



ALVA Attractions Recovery Tracker

Wave 4

Fieldwork: 8-11 July 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

Wave 2: 13-18 May

Wave 3: 9-12 June

Wave 4: 8-11 July

668 survey responses

919 survey responses

1,065 survey responses

716 survey responses

Survey responses boosted...

Wales
(to 151)

Scot.
(to 104)

Survey responses boosted...

Wales
(to 100)

Scot.
(to 302)

Initial lockdown easing England
(13 May)

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

England indoor attns /
hospitality open (4 Jul)

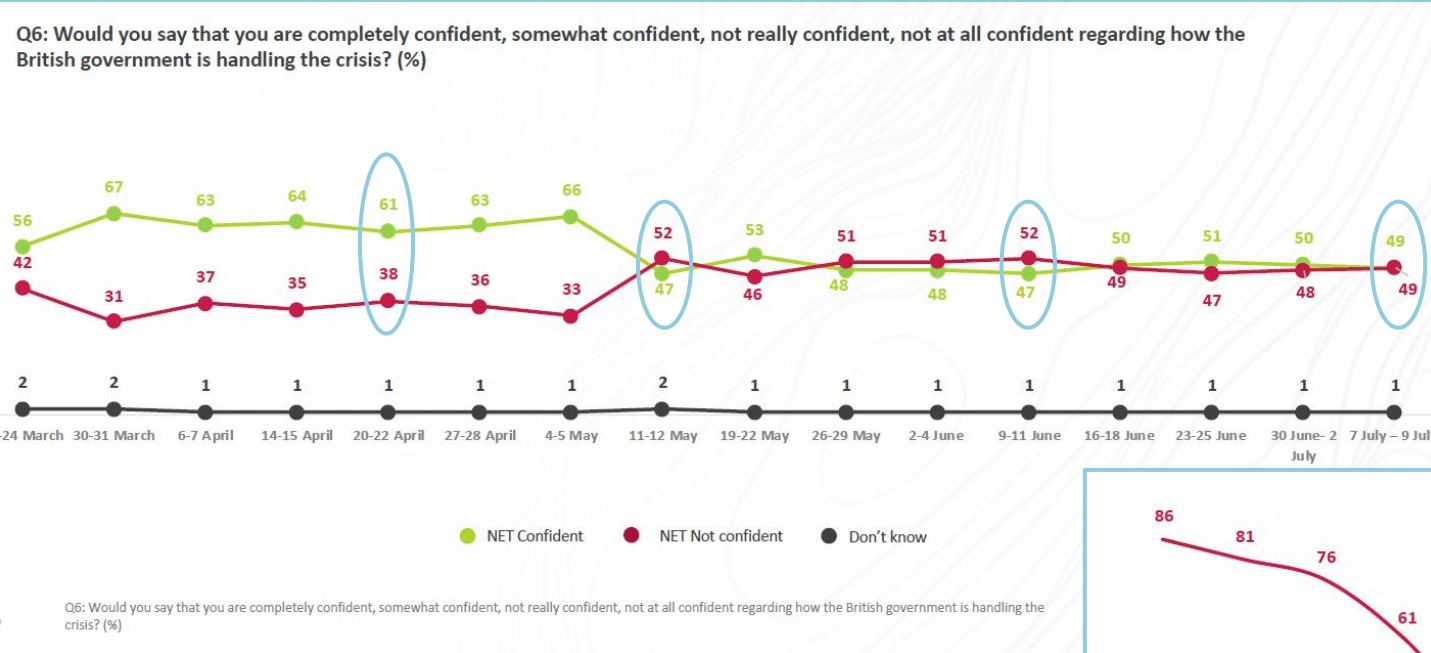


How is the public feeling about visiting attractions?

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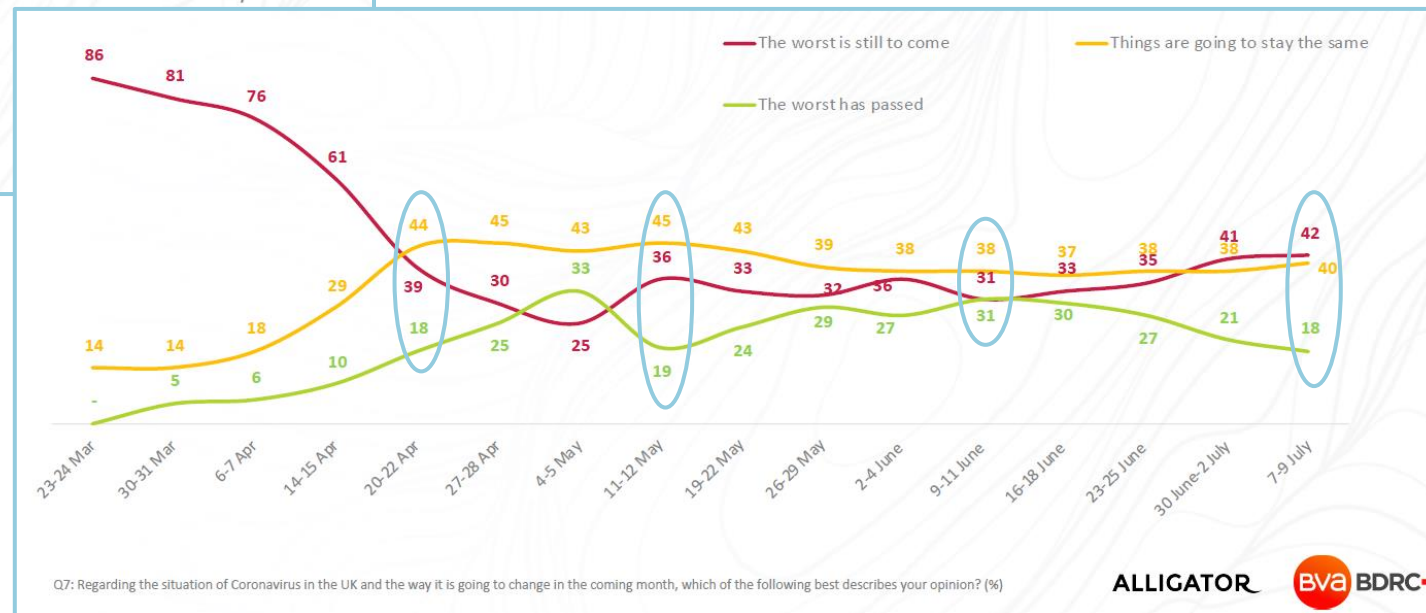
Since mid-June, national optimism that the worst of the Coronavirus situation in the UK has passed has decreased to its lowest level since mid-April



○ Timing of ALVA Attractions Recovery Tracker waves

Public fears growing around a second wave of the virus?

Concerns around lockdown easing too quickly?



When July's relaxation of lockdown rules was announced, 59% of the UK population felt that this was happening too quickly

The British public divides into five groups, according to their different views towards the timing of the original lockdown in March, and the relaxation of some measures in July...



Base: 1,078 Online British adults 16-75, 26-29 June 2020

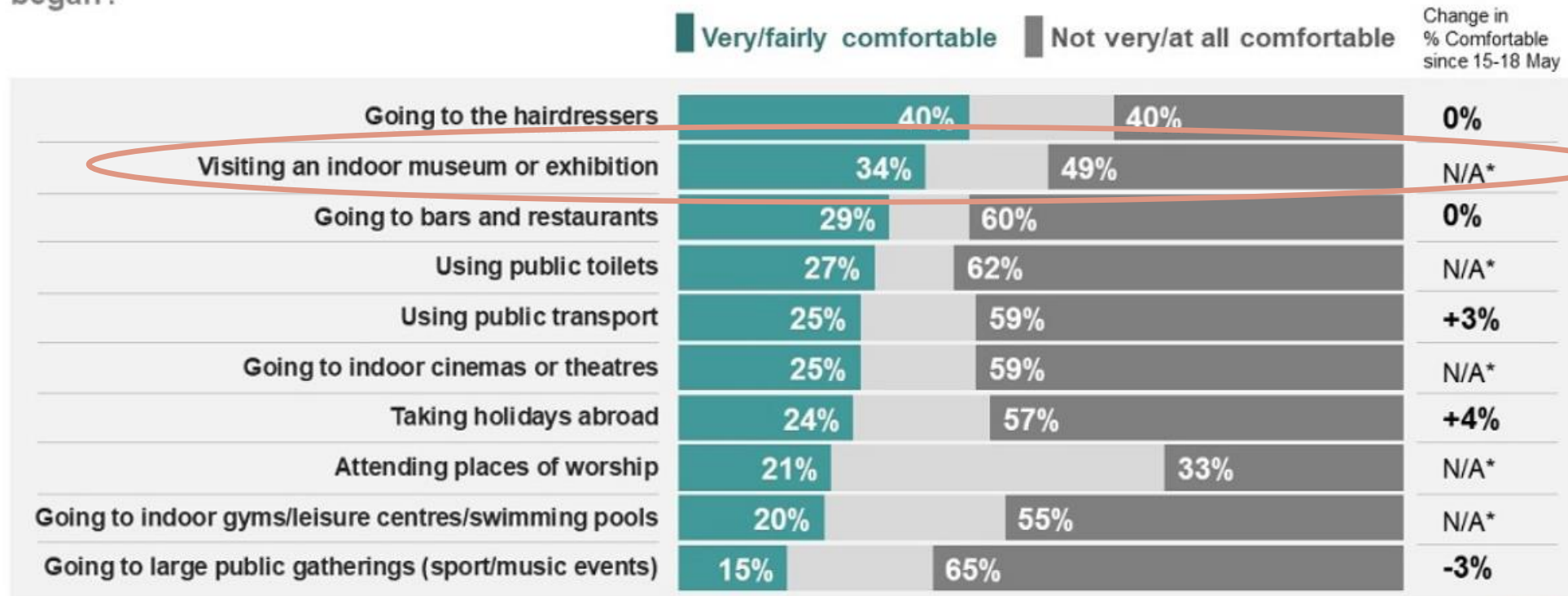
4 Ipsos | Coronavirus polling | June 2020

Ipsos MORI Ipsos

This is reflected by the large proportions of the population feeling uncomfortable with the discretionary activities yet to re-open at that point

Comfort with returning to “normality”

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



Base: 1,078 Online British adults aged 18-75, 26-29 June 2020. * This option was only asked for the first time this wave

© Ipsos MORI 2020

Against that challenging backdrop, it is encouraging to see growing confidence in visiting attractions, particularly those previously unable to open

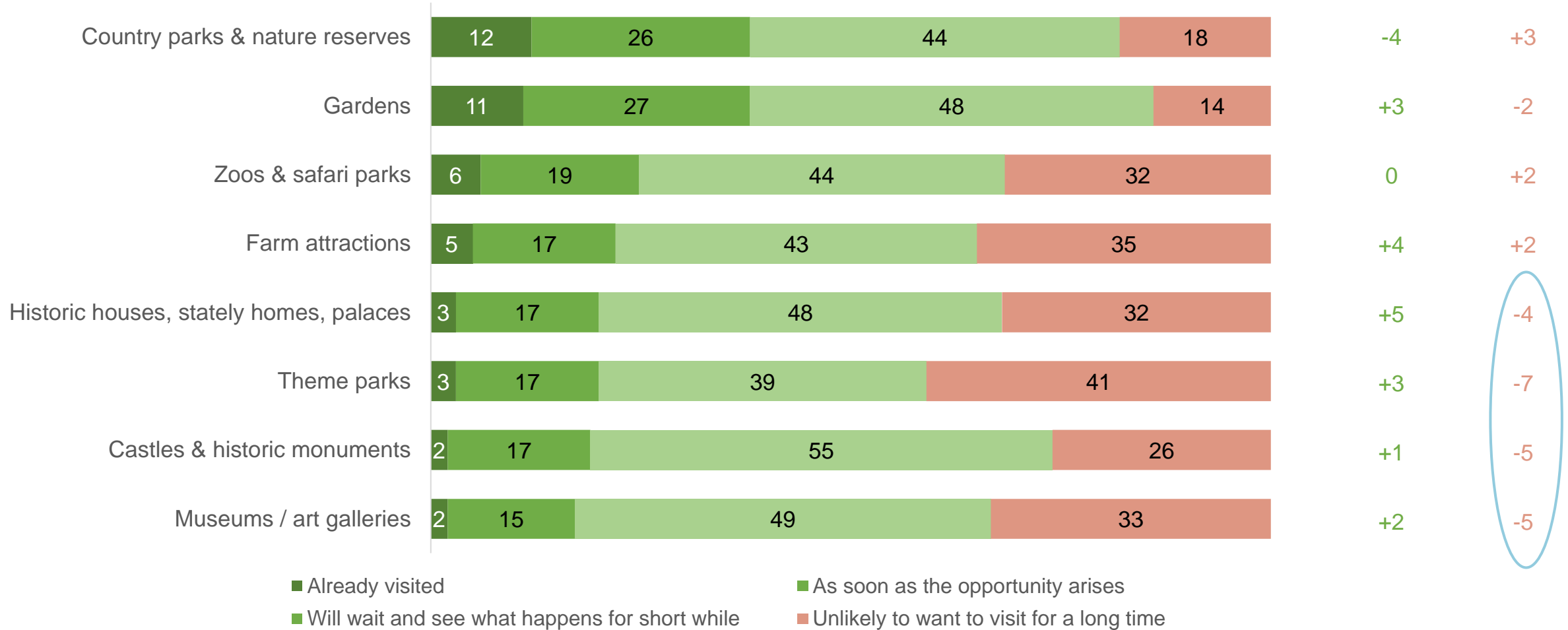
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Wave 4: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)

% change vs. WAVE 3

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?

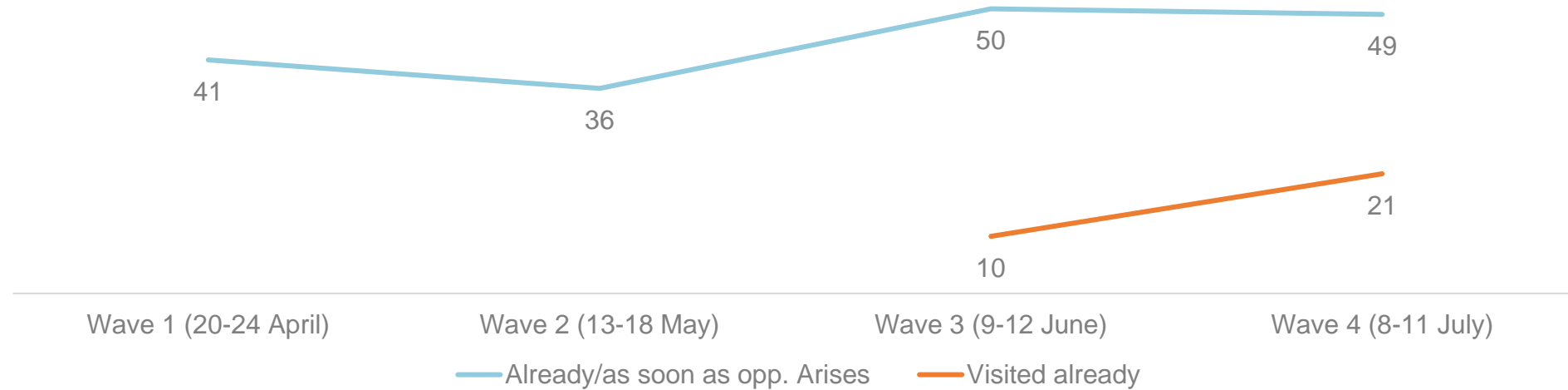
Bases: All who tend to visit this type of attraction – Wave 4: Museums/art galleries (641), Historic houses etc. (621), Castles & monuments (661), Zoos/safari parks (583), Gardens (644), Theme parks (492), Country parks & nature reserves (680), Farms (510)

However, half of the market remains stubbornly cautious about visiting. More positively, those claiming that they will visit as soon as the opportunity arose appear to be true to their words

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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



64% among
**most frequent
attraction visitors**
(8+ visits per year)

61% among
Members

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

Bases: All respondents Wave 4 (716)

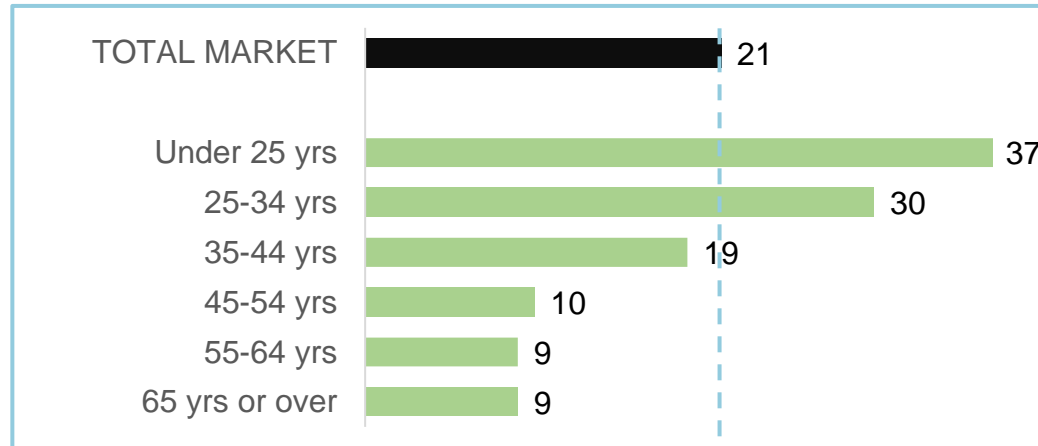
Early returning (mainly to outdoor attractions) is more likely among younger adults and frequent visitors. Evidence of lower likelihood of return among those not working

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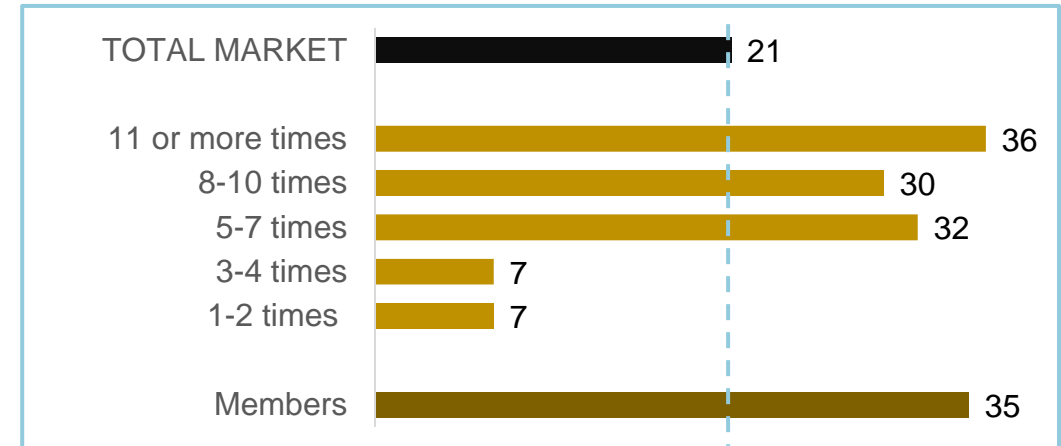
Attractions Recovery Tracker

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

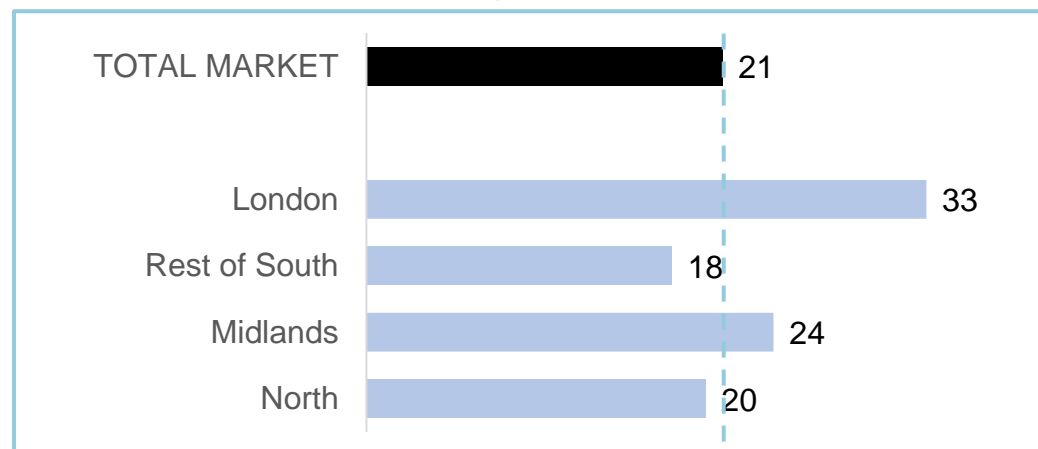
Age (%)



Attraction visiting frequency in 2019 (%)



Region (%)



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 4 (716)

Younger people are more likely to be the earliest returners, with those from older age groups less confident about a quick return – especially to indoor attractions

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Wave 4: HOW SOON do you think it will be before you visit each of these types of attraction after they re-open?
(% already visited or 'as soon as opportunity arises')

ALREADY / AS SOON AS OPPORTUNITY ARISES (%)	TOTAL	Aged under 35	Aged 35-54	Aged 55-64	Aged 65 or over
Country parks & nature reserves	38	42	38	34	32
Gardens	38	42	34	31	36
Zoos & safari parks	25	28	28	23	8
Farm attractions	22	28	23	14	9
Historic houses, stately homes, palaces	20	28	17	13	17
Theme parks	20	24	17	15	4
Castles & historic monuments	19	23	18	13	18
Museums / art galleries	17	22	16	13	15

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 4

Conversely, visit confidence among those with children is now higher than average for every attraction type and growing – particularly those only recently allowed to open

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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?
(% already visited or 'as soon as opportunity arises')

CHILDREN UNDER 16 AT HOME

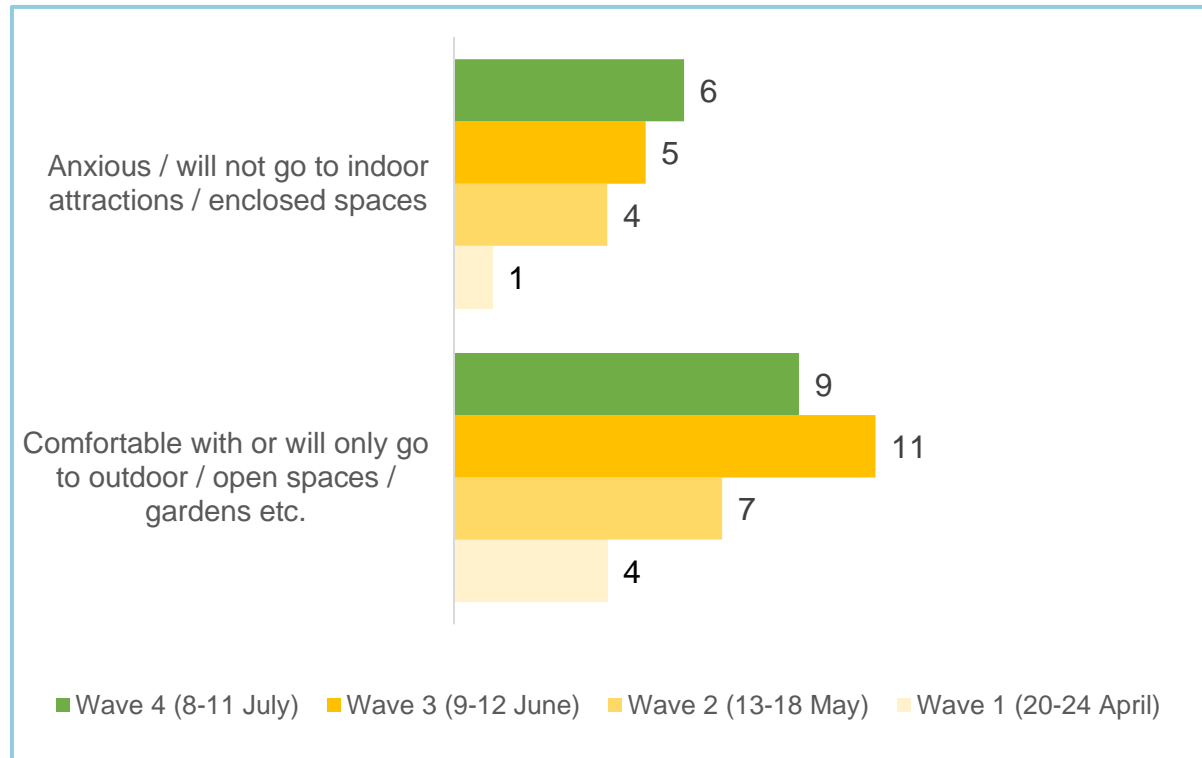
ALREADY / AS SOON AS OPPORTUNITY ARISES (%)	TOTAL	Children aged under 16	% change vs. Wave 3
Country parks & nature reserves	38	43	-1
Gardens	38	41	+3
Zoos & safari parks	25	30	-5
Farm attractions	22	31	+9
Historic houses, stately homes, palaces	20	25	+8
Theme parks	20	23	+3
Castles & historic monuments	19	23	+3
Museums / art galleries	17	23	+5

Anxiety around visiting indoor attractions persists, even following the announcement that these can now re-open in England

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



At the moment I would probably only visit outdoor attractions that allow for plenty of social distancing. However I hope they are all able to come through the other side of this as they provide for great days out and learning experiences. I hope to return to visiting these places soon, but I imagine me and my family will probably wait till more is known on COVID and we're **certain safety measures are in place before we start thinking of revisiting indoor places.**

To be honest I personally will not visit any indoor attractions yet. Although it may be safe, **it is just not enjoyable having to be careful what you touch and social distancing** etc. Attractions and days out should be fun and with the current restrictions I would rather not go

If the attraction is outside and quite spacious then I'd happily visit, I'd take my own food and drinks though. If it's an indoor attraction, I'm not so sure. My one big worry about visiting anywhere, is the **cleanliness of the toilet facilities.** But then I've always worried about that anyway, Coronavirus or no Coronavirus!

Happy to visit outdoor attractions, still a little stressed and anxious about **indoor venues with the enclosed spaces and 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?

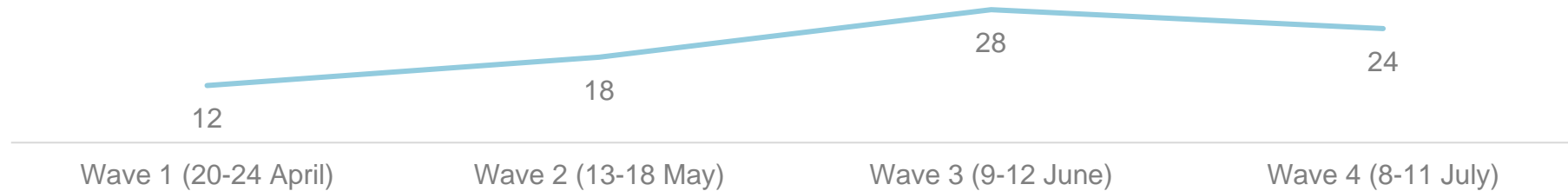
Base: All respondents, Wave 1 (668), Wave 2 (760), Wave 3 (750), Wave 4 (716)

Main barrier to visiting is still around social distancing (especially worries about fellow visitors or practical effectiveness), although this has softened slightly following the reduction from 2m to 1m+

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



12% mention specific concerns about fellow visitors or ability to enforce distancing (11% at Wave 3)

I feel like it's a good thing that things are returning to normal but as with the opening of pubs I feel like **people just can't be trusted yet** so for me personally I will still be self-isolating

Difficult to maintain social distancing and **enforcing families to stay away from others, when they want to have a good time** and freedom within a attraction that paid to go into.

I am concerned that people will **forget about the social distancing measures whist in a queue** and then get annoyed when someone speaks to them.

I want to be able to visit places I love and have memberships too, but I **worry about those people who haven't/won't follow the rules**

My feelings are that it is too soon to visit and feel totally safe. I would worry about people not obeying the social distancing rules, and **staff cannot be everywhere to make sure that this is carried out.**

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 (716)

Anxiety around using all forms of public transport to travel to attractions remains high

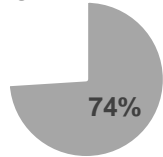
Fine about the attractions. It's the travelling by public transport which I find a barrier. OK if I can drive there



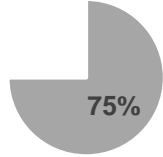
Wave 4: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)

% ever use for attns

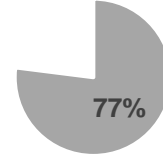
Underground / metro train



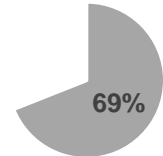
Public bus



Overground train



Taxi/minicab



% change vs. Wave 2 (WOULD USE)

Underground / metro train



-1

Public bus



-5

Overground train



-2

Taxi / minicab



-4

■ 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 4 – taxi/minicab (494), public bus (537), overground train (551), underground/metro train (530)

Among Londoners, there are still notable proportions of the market who would not use public transport to visit an attraction



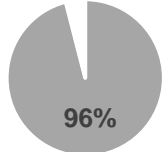
Wave 4: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)

BASE: All living in LONDON (n=99)

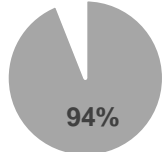
% change vs. Wave 3 (WOULD USE)

% ever use for attns

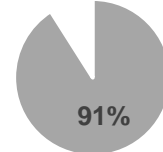
Underground / metro train



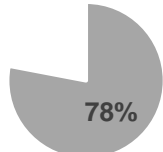
Public bus



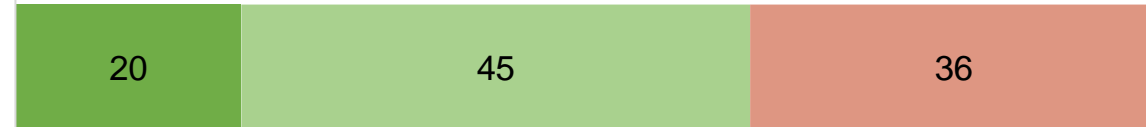
Overground train



Taxi/minicab



Underground / metro train



+7

Public bus



-11

Overground train



+2

Taxi / minicab



-3

■ 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 (78), public bus (94), overground train (96), underground/metro train (91)

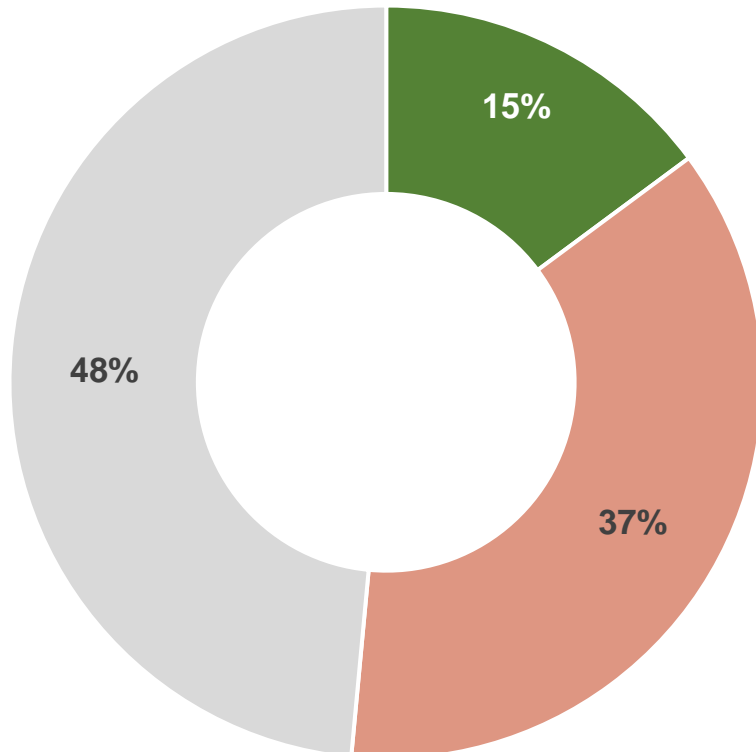
Attractions located in tourism hotspots, perhaps more than ever, need to keep local residents onside as they seek to attract summer visitors

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Wave 4: Whether those living in tourist areas will welcome visits this summer

- Live in tourist area and would like to see them visit this summer
- Live in tourist area but would rather they stay away
- Don't live in tourist area



Who will be welcoming?*

(Average = 29% in tourist areas)

Residents of:

West Midlands (47%), London (34%), Yorks/Hum (33%), North East (31%)

Who will be less welcoming?*

(Average = 71% in tourist areas)

Residents of:

East (82%), South West (77%), South East (76%), East Mids (76%), North West (76%), Scotland (75%), Wales (73%)

*beware small sample base sizes

Q: Which of these statements best applies to you?

Base: All respondents, Wave 4 (716)

How can we build trust and confidence in visiting?

What should we do?

What should we say?

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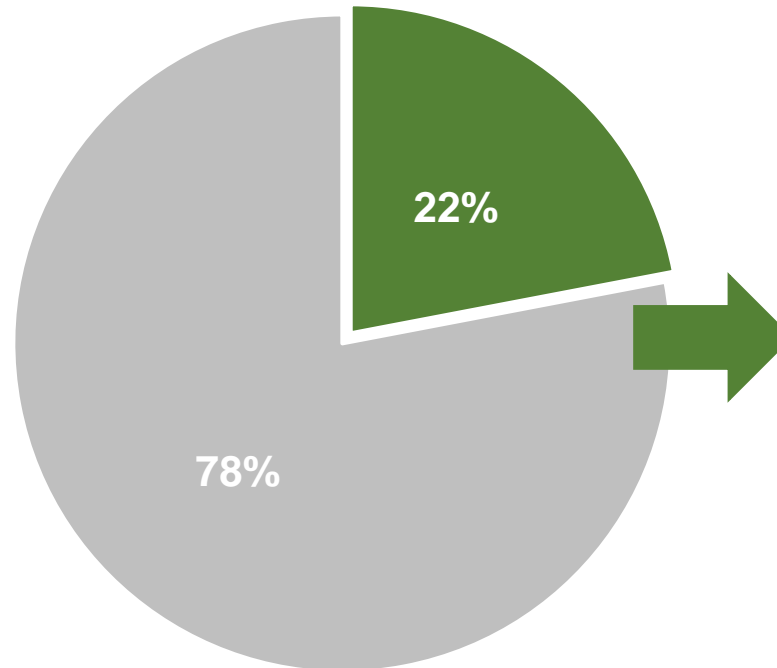
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The 'We're Good to Go' mark has built some strong awareness in the early weeks of its operation, including among those who are 'watching and waiting'

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Wave 4: Awareness of the 'We're Good to Go' mark (%)



■ Yes, seen this mark ■ No, not seen this mark

7% seen at an attraction

9% seen on website / promo. material of attn.

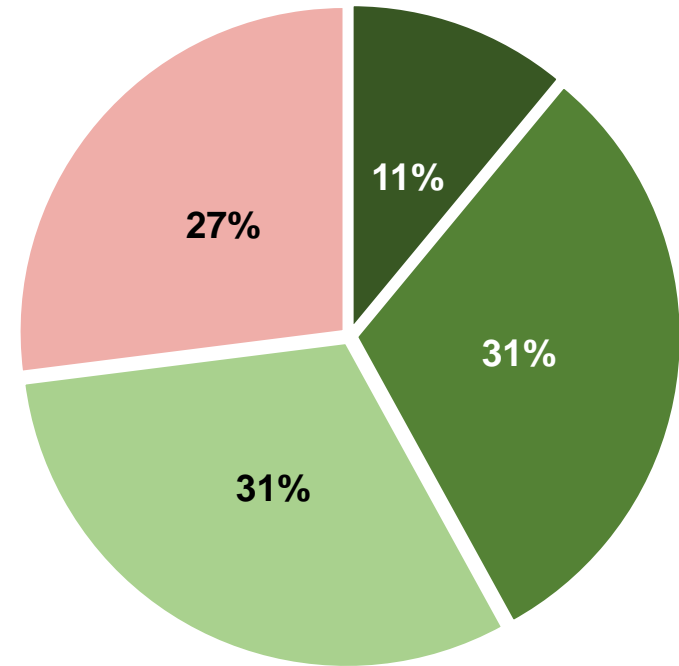
8% seen in the news or elsewhere

Awareness of 'We're Good to Go' is at similar levels to the market as a whole among the critical **'wait and see what happens for a short while'** segment

In these times of high caution, there is strong evidence that 'We're Good to Go' will have a major positive impact upon visit confidence

Wave 4: Impact of the 'We're Good to Go' mark (%)

- I would not visit an attraction unless I knew they had this mark
- This mark would give me a lot more confidence to visit an attraction
- This mark would give me a little more confidence to visit an attraction
- This mark would make no difference as to whether or not I visited an attraction



Among those who 'will wait and see what happens for a short while'

WOULD NOT VISIT WITHOUT IT / A LOT MORE CONFIDENCE (%)	
Gardens	40%
Zoos & safari parks	49%
Historic houses, stately homes, palaces	48%
Castles & historic monuments	45%
Museums / art galleries	44%

Q: If an attraction had this official UK mark, what impact would it have on your attraction-visiting behaviour?
Base: All respondents – Wave 4 (716)

There is clear and increasing demand for services to be available on re-opening. Significant proportions of the market would not visit an attraction which did not have their facilities open

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Wave 4: If these facilities were closed or not available when the attraction re-opened, what would you do? (%)

*% change vs. Wave 3
(WOULD NOT VISIT)*



■ 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

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 4– cafes/restaurants/ etc. (646), shops (567), toilets (591), playgrounds (246), audioguides/tours (238), guided tours (335), interactive exhibits (406)

Opening with as full an offer as possible is important – there are growing numbers of spontaneous comments which are beginning to question the value of the experience on re-opening

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Will the experience be as good as before? (4% spontaneous mentions at Wave 4)

Unsure as **most are only 1/2 open**, just the gardens, no cafes etc what about toilets?

Fairly anxious that even though risk may be low and there may be lots of contingencies in place, it will **somewhat diminish the experience by constant sanitising** etc

I am looking forward to visiting heritage railways again. However, I am **concerned that the quality of the experience may be poor** e.g. not hot food which one can sit down and eat. There may also be queues

I fear that visits will not be as relaxed, concentrating on ensuring social distancing and hygiene will take some of my focus away from leisurely walking around the area and studying the exhibits. Staff monitoring and control of entry and numbers will make it too regimented. **I want to return but I want it to be a leisurely relaxed experience as in the past.**

I don't mind visiting attractions, however I want the **full experience not a mediocre one** so am hesitant to go

I hope that they have good safety and social distancing (or other relevant) measures in place. **I worry that certain features/places might be closed** due to not being able to socially distance and it might not be worth going.

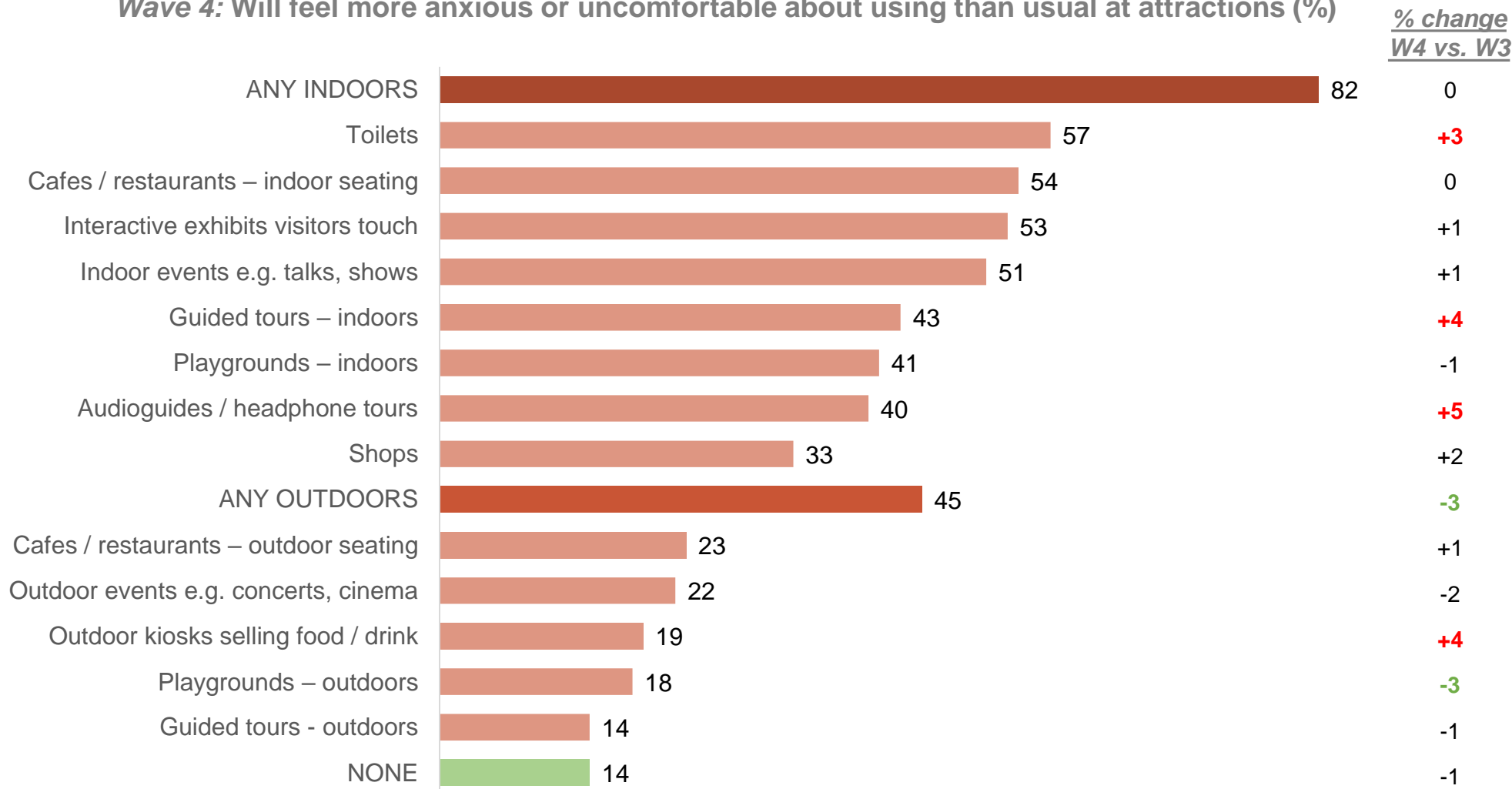
Will be happy when the food and drink parts are open.

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

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Wave 4: Will feel more anxious or uncomfortable about using than usual at attractions (%)



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

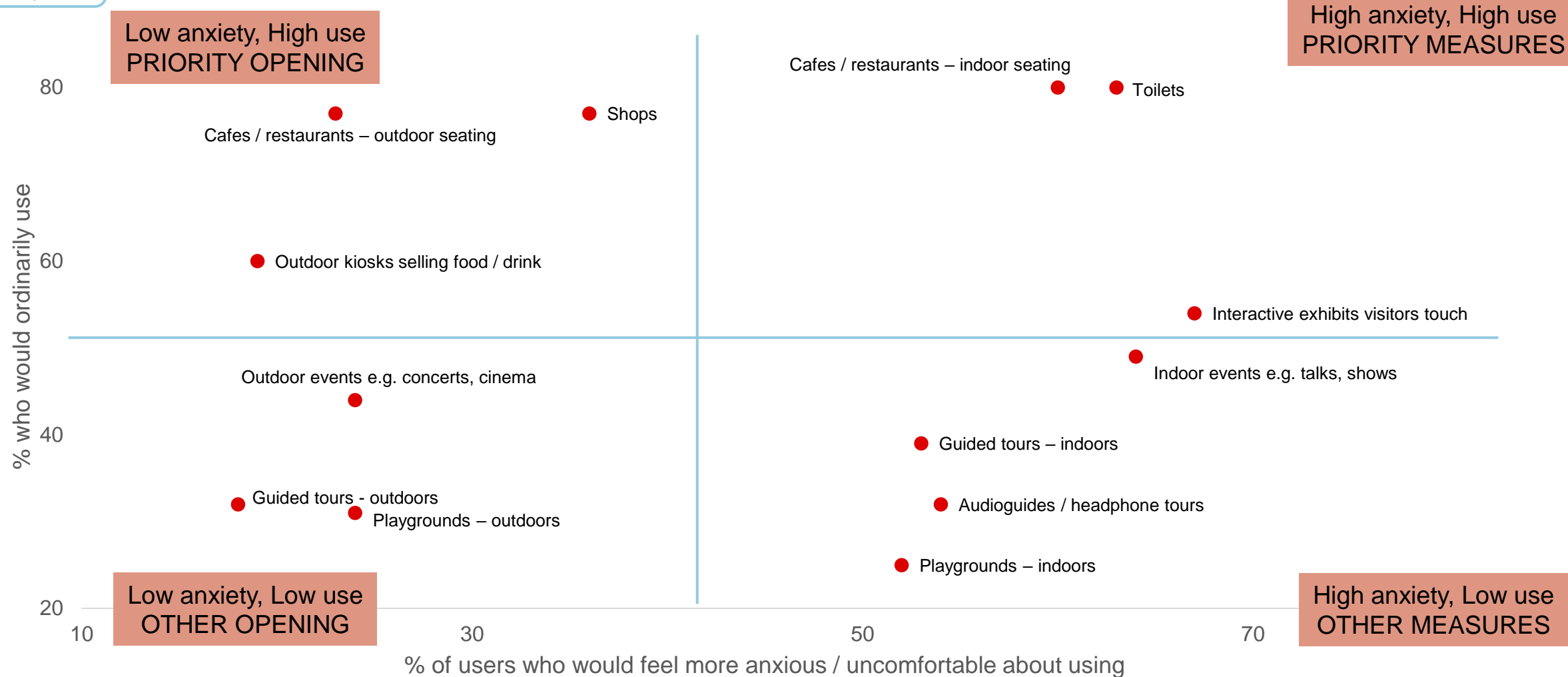
Base: All respondents (Wave 2: 760, Wave 3: 750, Wave 4: 716)

As indoor attractions re-open, it is clear that there will be high anxiety for many around facility use – cafes, toilets and interactives need to be priorities in pre-visit comm and on-site actions

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Wave 4: Level of anxiety among those who would ordinarily use

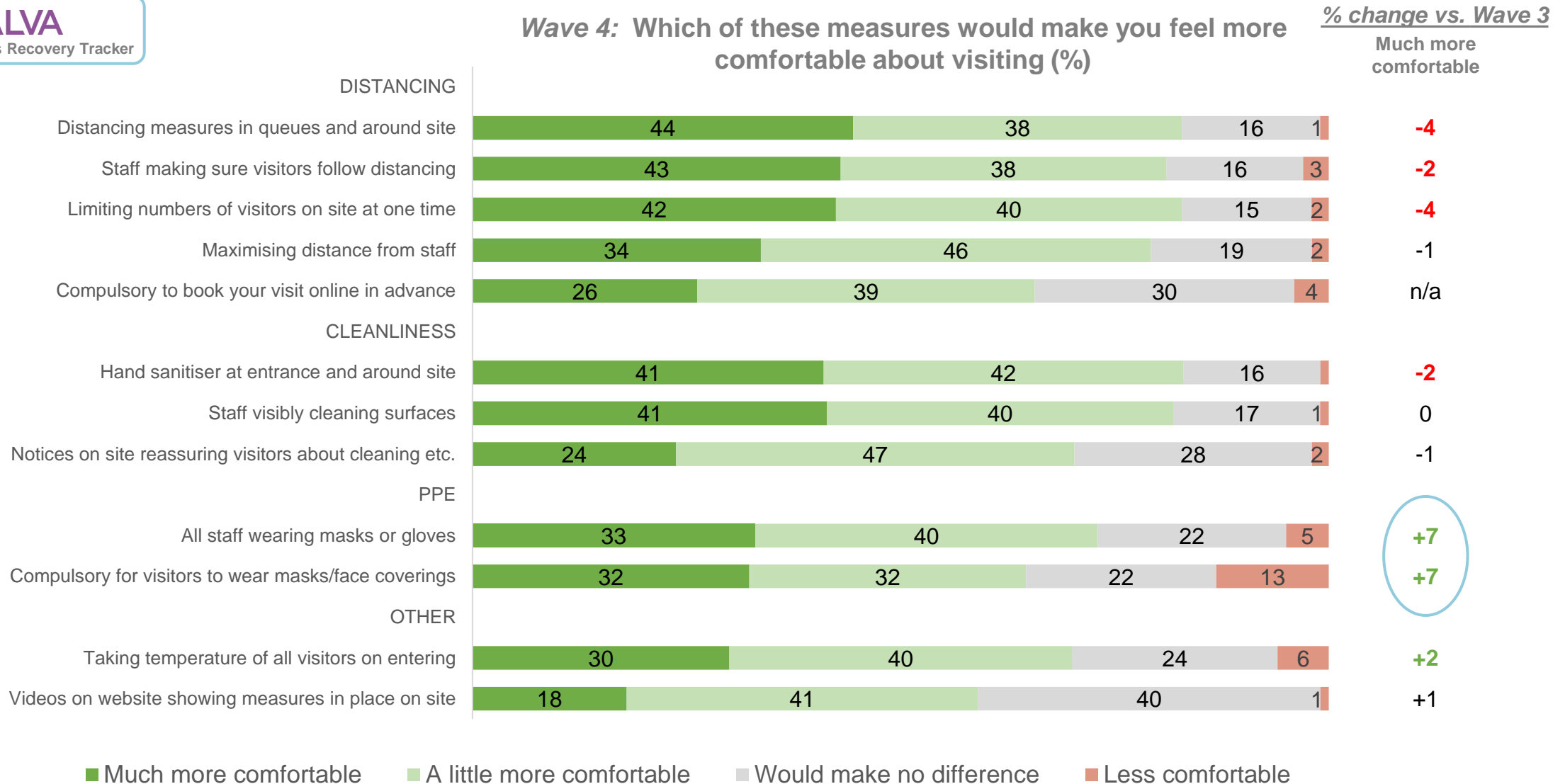


Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open?
 Base: All respondents, Wave 4 (716)

There has been a notable increase in the numbers feeling that the compulsory wearing of face masks/coverings for visitors would make them feel more comfortable about a visit. Slight softening of the importance of distancing, following the reduction from 2m to 1m+

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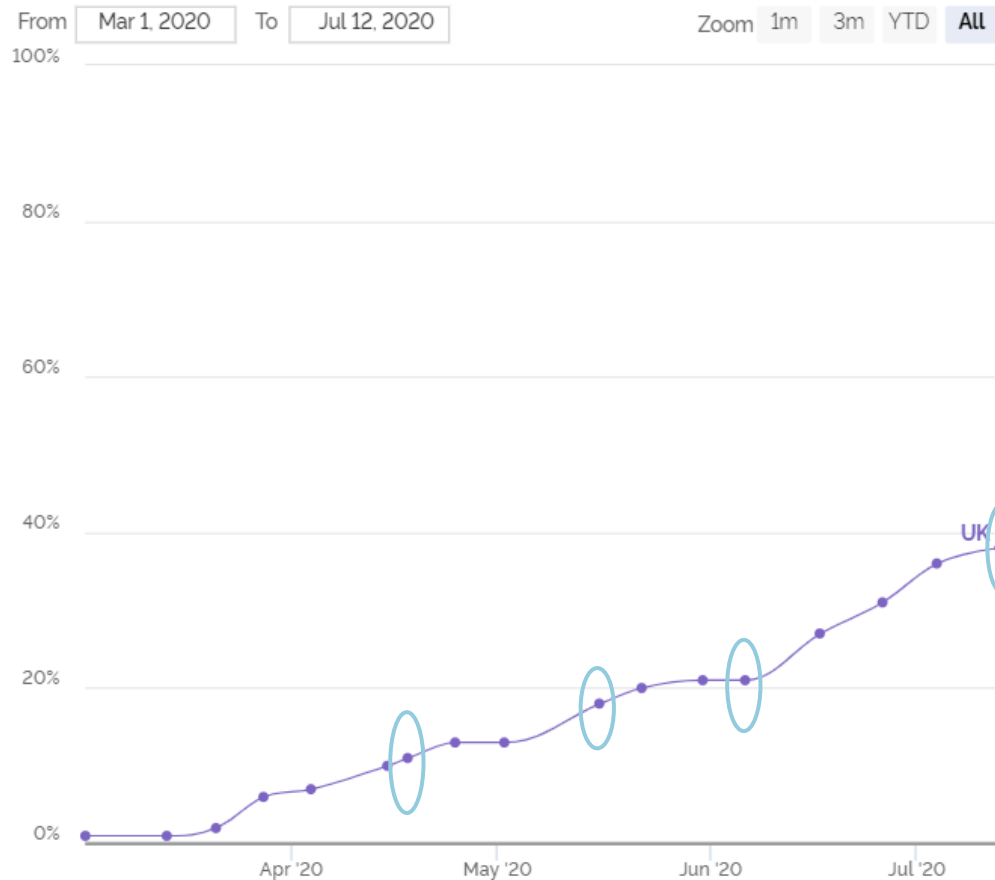
Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?

Bases: All respondents – Wave 4 (716)

Wearing of face masks in the UK has increased significantly in recent weeks. 5% now refer to face masks when asked for their spontaneous feelings on visiting attractions (3% at Wave 3)

YouGov COVID-19 behaviour changes tracker: Wearing a face mask when in public places

% of people in each country who say they are: Wearing a face mask when in public places.



○ Timing of ALVA Attractions Recovery Tracker waves

Social distancing and mask usage must be enforced or I will feel incredibly unsafe

I hope to revisit the London History museum and the Science Museum. I'm worried people won't be wearing masks and I'm worried I might catch coronavirus

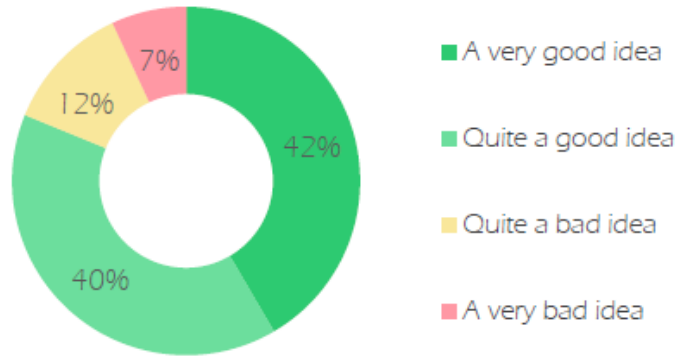
I'm apprehensive because when out and about most people do not wear masks which is concerning. I think it should be mandatory

Will not be visiting attractions until I see number of Covid 19 cases much lower. I might consider sooner if mask wearing was compulsory.

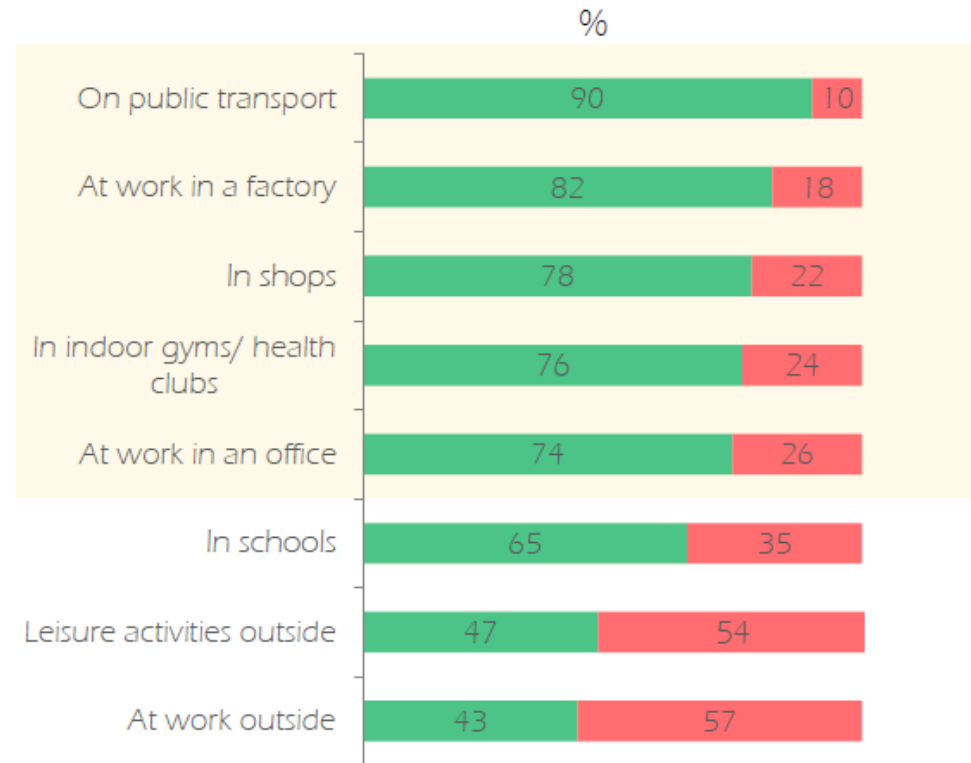
Will not be visiting. A lot of people don't want to wear masks and other protection, so I don't think it's safe.

Indeed, research from *Aurora MR* indicates that there now appears to be widespread public support for the wearing of face masks in enclosed public spaces

Four in five UK adults think that a requirement to wear a face mask in enclosed public spaces is a good idea



■ Better if face mask required
■ Better if face mask not required



Q1. As the lockdown begins to end, what would your reaction be if it now became a requirement across the whole of the UK to wear a face mask or a face covering in enclosed public spaces, such as on public transport and in shops, cafes, pubs and restaurants?

Q2. In the current times, in which, if any, of these locations or situations do you think it would be best if people were required to wear a face mask or face covering?

Base: All UK Adults – Nationally Representative by age, gender, region and socio-economic grade (1,011)

Fieldwork dates: Wednesday 8th – Sunday 12th July 2020

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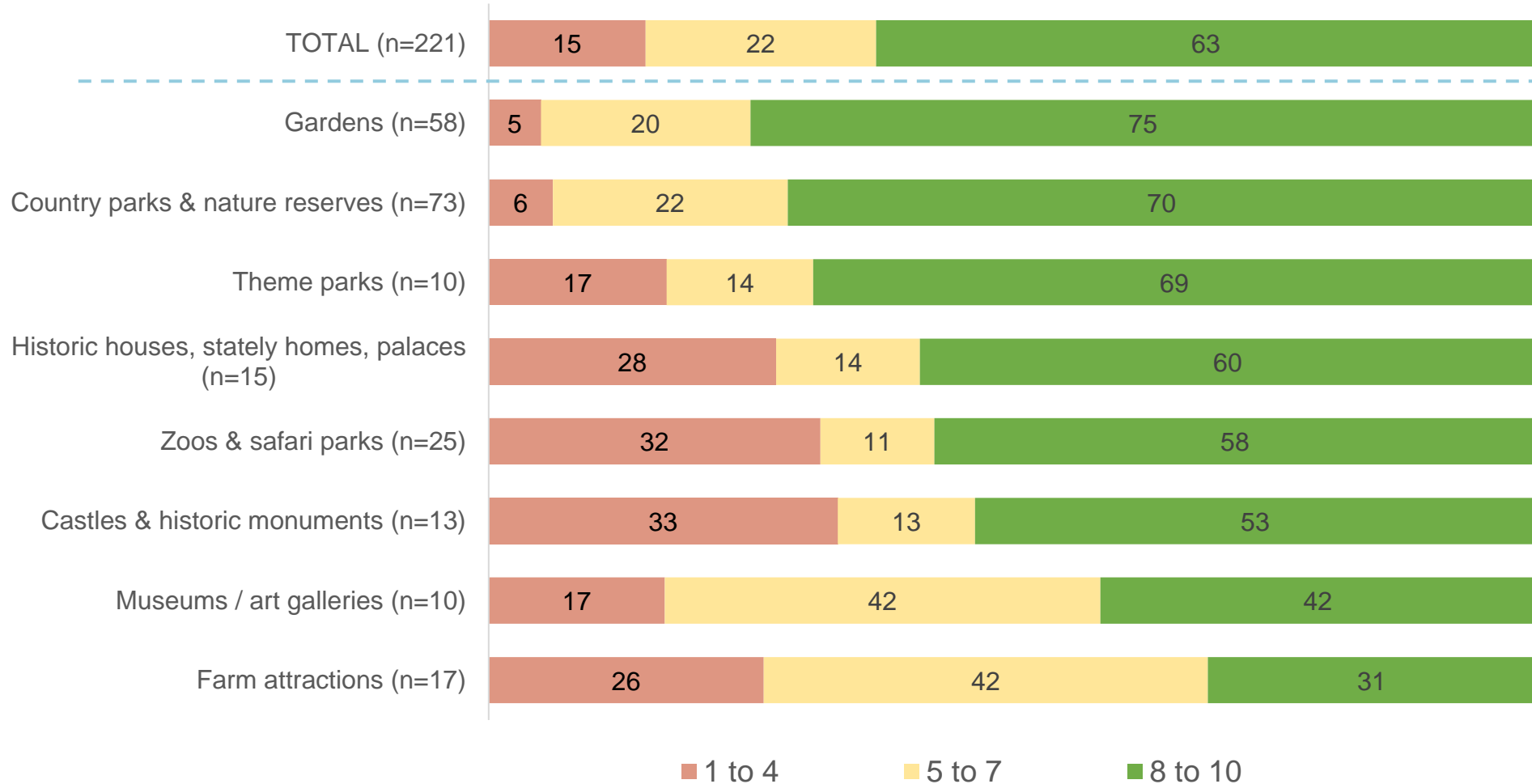
Among those visiting attractions since re-opening, reaction to safety measures has been fairly good, although nervousness among visitors to attractions which were only allowed to open recently is apparent

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Wave 4: Rating of Coronavirus safety measures in place around the site among visitors (out of 10)

(N.B. beware small sample base sizes)





Key take-outs

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Key take-outs / 1 *(Wave 4: 8-11 July)*

Against a challenging backdrop of decreasing general optimism around Covid-19 in the UK, there has been some growth in confidence in attraction visiting – particularly for categories previously unable to open. News around the 4 July permission to re-open in England will undoubtedly have helped

Those previously claiming that they would revisit *‘as soon as the opportunity arises’* appear to be true to their word, with 21% of the market (around 8.5m adults) claiming to have already visited since re-opening

Among those visiting attractions since re-opening, reaction to safety measures has been fairly good, although nervousness among visitors to attractions which were only allowed to open recently is apparent

However, around half the attractions-visiting market remains stubbornly cautious about visiting. Main visit barrier is lack of confidence in attractions’ ability to control distancing, led by concerns over fellow visitors compliance. Can we demonstrate and communicate that these are working well in our attractions – especially those indoors, where concerns are highest?

Are there some social inclusion issues beginning to emerge? Early returning is much less likely among the older generation and among those who are not working

Key take-outs / 2 (Wave 4: 8-11 July)

There is strong evidence that the 'We're Good to Go' mark will have a much-needed, major positive impact upon visit confidence and almost a quarter of the market already claim to have seen this mark

There is clear and increasing demand for a full visit experience to be available on re-opening, with significant proportions not visiting if services and facilities were to be closed. Opening with mitigation measures is better than keeping closed

However, as indoor attractions re-open, high anxiety in the market remains around these indoor facilities – especially toilets, catering outlets, interactive visit elements and events. Demonstrating and communicating safety measures pre-visit will be even more critical than for outdoor attractions

Two-thirds of the market would feel more comfortable about visiting an attraction if masks / face coverings were compulsory, a significant growth since June and reflecting wider public opinion and growth in use in recent weeks. Is now the time to take the socially responsible line and embrace their use in attractions?

Attractions located in tourism hotspots, perhaps more than ever, need to keep local residents onside as they seek to attract summer visitors – 71% of residents in these areas would rather visitors stay away

Update on *ALVA Visitor Recovery Benchmarking* initiative

ALVA Visitor Recovery Benchmarking

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Launched on 4 July: 35 attractions committed plus conversations with many more, UK-wide – already c.1,000 survey responses among those who have opened

A reminder:

- 🕒 Visitor tracking survey to understand how your visitors are feeling about new safety measures, 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 and analysis tool on a shared basis - benchmarks for sectors and individual attractions
- 🕒 Results updated weekly
- 🕒 Low cost - £750 per attraction, with large discounts for multiple attractions

Running until December 2020

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 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
- 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

Questionnaire: Wave 4 (8-11 July)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE

SAMPLE DEFINITION:

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

Q1. 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
9-10 times
5-7 times
3-4 times
Once or twice
Not at all

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

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they re-open to the public following the 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 after 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 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

FOR EACH ALREADY VISITED AT Q2:

Q3. Thinking about your visit(s) to (ATTRACTION TYPE AT Q2) in general since re-opening, on a scale of 1 to 10, where 10 is Excellent and 1 is Very Poor, how would you rate the Coronavirus safety measures in place around the site(s)?
(1-2 Very Poor, 3-4 Poor, 5-6 Just OK, 7-8 Good, 9-10 Excellent, DK/CR, Not applicable)

Q4. Thinking about visiting attractions generally after they re-open, which of these measures would make / are making you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

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

Q5a. At visitor attractions which of these, if any, would / do you feel more anxious or uncomfortable about using than usual after 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]

Q6. 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

Q7a. "We're Good To Go" is the official UK mark to signal that a tourism and hospitality business has worked hard to follow Government and Industry COVID-19 guidelines and has a process in place to maintain cleanliness and aid social distancing. Have you seen this official UK mark anywhere?
MARK ALL THAT APPLY

Yes, seen this mark at a visitor attraction
Yes, seen this mark on the website or promotional material of a visitor attraction
Yes, seen this mark in the news or elsewhere
No, not seen this mark

Q7b. If an attraction had this official UK mark, what impact would it have on your attraction-visiting behaviour? ONE CODE ONLY

I would not visit an attraction unless I knew they had this mark
This mark would give me a lot more confidence to visit an attraction, but it would not be essential
This mark would give me a little more confidence to visit an attraction, but it would not be essential
This mark would make no difference as to whether or not I visited an attraction

Q8. Which of these statements best applies to you? ONE CODE ONLY

I live in an area which attracts a lot of tourists and I would like to see them visit this summer
I live in an area which attracts a lot of tourists, but I would rather they stay away for now
I do not live in an area which attracts a lot of tourists

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

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

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

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

DEMOGRAPHICS COLLECTED:

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