



ALVA Attractions Recovery Tracker

Wave 11

Fieldwork: 18-21 February 2022

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The challenge for 2022

Understanding extent to which **VISIT CONFIDENCE** is returning to pre-pandemic levels

- 🕒 Helping with planning and budgeting for year ahead
- 🕒 Understanding how return of confidence still varies by type of visitor / attraction

What **ACTIONS** might we still need to take to build visit confidence

- 🕒 What are the implications of removing all Covid measures?
- 🕒 How should we physically present ourselves?
- 🕒 How should we communicate with audiences and visitors?



How have we been generating insights?

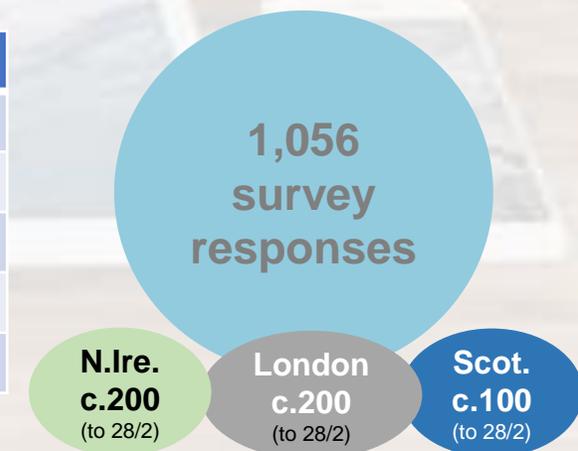
Periodic waves of online research among representative samples of the attractions-visiting public:

“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

	2021 Waves	Sample	Boosts	Prompted by.....
1	26-31 January	869 from UK	London	Winter lockdown
2	3-9 March	1,090 from UK	Lon/Scot	Lockdown easing announced Eng. (22 Feb)
3	21-27 April	1,066 from UK	Lon/Scot	Open shops/outdoor attns. England (12 Apr)
4	17-22 June	884 from UK	London	Announce extending Eng. restrictions (14 Jun)
5	3-9 August	906 from UK	London	Removal of England restrictions (19 Jul)

Wave 11: 18-21 February



Announcement of removal of all restrictions in Eng.



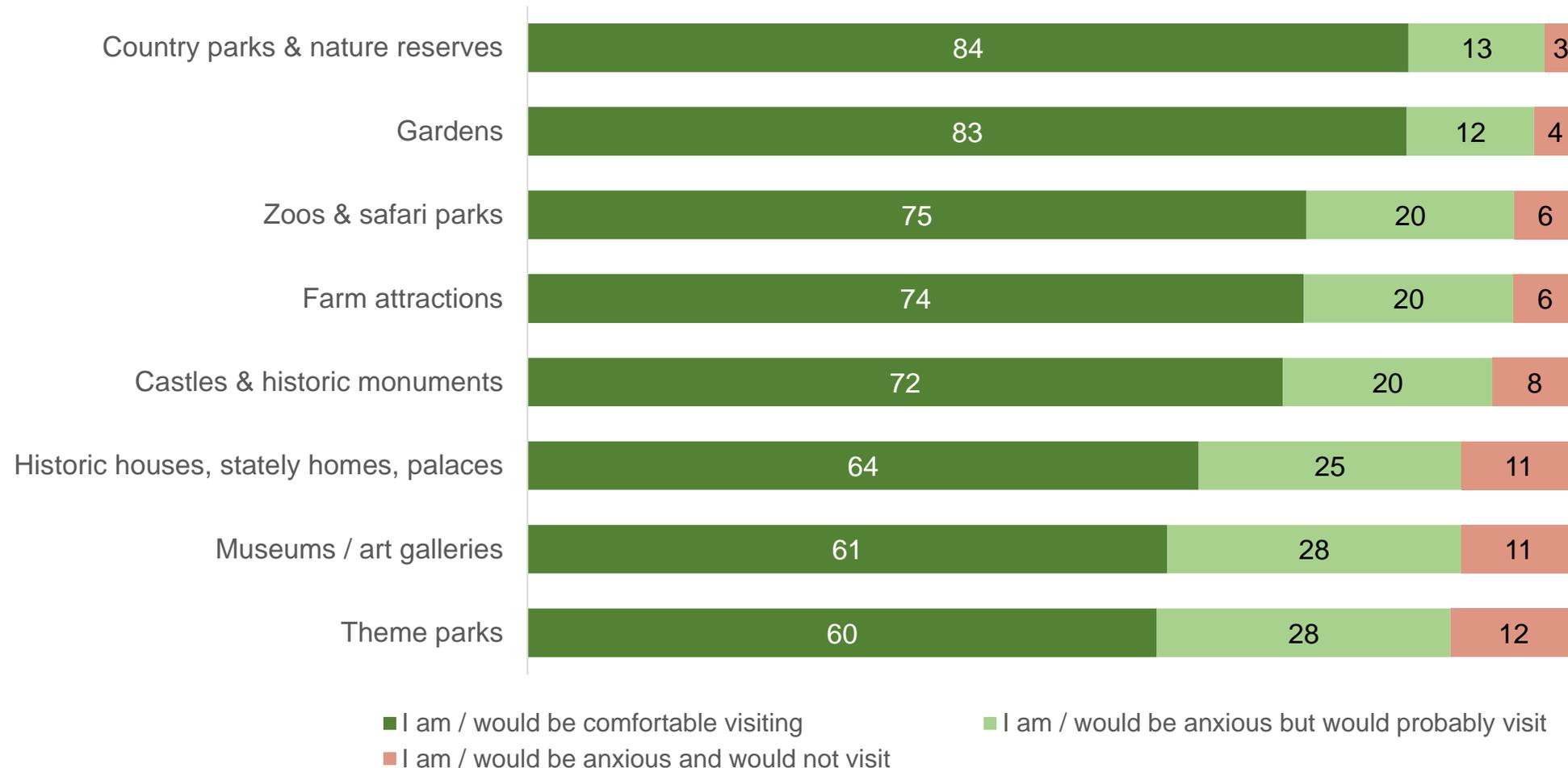
How is the public feeling
about visiting attractions?

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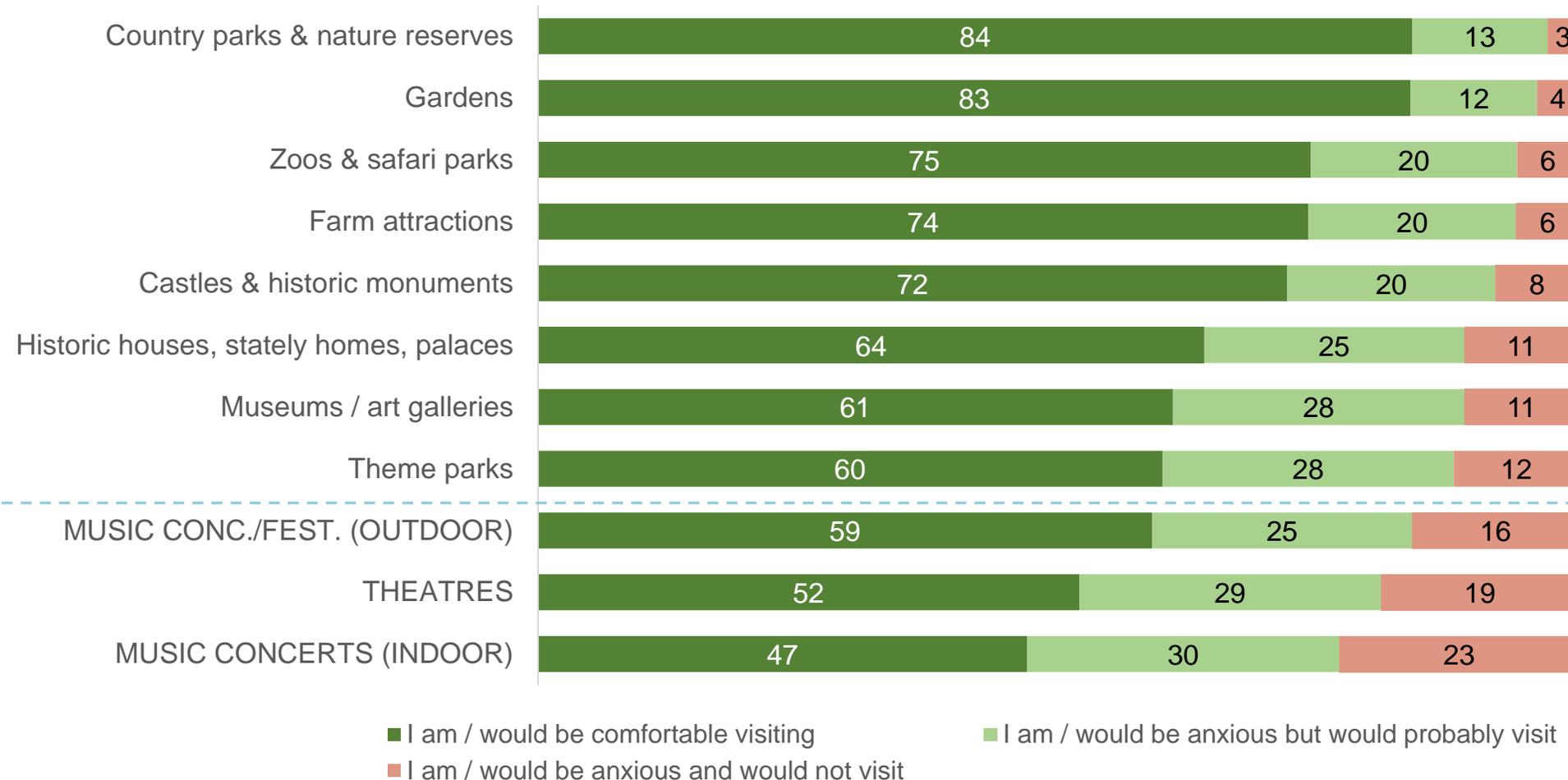
We now see only small minorities whose anxiety is strong enough to prevent them from visiting attractions, although ongoing nervousness is still apparent for many within the market

Wave 11: Attitude towards visiting each of these types of attraction in near future (%)



Indoor music venue and theatre audiences are taking longer to recover their confidence

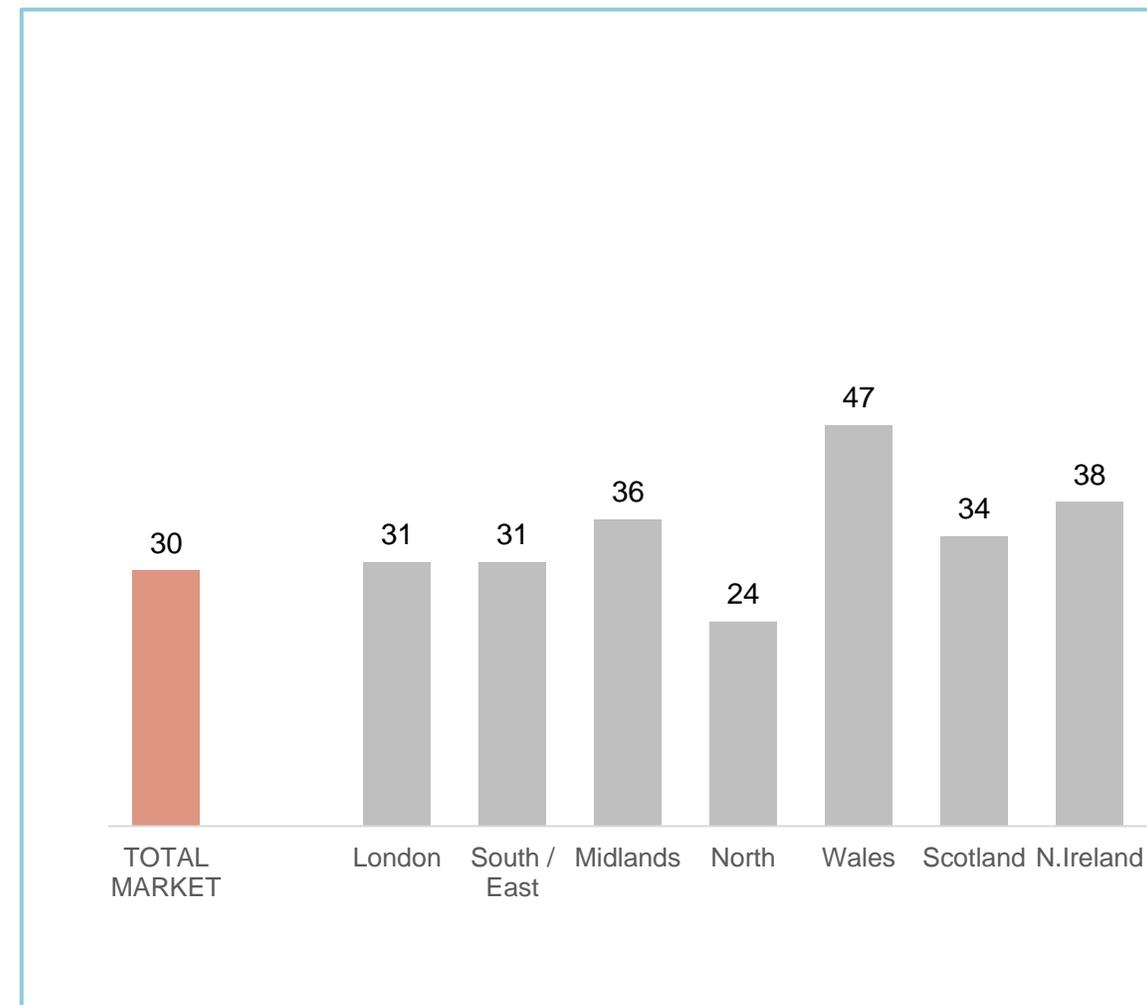
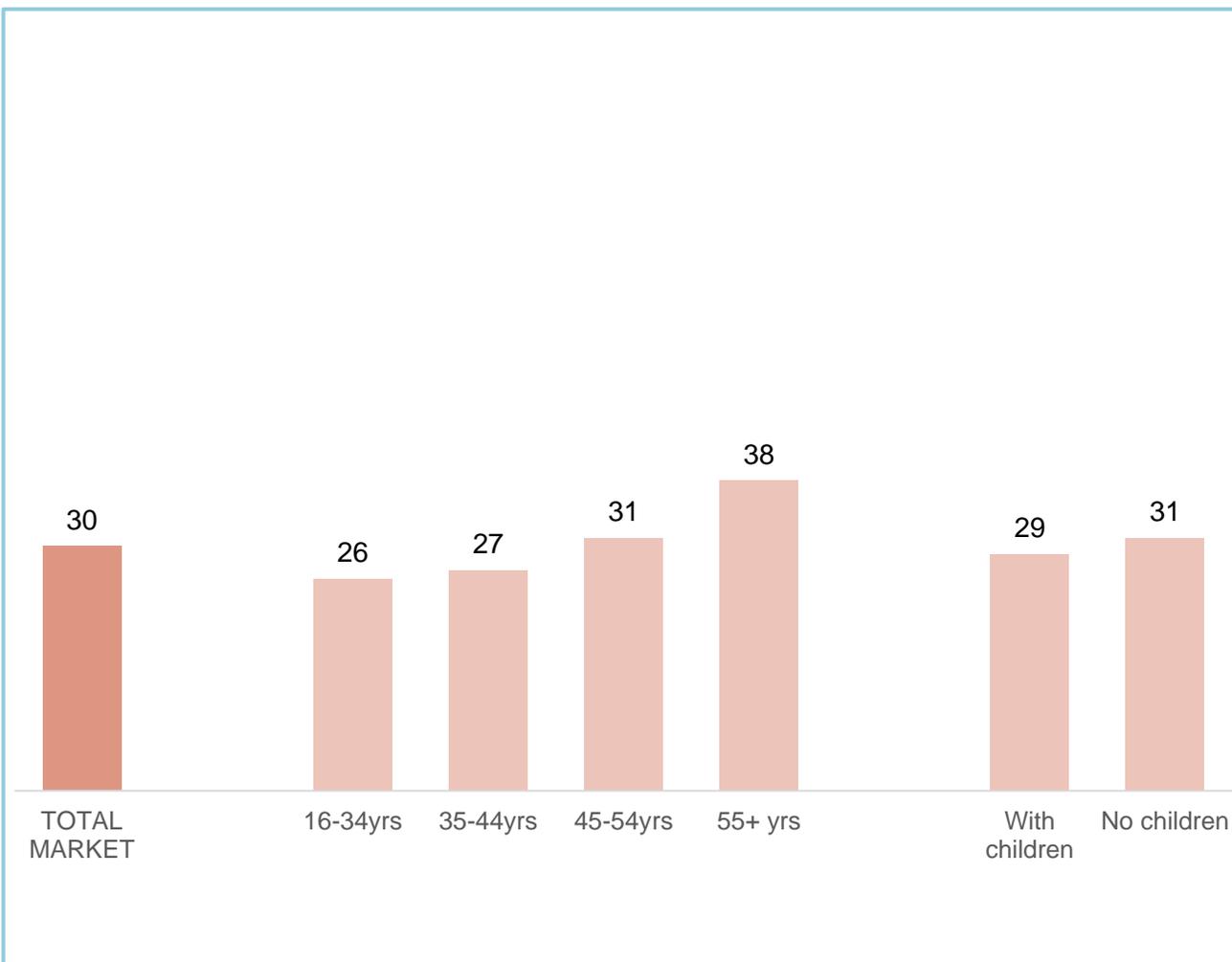
Wave 11: Attitude towards visiting each of these types of attraction / venue in near future (%)



Q: Which one of these best describes your attitude towards visiting each of these types of attraction / venue in the near future?
 Bases: All who tend to visit this type of attraction – Wave 11

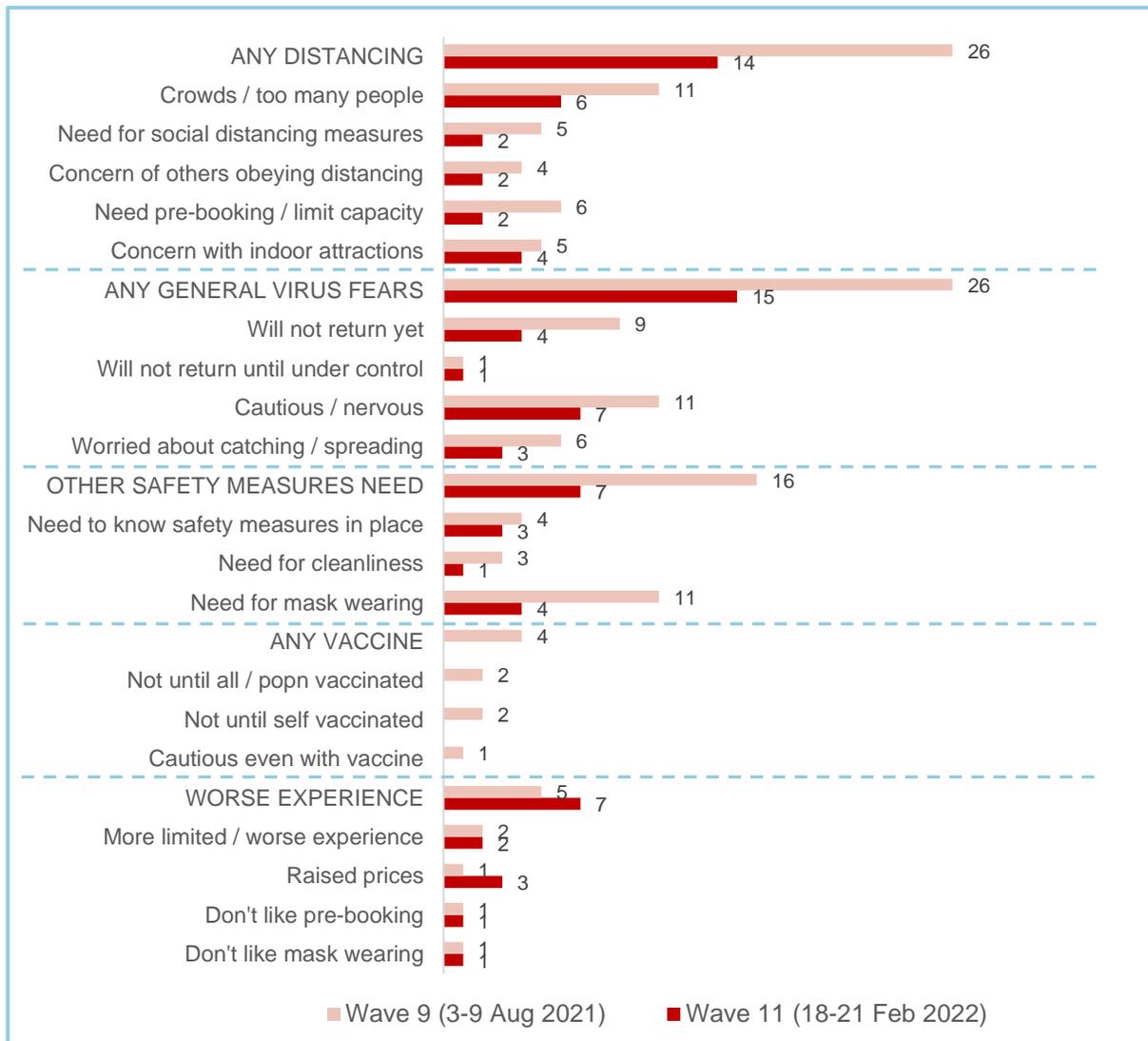
Whilst this anxiety remains higher among the over 55s, it now feels that for those with an ongoing barrier to visit it is embedded within their personal circumstances or character or a reflection of where they live

Any 'I am / would be anxious and would not visit' an attraction / venue (%)

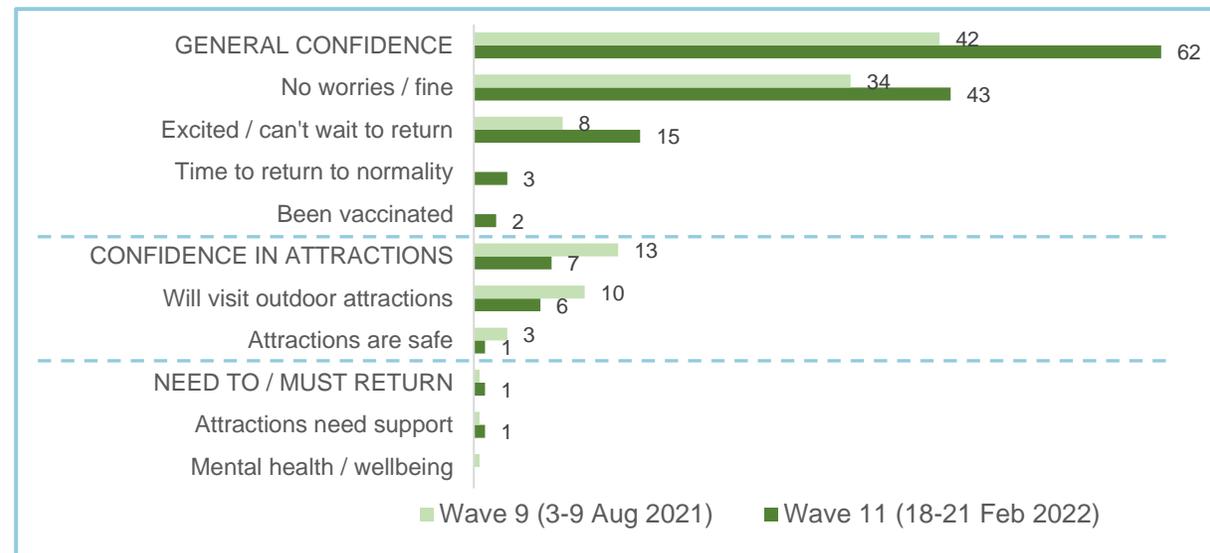


Whilst there has been a very strong shift in positivity since summer 2021, around 40% still express concerns about visiting attractions

40% expressed fear or concerns about visiting
(61% in August 2021)



71% expressed confidence / desire to return
(54% in August 2021)



Q: Please tell us in your own words how you feel about visiting attractions in the near future.

Bases: All respondents (Wave 10 - main sample, 714, Wave 11 - main sample, 718)

There is now much more of a sense that the time has come to return to visiting attractions, although many caveat this with a need for ongoing measures to be retained

General confidence (62%)

I can't wait, especially after the last 2 years of being locked down. I can't wait for museums, weekend walks at beautiful parks, researching what local events are on etc.

I am looking forward to visiting attractions in the near future and getting back to some form of normality and supporting the industry who has lost out over past few years

I feel much more confident than I was earlier in the pandemic and would be open to spending days out now that I've had two vaccinations and one booster dose.

Much more confident and have changed my habits recently, going out to attractions even more than before the pandemic, as I want to make the most out of the great cultural offering we have in this country. In the past week I have visited several cathedrals, castles, ruins, English Heritage sites and town centres and have thoroughly enjoyed it. I intend to continue this in the near future.

I feel comfortable going to visitor attractions, provided they are not too crowded and I don't have to travel there on public transport.

I am happy to visit attractions. All the ones I have visited have had social distancing and safety measures in place. These attractions also need visitors to keep going.

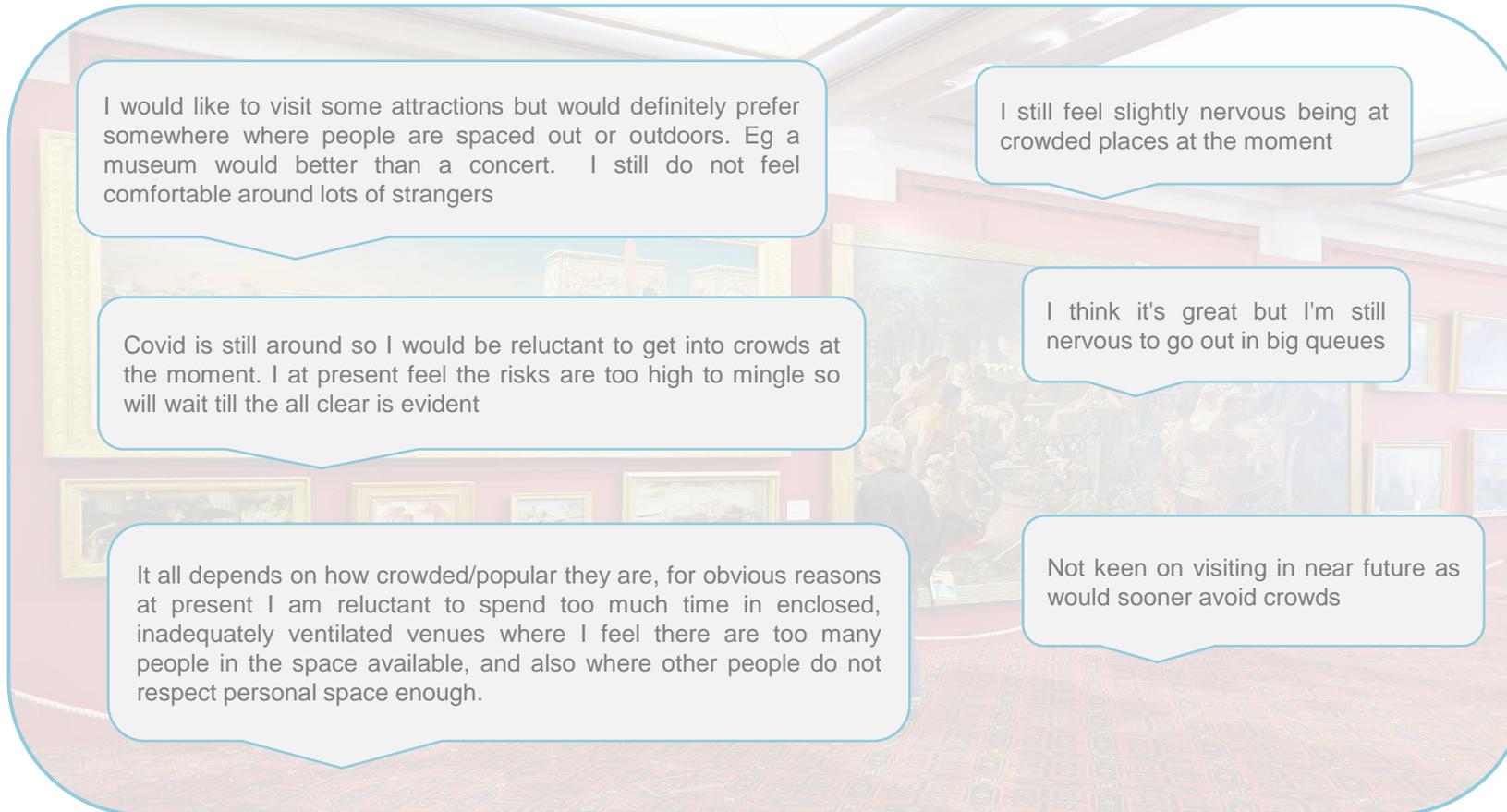
I am happy enough to visit attractions, as long as numbers are limited and social distancing measures are in place.

I feel I am safe enough, and attractions are putting in enough restrictions and precautions, to visit any attraction.

I'm happy to visit in the future but I will continue to wear my mask and frequently use hand sanitizer and social distance where I can

There is a hardcore still worried about crowds, which is driving those who are still anxious

Crowds / too many people (6%)



I would like to visit some attractions but would definitely prefer somewhere where people are spaced out or outdoors. Eg a museum would better than a concert. I still do not feel comfortable around lots of strangers

I still feel slightly nervous being at crowded places at the moment

Covid is still around so I would be reluctant to get into crowds at the moment. I at present feel the risks are too high to mingle so will wait till the all clear is evident

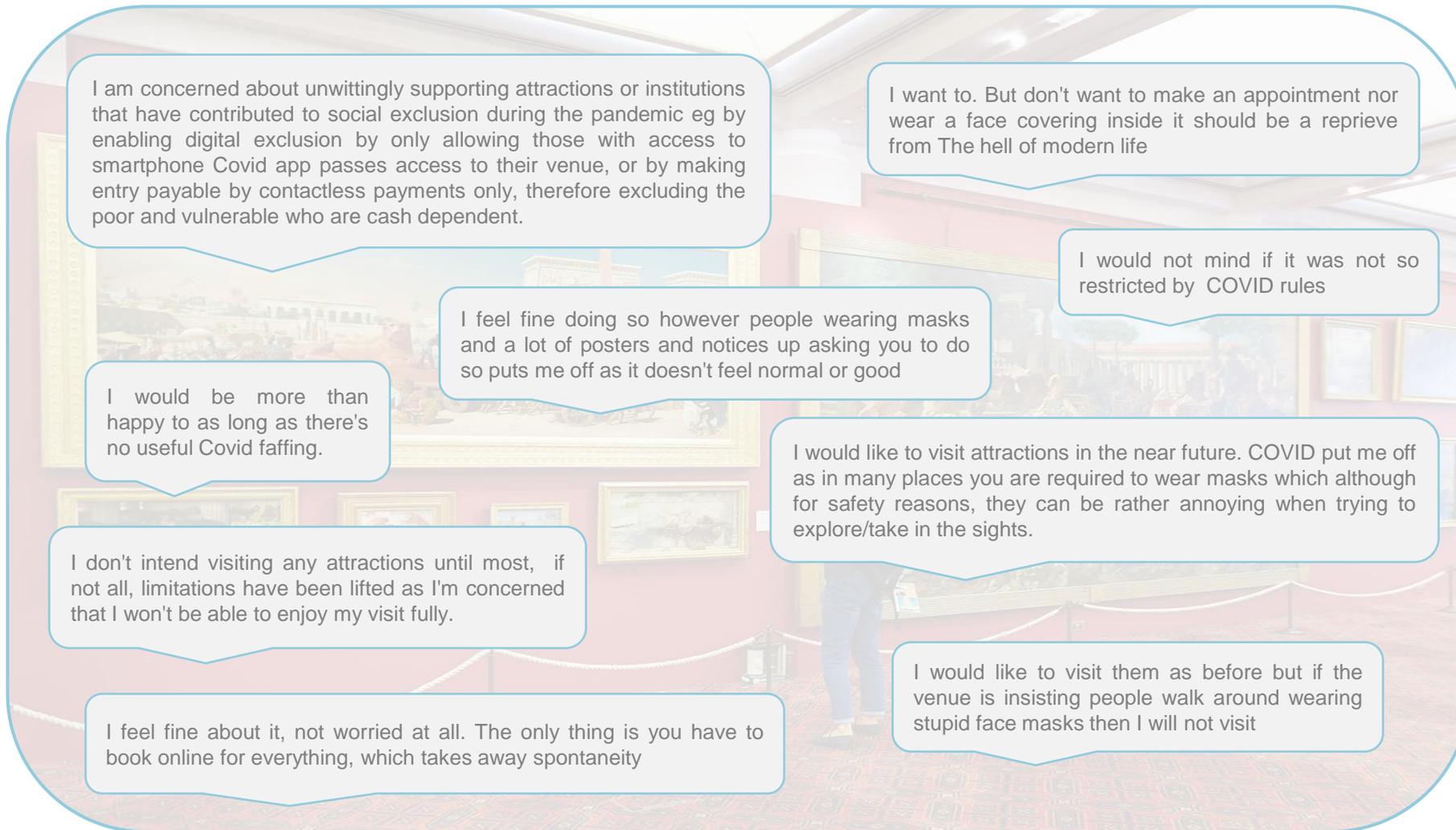
I think it's great but I'm still nervous to go out in big queues

It all depends on how crowded/popular they are, for obvious reasons at present I am reluctant to spend too much time in enclosed, inadequately ventilated venues where I feel there are too many people in the space available, and also where other people do not respect personal space enough.

Not keen on visiting in near future as would sooner avoid crowds

However, there is a growing proportion of the audience who are pushing back against some of the more onerous measures

Concerns that experience will be worse with safety measures (7%)



I am concerned about unwittingly supporting attractions or institutions that have contributed to social exclusion during the pandemic eg by enabling digital exclusion by only allowing those with access to smartphone Covid app passes access to their venue, or by making entry payable by contactless payments only, therefore excluding the poor and vulnerable who are cash dependent.

I want to. But don't want to make an appointment nor wear a face covering inside it should be a reprieve from The hell of modern life

I would not mind if it was not so restricted by COVID rules

I feel fine doing so however people wearing masks and a lot of posters and notices up asking you to do so puts me off as it doesn't feel normal or good

I would be more than happy to as long as there's no useful Covid faffing.

I would like to visit attractions in the near future. COVID put me off as in many places you are required to wear masks which although for safety reasons, they can be rather annoying when trying to explore/take in the sights.

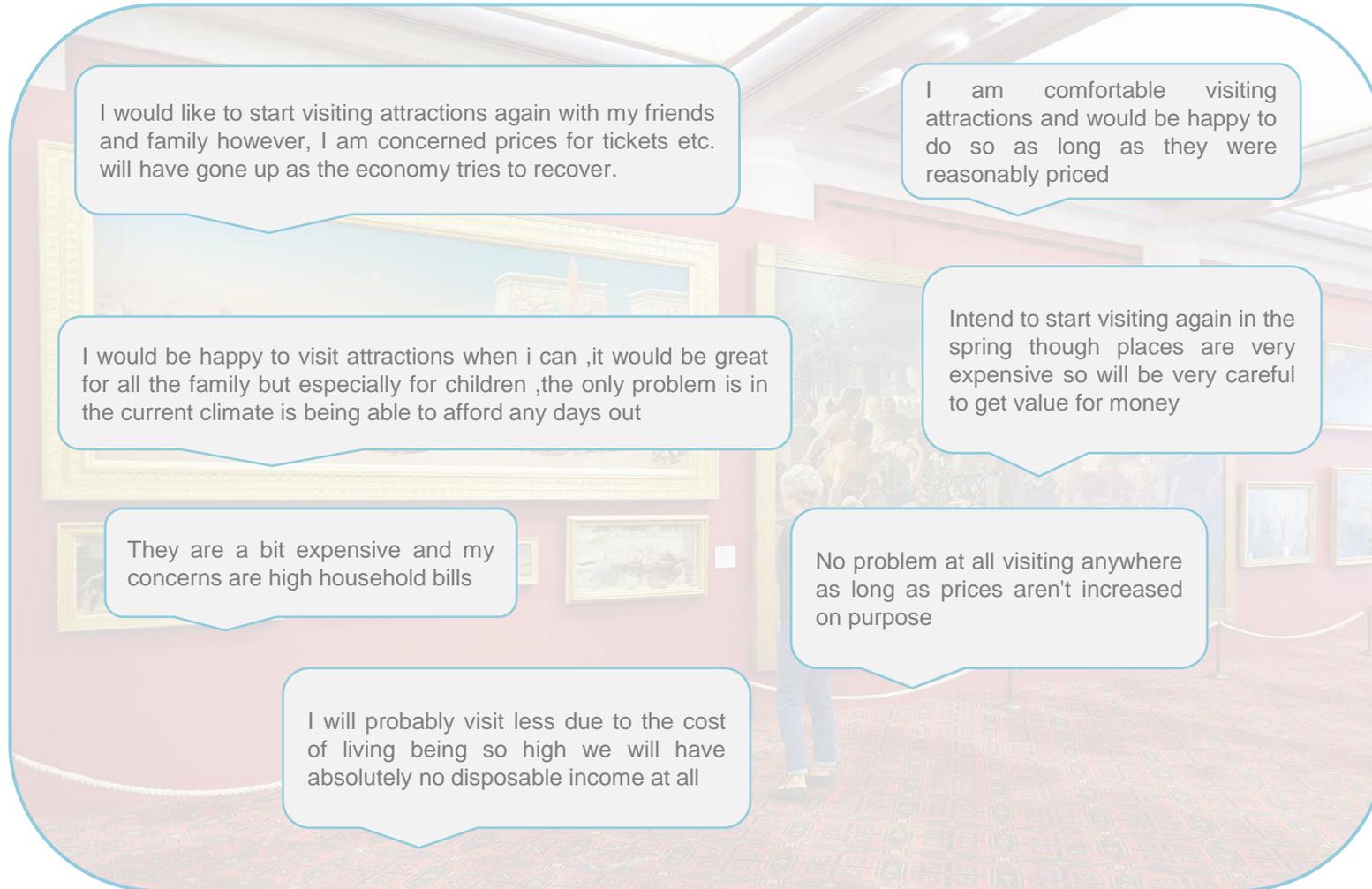
I don't intend visiting any attractions until most, if not all, limitations have been lifted as I'm concerned that I won't be able to enjoy my visit fully.

I would like to visit them as before but if the venue is insisting people walk around wearing stupid face masks then I will not visit

I feel fine about it, not worried at all. The only thing is you have to book online for everything, which takes away spontaneity

There is also a notable minority who have started to comment upon the affordability of attractions in the current economic climate

Expensive / affordability (3%)

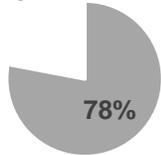


National confidence in the use of public transport to visit attractions has also seen a marked improvement since last summer

Wave 11: How will you feel about using each of these types of public transport to travel to visitor attractions in the near future? (%)

% ever use for attns

Underground / metro train



Public bus



Overground train



Taxi/minicab



% change in 'would use' vs. W10 (Aug '21)

Underground / metro train



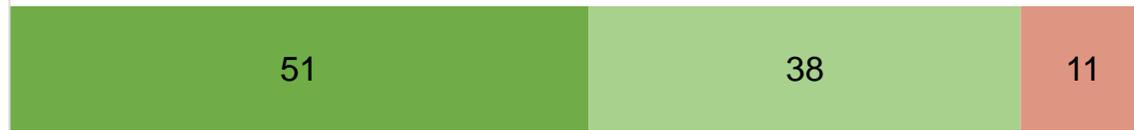
+11

Public bus



+9

Overground train



+19

Taxi / minicab



+8

■ 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 do you feel about using each of these types of public transport to travel to visitor attractions in the near future

Base: All who ever use each form of transport to travel to visitor attractions, Wave 11

Among Londoners, there are now only one in ten who remain so anxious about travelling to attractions by public transport that they would not use it

Wave 11: How will you feel about using each of these types of public transport to travel to visitor attractions in the near future? (%)

BASE: All living in LONDON (n=203)

% change in 'would use'
vs. W10 (Aug '21)

% ever use for attns

Underground / metro train



98%

Public bus



99%

Overground train



97%

Taxi/minicab



85%

Underground / metro train

Public bus

Overground train

Taxi / minicab



+10

+5

+4

+5

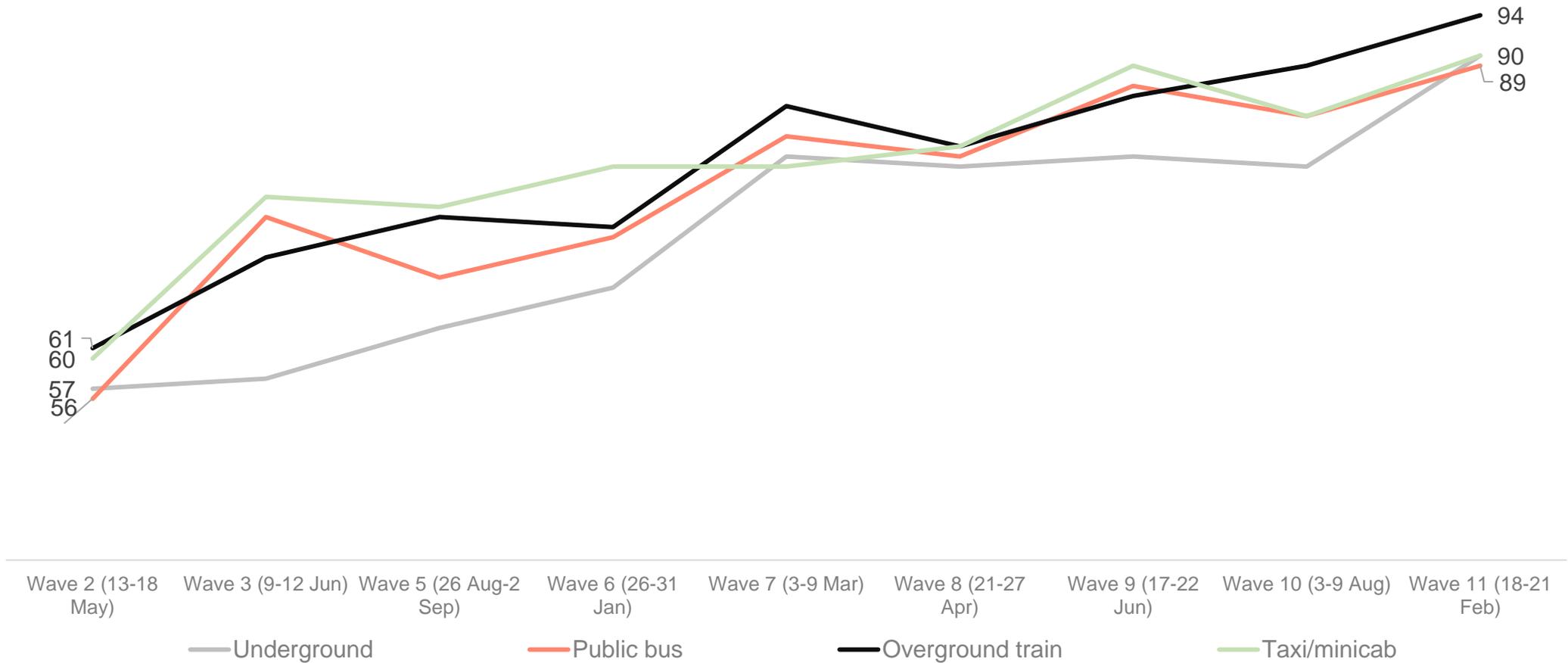
■ I would be comfortable using ■ I would be anxious but would probably use ■ I would be anxious and would not use

Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How do you feel about using each of these types of public transport to travel to visitor attractions in the near future

Base: All LONDONERS who ever use each form of transport to travel to visitor attractions, Wave 11 (203)

Propensity to use public transport among Londoners has increased significantly, even since August 2021

Would be comfortable using / would be anxious but would probably use to visit attractions (%)
 BASE: All living in LONDON



Q: Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How do you feel about using each of these types of public transport to travel to visitor attractions in the near future
 Base: All LONDONERS who ever use each form of transport to travel to visitor attractions



What actions might we still need to take to build trust and confidence?

What should we do?

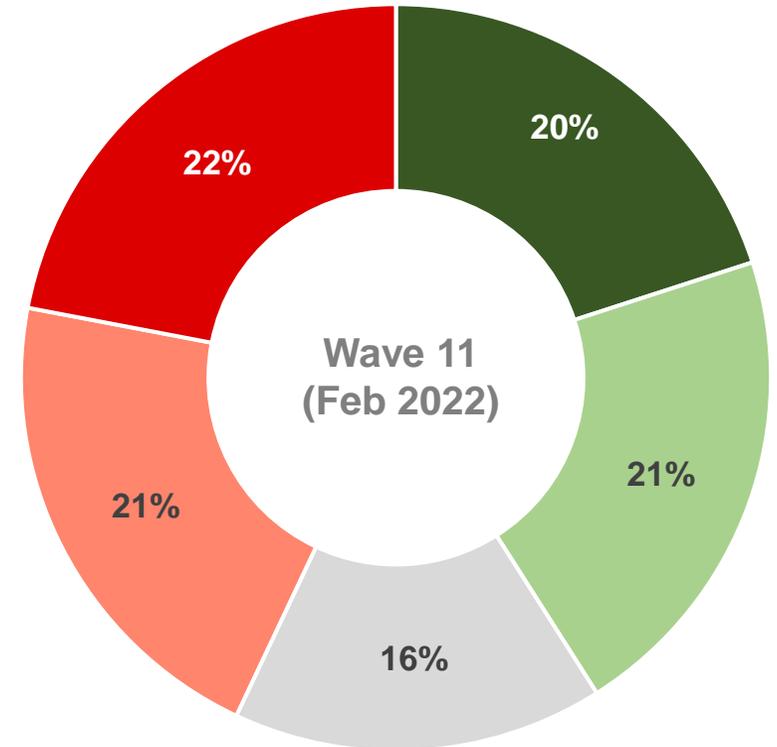
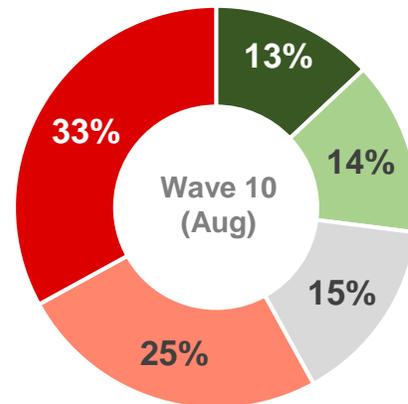
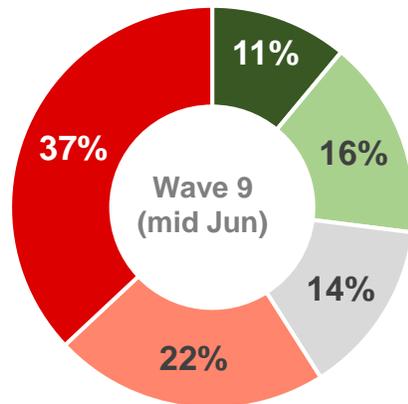
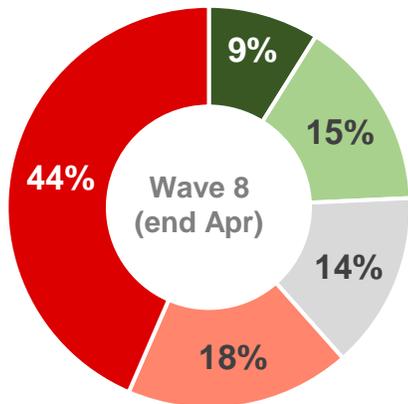
What should we say?

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Although significantly lower than in summer 2021, there remains over 40% of the attractions-visiting market who disagree that all Covid-19 safety measures should be removed

Agreement that:
“The time has come to remove all Covid-19 safety measures used by visitor attractions”



Who are more likely to agree (41% overall)?

Young: 16-34s (48%), 35-54s (40%), 55+ (33%)

Families: Children in household (46%)

Region: London (43%), South (36%), Mids (44%), North (48%), Wal (34%), Scot (35%), N.Ire (43%)

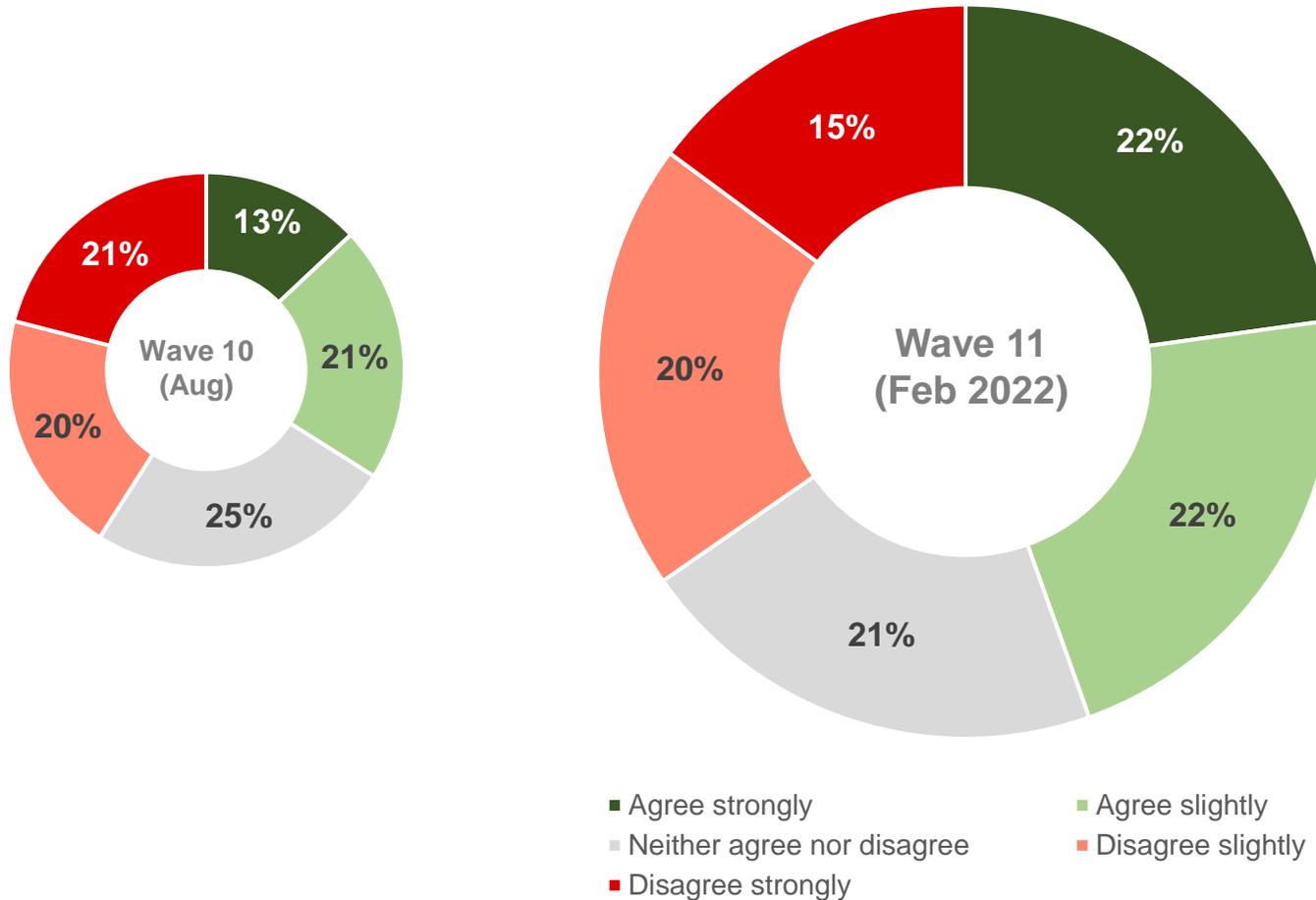
- Agree strongly
- Agree slightly
- Neither agree nor disagree
- Disagree slightly
- Disagree strongly

Q: How much do you agree or disagree with the following statement: “The time has come to remove all Covid-19 safety measures used by visitor attractions”

Base: All respondents (Wave 8-1,066, Wave 9-884, Wave 10-906, Wave 11-1,056)

Similarly, there is around a third of the audience who believe that these safety measures should still be mandatory

Agreement that:
“I am pleased that visitor attractions are now allowed to remove their Covid-19 safety measures ”

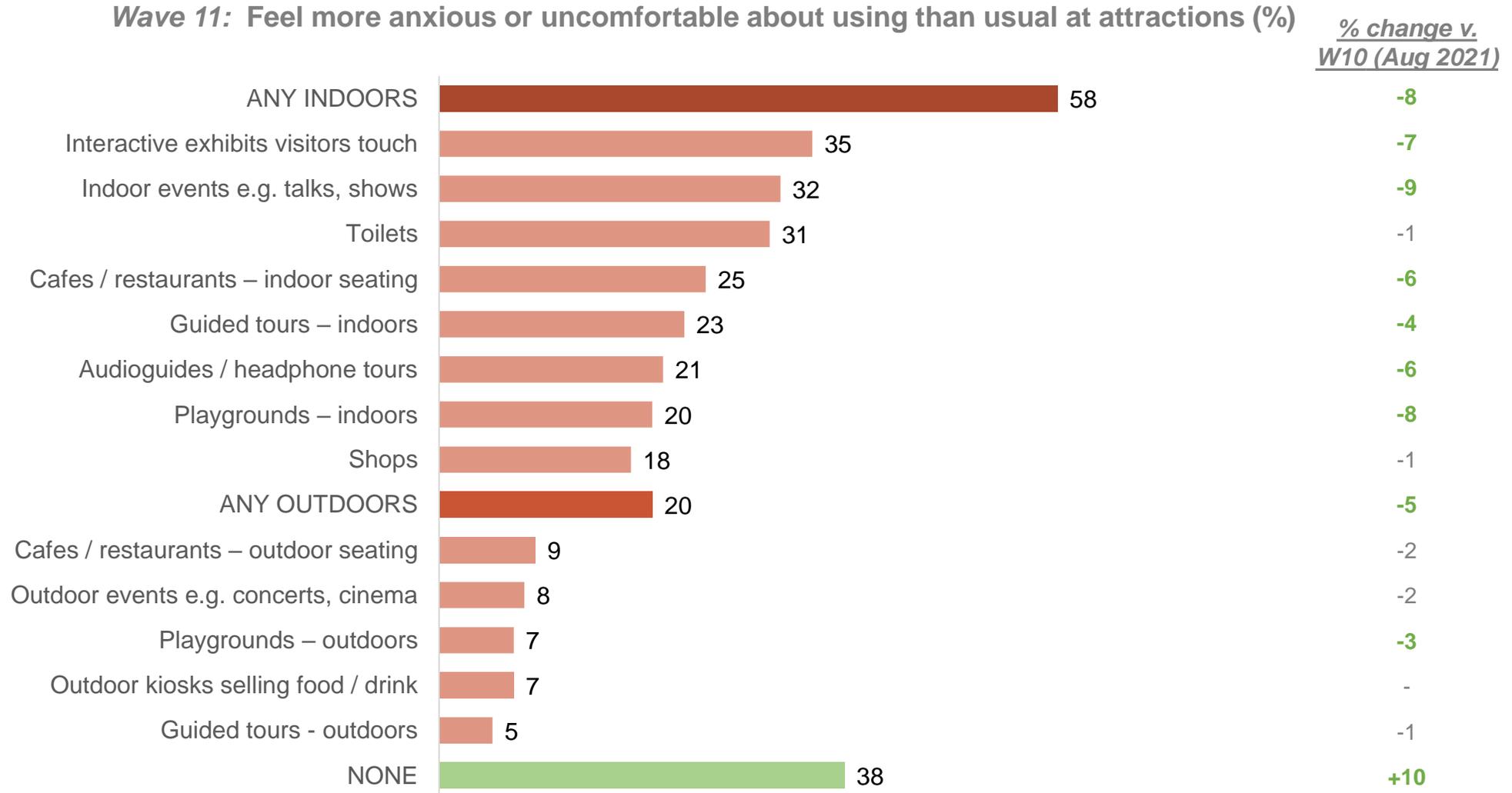


Who are more likely to agree (44% overall)?

Young: 16-34s (50%), 35-54s (42%), 55+ (38%)

Region: London (43%), South (40%), Mids (47%), North (49%), Wal (34%), Scot (42%), N.Ire (43%)

Two-thirds still feel less comfortable than pre-Covid about an aspect of visiting an attraction. This supports the continued presence of at least some safety measures

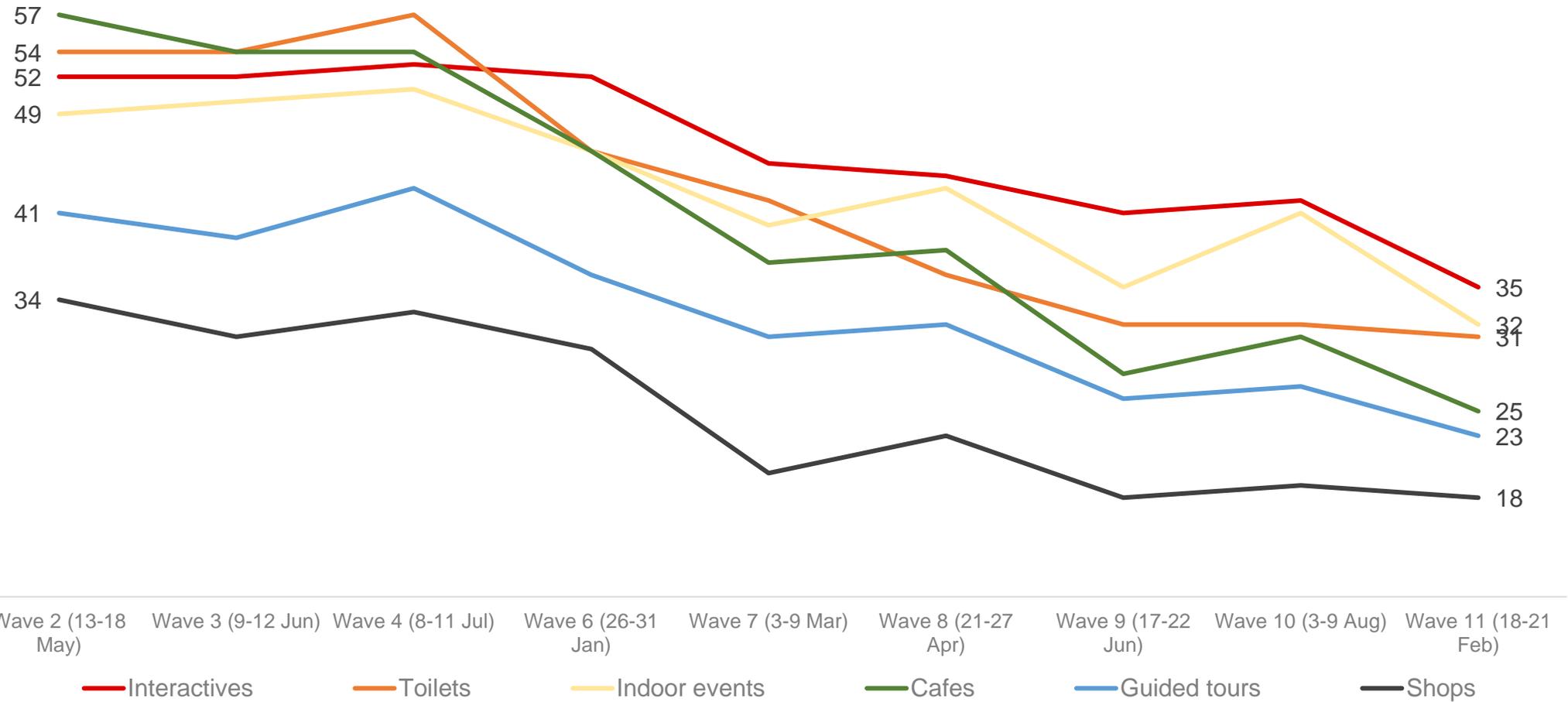


Q: At visitor attractions, which of these, if any, would / do you still feel more anxious or uncomfortable about using than before the Coronavirus pandemic?

Base: All respondents, Wave 11 (n=1,056)

However, this anxiety is now well below levels observed during 2020 and 2021

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

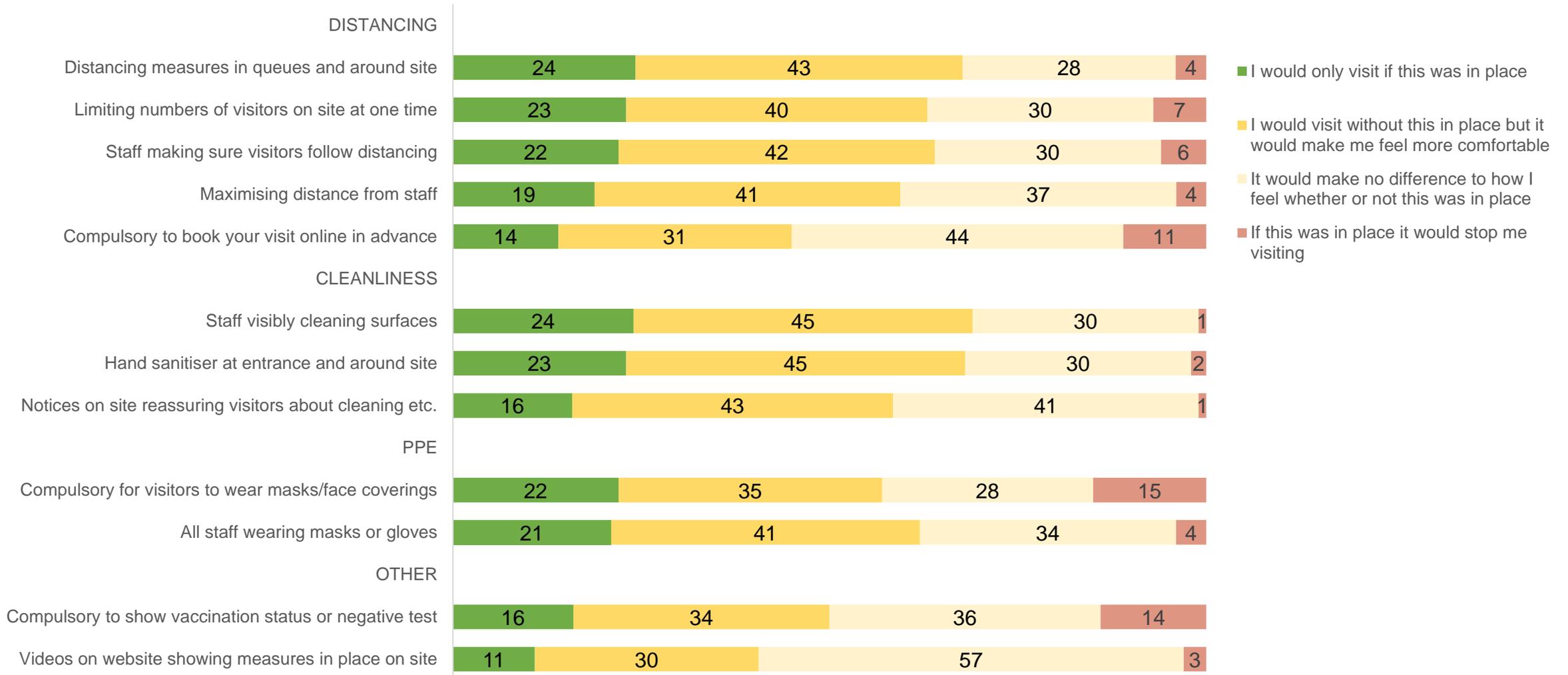


Q: At visitor attractions, which of these, if any, would / do you still feel more anxious or uncomfortable about using than before the Coronavirus pandemic?

Base: All respondents

There is still around a quarter of the audience who claim that they wouldn't visit without the presence of at least some cleanliness or distancing measures. However, there is now notable push back on pre-booking, mask wearing and vaccination status

Wave 11: Impact of measures on visiting attractions in near future (%)



Q: Thinking about visiting attractions generally in the near future, for each of these measures that may be in place, which of these statements applies to you?

Base: All respondents – Wave 11 (1,056)

Almost as many now see pre-booking as a barrier to visiting as see pre-booking as a necessary reassurance for visiting. Encouraging pre-booking generally or perhaps compulsory pre-booking during busy periods now appears a more sustainable strategy than blanket compulsory pre-booking

Pre-booking a condition of visiting (14%)

Happy to get out and about and to do things again, also because some places like to keep the 'booking time slots' or reduced capacities, it means these places aren't as busy whenever we do go so we can enjoy it more

I am quite happy to visit outdoor attractions such as gardens but would prefer a timed ticket to indoor attractions.

Happy if numbers limited and booking in advance available.

I feel fine about visiting attractions in the near future so long as the numbers are limited.

Pre-booking a barrier to visiting (11%)

I would like to go back to visiting attractions without having to book in advance a lot of our trips previously were on a spur of the moment basis

I want to. But don't want to make an appointment nor wear a face covering inside it should be a reprieve from The hell of modern life

Although almost a quarter claim that compulsory mask wearing for visitors would be a precondition of visiting, 15% claim that it would prevent them visiting

Mask wearing a condition of visiting (22%)

Wary- until people start protecting each other. I am not prepared to live without masks or distancing until coronavirus is gone- the 24th fills me with dread. Will I ever feel safe again

As long as people are wearing face masks happy

Feel it is safe to do so following precautions. I would wear a mask indoors,

Risk is still too high and wouldn't feel safe if people weren't wearing a mask

I would visit one with appropriate safety measures in place. I would expect masks to be required if indoors.

Mask wearing a barrier to visiting (15%)

I would like to visit them as before but if the venue is insisting people walk around wearing stupid face masks then I will not visit

I want to. But don't want to make an appointment nor wear a face covering inside it should be a reprieve from the hell of modern life

It's not going to be the same as it was before for some time yet, but as all restrictions are lifted, and seeing people wearing face masks when out and about lessens, I might start to feel more comfortable about going back to such places.



Key take-outs

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Key take-outs *(Wave 11: 18-21 February 2022)*

There are now only small minorities – around 10% for indoor attractions - whose anxiety is strong enough to prevent them from visiting an attraction, which represents a very strong shift in positivity since summer 2021. There is now an overriding sense that the time has come to return to visiting attractions

However, ongoing visit nervousness is still apparent, with around 40% still expressing concerns about visiting attractions – mainly centring upon a continued anxiety about crowds

Many caveat a desire to return with a need (and sometimes, expectation) for some safety measures to be retained. Indeed, there remains over 40% of the market who disagree that all Covid-19 safety measures should be removed

However, there is a growing proportion of the audience who are pushing back against some of the more onerous measures – pre-booking, mask wearing and proof of vaccination status - to the extent that they are a visit barrier

In particular, general encouragement of pre-booking or perhaps compulsory pre-booking during busy periods now appears a more sustainable strategy than blanket compulsory pre-booking

It feels like the market still needs the ‘safety blanket’ of some overt Covid measures, even if these are primarily signals to demonstrate that an attraction has the best interests of its visitors at heart, and messaging around respecting fellow visitors

In deciding upon measures to retain and remove, we perhaps now need to change the question from ‘which measures keep our visitors safest?’ to ‘which measures least impact upon the experience?’

Cautious but optimistic. We are going to have to live with Coronavirus, and I believe we're all going to get it eventually. However, I would still like to see minimal, common-sense precautions like masks and sanitiser being retained in enclosed areas.

Contact

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Questionnaire: Wave 11 (18-21 Feb 2022)



ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE – WAVE 11

SAMPLE DEFINITION:

- Adults aged 18 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 in the near future. 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 feel about visiting attractions in the near future. Please give as much detail as possible.
OPEN RESPONSE

Q2a. Which one of these best describes your attitude towards visiting each of these types of attraction in the near future? **RANDOMISE ORDER**
I am / would be comfortable visiting, I am / would be anxious but would probably visit, I am / would be anxious and would not visit, I don't tend to visit this type of attraction anyway

Q2b. Which one of these best describes your attitude towards visiting each of these types of venue in the near future? **RANDOMISE ORDER**
I am / would be comfortable visiting, I am / would be anxious but would probably visit, I am / would be anxious and would not visit, I don't tend to visit this type of venue anyway

LIST OF ATTRACTIONS FOR Q2A:
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 Q2B:
Theatres
Music concerts (indoors)
Music concerts / festivals (outdoors)

Q3. Thinking about visiting attractions generally in the near future, for each of these measures that may be in place, which of these statements applies to you?
I would only visit if this was in place, I would visit without this in place but it would make me feel more comfortable, it would make no difference to how I feel whether or not this was in place, if this was in place it would stop me visiting

- 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 face coverings
- 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
- Staff making sure that visitors follow social distancing measures
- Compulsory to book your visit online in advance
- Compulsory to show vaccination status or negative test

Q4. At visitor attractions, which of these, if any, would / do you still feel more anxious or uncomfortable about using than before the Coronavirus pandemic? **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
- Interactive exhibits that visitors touch in some way
- Other (please tell us what _____)
- None

Q5. How much do you agree or disagree with the following statements? **DO NOT ROTATE**
The time has come to remove all Covid-19 safety measures used by visitor attractions
I am pleased that visitor attractions are now allowed to remove their Covid-19 safety measures
Agree strongly, Agree slightly, Neither agree nor disagree, Disagree slightly, Disagree strongly

Q6. Before the Coronavirus outbreak, there may have been some visitor attractions that you travelled to by public transport. How do you feel about using each of these types of public transport to travel to visitor attractions in the near future? **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

DEMOGRAPHICS COLLECTED:

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