‘LOOKING FORWARD’
VISIT GREENWICH CONSUMER SURVEY
SUMMARY OF RESPONSES

AS PART OF THE RECOVERY PLAN FOR THE VISITOR ECONOMY
OF THE ROYAL BOROUGH OF GREENWICH

May 2020
Visit Greenwich devised a short 10-minute survey using Surveymonkey. To ask consumers what they are looking forward to visiting when lockdown starts to ease. Questions were designed to complement other research and consumer insights, in particular BVA BDRC’s attitude tracker. Incentive of £200 Amazon giftcard Emailed to our opt-in database of leisure consumers. The survey was sent out in the week following the Government’s first easing of lockdown announcement on 10th May. 57k+ recipients 1,809 responses (3%) This report focusses on the responses from London / SE England The questionnaire can be viewed in the appendices. Also in the appendices are filtered reports for the 18-34 age group and households with children
# SURVEY RESPONSES

1,809 responses (sent to 57k) = 3% response rate

<table>
<thead>
<tr>
<th>Gender</th>
<th>Adults/ children in household</th>
<th>Country of residence</th>
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</thead>
<tbody>
<tr>
<td>64% Female</td>
<td>2 adults, 0 children</td>
<td>90% UK (1,450 responses)</td>
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<tr>
<td>35% Male</td>
<td></td>
<td>5% USA (78 responses)</td>
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<td>1% Other / Prefer not to say</td>
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**Age group**
- 42% 50 to 64 yrs
- 27% 35 to 49 yrs
- 22% 65yrs +

**Adults/ children in household**
- 2 adults, 0 children

**Of those residing in the UK**
- 30% London
- 26% South East
- 7% South West

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NB. As this evaluation is initially being used to inform our first stage recovery plan (targeting locals and London/SE), the analysis in this report focuses on the responses from **London & SE only** - 824 responses / 46% of the total.

<table>
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<th>Age group</th>
<th>Gender</th>
<th>Average adults/ children in household</th>
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</thead>
<tbody>
<tr>
<td>40% 50 to 64 yrs</td>
<td>65% Female</td>
<td>2 adults, 0 children</td>
</tr>
<tr>
<td>28% 35 to 49 yrs</td>
<td>34% Male</td>
<td>2 adults, 0 children</td>
</tr>
<tr>
<td>20% 65yrs +</td>
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<td>2 adults, 0 children</td>
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When lockdown starts to ease and people are able to start visiting places again, London/SE respondents state that they will be:

✓ Seeking out quiet places with fewer people (42%)
✓ Cautious and take their time (33%)

A further 19% state they will be keen to be with family and friends and happy to be out with them.
People were asked to agree or disagree with a list of statements relating to how they will feel after lockdown:

The statement that receives the top level of agreement is:
✓ I will continue to enjoy parks and gardens (53%)

The most negative is:
X I will attend large events

The weighted average of all responses shows the greatest level of agreement are for:
i) I will continue to enjoy parks and gardens
ii) I will seek out places with large spaces that are less busy
iii) I will visit London this year

It is also worth noting other large blue bars for ‘Agree’ which are for:
✓ I will be looking for great value offers (50%)
✓ Days out are important regardless of money (48%)
✓ I will prefer to stay local for trips out (42%)
When asked to prioritise what will be important to do first:

The top priority is very clear:
✓ A visit to family and friends at home (49%)

The weighted average of all responses (ranging from ‘nice to do’ to ‘top priority’) shows that the most important are:

i) A visit to family and friends at home
ii) A day out at a local attraction
iii) A meal out locally.

Looking at just the top two ‘top priority’ and ‘important’, the highest scores are:

i) A visit to family and friends at home
ii) A meal out locally
iii) Do something different, that I’ve been putting off.
In their own words, this is what people are most looking forward to.

London Family safe Sharing drink close normal long Seeing friends walk around Taking interesting Feeling experiences restaurant freedom choose Spending time family long walk want cafe able go able see friends pub Seeing mum meet seaside grandchildren son theatre Feeling free walk Catching friends family friends go meals Meeting family picnic eating different Meeting family friends coffee looking forward Meeting people Meeting friends Going pub hug home able visiting places Seeing park Looking forward Meeting people Meeting friends Going exploring Visiting catching Seeing family gym day shops friends family somewhere Seeing friends family safely enjoy places meal daughter Seeing family friends without freedom areas Meeting friends family will outside house Socialising spend live good things spending quality time relaxing nice Feeling safe able see local freely Spending time open together looking forward people Sitting loved ones granddaughter love parents Something Going back Travelling time family friends
People were asked to choose the top 5 things that would most inspire them to visit a place when lockdown restrictions ease.

The top 5 overall are:

i) Open green spaces (75%)

ii) Places that provide reassurance about social distancing measures and hygiene practices (68%)

iii) Places to meet up with friends / relatives (67%)

iv) Pubs, cafes, bars, restaurants (38%)

v) Museums, art galleries, visitor attractions (35%)

Followed closely by:

vi) Places off the beaten track (34%)
When asked if people had a preference for visiting somewhere inside or outside:

- 52% stated that they would prefer to be outdoors in the open
- 41% stated that it didn’t matter, they’d do both

With regard to other concerns about visiting places:

- ‘Crowds of people’ and ‘Hygiene/cleanliness’ were ranked as the main worries – 93% of responses
- Followed closely by Public Transport (90%)
- 62% of responses stated that they were not worried at all about less money to spend

This is put into context when asked about how the lockdown has impacted on the level of disposable income:

- 43% stated they were lucky to have saved money during lockdown and have more to spend
- 33% stated that they would prioritise trips and cut other spending so they would have about the same amount of spend
- But not to ignore that a quarter of respondents stated they were worse off
Preferred modes of transport and
How far people are willing to travel for a visit:

- 74% of people stated that they would be willing to travel for up to an hour or within 2 hours.
- Travel by car was the most popular (83%), followed by train (37%). River and Tube/DLR were virtually equal at around a quarter of responses each.
When asked about the likelihood of visiting Greenwich this year:

- 84% of people said they would be fairly or very likely to be visiting Greenwich this year

Of this 84%, they were asked how soon they would visit once official guidelines allow:

- 33% said they would visit within 3 months
- Responses were fairly even for within 1 month and within 6 months at 18% each

Using the Government’s 4th July re-opening date as an indicator, this would mean approximately 50% of people would visit before November.
We asked people if they would like to see staggered opening times and revised maximum numbers to help create more feeling of space and less crowding:

91% of people said yes

This question generated almost 400 voluntary comments, which shows how this is a hot topic for people.

Looking at the BVA/BDRC attitude tracker, the latest report shows that people are now more specific about their safety needs – they’re more familiar with phrases and measures and so are specifically stating in their responses that they want social distancing, sanitisers, timed tickets. Previously they would have just said they want to be reassured.
We also asked if people would like to see places offering special opening times for NHS/key workers as a thank you:

- 77% stated Yes

This was another question that generated a large number of voluntary comments on how people would or would not like to see key workers being given special access. A common suggestion was to suggest offers/discounts instead.

- No, but a discount or other recognition would be appropriate.
- Not really, because apart from NHS and Blue light people at what point do you draw the line.
- My husband is a key worker. He’s a postman and is worn out every day. Love to been with him and take him out somewhere for a couple of hours for chilling and relaxing. Doesn’t cost too much.
- Possibly – and discounts on entry fees – as long as the gesture is meaningful in the sense that their sacrifices are not undone by processes that will lead to overcrowding or inability to observe strict hygiene.
- A difficult one as for it to be just a thank you it would be a limited time. For a general appreciation of the NHS then discounts on prices for things including in shops.
- As a key worker myself, I would probably avoid these times as everyone has made sacrifices over this time and I feel it would pedestal us for the wrong reasons in some people’s eyes. We’re all in this together.
Households with children filter: London & SE

(179 responses)

UK region
- 54% London
- 46% South East

There is little variation to the main London/SE report, but to view a filtered report please see the online report saved here on Surveymonkey - download here

Variations:
- A fewer proportion of people say they have saved money and have more disposable income - 30% (43% in main report). The majority (38%) are prepared to cut spending in other areas to prioritise trips (versus 33% in main report).
- More people with children stated that they would prefer to be outdoors in the open: 57% v 52%. Fewer people stated that it didn’t matter, they’d do both (38% v 41%).
- Car continues to the most popular choice of transport (87% v 83%), with a higher proportion (35% v 29%) of people included cycling as a preferred mode of transport.
Age group filter: 50–64 yrs, London & SE (340 responses)

UK region
- 50% London
- 50% South East

There is little variation to the main London/SE report, but to view a filtered report please see the online report saved here on Surveymonkey – download here
Age group filter: 18–34 yrs, London & SE (94 responses)

UK region
- 71% London
- 29% South East

There is little variation to the main London/SE report, but to view a filtered report please see the online report saved here on SurveyMonkey – download here
Visit Greenwich 'Looking Forward' Consumer Survey

Hello and best wishes from us at Visit Greenwich.

We are looking forward to welcoming you to Greenwich when the time is right. Our attractions, markets, restaurants and unique outdoor experiences are getting ready to open safely with wonderful things to see and do.

We would like some help from you in planning for our doors re-opening. What are you looking forward to doing? What is in your list of ‘must-do’s when lockdown begins to relax?

We have put together a short questionnaire which should take around 10 minutes to complete. We would love to hear from you.

There is a prize draw to enter with a chance to win a £200 Amazon gift card, just tick the box at the end and include your up-to-date details.

Thank you for participating in our survey. We know it’s a tough time. Your feedback is important.

Visit Greenwich ‘Looking Forward’ Consumer Survey

This first set of questions relate to planning your leisure time, days out and holidays.

* 1. Given what you know today about the gradual ending of lockdown, which of the sentences below best describes how you will act when you are able to start visiting places?
   - I’ll be cautious and take my time
   - I’ll be seeking out quiet places with fewer people
   - I’ll be keen to be with family and friends and happy to be out with them
   - I’ll be rushing out the door and visiting lots of places as quickly as possible
   - Other (please specify)

* 2. Where do you think you will visit first?
   (Click on the circle that best shows the level of importance to you)
   - Pop to the pub
   - A meal out locally
   - A visit to family and friends at home
   - A day out at a local attraction
   - A day out that’s one to two hours away
   - Do something different, that I’ve been putting off
   - A trip to the cinema or theatre
   - A session at a spa, gym, salon
   - A visit to a shopping mall
   - Somewhere I can play some sport
   - Other (please specify)

* 3. Would you have a preference for visiting somewhere that is inside or outside?
   - I’d prefer to be outdoors in the open
   - I can’t wait to be back inside enjoying things like museums and restaurants
   - I’d do both, it doesn’t matter

   Any comments? (please type in the space)

* 4. How far will you be willing to travel for a day out?
   - Within half an hour’s travel time
   - Up to an hour
   - Within 2 hours
   - Over 2 hours
   - It doesn’t matter

Any comments? (please type in the space)
* 5. Which modes of transport will you be happy to use? (Please tick all that apply)
   - [ ] Car
   - [ ] London Underground / Tube / DLR
   - [ ] Train
   - [ ] Bus
   - [ ] Bicycle
   - [ ] Other (please specify) 

* 6. What would most inspire you to visit a place when lockdown restrictions ease? (Please tick your top 5)
   - [ ] Popular wish-list destinations
   - [ ] Places to meet up with friends / relatives
   - [ ] Places that provide reassurance about social distancing measures and hygiene practices
   - [ ] Open, green spaces
   - [ ] Museums, art galleries, visitor attractions
   - [ ] Pubs, cafes, bars, restaurants
   - [ ] A specific event
   - [ ] Places of the beaten track
   - [ ] Shops and markets
   - [ ] Unique experiences, adventure
   - [ ] Family friendly – things for kids
   - [ ] Special promotions / offers

7. In your own words, please give one sentence about what you are most looking forward to doing.

* 8. What would you worry about more than before when visiting places?
   - [ ] Crowds of people
   - [ ] Hygiene / cleanliness
   - [ ] Less money to spend
   - [ ] Public transport

* 9. Compared to before Covid-19, has the amount of disposable income you have to spend on leisure and days out changed?
   - [ ] I prefer to cut out other spending in favour of trips out so it will be about the same
   - [ ] I’m today that I have more money during lockdown and have more to spend

* 10. To what extent would you agree or disagree with these statements relating to how you will feel after lockdown?

   - [ ] I will want to do something enjoyable
   - [ ] I will see places with large groups that are less busy
   - [ ] I will want to take a holiday in the UK this year
   - [ ] I will want to go out to bars and restaurants
   - [ ] I will want to go out to cafes and restaurants
   - [ ] I will be happy to use public transport
   - [ ] Days out are important regardless of money
   - [ ] I will still wear face masks
   - [ ] I will still attend large events
   - [ ] I will still be looking for great value offers
   - [ ] I will still prefer to stay local for trips out
   - [ ] I will still want to take an overseas holiday
   - [ ] I will visit London this year

* 11. How likely is it that you will visit Greenwich this year?
   - [ ] Very Likely
   - [ ] Fairly Likely
   - [ ] Not Likely
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<thead>
<tr>
<th>Question</th>
<th>Options</th>
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<tbody>
<tr>
<td>* 12. If very or fairly likely how soon do you anticipate visiting (once official guidelines allow)?</td>
<td>Yes, No</td>
</tr>
<tr>
<td>* 13. Would you like to see staggered opening times and revised maximum numbers to help create more feeling of space and less crowding?</td>
<td>Yes, No</td>
</tr>
<tr>
<td>* 14. Would you like to see places offering special opening times for NHS/key workers as a thank you?</td>
<td>Yes, No</td>
</tr>
<tr>
<td>* 15. First name</td>
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<td>* 16. Last name</td>
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<tr>
<td>* 17. What is your gender?</td>
<td>Female, Male</td>
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<tr>
<td>* 18. In which country do you live?</td>
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<tr>
<td>* 19. If UK, in which region do you live?</td>
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<tr>
<td>* 20. Age group</td>
<td>17 or under, 18-24, 25-34, 35-44, 45-54, 55+</td>
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<tr>
<td>* 21. How many people currently live in your household, including yourself?</td>
<td>No of adults (including you), No of children</td>
</tr>
<tr>
<td>* 22. I'm interested in: (Tick box all that apply)</td>
<td>Days Out Ideas, History, Outdoors, Health and Wellbeing, Eating and Drinking, Shopping, Music, cinema and theatre, Things for kids, Events and exhibitions, Talks and walks</td>
</tr>
<tr>
<td>* 23. If you would like to be entered into our free prize draw to win a £200 Amazon Gift Card, please leave your email address below.</td>
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