



ALVA Attractions Recovery Tracker

Wave 9

Fieldwork: 17-22 June 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

Wave 8: 21-27 April

**1,066
survey
responses**

London
c.200

Scot.
c.300

Wave 8: 17-22 June

**884
survey
responses**

London
c.200

Scot.
c.100

Lockdown easing announcement (22 Feb)

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

Announcement extending Eng. restrictions (14 Jun)

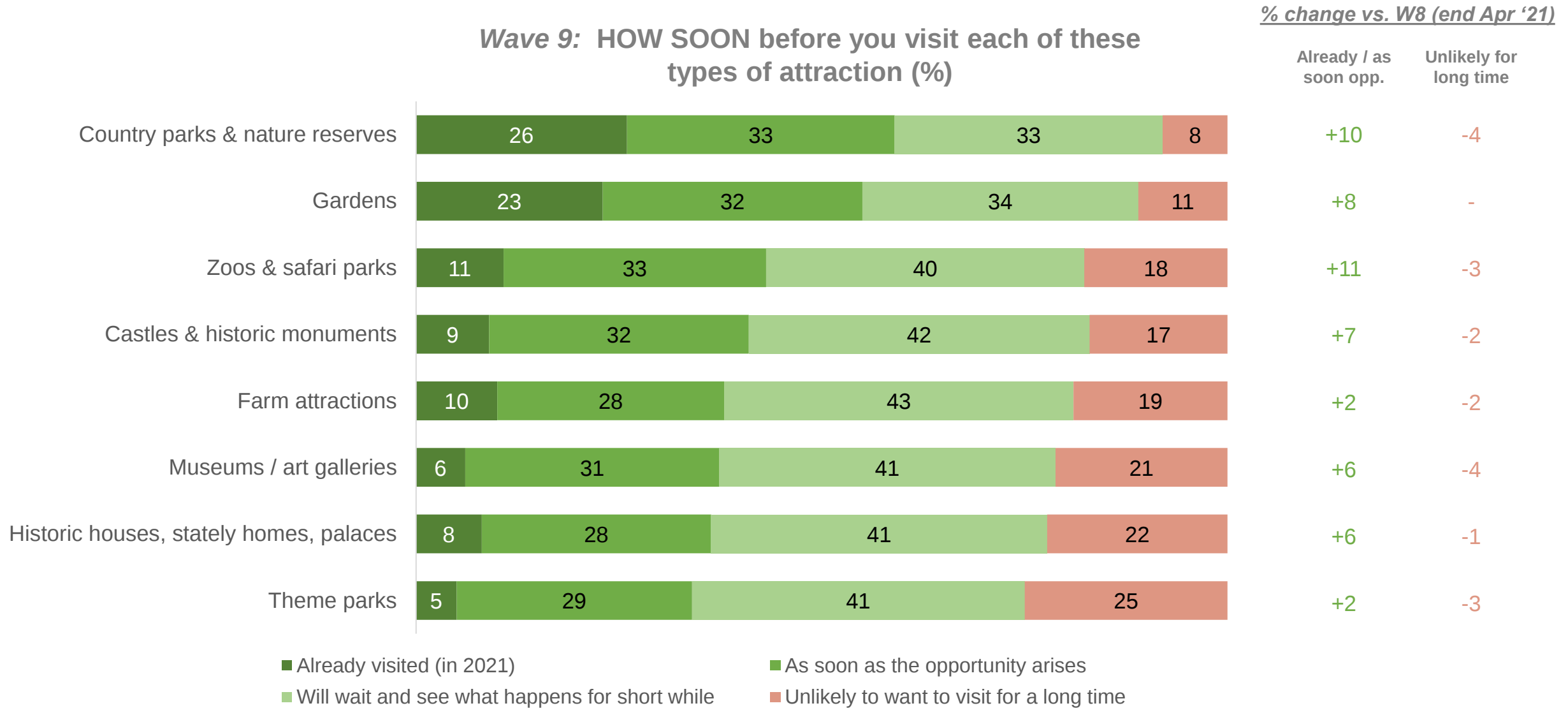


How is the public feeling
about visiting attractions?

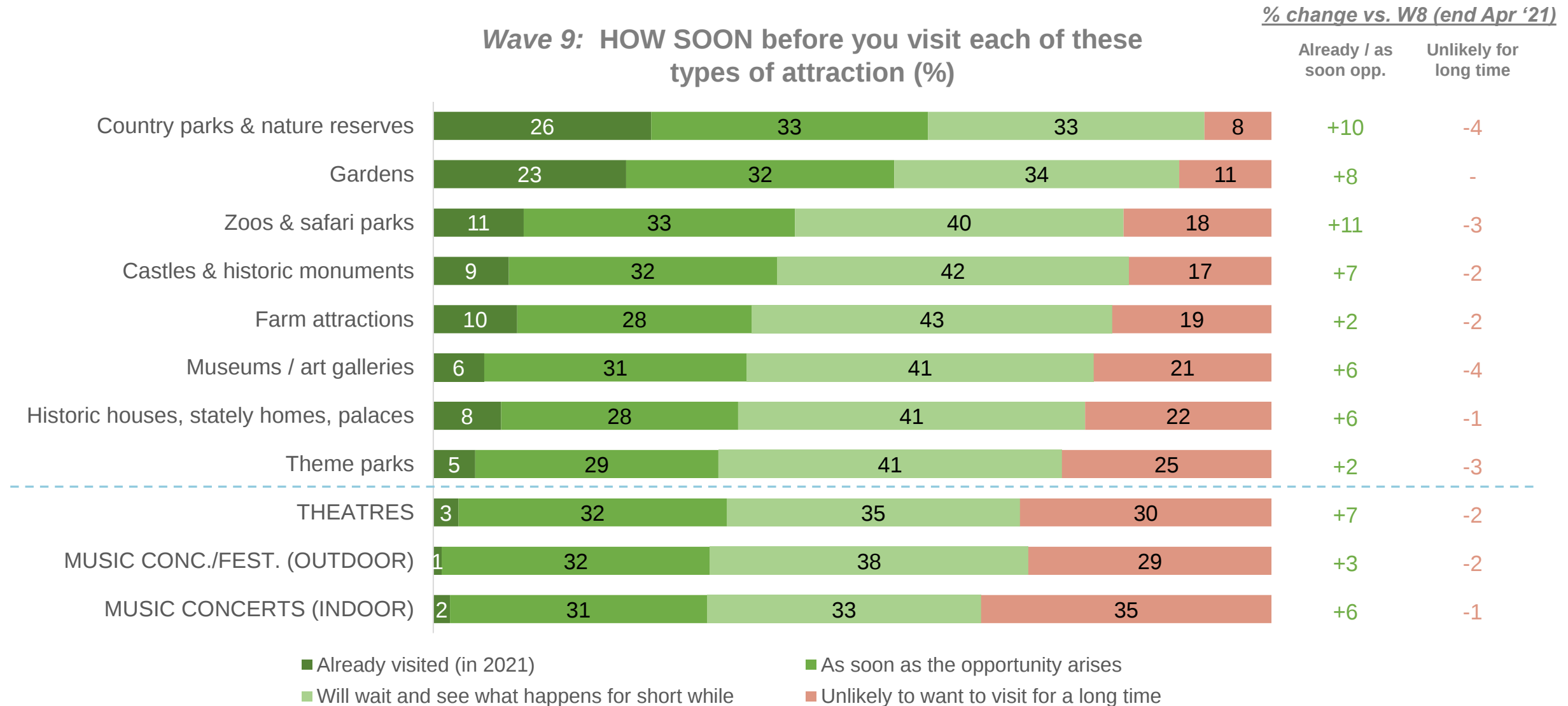
ALVA

decision
house

Since late April, there has been another positive shift in appetite for visiting attractions. In particular, some of those 'waiting to see what happens for a short while' are now ready to visit, although this hesitant group still represents around 40% of the market

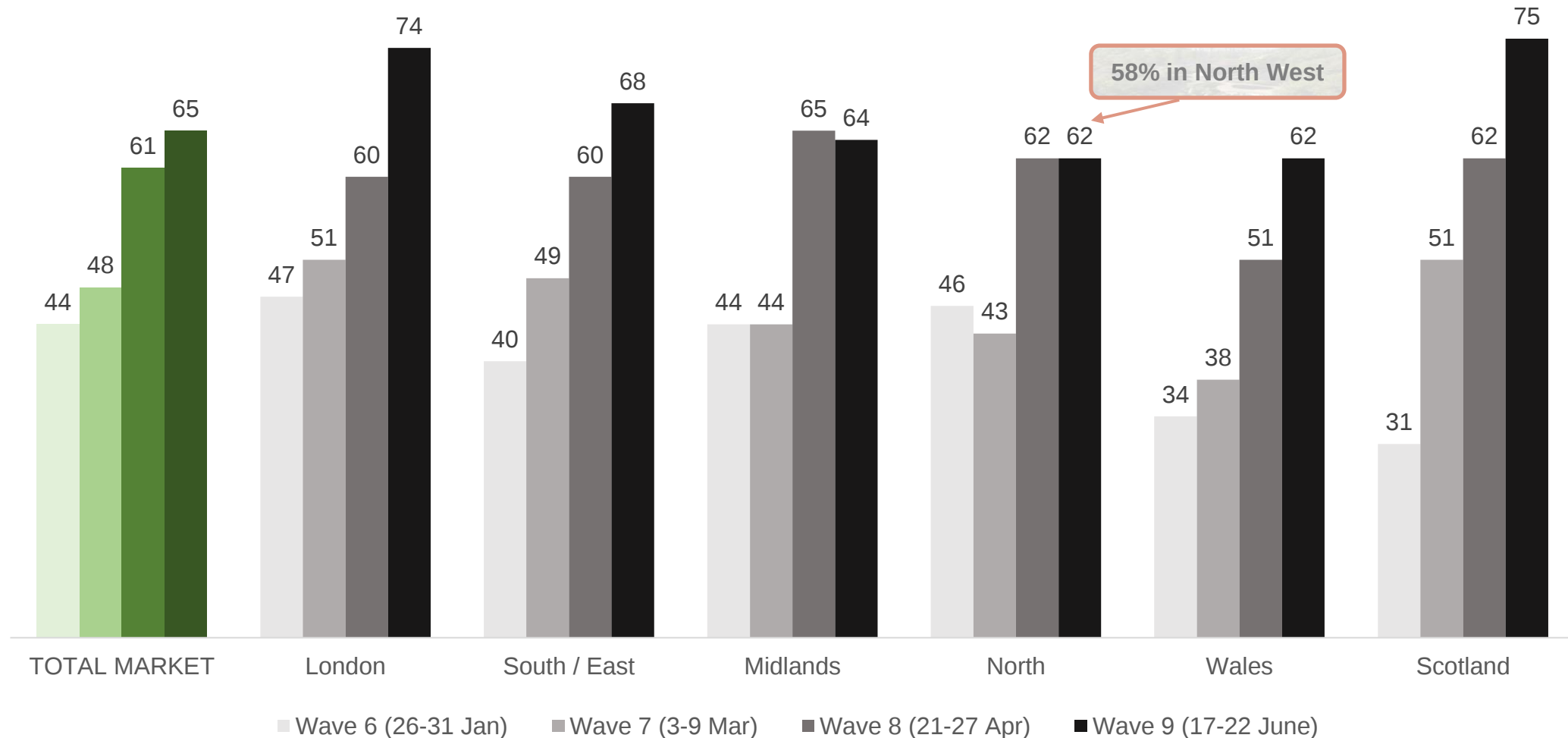


Appetite for visiting theatres and concert venues is also growing, although behind the curve of attractions, with the 'stubbornly cautious' segment remaining noticeably higher



Appetite for visiting has continued to grow in the South of England, Wales and Scotland, although it has stalled elsewhere in England – particularly the North West

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

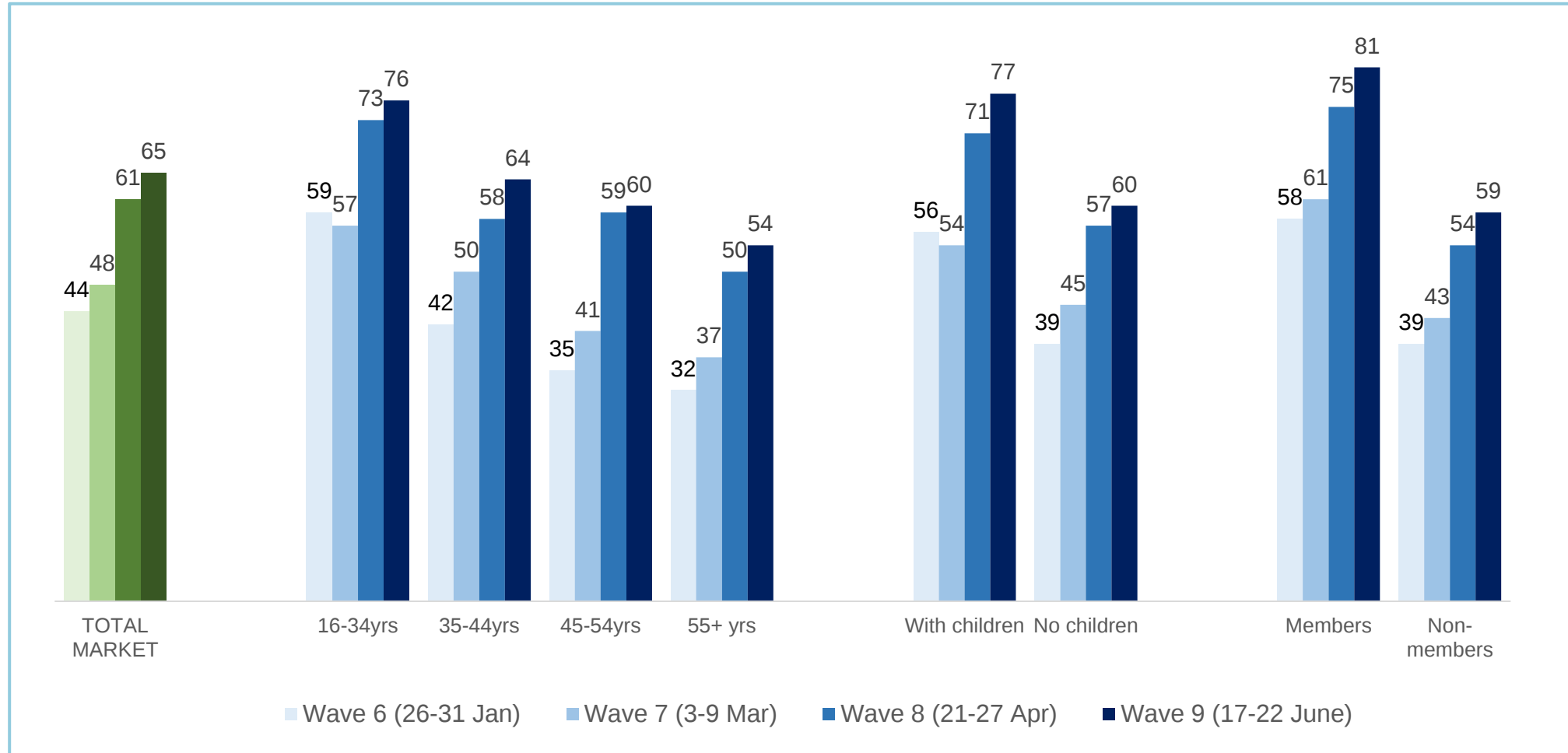


Q: How soon do you think it will be before you visit each of these types of attraction after they re-open following the most recent lockdown?

Base: All respondents (Wave 6: 869, Wave 7: 1,090, Wave 8: 1,066, Wave 9: 884)

Although still lower among the older age groups, visit appetite continues to increase across all age groups and especially families

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

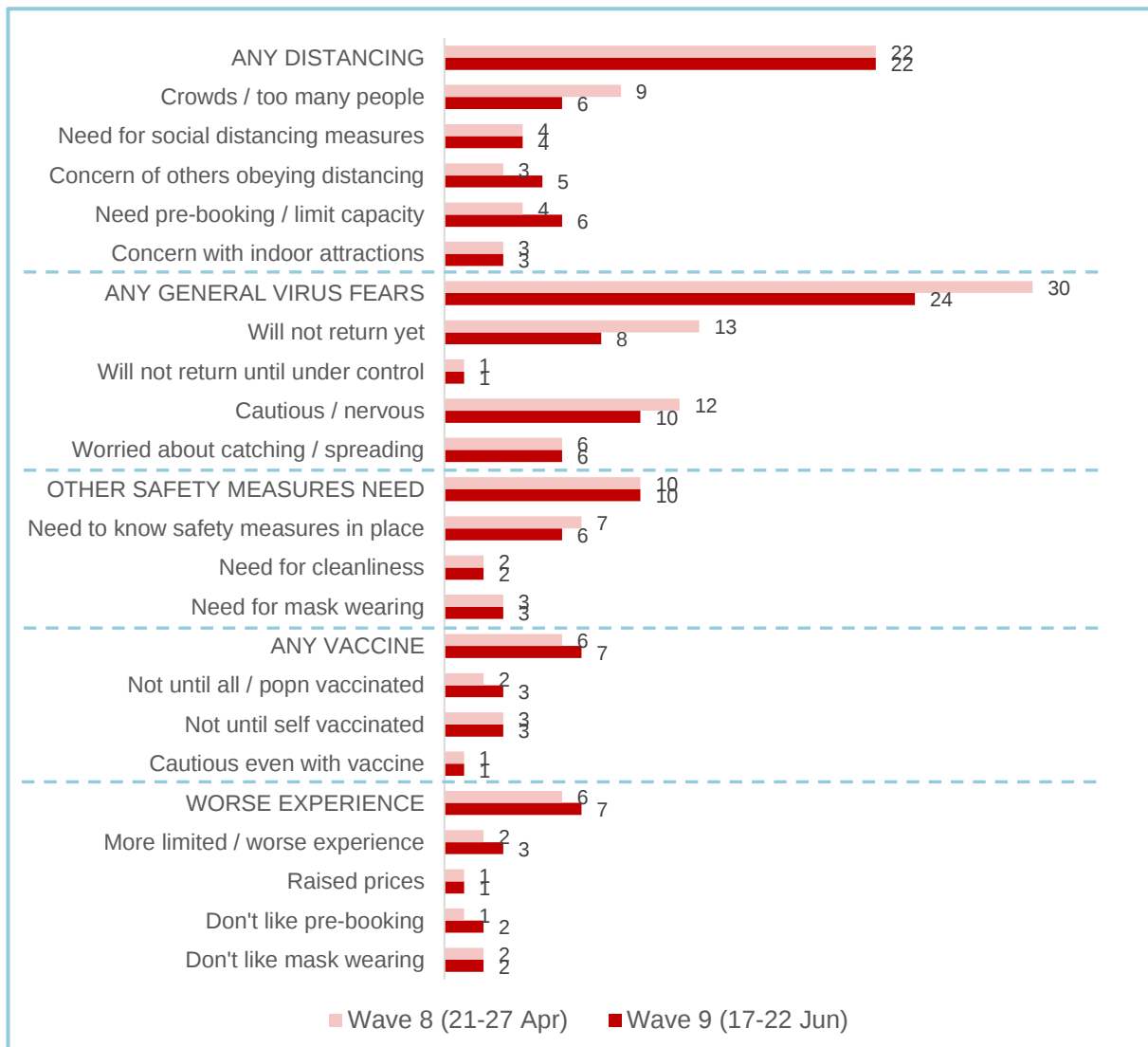


Q: How soon do you think it will be before you visit each of these types of attraction after they re-open following the most recent lockdown?

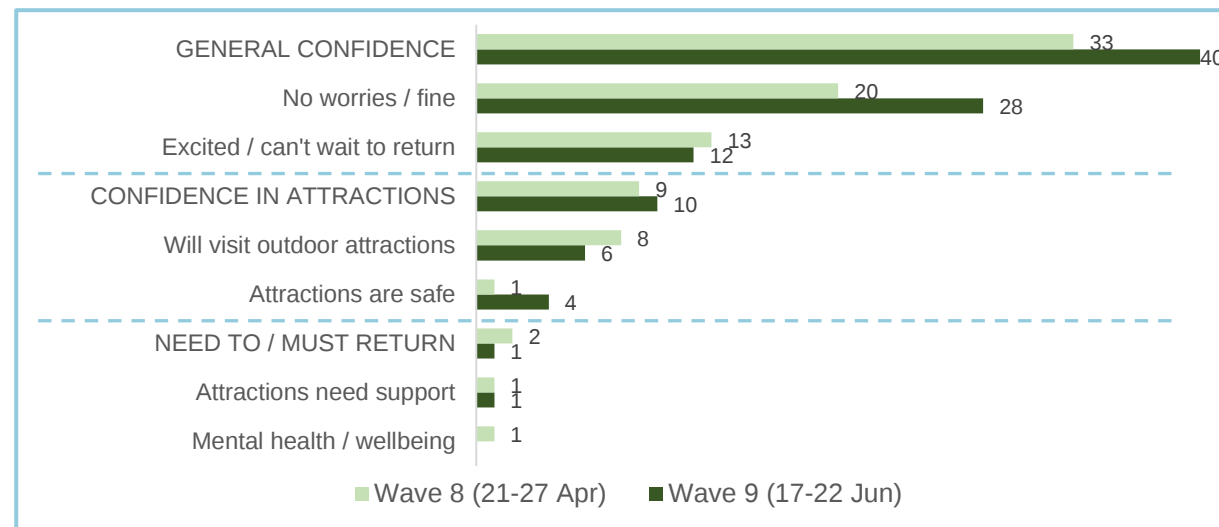
Base: All respondents (Wave 6: 869, Wave 7: 1,090, Wave 8: 1,066, Wave 9: 884)

Although confidence is clearly growing, 60% still express some fear or concerns about visiting – especially around measures to limit crowds / keep distancing

60% expressed fear or concerns about visiting
(73% end Jan, 66% early Mar, 64% end Apr)



51% expressed confidence / desire to return
(26% end Jan, 40% early Mar, 43% end Apr)



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, Wave 9 – main sample, 695)

As restrictions ease, the old chestnut of concern with the behaviour of fellow members of the public is re-emerging, as is a desire for measures to limit capacity

Concern of others obeying distancing (5%)

Nervous about visiting places, as people don't seem to be bothering about social distancing, mask wearing, etc anymore, and I don't want to catch Covid again. I know that the venues themselves and their staff are doing all they can to make places safe, it's just the public that can't be bothered to follow the rules. I would just rather stay at home where I know I'm safe.

I do not really feel safe as I think that most people are not social distancing properly and there have been more cases rising so it does not feel right to travel to these destinations just yet.

At the moment I'm a little wary of it as some people aren't taking the precaution of wearing a mask

I will bide my time until it feels safe, I trust the people who run the attractions to make them safe but sadly from observing people in the seaside town where I live I am unable to trust my fellow human beings to behave sensibly

Don't want to go to them as there is no social distancing as I have been told that people are taking no notice of it any more

Personally, I trust the businesses/charities to follow the rules but I just don't trust members of the public to follow the rules properly and the businesses have no actual powers to enforce the rules so I won't be visiting anywhere anytime soon.

Need pre-booking / limit capacity (6%)

I think that as long as they manage their capacity and it allows everyone to keep socially distanced, then its fine / Personally, I wouldn't go to one until its completely safe

Not too much of a problem as long as visits are pre-booked and safe arrangements are in place.

Happy to visit however numbers need to be reduced still. People are desperate to visit these attractions it will be so busy during the Summer

I am quite happy to visit attractions providing they are following safety rules. I quite like having to book things in advance rather than just turning up so I know I will be okay to go in

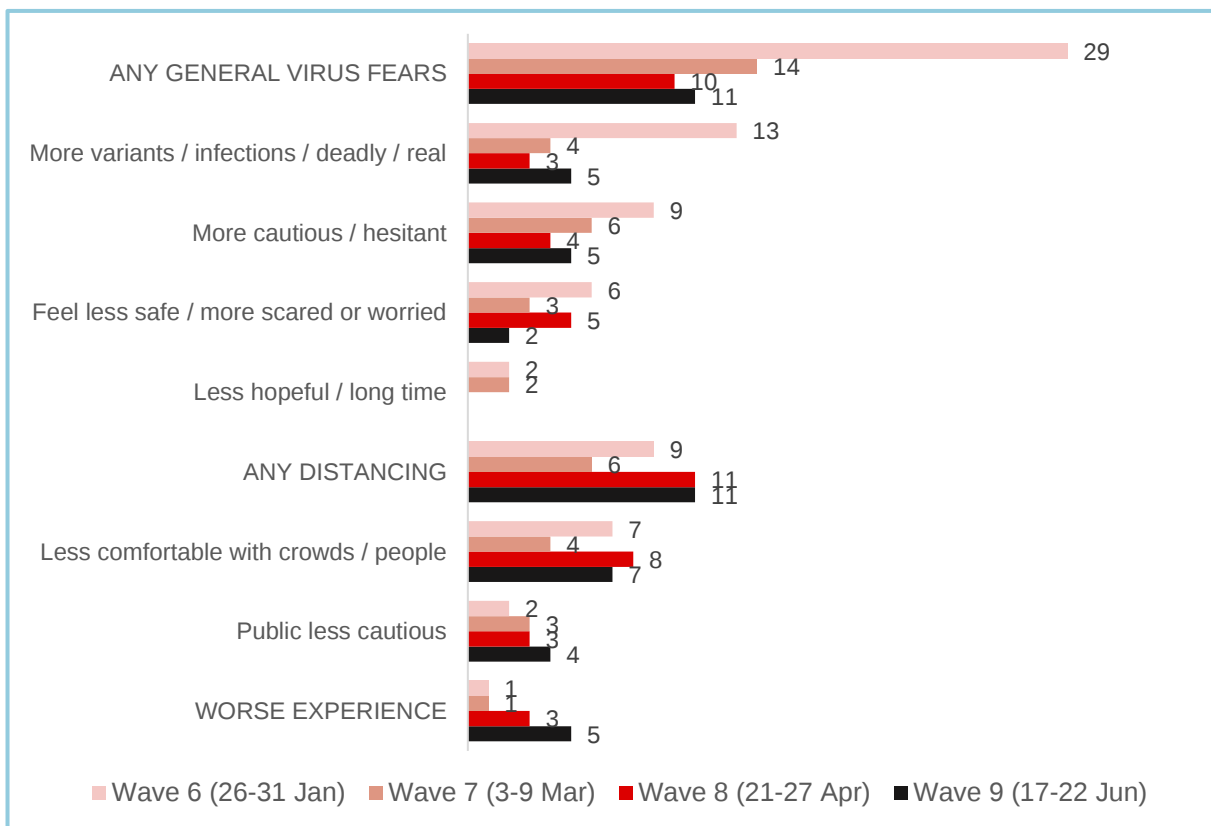
I am happy to go as long as its a bookable ticket, so I know that it won't be too crowded

if they are outdoor fine. And actually because of the need to prebook they are less busy and therefore more pleasant. Indoor, still feeling cautious

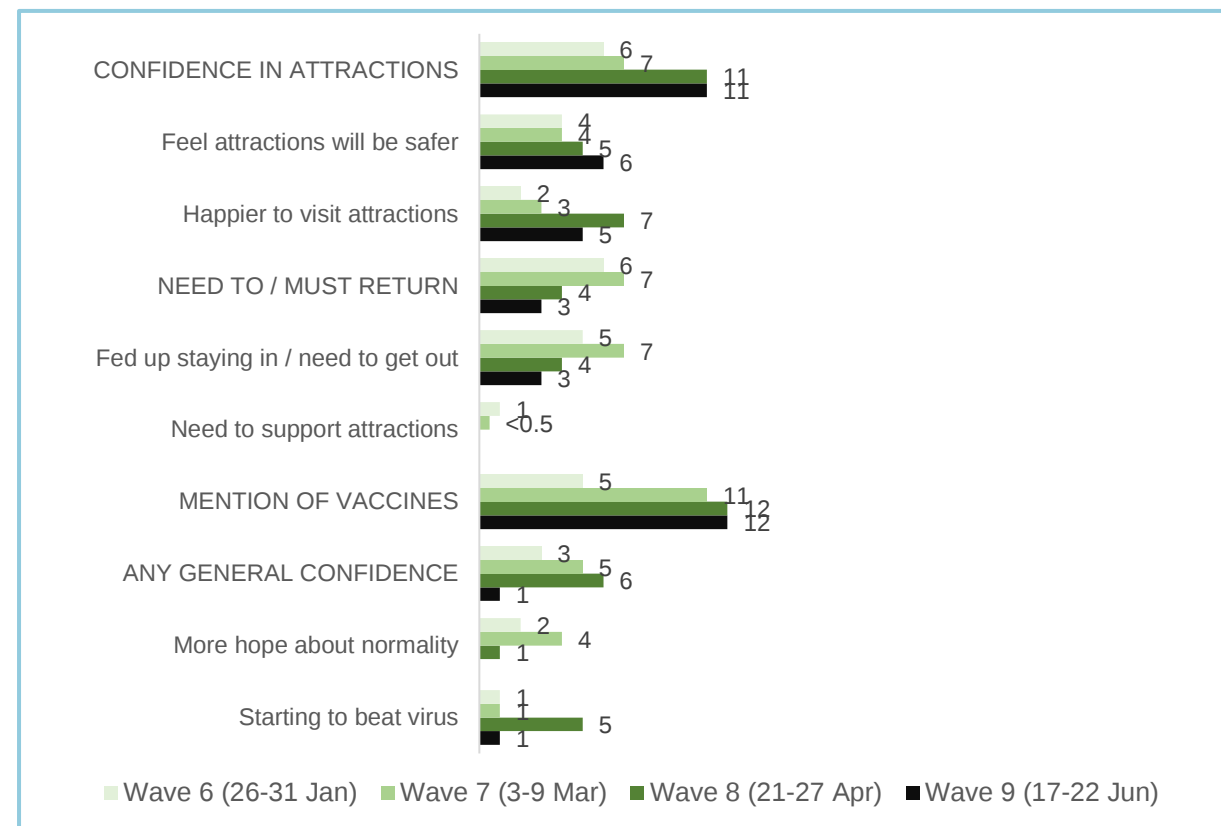
Whilst vaccines have been a game changer in driving confidence, fears of crowds have now become ingrained for many

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

28% feel LESS positive about prospect of visiting attractions than in first lockdown
(39% end Jan, 22% early Mar, 25% end Apr)



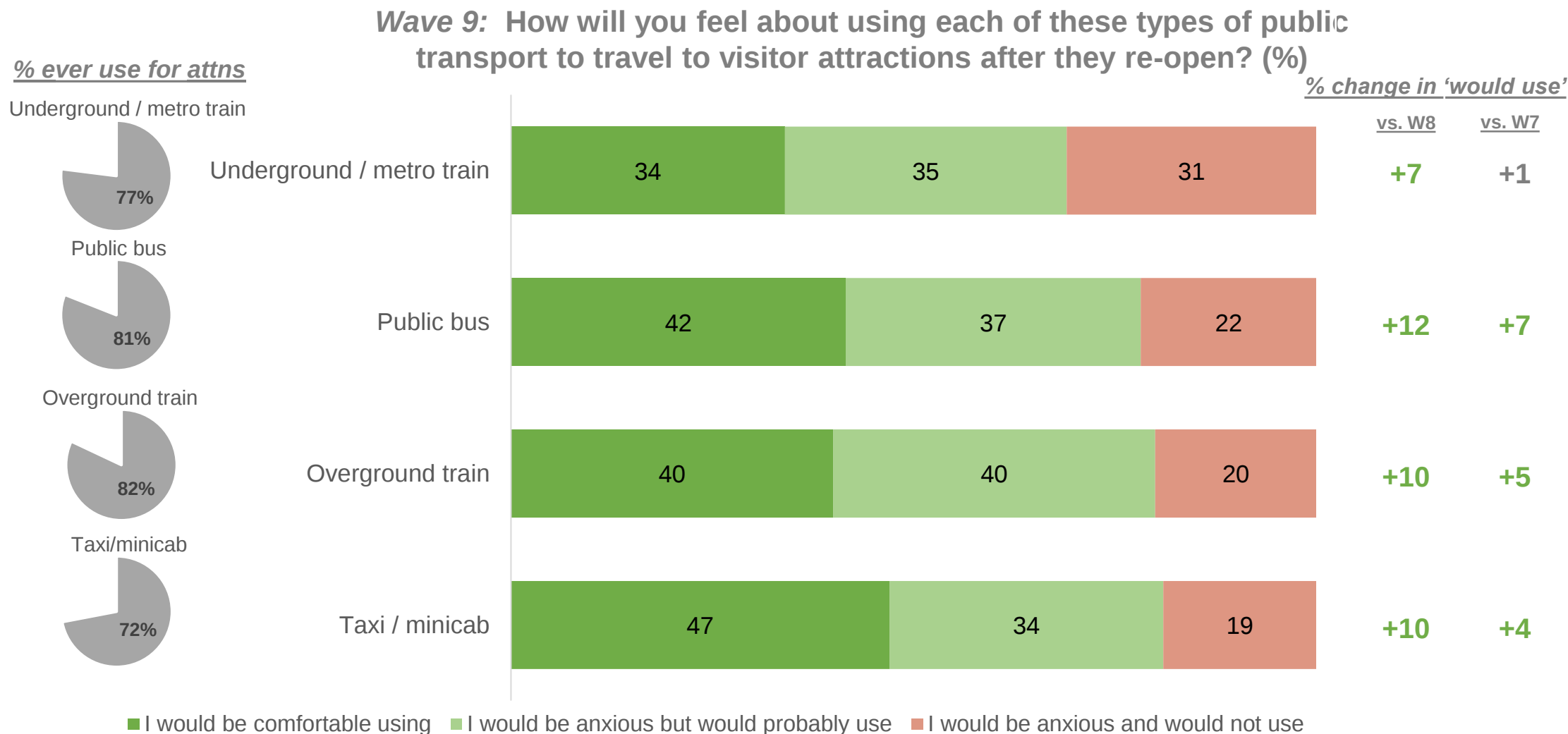
26% feel MORE positive about prospect of visiting attractions than in first lockdown
(18% end Jan, 29% early Mar, 31% end Apr)



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 6 – main sample, 694, Wave 7 – main sample, 687, Wave 8 – main sample, 708)

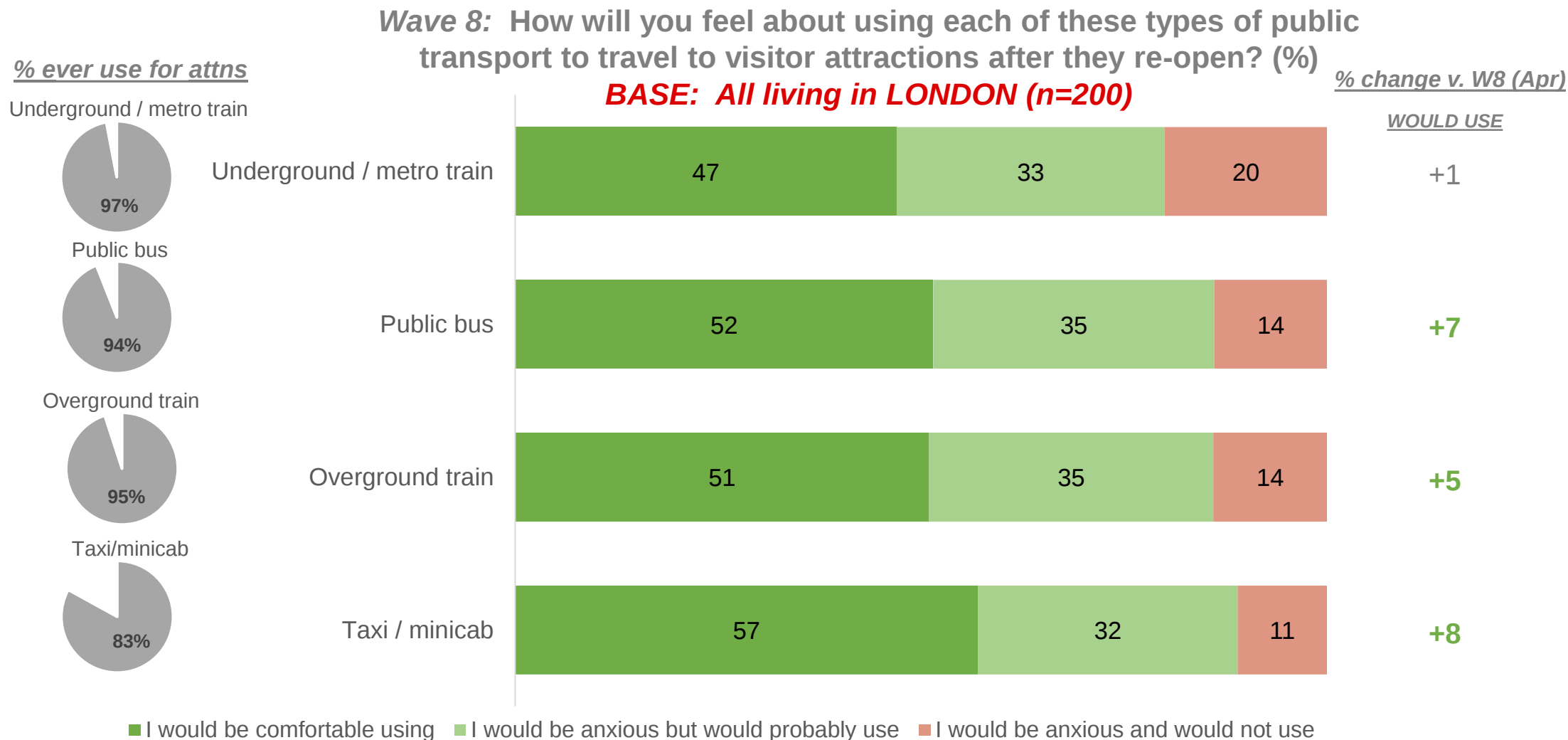
There has been a strong positive step change in national confidence around use of public transport since late April, following the slight regression in confidence in the month prior to this



Q: 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

Base: All who ever use each form of transport to travel to visitor attractions, Wave 9

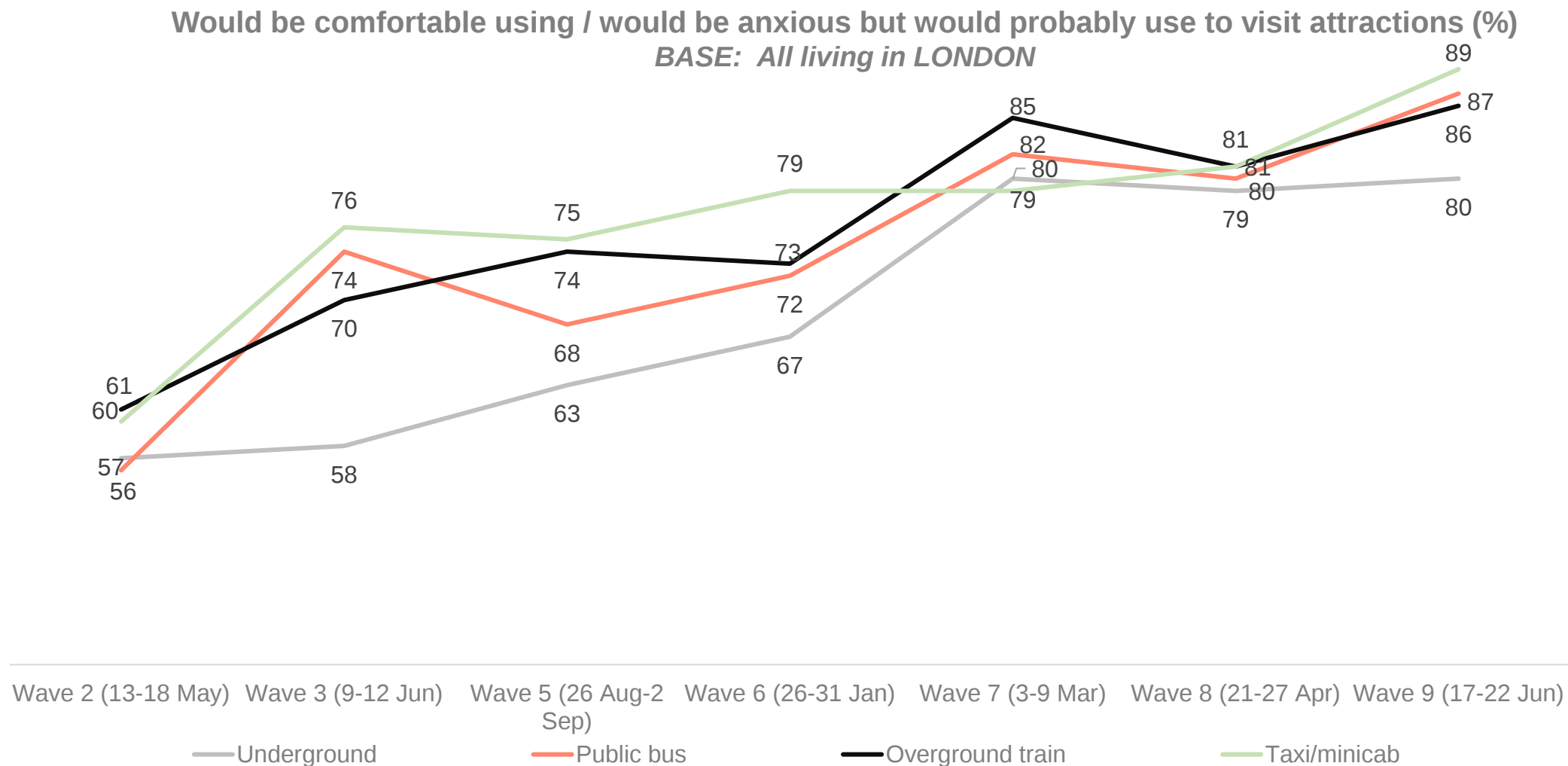
Even among the more confident Londoners, confidence in using public transport has made significant strides since end April



Q: 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

Base: All LONDONERS who ever use each form of transport to travel to visitor attractions, Wave 9

With the exception of the Underground, almost 90% of Londoners now claim that they would use public transport to visit attractions



Q: 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

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

A photograph of a museum gallery dedicated to cycling. In the foreground, a white and red Dolan road bike is displayed on a wooden platform. Behind it, another road bike is visible. To the right, a stationary bike is on display. In the background, a purple road bike is hanging from the ceiling. The walls are dark blue with informational panels and screens. One screen shows a blue bicycle. Another panel has text about Victoria Pendleton. The floor is made of light-colored wood. A bright light source creates a starburst effect in the upper left corner.

How can we build trust and confidence in visiting?

What should we do?

What should we say?

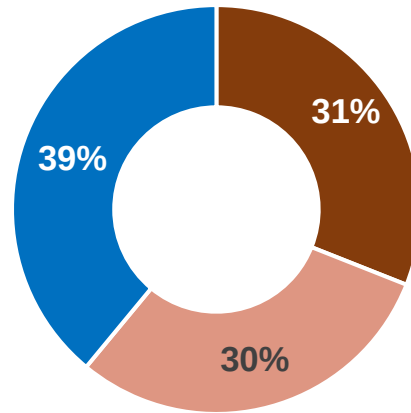
ALVA

decision
house

Although falling slightly since end April, there remains notable support for some form of ‘proof of vaccination / exemption’, especially for indoor venues, once vaccines have been fully rolled out to the population

Wave 9: Preference for use of ‘proof of vaccination’ to gain entry to attractions (%)

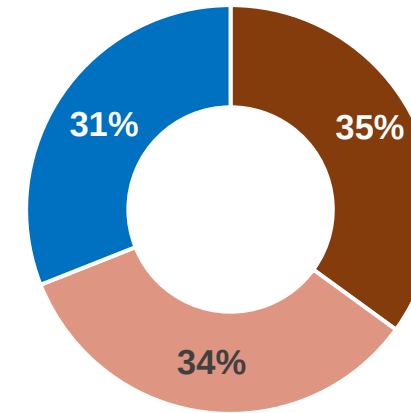
Indoor attractions



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

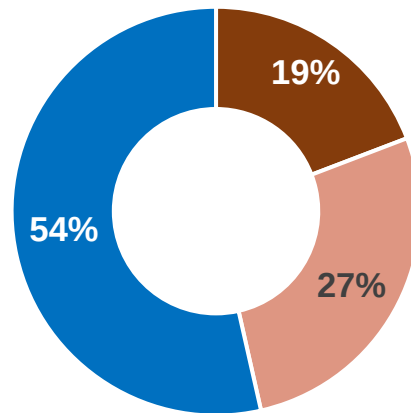
Want vaccine proof	
Wave 8	Wave 9
70%	61%

Indoor events e.g. concerts, talks



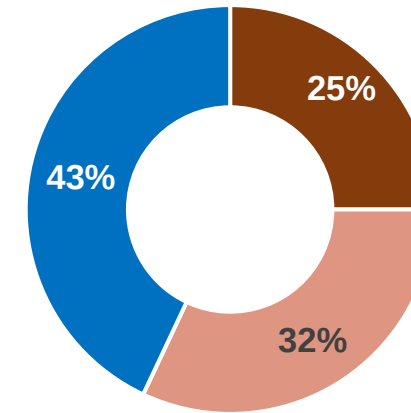
Want vaccine proof	
Wave 8	Wave 9
71%	69%

Outdoor attractions



Want vaccine proof	
Wave 8	Wave 9
53%	46%

Outdoor events e.g. concerts, festivals



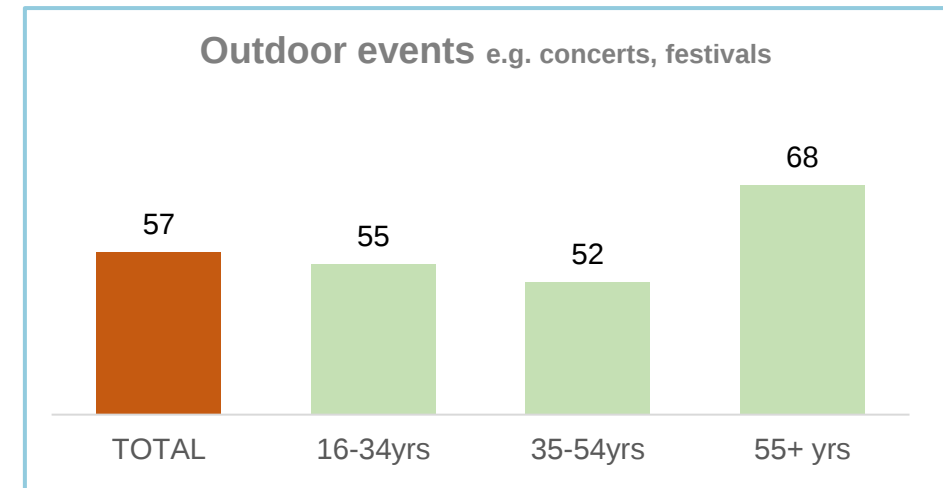
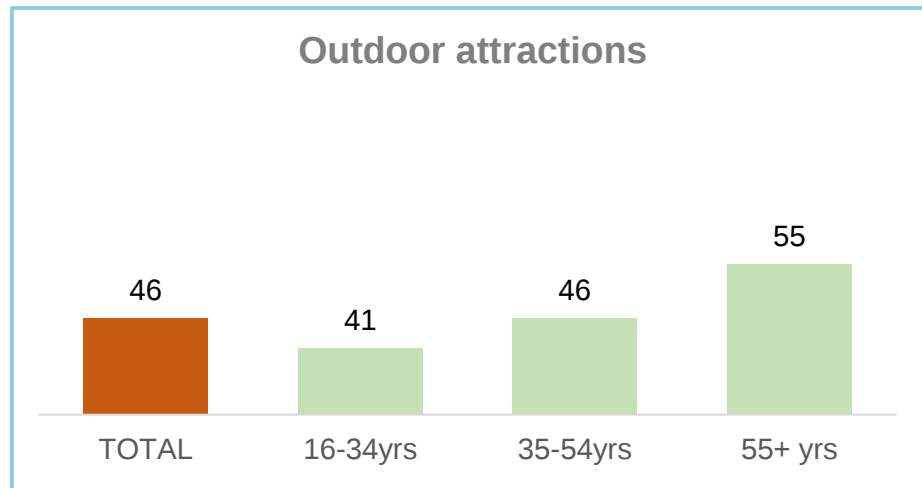
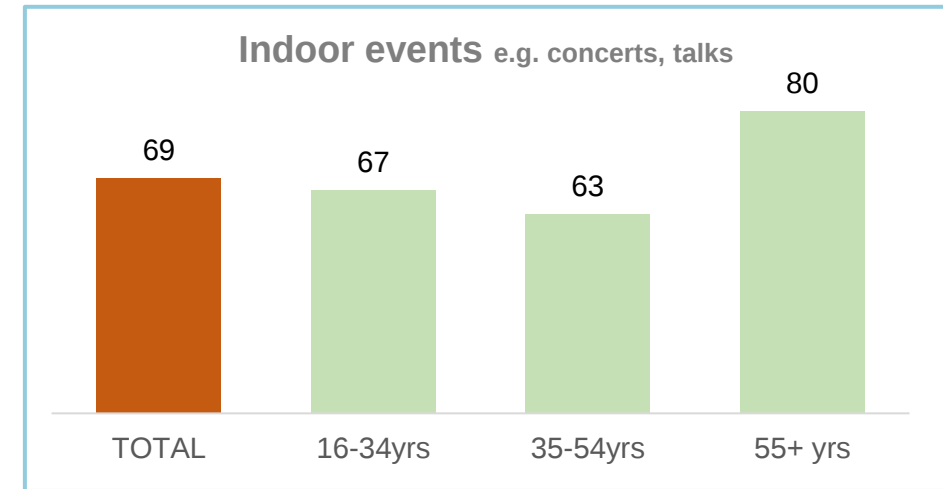
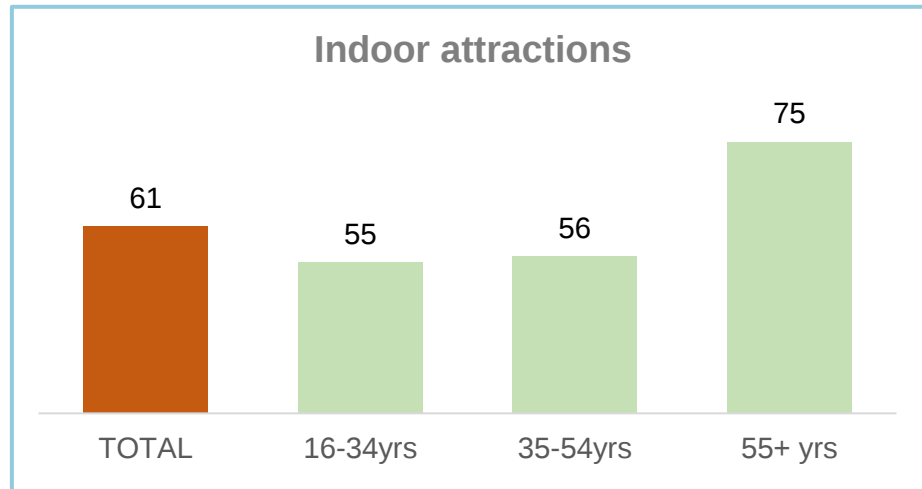
Want vaccine proof	
Wave 8	Wave 9
63%	57%

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 9

The over 55s are staunch in their support for some form of vaccination proof. Preference has waned somewhat since end April among younger age groups, although over half are still in favour for indoor venues

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

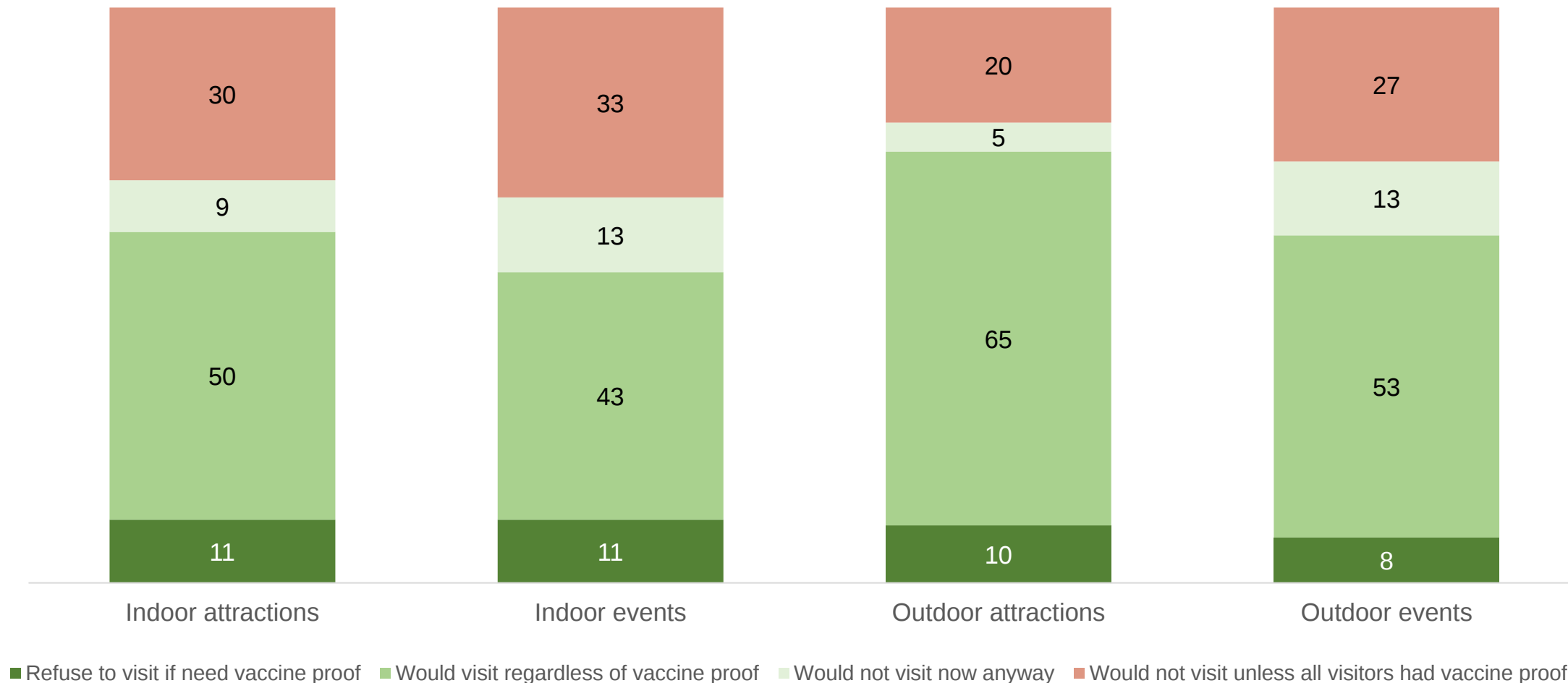


Q: Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes your attitude towards using some form of proof of vaccination to gain entry to.....

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

Around a third of those who would ordinarily visit indoor attractions/events claim that they would not visit unless all visitors had some form of vaccine proof

Wave 9: Likelihood of visiting if 'proof of vaccination' needed to gain entry to attractions (%)

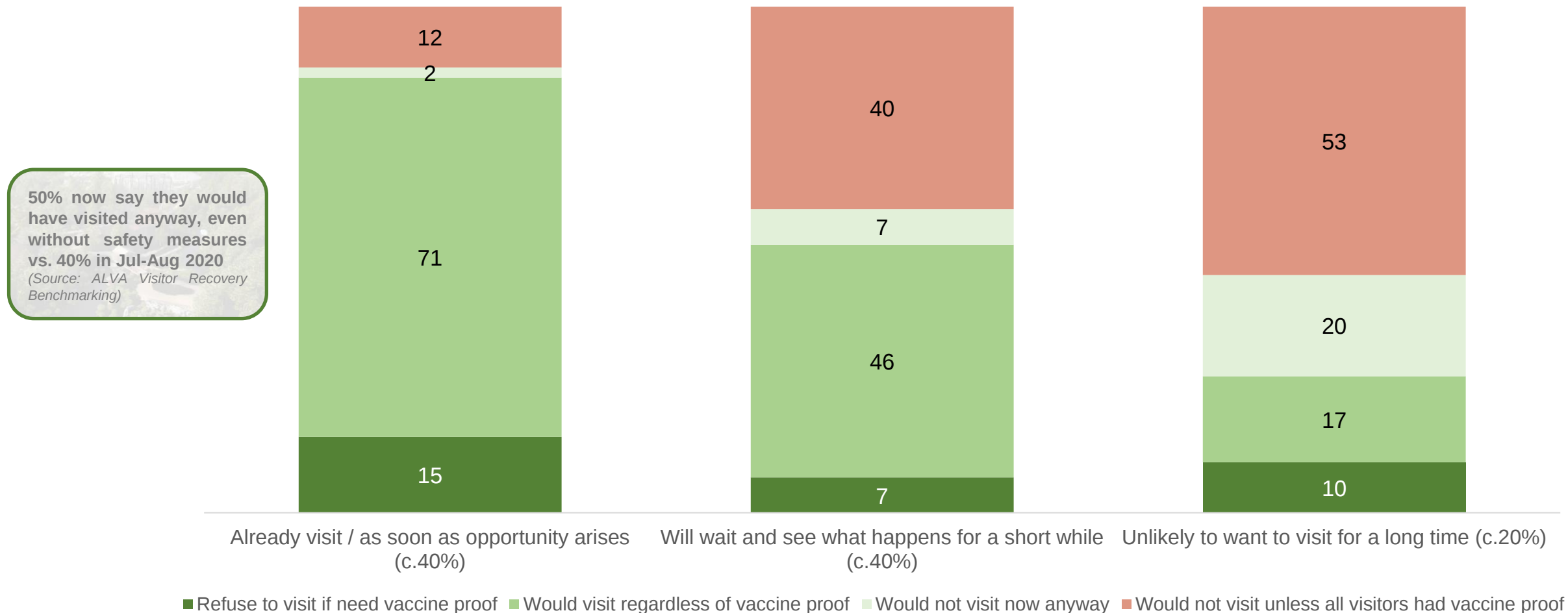


Q: assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes whether or not you would visit each of these types of experience?
Please assume that good Covid-19 safety measures were in place during your visit.

Base: All respondents who tend to go to this type of experience, Wave 9

Evidence indicates that vaccine proof would be a trigger for tempting many from the more cautious segments to return to indoor attractions, but may alienate some current visitors

Wave 9: Likelihood of visiting INDOOR ATTRACTIONS if 'proof of vaccination' needed to gain entry (%)

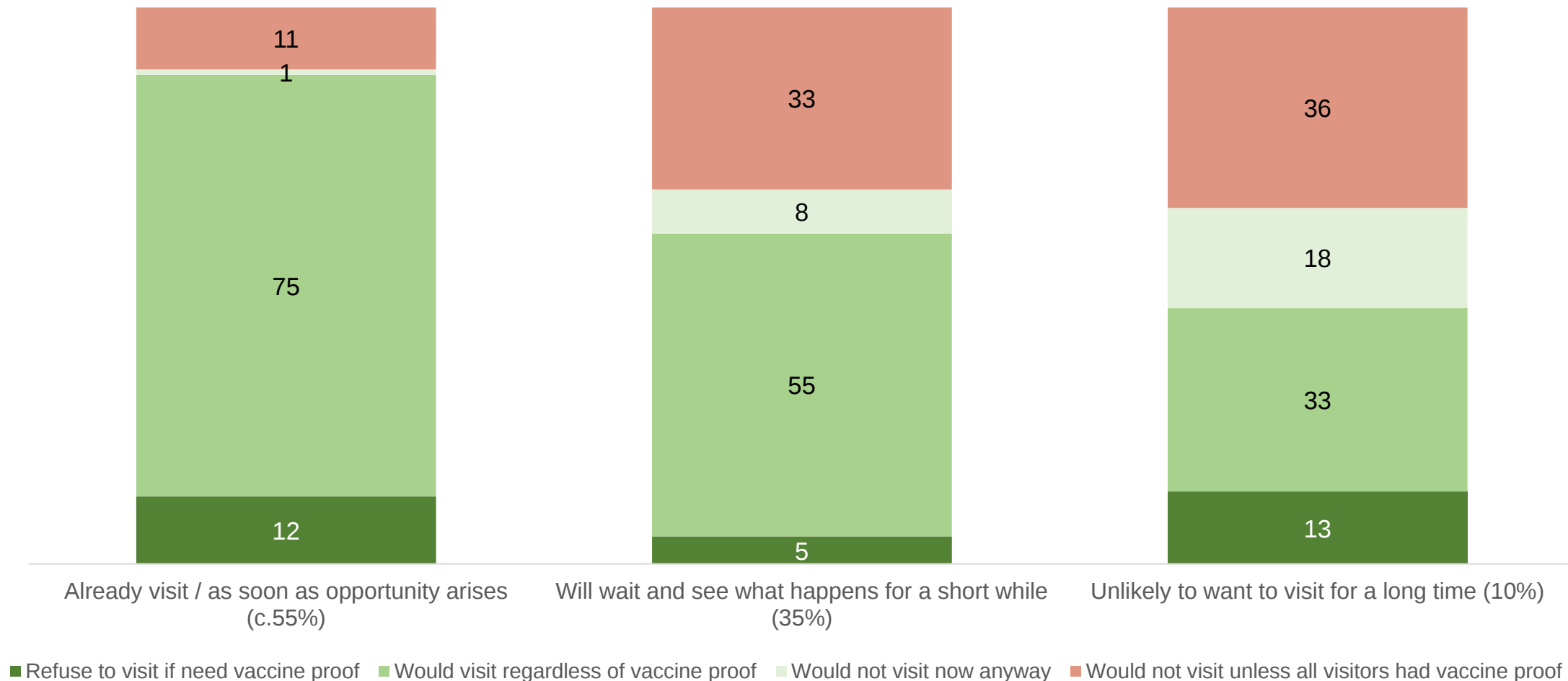


Q: Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes whether or not you would visit each of these types of experience?
Please assume that good Covid-19 safety measures were in place during your visit.

Base: All respondents who tend to go to museums & galleries, Wave 9 (567)

This is less the case for outdoor attractions, although around a third of those from the cautious segments might be tempted to visit by some form of vaccination proof

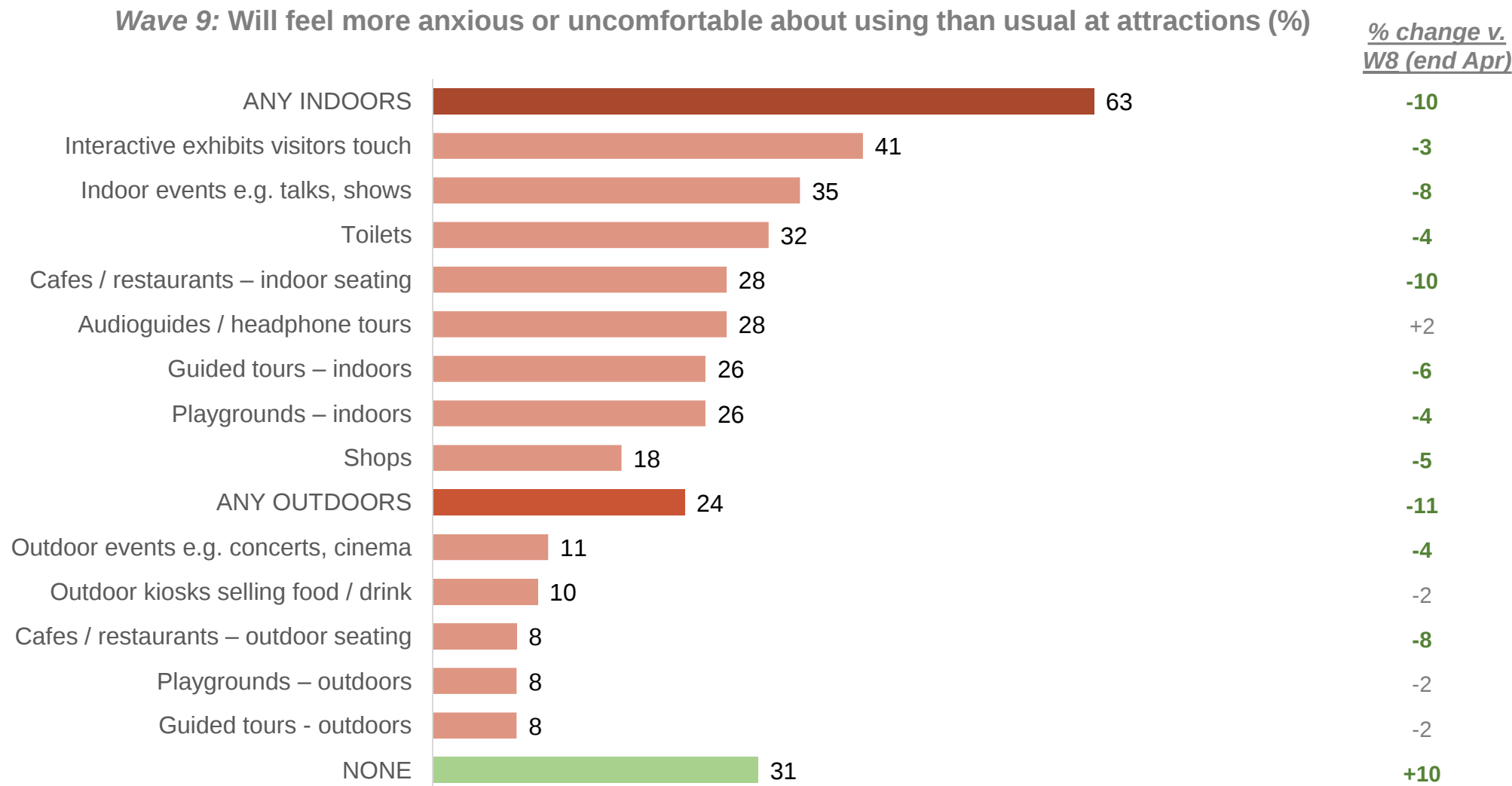
Wave 9: Likelihood of visiting OUTDOOR ATTRACTIONS if 'proof of vaccination' needed to gain entry (%)



Q: Assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes whether or not you would visit each of these types of experience?
Please assume that good Covid-19 safety measures were in place during your visit.

Base: All respondents who tend to go to gardens, Wave 9 (557)

Anxiety around using indoor attraction facilities has decreased rapidly since end April, as the public become reacquainted with everyday activities

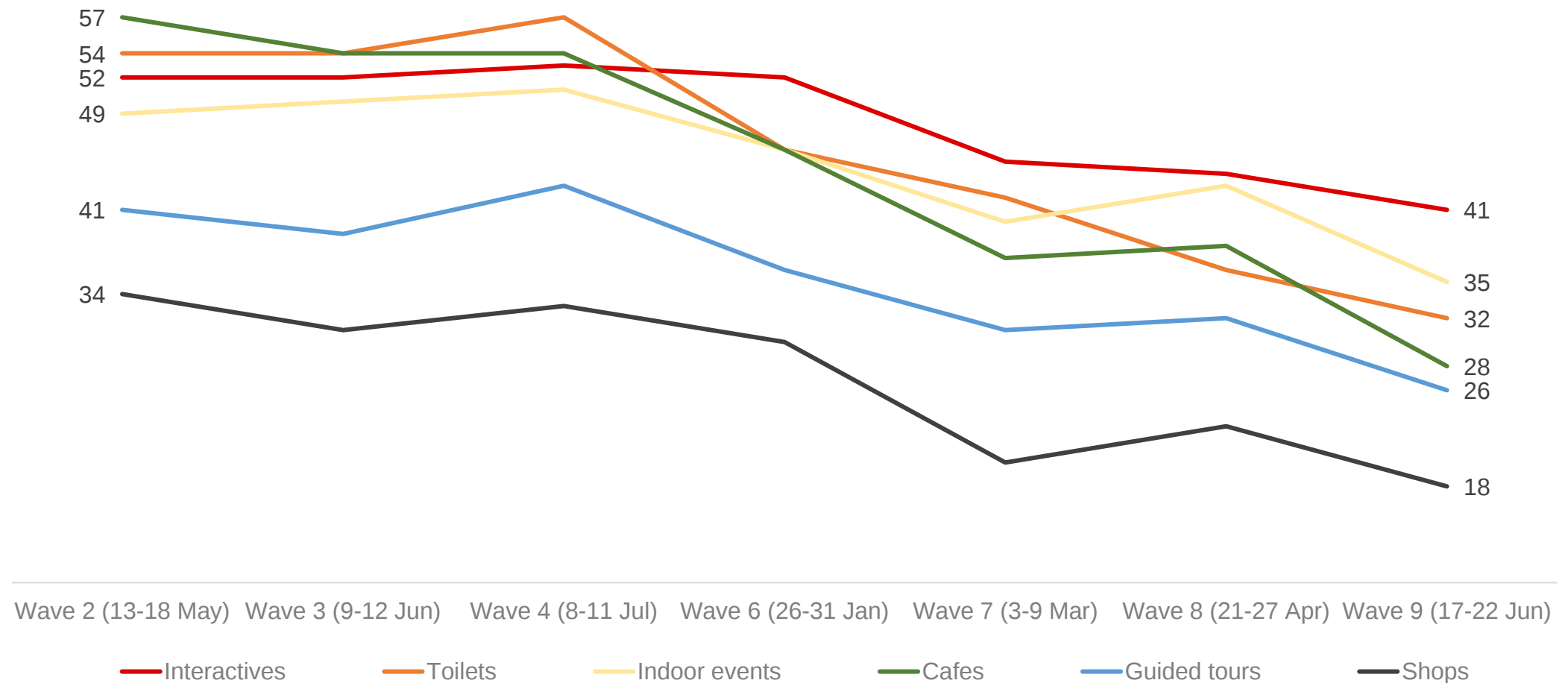


Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual after they have re-opened?

Base: All respondents (Wave 9: 884)

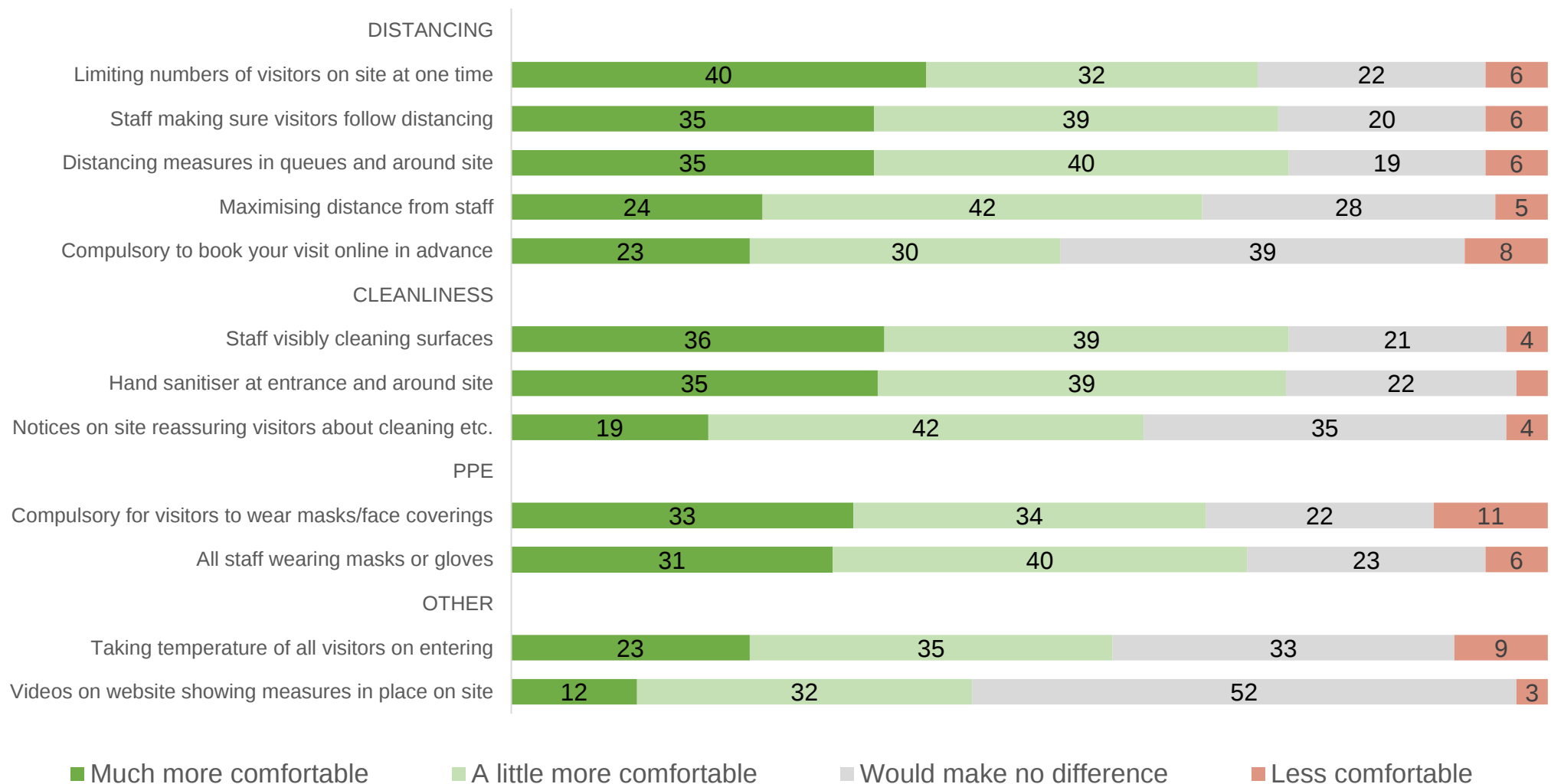
Anxiety around using cafes and toilets has fallen rapidly in recent months, with concerns around interactives and indoor events now the most likely

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

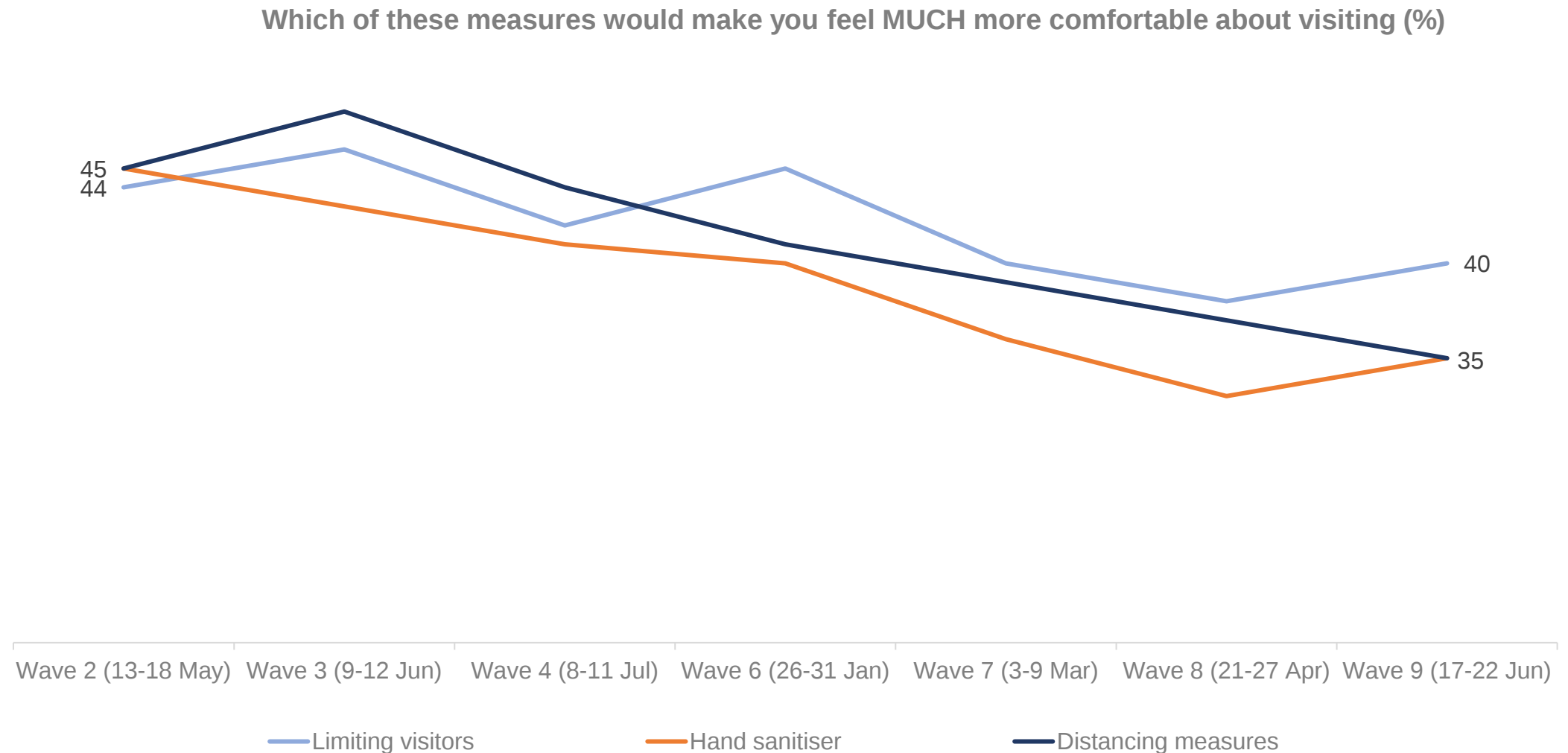


Most safety measures will still be highly comforting to visitors

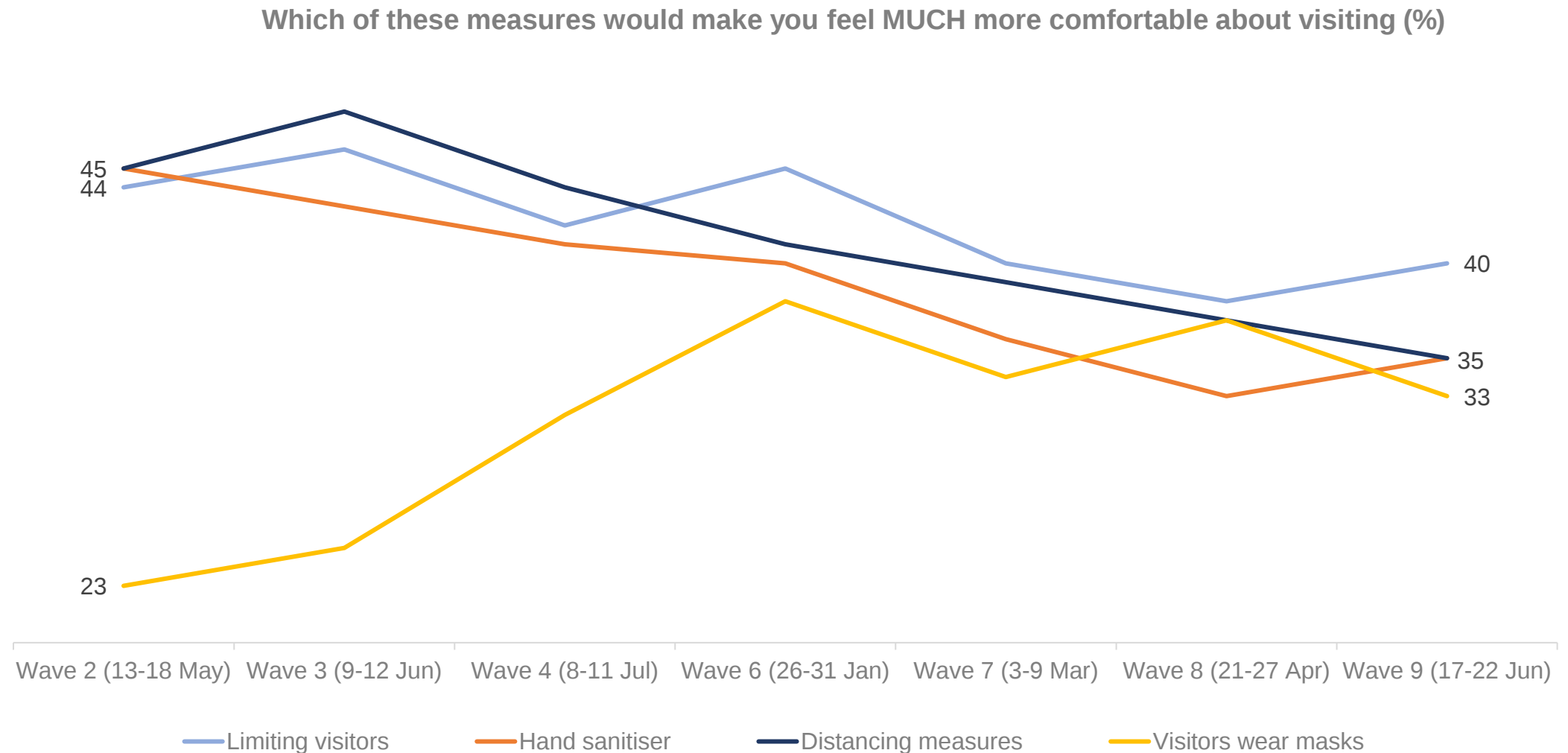
Wave 9: Which of these measures would make you feel more comfortable about visiting (%)



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



Is the positive impact of wearing face coverings also now beginning to wane slightly? 11% now feel that face coverings make them feel less comfortable about visiting





Key take-outs

ALVA



Key take-outs *(Wave 9: 17-22 June)*

Since late April, there has been another positive shift in appetite for visiting attractions when they re-open. In particular, some of those 'waiting to see what happens for a short while' are now ready to visit, although this hesitant group still represents around 40% of the market

Appetite for visiting has continued to grow across all age groups, in the South of England, Wales and Scotland, although it has stalled elsewhere in England – particularly the North West

Although confidence is clearly growing and anxiety around using facilities falling, 60% still express fear or concerns about visiting – especially on measures to limit crowds / keep distancing. Three-quarters of the attractions-visiting public are not yet ready to remove Covid-19 safety measures, the same as at end April

Although falling slightly since end April, there remains notable support for some form of 'proof of vaccination / exemption', especially for indoor venues and among the over 55s, once the vaccine has been fully rolled out. Around a third of those who would ordinarily visit indoor attractions/events claim that they would not visit unless all visitors had some form of vaccine proof

Evidence indicates that vaccine proof would be a trigger for tempting many from the more cautious segments to return to indoor attractions, but may alienate some current visitors

There has been a strong positive step change in national confidence around use of public transport since late April, following the slight regression in confidence in the month prior to this

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?

- 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 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 different 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, 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. 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?

- 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 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

Questionnaire: Wave 9 (17-21 Jun 2021)

ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE – WAVE 9

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 after attractions re-opened in July last year following the first lockdown? 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?
- Yes
 - No, but I will take it when offered
 - No and I will not take it
 - Prefer not to say
- Q5a. 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 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
- Q5al. And 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:
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

- 1 -

LIST OF VENUES FOR Q5Al:
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

- 2 -

- ASK Q7c UNLESS SAY 'DON'T TEND TO VISIT EXPERIENCE' AT Q7c
Q7cl. Again, assuming that a Covid-19 vaccine had been offered to every adult able to have one, which of the following best describes whether or not you would visit each of these types of experience?
Please assume that good Covid-19 safety measures were in place during your visit.
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 not visit unless all visitors had to provide proof of vaccination or proof of exemption from vaccination
I would visit regardless of whether or not visitors had to provide proof of vaccination / exemption
I would refuse to visit if visitors were made to provide proof of vaccination or exemption
I would not visit under any circumstances at the moment 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

- 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

- 3 -