MARKET INSIGHTS BRIEFING

Domestic market context for visitor attractions

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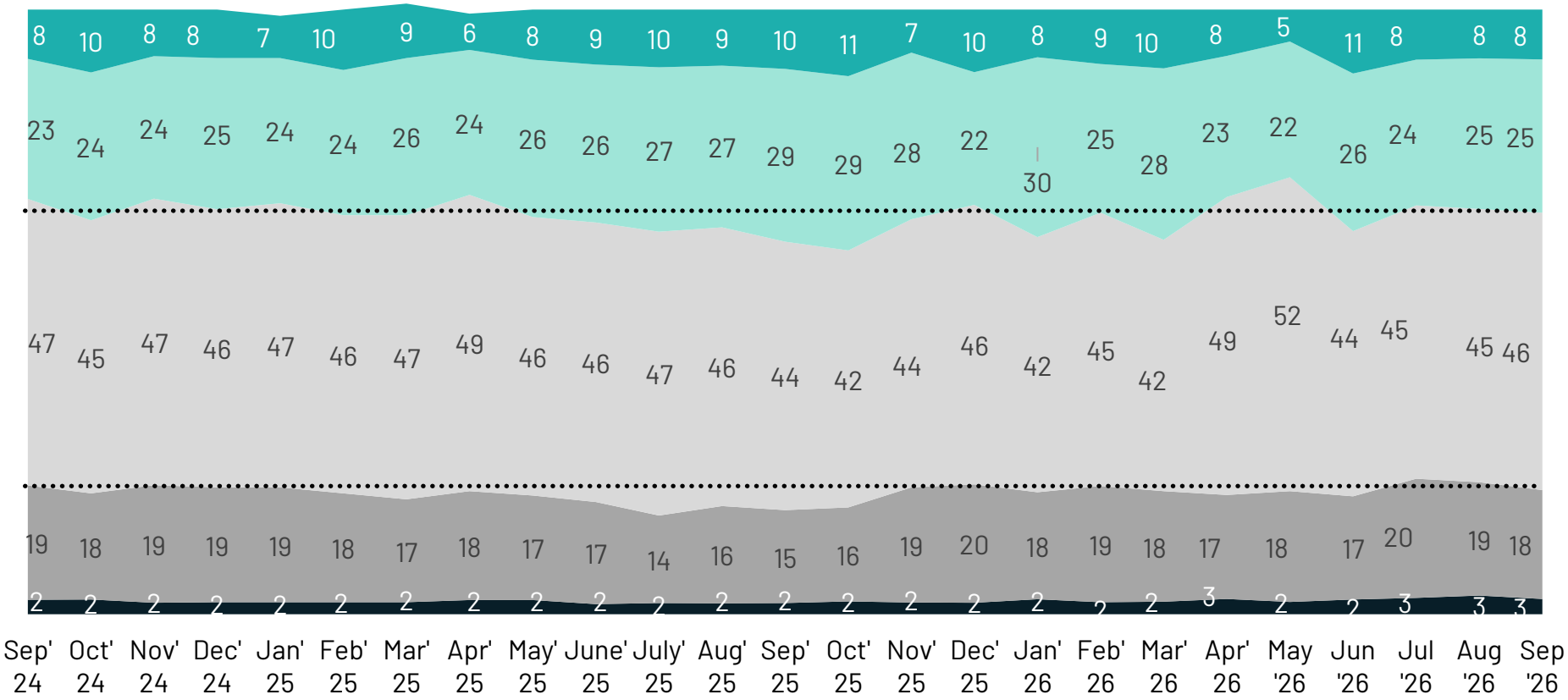
Associate Director

DESPITE STABLE SENTIMENT, COST-OF-LIVING PRESSURES CONTINUE TO SHAPE CONSUMER BEHAVIOUR

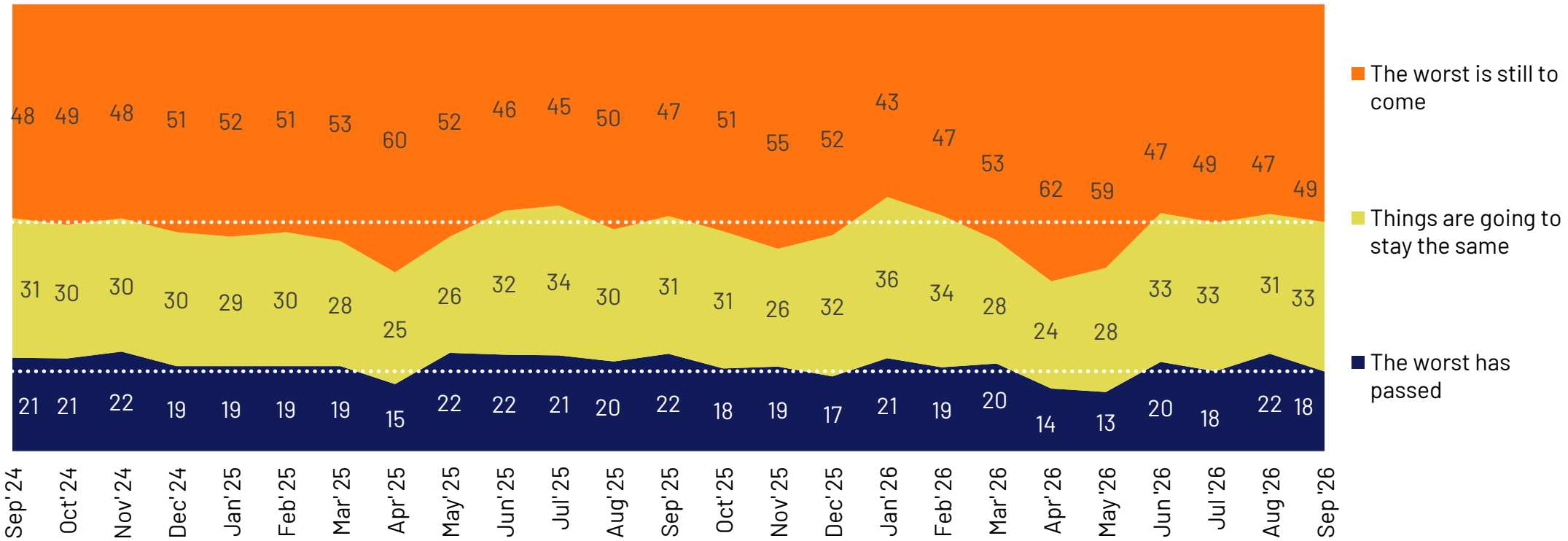
Caution continues to dominate financial mindset despite some stability in the last year



- I'm one of the lucky ones – better off than before the crisis
- I'm alright – the 'cost of living crisis' has not really affected me and confident it won't
- I'm cautious - things are OK but I feel I have to be very careful
- I've been hit hard – no option but to cut back on spending
- Although I've been hit hard and should cut back, I'll spend today and let tomorrow look after itself

IPSOS Travel and Tourism Barometer Q17: There has been a lot of talk about how the 'cost of living crisis has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. September 2026 = 1,755.

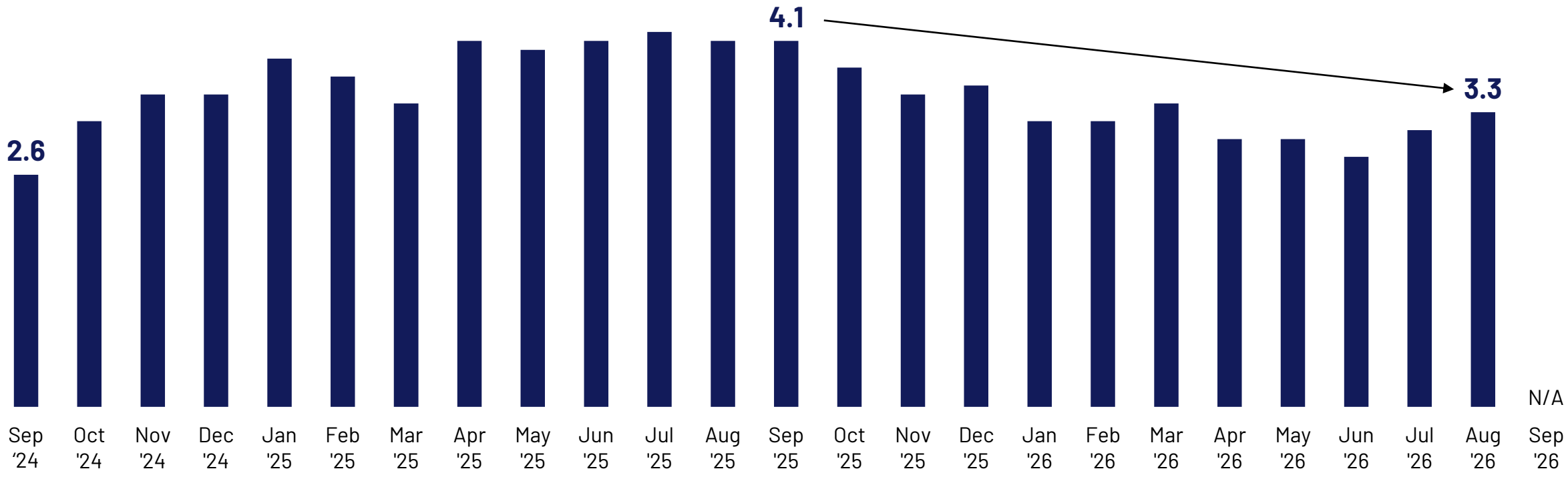
Cost-of-living perceptions have recovered following uncertainty fuelled by the Iran war



IPSOS Travel and Tourism Barometer 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 respondents. September 2026 = 1,755.

CPI inflation has dropped since last year

Consumer Price Index – 12-month rate (%)



Monthly CPIH annual rate data from the Office of National Statistics (ONS) Consumer Price inflation time series

Slight recovery in attraction visiting in the last year amongst domestic consumers

Domestic consumers who were ACTIVE in the market in the last year as of…

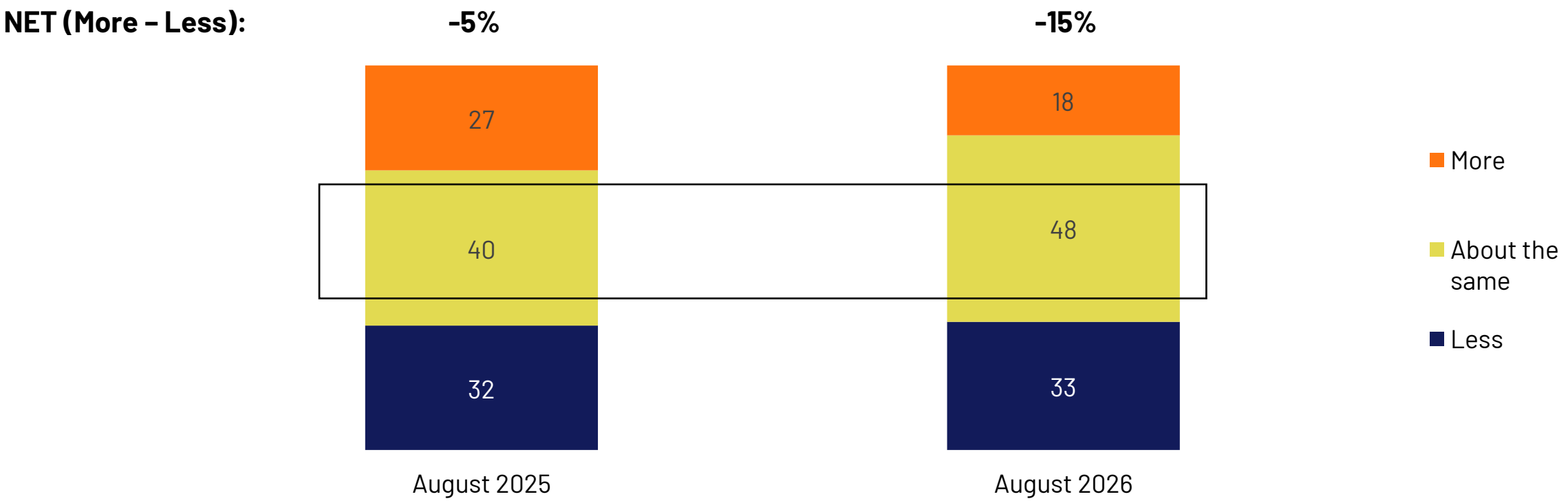
September 2025

September 2026

IPSOS TRAVEL AND TOURISM BAROMETER. VAC2. Which types of visitor attraction, if any, have you visited in the last year?
Base: All respondents August 2026 (1,750)

Active visitors remain engaged, albeit a shift towards maintaining visit frequency

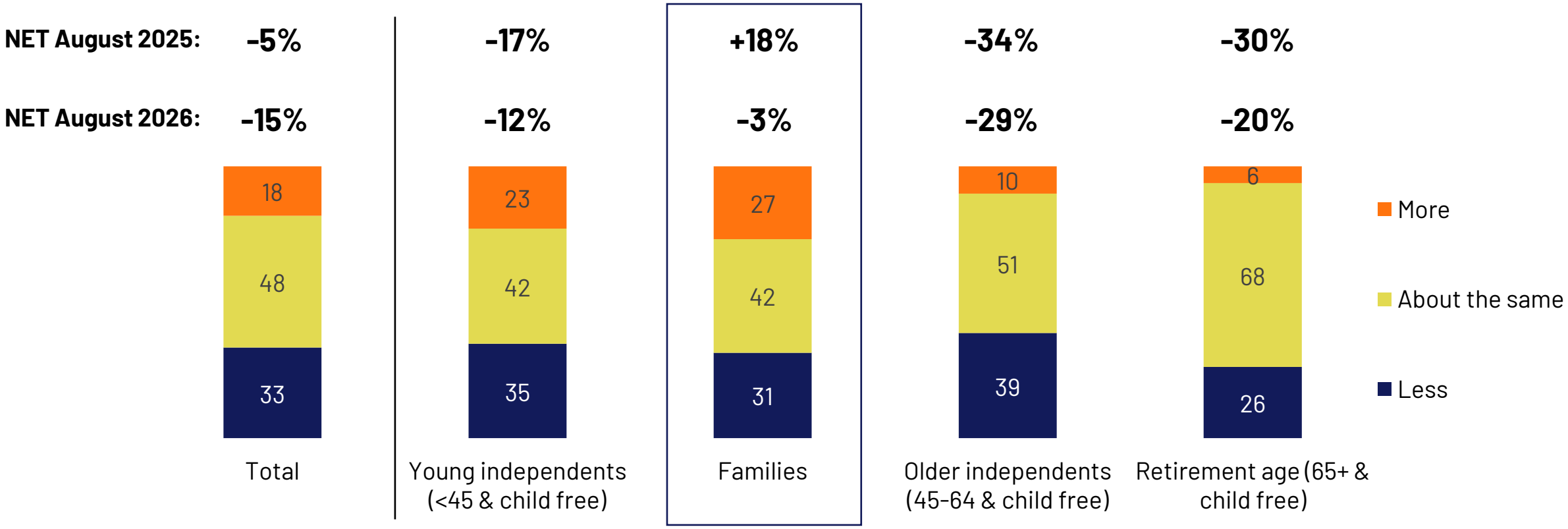
Change in attraction visits amongst ACTIVE attraction visitors (%)



IPSOS TRAVEL AND TOURISM BAROMETER. VAC5. Generally speaking, are you visiting UK attractions more, less or about the same as a year ago?
Base: August 2026 Visited attractions in last year (1,295)

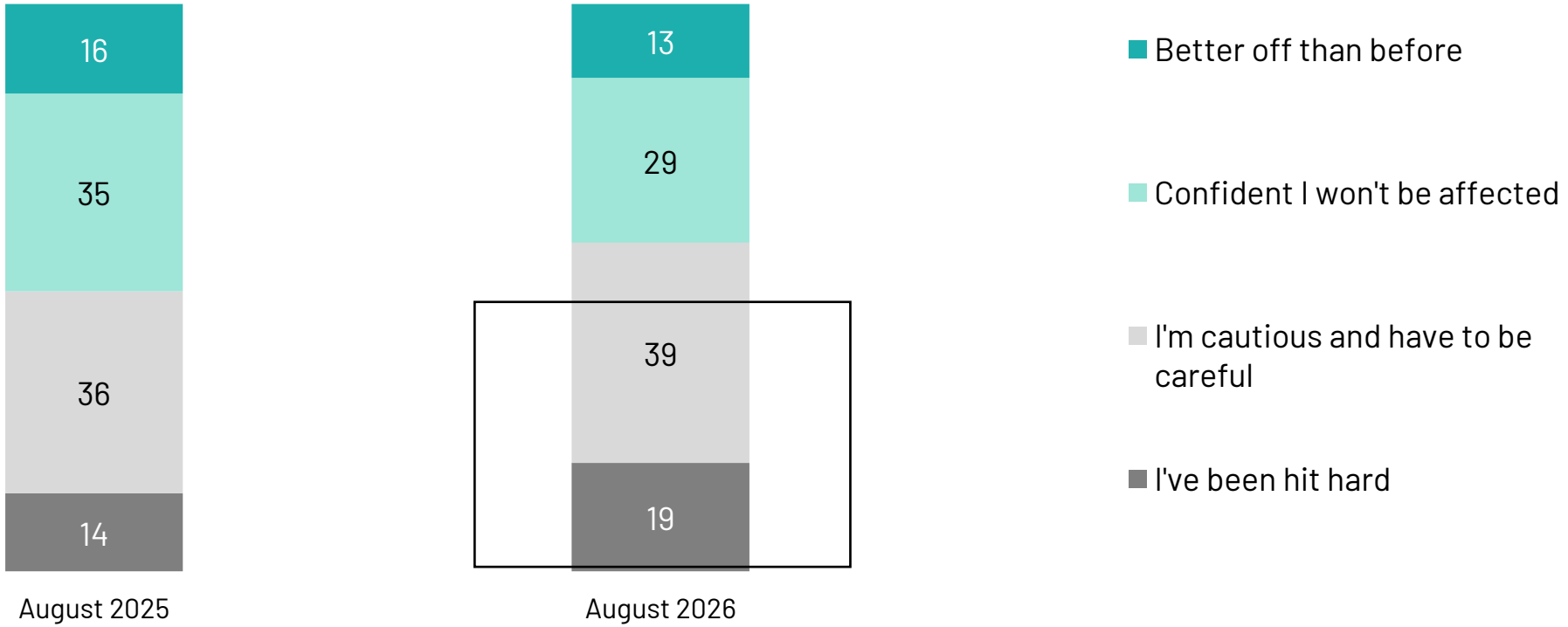
Reduction in frequency seen across life stages this year

Change in attraction visiting amongst ACTIVE attraction visitors (%)



IPSOS TRAVEL AND TOURISM BAROMETER. VAC5. Generally speaking, are you visiting UK attractions more, less or about the same as a year ago?
Base: August 2026 Visited attractions in last year (1,295)

Families are less financially confident than a year ago



IPSOS Travel and Tourism Barometer Q17: There has been a lot of talk about how the 'cost of living crisis has affected people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: Families. August 2025 = 686; August 2026 = 564.

THE UK WEATHER PLAYED A ROLE IN ATTRACTION VISITING THIS SUMMER

Another record-breaking summer

UK on track for one of the warmest years on record after warm September

Temperatures soar to 38C as amber extreme heat warning in effect

Britain braces for fourth heatwave of year as fire chiefs issue public appeal

Temperatures up to 35C forecast, triggering heat health alerts and pleas to take care in parched parks and rural areas

NEWS

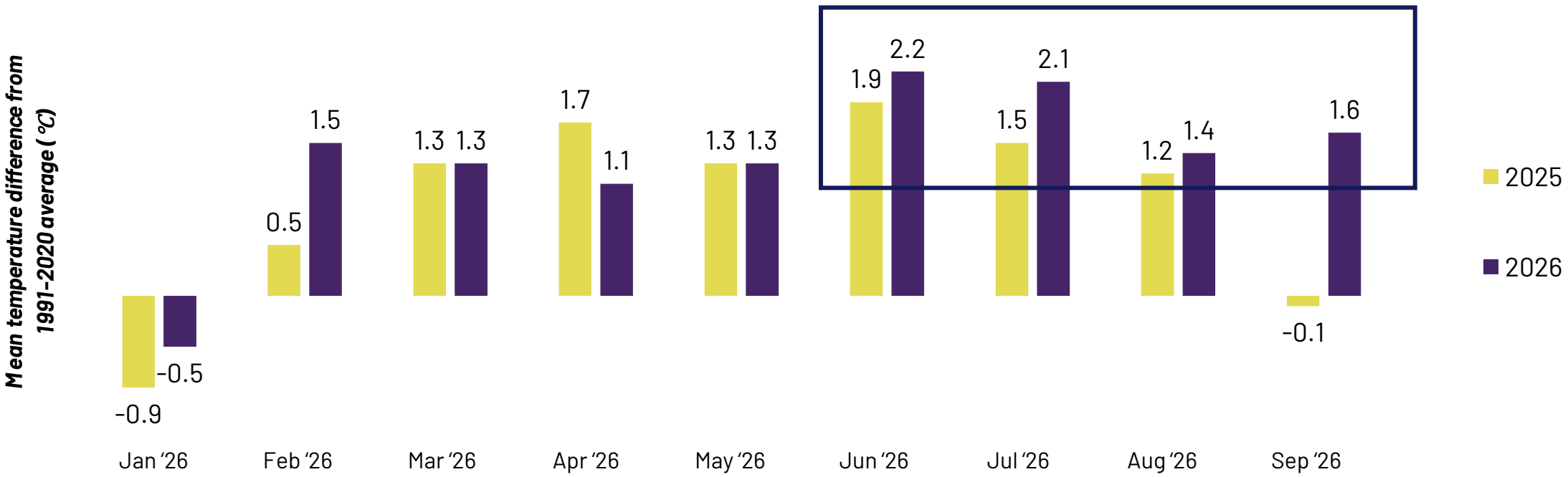
Summer 2026 provisionally hottest on record for the UK

Author: Met Office

13:00 (UTC+1) on Tue 1 Sep 2026

...with even higher than average temperatures compared to last summer

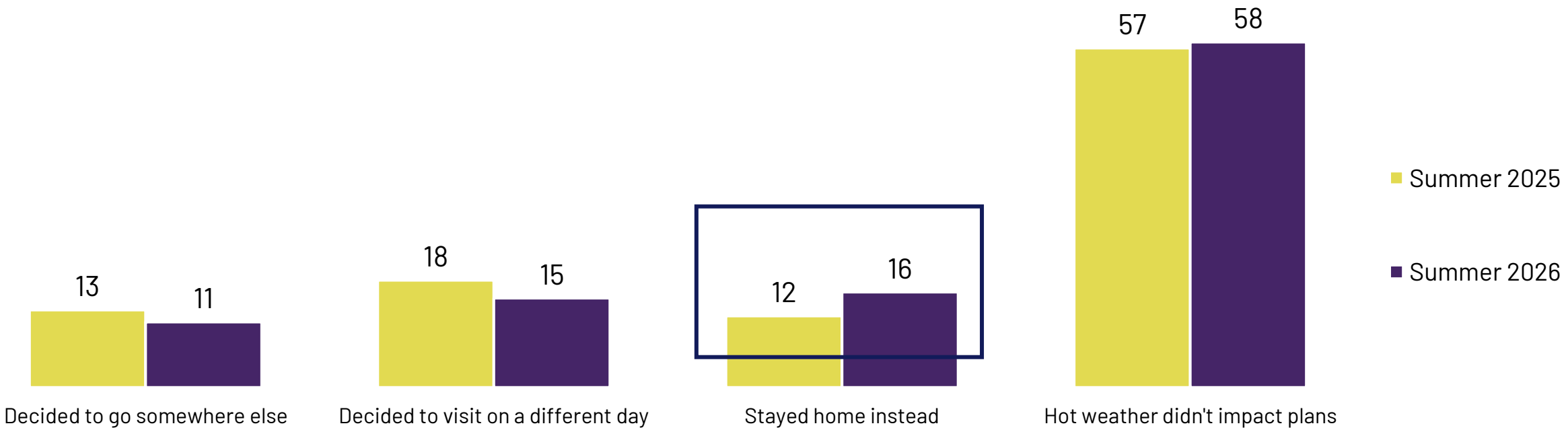
UK temperature anomalies in 2025 and 2026 vs 1991-2020 average



Source: Met Office UK temperature, rainfall and sunshine anomaly graphs

Higher temperatures meant more people cancelled their plans to visit attractions this summer

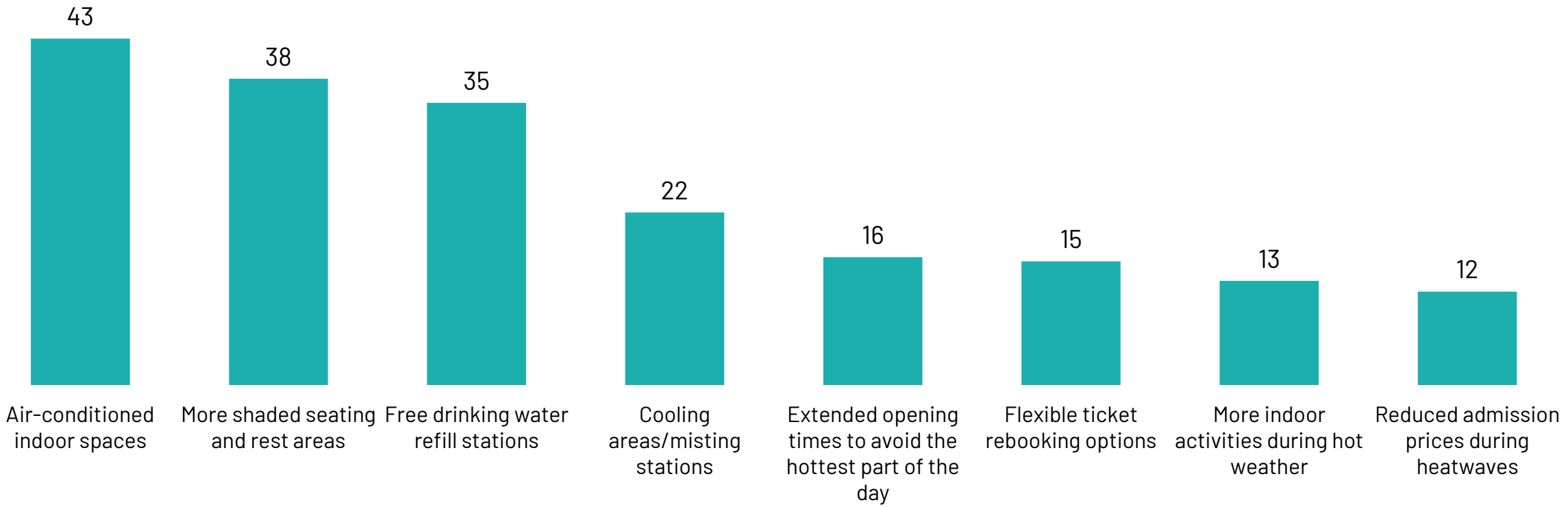
Impact of weather on plans to visit attractions this summer (%)



IPSOS TRAVEL AND TOURISM BAROMETER VAC2026_2. Thinking back to this summer, did hot weather cause you to change your plans or stop you from visiting an attraction? Base: All respondents September 2026 (1,750)

Comfort measures are the biggest drivers of reassurance during hot weather

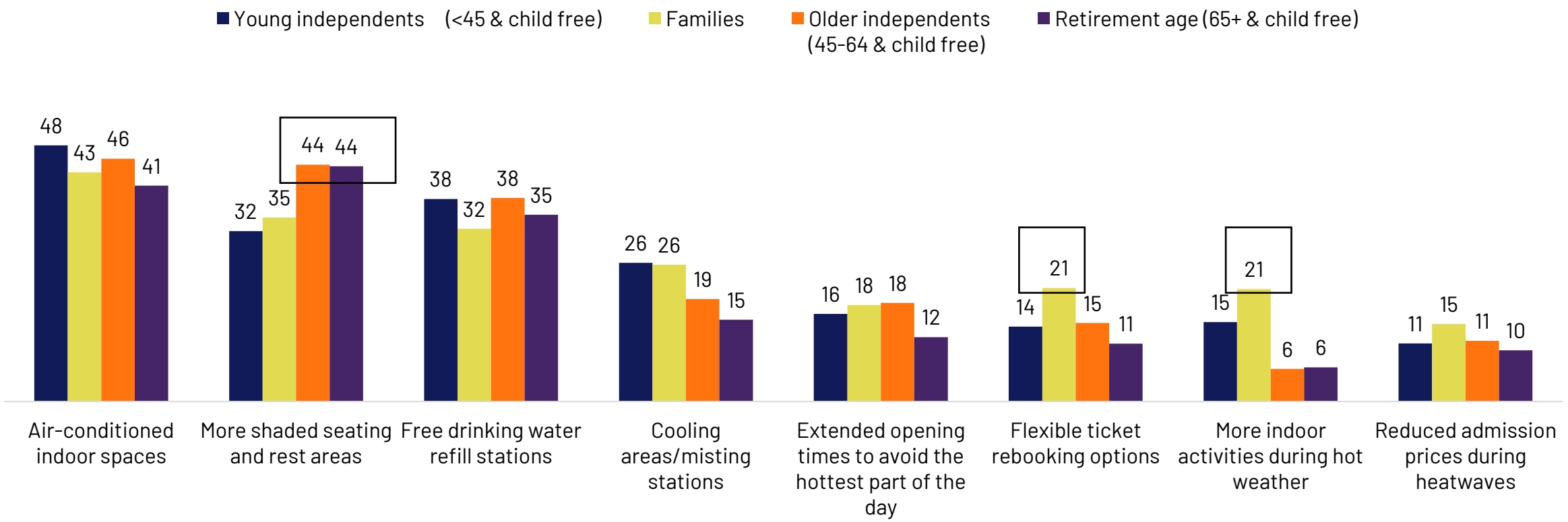
Measures the UK public would like to see at attractions during hot weather (%)



IPSOS TRAVEL AND TOURISM BAROMETER VAC2026_4. Which measures would make you more likely to visit an attraction during hot weather? Base: All respondents September 2026 (1,750)

However, strength of preference varies by audience for some measures

Measures the UK public would like to see at attractions during hot weather by life stage (%)



IPSOS TRAVEL AND TOURISM BAROMETER VAC2026_4. Which measures would make you more likely to visit an attraction during hot weather? Base: All respondents September 2026 (1,750)

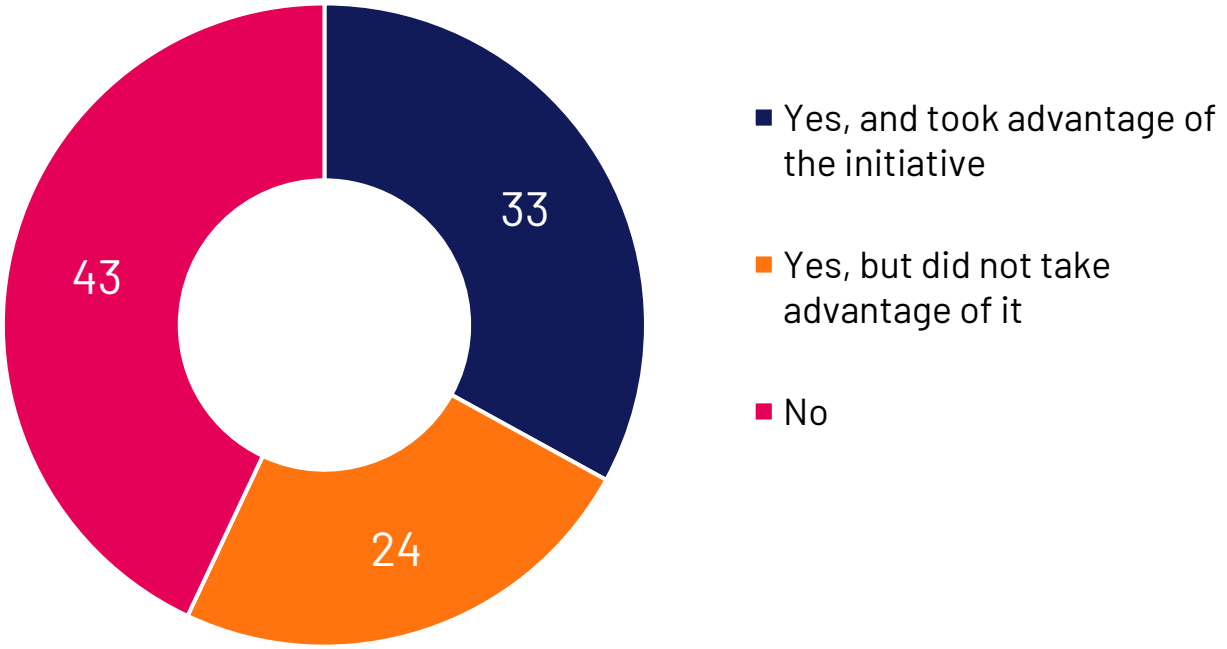
CONSUMER ENGAGEMENT WITH THE *GREAT BRITISH SUMMER SAVINGS*

Awareness was high amongst UK families, however only a third took advantage of the initiative

33%

of UK families reported using the Government's *Great British Summer Savings* initiative

Awareness of the *Great British Summer Savings* initiative (%)



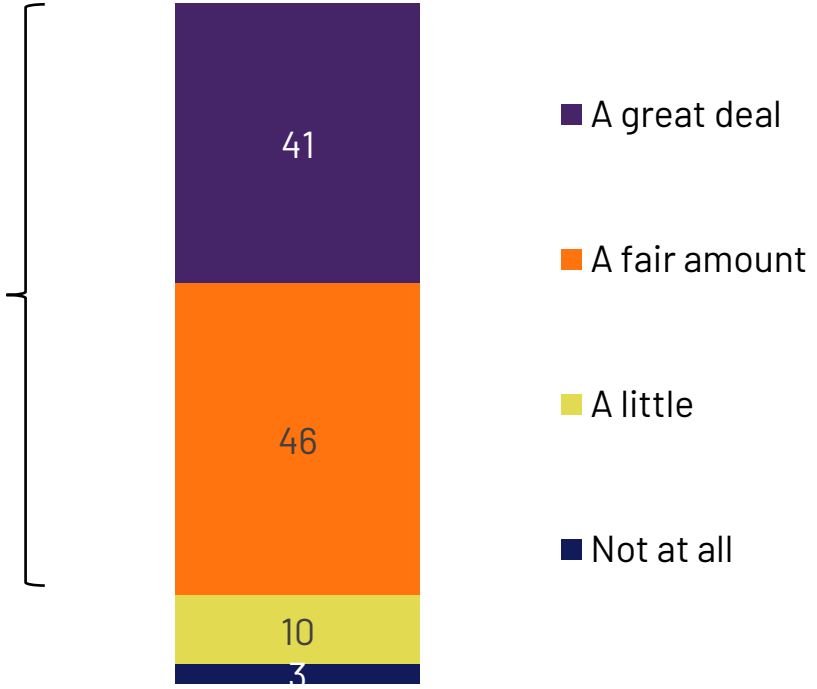
IPSOS TRAVEL AND TOURISM BAROMETER VAC2026_5. Before today, were you aware of the Government's Great British Summer Savings initiative? Base: UK families September 2026 (639)

Families who took advantage of the initiative reported that it played a role in visit decisions

Influence of the initiative on decision to visit attractions (%)

NET: HAD AN INFLUENCE

87%



IPSOS TRAVEL AND TOURISM BAROMETER VAC2026_6. To what extent did the initiative influence your decision to visit an attraction this summer? Base: All families who took advantage of the initiative September 2026 (204)

Beyond discounts and promotions, the ultimate driver of visits is a compelling offer

Afterglow at Chester Zoo

The Big Dig at London Museum Docklands

Pokémon Trading Card Game (TCG) Mega Evolution Trails at The National Trust

Dino Takeover at National Museums Liverpool

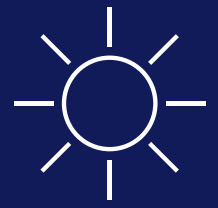
Summer Family Festival at The National Portrait Gallery

Tom Gates EPIC Adventure at Kew Gardens

Some key take outs...

Consumers continue to engage with attractions, but are increasingly maintaining rather than growing their visit frequency, likely driven by financial caution, time pressures and competing leisure activities

As financial caution continues to constrain demand, strong programming, memorable experiences and fresh reasons to visit remain critical drivers of visitation and growth



Practical heat-mitigation measures remain a priority during hot weather, but ticket flexibility, extended opening hours and all-weather experiences could help sustain visitation during future heatwaves

THANK YOU

COME AND VISIT OUR STAND!