



ALVA Attractions Recovery Tracker

Wave 3

Fieldwork: 9-12 June 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

Initial lockdown easing England (13 May)

919 survey responses

Wave 3: 9-12 June

England gardens open (1 June), zoos / shops (15 June)

1,065 survey responses

Survey responses boosted in.....

**Wales
(to 151)**

**Scotland
(to 104)**

Survey responses boosted in.....

**Wales
(to 100)**

**Scotland
(to 302)**



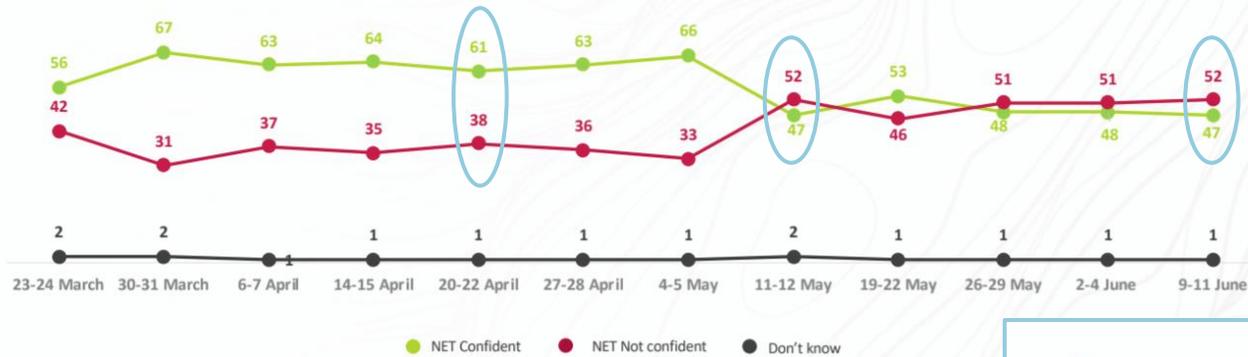
How is the public feeling about visiting attractions?

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After mid-May's dip following the initial lockdown easing, national optimism has steadily improved despite no increase in confidence of the government's handling of the crisis

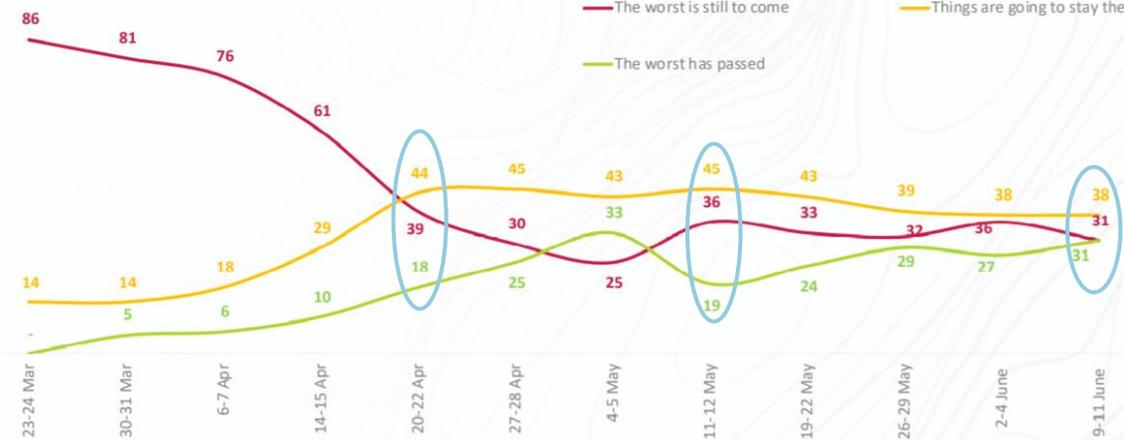
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



○ Timing of ALVA Attractions Recovery Tracker waves

Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)

— The worst is still to come
— Things are going to stay the same
— The worst has passed



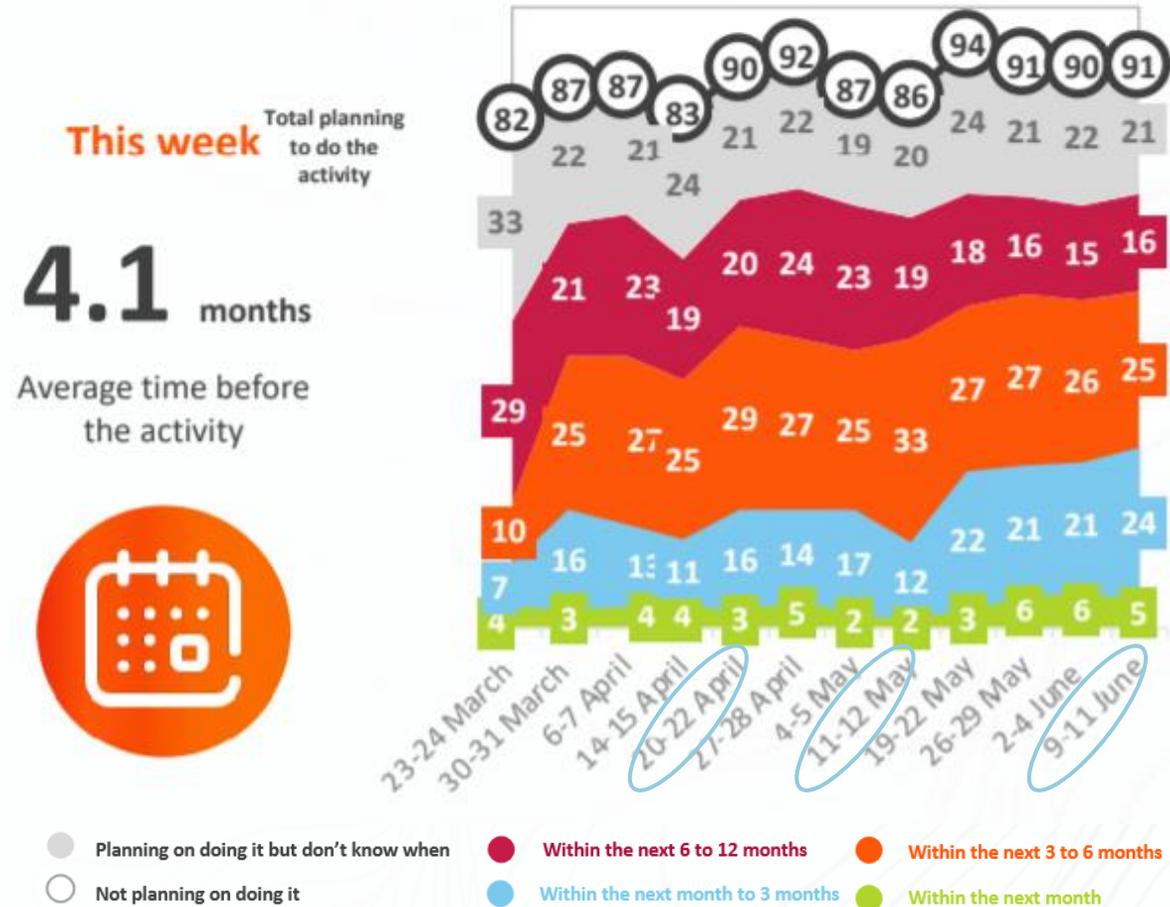
Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)

ALLIGATOR BVA BDRG

Perhaps reflecting the public's observation of the trends in infection and death rates?

Strong increase in the proportion of the population intending to visit an attraction in the next 3 months, at a time when intention to visit gyms, cinemas or book accommodation remains low

Go on a day out to a visitor attraction



Likely to be a combination of:

- News on opening up of outdoor attractions (23 May) and subsequent opening in early June & news on zoos
 - Seasonality
-rather than any general improvement in national confidence around the crisis

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

Following the significant dip in attraction visiting confidence after initial lockdown easing, there has been a strong upturn in early June. 10% of the market (**c.4m adults**) claim to have already visited an attraction

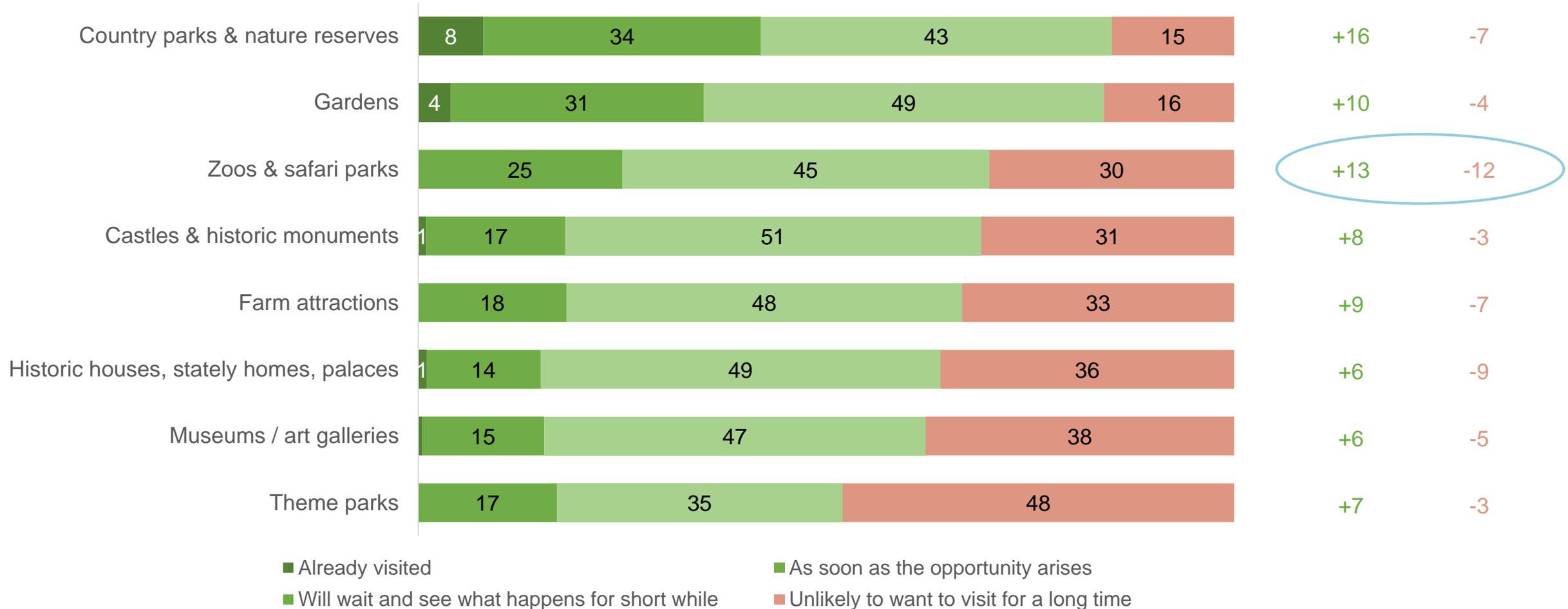
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Wave 3: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)

% change vs. WAVE 2

Already / as soon opp. Unlikely for long time



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 who tend to visit this type of attraction – Wave 3: Museums/art galleries (669), Historic houses etc. (637), Castles & monuments (672), Zoos/safari parks (603), Gardens (676), Theme parks (471), Country parks & nature reserves (707), Farms (485)

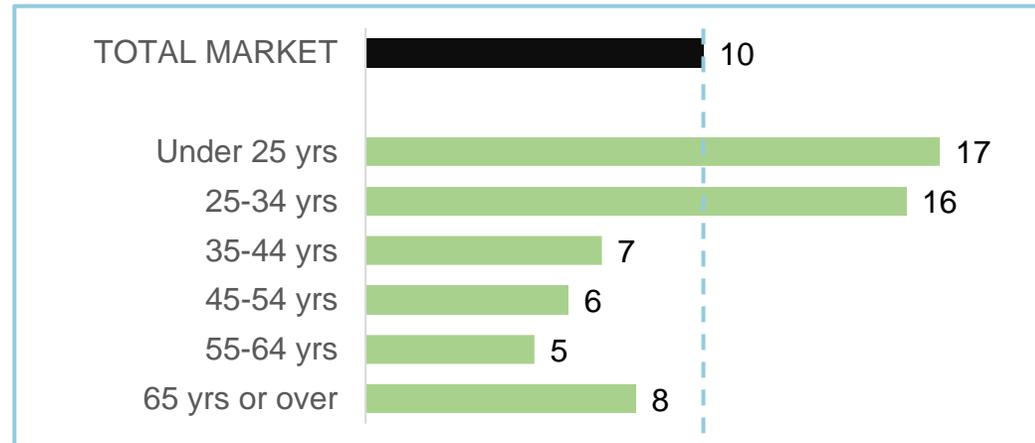
Initial evidence indicates that very early returning (mainly country park visitors) is more likely among younger adults and it's not just frequent visitors who are returning quickly

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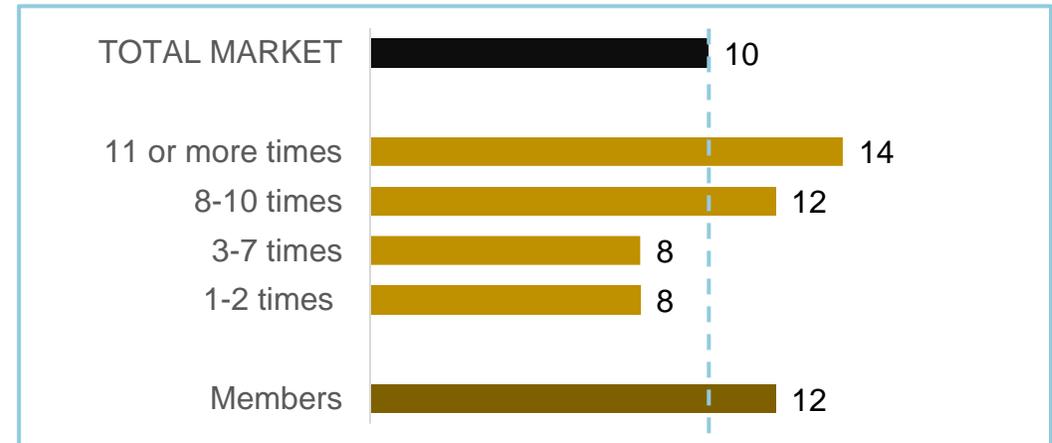
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% who claim to **ALREADY HAVE** visited at least one attraction type after re-opening

Age (%)



Attraction visiting frequency in 2019 (%)



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?

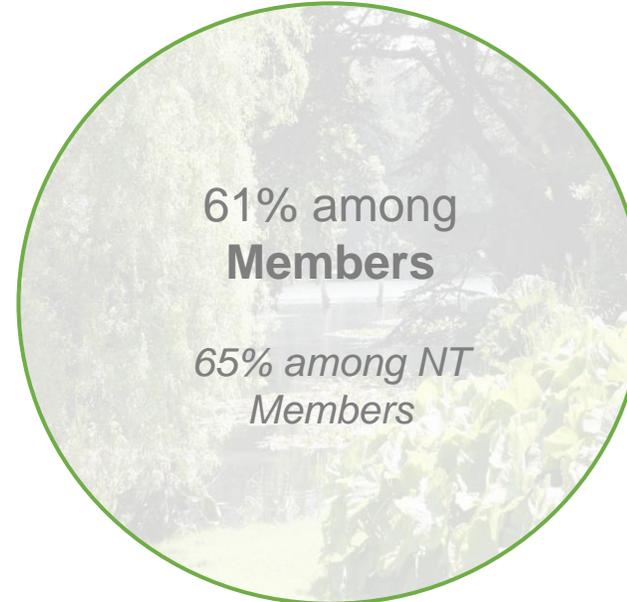
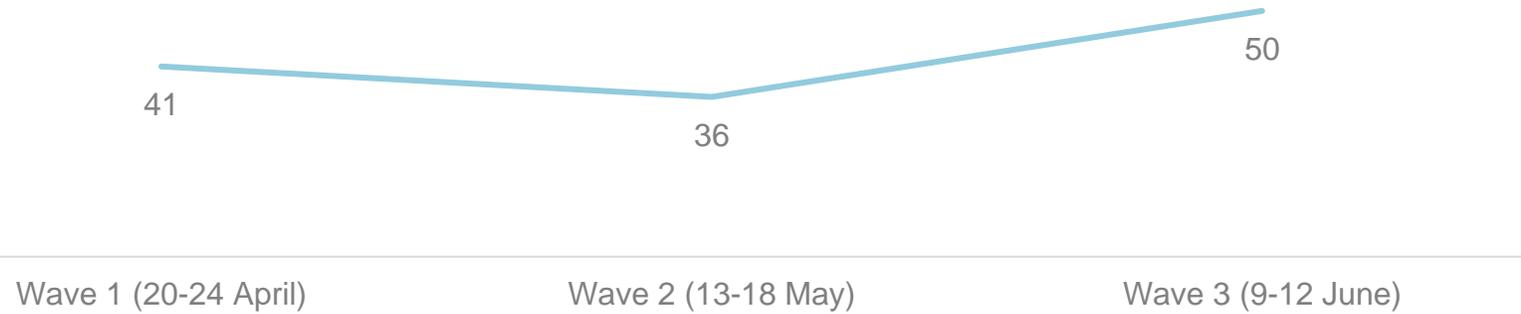
Bases: All respondents who have already made a visit since re-opening, Wave 3 (77)

Half of the attraction-visiting market now claim they will visit somewhere as soon as opportunity arises (or have visited already). Still the most frequent attraction visitors claiming to return first

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



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 3 (750)

Although there is now evidence that younger people are more likely to be the earliest returners, older people are still reasonably confident about a quick return

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Wave 3: 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 55-64	Aged 65 or over
Country parks & nature reserves	42	47	41	37	36
Gardens	35	38	33	35	35
Zoos & safari parks	25	27	24	29	14
Castles & historic monuments	18	19	19	17	16
Farm attractions	18	22	15	23	8
Historic houses, stately homes, palaces	15	14	17	16	13
Museums / art galleries	15	18	17	10	9
Theme parks	17	21	14	15	6

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 who tend to visit this type of attraction, Wave 3

Visit confidence among those with children took a huge knock in May, following announcements on schools re-opening. There has been a massive return in confidence in the intervening period

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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')

CHILDREN UNDER 16 AT HOME

AS SOON AS OPPORTUNITY ARISES (%)	Wave 2 (13-18 May)	Wave 3 (9-12 June)	% change vs. Wave 2
Country parks & nature reserves	22	44	+22
Gardens	19	38	+19
Zoos & safari parks	12	35	+23
Castles & historic monuments	9	20	+11
Farm attractions	7	22	+15
Historic houses, stately homes, palaces	8	17	+9
Museums / art galleries	7	18	+11
Theme parks	9	20	+11

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 who tend to visit this type of attraction, Wave 3

Since end April, there has been a growing gap in confidence between returning to outdoor and indoor attractions

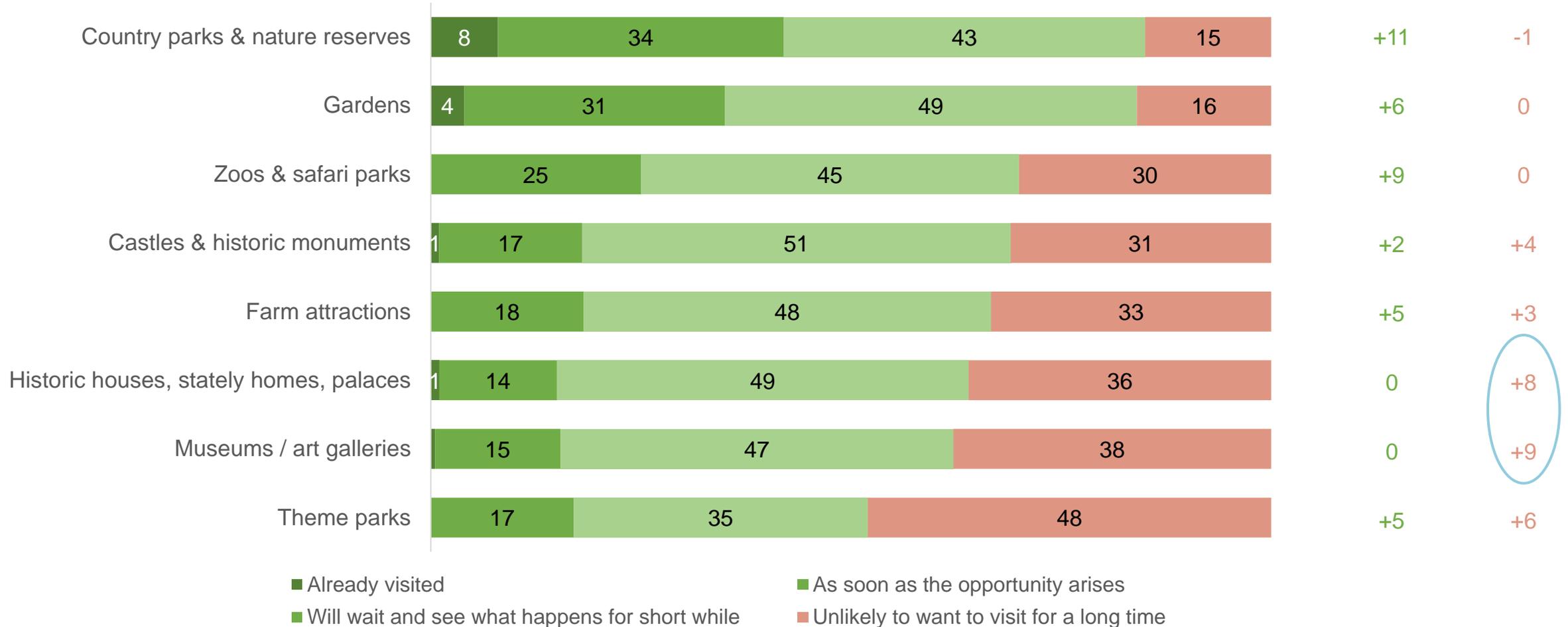
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Wave 3: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)

% change vs. WAVE 1

Already / as soon opp. Unlikely for long time

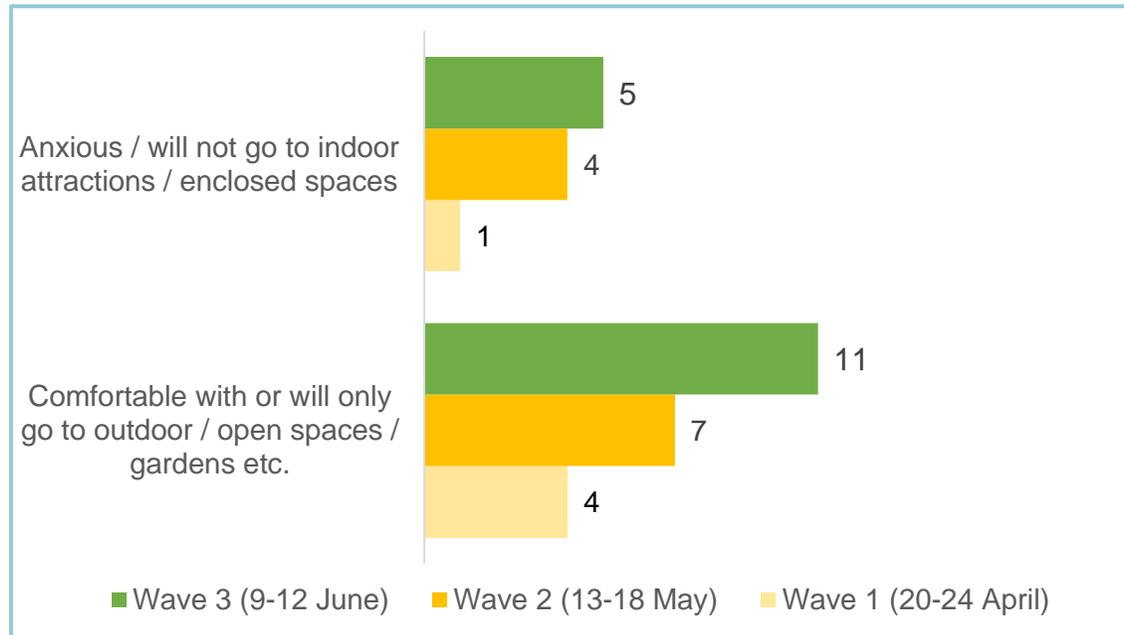


Concern is higher around visiting indoor attractions, so the importance of implementing and communicating safety measures will be even more important for these attractions on re-opening

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



Open-air spaces like parks, gardens or castle ruins I'm not too concerned about and would like to go and visit within a month of re-opening. Museums, state houses and cinema I'll be more cautious, and **make sure there are clear guidelines on their official website to limit number of visitors, staff are wearing masks/gloves etc** before I consider visiting

I think that outdoor venues - gardens, zoos are fine providing social distancing is observed, I think fairground attractions will not be feasible as would indoor venues like stately homes, museums, theatres, etc as **control of indoor venues including toilet facilities will be so much more difficult**

Comfortable with visiting outdoor attractions but would likely be wary of indoor attractions **even with mitigation.**

I'm more comfortable visiting outdoor attractions where there's wide open space and it's easier to social distance than attractions which require going inside buildings where you **can't control how far you are from other people**

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?

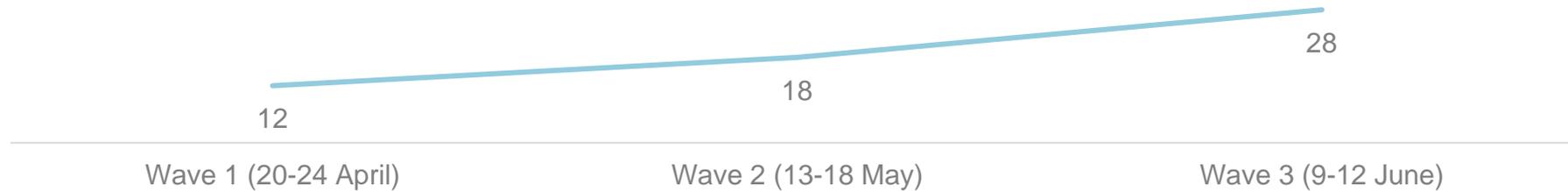
Base: All respondents, Wave 1 (668), Wave 2 (760), Wave 3 (750)

Main barrier to visiting is increasingly around worries about fellow visitors adhering to distancing measures or attractions' ability to enforce these measures

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% of the market who spontaneously mention 'social distancing' when asked about visiting attractions



11% mention specific concerns about fellow visitors or ability to enforce distancing (Wave 3)

Obviously of concern is both how the attraction will implement both social distancing measures and cleansing routines also how other people will follow the rules for distancing as currently there is a **small part of the population who seem to feel that they are special and consequently don't need to follow the guidelines.** It's **imperative that the attractions themselves actively police the rules so people feel safe.**

Apprehensive, not for the site (I am sure they will take all precautions) but for the people - **They're pack idiots....** There will always be a few groups that feel impervious to the issue & disregards anyone's right to their space...

It very much depends on **how much control there is** & if some behave like selfish morons!! Look at some beaches, Durdle Door, Wareham Forest, The New Forest & many others throughout the country. Until those selfish 'people' learn to behave in a civilised fashion, **NORMAL** people will suffer & be unable to enjoy all these wonderful places :'(

I feel really anxious about returning. For the most part, **I trust the venues** as I think that they will have adequate health and safety measures in place, **it's the other visitors that I don't trust.**

I have concerns that other visitors will not social distance and this **will not be enforced at the attractions by staff.**

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 3 (750)

As awareness grows, more people are referring to **advanced booking** as a way of limiting capacity: this indicates 'control' and provides reassurance around crowds, distancing and queuing

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Limiting capacity / advanced booking (5%)

I hope they open soon. I would be happy to visit if the number of **people being allowed in was controlled**, e.g. by ticketing.

In some ways, the situation might make visiting things better for me, as reduced numbers will make the experience less stressful and more fun, however actually getting in at all will be difficult, I **expect pre-booking to become common**.

I'm hoping to go back to supporting them but I'd expect safe measures to be in place and **strict limits on visitor numbers** so distancing can be easily practiced.

I hope they can **restrict the number of people visiting** and continue to social distance people. Also keep updated with hygiene

I'm fine with visiting outdoor attractions as long as **numbers are limited** and people aren't crammed together. I think I'd avoid indoor attractions for the time being and after that would expect limited numbers and distancing policies

Concern around queuing

Hope that it will be possible and that they won't be too crowded or have long queues to get in. Hopefully many will do as the National Trust intend to do and have pre-booking.

I am not worried about the virus as such, it is the queuing that bothers me the most.

I worry that places will be very busy meaning long queues and people not adhering to social distancing

Won't be much fun, queue times will be twice as long and it'll be a waste of money

Overcrowding

I feel optimistic, however, I feel like the attractions will be packed!

It will be nice for them to reopen...my worries are that they will try to cram too many people in, to recoup some of the money that they will have lost over the past few months

I am going to wait a while before visiting these kind of places as I feel that people will flock to them and social distancing will not be possible

I actually work in one and know it will be ok, but am still concerned about safety if there are too many visitors so won't visit for a while.

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 3 (750)

Anxiety around using all forms of public transport is still high, although the numbers saying that they would use in order to travel to attractions is improving

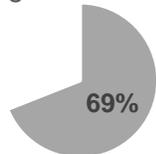


Wave 3: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)

% ever use for attns

% change vs. Wave 2 (WOULD USE)

Underground / metro train



Underground / metro train



+4

Public bus

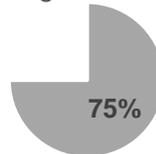


Public bus

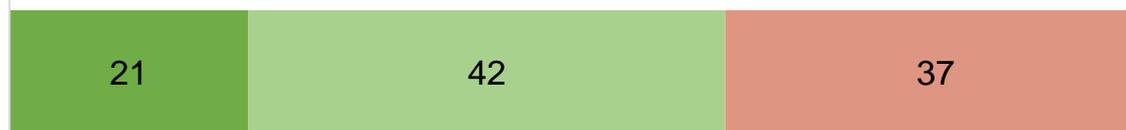


+10

Overground train



Overground train

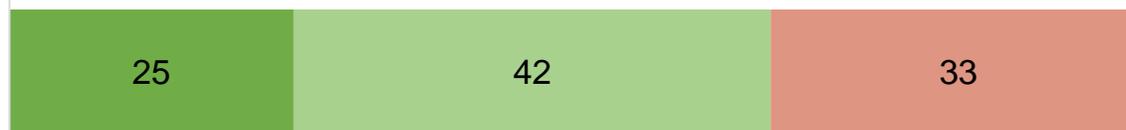


+6

Taxi/minicab



Taxi / minicab



+7

■ 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 who ever use each form of transport to travel to visitor attractions, Wave 3 – taxi/minicab (498), public bus (554), overground train (577), underground/metro train (530)

Among Londoners (and perhaps residents of other major urban centres), confidence has grown significantly, although still concern around using the Underground



Wave 3: 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=104)

% change vs. Wave 2 (WOULD USE)

% ever use for attns

Underground / metro train



Underground / metro train

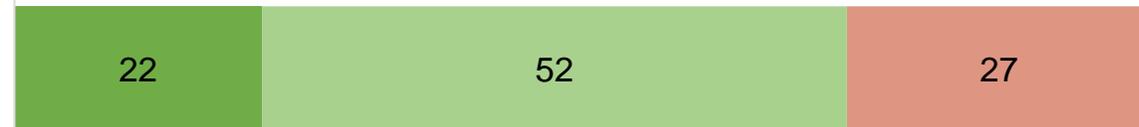


+1

Public bus



Public bus

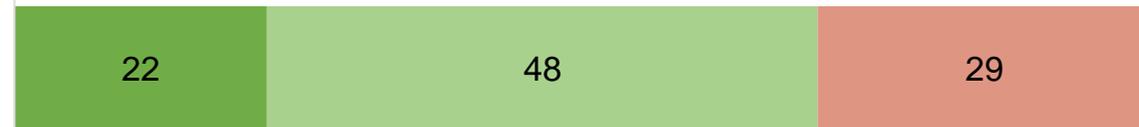


+22

Overground train



Overground train

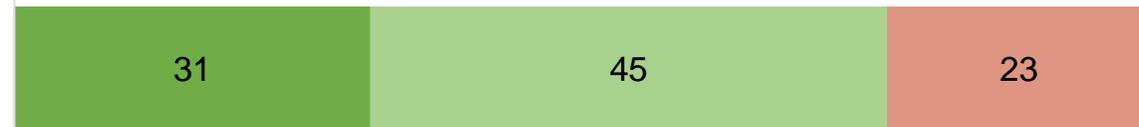


+9

Taxi/minicab



Taxi / minicab



+16

■ 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 3 – taxi/minicab (86), public bus (95), overground train (95), underground/metro train (99)

How can we build trust and confidence in visiting?

What should we do?

What should we say?

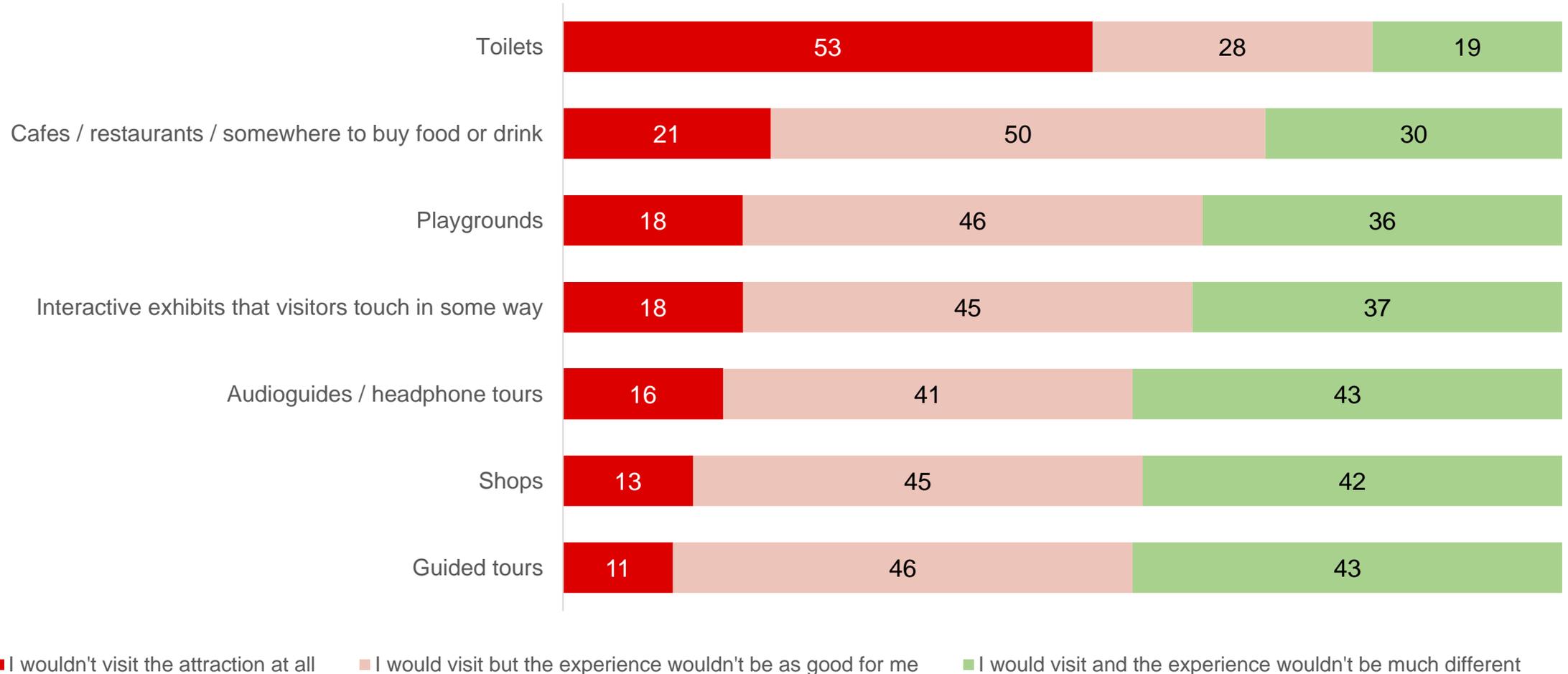
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There is clear demand for services, especially toilets, to be available on re-opening. Half of the market would not visit an attraction which did not have their toilets open



Wave 3: If these facilities were closed or not available when the attraction re-opened, what would you do? (%)



Q: We would now like you to think about the attractions you typically visit that have these facilities. If these facilities were closed or not available when the attraction re-opened, what would you do?
 Base: All who ever used each type of facility at visitor attractions before Coronavirus, Wave 3– cafes/restaurants/ etc. (669), shops (618), toilets (633), playgrounds (242), audioguides/tours (262), guided tours (365), interactive exhibits (431)

If viable, clearly it would be beneficial for attractions to make these facilities available with appropriate safety measures or potential visitors will begin to question the value of the experience

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Is it worth visiting?

I have no worries. I just want places to open and have access to toilets and a cafe. **I cannot stand this part-opening with no added facilities.** I like to go out for the day and experience all what an attraction has to offer

I am actually not worried about it . I would hope that the loos would be open otherwise it would be too difficult to visit. I would also like some sort of food and drink to be available.

I am worried about toilet facilities not being open as this would impact me quite seriously.

Looking forward to visiting again but it will not be the same without toilets, restaurant, cafes, shops etc.

I would like the cafes and restaurants to be open presumably with the tables spaced

I would be concerned if there were too many people. I would not go if there were no toilet facilities.

I think if the cafes and restaurants are not open at the attractions then that would make the day not so good.

Will there be proper access to food & drink?
Will there be proper access to toilets and handwashing? If not: what is the point?

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 3 (750)

It is even more important for attractions with an older age profile to try to open these facilities – especially toilets and a catering offer – as soon as possible

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Wave 3: % who WOULD NOT VISIT if these facilities were closed or not available when the attraction re-opened

WOULD NOT VISIT (%)	TOTAL	Aged under 35	Aged 35-54	Aged 55 or over
Toilets	53	48	46	64
Cafés / restaurants / somewhere to buy food or drink	21	21	16	26
Audioguides / headphone tours	16	13	12	21
Shops	13	12	10	17

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?

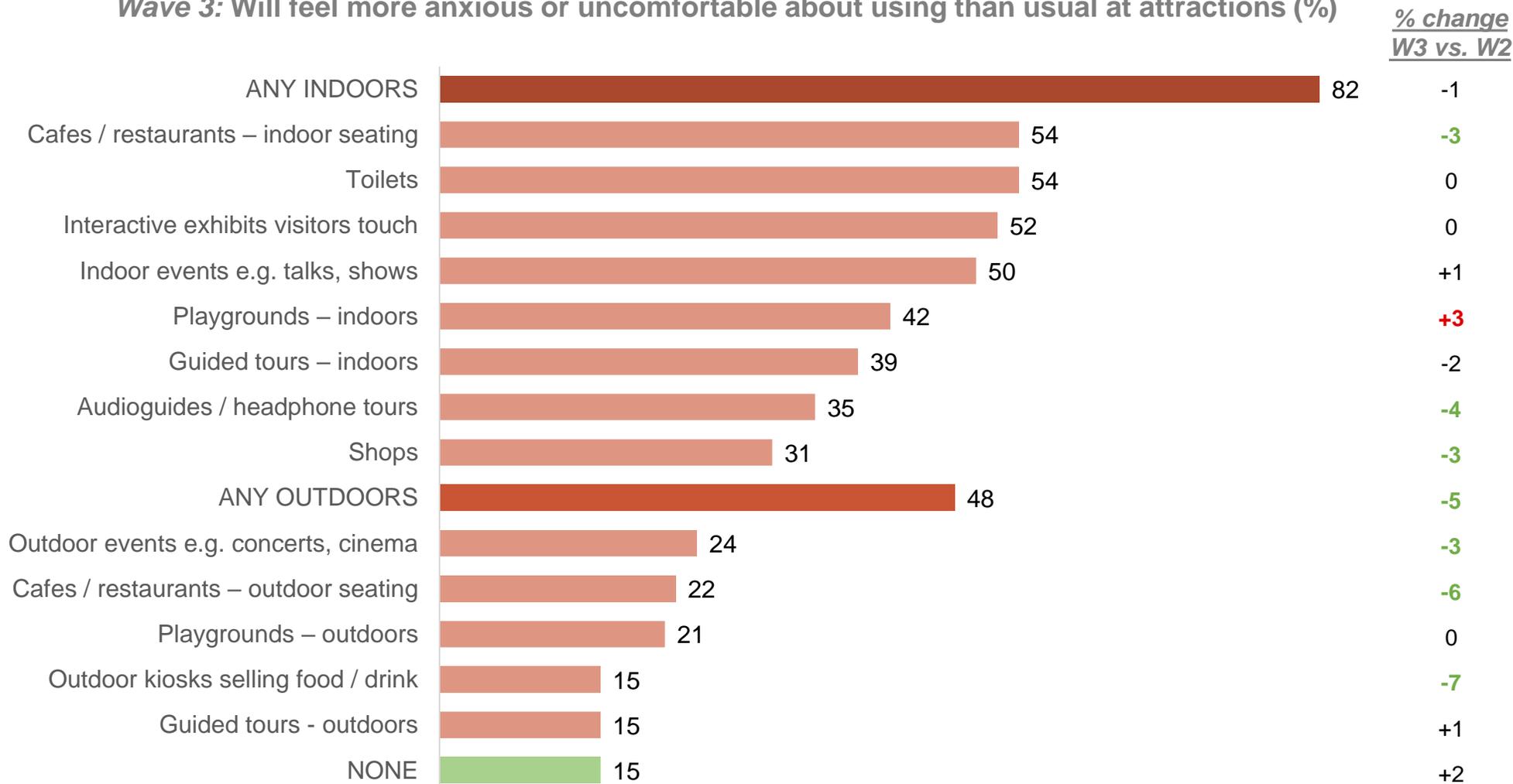
Bases: All who ever used each type of facility at visitor attractions before Coronavirus, Wave 3

However, there remains high anxiety around using these services at attractions, especially toilets, indoor catering and interactives

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Wave 3: 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 2: 760, Wave 3: 750)

And anxiety around using is also higher among older people for indoor facilities – so measures and reassurance is particularly vital for attractions with an older age profile

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Wave 3: % of market 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	40	56	68
Toilets	49	54	60
Interactive exhibits visitors touch	40	49	69
Indoor events e.g. talks, shows	38	53	59
Guided tours – indoors	29	40	51
Audioguides / headphone tours	28	32	48
Shops	26	29	38

OUTDOOR FACILITIES

%	Aged under 35	Aged 35-54	Aged 55 or over
Outdoor events e.g. concert, cinema	29	17	25
Cafes / restaurants – outdoor seating	25	19	22
Outdoor kiosks selling food / drink	13	12	22
Guided tours – outdoors	18	12	14



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

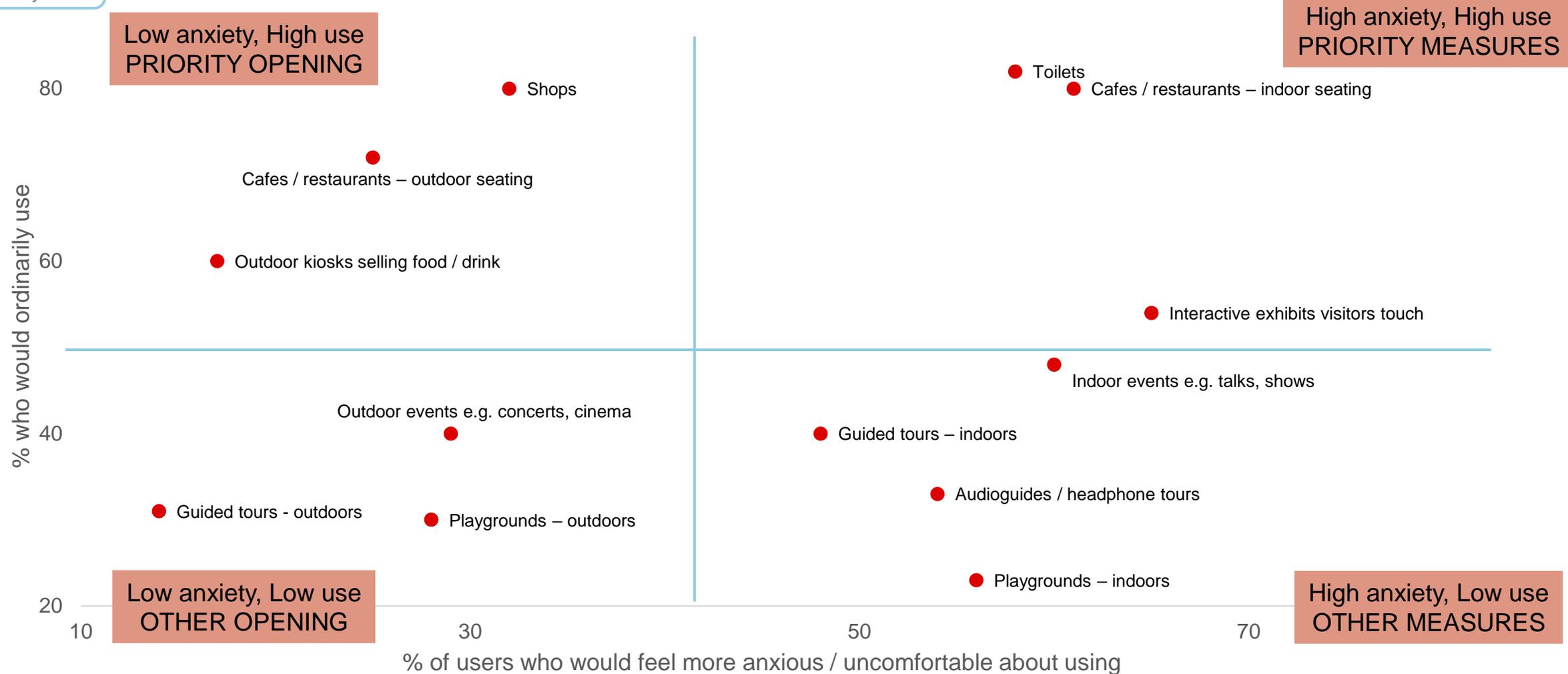
Base: All respondents, Wave 3 (750)

Toilets, indoor catering and interactives are in the *'high use, high anxiety'* area – so need to be priorities for attractions in their pre-visit communications, as well as on-site actions

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Wave 3: 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 3 (750)

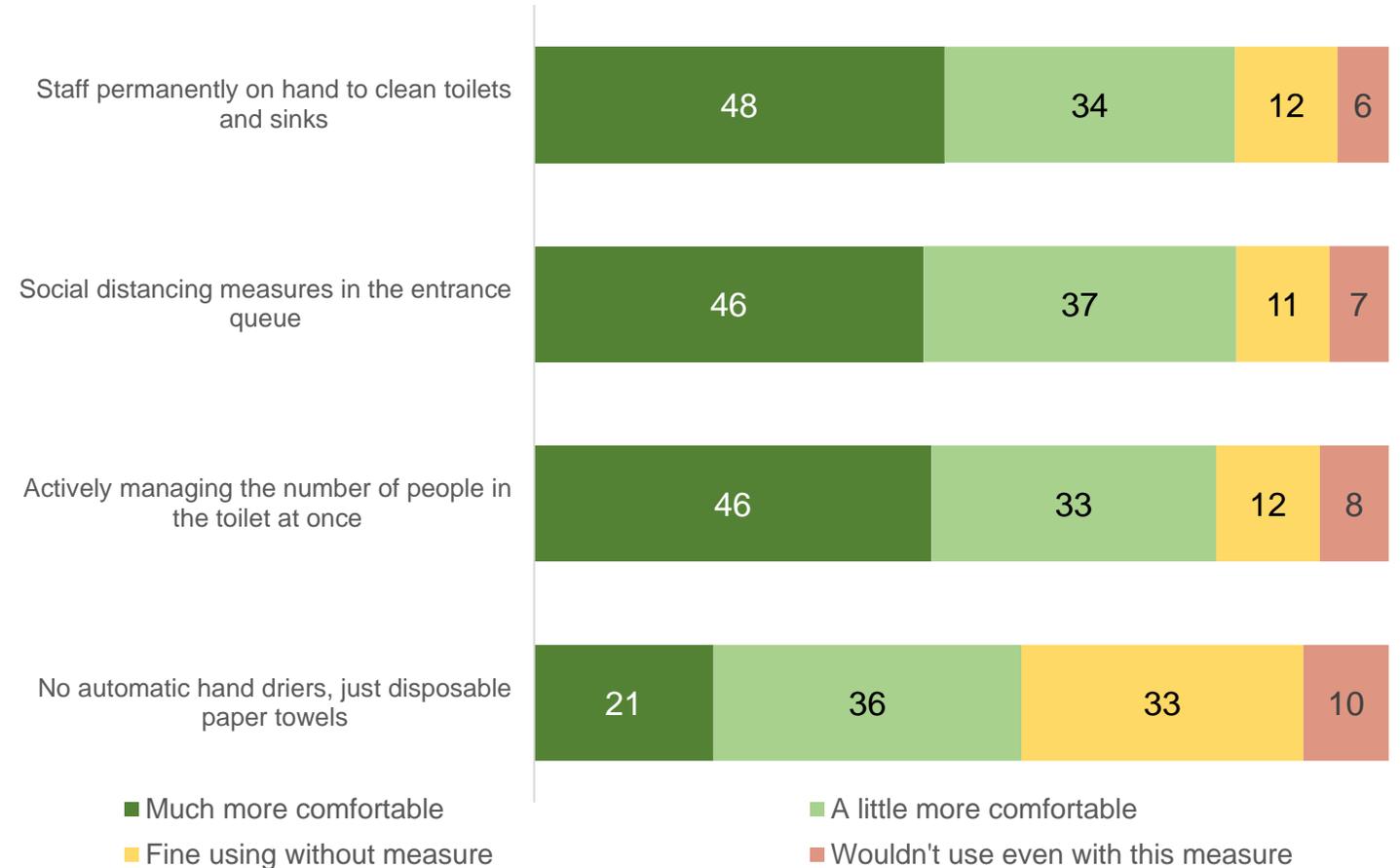
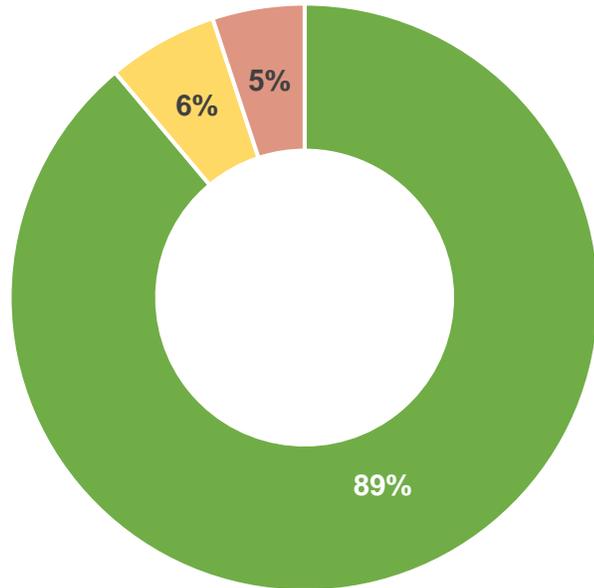
The measures being put in place by attractions around toilets are hugely important in building confidence in their use. Unlikely to be significant criticism of toilets being open if these measures are in place

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Wave 3: How much more comfortable would each of these measures make you feel about using the toilets? (%)

- Any 'more comfortable'
- Fine to use without any measures
- Wouldn't use even with these measures



Q: Thinking about visiting the toilets at an attraction after it re-opens, how much more comfortable would each of these measures make you feel about using them?

Base: All who ever used toilets at visitor attractions before Coronavirus, Wave 3 (633)

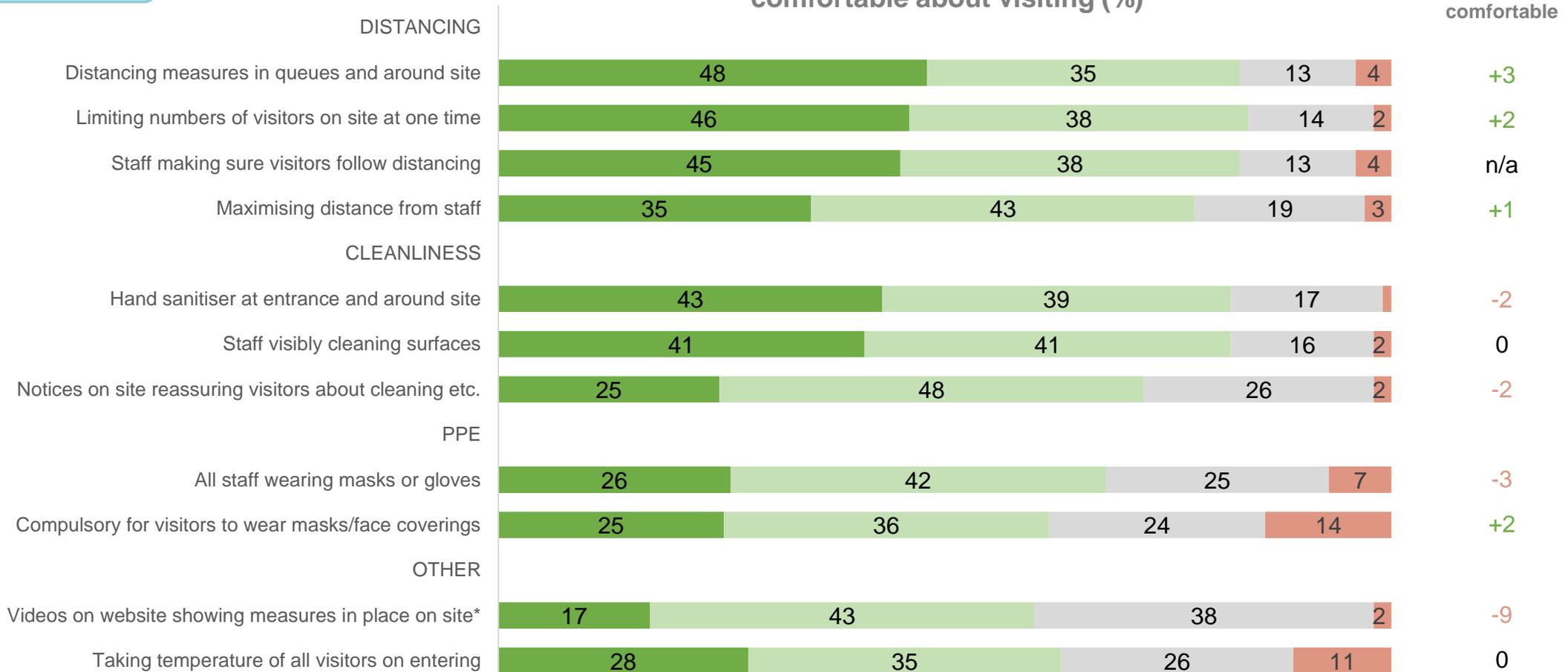
It is increasingly the distancing measures that visitors will be looking out for on re-opening. Being seen to 'police' these measures is as important as the measures themselves

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Wave 3: Which of these measures would make you feel more comfortable about visiting (%)

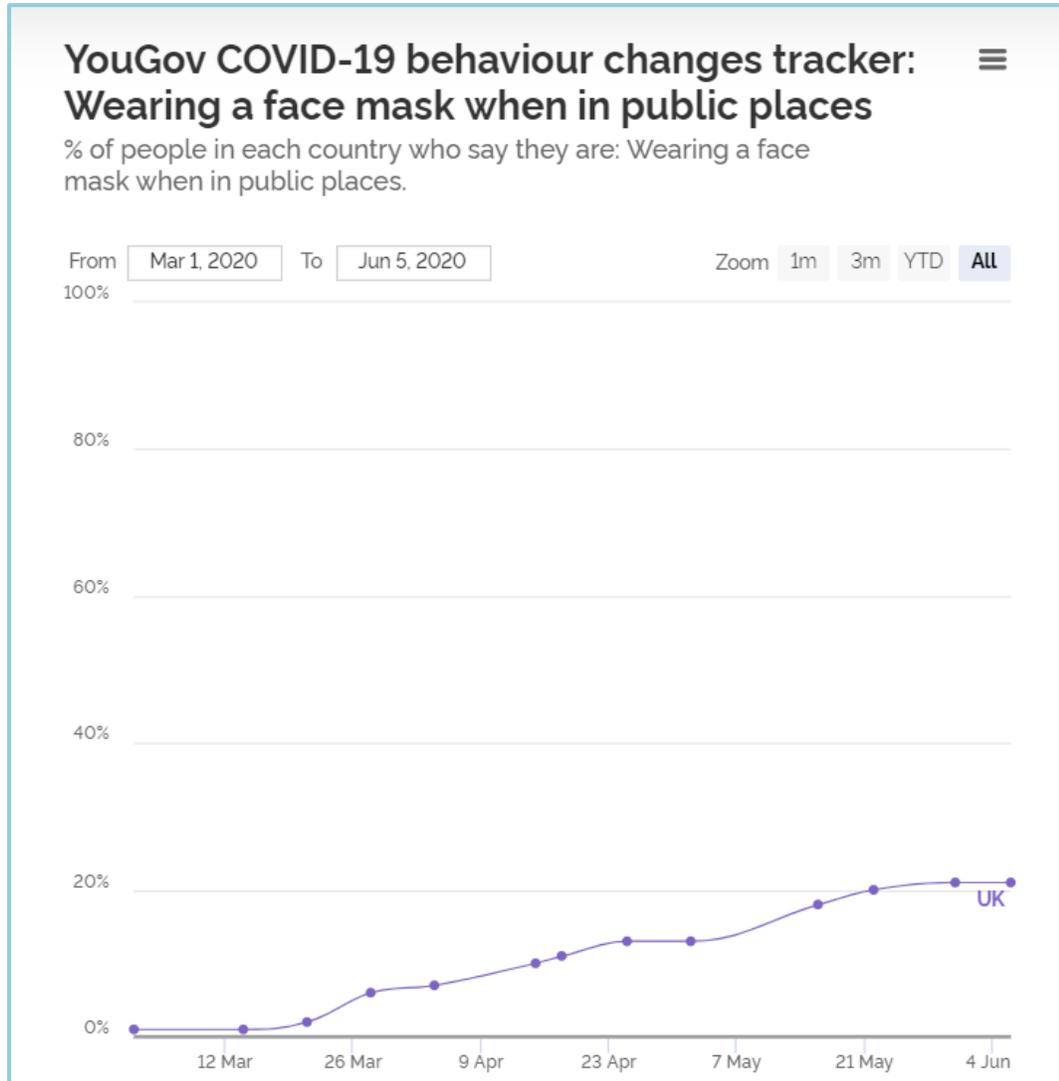
% change vs. Wave 2



*Wave 2: "Notices on website about measures on site"

■ Much more comfortable ■ A little more comfortable ■ Would make no difference ■ Less comfortable

The wearing of face masks in the UK has plateaued in recent weeks and is certainly not ingrained within our culture. However, 3% spontaneously referred to face masks when asked about their feelings on visiting attractions



All visitors and staff should wear face masks. My biggest concern is that these sort of basic precautions will not be implemented or enforced. If these sort of sensible rules are not in place whilst the risk of infection is still high then we will not be going.

I would be scared to attend unless everyone wore masks.

Will go as much as I did before, I will wear a face mask and try and keep away from other people as much as I can

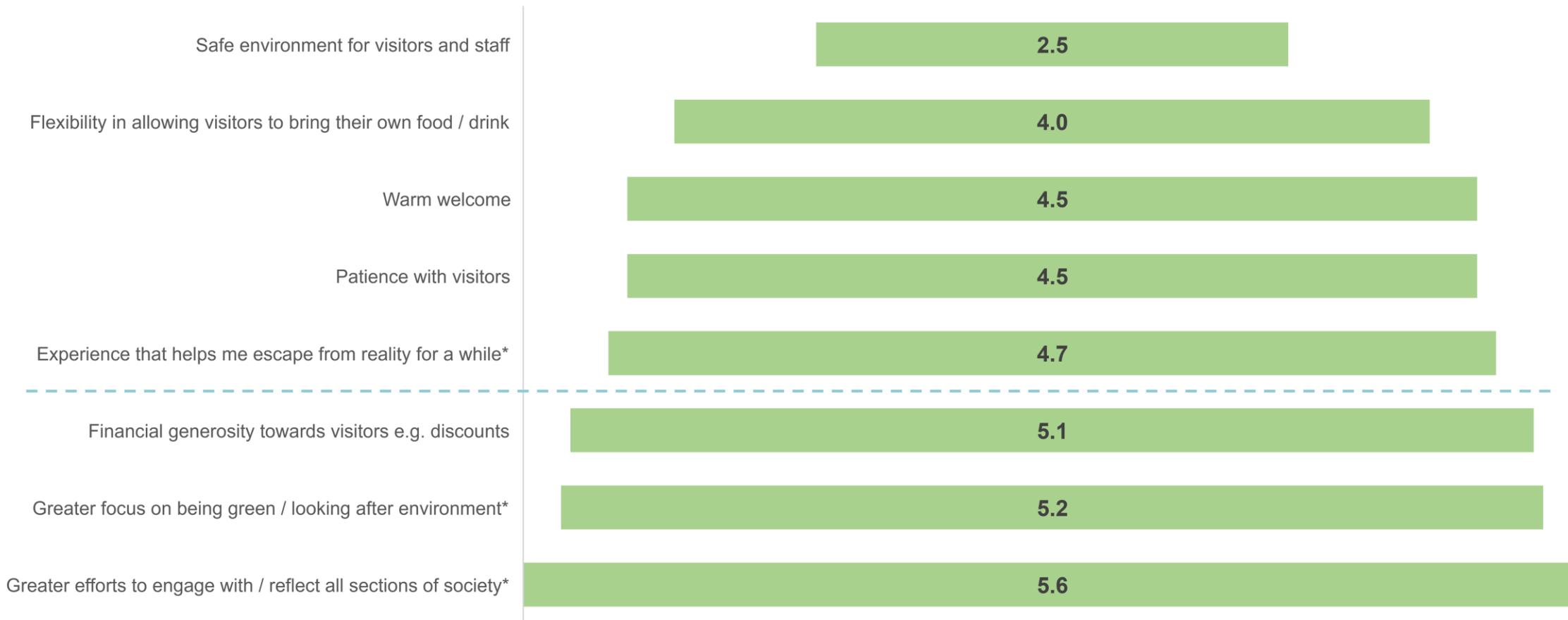
I would wanted limited people in time slots and masks to be compulsory

Visitors are focussed on the short term at present – overwhelmingly about safety, but also about wellbeing. Wider societal issues are for another day in the eyes of visitors

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



**New characteristic for Wave 3*

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 3 (750)



Key take-outs

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Key take-outs / 1 *(Wave 3: 9-12 June)*

There has been strong improvement in visit confidence in early June, driven primarily by successful opening of some outdoor attractions and the media coverage around zoos and safari parks

10% of the attractions-visiting market – **an estimated 4m adults** – have already made a visit after re-opening, mainly to country parks (3.0m) but also to gardens (1.5m). Early returning is.....

-more likely among younger people aged 16-34 years
-not just among those who visit attractions frequently; local people desperate for a 'different' trip out?

However, confidence in visiting indoor attractions has declined since the start of lockdown. The importance of implementing and communicating safety measures in these environments will be even more important when re-opening

The main visit barrier is increasingly around worries about fellow visitors adhering to distancing measures or attractions' ability to enforce these measures. How can we demonstrate and communicate that these are working well in our attractions?

Evidence that the '**advanced booking only**' approach is successfully reassuring potential visitors: the limited capacity this implies indicates 'control', providing reassurance on crowds, distancing and queuing

Key take-outs / 2 *(Wave 3: 9-12 June)*

The lack of a full visitor offer will be a significant visit barrier on re-opening. In the eyes of potential visitors, providing as complete an experience as possible, applying appropriate safety measures, is preferable to keeping elements closed

Toilets are currently in the 'high priority but high anxiety' area for visitors – half will not visit an attraction at all if these are closed, but safety measures are hugely important in building confidence in their use. It's not enough just to open toilets with no safety measures – key for pre-visit communication

Indoor catering outlets and interactive visit elements are the two other visit experience areas generating most anxiety around use. Again, preferable to make available with mitigating measures than keep closed

Anxiety around using facilities at indoor attractions is higher among older people – starting as young as 55. Measures at indoor attractions with older age profiles are even more important to apply and communicate

Visitors are focussed on the short term at present – overwhelmingly about safety, but also about wellbeing. Wider societal issues are for another day in the eyes of visitors

Next steps / 1

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

- 🕒 When more sections of the wider economy open up
- 🕒 When the public has firmer details about the timing of the re-opening of indoor attractions
- 🕒 After re-opening, as the public reacts to the new visiting environment and initial successes or otherwise

Incorporate any new issues as they emerge

Update on *ALVA Visitor Recovery Benchmarking* initiative

ALVA Visitor Recovery Benchmarking

ALVA

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.

A reminder:

- 🕒 Visitor tracking survey to understand how your visitors are feeling about new safety measures, staff, impact on visit experience, as well as how visitor profile, motivations and comms triggers have changed in this period
- 🕒 Online post-visit survey sent to visitors
- 🕒 Results via online dashboard on a shared basis
- 🕒 Low cost - £750 per attraction, with large discounts for multiple attractions

This will be going ahead: c.25 attractions committed plus conversations with many more, UK-wide

Launch mid-July and potentially running until Xmas 2020, depending upon demand

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

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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 -

Questionnaire: Wave 3 (9-12 June)



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 when 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 when 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**
(I have already visited (the outdoor elements) since re-opening*. 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 when 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

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

FOR EACH EVER USED AT Q5B:

Q5c. We would now like you to think about the attractions you typically visit that have these facilities. If these facilities were closed or not available when the attraction re-opened, what would you do?
(I wouldn't visit the attraction at all, I would visit but the experience wouldn't be as good for me, I would visit and the experience wouldn't be much different)

- Cafes / restaurants or somewhere to buy food / drink (SHOW IF SELECTED 1-3 AT Q5b)
- Shops (SHOW IF SELECTED AT Q5b)
- Toilets (SHOW IF SELECTED AT Q5b)
- Playgrounds (SHOW IF SELECTED INDOOR OR OUTDOOR AT Q5b)
- Audioguides / headphone tours (SHOW IF SELECTED AT Q5b)
- Guided tours (SHOW IF SELECTED INDOOR OR OUTDOOR AT Q5b)
- Interactive exhibits that visitors touch in some way (SHOW IF SELECTED AT Q5b)

IF EVER USE TOILETS AT Q5B:

Q5d. Thinking about visiting the toilets at an attraction after it re-opens, how much more comfortable would each of these measures make you feel about using them? **RANDOMISE ORDER**
(This would make me feel much more comfortable, This would make me feel a little more comfortable, I would be fine using the toilets even without this measure in place, I wouldn't use the toilets even if this measure was in place)

- Social distancing measures in the entrance queue
- Actively managing the number of people in the toilets at once
- Staff permanently on hand to clean the toilets and sinks
- No automatic hand driers, just disposable paper towels

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
- An experience that helps me escape from reality for a while
- Greater efforts to engage with and reflect all sections of society
- A greater focus on being green and looking after the environment
- Flexibility in allowing visitors to bring their own food / drink

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

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