Lancashire COVID-19 Safe Recovery Survey

Table of Contents

Marketing Lancashire

1. Executive Summary

Marketing Lancashire set out to explore the behaviours, attitudes and perceptions of consumers in response to the COVID-19 pandemic, lockdown restrictions and subsequent changes to their leisure and travel activities alongside intentions and confidence towards future trips and activities. Consumer sentiments towards the application of safety precautions and measures against the spread of COVID-19 in tourism and hospitality venues were also considered. This was undertaken through means of an online consumer survey, conducted between 19th and 29th May 2020.

A total of 1,647 responses were received and key findings are presented within this report. It may be noted that the timing of this survey fell shortly after the Government published its COVID-19 Recovery Strategy and staged roadmap for easing elements of lockdown (11 May 2020). During this survey period, people could begin to drive to other destinations and were allowed outdoors for unlimited exercise. Other restrictions on unnecessary trips and social distancing remained in place.

There are a few points of note with regards to consumer demographics. Just over half of respondents (59%) stated that their place of residence was Lancashire with a further 21.5% originating from the wider Northwest region (of which Greater Manchester had the highest representation). Further responses represented a plethora of UK regions, but overseas respondents were not significant accounting for less than 1% of responses.

In terms of market segments, the majority of respondents defined themselves as forming a couple when travelling (58%), with families (including multi-generational families) forming over a quarter of responses (27%). This possibly reflects the average age range of respondents with over half (58%) aged over 55 years. Least represented were younger age groups with less than 1% aged under 25 years and just 6% aged between 25-34 years.

There was a good level of familiarity with those originating from outside of Lancashire whereby over three-quarters had visited the county many times before / within each year, either for a day trip or overnight stay. Just 1.74% stated that they had never visited before.

With consumers unable to travel out to enjoy their usual range of leisure activities, lockdown had influenced the uptake of a range of new online experiences with the most popular being ordering a food delivery from somewhere never tried before; live streaming or watching a previously recorded performance from a theatre, music or dance company; accessing educational resources and content from a business, destination or cultural venue and taking a virtual tour.

As lockdown begins to ease, consumer confidence in going back out and about was split between 41% who cannot wait to go out again and a slightly more reserved number (54%) who felt more cautious about doing so. 6% stated that they do not plan to go out anytime soon (it is not known whether this may reflect those respondents who may be shielding and are classed as more vulnerable). Somewhat greater levels of caution were observed amongst families and residents of Lancashire than other market segments.

The top activities people are most likely to do once out of confinement are:

- Going for a day trip to an outdoor location 61.57%
- Going for a day out to the coast 57%
- Going to a restaurant 46.77% and,

- Going to a pub 34.35%

Focusing more specifically on the next 12 months, respondents were asked how they believed their trip taking behaviour may change in relation to day trips and overnight stays, both domestically and overseas. For Lancashire, as a visitor destination, there is a potential net loss in the number of day trips of c. 5.6%. and potential a net loss of overnight stays of c. 11.2%. Intentions with regards to holidays overseas was more pronounced with almost half of respondents stating that they will take less trips abroad than usual. This could offer the potential to influence those intending to take less overseas trips into undertaking some domestic trips as an alternative, helping to negate the forecasted downturn in the domestic market provided that consumer confidence can be raised when it is safe to do so.

In terms of destination types that consumers would potentially consider visiting, rural coastline was most popular (65%), followed by countryside and villages (62%), mountains and hills (44%) and seaside towns (41%) making Lancashire well placed to welcome visitors when the time is right and when it is safe to do so. These results vary somewhat from consumer rankings nationally whereby one of the most notable differences was rural coastline considered by just under a quarter of consumers nationally (average of 22%); and mountains and hills which was considered by less than 20%; cities and large towns also featured more predominantly nationally, considered by almost a third of consumers. (Source: VisitBritain Consumer Sentiment Tracker 1 June 2020).

When looking at specific locations and venues within destinations, there is greater confidence in outdoor locations and venues than indoor ones, reflecting national sentiments. Parks and gardens, visiting small villages or towns and outdoor attractions (including farm parks) were perceived as the safest types of places and venue to visit. It may be noted that consumers were keen to visit retail venues, including farm shops / deli / food halls as well as non-retail establishments and markets once lockdown restrictions end. Theme parks and indoor cultural venues, particularly theatres and cinemas were least appealing with verbatim comments referring to challenges around social distancing and hygiene of common touch points within venues. Public transport – taking a train or bus ride and indoor experiences such as spas were also limited in their appeal to consumers at this time.

Attitudes towards when people might start eating out were mixed despite being one of the top activities that consumers were keen to do. Just one quarter of consumers said they hoped to visit either a pub, café or restaurant as soon as confinement is over. The majority, just under a third, are planning to wait for a few weeks after confinement has ended with around a further quarter intending on waiting a few months before they visit.

In terms of guest accommodation, confidence appeared greatest for self-catering establishments and camping /glamping / caravan options, possibly reflecting consumer concerns about hygiene standards of common touch points including bathrooms, bedding, etc as well as social distancing which can be more easily applied within these types of establishments. Some variation to national perceptions is noted here whereby there appeared to be greater propensity to stay in serviced accommodation with almost half (48%) respondents stating they would consider a stay between June-September and 62% who would plan a visit from October onwards. This compares to just 20% of respondents in this survey who would stay once lockdown ends and 31% who would wait several months before considering a stay in a hotel.

There is a clear need to regain consumer confidence towards tourism and hospitality venues through visible safety measures as well as sensitive messaging. The introduction of a COVID-safe national standard for businesses was supported by over half of respondents whilst over one third would be happy if this was a local standard. However, some commented that the absence of a standard would not deter visits and concerns were raised around the need to develop a standard through trustworthy sources with a clear evidence base. Issues around policing and monitoring were also raised.

2. Overall Survey Results and Key Findings

2.1 Introduction

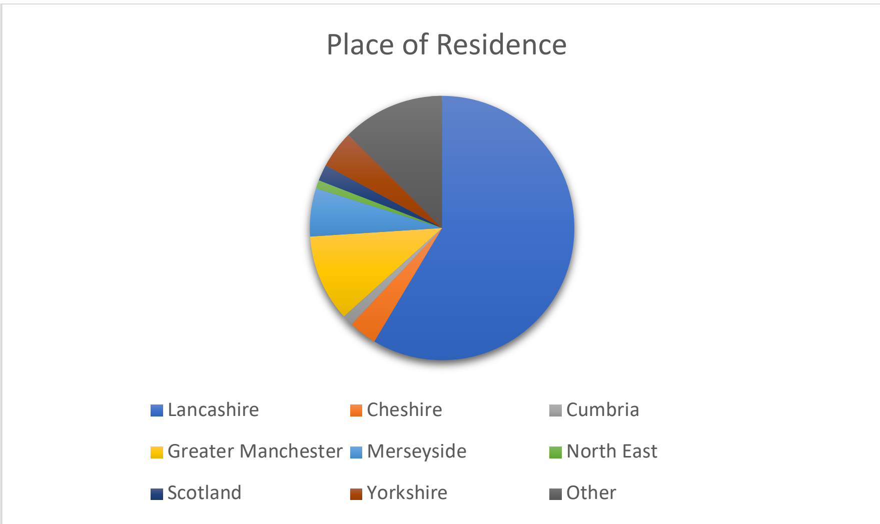
Marketing Lancashire conducted an online consumer survey between 19th and 29th May 2020 to explore the behaviours, attitudes and perceptions of consumers in response to the COVID-19 pandemic, lockdown restrictions and subsequent changes to their leisure and travel activities and future intentions.

The survey was conducted solely online and sent directly to our own database of businesses and also shared by our Local Authority partners, Lancashire Ambassadors and local Chambers of Commerce through their own channels.

A total of 1,647 responses were received and key findings are presented within this report.

2.2 Consumer Origins

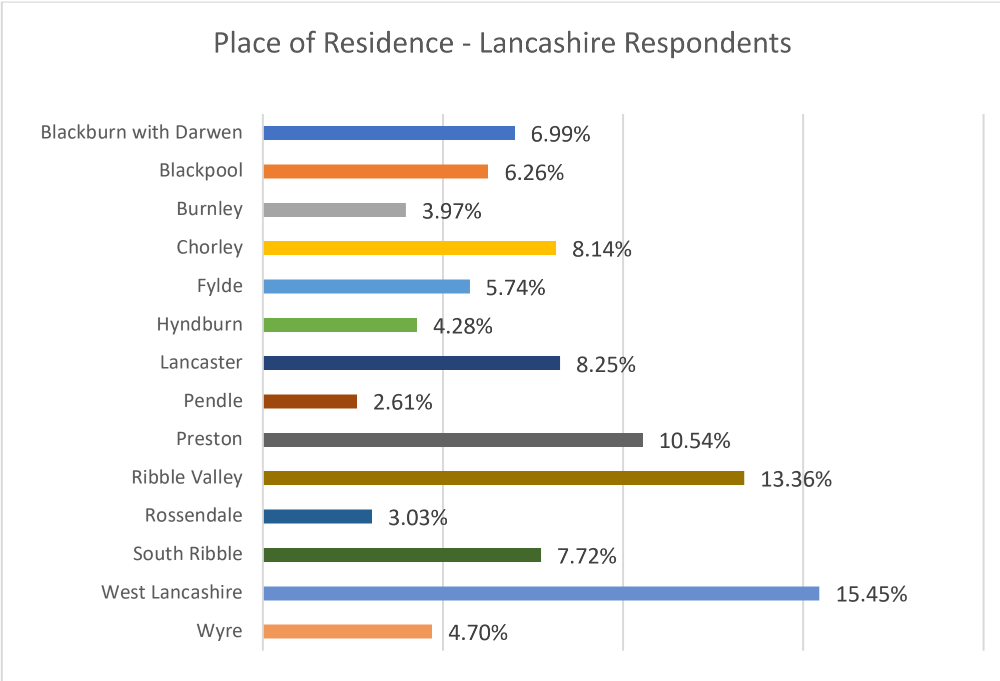
Over half of respondents were based in Lancashire (59.25%), with a further 21.5% from the wider northwest region. Great Manchester was the most represented northwest region outside of the county. Further respondents originated from Yorkshire (4.62%), Scotland (2%) and the North East (1%). 12% respondents stated their origins as ‘other’ and included a plethora of wider UK regions. Overseas respondents were not significant in this survey accounting for just 0.6% of responses.



Within Lancashire, responses were received across all district areas; the highest number of respondents were noted from:

- West Lancashire 15%
- Ribble Valley 13%
- Preston 10%

The rest of the county is fairly evenly represented with Pendle (2.61%) and Rossendale (3%) yielding the lowest level of responses.

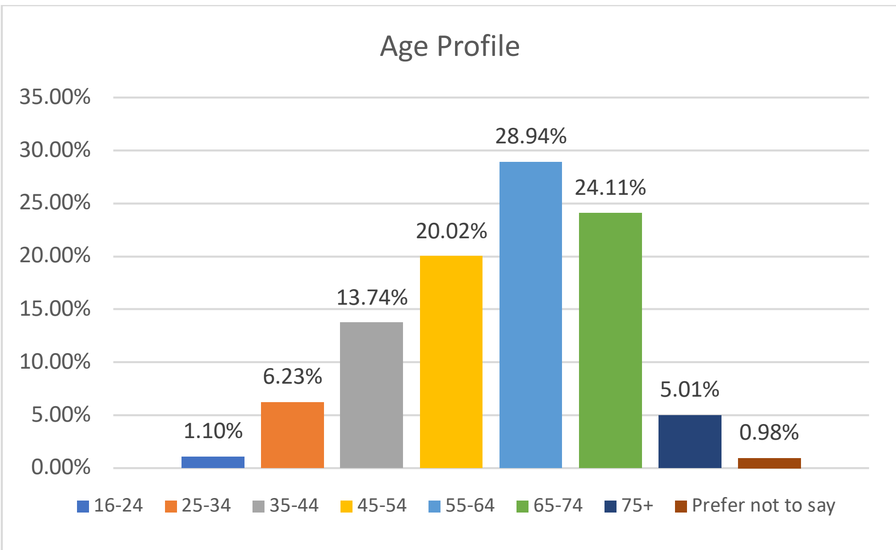


2.3 Consumer Demographics

The main age of respondents was 55+ years (58%) split 28.94% between 55-64 years; 24.11% between 65-74 years and 5% over 75 years.

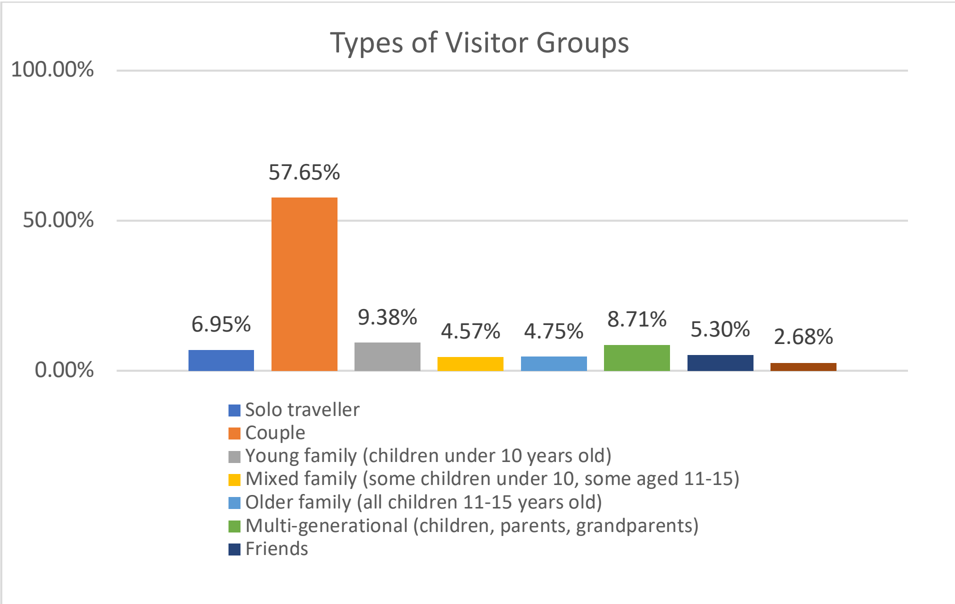
One fifth (20%) were aged 45-54 years whilst 13.74% were between 35-44 years. Younger age profiles were least represented with just 6.23% aged between 25-34 years and just over 1% aged less than 25 years.

The demographic profile of respondents may account for some element of bias in responses, particularly in terms of activities undertaken or planned, for example, there is likely to be less propensity to visit theme parks amongst those aged 55+.



Marketing Lancashire

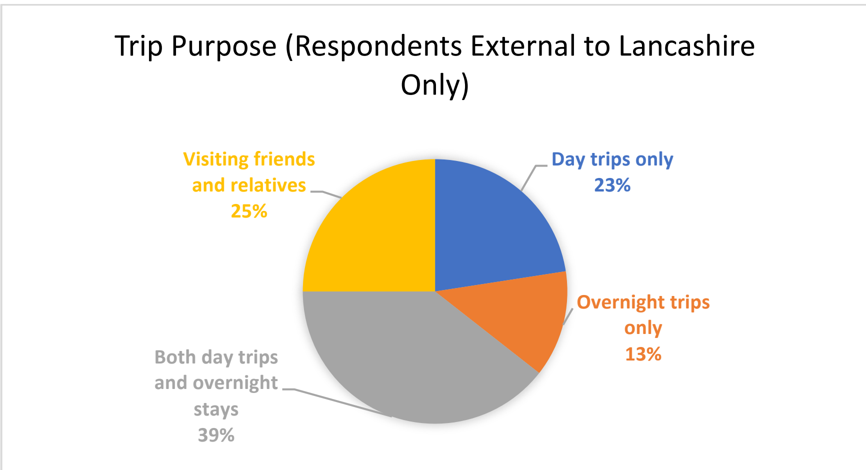
Age profiles tend to reflect the group characteristics of consumers with most travelling as a couple (57.65%), followed by families (including multi-generational families) (27.41%). Groups of friends accounted for just 5.30% of visitors and solo travellers 6.95%.



2.4 Visits to Lancashire Pre-Pandemic

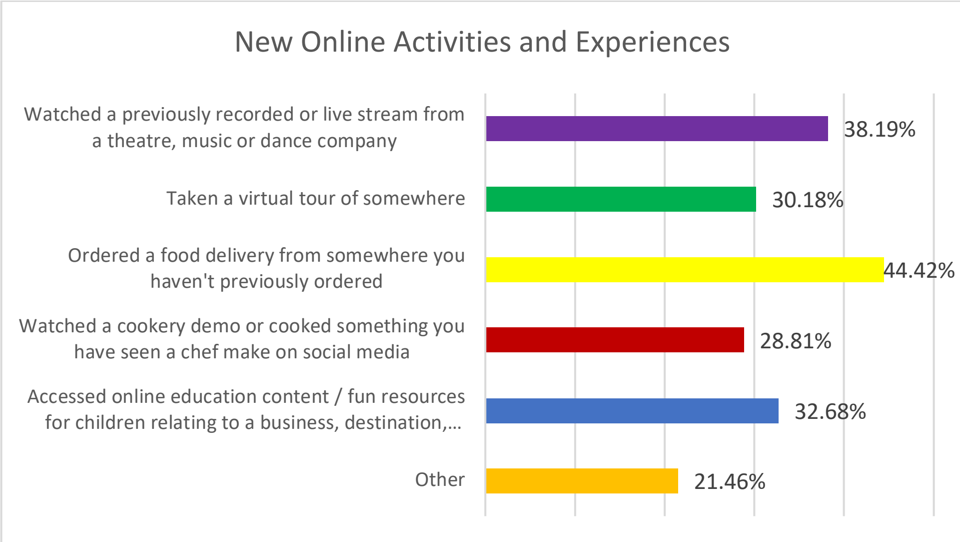
Respondents originating from outside of the county were asked about their previous experience in making trips to Lancashire; the majority stated they had previously visited the county with over three-quarters having visited many times before or each year (combined total 78%) and just 1.74% had never visited Lancashire before.

The purpose of these visits included both day trips and overnight stays for around half of consumers (49.5%). Stays with friends and relatives (SFR) was also a significant driver, accounting for almost one third of trip purposes (31.39%). Consumers who visited solely for day trips accounted for 28.32% of visits whilst those who stated they had just experienced overnight stays totalled 16.35% of responses.



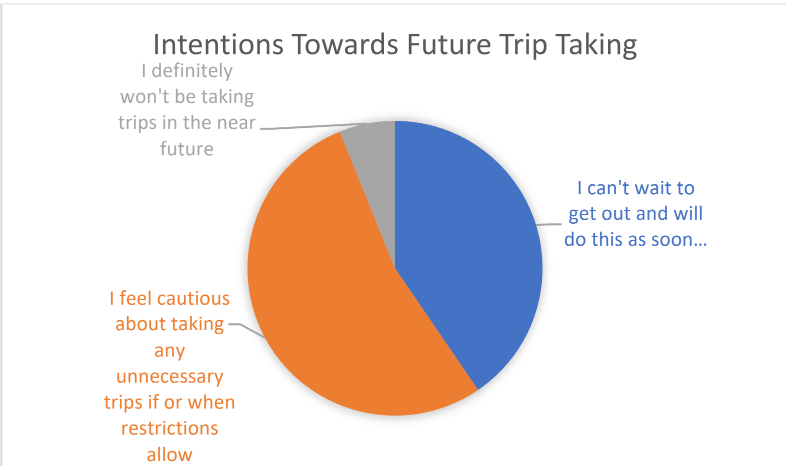
2.5 Influence of Lockdown on New Online Activity

When asked about the impact of lockdown in stimulating participation with new online activities and experiences, responses were fairly evenly split with slightly higher numbers stating that they had ordered food deliveries from somewhere they had never ordered before (44.42%). This was followed by live streaming or watching a previously recorded performance from a theatre, music or dance company (38.19%); accessing educational resources and content from a business, destination or cultural venue (32.68%); taking a virtual tour (30.18%) and watching a cookery demonstration (28.81%). 'Other' activities (21.46%) frequently mentioned by respondents included online fitness classes and videos, online shopping and quizzes.



2.6 Intentions towards Future Trip Taking

When questioned about future trip intentions there was a fairly even split of opinion across all respondents, between 41.11% who can't wait to get out and a slightly higher proportion (54.26%) who feel more cautious about taking unnecessary trips. Only 6.21% stated that they wouldn't be heading out anytime soon.



Focusing more specifically on the next 12 months, respondents were asked how they believed their trip taking behaviour may change in relation to day trips, overnight stays both domestically and overseas.

	Feel they would take more trips	Feel they would take less trips	No change / same number of trips
Day Visits (UK)	24.5%	30.1%	34.8%
Overnight stays (UK)	21%	32.2%	30.2%
Overseas Visits	3.7%	44.9%	16.3%

In relation to day trips, around one third felt that there would be no change in the number of day trips undertaken (34.8%), whilst just under the same level (30.1%) felt that they would take less day trips and around a quarter (24.5%) stated they planned to take more day trips than usual. Potentially, this could result in a net loss in the number of day trips of c. 5.6%.

When it comes to overnight stays in the UK, figures were broadly similar with just under one third stating that they believed they would take the same number of trips (30.2%); a further third stated they planned to take less overnight trips (32.2%) whilst 21% stated they would take more trips than usual. Potentially, this could result in a net loss of overnight stays of c. 11.2%

Intentions with regards to holidays overseas was more pronounced with almost half (44.9%) stating that they will take less trips abroad than usual. Just 3.7% felt that they will take more overseas trips than usual and 16.3% believed they would take the same number. A further 19% were unsure about taking overseas trips whilst 16.2% declaring they don't take this kind of trip. This could offer the potential to influence those intending to take less overseas trips into undertaking some domestic trips as an alternative.

2.7 Intentions towards Future Trips to Tourism and Hospitality Venues

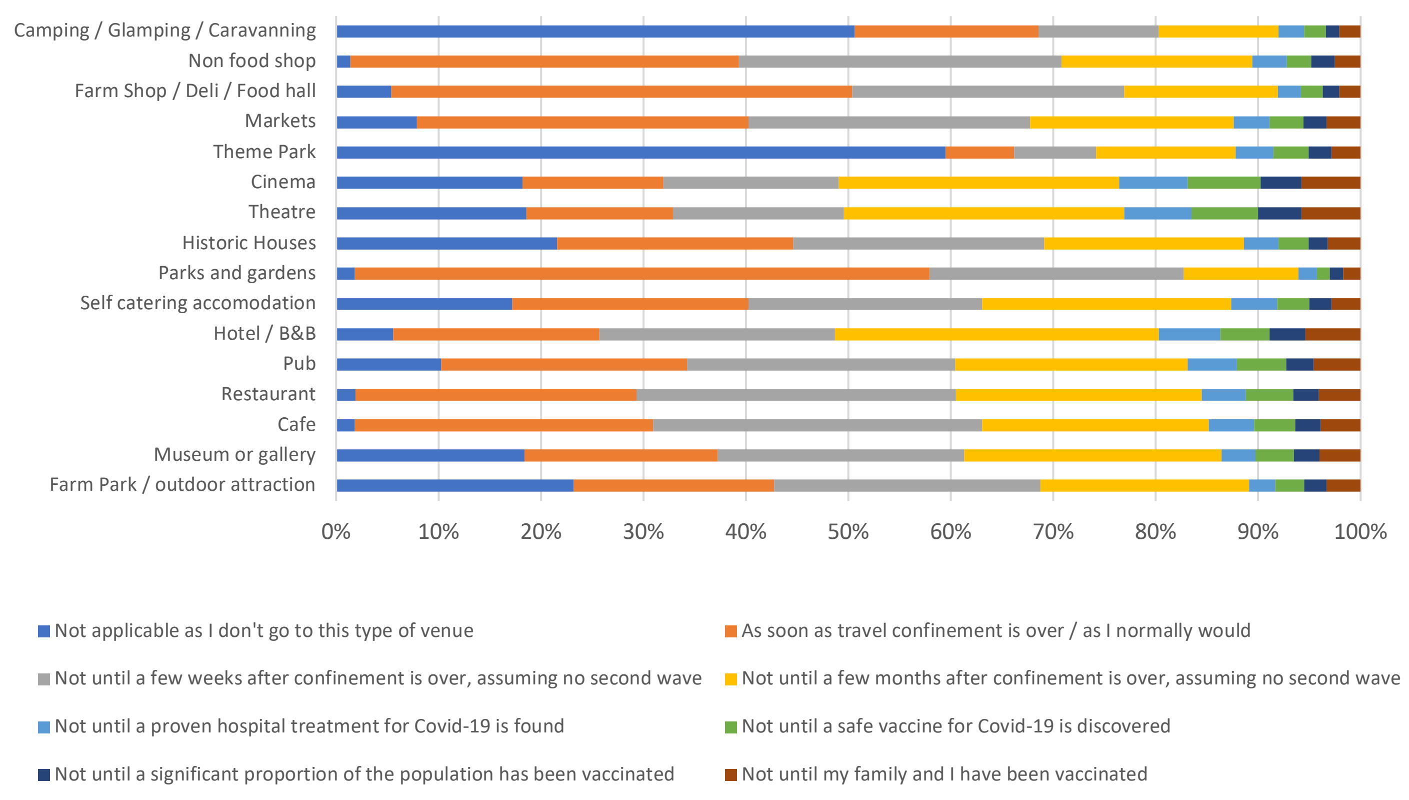
Respondents were asked about a range of venue types and asked to indicate how soon they believed they might visit once confinement and travel restrictions are lifted. Results show a clear propensity to visit outdoor parks / gardens and retail venues once lockdown has ended, with responses totalling 56.2% for Parks and Gardens; 45% Farm Shops / Deli / Food Halls and 37.9% for non-food retail shops or outlets. Similarly, around one third, 32.4% stated they would visit a market as soon as confinement ends.

Theme parks and indoor cultural venues were least appealing to consumers, receiving the largest levels of responses for those who do not intend to visit for some months after confinement is lifted. (27.4% noted for both theatres and cinemas; 25% for museums and galleries and 19.5 % for historic houses). Whilst 13.6% stated they would not visit a theme park for several months, it should be noted that the majority of respondents (59.5%) stated that they don't tend to visit this type of attraction anyway.

Attitudes to eating out were mixed with around a quarter of consumers hoping to visit either a pub, café or restaurant once confinement is over (29% cafes; 27.4% restaurants and 24% pubs). The majority, just under a third, are planning to wait for a few weeks after confinement has ended (32% cafes; 31% restaurants and 26% pubs) and just under a further quarter intending on waiting a few months before they visit (22% cafes; 24% restaurants and 22.7%

pubs). Note that no definition of 'pubs' was provided to respondents and may therefore include gastro-style food pubs as well as traditional public houses.

A more cautious approach to overnight stays and guest accommodation was observed. Whilst 20% were keen to visit hotels when confinement ends with 23% considering self-catering accommodation and 17.9% for camping / glamping and caravans, the majority felt they would wait either several weeks or months prior to visiting. Those intending on waiting several weeks represented 23% responses for hotels and also for self-catering, with 12% for camping / glamping and caravan. Those intending on waiting several months before visiting totalled 31.6 % for hotels / B&B's; 24.3% for self-catering establishments and 11.7% for camping / glamping / caravans.

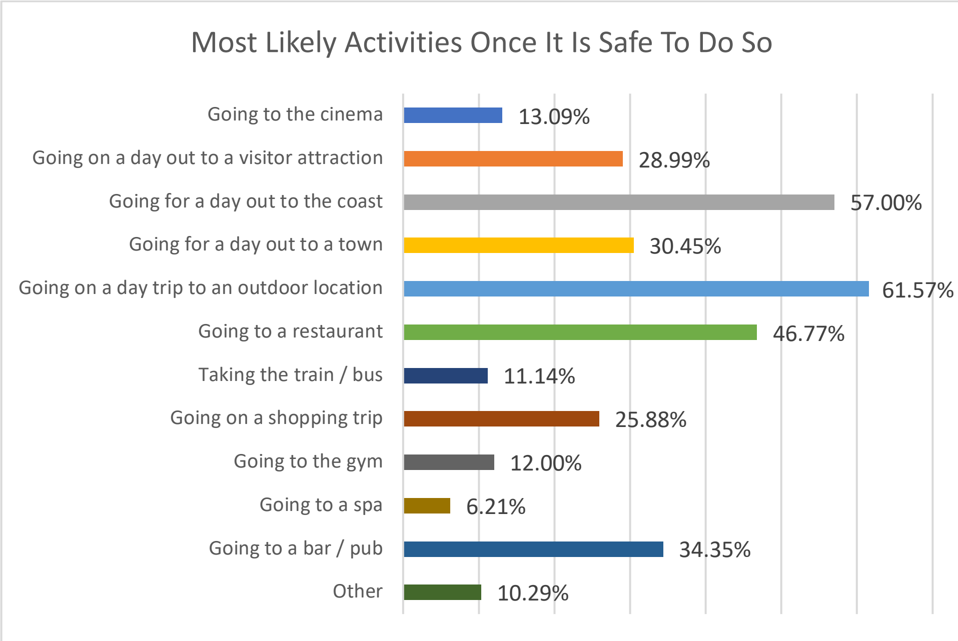


2.8 Intentions towards Future Activities

The top activities people are most likely to do once out of confinement are:

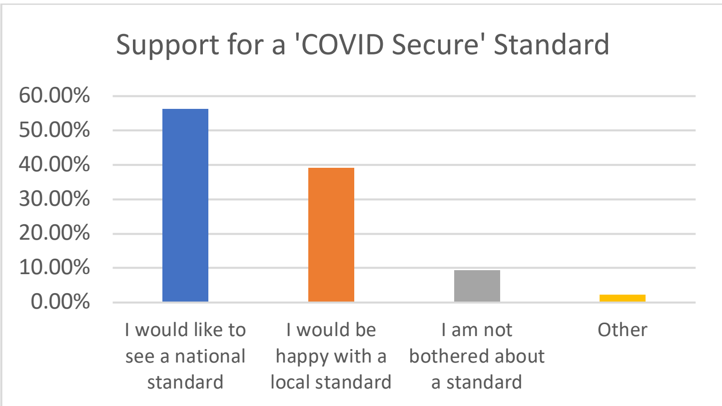
- Going for a day trip to an outdoor location 61.57%
- Going for a day out to the coast 57%
- Going to a restaurant 46.77% and,
- Going to a pub 34.35%

Activities that were least appealing were going to the cinema (13%), taking a train or bus ride out (11.14%) and visiting a spa (6%). 'Other activities' commonly stated by respondents as those they would like to do included going swimming, visiting friends and relatives, and going to their caravan. Outdoor activities such as walking, cycling, golf were also mentioned numerous times.



2.9 Safety Precautions and Measures in Tourism and Hospitality Venues

Over half (56.29%) of respondents would like to see a national standard to demonstrate that businesses are implementing COVID-safe precautions and measures whilst 39.13% would be happy with a local standard.



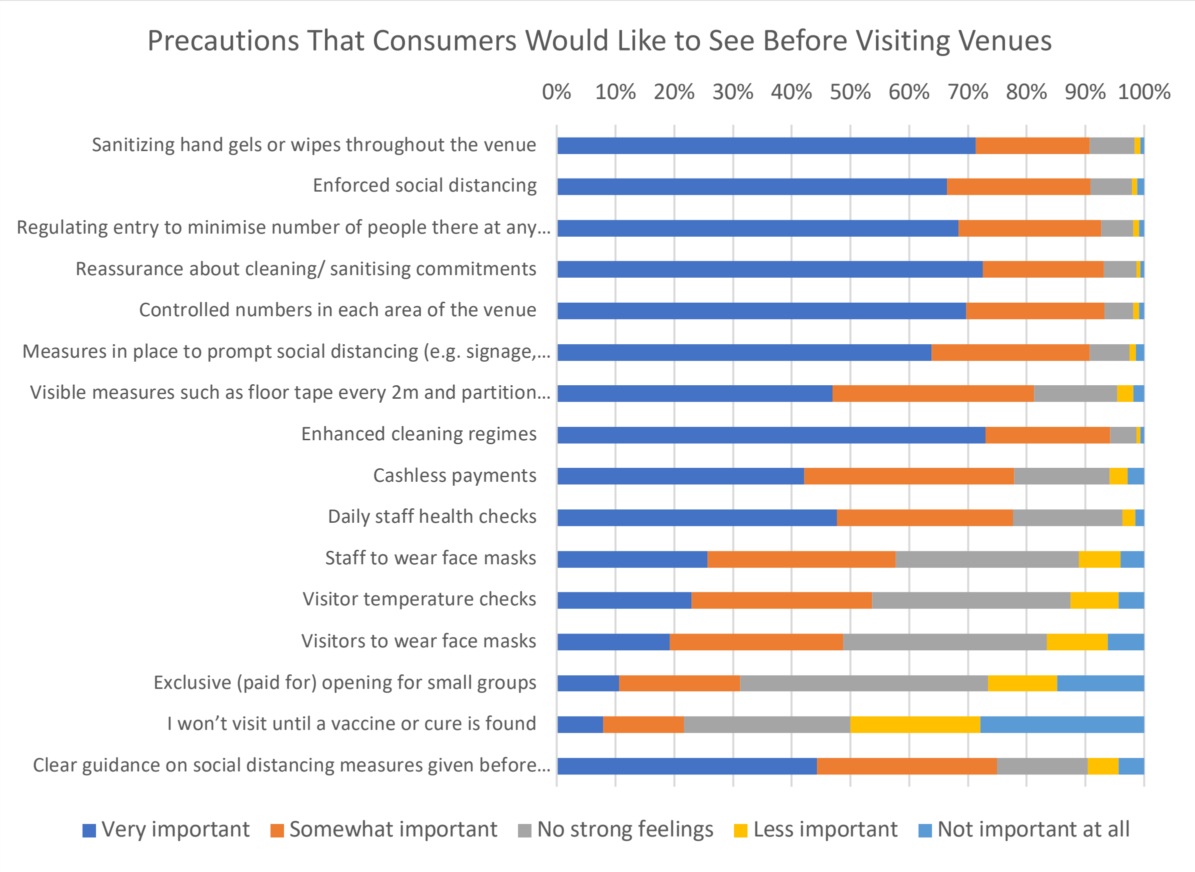
However, several questions were raised by respondents around how the standards would be set, monitored, or policed. The question of who would set the standards was also a point of concern with the need for a trustworthy source including input from the hospitality sector and a scientific evidence base. In general, whilst the use of a standard could provide added reassurance to some, the absence of one would not necessarily stop visits, particularly if visible steps can be seen to be taken by venues when consumers are visiting them. However, there were some that felt that, no matter what standards are introduced, there will always be some risk from other consumers who do not play their role in taking any advisory precautions. A range of verbatim comments are provided below to demonstrate those points raised:

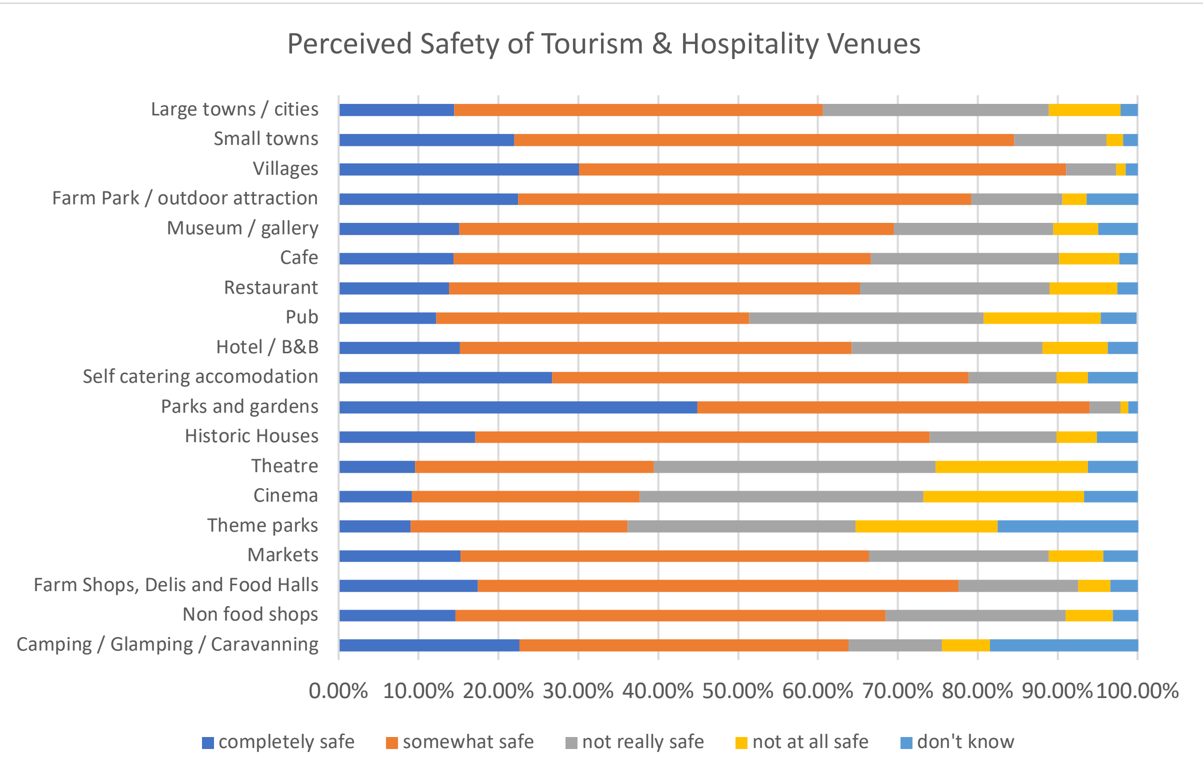
> *I would like to see government introduce legislative guidelines for businesses to follow, but a lack of these wouldn't stop me getting out and about as soon as things reopen*
>
> *Once the gov establish a 'standard' for safety re Covid I will be comfortable with visiting anywhere. If I observed reckless behaviour I would simply take myself out of there. Wouldn't everyone?*
>
> *You can probably determine from my answers that I am looking forward to the lockdown being lifted and I will endeavour to remain 'socially distant' from others, but I don't think control measures such as enforced social distancing are necessary. I think businesses should try to follow a national standard (where possible) and if I feel that a venue is 'unsafe', in that it is too crowded, I will leave and won't return until the outbreak has finished. I think the National Standard should be voluntary because it simply won't be feasible for some businesses to adopt it*
>
> *Everyone needs to still be vigilant but guidance and a "kite mark" or rating much like the food hygienist rating will help gain people's trust so they have more confidence when visiting the local area*
>
> *I am confident venues/premises will be doing their best to comply with guidelines and open safely. I have much less confidence in the public to be sensible about precautions and guidelines!*
>
> *No matter what safety measures and guidelines are put in place there will always be idiots who break rules. I'd be more 'nervous' sitting next to someone for hours in a theatre or on transport. Eg steam train trip (which I love) or at a larger theme park that can't be constantly monitored than being able to wander at a distance at the coast or national parks etc.*
>
> *I think tough guidelines and thorough instructions are needed because there are many people already looking for loopholes. I work in the beauty industry and I would welcome the guidelines so that I know we are safe, our clients are safe and our families are safe. I am also in no rush to resume normality... I feel as though we need to take our time with this, coming out of lockdown is causing as much anxiety as being in it!!*

When it comes to the safety measures that consumers would want to see before frequenting a venue there were some very strong opinions with the following being rated very important or somewhat important by over 90% of respondents:

- Sanitizing hand gels or wipes throughout the venue 90.7%
- Enforced social distancing 90.9%
- Regulating entry to minimise number of people there at any one time 92.8%
- Reassurance about cleaning/ sanitising commitments 93.1%
- Controlled numbers in each area of the venue 93.3%
- Measures in place to prompt social distancing (e.g. signage, staff) 90.8%
- Enhanced cleaning regimes 94.2%

Visible measures such as 2 metre floor tape spacing and partitions were also ranked highly with over three-quarters (average of 81%) keen to see this in place. Daily health checks for staff were also considered very or somewhat important by three-quarters of respondents (average of 77.6%). Similar levels of importance (75% respondents) were attributed to the provision of clear guidance for potential visitors on social distancing measures before arrival (either online / social media / by telephone) whilst precautions such as face masks, temperature checks for visitors and cashless payments were seen as less important.


Precautions That Consumers Would Like to See Before Visiting Venues
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Sanitizing hand gels or wipes throughout the venue
Enforced social distancing
Regulating entry to minimise number of people there at any...
Reassurance about cleaning/ sanitising commitments
Controlled numbers in each area of the venue
Measures in place to prompt social distancing (e.g. signage,...
Visible measures such as floor tape every 2m and partition...
Enhanced cleaning regimes
Cashless payments
Daily staff health checks
Staff to wear face masks
Visitor temperature checks
Visitors to wear face masks
Exclusive (paid for) opening for small groups
I won’t visit until a vaccine or cure is found
Clear guidance on social distancing measures given before...
Very important
Somewhat important
No strong feelings
Less important
Not important at all


Perceived Safety of Tourism & Hospitality Venues
Large towns / cities
Small towns
Villages
Farm Park / outdoor attraction
Museum / gallery
Cafe
Restaurant
Pub
Hotel / B&B
Self catering accomodation
Parks and gardens
Historic Houses
Theatre
Cinema
Theme parks
Markets
Farm Shops, Delis and Food Halls
Non food shops
Camping / Glamping / Caravanning
0.00%
10.00%
20.00%
30.00%
40.00%
50.00%
60.00%
70.00%
80.00%
90.00%
100.00%
completely safe
somewhat safe
not really safe
not at all safe
don't know

In terms of perceived safety of venues and locations within destinations, most people would generally feel safe subject to compliance with any government / official guidelines. Consumers ranked the following types of venues and locations highest for perceived safety:

- Parks and Gardens (94% considered them somewhat or completely safe);
- Small Villages (91% considered them somewhat or completely safe);
- Small Towns (84.6% considered them somewhat or completely safe); and
- Farm Parks / Outdoor Attractions (79.2% considered them somewhat or completely safe).

Perceptions dropped considerably for venues such as theatres with just over one third of all respondents (39.5%) considering them somewhat or completely safe; perceptions were similar for cinemas (37.7%) and theme parks (36.25%).

A number of verbatim comments made by survey respondents regarding the safety of tourism and hospitality venues are set out below, demonstrating concerns regarding hygiene standards particularly of key consumer touch points including toilets, bathrooms and bedding, alongside wider safety precautions and the need to balance these against the provision of an enjoyable visitor experience. There is also a clear propensity towards outdoor venues and experiences whereby measures such as social distancing are easier to maintain providing that crowds and points of high footfall can be avoided:

> *Venues need to build outdoor areas, covered if necessary, for eating/ drinking out, for group exercise, for theatre and film shows and lectures. Indoor activities can space visitors out, and ration time spent indoors by visitors. People need to be able to get out and about - we are social creatures - but safety must be paramount.*

> *Businesses need to adhere to all the necessary government guidance of course. It will be difficult to balance that with trips actually still being enjoyable. It's not just confidence it's knowing it won't be stressful and for me, letting the initial rush of people to venues pass so it's actually relaxing. I'd like to see venues especially hotels customising their offering to make it compliant as well as enjoyable. Maybe that will help them open sooner. It should be on an individual basis as some venues will more easily be able to adapt than others. Like providing room service instead of using the bar or restaurant, marking out or allocating particular seating spaces or outside spaces to each room so it's still a proper experience and can be managed better and everyone knows where they are with arrangements*

> *In fairness, social distancing, having restricted numbers, face masks and the like, would really spoil going out anyway. It acts as a clear reminder of the virus, it then creates a sense of worry, and it means you can't get away from it. Social distancing is awkward, it allows people to judge, tut or get cross at you, it would add to the stress, there would be long queues, I don't think I would want to go out to these places if all this would be going on, I'd sooner not bother, its less stressful. The enjoyment is sapped out of it.*

> *I like the idea of pre-booking a time slot at smaller attractions like historic houses to limit the number of visitors at any one time. It's much easier to social distance out of doors. I'm not in favour of attending theatres and cinemas and sitting for several hours in close proximity to other people as again, I'd be unable to move away to a safer distance.*

> *I will be happy to visit most outdoor locations and some indoor locations providing there are visible measures to protect myself and staff. I would not be happy attending any large gatherings, concerts, cinema etc*

Outdoor attractions / venues have a higher appeal. However not places with a large footfall or which would encourage a high number of touchpoints eg Theme park with queues and high turnaround on rides with safety belts and other such touchpoint. Non food retail where there's a high footfall and people picking up and putting down lots of items doesn't appeal either.

My main concern would be the quality and frequency of cleaning. Most places and people have got the hang of social distancing now, but if I go to a cafe/restaurant/cinema for example, how do I know that the toilet facilities are virus free? The same also applies for any furniture I might touch. In a non-food shop, I would worry about who has touched the clothes/books/ornaments for example before me and have they transferred the virus to those surfaces. I know that I can wash my hands or use anti-bac gel, but it would be quite difficult to remember to do that after touching anything.

Worry about shared toilet facilities. Staff wearing false PPE ...eg gloves that are never changed from one transaction to the next.

I feel that I won't feel confident to visit anywhere until infection numbers are low and a successful vaccination program has started. I would feel more confident visiting wide open spaces with low numbers of people than places such as cinemas or theatres which I would not consider before inoculation. From the point of view of hotel stays I would worry about using the same pillows and duvets as other people. I would probably want to take my own with me.

If I go on holiday this year it is likely to be camping with all of my own facilities including, somehow, a shower and a portable toilet!

Most likely to visit outdoor venues, including outdoor cafes. For overnight stays would only consider self catering that I can clean myself and nobody else enter for the duration of my stay

Feeling safe will depend on how well managed the establishment is in keeping their own staff and customers safe

My main concern is the cleanliness of places to visit/attractions. I know venues will have an end of day clean but I imagine it's not thorough and therefore there are an unfathomable number of germs in places such as cinemas, theme parks and historic houses that haven't been cleaned properly in years and I think this pandemic will make people more aware of where they are and what they're touching around them.

Leisure and hospitality need to provide bathroom facilities. How can you guarantee a cubicle can be sanitised after each use and be Covid secure.

It's the queues for the toilets and the bar that puts me off theatre/cinema/concerts. Social distancing could be arranged for seating but not loos/refreshments. The venues can't manage these at the best of times!

The actual attraction isn't the issue. Its the crowds there that are! A quiet campsite, quiet market, quiet foodshop are all fine. I would hate to spend money on a trip and then feel uncomfortable when I get there. Small, lower risk, affordable activities, eg a picnic in the countryside at least allows for us to cancel, or leave if it is too busy. I would want to avoid tourist honeypots.

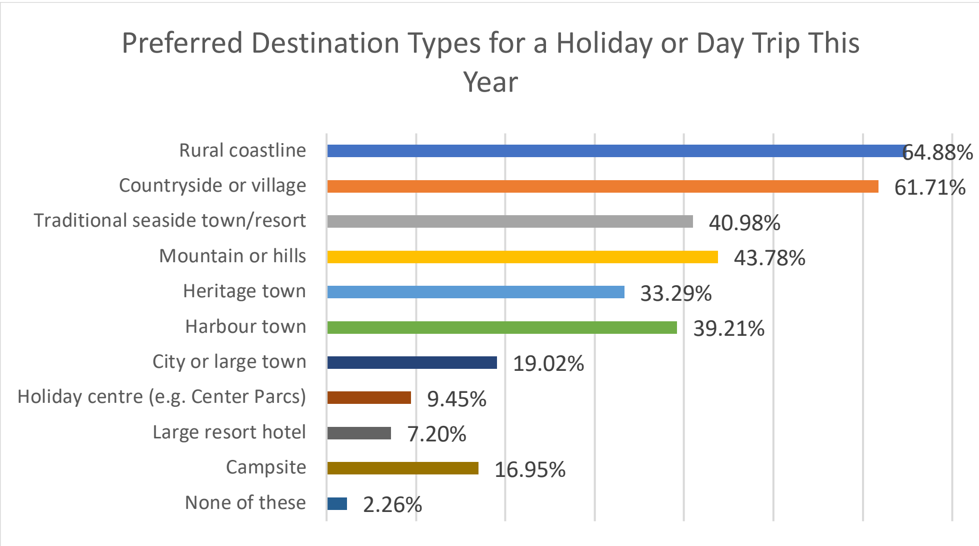
If anywhere is to have social distancing/other measures in place e.g. limits on customers should be posted on websites and social media. Booking system needs to be in place to avoid wasted trips if venues are to enforce a maximum capacity

Businesses do their best to be COVID secure, but it's the behaviour of the general public which can jeopardise that. Anywhere that serves alcohol would make me nervous as people who are intoxicated will be less able to stick to the 2m rule. The virus can spread through by *breathing in aerosols so the 2m rule is important and I'm therefore more comfortable outdoors, but it can also spread by touch where droplets have landed or been moved by hand contact. Hand-washing is therefore important but so is keeping surfaces clean, so somewhere like a theme park where there's a lot of shared equipment would be hard to keep on top of cleaning so I'd feel less safe there.*

I really want to support the businesses that provide the activities that we did previously, but need to feel that they have done everything possible to manage the risk - including from other visitors who may be more relaxed about the situation. Clear and detailed information beforehand and on site is really important. And perhaps 'dip a toe in the water' options to build confidence with lower cost rather than all or nothing - with easy chance to upgrade on the day and/or come back for more later. Thinking more as completing this, confidence really is the issue, so we are likely to focus on and return to anywhere that provides confidence

2.10 Preferred Holiday Destination Types

Respondents were asked to consider what type of holiday destination they would prefer to visit over the next twelve months, with the top destination types being rural coastline (64.80%) and the countryside or villages (61.71%), followed by mountain or hills (43.78%), traditional seaside town/resort (40.98%), harbour towns (39.21%) and heritage towns (33.29%). Destination types with the least appeal were large resort hotels or holiday centre (7.20% and 9.25% respectively).



Factors influencing destination choice can be seen through a number of verbatim comments outlined below:

I'm bothered about going to a destination where there may be large groups of people congregating and completely ignoring any and all social distancing signs, requests etc. This is already happening in Lytham St Annes where we live so we are not really going out, other than in our very local area. Our friends of similar age group, and family feel the same, it's not us we're worried about but others flouting the rules.

I want to get back out there and explore the UK as much as possible. Due to information I receive there are some places in the UK that I would feel safer and more comfortable in because they have kept me informed.

It will be wonderful to get to travel again in the UK and a good place to start to build confidence again

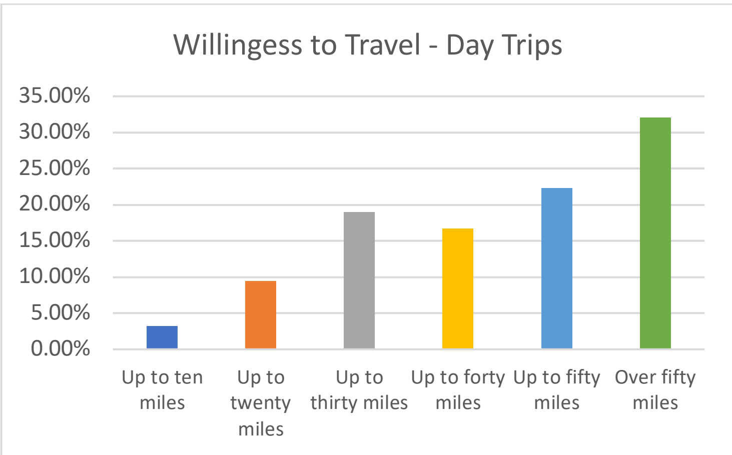
It is not about my safety it is about the safety of others and the people around me. If there isn't a National standard for getting back to ""Normal"" then consequently no hospitality services should be offering their services which could negatively impact a specific area such as the Lakes, Isles and coastal towns where an influx of visitors would cause a high impact and increase of virus transmission. As things stand right now people need to stay in their designated ""Areas"" so not to spread the virus around the Country

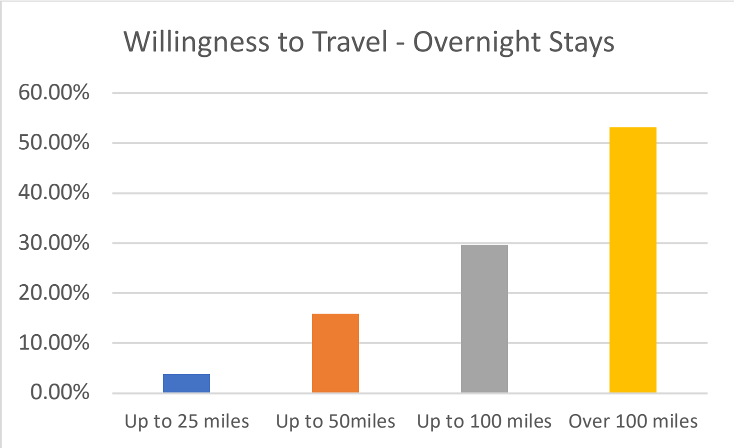
We notice that other people who visit our seaside village are less careful than local residents, especially young people / adolescents who rarely keep their distance in shops and on the pavement

Much more attention paid to public toilets and washroom stop offs at service areas, garages, public buildings, parks. I have never been very happy with the provision and state of many toilet facilities for many years. Now they are even more important. Many of our countryside facilities in car parks and visitor places are very poor. Only really good visitor centres and places like National Trust site have good enough facilities; not all are open. Garages and roadside cafes etc should be asked to improve the facilities for people, who are travelling past, as well as staff members, and should be more welcoming. Also in towns and cities, toilets need to be open and attended or regularly cleaned. Or cafes pubs should welcome people who just pop in when the need is there, not just if you buy something, for customers only.

Have only lived in Lancashire for 2 years and would love to get out and explore more. Also want to do what I can to support local businesses. But I am wary of going anywhere that might be overcrowded so will avoid the most popular tourist sites - at least for this year.

Willingness to travel was high with a third (32%) stating that they would travel over fifty miles for a day trip and 22.28% willing to travel up to fifty miles. As would be anticipated, willingness to travel further increased with overnight stays whereby over half (53%) would travel over 100 miles to their preferred destination and 29.64% would be willing to travel up to 100 miles.





3. Market Segment Analysis - Families

Various data subsets were analysed for comparative purposes with a particular focus on market segments / geography. Families are a key market segment for Lancashire; this includes multi-generational families as well as families with children of all age ranges and the following section examines the similarities and variances in opinions and behaviour between families and non-family groups.

3.1 Consumer Origins and Demographics

A total of 450 responses stated they were from a family group. This included those with children of any age as well as multi-generational families. The profile of family respondents was made up as follows, reflecting a growing pattern for holidays across multi-generations:

- Young families (children under 10 years) 34.22%
- Mixed families (some children under 10, some aged 11-15 years) 16.67%
- Older families (all children aged 11-15 years) 17.33%
- Multi-generational families (children, parents, grandparents) 31.78%

When comparing family and non-family groups, there is a slightly higher proportion of family respondents who live in Lancashire, 71.33% versus 54.75% for non-families.

Looking at respondents originating from outside of the county, a greater proportion of non-family groups were from the Northwest region, 23% compared to 16.88% of families. As with overall survey results, Greater Manchester received the greatest proportion of responses amongst both families and non-family groups. Other regional responses were generally similar, with a notable exception for Yorkshire whereby the proportion of families was lower (-2.41%), standing at 2.89% set against a response level of 5.30% amongst non-families. Overseas respondents were not significant accounting for around just 0.5% responses.

Within Lancashire, representation was highest across the same three districts (West Lancashire, Ribble Valley and Preston) for all types of respondents, albeit in a slightly different order with more family responses noted from the Ribble Valley, 17.87% (+6.74%) compared to 11.13% from non-family groups.

3.2 Visits to Lancashire Pre-Pandemic

Amongst those respondents originating from outside of the county, there was little change in the level of respondents who had previously visited Lancashire with 77.86% families having visited many times a year / before. This was on a par with the level of non-family groups. Just 1.53% families had never visited. Again, this level was the same as for non-family groups.

Visits to friends and family was still a key driver for both families and non-families (32.31% and 31.22% respectively). Similar levels of respondents (15.38% families; 16.70% non-families) stated that they visited solely for staying visits whilst day trips were more popular for families - 38.46% (+12.87%) versus 25.59% seen for non-family groups. Those who visit for both day and staying visits was lower amongst families at 39.23% (-12.68%), compared to over half, 51.91%, of non-families.

3.3 Influence of Lockdown on New Online Activity

The take up of new online activities and experiences during lockdown clearly reflect the move to home schooling for many families with almost two-thirds (61.86%) accessing educational resources from businesses, destination and venues, compared to just 21.17% of non-families. Other notable increases compared to non-families was ordering food from somewhere never ordered before (+11.22%) for over half of respondents at 52.56%. In general, the most popular activities were broadly in line across both groups and included live streaming of performances (34.88% families; 39.60% non-families) and cooking demonstrations (31.40% families; 27.77% non-families). Taking a virtual tour was less popular with families, accounting for 25.81% (-6.18%) of responses compared to 31.99% of non-family groups.

3.4 Intentions towards Future Trip Taking

As with overall survey results, when questioned about future trip intentions, both family respondents and non-families were split between those who can't wait to get out (39.11% families and 41.70% non-families) and a greater proportion who feel more cautious about taking unnecessary trips (57.78% families and 53.07% non-families). Just 4.67% families stated that they wouldn't be heading out anytime soon compared to 6.82% of non-family groups.

Focusing more specifically on the next 12 months, respondents were asked how they believed their trip taking behaviour may change in relation to day trips, overnight stays both domestically and overseas. Results in the table below highlight a slightly more cautious approach amongst families.

	Feel they would take more trips			Feel they would take less trips			No change / same number of trips		
	Families	Non-families	All responses	Families	Non-families	All responses	Families	Non-families	All responses
Day Visits (UK)	21.6%	25.8%	24.5%	38.9%	26.8%	30.1%	28.3%	37.2%	34.8%
Overnight stays (UK)	19.9%	21.5%	21%	38.2%	30.0%	32.2%	25.7%	31.8%	30.2%
Overseas Visits	4.3%	3.5%	3.7%	46.5%	44.3%	44.9%	15.5%	16.5%	16.3%

Around a quarter of families feel that there will be no change in the level of either day or overnight trips taken (28.3% and 25.7% respectively) although the cautious approach of families towards trip taking is clearly reflected in figures with a significantly greater proportion stating that they will take less trips this year. This pattern is aligned to other market segments such as couples as well as overall survey results and could potentially result in a net loss of day trips taken by families of -17.3% and for overnight trips -18.3%.

Attitudes towards overseas trips is very much aligned to other market segments and the reduction in travel abroad anticipated by families may offer some potential to raise consumer confidence and trip taking domestically once it is safe to do so.

3.5 Intentions Towards Future Trips to Tourism and Hospitality Venues

When asked about a range of venue types and how soon they believed they might visit once confinement and travel restrictions are lifted, results for both families and non-families were broadly in line with those seen when analysing all survey responses, with a clear propensity to visit outdoor parks / gardens and retail venues as soon as they were able. Over half, 56% of both families and non-families, would visit Parks and Gardens as soon as possible whilst 44.5% families and 45% non-families would visit Farm Shops / Deli / Food Halls. 35% families would also visit non-food retail shops or outlets as would a similar level (39%) of non-families. This also extended to markets with around one third, 31.9% families and 32.6% non-families, stating they would consider visiting as soon as they were able.

As with all consumers, the type of venues least appealing to both families and non-families were theme parks (9.9% and 5.4% respectively) and indoor cultural venues such as theatres (11.4% families / 15.3% non-families) and cinemas (13.4% families /13.9% non-families) whereby, in general, both groups do not intend to visit for some months after confinement is lifted.

Attitudes to eating out were very similar across both family and non-family groups and in line with total survey responses. Around a quarter of consumers were hoping to visit either a pub, café or restaurant as soon as possible. The majority, approximately one third, are planning to wait for a few weeks after confinement has ended and between 21-27% across both family and non-family groups, intend on waiting a few months before they visit.

A more cautious approach to overnight stays and guest accommodation was observed. Whilst just 17.7% of families said they would consider visiting a hotel / B&B as soon as confinement ends, this rose slightly to 21% amongst non-families. A similar level of response was seen for self-catering accommodation across both groups with 23.6% families and 22.7% non-families saying they would consider visiting once confinement is lifted. Camping / glamping and caravans were more variable with a higher proportion of families 22.6% (+6.5%) compared to 16.1% non-families who would consider visiting.

Interestingly, whilst a greater majority felt they would wait several weeks or even several months following the end of confinement to visit hotels and B&Bs, this was not necessarily the picture with self-catering accommodation and camping/glamping/caravanning options. This possibly reflects the fact that many of these establishments may be more rural based, incorporating a greater element of the outdoors and space to support social distancing.

	Would consider visiting once confinement is over			Would consider visiting a few weeks after confinement ends			Would not consider visiting until a few months afterwards		
	Hotel/B&B	Self catering	Camping, Glamping, Caravans	Hotel/B&B	Self Catering	Camping, Glamping, Caravans	Hotel/B&B	Self Catering	Camping, Glamping, Caravans
Families	17.7%	23.6%	22.6%	20.3%	26.9%	16.2%	35.3%	28.2%	16%
Non-families	21.1%	22.7%	16.1%	24%	21.2%	10%	30.3%	22.9%	9.9%

3.6 Intentions Towards Future Activities

The top activities that consumers are most likely to do once out of confinement showed a greater propensity for day trips amongst families, whether to an outdoor location, the coast or a visitor attraction:

- Going for a day trip to an outdoor location (68.67% families versus 58.89% non-families)
- Going for a day out to the coast (63.56% families versus 54.59% non-families)
- Going to a restaurant (42.89% families versus 48.27% non-families)
- Going to a visitor attraction (36.89% families versus 26.03% non-families)

Activities that were less popular amongst families compared to non-families included visiting towns (31.51% non-families versus 27.56% for families) and, perhaps not surprisingly, going to the pub (35.64% non-families versus 30.89% for families).

Activities that were least appealing to both groups were going to the cinema (just 15.11% families and 12.30% non-families would consider a trip) and visiting a spa (8% families and 5.39% non-families) or the gym (around 11% for both types of groups). Interestingly, there was some variance noted between attitudes towards public transport with just 6.89% families stating they would consider taking the train / bus when safe to do so compared to 12.64% non-family groups. It is not known whether this pattern may reflect general transport usage and patterns amongst groups pre-pandemic.

3.7 Safety Precautions and Measures in Tourism and Hospitality Venues

When it comes to the safety measures that consumers would want to see before frequenting a venue, opinions were very much in line with those seen overall. The following were rated very important or somewhat important by over 90% of respondents within both family and non-family groups:

- Sanitizing hand gels or wipes throughout the venue (note this fell just below 90% for non-families but was still ranked highly at 89.7%)
- Enforced social distancing
- Regulating entry to minimise number of people there at any one time
- Reassurance about cleaning/ sanitising commitments
- Controlled numbers in each area of the venue
- Measures in place to prompt social distancing (e.g. signage, staff)
- Enhanced cleaning regimes

Precautions such as clear guidance and information in advance for visitors was also popular and would be welcomed by over three-quarters of families (82.3%). A similar level (82.8%) also stated that other visible measures - 2 metre floor tape spacing and partitions would provide greater reassurance whereas face masks, temperature checks and cashless payments were seen as less important.

In line with overall survey responses, over half (average 56%) of respondents of families and non-families would like to see a national standard to demonstrate that businesses are implementing COVID-safe precautions and measures. Just over a third of non-families (37.35%) would be happy with a local standard whilst this rose to 44.20% amongst families.

3.8 Preferred Holiday Destination Types

When considering what type of holiday destinations respondents would prefer to visit over the next twelve months, the top destination types for both families and non-families aligned with overall survey results.

The most popular was rural coastline (65.92% families and 64.39% non-families) and the countryside or villages (59.91% families and 62.29% non-families), This was followed by traditional seaside town/resort for families (46.10% compared to 38.98% non-families), mountain or hills (39.42% versus 45.54% non-families) and harbour towns (34.74% versus 40.91% non-families).

Holiday centres were more significantly more popular (+17.42%) amongst families (22%) than non-families (4.63%) whilst heritage towns were less appealing to families (-15.49%) at 22% compared to 37.54% non-families. Other destination types with less appeal were large resort hotels (6.68%) and cities (14.03%). or holiday centre (7.20% and 9.25% respectively).

Willingness to travel was higher across non-family groups with a third (33.95%) of non-families stating that they would travel over fifty miles for a day trip compared to 26.85% of family respondents (a variance of +7.1%). Willingness to travel up to fifty miles was more aligned across groups – 23.49% for families and 21.90% for non-families. As would be anticipated, willingness to travel further increased with overnight stays whereby approximately half (49.66% families and 54.41% non-families) would travel over 100 miles to their preferred destination, with 34.61% families and 27.76% non-families willing to travel up to 100 miles.

In terms of perceived safety of venues and locations within destinations, most people would generally feel safe subject to compliance with any government / official guidelines. Consumers ranked the following types of venues and locations highest for perceived safety – parks and gardens (94.8% families and 93.8% non-families considered them somewhat or completely safe); small villages (92.4% families and 90.7% non-families) and small towns (85.4% families and 84.3% non-families).

Perceptions of safety were lowest for venues such as theatres (42.3 families and 38.6% non-families considered them somewhat or completely safe), cinemas (41.1% families and 36.5% non-families) and theme parks (45.7% families and 32.5% non-families).

4. Market Segment Analysis – Couples

4.1 Consumer Origins

Survey data was filtered to explore the attitudes and perceptions of various key market segments with this section focusing on couples. Completed responses for this market segment totalled 946 with just over half of respondents residing in Lancashire (55%) and a further 23.39% from the wider Northwest region, of which Manchester accounts for 11.64%.

Other responses come from a plethora of other UK regions, including Yorkshire 6.03%, Scotland 2.33% and the North East at just 1%. Responses stated as 'other' totalled 13.65% and were focused on a broad distribution from across the country; overseas respondents were not significant and accounted for approximately just 0.5% couples.

Within Lancashire, there was representation across all areas with West Lancashire (15.94%), Preston (11.22%) and Ribble Valley (11.02%) the highest and Pendle (2.56%), Hyndburn (3.15%) and Rossendale (3.15%) lowest amongst responses from couples.

4.2 Consumer Demographics

The age range of respondents was most commonly over 55 years, accounting for almost three quarters of couples. This would tend to reflect 'empty nesters' rather than pre-family couples with those aged below 35 years accounting for just 5.62% of responses amongst couples.

The table below provides a comparison between the age profiles of couples, non-couple respondents and all survey results.

Age Profile	Couples	Non-couples	All survey responses
16-24	0.74%	1.59%	1.10%
25-34	4.88%	8.07%	6.23%
35-44	4.56%	26.08%	13.74%
45-54	16.88%	24.21%	20.02%
55-64	34.93%	20.89%	28.94%
65-74	31.0%	14.84%	24.11%
75+	6.37%	3.17%	5.01%
Prefer not to say	0.85%	1.15%	0.98%

4.3 Visits to Lancashire Pre-Pandemic

Respondents originating from outside of the county were asked about their previous experience in making trips to Lancashire; in keeping with overall survey results, the majority of couples stated they had previously visited the county with over three-quarters having visited many times before or each year (combined total 77.91%) and just 1.14% of couples who had never visited Lancashire before.

Over half of couples stated that their primary trip purpose included both day and overnight trips (54.46%); whilst those who visited solely for day trips accounted for 23.34%. 15.79% had experienced overnight stays only. This reflects a slightly greater propensity amongst couples for overnight trips compared to non-couples whereby those travelling for either both day and overnight trips or just overnight stays totalled 58.19% versus 70.25% (+12%) of couples. Day trips were significantly higher amongst non-couples, standing at 36.48% versus 23.34% (-13.14%) for couples.

As with overall survey results and other market segments, visits to friends and relatives was a significant driver for almost one third (31.81%) of couples.

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4.4 Influence of Lockdown on New Online Activities

The inspiration to engage in new online experiences saw couples try a range of activities, the most popular (as with other market segments) was ordering a food delivery from somewhere never tried before (42%); live streaming or watching a previously recorded performance from a theatre, music or dance company (38.66%); taking a virtual tour (31.13%) and watching a cookery demonstration or making something a chef has made on social media (27.55%). Accessing educational resources and content from a business, destination or cultural venue was less popular amongst couples (20%) compared to 49.32% of non-couples and other market segments such as families (61.86%) who may use this to support home schooling.

'Other' online activities mentioned by couples include fitness and exercise classes, the use of Zoom for socialising and communicating with others, quizzes and online learning or crafts.

New Online Activities Experienced in Lockdown	Couples	Non-couples	All survey responses
Order a food delivery from somewhere never ordered before	42.01%	47.79%	44.42%
Live streaming or watching a previously recorded performance from a theatre, music or dance company	38.66%	37.75%	38.19%
Taking a virtual tour somewhere	31.15%	29.07%	30.18%
Accessing educational resources and content from a business, destination or cultural venue	20.02%	49.32%	32.68%
Watched a cookery demonstration or cooked something a chef has made on social media	27.55%	30.44%	28.81%
Other	25.58%	15.83%	21.46%

4.5 Intentions towards Future Trip Taking

The attitudes to getting back out and about following lockdown revealed a slightly higher level of caution amongst couples with 54% stating that they felt cautious about taking unnecessary trips if, and when restrictions allow. This compares to 41.25% who were keen to go out. The number stating that they would not go out at all stood at 6%.

Results were very much aligned to overall survey results.

In terms of how this influenced frequency of trips in the future, the following table sets out the propensity of couples towards day trips and overnight stays once lockdown ends.

	Feel they would take more trips			Feel they would take less trips			No change / same number of trips		
	Couples	Non Couples	All responses	Couples	Non Couples	All responses	Couples	Non Couples	All responses
Day Visits (UK)	25.4%	23.6%	24.5%	27.3%	33.9%	30.1%	37.2%	31.4%	34.8%
Overnight stays (UK)	21.7%	20.1%	21%	30.3%	27.9%	32.2%	31.8%	27.9%	30.2%
Overseas Visits	3.8%	3.6%	3.7%	44.2%	45.9%	44.9%	17.0%	15.1%	16.3%

A good proportion of couples feel that there will be no change in the level of either day or overnight trips taken with just over one third hoping to maintain the same level of day trips and just under one third hoping to maintain overnight trips.

However, there is some level of caution noted with the proportion of those who feel they will take less trips this year outweighing the level who felt they would take more trips, a pattern reflected amongst non-couples. This indicates a potential net loss of -1.9% day trips and -8.6% overnight stays amongst the couple's market.

Attitudes towards overseas trips by the couples segment is very much aligned to other market segments and the reduction in travel abroad may offer some potential to raise consumer confidence and trip taking domestically, once it is safe to do so.

4.6 Intentions towards Future Trips to Tourism and Hospitality Venues

When asked about a range of venue types and how soon they believed they might visit once confinement and travel restrictions are lifted, results for couples were broadly in line with those seen when analysing all survey responses, with a clear propensity to visit outdoor parks / gardens and retail venues as soon as they were able. Around half (54.8%) of couples would visit Parks and Gardens when confinement is lifted whilst 44.7% would visit Farm Shops / Deli / Food Halls. This is very much in line with non-couples (58% and 45% respectively).

38.6% couples would also visit non-food retail shops or outlets and 32.2% highlighted markets as a venue for visiting as soon as they were able.

As with all consumers, the type of venues least appealing to couples were theme parks whereby just 4.6% would consider a visit as soon as confinement ends and indoor cultural venues (theatres 15.1% couples and cinemas 12.9% couples). The greater majority (around a quarter) do not intend to visit these types of venues for some months after confinement is lifted. (It should be noted that a large proportion of couples responding stated that they don't tend to visit theme parks anyway – 68%).

With regards to food and drink establishments, just over a quarter of couples were hoping to visit either a pub, café or restaurant as soon as confinement ends. An average of 29%, just under one third, are planning to wait for a few weeks after confinement has ended and an average 21% of couples intend on waiting a few months before they visit. Results broadly correlate with those of non-couples. It is also worth highlighting some variance between this level of caution and the propensity for certain activities once it is safe to do so, whereby over half of couples stated they would go to a restaurant (50.53%) alongside 36.85% who would go to a pub / bar. For non-couples, this stood at 41.73% for a restaurant and 32.06% for a pub / bar.

A more cautious approach to overnight stays and guest accommodation was observed. Whilst 20.5% of couples said they would visit a hotel / B&B as soon as confinement ends, this rose slightly to 30.6% who stated they would prefer to wait several months before visiting. This follows a similar pattern of reservation for non-couples and other market segments.

The approach towards self-catering accommodation was more evenly split just under one quarter of couples considering visiting once confinement is lifted and a similar level choosing to wait either a few weeks or months before visiting. Again, this trend was repeated amongst non-couples. This possibly reflects the fact that many of these establishments may be more rural based, incorporating a greater element of the outdoors and space to support social distancing.

Camping / glamping and caravans were not the main accommodation choice for many couples with over half of respondents (56%) stating that they do not tend to use this type of accommodation; of those that would consider an overnight stay, 16% said they would be happy to visit once lockdown ends with a further 19.9% choosing to wait either a few weeks or months.

	Would consider visiting once confinement is over			**Would consider visiting a few weeks after confinement ends**			**Would not consider visiting until a few months afterwards**		
	Hotel/B&B	**Self catering**	**Camping, Glamping, Caravans**	**Hotel/B&B**	**Self Catering**	**Camping, Glamping, Caravans**	**Hotel/B&B**	**Self Catering**	**Camping, Glamping, Caravans**
Couples	20.5%	22.5%	16.0%	24.6%	21.6%	10.0%	30.6%	23.7%	9.9%
Non-Couples	19.6%	23.6%	20.4%	20.7%	24.3%	14.1%	33.1%	25.3%	14.0%

4.7 Intentions Towards Future Activities

The top activities that couples are most likely to do once it is safe to do were:

- Going for a day trip to an outdoor location (57.96% couples / 66.47% non-couples)
- Going for a day out to the coast (54.35% couples / 60.86% non-couples)
- Going to a restaurant (50.53% couples / 41.73% non-couples)

Going to the pub and taking a day trip to a town were also popular amongst couples (36.85% and 32.06% respectively). A key notable difference was the propensity for a day trip to a visitor attraction with 26.33% couples versus 32.66% non-couples (-6.33%) considering a visit and reflecting the greater popularity of visitor attractions for other key market segments, most notably families.

Activities that were least appealing to couples followed trends noted across all survey results with just 4.67% favouring a trip to a spa and 12% a trip to the cinema. Taking a train or bus trip was also low with just 12% considering using public transport. This may, however, simply reflect general transport usage and patterns pre-pandemic whereby the main mode of transport for visitors is frequently noted to be by car.

4.8 Safety Precautions and Measures in Tourism & Hospitality Venues

When it comes to the safety measures that consumers would want to see before frequenting a venue, the opinions of couples were very much in line with those seen overall. The following precautions were rated very important or somewhat important by over 90% of respondents within both couples and non-couple segments:

- Sanitizing hand gels or wipes throughout the venue
- Enforced social distancing
- Regulating entry to minimise number of people there at any one time
- Reassurance about cleaning/ sanitising commitments
- Controlled numbers in each area of the venue
- Measures in place to prompt social distancing (e.g. signage, staff)
- Enhanced cleaning regimes

Precautions such as clear guidance and information in advance for visitors and other visible measures - 2 metre floor tape spacing and partitions, face masks, temperature checks and cashless payments were seen as less important although a fair proportion (just under three-quarters) did state that some guidance on social distancing measures pre-visit would be welcomed – 72% for couples and 79% non-couples.

There was no difference between overall survey responses and other key market segments in the desire for a national standard with over half (average 56%) of couples and also, non-couples, in support of this. Just over a third of couples (37%) would be happy with a local standard; this was on a par with families although a local standard generated slightly further support (41.85%) when looking at all non-couple segments. Some couples commented that the absence of any standard would not stop them visiting although could provide extra reassurance to some.

4.9 Preferred Holiday Destination Types

When considering what type of holiday destinations respondents would prefer to visit over the next twelve months, the top destination types for couples were rural coastline (64.48%) and the countryside or villages (62.99%), followed by mountain or hills (46.02%), harbour towns (41.46%), traditional seaside town/resort (39.66%), and heritage towns (37.43%). Destination types with the least appeal were large resort hotels or holiday centre (7.64% and 4.03% respectively).

Rankings are broadly similar to non-couples although couples showed a greater propensity for mountains or hills (+5.1%) and heritage towns (+9.76%).

Willingness to travel was slightly higher amongst couples than non-couples although any variances were not significant. Around a third (33.90%) of couples stated that they would travel over fifty miles for a day trip; this compares to 29.42% of non-couples. Willingness to travel up to fifty miles was more aligned across groups, 22.99% for couples and 21.45% for non-couples. As would be anticipated, willingness to travel further increased with overnight stays whereby approximately half (54.64% couples and 51.02% non-couples) would travel over 100 miles to their preferred destination with a further 28.5% couples and 31.20% non-couples willing to travel up to 100 miles.

In terms of perceived safety of venues and locations within destinations, most people would generally feel safe subject to compliance with any government / official guidelines. Consumers ranked the following types of venues and locations highest for perceived safety – parks and gardens (93.6% couples and 94.7% non-couples considered them somewhat or completely safe); small villages (90.6% couples and 91.9% non-families) and small towns (83.4% couples and 86.3% non-couples).

As with overall results, perceptions of safety were lowest for venues such as theatres (37.5% couples and 42.4% non-couples considered them somewhat or completely safe), cinemas (34.7% couples and 41.9% non-couples) and theme parks (31.4% couples and 42.6% non-couples).

5. Market Segment Analysis - Respondents External to Lancashire

5.1 Consumer Origins

When survey data is filtered to explore the attitudes and perceptions of those living outside of Lancashire, there is a marked increase in the proportion of respondents from the Northwest region, accounting for over half of all responses (51.61%) set against a total of 686 respondents. The greatest level of responses were from Greater Manchester, totalling around a quarter of all respondents.

Yorkshire accounts for around 11% respondents from outside Lancashire, Scotland 4.81% and the North East just 2.48%. Responses stated as 'other' totalled 30.47% and included a plethora of UK regions; overseas respondents were not significant and accounted for 1.6% consumers from outside of the county.

5.2 Consumer Demographics

The age range of respondents from outside of Lancashire was most commonly over 55 years, accounting for over two thirds of responses. 7.34% were aged 75+ followed by 32.60% aged 65-74 years and 30.84% were aged 55-64. This tends to be reflective of the most common market segment amongst respondents whereby nearly two thirds (63.93%) were couples. Families (including multi-generational families) accounted for under a fifth of respondents from outside of the county at 19.21% whilst 9.68% described themselves as solo travellers and 4.55% who travelled within groups of friends.

Compared to overall survey results and those respondents who reside within Lancashire, this age profile includes a greater proportion of older respondents, particularly aged 65+ years and couples.

Age Profile	Consumers external to Lancashire	Consumers living in Lancashire	All survey responses
16-24	0.44%	1.65%	1.10%
25-34	2.64%	8.66%	6.23%
35-44	8.96%	17.01%	13.74%
45-54	16.30%	22.68%	20.02%
55-64	30.84%	27.42%	28.94%
65-74	32.60%	18.25%	24.11%
75+	7.34%	3.51%	5.01%
Prefer not to say	1.03%	0.93%	0.98%

Party Type	Consumers external to Lancashire	Consumers living in Lancashire	All survey responses
Solo travellers	9.68%	5.04%	6.95%
Couples	63.93%	53.50%	57.65%
Young family (children under 10 years old	4.25%	12.96%	9.38%
Mixed family (some children under 10, some aged 11-15)	2.79%	5.76%	4.57%
Older family (all children 11-15 years old)	3.52%	5.56%	4.75%
Multi-generational (children, parents, grandparents)	8.65%	8.74%	8.71%
Friends	4.55%	5.76%	5.30%
Other	2.64%	2.67%	2.68%

5.3 Visits to Lancashire Pre-Pandemic

Respondents originating from outside of the county were asked about their previous experience in making trips to Lancashire; the majority stated they had previously visited the county with over three-quarters having visited many times before or each year (combined total 78%) and just 1.75% had never visited Lancashire before.

Almost half stated that their primary trip purpose included both day and overnight trips (49.63%); whilst those who visited solely for day trips accounted for just over one quarter at 28% of consumers. 16% had experienced overnight stays only. These results align with wider overall survey results. As with other key market segments, visits to friends and relative was a significant driver for almost one third (31%).

5.4 Influence of Lockdown on New Online Activities

The inspiration to engage in new online experiences saw respondents try a range of activities, the most popular being ordering a food delivery from somewhere never tried before (41.10%); live streaming or watching a previously recorded performance from a theatre, music or dance company (40.47%); taking a virtual tour (37.95%) and accessing educational resources and content from a business, destination or cultural venue (30.8%).

Although top activities are broadly similar to overall survey results, there is some slight variation noted when compared to respondents living in Lancashire. For example, cookery demonstrations / cooking something a chef has made on social media was something almost a third of Lancastrians (31%) had tried compared to just a quarter of those living outside of the county (25.67%). However, virtual tours were more popular for those external to Lancashire at 37.95% compared to just 24.69% of those living within Lancashire.

New Online Activities Experienced in Lockdown	Consumers external to Lancashire	Consumers living in Lancashire	All survey responses
Order a food delivery from somewhere never ordered before	41.10%	46.83%	44.42%
Live streaming or watching a previously recorded performance from a theatre, music or dance company	40.47%	36.48%	38.19%
Taking a virtual tour somewhere	37.95%	24.69%	30.18%
Accessing educational resources and content from a business, destination or cultural venue	30.80%	34.93%	32.68%
Watched a cookery demonstration or cooked something a chef has made on social media	25.67%	31.03%	28.81%
Other	21.26%	21.69%	21.46%

5.5 Intentions towards Future Trip Taking

The attitudes to getting back out and about following lockdown were more evenly split amongst respondents from outside of the county with 47.74% who were keen to go out and 47.45% who felt more cautious. This shows a slight increase (+6%) of those keen to go out when compared to overall survey results. The number stating that they would not go out at all showed no change at 6%.

By comparison, Lancashire residents were somewhat more cautious about trip taking with 58.70% (+11.25% compared to those living outside of Lancashire) somewhat concerned about making unnecessary trips. Just over one third, 36.97%, (-10.77% versus those living outside of Lancashire) could not wait to get out whilst there was no real change in the level who were not keen to go out at all, standing at 5.87% for those living in Lancashire.

In terms of how this may influence the frequency of trips in the future, the following table sets out the propensity to consider day and overnight trips once lockdown ends.

	Feel they would take more trips			Feel they would take less trips			No change / same number of trips		
	External to Lancs	Living in Lancs	All responses	External to Lancs	Living in Lancs	All responses	External to Lancs	Living in Lancs	All responses
Day Visits (UK)	27.7%	22.3%	24.5%	25.3%	33.1%	30.1%	36.2%	33.9%	34.8%
Overnight stays (UK)	24.1%	18.6%	21%	28.5%	34.7%	32.2%	32.9%	28.5%	30.2%
Overseas Visits	3.6%	3.8%	3.7%	42.9%	45.8%	44.9%	16.8%	16.1%	16.3%

The day visits market amongst visitors from outside of the county offers some positive signs of recovery with any intentions to take less day trips offset by over a quarter of respondents from outside of Lancashire keen to undertake more day trips than they might otherwise have done, with the potential for a slight net gain during the next 12 months (+2.4%).

However, any potential net gain in the day visitor market may be offset by wider results. When responses by those living in Lancashire are taken into account; this reflects the more cautious approach of Lancastrians whereby a much great proportion of respondents stated they let they would take less day trips rather than more (33.1% versus 22.3% respectively – a potential net loss of 10.8% in volume of day trips by people living in the county). Overall, this could have the potential net loss of 5.6% identified across all survey responses.

Unfortunately, overnight visits have the potential to suffer some net loss. For those external to the county, this had the potential for a net loss of 4.4% in trips and for those living in Lancashire, the difference is much more marked, with a potential net loss of 16.1%. Overall survey results suggest the net loss in overnight stays could potentially be up to 11.2%.

Across all respondents, there is a propensity to take less trips overseas which may offer some potential to encourage more domestic trips providing that consumer confidence can be grown further when it is safe to do so.

5.6 Intentions towards Future Trips to Tourism & Hospitality Venues

As with overall survey results, parks and gardens were most favoured as a venue to visit once confinement is lifted (54.2%). Retail was also strongly favoured with 45.5% stating that they would visit farm shops / deli / food halls, whilst 39.6% stated that they intended to visit non-food retail shops and 32.8% mentioned they would go to a market when confinement ends. Results were broadly similar to those living in Lancashire.

Interestingly, one third (33.2%) stated that they would visit a cafe as usual once confinement ends yet were slightly more reserved towards restaurants (29.7%) and pubs (24.7%) and a slightly higher majority expressing a preference to waiting a few weeks before visiting. A similar pattern in attitudes towards food and drink establishments was noted amongst Lancastrians with slightly more reservations noted and a propensity towards visiting after a few weeks or months.

In line with Lancashire residents and overall survey results, the least appealing types of venues that consumers would visit when confinement is lifted were cinemas (15.1% those living outside of Lancashire; 13% Lancastrians) and theatres (16.5% those living outside of Lancashire; 12.7% Lancastrians). Over a quarter (27%) of consumers from outside of the county stated that they would wait several months after confinement before considering a trip to both types of venues; a level that was reflected by residents of Lancashire. Theme parks also fared less favourably with just 5.7% stated they would visit a theme park once confinement ends; a further 8% stated they would wait some weeks and an additional 12.5% would wait several months; however it should be noted that almost two thirds (62.5%) of respondents from outside the county stated they would not usually visit this type of venue anyway. For those living in the county, visiting a theme park was also a low priority with 7.6% stating they would visit once they were able to do so whilst 14.1% would wait a few months to do so (note that over half, 57.2%, stated they do not usually tend to visit this type of attraction).

Focusing primarily on overnight stays from potential visitors living outside of the county, attitudes towards overnight stays in guest accommodation were mixed. Whilst 21.2% stated they would consider staying in a hotel / B&B once lockdown ends, the greater majority (30%) stated that they would probably wait several months before doing so. Concerns appeared somewhat lower amongst those who would consider self-catering, camping / glamping and caravanning options, possibly reflecting the ease for maintaining social distancing and concerns around shared / common touch points such as bathrooms, bedding, etc.

Attitudes of those living outside of Lancashire towards stays in guest accommodation	Not applicable as I don't go to this type of venue	As soon as travel confinement is over / as I normally would	Not until a few weeks after confinement is over, assuming no second wave	Not until a few months after confinement is over, assuming no second wave
Hotel / B&B	4.7%	21.2%	25.3%	30.0%
Self-Catering Accommodation	18.2%	23.0%	23.6%	22.8%
Camping / Glamping / Caravanning	53.1%	17.9%	11.1%	11.0%

5.7 Intentions Towards Future Activities

When asked what activities they would most likely do once it is safe to do so, consumers external to Lancashire ranked a trip to an outdoor location or the coast highest, 62.81% and 58.71% respectively. Interestingly, 43% stated they would go to a restaurant despite a significantly lower proportion (29.7%) in the previous question stating that they would visit once lockdown ends and the greater majority (almost half) intending to wait either a few weeks or months before visiting.

A similar pattern was noted amongst those living in Lancashire with a slightly greater level of intent for visiting restaurants and pubs once it is safe to do so.

Top Activities most likely to be done once it is safe to do so	External to Lancashire	Living in Lancashire	All Survey Results
Going on a day trip to an outdoor location	**62.81%**	**60.49%**	**61.57%**
Going for a day out to the coast	**58.71%**	**55.56%**	**57.0%**
Going to a restaurant	**43.0%**	**49.79%**	**46.77%**
Going to a pub / bar	**30.31%**	**37.18%**	**34.35%**
Going for a day out to a town	**33.24%**	**28.60%**	**30.45%**

Activities least favoured were very much in line with overall survey results and other consumer segments; using public transport for a train or bus ride received just 17.13%

responses from those consumers living outside of Lancashire whilst those likely to consider a trip to the cinema totalled 11.57%; the gym 9.81% and those who would consider a spa trip just 4%.

Common themes amongst respondents who specified other activities included visiting friends and relations (VFR) and going caravanning.

5.8 Safety Precautions and Measures in Tourism & Hospitality Venues

Compared to other survey responses, there was no significant variation in opinions about safety measures that consumers would want to see before frequenting a venue, although average rankings were slightly higher amongst Lancastrians for those measures linked to cleaning and the use of hand sanitiser. Again, this perhaps reflects the slightly more cautious approach to trip taking by Lancashire's residents compared to those external to Lancashire. However, overall, attitudes were very much in line with those seen across all survey results with the following rated very important or somewhat important by over 90% of consumers:

Safety Precautions	External to Lancashire	Living in Lancashire	All Survey Results
Sanitizing hand gels or wipes throughout the venue	88.6%	92%	90.7%
Enforced social distancing	90.0%	91.4%	90.9%
Regulating entry to minimise number of people there at any one time	92.1%	92.9%	92.8%
Reassurance about cleaning/ sanitising commitments	92.0%	93.7%	93.1%
Controlled numbers in each area of the venue	92.6%	93.6%	93.3%
Measures in place to prompt social distancing (e.g. signage, staff)	90%	91.3%	90.8%
Enhanced cleaning regimes	92.8%	94.9%	94.2%

Visible measures such as 2 metre floor tape spacing and partitions were also ranked highly with over three-quarters (average of 81%) of those from outside of Lancashire keen to see this in place. Daily health checks for staff were also considered very or somewhat important by three-quarters of respondents (average of 74%). Similar levels of importance were attributed to the provision of clear guidance for potential visitors on social distancing measures before arrival (either online / social media / by telephone) whilst precautions such as other, face masks, temperature checks for visitors and cashless payments were seen as less important.

In line with overall survey responses, over half (average 56%) of respondents would like to see a national standard to demonstrate that businesses are implementing COVID-safe precautions and measures. When it comes to the potential for a local standard, there was slightly more support (+4.63%) from Lancashire residents (41.19%) than those external to the county (36.56%) although how this would work in practice was questioned by consumers who felt that being able to see any visible precautions on site provided a good level of reassurance.

5.9 Preferred Holiday Destination Types

Willingness to travel was high amongst those respondents residing outside of Lancashire with 41% willing to travel over 50 miles for a day trip and a further 21.91% willing to travel up to 50 miles. As would be anticipated, willingness to travel further increased with overnight stays whereby over half (59.88%) would travel over 100 miles to their preferred destination and a further 29.12% would travel up to 100 miles.

The top destination types that respondents would prefer to visit over the next twelve months were countryside or villages (65.25%) and rural coastline (64.96%). These were followed by mountain or hills (46.77%), traditional seaside town/resort (45.16%, harbour towns (44.13%) and heritage towns (41.50%). Countryside or villages, traditional coastal/seaside town were also the top preferences for a UK short break or holiday seen in a national survey conducted by VisitBritain although a key variation seen nationally was for the desire for visiting a city or large town. (VisitBritain Consumer Sentiment Tracker 1 June 2020).

Destination types with the least appeal to those residing outside of Lancashire were (as with other survey respondents) large resort hotels or holiday centre (6.45% and 7.92% respectively).

Preferred Destination Types (Top 5 rankings)	External to Lancashire	Living in Lancashire	All Survey Results
Rural Coastline	64.96%	64.78%	64.80%
Countryside and Villages	65.25%	59.01%	61.71%
Mountains or Hills	46.77%	42.02%	43.78%
Traditional Seaside Town / Resort	45.16%	38.21%	40.98%
Harbour Towns	44.13%	35.94%	39.21%
Heritage Towns	41.50%	27.70%	33.29%

Although preferred destination types were broadly aligned, there was a greater desire amongst non-Lancashire residents to visit heritage towns (41.50%) compared to Lancashire residents (27.70%) and overall survey results (33.29%). This pattern was also noted for harbour towns (44.13% versus 35.94% for Lancashire residents and 39.21% overall) and traditional seaside towns / resorts (45.16% versus 38.21% for Lancashire residents and 40.98% overall).

In terms of perceived safety of venues and locations within destinations, most people would generally feel safe subject to compliance with any government / official guidelines. Consumers external to Lancashire ranked the following types of venues and locations highest for perceived safety – parks and gardens (93% considered them somewhat or completely safe); small villages (89.7%) and small towns (84.6%). Respondents perceived theatres, cinemas and theme parks the least safe with just 38.6%, 36.1% and 32.5% of consumers respectively considering to be somewhat or completely safe.

In general, the highest and lowest rankings correlate with those made by other segments although interestingly, perceptions towards guest accommodation did not always support people's intent to want to visit. Despite a total of 64.9% consumers feeling that hotels / B&B's were either completely or somewhat safe, many – almost one third – stated that they would not consider visiting until a few months after lockdown ends. Similarly, despite three –

quarters of respondents (75.4%) feeling that self-catering accommodation would be safe or somewhat safe, this fell to less than a quarter (23%) who would visit once confinement is over and almost half (46.4%) who would wait to visit this type of accommodation either some weeks or months thereafter. A similar pattern was noted for camping, glamping and caravanning with higher levels of perceived safety compared to intent to visit.

Attitudes towards guest accommodation – external to Lancashire	Feel completely safe	Feel somewhat safe	As soon as travel confinement is over / as I normally would	Not until a few weeks after confinement is over	Not until a few months after confinement is over
Hotel / B&B	17.7%	47.2%	21.2%	25.3%	30.0%
Self-Catering Accommodation	27.1%	48.3%	23.0%	23.6%	22.8%
Camping / Glamping / Caravanning	21.3%	35.6%	17.9%	11.1%	11.0%

There was also little correlation between perceptions about the safety of food and drink venues and the level of intent to visit establishments. Although two-thirds perceived cafes to be somewhat or completely safe, only one-third would visit as soon as lockdown ends with the majority (47.8%) preferring to wait a few weeks or months. Similarly, despite 64.1% perceiving restaurants to be somewhat or completely safe, and an estimated 43% choosing a restaurant visits as one of their top activities once it is safe to do so, the level who visit once lockdown ends fell to 29.7% with around half of consumers stating they would wait either a few weeks or months before a visit.

Attitudes towards food and drink establishments – external to Lancashire	Feel completely safe	Feel somewhat safe	As soon as travel confinement is over / as I normally would	Not until a few weeks after confinement is over	Not until a few months after confinement is over
Cafes	16.2%	50.3%	33.2%	29.5%	18.3%
Restaurants	15.3%	48.8%	29.7%	30.0%	19.8%
Pubs	13.4%	36.7%	24.7%	26.6%	20.3%

6. Conclusion

The overall results of this survey highlight a number of common perceptions and attitudes amongst consumers with regards to future trip taking following the end of the COVID confinement period. These have a number of implications for Lancashire's visitor economy and its path to recovery post-pandemic. The potential for a boom in domestic tourism following international travel restrictions is not necessarily guaranteed and, like many destinations, for Lancashire, business challenges around reduced operating capacity and seasonality, means the sector is focused on surviving the next twelve months and developing a longer term roadmap for sector recovery.

Raising consumer confidence will be vital in encouraging tourism leisure trips. There is a clear split between those consumers who cannot wait to get out again following lockdown (41%) and those who are more cautious about doing so (54%) with slightly higher levels of concern seen amongst families and those living in Lancashire. Survey results indicate a potential net loss in day trips of -5.6% and overnight stays of -11.2% to Lancashire. The propensity for consumers to take less overseas trips during the next twelve months may offer an opportunity to negate this loss by encouraging more domestic trips, providing that consumer confidence can be raised when it is safe to do so.

When asked what activities people would most like to do once it is safe to do so, top experiences were taking a day trip to the coast or an outdoor location, followed by dining in a restaurant and visiting a pub. Visitor attractions were also a key driver for families. Similarly, in terms of preferred holiday destination types over the next twelve months, the rural coastline, countryside and villages, mountains and hills were top considerations by respondents. With 137 miles of natural coastline and 80% rural geography, boosting a quality food and drink offer, a variety of outdoor and family attractions, Lancashire is well placed to respond.

When asked specifically about the type of venues they would visit and intended timescales for doing so, outdoor locations, parks and gardens were ranked highest and most likely to be visited soon after confinement. Indoor cultural venues and taking a train / bus trip were less favoured across consumer segments and are likely to require extra support in restoring consumer confidence. Activities generally reflect the perceived level of safety within different venues types whereby outdoor locations and attractions were ranked highest. There was some variance noted in attitudes towards food and drink establishments whereby, despite consumers keenness to visit venues, there were notable concerns about safety with many stating that they would wait several weeks or months before visiting after confinement ends. Support for Lancashire's food and drink venues in raising consumer confidence would also therefore be of benefit.

There is an opportunity to support the day visitor market as people start to make more trips and although Lancashire is well placed to provide a range of quality accommodation options for those who might be encouraged to stay overnight, it must provide the reassurance that consumers seek in terms of safety. Attitudes towards guest accommodation see a higher level of caution amongst consumers towards serviced accommodation with more visitors preferring to wait a few weeks or months before visiting. Attitudes towards self- catering, camping and caravanning is less pronounced, possibly reflecting the greater ease with which measures such as social distancing can be applied on site as well as the propensity towards rural and coastal locations whereby these accommodation types are readily found.

Indeed, safety was a top priority for consumers with strong opinions voiced about the type of precautions and safety measures they would like to see in place, with an emphasis on enhanced cleaning regimes, social distancing, hand sanitiser and controlled entry / numbers of customers. Support for a national COVID standard was high and VisitBritain's introduction of a self-regulating industry standard 'We're Good to Go' in June will be of benefit in this respect. Uptake amongst Lancashire's tourism and hospitality businesses should be encouraged. Alongside a concerted national consumer promotional campaign and the Government's Test and Trace system, this offers the opportunity to regain consumer confidence.

Marketing Lancashire is the agency charged with promoting the county on a national and international stage and is the official Destination Management Organisation (DMO) for Lancashire. The agency also provides marketing and communications support to the LEP.

Our activities in marketing and communications, commercial membership and place marketing are focused on promoting sustainable economic development and growth; raising the profile of Lancashire as a leading leisure, learning and business destination for domestic and international visitors #WeAreLancashire

Lancashire attracts 68.74 million visitors annually, who contribute £4.41 billion to the local economy and help support almost 61 thousand jobs. Visit Lancashire is the tourist board for the county and a division of Marketing Lancashire.

For more information go to MarketingLancashire.com or follow @MarketingLancs @VisitLancashire