



What is the outlook for visitor attractions?

ALVA Public Sentiment Research

Fieldwork: 14-19 March 2023

ALVA



The current challenge

The attractions sector as a whole remains in a period of uncertainty

- What are the current barriers preventing the UK public from visiting attractions?
- What are the prospects for visitor admissions during the spring / summer period?
- Where are the opportunities for UK visitor growth?



How did we generate the insights?

Online research among representative sample of the UK adult public:

6-10 June 2022

1,020 survey responses

22-27 September 2022

1,017 survey responses

14-19 March 2023

1,016 survey responses

Government energy bill support announcement on 8 September

Mini-budget on 23 September

Spring budget on 15 March

Source: Aurora MR Omnibus Surveys (6-10 June, 22-27 September 2022, 14-19 March 2023)

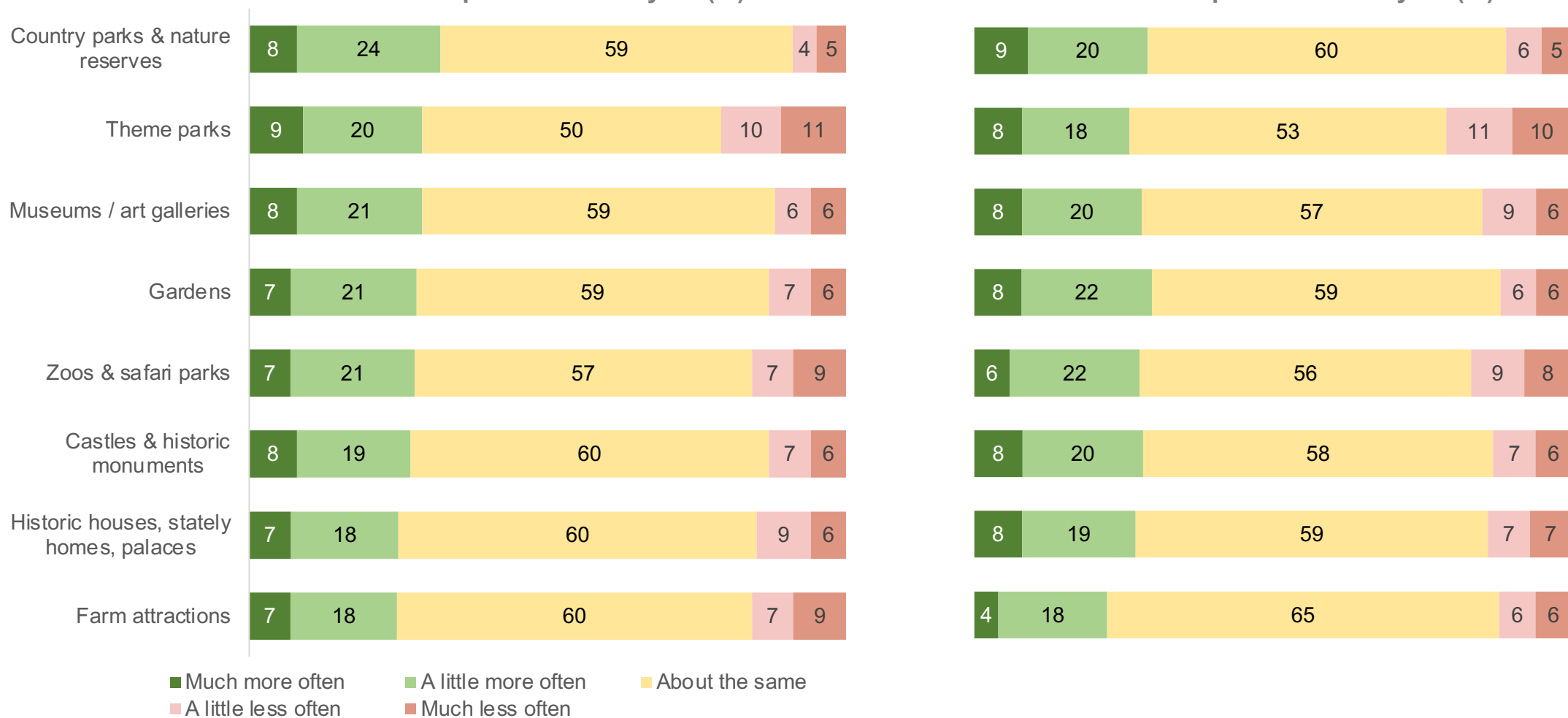
The recovery in visitor admissions is likely to continue in the coming months, with audiences more likely to say they will visit more often than in spring / summer last year. There are also indications that confidence has improved slightly since September 2022, although there remains a notable minority who will visit less often

MARCH 2023

How often will visit attraction type this SPRING / SUMMER compared with last year (%)

SEPTEMBER 2022

How often will visit attraction type this AUTUMN / WINTER compared with last year (%)

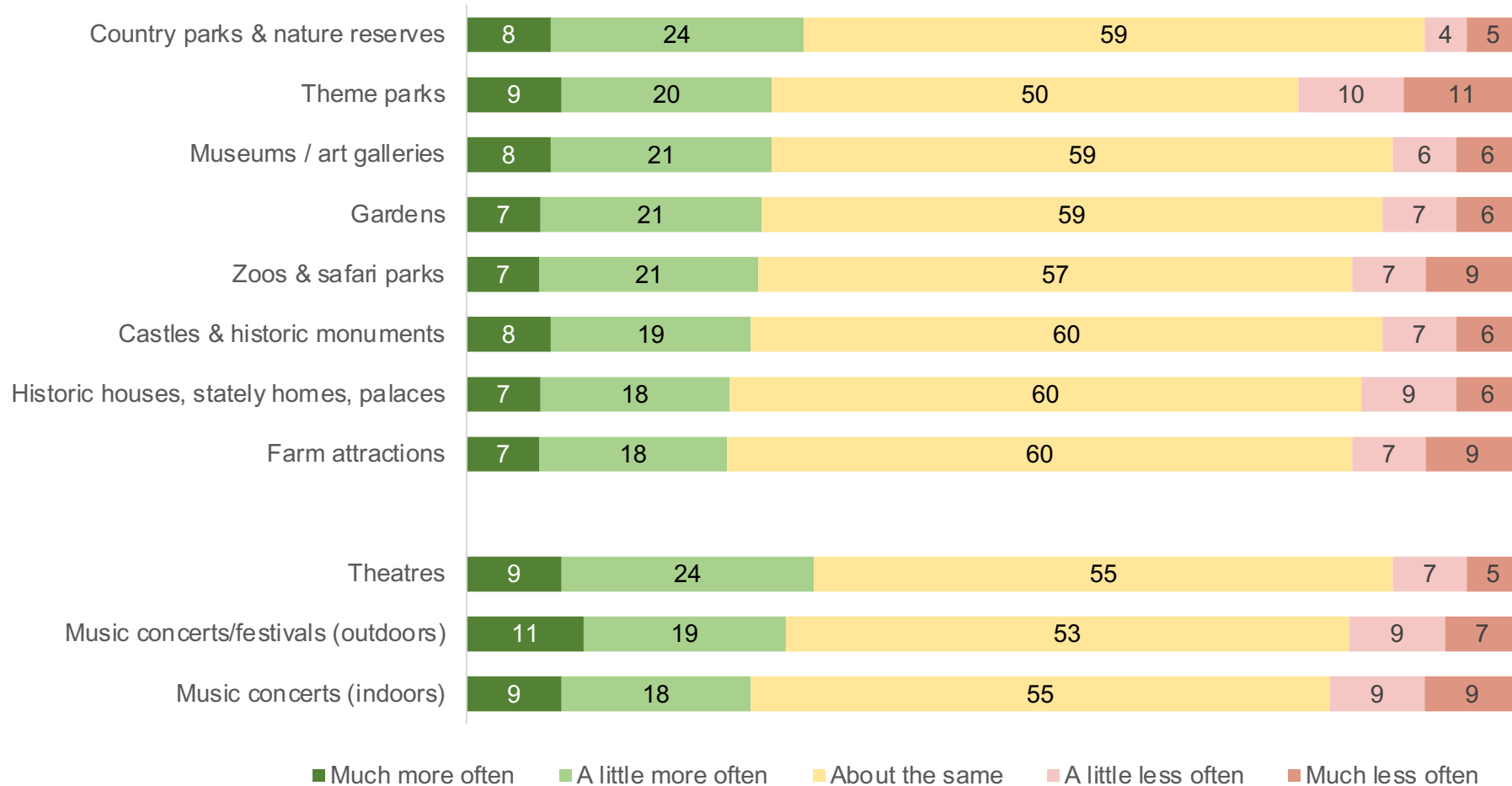


Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months compared with the same period last year?
 Bases: All who tend to visit this type of attraction

Performance venues have been taking longer than visitor attractions to recover from the pandemic, but the outlook for spring / summer now appears more promising

MARCH 2023

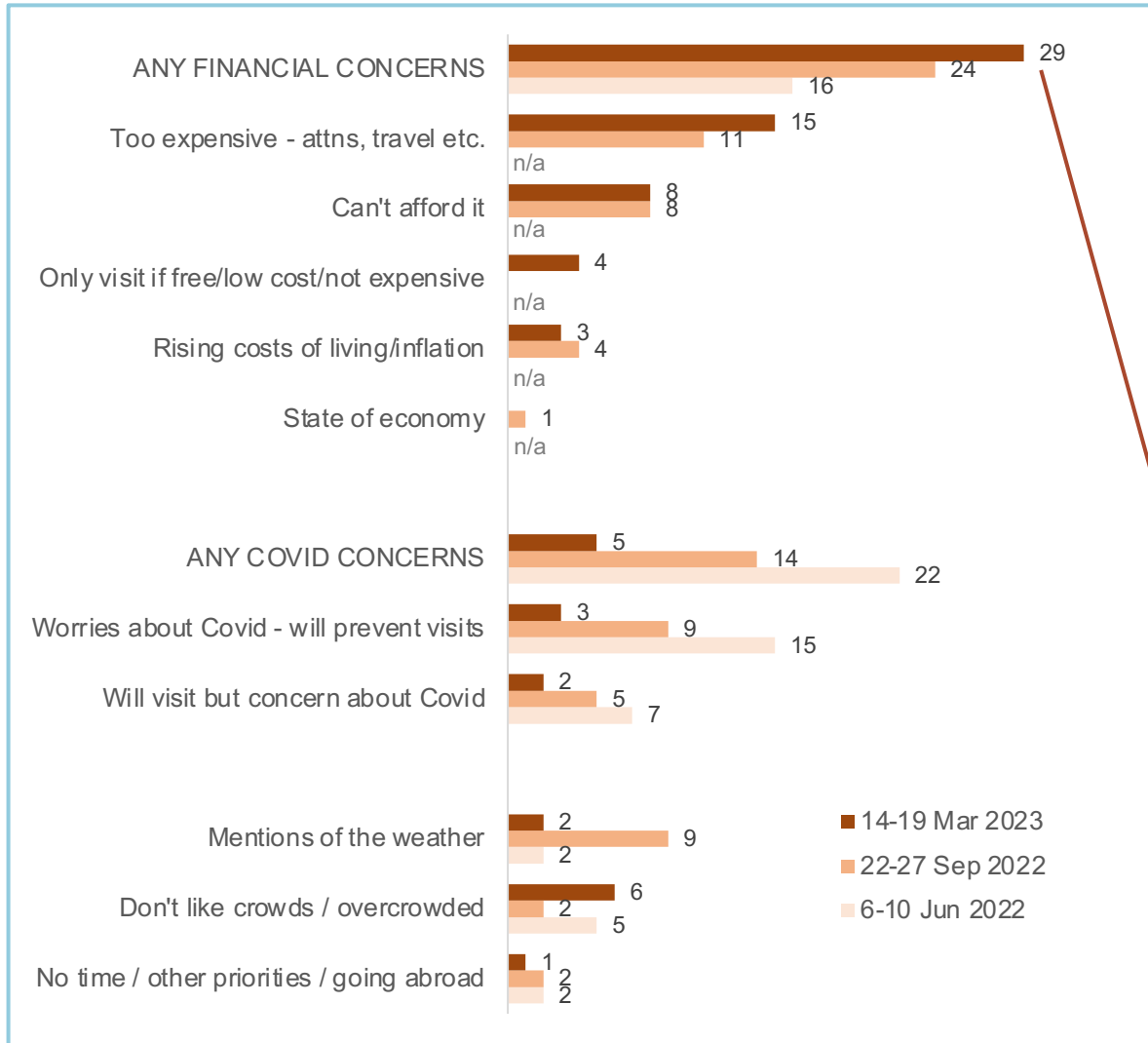
How often will visit attraction type this SPRING / SUMMER compared with last year (%)



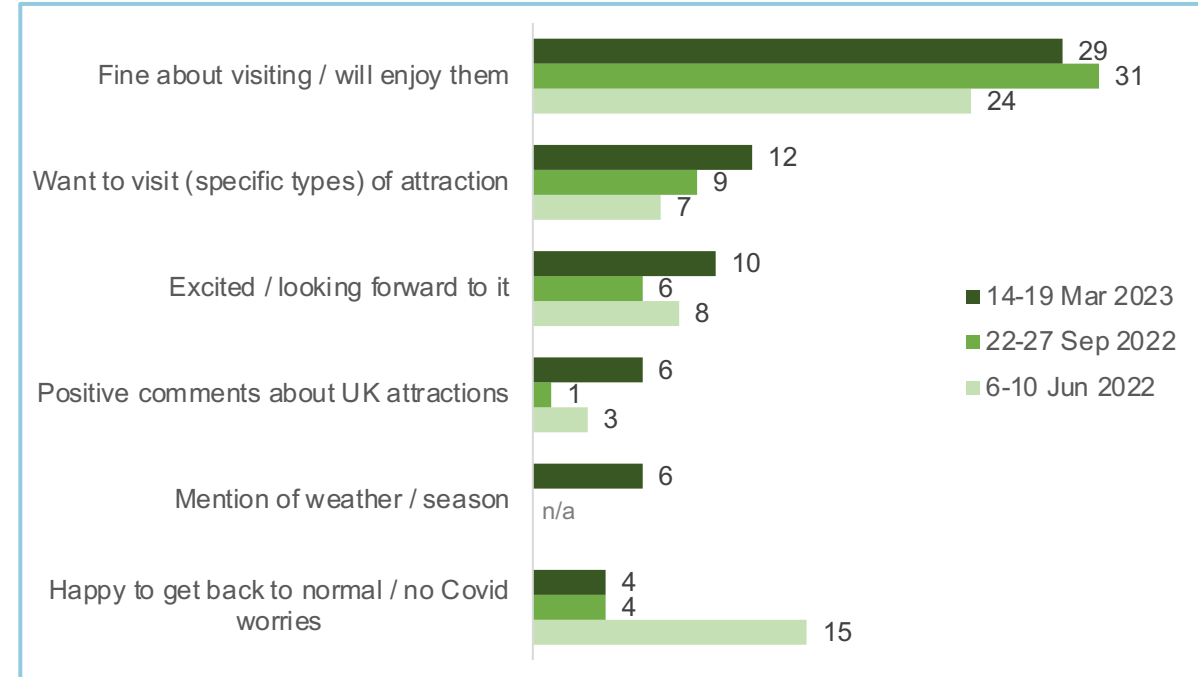
Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months compared with the same period last year?
 Bases: All who tend to visit this type of attraction

The slight improvement in confidence since September is likely to be driven by the removal of most lingering Covid concerns, although financial worries remain a barrier for over a quarter of audiences, especially 35-54s

% spontaneously expressed CONCERNS about visiting:
44% Jun 2022, 52% Sep 2022, 41% Mar 2023



% spontaneously expressed POSITIVES about visiting:
58% Jun 2022, 52% Sep 2022, 64% Mar 2023



	Aged 16-34	Aged 35-54	Aged 55+
Any financial concerns	24%	39%	26%

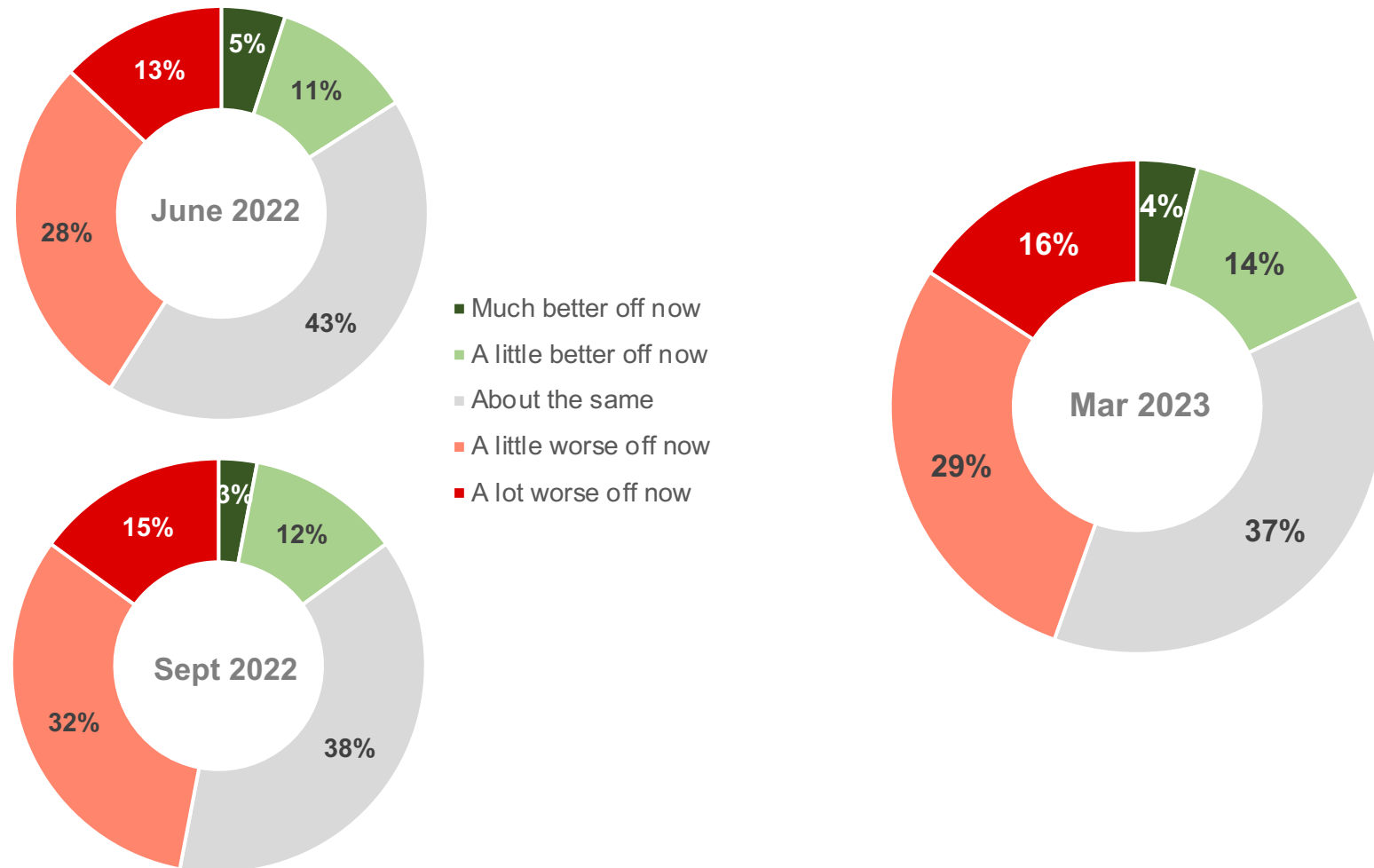
	Children	No children
Any financial concerns	31%	27%

Q: Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so.

Bases: All respondents expressing an opinion (Jun 2022=796, Sep 2022=810, Mar 2023=812)

Almost half of the public still feel worse off than they did a year ago, although this has slightly improved since September 2022

How personal financial situation compares with about a year ago (%)

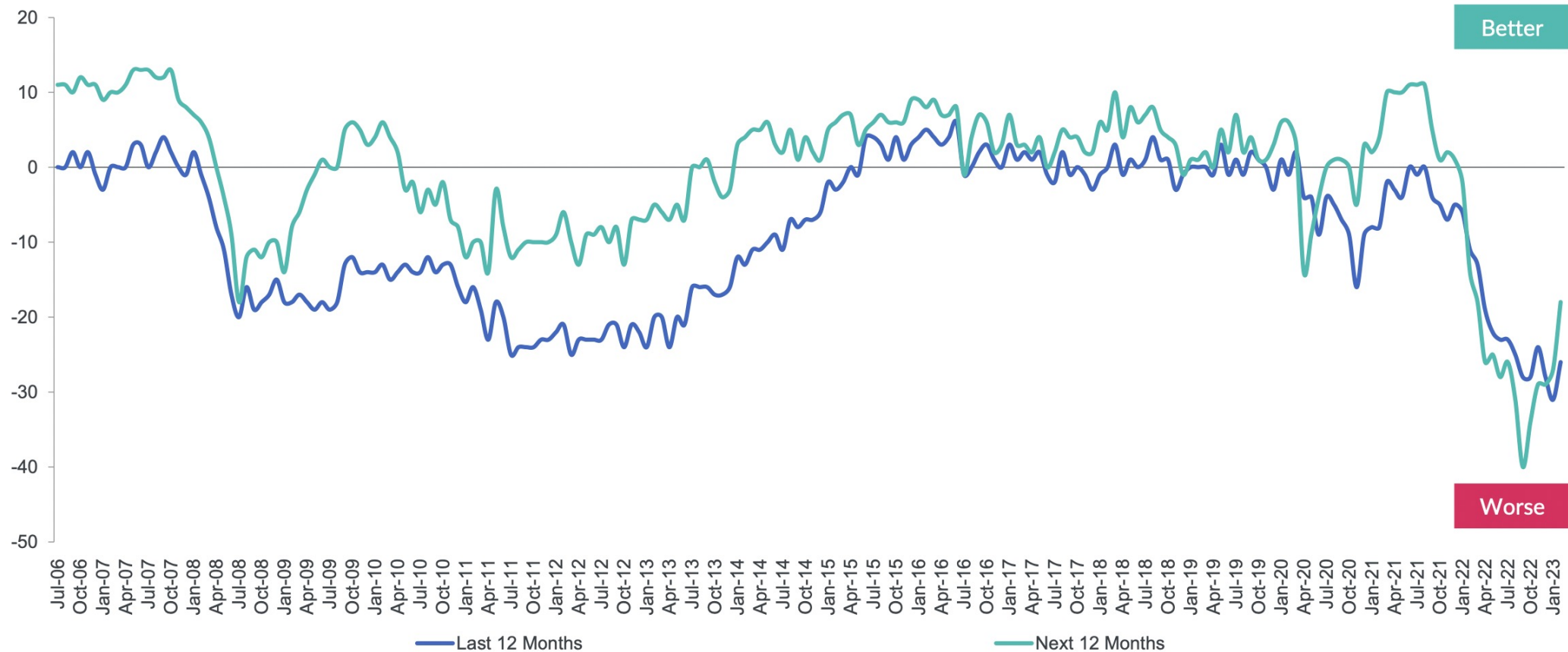


Q: Thinking about your financial situation now, how does this compare with about a year ago?

Base: All respondents (Jun 2022=1,016, Sep 2022=1,008, Mar 2023=1,007)

Indeed, whilst consumer confidence remains low, the *UK Consumer Confidence Barometer* shows that the public may be starting to see the light at the end of the tunnel in terms of their own financial situation

Personal financial situation of household

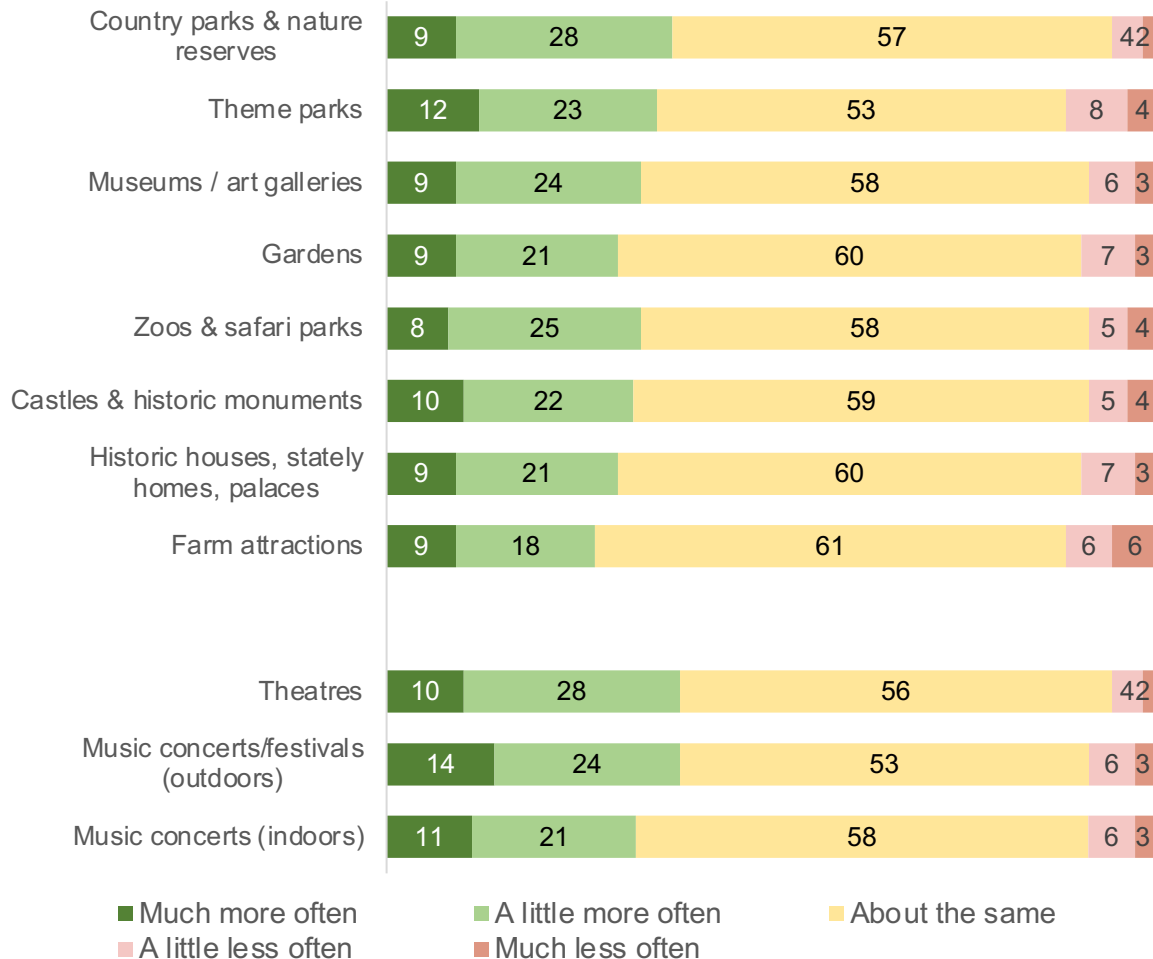


Q1 How has the financial situation of your household changed over the last 12 months? Got a lot better = 1 / Got a little better = 0.5 / Stayed the same = 0 / Got a little worse = -0.5 / Got a lot worse = -1;
Q2 How do you expect the financial position of your household to change over the next 12 months? Get a lot better = 1 / Get a little better = 0.5 / Stay the same = 0 / Get a little worse = -0.5 / Get a lot worse = -1

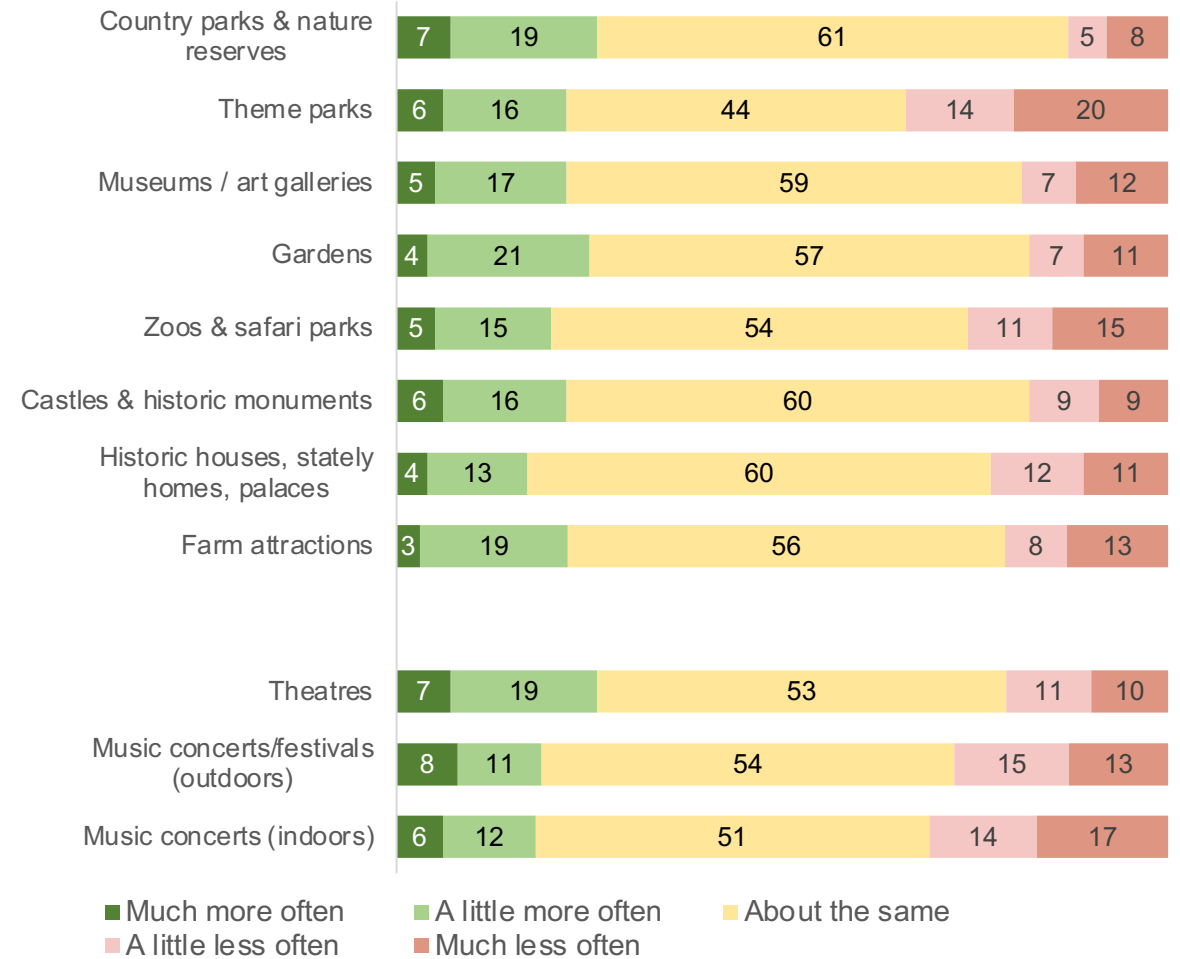
We can see that audiences' financial situation is the key driver of likely attraction visiting during spring / summer, with those feeling financially worse off much more likely than others to say that they will visit attractions less often – particularly the sectors with typically higher priced admissions

How often will visit attraction type this SPRING / SUMMER compared with last year (%)

Feel better off / same financially (%)



Feel worse off financially (%)



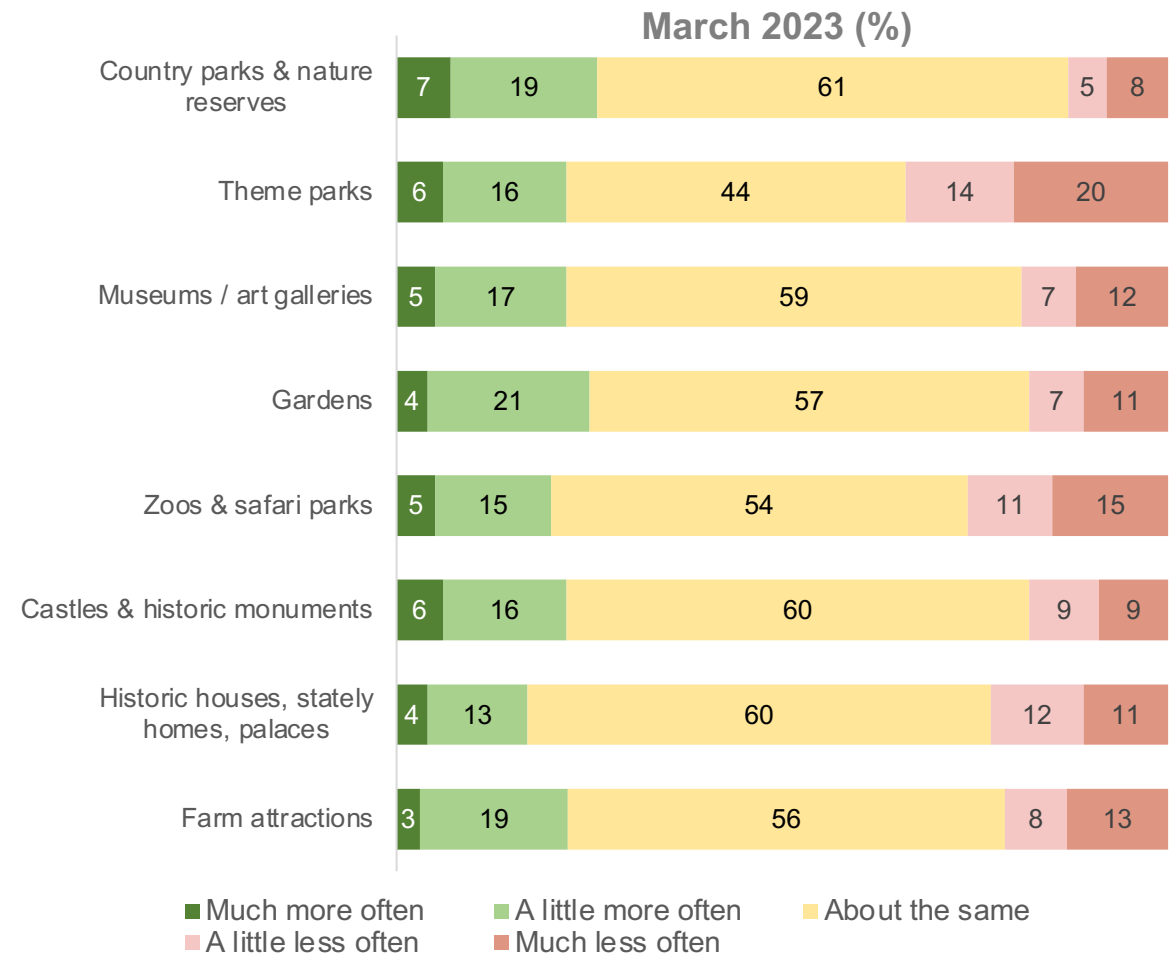
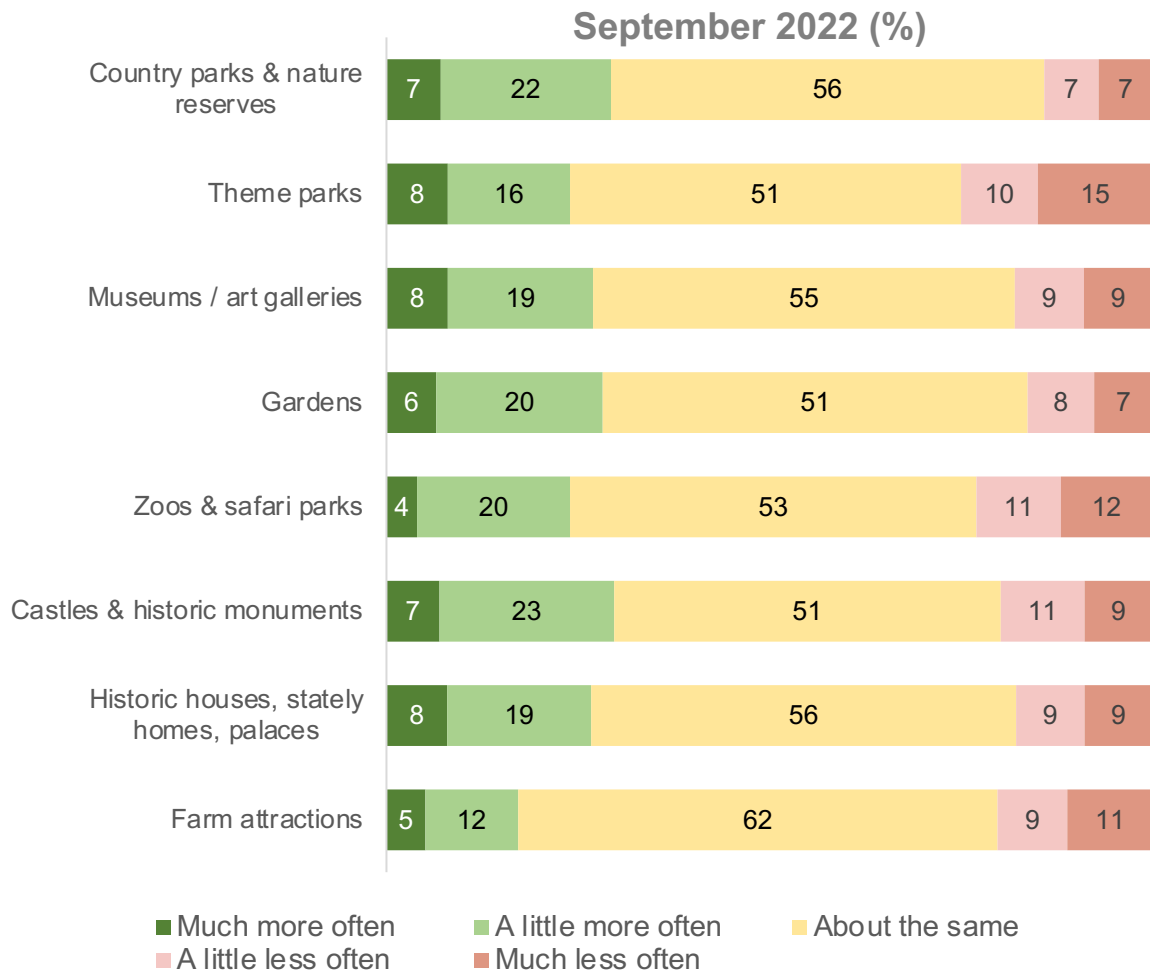
Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months (spring/summer 2023) compared with the same period last year?

Bases: All who tend to visit this type of attraction

Whilst audiences' visit confidence might be slightly improving overall, among those feeling worse off financially (almost half of the public), this confidence in visiting attractions in spring / summer is much more precarious

How often will visit attraction type in next few months compared with last year (%)

Base: those feeling worse off financially

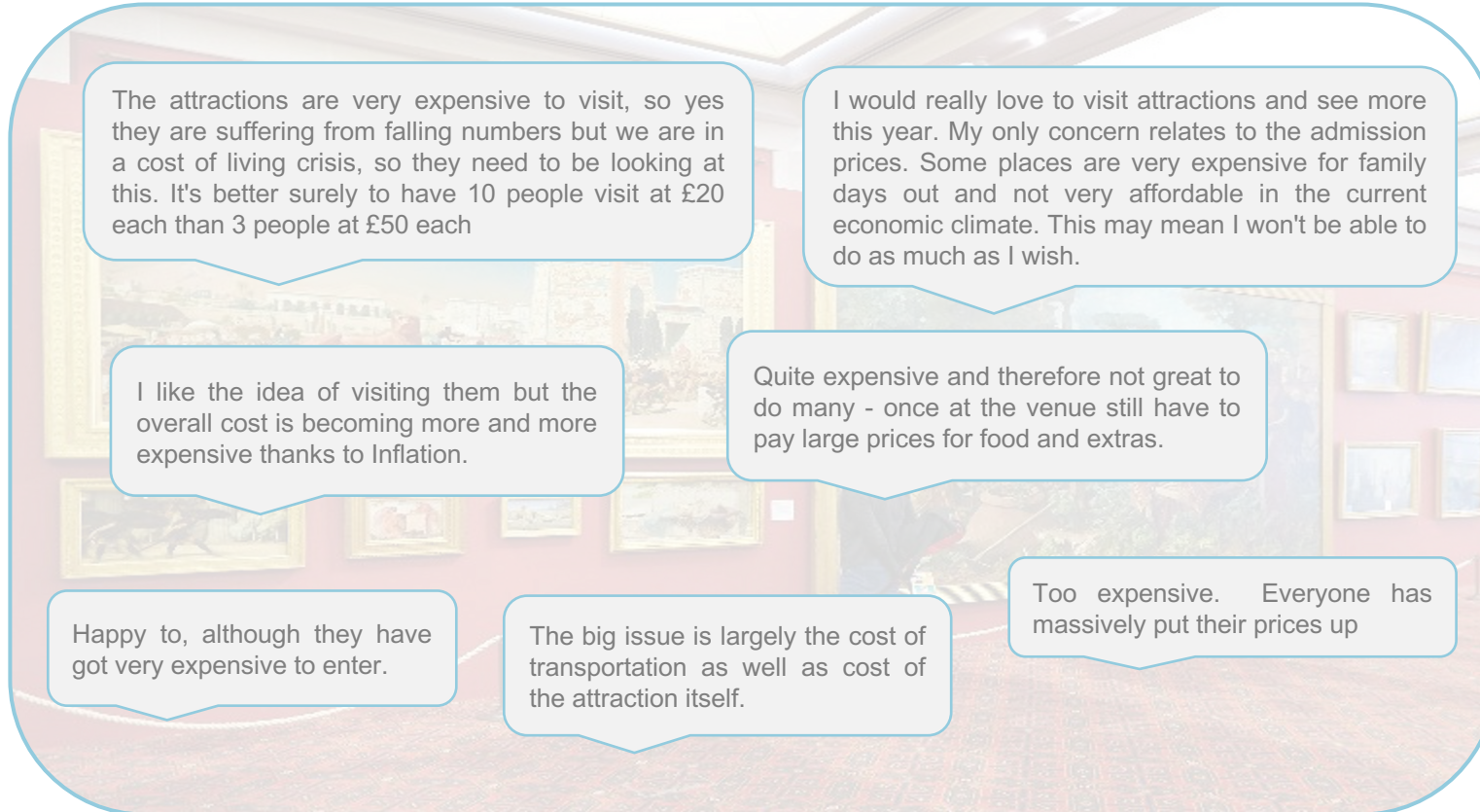


Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to the end of February 2023) compared with the same period last year?

Bases: All who tend to visit this type of attraction

There appears to be an increasing perception that visitor attractions are becoming too expensive. 'Value' messages are likely to remain important in the lead up to spring/ summer – online discounts, vouchers, memberships / annual passes etc.

**Too expensive – attractions, travel, accommodation etc.
(11% in September 2022, 15% in March 2023)**



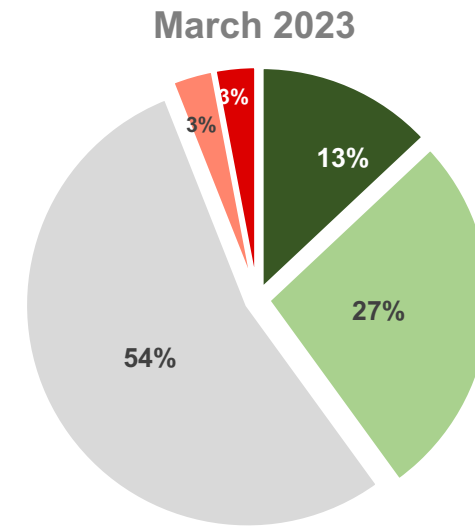
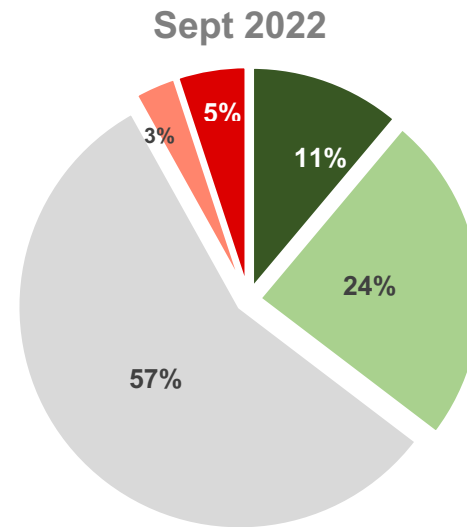
Q: Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so.

Bases: All respondents expressing an opinion (March 2023=812)

The appetite to visit free attractions seems to have grown further since September 2022, but the negative impact upon paid attractions seems to have stabilised a little overall

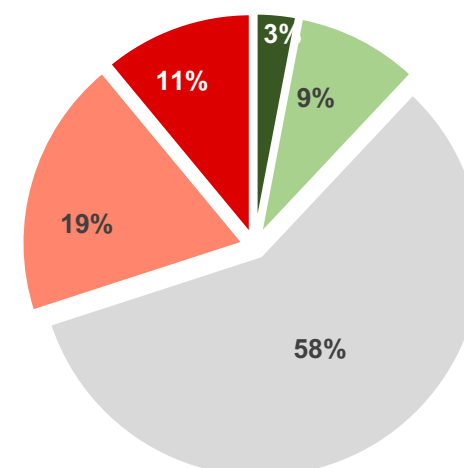
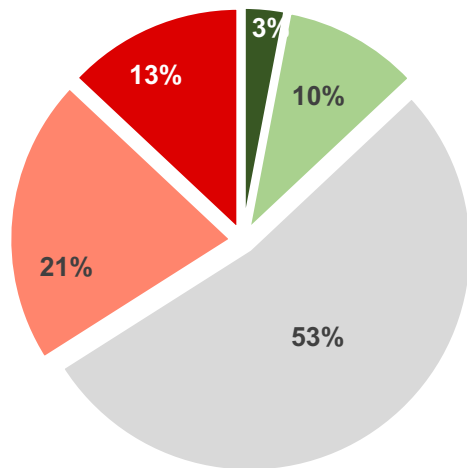
How personal financial situation will affect visits to.....

**FREE
ATTRACTIONS**



■ Will visit much more than usual
 ■ Will visit a little more than usual
 ■ Make no difference
■ Will visit a little less than usual
 ■ Will visit a lot less than usual

**PAID
ATTRACTIONS**



Q: And how do you think that your financial situation will affect each of the following in the next few months?

Base: All respondents who visit each type of attraction

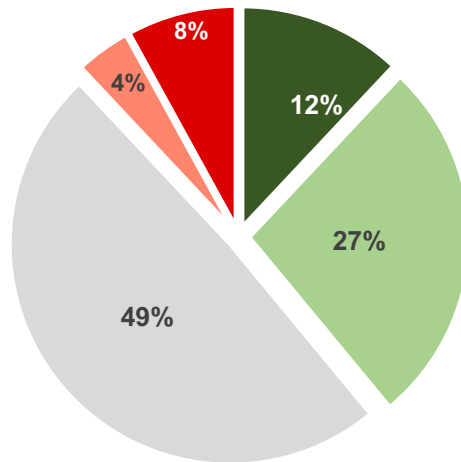
However, among those feeling financially worse off, the switch from paid to free attractions has accelerated, with no stabilisation in the negative impact upon paid attractions

THOSE FEELING FINANCIALLY WORSE OFF

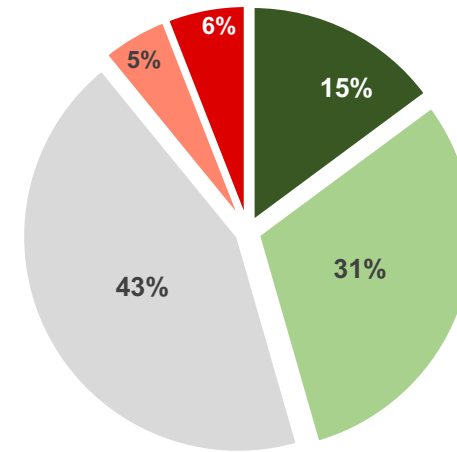
How personal financial situation will affect visits to.....

FREE ATTRACTIONS

September 2022

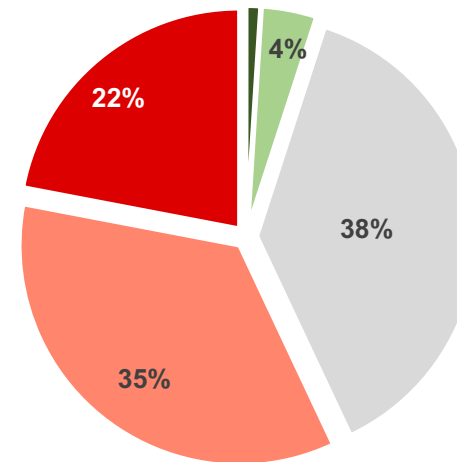
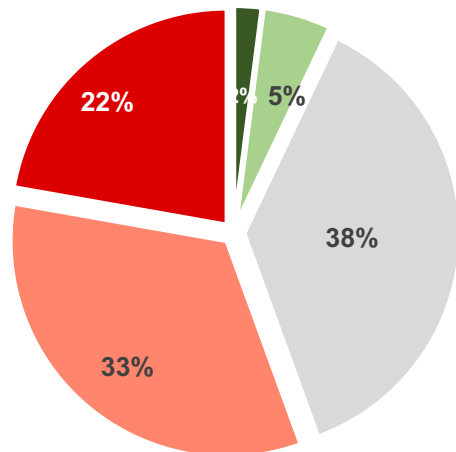


March 2023



■ Will visit much more than usual
 ■ Will visit a little more than usual
 ■ Make no difference
■ Will visit a little less than usual
 ■ Will visit a lot less than usual

PAID ATTRACTIONS



Q: And how do you think that your financial situation will affect each of the following in the next few months (up to February 2023)?

Base: All respondents feeling financially worse off who visit each type of attraction

Since September 2022, there is a segment that has emerged who will be consciously seeking out free, low cost, inexpensive experiences as a result of their financial situation

Only visit if free / low cost / not expensive (4%)

On an even tighter budget than usual, so most will have to be free!!! However, I have redeemed some Tesco Clubcard points to visit 'Paradise Park' in Newhaven.

I am looking forward to visiting attractions although i am looking to spend less so will be more open to low cost days or days using vouchers to keep costs down

Any attractions I go to visit will have to be free entry or very cheap entrance fee, as I don't have a lot of money to spare right now.

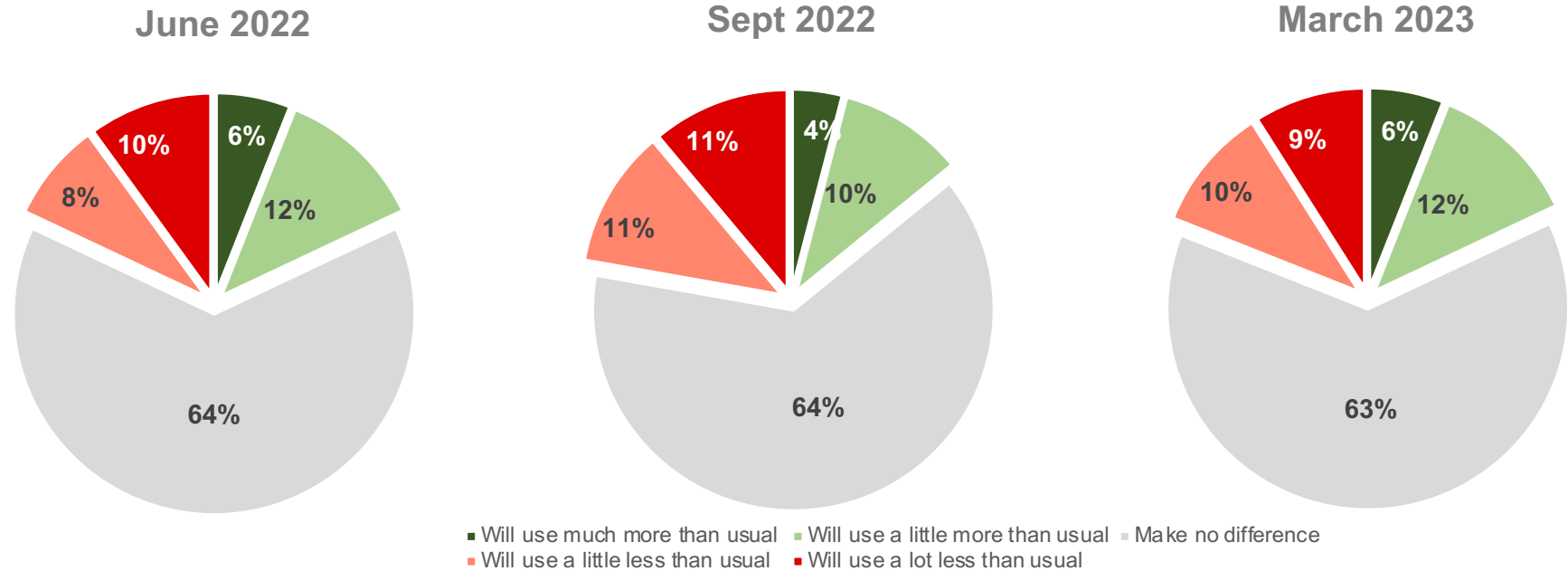
Money has made things difficult to visit anywhere that has attractions unless they are free

if I am near and they are free i will look in but do not have cash to spare

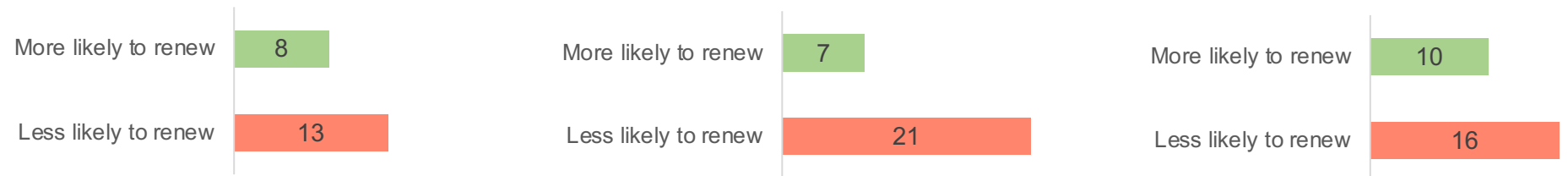
The outlook for memberships / season passes has also improved slightly since September, with existing members now more likely to use and renew in the coming months as a result of their financial situation

How personal financial situation will affect HOLDERS OF MEMBERSHIPS / SEASON PASSES

USAGE



RENEWAL



Q: How do you think that your financial situation will affect each of the following in the next few months?

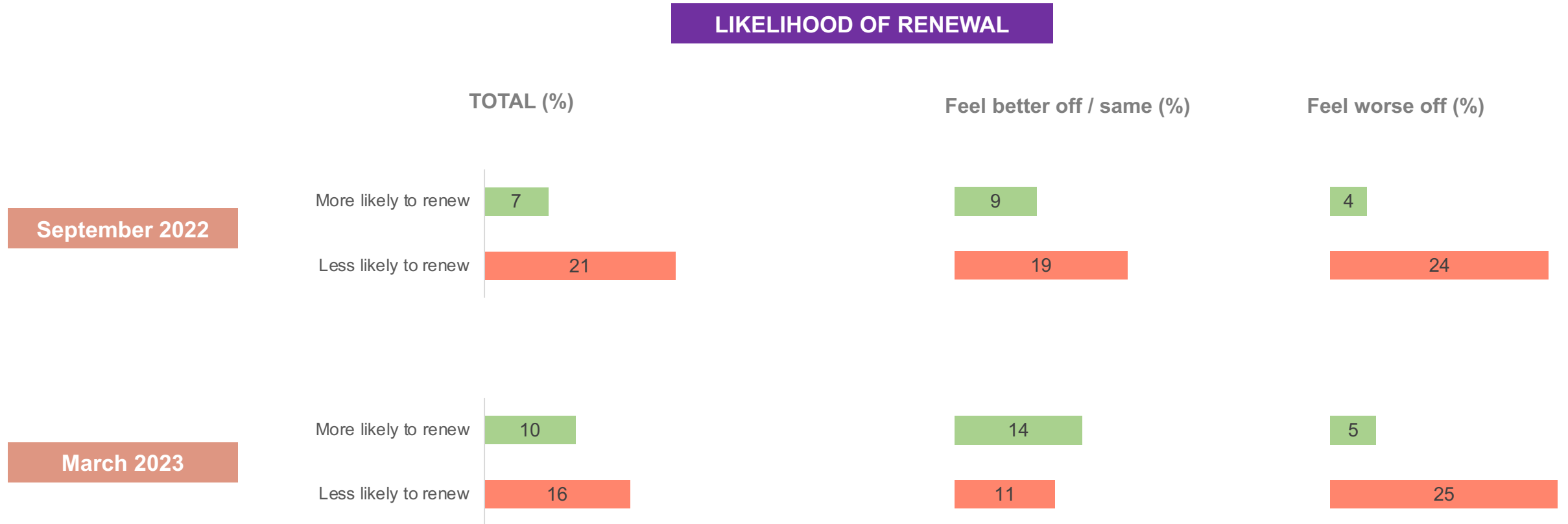
Q: Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months?

Base: All respondents who have membership / season pass (June 2022=637, Sept 2022=613, Mar 2023=602)

Once again, this improvement in the outlook for memberships is being driven solely by those whose financial situation is more positive

How personal financial situation will affect HOLDERS OF MEMBERSHIPS / SEASON PASSES

LIKELIHOOD OF RENEWAL



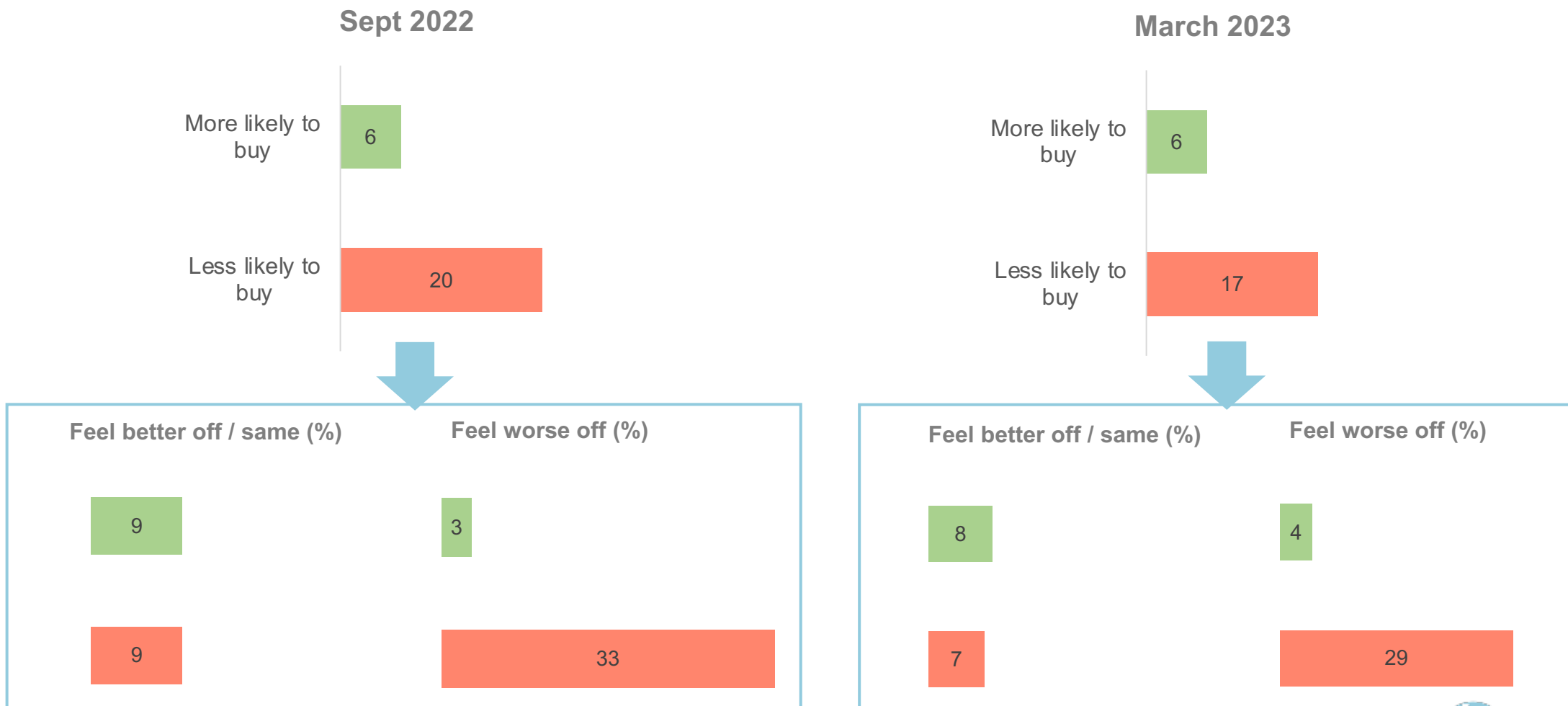
Q: Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months?

Base: All respondents who have membership / season pass (613)

Acquiring new members / season pass holders is likely to continue to be a challenge in the coming months, particularly among that 50% of the UK public who feel worse off

How personal financial situation will affect ACQUISITION OF MEMBERSHIPS / SEASON PASSES

PURCHASE NEW

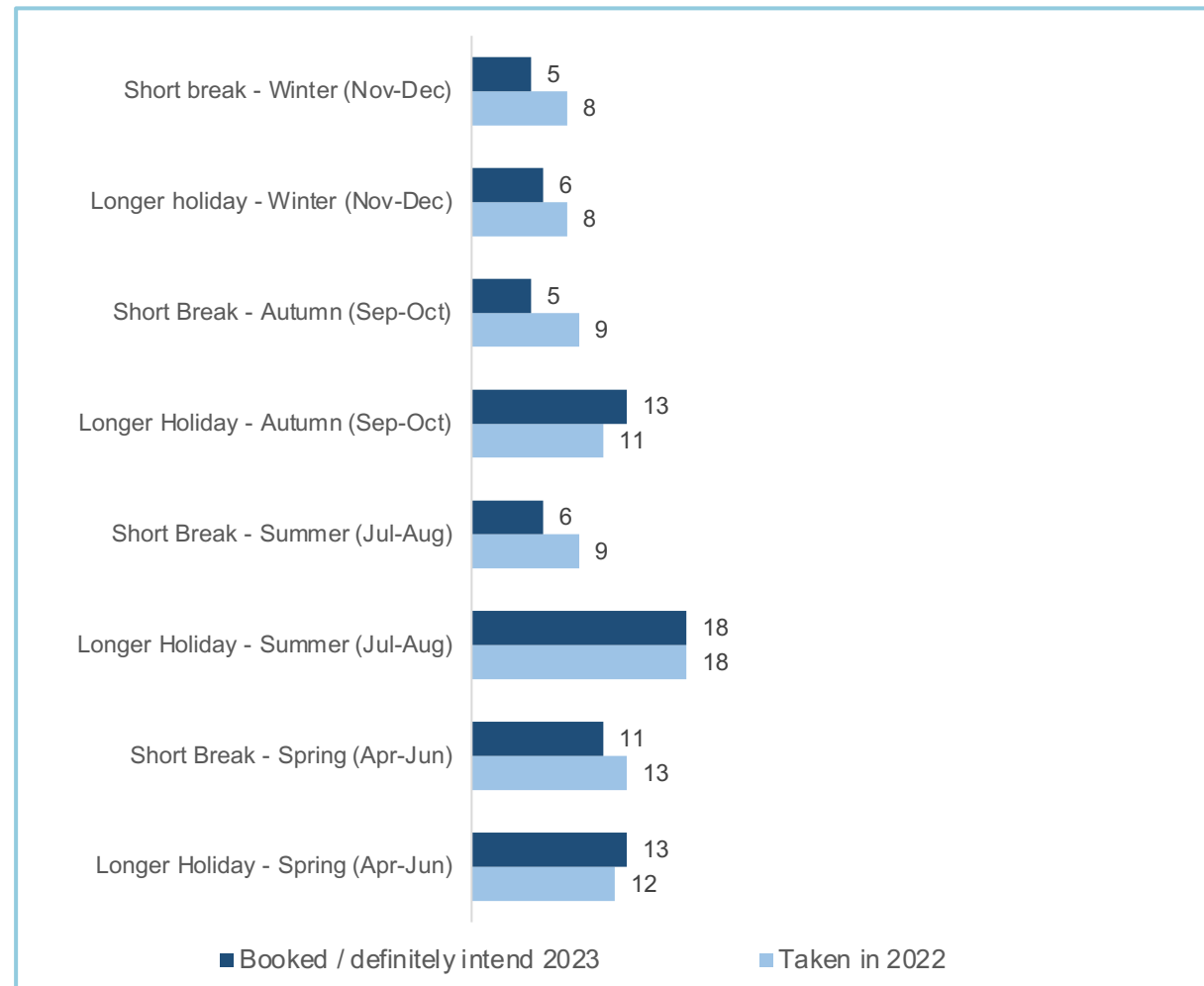
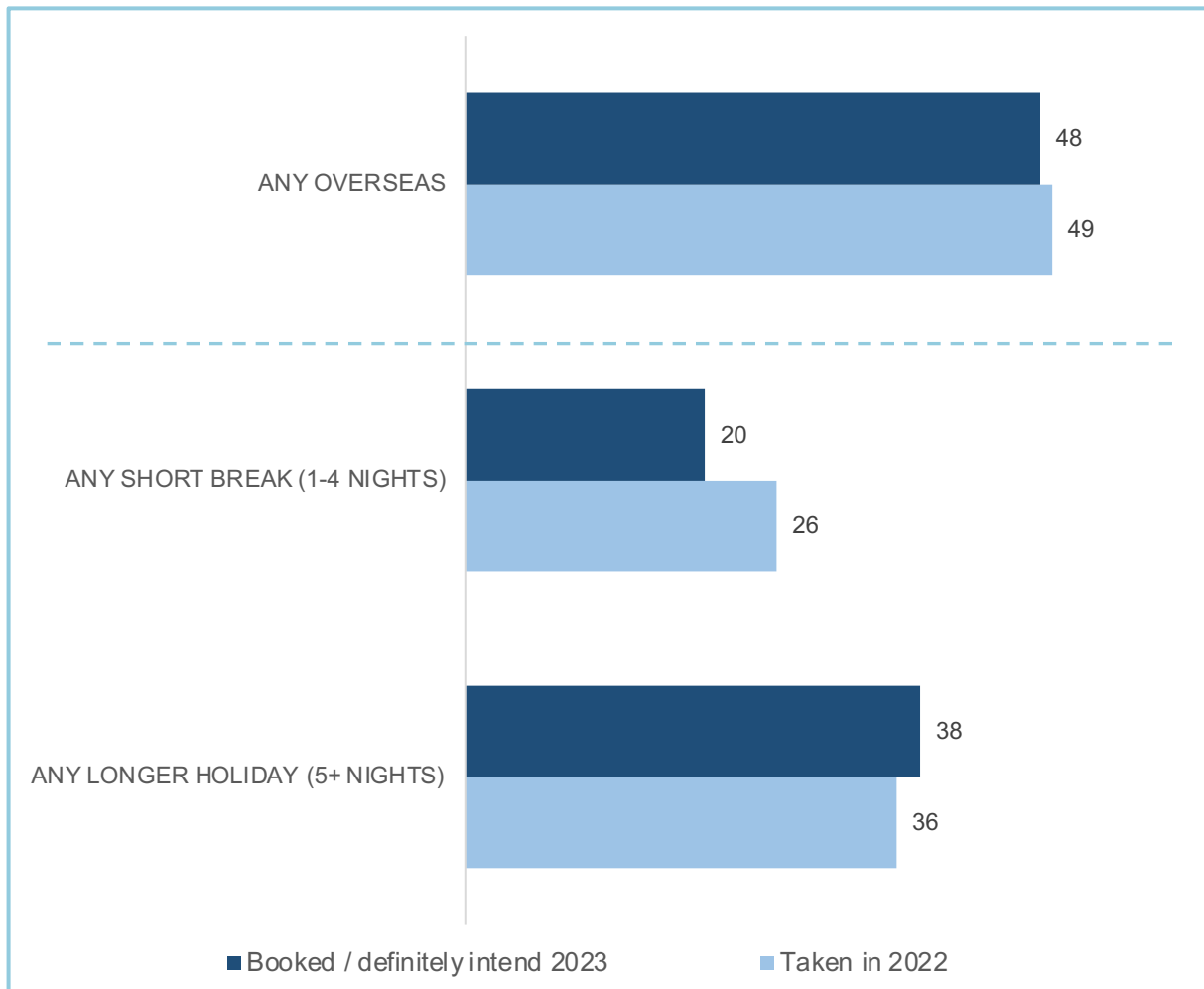


Q: Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months?

Base: All respondents (Jun 2022=1,020, Sep 2022=1,017, Mar 2023=1,016)

There is increased appetite for taking longer overseas holidays of 5+ nights during 2023, but less inclination to take overseas short breaks

OVERSEAS holiday taking in 2023 (%)



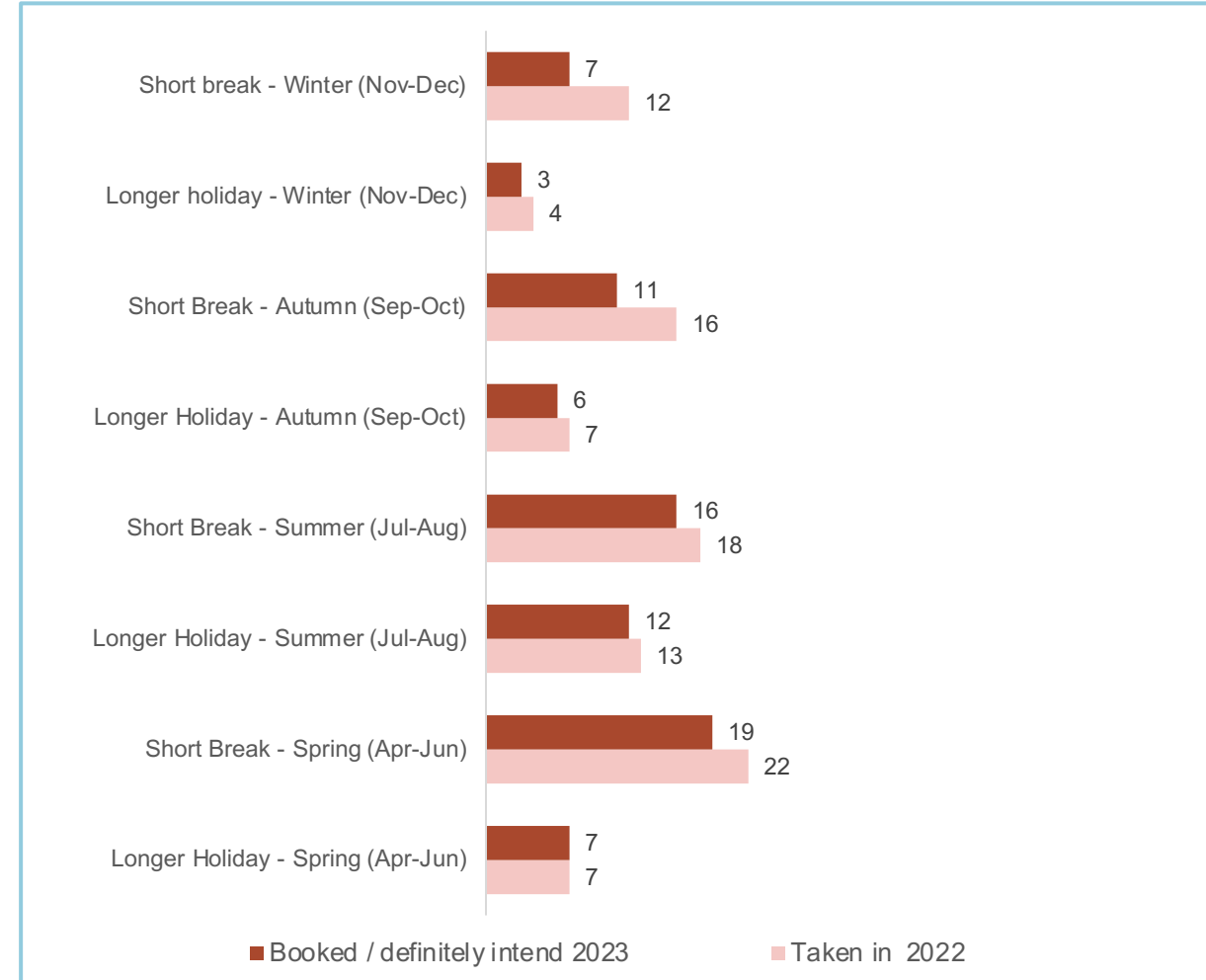
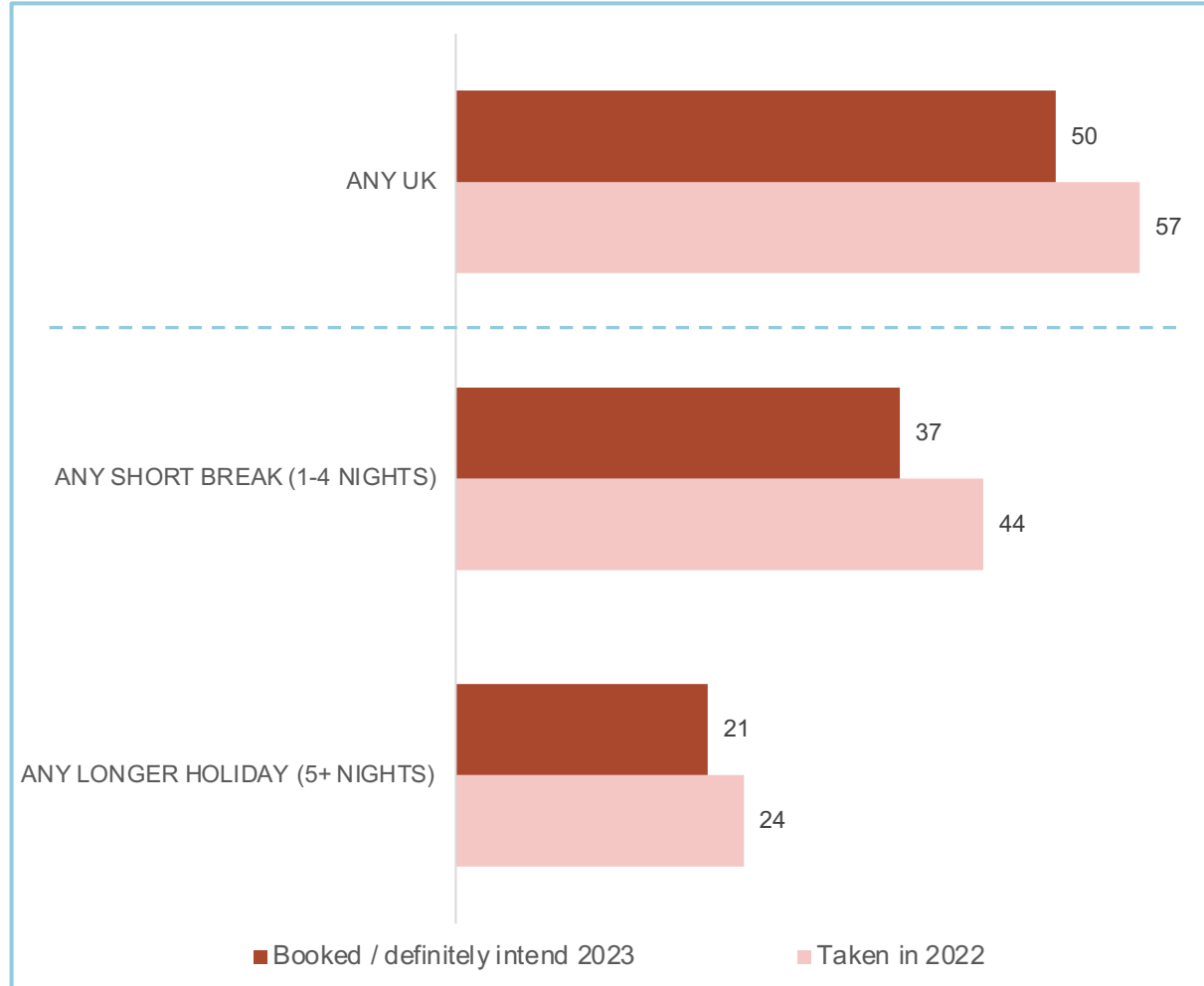
Q: Thinking about this year, which of these types of overseas holidays have you booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation.

Q: Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation.

Bases: All respondents (1,016)

At this stage of the year, it appears that the appetite for domestic holidays – both longer holidays and especially short breaks – will be lower than during 2022. However, we need to remember that there is an increasing trend toward late bookings

UK holiday taking in 2023 (%)



Q: Thinking about this year, which of these types of overseas holidays have you either already taken, booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation.

Q: Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation.

Bases: All respondents (1,016)



Key take-outs

ALVA



Key take-outs

The recovery in visitor admissions is likely to continue in the coming months, with audiences more likely to say they will visit attractions more often than they did during spring/summer last year – mainly driven by reduction in lingering Covid concerns

There are also indications that appetite for visiting has improved slightly since September 2022, although there remains a notable minority saying they will visit less often – driven by deepening concerns about their own financial situation

29% of the public now spontaneously mention financial concerns when asked how they feel about visiting attractions compared with 24% in September 2022, with 35-54 year olds and families most likely to mention these concerns

There is increasing evidence that overall, the public are beginning to see the light at the end of the tunnel of their financial concerns. However, this is very much being led by those whose financial situation is better. Among the half of the public who feel worse off, the situation is if anything, worsening and the gap in visit confidence between the two groups is widening

If attractions need to attract those who feel worse off, promoting a 'value' message this spring / summer will be key – online discounts, vouchers, memberships / annual passes etc. – as low confidence turns into conscious actions to cut back

Appetite for visiting free attractions appears to have accelerated and the negative impact on visiting paid attractions has stabilised, although again, has become slightly worse among those feeling worse off than a year ago

The outlook for memberships / season passes has improved slightly since September, with existing members now more likely to use and renew. Again however, this improvement is driven solely by those whose financial situation is more positive

The return of longer overseas holidays and a diminished appetite for domestic holidays (especially short breaks in the shoulder seasons) is also likely to impact attractions reliant upon the staying away audience, although this may present opportunities for those with a more local, day trip audience

Contact

Steve Mills, *Director*



+44 (0) 7532 666884



steve.mills@decisionhouse.co.uk

www.decisionhouse.co.uk



@decision_house

Questionnaire: 6-10 June 2022



ALVA PUBLIC SENTIMENT RESEARCH QUESTIONNAIRE – JUNE 2022

SAMPLE DEFINITION:

- UK adults aged 16 or over

INTRODUCTORY TEXT: [The next few questions are about recent holidays you may have taken and any that you have planned for the next few months.

Q1a. Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

Short break (1-4 nights away) in Spring 2021 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2021 (Apr-Jun)
Short break (1-4 nights away) in Summer 2021 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2021 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Did not take an overseas holiday in 2021

Q1b. And still thinking back to last year, which of these types of holidays did you take, in the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

Short break (1-4 nights away) in Spring 2021 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2021 (Apr-Jun)
Short break (1-4 nights away) in Summer 2021 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2021 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Did not take a holiday in the UK in 2021

Q2a. Now thinking about this year, which of these types of overseas holidays have you either already taken, have booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation. MARK ALL THAT APPLY

Short break (1-4 nights away) in Winter 2022 (Jan-Mar)
Longer holiday (5 or more nights away) in Winter 2022 (Jan-Mar)
Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Have not taken nor intend to take an overseas holiday in 2022

Q2b. And still thinking about this year, which of these types of holidays have you either already taken, have booked or definitely intend to book in the UK? By holiday, we mean a leisure trip where you stay in paid accommodation. MARK ALL THAT APPLY

Short break (1-4 nights away) in Winter 2022 (Jan-Mar)
Longer holiday (5 or more nights away) in Winter 2022 (Jan-Mar)
Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Have not taken nor intend to take holiday in the UK in 2022

The next few questions are about your feelings on the subject of visiting attractions in the UK. 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.

Q3. Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so. Please give as much detail as possible.
OPEN RESPONSE

Q4. How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to the end of October) compared with the same period last year? RANDOMISE ORDER

I will visit much more often than last year, I will visit a little more often than last year, I will visit about the same as last year, I will visit a little less than last year, I will visit much less than last year, I don't tend to visit this type of attraction anyway

LIST OF ATTRACTIONS:
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

Q5. Thinking about your financial situation now, how does this compare with about a year ago? ONE CODE ONLY

I am much better off now, I am a little better off now, About the same, I am a little worse off now, I am much worse off now, Don't know

Q6. And how do you think that your financial situation will affect each of the following in the next few months (up to the end of October)? RANDOMISE ORDER

I will visit / use much more often than usual, I will visit / use a little more often than usual, it will make no difference, I will visit / use a little less often than usual, I will visit / use much less often than usual, I don't visit / use these anyway

LIST OF ATTRACTIONS:
Visitor attractions which are free to enter
Visitor attractions where there is an entrance fee
Membership / season passes to visitor attractions e.g. National Trust, English Heritage, Merlin Pass

Q7. Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (up to the end of October)? MULTICODING ALLOWED

It will make me more likely to renew my membership(s)/season pass(es), It will make me less likely to renew my membership(s)/season pass(es), It has / will encourage me to buy a new membership/season pass, It has / will make me less likely to buy a new membership/season pass, It will make no difference

DEMOGRAPHICS COLLECTED:

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

Questionnaire: 22-27 September 2022



ALVA PUBLIC SENTIMENT RESEARCH QUESTIONNAIRE – SEPTEMBER 2022

SAMPLE DEFINITION:

- UK adults aged 16 or over

INTRODUCTORY TEXT: The next few questions are about recent holidays you may have taken and any that you have planned for the next few months.

Q1a. Thinking back to the end of last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
- Short break (1-4 nights away) in early 2022 (Jan-Feb)
- Longer holiday (5 or more nights away) in early 2022 (Jan-Feb)
- Did not take an overseas holiday during any of these periods in

Q1b. And still thinking back to last year, which of these types of holidays did you take, in the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
- Short break (1-4 nights away) in early 2022 (Jan-Feb)
- Longer holiday (5 or more nights away) in early 2022 (Jan-Feb)
- Did not take a holiday in the UK during any of these periods

Q2a. Now thinking about this year, which of these types of overseas holidays have you either already taken, have booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Short break (1-4 nights away) in early 2023 (Jan-Feb)
- Longer holiday (5 or more nights away) in early 2023 (Jan-Feb)
- Have not taken nor intend to take an overseas holiday during any of these periods

Q2b. And still thinking about this year, which of these types of holidays have you either already taken, have booked or definitely intend to book in the UK? By holiday, we mean a leisure trip where you stay in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Short break (1-4 nights away) in early 2023 (Jan-Feb)
- Longer holiday (5 or more nights away) in early 2023 (Jan-Feb)
- Have not taken nor intend to take a holiday in the UK during any of these periods

The next few questions are about your feelings on the subject of visiting attractions in the UK. 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.

Q3. Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next few months (up to February next year). Please give as much detail as possible.

OPEN RESPONSE

Q4. How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to February next year) compared with the same period last year? RANDOMISE ORDER

I will visit much more often than last year, I will visit a little more often than last year, I will visit about the same as last year, I will visit a little less than last year, I will visit much less than last year, I don't tend to visit this type of attraction anyway

LIST OF ATTRACTIONS:

- 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

Q5. Thinking about your financial situation now, how does this compare with about a year ago? ONE CODE ONLY

I am much better off now, I am a little better off now, About the same, I am a little worse off now, I am much worse off now, Don't know

Q6. And how do you think that your financial situation will affect each of the following in the next few months (up to February next year)? RANDOMISE ORDER

I will visit / use much more often than usual, I will visit / use a little more often than usual, It will make no difference, I will visit / use a little less often than usual, I will visit / use much less often than usual, I don't visit / use these anyway

LIST OF ATTRACTIONS:

- Visitor attractions which are free to enter
- Visitor attractions where there is an entrance fee
- Membership / season passes to visitor attractions e.g. National Trust, English Heritage, Merlin Pass
- Indoor visitor attractions
- Outdoor visitor attractions

Q7. Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (up to February next year)? MULTICODING ALLOWED

It will make me more likely to renew my membership(s)/season pass(es), It will make me less likely to renew my membership(s)/season pass(es), It has / will encourage me to buy a new membership/season pass, It has / will make me less likely to buy a new membership/season pass, It will make no difference

Q8. The Government has recently announced financial support which caps the amount that households pay for their energy bills in the next two years? How do you think that this support will affect how often you visit attractions in the next few months (up to February next year)? MULTICODING ALLOWED

It will encourage me to visit attractions much more often, It will encourage me to visit attractions a little more often, It will make no difference to how often I visit attractions, It will make me less likely to visit attractions

DEMOGRAPHICS COLLECTED:

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

Questionnaire: 14-19 March 2023



ALVA PUBLIC SENTIMENT RESEARCH QUESTIONNAIRE – MARCH 2023

SAMPLE DEFINITION:

- UK adults aged 16 or over

INTRODUCTORY TEXT: The next few questions are about recent holidays you may have taken and any that you have planned for the next few months.

Q1a. Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
- Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
- Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
- Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021/22 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Did not take an overseas holiday during any of these periods

Q1b. And still thinking back to last year, which of these types of holidays did you take, in the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
- Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
- Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
- Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021/22 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Did not take an overseas holiday during any of these periods

Q2a. Now thinking about this year, which of these types of overseas holidays have you booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
- Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
- Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
- Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021/22 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Have not booked nor intend to book an overseas holiday during any of these periods

Q2b. And still thinking about this year, which of these types of holidays have you booked or definitely intend to book in the UK? By holiday, we mean a leisure trip where you stay in paid accommodation. MARK ALL THAT APPLY

- Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
- Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
- Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
- Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
- Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
- Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
- Short break (1-4 nights away) in Winter 2021/22 (Nov-Dec/Xmas/New Year)
- Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
- Have not booked nor intend to book a holiday in the UK during any of these periods

The next few questions are about your feelings on the subject of visiting attractions in the UK. 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.

Q3. Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next few months (during spring and summer this year). Please give as much detail as possible.
OPEN RESPONSE

Q4a. How often do you think that you will visit each of these types of attraction in the UK in the next few months (during spring and summer this year) compared with the same period last year? RANDOMISE ORDER

Q4b. And how often do you think that you will visit each of these types of venue in the UK in the next few months (during spring and summer this year) compared with the same period last year? RANDOMISE ORDER

I will visit much more often than last year, I will visit a little more often than last year, I will visit about the same as last year, I will visit a little less than last year, I will visit much less than last year, I don't tend to visit this type of attraction (venue for Q4b) anyway

LIST OF ATTRACTIONS FOR Q4A:

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

LIST OF VENUES FOR Q4B:

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

Q5. Thinking about your financial situation now, how does this compare with about a year ago? ONE CODE ONLY

I am much better off now, I am a little better off now, About the same, I am a little worse off now, I am much worse off now, Don't know

Q6. And how do you think that your financial situation will affect each of the following in the next few months (during spring and summer this year)? RANDOMISE ORDER

I will visit / use much more often than usual, I will visit / use a little more often than usual, It will make no difference, I will visit / use a little less often than usual, I will visit / use much less often than usual, I don't visit / use these anyway

LIST OF ATTRACTIONS:

- Visitor attractions which are free to enter
- Visitor attractions where there is an entrance fee
- Membership / season passes to visitor attractions e.g. National Trust, English Heritage, Merlin Pass

Q7. Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (during spring / summer this year)? MULTICODING ALLOWED

It will make me more likely to renew my membership(s)/season pass(es), It will make me less likely to renew my membership(s)/season pass(es), It has / will encourage me to buy a new membership/season pass, It has / will make me less likely to buy a new membership/season pass, It will make no difference