tour guide finished what she wanted to say then said "I know you want to read the boards but we don't have time" and moved on to the next room.



Too scripted:

She spoke quickly to get through the information which at times, made it feel like she was reading from a script.



Inappropriate language:

The tour guide used language that some may have regarded as xenophobic when referring to World War II

The guide crossed the line with their jokes by using sexist language



Not allowing questions:

I heard them say on at least 3 occasions how there "wasn't time" either about not asking questions on the tour, not spending too long in each room etc



Too impersonal:

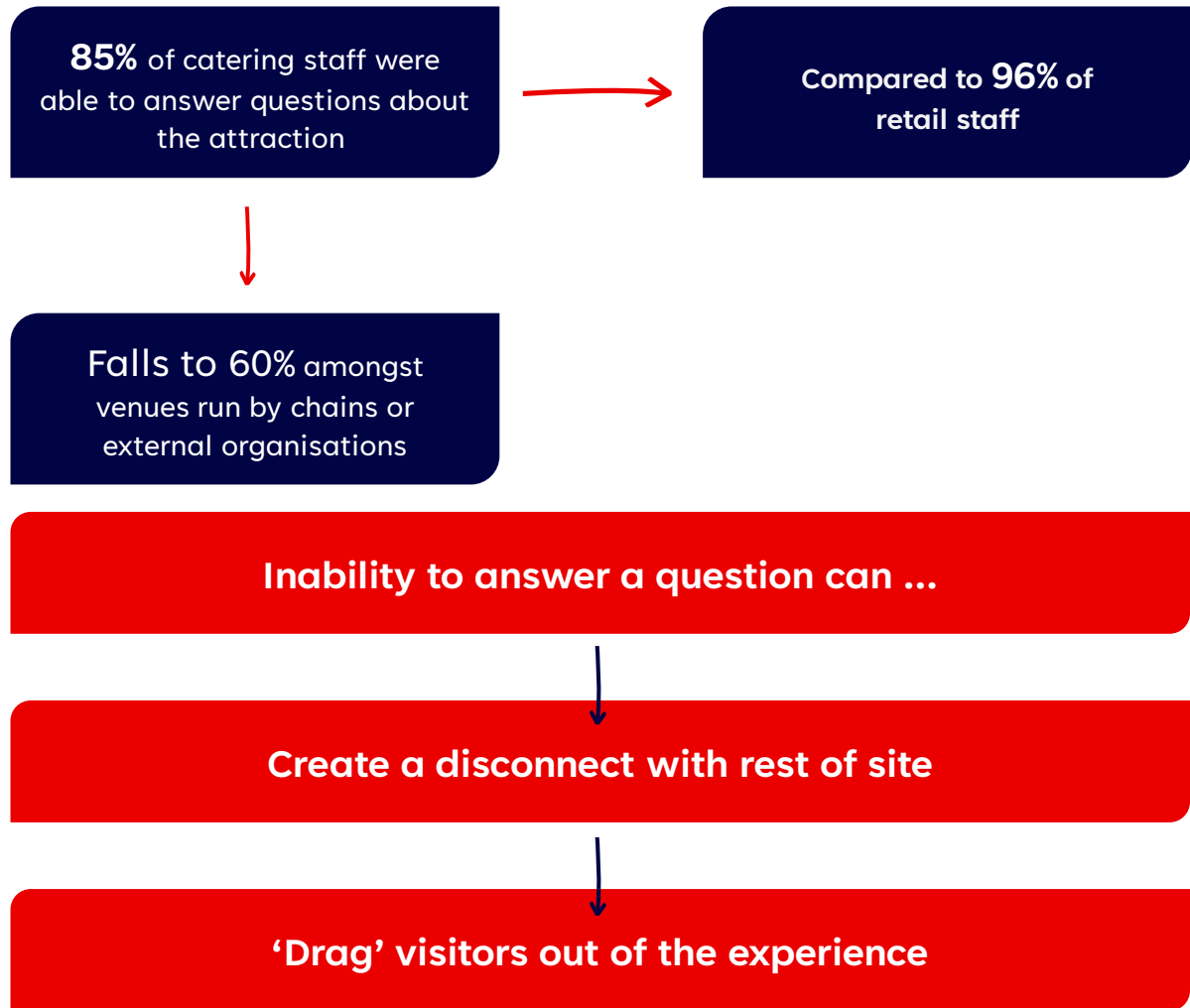
There was a **long, awkward silence** while waiting for two more visitors to arrive, when the tour guide could have engaged with those visitors present



Insufficient thought about welfare:

He did not mention low doorways until the group reached the third room. I noticed one taller guest bang his head and heard him complaining of neck ache during the rest of the tour.

Catering staff often struggle to answer questions relating to the attraction, especially when the catering is run by a chain or third party.



The unnamed catering staff member did not respond to prompting about the attraction except to engage about the cafe and how busy it feels like and if it was expected to get busier during the upcoming school breaks. **The cafe did not feel part of the museum experience.**

I asked the member of staff serving me what time the guided tours were, and she responded - "I don't know - I'd recommend you ask one of the attraction's staff". **This created a disconnect from the rest of the site.**

At the till, we asked the staff member what time the main attraction closed. She said she **knew the cafe shut at 4pm but she did not know what time the attraction closed.**

When asked if the attraction did a guided tour, and the staff member **advised me to ask one of the museum staff.**

I asked the girl clearing the table how long it would take to walk to a certain part of the site. She said **I don't know I just work in the restaurant.**

3

Successes from the MV programme



Congratulations to 2023's Top 5 (so far)...


1st



Mercat Tours

100%


2nd



Culzean Castle & Country Park

98.9%


3rd



Maeshowe Chambered Cairn

98.7%

3rd



Camera Obscura & World of Illusions

98.7%

5th



Robert Smail's Printing Works

98.6%

“

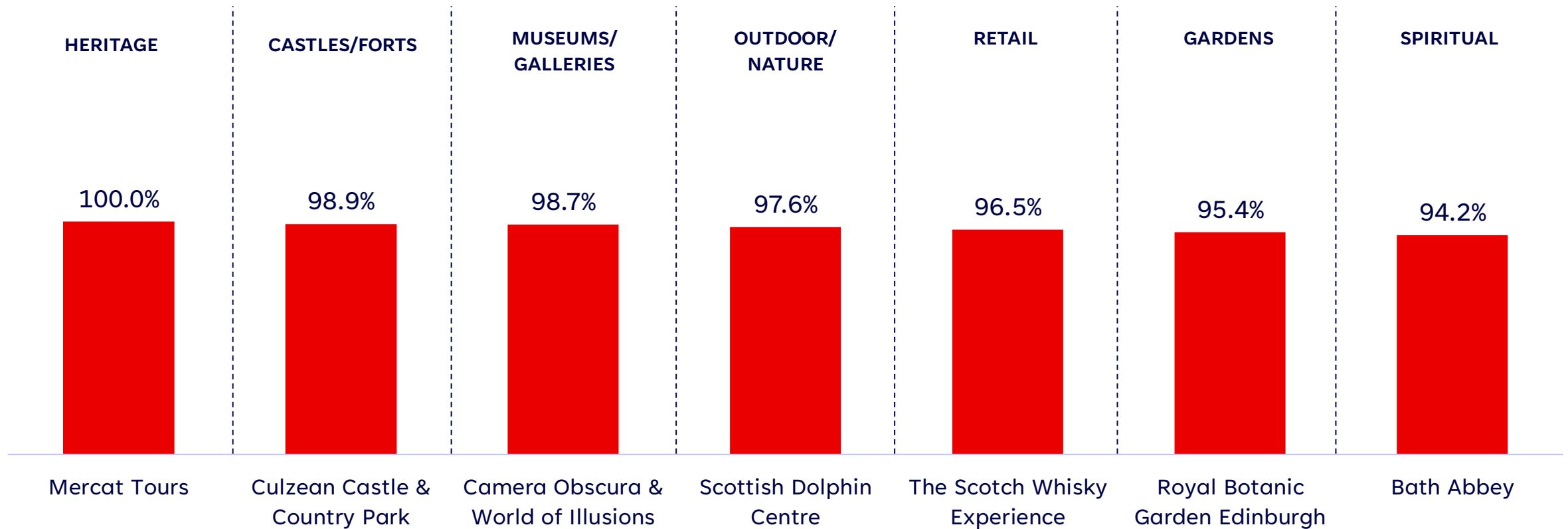
“At the beginning of the tour, he got us to shout out certain things, such as we wanted "blood", which was quite humorous. When explaining the city's connection to witches, he took a member of the group to the front to reconstruct what a witch trial would be like, which was entertaining. In the vaults, he held a candle, which created a more tense atmosphere. On one occasion, he blew out the candle during a story..”

(Mercat Tours)



We are celebrating best practice across a range of sectors

Highest scores by sector (UK wide)



“

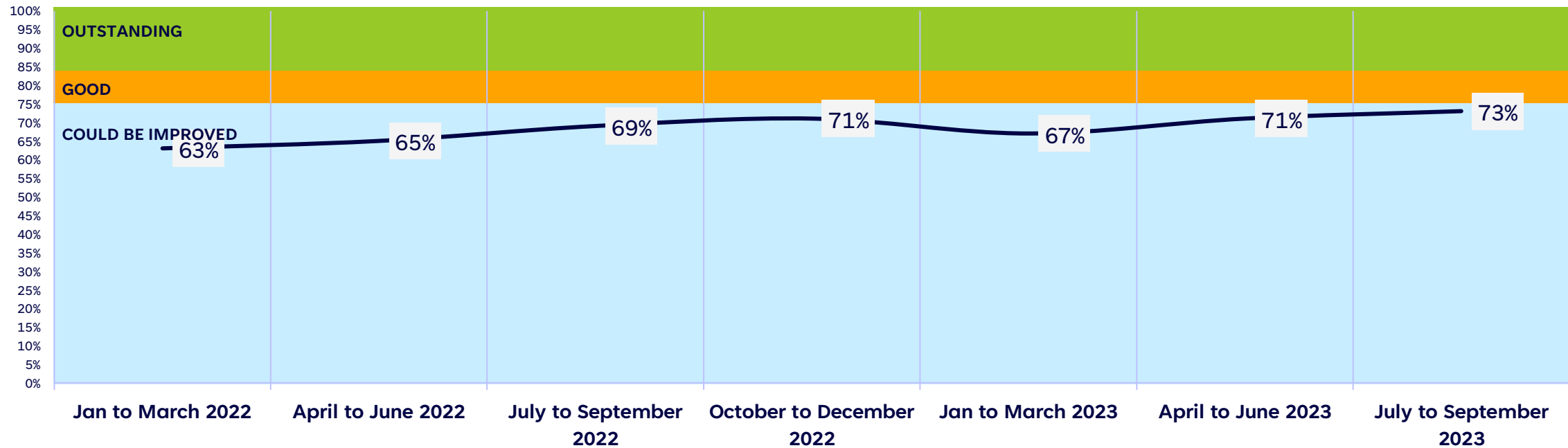
“I felt that every interaction I had with the staff at the Botanic gardens was positive, and I felt as if they valued us being there. The staff member I spoke to at the Welcome Desk treated me as a valued visitor, not just a passing individual. Her attitude was positive and enthusiastic; she showed interest in my query, taking time to listen to me and tell me as much as she could about the tours in a very pleasant and helpful manner. I enjoyed our interaction.”
(Royal Botanic Gardens Edinburgh)

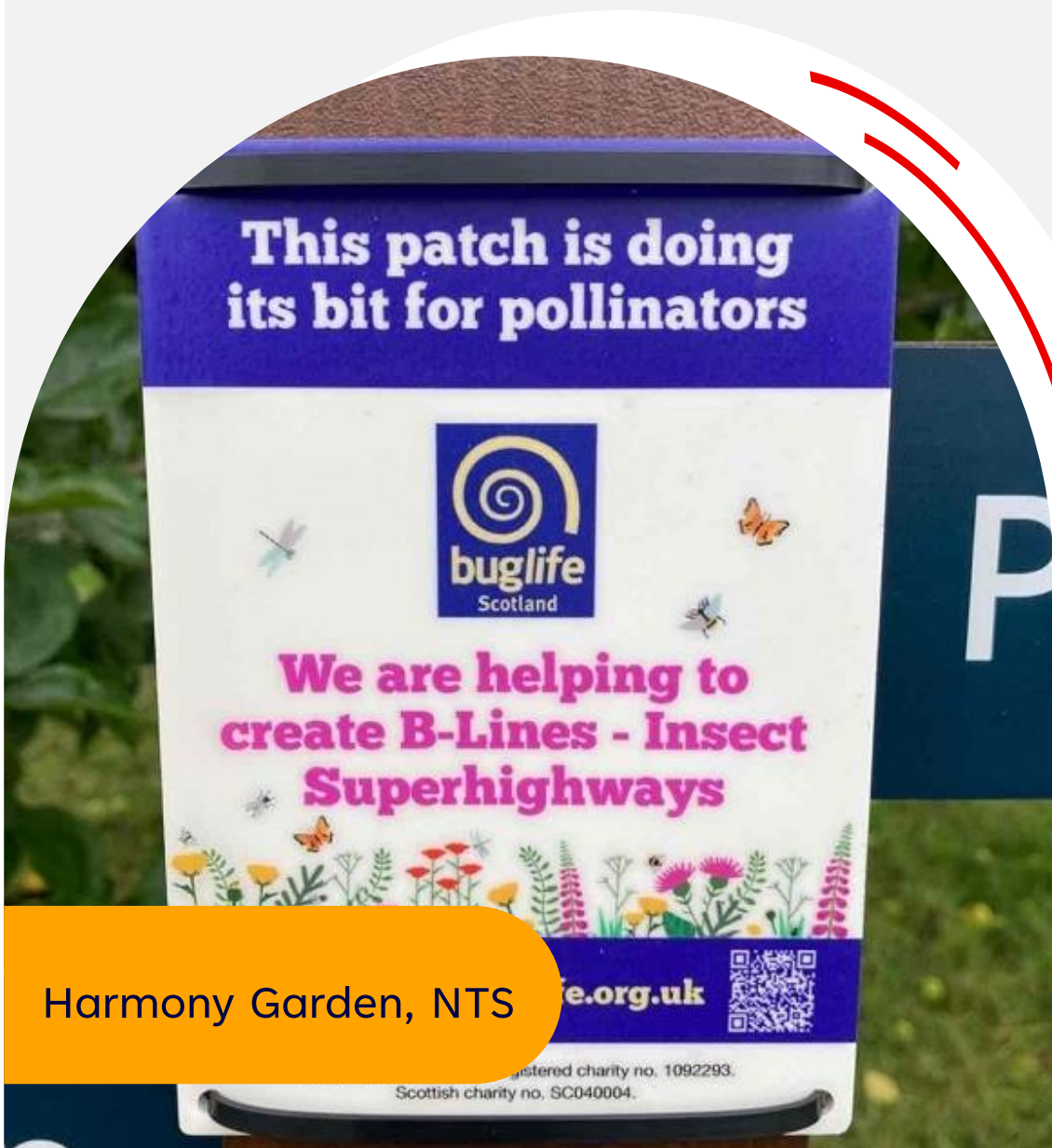


Perhaps one of the main successes of the programme so far, is seeing scores improve over time...

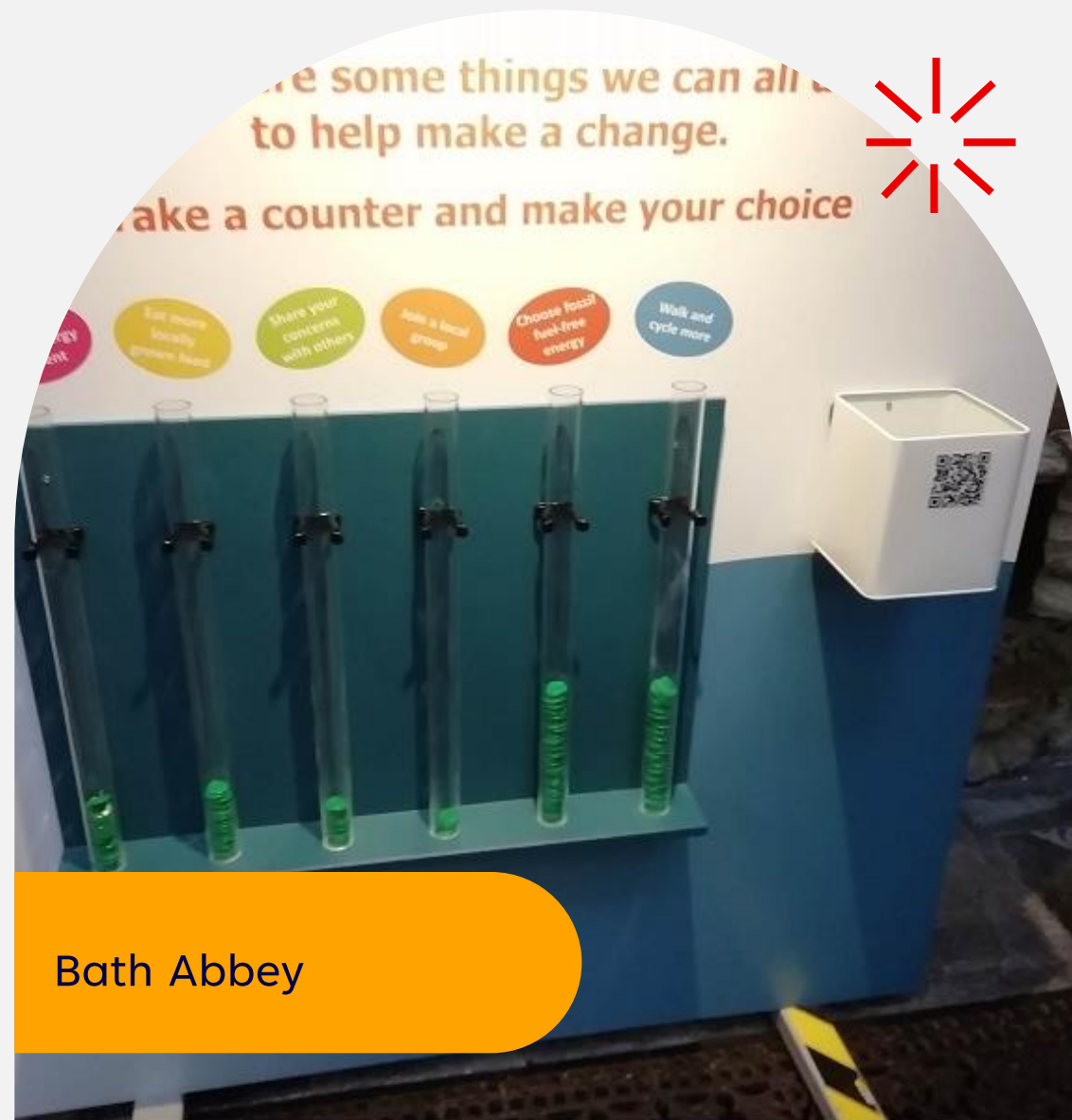


Selected scores over time





Harmony Garden, NTS



Bath Abbey

Skara Brae, HES



Inverewe Gardens, NTS



The Helix Centre



CANNAE FIND THE RECYCLING?



Ask staff how you can recycle at our sites.
Let's keep Scotland green and looking braw!



Edinburgh Zoo



 **Thank you!**

