

ALVA Attractions Recovery Tracker

Wave 2

Fieldwork: 13-18 May 2020

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The challenge

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

Helping us to get back on our feet quickly but also to sustain our recovery

Two major practical questions attractions likely to have ahead of re-opening:

- 🕒 How should we physically present ourselves on re-opening to build public trust and confidence in visiting?
- 🕒 What communications messages should we put out there to build confidence and capture the public mood?



How are we generating insights to meet this challenge?

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”

Wave 1: 20-24 April

668 survey responses

Wave 2: 13-18 May

919 survey responses

Announcement of lockdown easing:
England (10 May), NI (18 May), Scotland (18 May),
Lockdown easing begins:
England (13 May), NI (19 May), Scotland (28 May)

Survey responses boosted in.....

**Wales
(to 151)**

**Scotland
(to 104)**



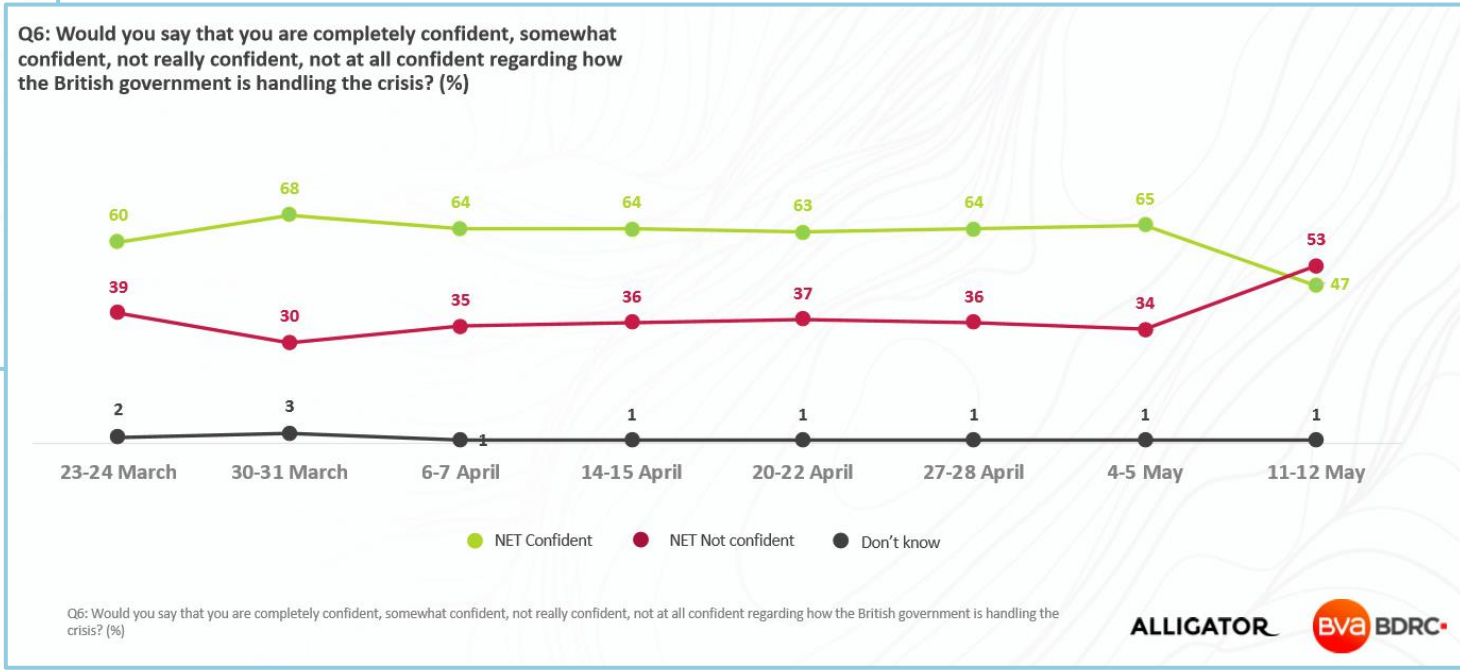
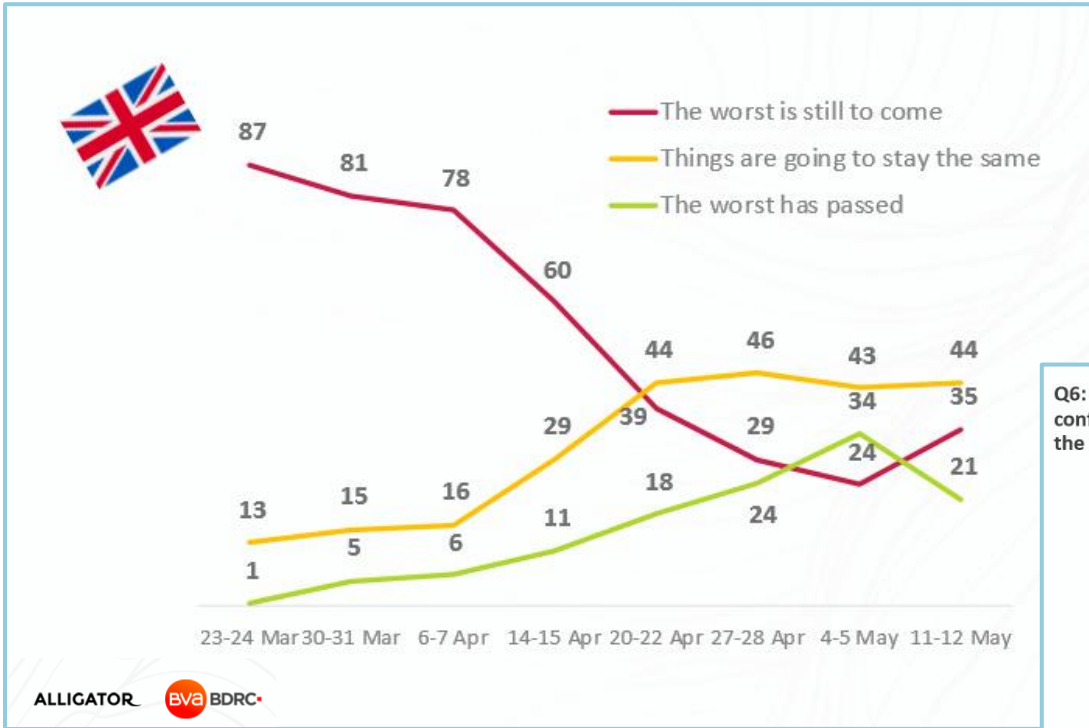
How is the public feeling about visiting attractions?

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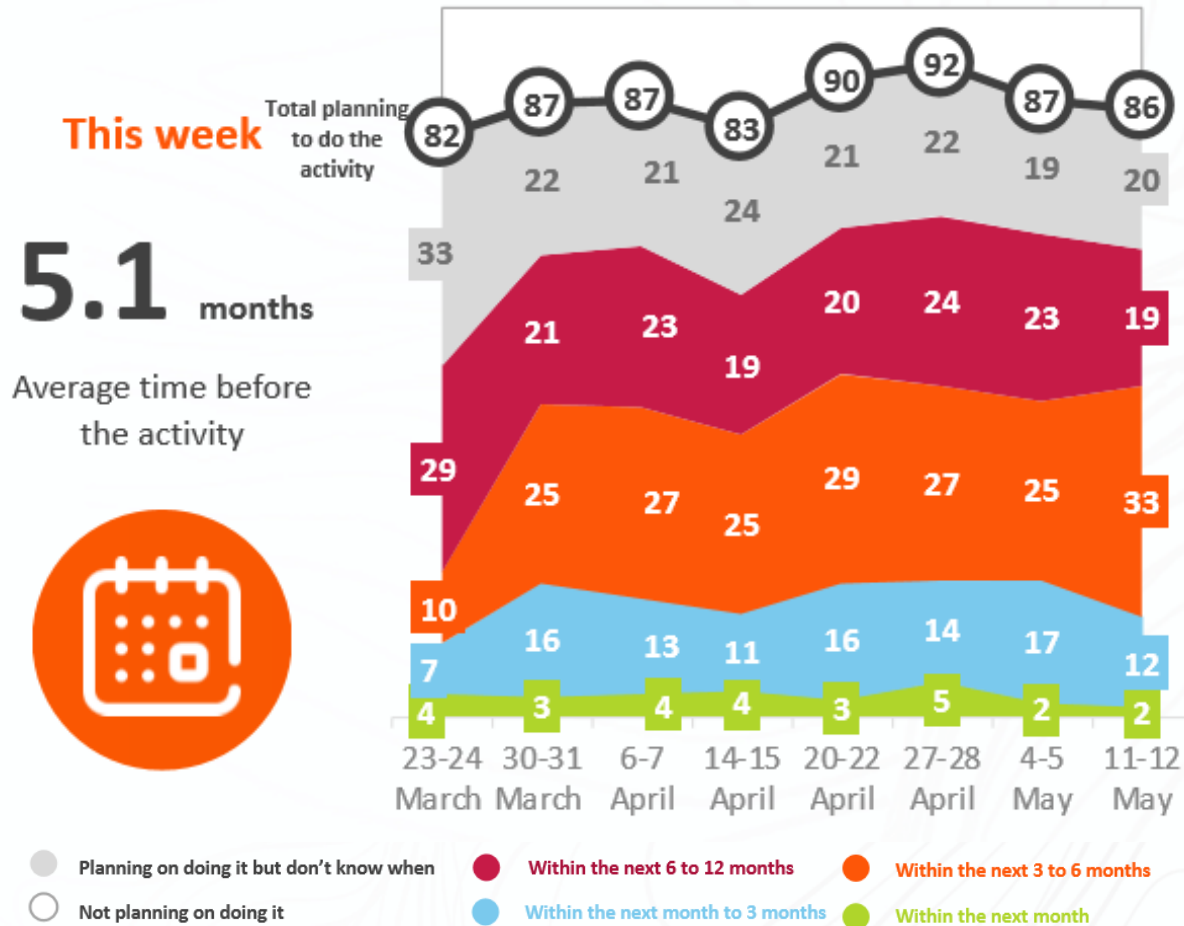
decision
house

Since the announcement of lockdown easing in England, the proportion of the public feeling the worst is still to come has increased. Trust in government's handling of the crisis has also fallen



There has been a corresponding fall in the proportion of the population anticipating a visit to an attraction within the next three months. This drop in confidence is repeated across other leisure sectors as a return to normality is pushed further away in people's minds

Go on a day out to a visitor attraction



Perhaps concern that lockdown being eased too quickly?
Or perhaps naming aspirational dates for re-opening has brought home some realities around visiting?

Q11. Which the following are you intending to do in the next 2 weeks combined with Q12. Given what you know today, when do you anticipate doing the following? Base all

There has been a corresponding increase in caution over visiting attractions as soon as the opportunity arises after re-opening – especially indoor attractions

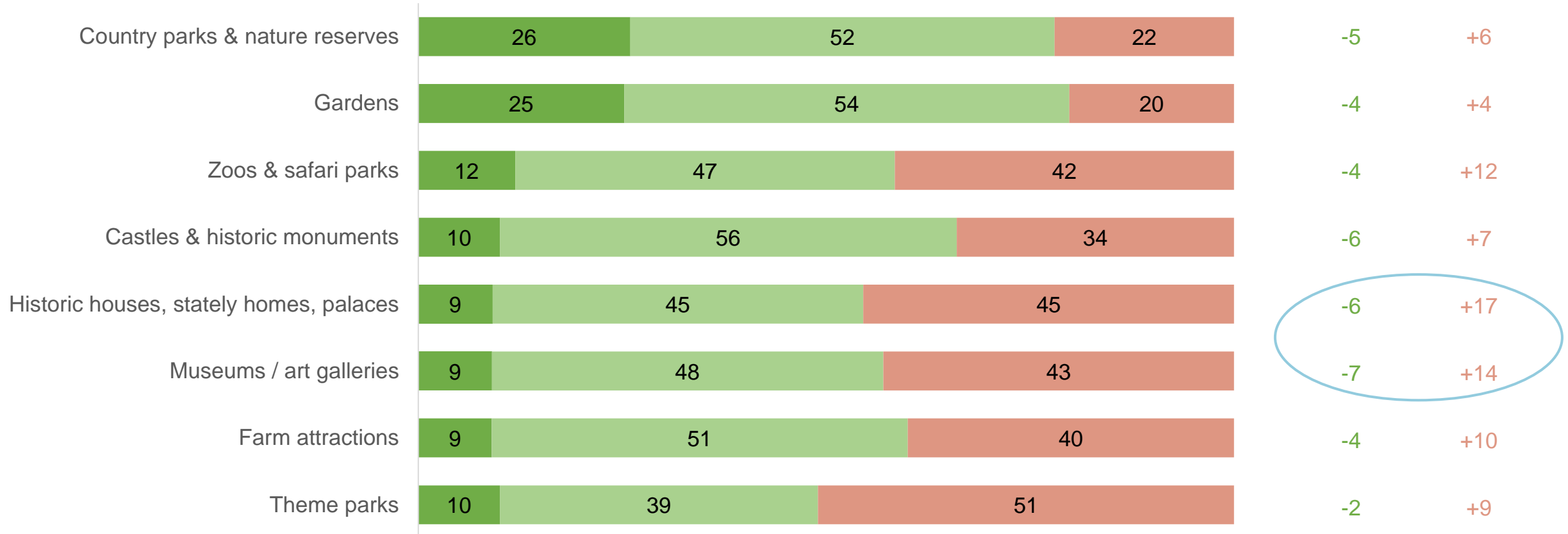
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Wave 2: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)

% change vs. Wave 1

As soon as opp. arises Unlikely for long time



■ As soon as opportunity arises ■ Will wait and see what happens for short while ■ Unlikely to want to visit for a long time

Caution is still primarily driven by **perceptions of crowds** and whether an attraction is **able to maintain distancing**

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14% fear of crowds, overcrowding, too many visitors, too busy
(18% at Wave 1)

I am worried that there will be crowds of people, which will allow the spread of germs and viruses.

Hope loads of people don't go all at once. Anxiety is that too many people will go all at once

I wouldn't want to visit crowded attractions for some time because it would be asking for trouble. I'm 71 years old so I'm classed as vulnerable and I would be silly if I disregarded that evaluation.

Will wait after they open until things settle more as I'm concerned about lots of people in one place

18% concern over / mention of need for distancing
(12% at Wave 1)

I'd hope to have the chance to see new places and get inspiration. I worry that it will be impossible to fulfil SD requirements - public don't seem to 'get it' and shops etc are simply not 'policing' these. I doubt attractions will be any different.

I hope that when they do re-open they will have safe distancing rules and we can actually visit and feel safe.

No worries but I would check their policy on social distancing first

But people are becoming more specific on their expression of fears around visiting and on what measures they expect from attractions when they re-open

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Reducing capacity / pre-booking only / queuing concerns

I would rather tickets are dated and timed so numbers can be restricted, so social distancing can be maintained while it's still needed.

Will be concerned about queues and not being able to stop and look at things

They need to sell tickets beforehand to limit the number of people so social distancing can still be achieved, unless they are open spaces where the limits can be observed

Concern with touching things

I don't like anyone being within my personal space, I have a personal bubble which is that people need to be at least arms length away from me and I already have a germ phobia or being touched by people. So when they do reopen, it'll be hard for me to walk around freely or be able to touch surfaces without getting paranoid about what could be lurking in the air or if someone has a disease that could be passed into me

I look forward to it but will be worried about touching things and using toilets etc. and social distancing

Cleanliness measures

I would hope that they would provide sanitisation stands and wipe down all surfaces frequently in addition to having social distancing measures in place.

I hope they have plenty hand washing facilities and take more care with hygiene

As long as the local attractions can perform safe spaces between every person and the employees are using hygiene products for the safety of them and the customers, I feel very safe.

Concern with specific facilities

Of concern would be touching things and contamination. Practical things like public toilets and places to eat. Playgrounds for children etc.

Not to happy to go as the cafe and toilet might be an issue.

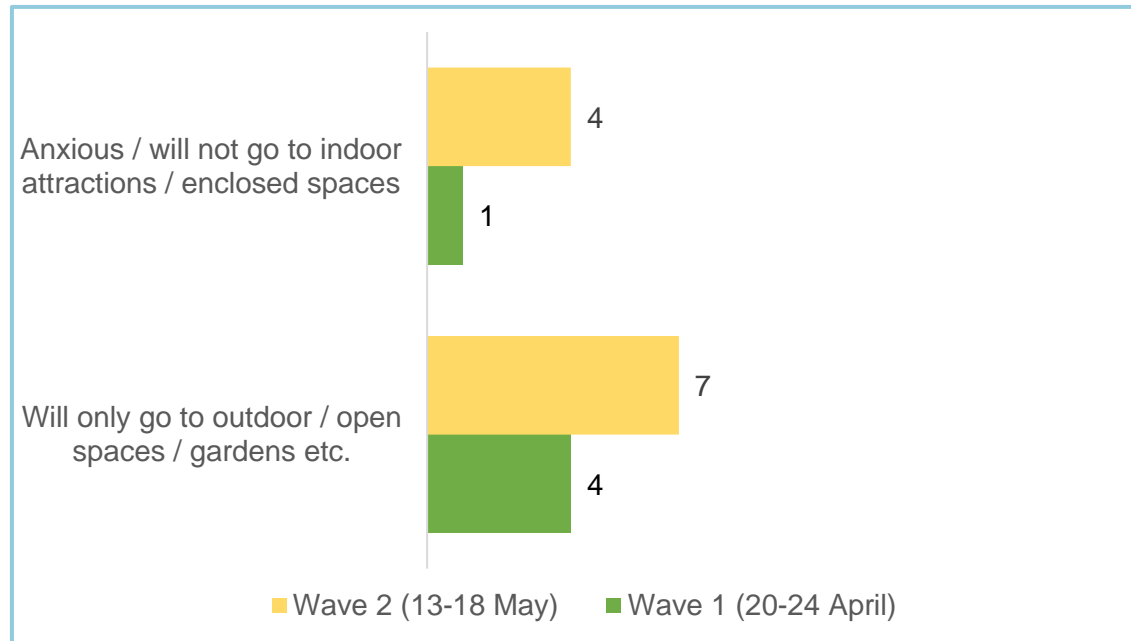
Little concerned regarding the levels of people about, toilets, food areas etc

The gap in caution between attractions perceived as providing (outdoor) open space and (indoor) enclosed space is increasing

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How currently feeling about visiting attractions when they re-open: spontaneous mentions (%)



I probably wouldn't visit indoor attractions for a while even after the reopen as I'd be too worried but I would be happy to go to outdoor attractions as I think the chance of catching anything is less outdoors

Looking forward to the reopening of parks & gardens, like National Trust properties & quite confident in that they are open spaces. I'm more reluctant to visit museums, galleries, etc in enclosed spaces, where distancing would be difficult, so I will still avoid them.

I will be ok probably in open air things like castles and gardens and places where almost no one goes Like art galleries, but not inside museums and busy libraries

Would be still worried about museums being inside where there are more potential risks

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

Base: All respondents, Wave 2 (760)

Although the proportion of the public who are confident to return straight away has fallen, it is still the most frequent attraction visitors, including Members who will return first

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**36% of the market will visit at least one attraction type
'AS SOON AS THE OPPORTUNITY ARISES' after re-opening**



**48% among
most frequent
attraction visitors
(8+ visits per year)**



**47% among
Members**

Q: Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open?

Bases: All respondents Wave 2, excl. region boosts (760)

This increase in caution has removed the differences in visit confidence by age seen in Wave 1 (20-24 April). However, older people are still as confident about a quick return as others

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Wave 2: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open?
(% 'as soon as opportunity arises')

AS SOON AS OPPORTUNITY ARISES (%)	TOTAL	Aged under 35	Aged 35-54	Aged 55 or over
Country parks & nature reserves	26	29	25	24
Gardens	25	28	22	26
Zoos & safari parks	12	13	12	11
Castles & historic monuments	10	9	11	10
Historic houses, stately homes, palaces	9	9	10	9
Museums / art galleries	9	9	9	10
Farm attractions	9	9	8	7
Theme parks	10	10	10	7

Silver Travel Advisor Coronavirus Survey highlights the continued desire for new experiences among older people

Has COVID-19 made you reassess your holiday priorities?



Source:

May 2020 Coronavirus Survey Findings

Over 800 travellers, 79% aged 60-80, completed an online survey between 15-30 April 2020 on how coronavirus had impacted their travel plans and future intentions.

Four Types of Future Traveller

Looking at the responses in detail, four clear typologies emerge of how older travellers are responding to the Coronavirus outbreak:



The Nesters

These are the stay-at-home people, mainly in the vulnerable category, who prefer to await a vaccine or other medical protection; and other than for day trips (perhaps), they don't really want to travel at all.



The Belt & Bracers

This cautious group want all the facts before they'll look to travel again. They want to know the clear protocols for social distancing, hygiene, screening and health & safety. And then they will book, provided they have reassurance on the protection of their money, cancellation conditions, repatriation plans and comprehensive travel insurance.



The Believers

Trust is key for these optimistic travellers who have faith that the companies who have looked after them well, or who have been personally recommended, will get it right. They want to enjoy holidays in the same spirit as they have done in the past although they are very aware that things may not be quite the same as before.



The Avengers

This group feel they have lost months of their lives as well as their travel plans because of the virus and they want to get out as soon as they can in the diminishing number of years in good health they have left. The lockdown has only enhanced their wanderlust. Tempus fugit!



The Silver Travel Advisor
Coronavirus Survey Findings
May 2020

Reflecting the publicised reduction in infection rates in the capital, Londoners' confidence has even grown for some attraction types. Confidence among those with children has taken a knock

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HOW SOON do you think it will be before you visit each of these types of attraction after they re-open?
(% 'as soon as opportunity arises')

LONDONERS

AS SOON AS OPPORTUNITY ARISES (%)	% change vs. Wave 1
Country parks & nature reserves	+6
Gardens	+3
Zoos & safari parks	-7
Castles & historic monuments	+4
Historic houses, stately homes, palaces	-1
Museums / art galleries	-3
Farm attractions	-4
Theme parks	-1

CHILDREN UNDER 16 AT HOME

AS SOON AS OPPORTUNITY ARISES (%)	% change vs. Wave 1
Country parks & nature reserves	-9
Gardens	-6
Zoos & safari parks	-8
Castles & historic monuments	-4
Historic houses, stately homes, palaces	-3
Museums / art galleries	-5
Farm attractions	-5
Theme parks	-4

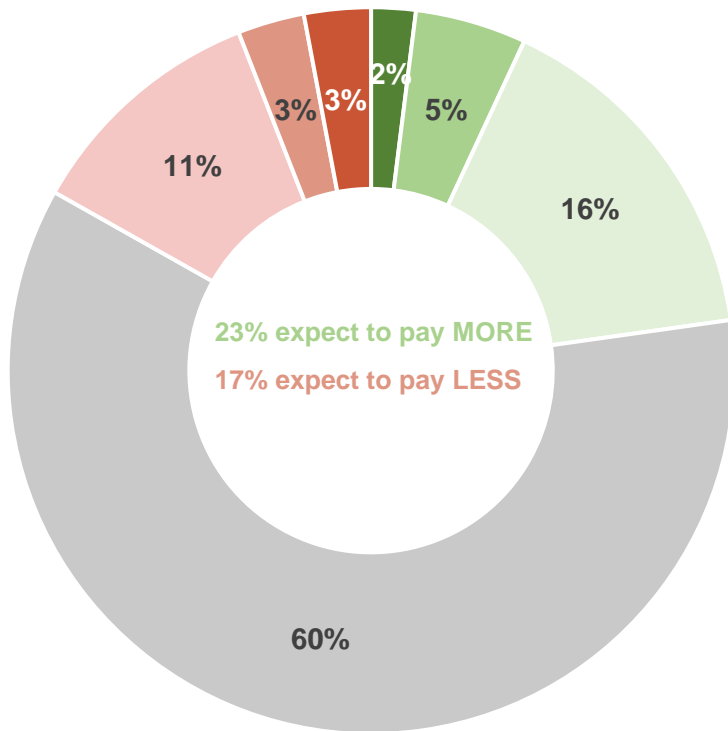
Visitors are not expecting blanket admissions price discounting on re-opening, with members, young people and families most likely to expect to pay more

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Wave 2: When attractions re-open, what is your opinion of how much you would expect to pay to enter the attractions you visit compared to before the Coronavirus outbreak?

- 7 - MORE to enter the attractions I visit
- 6
- 5
- 4 - ABOUT THE SAME as before
- 3
- 2
- 1 - LESS to enter the attractions I visit



Who is expecting to pay more?

'Members': 33% expect to pay more

Frequent visitors to each attraction type

Young people: 31% of 16-34s expect to pay more

Families: 27% of those with children aged under 16 at home expect to pay more

I will be happy to visit attractions after the lockdown, especially zoos. I want to support the tourism industry in this country and protect our heritage like The National Trust.

Want to get out and about. Want to support local businesses and get them back on their feet.

Hope they have enough cash to keep going, looking forward to then reopening

Q: When attractions re-open, what is your opinion of how much you would expect to pay to enter the attractions you visit compared to before the Coronavirus outbreak?

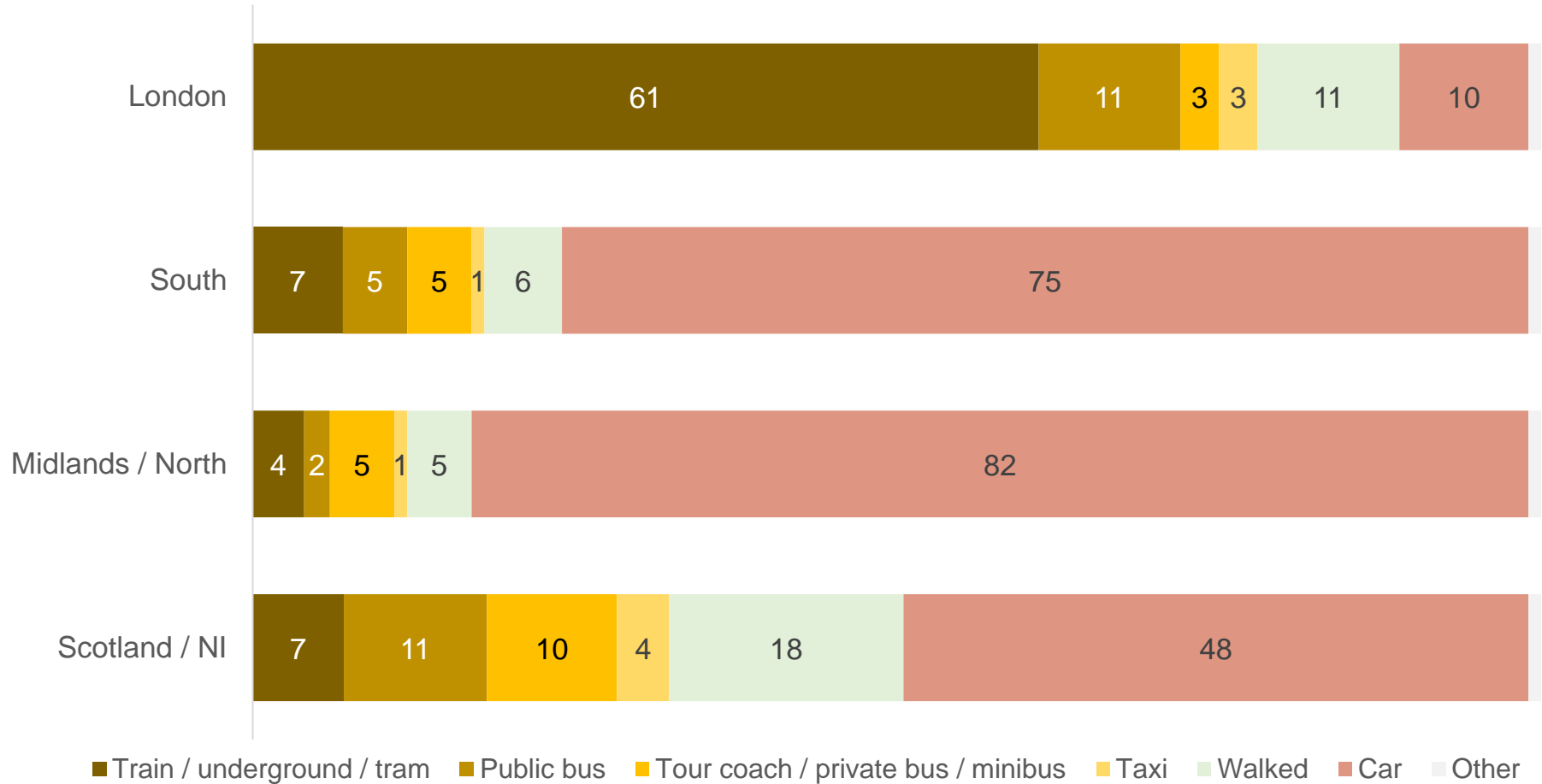
Base: All respondents who ever pay to visit attractions, Wave 2 (746)

Confidence in using public transport will be hugely important to London attractions in particular, and for a minority of mainly urban attractions elsewhere in the UK

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Visitor Experience Benchmarking Survey

What form of transport did you use for the longest part of your journey today? (%)



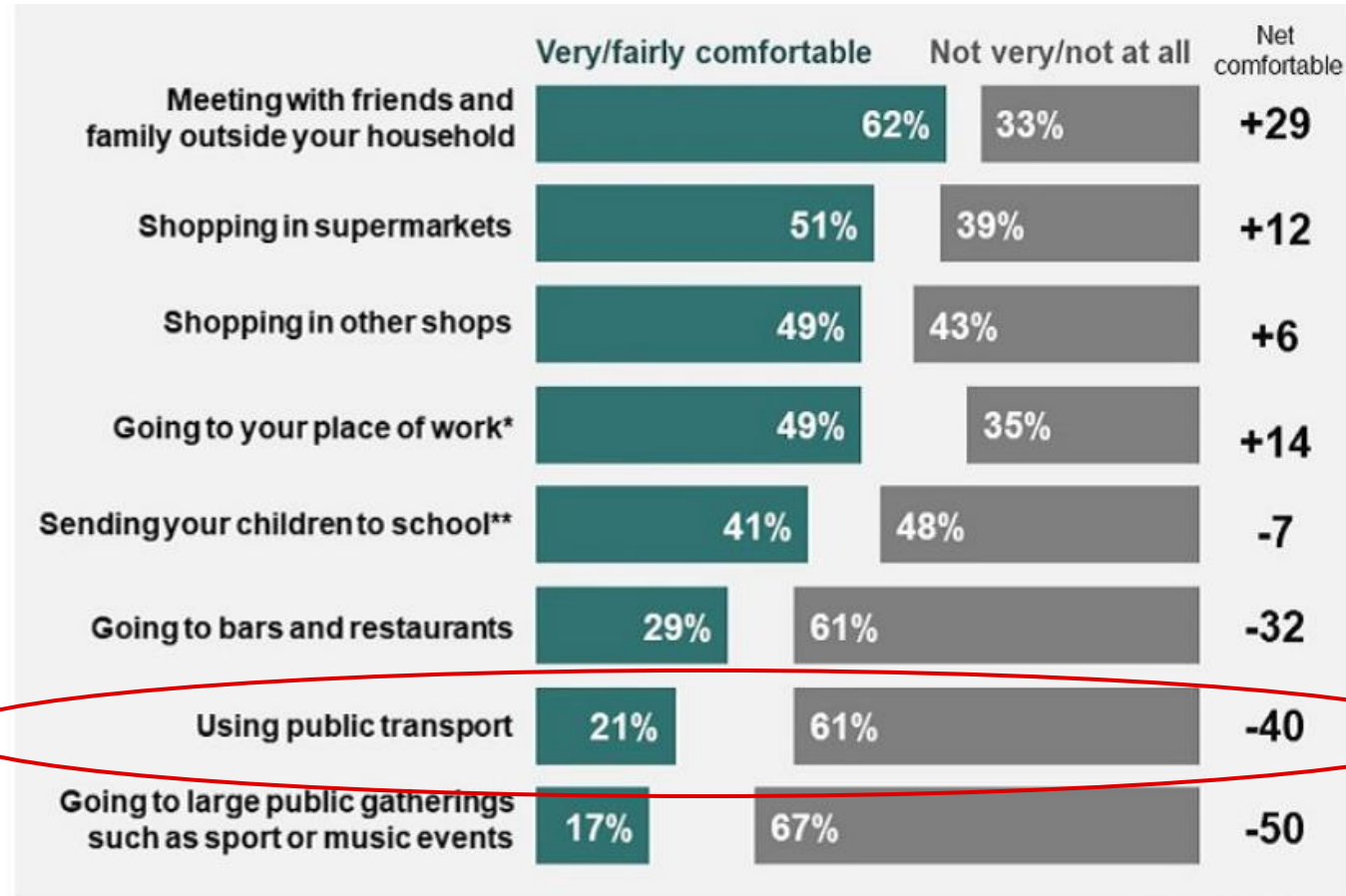
Q: What form of transport did you use for the longest part of your journey today?

Base: All attraction visitors – Spring, Summer, Autumn 2019 (39,088)

Ipsos MORI poll at end April showed a significant lack of comfort in using public transport after the lockdown ends

Comfort of returning to “normality”

Imagine if the lockdown measures end in the next month, how comfortable, if at all, do you think you will feel doing each of the following in the same way as you did before the Coronavirus pandemic began?



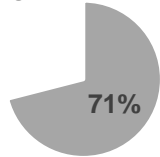
Base: 1,066 Online British adults 18+, 24-27 April 2020
* Only asked to those currently employed (694)
** Only asked to those living with someone aged 17 or under (280)

Source: Ipsos MORI

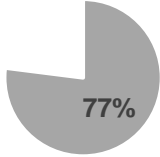
This is reflected when specifically referencing travel to visitor attractions. There is anxiety around using all forms of public transport

% ever use for attns

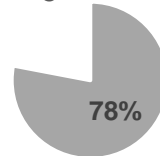
Underground / metro train



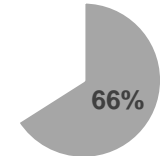
Public bus



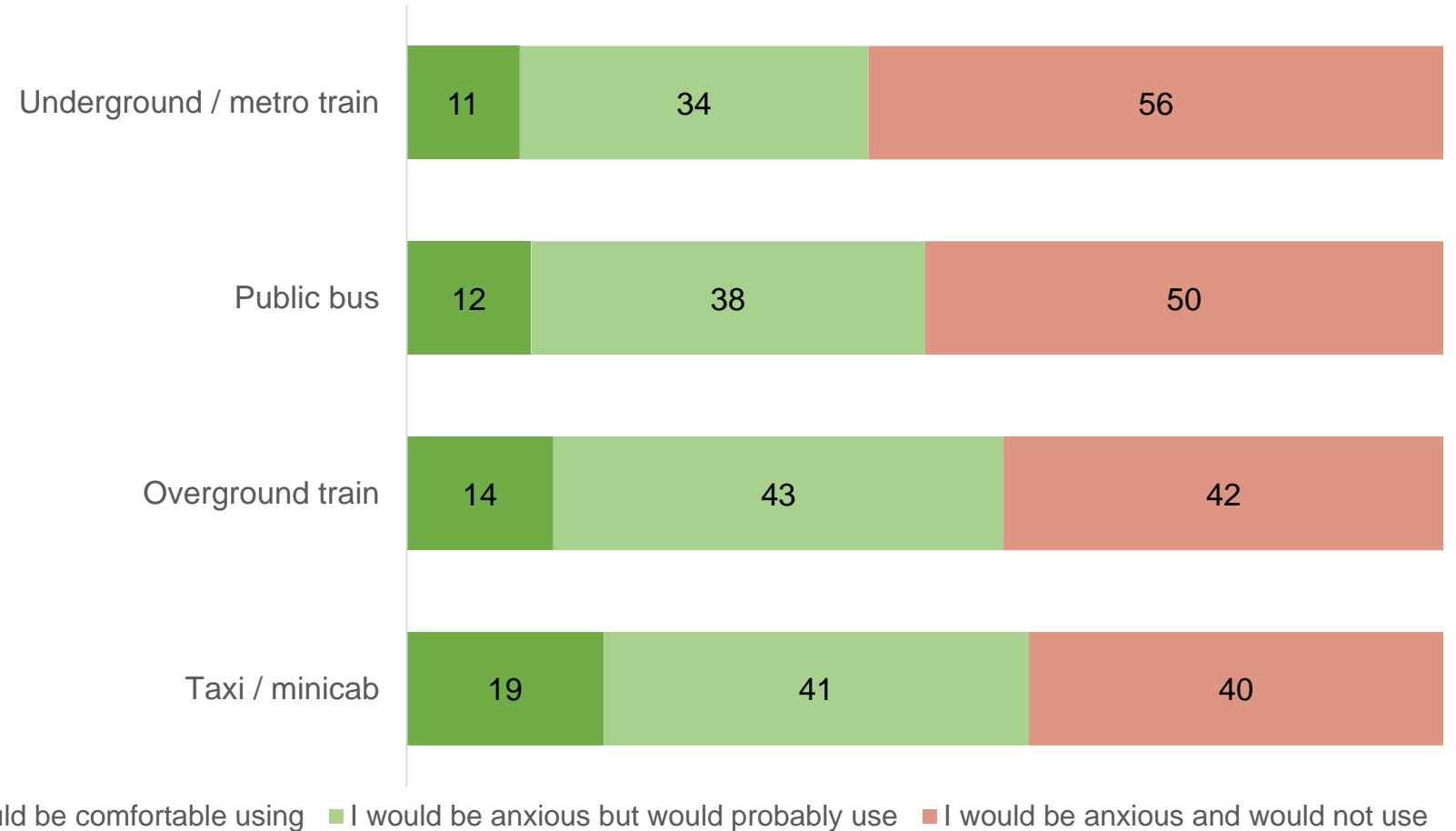
Overground train



Taxi/minicab



Wave 2: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)



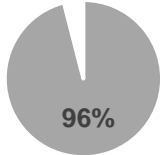
Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open?

Base: All who ever use each form of transport to travel to visitor attractions, Wave 2 – taxi/minicab (501), public bus (585), overground train (593), underground/metro train (540)

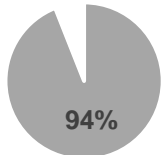
Confidence in using public transport is higher among Londoners (and perhaps residents of other major urban centres), driven by their greater familiarity. But anxiety is still high

% ever use for attns

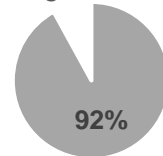
Underground / metro train



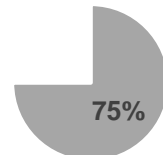
Public bus



Overground train

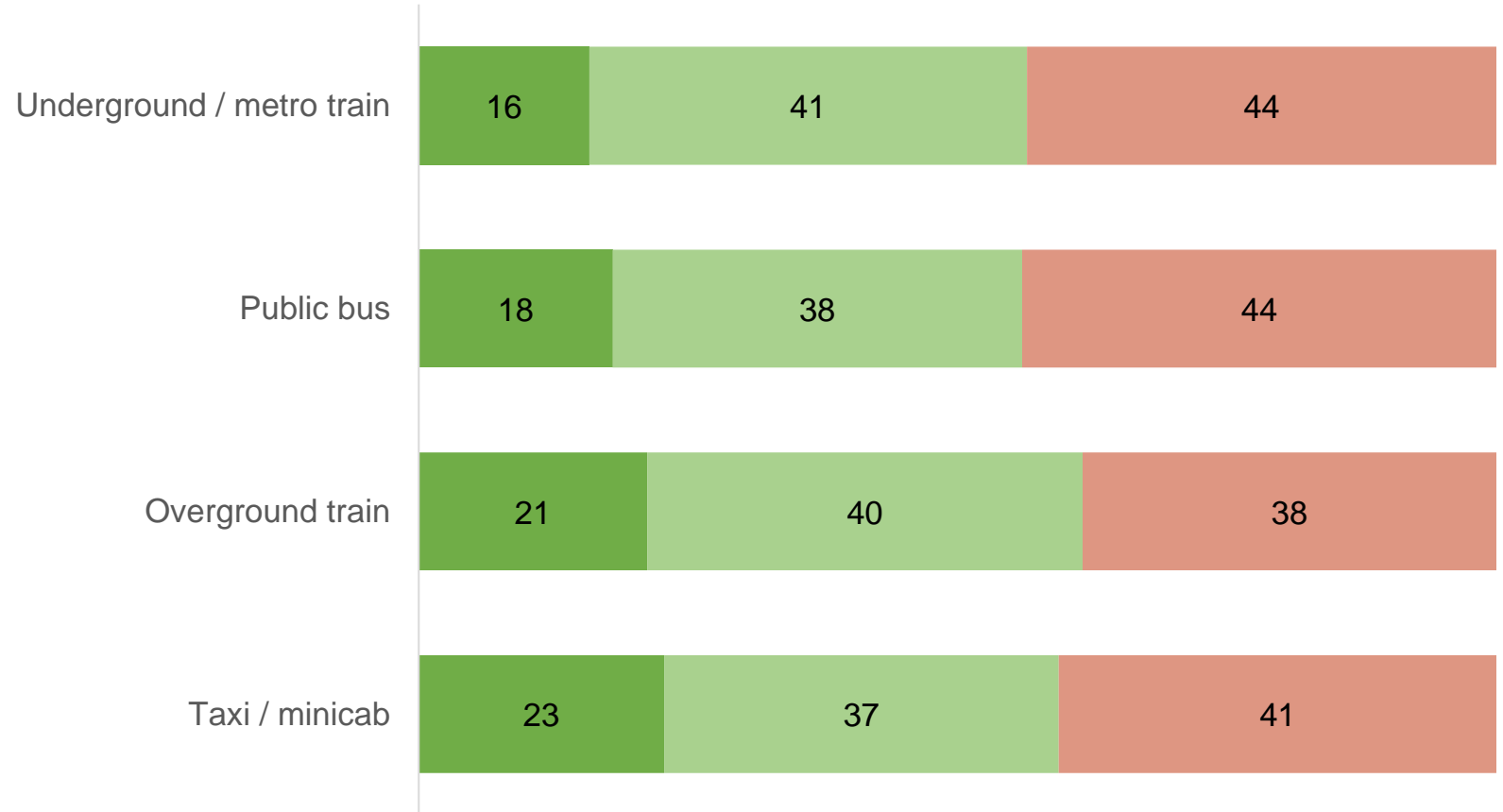


Taxi/minicab



Wave 2: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)

BASE: All living in LONDON (n=102)



■ I would be comfortable using ■ I would be anxious but would probably use ■ I would be anxious and would not use

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 2 – taxi/minicab (77), public bus (96), overground train (94), underground/metro train (98)

How can we build trust and confidence in visiting?

What should we do?

What should we say?

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In addition to becoming more focussed on the measures attractions are expected to have in place, there is an increasing proportion of the public who talk generally about expectations of safety measures and procedures being in place when they visit

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General expectations of safety measures in place

I would feel okay if they started by having certain measures in place

I will be very cautious regarding visits to any attractions, I will check their procedures before I decide whether to visit or not.

I hope that it is possible to visit attractions again before too long, however I will need to be sure that they are safe and well managed places

When attractions re-open I hope they have taken precautions to keep the public safe. Like not allowing the attractions to get too crowded

I would probably put off going straight away once they re-open so they can get safety procedures in place.

Will wait a while to be sure they have got appropriate measures in place

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

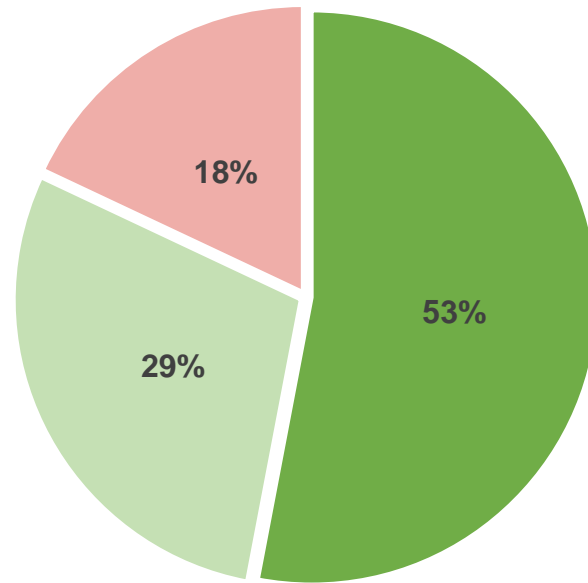
Base: All respondents, Wave 2 (760)

It is therefore not a surprise to see that there is strong evidence that an ‘accreditation certificate’ will have a major positive impact upon visit confidence. Particularly in nudging those most likely to visit over the line

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Wave 2: Impact of an ‘accreditation certificate’ (%)



- It would give me the extra confidence I needed to visit
- I would be confident about visiting anyway
- It would not be enough to give me confidence in visiting

Most positive impact “extra confidence needed to visit”

‘Members’:

57% (64% among National Trust members)

Frequent visitors:

57% among those visiting attractions 5+ times/year

Q: If a visitor attraction you wanted to visit was awarded an ‘accreditation certificate’ which confirmed they had put in place recognised measures to minimise the risk of spreading Coronavirus, how would this make you feel about visiting after it re-opened?

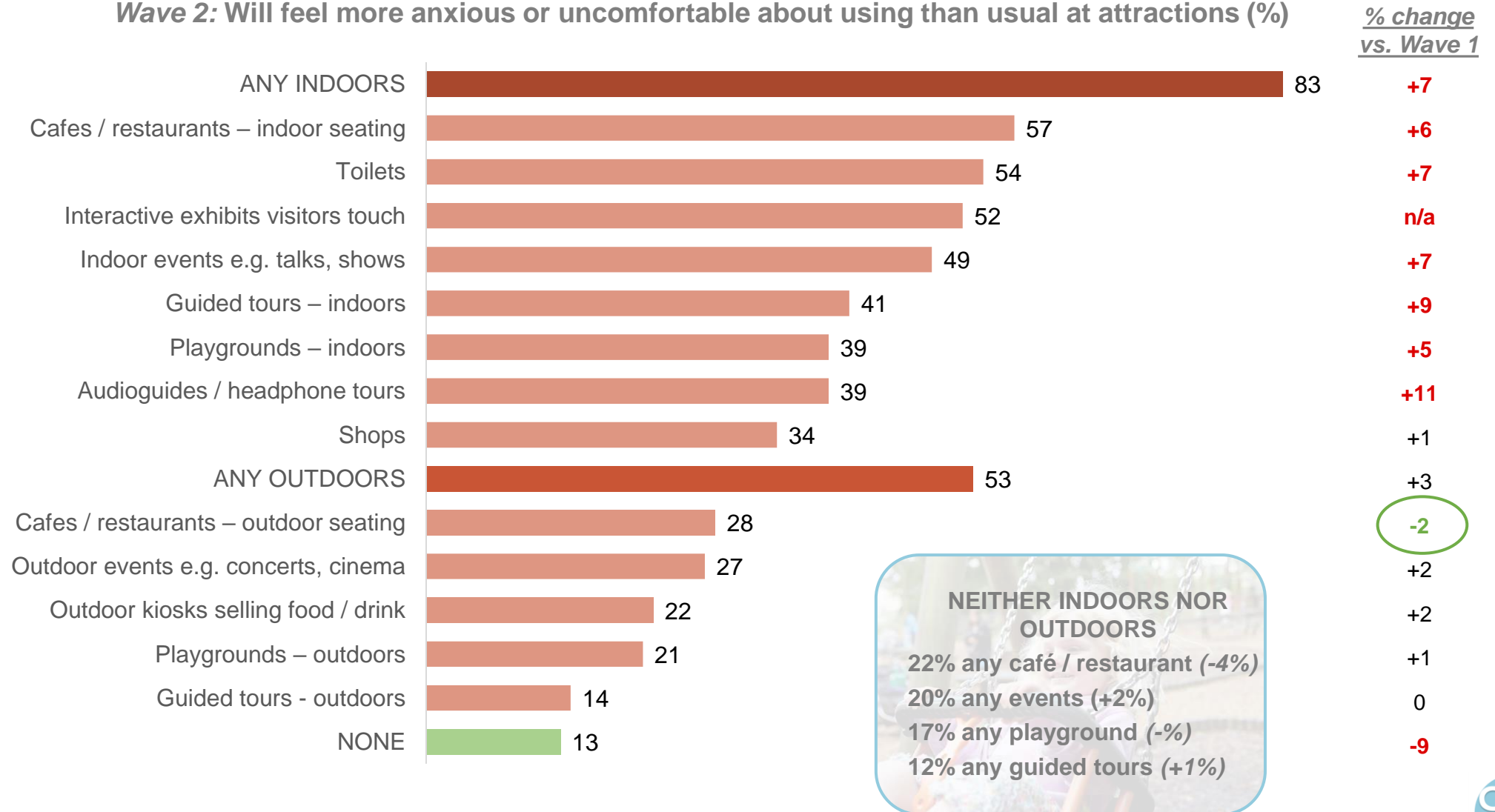
Base: All respondents – Wave 2 (760)

Anxiety around using indoor facilities has increased, as concerns around distancing grow. Some growth in confidence around using outdoor cafés

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Wave 2: Will feel more anxious or uncomfortable about using than usual at attractions (%)



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

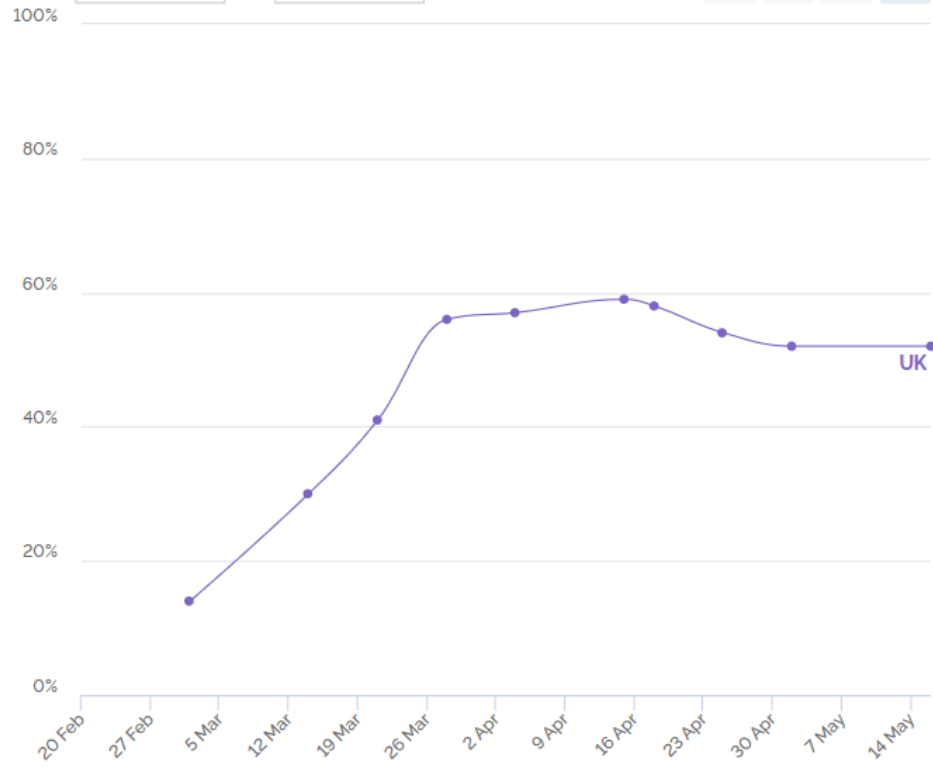
Base: All respondents (Wave 1: 668, Wave 2: 760)

Around half of the UK population currently claim to be avoiding touching objects in public

YouGov COVID-19 behaviour changes tracker: Refraining from touching objects in public

% of people in each country who say they are: Refraining from touching objects in public (e.g. using objects to press lift buttons).

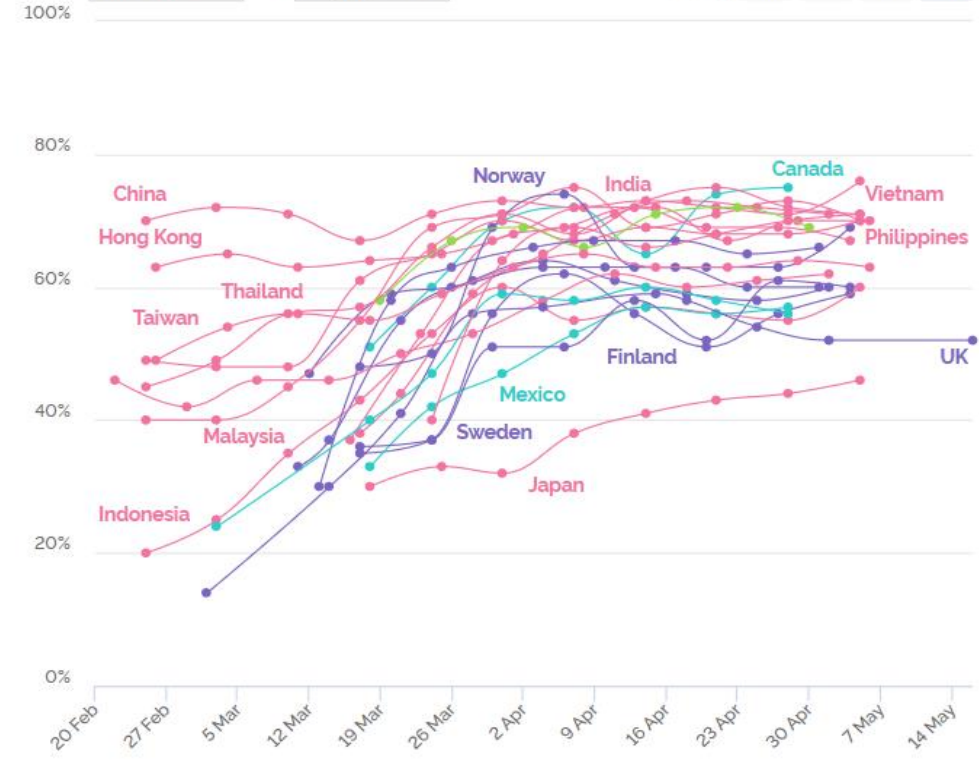
From Feb 20, 2020 To May 16, 2020 Zoom 1m 3m YTD All



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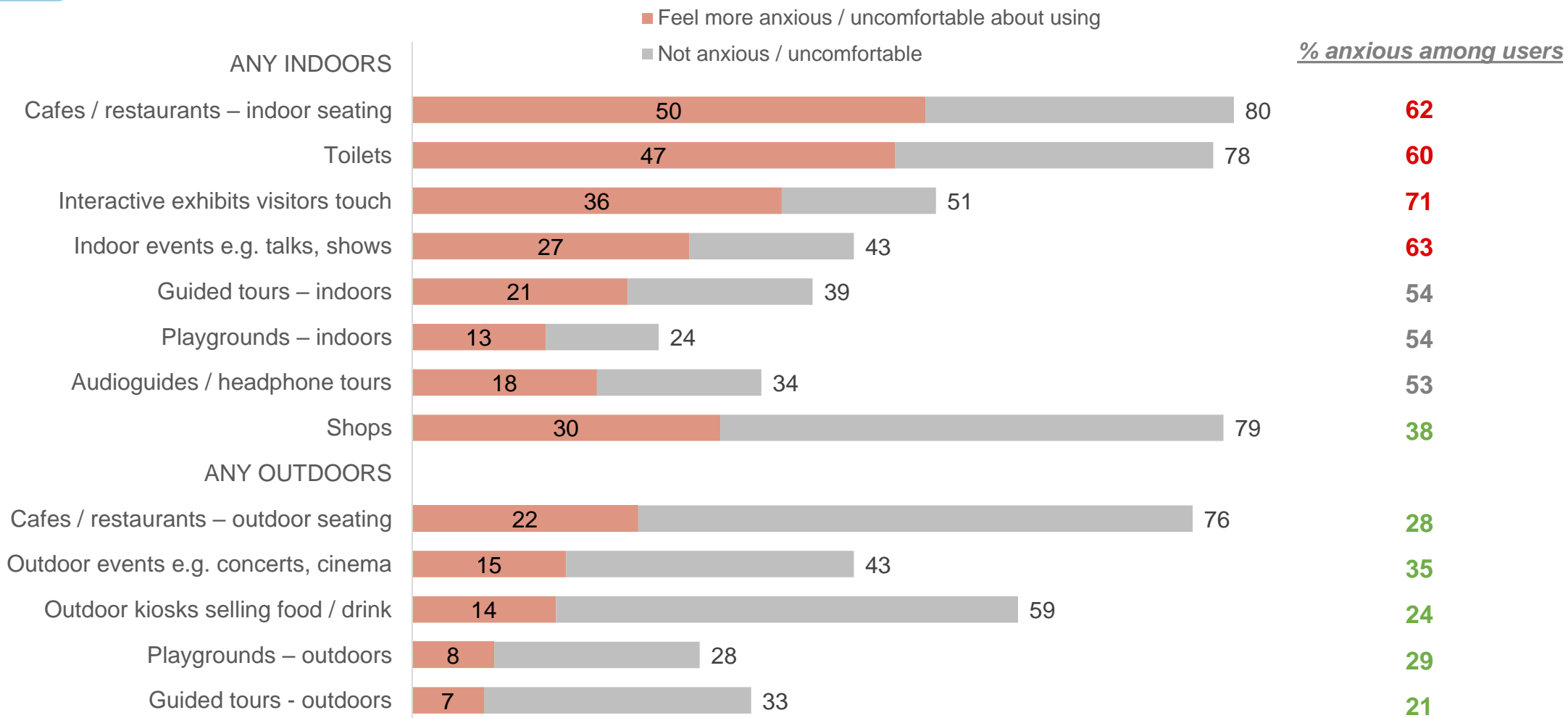
From Feb 20, 2020 To May 16, 2020 Zoom 1m 3m YTD All



The frequently used facilities with most anxiety around use on re-opening are indoor cafés / restaurants and toilets



Wave 2: Level of anxiety among those who would ordinarily use (%)



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

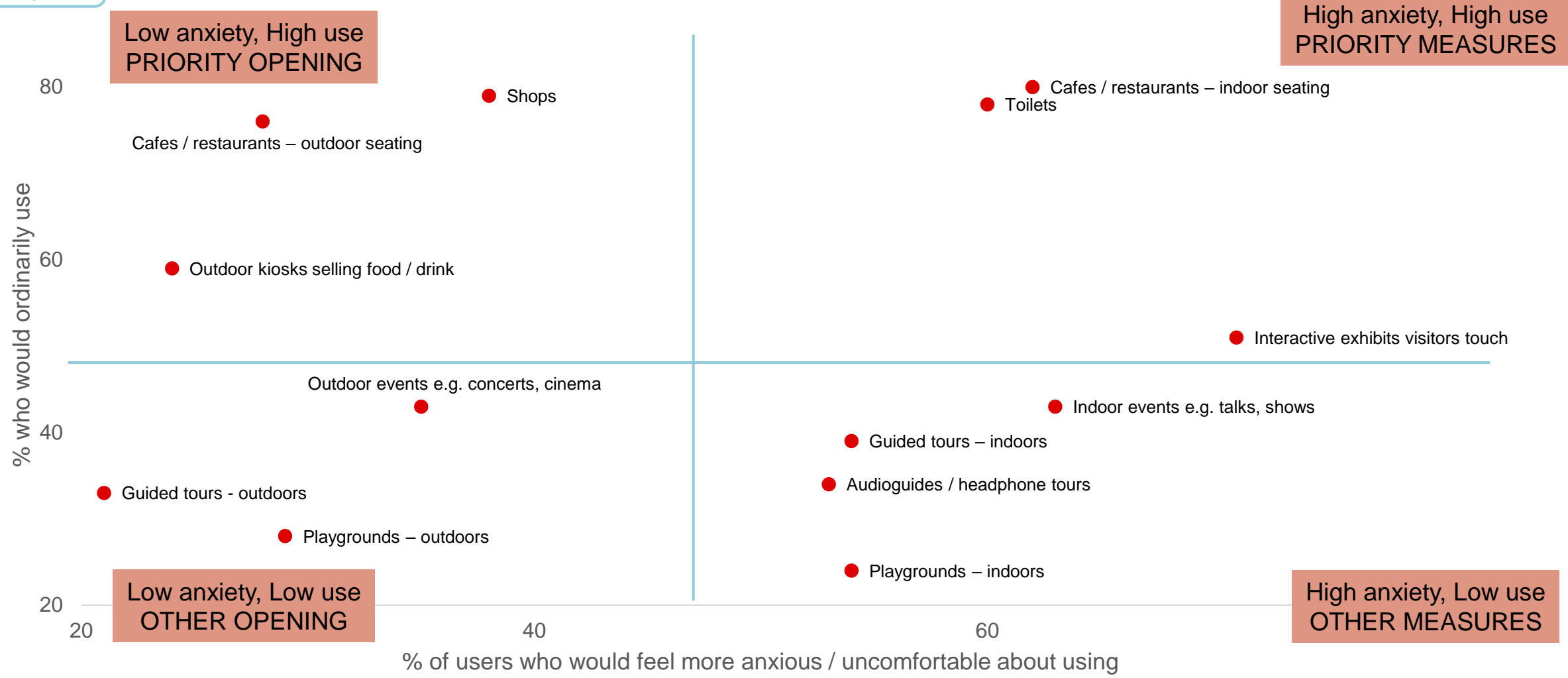
Base: All respondents, Wave 2 (760)

As a sector, we can use this information on anxiety and usage to prioritise actions. Individual attractions can adapt this information based on their own known usage of facilities

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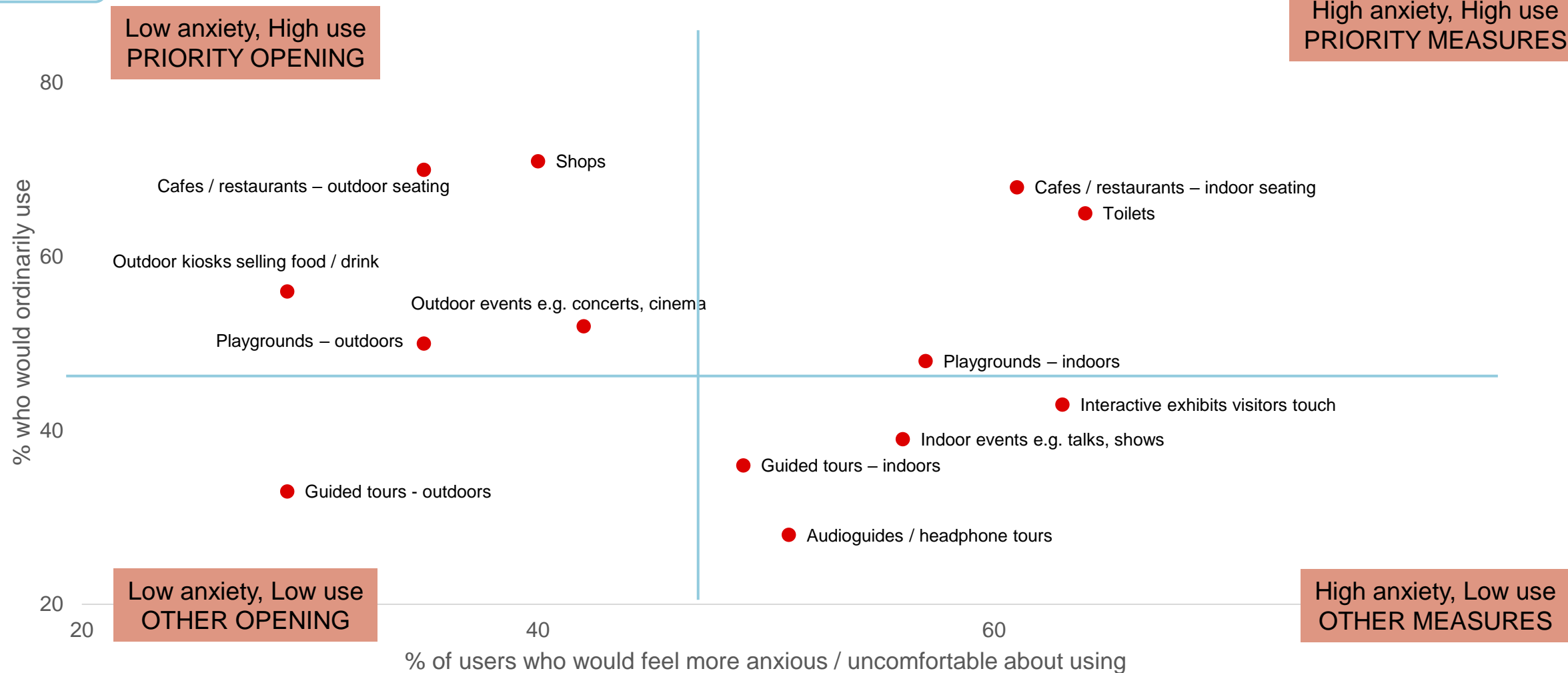
Wave 2: Level of anxiety among those who would ordinarily use



Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open?
 Base: All respondents, Wave 2 (760)

As an example, among 'families' there are a greater number of facilities in the 'Priority Opening' segment, although some increased anxiety around outdoor events

Wave 2: Level of anxiety among those who would ordinarily use
BASE: All with children aged 0-15 years in their household



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

Base: All respondents with children in their household, Wave 2 (214)

Anxiety increases with age for indoor facilities. Flexibility in switching facilities outside, where feasible, will benefit attractions with an older age profile

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Wave 2: % of users who will feel more anxious or uncomfortable about using than usual at attractions (%)

INDOOR FACILITIES

%	Aged under 35	Aged 35-54	Aged 55 or over
Cafes / restaurants – indoor seating	54	60	71
Interactive exhibits visitors touch	64	62	81
Indoor events e.g. talks, shows	62	59	65
Guided tours – indoors	34	55	67
Audioguides / headphone tours	43	54	61



OUTDOOR FACILITIES

%	Aged under 35	Aged 35-54	Aged 55 or over
Cafes / restaurants – outdoor seating	26	28	34
Outdoor events e.g. concert, cinema	43	28	29
Outdoor kiosks selling food / drink	21	25	27
Guided tours – outdoors	22	19	19

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

Base: All respondents, Wave 2 (760)

With a decline in confidence, there is more clamour for measures to be introduced on site to increase safety. There is reduced resistance to PPE compared with Wave 1

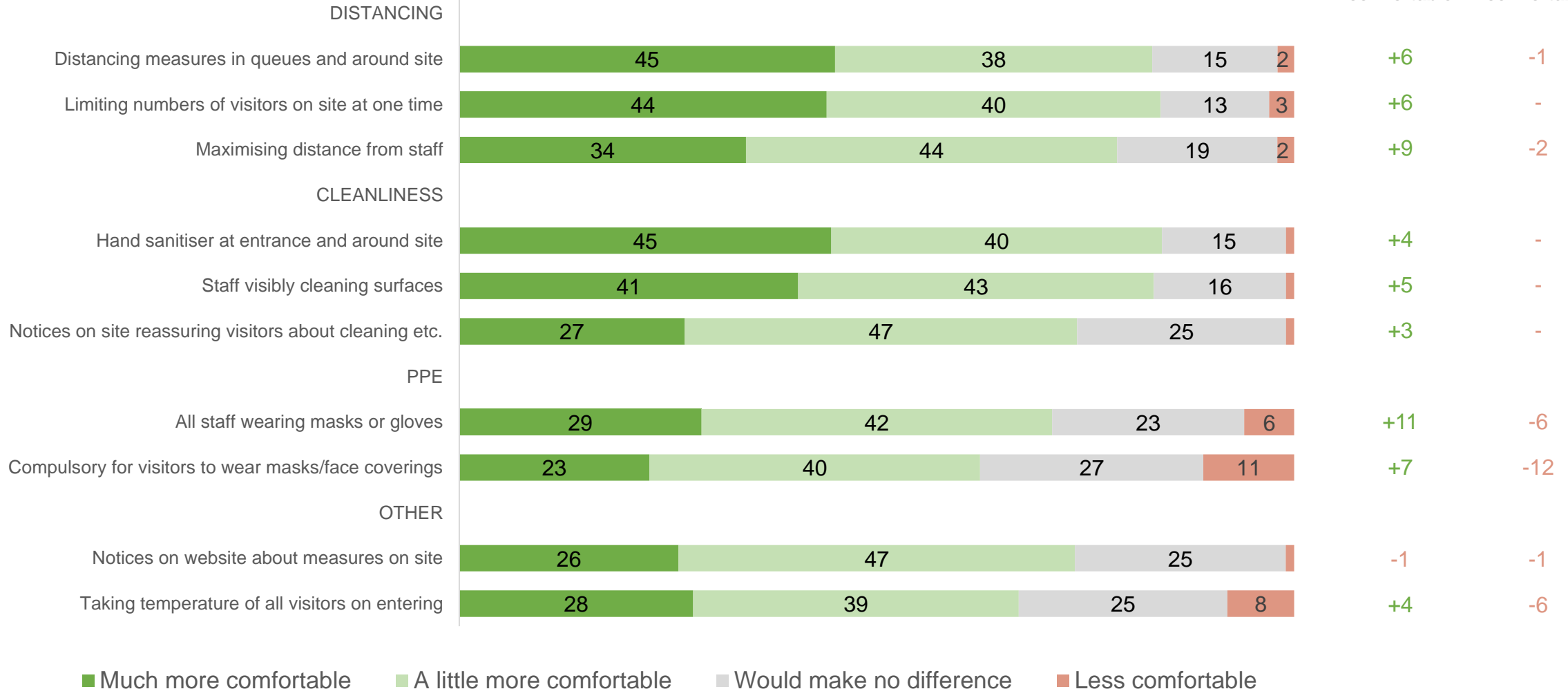
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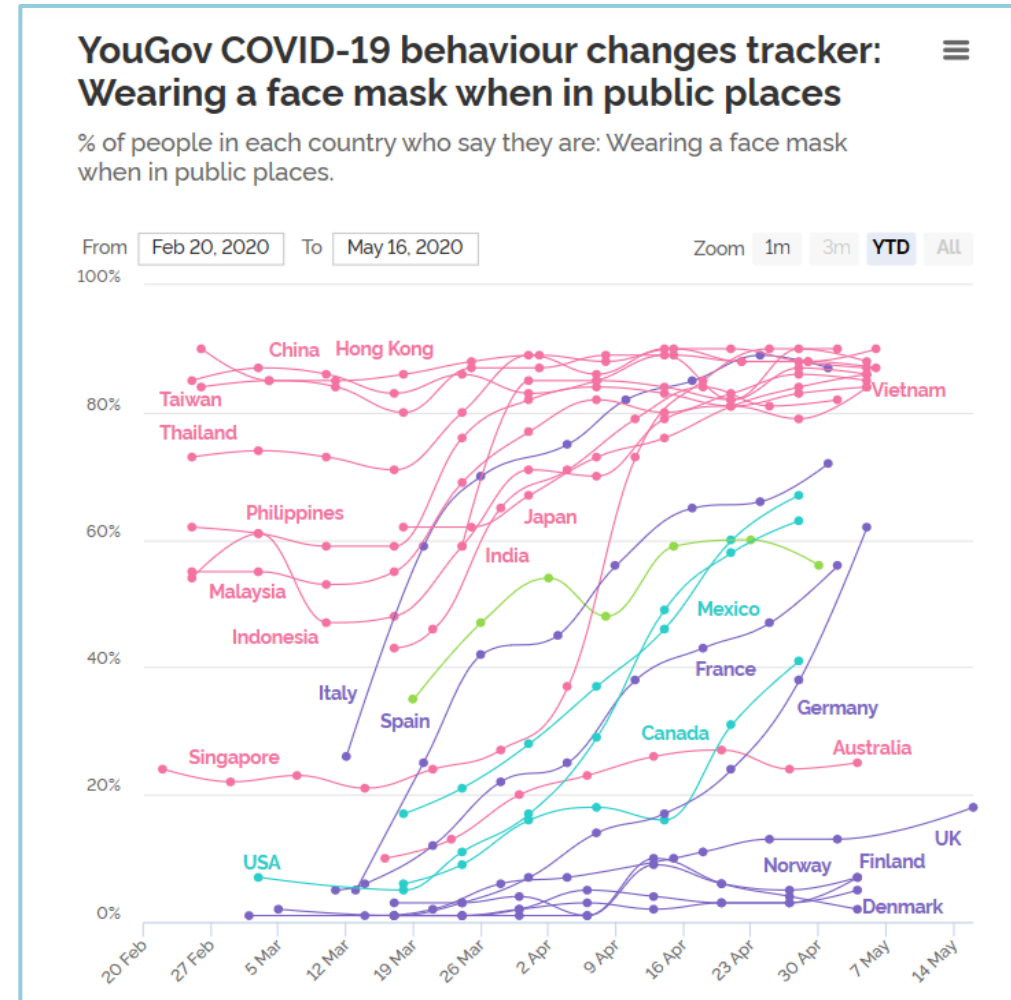
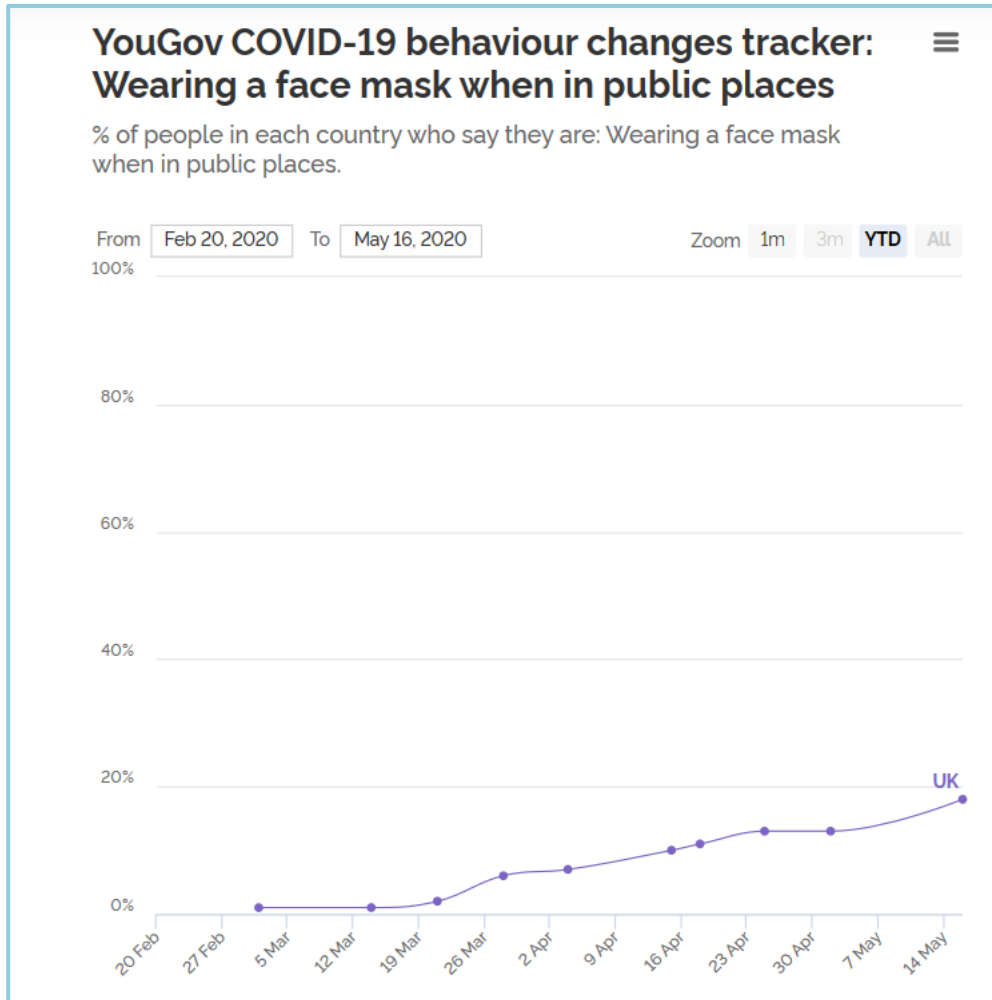
Wave 2: Which of these measures would make you feel more comfortable about visiting (%)

% change vs. Wave 1

Much more comfortable Less comfortable

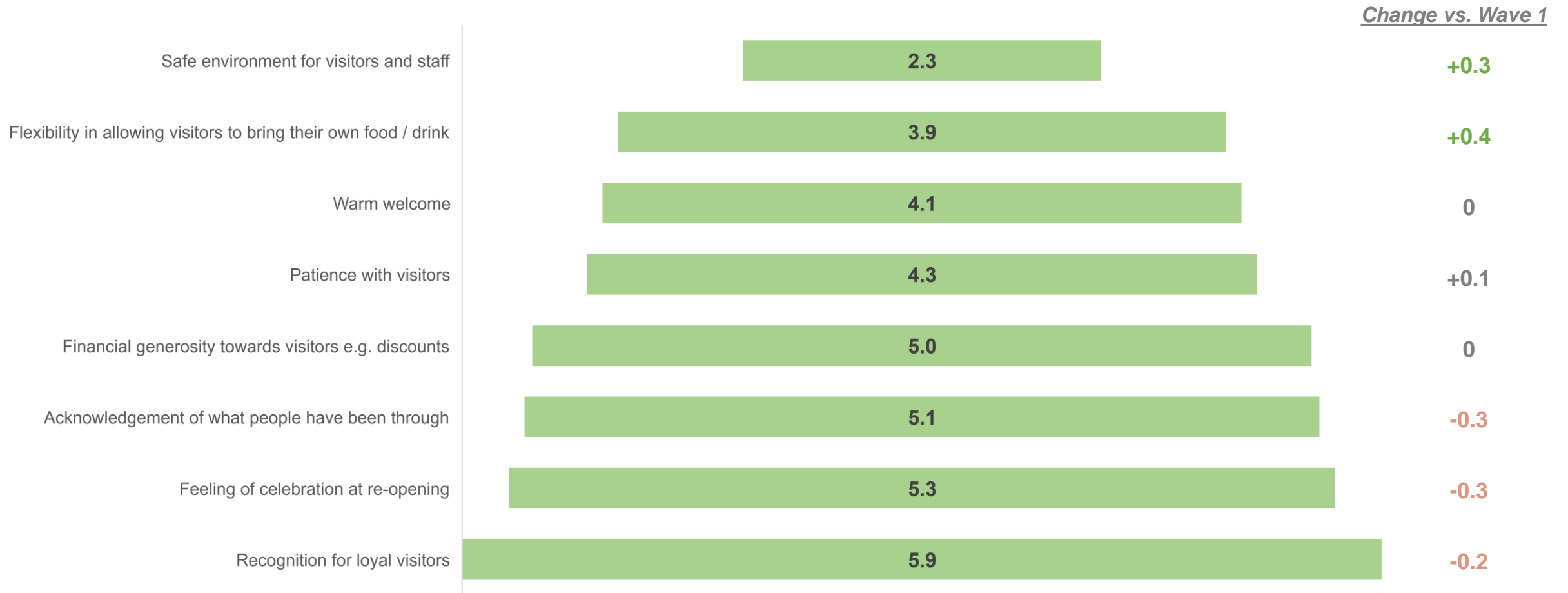


The wearing of face masks is becoming more common in the UK, but is still below 20% and certainly not ingrained within our culture



Even more so than at Wave 1, audiences feel that attractions should focus their efforts primarily upon providing a **safe environment** for visitors. Flexibility on bringing own food / drink has become more important, joining a warm welcome and patience with visitors as key

Average Importance Ranking of characteristics would most like to see in attractions when they re-open (1=highest, 8=lowest)



Q: Which of these characteristics would you most like to see in visitor attractions when they re-open? Please rank these in order, starting with the characteristic that you would most like to see, ranked as number 1.

Base: All respondents – Wave 1 (668), Wave 2 (760)

Key take-outs

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Federasiwn Amgueddfeydd
ac Oriolau Celf Cymru
The Federation of Museums
and Art Galleries of Wales



Key take-outs / 1 *(Wave 2: 13-18 May)*

Since the government announcement around lockdown easing, the market has become even more cautious about visits than before, especially to indoor attractions – perhaps concern over lockdown easing and / or naming aspirational re-opening dates bringing home the visit realities?

General concern over crowds and distancing is still the major visit barrier, but people are becoming more focussed on the **safety measures** they expect from attractions when they re-open, whether general or specific e.g. pre-booking only

Impact of a ‘charter mark’ is therefore likely to be high – over half the market feel this would give them the extra confidence they needed to visit. In the eyes of the public, top safety priorities are:

- 🕒 Limiting visitor numbers on-site, primarily at indoor attractions
- 🕒 Be seen to be implementing and monitoring / policing distancing measures on-site
- 🕒 Toilets and indoor cafés
- 🕒 Interactive exhibits or anything that visitors touch
- 🕒 Hand sanitiser around the site and staff visibly cleaning

Key take-outs / 2 *(Wave 2: 13-18 May)*

Moving elements of the visit experience outside, where possible, will undoubtedly help generate visits – outdoor kiosks, tours, small events, picnic areas. Outdoor, open spaces are increasingly recognised by the public as safer than indoor, enclosed spaces

There is an increased acceptance of PPE among potential visitors, with very little pushback to either staff or visitors wearing face masks (or at least face coverings)

Visitor-facing staff can have a hugely positive impact – providing a warm welcome and showing patience with visitor anxieties – but they will need a new skill set to proactively deal with the public's adherence to distancing protocols in place

Concerns around using public transport to visit attractions is high, particular underground trains and buses

Visitors are not expecting blanket admissions price discounting, with notable proportions of 'members', families and younger people (aged under 35yrs) expecting to pay more on re-opening

But let's not forget the underlying motivations for visiting attractions – new experiences, learning, fun, relaxation etc. Challenge is how can we implement these much desired safety measures yet simultaneously continue to deliver our amazing experiences.

Next steps / 1

Run the research again periodically when we predict that there could be a material change in sentiment:

- When the public has firmer details about the timing of re-opening
- When the public has information on the measures that attractions will have in place
- Shortly after re-opening, as the public reacts to the new visiting environment and initial successes or otherwise

Incorporate any new issues as they emerge

Next steps / 2

ALVA Visitor Recovery Benchmarking

ALVA

In the period following re-opening, many individual attraction organisations are likely to be asking themselves the same questions:

- How are our visitors feeling about new safety measures we have in place? Are we getting these right?
- How are our visitors feeling about our staff? How well are they putting visitors at ease / 'policing'?
- To what extent are we still able to deliver the visit experience which meets the motivations of visitors?
- How is our visitor profile different and how have their motivations changed in this period?

ALVA launching a visitor benchmarking survey at a time when budgets are low and need for insight and access to best practice examples is high.

'Online only booking' policy for many attractions offers unique opportunity to reach large, representative samples of visitors quickly and at low cost via online post-visit survey

Core questionnaire with potential to add bespoke questions, with results via online dashboard

Individual attraction organisations responsible for mailing online survey invites to visitors

Base costs will be £hundreds not £thousands for three months participation

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 1 (20-24 April)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE

SAMPLE DEFINITION:

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

QA. During 2019, 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 once they re-open to the public following the Coronavirus outbreak. 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 once they re-open to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.

OPEN RESPONSE

Q2. Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open? RANDOMISE ORDER
(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

Q3. And how much more anxious do you think you will feel about visiting each of these types of attraction after they re-open? RANDOMISE ORDER
(No more anxious than before, A little more anxious, A lot more anxious, 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

Q4. Thinking about visiting attractions generally 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.
- Notices on the website about 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
- 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 cafe
- Taking the temperature of all visitors on entering

Q4a. Are there any other measures that would make you feel more comfortable about visiting attractions once they re-open?

OPEN RESPONSE

Q5. At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open? RANDOMISE ORDER

- 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
- Other (please tell us what _____)
- None

Q6. Which of these characteristics would you most like to see in visitor attractions when they re-open? Please rank these in order, starting with the characteristic that you would most like to see, ranked as number 1. RANDOMISE ORDER

- Safe environment for visitors and staff
- Warm welcome
- Patience with visitors
- Financial generosity towards visitors e.g. discounts
- Recognition for loyal visitors
- Feeling of celebration at re-opening
- Acknowledgement of what people have been through
- Flexibility in allowing visitors to bring their own food / drink

Q6a. Are there any other characteristics that you would value highly from visitor attractions when they re-open?

OPEN RESPONSE

Q6b. When attractions re-open, what is your opinion of how much you would expect to pay or donate to attractions you visit compared to before the Coronavirus outbreak? Please drag the pointer to the place on the 7 point scale which best represents your view. REVERSE SCALE IF POSSIBLE

I expect to pay for or donate...

- LESS to the attractions I visit, as most visitors will be worse off financially
- ABOUT THE SAME as before
- MORE to the attractions I visit, as they need financial help right now

Q7. 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

Q8. 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 2 (13-19 May)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE

SAMPLE DEFINITION:

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

QA. During 2019, 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 once they re-open to the public following the Coronavirus outbreak. 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 once they re-open to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.

OPEN RESPONSE

Q2. Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open? RANDOMISE ORDER
(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

Q4. Thinking about visiting attractions generally 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 most 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.
Notices on the website about 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

- 1 -

Q5a. At visitor attractions which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open? RANDOMISE ORDER

Q5b. 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

Q6. Which of these characteristics would you most like to see in visitor attractions when they re-open? Please rank these in order, starting with the characteristic that you would most like to see, ranked as number 1. RANDOMISE ORDER

- Safe environment for visitors and staff
Warm welcome
Patience with visitors
Financial generosity towards visitors e.g. discounts
Recognition for loyal visitors
Feeling of celebration at re-opening
Acknowledgement of what people have been through
Flexibility in allowing visitors to bring their own food / drink

Q6a. When attractions re-open, what is your opinion of how much you would expect to pay to enter the attractions you visit compared to before the Coronavirus outbreak? Please drag the pointer to the place on the 7 point scale which best represents your view. REVERSE SCALE IF POSSIBLE

I expect to pay...

- LESS to enter the attractions I visit
ABOUT THE SAME as before
MORE to enter the attractions I visit
I never visit attractions that I have to pay to enter

Q6b. 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? RANDOMISE ORDER
(I would be comfortable using, I would be anxious but would probably use, I 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

Q6c. If a visitor attraction you wanted to visit was awarded an 'accreditation certificate' which confirmed they had put in place recognised measures to minimise the risk of spreading Coronavirus, how would this make you feel about visiting after it re-opened? DO NOT RANDOMISE

- It would give me the extra confidence I needed to visit,
I would be confident about visiting anyway
It would not be enough to give me confidence in visiting

- 2 -

Q7. 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

Q8. 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 -