

# What Are Your Consumers Saying: An Inside Look at Recent Industry Surveys

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Webinar will begin at 2:00 PM EDT,  
please participate in the poll now.



Join us next  
Wednesday, May 20<sup>th</sup>  
at 2:00 PM EDT for  
our webinar on  
Generating Revenue  
by Thinking  
Differently

<https://bit.ly/3ctIVd7>

# Asking Questions

The screenshot displays the Cisco WebEx Event Center interface. At the top, the title bar reads "Cisco WebEx Event Center" and the menu bar includes "File", "Edit", "View", "Communicate", "Participant", "Event", and "Help". The main content area is titled "Event Info" and shows details for the host (Conference Manager), audio connection instructions, and the event number. On the right side, a "Participants (7)" panel is visible, listing "Panelists: 1" (Conference Manager) and "Attendees: 1 (1 displayed)" (Joe Bloggs). Below the participants list is a "Q&A" section, which is highlighted with a red box and a blue circle labeled "1". This section includes a dropdown menu for "Ask:" (set to "All Panelists", highlighted with a blue circle labeled "2"), a text input field for the question (highlighted with a blue circle labeled "3"), and a "Send" button (highlighted with a blue circle labeled "4"). A "Connected" status indicator is shown at the bottom right.

# What Are Your Consumers Saying: An Inside Look at Recent Industry Surveys

Wednesday, May 13, 2020



The background is a solid blue color with a white circuit board pattern overlaid. The pattern consists of various lines, right-angle turns, and small circles representing components or nodes on a PCB. The text 'WEBINAR AGENDA' is centered in the middle of the image.

# WEBINAR AGENDA

# Webinar Agenda

- 90 Minutes in length
- Community discussion and presentation of best practices
- Question and answers from the community
- Press & Public Viewing

# Webinar Wednesdays

3/18: Galaxy Best Practices  
in a Time of Crisis

4/1: Operational Strategies  
for Now and the Next  
Normal

4/15: Reopening Strategies and  
Transitioning to a Capacity  
Managed Attraction

3/25: Managing Pass  
Updates, Renewals and Bulk  
Orders

4/8: The New Guest Journey

4/22: Optimizing the Capacity  
Managed Guest Experience Inside  
Your Attraction

5/6: Pricing the Guest  
Experience in a Post COVID  
World




5/20: Generating Revenue by  
Thinking Differently

4/29: Re-Creating Trust With  
Your Guests and Re-Training  
Your Staff

5/13: What Are Your Consumers  
Saying: An Inside Look at Recent  
Industry Surveys


5/27: Best Practices and Learnings  
From Attractions That Have  
Already Reopened






## COMMUNITY

BLOG COMPANY NEWS CASE STUDIES  
VIDEO TUTORIALS WEBINARS EVENTS  
GATEWAY GET-TOGETHERS




COMPANY CAREERS CONTACT 

SOLUTIONS SERVICES SUPPORT STRATEGY MARKETS BLOG / COMMUNITY LET'S GET STARTED

BLOG COMPANY NEWS CASE STUDIES VIDEO TUTORIALS WEBINARS EVENTS GATEWAY GET-TOGETHERS


### CATEGORY: WEBINARS



**WEBINAR MAY 13: WHAT ARE YOUR CONSUMERS SAYING: AN INSIDE LOOK AT RECENT INDUSTRY SURVEYS**


Published: May 6, 2020  
Webinar Time: May 13 at 2:00 PM EST

[READ MORE →](#)



**WEBINAR MAY 6: PRICING THE GUEST EXPERIENCE IN A POST-COVID WORLD**

Updated: May 8, 2020



**WEBINAR APRIL 29: RE-CREATING TRUST WITH YOUR GUESTS & RE-TRAINING YOUR TEAM**

### NEWSLETTER SIGN UP


Email \*


First Name \*

Last Name \*

Company Name \*

I am a current customer \*

Yes 



# CRM Community Forum

Tuesday May 19<sup>th</sup> 9:00 AM PDT / 12:00 Noon EDT

**CRM + PLUS**  

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**Powered by Galaxy**





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Wildlife and Conservation Principal



# Moderator

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**Gateway**  
TICKETING SYSTEMS®



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Product Communications Manager







# INDUSTRY UPDATE

# Industry Update – Fund Raising Ideas

Home » Fashion+Clothing »

## How Vessi's relief for frontline workers tripled sales

The sneaker brand used feedback from its many healthcare customers to create a program that discounts into donations.

By Daniel Calabretta



In the past five weeks, Vancouver-based footwear company Vessi has used input from its community to launch three COVID-19 relief efforts – which has come with the side effect of tripling its sales.

Based on feedback from its customers, the sneaker company donated more than 2,000 pairs of waterproof shoes to frontline healthcare workers and established a 'pay what you can model' for its customers to help purchase and donate surgical masks to healthcare organizations in both Canada and the U.S.

Tony Yu, co-founder of Vessi, says frontline workers already made up a large portion of the customer base for its

## SUPPORT THE COMMUNITY HEROES

PAY IT FORWARD WITH YOUR NEXT PAIR

Depending on your selection, the profits will contribute towards the Community Fund Program. Purchases made with a discount code are valid for exchanges only.



\$95.00 USD

No Donation

Use code: **PAYITFORWARD**

Get \$40 off each pair and no donation.



\$110.00 USD

Fund: +\$15

Use code: **MAKEWAVES**

Get \$25 off each pair and donate \$15 towards the fund.



\$135.00 USD

Fund: +\$40

No code needed

Get a pair at full price and donate \$40 towards the fund.


SHOP MEN

SHOP WOMEN

## Consumer Chooses

1. Take 100% of sale personally
2. Split sale with charity
3. Give all of sale money to charity

# Industry Update – Reopening and Limiting Capacity



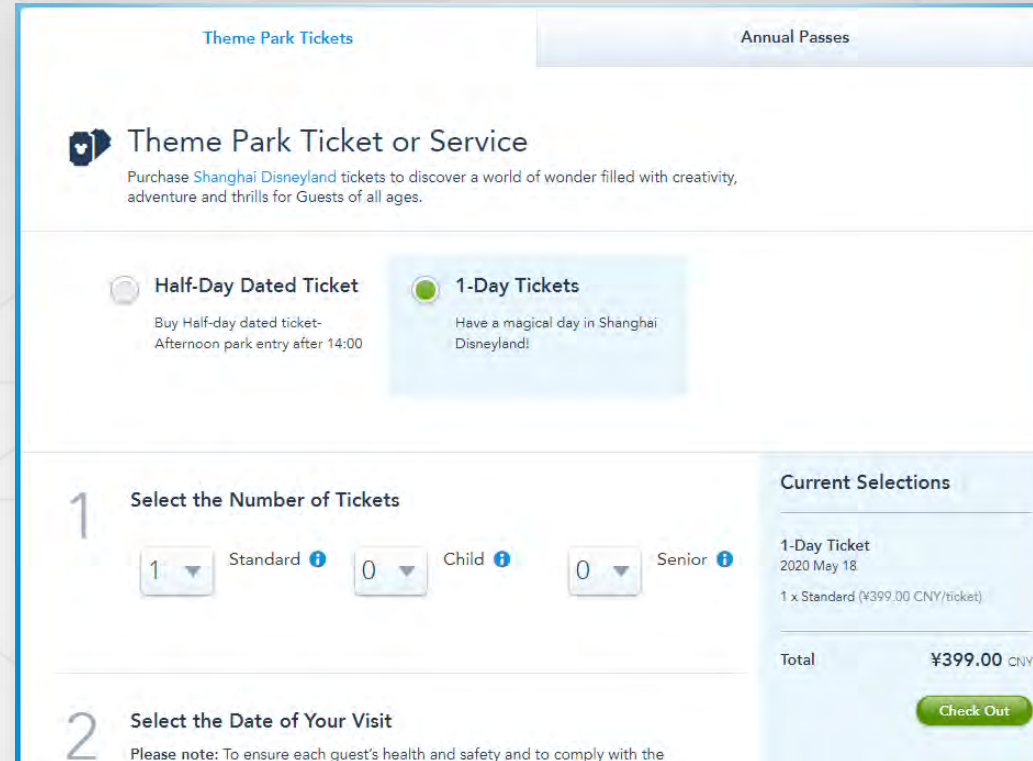
Tourists near Disneyland on May 5, 2020 in Shanghai, China. Hu Chengwei—Getty Images

BY BLOOMBERG  
MAY 8, 2020 5:19 AM EDT

Shanghai Disneyland sold out of tickets for its May 11 reopening after a four-month shutdown, a sign that consumers in China are prepared to spend as the nation recovers from the coronavirus pandemic.

The theme park is implementing safety measures, including limiting visitors to one-third of the normal capacity of 80,000. Shanghai Disneyland was the first of Walt Disney's parks to close on Jan. 25 as the coronavirus began to spread from Wuhan, 520 miles (840 kilometers) west of the country's business capital.

The \$5.5 billion park's reopening marks a tentative **step** toward Disney's recovery from a global health crisis it blamed for lopping \$1.4 billion off profit last quarter, largely by forcing it to shut resorts around the world. While Disney is keeping its U.S., Hong Kong and Paris parks closed, it said Thursday it will **open** a limited number of shops and restaurants in its Disney Springs mall outside its resorts in Orlando, Florida, on May 20.



Theme Park Tickets | Annual Passes

### Theme Park Ticket or Service

Purchase Shanghai Disneyland tickets to discover a world of wonder filled with creativity, adventure and thrills for Guests of all ages.

- Half-Day Dated Ticket**  
Buy Half-day dated ticket- Afternoon park entry after 14:00
- 1-Day Tickets**  
Have a magical day in Shanghai Disneyland!

**1 Select the Number of Tickets**

1 Standard ⓘ 0 Child ⓘ 0 Senior ⓘ

**Current Selections**

- 1-Day Ticket  
2020 May 18  
1 x Standard (¥399.00 CNY/ticket)

Total **¥399.00** CNY

**2 Select the Date of Your Visit**

Please note: To ensure each guest's health and safety and to comply with the

**Check Out**

## Full-Day Tickets

- Sold out until May 18<sup>th</sup>

## Half-Day Tickets

- Sold out until May 14<sup>th</sup>



# Industry Update – Reopening with Social Distancing



[https://www.youtube.com/watch?v=k0JsysX\\_AYY](https://www.youtube.com/watch?v=k0JsysX_AYY)  
<https://twitter.com/gourmetdyy/status/1259706114003709952?s=20>  
<https://twitter.com/gourmetdyy/status/1259693723455115265?s=20>  
<https://twitter.com/CGTNOOfficial/status/1259659489055309825?s=20>



# Industry Update – Insight into Planning

**SEAWORLD PARKS & ENTERTAINMENT**

Please take a moment to share with us your thoughts to better prepare for the reopening of our parks.

17. Which safety measure would make you comfortable attending?

- Park limits attendance to 75% of park capacity
- Park limits attendance to 50% of park capacity
- Park limits attendance to 25% of park capacity
- Doesn't matter as long as I am able to maintain a 6ft distance from strangers

68%

19. Below are various health and safety measures designed to protect our guests and team members. How would you feel if these were implemented by SeaWorld and/or Busch Gardens?

Requires team members to wipe down vehicles/seats between rides

- This is absolutely necessary
- This is expected but not required
- This would not affect me
- This would be a minor inconvenience
- This would be a major problem

72%

Once state governments permit it, Universal Orlando will reopen. How likely are you to consider visiting if the park reopens following its **pre-Coronavirus standard operating and**

Below you will find various measures that could help protect the health and safety of our guests and team members. We would like you to evaluate each of these measures by telling us how you would feel if they were implemented by Universal theme parks.

How would you feel if Universal...  
Requires all **guests** to wear face masks

- This would make me feel more comfortable
- This is a basic requirement for me
- This would not affect me
- This would be a minor inconvenience for me
- This would be a major problem for me

Very likely

Likely

Undecided

Unlikely

Very unlikely

**BILTMORE**

Please Share Your Thoughts

Greetings,

Biltmore is temporarily closed in compliance with current health and safety mandates. We appreciate your understanding of the situation, and look forward to reopening soon.

In the meantime, we'd appreciate your answers on our survey, which should take about 10 minutes to complete. Your thoughts and opinions will help guide our decisions in the days ahead.

Thank you for your continued support, and for your time in responding to our questions. Stay well, and stay in touch.

Sincerely,  
Your Friends at Biltmore

**Take The Survey**

# Industry Update – Insight into Planning

DN



## Six Flags rolls out plan for post-coronavirus 'new normal'

Six Flags CEO Michael Spanos lays out a health and safety plan for when the company's amusement parks reopen following the COVID-19 pandemic.



Guests ride Twisted Colossus at Six Flags Magic Mountain in Valencia. (Courtesy of Six Flags Magic Mountain)

By **BRADY MACDONALD** | bmacdonald@scng.com |

PUBLISHED: April 30, 2020 at 3:32 p.m. | UPDATED: May 6, 2020 at 12:38 p.m.

The new normal at Six Flags Magic Mountain and other locations in the national amusement park chain will include face masks, temperature checks, reduced attendance, virtual queueing, mobile ordering, cashless transactions, social distancing and constant

...

Surveys with Six Flags passholders and members have given the company important feedback on customer expectations in the post-COVID-19 era once the parks reopen.

Half of Six Flags passholders and members surveyed said they would visit the parks today if they were open. Approximately 80% of those surveyed said they would visit a Six Flags park in 2020 if the company implemented health and safety measures.

“Based on our surveys, it seems that our guests are eager to return to our parks,” Spanos said.

Six Flags has developed detailed plans to address the concerns of customers and gain the trust of state and local governments, Spanos said. Preparing the parks to reopen would take 2 to 3 weeks.

Survey feedback indicates passholders and members would feel comfortable returning to a Six Flags park operating at 25% of normal capacity once the coronavirus closures are lifted. Six Flags would ramp up attendance based on state and local guidelines, Spanos said.

...

The top priority for visitors: Sanitization. Six Flags had already stepped up sanitizing its parks before the coronavirus closures. Once the parks reopen, rides will be wiped down throughout the day and hand-washing and hand-sanitizing stations will be installed throughout the parks.

...

<https://www.dailynews.com/2020/04/30/six-flags-rolls-out-plan-for-post-covid-19-new-normal/>





John Hallenbeck  
VP - IAAPA North America

## DISCUSSION TOPICS –

- **COVID-19 RESOURCES**
- **REOPENING GUIDANCE**
- **ADVOCACY PROGRAMS**
- **CONNECTIONS/EDUCATION**
- **INDUSTRY CHALLENGES**



# COVID-19 RESOURCE CENTER – IAAPA.org

- Available to members and non-members
- General resources and region specific information
- Provides the most updated government documents



## Member Resources for COVID-19

As the global attractions industry works through the global COVID-19 crisis together, IAAPA remains committed to providing resources and information to assist members. This page is updated daily with the latest tools and resources from around the world. Members in need of immediate assistance should contact their [Regional Office](#) or email [IAAPA](#).

To learn more about becoming an IAAPA member and benefits available, we invite you to connect with our [Regional Offices](#).

IAAPA Resources	IAAPA Support
<ul style="list-style-type: none"><li>▶ <a href="#">Reopening Guidance: Considerations for the Attractions Industry</a></li><li>▶ <a href="#">COVID-19 Webinars</a></li><li>▶ <a href="#">COVID-19 Educational Series</a></li><li>▶ <a href="#">IAAPA Crisis Communications Plan Template</a></li><li>▶ <a href="#">IAAPA Security Advisory Program</a></li><li>▶ <a href="#">Guidance for Talking to Media</a></li><li>▶ <a href="#">IAAPA Online Member Directory</a></li><li>▶ <a href="#">IAAPA Job Search Resource Center</a></li><li>▶ <a href="#">Professional Development Courses</a></li></ul>	<ul style="list-style-type: none"><li>▶ <a href="#">IAAPA Security Advisory Program: Latest Report</a></li><li>▶ <a href="#">IAAPA Advocacy Resources</a></li><li>▶ <a href="#">IAAPA Asia Pacific Information Exchange Group</a></li><li>▶ <a href="#">IAAPA EMSA Information Exchange Group</a></li></ul>

## Regional Resources

Asia Pacific	Europe, Middle East, Africa	Latin America, Caribbean	North America
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## Canada

- ▶ [Alberta's Relaunch Strategy](#)
- ▶ [COVID-19 Measures Decision Tree](#)

## Government of Canada

- ▶ [Summary of Available Government Programs \(4/8/20\)](#)
- ▶ [Canadian Tax Alert \(4/8/20\)](#)
- ▶ [Support for Employees](#)
- ▶ [Support for Business](#)
- ▶ [Resources for Canadian Businesses](#)
- ▶ [Prevention and Risk](#)

## Canadian Federation of Independent Business (CFIB)

- ▶ [Download Customizable Templates](#)
- ▶ [Small Business Resource Center](#)

## Member Resources and Support

### United States

#### US State Government Resources

- ▶ [COVID-19 State and Local Policy Dashboard](#)
- ▶ [State Unemployment Information \(3/24/2020\)](#)
- ▶ [Small Business Loan Assistance in Florida \(3/17/2020\)](#)

#### US Department of Labor

- ▶ [Guidance on Preparing Workplaces for COVID-19](#)

#### Coronavirus Aid, Relief, and Economic Security (CARES) Act

- ▶ [What's in the CARES Act](#)
- ▶ [CARES Act Eligibility](#)
- ▶ [CARES Act: Paycheck Protection Program vs. Economic Injury Disaster Loan](#)
- ▶ [CARES Act: Exchange Stabilization Fund](#)
- ▶ [Unemployment Compensation FAQs](#)

#### Families First Coronavirus Response Act

- ▶ [Families First Coronavirus Response Act: Questions and Answers \(3/25/2020\)](#)
- ▶ [Families First Coronavirus Response Act: Employer Expanded Family and Medical Leave Requirements \(3/25/2020\)](#)
- ▶ [Families First Coronavirus Response Act: Employee Paid Leave Rights \(3/25/2020\)](#)

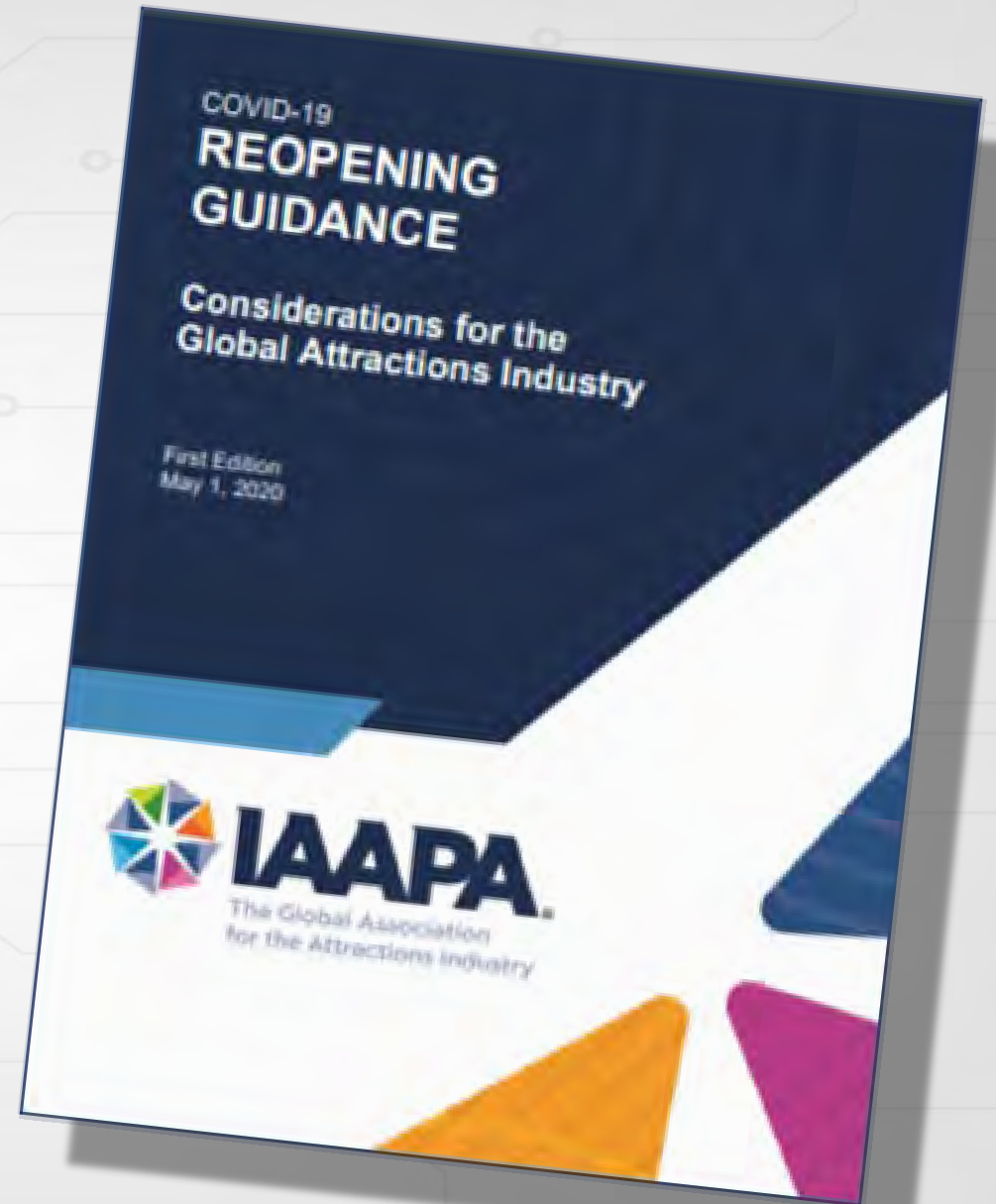
#### Large Business Resources

- ▶ [Guide to Main Street Lending Program](#)
- ▶ [Main Street Lending FAQs \(4/30/20\)](#)
- ▶ [Main Street New Loan Facility \(4/30/2020\)](#)
- ▶ [Main Street Expanded Loan Facility \(4/30/2020\)](#)



# REOPENING GUIDANCE

- Creates a foundation that can be personalized
- Collaboration from many sources, companies & people
- Focus is on employee and guest responsibility



# IAAPA ADVOCACY PROGRAMS

- Letters sent directly to government officials
- Collaboration with other associations/organizations
- Lobbying for industry assistance (Federal/State)

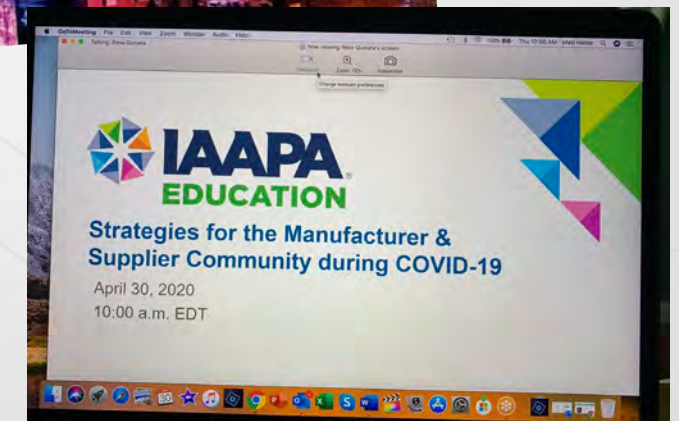
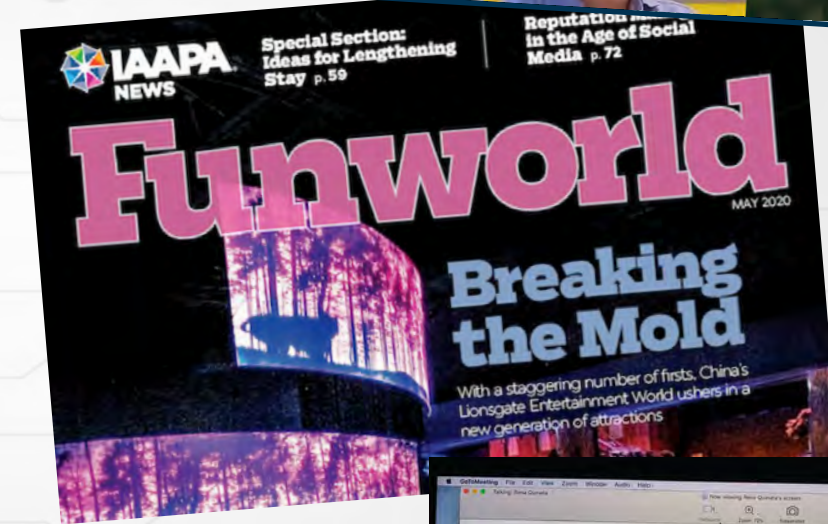


**JOIN NOW: [iaapaaction.org](http://iaapaaction.org)**



# CONNECTIONS / EDUCATION

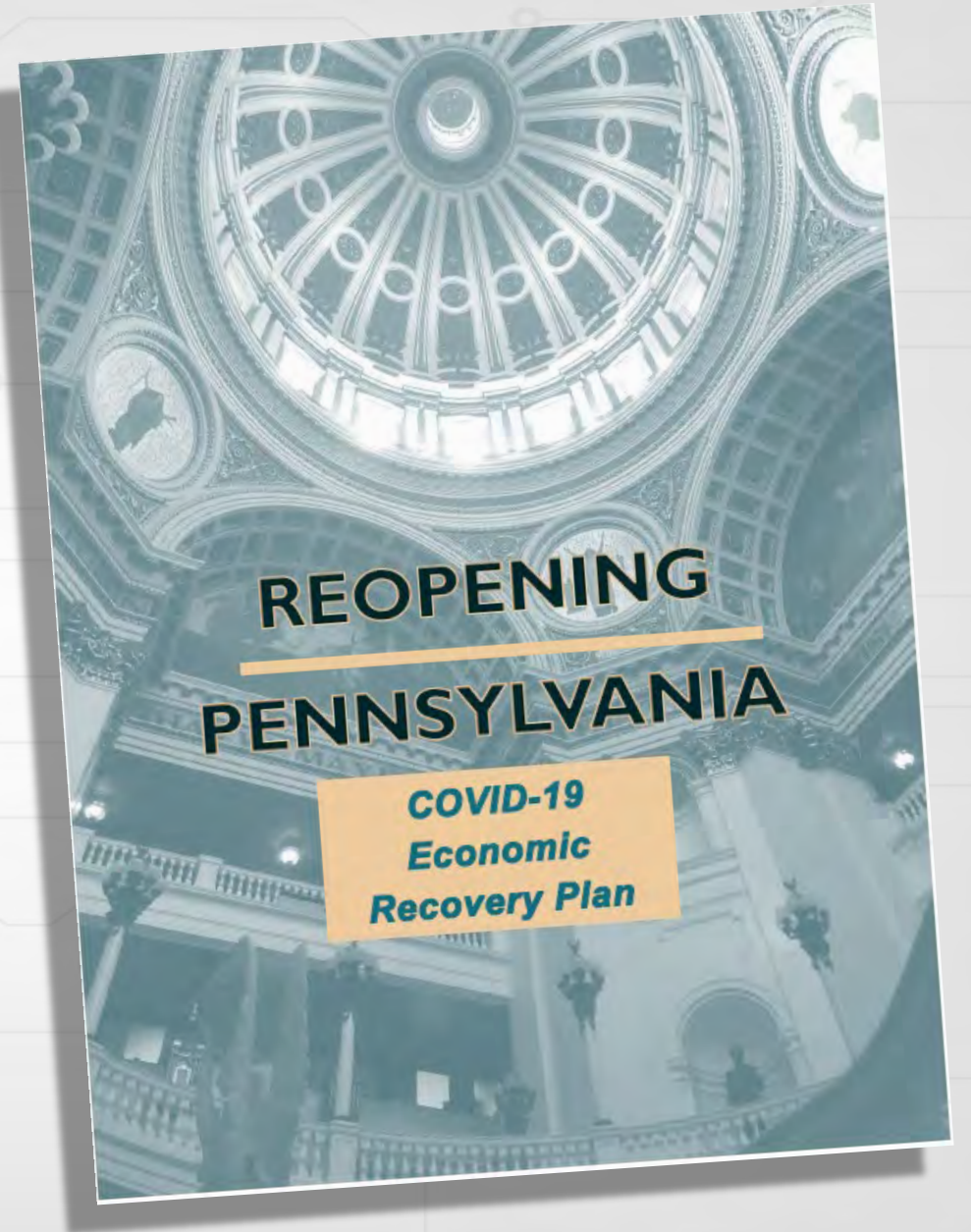
- Webinars, Facebook Live, Twitter Chat, Newsletters
- Educational programs provided online
- IAAPA North America / Canada Exchange groups





# INDUSTRY CHALLENGES

- **Liability protection for businesses**
- **Continuation of government programs, new legislation**
- **Placement of attractions in State/Local reopening plans**





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The Global Association  
for the Attractions Industry

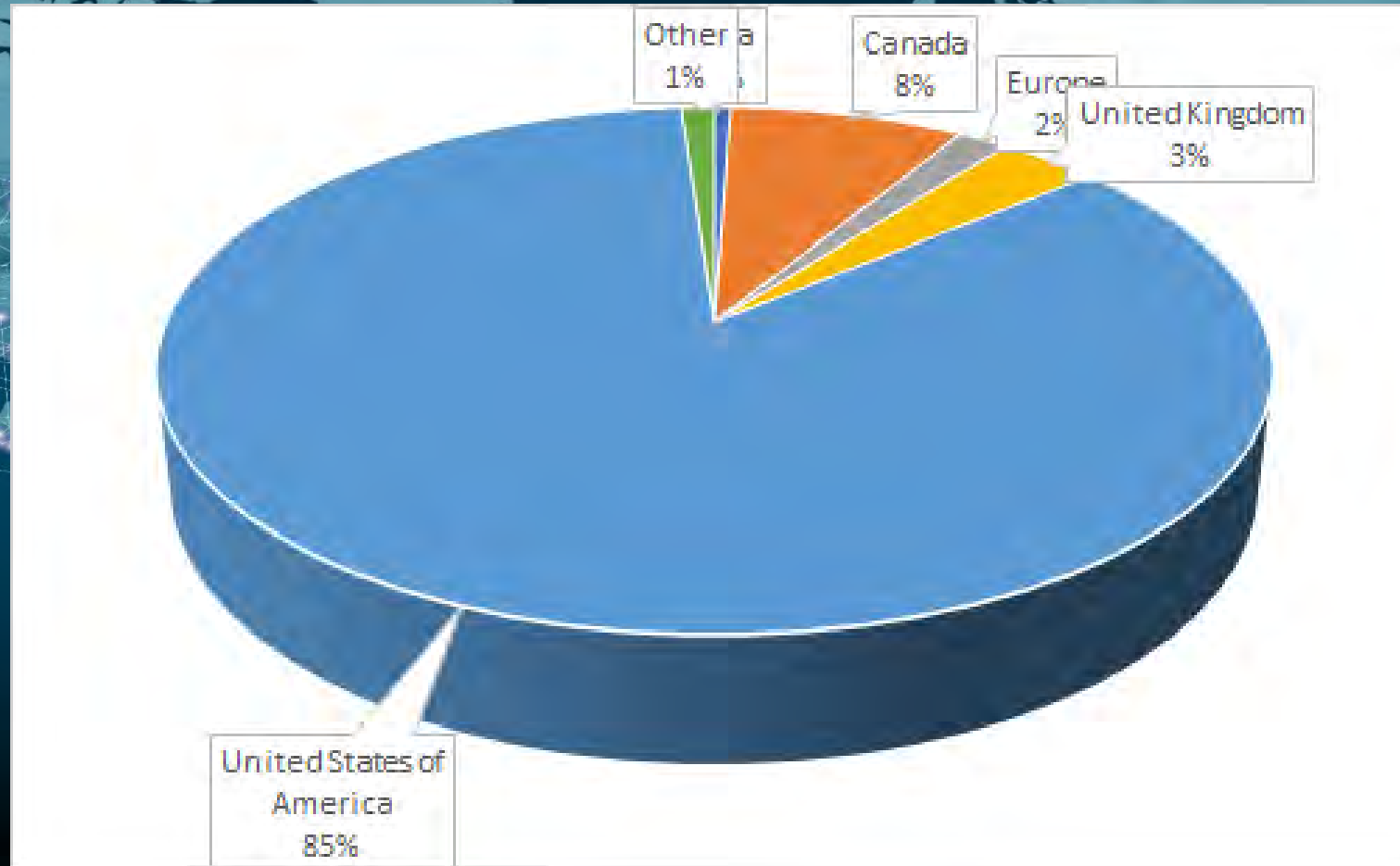
John Hallenbeck

VP - IAAPA North America

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Website: [IAAPA.org](http://IAAPA.org)

# Where are you joining us from today?

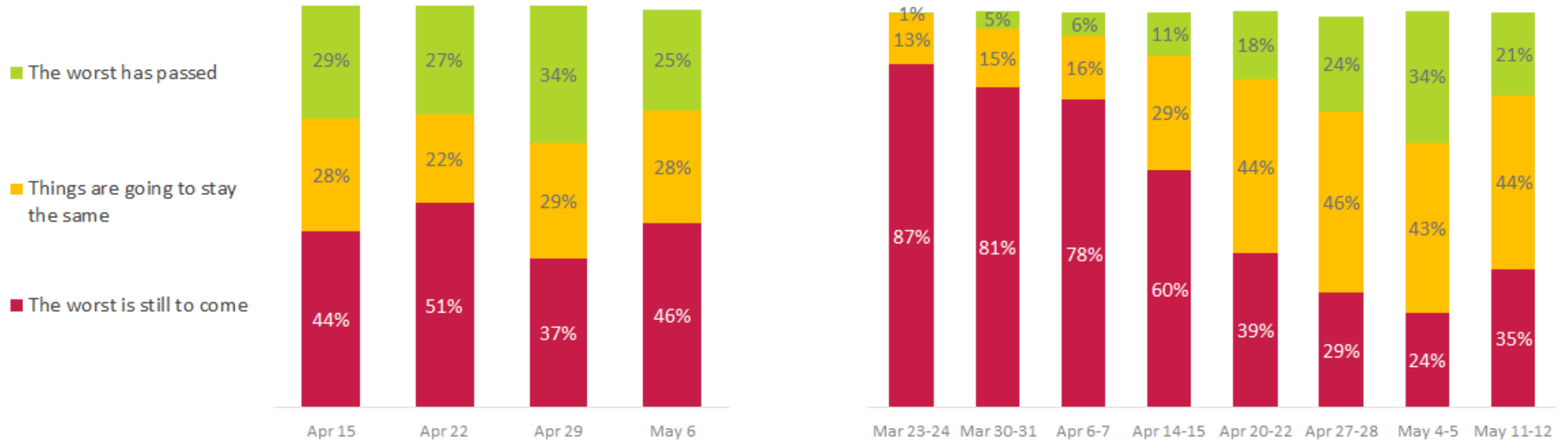




The background is a solid blue color with a subtle, white, circuit board-like pattern. The pattern consists of various lines, right-angle turns, and small circles, resembling a printed circuit board (PCB) layout. The lines are thin and light, creating a technical and digital aesthetic.

# CONSUMER INSIGHTS

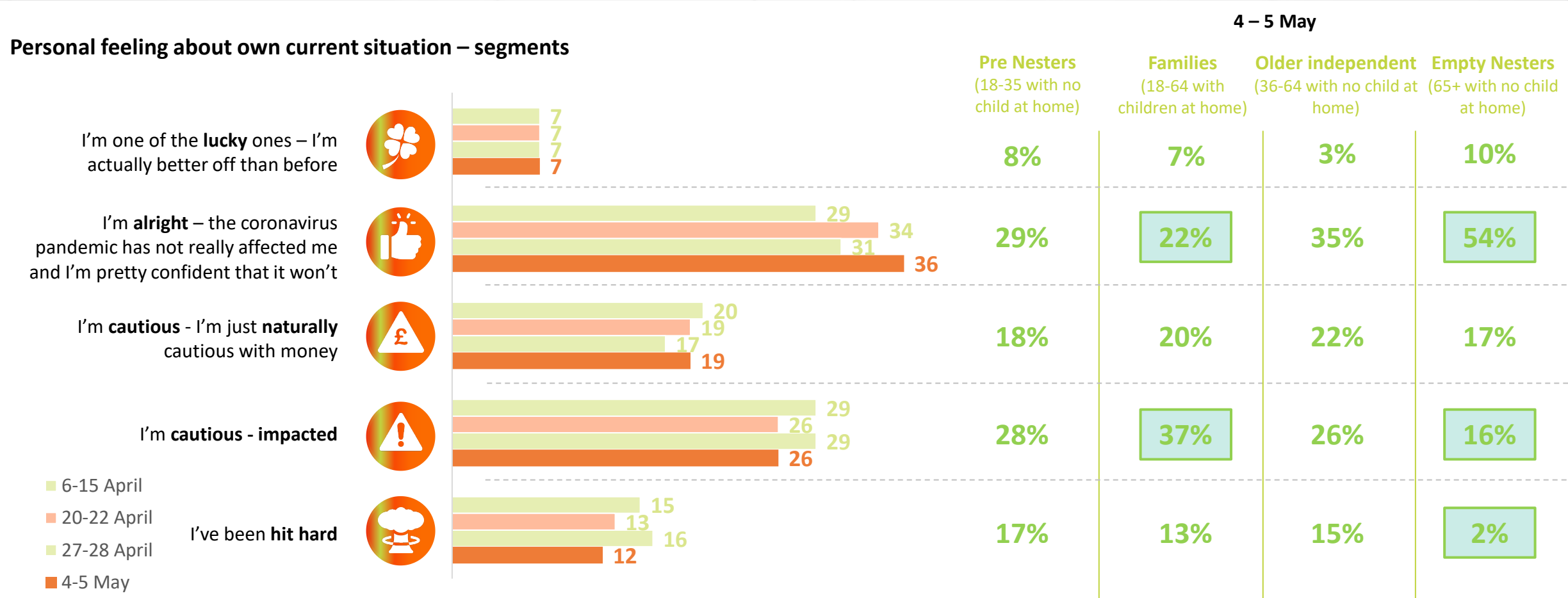
For Americans, the feeling that the worst is still to come has fluctuated between a high of half and a low of about a third. In contrast, Britons have reported a consistently improving outlook.



Q7: Regarding the situation of Coronavirus in the US/UK and the way it is going to change in the coming month, which of the following best describes your opinion?

Source: BVA BDRC United States. Sample size per wave n=500 in US and UK.

# Financial mindsets are at their most positive in 4 weeks of tracking, but with very different results remaining evident across life stages. 'Pre-nesters' and families with children at home are bearing the financial brunt of this crisis.

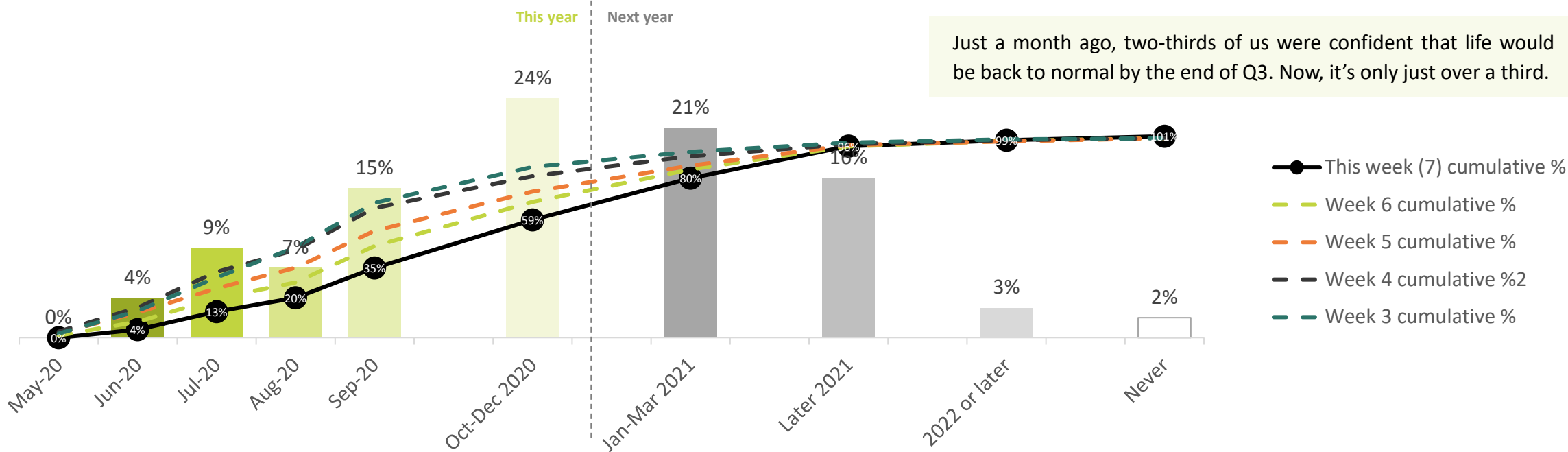


Q17: If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?

Q18: Some people are just naturally cautious with money. Others have become cautious, because of their financial situation during the coronavirus pandemic. Which one of the following best describes you?

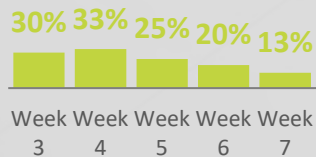


# Despite our growing optimism about the crisis in general, forecasts of when life will return to normal are edging backwards every week. 2 in 5 of us now say that life won't return to normal until 2021 (or later).

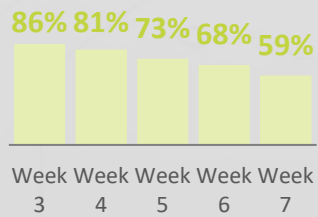


July 2020

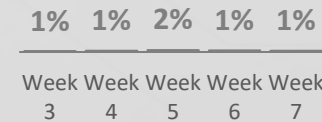
Total %  
Expecting  
Normality by...



This year



Never



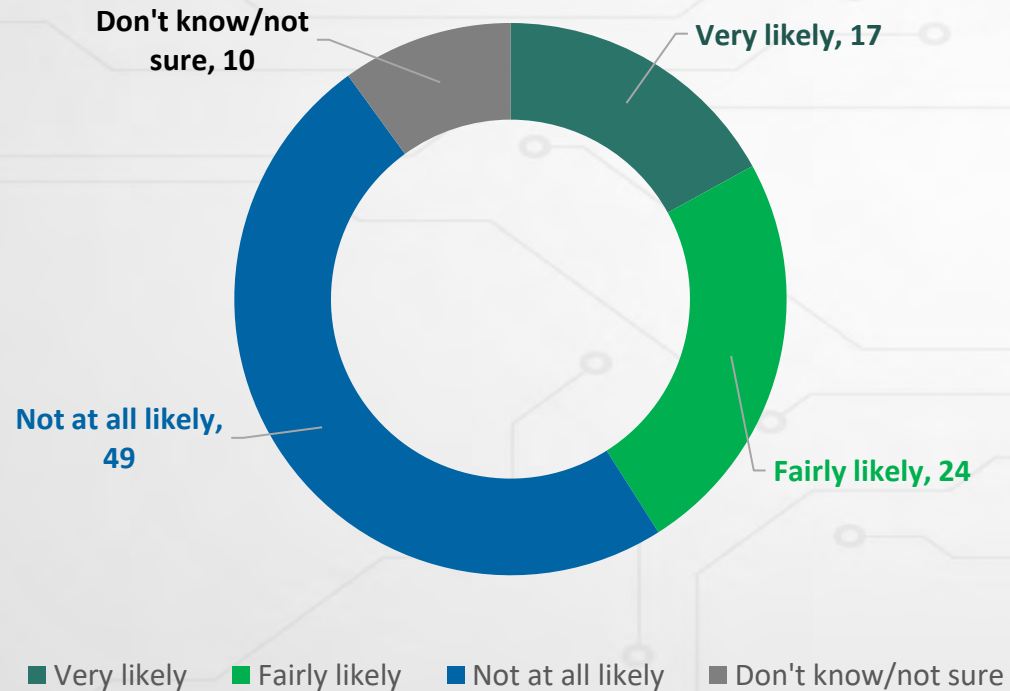
Q16: Given what you know today, when do you think life will return to something close to normal?

ALLIGATOR

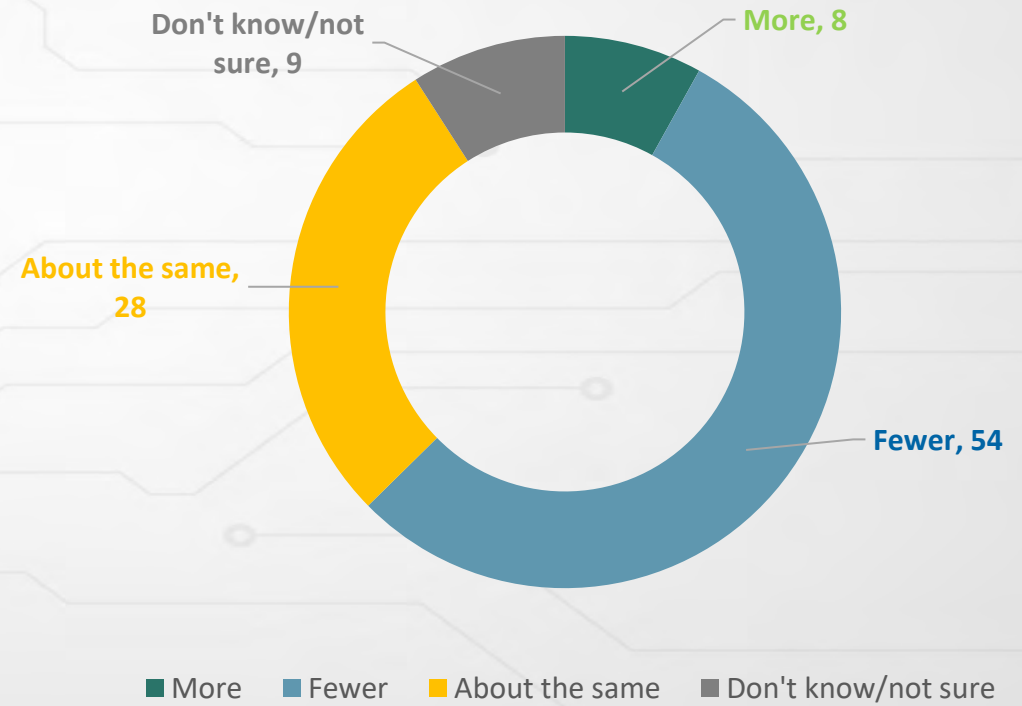


**Worryingly, nearly half are not at all likely to take a UK trip this summer, and over half say they will take fewer UK trips this summer, only 8% more.**

Likelihood to take a UK trip this summer (%)



Number of UK summer holidays compared to normal (%)



**One third of Americans plan to visit an attraction in the next 3 months compared to about one-in-five Britons. Americans are about twice as likely as Britons to visit a museum in the next three months.**

Expected timeline of *day out* leisure activities: *within the next 3 months*

**Go on a day out to a visitor attraction**

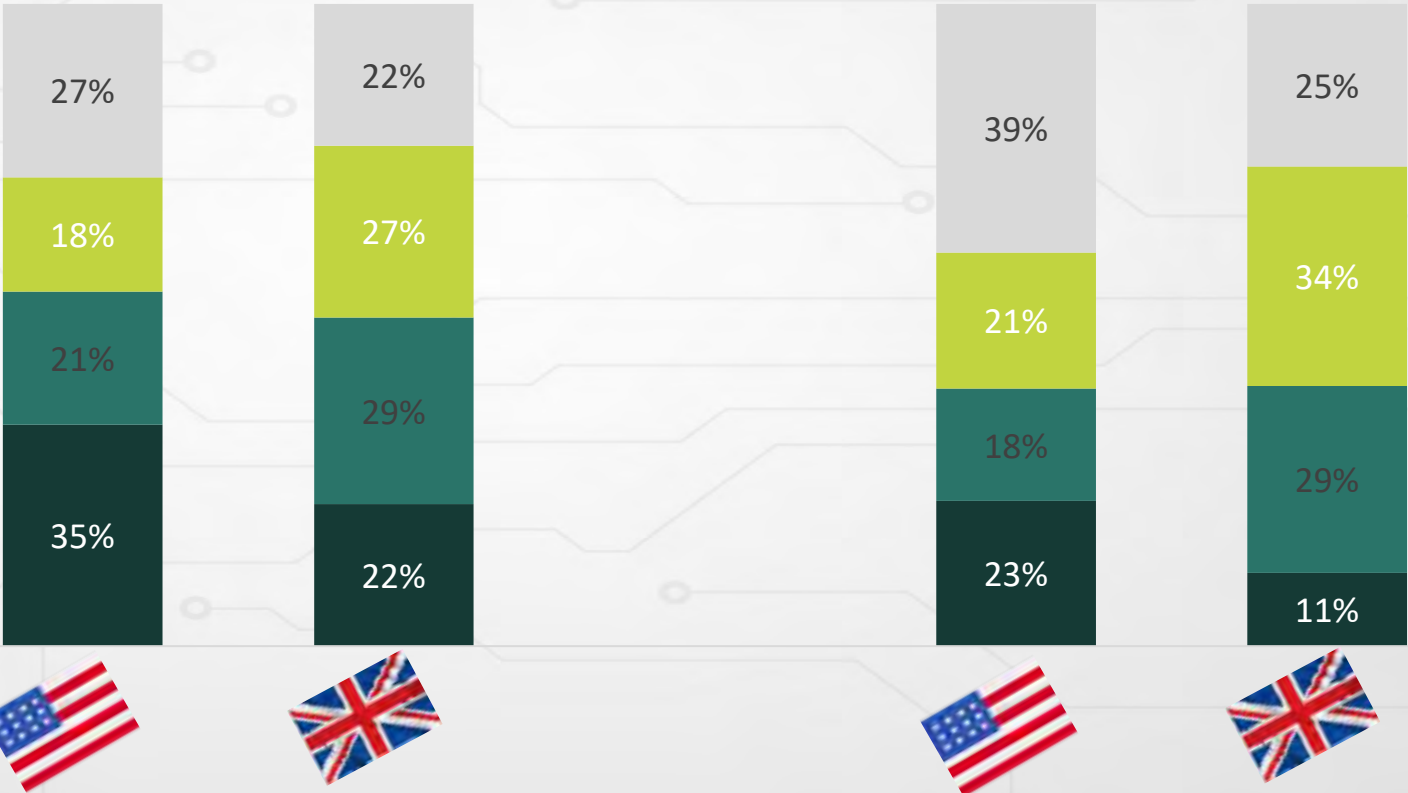
**Visit a museum or a cultural venue**

Not sure, but is something I would like to do

Within 6 to 12 months

Within 3 to 6 months

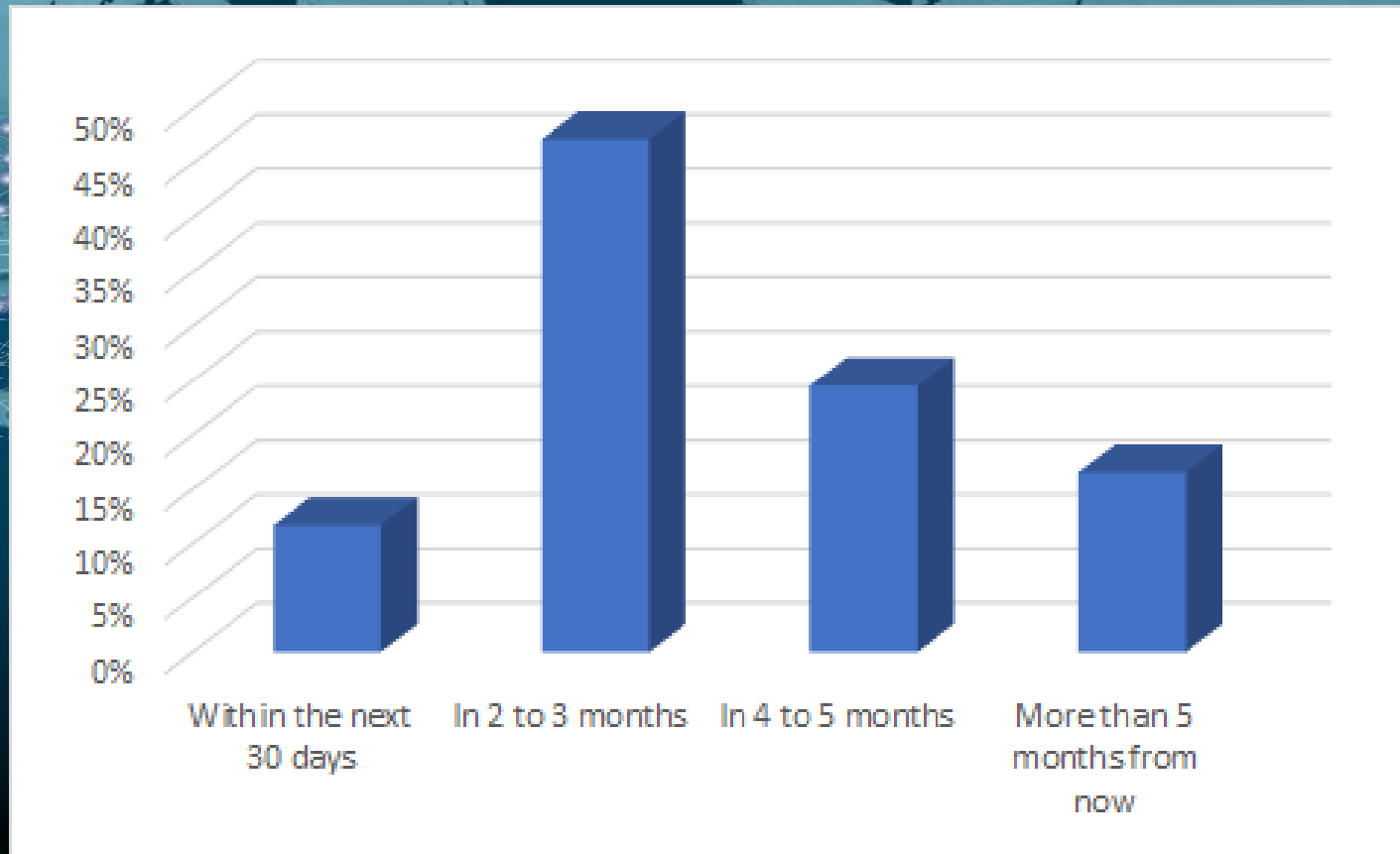
Within the next 3 months



Q. Given what you know today, when do you anticipate doing the following?  
 Among those who intend to engage in the leisure activity.  
 Sample size base n=500 per wave.

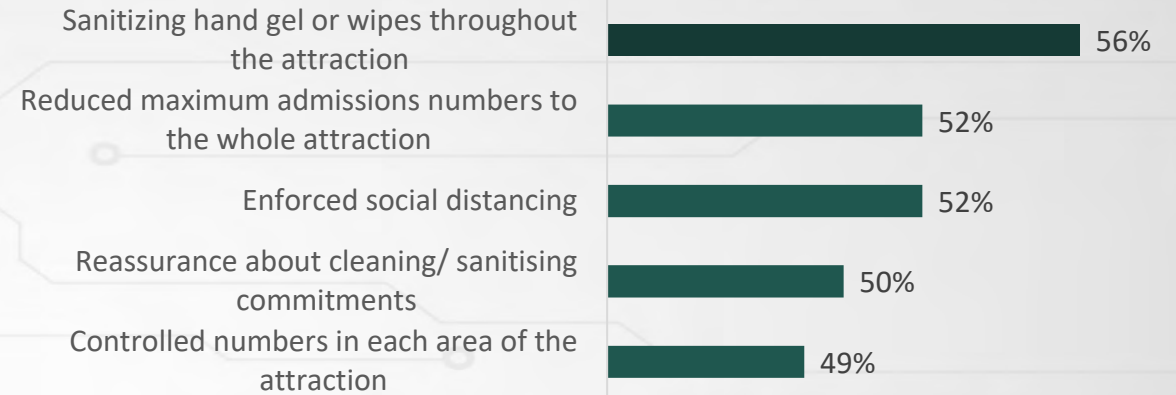
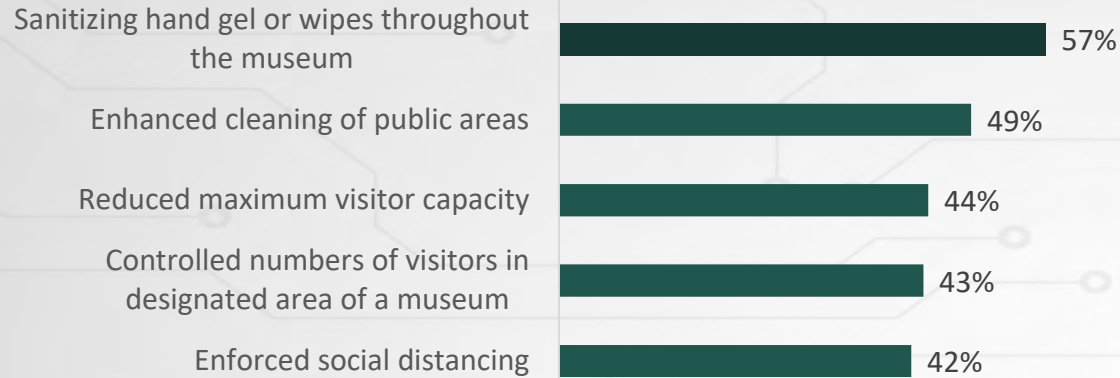


# When do you believe you'll next visit an attraction?

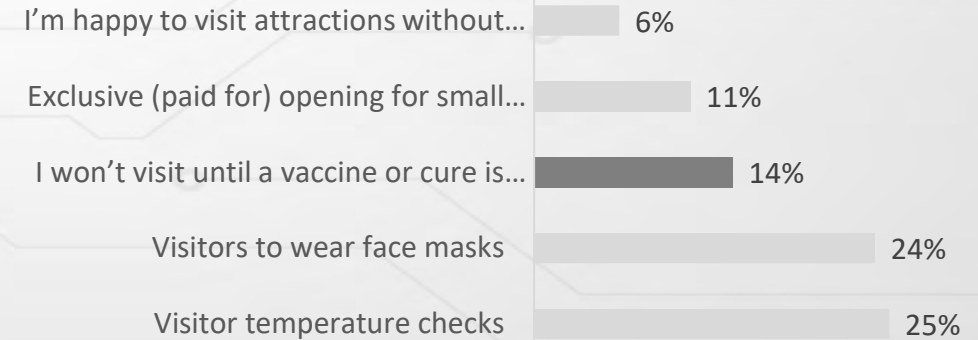
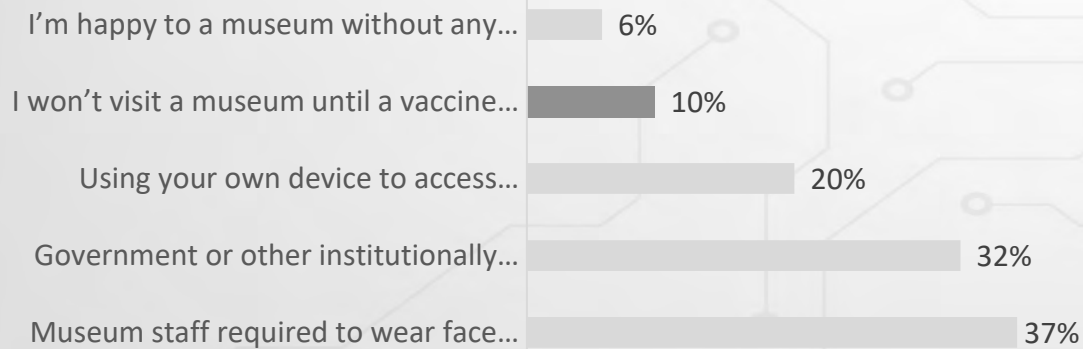


# Both Americans and Britons can generally agree on what they expect from museums/visitor attractions when they next visit after the lockdown has been lifted.

## Top 5 conditions

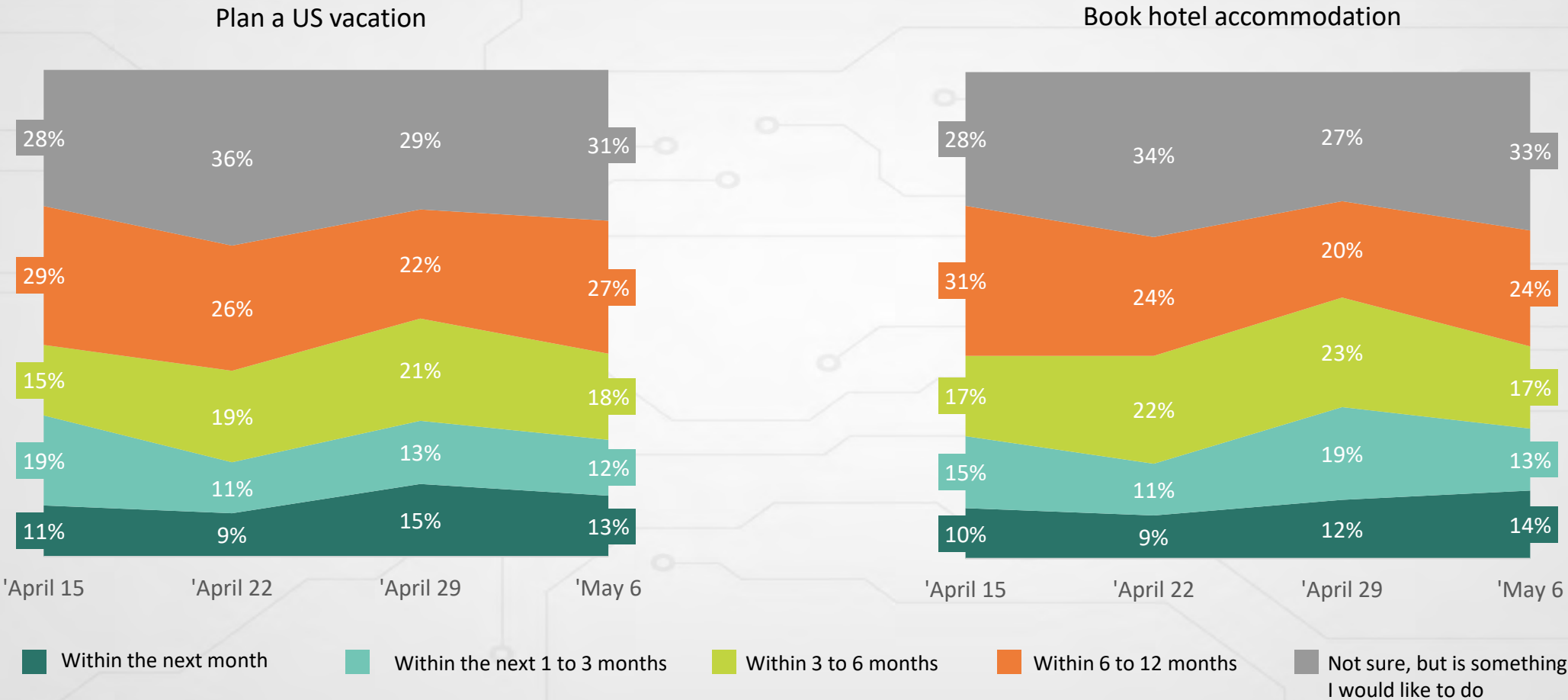


## Bottom 5 conditions



Q35: Which, if any, of these conditions would need to be met before you personally would consider going to a visitor attraction immediately after the lockdown has been lifted? WEEK 6 SLIDE SHOWN FOR CONTEXT

**After several weeks of lockdown, Americans' anticipation of upcoming travel has ebbed and flowed. In early May one-in-ten anticipate planning a US vacation in the next month and a similar level are planning to book a hotel. However, a third of Americans in May were unable to specify a timeline for their next vacation or hotel booking, highlighting the uncertainty about travel for many.**



Q. Given what you know today, when do you anticipate doing the following?  
 Among those who intend to engage in the leisure activity.



# Key take-outs from the UK market (*Wave 1: 20-24 April*)

Market is highly cautious overall – waiting to see how well attractions handle the re-opening phase before committing to visits

How well we deal with fears over crowds and our ability to implement and police distancing measures on-site will determine our success

Therefore, all attractions need to take the time to get it right (could these inform a ‘kite mark’?):

- Limiting numbers of visitors on-site at once
- Be seen to be implementing and policing distancing measures on-site (not just lip-service), including toilets
- Consider only opening cafés and play facilities where distancing can be policed
- Can we be more flexible on providing picnic facilities in the short term?
- Hand sanitiser around the site and staff visibly cleaning
- PPE is more polarising, especially if compulsory for visitors

Moving elements of the visit experience outside, where possible, will undoubtedly help generate visits – outdoor kiosks, tours or even perhaps small events

# Key take-outs from the UK market (*Wave 1: 20-24 April*)

Visitor-facing staff can have a hugely positive impact – providing a warm welcome and showing patience with visitor concerns

Pre-visit communications with the public is vital to support on-site actions:

- Can we use the trend for virtual online visits to demonstrate policing of distancing and other measures on-site?
- Any messaging around creating perceptions of physical open spaces, whether outdoor or indoor

We shouldn't assume that older visitors will take longer to return. They are amongst the keenest to come back, but perhaps need the most reassurance

Evidence of some increased altruism in the market presents some opportunities:

- Visitors are not expecting blanket price discounting
- Good time for donation asks, with altruism higher among young people and families at present

Some positive Membership opportunities:

- Current members are feeling particularly altruistic right now, again, a good time for donation asks
- Potentially a good time for recruitment, with the public likely to remain in the UK this summer
- Additional exclusivity benefits? *Priority booking, member-only days (visit limit), member-only indoor access?*

# Next steps

Run the research again periodically when we predict that there could be a material change in sentiment.

- Wave 2 scheduled for 13-18 May, with results webinar on 22 May
- Additional questions on public transport, interactive exhibits and 'kite mark'
- Further wave(s) in lead up and to and shortly after re-opening, as the public reacts to the new visiting environment and initial successes or otherwise

Full report for Wave 1 at:

<https://decisionhouse.co.uk/uncategorized/alva-attractions-recovery-tracker/>



# Key findings from revisit study



Most likely to visit upon reopening: **Zoos**



Least likely to visit upon reopening: **Trampoline Parks**



Greatest deterrent to visiting attractions: **Discomfort being in public**



Other reasons not to visit: **Disinterest in visiting attractions**



Sanitation modifications to increase comfort: **Sanitizer and masks**



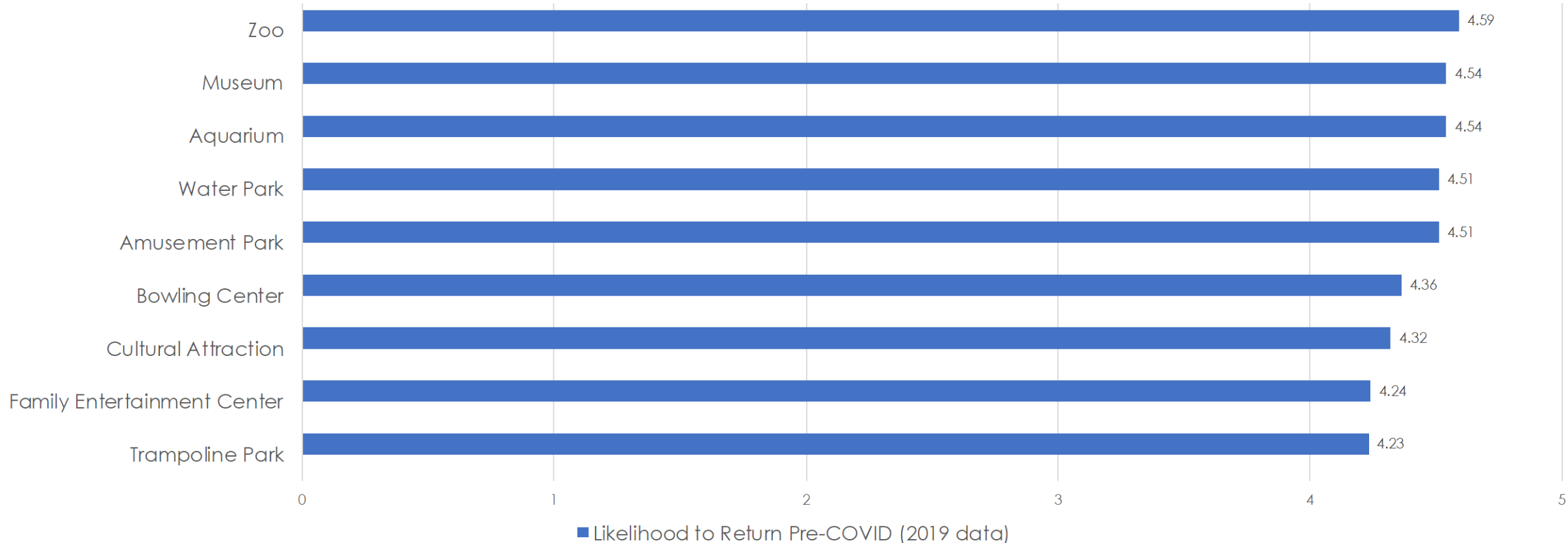
Greatest change expected upon opening: **Reduced capacity**



Additional changes expected: **Staff members' temperature taken**

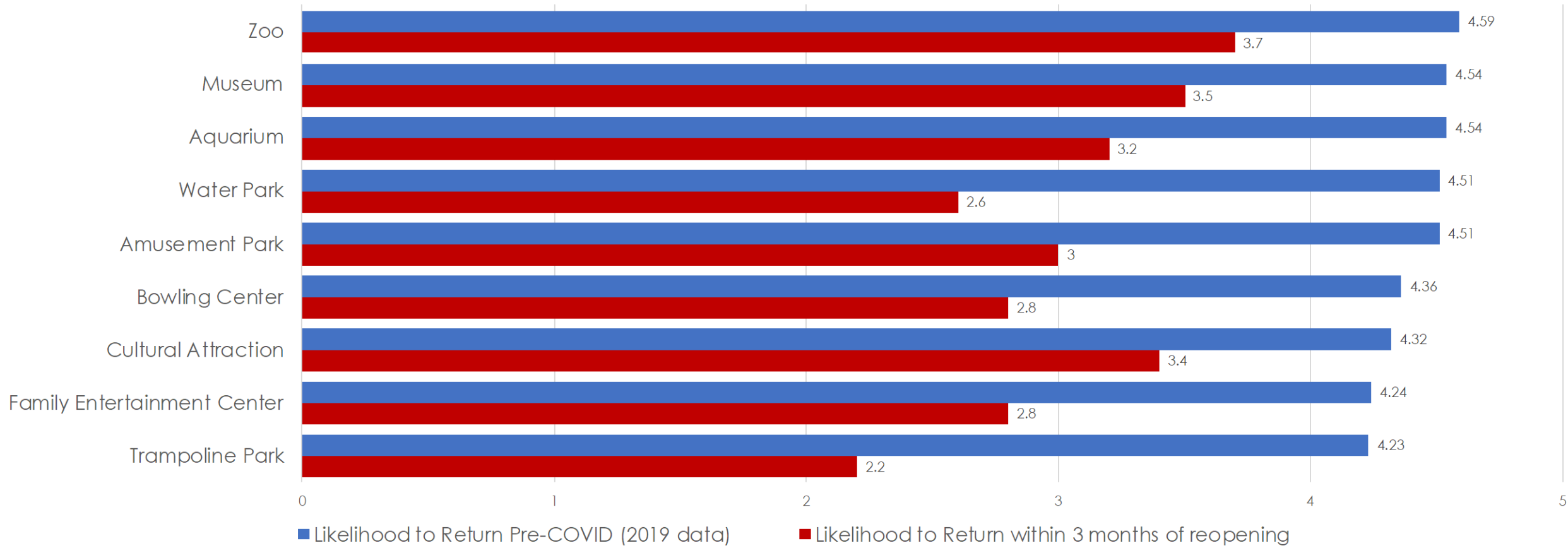
# Likelihood to Return

## Likelihood to Return



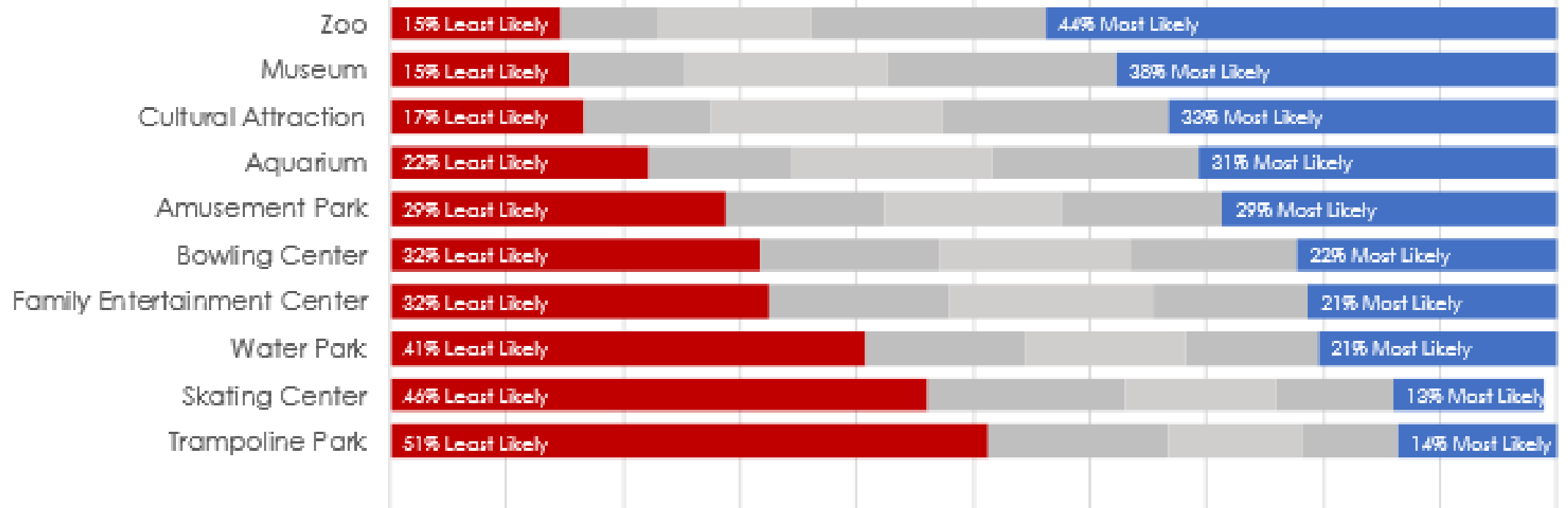
# Likelihood to Return

## Likelihood to Return



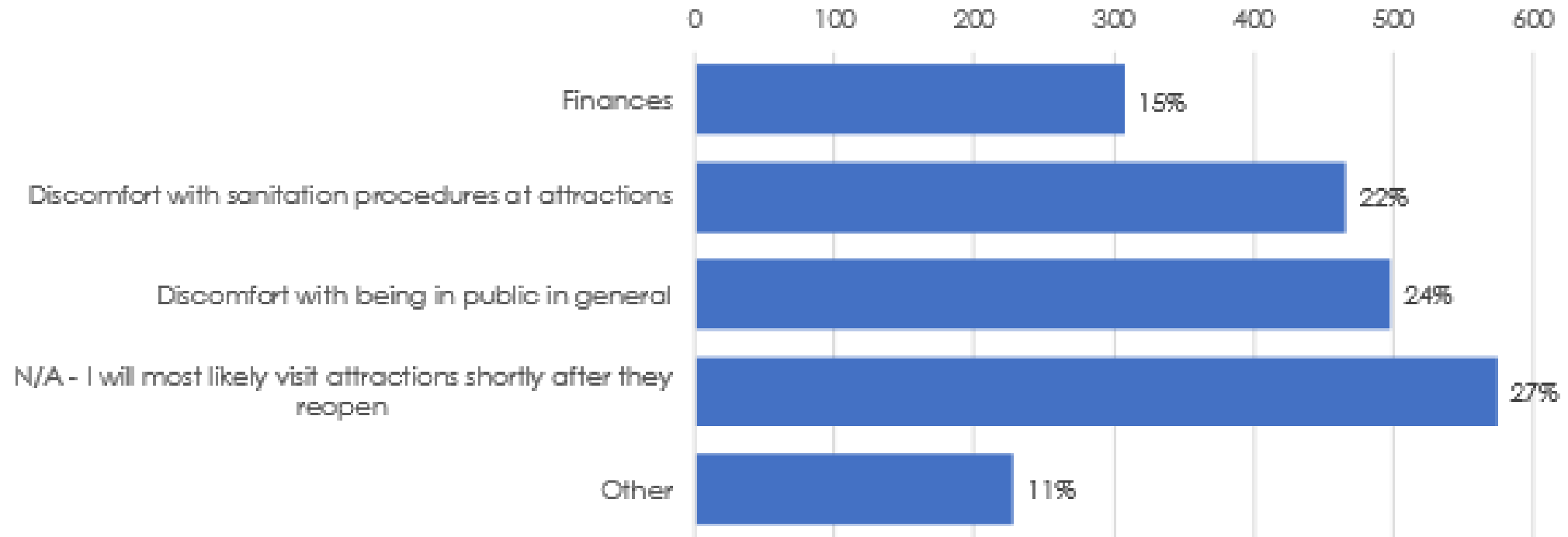


# How likely are you to visit ... within 3 months of reopening?



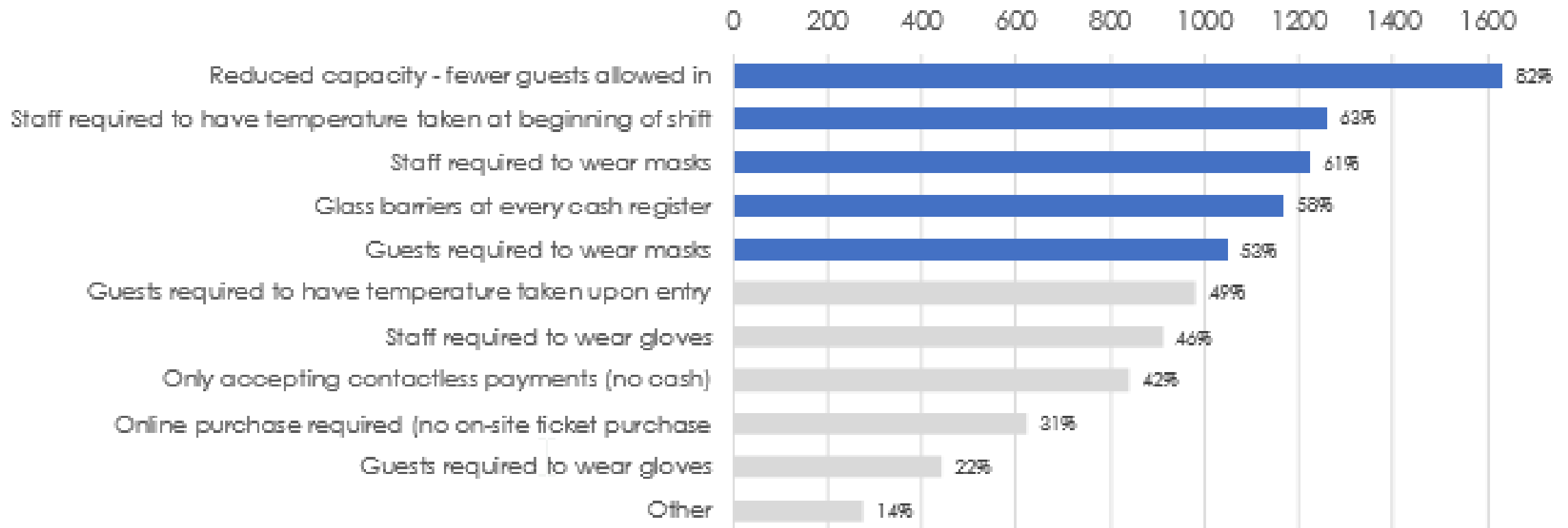
On a scale from 1-5, with 1 being "Least Likely" and 5 being "Most Likely," how likely are you to visit the following attraction types with 3 months of reopening?

# Primary reason for not visiting



If it is unlikely that you are to visit any type of attraction within 3 months of reopening, which is the primary reason?

# What modifications would you expect attractions to make?



What types of modifications would you expect attractions to make?  
(multi-select option)



# QUESTIONS / COMMUNITY FORUM



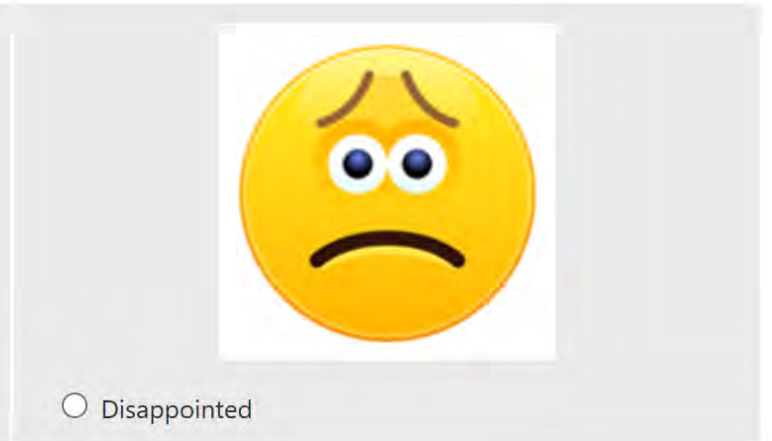
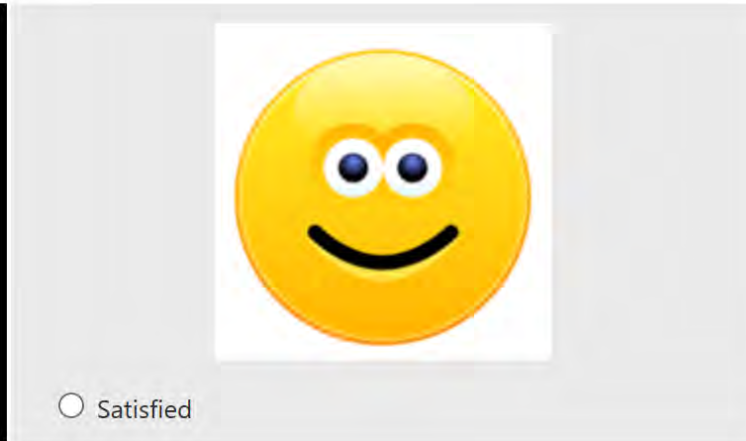
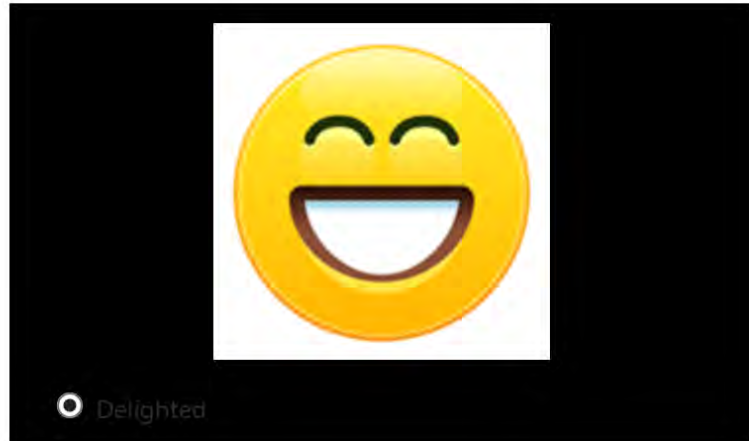


**SURVEY RESULTS / DASHBOARDS  
IN GALAXY CRM+**

# Portsmouth Historic Dockyard

Progress: 13% Done

Select the face that best describes your experience at Portsmouth Historic Dockyard



Please tell us why?

Really enjoyable day out. Great history and great guides

[← Previous](#)

[Next →](#)

# Portsmouth Historic Dockyard

Progress: 50% Done

What motivated you to visit us?

Enjoy a fun family day out

Experience something new

See for yourself as you have heard lots about it from friends and family

Enjoy a leisurely day out at your own pace

Learn how ships work

Share in the achievements of the Royal Navy

Learn about the people involved with and affected by the sites naval history

Next

[← Previous](#)

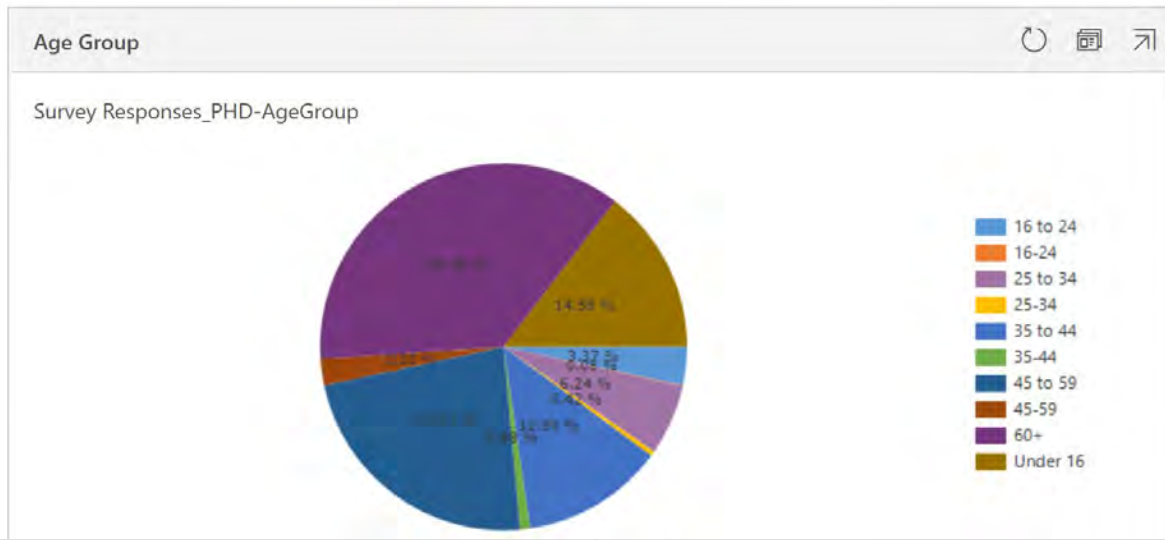
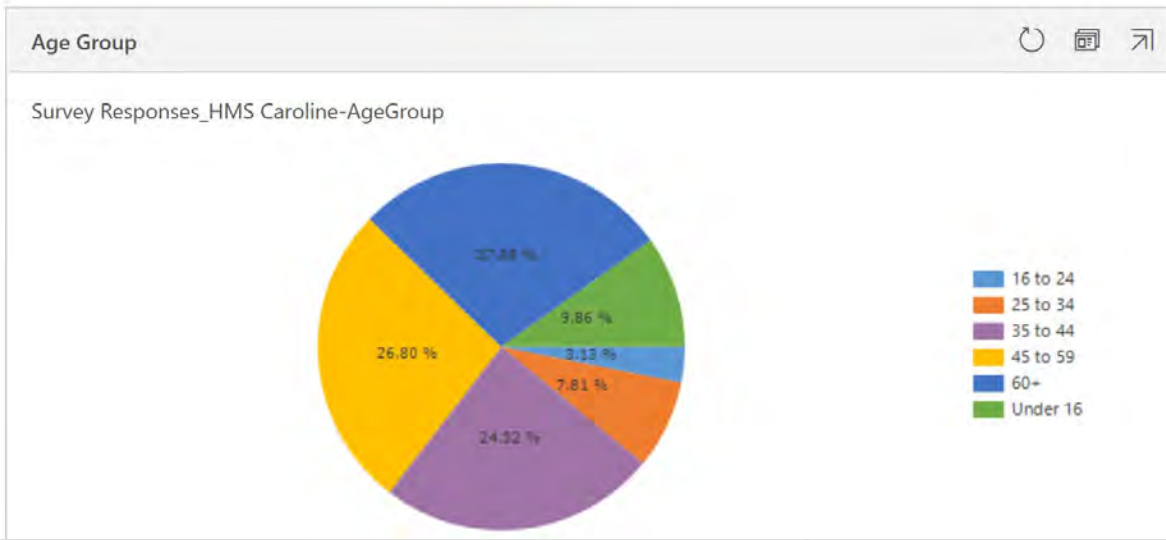
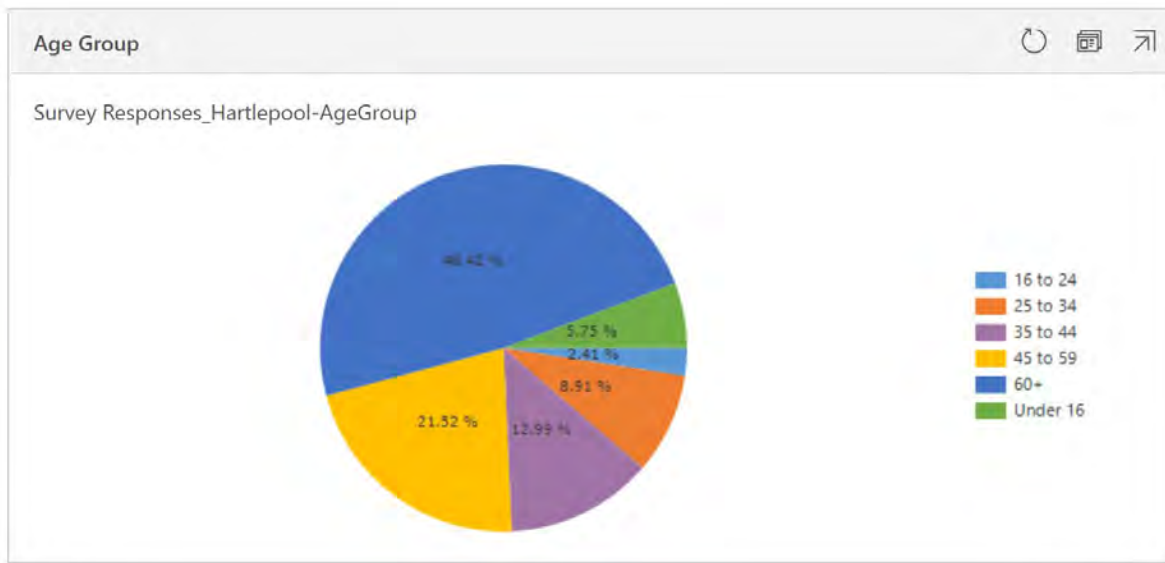
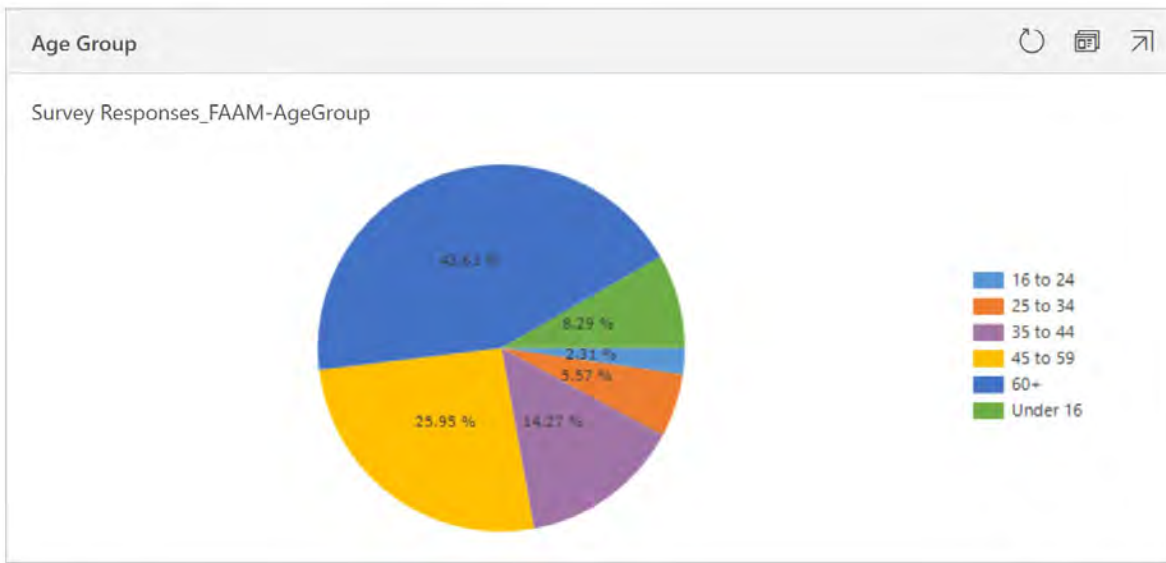
[Next →](#)

Active Survey Responses

Name	Survey Comp...	First Name	NMRN Survey Responses Code	Email	Ticket Id	Rating	DecideToVisit...	Timeframe	HearAboutUs...	Motivatic
Customer Satisfaction PHD 3 (2) - R00007562	11/04/2020 1...				56032010130...	Delighted		Over a month...	Radio	Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007561	11/04/2020 1...				56032010110...	Delighted		Over a month...	Recommend...	
Customer Satisfaction PHD 3 (2) - R00007560	11/04/2020 1...					Delighted		Today/Yester...		Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007559	11/04/2020 1...					Disappointed				
Customer Satisfaction PHD 3 (2) - R00007558	11/04/2020 1...				56022010150...	Delighted		Over a month...		Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007557	11/04/2020 1...				56032010150...	Delighted		Over a month...	Our Website	Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007556	11/04/2020 1...	ELLA				Satisfied		2-7 Days ago	Just Passing	Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007555	11/04/2020 1...					Disappointed		Today/Yester...		
Customer Satisfaction PHD 3 (2) - R00007554	11/04/2020 1...				56036010190...	Delighted		Today/Yester...	Roadside Pos...	Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007553	11/04/2020 1...	BRIDGET				Disappointed		Today/Yester...		
Customer Satisfaction PHD 3 (2) - R00007552	11/04/2020 1...	HOLLY				Disappointed		Today/Yester...	Just Passing	Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007551	11/04/2020 1...					Delighted		Today/Yester...	Recommend...	
Customer Satisfaction PHD 3 (2) - R00007550	11/04/2020 1...	GEORGE				Delighted		Today/Yester...		Enjoy a fun fa...
Customer Satisfaction PHD 3 (2) - R00007549	11/04/2020 1...	VICTORIA				Delighted		Today/Yester...	Radio	Enjoy a leisur...
Customer Satisfaction PHD 3 (2) - R00007548	11/04/2020 1...	PHIL				Delighted		Today/Yester...	Just Passing	Learn about t...
Customer Satisfaction PHD 3 (2) - R00007547	11/04/2020 1...				56032010140...	Delighted		2-7 Days ago		Experience so...
Customer Satisfaction PHD 3 (2) - R00007546	11/04/2020 1...	MILLY				Delighted		Today/Yester...	Our Website	



NMRN Survey Responses - Age Group



NMRN

### Catering Satisfaction



Catering  
Survey R

#### Survey Responses\_FAAM-Catering Satisfaction



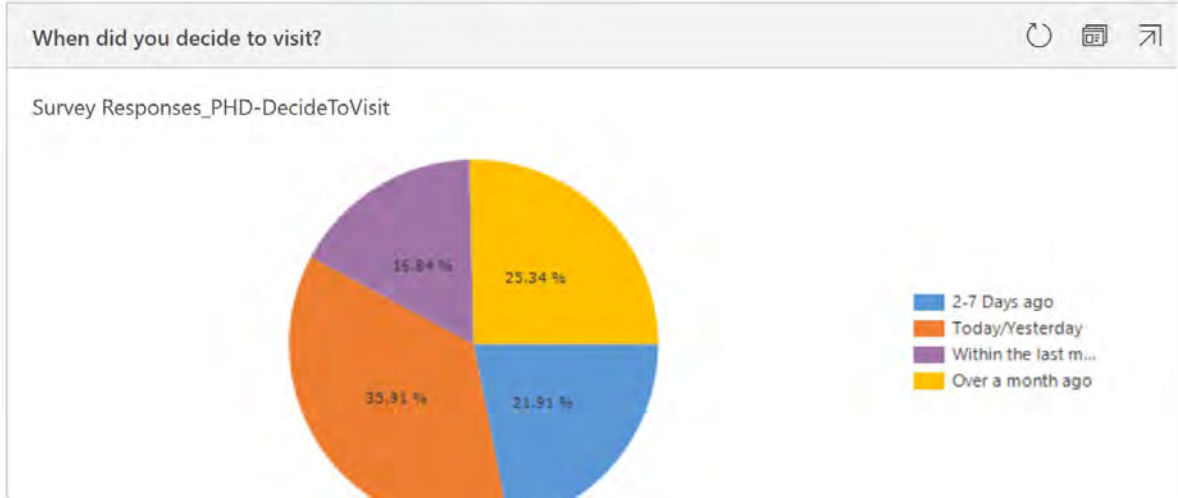
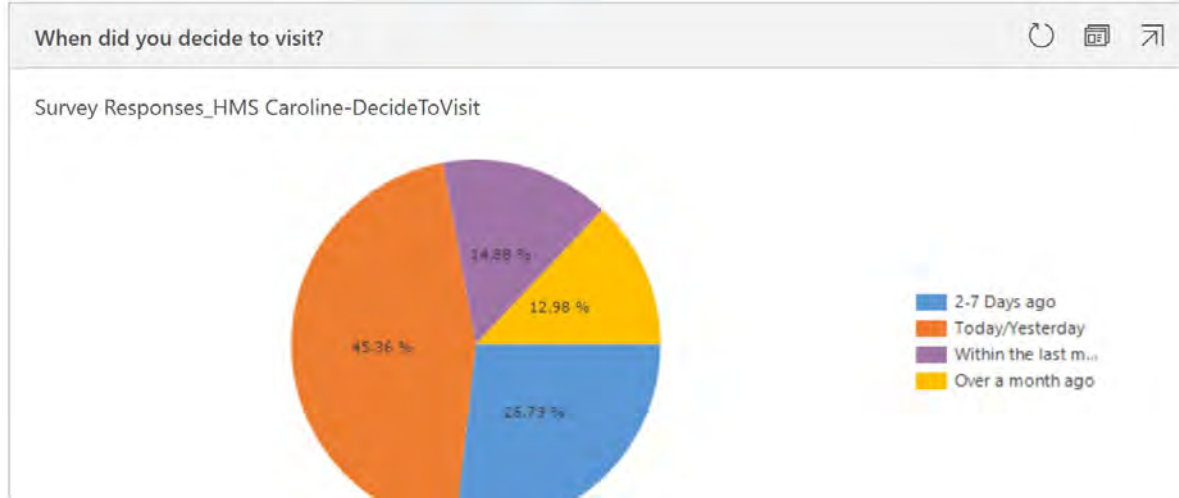
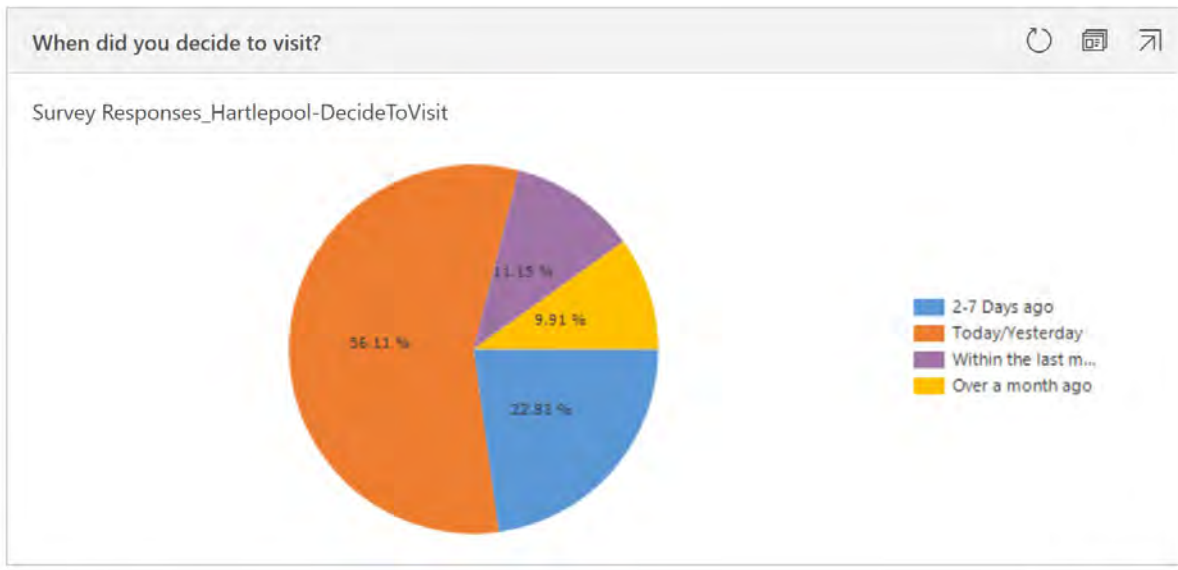
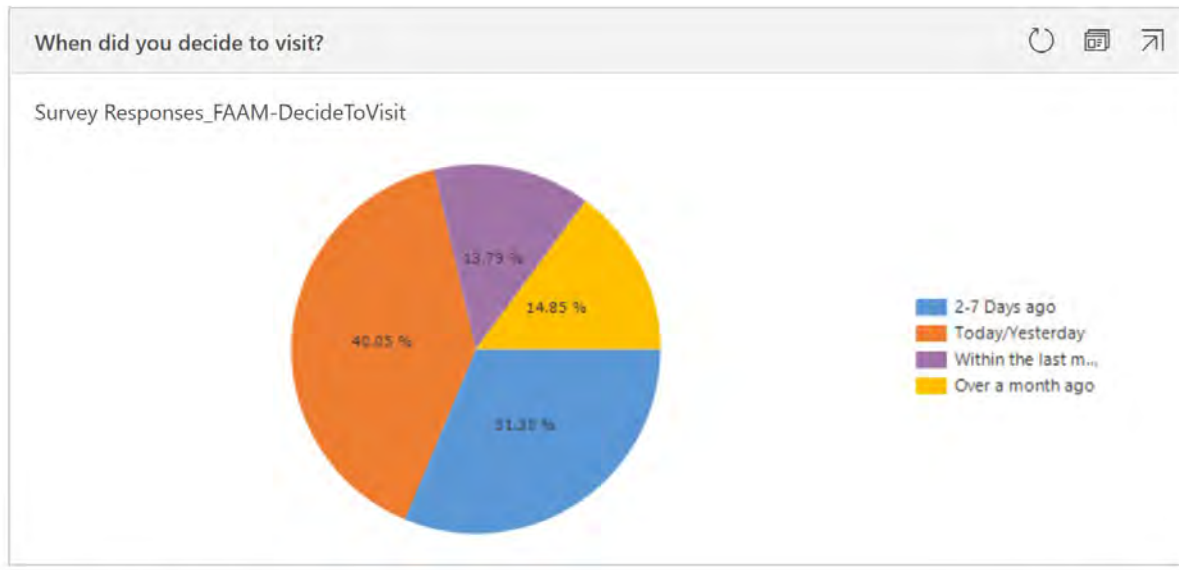
- Delighted
- Disappointed
- Not sure / don't...
- Satisfied

d  
on't...

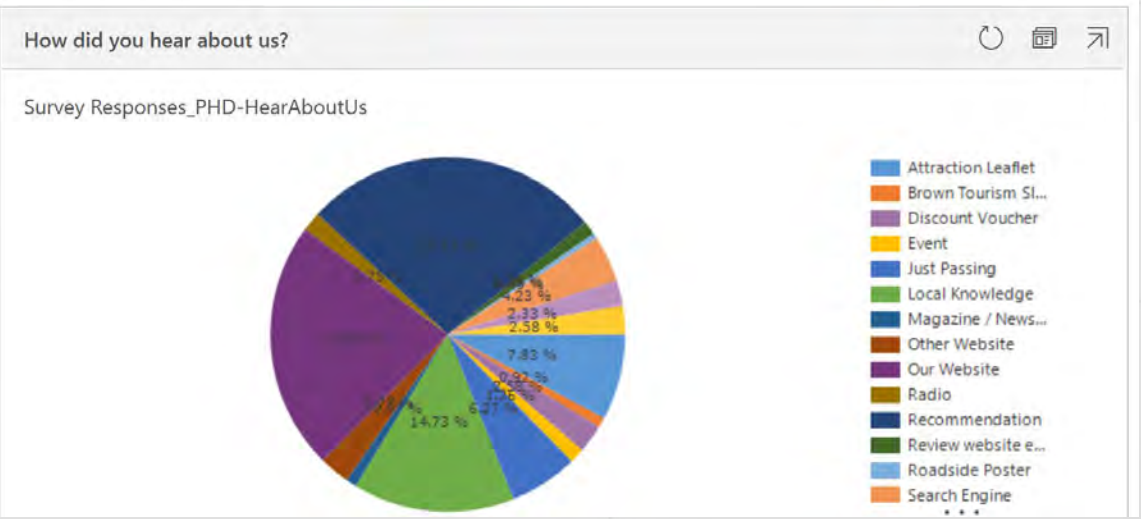
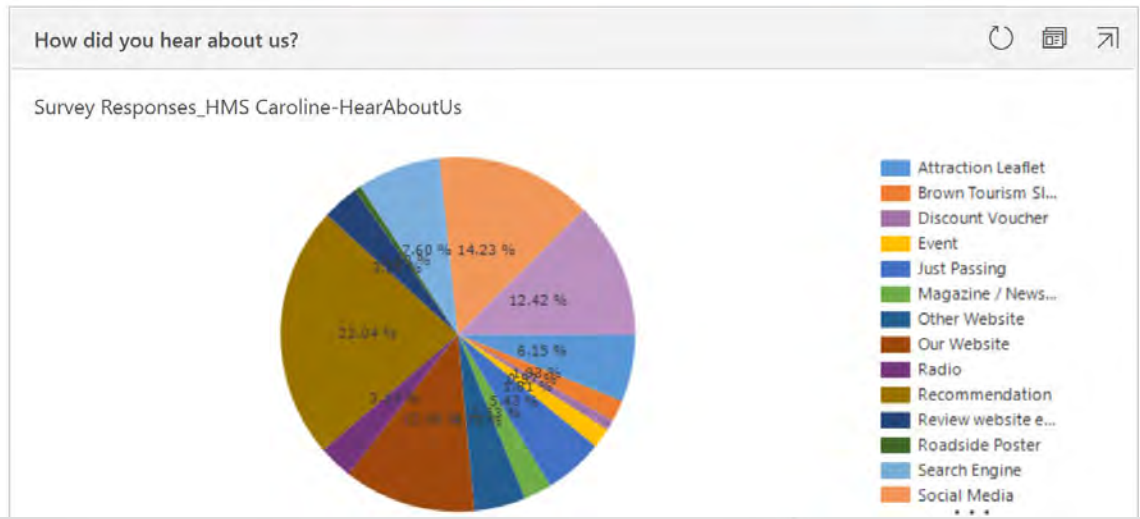
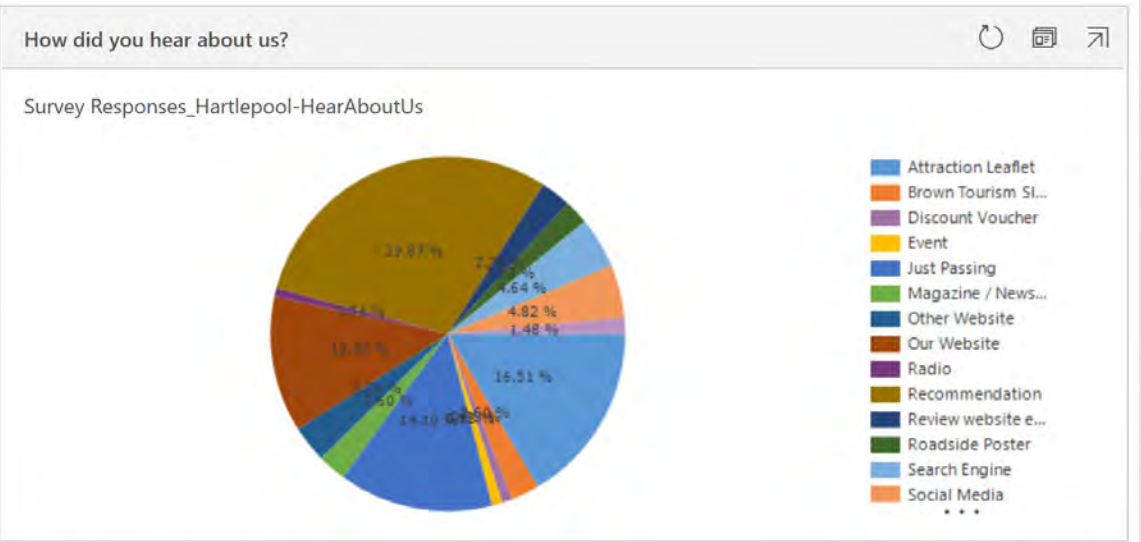
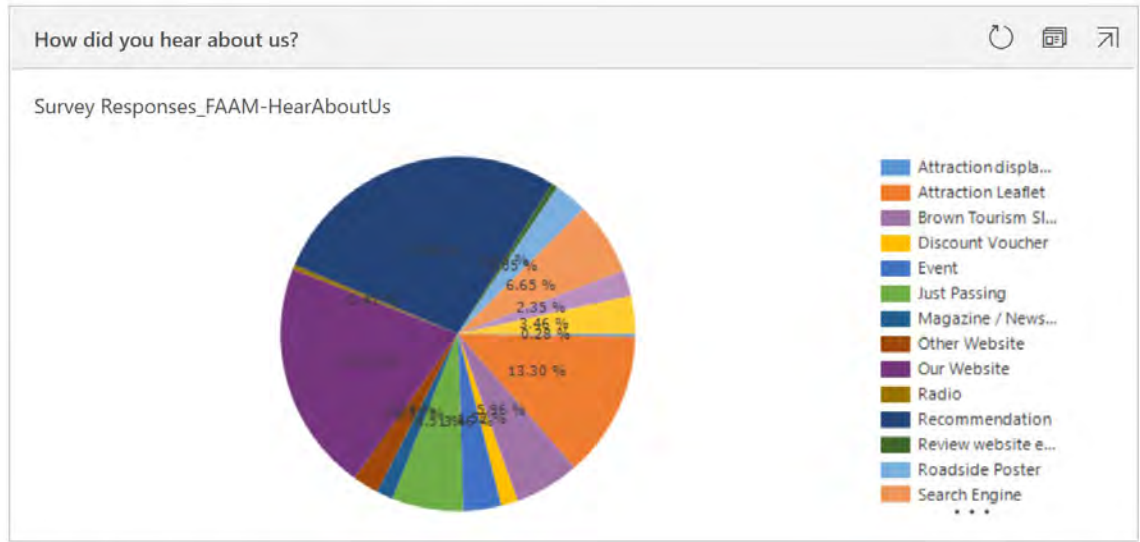
Catering  
Survey R

There are no NMRN Survey Responses in this view to create a Catering Satisfaction chart.

### NMRN Survey Responses - Decide to ...



NMRN Survey Responses - Hear about...





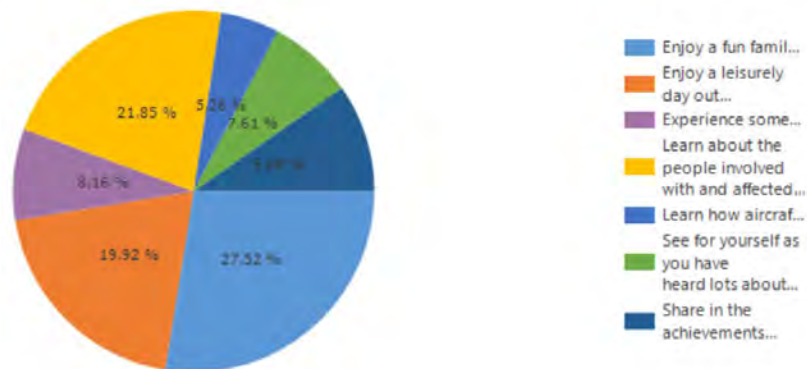


### NMRN Survey Responses - Motivation

Survey Response-Motivation Chart



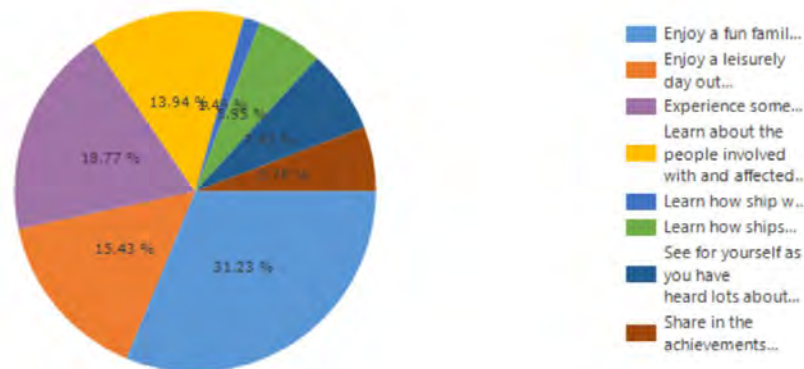
Survey Responses\_FAAM-Motivation



Survey Response-Motivation Chart



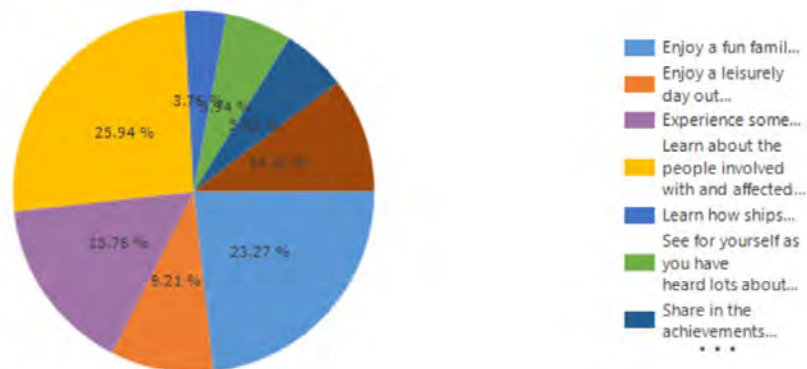
Survey Responses\_Hartlepool\_Motivation



Survey Response-Motivation Chart



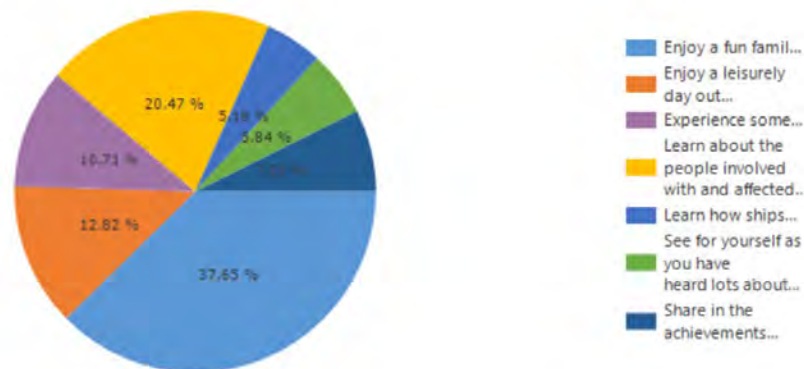
Survey Responses\_HMS Caroline-Motivation



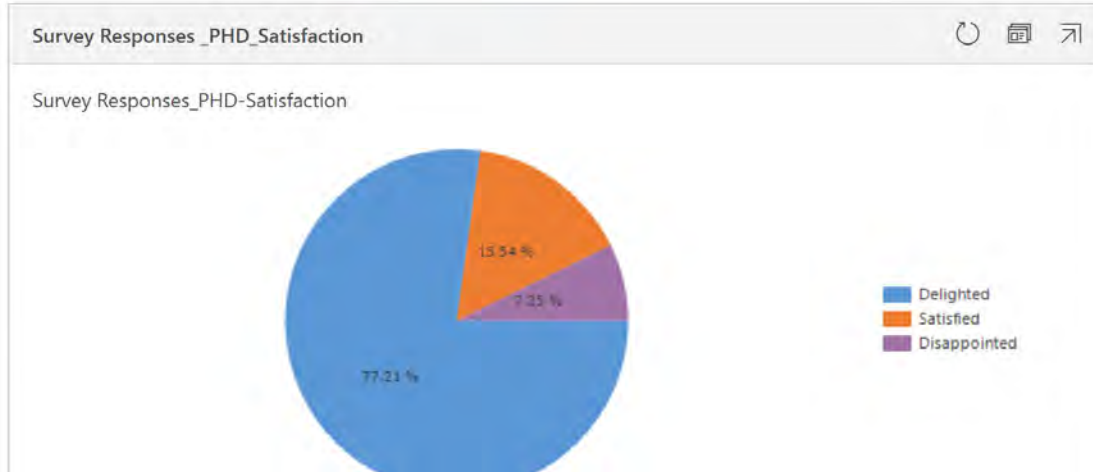
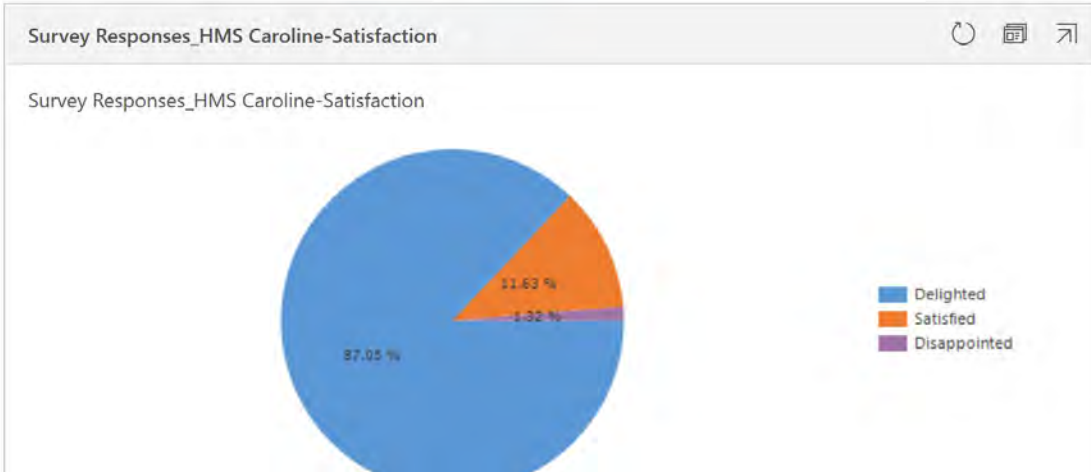
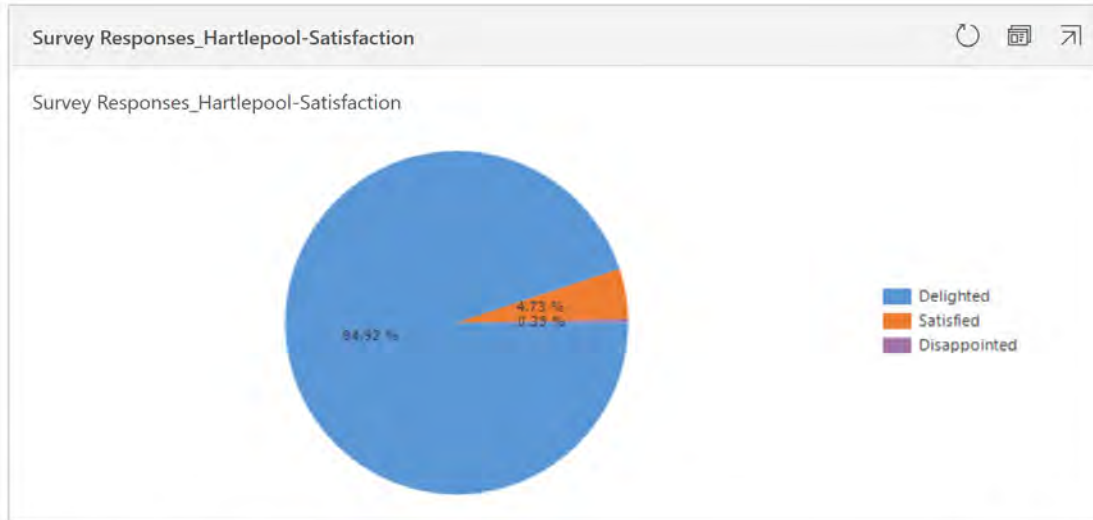
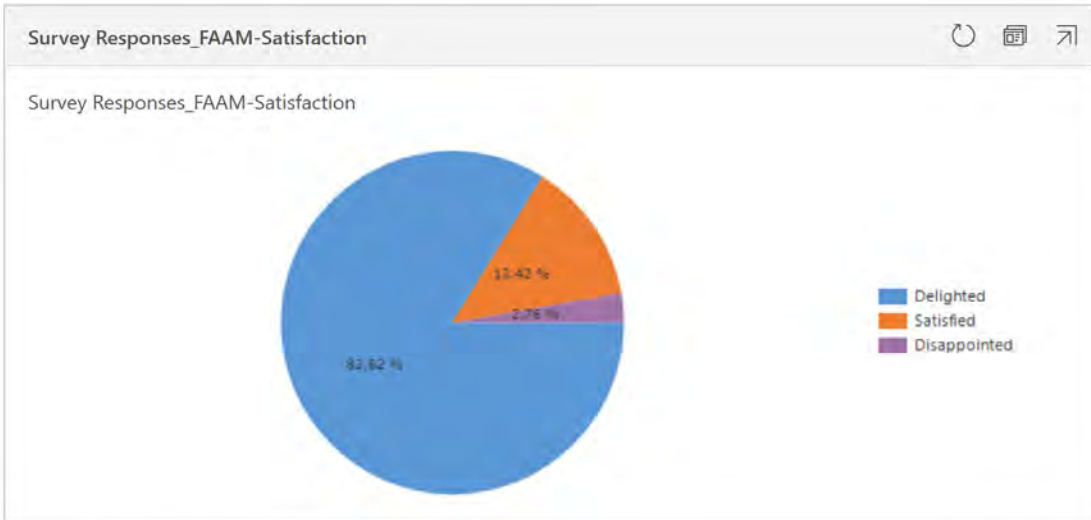
Survey Response-Motivation Chart



Survey Responses\_PHD-Motivation



### NMRN Survey Responses - Satisfaction



# CRM Community Forum

Tuesday May 19<sup>th</sup> 9:00 AM PDT / 12:00 Noon EDT

**CRM + PLUS**  

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Massimiliano Freddi



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**Robert Baldwin** shared a link. 22 hrs

Join us for an upcoming IAAPA Webinar 'COVID-19: Impact on Food and Beverage' on Thursday, May 14th.

As attractions face a "new normal," both large and small attractions and theme parks are preparing to successfully re-open their food and beverage locations. This panel will discuss topics including social distancing as it relates to seating and kitchen areas, points of sale, and serving lines.

This webinar is available to both members and nonmembers. Learn more about the webinar and register below. Hope to see you there!



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### About

Description

The IAAPA North America Exchange group gives IAAPA members a chance to share industry news and discuss challenges the in... **See More**

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Massimiliano Freddi **Add**

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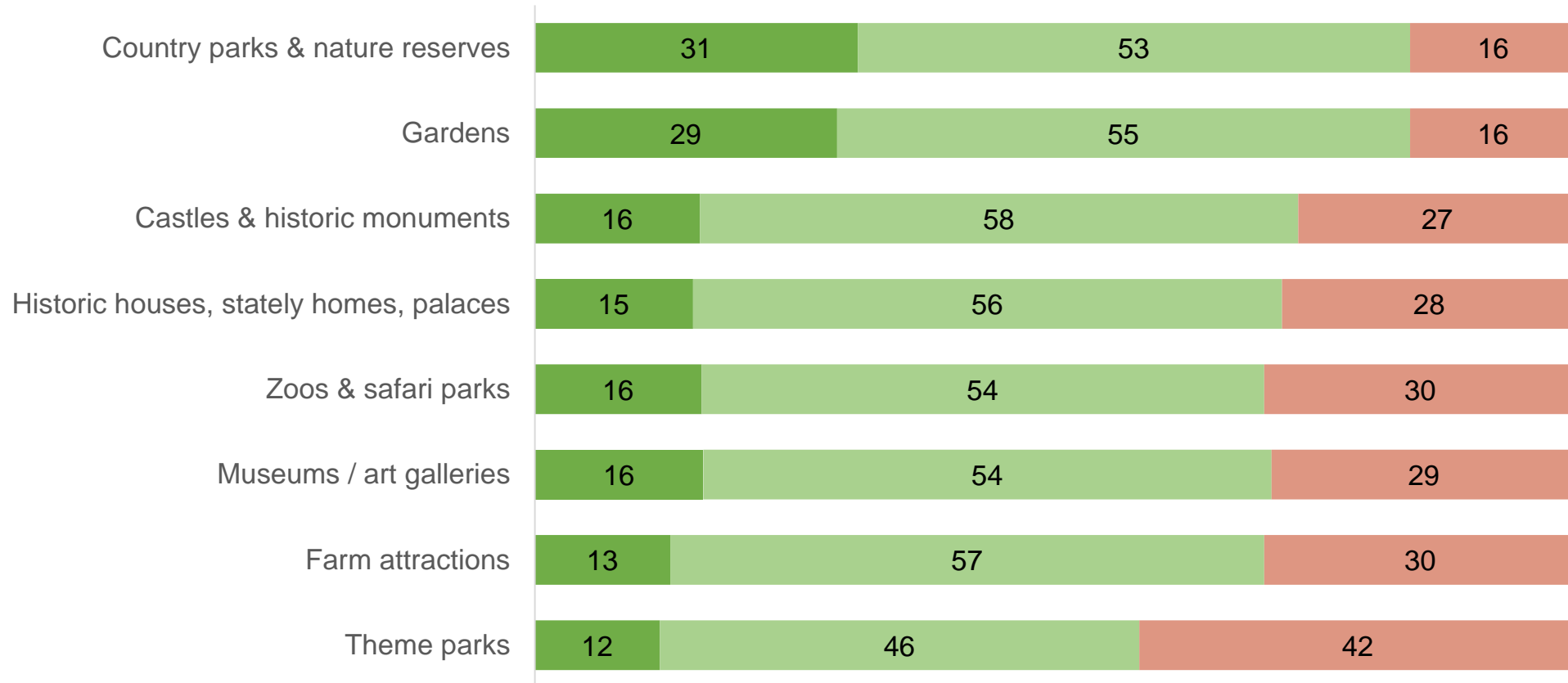
1

Market is highly cautious overall, but a quick return is more likely for gardens and country parks. But confidence is not as simple as outdoors versus indoors

**ALVA**

Attractions Recovery Tracker

**HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)**



■ As soon as opportunity arises   ■ Will wait and see what happens for short while   ■ Unlikely to want to visit for a long time

Q: Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open?

Bases: All who tend to visit this type of attraction: Museums/art galleries (570), Historic houses etc. (550), Castles & monuments (598), Zoos/safari parks (518), Gardens (586), Theme parks (425), Country parks & nature reserves (619), Farms (441)

# Caution is widespread, but there are some groups who are more likely to return as soon as the opportunity arises

**ALVA**

Attractions Recovery Tracker

**41% of the market will visit at least one attraction type  
'AS SOON AS THE OPPORTUNITY ARISES' after re-opening**



**52% among  
more frequent  
attraction visitors  
(5+ visits per year)**



**45% among  
those aged 55  
or over**



**49% among  
C2DEs**

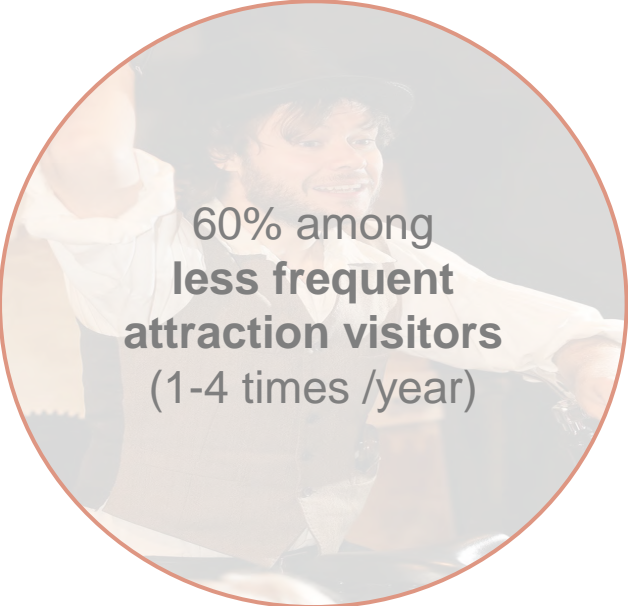


At the other end of the scale, there are some groups who currently feel that it will be a long time before they visit certain types of attraction


**ALVA**

Attractions Recovery Tracker

**55% of the market feel there is at least one attraction type they are 'UNLIKELY TO WANT TO VISIT FOR A LONG TIME' after re-opening**



**60% among  
less frequent  
attraction visitors  
(1-4 times /year)**



**60% among  
those aged  
under 35**



**62% among  
Londoners**

Q: Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open?

Bases: All respondents (668)

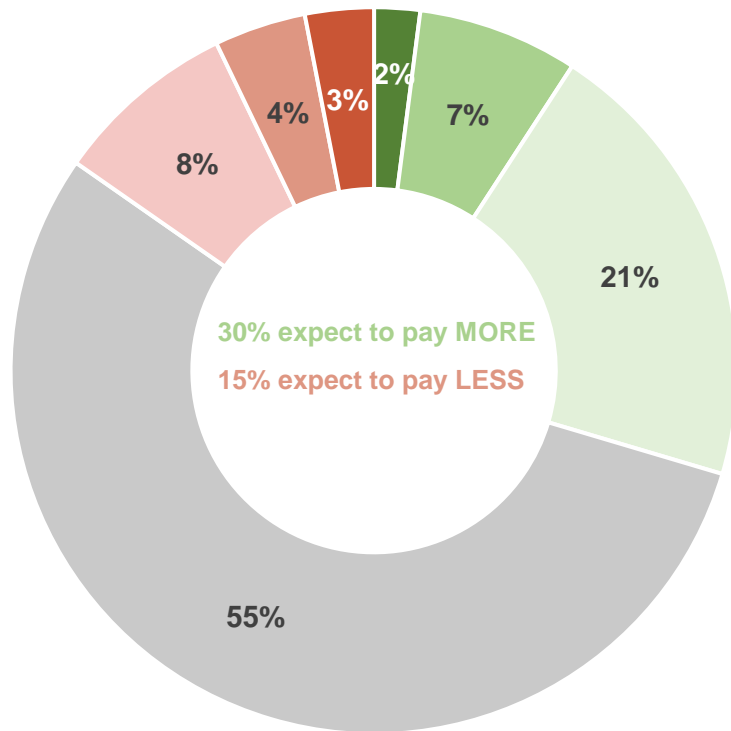
# In fact, there is evidence of some increased altruism in the market. This may be aspirational, but visitors not expecting blanket price discounting

**ALVA**

Attractions Recovery Tracker

When attractions re-open, what is your opinion of how much you would expect to pay for or donate to the attractions you visit compared to before the Coronavirus outbreak?

- 7 - MORE to the attractions I visit, as they need financial help right now
- 6
- 5
- 4 - ABOUT THE SAME as before
- 3
- 2
- 1 - LESS to the attractions I visit, as most visitors will be worse off financially



I am looking forward to going out and about to attractions when they open, think it's important to give them my custom following their re-opening

Can't wait to support these industries and national assets.

I do hope that they can re-open soon as the zoos especially rely on gate money to feed and look after the animals

I hope that they survive to open, I'm worried that many charities will be unable to cope and fold

## Clues on pricing or donor targets

1. 'Members' feeling particularly altruistic right now: 42% expect to pay / donate more
2. Altruism highest among young people: 39% of 16-34s, 25% of 35-54s and 25% of 55+ expect to pay / donate more
3. And also higher among families: 38% expect to pay / donate more
4. Zoo visitors most altruistic: 46% of frequent zoo visitors expect to pay / donate more

Q: When attractions re-open, what is your opinion of how much you would expect to pay for or donate to the attractions you visit compared to before the Coronavirus outbreak?

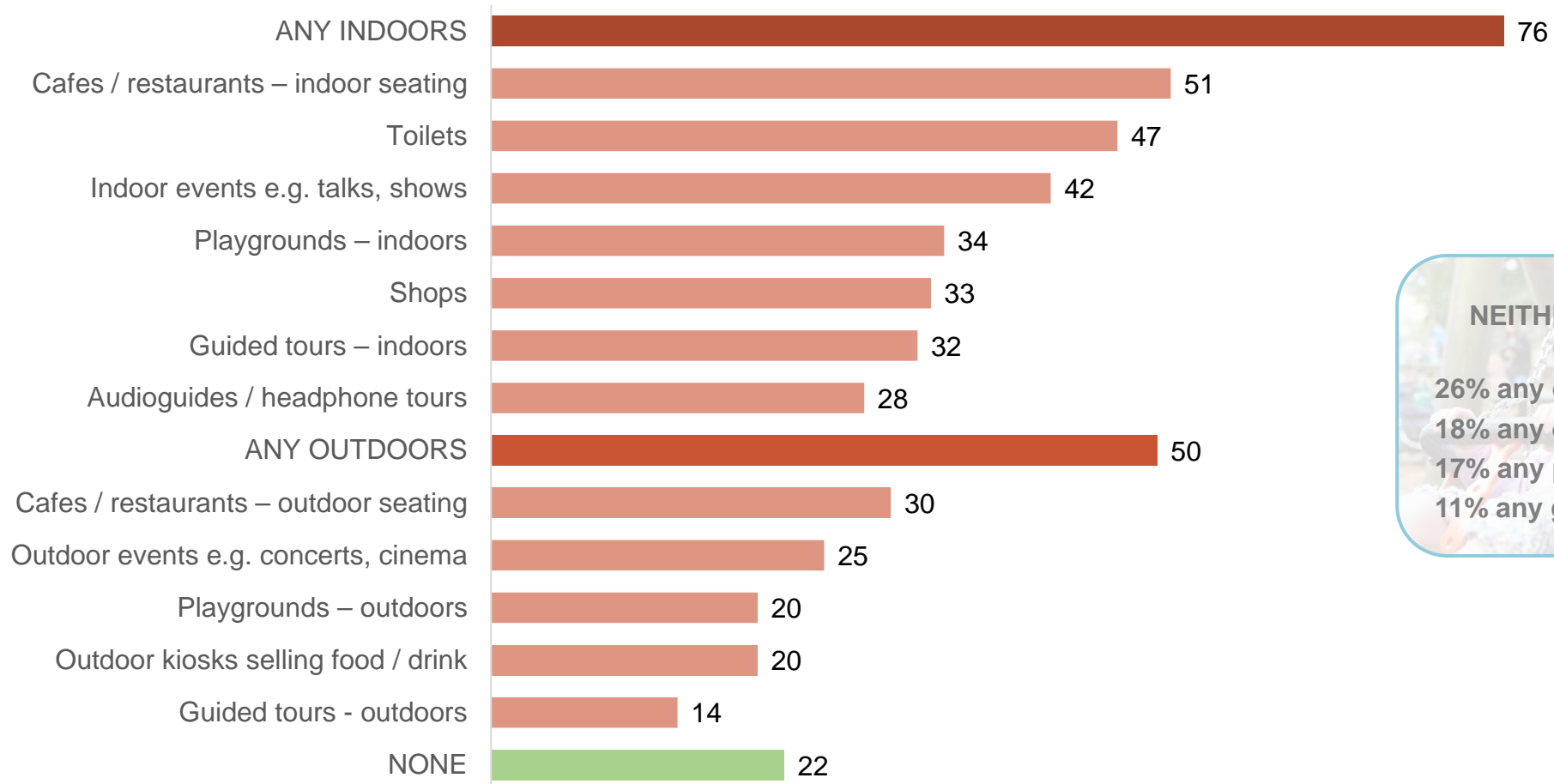
Base: All respondents (668)

# Widespread anxiety around using indoor facilities, particularly those where social distancing is more problematic. Less anxiety outdoors, but still notable

ALVA

Attractions Recovery Tracker

Will feel more anxious or uncomfortable about using than usual at attractions (%)



## NEITHER INDOORS NOR OUTDOORS

- 26% any café / restaurant
- 18% any events
- 17% any playground
- 11% any guided tours

Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open?

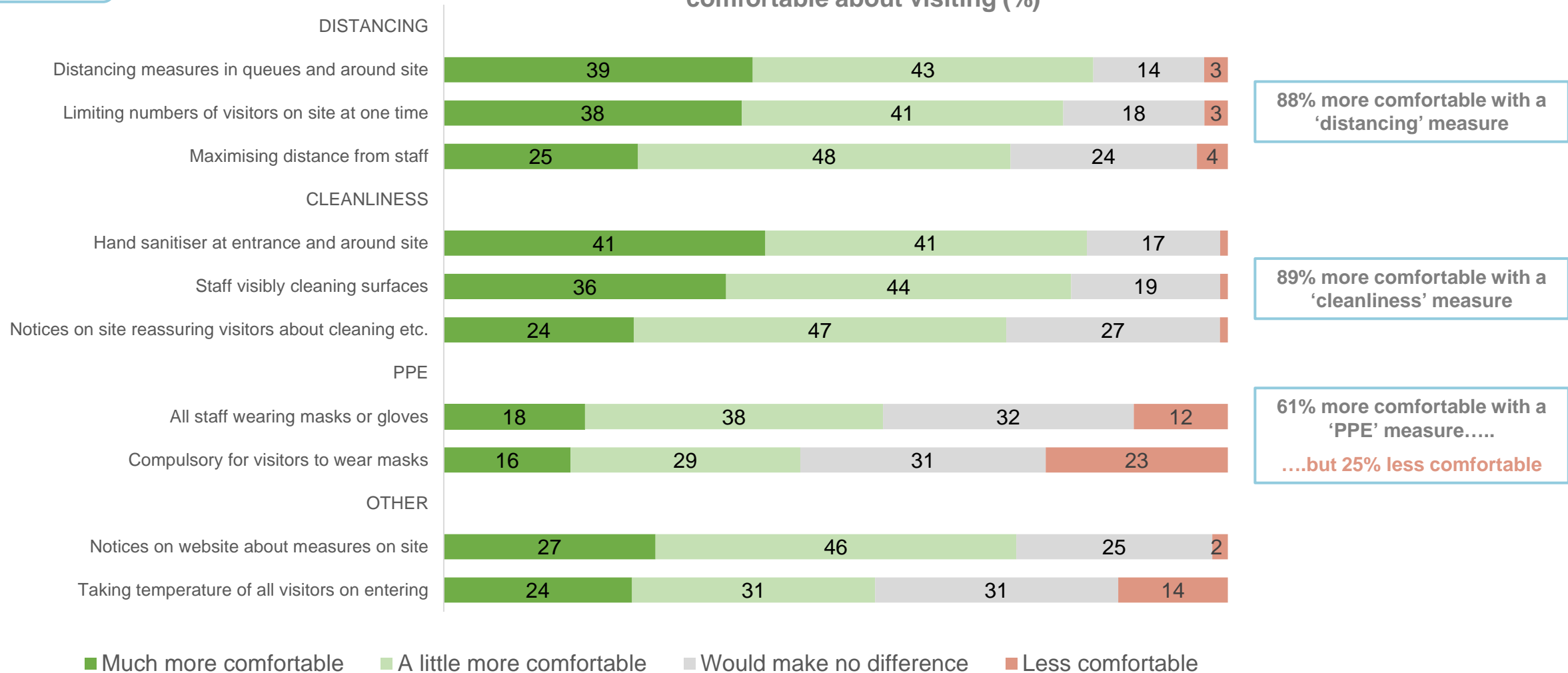
Base: All respondents (668)

Distancing and cleanliness measures strongly welcomed by the market, but attractions must be seen to be delivering and policing these effectively – notices alone are not enough. A quarter will feel less comfortable with introducing PPE, especially if compulsory for visitors

**ALVA**

Attractions Recovery Tracker

Which of these measures would make you feel more comfortable about visiting (%)



88% more comfortable with a 'distancing' measure

89% more comfortable with a 'cleanliness' measure

61% more comfortable with a 'PPE' measure....  
 ....but 25% less comfortable

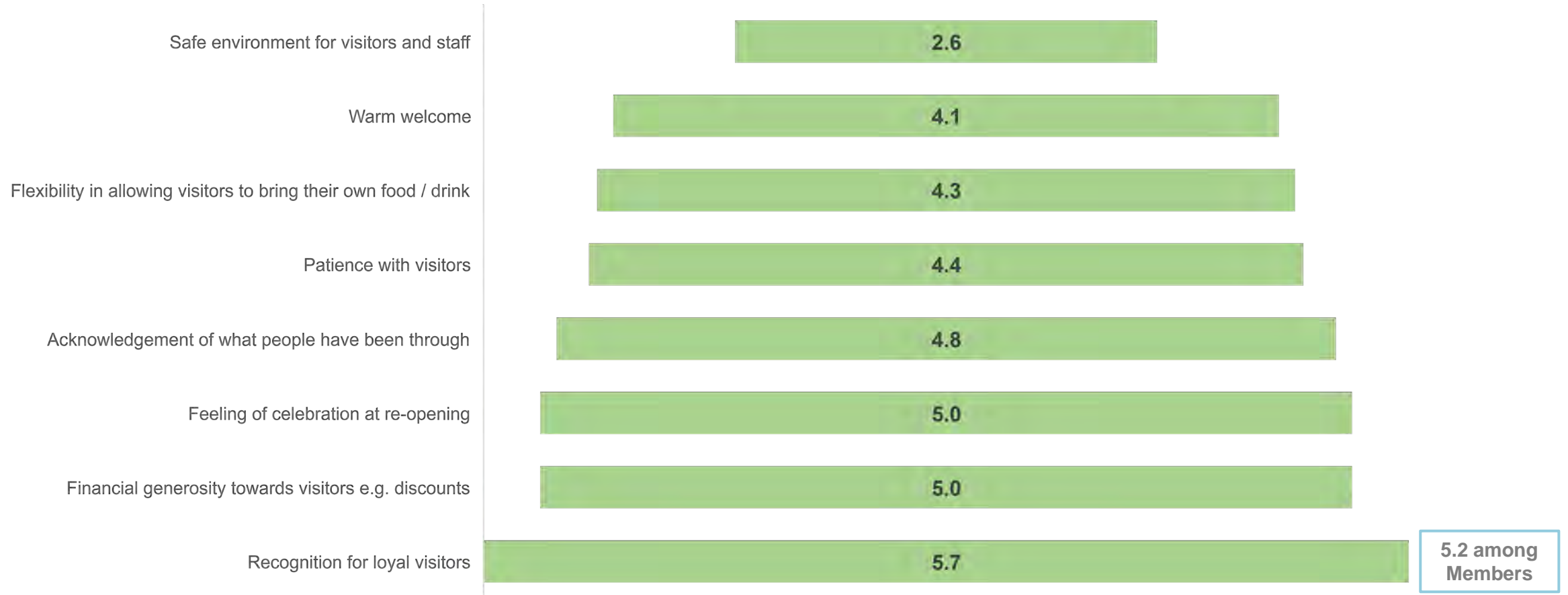
Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?

Bases: All respondents (668)



Above all, audiences feel that attractions should focus their efforts primarily upon providing a **safe environment** for visitors. A warm welcome, flexibility and patience are valuable bonuses, but visitors are not especially looking for financial benefits

*Average Importance Ranking* of characteristics would most like to see in attractions when they re-open (1=highest, 8=lowest)



Q: Which of these characteristics would you most like to see in visitor attractions when they re-open? Please rank these in order, starting with the characteristic that you would most like to see, ranked as number 1.

Base: All respondents (668)