Behavioural Insights Report

A behavioural analysis into specific audiences to support Mid Wales Tourism and their partners in their COVID-19 recovery programme

MWT Cymru

2020

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Executive Summary

The impact of COVID-19 on the tourism and hospitality sector has been immense, significantly changing how these industries function going forward. Mid Wales Tourism (MWT) are aware that there will be a change in how people perceive travel as a result of the pandemic. There continues to be fear amongst consumers and communities. Safety is the number one concern and MWT understand that they will have to adapt to this new perception of risk.

Simultaneously, there has been growing worry across rural regions in the UK; local communities who may feel visitors from outside their region threaten their personal safety and security of their community.

As demand for domestic tourism grows, it is important to position mid Wales as a safe haven for tourists. It's also important that MWT and its partners are able to attract the right audiences - those who are respectful of the region and its attractions - in order for their communities to feel safe as tourism resumes.

Lynn PR have been appointed by MWT to conduct behavioural insights (BI) research into two key audiences to support the re-opening of the tourism sector in the region:

- Tourists travelling to the mid Wales region
    - Those who live in Wales
    - Those who live between 2-4-hour drive time
    - Those who have previously visited Wales (repeat visitors)
- Communities living and working in the mid Wales region
    - Business owners e.g. hotels, B&Bs, restaurants, attractions, shops
    - Residents

Methodology

Lynn PR have undertaken primary and secondary desk research to better understand the specific challenges facing the sector. We have reviewed:

- Consumer sentiment reports (1 May 2020 -16 June 2020)
- COVID-19 impact surveys by Welsh Government
- Visitor Economy/ Tourism: Guidance for a phased return in Wales
- Visit Britain Sentiment Tracker
- Visitor Economy guidance documents
- Wales Tourism Business Barometer 2020: Covid-19 Impact Wave 3 Report
- Marketing assumptions and consideration points

We also reviewed:

- Bank of England Monetary Policy Report
- ONS Profile for Wales
- Wales population data
- MWT Cymru website
- Current news articles relating to policy changes in Wales and the wider United Kingdom

We held 11 consultation sessions with mid Wales business and community stakeholders.

We spoke to the following organisations:

- Visit Wales
- BBNP, Powys & Ceredigion local authorities
- Business owners
- Community & Mid Wales Tourism Forum representatives

We used our desk research and analysis, coupled with consultation insights, to develop this Behavioural Insights Report. We have used a combination of behavioural science frameworks (Behaviour Change Wheel, COM-B, EAST) and academic literature to develop these insights and propose recommendations, all of which is sourced in the analysis below.

PESTLE analysis

Issue / Trend	Positive impact on the organisation	Negative impact on the organisation
POLITICAL 1. England govt policy different to Welsh 2. Rules change every 21 days. Next change on 6th July (Wales Govt. 2020)	1. Less English tourists could put locals at ease (Consumer sentiment report June 9th) 2. If conditions allow, restrictions will ease every three weeks	1. Confusion could lead to reduced intent for domestic tourists from all regions. (Visit Wales Marketing - Assumptions Doc) 2. Difficult for all stakeholders to make plans with time spent planning and re-planning every three weeks
ECONOMIC 1. Recession and income security (BoE, 2020)	1. Consumers have indicated support for UK domestic travel to support local (consumer sentiment report June 9th)	1. Travel and leisure is a luxury and with the reduction in job security and savings, holidays may be cut or delayed to 2021
SOCIAL 1. Public fear of second wave (Consumer Sentiment report May 18th) 2. Fear of hygiene standards (Consumer Sentiment report May 18th) 3. Increase in intent for seaside and rural/ open outdoor visits (Consumer Sentiment report May 1st) 4. Use of facemasks (Wales Govt, 2020) 5. Shielding and protecting vulnerable people (Wales Govt, 2020)	1. Easier for domestic visitors to deal with ramifications than overseas visitors 2. Easy to communicate as hygiene standards should already be high 3. Potential to increase mid Wales market share vs city regions like Cardiff. 4. Reduces risk of spreading coronavirus 5. Protecting and valuing the vulnerable in society	1. Second wave would result in closures and need for possible refunds 2. People may not come due to the concern that accommodation is not cleaned properly 3. Tourists may avoid coming due to unwelcoming locals (Visit Wales Marketing - Assumptions Doc) 4. Social pressure can be felt by those not wearing masks (reckless and selfish) as well as those wearing masks (paranoid and overreacting) 5. Reduction in potential older tourists -35% (Consumer Sentiment report May 18th)

TECHNOLOGICAL 1. Contactless payments recommended (Govt Wales, 2020) 2. 'Good to Go' Online Certificate (Welsh govt - News and Alerts, 2020)	1. Faster payments and keep customers and staff safer with less physical note and coin exchange. Limit has been raised to £45 (UKFinance.org 2020) 2. Gives confidence to customers and employees	1. Expensive for small and medium sized organisations to implement 2. Technical capability barrier
LEGAL 1. Lockdown rules and regulations changing so frequently (Visit Wales Marketing - Assumptions Doc) 2. Track and Trace (Welsh Govt, 2020) 3. Non-essential business closure, different businesses are returning at different times e.g. bars vs hotels (Welsh Govt, 2020) 4. 5 mile radius movement restriction (Welsh Govt, 2020) 5. Physical Distancing (2 meter rule)	1. More tourist friendly regulations could be passed, even bringing England in line with Wales, reducing message friction 2. Easier to keep staff and customers safe 3. Locals feel more comfortable with reduced tourist numbers 4. Increase the possibility for staycations 5. Customers and staff will feel safer	1. People nervous about breaking lockdown rules 2. Extra administration and management to ensure employees are following guidelines and getting tested when necessary 3. Many businesses have symbiotic or ecosystem like effects on each other. Having accommodation services without leisure and entertainment can reduce interest in tourism. 4. Such a distance limit is not just problematic for visitors from other regions but also Welsh visitors travelling to mid Wales 5. Reduced capacity and revenue
ENVIRONMENTAL 1. Changes to public transport use (Wales Govt, 2020) 2. Impact of tourism on environment (Wales Govt. 2020) 3. Beauty spots are closed (Wales Govt. 2020)	1. Encourage cycle and hiking tours through mid Wales 2. More people can reduce carbon emissions by cycling 3. Eco tourism can put tourism money into business that respect SEA and other govt recommendations 4. Beauty spots have opportunity to improve environment education and recover from potential overuse	1. Could be a problem for those that would normally drive or take a coach. Encourage further visitors to stay more local 2. Cycling and walking reduces the distance and increases the time that tourists travel (vs car, train, bus, plane) 3. Tourists litter and produce carbon emissions by using certain private and public transports 4. Reduction in eco-tourism

Defining the problem in behavioural terms

This report recommends four broad behavioural goals to support MWT and its partners in its recovery programme:

1. Attracting responsible visitors to Wales
2. Encouraging visitors to spend money in the Welsh economy
3. Encouraging tourists and locals to practice safe behaviours (such as social distancing, wearing a mask, and washing one's hands frequently)
4. Encouraging locals to welcome visitors (by greeting, assisting, or socialising with them)

These goals are analysed below, and interventions to pursue them are discussed.

Both the analysis and the interventions are meant as starting points from which to delve deeper into the subject matter.

Behavioural Insights Survey

As part of this report, Lynn PR conducted two quantitative surveys amongst tourists (both current and prospective) and local communities. The purpose of each survey was to validate or disprove behavioural hypotheses that we developed as part of this report. These surveys are the first behavioural insights surveys undertaken by MWT, primarily using the COM-B framework to model questions around capability, opportunity and motivation.

A total of 2,175 people were surveyed anonymously – 1,568 tourists and 607 local communities, respectively. The surveys were delivered bilingually, and no personalised information was collected.

We recruited participants using social media channels, as well as a pop-up screen on the VisitMidWales.co.uk website. We incentivised participation by a prize draw.

Please note: There are limitations to a researcher's ability to draw firm conclusions about behaviour in the real world based on a survey's results.

We made a few observations:

1. There seemed to be a difference in how tourists perceived Wales, and how Welsh locals perceived tourists. Of the people who took the tourist survey, 60% made positive statements about the country, 28% made negative statements, and 12% made neutral statements. Of the people who took the local communities

survey, however, 3% made positive statements, 92% made negative statements, and 5% made neutral statements.

2. The most frequently cited topic by tourists had to do with visiting mid Wales in the past; "return tourists" were generally very positive towards the country. The most frequently cited topic by locals had to do with tourists behaving poorly, e.g. ignoring COVID-related safety advice like social distancing, and engaging in discourteous behaviours like littering.

Key findings from the surveys in relation to COM-B hypotheses
The surveys were conducted to either confirm or deny our behavioural hypotheses. These are the hypotheses that were confirmed using data insights from the surveys:

Behavioural goal	Target behaviour	Changes supported	What needs to happen for the target behaviour to occur?
Behavioural Goal 1 Attract responsible visitors to Wales	Responsible tourists choose mid Wales as a destination	Change supported – Psychological capability 33% strongly agreed and 32% agreed with the statement "I know why I should choose mid Wales for a holiday." 25% neither agreed nor disagreed with the statement "I have seen advertising and promotions about mid Wales as a holiday destination" 15% strongly agreed and 21% strongly disagreed with it.	Know why they should visit mid Wales
		Change supported – Automatic motivation 31% neither agreed nor disagreed with the statement "I am fearful about taking a holiday this year because of the coronavirus" 11% strongly agreed and 15% strongly disagreed with it.	Do not care about (or are less fearful of) any negative consequences (fear) of taking a holiday due to COVID-19

Behavioural Goal 2 Encourage visitors to spend money in the Welsh economy	Tourists spend money in mid Wales	Change supported – Physical opportunity 34% strongly agreed, 29% agreed and 32% were neutral to the statement "When in mid Wales, I find making payments to local businesses easy and hassle-free"	Finding making payments in mid Wales, or to mid Wales businesses, easy and hassle-free
Behavioural Goal 3 Encourage visitors to engage in safe behaviours	Practice social distancing, wear a mask, and frequently wash their hands	Change supported – Social opportunity 30% were neutral to, 16% strongly agreed with and 11% strongly disagreed with the statement "I see people around me (friends, family and local community) wear masks in public spaces (in public transport, shops)"	Have to be embedded in social situations which encourage safe behaviours
Behavioural Goal 4 Encourage local communities to perform welcoming behaviours	Locals greeting, assisting, socialising, etc. with tourists and visitors	Change supported - Social opportunity 29% were neutral to, 35% agreed with and 25% strongly agreed with the statement "I see people around me (friends, family and local community) greet tourists with a smile and welcome them to our region"	Have a social opportunity to engage in social interaction

1. Attract responsible visitors to Wales

What behaviour?	Responsible tourists choose mid Wales as a destination
Where does the behaviour occur?	Online
Who is involved in performing the behaviour?	Those who live in Wales Those who live between 2-4-hour drive time Those who have previously visited Wales (repeat visitors)

Analysis

Emotional state. Currently, people may be fearful and anxious. They may be afraid to stay in a hotel or B&B, eat at a restaurant, go shopping, etc. According to a recent survey, 25% of people said they would feel comfortable booking a hotel room only after a vaccine had been discovered.[1] On the other hand, people may be bored; they may be looking for new forms of diversion, a break from the routine, a respite from electronic media, rejuvenation in nature, etc.

Physical safety and perception of safety. Wales has low rates of infection and mid Wales is a rural region with low population density. These facts might give potential visitors the perception that mid Wales is a relatively safe holiday destination. This is likely to be an important consideration for many. Consider that 20% of survey respondents said they would feel comfortable planning a UK holiday "as soon as the travel confinement is over," one indication that traveling was a safe activity again.[2]

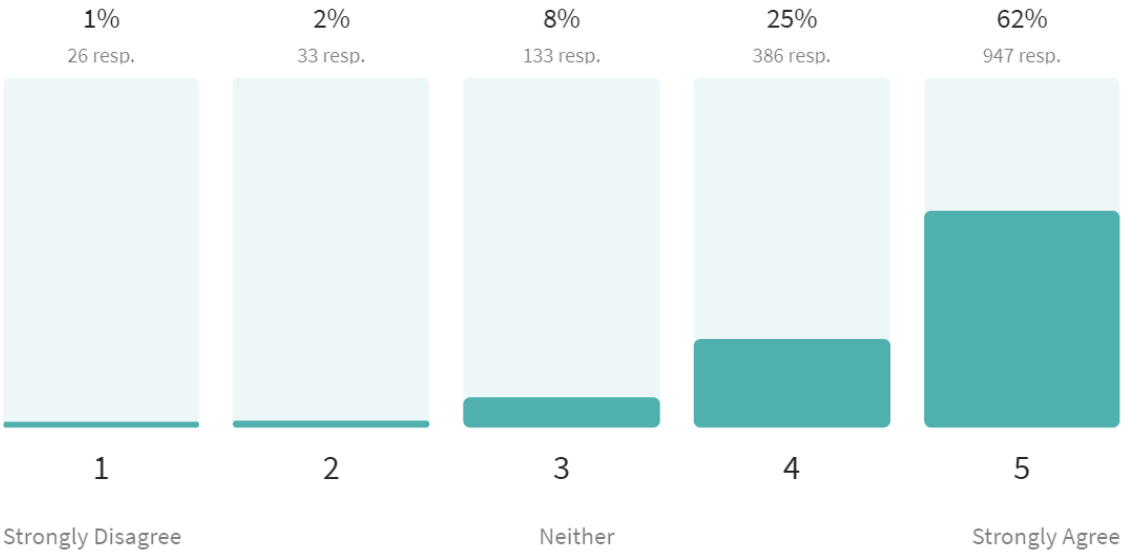
Financial cost. Many people are experiencing financial hardship. Some have lost their jobs or have been furloughed. 13% of people reported their income was not meeting their financial needs and 29% reported that their income was just meeting their financial needs.[3] However according to the results of Lynn PR's tourist survey, 62% strongly agreed with the statement that they had enough money to visit mid Wales.

[1] Tracking Consumer Sentiment on the Impact of COVID-19: Travel & Mobility, Leisure & Hospitality, Personal Finances, Weekly Update – 1st May 2020
[2] ibid
[3] ibid

I have enough money available to take a holiday to Mid Wales this year

1K out of 1K answered

4.4 Average rating



Barriers

1. People do not consider taking a holiday
2. People decide against taking a holiday due to fear of COVID-19
3. People decide against taking a holiday due to calculation of risk assessment
4. People decide against taking a holiday due to financial reasons
5. People do not know what mid Wales has to offer
6. People decide on taking a holiday to mid Wales but are deterred in planning
7. People choose another location to take a holiday

Diagnosis

What needs to change? Psychological capability and Automatic motivation

Objectives

1. Increase the percentage of "signs of interest" in visiting mid Wales
    a. Open rate, click-thru of an advertisement email / MWT e-newsletter
    b. Website traffic to visitmidwales.co.uk
2. Increase the number of referrals from MWT platform to businesses' websites
3. Increase the £'s generated in online bookings via MWT website

Interventions

Communication campaigns can systematically test the importance of highlighting these and other factors. Of course, the details of such a campaign will depend on data availability, existing capacities, etc.

An example of a fairly standard behavioural science-based approach would be to conduct a randomised controlled trial (RCT) that involves sending an email to a set of individuals. These could be people who have visited Wales in the past year, who live less than four hours away by car, who have a family connection to the country, who match the socio-demographics of Welsh visitors, etc. There could be multiple versions of the email; the first might emphasise emotional considerations; the second, safety considerations; and the third, financial cost. Outcome measures would investigate the extent to which individuals open their email; click on a link in it; and put down money to make an arrangement to visit mid Wales. As referenced above, we would recommend conducting trials keeping English-language and Welsh-language audiences in mind, and this might warrant separate language-specific experiments that test if certain interventions motivate specific groups of people but not others. The most effective email could then be sent to people who were not participants in the trial.

Or alternatively, a second test could be conducted, building off of the results of the first.

If the emails came from Welsh businesses that individuals have frequented in the past, they might be particularly effective. More than 90% of the people who took the tourist survey said that they had spent a holiday in Wales previously; and 67 made positive statements about the country; 5 made neutral statements; and none made any negative statements. Said one respondent: "I have been visiting [W]ales since [I] was 7 years old, now [I am] nearly 50 and have never been abroad. Wales is the only holiday destination [I] have ever been to…[I] would never go anywhere else." Welsh businesses could focus on leveraging this pre-existing sentiment to lure tourists back.

It is also important to consider choice architecture – the environment within which individuals make their decisions. In this case, the website visitmidwales.co.uk could be

more efficiently designed to enable ease of booking and reduce any unnecessary hassle (friction) e.g. multiple clicks to get to bookings pages, when individuals are making their decision to visit mid Wales.

The navigation could be better optimised to draw attention to booking overnight accommodation and showcase the experiences and adventures available in mid Wales. (Many survey respondents (35) made comments related to finding information about / being able to book lodging or activities. The majority of these comments were negative. For example, one person said: "Trying to book somewhere for less than a week but longer than a day is proving to be a nightmare.") The website could also make calls to action more attractive by using colours more effectively, appealing to audiences' emotional states. Finally, the content could be framed in a way that appeals to individuals' unconscious motivations using levers such as loss aversion, scarcity, and social proof.

Example content:

Loss aversion: "Don't miss out…."

Scarcity: "Limited availability for…"

Social proof: "This year, we have welcomed XXXX tourists to mid Wales. Join them today and plan your mid Wales getaway."

2. Encourage visitors to spend money in the Welsh economy

What behaviour?	Tourists spend money in mid Wales
Where does the behaviour occur?	Online (when booking accommodation and experiences) Local shops (e.g. farmer's markets) Local attractions (e.g. Powis Castle) Experiences (e.g. boat-trips)
Who is involved in performing the behaviour?	Tourists to mid Wales

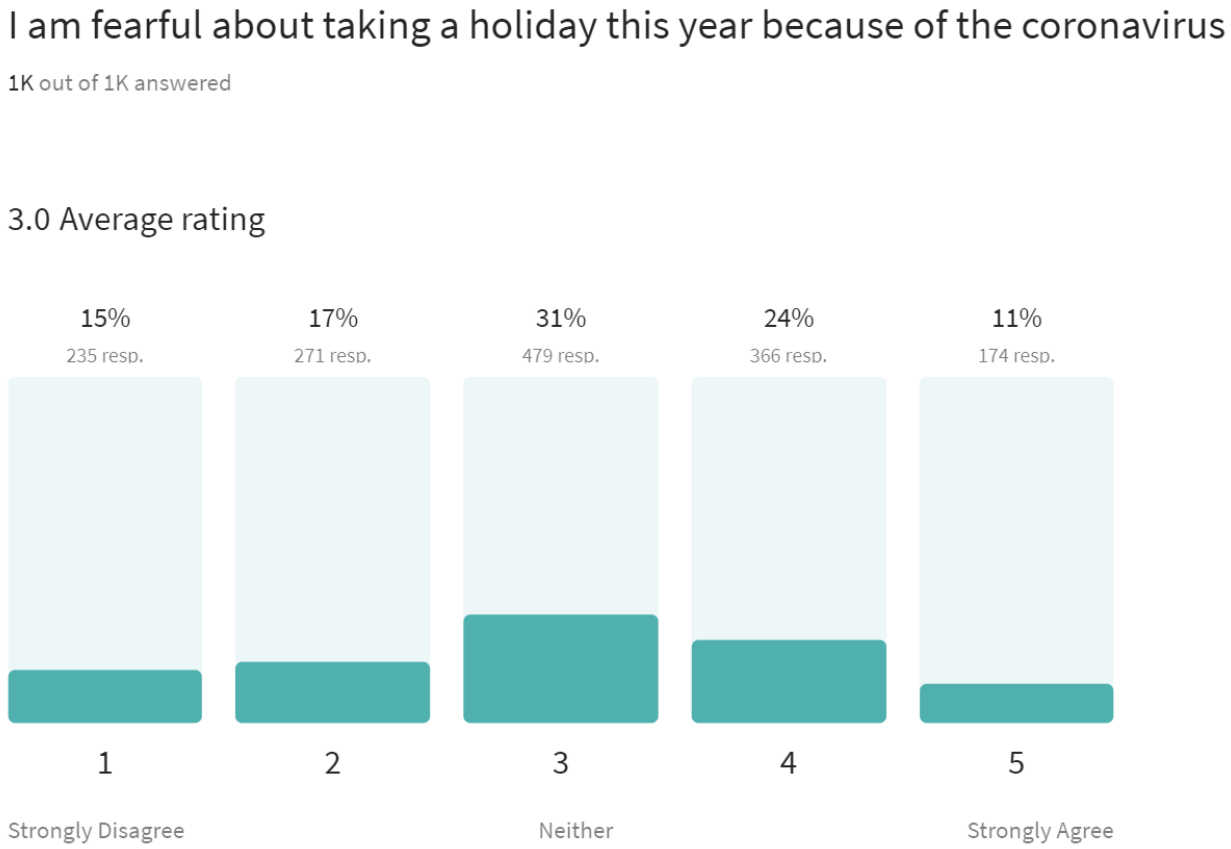
Analysis

Length of visit. In 2018, there were 96 million day-visits to Wales which collectively generated £4 billion in expenditure. During the same period, there were 10 million overnight visits which generated £1.8 billion.[4] Hence, an average overnight visit (£180) generated more than four times the expenditure of average day-visit (£41). If some percentage of the day-visits in 2020 were converted to overnight visits, the impact could be large.

Economic concern. Many businesses in Wales have been negatively impacted by the coronavirus. According to the government: "There has never been a crisis of this magnitude for [the] Wales visitor economy, activity has all but reduced to zero and there are acute cash flow problems for businesses across the sector…"[5] In contrast to classical economic models that assume a consumer's behaviour is entirely selfish, behavioural economics allows for altruistic concerns to impact consumer choice. In other words, consumers might be more willing to purchase goods and services they would not otherwise (or be more forgiving of higher prices) in light of this crisis. This might especially be true, if consumers feel some connection to the businesses and their employees, and/or have a sense of the difficulties they are facing.

Safety concerns. Visitors to Wales might be fearful of going to shopping venues, spending a prolonged period of time in such areas, and/or purchasing physical goods. This was the most prominent concern shared among respondents to Lynn PR's survey. More than one third of respondents (35%) said they either agreed or strongly agreed with the statement "I am fearful about taking a holiday this year because of the coronavirus."

[4] Welcome to Wales: Priorities for the visitor economy 2020 – 2025, Summary of Evidence Base (source)
[5] Visitor Economy/Tourism: Guidance for a phased return in Wales, Last updated 7 June 2020



Roughly 13% also made some additional comments regarding safety, almost all of which were coded as negative in sentiment. For instance, one person noted that the public was not "good at social distancing" and was "surprised more people aren't wearing masks in supermarkets". These concerns might impact tourists' total expenditure in their visit. It might shift what goods and services they purchase; how they purchase them; and the price at which they purchase them. For instance, they might make more online purchases, and be more willing to pay a premium for goods and services that they perceive as safe.

Geographic considerations. Many tourists visit a relatively small number of popular locations in Wales. For instance, roughly one third of international visitors stay in Cardiff when visiting the country.[6] Steering visitors to less well-trodden locations might ensure that the economic benefits from tourism are distributed more evenly throughout the country. This could be adapted by promoting lesser-known areas in your marketing campaign as well as devising specific "secret" or "the road less travelled" getaways on the website.

[6] Welcome to Wales: Priorities for the visitor economy 2020 – 2025, Summary of Evidence Base (source)

Barriers

1. People visit for a short period of time
2. People do not understand the benefits of a longer visit compared to a day visit
3. People have concerns with physical safety of visiting Town Centres
4. People are unaware of opportunities to spend money (e.g. experiences, restaurants, attractions)
5. People are unaware of the positive effect of their investment on the economy

Diagnosis

What needs to change? Physical opportunity

Objectives

1. Increase the proportion of overnight visitors to day-visitors who have booked online using MWT website

Interventions

How might the government and businesses convert day-visits to overnight visits, and short overnight visits to longer ones? One natural place to start would be to investigate the context in which people make such decisions. Roughly, a quarter of domestic holidays in Wales are booked through websites like Expedia and Booking.com, a third directly through the accommodation provider, a tenth through a tour operator, and another tenth through a travel agent.[7]

There are many ways in which these venues could encourage longer stays. Consider the "decoy effect". Suppose a customer is faced with two options: option A is a hotel reservation for one night at 80 pounds and option B is a reservation for two nights at 140 pounds. Some significant number of customers could be induced to purchase Option B if Option C were added: a hotel reservation for two nights at 150 pounds. This option is inferior to B and in comparison, makes option B look more attractive.[8]

A second strategy might be to utilise the concept of "operational transparency".[9] This involves showing potential customers the work and resources that go into serving them. A flexible concept, it can be applied in many contexts. One experiment

[7] Welcome to Wales: Priorities for the visitor economy 2020 – 2025, Summary of Evidence Base (source)
[8] See Shlomo Benartzi's *The Smarter Screen* for many more examples.
[9] Harvard Business Review, Operational Transparency, Ryan Buell (source)

demonstrating the principle took place in a school cafeteria. Typically, students who wanted to request a hamburger filled out a slip of paper, which was relayed to a cook in the kitchen. Because of the cafeteria's design, the students did not see the cook making their food, nor did he see the students. On certain days, however, an iPad was placed in the cafeteria line with a video feed to the kitchen showing the cook flipping burgers, and a second iPad was placed in the kitchen with a video feed showing students. Occasionally, an expression of gratitude or acknowledgement was transmitted between the students and cook. This increased visibility impacted the perception of the food. On days when the cook could see the students and the students could see the cook, students rated the food as 22% better.

A second experiment demonstrating operational transparency took place in an online retail market. It involved showing consumers who were interested in purchasing a wallet details that they typically would not see, e.g. the cost of the raw material, its construction, its transportation, etc. When this extra information was displayed, sales increased by 26%. Hopefully, these examples illustrate the idea that Welsh companies can benefit by being intentional about showing customers the work that goes into serving them; by putting a bit more "humanity" in commercial transactions; etc. This strategy might be especially powerful if businesses can show how they have been impacted by the economic crisis.

Such a message might especially resonate with Welsh people in particular. 76% of those who took the survey in Welsh strongly agreed with the statement "I understand why it is important to support local businesses by spending money in Mid Wales". 60% of this cohort strongly agreed with the statement "When visiting mid Wales, I remember to spend money in the local economy…" The equivalent figures were significantly lower for those who took the survey in English: 66% and 44% respectively. Again, we would recommend adapting content plans based on these findings, and testing language-specific narratives and calls to action to see what drives action.

In behavioural economics, the "sunk cost effect" implies that people are unlikely to revise their plans for the future, if some of the plan's associated costs have already been incurred. A common example: investors may continue to support a business financially after it has failed. They would rather lose more money than face the painful fact of its failure.

Some businesses have incorporated this idea into their refund policy. If, for instance, a person puts down money to reserve a hotel room and then later considers cancelling that reservation, he may only be entitled to a portion of his money (and would lose the rest of it). The hotel has, in essence, figured out that he is unlikely to change his plans if he has already "sunk" some money into them. Building off of this idea, one academic paper shows that people's intention to cancel their travel plans decreases as this sunk

cost increases.[10] The takeaway lesson for businesses is simple: have an unforgiving refund policy.

However, this is probably not an optimal solution at present. Societal circumstances are in flux, and punishing potential clients for events that are far beyond their ability to control – like "second wave" of a pandemic – does not seem fair. Nor does it seem like a good business move. Tourists considering a trip to Wales might be less likely to undertake one if they know that they will lose a lot of money if they have to cancel it.

One "compromise" solution might be to encourage businesses to create a default policy in which customers' pre-planned trips are postponed to a later date, rather than cancelled, if COVID-related problems worsen. This would help businesses recoup some money they would otherwise lose from cancellations.

A second route would involve giving full refunds to customers (and cancelling reservations automatically). This approach may seem counterintuitive to businesses who may perceive this as losing money; however, by demonstrating a gesture of goodwill, businesses will be able to activate the "reciprocity effect" - a social norm of responding to a positive action with another positive action. By offering a positive action (a full refund), mid Wales businesses will be able to call on a further positive action from their customers. In such a scenario where a full refund has been offered, follow up in a few months with a booking offer. If the reciprocity effect has been activated, there will be an increase in customers (those who received a full refund) rewarding the business for their previous kindness by taking advantage of this offer.

Economic theory tells us that money is "fungible" – that is, a £1 is a £1, no matter how you earn it, where you save it, and what currency or form it takes. However, behavioural economics has found that the Principle of Fungibility is often violated by "mental accounting". This is the idea that people tend to label money with many different names, creating mental pots (and sometimes physical pots, e.g. different bank accounts) from which to draw from when making purchases. However, the moment money is labelled differently, it gets spent in different ways. Using the insights of mental accounting, we can induce the "sunk cost effect" in customers by enticing them to pre-pay for products or services. Consider giving customers the opportunity to "book" pre-paid experiences and access to visitor attractions during time of booking their stay; this may be made more attractive by offering a minor discount. "Sunk cost effect" can significantly motivate consumer behaviour by nudging people to make financial commitments in advance.

[10] Sunk costs and travel cancellation: Focusing on temporal cost Source

Day visitors may be enticed into making overnight stays with discounted pricing using a combination of cross advertising and remarketing. Finally, we recommend the introduction and increased use of contactless payments. The practice helps consumers feel safe. "Far fewer establishments accepting contactless payments than I was expecting here" wrote one in the survey conducted by Lynn PR. "This feels a little less safe … [than my hometown in England]." Furthermore, contactless payments are likely to have positive economic consequences for Welsh businesses for another reason, as well. This has to do with a concept in behavioural economics called the "pain of paying". It refers, quite simply, to the negative feelings that are generated by purchasing goods and services.

Not all equally-priced purchases engender the same amount of pain. For example, a good purchased in cash tends to be more painful than one purchased by credit card. In part, this is because the transaction with cash represents a more physical and tangible loss; in part, it is because the payment with a credit card is deferred for a period of time (until the credit card bill is due). The result is that people tend to be more profligate when spending with credit cards and more frugal with cash. And in a society of contactless payments – where using credits cards is the only option – businesses will be the ultimate beneficiaries.

A set of scientifically backed protocols could be developed to minimise the threat of contracting the coronavirus while engaging in commercial activity, whilst easing safety concerns people might have. For example, a signalling system could show potential customers the date when a physical good was last handled, and the amount of time that needs to elapse before it can be handled again safely. Screen barriers could be erected between consumers and goods to minimise contact and to facilitate cleaning. Other protocols to reassure customers of their physical safety could include one-way navigation systems, markers, and anti-bacterial gel at shop entrances. A recommendation would be to create more online shopping experiences to take advantage of this new consumer habit. This would serve to reassure customers as well as provide businesses with rich data on consumer behaviours to be able to better position and sell their products and services.

How might tourists visiting Wales be steered towards less discovered locations? One option might be to highlight "bundled" trips as opposed to individual experiences, on the MWT website. For instance, an itinerary to "Explore Mid Wales in 3 days" – which suggests activities in several different locations – could be made more prominent.

Alternatively, the site could change the way it shows options to individuals who have already selected certain preferences. For example, when a person searches for "Scenic Places in the Brecon Beacons" (and does not select a filter or a preference for

the ordering of options), less well-trodden locations could be put near at the top of the resulting list.

Finally, one suggestion that combines these two ideas is to message people who have made certain travel plans (who have, for instance, booked a room in a particular B&B) about the activities and sight-seeing available in nearby, but less well-known, locations.

3. Encourage visitors and locals to practice social distancing, wear a mask, and frequently wash their hands

What behaviour?	Visitors and locals practice safe behaviours, specifically social distancing, mask wearing, and handwashing
Where does the behaviour occur?	Accommodations – hotels, B&Bs, self-contained units Restaurants, pubs, and eateries Shops Public transport – buses and trains Visitor attractions
Who is involved in performing the behaviour?	Tourists Local communities

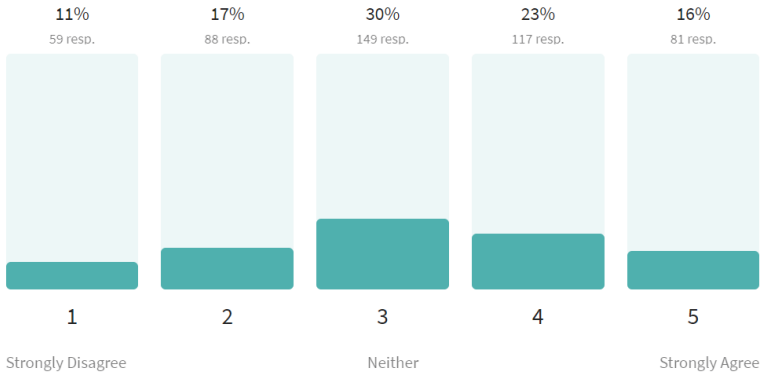
Analysis

Social norms. In a number of domains, people take cues on how to behave from others. This suggests that people might be more likely to wear a mask, say, if they see that others are wearing one. Oppositely, they might be less likely to wear a mask if they see that others are not wearing one. Of the individuals who took the English-version of communities survey, 30% of respondents, a plurality, neither agreed nor disagreed with the statement "I see people around me (friends, family and local community) wear masks in public spaces (public transport, shops)".

I see people around me (friends, family and local community) wear masks in public spaces (public transport, shops)

494 out of 607 answered

3.1 Average rating



Survey respondents also made comments regarding wearing a face mask. One said: "I would like masks to be mandatory in Wales" – a sentiment echoed by a second person who said that wearing a mask should be "compulsory…in shops." Other individuals had different opinions. A third respondent said that he "was not at all convinced that a mask makes any difference". And a fourth said that wearing a mask "gives a false sense of security [and that] those that do wear them are touching their faces more often".

Behavioural fatigue. There is some academic evidence that suggests that adherence to a regime of healthy behaviours deteriorates over time, even in the absence of the kind of social pressures described above. One commonly cited example is that people who need to take medication regularly often stop doing so at some point.

Barriers

1. People find it inconvenient
2. People are in situations in which they feel it is inappropriate
3. People do not remember
4. People lack the physical requirements (a mask, or a sink to wash one's hands)
5. People lack the will
6. People are overconfident that they will not catch the virus

Diagnosis

What needs to change? Social opportunity

Objectives

1. Increase the perception of safe behaviours / decrease the perception of dangerous behaviours, via self-report

Interventions

Much has been written about procedures to minimise the risk of transmission of coronavirus in Wales.[11] Rather than summarise or repeat this information, this section hopes to highlight a few points that might have been overlooked or under-emphasised in this discussion.

[11] Visitor Economy/Tourism: Guidance for a phased return in Wales, Last updated 7 June 2020

One point has to do with the importance of any intervention's timing – one of the four pillars of the Behavioural Insights Team's EAST framework. People should be prompted to engage in safe behaviours when it matters the most, i.e. when they are at a significant risk of contracting the disease. Prompts that are not well-timed are likely to be less effective, and might contribute to the issue of behavioural fatigue.

A person might have a significant risk of contracting the disease when he is in a physical area where the disease has been transmitted in the past, or a current cluster (which is a piece of information that contact tracers might know).

It might be possible to relay this information with a physical sign, e.g. "Warning, the Coronavirus has been transmitted in this area in the past. Please socially distance and wear your mask!" or "Warning, this is a COVID-19 cluster. Please remember to maintain 2m distance and wear your mask at all times!".

This could potentially create a social norm of mask wearing in specific geographic areas.[12] Alternatively, digital prompts, like texts, could take the place of a physical sign. This seems to be a tactic that the UK government is considering; see the promoted "tweet" below.

[12] That said, there are a number of reasons for why such a system should not be established. The signs might be too jarring for tourists. They might impact businesses negatively, especially if the signs are placed in front of storefronts etc.

This system could be enhanced by an understanding of the fact that framing of information matters. For example, one academic study examined the effect of a personal or a public framing. The personal framing read "…[the] coronavirus is a serious threat to you…there are steps you can take to keep yourself safe." The public framing read "…coronavirus is a serious threat to your community…there are steps you can take to keep your community safe". The latter was more effective at increasing people's intention to engage in prevention behaviours like hand washing.[13]

Equally, we may embed prompts when residents from England cross the border into Wales. By working with telephone providers, it may be possible to send a text reminder on the safety and hygiene protocols in place in Wales for tourists who cross the border. This will ensure that non-Welsh tourists are aware of Welsh policies and know how to behave when in mid Wales.

We could also send a simple "thank you" text as English, or non-Welsh, residents are leaving Wales. Although seemingly trivial, this gesture might have a significant impact in how visitors remember their trip and in whether they make plans to return to the country. In behavioural science, the "peak-end effect" suggests that the manner in which an experience concludes (i.e. its "end") is given a significant amount of weight in how the experience is judged, generally. A text message might therefore boost a visitor's evaluation of their visit to Wales in a very cost-effective way.

Finally, we also recommend trying to make safe behaviours the default where possible. As human beings, we do not like making decisions all the time. We are more likely to accept and perform behaviours which require the least amount of effort than those where we have to make active choices and / or invest additional effort. For example, consider providing disposable masks in hotels, B&Bs and self-contained units. Similar to toiletries, if visitors find face masks available in their rooms, they are far more likely to adhere to this behaviour (they might even consider this the norm in mid Wales and comply with much more ease). Understandably, providing free disposable face masks may incur a financial cost, therefore, businesses might consider providing a free disposable face mask on the first night of stay and additional masks at a surcharge. Businesses may also consider selling face masks at their properties (e.g. at point of entry at the reception) or provide an add-on service at the time of booking to purchase face masks at a discounted price.

[13] Don't get it or don't spread it? Comparing self-interested versus pro-socially framed COVID-19 prevention messaging. Jillian Jordan et al (source)

4. Encourage locals to welcome visitors (by greeting, assisting, or socialising with them)

What behaviour?	Local communities perform welcoming behaviours, e.g. smile when interacting with visitors, say hello and have a brief conversation
Where does the behaviour occur?	Online (when booking accommodation and experiences) Local shops (e.g. farmer's markets) Local attractions (e.g. Powis Castle) Experiences (e.g. boat-trips)
Who is involved in performing the behaviour?	Tourists to mid Wales

Analysis

Safety precautions. Many areas in the mid Wales region are currently coronavirus free or have a significantly low number of cases. These Welsh locals may not feel comfortable welcoming visitors to their communities as they may be fearful of contracting the virus. They may see the outsiders as potential carriers of COVID-19, as health risks. This idea is supported by the survey results. Of those who took the communities version, 31% strongly agreed and 27% agreed with the statement "I am fearful of interacting with tourists once lockdown restrictions are lifted".

On the other hand, locals may think that interacting with visitors in the outdoors or while engaging in safe behaviours mitigates this risk sufficiently. In some cases, however, engaging in safe behaviours might be at odds with giving visitors a warm welcome. For instance, although wearing a mask is important for public health reasons, it might make the wearer less friendly and/or be perceived as less friendly by others.

Knowledge. Locals may not be aware or convinced of the importance of greeting visitors. They may not see the impact that these small gestures have on the Welsh tourism sector, e.g. they may not be aware of the fact that visitors are more likely to return to the country if they have felt a connection with the local population. Or, they may not see their behaviour play an important part in their community's overall treatment of visitors.

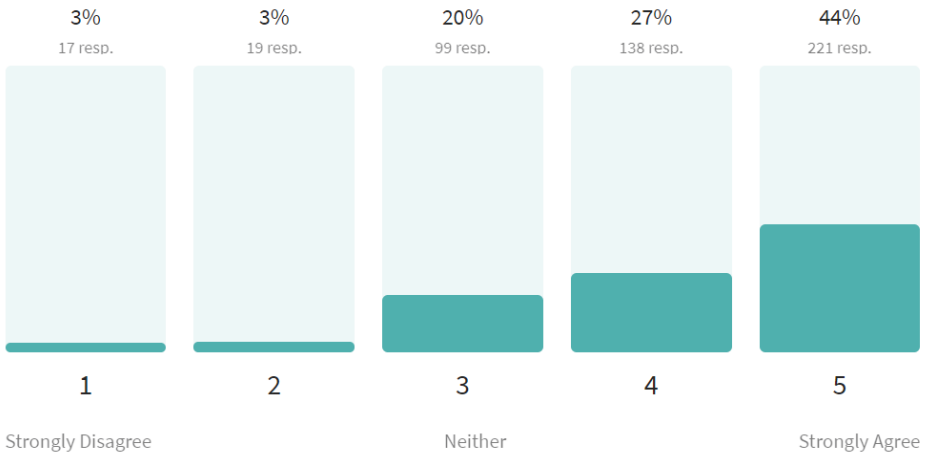
Situational factors. There are a wide range of situational factors that might prevent locals from welcoming visitors. For instance, locals may interact with visitors only in a transactional context (e.g. serving visitors food at a restaurant, checking visitors into a hotel, etc.) This may make an attempt at a more personal connection seem inauthentic.

Alternatively, locals may come across visitors in different situations, e.g. on the street or in a park, but may lack a prompt or reason to engage in the interaction. These sentiments are summed up by one survey respondent who lamented that he had "[n]ot received a very welcoming welcome from the locals other than those who have tourism-based business". Part of the issue might be that locals may have had negative, past experiences with visitors (e.g. littering or parking), which influences their perception and behaviour towards visitors. Many of the comments left by locals were negative, such as "The main issue for the people I know here, is not that we do not wish for tourists, but the behaviour of the tourists when they are here . . ." and "I am appalled at the lack of respect the tourist are showing the residents in Llanrhaeadr Ym". Yet, the graph below shows that, at least to some extent, locals report remembering positive past experiences when they are interacting with tourists.

When interacting with tourists, I remember the good experiences I have previously had

494 out of 607 answered

4.1 Average rating



Barriers:

1. Locals are fearful of the risks that tourists pose
2. Locals are not aware or convinced of the need to perform welcoming behaviours
3. Locals may not see their behaviour as part of their community's behaviour
4. Locals may engage visitors in settings not conducive to authentic connection
5. Locals may lack a prompt or reason to engage in interaction with visitors

6. Locals may have had negative past experiences with visitors

Diagnosis

What needs to change? Social opportunity

Objectives

1. Locals could be rated as welcoming, helpful, friendly, etc. according to visitor surveys

Interventions

A lot of social interaction between locals and visitors occurs in commercial settings, with the locals serving visitors in some capacity. In such contexts, personal (and unexpected) touches can go a long way. Consider one experiment that varied customer service in a restaurant.[14] In a "control" condition, a waitress delivered a bill to clients when they were finished eating. In the first "treatment" condition, she gave a piece of chocolate to each customer with the bill. In the second treatment condition, she gave two pieces of chocolate with the bill. And in the third condition, she gave one piece of chocolate with the bill, and as she was leaving the table, stopped and offered each person a second piece (which was likely seen as a personal gift, the authors contend). The "dependent variable" in the experiment was her average tip; it was 18%, 19%, 21%, and 22% in each condition, respectively.

One way to engineer positive interactions between the local community and visitors would be to steer visitors to businesses that are known to have friendly employees and away from businesses that are known to have unfriendly employees. Moreover, MWT could, in fact, be in a position to perform this function, if it has collected feedback on its 600+ members[15] (or could use information on websites like Google Reviews, TripAdvisor, Yelp, if it hasn't). A potential visitor looking on the Visit Mid Wales website for accommodation in Aberystwyth, for example, could see an asterisk next to the name of some places, and the message "Very Friendly Staff." Alternatively, the website might choose to highlight certain businesses on its main page because of this attribute. This would also serve to incentivise businesses to educate their staff on being more welcoming and friendly to tourists (for example, businesses with the best "friendly" score might receive recognition of some sort).

[14] Sweetening the Till: The Use of Candy to Increase Restaurant Tipping source
[15] MWT website source

Finally, MWT might consider creating community panels so local communities feel like their voice is being heard and concerns are being addressed. Panels could be created using an interview system, a nomination system, or an election system. These panels could be converted into advocates to cascade messages into their communities. They could serve as a strong sounding board for future MWT work and support MWT in creating harmony amongst business and communities.

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