ALVA Attractions Recovery Tracker

Wave 7

Fieldwork: 3-9 March 2021

ALVA

decision house

The challenge for 2021

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

- …….that we are still safe places to visit
- …….that we are still able to deliver the same (or better) full, rich and engaging visit experiences

What differences are we likely to see when re-opening this time around?

- What implications do these have for how we physically present ourselves?
- What implications do these have for how we communicate with audiences and visitors?
- What implications do these have for budget planning?

How have we been generating insights?

Periodic waves of online research among representative samples of the attractions-visiting public:

"UK adults who visited at least one attraction in the UK in 2019"

	2020 Waves	Sample	Boosts	Prompted by…..
1	20-24 April	668 from UK	-	First lockdown
2	13-18 May	919 from UK	Wales	Initial lockdown easing England (13 May)
3	9-12 June	1,065 from UK	Scotland	England gardens open (1 Jun), zoos / shops (15 Jun)
4	8-11 July	716 from UK	-	England indoor attns / hospitality open (4 Jul)
5	26 Aug-2 Sep	720 (Lon & Scot only)	-	End of school holidays / Eat Out to Help Out

Wave 6: *26-31 January*

869 survey responses

London c.200

Scot. c.100

Wave 7: *3-9 March*

1,090 survey responses

London c.200

Scot. c.300

Wave 8 and onwards: *??*

Anticipate material shift in sentiment

Lockdown easing announcement (22 Feb)

How is the public feeling about visiting attractions?

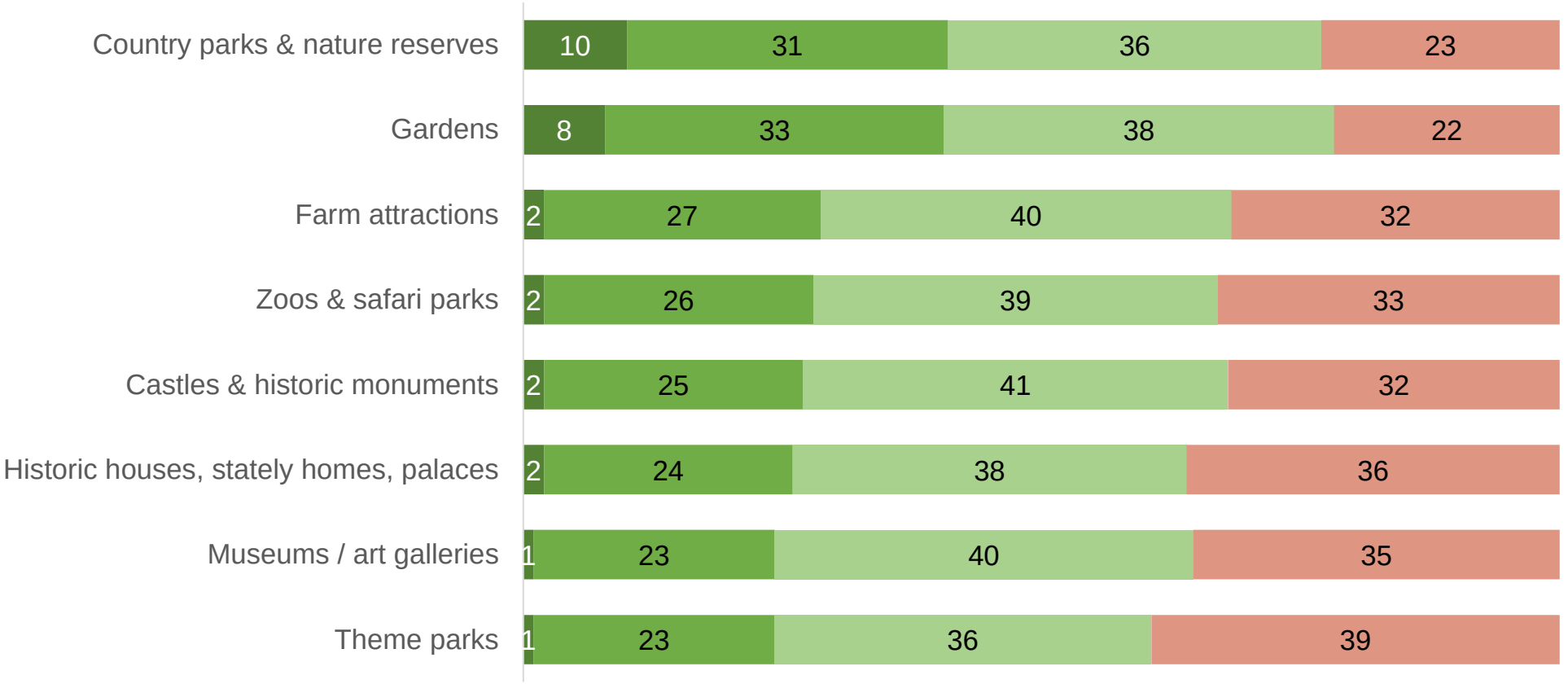
ALVA

decision house

Since end January, there has been a notable positive shift in confidence around visiting attractions when they re-open. In 2020, the first lockdown easing announcement saw a drop in confidence

ALVA
Attractions Recovery Tracker

Wave 7: Assuming not had first vaccine dose HOW SOON before you visit each of these types of attraction* (%)



	% change vs. W6 (end Jan '21)	
	Already / as soon opp.	Unlikely for long time
Country parks & nature reserves	+5	-1
Gardens	+5	-2
Farm attractions	+11	-5
Zoos & safari parks	+1	-2
Castles & historic monuments	+4	-3
Historic houses, stately homes, palaces	+4	-3
Museums / art galleries	+3	-5
Theme parks	+3	-7

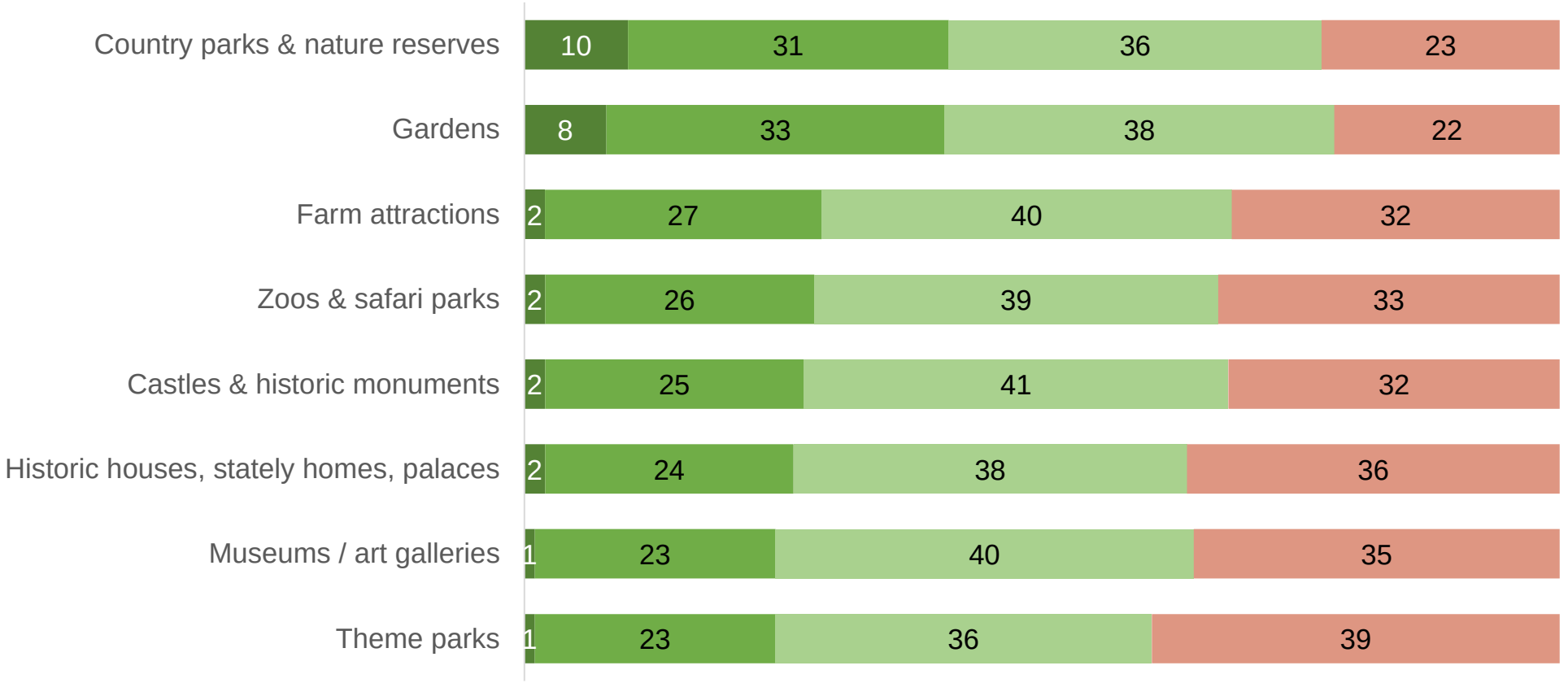
**includes those who have already received first vaccine dose (33% at Wave 7)*

Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)
Bases: All who tend to visit this type of attraction – Wave 7

Confidence in visiting ‘as soon as the opportunity arises’ is even higher than at the point when indoor attractions re-opened in 2020

ALVA
Attractions Recovery Tracker

Wave 7: Assuming not had first vaccine dose HOW SOON before you visit each of these types of attraction* (%)



	% change vs. W4 (early Jul ‘20)	
	Already / as soon opp.	Unlikely for long time
Country parks & nature reserves	+3	+3
Gardens	+3	+8
Farm attractions	+7	-3
Zoos & safari parks	+3	+1
Castles & historic monuments	+8	+6
Historic houses, stately homes, palaces	+6	+4
Museums / art galleries	+7	+2
Theme parks	+4	-2

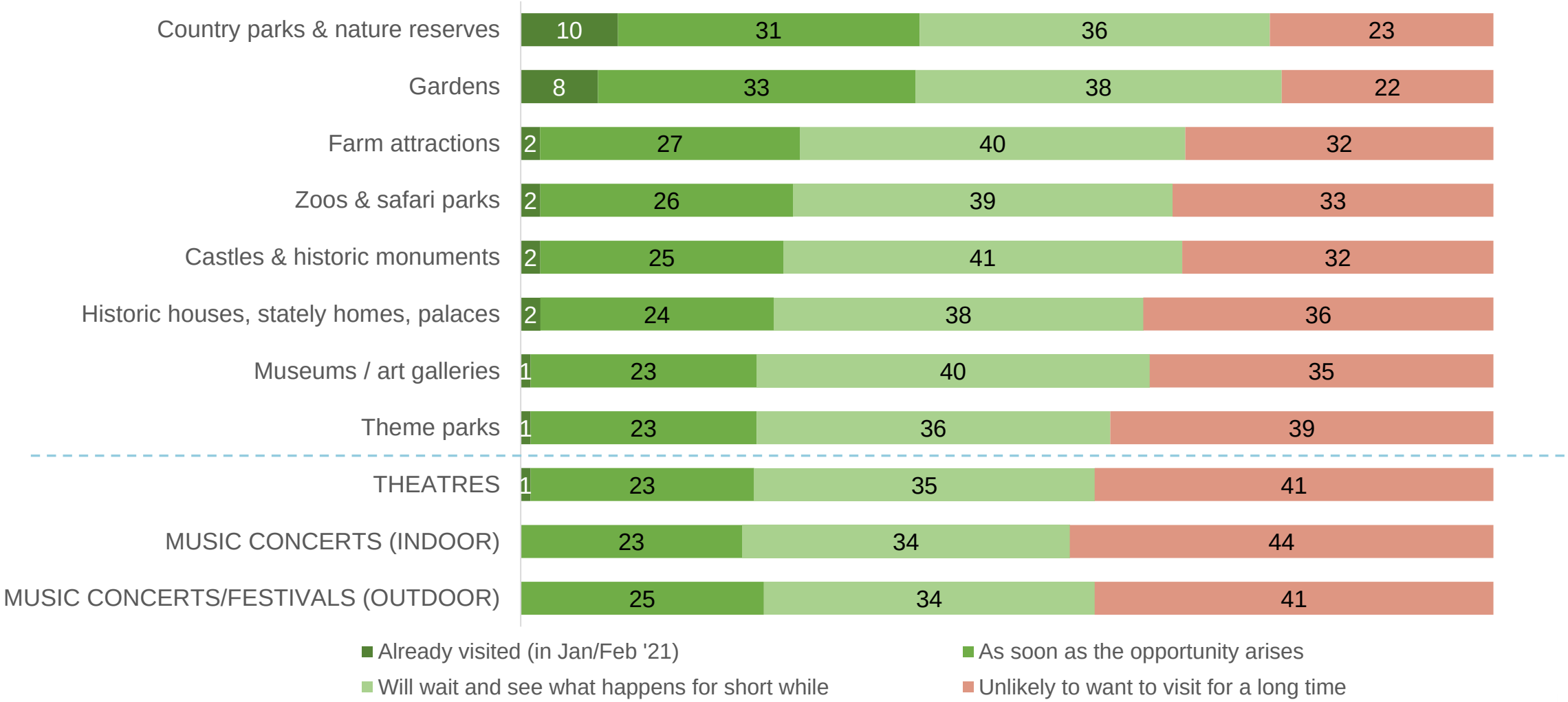
**includes those who have already received first vaccine dose (33% at Wave 7)*

Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)
Bases: All who tend to visit this type of attraction – Wave 7

Confidence in visiting theatre and concert venues is at slightly lower levels than most attractions – even outdoors. Unlike attractions, they were less able to build visit confidence by opening in 2020

ALVA
Attractions Recovery Tracker

Wave 7: Assuming not had first vaccine dose HOW SOON before you visit each of these types of attraction* (%)



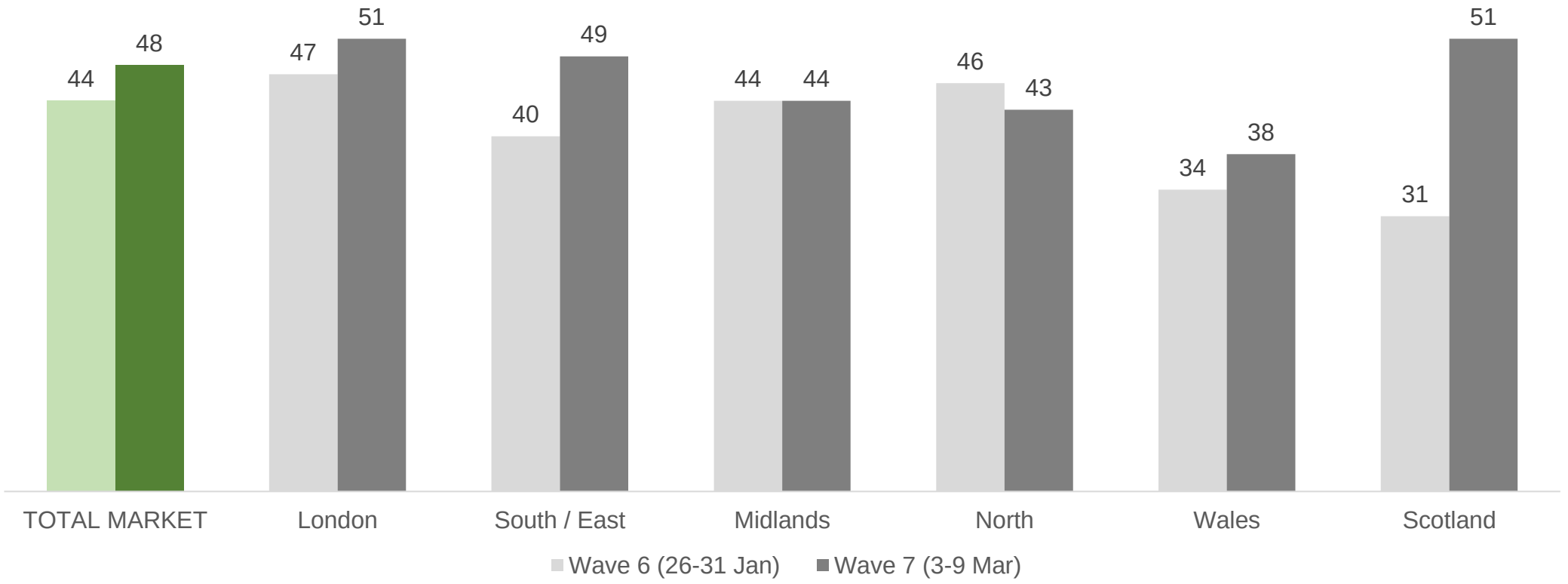
*includes those who have already received first vaccine dose (33% at Wave 7)

Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)
Bases: All who tend to visit this type of attraction – Wave 7

This increase in confidence has been driven by those living in the south of England and Scotland. The Midlands and North have yet to see the same increases

ALVA
Attractions Recovery Tracker

Any *'I have already visited in Jan/Feb this year' or will 'as soon as opportunity arises'* (%)*



**includes those who have already received first vaccine dose (33% at Wave 7)*

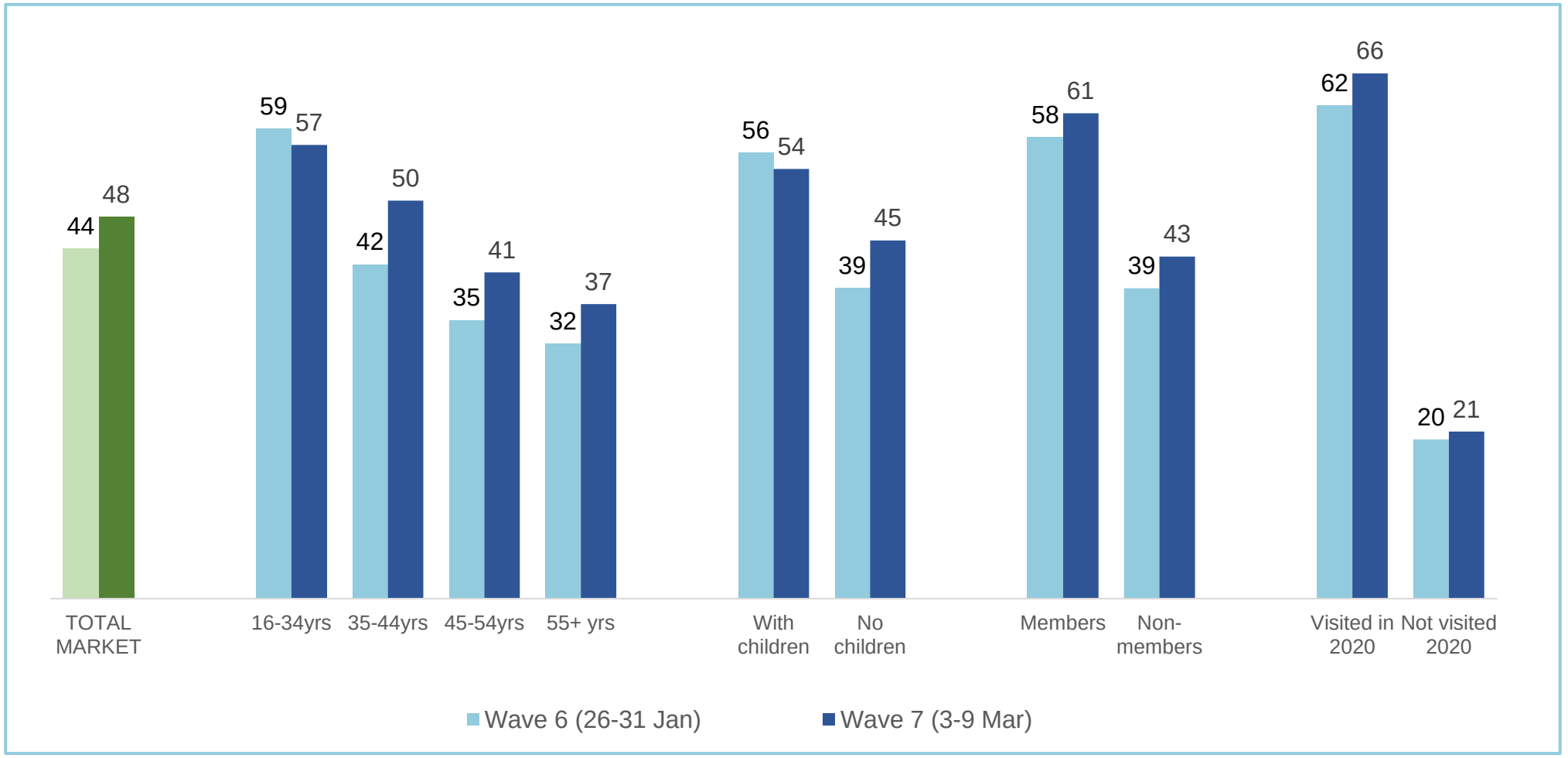
Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)

Base: All respondents (Wave 6: 869, Wave 7: 1,090)

The increase in confidence over the past month has been driven by those who have been lower on confidence throughout the pandemic – older people and non-families

ALVA
Attractions Recovery Tracker

Any *'I have already visited in Jan/Feb this year' or will 'as soon as opportunity arises'* (%)*



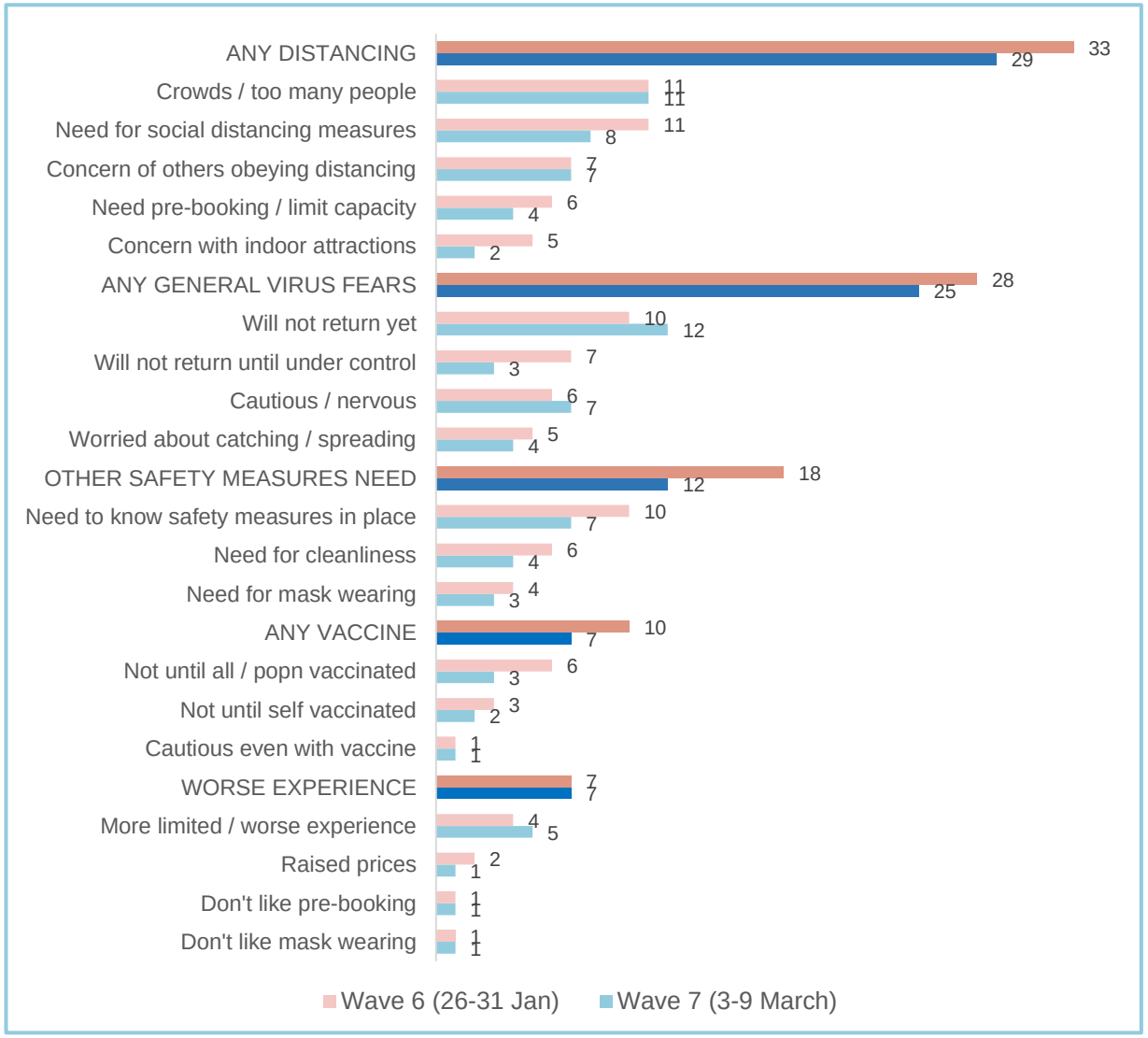
**includes those who have already received first vaccine dose (33% at Wave 7)*

Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)

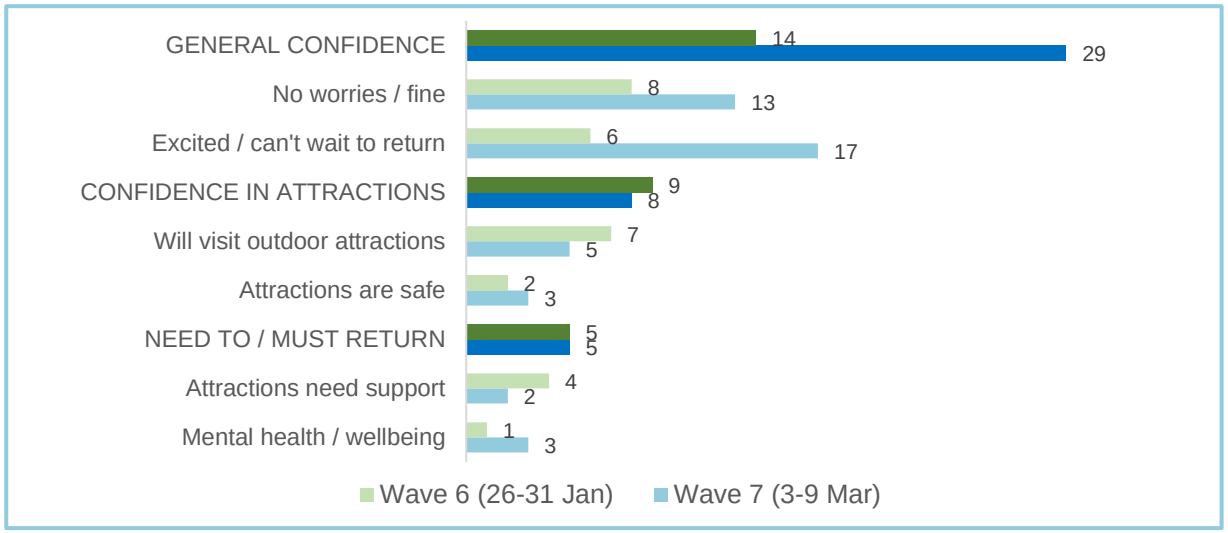
Base: All respondents (Wave 6: 869, Wave 7: 1,090)

There has been a marked easing of expressed anxiety around returning to attractions, with the proportions feeling fine or even excited about returning doubling since end January

66% expressed fear or concerns about visiting (73% at Wave 6 - end Jan)



40% expressed confidence / desire to return (26% at Wave 6 – end Jan)



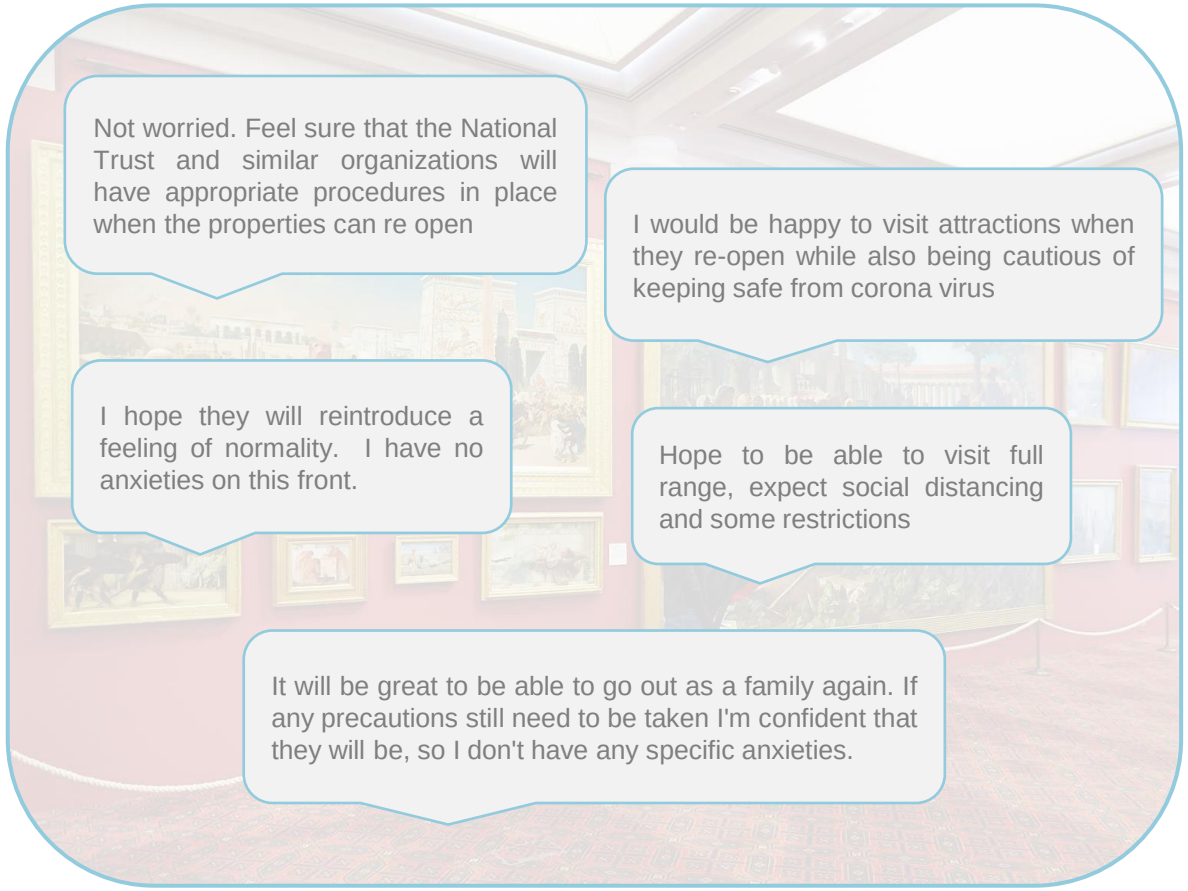
Q: Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties?

Bases: All respondents (Wave 6 – main sample, 694, Wave 7 – main sample, 687)

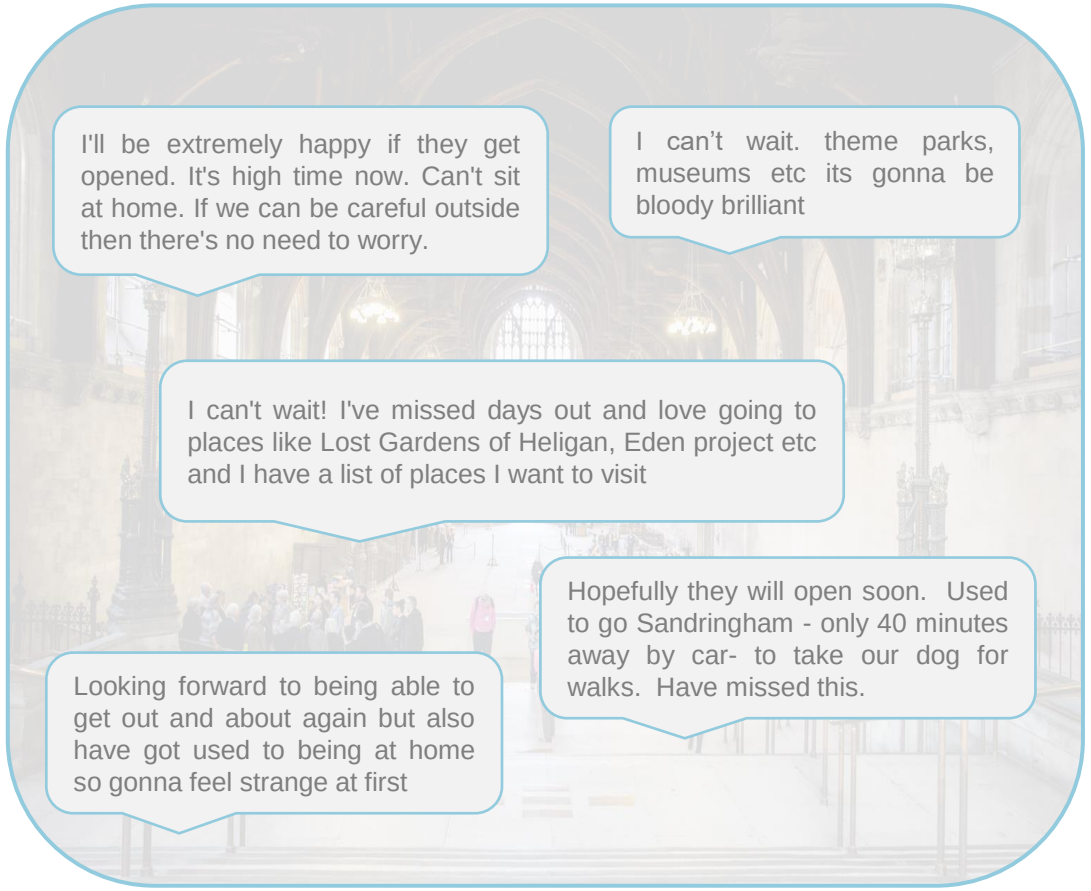
The positive and safe visit experiences of 2020 have helped to lay the foundation for visitor confidence in 2021, now that anxiety across society appears to be easing

ALVA
Attractions Recovery Tracker

No worries / fine (13%)



Excited / can't wait to return (17%)



Q. In what ways do you currently feel differently about the prospects of visiting attractions, compared with how you felt during the first lockdown in April to June last year?

Bases: All respondents Wave 7 – main sample (687)

Although there is no doubt that the majority of the public will be expecting good safety measures to remain, there is a minority who will not visit until a ‘normal’ experience can be delivered

ALVA
Attractions Recovery Tracker

7% questioned whether the experience would be as good as before
- increasingly around not visiting until ‘normality’ resumed

I'm excited about it. I just want to get out and see somewhere different after being stuck largely at home for basically weeks on end with only a handful of shops and places to visit. My main concerns would be that social distancing rules would make places less enjoyable and more stressful to visit so I'd hope they are kept to a minimum or are quickly got rid of.

I am looking forward to visiting attractions again and do not really have any anxieties or worries. I do not intend to do so until all restrictions are removed, hopefully in June, so I do not feel they will diminish the experience too much

My worry is that these places will ruin the experience by having Covid mania measures in place. I don't want ANY of them, things should return to normality as they were before.

Depends on the attraction. I wouldn't go to a theme park if there are loads of restrictions as it would waste time

I just hope we can enjoy them again without too many restrictions. Its time to get back to normal and enjoy life again.

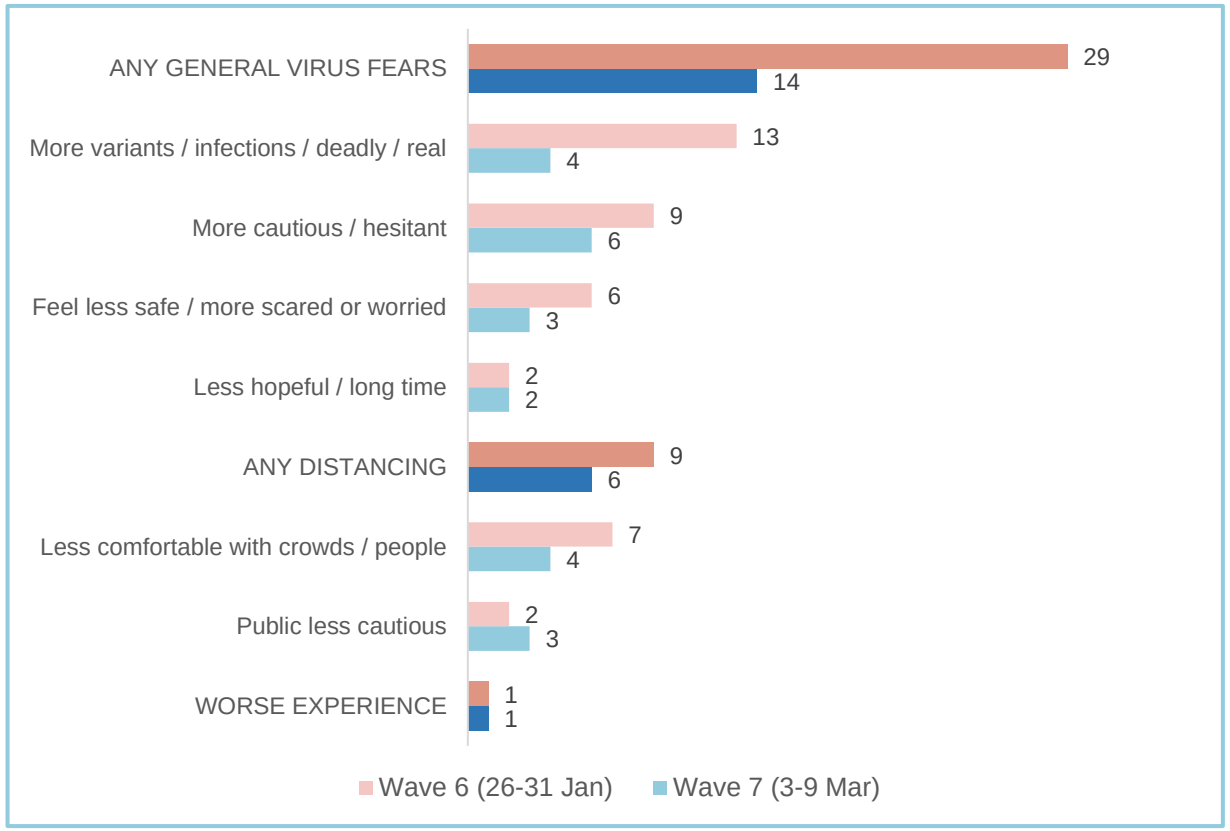
I am hoping to visit some homes and gardens, without masks and. social distancing. I have no worries.

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 7 (687)

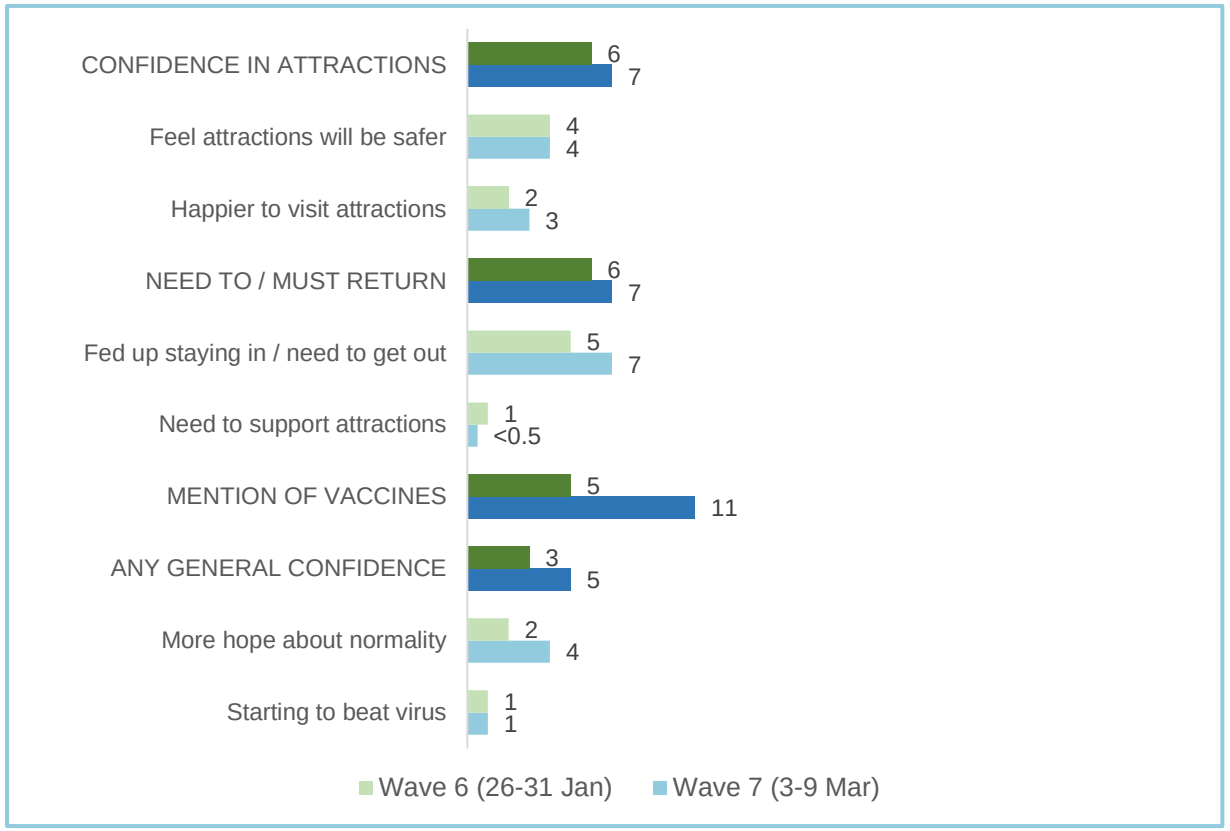
Driven by less anxiety about new variants and high infection rates, plus the vaccine rollout, the public is now feeling far more positive about the prospect of visiting attractions

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

22% feel LESS positive about prospect of visiting attractions than in first lockdown *(39% at Wave 6 – end Jan)*



29% feel MORE positive about prospect of visiting attractions than in first lockdown *(18% at Wave 6 – end Jan)*



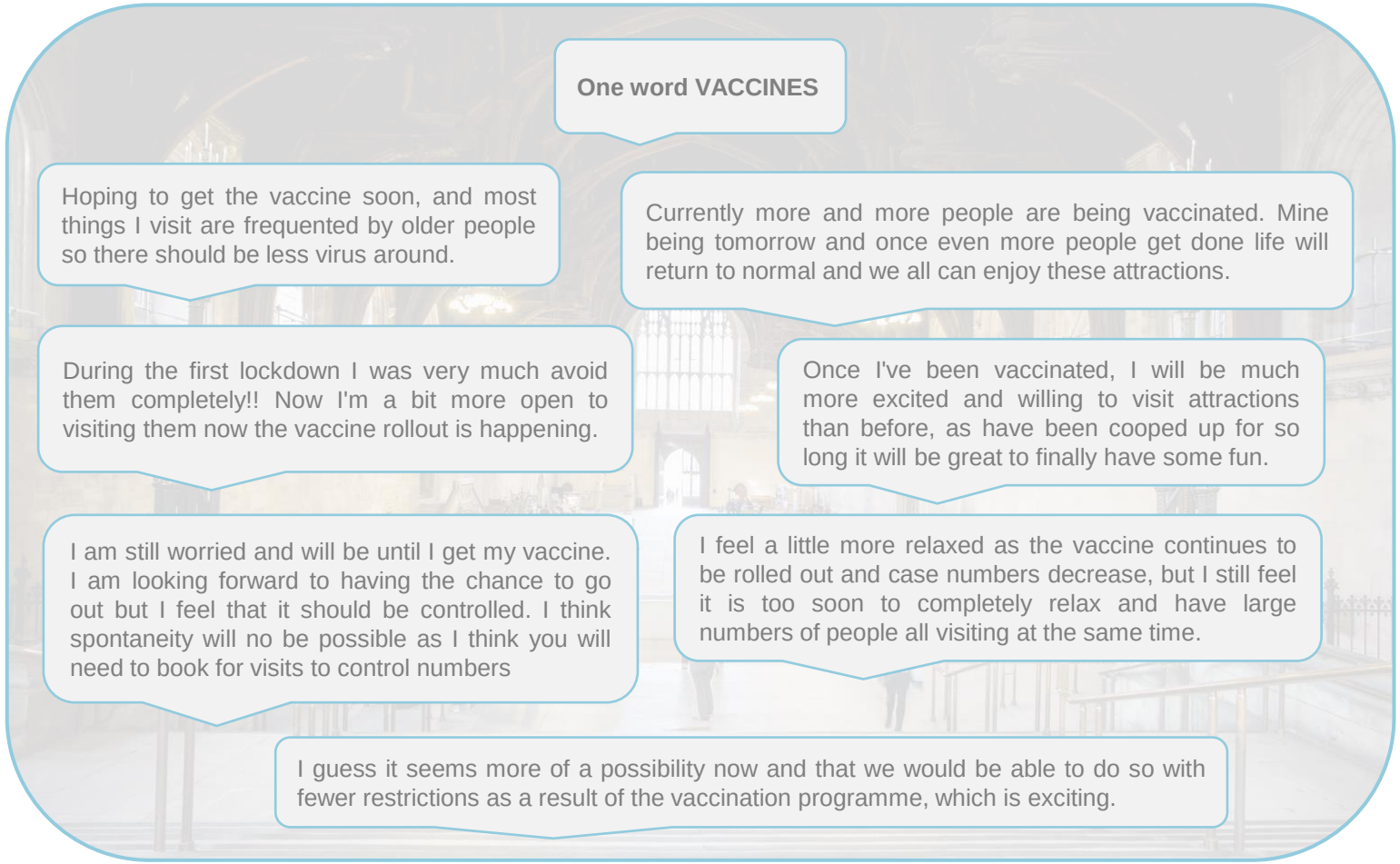
Q. In what ways do you currently feel differently about the prospects of visiting attractions, compared with how you felt during the first lockdown in April to June last year?

Bases: All respondents (Wave 6 – main sample, 694, Wave 7 – main sample, 687)

Since end January, the positive impact of the vaccination programme on public confidence in visiting attractions has increased significantly

ALVA
Attractions Recovery Tracker

11% mentioned vaccines when asked what is <u>different</u> now compared with first lockdown
(only 5% at Wave 6 - end January)

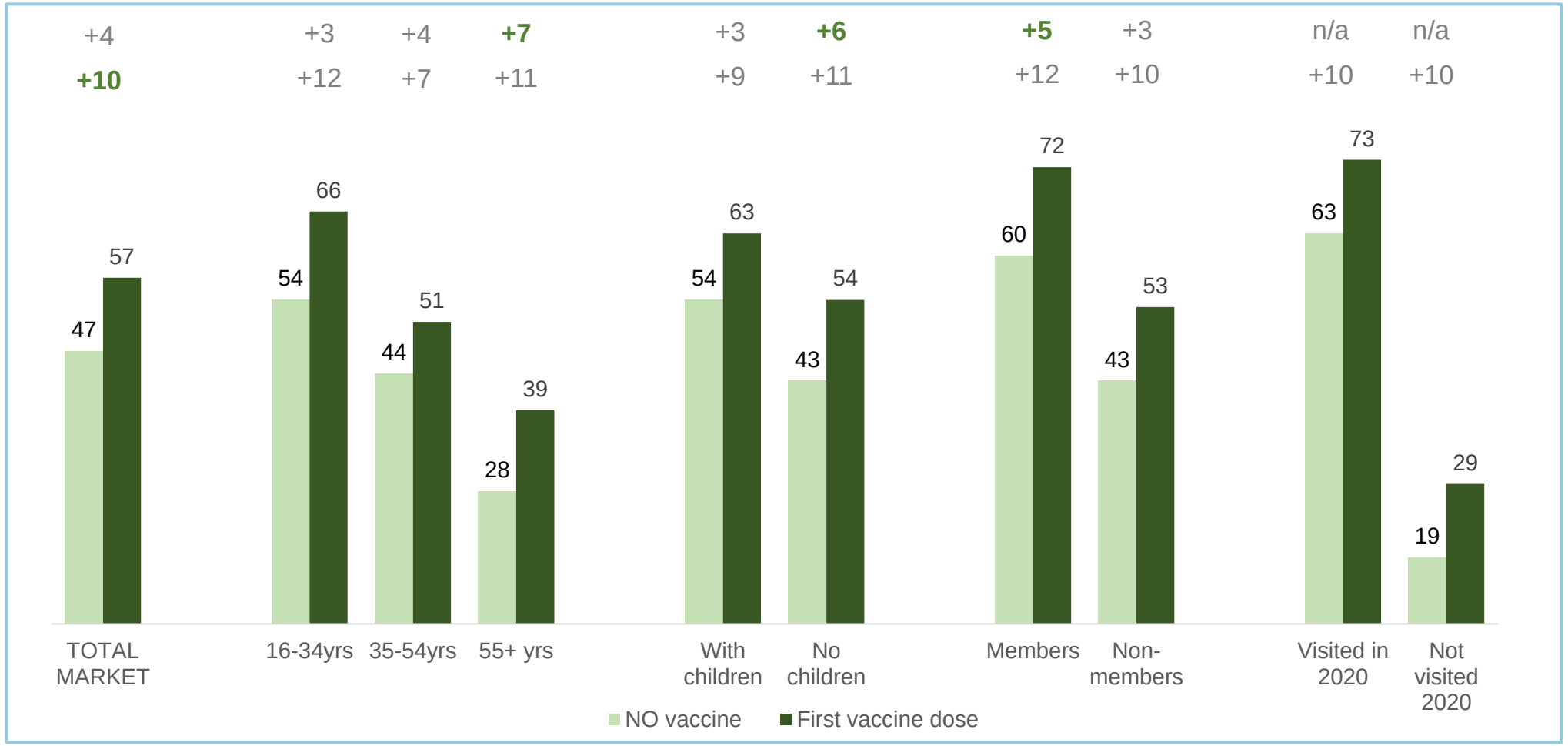


Q: Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties?
Q. In what ways do you currently feel differently about the prospects of visiting attractions, compared with how you felt during the first lockdown in April to June last year?
Bases: All respondents Wave 7 – main sample (687)

An additional 10% of the market claim that they will visit ‘as soon as the opportunity arises’ once they are given the first vaccine dose. This is a marked increase compared with a month ago and is having an impact across all age groups

Wave 7: Any 'I have already visited in Jan/Feb this year' or ‘as soon as opportunity arises’ (%)

Vaccine Impact



Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)

Q: Assuming you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who say will refuse vaccine)

Base: All respondents yet to have the first vaccine dose (Wave 7: 408)

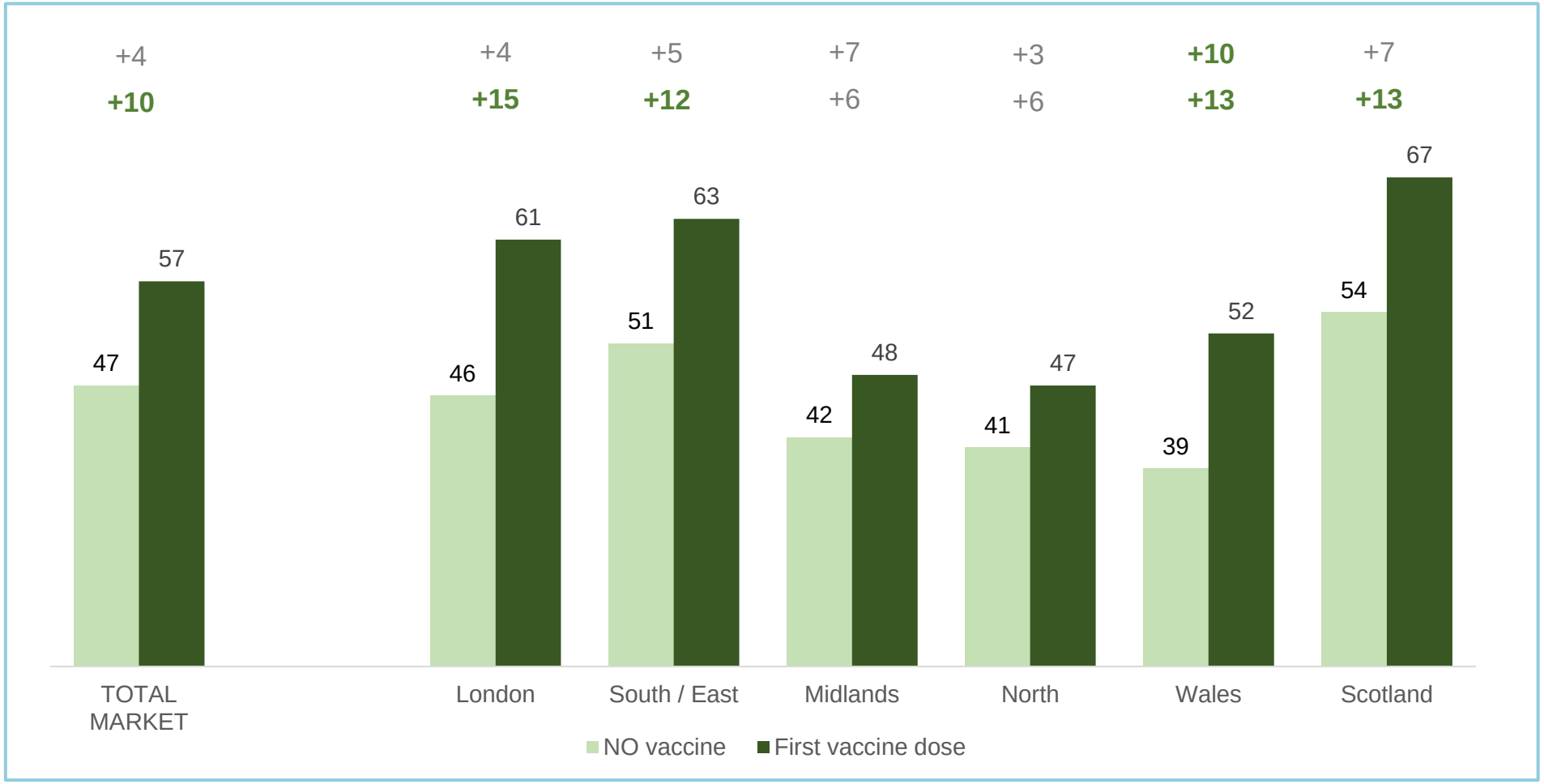
Regionally, the vaccine is having the strongest positive impact upon confidence in visiting attractions among residents of southern England, Scotland and Wales at present

ALVA
Attractions Recovery Tracker

Wave 7: **Any *'I have already visited in Jan/Feb this year' or 'as soon as opportunity arises'* (%)**

Vaccine Impact

	TOTAL MARKET	London	South / East	Midlands	North	Wales	Scotland
Wave 6:	+4	+4	+5	+7	+3	**+10**	+7
Wave 7:	**+10**	**+15**	**+12**	+6	+6	**+13**	**+13**



Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)
Q: Assuming you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who say will refuse vaccine)
Base: All respondents yet to have the first vaccine dose (Wave 7: 408)

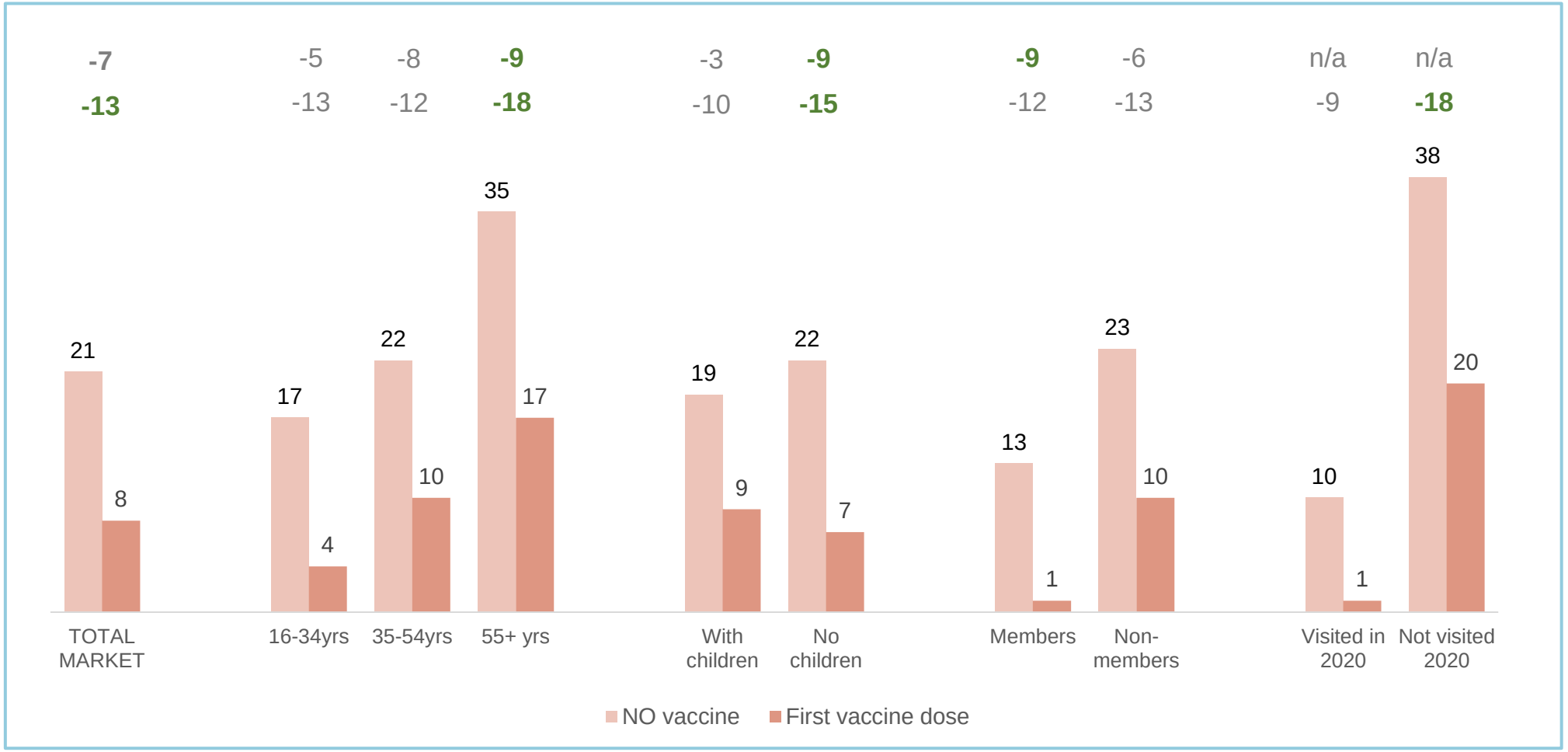
But perhaps an even bigger impact appears to be encouraging the 'stubbornly cautious' to at least consider visiting; the proportion of the market saying that they would be unlikely to visit any attraction for a long time more than halves when given the first vaccine dose

ALVA
Attractions Recovery Tracker

***Wave 7:* All *'unlikely to visit for a long time'* (%)**

Vaccine Impact

	TOTAL MARKET	16-34yrs	35-54yrs	55+ yrs	With children	No children	Members	Non-members	Visited in 2020	Not visited 2020
Wave 6:	**-7**	-5	-8	**-9**	-3	**-9**	**-9**	-6	n/a	n/a
Wave 7:	**-13**	-13	-12	**-18**	-10	**-15**	-12	-13	-9	**-18**

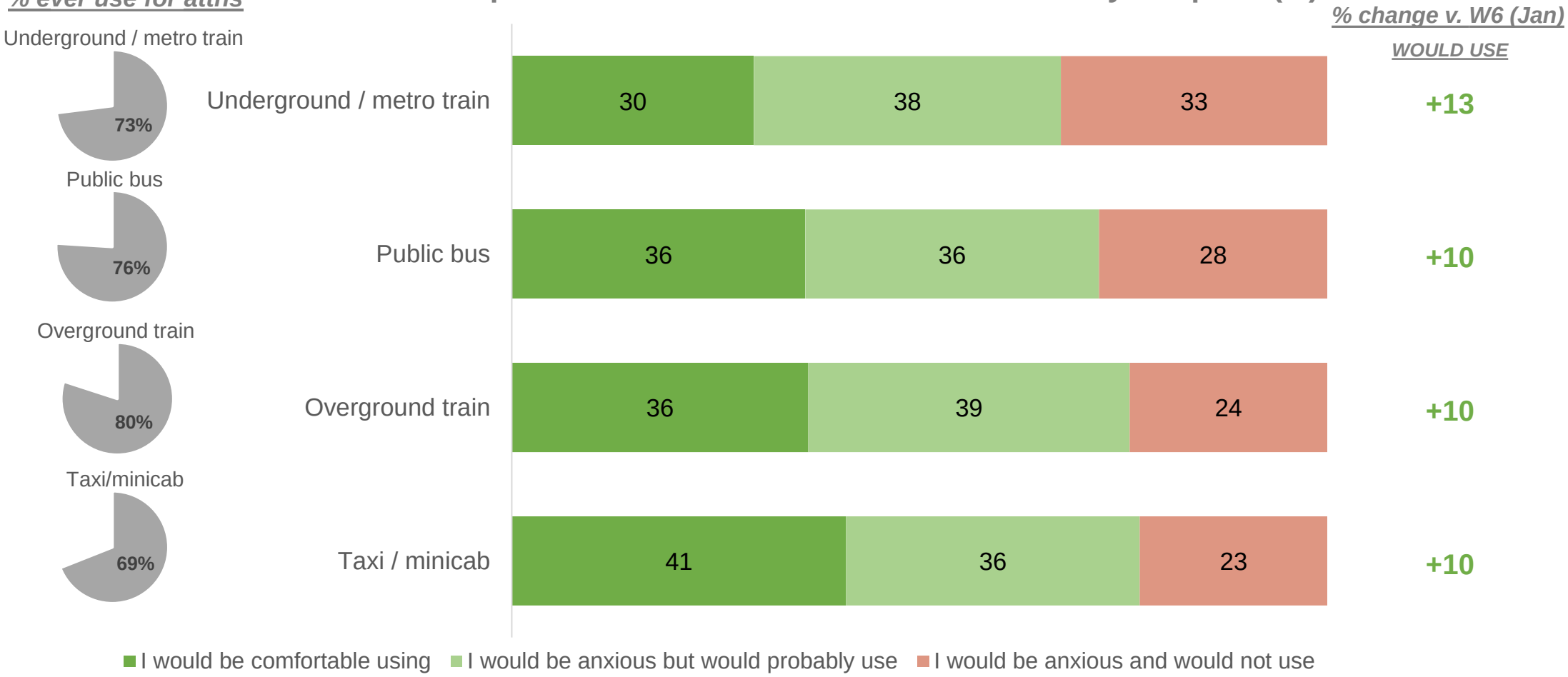


Q: Assuming you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who have already had vaccine)
Q: Assuming you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visit each of these types of attraction after they re-open? (N.B. Includes those who say will refuse vaccine)
Base: All respondents yet to receive first vaccine dose (Wave 7: 408)

There has been a very strong increase in confidence around use of public transport since end January at a national level

ALVA
Attractions Recovery Tracker

Wave 7: How will you feel about using each of these types of public transport to travel to visitor attractions after they re-open? (%)



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

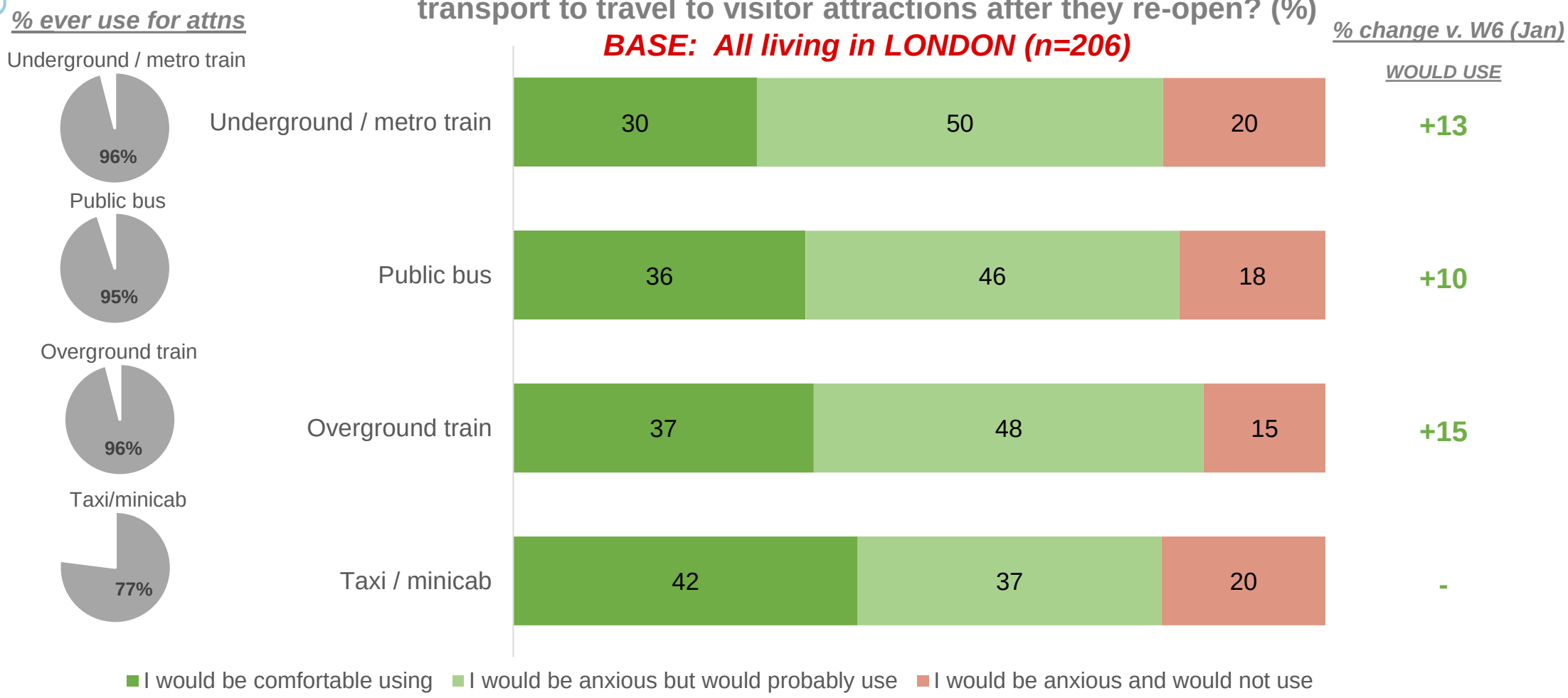
Base: All who ever use each form of transport to travel to visitor attractions, Wave 7

Confidence around use of public transport to travel to attractions has also increased sharply among Londoners, with only around a fifth now claiming that they would not use

ALVA
Attractions Recovery Tracker

***Wave 7:* 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=206)



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 7

How can we build trust and confidence in visiting?

What should we do?

What should we say?

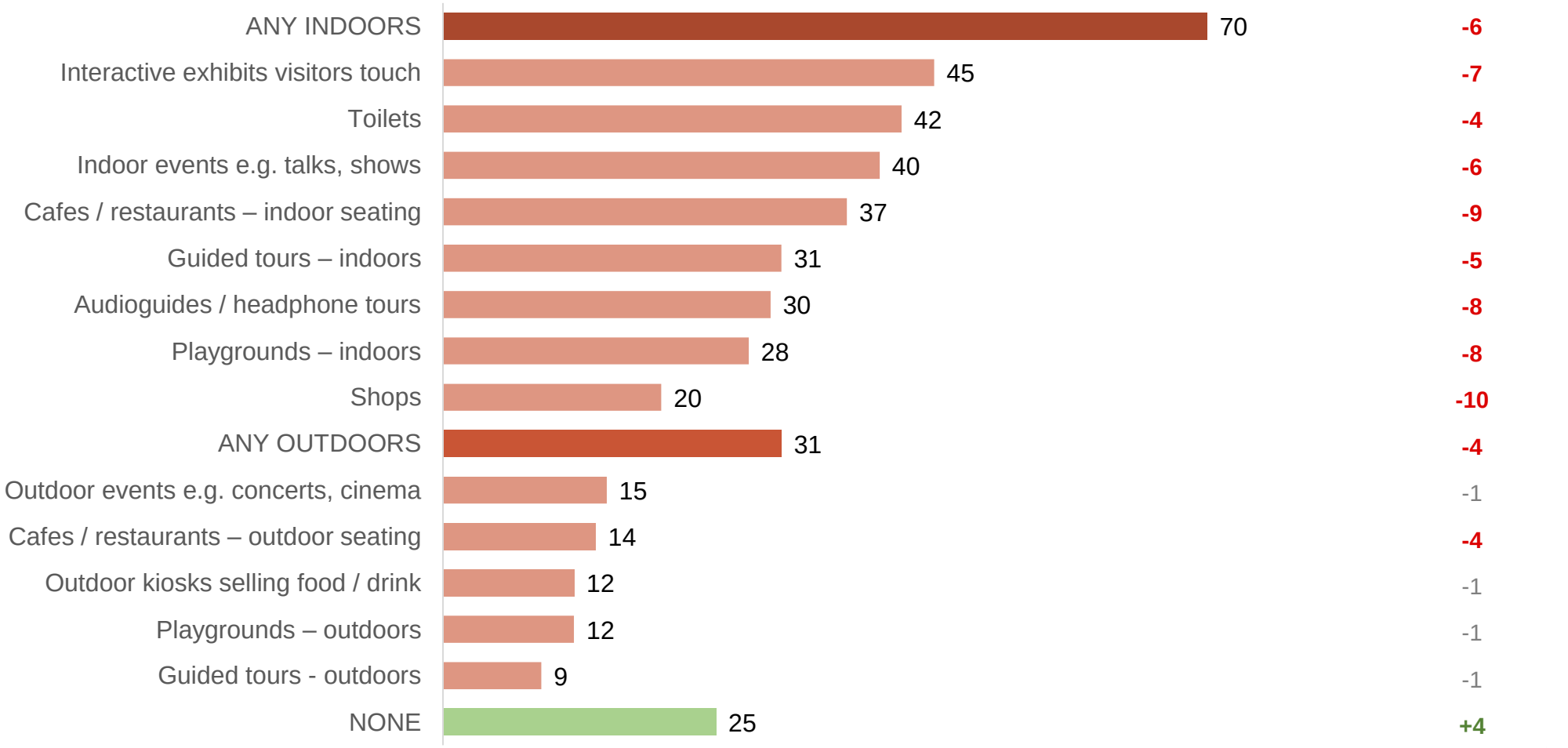
ALVA

decision house

Since end January there has been a significant drop in the proportion of the market who will feel more anxious than usual about using indoor attraction facilities after re-opening

ALVA
Attractions Recovery Tracker

***Wave 7:* Will feel more anxious or uncomfortable about using than usual at attractions (%)**

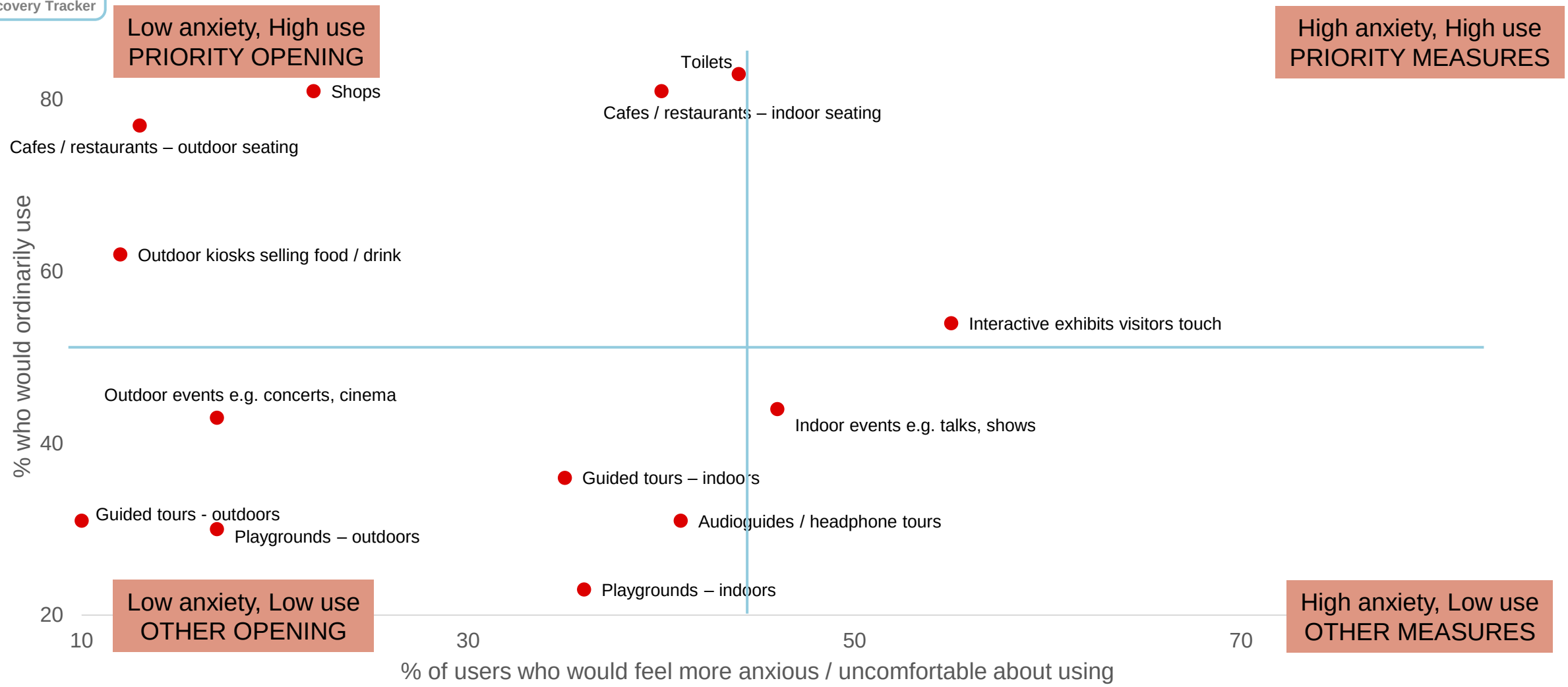


Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual after they re-open?
Base: All respondents (Wave 6: 869, Wave 7: 1,090)

Anxiety around using toilets and indoor cafes has eased significantly. Perhaps only interactives might be considered high priority for strong, overt mitigating measures needed to encourage visits

ALVA
Attractions Recovery Tracker

Wave 7: Level of anxiety among those who would ordinarily use

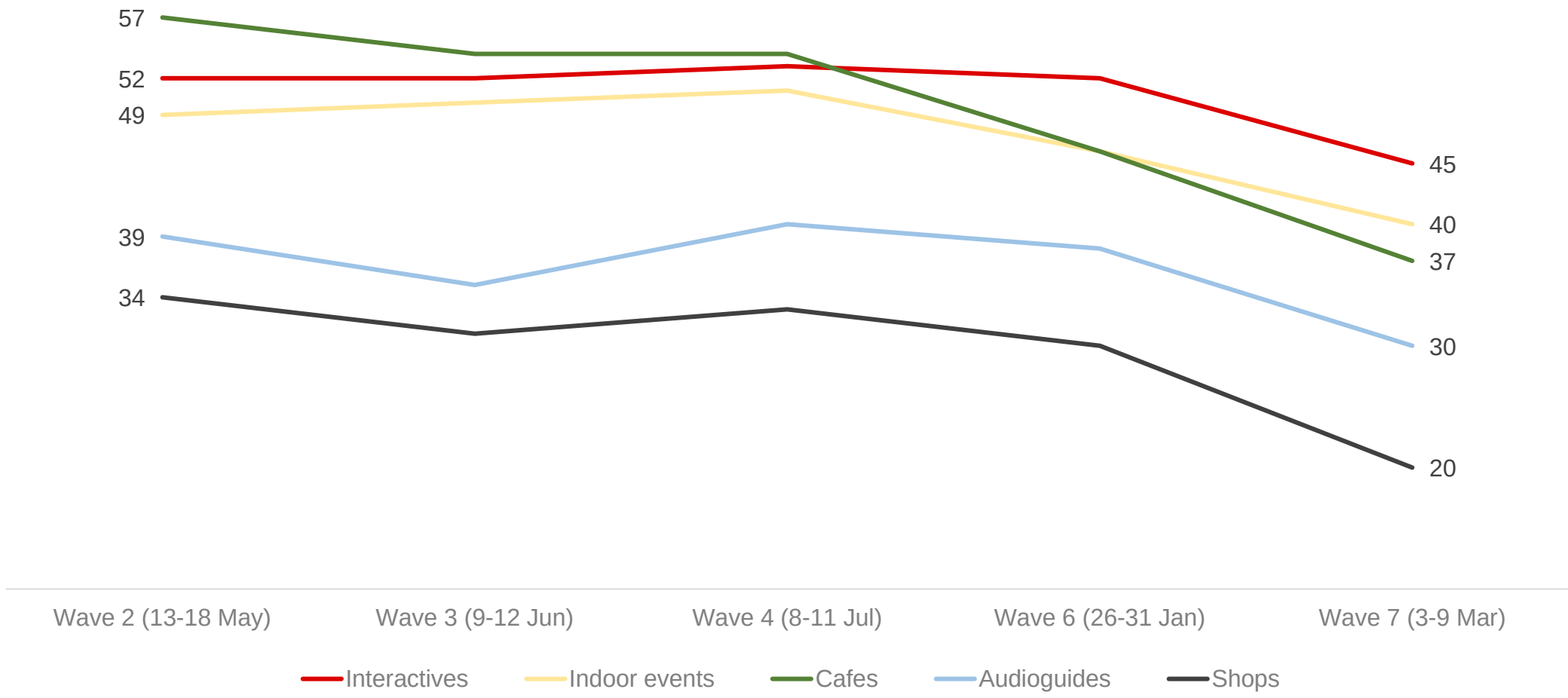


Q: At visitor attractions, which of these, if any, would you feel more anxious or uncomfortable about using than usual when they re-open?
Base: All respondents, Wave 7 (1,090)

Although anxiety remains notable for many facilities, concern is now much lower than during 2020

ALVA
Attractions Recovery Tracker

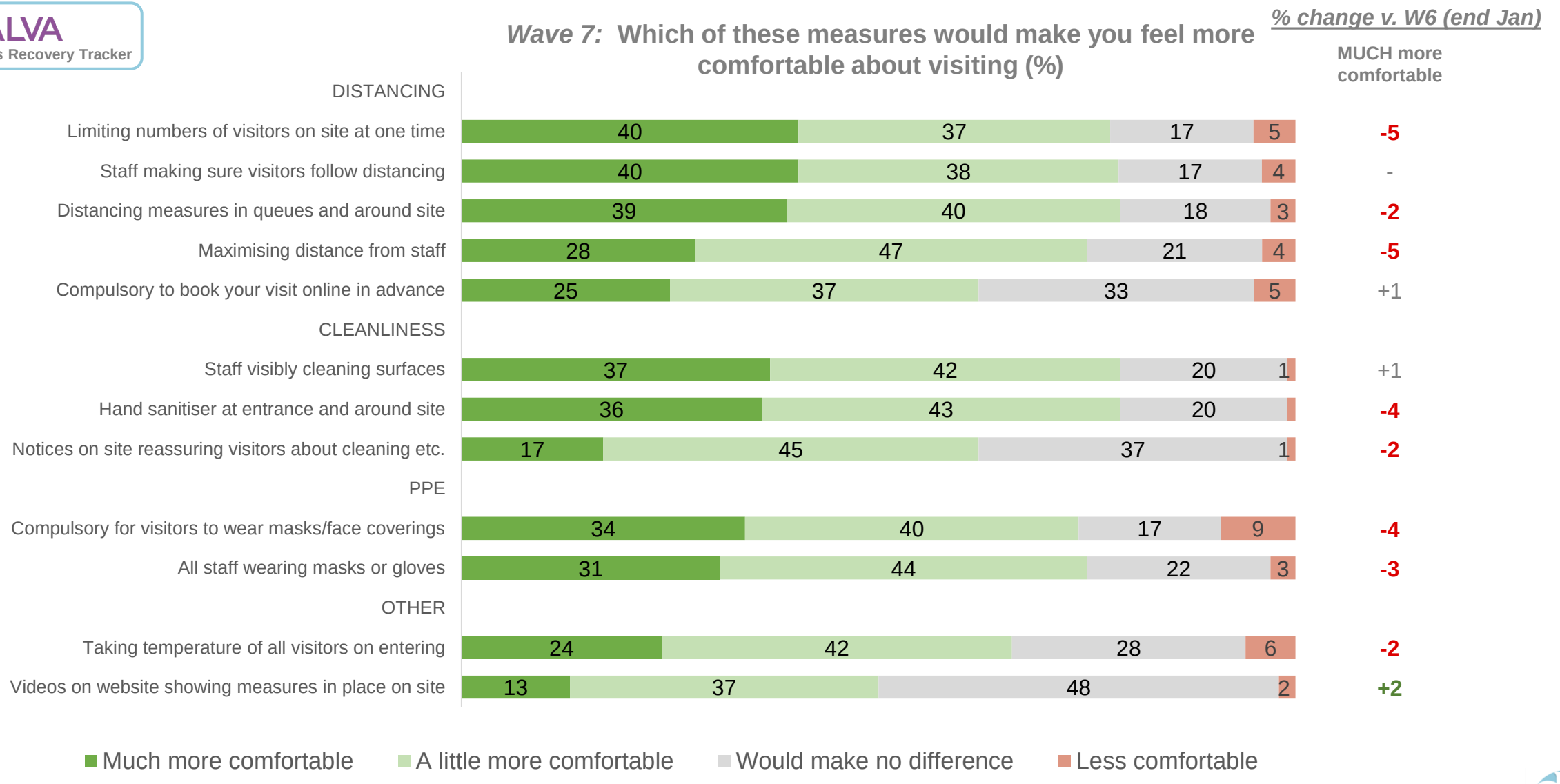
Will feel more anxious or uncomfortable about using than usual at attractions (%)



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

Most safety measures will still be highly comforting to visitors, although with visit confidence now growing their impact on the visit decision is perhaps diminishing a little

ALVA
Attractions Recovery Tracker

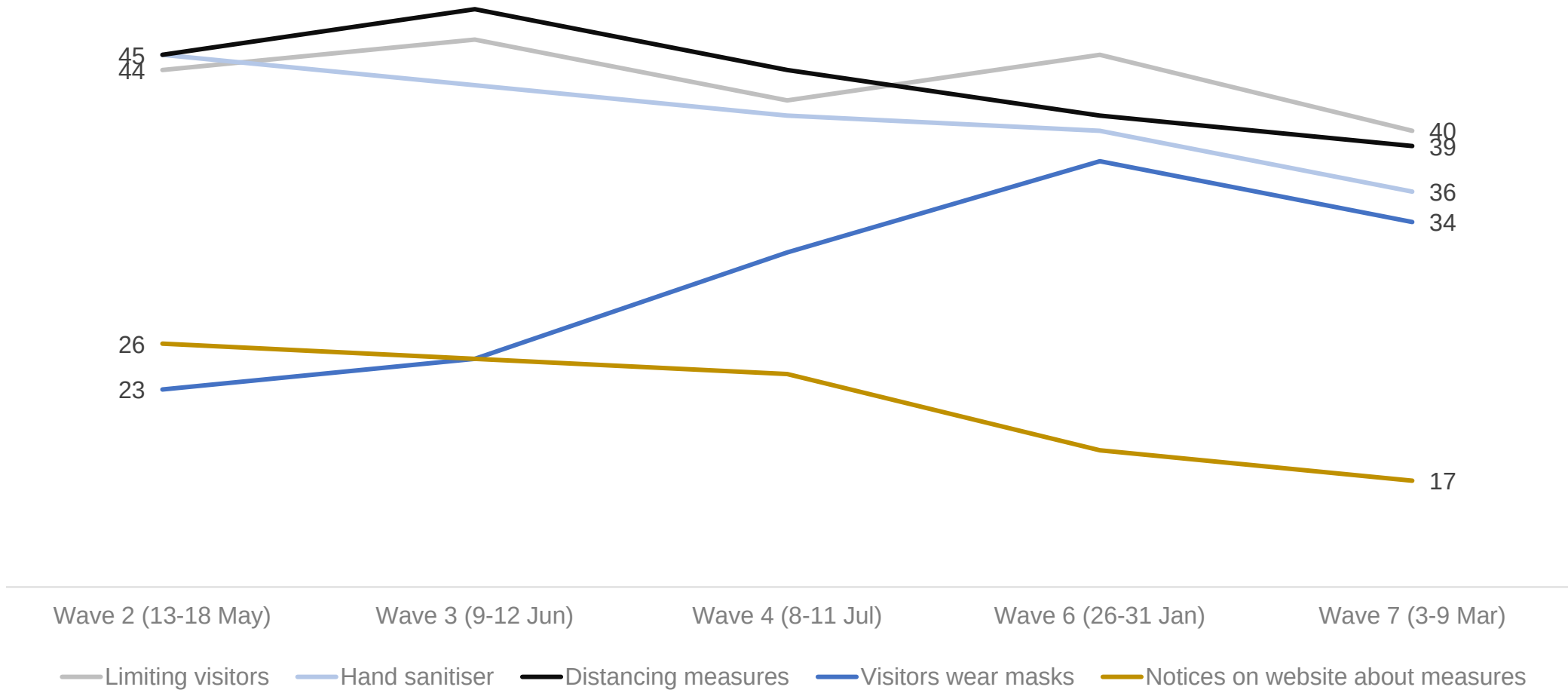


Q: **Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?**
Bases: All respondents – Wave 7 (1,090)

As time has progressed, the positive impact of safety measures on visitor anxiety has gradually reduced (with the notable exception of face coverings)

ALVA
Attractions Recovery Tracker

Which of these measures would make you feel MUCH more comfortable about visiting (%)



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

A reminder about tracking visitors at your attraction:
ALVA Visitor Recovery Benchmarking

ALVA

Visitor tracking survey to understand how visitors have been reacting to safety measures, their impact on visit experience as well as how visitor profile, motivations and marketing triggers are changing

Story so far……. 44 attractions participating and 43,000 visitor survey responses

Going forward……. extended to at least end August

A reminder:

- Online post-visit survey sent to visitors
- Questionnaire updated for Jan-Jun 2021 period: esp. how safety measures have impacted the visit experience
- Results via online dashboard and analysis tool on a shared basis - benchmarks for sectors and individual attractions
- Bespoke questions and reporting available
- Low cost – less than £1,000 per attraction, with large discounts for multiple attractions

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

decision house

Key take-outs

Key take-outs / 1 *(Wave 7: 3-9 March)*

Since end January there has been a notable positive shift in confidence around visiting attractions when they re-open. This growth in confidence at a time when a ‘re-opening roadmap’ was announced is particularly impressive given that the May 2020 lockdown easing announcement saw confidence fall

The increase in confidence over the past month has been driven by those who have been lower on confidence throughout the pandemic – particularly older people (aged 40+)

The growth in confidence has also been driven by those living in the south of England and Scotland, with the Midlands and North of England yet to see the same increases

The positive and safe visit experiences at attractions in 2020 have helped to lay the foundations for visitor confidence in 2021, now that anxiety appears to be easing

This easing of anxiety and growth in confidence is being driven primarily by less concern around new variants and high infection rates, plus perceived success around the vaccine rollout

decision house

Key take-outs / 2 *(Wave 7: 3-9 March)*

The recent positive impact of the vaccination programme on public confidence has been particularly noteworthy – having the first vaccine dose now increases the proportion saying they will visit any attraction from 47% to 57% (+10%). This compares with an uplift of just 44% to 48% (+4%) at end January

Vaccines are having a strong positive impact on visit confidence across all age groups, although impact is lower in the Midlands and North of England regions at present (uplift of +6%)

The impact of the vaccine is even more effective in encouraging the fearful to at least consider a visit - moving people from ‘unlikely to visit for a long time’ to ‘wait and see what happens for a short while’

Since end January there has been a significant drop in the proportion of the market who will feel more anxious than usual about using indoor attraction facilities after re-opening. Anxiety is now lower than 2020

Most safety measures will still be highly comforting to visitors, although with visit confidence now growing, their impact on the visit decision is perhaps diminishing a little. There is now a small minority (around 7%) who will not visit until a ‘normal’ experience can be delivered

There has been a very strong increase in confidence around use of public transport to travel to attractions

decision house

Contact

Steve Mills, *Director*

+44 (0) 7532 666884

+44 (0) 20 3287 9444

steve.mills@decisionhouse.co.uk

www.decisionhouse.co.uk

@decision_house

Questionnaire: *Wave 6 (26-31 Jan 2021)*

***ATTRACTIONS RECOVERY TRACKER* QUESTIONNAIRE – WAVE 6**

SAMPLE DEFINITION:

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

QA. **During 2019 (so before the Coronavirus pandemic), approximately how many times did you go to visitor attractions In the UK, either on day trips from home or whilst on holiday? By visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.**

More than 20 times
11-20 times
8-10 times
5-7 times
3-4 times
Once or twice
Not at all

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

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they re-open to the public following the current lockdown. Again, by visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q1. **Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.**
OPEN RESPONSE
_____

Q2. **In what ways do you currently feel differently about the prospect of visiting attractions, compared with how you felt during the first lockdown in April to June last year? Please give as much detail as possible.**
OPEN RESPONSE
_____

Q3. **Can we just check, which of these types of attraction have you visited at all since June last year, so since the first lockdown ended? RANDOMISE ORDER**

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions
None of these

Q4. **Can we just check, have you received at least the first dose of the Covid-19 vaccine?**

1. Yes
2. No, but I will take it when offered
3. No and I will not take it
4. Prefer not to say

IF CODES 2 OR 4 AT Q4, ASK BOTH Q5A AND Q5B
IF CODE 1 AT Q4, ASK Q5A ONLY
IF CODE 3 AT Q4, ASK Q5B ONLY

ROTATE Q5A AND Q5B

Q5a. **Assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited (the outdoor elements) in January this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5b. **Assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited (the outdoor elements) in January this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

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

Q6. **Thinking about when you start considering visiting attractions again after they re-open, which of these measures would make you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.**
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

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

Q7a. **Again, thinking about when you start considering visiting attractions again after they have re-opened, which of these, if any, would you feel more anxious or uncomfortable about using than usual? RANDOMISE ORDER**

Q7b. **Before the Coronavirus outbreak, which of these did you ever use at visitor attractions?**

Cafes / restaurants – indoor seating areas
Cafes / restaurants – outdoor seating areas
Outdoor kiosks selling food / drink
Shops
Toilets
Playgrounds – indoors
Playgrounds – outdoors
Audioguides / headphone tours
Guided tours – indoors
Guided tours - outdoors
Indoor events e.g. talks, shows
Outdoor events e.g. concerts, cinema
Interactive exhibits that visitors touch in some way
Other (please tell us what_____) [ONLY SHOWN IN Q5a NOT Q5b]
None

Q8. **Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. Again, thinking about when you start considering visiting attractions again after they have re-opened, how do you feel about using each of these types of public transport to travel to visitor attractions? RANDOMISE ORDER**
(I am / would be comfortable using, I am / would be anxious but would probably use, I am / would be anxious and would not use, I never travelled to attractions using this transport anyway)

Underground / metro train
Overground train
Public bus
Taxi / minicab

Q9. **Before the Coronavirus outbreak, how often would you say that you tended to visit each of these types of attraction? RANDOMISE ORDER**
(Every couple of weeks or more often, About once a month, Every 2-3 months, Every 4-6 months, About once a year, Less often, Never)
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q10. **Which, if any, of these organisations are you currently a member, season ticket holder or Friend of?**
National Trust
English Heritage
RHS
National Art Pass (Art Fund)
Merlin Pass
Other historic/heritage attraction
Other garden attraction
A museum or gallery
A zoo/wildlife attraction or farm
Another type of visitor attraction
None of these

Q11. **Which of the following best describes you?**
I tested positive for Covid-19 during 2020 or 2021
I did not test positive for Covid-19 but I had the recognised symptoms
I did not test positive for Covid-19 and I have not had the symptoms
Prefer not to say

DEMOGRAPHICS COLLECTED:
Age
Age of children in household
Gender
Region of Residence
Social Grade

Questionnaire: *Wave 7 (3-9 Mar 2021)*

***ATTRACTIONS RECOVERY TRACKER* QUESTIONNAIRE – WAVE 7**

SAMPLE DEFINITION:

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

QA. **During 2019 (so before the Coronavirus pandemic), approximately how many times did you go to visitor attractions in the UK, either on day trips from home or whilst on holiday? By visitor attractions we mean places like museums, art galleries, historic houses and sites, castles, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.**
More than 20 times
11-20 times
8-10 times
5-7 times
3-4 times
Once or twice
Not at all

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

MAIN QUESTIONNAIRE

INTRODUCTORY TEXT: The next few questions are about your feelings on the subject of visiting attractions after they re-open to the public following the current lockdown. Again, by visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q1. **Please tell us in your own words how you currently feel about visiting attractions after they have re-opened to the public. What are your hopes? What are your worries or anxieties? Please give as much detail as possible.**
OPEN RESPONSE
_____

Q2. **In what ways do you currently feel differently about the prospect of visiting attractions, compared with how you felt during the first lockdown in April to June last year? Please give as much detail as possible.**
OPEN RESPONSE
_____

Q3. **Can we just check, which of these types of attraction have you visited at all since June last year, so since the first lockdown ended? RANDOMISE ORDER**

Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions
None of these

Q4. **Can we just check, have you received at least the first dose of the Covid-19 vaccine?**
1. Yes
2. No, but I will take it when offered
3. No and I will not take it
4. Prefer not to say

IF CODES 2 OR 4 AT Q4, ASK BOTH BLOCKS Q5A, Q5AI AND Q5B, Q5BI
IF CODE 1 AT Q4, ASK Q5A AND Q5AI ONLY
IF CODE 3 AT Q4, ASK Q5B AND Q5BI ONLY

ROTATE Q5A, Q5AI AND Q5B, Q5BI IN TWO BLOCKS

Q5a. **Assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited (the outdoor elements) in January/February this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5ai. **And still assuming that you had received at least the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of venue after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited in January/February this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

Q5b. **Assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of attraction after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited (the outdoor elements) in January/February this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway

Q5bi. **And still assuming that you had NOT received the first dose of the Covid-19 vaccine, how soon do you think it would be before you visited each of these types of venue after they re-open following the current lockdown? RANDOMISE ORDER**
I have already visited in January/February this year, As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of venue anyway

LIST OF ATTRACTIONS FOR Q5A AND Q5B:
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

LIST OF VENUES FOR Q5AI AND Q5BI:
Theatres
Music concerts (indoors)
Music concerts / festivals (outdoors)

Q6. **Thinking about when you start considering visiting attractions again after they re-open, which of these measures would make you feel more comfortable about visiting? Please sort these into which would make you feel much more comfortable, a little more comfortable, would make no difference or make you feel less comfortable about visiting.**
(Much more comfortable, A little more comfortable, Would make no difference, Less comfortable)

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

Q7a. **Again, thinking about when you start considering visiting attractions again after they have re-opened, which of these, if any, would you feel more anxious or uncomfortable about using than usual? RANDOMISE ORDER**

Q7b. **Before the Coronavirus outbreak, which of these did you ever use at visitor attractions?**
Cafes / restaurants – indoor seating areas
Cafes / restaurants – outdoor seating areas
Outdoor kiosks selling food / drink
Shops
Toilets
Playgrounds – indoors
Playgrounds – outdoors
Audioguides / headphone tours
Guided tours – indoors
Guided tours - outdoors
Indoor events e.g. talks, shows
Outdoor events e.g. concerts, cinema
Interactive exhibits that visitors touch in some way
Other (please tell us what_____) [ONLY SHOWN IN Q5a NOT Q5b]
None

Q8. **Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. Again, thinking about when you start considering visiting attractions again after they have re-opened, how do you feel about using each of these types of public transport to travel to visitor attractions? RANDOMISE ORDER**
(I am / would be comfortable using, I am / would be anxious but would probably use, I am / would be anxious and would not use, I never travelled to attractions using this transport anyway)
Underground / metro train
Overground train
Public bus
Taxi / minicab

ASK ENGLAND RESIDENTS ONLY

Q8a. **The government has stated that the indoor spaces of visitor attractions (including museums, galleries and historic houses) will potentially be allowed to re-open on 17 May. Non-essential shops will potentially be allowed to re-open on 12 April. Which of these statements best describes your feelings about this? RANDOMISE ORDER**
Indoor spaces of visitor attractions should be allowed to re-open at the same time as non-essential shops on 12 April
It is right that the indoor spaces of visitor attractions should only be allowed to open on 17 May
Don't know

Q9. **Before the Coronavirus outbreak, how often would you say that you tended to visit each of these types of attraction? RANDOMISE ORDER**
(Every couple of weeks or more often, About once a month, Every 2-3 months, Every 4-6 months, About once a year, Less often, Never)
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q10. **Which, if any, of these organisations are you currently a member, season ticket holder or Friend of?**
National Trust
English Heritage
RHS
National Art Pass (Art Fund)
Merlin Pass
Other historic/heritage attraction
Other garden attraction
A museum or gallery
A zoo/wildlife attraction or farm
Another type of visitor attraction
None of these