VisitBritain Day Visits Survey 2008

Background & Methodology

The National Day Visits surveys were carried out by Arkenford on behalf of VisitBritain and Tourism South East, with fieldwork taking place in 3 waves spanning August 2007 – February 2008 and using an online methodology. Over 5,000 responses were collected for a representative cross-section of the population.

Unlike historical day visits research, the aim of this research was not to measure volume and value of day visits. Instead, it was identified that research was needed to further understand trends within day visits, establish what makes up the competitive set and enable better and more efficuent marketing.

Days out are in direct competition with “at home” leisure activities

Days out are much rarer events when compared with popular home based pastimes, such as watching TV/DVD/Video (three-quarters do this every week), surfing / chatting online (two-thirds do this every week) or reading a book for pleasure (half do this every week).

Six different leisure activity groups can be defined by their in-home leisure activities

- Online recreationalists – focus on online activities over books / creativity
- Home entertainers – primarily women, active online but also into books
- Young socialisers – enjoy leisure activities and socialising at home
- Readers – read books but don't spend much time online (generally older)
- Creative hobbyists – enjoy creative artistic / musical activities and hobbies (mostly women)
- Inactive at home – low activity rates for any of the at-home activities listed

In comparison to the high incidence of "at home" activities, the most frequent "day out" activity is "undertaking a leisure activity" (likely to be walking), with only a quarter of people surveyed doing this every week. A further fifth of people "participate in a hobby (out of home)" (compared with over a third who participate in home based hobbies).

There is however a diverse pool of activities that more than half of those surveyed do at least 3 or 4 times per year, including: visiting tourist attractions (approximately 58% do this at least 3 or 4 times per year), entertainment (e.g. theatre, cinema), a general day out, a special shopping trip, pursuing hobbies and other leisure activities.

The current profile of day-trippers is dominated by the Cosmopolitan Segment, younger rather than older people and those in more “social” life-stages (families, house-shares). Income level plays an obvious role.

Looking at the proportion of people who undertake certain day trip activities at least once per month, we see that of the 8 ArkLeisure Segments, Style Hounds and Cosmopolitans are the most active.

Cosmopolitans in particular show interest in every kind of day out listed and are twice as likely as most other groups to attend a special event (e.g. festival, exhibition). Being the highest income group, these are also the most valuable visitors to attract.

Participation in the listed activities clearly declines with age. Life-stage also plays a key role, with those living with others as a family or house-share being more active than those living alone or with a partner.

Increased activity is also clearly (and understandably) related to income – providing the means to go out. There is little differentiation by gender although men are slightly more active in relation both watching and participating in sport.

The sorts of activities most likely to take place outside the "usual environment" of a respondent in the past 3 months are visiting tourist / visitor attractions, going on a general day out, attending a special event and going to the beach / seaside

This definition is important as it helps to estimate which day out activities generate additional inbound tourism income for the area. Taking all of these "tourism trips" together, over half are made up of just 4 activities: "going on a special shopping trip" (15%), a "leisure activity" (likely to be walking) (13%), a "general day out" (13%) and a "night out" (12%).

The most popular kinds of day trip are going for a walk, a bit of general exploration, a trip to the beach/seaside and shopping

The ArkLeisure Segments have clear preferences reflective of the kinds of personalities we tend to find in these segments e.g. Style Hounds seek nights out / shopping / clubbing, Traditionals look for heritage and Discoverers have a divergent mix of interests across all categories.

Younger people look for nights out, theme parks and sporting activities while older people favour gardens, stately homes, churches etc. Watching sporting events is clearly male dominated.

Family circumstances also influence the types of day trips people are interested in i.e. children increase the propensity to seek out theme parks, zoos and beaches etc.

What people do in their "at home" leisure time also correlates with their preferences for days out e.g. the Creative Hobbyists are also interested in historic pursuits, arts trips and museums.

Heritage attractions are the most popular types of visitor attractions e.g. National Trust, cathedrals, historic sites and castles

Each of the 17 types of visitor attraction asked about in the research is visited by at least 30% of people at least once per year – rising to over 50% for the heritage types of attractions.

These types of attraction have universal appeal to all ArkLeisure segments except for Style Hounds, who are more interested in theme parks (unsurprisingly as this group is the youngest of all the segments).

Shopping is an important and lucrative component of most day trips (over half of trips included some kind of shopping) – and a massive part of attraction income – even if not the main purpose of the trip, most people will buy something while out

In addition to shopping whilst on day trips generally, over 60% of people take a shopping day out to an unusual place (i.e. versus their local amenities) – i.e. "tourist shopping" – at least 3 times a year. As you might expect, women enjoy shopping more than men!

Overall people prefer city centre shopping but big shopping centres are very popular amongst higher spending groups. Shopping environments can be clearly targeted by the ArkLeisure Segments e.g. Style Hounds like city centres and big shopping centres, Discoverers are keen on car boot sales, Traditionals enjoy market towns and Functionals go for value bargains at the market.

For over half of day trips people don't use information sources – they just go (especially where the destination is familiar / local) with word of mouth the main source used

The most used source is recommendations from family and friends, with a quarter of people quoting this. Website for specific attractions and websites of a tourist office are the most used "official" sources – with around 1 in 10 people using them. This is particularly key for special events, where people are likely to go online to purchase tickets.

Just less than two-thirds of people plan their trip at least one week in advance, but over a third just go on the spur of the moment.

Most people on a day trip to a specific region live in that same region or a neighbouring region, and activities undertaken are dependent on the particular offerings of a specific region

In general the flow is from population centres to less populated areas. Those regions possessing both types (e.g. the North West with Liverpool / Manchester AND Cumbria / Lakes) tend to be the most self-contained.

Obviously the type of day trip activity that a destination attracts depends on what a destination has to offer, i.e. London attracts those seeking to attend special events / entertainment, the South West attracts beach-lovers and Wales is popular with activity trip (e.g. walking, cycling) seekers.

A quarter of day trips are simply prompted by a desire to do something different / have a change of scene

The weather is also an important prompt – suggesting a spur of the moment decision – particularly when related to trips to the beach, walking/cycling, hobbies or general exploration of an area. More planned visits are those involving tourist/visitors attractions, special events or sports events.

The first priority for a good day out is simply an "enjoyable experience" – a pleasant place to be (location) combined with good local food and drink

Over a third of people are looking for lots of things to do, a new experience or something out of the ordinary –more active motivations. A third group of priorities (for around a quarter of people) are good shopping, live performances and a bit of culture.

As you might expect, older segments are more interested in a more sedate experience (peace and quiet, something nostalgic) and the younger in a more stylish / cool and a "thrilling experience"

Almost half of respondents strongly agree that having a day out "creates good memories" or " refreshes them"- indicating that more can be done to convince the other half! The expense of a day out is the greatest perceived barrier – with a quarter of respondents agreeing that it discourages them from going on day trips

There is a high degree of correlation between recognition of the barriers and lack of activity – indicating that it is barriers rather than low recognition of benefits that is deterring people. Families with children are most likely to be discouraged to go on a day trip because of the expense that is involved, and are also the group who lack the time to go because of household chores.

Income clearly has a strong impact on propensity to take days out.

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