

Marketing -
Research

Will 12 Million Visit the Dome?

Prepared for NMEC
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Estimated Visitor Numbers

Based on NOP tracking research carried out for NMEC, 5 groups have been identified within the UK population, according to likelihood to visit the Dome:

- 'Likelies' say they are 'likely to visit the Dome
- 'Persuadables' need more information before they make a decision but appear open to persuasion. They say things like 'will decide nearer the time', 'will wait to hear how good it is', 'don't know enough about it' and 'need more practical information'.
- 'Practicals' use practical excuses to explain why they are unlikely to go; 'too expensive' and 'too far away'.
- 'Cynics' dismiss it as 'not my kind of thing' or by saying 'doesn't sound very good' despite an overall lack of knowledge about content.
- 'Don't Knows' are a mix of people who are either apathetic & non-committal about visiting or a very small minority who claim not to know about the Dome.

In terms of estimating visitor numbers, the two groups of interest are the 'Likelies' in particular and also the 'Persuadables'.

Assuming a UK population of adults aged 15 and above of 47,400,000, the number of potential adult visitors are as follows (based on March 1999 NOP):

'Likelies'	12,800,000
'Persuadables'	6,600,000

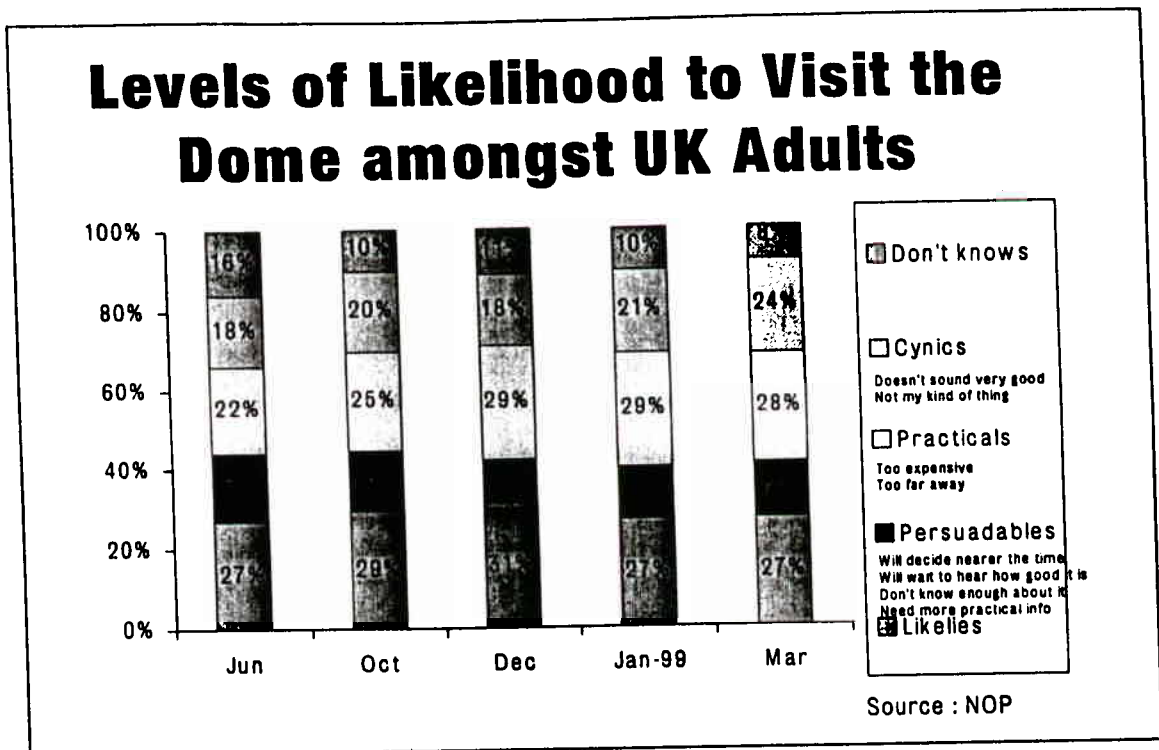
There are also children, school parties and international visitors to take into consideration, estimated as follows:

Kids 5-14	estimated between 2m & 3m visiting with friends or family
International	estimated at 2.4m
School parties	1m free places + paid for places

This gives a total 'pool' of potential visitors of between 18 m & 26 m, suggesting that the estimate of 12 million visitors is conservative.

Changes in Levels of Interest in Visiting the Dome

The 5 groups mentioned previously have been tracked for the last 10 months and the graph below shows that levels of interest in visiting the Dome have remained fairly consistent throughout that time.



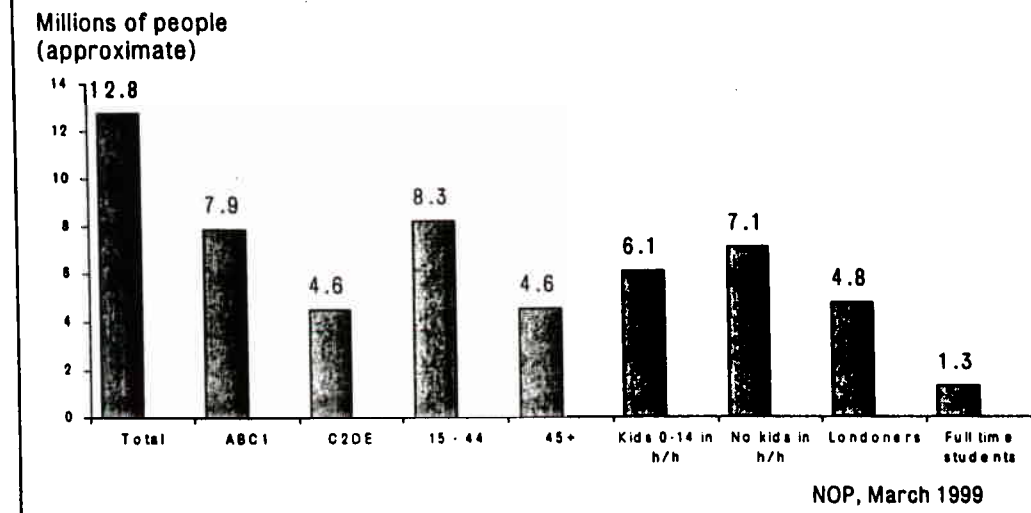
Numbers of UK Adults 'likely' to Visit the Dome by Demographics

As mentioned earlier there are an estimated 12.8 million UK adults in the group of 'Likelies'.

The graph below shows how this group is divided amongst certain demographic groups.

There are demographic biases expected, such as a bias towards ABC1 15-44s & Londoners but the graph shows that there is a reasonable spread of interest amongst all areas of society.

Millions of UK Adults 'Likely' to Visit the Dome



Attitudes towards Visiting the Dome amongst Kids 8-15

Previous visitor figures have concentrated on levels of interest shown by adults, and child numbers have been estimated based on levels of interest shown by parents. In April 1999 a piece of quantitative research was carried out by The Research Business International that spoke to 8-15 year olds directly. During this research the children were shown a limited amount of information on Dome content and below are their levels of interest in visiting the Dome recorded both before & after the content was presented, which are extremely encouraging.

Would like to visit the Dome with family 76%

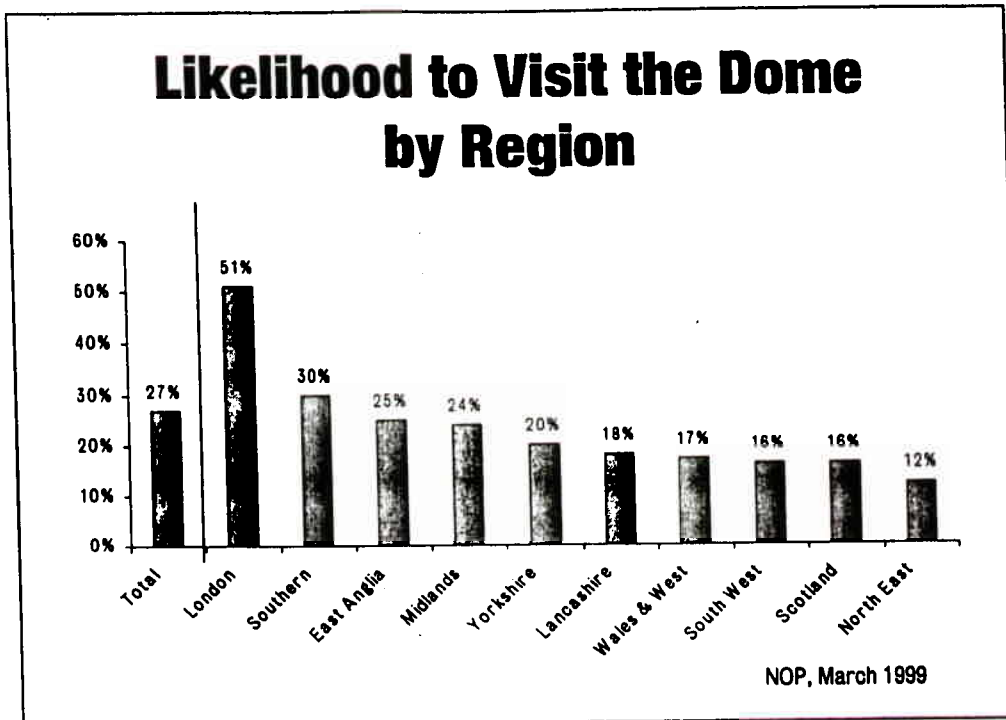
Would like to visit the Dome with friends 54%

Post introduction to content:

Think they will visit the Dome 90%

Likelihood to Visit the Dome by Region

As mentioned previously, there is a bias in interest levels towards Londoners. The graph below shows how interest levels vary across the whole country, based on NOP figures from March 1999.

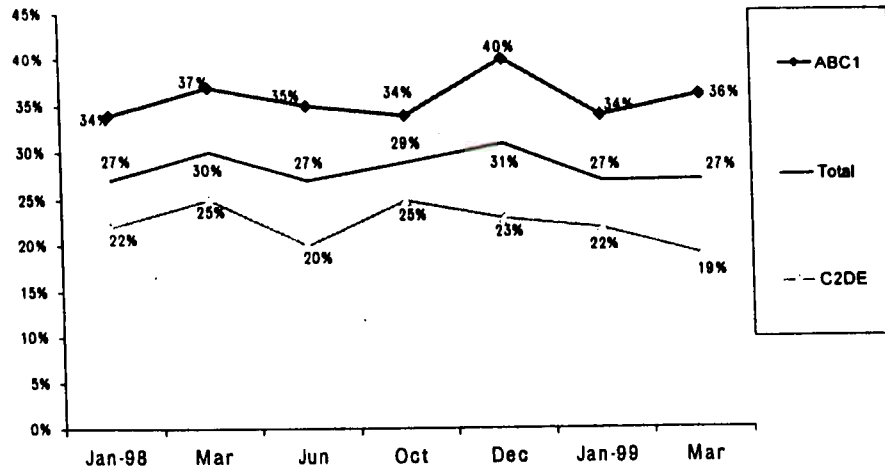


Changes in Likelihood to Visit the Dome by Demographics

The 3 following graphs show how likelihood to visit the Dome has changed over the last 15 months by social grade, age and other demographic groups.

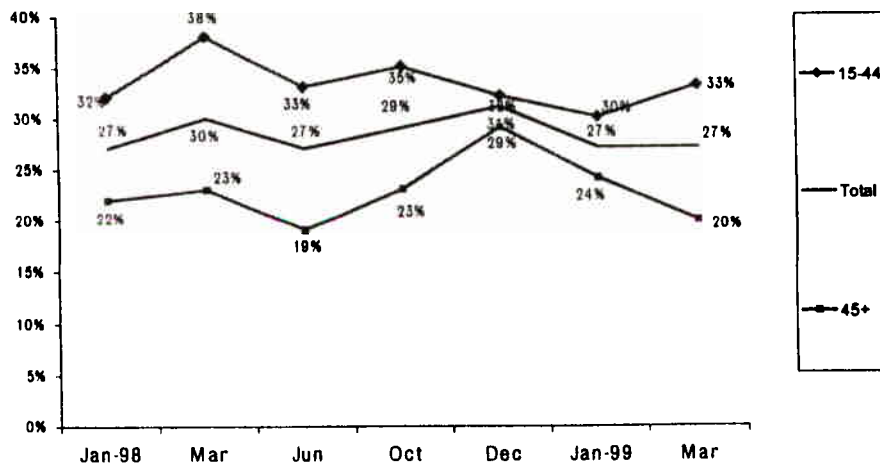
Levels of interest have remained fairly consistent.

Likelihood to Visit the Dome by Social Grade



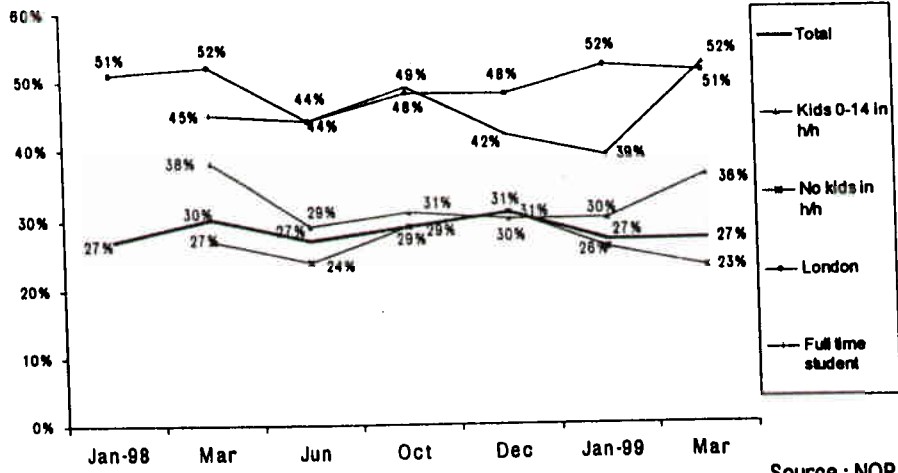
Source : NOP

Likelihood to Visit the Dome by Age



Source : NOP

Likelihood to Visit the Dome by Demographic Group



Source : NOP