



ALVA Attractions Recovery Tracker

Wave 8

Fieldwork: 21-27 April 2021

ALVA



The challenge for 2021

Understanding how to build **TRUST** and **CONFIDENCE** among the attractions-visiting public

-that we are still safe places to visit
-that we are still able to deliver the same (or better) full, rich and engaging visit experiences

What differences are we likely to see when re-opening this time around?

- What implications do these have for how we physically present ourselves?
- What implications do these have for how we communicate with audiences and visitors?
- What implications do these have for budget planning?



How have we been generating insights?

Periodic waves of online research among representative samples of the attractions-visiting public:

“UK adults who visited at least one attraction in the UK in 2019”

	2020 Waves	Sample	Boosts	Prompted by.....
1	20-24 April	668 from UK	-	First lockdown
2	13-18 May	919 from UK	Wales	Initial lockdown easing England (13 May)
3	9-12 June	1,065 from UK	Scotland	England gardens open (1 Jun), zoos / shops (15 Jun)
4	8-11 July	716 from UK	-	England indoor attns / hospitality open (4 Jul)
5	26 Aug-2 Sep	720 (Lon & Scot only)	-	End of school holidays / Eat Out to Help Out

Wave 6: 26-31 January

**869
survey
responses**

London
c.200

Scot.
c.100

Wave 7: 3-9 March

**1,090
survey
responses**

London
c.200

Scot.
c.300

Lockdown easing announcement (22 Feb)

Wave 8: 21-27 April

**1,066
survey
responses**

London
c.200

Scot.
c.300

Open shops / outdoor attns. in Eng. (12 Apr)

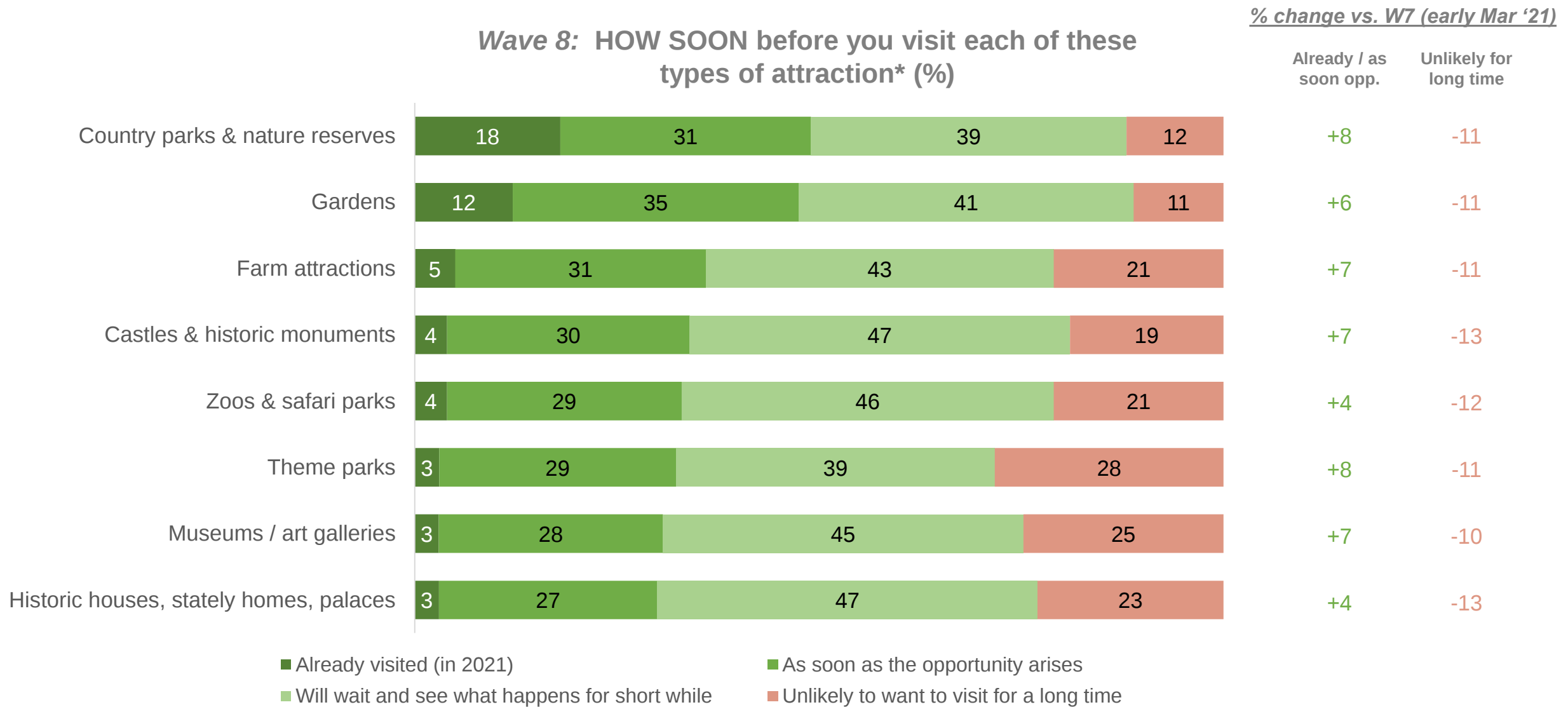
The background image shows the front of the British Museum in London, featuring its iconic neoclassical architecture with a large portico of columns. In the foreground, two black London taxis are parked on a street, and a person is riding a bicycle past them. A large blue rounded rectangle is overlaid on the right side of the image, containing white text.

How is the public feeling
about visiting attractions?

ALVA

decision
house

Since early March, there has been a further very strong positive shift in appetite for visiting attractions when they re-open. In particular, much of the large 'stubbornly cautious' segment are now at least beginning to consider visiting

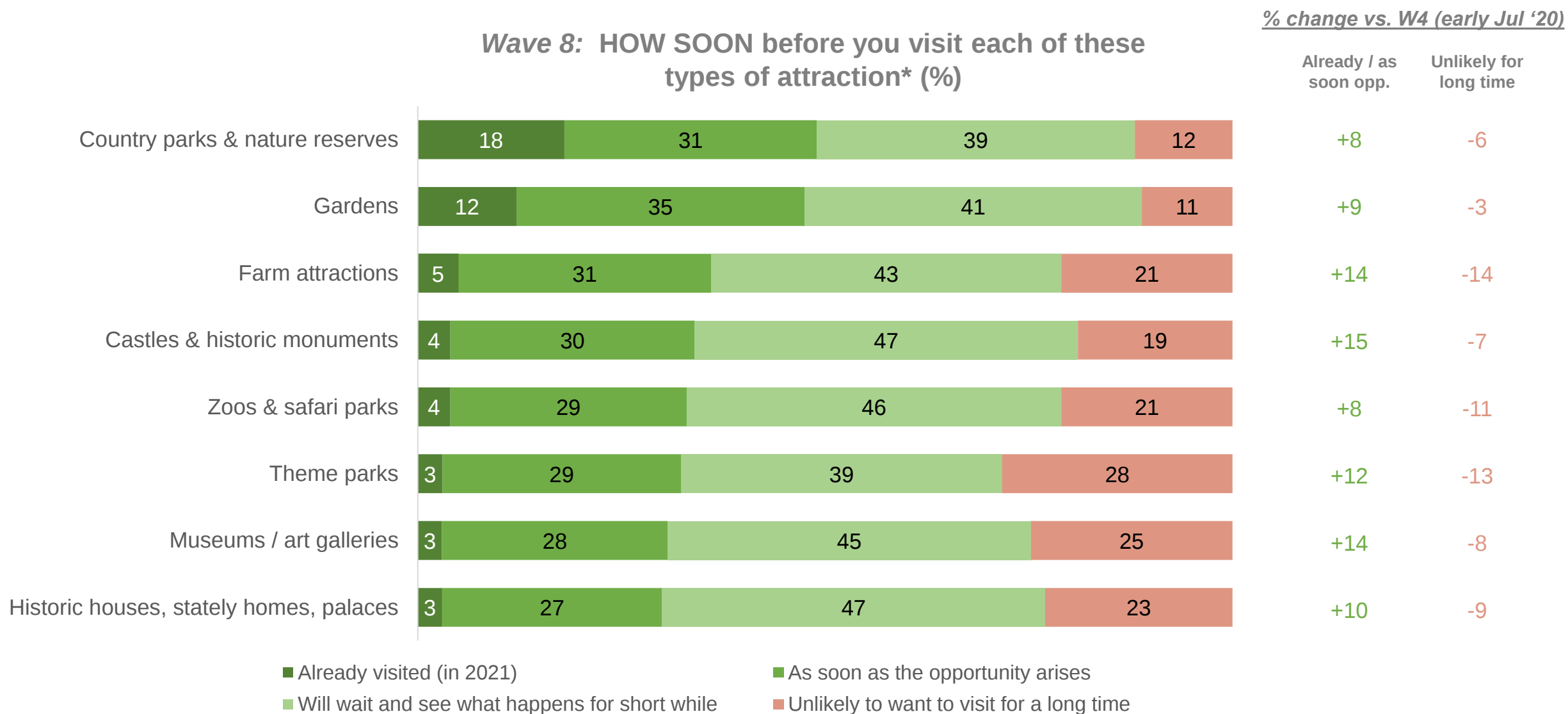


*those yet to receive the vaccine were asked to assume that they would not have received the vaccine at the point of re-opening (39% at Wave 8)

Q: How soon do you think it would be before you visit each of these types of attraction after they re-open?

Bases: All who tend to visit this type of attraction – Wave 8

The appetite for visiting is now way higher than at the point when indoor attractions re-opened in 2020

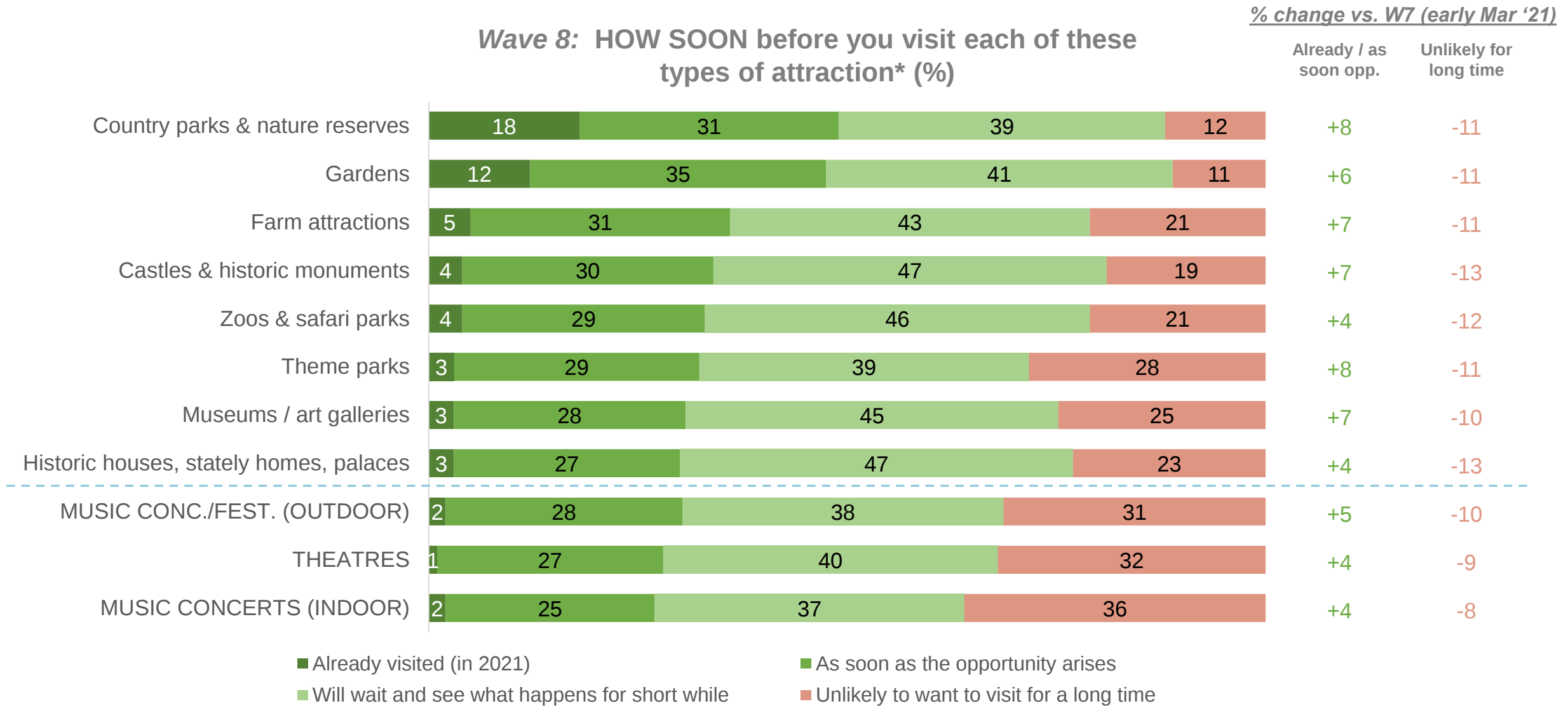


*those yet to receive the vaccine were asked to assume that they would not have received the vaccine at the point of re-opening (39% at Wave 8)

Q: How soon do you think it would be before you visit each of these types of attraction after they re-open?

Bases: All who tend to visit this type of attraction – Wave 8

Although remaining at lower levels than attractions, appetite for visiting theatres and concert venues is also growing – albeit at a slightly slower rate



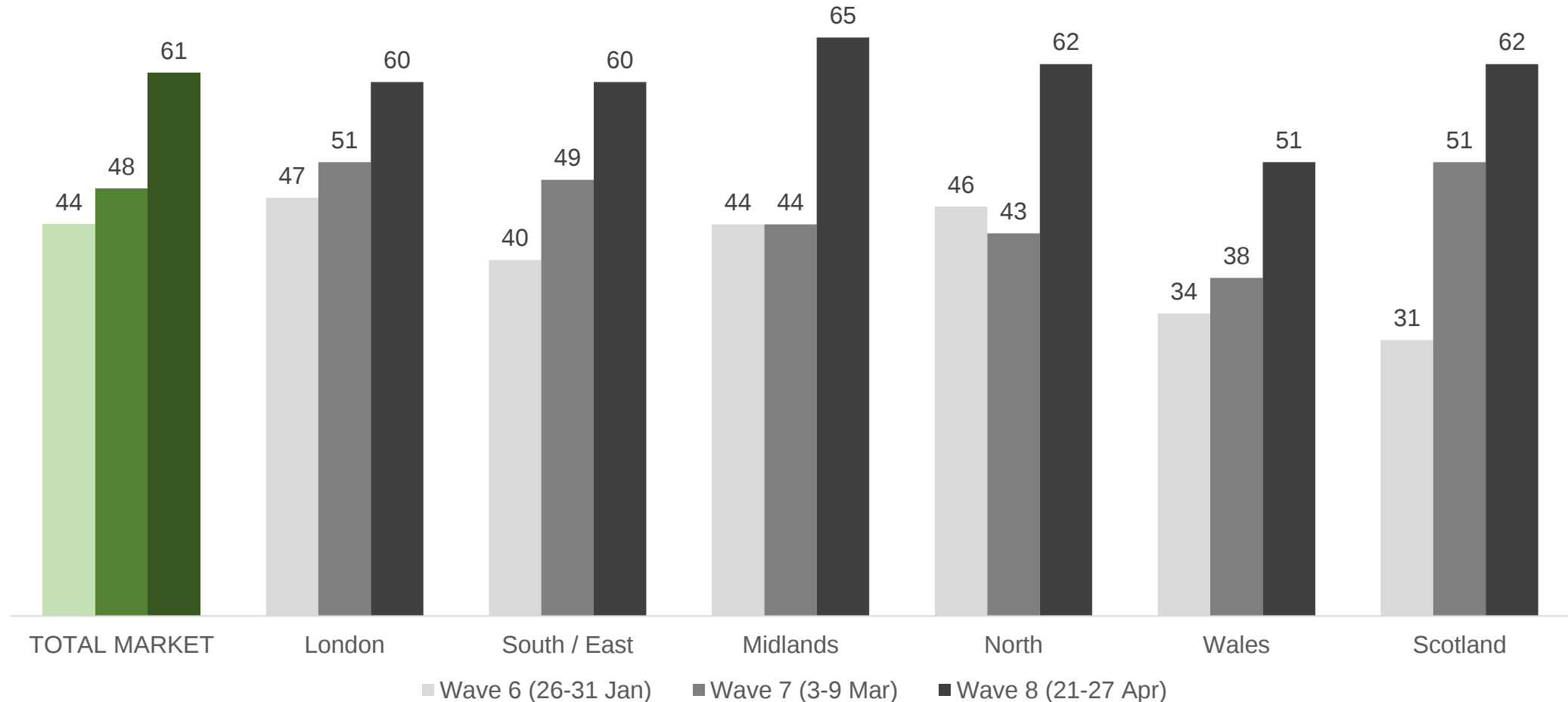
*those yet to receive the vaccine were asked to assume that they would not have received the vaccine at the point of re-opening (39% at Wave 8)

Q: How soon do you think it would be before you visit each of these types of attraction after they re-open?

Bases: All who tend to visit this type of attraction – Wave 8

After lagging behind in early March, appetite for visiting among those living in the Midlands and North of England has now caught up with the rest of the UK

*Any 'I have already visited in 2021' or will 'as soon as opportunity arises' (%)**



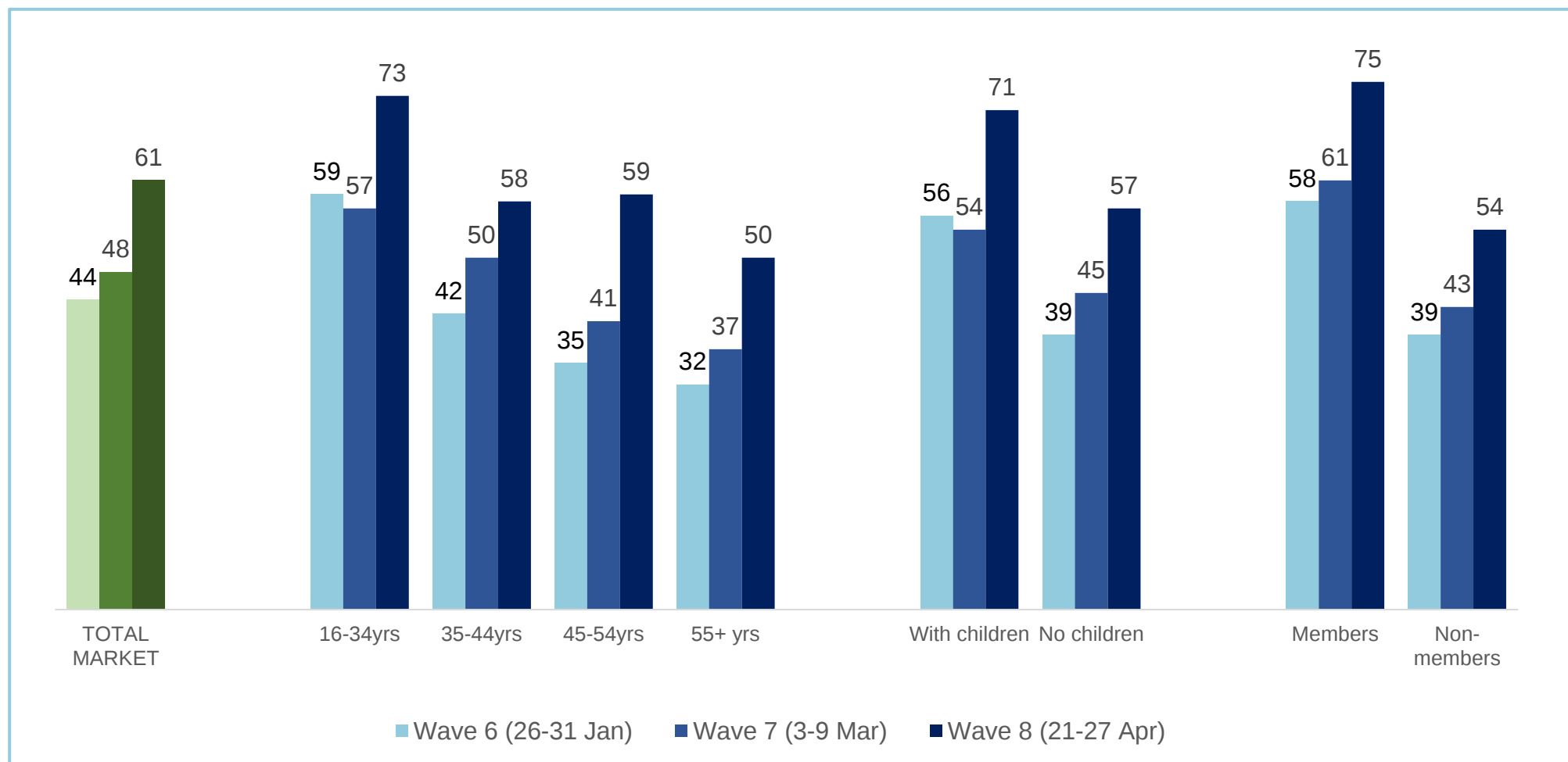
**those yet to receive the vaccine were asked to assume that they would not have received the vaccine at the point of re-opening (39% at Wave 8)*

Q: How soon do you think it would be before you visit each of these types of attraction after they re-open?

Base: All respondents (Wave 6: 869, Wave 7: 1,090, Wave 8: 1,066)

Although still lower among those aged 55 or over, visit appetite has grown significantly across all age groups since early March

Any 'I have already visited in 2021' or will 'as soon as opportunity arises' (%)*



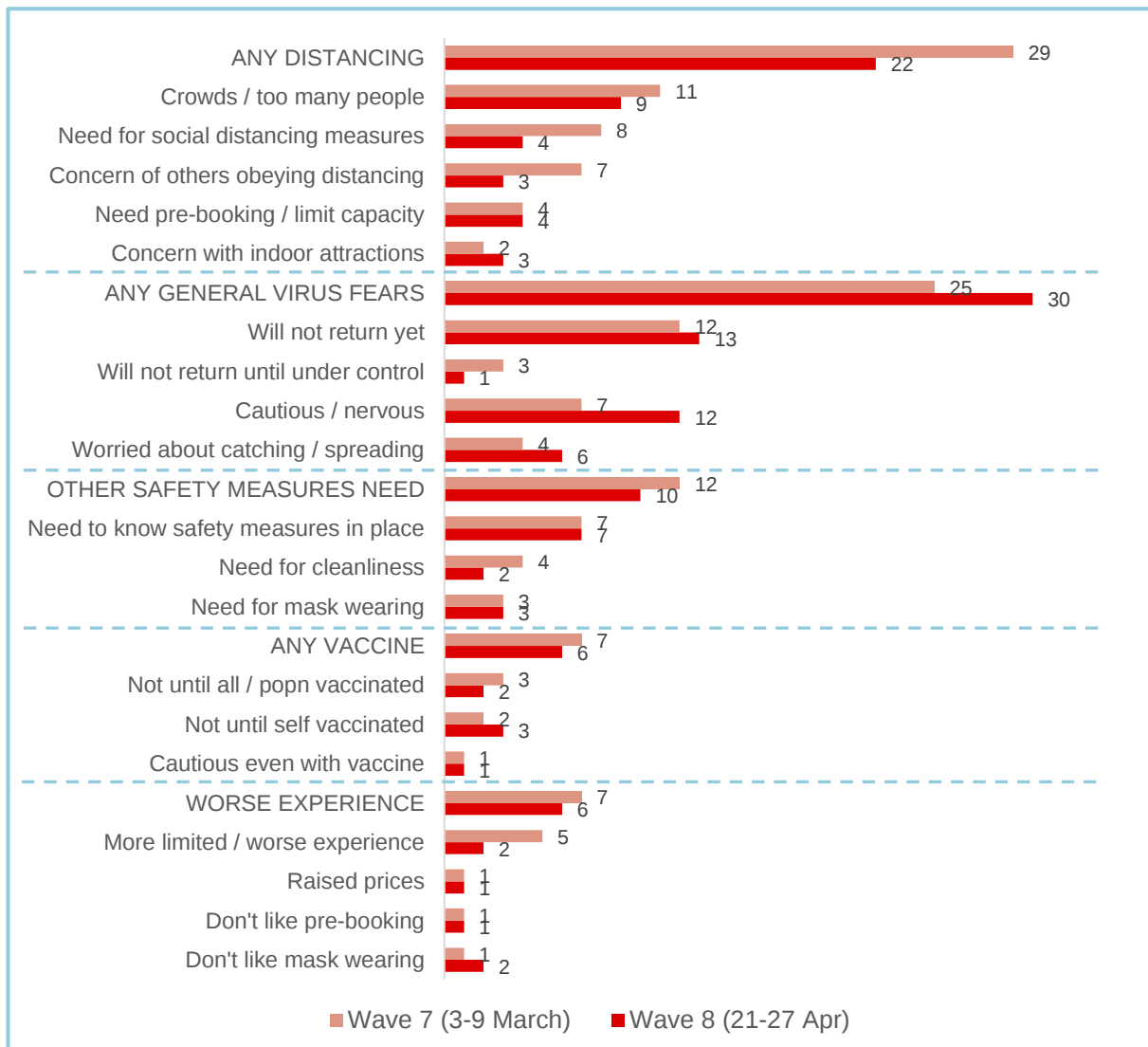
*those yet to receive the vaccine were asked to assume that they would not have received the vaccine at the point of re-opening (39% at Wave 8)

Q: How soon do you think it would be before you visit each of these types of attraction after they re-open?

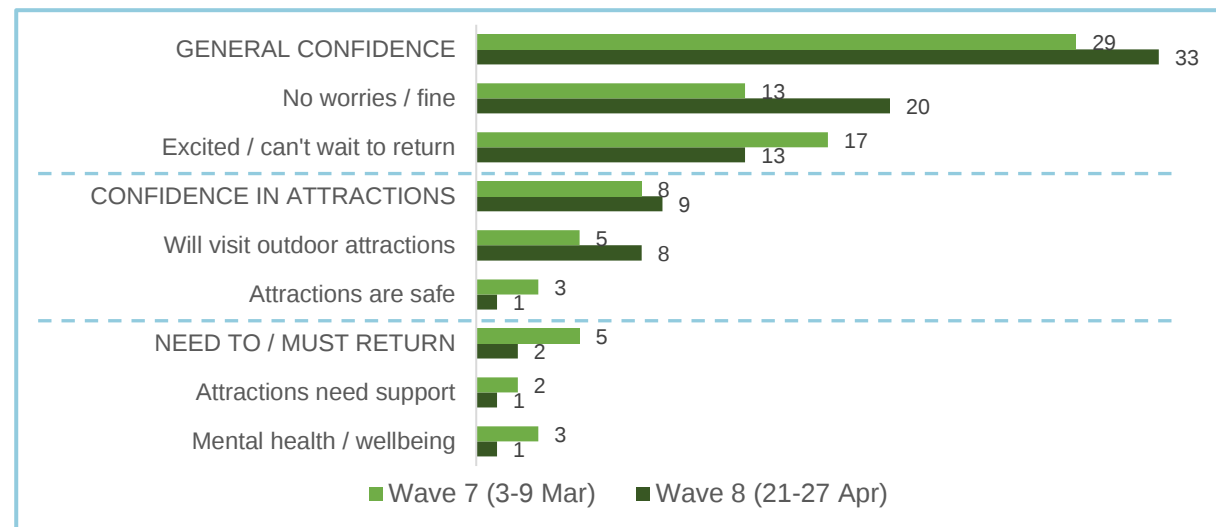
Base: All respondents (Wave 6: 869, Wave 7: 1,090, Wave 8: 1,066)

There is no doubt that anxieties around returning are easing for many, but two-thirds still express some fear or concerns as visits move closer to reality

64% expressed fear or concerns about visiting
(73% at end Jan, 66% in early Mar)



43% expressed confidence / desire to return
(26% at Wave 6 – end Jan, 40% in early Mar)

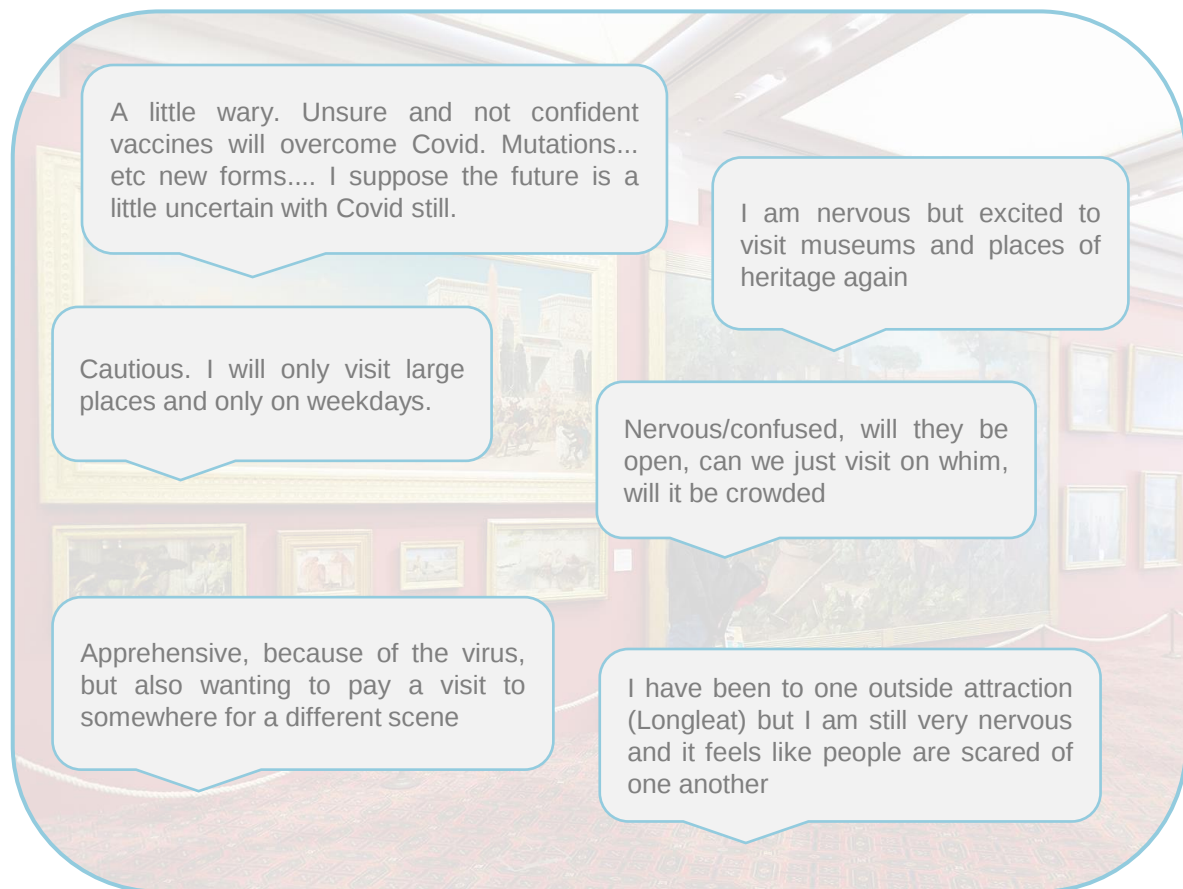


Q: Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public.

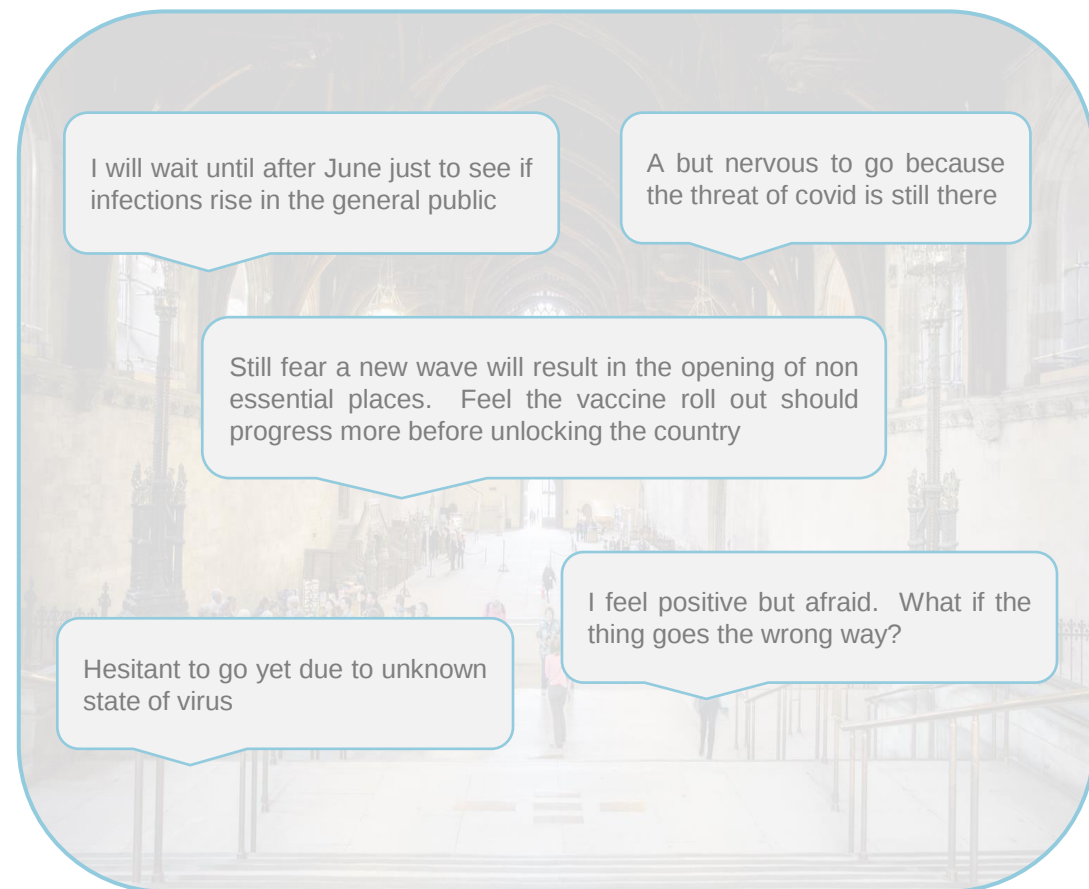
Bases: All respondents (Wave 6 – main sample, 694, Wave 7 – main sample, 687, Wave 8 – main sample, 708)

There is a lingering caution and nervousness about returning, driven by ongoing general fears about the virus

Cautious / nervous (12%)



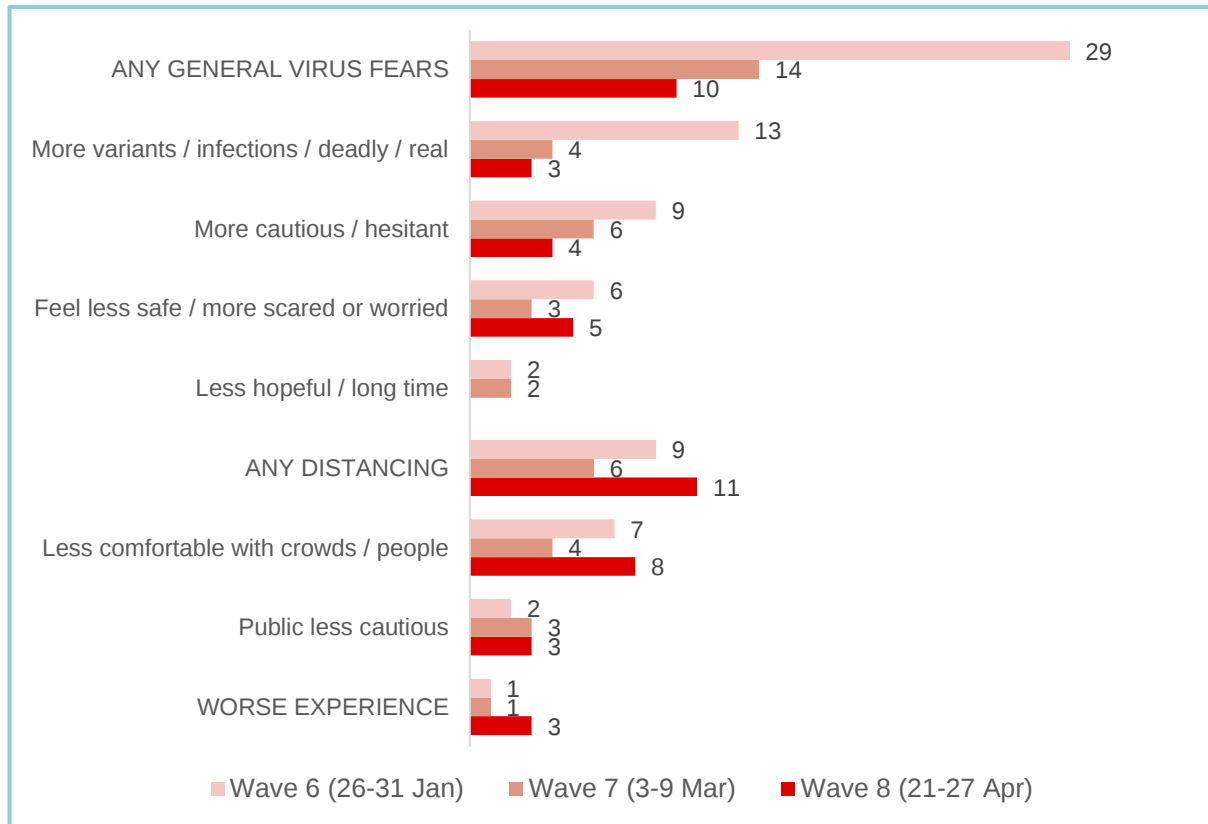
Worried about catching / spreading (6%)



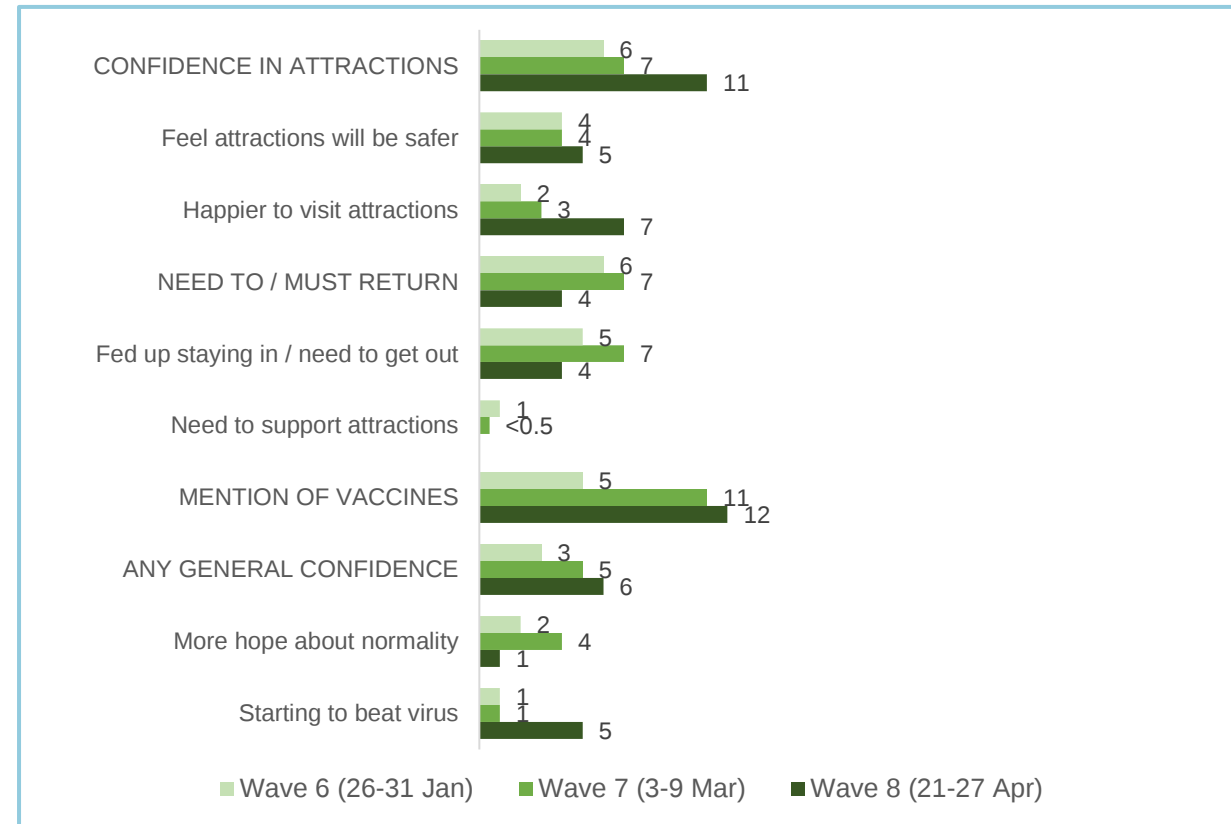
As we saw in early March, vaccines and associated falling infection rates have been the game changers in driving confidence. However, a fear of crowds has become ingrained for many

How feel DIFFERENTLY about prospect of visiting attractions, compared with first lockdown in April to June last year

25% feel LESS positive about prospect of visiting attractions than in first lockdown
(39% at end Jan, 22% in early Mar)

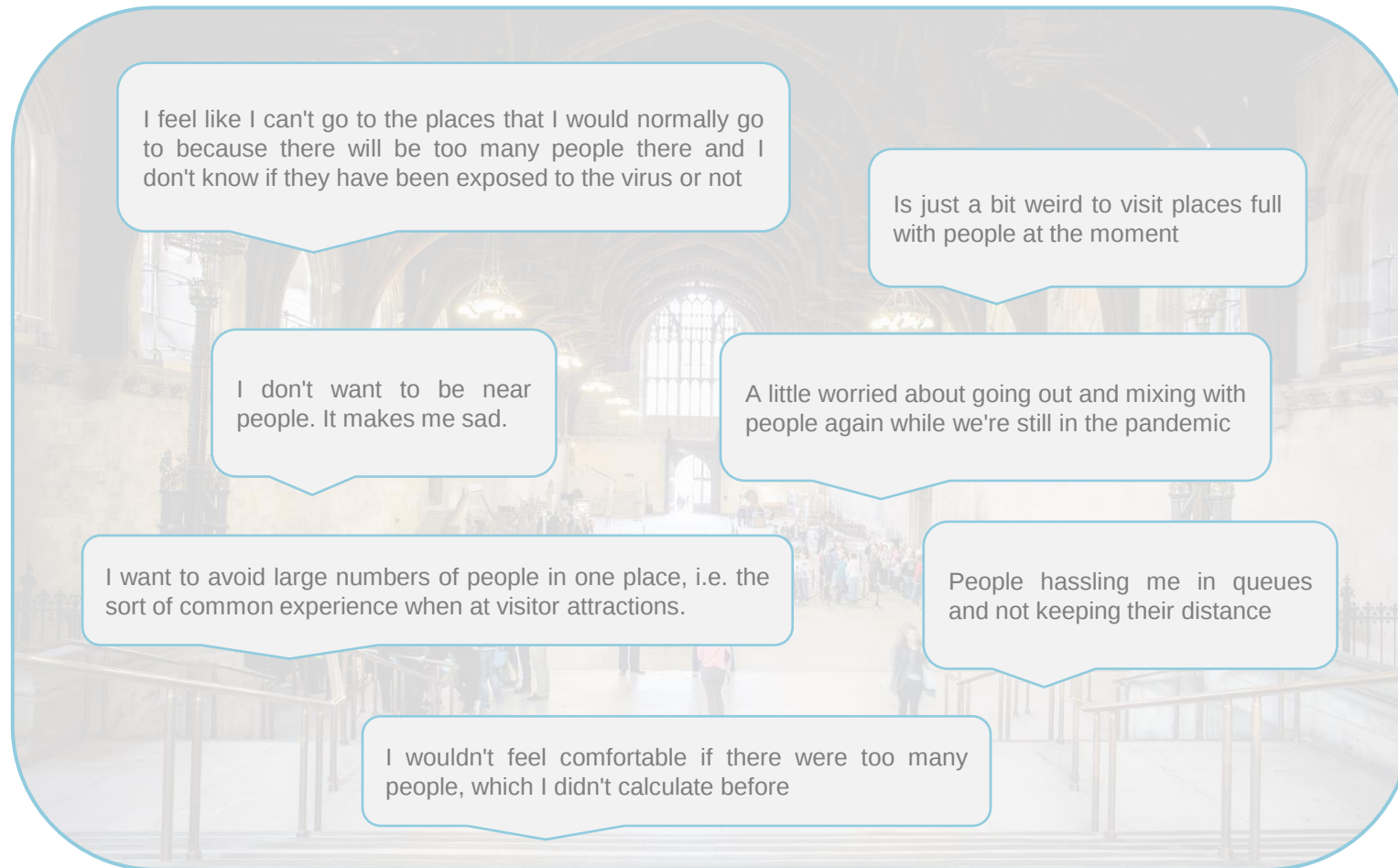


31% feel MORE positive about prospect of visiting attractions than in first lockdown
(18% at end Jan, 29% in early Mar)



A notable proportion of the population has become conditioned to fear being in environments with other people around them

8% mentioned feeling less comfortable with crowds / people when asked what is different now compared with first lockdown



Q: Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties?

Q: In what ways do you currently feel differently about the prospects of visiting attractions, compared with how you felt during the first lockdown in April to June last year?

Bases: All respondents Wave 8 – main sample (708)

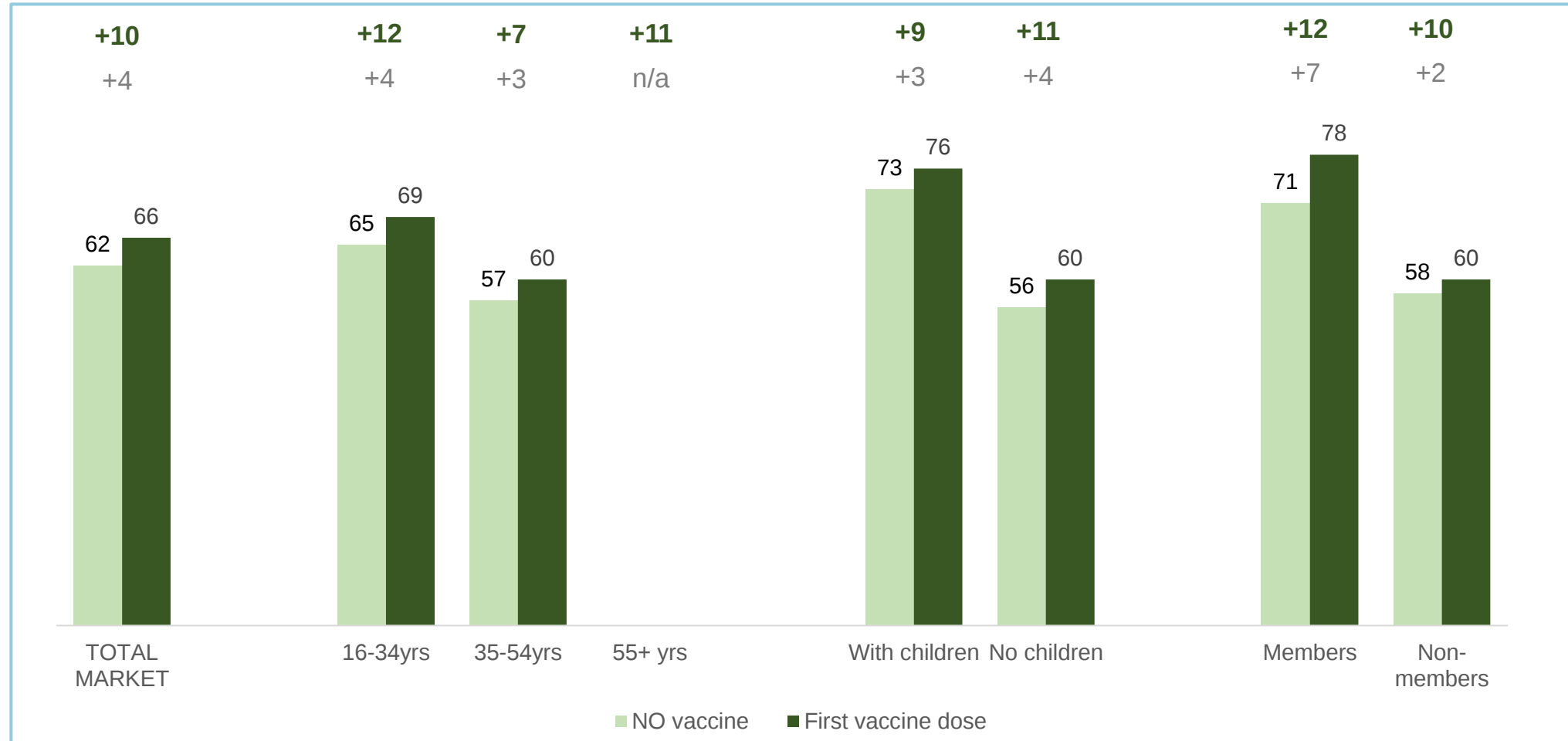
Now that we are vaccinating younger age groups who were already more confident about visiting, it is not surprising that the impact of the vaccine on visit confidence has dropped since early March

Vaccine Impact

Wave 8: Any 'I have already visited in 2021' or 'as soon as opportunity arises' (%)

Wave 7:

Wave 8:



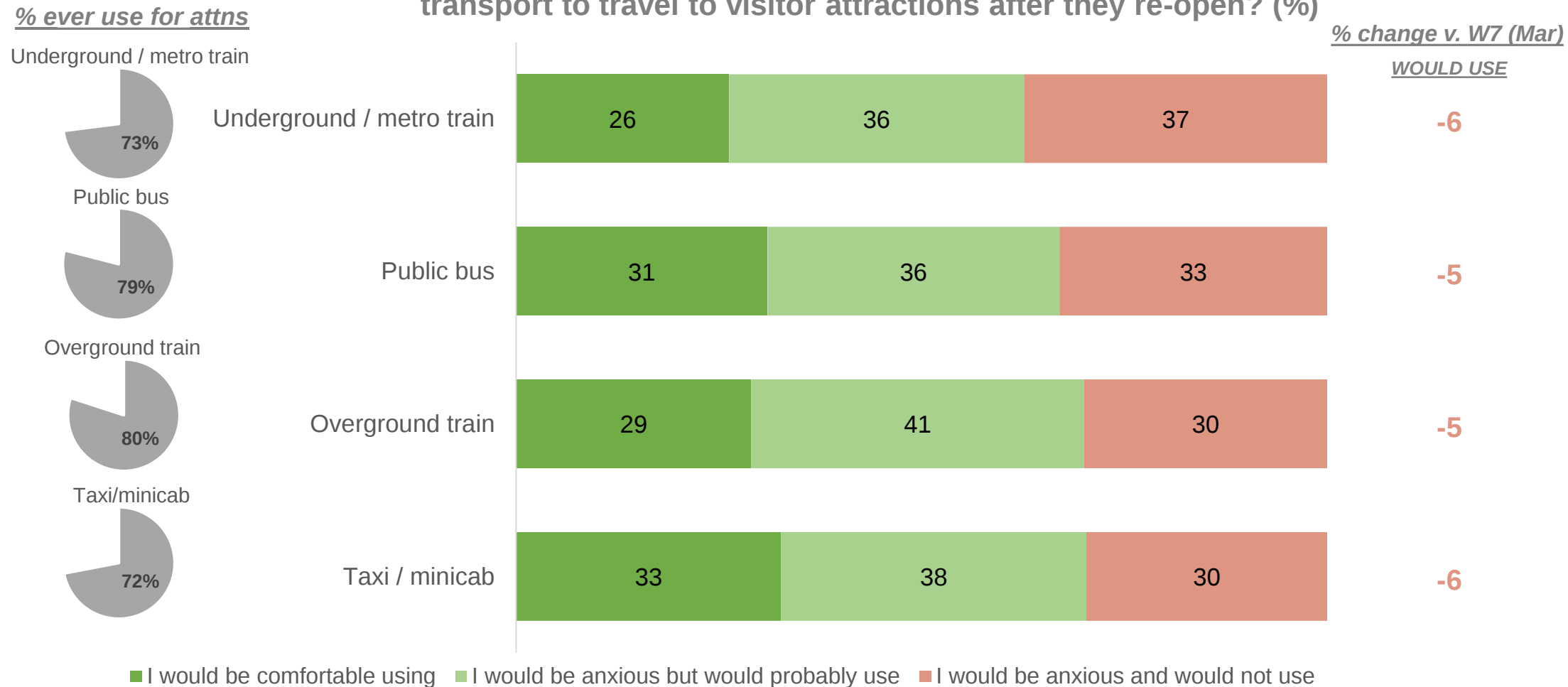
Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open?

Q: Assuming you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open?

Base: All respondents yet to have the first vaccine dose (Wave 8: 286)

National confidence around use of public transport to visit attractions has slipped back a little since early March – perhaps perceptions of increased ‘crowds’?

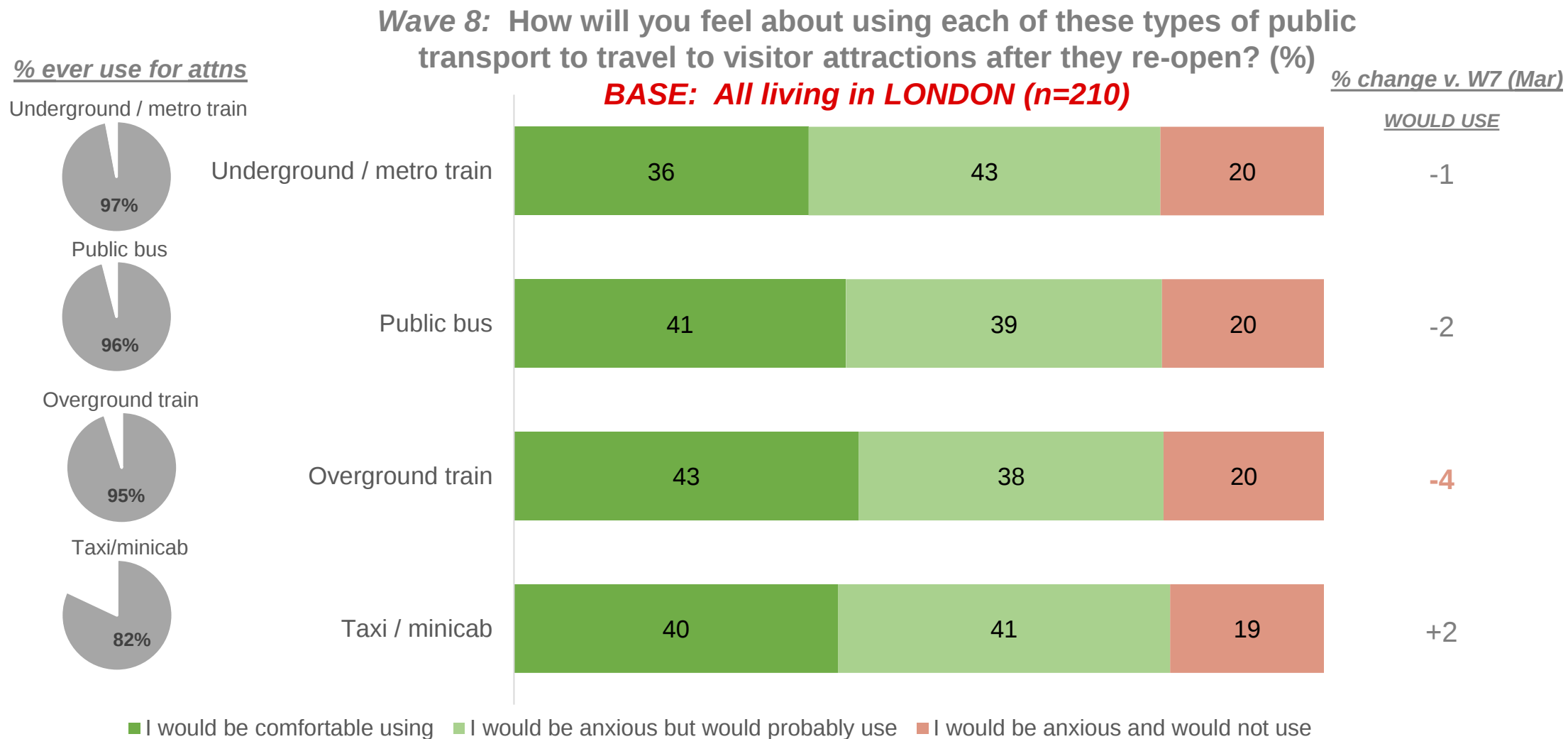
Wave 8: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)



Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open?

Base: All who ever use each form of transport to travel to visitor attractions, Wave 8

Among Londoners, confidence has not slipped back as much as nationally

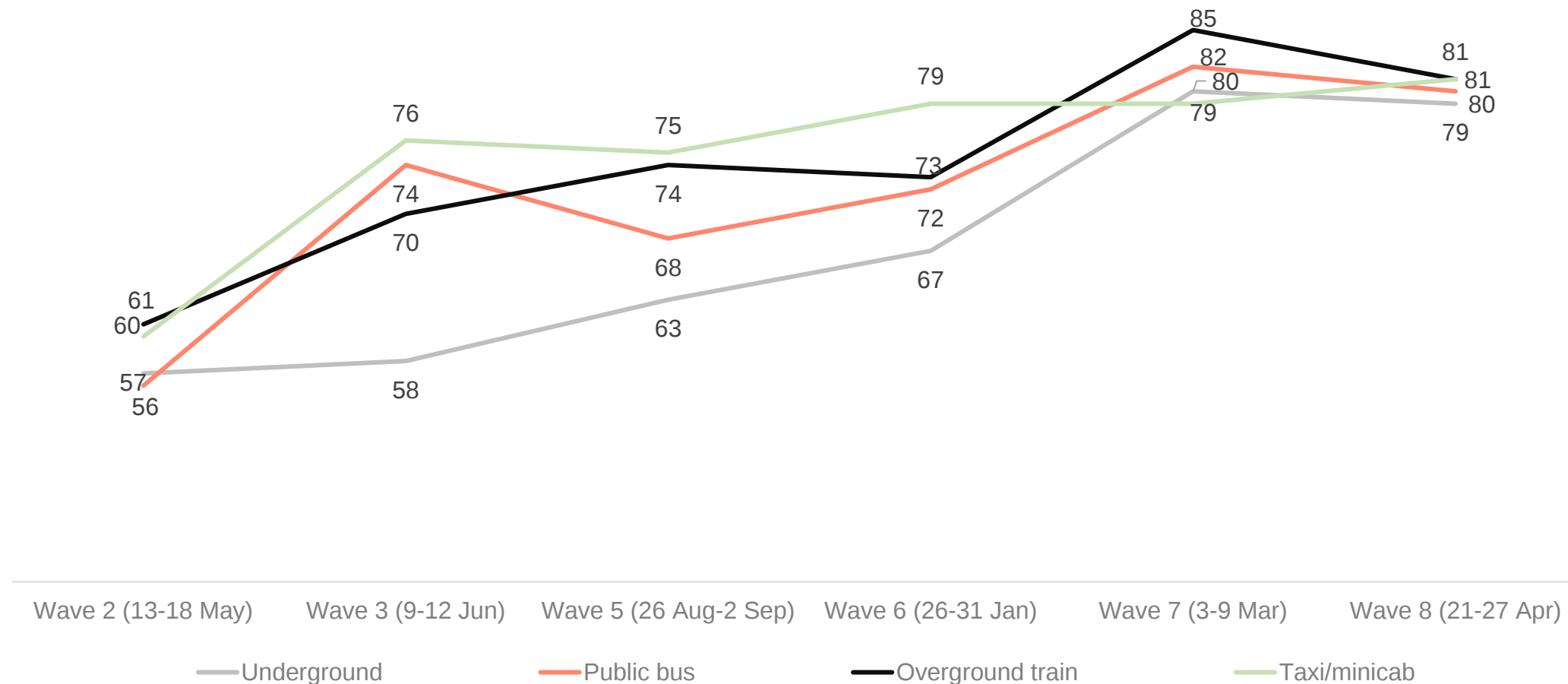


Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open?

Base: All LONDONERS who ever use each form of transport to travel to visitor attractions, Wave 8

80% of the attractions-visiting public in London would now use public transport to visit attractions

Would be comfortable using / would be anxious but would probably use to visit attractions (%)
BASE: All living in LONDON



Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open?

Base: All LONDONERS who ever use each form of transport to travel to visitor attractions



How can we build trust and confidence in visiting?

What should we do?

What should we say?

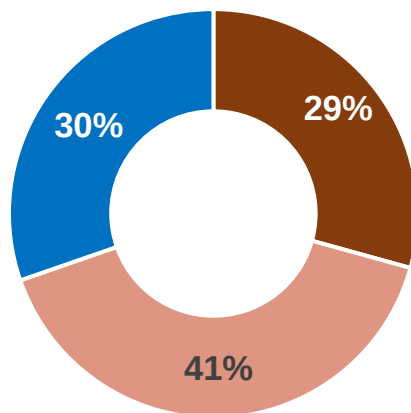
ALVA

decision
house

Once vaccines have been fully rolled out to the population, there is notable support for some form of 'proof of vaccination / exemption', especially for indoor venues

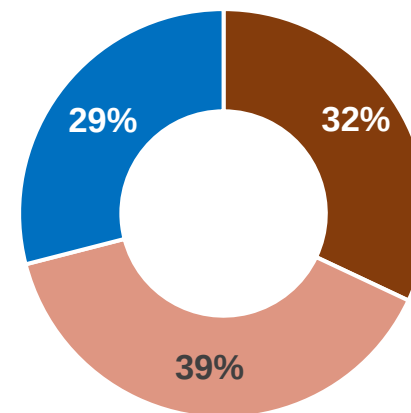
Wave 8: Preference for use of 'proof of vaccination' to gain entry to attractions (%)

Indoor attractions

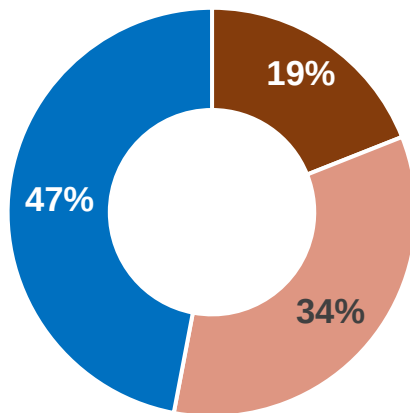


- All visitors provide vaccine proof
- All visitors provide vaccine proof or exemption
- Vaccine proof NOT made a condition

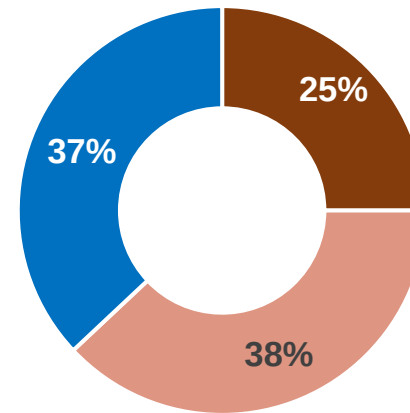
Indoor events e.g. concerts, talks



Outdoor attractions



Outdoor events e.g. concerts, festivals

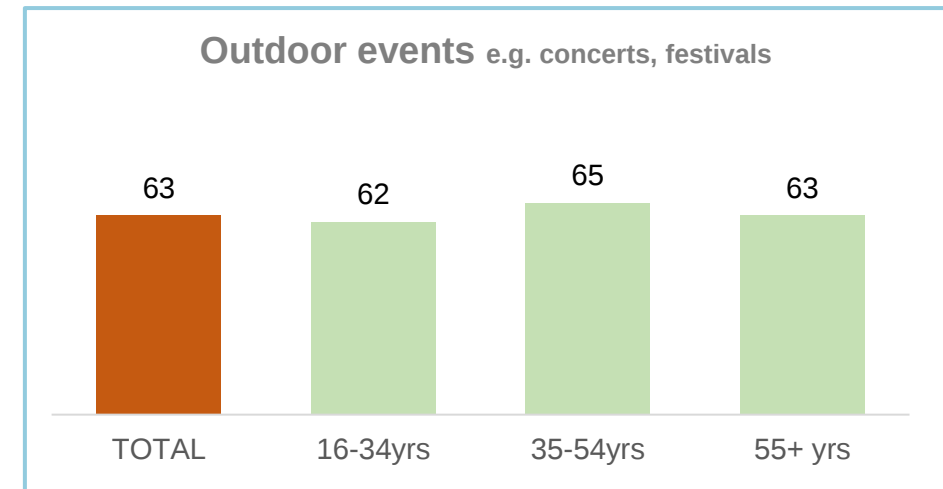
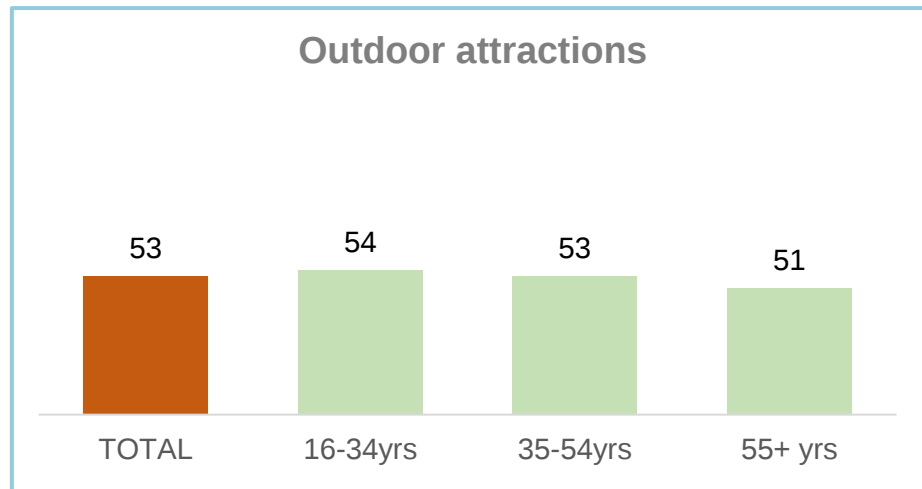
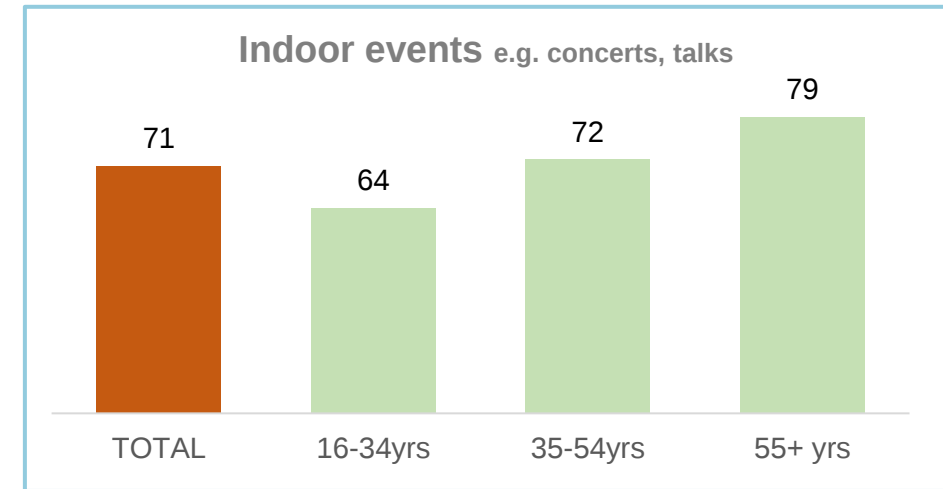
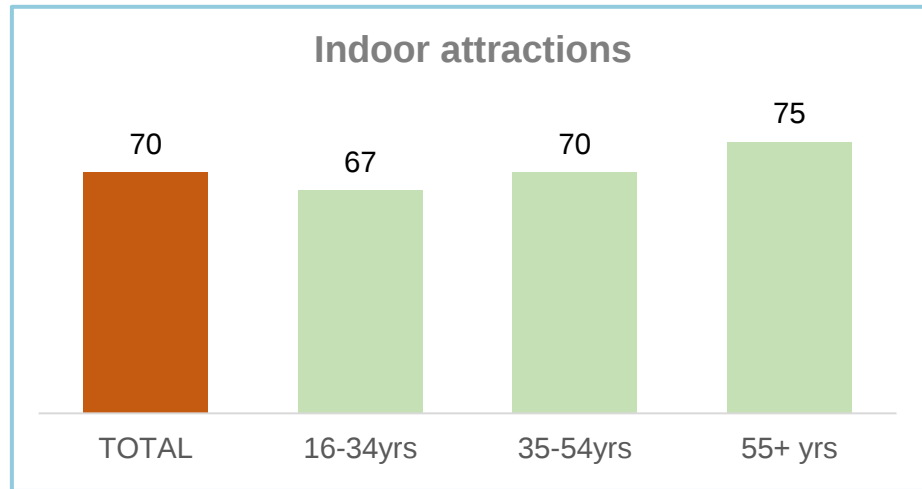


Q: Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes your attitude towards using some form of proof of vaccination to gain entry to.....

Base: All respondents who tend to go to this type of experience, Wave 8

The key driver of whether someone prefers 'proof of vaccination / exemption' is age – although there is still a majority of younger adults who would be in favour

Wave 8: Who would prefer 'proof of vaccination / exemption' to gain entry? (%)

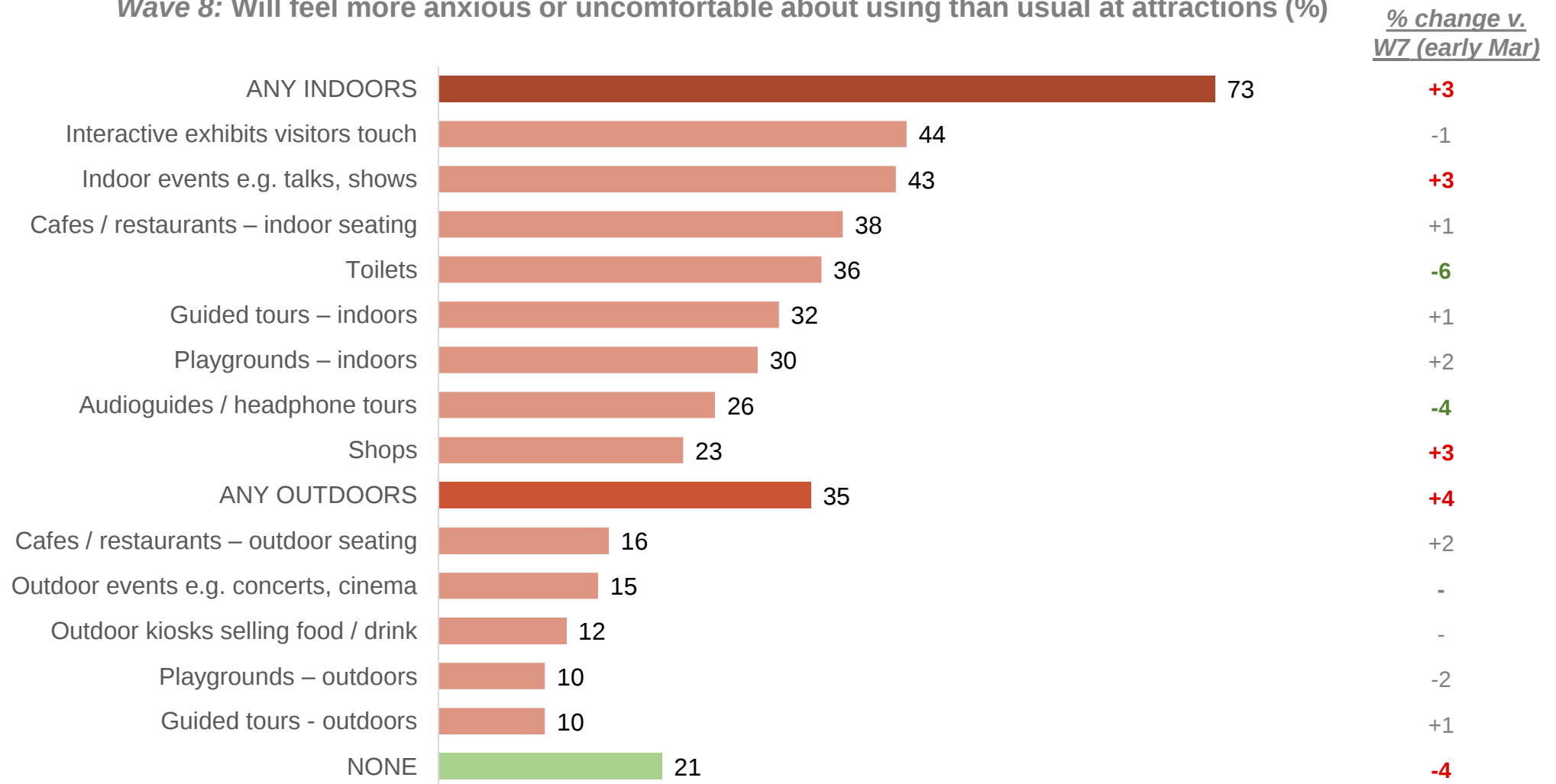


Q: Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes your attitude towards using some form of proof of vaccination to gain entry to.....

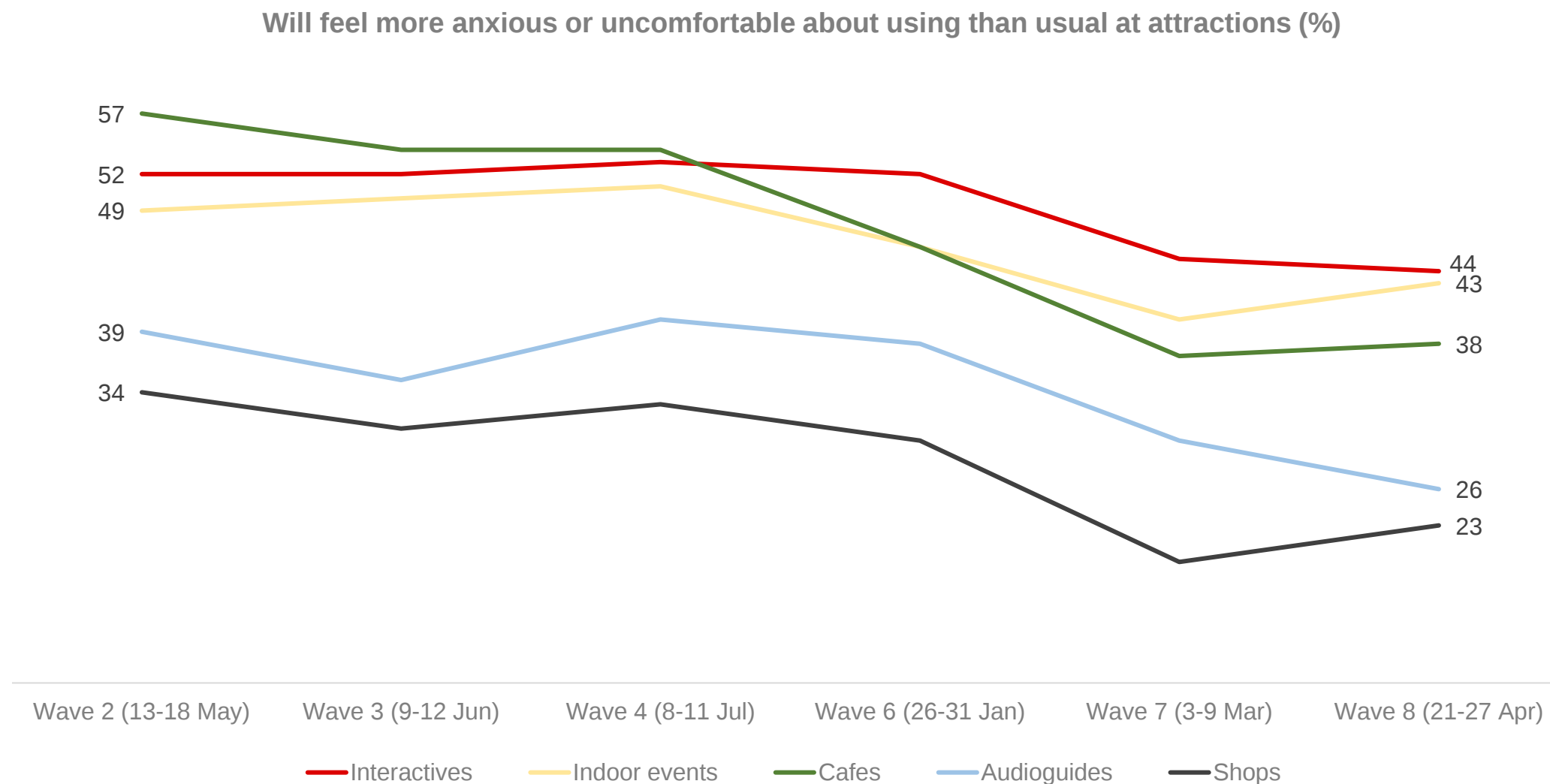
Base: All respondents who tend to go to this type of experience, Wave 8

After February's significant drop in anxiety around using indoor attraction facilities after re-opening, this anxiety has not decreased any further in March / April

Wave 8: Will feel more anxious or uncomfortable about using than usual at attractions (%)



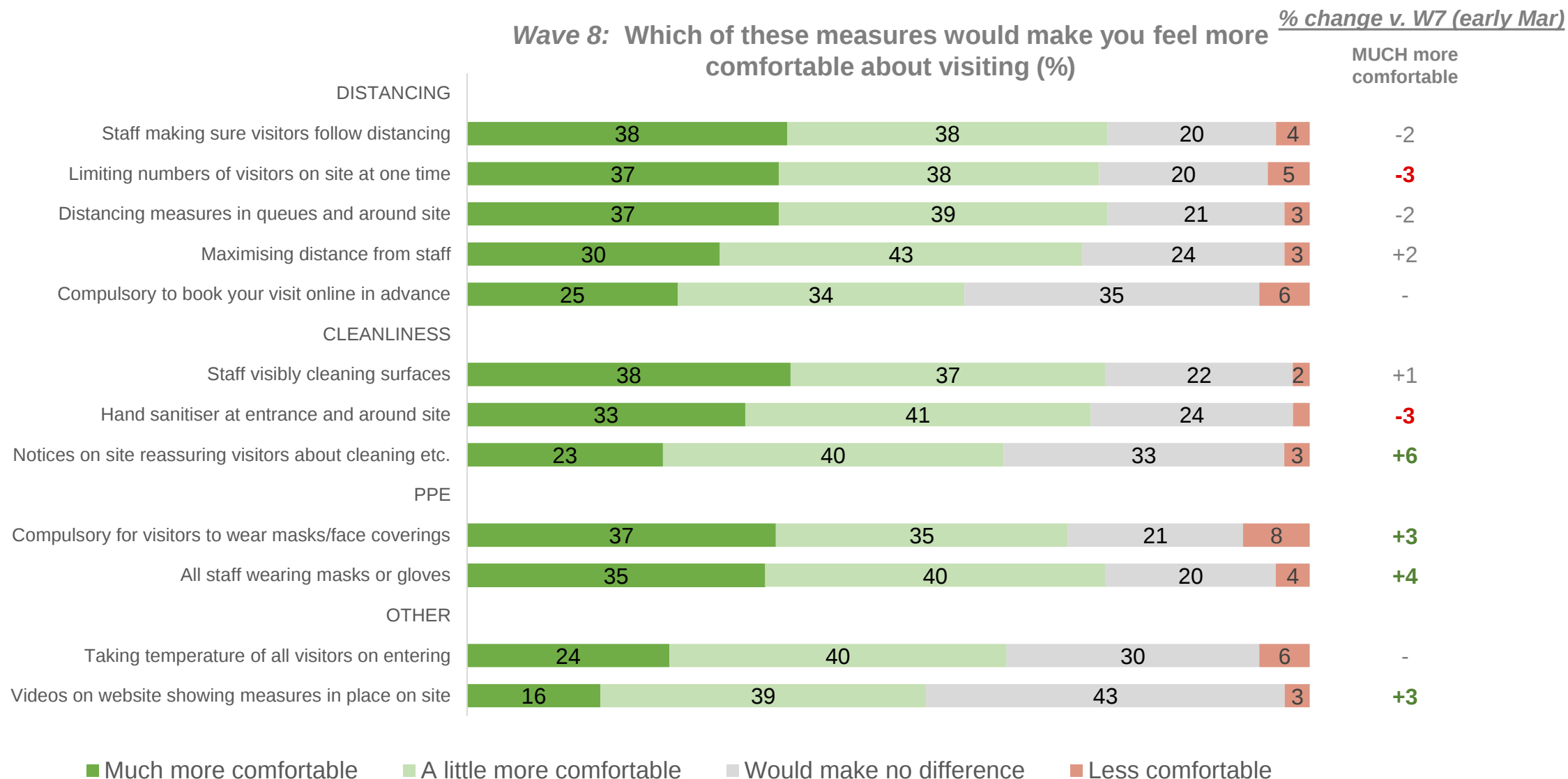
As the reality of visiting gets closer, improvements in anxiety have stalled with facilities where distancing is potentially an issue



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

Base: All respondents

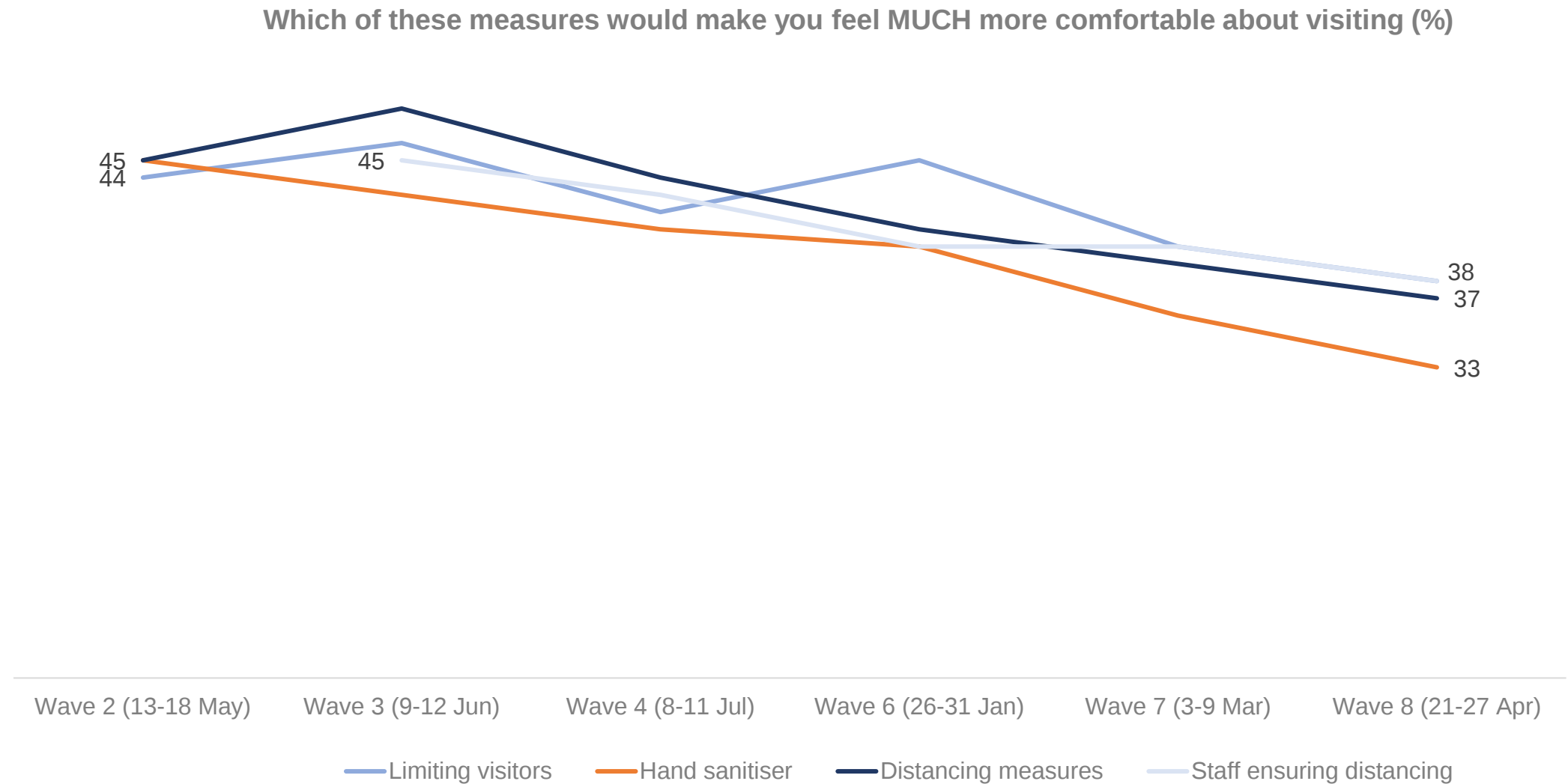
Most safety measures will still be highly comforting to visitors



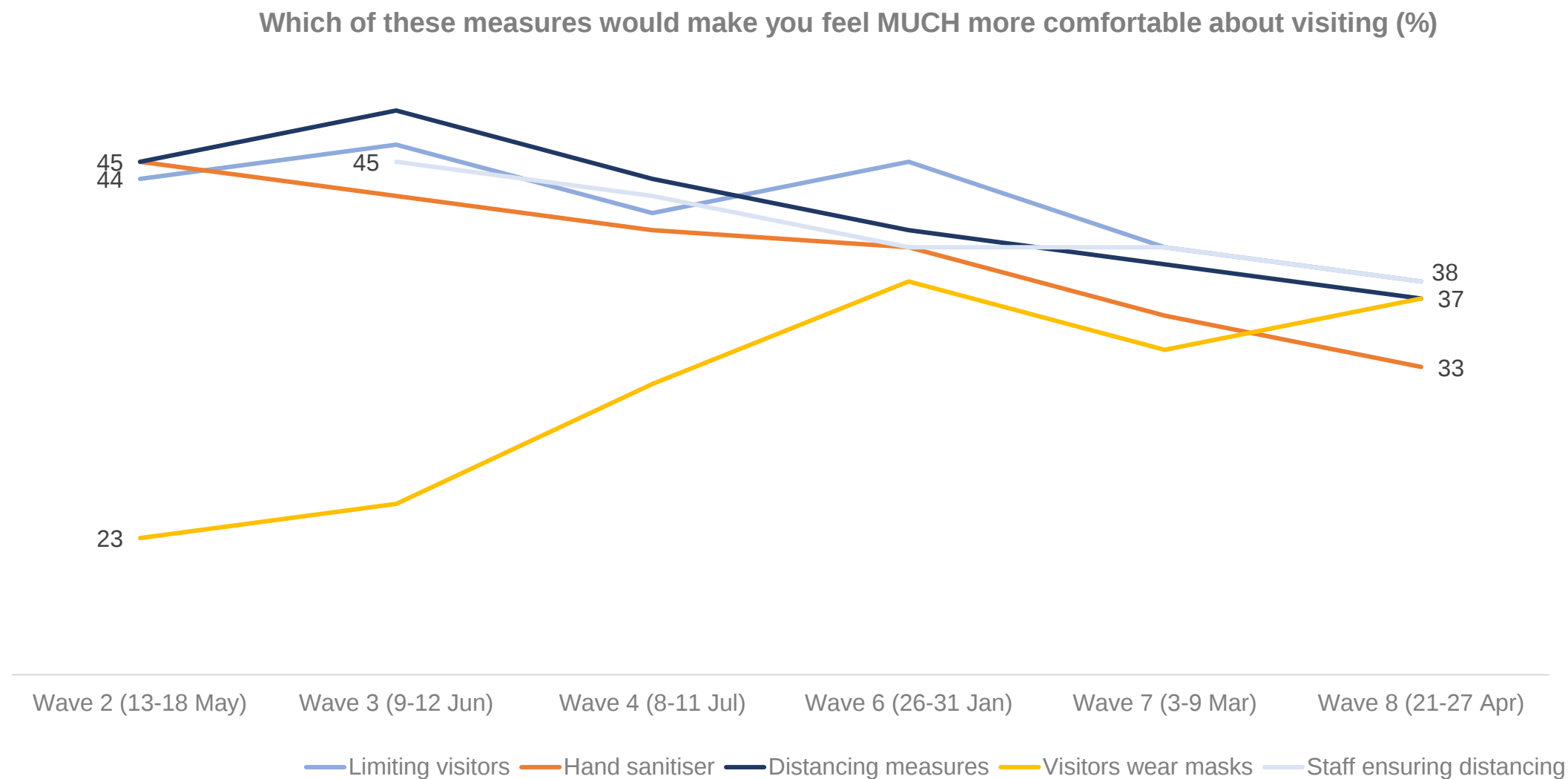
Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?

Bases: All respondents – Wave 8 (1,066)

The impact of providing hand sanitiser on feelings of safety has decreased notably over time, although measures focussed on distancing have remained highly comforting



Compulsory wearing of face coverings is now more comforting than hand sanitiser in the eyes of prospective visitors

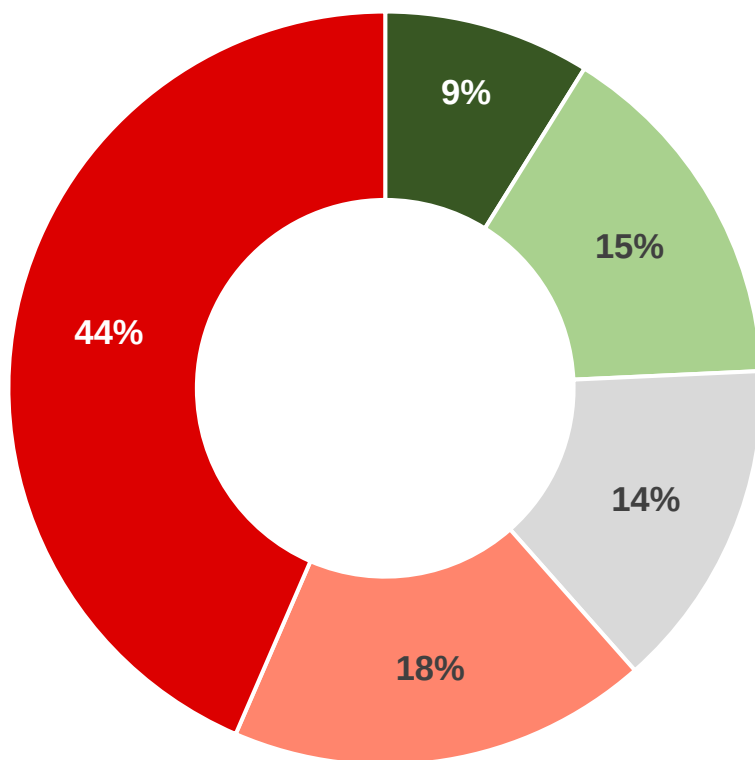


Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?

Base: All respondents

We would appear to be some way off the public feeling comfortable about removing Covid-19 safety measures from visitor attractions

Wave 8: Agreement that:
“The time has come to remove all Covid-19 safety measures used by visitor attractions”



■ Agree strongly
■ Agree slightly
■ Neither agree nor disagree
■ Disagree slightly
■ Disagree strongly

Who are more likely to agree (25% overall) ?

Young adults: 16-34s (34%), 35-54s (22%), 55+ (15%)

Families: Children in household (30%)

Members: Members (36%)

Who are more likely to disagree (62% overall) ?

Older adults: 16-34s (47%), 35-54s (62%), 55+ (80%)

Non-families: No children in household (66%)

Members: Non-members (66%)



Key take-outs

ALVA



Key take-outs (*Wave 8: 21-27 April*)

Since early March there has been a further very strong positive shift in appetite for visiting attractions when they re-open. In particular, much of the large 'stubbornly cautious' segment are now at least beginning to consider visiting

With visit appetite now way higher than at the point when attractions re-opened in 2020, we might expect higher demand than last year – particularly once the 'wait and see' segment are reassured on safety

Although still lower among those aged 55 or over, visit appetite has grown significantly across all age groups since early March and regional differences have disappeared

However, even with the perceived success of the vaccine rollout and continued declining infection rates, there is a lingering nervousness about the visit attraction experience when returning to visit – particularly around crowds and distancing

Three-quarters of the attractions-visiting public are not yet ready to remove Covid-19 safety measures, again especially those focussed on distancing

Once vaccines have been fully rolled out to the population, there is notable support for some form of 'proof of vaccination or exemption' to gain entry to attractions, particularly indoor venues

80% of the attractions-visiting public in London would now use public transport to visit attractions

A reminder about tracking visitors at your attraction:

ALVA Visitor Recovery Benchmarking

ALVA

Visitor tracking survey to understand how visitors have been reacting to safety measures, their impact on visit experience as well as how visitor profile, motivations and marketing triggers are changing

Story so far..... 44 attractions participating and 43,000 visitor survey responses (Jun-Dec 2020)

Going forward..... 35-40 attractions participating until October 2021

A reminder:

- dh Online post-visit survey sent to visitors
- dh Questionnaire updated for 2021: esp. how safety measures have impacted the visit experience
- dh Results via online dashboard and analysis tool on a shared basis - benchmarks for sectors and individual attractions
- dh Bespoke questions and reporting available
- dh Low cost – less than £1,000 per attraction, with large discounts for multiple attractions

To discuss how this might help you, use this form to get in touch: <https://www.surveymonkey.co.uk/r/LBF7WMQ>

Contact

Steve Mills, *Director*



+44 (0) 7532 666884



+44 (0) 20 3287 9444



steve.mills@decisionhouse.co.uk

www.decisionhouse.co.uk



@decision_house

Questionnaire: Wave 6 (26-31 Jan 2021)

ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE – WAVE 6

SAMPLE DEFINITION:

- Adults aged 18 or over who visited attractions at least once in the UK in 2019

Q1. During 2019 (so before the Coronavirus pandemic), approximately how many times did you go to visitor attractions in the UK, either on day trips from home or whilst on holiday? By visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

- More than 20 times
11-20 times
8-10 times
5-7 times
3-4 times
Once or twice
Not at all

IF VISITED ATTRACTIONS AT LEAST ONCE AT Q1, ASK MAIN QUESTIONNAIRE. OTHERS CLOSE

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they re-open to the public following the current lockdown. Again, by visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q1. Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.
OPEN RESPONSE

Q2. In what ways do you currently feel differently about the prospect of visiting attractions, compared with how you felt during the first lockdown in April to June last year? Please give as much detail as possible.
OPEN RESPONSE

Q3. Can we just check, which of these types of attraction have you visited at all since June last year, so since the first lockdown ended? RANDOMISE ORDER

- Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions
None of these

Q4. Can we just check, have you received at least the first dose of the Covid-19 vaccine?

1. Yes
2. No, but I will take it when offered
3. No and I will not take it
4. Prefer not to say

IF CODES 2 OR 4 AT Q4, ASK BOTH Q5A AND Q5B

IF CODE 1 AT Q4, ASK Q5A ONLY

IF CODE 3 AT Q4, ASK Q5B ONLY

ROTATE Q5A AND Q5B

Q5a. Assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER
I have already visited (the outdoor elements) in January this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5b. Assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER
I have already visited (the outdoor elements) in January this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

- Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q6. Thinking about when you start considering visiting attractions again after they re-open, which of these measures would make you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

- Hand sanitiser on entrance and around the site
Staff visibly cleaning surfaces, utensils, machinery etc.
Videos on the website showing the special measures in place at the site
Notices around the site reassuring visitors about cleaning and other measures in place
All staff wearing masks or gloves
Compulsory for visitors to wear masks or face coverings
Social distancing measures in entrance queues and around the site
Limiting numbers of visitors on site at any one time e.g. timed tickets, online bookings only
Maximising distance from staff e.g. contactless payment only, self-service café
Taking the temperature of all visitors on entering
Staff making sure that visitors follow social distancing measures
Compulsory to book your visit online in advance

Q7a. Again, thinking about when you start considering visiting attractions again after they have re-opened, which of these, if any, would you feel more anxious or uncomfortable about using than usual?
RANDOMISE ORDER

Q7b. Before the Coronavirus outbreak, which of these did you ever use at visitor attractions?

- Cafes / restaurants – indoor seating areas
Cafes / restaurants – outdoor seating areas
Outdoor kiosks selling food / drink
Shops
Toilets
Playgrounds – indoors
Playgrounds – outdoors
Audioguides / headphone tours
Guided tours – indoors
Guided tours – outdoors
Indoor events e.g. talks, shows
Outdoor events e.g. concerts, cinema
Interactive exhibits that visitors touch in some way
Other (please tell us what) [ONLY SHOWN IN Q5a NOT Q5b]
None

Q8. Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. Again, thinking about when you start considering visiting attractions again after they have re-opened, how do you feel about using each of these types of public transport to travel to visitor attractions? RANDOMISE ORDER
(I am / would be comfortable using, I am / would be anxious but would probably use, I am / would be anxious and would not use, I never travelled to attractions using this transport anyway)

- Underground / metro train
Overground train
Public bus
Taxi / minicab

Q9. Before the Coronavirus outbreak, how often would you say that you tended to visit each of these types of attraction? RANDOMISE ORDER
(Every couple of weeks or more often, About once a month, Every 2-3 months, Every 4-6 months, About once a year, Less often, Never)

- Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q10. Which, if any, of these organisations are you currently a member, season ticket holder or Friend of?

- National Trust
English Heritage
RHS
National Art Pass (Art Fund)
Merlin Pass
Other historic/heritage attraction
Other garden attraction
A museum or gallery
A zoo/wildlife attraction or farm
Another type of visitor attraction
None of these

Q11. Which of the following best describes you?

- I tested positive for Covid-19 during 2020 or 2021
I did not test positive for Covid-19 but I had the recognised symptoms
I did not test positive for Covid-19 and I have not had the symptoms
Prefer not to say

DEMOGRAPHICS COLLECTED:

- Age
Age of children in household
Gender
Region of Residence
Social Grade

Questionnaire: Wave 7 (3-9 Mar 2021)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE – WAVE 7

SAMPLE DEFINITION:

- Adults aged 16 or over who visited attractions at least once in the UK in 2019

Q4. During 2019 (so before the Coronavirus pandemic), approximately how many times did you go to visitor attractions in the UK, either on day trips from home or whilst on holiday? By visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

More than 20 times
11-20 times
8-10 times
5-7 times
3-4 times
Once or twice
Not at all

IF VISITED ATTRACTIONS AT LEAST ONCE AT Q4, ASK MAIN QUESTIONNAIRE. OTHERS CLOSE

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they re-open to the public following the current lockdown. Again, by visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q1. Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.

OPEN RESPONSE

Q2. In what ways do you currently feel differently about the prospect of visiting attractions, compared with how you felt during the first lockdown in April to June last year? Please give as much detail as possible.

OPEN RESPONSE

Q3. Can we just check, which of these types of attraction have you visited at all since June last year, so since the first lockdown ended? RANDOMISE ORDER

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions
None of these

Q4. Can we just check, have you received at least the first dose of the Covid-19 vaccine?

- Yes
- No, but I will take it when offered
- No and I will not take it
- Prefer not to say

IF CODES 2 OR 4 AT Q4, ASK BOTH BLOCKS Q5A, Q5AI AND Q5B, Q5BI

IF CODE 1 AT Q4, ASK Q5A AND Q5AI ONLY

IF CODE 3 AT Q4, ASK Q5B AND Q5BI ONLY

ROTATE Q5A, Q5AI AND Q5B, Q5BI IN TWO BLOCKS

Q5a. Assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER

I have already visited (the outdoor elements) in January/February this year. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5ai. And still assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of venue after they re-open following the current lockdown? RANDOMISE ORDER

I have already visited in January/February this year. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

Q5b. Assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER

I have already visited (the outdoor elements) in January/February this year. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5bi. And still assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of venue after they re-open following the current lockdown? RANDOMISE ORDER

I have already visited in January/February this year. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

LIST OF ATTRACTIONS FOR Q5A AND Q5B:

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

LIST OF VENUES FOR Q5AI AND Q5BI:

Theatres
Music concerts (indoors)
Music concerts / festivals (outdoors)

Q6. Thinking about when you start considering visiting attractions again after they re-open, which of these measures would make you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

Hand sanitiser on entrance and around the site
Staff visibly cleaning surfaces, utensils, machinery etc.
Videos on the website showing the special measures in place at the site
Notices around the site reassuring visitors about cleaning and other measures in place
All staff wearing masks or gloves
Compulsory for visitors to wear masks or face coverings
Social distancing measures in entrance queues and around the site
Limiting numbers of visitors on site at any one time e.g. timed tickets, online bookings only
Maximising distance from staff e.g. contactless payment only, self-service café, Perspex screens
Taking the temperature of all visitors on entering
Staff making sure that visitors follow social distancing measures
Compulsory to book your visit online in advance

Q7a. Again, thinking about when you start considering visiting attractions again after they have re-opened, which of these, if any, would you feel more anxious or uncomfortable about using than usual?

RANDOMISE ORDER

Q7b. Before the Coronavirus outbreak, which of these did you ever use at visitor attractions?

Cafes / restaurants – indoor seating areas
Cafes / restaurants – outdoor seating areas
Outdoor kiosks selling food / drink
Shops
Toilets
Playgrounds – indoors
Playgrounds – outdoors
Audio guides / headphone tours
Guided tours – indoors
Guided tours – outdoors
Indoor events e.g. talks, shows
Outdoor events e.g. concerts, cinema
Interactive exhibits that visitors touch in some way
Other (please tell us what _____) [ONLY SHOWN IN Q5a NOT Q5b]
None

Q8. Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. Again, thinking about when you start considering visiting attractions again after they have re-opened, how do you feel about using each of these types of public transport to travel to visitor attractions? RANDOMISE ORDER

(I am / would be comfortable using, I am / would be anxious but would probably use, I am / would be anxious and would not use, I never travelled to attractions using this transport anyway)

Underground / metro train
Overground train
Public bus
Taxi / minicab

ASK ENGLAND RESIDENTS ONLY

Q8a. The government has stated that the indoor spaces of visitor attractions (including museums, galleries and historic houses) will potentially be allowed to re-open on 17 May. Non-essential shops will potentially be allowed to re-open on 12 April. Which of these statements best describes your feelings about this? RANDOMISE ORDER

Indoor spaces of visitor attractions should be allowed to re-open at the same time as non-essential shops on 12 April
It is right that the indoor spaces of visitor attractions should only be allowed to open on 17 May
Don't know

Q9. Before the Coronavirus outbreak, how often would you say that you tended to visit each of these types of attraction? RANDOMISE ORDER

(Every couple of weeks or more often, About once a month, Every 2-3 months, Every 4-6 months, About once a year, Less often, Never)
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q10. Which, if any, of these organisations are you currently a member, season ticket holder or friend of?

National Trust
English Heritage
RHS
National Art Pass (Art Fund)
Merlin Pass
Other historic/heritage attraction
Other garden attraction
A museum or gallery
A zoo/wildlife attraction or farm
Another type of visitor attraction
None of these

Questionnaire: Wave 8 (21-27 Apr 2021)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE – WAVE 8

SAMPLE DEFINITION:

- Adults aged 16 or over who visited attractions at least once in the UK in 2019

QA. During 2019 (so before the Coronavirus pandemic), approximately how many times did you go to visitor attractions in the UK, either on day trips from home or whilst on holiday? By visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

More than 20 times
11-20 times
8-10 times
5-7 times
3-4 times
Once or twice
Not at all

IF VISITED ATTRACTIONS AT LEAST ONCE AT QA, ASK MAIN QUESTIONNAIRE. OTHERS CLOSE

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they have re-opened to the public following the most recent lockdown. Again, by visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q1. Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. Please give as much detail as possible.
OPEN RESPONSE

Q2. In what ways do you currently feel differently about visiting attractions, compared with how you felt during the first lockdown in April to June last year? Please give as much detail as possible.
OPEN RESPONSE

NO Q3

Q4. Can we just check, have you received at least the first dose of the Covid-19 vaccine?
1. Yes
2. No, but I will take it when offered
3. No and I will not take it
4. Prefer not to say

IF CODES 2 OR 4 AT Q4, ASK BOTH BLOCKS Q5A, Q5AI AND Q5B, Q5BI
IF CODE 1 AT Q4, ASK Q5A AND Q5AI ONLY
IF CODE 3 AT Q4, ASK Q5B AND Q5BI ONLY

ROTATE Q5A, Q5AI AND Q5B, Q5BI IN TWO BLOCKS

Q5a. Assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it will be before you visit each of these types of attraction after they re-open following the most recent lockdown? RANDOMISE ORDER

I have already visited (the outdoor elements) in 2021. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5ai. And still assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it will be before you visit each of these types of venue after they re-open following the most recent lockdown? RANDOMISE ORDER
I have already visited in 2021. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

Q5b. Assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it will be before you visit each of these types of attraction after they re-open following the most recent lockdown? RANDOMISE ORDER

I have already visited (the outdoor elements) in 2021. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5bi. And still assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it will be before you visit each of these types of venue after they re-open following the most recent lockdown? RANDOMISE ORDER

I have already visited in 2021. As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

LIST OF ATTRACTIONS FOR Q5A AND Q5B:

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

LIST OF VENUES FOR Q5AI AND Q5BI:

Theatres
Music concerts (indoors)
Music concerts / festivals (outdoors)

Q6. Thinking about visiting attractions generally after they re-open, which of these measures would make / are making you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

Hand sanitiser on entrance and around the site
Staff visibly cleaning surfaces, utensils, machinery etc.
Videos on the website showing the special measures in place at the site
Notices around the site reassuring visitors about cleaning and other measures in place
All staff wearing masks or gloves
Compulsory for visitors to wear masks or face coverings
Social distancing measures in entrance queues and around the site
Limiting numbers of visitors on site at any one time e.g. timed tickets, online bookings only
Maximising distance from staff e.g. contactless payment only, self-service café, Perspex screens
Taking the temperature of all visitors on entering
Staff making sure that visitors follow social distancing measures
Compulsory to book your visit online in advance

Q7a. At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual after they have re-opened? RANDOMISE ORDER

Q7b. Before the Coronavirus outbreak, which of these did you ever use at visitor attractions?

Cafes / restaurants – indoor seating areas
Cafes / restaurants – outdoor seating areas
Outdoor kiosks selling food / drink
Shops
Toilets
Playgrounds – indoors
Playgrounds – outdoors
Audioguides / headphone tours
Guided tours – indoors
Guided tours – outdoors
Indoor events e.g. talks, shows
Outdoor events e.g. concerts, cinema
Interactive exhibits that visitors touch in some way
(Other please tell us what _____) [ONLY SHOWN IN Q7a NOT Q7b]
None

Q7c. Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes your attitude towards using some form of proof of vaccination to gain entry to each of the following experiences ... (INSERT ATTRACTION TYPE)?

Indoor attractions e.g. museums, historic houses, Outdoor attractions e.g. gardens, zoos, Indoor events e.g. concerts, talks, Outdoor events e.g. concerts, festivals

REPEAT FOR EACH ATTRACTION TYPE – ROTATE ORDER

So, for this type of experience I would prefer it if.....

All visitors had to provide proof of vaccination
All visitors had to provide proof of vaccination or proof of exemption from vaccination
Proof of vaccination was not made a condition of entry for anyone
I don't tend to go to this type of experience anyway

Q7d. How much do you agree or disagree with the following statement "The time has come to remove all Covid-19 safety measures used by visitor attractions"?
Agree strongly, Agree slightly, Neither agree nor disagree, Disagree slightly, Disagree strongly

Q8. Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How do you feel about using each of these types of public transport to travel to visitor attractions after they have re-opened? RANDOMISE ORDER
(I am / would be comfortable using, I am / would be anxious but would probably use, I am / would be anxious and would not use, I never travelled to attractions using this transport anyway)

Underground / metro train
Overground train
Public bus
Taxi / minicab

Q9. Before the Coronavirus outbreak, how often would you say that you tended to visit each of these types of attraction? RANDOMISE ORDER
(Every couple of weeks or more often, About once a month, Every 2-3 months, Every 4-6 months, About once a year, Less often, Never)

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q10. Which, if any, of these organisations are you currently a member, season ticket holder or friend of?

National Trust
English Heritage
RHS
National Art Pass (Art Fund)
Merlin Pass
Other historic/heritage attraction
Other garden attraction
A museum or gallery
A zoo/wildlife attraction or farm
Another type of visitor attraction
None of these

DEMOGRAPHICS COLLECTED:

Age
Age of children in household
Gender
Region of Residence
Social Grade