

ALVA Attractions Recovery Tracker

Wave 1

Fieldwork: 20-24 April 2020

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The challenge

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

Helping us to get back on our feet quickly but also to sustain our recovery

Two major practical questions attractions likely to have ahead of re-opening:

- How should we physically present ourselves on re-opening to build public trust and confidence in visiting?
- What communications messages should we put out there to build confidence and capture the public mood?



How are we generating insights to meet this challenge?

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

“UK adults who visited at least one attraction in the UK in 2019”

Wave 1: 20-24 April

668 survey responses

Public attitudes likely to evolve, so intend to run periodically as re-opening nears and in the period after re-opening as public reacts to the reality of new visiting environments



How is the public feeling about visiting attractions?

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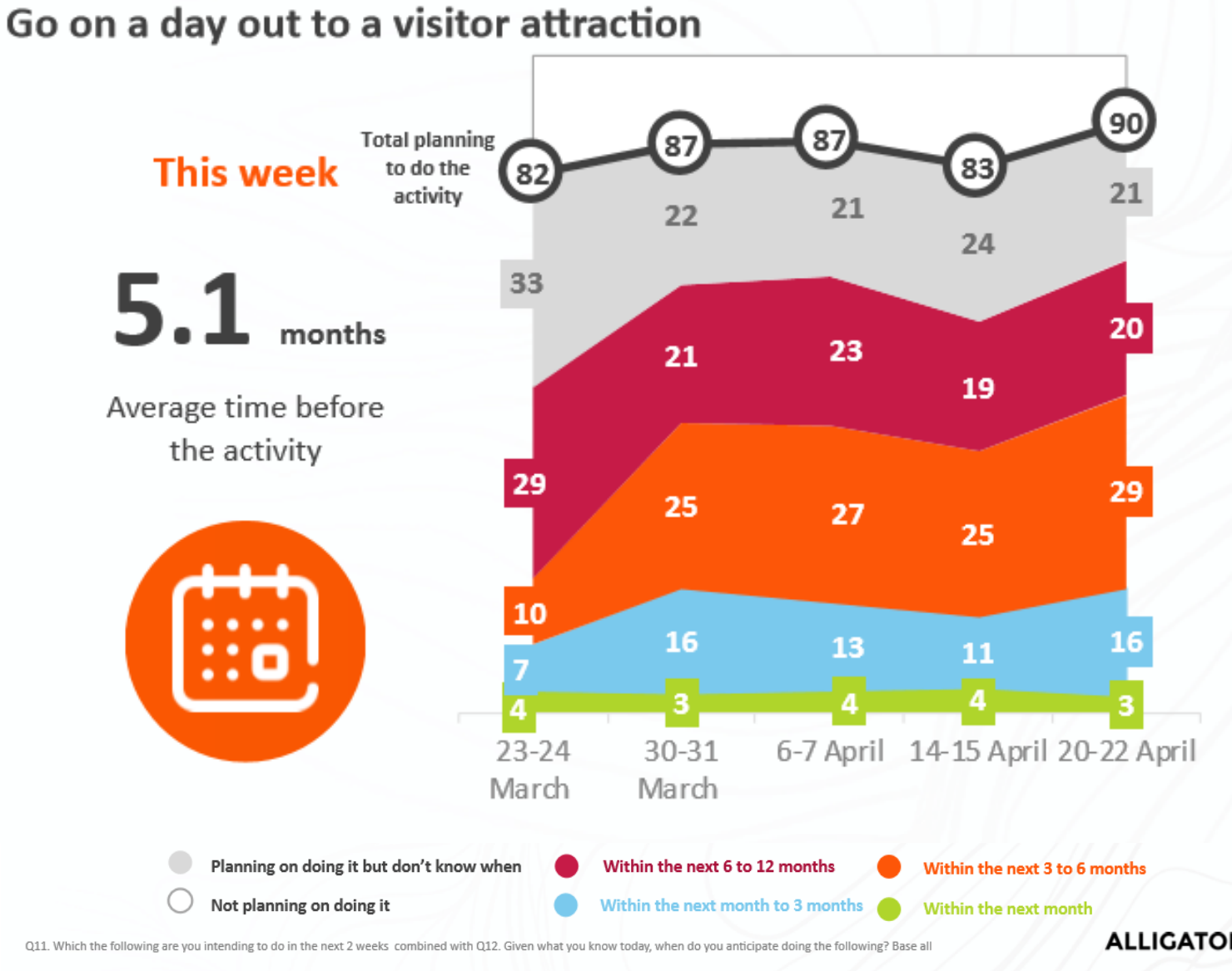
BVA-BDRC tracker indicates a growing anticipation of visiting attractions within the next 3-6 months, perhaps a reaction to horizons for overseas travel becoming further away



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I hope to visit a lot more places when we come out of lockdown. Not too keen on going abroad yet but would be keen to see more places around the UK. I'd still keep my distance but if I felt it was safe I'd go for it.

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Market is highly cautious overall, but a quick return is more likely for gardens and country parks. But confidence is not as simple as outdoors versus indoors

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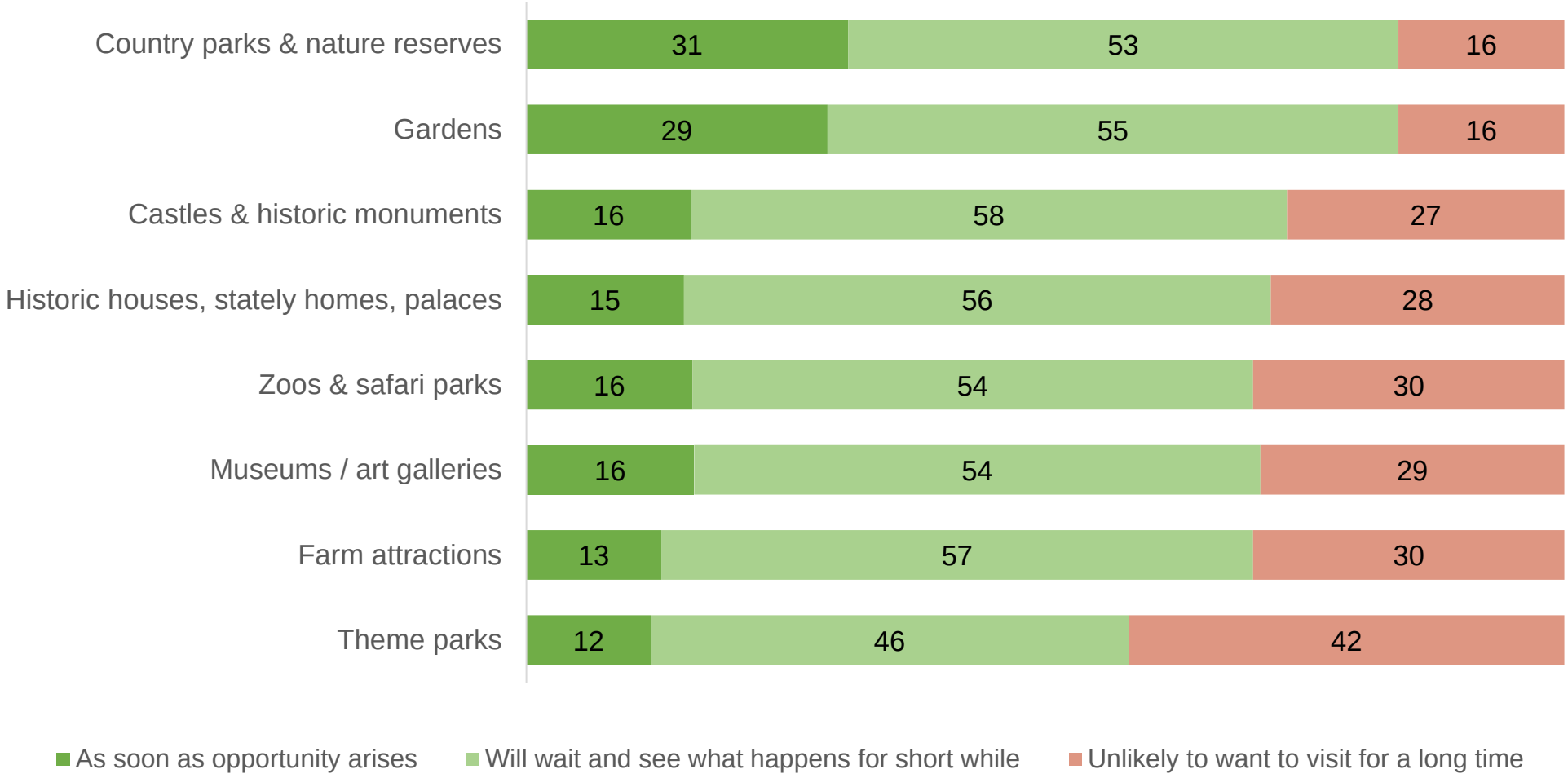
HOW SOON do you think it will be before you visit each of these types of attraction after they re-open (%)



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: Museums/art galleries (570), Historic houses etc. (550), Castles & monuments (598), Zoos/safari parks (518), Gardens (586), Theme parks (425), Country parks & nature reserves (619), Farms (441)

Perceptions of crowds and whether an attraction is **able to maintain social distancing** is the current key determinant of a quick return

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Fear of crowds, overcrowding, too many visitors, too busy (18%)

I will be wary of how they will manage the large crowds and what restrictions have been put in place - I will take into account their health and safety plans

It will be difficult with hoards of foreign tourists flooding through the doors and so I'll probably leave visiting this year

I'll be too worried to visit crowded places so I would hope they have a limit on numbers

I would not visit for a while as I fear people will flock to them once the lock down is lifted and they will be unsafe

I am worried that everyone will rush out all at the same time after being cooped up for so long. I hope to be able to go to as many places as possible.

Concern over / mention of need for social distancing (12%)

I would need to be 100% sure that I could maintain social distancing and that they would not be crowded and if visitors didn't follow social distancing that staff would do something about it.

I have no worries about visiting as long as we continue to operate the 2 metre rule for a while longer.

I would love grounds to open so that people can walk but respecting social distancing. I would be wary when I do go fjto attractions and would hope that you can book times and that they are not overly busy or crowded

Will only go to quiet, less busy places like gardens, country parks (4%)

I would really like outdoor attractions to open again, I think this would support mental wellbeing and the local economy. I think there are ways to do this safely by improving hand washing facilities, limiting numbers (perhaps pre booking only), regular cleaning etc. I think attractions that cannot open safely e.g. theme parks should remain shut for the foreseeable future but I see no reason not to open attractions with gardens at the same time as shops.

I am looking forward to visiting a country park when they re-open but I am not planning to visit any other types of attractions at the moment as the risk of getting too close to other people and catching COVID-19 is still there

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 (668)

Many potential visitors are adopting a *'wait and see'* approach in fear of a second wave of the virus

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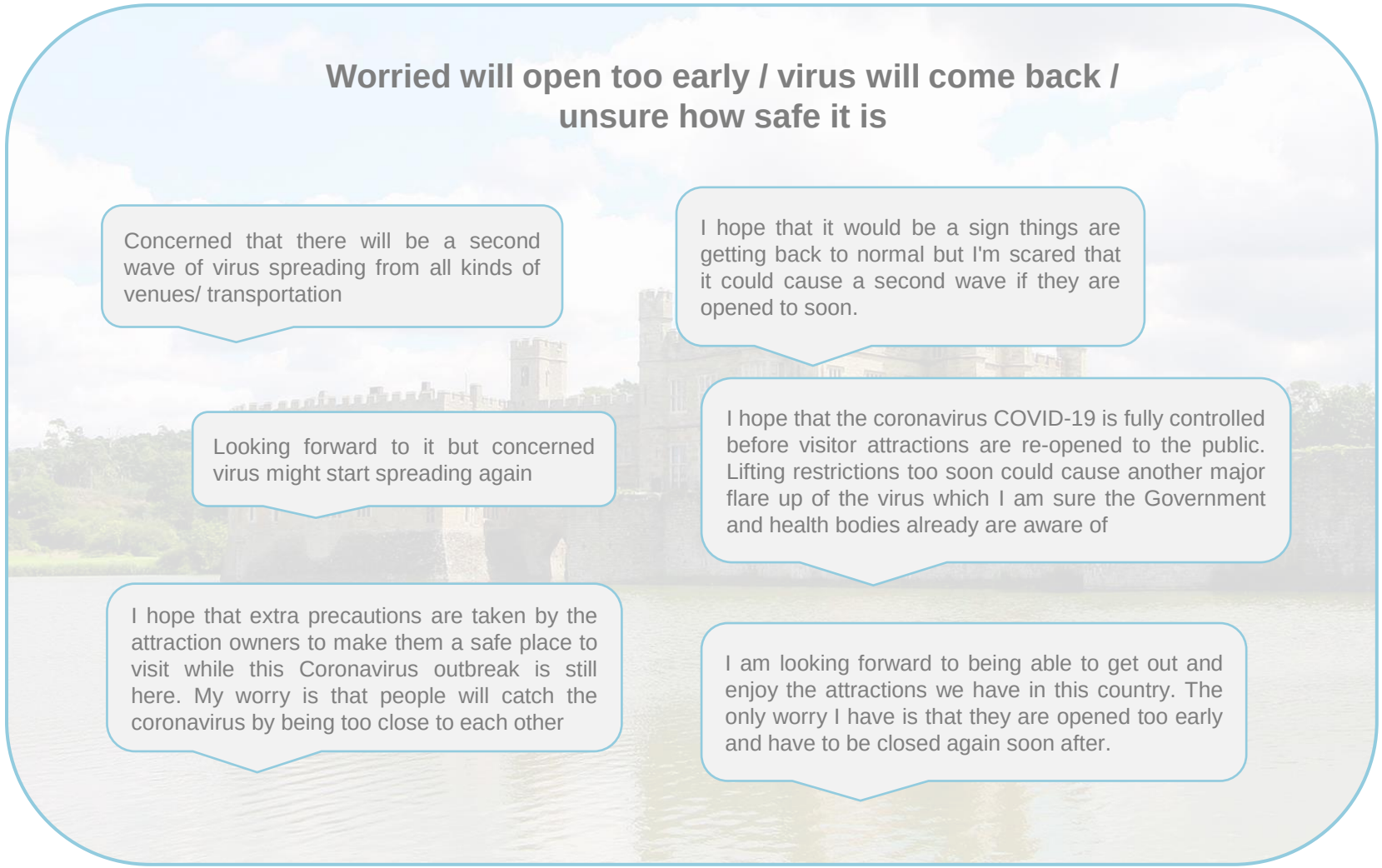


Q: Please tell us in your own words how you currently feel about visiting attractions once they re-open to the public. What are your hopes? What are your worries or anxieties?

Base: All respondents (668)

A significant proportion of attraction visitors are currently feeling that they will not return until a vaccine is available or the virus at least appears to be comprehensively beaten

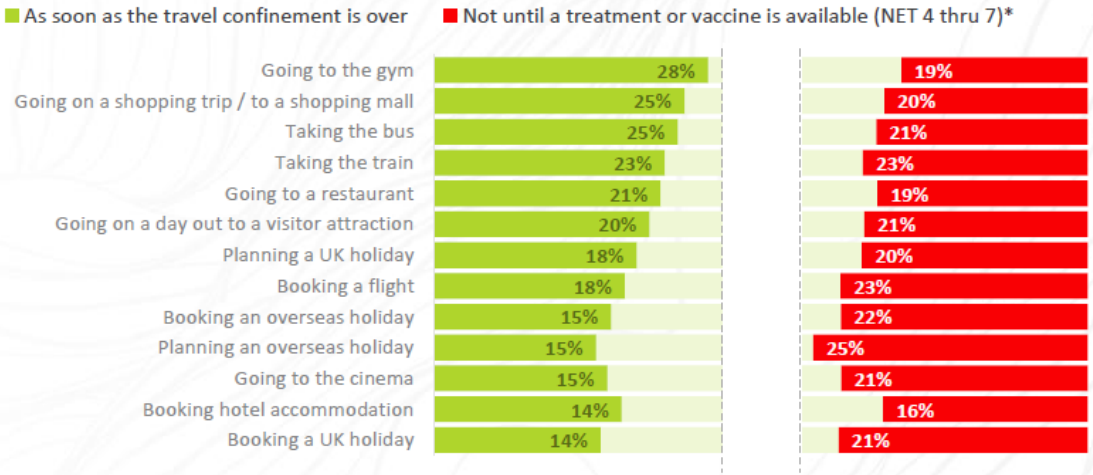
At what stage would you feel comfortable doing the following again?

65% Would be comfortable doing **all** the activities they plan to do *within months* of the confinement ending, assuming no second wave

11% Would not be comfortable doing any activity planned until a treatment or vaccine exists

4% Would not be comfortable doing any activity planned until they and their family have been vaccinated

1	As soon as the travel confinement is over
2	Not until a few weeks after the confinement is over, assuming no second wave ensues
3	Not until a few months after the confinement is over, assuming no second wave ensues
4	Not until a proven hospital treatment for COVID 19 symptoms is found
5	Not until a vaccine for the coronavirus is discovered
6	Not until a significant proportion of the population has been vaccinated
7	Not until my family and I have been vaccinated



Source: BVA-BDRC COVID 19 Tracker – Wave 4 (14-15 April)

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Mention of vaccine, no deaths, beaten virus (7%)

> Will wait until absolutely sure that the threat has completely gone. Not prepared to risk myself in any way after all this time

> I would be wary of going anywhere until the pandemic was well and truly proven it was over

> I am very worried about visiting any public location until I am absolutely sure the virus is beaten and a vaccine is available

> I will not be safe until the vaccine has been created.

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 (668)

Caution is widespread, but there are some groups who are more likely to return as soon as the opportunity arises

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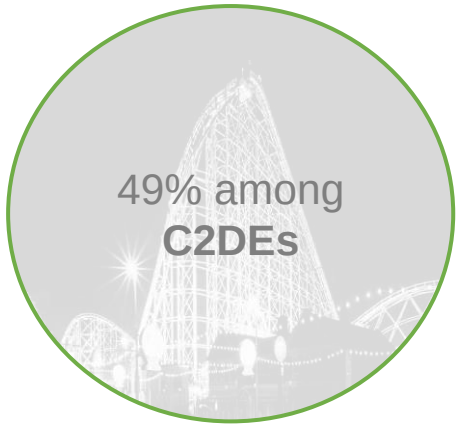
41% of the market will visit at least one attraction type ‘AS SOON AS THE OPPORTUNITY ARISES’ after re-opening







Q: Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open?
Bases: All respondents (668)

At the other end of the scale, there are some groups who currently feel that it will be a long time before they visit certain types of attraction

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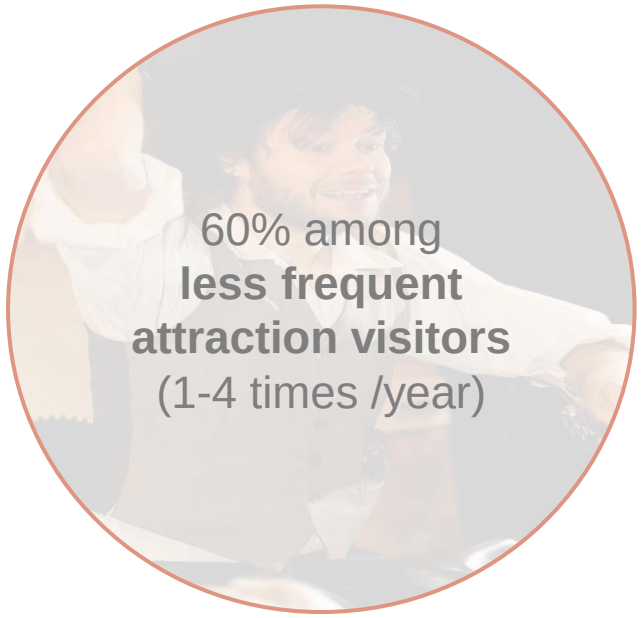
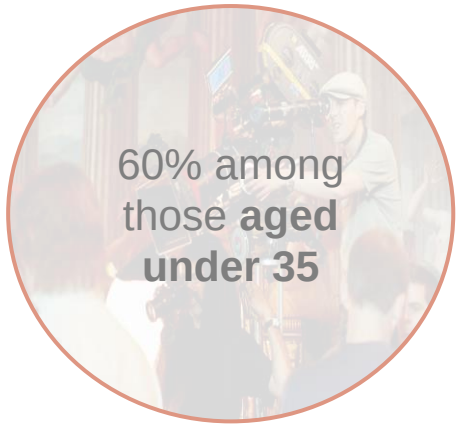
55% of the market feel there is at least one attraction type they are 'UNLIKELY TO WANT TO VISIT FOR A LONG TIME' after re-opening







Q: Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open?
Bases: All respondents (668)

Around two-thirds of the market will feel increased anxiety about a visit, so reassurance before and during a visit will be critical. Anxiety appears to be less related to the type of attraction

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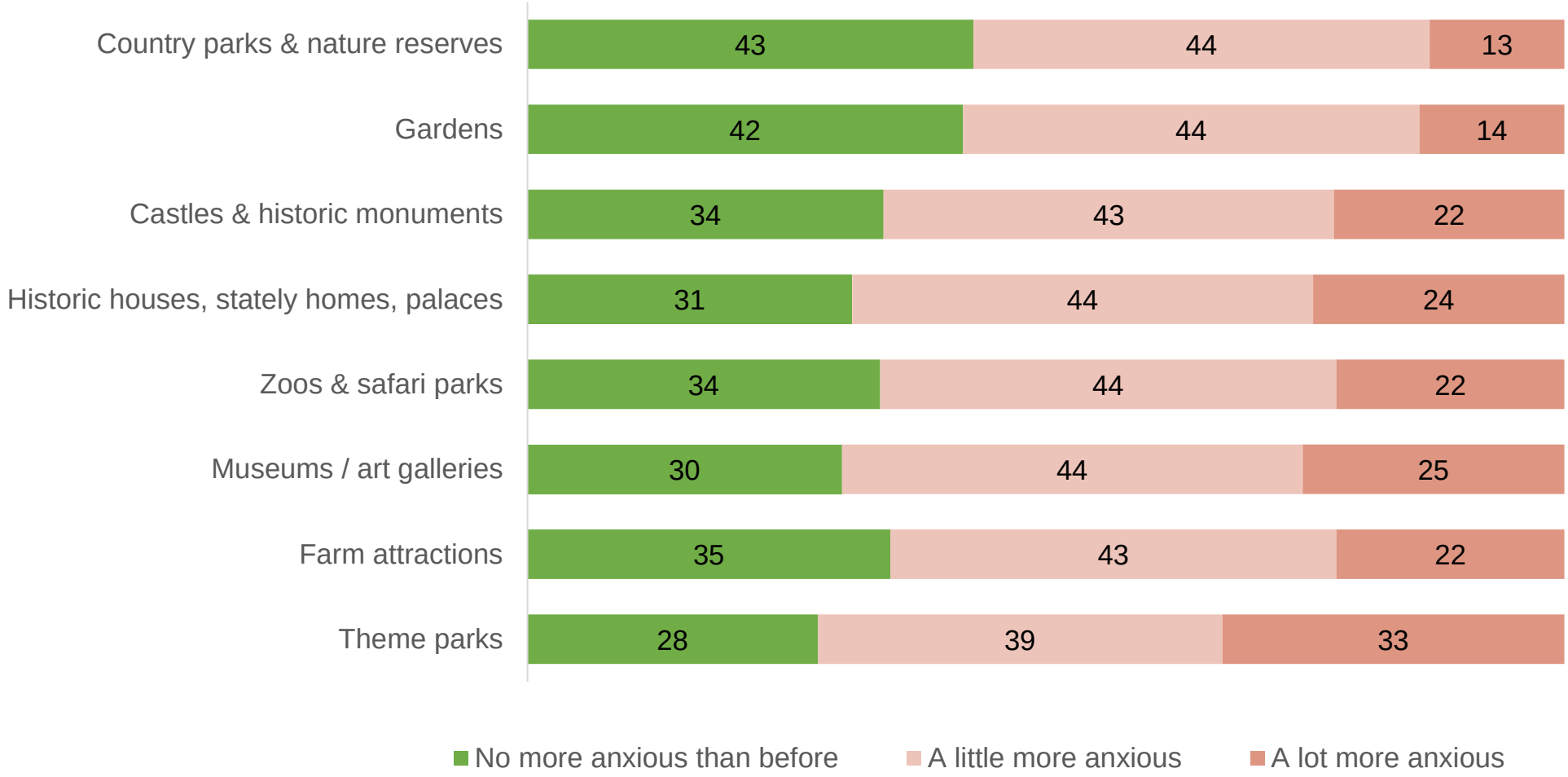
How much more ANXIOUS will you feel about visiting each of these types of attraction after they re-open (%)

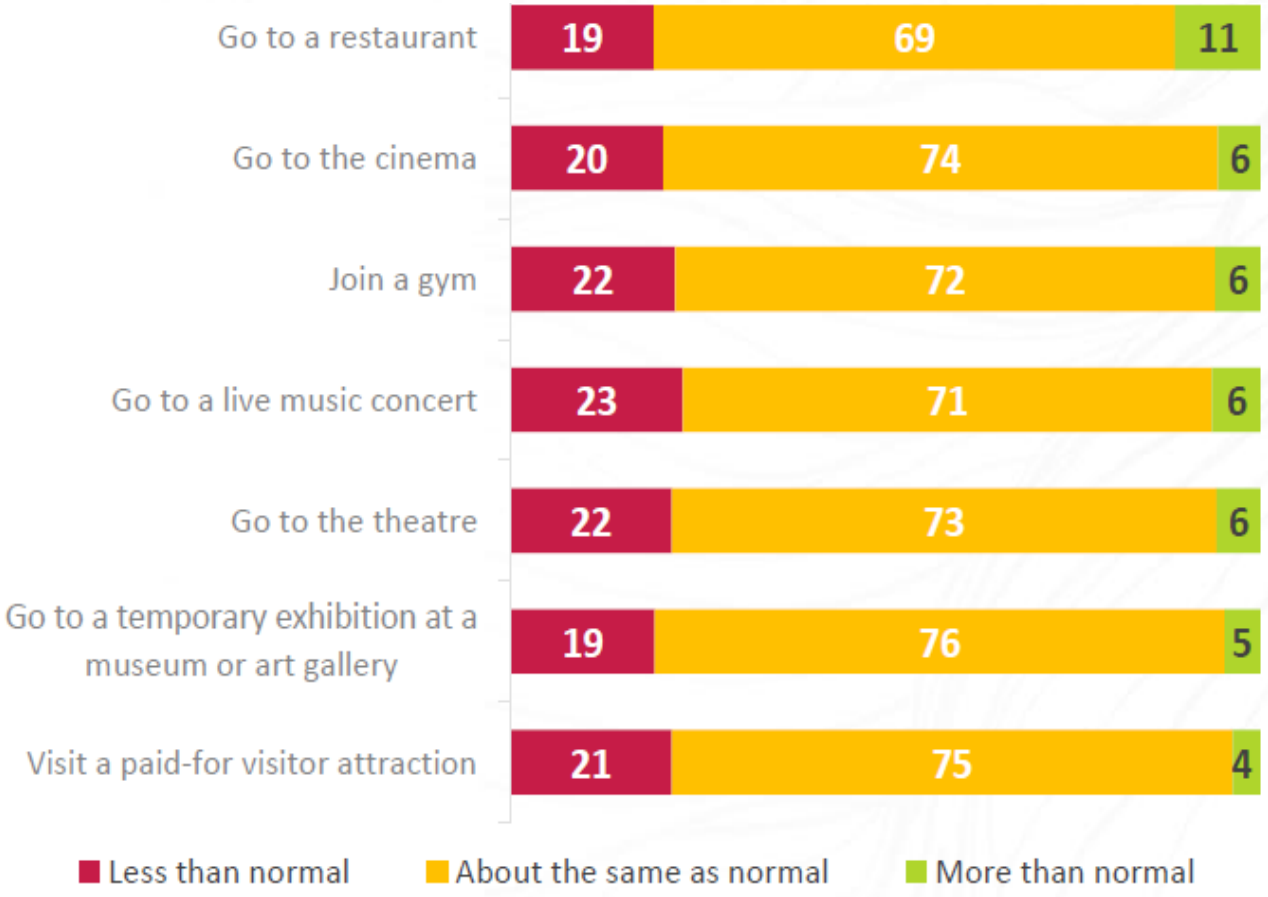


Q: And how much more anxious do you think you will feel about visiting each of these types of attraction after they re-open?

Bases: All who tend to visit this type of attraction: Museums/art galleries (570), Historic houses etc. (550), Castles & monuments (598), Zoos/safari parks (518), Gardens (586), Theme parks (425), Country parks & nature reserves (619), Farms (441)

BVA-BDRC tracker suggests that the market intends to 'pay' less than normal to visit attractions after lockdown. But this probably reflects 'overall spend' on visiting attractions rather than any expectations around admission charges or donations

Q12br Thinking ahead to when you are able to do these activities again how much more or less than normal would you pay to do them? By 'normal' we mean 'before the lockdown started in the UK'



Base: BVA-BDRC COVID 19 Tracker – Wave 4 (14-15 April)

In fact, there is evidence of some increased altruism in the market. This may be aspirational, but visitors not expecting blanket price discounting

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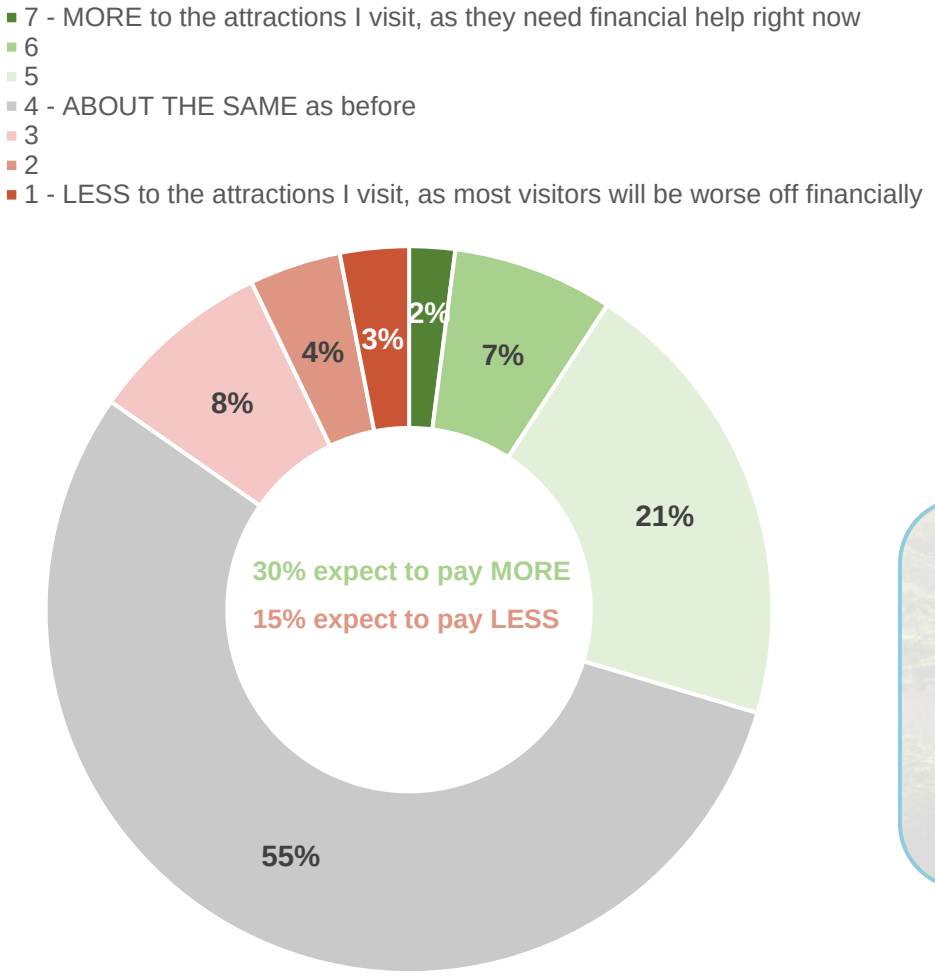
When attractions re-open, what is your opinion of how much you would expect to pay for or donate to the attractions you visit compared to before the Coronavirus outbreak?



I am looking forward to going out and about to attractions when they open, think it's important to give them my custom following their re-opening

Can't wait to support these industries and national assets.

I do hope that they can re-open soon as the zoos especially rely on gate money to feed and look after the animals

I hope that they survive to open, I'm worried that many charities will be unable to cope and fold

Clues on pricing or donor targets

1. **'Members' feeling particularly altruistic right now:** *42% expect to pay / donate more*
2. **Altruism highest among young people:** *39% of 16-34s, 25% of 35-54s and 25% of 55+ expect to pay / donate more*
3. **And also higher among families:** *38% expect to pay / donate more*
4. **Zoo visitors most altruistic:** *46% of frequent zoo visitors expect to pay / donate more*

Q: When attractions re-open, what is your opinion of how much you would expect to pay for or donate to the attractions you visit compared to before the Coronavirus outbreak?
Base: All respondents (668)



How can we build trust and confidence in visiting?

What should we do?

What should we say?

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Widespread anxiety around using indoor facilities, particularly those where social distancing is more problematic. Less anxiety outdoors, but still notable

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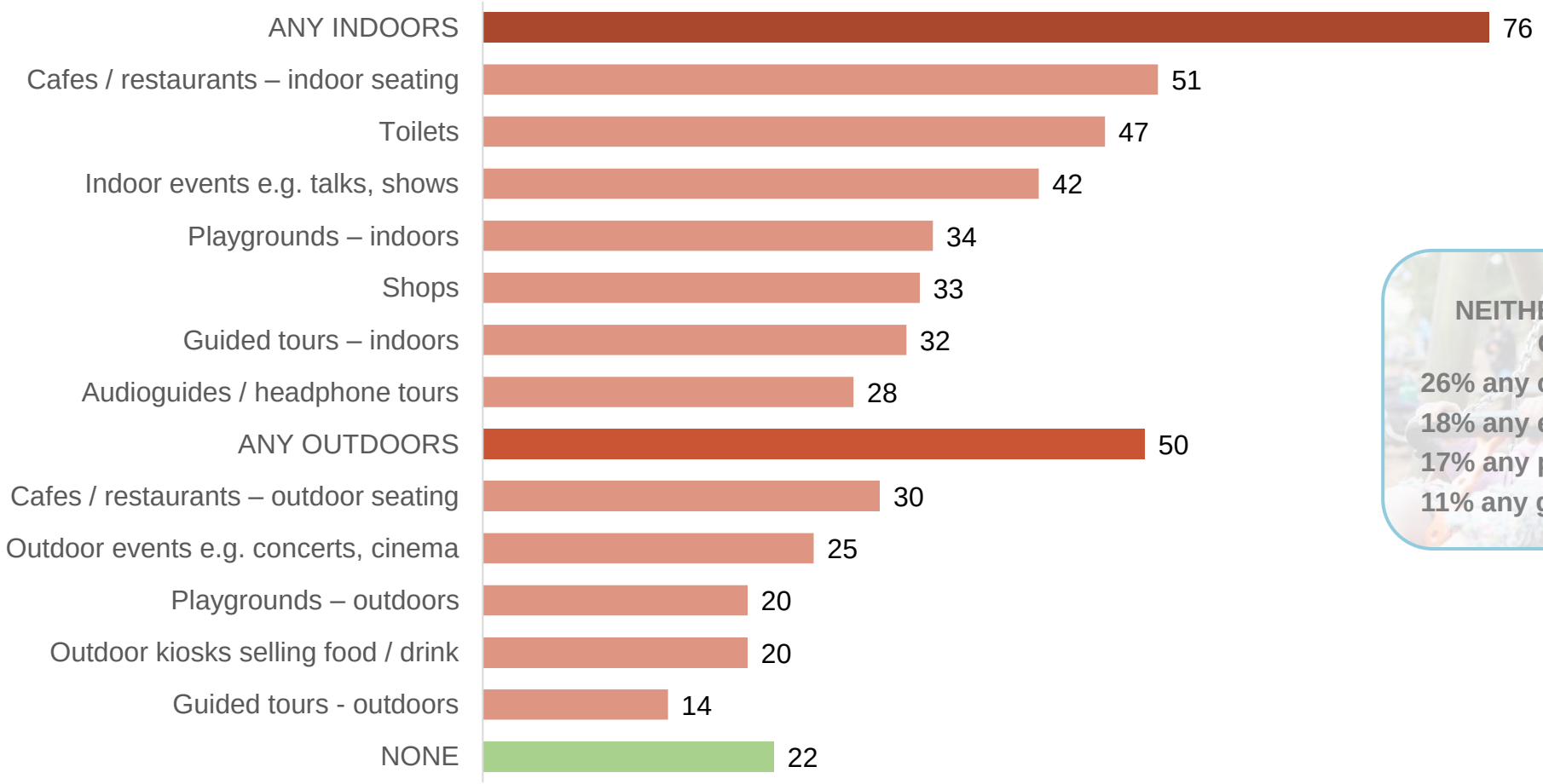
Will feel more anxious or uncomfortable about using than usual at attractions (%)



NEITHER INDOORS NOR OUTDOORS

26% any café / restaurant
18% any events
17% any playground
11% any guided tours

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 (668)

Anxiety increases with age, especially for indoor facilities. Flexibility in switching facilities outside, where feasible, will benefit attractions with an older age profile

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

INDOOR FACILITIES

%	Aged under 35	Aged 35-54	Aged 55 or over
Cafes / restaurants – indoor seating	42	51	61
Indoor events e.g. talks, shows	34	43	51
Shops	27	34	41
Guided tours – indoors	24	29	44
Audioguides / headphone tours	17	30	37

OUTDOOR FACILITIES

%	Aged under 35	Aged 35-54	Aged 55 or over
Cafes / restaurants – outdoor seating	30	32	29
Outdoor events e.g. concert, cinema	28	24	22
Outdoor kiosks selling food / drink	16	21	25
Guided tours – outdoors	12	15	15

I just can't wait to go to the grounds of National Trust properties again. I think we will stick to outdoor activities for a while though and not do the cafes. I doubt they will open at first anyway though.

I hope that attractions can reopen. I would be concerned about social distancing and whether cafe areas had been properly cleaned.

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 (668)

Those with children tend to be more anxious about outdoor and less anxious about indoor facilities, although this is likely to reflect the greater range of outdoor facilities usually used

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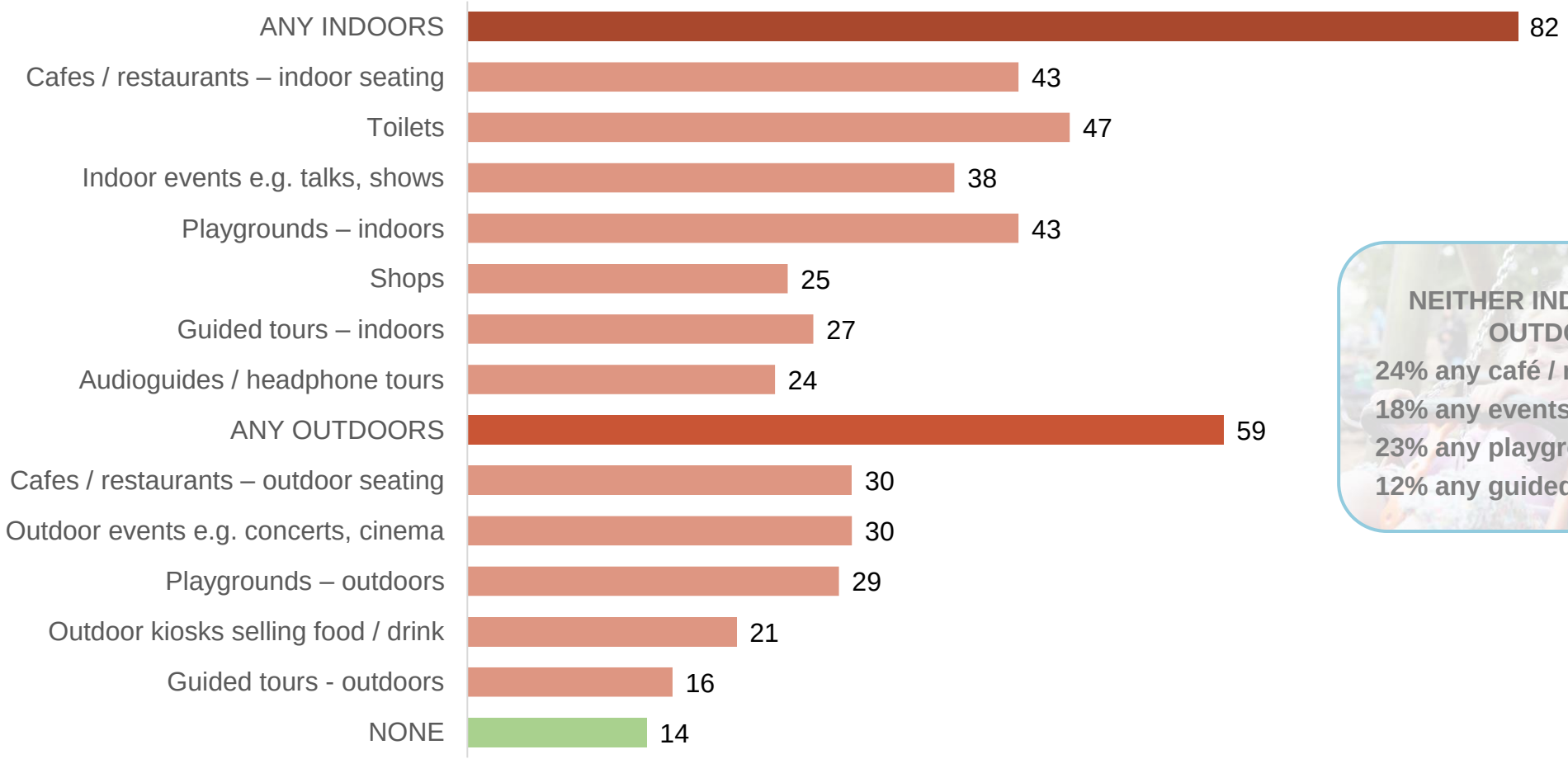
Will feel more anxious or uncomfortable about using than usual at attractions (%)
BASE: All with children aged 0-15 years in their household



NEITHER INDOORS NOR OUTDOORS

24% any café / restaurant
18% any events
23% any playground
12% any guided tours

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 with children aged 0-15 years in household (199)

Distancing and cleanliness measures strongly welcomed by the market, but attractions must be seen to be delivering and policing these effectively – notices alone are not enough. A quarter will feel less comfortable with introducing PPE, especially if compulsory for visitors

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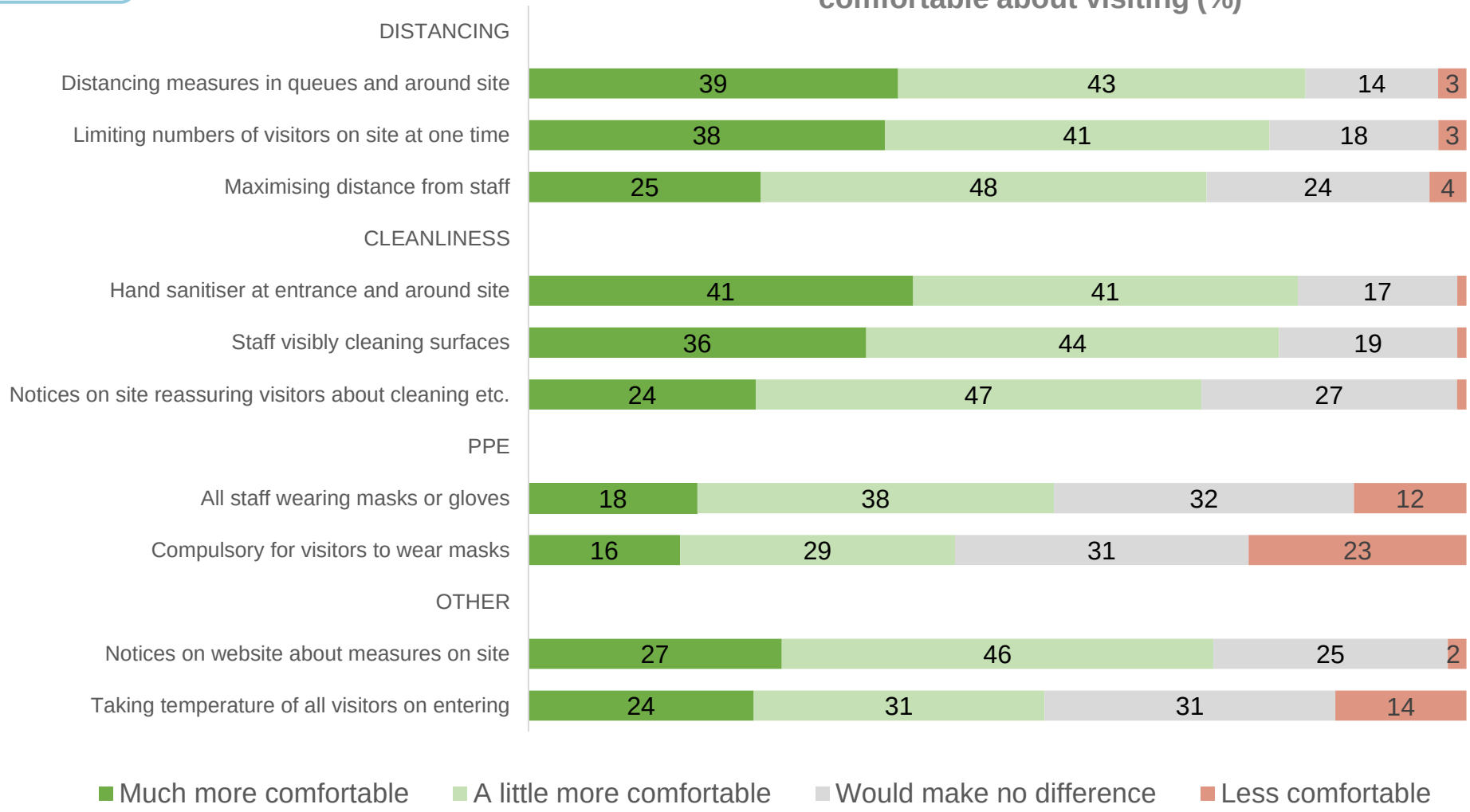
Which of these measures would make you feel more comfortable about visiting (%)



88% more comfortable with a 'distancing' measure

89% more comfortable with a 'cleanliness' measure

61% more comfortable with a 'PPE' measure…..

….but 25% less comfortable

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

Bases: All respondents (668)

Older people tend to be most reassured by measures put in place on site, whether distancing or cleanliness. However, this age group more likely to push back on compulsory visitor masks

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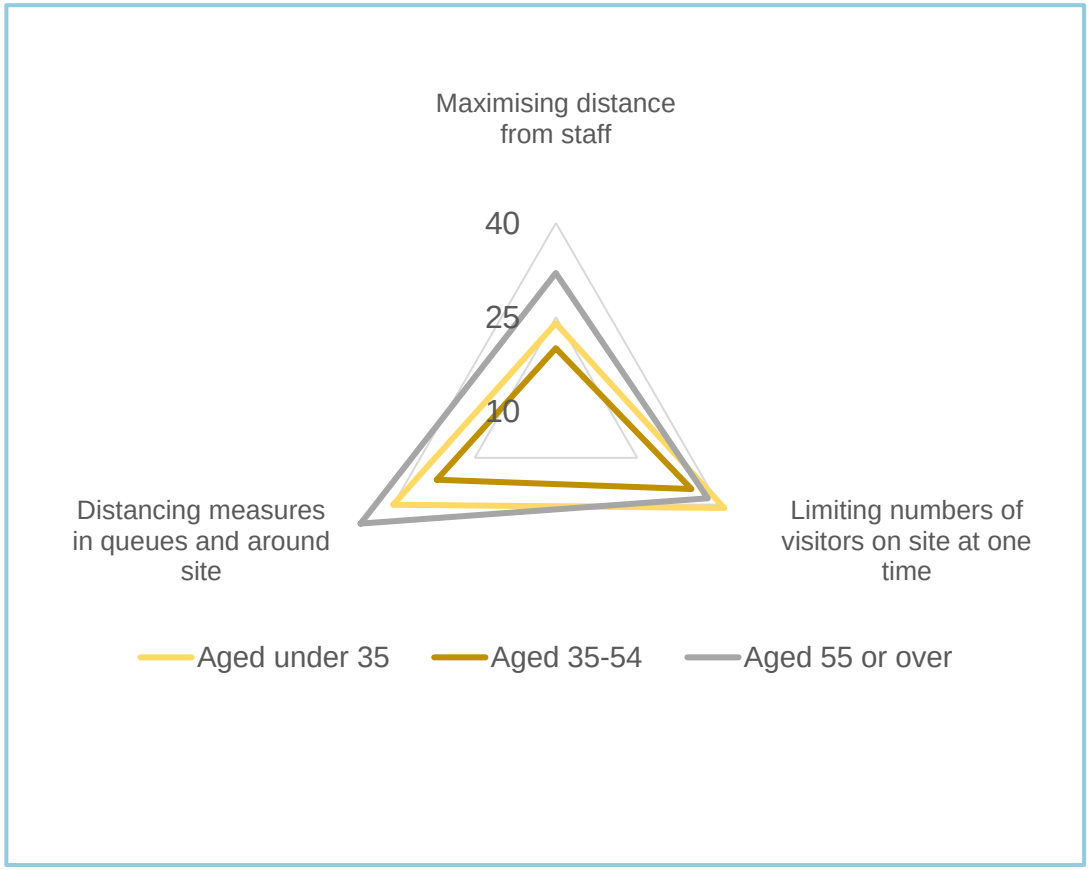
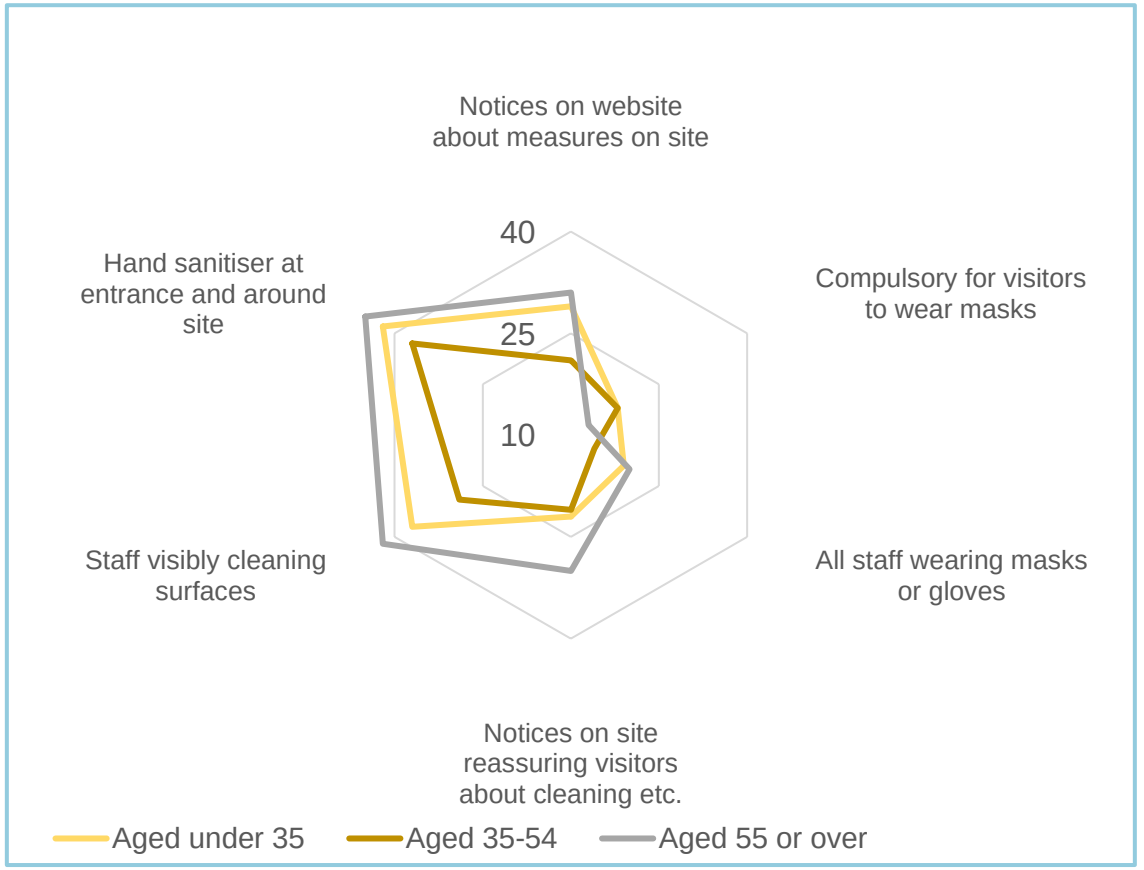
Which of these measures would make you feel MUCH MORE comfortable about visiting (%)

DISTANCING



CLEANLINESS AND PPE



29% of those aged 55 or over feel compulsory visitor masks would make them less comfortable

Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?
Bases: All respondents (668)

Some illustrative quotes on cleanliness and PPE

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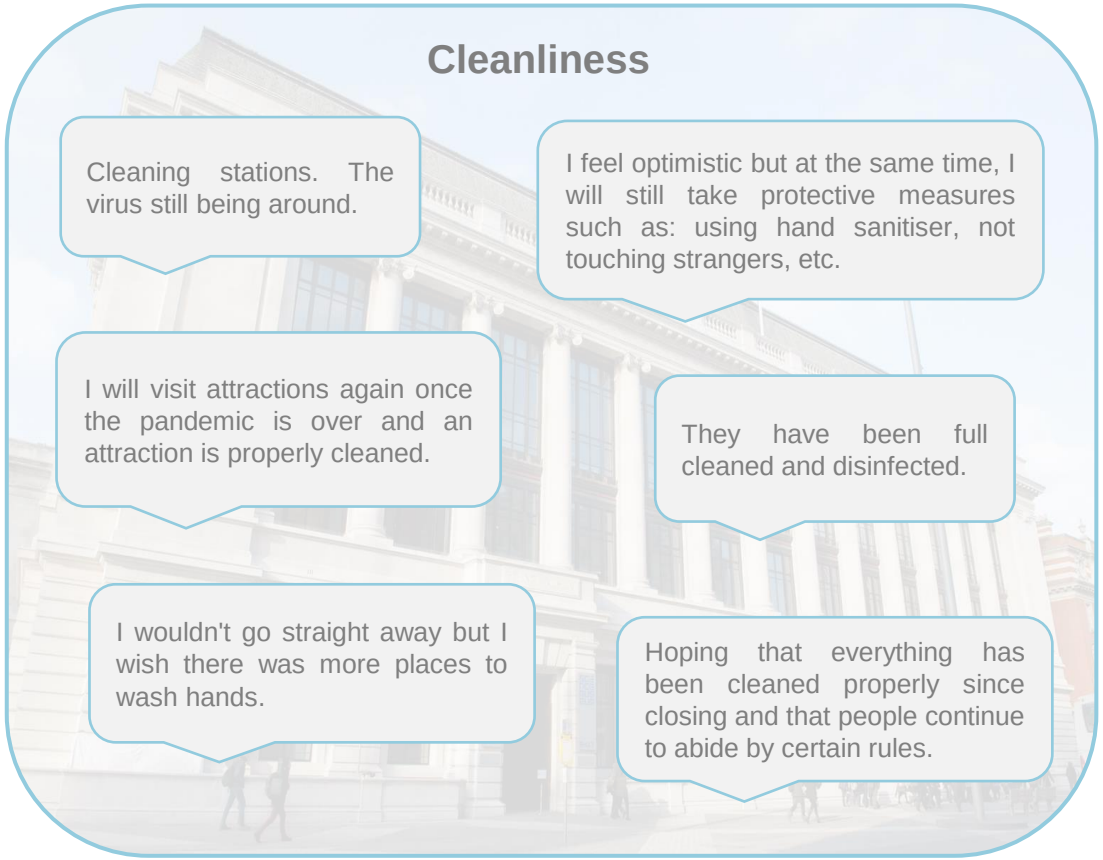

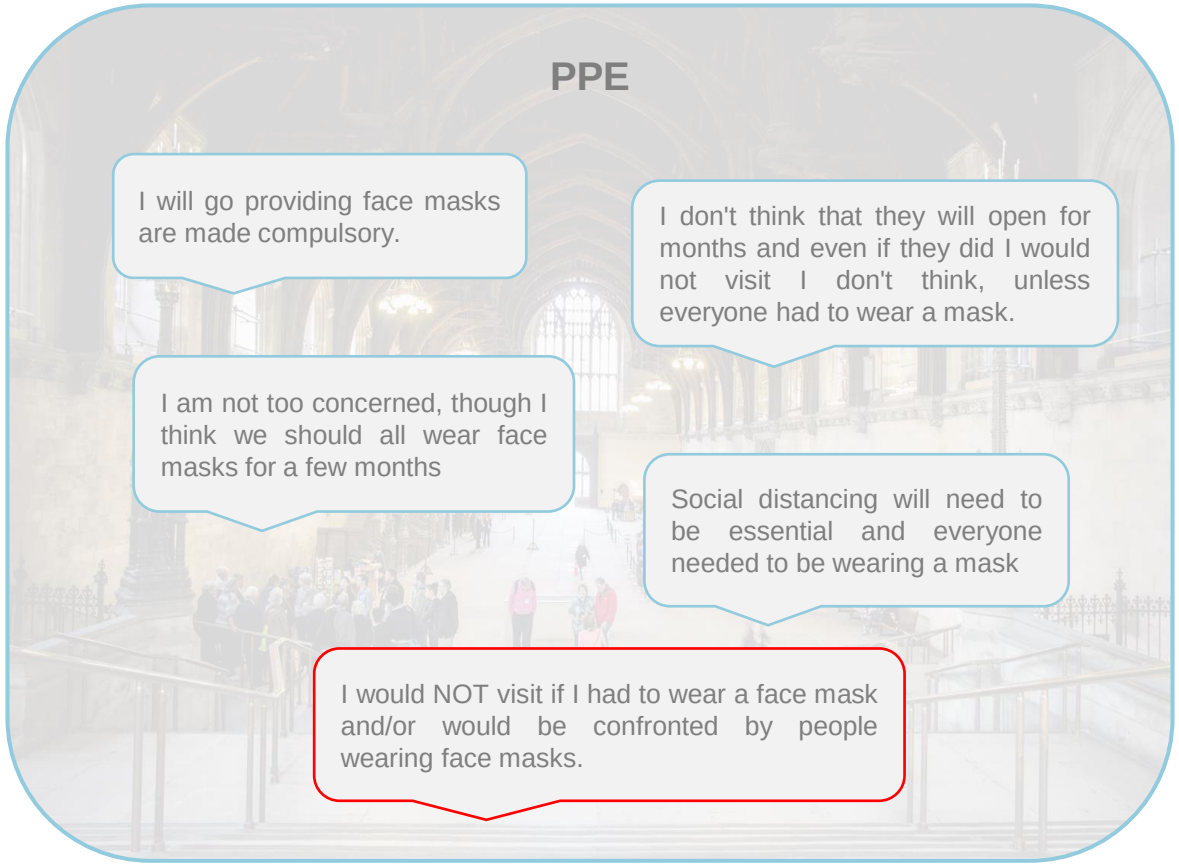

Q: Please tell us in your own words how you currently feel about visiting attractions once they re-open to the public. What are your hopes? What are your worries or anxieties?
Base: All respondents (668)

Those with children in their household are generally as likely to be reassured by each measure as other segments, although they are slightly more likely to feel more reassured by PPE

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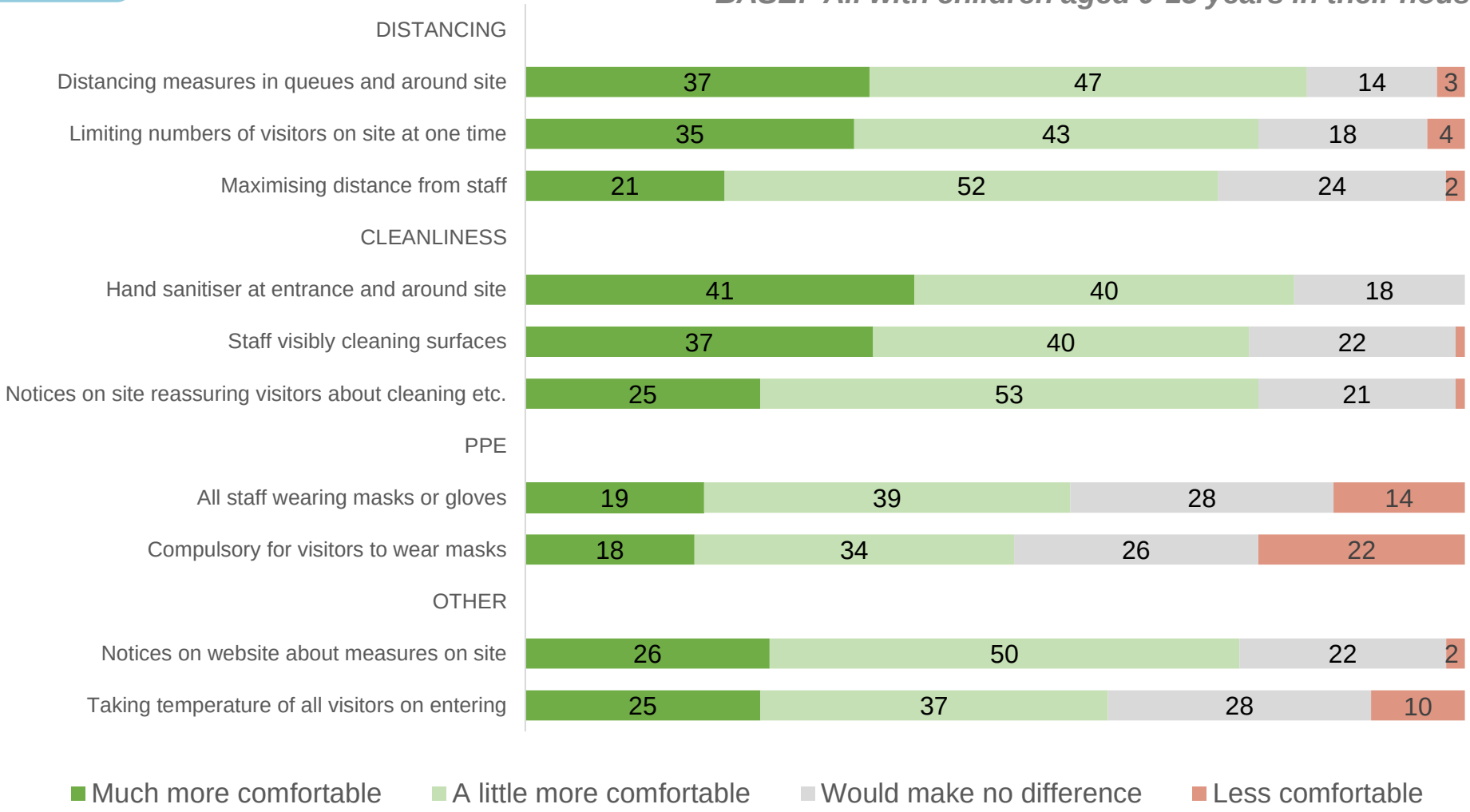
Which of these measures would make you feel more comfortable about visiting (%)

BASE: All with children aged 0-15 years in their household



88% more comfortable with a 'distancing' measure

88% more comfortable with a 'cleanliness' measure

68% more comfortable with a 'PPE' measure…..

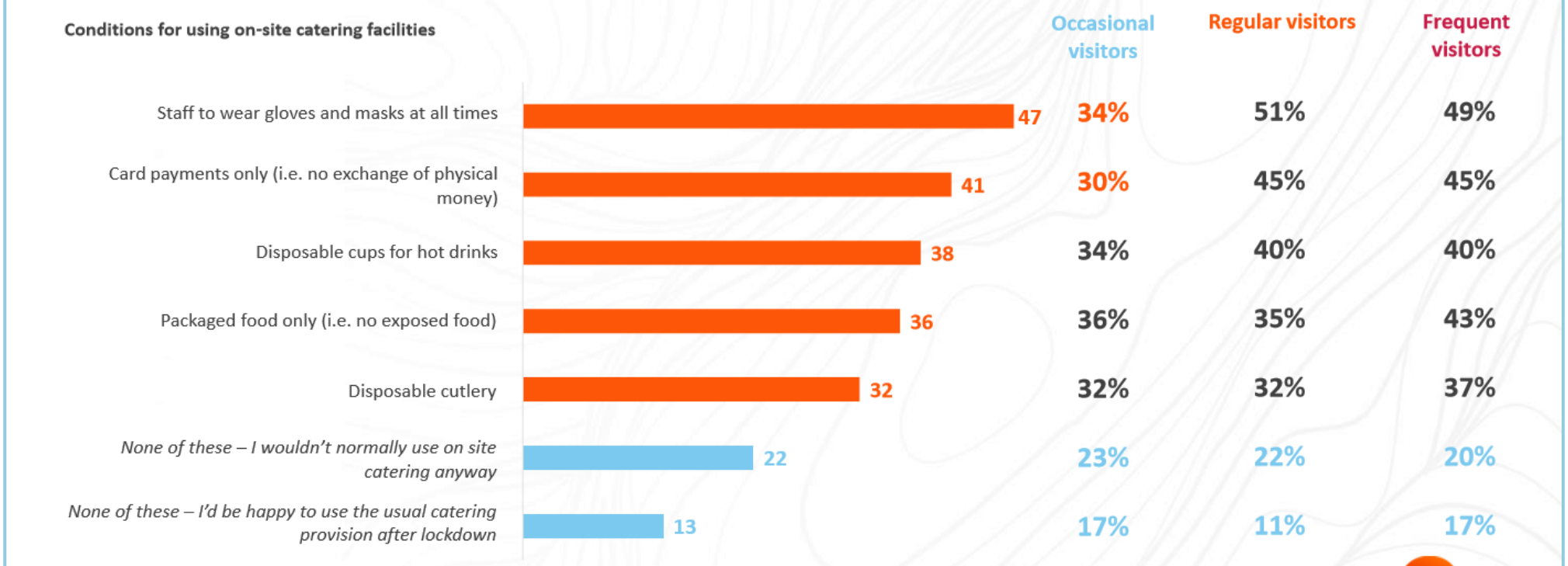
….but 25% less comfortable

Q: Thinking about attractions generally after they re-open, which of these measures would make you feel more comfortable about visiting?
Base: All with children aged 0-15 years in household (199)

BVA-BDRC tracker reinforces the concerns around using catering facilities, with over 80% of those who would usually use on-site catering facilities feeling that at least one extraordinary measure is necessary

The majority of visitors are expecting at least some measures to be taken in relation to on-site catering: staff wearing gloves and masks, as well as card payment only rules are most widely cited.

The greatest concern is around the more obvious ways that the virus could spread – through staff or physical money. Disposable cups, packaged food and cutlery are not *as* important but would be a priority for at least 3 in 10 attractions visitors. In practice however, attractions may want to phase in measures and consult with visitors on an ongoing basis. It's possible that visitors would be less demanding in practice than in theory, particularly if they observe good hygiene practices on site and in communications.



13 Q36a. Which, if any, of the measures below would be necessary for you to use on-site catering facilities?

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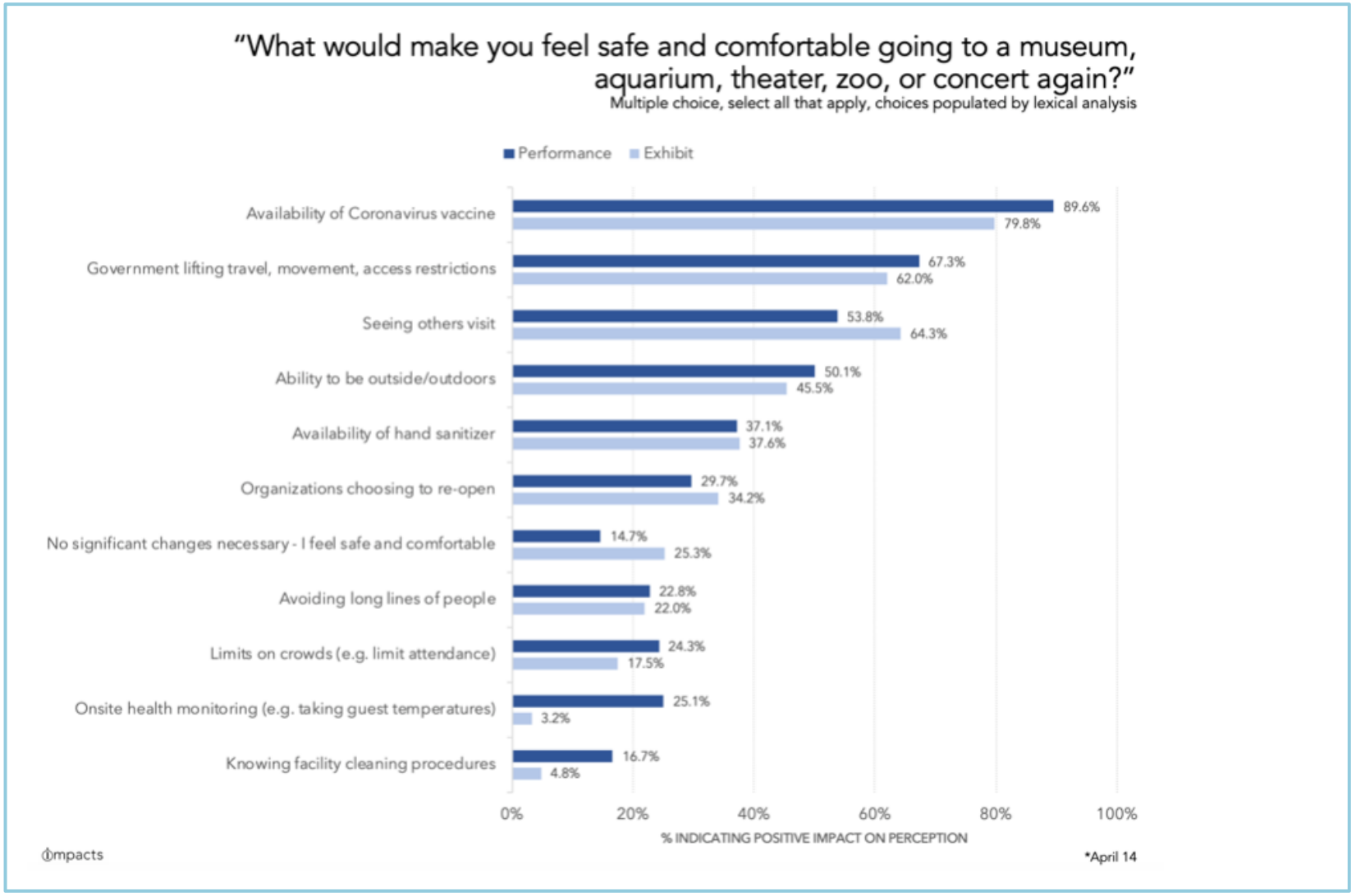
Research in the US reinforces some of the insights we are finding here and emphasises the importance of social proof. Hand sanitiser more important than social distancing in US



Source: coleendilen.com (US research among c. 6,000 adults, early April)

Above all, audiences feel that attractions should focus their efforts primarily upon providing a **safe environment** for visitors. A warm welcome, flexibility and patience are valuable bonuses, but visitors are not especially looking for financial benefits

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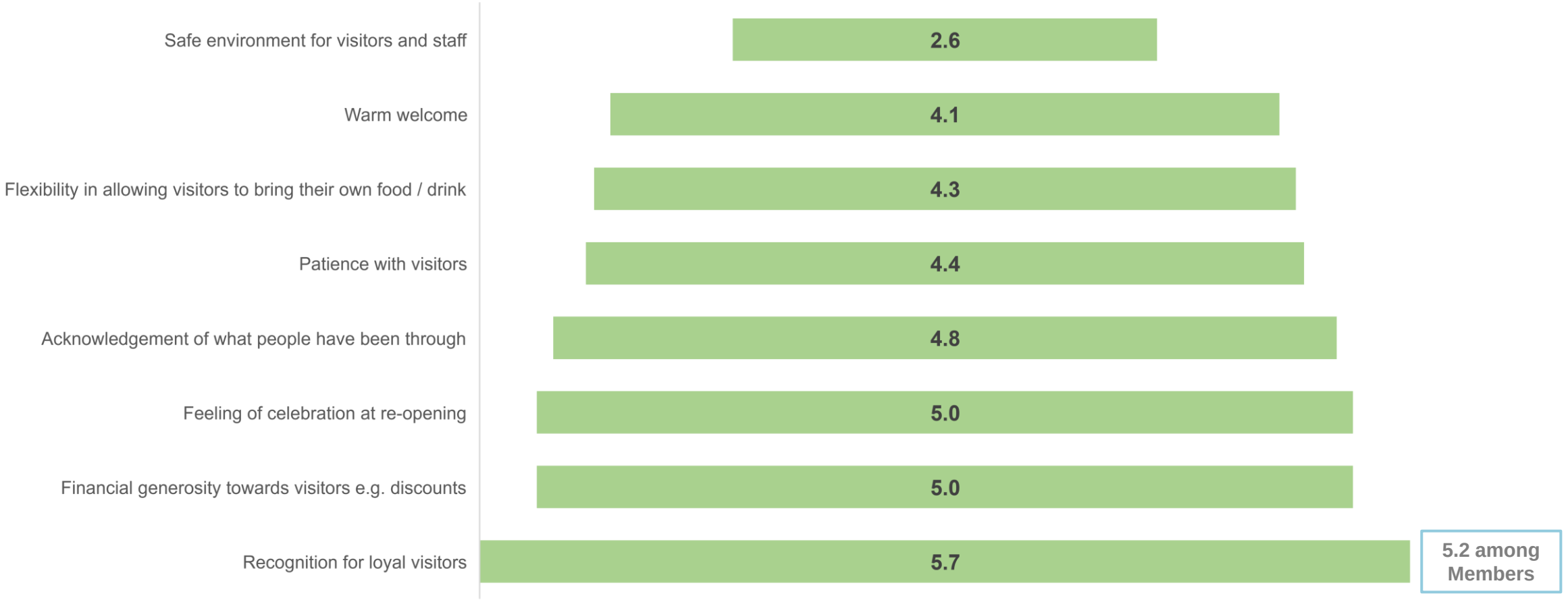
***Average Importance Ranking* of characteristics would most like to see in attractions when they re-open** (1=highest, 8=lowest)



Q: Which of these characteristics would you most like to see in visitor attractions when they re-open? Please rank these in order, starting with the characteristic that you would most likel to see, ranked as number 1.
Base: All respondents (668)



Key take-outs

Key take-outs / 1 *(Wave 1: 20-24 April)*

Market is highly cautious overall – waiting to see how well attractions handle the re-opening phase before committing to visits

How well we deal with fears over crowds and our ability to implement and police distancing measures on-site will determine our success

Therefore, all attractions need to take the time to get it right (could these inform a ‘kite mark’?):

- Limiting numbers of visitors on-site at once
- Be seen to be implementing and policing distancing measures on-site (not just lip-service), including toilets
- Consider only opening cafés and play facilities where distancing can be policed
- Can we be more flexible on providing picnic facilities in the short term?
- Hand sanitiser around the site and staff visibly cleaning
- PPE is more polarising, especially if compulsory for visitors

Moving elements of the visit experience outside, where possible, will undoubtedly help generate visits – outdoor kiosks, tours or even perhaps small events

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Key take-outs / 2 *(Wave 1: 20-24 April)*

Visitor-facing staff can have a hugely positive impact – providing a warm welcome and showing patience with visitor concerns

Pre-visit communications with the public is vital to support on-site actions:

- Can we use the trend for virtual online visits to demonstrate policing of distancing and other measures on-site?
- Any messaging around creating perceptions of physical open spaces, whether outdoor or indoor

We shouldn't assume that older visitors will take longer to return. They are amongst the keenest to come back, but perhaps need the most reassurance

Evidence of some increased altruism in the market presents some opportunities:

- Visitors are not expecting blanket price discounting
- Good time for donation asks, with altruism higher among young people and families at present

Some positive Membership opportunities:

- Current members are feeling particularly altruistic right now, again, a good time for donation asks
- Potentially a good time for recruitment, with the public likely to remain in the UK this summer
- Additional exclusivity benefits? *Priority booking, member-only days (visit limit), member-only indoor access?*

Next steps

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

- When the public has an outline timetable for re-opening
- When the public has information on the measures that attractions will be required to have in place
- Shortly after re-opening, as the public reacts to the new visiting environment and initial successes or otherwise

Incorporate any new issues as they emerge

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 1 (20-24 April)*

ATTRACTIONS RECOVERY TRACKER QUESTIONNAIRE

SAMPLE DEFINITION:

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

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

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

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

MAIN QUESTIONNAIRE

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

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

Q2. Thinking about how you feel at the moment, how soon do you think it will be before you visit each of these types of attraction after they re-open? RANDOMISE ORDER
(As soon as the opportunity arises, I will wait and see what happens for a short while, I am unlikely to want to visit for a long time, I don't tend to visit this type of attraction anyway)

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

Q3. And how much more anxious do you think you will feel about visiting each of these types of attraction after they re-open? RANDOMISE ORDER
(No more anxious than before, A little more anxious, A lot more anxious, I don't tend to visit this type of attraction anyway)

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

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

Hand sanitiser on entrance and around the site
Staff visibly cleaning surfaces, utensils, machinery etc.
Notices on the website about special measures in place at the site
Notices around the site reassuring visitors about cleaning and other measures in place
All staff wearing masks or gloves
Compulsory for visitors to wear masks
Social distancing measures in entrance queues and around the site
Limiting numbers of visitors on site at any one time e.g. timed tickets, online bookings only
Maximising distance from staff e.g. contactless payment only, self-service café
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