Visit Britain Day Visits Survey

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Executive Summary

Going on a day out is only one possibility for a person to spend their free time and days out are therefore competing with other leisure activities for people's free time and money.

Activities in the home (e.g. watching TV, surfing online, reading etc) are done a lot more frequently than activities out of the home. A significant proportion of respondents are doing home activities every week, which means that these command a significant amount of time – time which could instead be used on going out. However, there is a diverse list of activities that more than 50% of the population do at least 3 or 4 times a year, including:

- visiting tourist attractions;
- attending an entertainment (theatre/cinema etc);
- going for general day out;
- going on a special shopping trip and
- pursuing hobbies and other 'leisure activities'.

This clearly shows that day trips do have a place in the overall leisure mix.

The majority of people see the benefits of going on a day out and think that a day out can refresh and creates good memories. However, there is still a large proportion of the population whose attitudes towards going on day trips are either neutral (e.g. High Streets and Followers) or negative (Functionals and Habituals) and there is therefore a considerable task to be done to convince more people of the positive benefits of a day out rather than doing a home activity.

In order to be able to attract day visitors effectively, destinations need to gain an understanding about:

- who is interested in the destination/type of destination and what the destination has to offer and therefore would consider visiting or has visited already
- what needs to be changed in the destination in order to attract new types of visitors
- What prevents people from going on day trips and what are the motivators for a day out
- What information sources are used by different visitor groups so marketing activity can be focussed effectively

Factors which are important for a destination to gain an understanding of the above include:

- The type of day trip activity which a destination attracts is influenced a lot by what a destination has to offer. For example, the South West with its stretches of beach is more likely to attract visitors who want to spend time on the beach.
- Who people go with on a day trip also influences the activities that are done. Friends tend to do more planned/purposeful things; sports, nights out and hobbies/ spa trips. Families form a bigger component of those going to the beach, a tourist attraction or a sports event
- People of different ages and living in different circumstances are looking for different things from a day out. Having some peace and quiet for example is a lot more important to older people while having lots to do is important to the younger age groups.
- The different Arkleisure segments also show clear preferences as to what they expect from a day trip:
    - Style Hounds and Followers want good shopping facilities
    - "a bit of culture" features on the Cosmopolitans', Traditionals' and Functionals' list of things they are interested in doing, along with something educational

  - Traditionals also look for a nostalgic experience
  - Discoverers are especially interested in a new experience and want to be able to do lots of things
  - Habituals are very interested in peace and quiet and an attractive setting
- These different preferences are reflected in the types of attractions chosen by the different Arkleisure segments on past day trips – Traditionals are more likely to select Historic Castles and Palaces while Style Hounds are interested in shopping trips and nights out
- Day trips are mainly taking place in the same or neighbouring region to the one a person lives in – therefore it does not make sense if a destination in the South East focuses all their marketing efforts to attract day visitors living in Yorkshire
- The greatest perceived barrier to going on day trips is the expense of it, followed by the effort it takes to organise a day out. These barriers are far more difficult to address than providing within the destination what people are looking for, as they are both highly personal and may reflect real economic circumstances as well as the perceived relative ‘value for money' achieved by going out.
- The most important motivator for a day out is the desire to do something different, have a change of scene.
- The web is fast becoming the most important information source for people who want to find out about day trip destinations. However, the majority of day trippers go without any pre-planning, just go on the spur of the moment.

How often people are going on day trips and their overall opinion about day trips are influenced by age, income and Arkleisure segments:

- Style Hounds and particularly the Cosmopolitans are the most active of all groups. Cosmopolitans will always be among the most active of all groups and day trip activity is no exception. They show interest in every kind of day out and are generally up for all kinds of events and new experiences. They are twice as likely as most other groups to attend a special event. As they are the highest income group they are also the most valuable visitors to attract
- Functionals and Habituals will be the most difficult to persuade of the benefits of day trips. Fortunately these are smaller and less valuable groups.
- High Streets (and to a lesser extent Followers) are neutral in their opinions of day trips. These are the most persuadable groups. However they are also difficult to motivate, therefore they need easy things to do whose benefits can be immediately seen
- Day trip activity is also clearly related to income, providing the means to go out but perhaps also associated indirectly with the knowledge or understanding of how to find the knowledge about what to do
- Day trip activity reduces with age. Gender differences are not as pronounced, but males are generally a bit more active than females.

When looking at different types of attractions respondents have visited, traditional heritage sites are by far the most popular kind of attraction with almost universal appeal across all segments. The one group that will not be found there are Style Hounds. This segment is more interested in visiting White Knuckle Theme Parks, making up 25% of visitors to this attraction type.

The survey also looked at the role of shopping with regards to day trips. Approximately 30% of people think that good shopping opportunities on a trip is really their kind thing and over 60% of people take a shopping day out to an unusual place i.e. ‘tourist shopping' at least 3 times a year. Even when shopping is not the main purpose of the trip, most people will buy something while out, making shopping is an important and lucrative component of most day trips. This makes it important to destinations to offer a shopping environment which visitors will enjoy. For example visitors in the oldest age group of 65+ are more likely to enjoy traditional markets than the youngest age group.

Contents

Introduction

This report summarises the main results from the National Day Visits surveys carried out by Arkenford on behalf of Visit Britain and Tourism South East (TSE). The fieldwork was carried out in 3 waves over a 6 month period from August 2007 to February 2008.

The 2005 England Leisure Day Visits report, led and coordinated by the Countryside Agency and supported by a consortium of national agencies with an interest in recreation and tourism, showed a downward trend in the number of leisure day visits, with overall fewer people taking leisure day trips compared to the 2002/03 study. Another finding from this study was that those people who do take day trips are taking them less often.

This raises the question why fewer people are choosing to take on day trips, or if they do why they are going less often. What could encourage them to reverse this trend to the benefit to the local visitor economy?

With this in mind two surveys were carried out. The first was a national survey with a thematic focus, which concentrates on exploring specific day trip types. The second was a regional survey of respondents living in the South East area and was locational in focus and was designed to find out more about the type of visitor to specific destinations in the Tourism South East area. Both surveys were carried out using an online methodology and quotas were applied to ensure that the achieved samples would reflect the distribution of the population by age, gender, region and ArkLeisure® Segment.

Arkenford's role in the South East survey is more limited as much of the reporting of the research and policy formation is being undertaken by Tourism South East.

Arkenford are responsible for the entire reporting and analysis of the national survey and this report provides a comprehensive assessment of the attitudes and behaviour of people nationally. It includes:

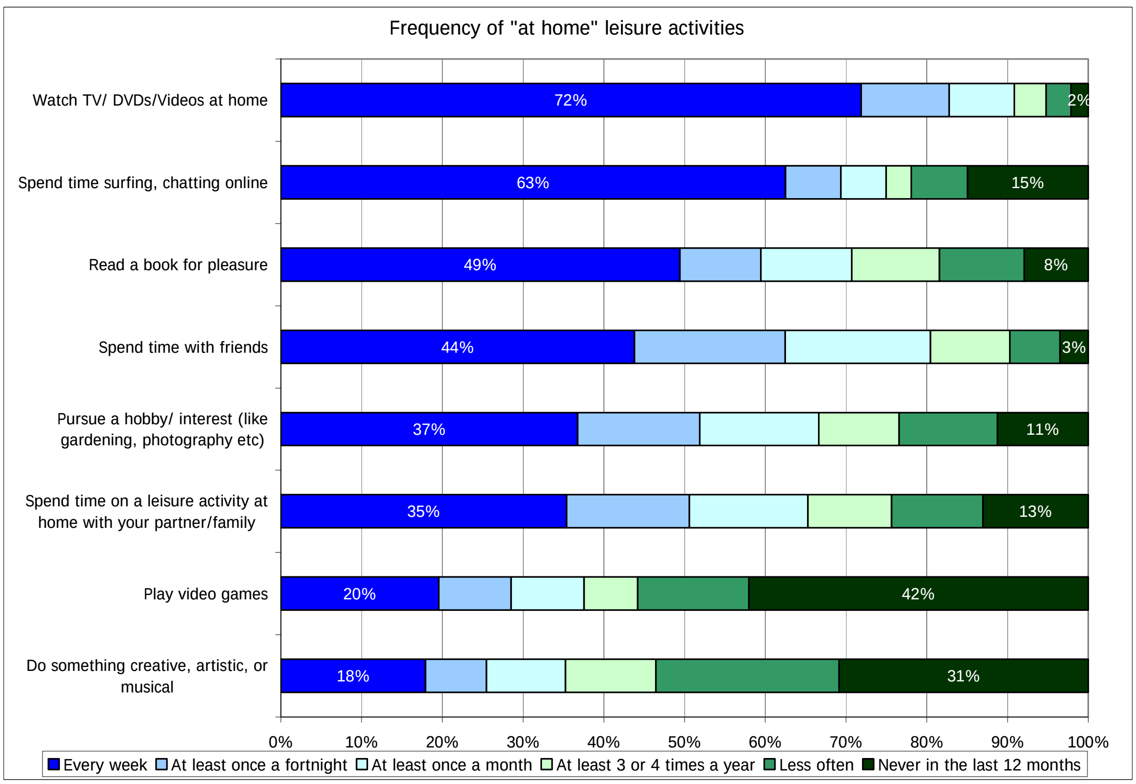
- A profile of the current pattern of day trips in England
- Behaviour of day visitors analysed by ArkLeisure segments
- A better understanding of the decision making process for day trips
- A summary of the perceived benefits and disadvantages of day trips
- A better understanding of the leisure activities competing with days out to occupy people's time and interests
- Preferred types of attraction
- Role of shopping on day trips

The Facts

The media are full of reports about Britain's culture of long working hours. These reports highlight the fact that while people have growing income they have less free time available for leisure. One might think that as most days out usually take place at the weekends they are not in direct competition with other leisure activities. However, if people lack the time to pursue their favourite leisure activities during the week, then they have to do these on the weekends instead, which would have an impact on whether people choose to go on days out.

Figure 1 shows that there are a wide variety of leisure activities that now command a significant amount of time and a considerable proportion of people do each activity on a regular basis even every week. The three activities are most popular, watching TV, spending time surfing online and reading books. They are all activities which are easily accessible at home, though the ability to spend leisure time online is a relatively recent phenomena and far more wide spread than the computer gaming that preceded it.

Figure 1 Frequency of 'At Home' Leisure Activities



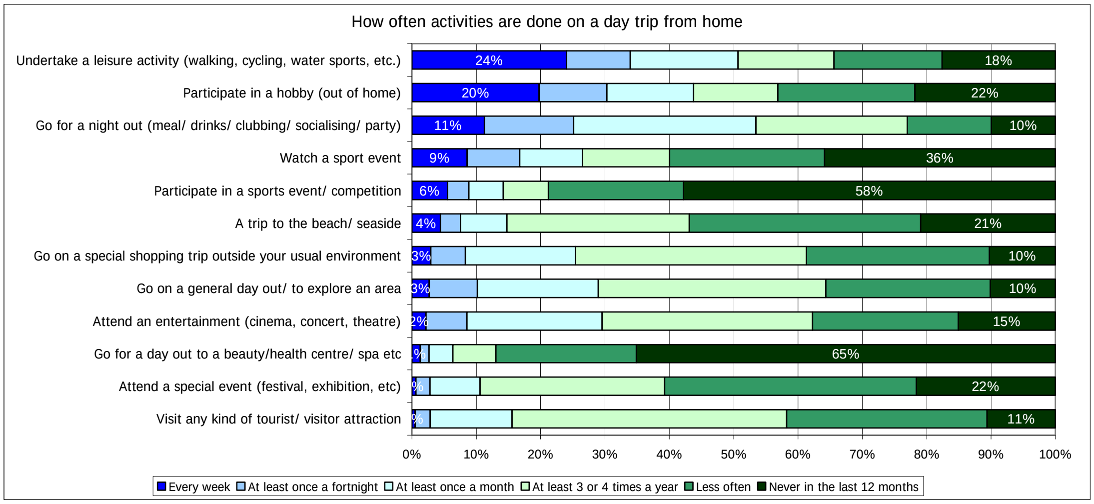
Base: All respondents (5300)

So how do days out compare in popularity with these home based pastimes. Days out are much rarer events.

Figure 2 shows the frequency with which people take days out. 'Undertaking a leisure activity' is the most frequently done activity, 24% of people do this every week. From past research we know most of this activity is likely to be walks. Participating in a hobby (out of home) is also popular. The only other trips out that would appear among the list above would be eating out and drinking out.

While going out is a much rarer event for most people, there is a diverse list of activities that more than 50% of the population do at least 3 or 4 times a year. These include: visiting tourist attractions; attending an entertainment (theatre/cinema etc); going for general day out; on a special shopping, and pursuing hobbies and other 'leisure activities'. Therefore most people are far from inactive and this represents a significant pool of people who could be encouraged to increase the number of trips they take.

Figure 2 Annual frequency of day trips by trip type



Base: All respondents (5302)

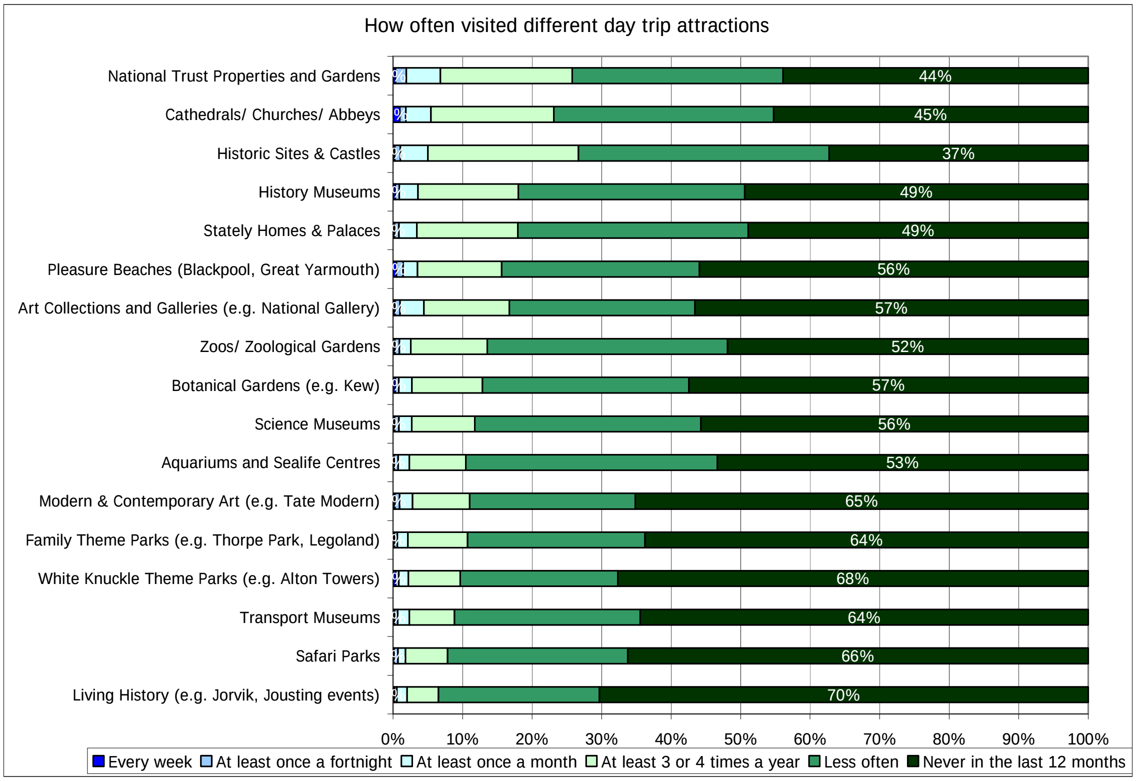
Approximately 58% of people take a trip to a visitor attraction at least three or four times a year.

The only source we can use as a comparison for these results is the 2005 England Day Visits survey mentioned before. In this survey the questions asked were slightly different, as respondents here were asked whether they had participated in a leisure day trip within the past week, which 63% of all respondents answered this positively. While the two surveys are not directly comparable it gives an indication of the popularity of day trips.

Figure 3 shows how often people are visiting specific **types of visitor attractions** on a day out. Each type of attraction is visited by at least 30% of people at least once a year, showing day trips are still a significant part of many people's overall leisure mix.

Overall heritage attractions of various kinds are the most popular such as National Trust properties and gardens, cathedrals and historic sites and castles.

Figure 3 Frequency of visits to different types of attractions



Base: All respondents (5302)

The Current Profile of Day Trippers

In the following tables we present an analysis of the types of people most likely to take day trips, and showing the profiles of those doing each activity at least once a month.

ArkLeisure Segments are true to type with the Style Hounds and particularly the Cosmopolitans being the most active of all groups. The youth of Style Hounds probably accounts for their greater interest in sports and parties but they are also into hobbies. Cosmopolitans will always be among the most active of all groups and day trip activity is no exception. They show interest in every kind of day out and are generally up for all kinds of events and new experiences. They are twice as likely as most other groups to attend a special event. As they are the highest income group they are also the most valuable visitors to attract.

Table 1 Proportion doing activity at least once a month by ArkLeisure segmentation

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmo politans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	53%	73%	68%	56%	54%	43%	43%	34%	30%
Undertake a leisure activity (walking, cycling, water sports, etc.)	51%	59%	62%	50%	55%	43%	47%	46%	32%
Participate in a hobby (out of home)	44%	53%	54%	46%	47%	34%	38%	39%	26%
Attend an entertainment (cinema, concert, theatre)	29%	**44%**	**45%**	30%	25%	17%	24%	20%	15%
Go on a general day out/ to explore an area	29%	33%	**44%**	29%	31%	17%	28%	23%	12%
Watch a sport event	26%	**42%**	33%	28%	25%	24%	16%	15%	18%
Go on a shopping trip outside your usual environment	17%	22%	**25%**	17%	13%	16%	12%	7%	12%
Visit any kind of tourist/ visitor attraction	16%	18%	**25%**	16%	15%	9%	16%	11%	9%
A trip to the beach/ seaside	15%	12%	21%	17%	17%	11%	12%	15%	11%
Participate in a sports event/ competition	14%	**23%**	18%	15%	15%	13%	11%	8%	5%
Attend a special event (festival, exhibition, etc)	10%	13%	**19%**	11%	8%	4%	8%	9%	3%
Go for a day out to a beauty/health centre/ spa etc	6%	**9%**	**13%**	7%	4%	4%	2%	2%	2%
Weighted Base	5,300	539	1,009	959	670	680	554	482	407

In contrast it will be extremely difficult to attract Habituals or Functionals to most kinds of day out, though some Functionals are interested in special events and other research shows that as a group they are quite interested in art. The relatively general nature of the categories does reduce some of the variations in the profiles.

Activity clearly declines with age. The young are especially active in; attending an entertainment, going on a 'special' shopping trip, participating in a sports event, or attending a special event, and going for a day out to a beauty centre/health spa. There is less difference by sex though overall men are slightly more active this is particularly the case in relation to sport, both watching it and doing it.

Table 2 Proportion doing activity at least once a month by age and gender

		Age						Gender	
	All respondents	16-24	25-34	35-44	45-54	55-64	above 65	Male	Female
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	53%	78%	62%	54%	51%	48%	38%	55%	51%
Undertake a leisure activity (walking, cycling, water sports, etc.)	51%	62%	59%	52%	47%	48%	42%	53%	49%
Participate in a hobby (out of home)	44%	59%	47%	44%	38%	41%	40%	49%	39%
Attend an entertainment (cinema, concert, theatre)	29%	**56%**	39%	28%	25%	18%	21%	32%	27%
Go on a general day out/ to explore an area	29%	38%	36%	31%	25%	26%	23%	31%	28%
Watch a sport event	26%	39%	36%	29%	27%	19%	15%	36%	17%
Go on a shopping trip outside your usual environment	17%	**25%**	20%	16%	13%	15%	14%	18%	15%
Visit any kind of tourist/ visitor attraction	16%	18%	20%	16%	14%	13%	14%	17%	14%
A trip to the beach/ seaside	15%	11%	15%	14%	16%	17%	18%	17%	14%
Participate in a sports event/ competition	14%	**25%**	21%	15%	13%	9%	8%	**22%**	7%
Attend a special event (festival, exhibition, etc)	10%	**20%**	15%	10%	8%	7%	8%	12%	9%
Go for a day out to a beauty/health centre/ spa etc	6%	**12%**	**12%**	6%	5%	3%	3%	6%	6%
Weighted Base	5,300	562	862	1,056	884	805	1,131	2,483	2,817

The impact of age is also revealed when looking at activity by lifestage. People living with others as a family or house share also tend to be more active than those living alone or only with their partner. This suggests that day trips remain a social affair and people are more inspired to be active when living with others.

Table 3 Proportion doing activity at least once a month by lifestage

		Lifestage					
	All respondents	Live alone	Live with partner only	House/Flat share	Family with children under 15	Family with children over 15	Empty nesters
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	53%	49%	55%	66%	51%	55%	47%
Undertake a leisure activity (walking, cycling, water sports, etc.)	51%	47%	51%	54%	57%	52%	46%
Participate in a hobby (out of home)	44%	42%	44%	52%	43%	46%	40%
Attend an entertainment (cinema, concert, theatre)	29%	27%	28%	**46%**	29%	32%	23%
Go on a general day out/ to explore an area	29%	24%	31%	33%	35%	28%	24%
Watch a sport event	26%	20%	23%	35%	34%	31%	23%
Go on a shopping trip outside your usual environment	17%	13%	17%	16%	20%	19%	14%
Visit any kind of tourist/ visitor attraction	16%	14%	16%	16%	21%	12%	13%
A trip to the beach/ seaside	15%	13%	18%	14%	17%	14%	15%
Participate in a sports event/ competition	14%	12%	11%	21%	18%	17%	12%
Attend a special event (festival, exhibition, etc)	10%	12%	10%	15%	11%	9%	8%
Go for a day out to a beauty/health centre/ spa etc	6%	5%	5%	8%	8%	7%	4%
Weighted Base	5,300	937	1,444	496	929	687	777

Activity is also clearly related to income, presumably providing the means to go out but perhaps also associated indirectly with the knowledge or understanding of how to find the knowledge about what to do.

Table 4 Proportion doing activity at least once a month by income

	All respondents	Income: Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	53%	38%	42%	53%	58%	65%	73%	75%	**81%**
Undertake a leisure activity (walking, cycling, water sports, etc.)	51%	44%	45%	50%	55%	55%	63%	66%	69%
Participate in a hobby (out of home)	44%	33%	39%	44%	48%	49%	55%	62%	61%
Attend an entertainment (cinema, concert, theatre)	29%	20%	23%	27%	31%	40%	43%	**49%**	**53%**
Go on a general day out/ to explore an area	29%	21%	25%	29%	32%	34%	39%	35%	**45%**
Watch a sport event	26%	15%	20%	26%	31%	34%	39%	36%	**43%**
Go on a shopping trip outside your usual environment	17%	13%	17%	15%	18%	18%	19%	19%	23%
Visit any kind of tourist/ visitor attraction	16%	10%	13%	16%	17%	19%	20%	**25%**	**26%**
A trip to the beach/ seaside	15%	16%	16%	17%	15%	12%	12%	14%	13%
Participate in a sports event/ competition	14%	9%	8%	15%	16%	21%	**22%**	**27%**	**30%**
Attend a special event (festival, exhibition, etc)	10%	7%	9%	9%	12%	13%	15%	**18%**	**18%**
Go for a day out to a beauty/health centre/ spa etc	6%	5%	4%	5%	7%	9%	9%	**13%**	**12%**
Weighted Base	5,300	690	1,399	1,155	869	540	436	131	80

There are some distinct differences in the most popular activities in each region. For example Londoners are party people, 61% go for a night out at least once a month, and they are more likely than any other region to go to an entertainment, to go shopping, to go to a special event or a day out and a beauty or health spa. Those living in the West, both Wales and the South West, are much more likely to visit a beach. Activity rates are by far the lowest in the East Midlands.

Table 5 Proportion doing activity at least once a month by origin

	All respondents	Origin: South/ South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	53%	53%	61%	48%	59%	54%	57%	58%	43%	44%	52%	52%
Undertake a leisure activity (walking, cycling, water sports, etc	51%	48%	53%	56%	48%	48%	47%	46%	44%	53%	57%	63%
Participate in a hobby (out of home)	44%	41%	46%	48%	42%	41%	45%	44%	40%	43%	47%	46%
Attend an entertainment (cinema, concert, theatre)	29%	26%	40%	25%	27%	29%	29%	32%	21%	30%	31%	31%
Go on a general day out/ to explore an area	29%	25%	33%	33%	30%	30%	26%	27%	19%	31%	34%	36%
Watch a sport event	26%	23%	31%	25%	32%	25%	27%	27%	23%	23%	31%	26%
Go on a shopping trip outside your usual environment	17%	16%	23%	12%	14%	19%	17%	16%	11%	17%	18%	13%
Visit any kind of tourist/ visitor attraction	16%	13%	17%	18%	20%	14%	14%	14%	12%	18%	16%	19%
A trip to the beach/ seaside	15%	18%	8%	**28%**	23%	11%	12%	4%	9%	23%	16%	**27%**
Participate in a sports event/ competition	14%	14%	19%	15%	15%	10%	13%	14%	10%	16%	15%	15%
Attend a special event (festival, exhibition, etc)	10%	8%	**18%**	9%	12%	10%	8%	10%	7%	11%	11%	11%
Go for a day out to a beauty/health centre/ spa etc	6%	5%	**10%**	4%	4%	6%	7%	7%	2%	5%	9%	7%
Weighted Base	5,300	762	660	466	243	608	428	486	408	498	486	255

Defining a Tourism Trip

We have already shown that as might be expected people commit far more time to in home activities than they do to going out. If we consider just tourism trips excluding those to places in the local environment then these activities are even rarer.

There is currently a desire within the industry to move from the traditional definition of a tourism trip (usually 3 hours from home or similar equivalent) to one that is more compatible with the WTO definitions. Arkenford has been in the forefront of designing practical means of applying the WTO definition. Work on the first Tourism Satellite Account for NWDA has allowed us to develop a working definition which has been applied to this research to define trips that add value to the local economy.

The WTO definition defines tourism activities in terms of non residential leisure activity. This is based on a personal respondent lead definition of an activity that is outside their normal environment – either because it is an 'unusual event' or in an 'unusual location'. There is no set definition to define the boundary between 'usual' and 'unusual'. Each agency is invited to create a definition of value to their local situation. The diagram below explains the categories that have been used in this study.

		Frequency	
		Usual	Unusual
Geography	Usual	Living, Working, 'Everyday' Shopping	Rare activities within your usual environemnt eg going to the cinema once a quarter
	Unusual	Usual Activities outside your 'usual' environment eg visiting granny once a week	Unusual activities both in terms of place and frequency eg a visit to a tourist attraction in Northumberland

The vertical boundary is defined by geography. As a working definition we have identified usual environment as the place where people, work, shop and live. This already goes beyond their residential environment, but is essentially restricted to the residential and working population of an area. Tourism income would then come from other people visiting the area. The value of this definition is it identifies extra income not generated from the residential population.

There are no guidelines on the horizontal boundary when does an activity become infrequent enough to be unusual. In our view we should identify usual frequency as one that is so repetitive that it begins to make the area 'familiar' to a person (i.e. part of their 'usual environment'). If for example a person only goes to the cinema a couple of times a year then this is a pretty 'unusual activity' for them. However if they do this in their local area then while it is a day out from their perspective it is clearly still income generated from a local resident. It would therefore be incorrect to perceive this as additional to the local economy. What becomes less clear is if the day out is to a 'tourist attraction' for example a steam rally. Then while the visitor is a local resident the event has clearly added value to the local economy.

For the purposes of the national study we have simplified the definition to cover simply activities outside a respondents' usual environment. We collected information on each respondent's residence, and usual places of work and everyday shopping and defined trips outside this area as tourism trips. Local research should consider including the local infrequent events in the definition.

If a respondent said that they had taken part in an of the types of days out, they were asked how often in the past 3 months they had done these inside their usual environment and how many were outside the usual environment.

The table below shows the proportion of events inside and outside the respondent's usual environment in the past 3 months. This will give an indication how much of each of the day out activities generate additional inbound tourism income for the area.

- Visiting a tourist/visitor attraction,
- going on a general day out,
- attending a special event, and
- going on a trip to the beach/seaside

are the 4 activities that happen at least one third of the time outside the respondent's usual environment. Going on a shopping trip outside one's usual environment was not included in the chart below as by definition 100% of these trips need to be outside the usual environment.

Figure 4 Proportion of day trip activities inside and outside usual environment

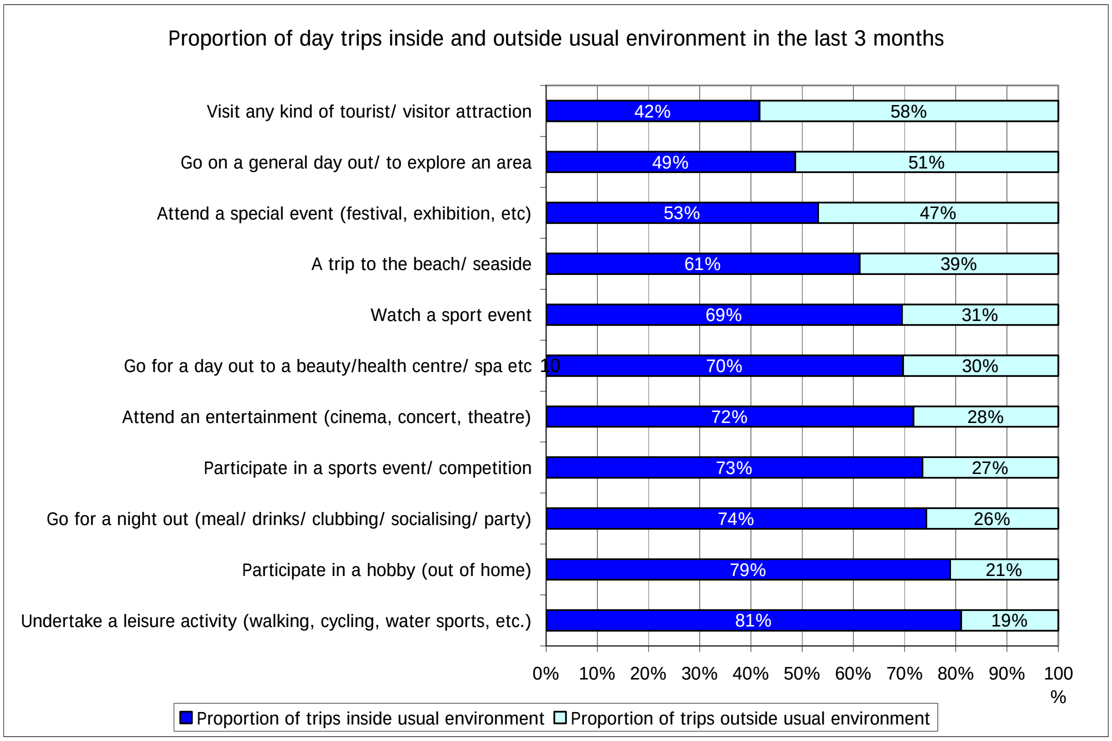


Table 6 shows an estimate of the total number of tourism day trips (i.e. trips outside of the usual environment) taken by the adult GB population in the past 3 months. Going on a special shopping trip accounts for 15% of all tourism trips, followed by undertaking a leisure activity, going on a general day out to explore and going for a night out.

Table 6 Estimate of total number of tourism trips in the past 3 months by trip type

	Total number of tourism trips	% of all tourism trips
A trip to the beach/ seaside	49,802,752	9%
Go on a special shopping trip outside your usual environment	89,979,041	15%
Visit any kind of tourist/ visitor attraction	57,471,009	10%
Undertake a leisure activity (walking, cycling, water sports, etc.)	78,027,860	13%
Participate in a sports event/ competition	16,802,052	3%
Go on a general day out/ to explore an area	77,796,162	13%
Watch a sport event	34,132,988	6%
Attend a special event (festival, exhibition, etc)	26,592,292	5%
Attend an entertainment (cinema, concert, theatre)	30,725,392	5%
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	68,262,890	12%
Participate in a hobby (out of home)	46,101,042	8%
Go for a day out to a beauty/health centre/ spa etc	6,875,361	1%
Total number of trips	582,568,839	100%

Trip Profiles

Where do they Go

Table 7 below shows the origin of day trippers visiting each region. The majority of people on a day trip to a specific region live in that same region or a neighbouring region. Only a small number of people travel further. For example, of all respondents mentioning a destination in the South East for their last day trip, 45% live in the South East and 29% in London. There are two regions that do have a larger than average influx of people; the East of England benefits from visitors from London and the South East and the East Midlands benefits from travellers coming from the West Midlands and Yorkshire. In general the flow is from population centres to less populated areas. Areas like the North East which have both conurbations like Liverpool and Manchester and strong visitor destinations like Cumbria are the most self contained.

Table 7 Destination region of last day trip in Britain by origin of respondent

		Destination Region											
		South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East of England	Scotland	Wales	Total
	South/South East	45%	22%	14%	4%	2%	3%	6%	6%	29%	2%	3%	16%
	London	29%	45%	10%	3%	4%	3%	3%	5%	20%	2%	3%	16%
	South West	5%	5%	44%	2%	2%	1%	4%	2%	1%	1%	6%	8%
	North East	1%	1%	1%	61%	2%	8%	1%	1%	0%	2%	2%	3%
	North West	2%	4%	3%	5%	64%	14%	6%	6%	1%	3%	14%	12%
Origin	Yorkshire	2%	3%	2%	8%	6%	57%	3%	17%	1%	2%	3%	8%
	West Midlands	5%	7%	10%	5%	8%	4%	64%	21%	3%	2%	12%	12%
	East Midlands	4%	5%	4%	1%	3%	5%	5%	37%	11%	0%	2%	6%
	East	3%	6%	6%	2%	2%	2%	2%	3%	32%	1%	1%	6%
	Scotland	1%	1%	2%	7%	2%	2%	1%	1%	1%	82%	1%	9%
	Wales	2%	2%	5%	1%	5%	1%	5%	1%	1%	1%	55%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Weighted Base	3,022	3,015	2,420	616	2,578	1,525	1,610	1,264	2,037	1,915	979	20,982

The type of day trip activity that a destination attracts is influenced a lot by what a destination has to offer. For example, as London is not on the coast, it won't attract a lot of day trippers who want to go for a day out to the beach. However, the South West with its beautiful stretches of beach is a lot more likely to attract people who are interested in doing this activity. The table below shows what visitors consider are the relative strengths of each region's visitor economy.

Table 8 shows the types of day trips people take in each region. London is the favoured destination for attending special events and attending special entertainment, with 24% of trips to London having these main purposes, compared to an average of 7% across all regions. It is likely that a lot of these trips are to London theatres and concerts etc. Surprisingly, London does not show particularly strongly on shopping but is comparable with other regions.

The South West and Wales attract visitors to their beaches and Wales also attracts many people for activity trips (cycling walking etc). The North East and West Midlands are most orientated towards ‘party’ visits.

Table 8 Trip type by Destination region of last day trip in the UK

	South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East of England	Scotland	Wales	All Trips
A trip to the beach/ seaside	14%	1%	**16%**	12%	10%	9%	1%	8%	14%	8%	**16%**	9%
Go on a special shopping trip outside usual environment	15%	15%	12%	16%	18%	16%	16%	13%	14%	15%	11%	15%
Visit any kind of tourist/ visitor attraction	17%	21%	19%	12%	17%	20%	18%	18%	14%	19%	14%	18%
Undertake a leisure activity (walking, cycling, water sports, etc.)	9%	4%	9%	6%	7%	8%	7%	10%	9%	9%	**13%**	8%
Participate in a sports event/ competition	2%	2%	2%	3%	2%	1%	3%	2%	3%	2%	3%	2%
Go on a general day out/ to explore an area	15%	8%	16%	12%	11%	16%	12%	15%	13%	13%	15%	13%
Watch a sport event	3%	7%	3%	6%	7%	4%	6%	5%	4%	5%	4%	5%
Attend a special event (festival, exhibition, etc)	5%	**12%**	5%	5%	6%	6%	9%	6%	4%	6%	6%	7%
Attend an entertainment (cinema, concert, theatre)	5%	**12%**	5%	8%	6%	6%	9%	5%	7%	6%	4%	7%
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	10%	12%	8%	13%	11%	9%	13%	10%	10%	11%	9%	10%
Participate in a hobby (out of home)	5%	4%	4%	5%	4%	4%	5%	6%	6%	5%	5%	5%
Go for a day out to a beauty/health centre/ spa etc	2%	2%	2%	1%	2%	1%	2%	2%	2%	2%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Weighted Base	3,022	3,015	2,420	616	2,578	1,525	1,610	1,264	2,037	1,915	979	20,982

Table 9 shows the most important destination regions for the various different types of day trips. For example, trips to the beach/seaside mainly took place in the South East (21%), followed by the South West (20%) and East of England (14%).

Table 9 Profile of destination regions of last day trip in the UK for different trip types

	South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East of England	Scotland	Wales	Total	Weighted Base
A trip to the beach/ seaside	21%	1%	**20%**	4%	13%	7%	1%	5%	14%	8%	**8%**	100%	1985
Go on a special shopping trip outside usual environment	15%	14%	9%	3%	15%	8%	8%	5%	9%	9%	4%	100%	3092
Visit any kind of tourist/ visitor attraction	14%	17%	12%	2%	12%	8%	8%	6%	8%	10%	4%	100%	3683
Undertake a leisure activity (walking, cycling, water sports, etc.)	16%	7%	14%	2%	10%	7%	7%	8%	11%	10%	**7%**	100%	1670
Participate in a sports event/ competition	14%	14%	9%	4%	12%	4%	11%	6%	12%	8%	5%	100%	504
Go on a general day out/ to explore an area	16%	9%	14%	3%	11%	9%	7%	7%	10%	9%	5%	100%	2723
Watch a sport event	9%	20%	6%	4%	17%	6%	9%	6%	9%	9%	4%	100%	977
Attend a special event (festival, exhibition, etc)	11%	**27%**	9%	2%	11%	6%	10%	5%	6%	9%	4%	100%	1376
Attend an entertainment (cinema, concert, theatre)	10%	**25%**	8%	3%	12%	6%	10%	5%	10%	8%	3%	100%	1421
Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	13%	17%	9%	4%	13%	7%	9%	6%	10%	9%	4%	100%	2199
Participate in a hobby (out of home)	15%	13%	10%	3%	10%	6%	8%	8%	12%	10%	5%	100%	989
Go for a day out to a beauty/health centre/ spa etc	14%	19%	13%	2%	11%	5%	7%	6%	9%	10%	3%	100%	364
All Trips	14%	14%	12%	3%	12%	7%	8%	6%	10%	9%	5%	100%	20982

Who do they go with

Table 10 shows that who people travel with influences what they do, reflecting the national household demographics. Most trips are taken with ones partner. (The figures below add to more than 100% as they are multi punch options.)

The most popular day out - a general day out ‘to explore an area’ - shows little differentiation from the national profile but other kinds of trip are more likely to attract specific groups. Friends tend to do more planned/purposeful things; sports, nights out and hobbies/ spa trips. Families form a bigger component of those going to the beach, a tourist attraction or a sports event.

Table 10 Who did you go with – by trip type

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertainment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa etc	All Trips
Partner	66%	59%	63%	61%	37%	66%	37%	51%	57%	54%	46%	46%	58%
Children under 10	25%	12%	23%	18%	12%	15%	11%	15%	10%	4%	10%	10%	15%
Children over 10	14%	9%	14%	11%	11%	10%	15%	11%	9%	3%	8%	4%	10%
Other family	25%	23%	22%	19%	11%	17%	25%	20%	15%	18%	14%	18%	20%
Close friends	17%	20%	18%	21%	34%	21%	39%	29%	30%	47%	30%	31%	25%
Organised groups	3%	1%	4%	4%	25%	1%	3%	5%	2%	6%	11%	2%	4%
Weighted Base	900	1,227	1,272	643	200	1,311	378	577	695	723	364	135	8,425

Reasons that Prompted the Trip

Table 11 shows that 23% of day trips are prompted by a desire to do something different, have a change of scene. This strongly correlates with the recognition that a day out can refresh people. This is a strong motivation for visits to Tourist attractions and for trips of general ‘exploration’, but it is an important motivation for almost all kinds of trip.

The weather is also an important prompt suggesting a very spur of the moment decision. Good weather is most likely to be a reason prompting trips to the beach, a leisure activity (walking/cycling etc), hobbies and general ‘exploration’.

‘Just to get out the house’ is a relatively negative prompt for a day out but it is significant among those going to the beach, exploring and going to a health spa.

Table 11 Reasons for Taking a Day Trip

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertain ment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa etc	All Trips
To do something different/ a change of scene	30%	18%	22%	26%	13%	31%	17%	18%	18%	19%	20%	31%	23%
To visit an attraction I/we wanted/ planned to visit	10%	6%	**33%**	10%	15%	13%	**31%**	**43%**	27%	5%	15%	5%	18%
We felt like doing some shopping	2%	**50%**	4%	4%	2%	11%	2%	4%	8%	4%	4%	5%	12%
Just to get out of the house	12%	8%	8%	**18%**	6%	13%	5%	5%	10%	14%	12%	8%	10%
Good weather	**18%**	5%	8%	**17%**	**16%**	13%	5%	5%	2%	2%	13%	11%	9%
A celebration	4%	4%	4%	4%	4%	4%	3%	7%	10%	**35%**	3%	**23%**	8%
Just to occupy/ entertain the children	**7%**	1%	**6%**	5%	4%	3%	2%	3%	4%	1%	3%	1%	4%
To attend a specific event (concert, football match etc)	1%	1%	1%	1%	**22%**	1%	**22%**	**7%**	**7%**	2%	**6%**	1%	3%
Visiting friends or family e.g. reunion	**6%**	3%	2%	4%	3%	3%	2%	2%	2%	**5%**	2%	0%	3%
To entertain visitors	3%	1%	**4%**	2%	1%	2%	2%	2%	2%	2%	2%	0%	2%
We were persuaded to go by what other people said about the	1%	2%	2%	1%	2%	2%	1%	1%	2%	**3%**	2%	**5%**	2%
To pursue a hobby or exercise e.g. fishing, cycling, swimming	1%	0%	0%	**4%**	**6%**	1%	**2%**	0%	0%	0%	**8%**	1%	1%
Business/school related	1%	1%	**1%**	0%	0%	0%	0%	1%	0%	1%	**1%**	0%	1%
Day out while on holiday in/ travelling through the area	**1%**	1%	1%	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%
To explore the area	**1%**	0%	0%	0%	0%	**1%**	1%	0%	0%	0%	**2%**	0%	0%
Nightlife e.g. restaurant, clubbing	0%	0%	0%	0%	0%	0%	0%	0%	0%	**4%**	0%	0%	0%
Other	1%	0%	1%	0%	**2%**	0%	0%	0%	0%	0%	**2%**	**1%**	0%
We had tickets/It was a present	0%	0%	0%	0%	0%	0%	**4%**	0%	**1%**	0%	0%	**2%**	0%
To see a film/go to cinema/theatre	0%	0%	0%	0%	0%	0%	0%	0%	**5%**	0%	0%	0%	0%
Been before and enjoyed it/Home town	**1%**	0%	0%	0%	**1%**	1%	0%	0%	0%	0%	**1%**	0%	0%
Club/Group meeting/activity	0%	0%	0%	0%	**1%**	0%	0%	1%	0%	0%	**3%**	0%	0%
Pet related	**1%**	0%	0%	**1%**	0%	0%	0%	0%	0%	0%	**1%**	0%	0%
Socialising	0%	0%	0%	0%	**1%**	0%	0%	0%	0%	**1%**	0%	0%	0%
To relax/have fun	**0%**	0%	0%	0%	**1%**	0%	0%	0%	0%	**0%**	**0%**	**3%**	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Weighted Base	900	1,227	1,272	643	200	1,311	378	577	695	723	364	135	8,425

Factors that make for a good day out

Different kinds of attraction have different rewards and appeal to different people. We cover this in some depth later. However, we have also sought to get an overall impression of what people are looking for from a day out. We are seeking to understand their basic priorities before they have started to think specifically about where they might go.

- The first priority appears to be a pleasant experience this takes two forms – firstly a pleasant place to be and secondly good local food and drink. These appear to be drivers for 50% of the population. Unpleasantness and difficulty in finding food create stress that is in conflict with good memories and

- A significant number of people (30-40%) are looking for 'lots of things to do, a new experience, something out of the ordinary'.

- The third group of priorities (20-30%) are; good shopping, live performances and a bit of culture.

In general these overall market priorities are reflected in the priorities of people in the individual ArkLeisure segments. However there are some significant relative differences. There are some specific interests for particular segments and some overall trends. For example the older segments, Followers and Habituals, are more interested in peace and quiet, pleasant environments, good food and 'something nostalgic' than the younger ones. In contrast a cool stylish place and a 'thrilling experience' are important to the younger segments especially style Hounds and Cosmopolitans. Discoverers are more driven by a desire for a new experience of something out to of the ordinary.

Table 12 Important factors that make a good day out by ArkLeisure segments

			Arkleisure Segmentation							
	All respondents		Style Hounds	Cosmo politans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
An attractive setting/ environment	48%	197	159	170	211	203	214	237	233	263
Good local food and drink	48%	195	172	164	229	200	241	226	193	238
Lots of things we can do	37%	152	175	130	162	178	190	136	124	156
A new experience	34%	141	150	139	134	176	137	133	148	65
Peace and quiet	30%	124	55	99	114	118	156	171	177	288
Something out of the ordinary	29%	119	115	128	109	152	93	119	127	37
Good shopping	27%	109	143	103	121	94	147	85	73	115
Good live performances	24%	99	95	99	100	102	111	93	96	103
Something with a bit of culture	23%	94	49	117	90	72	35	133	126	87
A thrilling experience	21%	84	131	91	73	96	73	43	55	52
Something nostalgic	18%	74	44	83	73	62	52	98	93	91
Lots of entertainment laid on	17%	71	106	70	72	65	98	46	38	66
An opportunity to meet new people	17%	70	80	80	69	62	51	60	67	56
Something educational	16%	65	36	78	56	59	30	79	110	57
A cool/stylish place	15%	60	108	77	51	43	46	28	14	33
Good nightlife - clubs and bars	14%	57	108	52	52	55	72	20	35	42
Something artistic	13%	54	29	79	45	31	17	76	71	30
Good sporting facilities	8%	34	44	39	38	31	35	18	18	22
Weighted Base	5300		539	1009	959	670	680	554	482	407

The following table makes the differences more explicit by showing the extent to which each segment scored above or below the population index.

Table 13 Index of important factors that make a good day out by ArkLeisure segments

	Style Hounds	Cosmopol itans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
An attractive setting/ environment	-37	-27	14	6	18	40	36	66
Good local food and drink	-23	-31	34	5	46	31	-2	43
Lots of things we can do	23	-21	10	26	39	-16	-28	4
A new experience	9	-2	-7	35	-4	-9	7	-76
Peace and quiet	-69	-25	-9	-6	33	48	53	164
Something out of the ordinary	-4	9	-10	32	-26	0	8	-82
Good shopping	34	-6	12	-15	38	-24	-36	6
Good live performances	-5	0	1	3	12	-6	-3	4
Something with a bit of culture	-45	24	-3	-22	-59	39	32	-7
A thrilling experience	47	7	-12	12	-12	-42	-29	-32
Something nostalgic	-31	9	-1	-12	-23	24	19	17
Lots of entertainment laid on	35	-1	1	-7	27	-25	-33	-5
An opportunity to meet new people	10	10	-1	-8	-19	-10	-3	-14
Something educational	-29	13	-10	-6	-35	13	45	-8
A cool/stylish place	48	17	-8	-16	-13	-32	-46	-26
Good nightlife - clubs and bars	51	-5	-4	-2	16	-37	-21	-14
Something artistic	-25	25	-9	-23	-37	22	17	-24
Good sporting facilities	11	5	4	-2	2	-16	-16	-12

The data also shows the expected female preference for shopping (18% vs. 34%) and male preference for sports (12% vs. 5%). Younger people are more likely to want more from their day out naming a whole range of benefits they are seeking. They are especially interested in thrills, nightlife, style and lots of entertainment, prioritised by over a third of those under 24.

Life stage is less good at identifying drivers though the need to entertain the children with ‘lots to do’ and a thrilling experience is clear. House/flat sharers often being younger also tend to want the kinds of things we have already identified as having an appeal for the young.

Level of income does little to discriminate preferences, but origin shows the much higher expectations of Londoners who want a much more from their day out than people living in other regions.

Table 14 Important factors that make a good day out by origin

		Origin										
	All respondents	South/South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
An attractive setting/ environment	48.0%	46.9%	44.9%	47.6%	49.5%	51.9%	45.7%	47.6%	49.1%	53.1%	44.5%	49.8%
Good local food and drink	47.6%	48.8%	42.7%	43.7%	57.7%	49.5%	48.4%	48.6%	47.1%	46.4%	49.1%	46.2%
Lots of things we can do	37.1%	35.9%	36.7%	30.4%	39.9%	37.5%	39.2%	40.6%	36.3%	39.1%	36.7%	37.0%
A new experience	34.5%	33.5%	38.1%	29.2%	31.1%	35.8%	36.6%	35.9%	30.8%	37.9%	33.4%	32.9%
Peace and quiet	30.2%	27.8%	28.5%	31.1%	24.3%	32.2%	32.0%	31.2%	31.5%	37.3%	26.9%	26.5%
Something out of the ordinary	29.1%	28.2%	32.3%	29.1%	25.6%	28.3%	29.3%	30.5%	31.2%	28.7%	27.0%	27.3%
Good shopping	26.6%	23.8%	25.7%	21.8%	26.2%	29.7%	25.8%	28.9%	29.4%	26.4%	27.6%	30.2%
Good live performances	24.2%	24.9%	25.3%	20.4%	23.6%	25.2%	25.3%	24.1%	26.1%	22.4%	24.2%	23.0%
Something with a bit of culture	22.9%	21.8%	28.5%	23.6%	20.5%	24.5%	22.5%	23.6%	19.1%	22.2%	21.2%	18.9%
A thrilling experience	20.6%	22.6%	25.0%	16.8%	16.0%	17.1%	21.8%	23.3%	17.4%	19.1%	21.9%	20.5%
Something nostalgic	18.1%	16.7%	21.5%	14.0%	16.6%	19.5%	19.6%	17.8%	18.1%	18.6%	16.3%	20.0%
Lots of entertainment laid on	17.4%	16.2%	21.5%	12.3%	17.0%	17.0%	16.4%	23.2%	14.8%	17.1%	18.2%	15.1%
An opportunity to meet new people	17.1%	15.7%	21.0%	11.9%	16.9%	16.3%	14.9%	18.0%	18.5%	15.6%	20.0%	19.8%
Something educational	16.0%	15.5%	21.1%	14.8%	12.5%	16.3%	16.6%	13.6%	15.4%	14.1%	14.8%	19.1%
A cool/stylish place	14.5%	14.2%	21.2%	11.6%	10.9%	14.2%	11.2%	16.6%	12.8%	11.5%	15.6%	16.0%
Good nightlife - clubs and bars	13.8%	12.5%	17.1%	11.2%	16.6%	14.9%	13.0%	15.7%	10.2%	11.5%	15.5%	14.0%
Something artistic	13.2%	13.6%	17.9%	12.9%	10.6%	16.8%	8.0%	13.7%	10.2%	13.5%	10.5%	11.1%
Good sporting facilities	8.2%	7.3%	11.4%	7.1%	6.8%	9.5%	4.7%	9.1%	9.4%	6.5%	8.7%	7.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Base	5300	762	660	466	243	608	428	486	408	498	486	255

Table 15 shows the correlation between the types of attractions people have visited and what they think is important to make a good day out. Something artistic is especially important for those who have been to modern art galleries, whereas those having visited a White Knuckle Theme Park are looking for a thrilling experience.

Table 15 Important factors that make a good day out by attraction types visited

	Go on these days out at least 3 or 4 times a year																	
	Botanical Gardens	Cathedrals/ Churches/ Abbeys	National Trust Properties and Gardens	Stately Homes & Palaces	Historic Sites & Castles	Living History	History Museums	Science Museums	Transport Museums	Art Collections and Galleries	Modern & Contemporary Art	Zoos/ Zoological Gardens	Safari Parks	Aquariums and Sealife Centres	White Knuckle Theme Parks	Family Theme Parks	Pleasure Beaches	Average
An attractive setting/ environment	56%	56%	56%	55%	58%	49%	55%	49%	48%	56%	52%	50%	45%	47%	46%	46%	49%	51%
Good local food and drink	48%	50%	51%	50%	52%	43%	51%	45%	45%	50%	49%	46%	47%	48%	48%	47%	48%	48%
Lots of things we can do	37%	35%	37%	37%	41%	44%	39%	42%	37%	36%	36%	48%	47%	48%	52%	51%	48%	42%
A new experience	39%	40%	39%	40%	42%	40%	42%	41%	40%	42%	40%	42%	43%	43%	47%	42%	43%	41%
Peace and quiet	33%	35%	33%	32%	32%	26%	32%	28%	29%	29%	24%	24%	25%	23%	22%	20%	26%	28%
Something out of the ordinary	36%	35%	35%	37%	36%	37%	38%	36%	38%	38%	39%	34%	35%	37%	38%	34%	35%	36%
Good shopping	28%	25%	25%	27%	25%	28%	24%	23%	26%	25%	26%	30%	31%	32%	36%	33%	32%	28%
Good live performances	28%	28%	27%	28%	28%	29%	29%	29%	29%	33%	34%	28%	31%	31%	32%	28%	30%	29%
Something with a bit of culture	35%	36%	34%	36%	35%	34%	39%	35%	29%	43%	44%	26%	26%	26%	23%	23%	24%	32%
A thrilling experience	22%	20%	20%	21%	23%	28%	23%	27%	24%	22%	23%	29%	34%	33%	**44%**	37%	31%	27%
Something nostalgic	25%	25%	23%	26%	25%	28%	25%	24%	30%	23%	22%	20%	21%	22%	22%	20%	24%	24%
Lots of entertainment laid on	20%	16%	16%	17%	18%	26%	20%	21%	23%	17%	19%	27%	31%	32%	**36%**	33%	29%	24%
An opportunity to meet new people	24%	22%	19%	20%	21%	26%	22%	24%	23%	25%	24%	21%	25%	22%	27%	24%	24%	23%
Something educational	25%	23%	23%	23%	22%	28%	27%	29%	26%	27%	25%	21%	19%	22%	18%	17%	18%	23%
A cool/stylish place	16%	15%	13%	15%	15%	21%	15%	18%	16%	17%	21%	18%	23%	19%	**28%**	23%	21%	19%
Good nightlife - clubs and bars	13%	11%	10%	11%	13%	19%	14%	16%	16%	14%	18%	18%	23%	20%	**31%**	25%	22%	17%
Something artistic	21%	21%	19%	20%	19%	24%	23%	22%	19%	30%	**33%**	17%	18%	18%	17%	17%	17%	21%
Good sporting facilities	12%	9%	9%	9%	10%	16%	11%	14%	15%	10%	11%	13%	19%	16%	19%	18%	13%	13%
Weighted Base	682	1226	1365	952	1414	346	955	623	469	887	585	718	416	554	511	568	828	5300

How Do they Prepare

Sources of information

Knowing which sources of information people use when deciding on a day out will help to focus marketing effort on the best media sources. However, for over half of the trips asked about people do not use any information. This is most common when people are familiar with the location or there is no obvious source of information they could use, eg. the beach, shopping and general days out.

Recommendations from friends and family are the most important source of information, quoted by 23% of respondents, this source is especially usefully for nights out and prompting attendance at sporting events. In combination with the table above this suggests some people may not only being recommended to attend but being taken by their friends.

Websites for specific attractions (11%) and the website of a tourist office (8%) are the most used 'official' sources. This shows that the web is now the most important information source for people. Of course people need to already be proficient surfers or know something about the attraction before they can find a specific site. It suggests that web profile is a necessity for modern destinations. This is particularly the case for special events which apparently now have 25% of their visitors seeking information through a site specific web site.

Conventional advertising has a modest overall role providing information for only 5.5% of trips. However it may have a wider awareness raising role prompting people to seek further information. Again it is special events and entertainments that gain most benefit from advertising.

Table 16 Information Sources By Type of Trip

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertainment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa etc	Total
I did not use any information just went	60.6%	67.9%	38.7%	52.8%	42.8%	55.1%	52.7%	31.8%	43.2%	59.9%	49.2%	24.5%	51.6%
An advertisement	3.2%	4.0%	6.9%	2.2%	5.8%	2.9%	5.0%	15.8%	10.2%	2.1%	4.8%	13.5%	5.5%
a brochure	4.7%	4.3%	10.0%	4.8%	8.0%	5.7%	4.0%	9.8%	6.2%	2.1%	7.0%	18.5%	6.2%
a web site of tourist board, area or city etc	8.9%	5.0%	13.9%	10.9%	5.8%	8.9%	4.5%	11.4%	6.1%	3.9%	8.0%	4.5%	8.4%
a web site for a specific attraction	7.3%	5.2%	19.9%	7.4%	9.7%	7.1%	13.4%	24.7%	14.2%	3.7%	11.7%	12.7%	10.9%
a web site of a ticket/excursion booking company	2.1%	1.7%	5.1%	2.2%	5.0%	2.4%	5.7%	7.8%	8.8%	2.3%	3.0%	7.2%	3.9%
"what to do" web site	4.0%	3.0%	5.8%	3.8%	4.9%	3.8%	3.2%	4.8%	4.3%	1.4%	2.3%	9.5%	3.9%
A blog	1.1%	0.9%	0.3%	1.2%	3.6%	0.6%	1.2%	0.6%	0.3%	0.5%	1.9%	6.1%	0.9%
a social network site like Bebo and MySpace	1.1%	1.0%	0.6%	0.6%	4.1%	0.8%	1.0%	1.4%	1.2%	0.8%	0.7%	4.2%	1.0%
another kind of web site	4.2%	4.3%	6.6%	6.0%	10.1%	5.4%	7.7%	8.0%	8.0%	2.9%	8.6%	8.8%	5.9%
A tourist information office at the destination	4.5%	2.8%	7.4%	4.5%	6.7%	5.1%	2.8%	4.5%	3.4%	1.2%	5.7%	8.1%	4.5%
information from friends and family	21.3%	19.4%	23.9%	25.4%	32.0%	22.2%	17.8%	23.8%	21.2%	31.2%	22.1%	24.1%	23.1%
A guide book about the area	5.3%	3.3%	9.8%	8.9%	7.3%	5.3%	3.6%	5.2%	3.0%	2.2%	6.5%	6.4%	5.5%
a members guide book (like National Trust Handbook)	2.6%	1.0%	5.7%	3.1%	2.0%	3.4%	1.0%	1.2%	0.6%	0.3%	2.7%	7.3%	2.5%
Weighted Base	900	1,227	1,272	643	200	1,311	378	577	695	723	364	135	8,425

Planning the Day Out

When it comes to how far in advance people are planning a day trip, the majority (62%) of respondents plan their trip at least once week in advance. However, over a third, 35%, say that they normally go on the spur of the moment without any pre-planning happening. Another 3% of respondents say that they never go on a day trip.

Competitive Environment for Days Out

If we are to consider how we can encourage people to take more days out we need to understand their current behaviour and attitudes so that we can effectively target the message, provide the right incentives and remove the significant barriers.

Profile of regular participants in 'in home' leisure.

What people are currently doing in home is both competition to and an opportunity for promoting days out. The following section looks at those respondents regularly doing various in home leisure activities. Given the high incidence of in home leisure activity we have focused on those participating in a leisure activity at least once a week.

Table 17 shows the profile of regular participants in leisure activities by ArkLeisure segments. Watching TV is popular across all segments. Style Hounds are the most social amongst the segments with a lot of time spent chatting online or spending time with friends. In general; reading books, doing something creative, and pursuing hobbies at home are more popular among right side independently minded individuals. Playing video games also clearly differentiates the segments.

Table 17 Leisure activities done regularly (at least once a week) by ArkLeisure segmentation

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Watch TV/ DVDs/Videos at home	71.9%	78.4%	71.4%	68.0%	73.9%	66.4%	74.5%	74.3%	73.0%
Spend time surfing, chatting online	62.5%	76.0%	68.2%	54.4%	69.1%	57.2%	56.4%	65.7%	52.4%
Read a book for pleasure	49.4%	38.3%	54.3%	43.4%	50.6%	38.9%	63.1%	62.7%	47.7%
Spend time with friends	43.8%	56.7%	48.6%	40.2%	45.4%	36.9%	40.5%	43.8%	37.1%
Pursue a hobby/ interest (like gardening, photography etc)	36.8%	26.9%	43.5%	32.0%	39.0%	22.9%	44.6%	48.6%	39.3%
Spend time on a leisure activity at home with your partner/family	35.4%	41.2%	45.3%	30.8%	36.3%	26.8%	34.3%	32.2%	32.1%
Play video games	19.6%	33.2%	22.2%	16.3%	25.9%	14.9%	13.5%	16.3%	12.1%
Do something creative, artistic, or musical	17.9%	13.2%	26.2%	15.4%	17.6%	7.6%	21.2%	25.8%	13.5%
Weighted Base	5300	539	1009	959	670	680	554	482	407

Income is strongly associated with the frequency of most kinds of days out, but the relationship while still there is much less clear for in home activities as shown in
Table **18**. For example, being creative seems to be entirely independent of income.

Table 18 Leisure activities done regularly (at least once a week) by income

		Income							
	All respondents	Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
Watch TV/ DVDs/Videos at home	71.9%	69.4%	74.1%	70.8%	71.1%	73.7%	71.9%	65.9%	77.0%
Spend time surfing, chatting online	62.5%	62.0%	59.1%	61.9%	62.8%	66.4%	68.2%	65.6%	69.7%
Read a book for pleasure	49.4%	46.9%	49.9%	50.6%	49.7%	50.1%	47.3%	51.2%	48.0%
Spend time with friends	43.8%	46.9%	44.2%	42.5%	40.2%	44.7%	44.7%	46.2%	54.0%
Pursue a hobby/ interest (like gardening, photography etc)	36.8%	33.3%	40.5%	38.9%	36.1%	29.8%	36.2%	35.3%	30.7%
Spend time on a leisure activity at home with your partner/family	35.4%	28.8%	32.3%	36.7%	36.1%	41.0%	41.7%	38.5%	43.9%
Play video games	19.6%	20.7%	16.9%	19.8%	21.2%	19.4%	21.3%	17.7%	29.7%
Do something creative, artistic, or musical	17.9%	19.8%	19.1%	17.4%	15.9%	17.7%	15.7%	21.2%	17.8%
Weighted Base	5300	690	1399	1155	869	540	436	131	80

The in home activities done regularly by Arkleisure segments, for example Cosmopolitans' and Functionals' interest in creativity which relates to their interest in going to art galleries, and Style Hounds' interest in socialising which relates to their love of partying and nights out, shows there is a relationship between what people will do at home and what they will do out of home.

Understanding the Relationship Between Home and Outside Leisure

In order to better understand the mix of leisure activities people are considering in home we have prepared a simple grouping of people based on their at home behaviours. If we can link particular groups of people in terms of their at home activity should be able to better identify what competitive choices of home activity are being made over days out. Are these groups interested in specific types of day trips, which could be used to help decide in which medium to advertise for specific attractions?

In order to be able to group respondents in different leisure activity groups we ran a cluster analysis on their different in home leisure activities. This analysis produced 6 distinct groups each with very different leisure behaviour.

We identified 6 different leisure activity groups. The great majority of all but one group spend time watching TV and videos etc. Aside from this:

- The Online Recreationalist – focussed primarily on activities online. None of them are interested in books or creative activities though quite a few play video games.
- Home entertainers are all active online but are also the group most likely to read books for pleasure. The majority of this group are women.
- Young Socialisers – appear to have lots of leisure time and the majority take part in a wide variety of leisure activities every week. They are particularly interested in socialising and are mainly from males and from the younger age groups.
- Readers like home entertainers read books but none of them spend much time online. The

majority of this group can be found in the older age groups.

- Creative Hobbyists as the name suggests are doing creative artistic or musical things on a weekly basis, most are also interested hobbies and spending time with the rest of the household. The majority of this group are women.

- 'Inactive at Home' the last group has very low activity rates for doing any of these leisure activities at home. This could be because they spend little time at home, have little leisure time or simply prefer to do other things! Interestingly out of home this group has contrasting behaviour they are the second most active takers of many categories of day out.

The table below shows the proportion of respondents in each segment who do the various leisure activities every week. Figures highlighted in red are at least 50% higher than the average, those in orange are at between 50% and 20% higher than the average and those in blue are at least 20% lower than the average of all respondents. Figure 5 shows the size of each of the leisure activity segments.

Table 19 Leisure activities done regularly (every week) by leisure activity groups

	All respondents	Online Recreationalist	Home entertainers	Young Socialisers	Readers	Creative Hobbyist	Inactive at home
Watch TV/ DVDs/Videos at home	72%	75%	81%	88%	70%	80%	39%
Spend time surfing, chatting online	63%	**98%**	**100%**	92%	0%	74%	0%
Read a book for pleasure	49%	0%	**98%**	54%	**85%**	67%	0%
Spend time with friends	44%	36%	46%	**81%**	41%	58%	16%
Pursue a hobby/ interest (like gardening, photography etc)	37%	19%	34%	**62%**	37%	**73%**	14%
Spend time on a leisure activity at home with your partner/family	35%	24%	38%	**64%**	36%	**54%**	11%
Play video games	20%	20%	17%	**50%**	10%	20%	9%
Do something creative, artistic, or musical	18%	0%	0%	25%	2%	**99%**	4%
Go out in the evening, to pub/ night club etc	17%	12%	12%	**59%**	12%	14%	7%
Play a sport	14%	6%	4%	**67%**	10%	9%	6%
Eat Out (at a sit down restaurant)	10%	5%	9%	**34%**	9%	10%	4%
Total	100%	100%	100%	100%	100%	100%	100%
Weighted Base	5300	1167	1063	846	604	864	755

Figure 5 Proportion of respondents in leisure activity groups

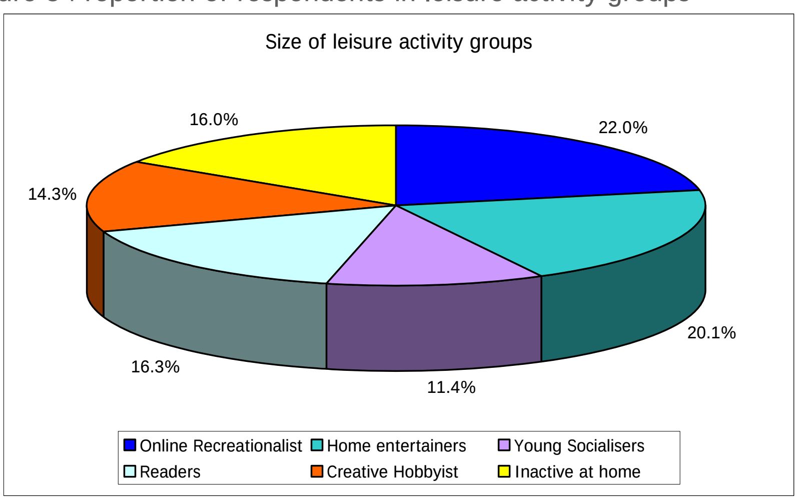


Table 20 summarises the profiles of the different leisure groups by age, gender, lifestage, income and the average number of trips outside their usual environment they have taken in the past 3 months. Young Socialisers are mostly young, male and more likely than the other groups from the higher income brackets. Style Hounds and Cosmopolitan are more likely to be found in this group than the others. They are the most active group when it comes to tourism day trips. Readers are mainly older people without children in the household. Online Leisure are the group who are least active when it comes to day trips, however, they still go out. This shows that neither of the groups are completely against day trips – they therefore could possibly convinced to go on more trips than they are doing at the moment.

Table 20 Pen portraits of leisure activity groups

		All respondents	Online Leisure	Home entertainers	Young Socialisers	Readers	Creative Hobbyist	Inactive at home
Age	16-24	11%	10%	6%	**28%**	3%	12%	11%
	25-34	16%	21%	16%	24%	8%	12%	17%
	35-44	20%	23%	22%	19%	16%	17%	20%
	45-54	17%	19%	19%	13%	16%	14%	15%
	55-64	15%	12%	15%	10%	21%	17%	17%
	above 65	21%	14%	22%	7%	**37%**	27%	20%
Gender	Male	47%	55%	36%	66%	40%	33%	55%
	Female	53%	45%	64%	34%	60%	67%	45%
lifestage	Live alone	18%	15%	21%	12%	19%	23%	15%
	Live with partner only	27%	23%	29%	24%	32%	27%	28%
	House/Flat share	9%	11%	7%	**16%**	5%	9%	10%
	Family with children under 15	18%	22%	17%	21%	12%	13%	20%
	Family with children over 15	13%	15%	12%	13%	12%	13%	12%
	Empty nesters	15%	14%	14%	13%	19%	14%	14%
Household Income	Under £10,000	13%	14%	12%	7%	14%	16%	13%
	£10-19999	26%	26%	27%	17%	29%	30%	27%
	£20-29999	22%	22%	20%	21%	24%	22%	22%
	£30-39999	16%	16%	19%	17%	14%	14%	18%
	£40-49999	10%	10%	11%	14%	9%	9%	9%
	£50,000-74,999	8%	8%	8%	**15%**	7%	6%	7%
	£75,000- 99,999	2%	2%	2%	**5%**	3%	2%	2%
	over £100,000	2%	1%	1%	**4%**	0%	1%	2%
Origin	South/South East	14%	13%	14%	15%	15%	15%	16%
	London	12%	12%	9%	18%	9%	11%	19%
	South West	9%	8%	10%	8%	9%	10%	9%
	North East	5%	5%	6%	5%	5%	5%	3%
	North West	11%	11%	13%	11%	12%	12%	10%
	Yorkshire	8%	9%	8%	7%	8%	9%	7%
	West Midlands	9%	11%	9%	10%	7%	9%	9%
	East Midlands	8%	9%	9%	6%	8%	6%	7%
	East	9%	9%	9%	8%	11%	10%	9%
	Scotland	9%	10%	10%	9%	9%	9%	8%
	Wales	5%	4%	4%	5%	**8%**	5%	3%
Ark Leisure Segmentation	Style Hounds	10%	14%	9%	**21%**	6%	5%	7%
	Cosmopolitans	19%	16%	19%	28%	15%	27%	15%
	High Street	18%	17%	15%	17%	18%	17%	27%
	Discoverers	13%	14%	14%	14%	10%	13%	10%
	Followers	13%	17%	12%	8%	13%	6%	19%
	Traditionals	10%	7%	12%	5%	**17%**	14%	7%
	Functionals	9%	7%	11%	6%	10%	**14%**	6%
	Habituals	8%	8%	8%	2%	11%	6%	10%
Average number of tourism trips in past 3 months	A trip to the beach/ seaside	1.4	1.2	1.4	1.3	1.6	1.7	1.1
	Go on a special shopping trip outside your usual environment	2.2	1.9	2.1	2.9	2.1	2.3	2.0
	Visit any kind of tourist/ visitor attraction	1.4	1.1	1.4	1.8	1.5	1.9	1.1
	Undertake a leisure activity (walking, cycling, water sports, etc.)	2.0	1.5	1.9	2.8	1.9	2.7	1.7
	Participate in a sports event/ competition	0.8	0.5	0.4	**1.6**	0.8	0.7	0.9
	Go on a general day out/ to explore an area	1.9	1.4	1.9	2.4	1.9	2.6	1.4
	Watch a sport event	1.1	1.1	0.8	**1.6**	0.7	0.9	1.2
	Attend a special event (festival, exhibition, etc)	0.7	0.6	0.6	1.0	0.6	1.0	0.9
	Attend an entertainment (cinema, concert, theatre)	0.8	0.7	0.6	1.2	0.6	1.0	0.8
	Go for a night out (meal/ drinks/ clubbing/ socialising/ party)	1.6	1.4	1.6	**2.5**	1.5	1.7	1.4
	Participate in a hobby (out of home)	1.3	1.0	1.0	1.9	1.0	1.8	1.2
	Go for a day out to a beauty/health centre/ spa etc	0.5	0.3	0.4	0.6	0.3	0.4	0.7

Attitudes towards days out

In order to discover how people view days out we asked them to respond to several statements, which described different attitudes towards going on a day out. The following tables show the proportions of respondents strongly agreeing with each individual statement, (i.e. those who scored the statement with at least 8 out of 10).

Almost half of all respondents (47%) strongly agree with the statement that having a day out creates a good memory and almost as many (46%) agree that getting away for the day refreshes them. However, 25% of respondents also agree with the statement that the expense of a day out discourages them from going on many day trips. This is the greatest perceived barrier to going out with all the other barriers recognised by 15% or less of the population. Lack of knowledge of the options is only claimed by 9% of people.

Peoples attitudes are however very clearly associated with their propensity to go out. Table 21 shows that there is a high degree of correlation between recognition of the barriers and lack of activity. In general two to three times more people who never go out recognise each of the barriers compare to those doing a large variety of trips. There is less of a contrast in the recognition that trips can create good memories and refresh you. This suggests that it is the barriers rather than a lack of recognition of the benefits that is deterring people.

Table 21 Number of different types of day trip attractions visited in past 12 months by those agreeing strongly with day trip statement

	All respondents	It's a real effort to organise days out	I prefer spending time around the house than going out	Getting away for the day always refreshes me	Having a day out always creates a good memory	I try to minimise the amount I travel outside of work	The expense of going out for the day discourages me from doing much	Looking after the garden, house and household gives me little time to go out for the day	I really don't know what there is to do for a day out in the local area	I would do more days out but my partner/ family aren't keen
None	12.0%	22.2%	26.9%	9.1%	8.2%	24.5%	18.2%	19.0%	21.2%	17.2%
1-5	29.0%	33.4%	35.3%	26.3%	26.2%	29.1%	34.7%	32.7%	32.8%	30.8%
6-10	29.2%	23.0%	18.9%	32.8%	33.5%	21.7%	26.5%	25.4%	20.6%	26.8%
11-15	18.1%	11.8%	10.5%	21.4%	21.5%	14.0%	12.7%	12.2%	13.1%	12.7%
more than 15	11.7%	9.6%	8.4%	10.4%	10.6%	10.7%	7.9%	10.7%	12.4%	12.5%
Mean	7.5	5.9	5.2	7.9	8.0	6.1	6.1	6.3	6.3	6.7
Weighted Base	5300	706	871	2439	2508	587	1306	727	488	550

There are some significant differences in the perceptions of the different ArkLeisure segments. Habituals are the ArkLeisure segment that are most likely to agree with the negative statements, like a preference to spend time at home, trying to minimise travel outside work and that day trips are too much effort to organise.

Style Hounds and Cosmopolitans strongly agree that day trips create good memories and are refreshing. Very few people think that they do not know what there is to do in their local area. However, we generally find that awareness levels for many attractions are low suggesting that the truth of the matter differs from their perception.

High Streets show little inclination to strongly agree with any of the statements (positive or negative, suggesting that few of them have formed clear opinions.

Table 22 Respondents agreeing strongly with day trip statement by ArkLeisure segments

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Having a day out always creates a good memory	47.3%	61.9%	61.6%	33.8%	49.5%	32.2%	48.6%	49.2%	42.0%
Getting away for the day always refreshes me	46.0%	53.9%	61.2%	30.2%	47.4%	32.8%	50.7%	50.6%	43.2%
The expense of going out for the day discourages me from doing much	24.6%	22.0%	23.3%	15.2%	26.3%	27.6%	25.6%	31.8%	36.3%
I prefer spending time around the house than going out	16.4%	11.4%	14.6%	12.0%	15.6%	17.4%	18.2%	17.4%	34.4%
Looking after the garden, house and household gives me little time to go out for the day	13.7%	14.1%	14.8%	9.8%	14.4%	11.7%	15.3%	14.7%	18.9%
It's a real effort to organise days out	13.3%	13.4%	15.9%	7.9%	12.2%	11.5%	14.6%	14.8%	21.1%
I try to minimise the amount I travel outside of work	11.1%	7.2%	12.2%	6.7%	10.6%	8.8%	12.4%	17.6%	18.7%
I would do more days out but my partner/ family aren't keen	10.4%	11.2%	14.3%	7.1%	9.3%	8.1%	9.8%	9.6%	14.3%
I really don't know what there is to do for a day out in the local area	9.2%	15.6%	11.7%	5.7%	8.7%	7.9%	5.7%	7.4%	12.8%
Weighted Base	5300	539	1009	959	670	680	554	482	407

More women than men strongly agree with many of the statements. They are much more likely to consider that a day out will create positive memories these statements, and refreshes them. They are also more likely to be constrained by their partners' attitude and their domestic workload. The differences in the different age groups are not as pronounced though young people seem to be less aware of what there is to do in their local area and keener to get out the house.

Table 23 Respondents agreeing strongly with day trip statement by age and gender

		Age						Gender	
	All respondents	16-24	25-34	35-44	45-54	55-64	above 65	Male	Female
Having a day out always creates a good memory	47.3%	45.7%	49.0%	47.5%	42.1%	47.3%	50.8%	38.0%	55.6%
Getting away for the day always refreshes me	46.0%	38.6%	44.0%	44.0%	44.0%	51.6%	50.7%	38.8%	52.4%
The expense of going out for the day discourages me from doing much	24.6%	25.4%	28.1%	25.6%	27.5%	20.1%	21.8%	20.5%	28.3%
I prefer spending time around the house than going out	16.4%	13.0%	14.7%	15.4%	17.8%	17.7%	18.4%	16.3%	16.6%
Looking after the garden, house and household gives me little time to go out for the day	13.7%	9.4%	16.4%	15.4%	16.0%	11.9%	11.9%	10.4%	16.6%
It's a real effort to organise days out	13.3%	15.2%	16.0%	12.9%	13.4%	11.3%	12.1%	12.0%	14.4%
I try to minimise the amount I travel outside of work	11.1%	7.8%	10.1%	10.5%	11.7%	9.7%	14.4%	11.6%	10.6%
I would do more days out but my partner/ family aren't keen	10.4%	12.2%	11.4%	7.4%	10.2%	11.1%	11.0%	7.3%	13.0%
I really don't know what there is to do for a day out in the local area	9.2%	18.3%	14.3%	8.0%	7.7%	6.8%	4.9%	8.8%	9.6%
Weighted Base	5300	562	862	1056	884	805	1131	2483	2817

Looking at the attitudes towards day trips by lifestage shows that families, firstly with children under 15 then those with children over 15, are most likely to be discouraged to go on a day trip because of the expense that is involved. These groups may well have the least disposable income. Families are also the groups that are most likely to lack the time to go on day trips because of household chores. Some older families find it difficult to organise trips that everyone is interested in, probably reflecting the fact that it is increasingly difficult to convince growing up children that going out for the day with your parents can be fun.

Table 24 Respondents agreeing strongly with day trip statement by lifestage

		Lifestage					
	All respondents	Live alone	Live with partner only	House/Flat share	Family with children under 15	Family with children over 15	Empty nesters
Having a day out always creates a good memory	47.3%	44.1%	46.3%	43.1%	54.2%	48.1%	46.9%
Getting away for the day always refreshes me	46.0%	45.6%	47.2%	45.9%	44.5%	46.8%	45.2%
The expense of going out for the day discourages me from doing much	24.6%	25.4%	21.5%	26.8%	29.8%	28.4%	18.5%
I prefer spending time around the house than going out	16.4%	18.5%	16.3%	16.8%	15.8%	13.2%	17.7%
Looking after the garden, house and household gives me little time to go out for the day	13.7%	12.2%	12.3%	11.5%	19.8%	14.9%	11.4%
It's a real effort to organise days out	13.3%	15.1%	10.5%	15.6%	15.6%	15.3%	10.6%
I try to minimise the amount I travel outside of work	11.1%	14.9%	11.1%	11.2%	10.6%	6.3%	10.7%
I would do more days out but my partner/ family aren't keen	10.4%	5.7%	11.4%	13.0%	8.6%	12.9%	12.3%
I really don't know what there is to do for a day out in the local area	9.2%	9.9%	7.2%	13.1%	11.9%	9.5%	6.2%
Weighted Base	5300	937	1444	496	929	687	777

Income clearly has a strong impact on propensity to take days out. Lower income households are more likely to be worried about the expense, find days out harder to organise, be least likely to know what there is to do in the local area, and express a preference for staying at home (possibly associated with lower income OAPs etc).

Table 25 Respondents agreeing strongly with day trip statement by income

		Income							
	All respondents	Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
Having a day out always creates a good memory	47.3%	45.6%	51.6%	49.7%	44.0%	46.8%	41.0%	37.2%	42.3%
Getting away for the day always refreshes me	46.0%	43.2%	51.4%	48.9%	41.6%	46.1%	37.4%	40.1%	37.1%
The expense of going out for the day discourages me from doing much	24.6%	**38.7%**	29.3%	22.5%	20.3%	18.3%	14.8%	16.6%	10.5%
I prefer spending time around the house than going out	16.4%	22.9%	20.2%	15.8%	14.0%	9.1%	12.2%	15.0%	7.1%
Looking after the garden, house and household gives me little time to go out for the day	13.7%	14.4%	16.0%	13.0%	11.8%	13.0%	13.2%	12.5%	8.9%
It's a real effort to organise days out	13.3%	19.1%	13.7%	12.8%	10.6%	11.7%	12.8%	15.9%	4.8%
I try to minimise the amount I travel outside of work	11.1%	12.3%	13.4%	10.3%	10.8%	8.9%	8.3%	10.1%	5.3%
I would do more days out but my partner/ family aren't keen	10.4%	10.8%	11.7%	11.6%	9.0%	9.0%	7.7%	9.5%	6.0%
I really don't know what there is to do for a day out in the local area	9.2%	**15.1%**	8.5%	7.4%	8.7%	8.7%	7.6%	10.5%	13.0%
Weighted Base	5300	690	1399	1155	869	540	436	131	80

There is little differentiation in the attitudes of people to days out by region. The lower activity rate in the East Midlands is reflected in a more negative perception of days out but the differences are relatively minor. Londoners seem to be the group least aware of what there is to do in their local area. Given the multitude of national attractions in London this must either reflect a personal desire to do something 'different/obscure' (ie less obvious options – that are lost in the scale and noise of London) or perhaps a difference in the definition of 'local'.

Table 26 Respondents agreeing strongly with day trip statement by origin

		Origin										
	All respondents	South/ South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
Having a day out always creates a good memory	47.3%	45.9%	44.5%	49.9%	52.8%	46.5%	48.1%	45.5%	47.4%	45.6%	49.5%	52.0%
Getting away for the day always refreshes me	46.0%	44.3%	42.3%	43.1%	54.5%	48.0%	49.6%	42.8%	46.8%	45.8%	47.8%	49.1%
The expense of going out for the day discourages me from doing much	24.6%	27.4%	25.6%	21.3%	23.1%	22.7%	24.9%	29.1%	29.6%	19.9%	22.7%	22.1%
I prefer spending time around the house than going out	16.4%	15.6%	16.8%	16.8%	16.5%	13.7%	15.2%	16.8%	19.0%	16.6%	18.7%	16.5%
Looking after the garden, house and household gives me little time to go out for the day	13.7%	13.9%	14.8%	13.4%	15.3%	14.1%	11.9%	15.1%	13.5%	14.0%	12.2%	11.7%
It's a real effort to organise days out	13.3%	15.2%	16.2%	12.4%	9.5%	12.3%	12.4%	12.0%	16.1%	13.0%	10.6%	13.4%
I try to minimise the amount I travel outside of work	11.1%	12.4%	12.4%	11.9%	16.4%	9.3%	7.2%	10.1%	11.6%	9.1%	10.2%	14.1%
I would do more days out but my partner/ family aren't keen	10.4%	9.8%	11.3%	7.4%	12.0%	9.3%	8.5%	12.0%	13.4%	8.6%	10.9%	13.8%
I really don't know what there is to do for a day out in the local area	9.2%	8.5%	**14.8%**	4.6%	9.3%	9.8%	7.8%	12.0%	9.4%	5.5%	9.7%	7.0%
Weighted Base	5300	762	660	466	243	608	428	486	408	498	486	255

The leisure activity groups we established earlier, all tend to agree that having a day out creates good memories and refreshes. However this is much less the case for the 'Inactive at Home' despite their greater number of day out activities. Young Socialisers have a very positive attitude to overcoming the potential barriers and disincentives to going out. Online Leisure are much more likely to object to the expense, prefer remaining at home (presumably online) and are less likely to be aware of what they could do locally.

Table 27 Respondents agreeing strongly with day trip statement by leisure activity groups

	All respondents	Online Recreatio	Home entertainers	Young Socialisers	Readers	Creative Hobbyist	Inactive at home
Having a day out always creates a good memory	47.3%	45.0%	51.2%	52.8%	46.1%	55.4%	35.8%
Getting away for the day always refreshes me	46.0%	43.2%	50.7%	46.4%	49.8%	53.0%	33.6%
The expense of going out for the day discourages me from doing much	24.6%	30.0%	25.0%	17.2%	21.9%	28.2%	21.8%
I prefer spending time around the house than going out	16.4%	20.0%	15.5%	10.5%	14.7%	16.3%	18.8%
Looking after the garden, house and household gives me little time to go	13.7%	15.4%	14.2%	9.3%	13.0%	12.3%	16.0%
It's a real effort to organise days out	13.3%	15.5%	12.9%	9.3%	12.2%	13.1%	15.1%
I try to minimise the amount I travel outside of work	11.1%	10.7%	10.5%	10.4%	8.8%	13.2%	13.1%
I would do more days out but my partner/ family aren't keen	10.4%	11.7%	9.3%	8.4%	8.4%	12.3%	11.7%
I really don't know what there is to do for a day out in the local area	9.2%	13.5%	8.2%	10.1%	6.3%	6.4%	9.5%
Weighted Base	5300	1167	1063	604	864	755	846

Conclusion

In conclusion it appears that only approximately 50% of the population recognise that going for a day trip can refresh and create good memories. There is therefore a considerable task to be done to convince more people of the positive benefits of a day out.

Secondly, in practical terms the perceived barriers of expense and effort are effective deterrents to trip taking. These are far more difficult to influence as they are both highly personal and may reflect real economic circumstances as well as the perceived relative 'value for money' achieved by going out.

Functionals and Habituals will be the most difficult to persuade, though as these are smaller and less valuable groups they are fortunately not high value markets. High Streets (and to a lesser extent Followers) have tended not to express strong opinions either way. These are the most persuadable groups however they are also difficult to motivate, therefore they need easy things to do whose benefits can be immediately seen. They will not look for DIY options.

The Role of Visitor Attractions

What People Want to Do on A Day Out

So far in this section we have looked at which activities people have done on the day trips that they have been on recently. Following, we are looking at the kinds of things different groups of people are really interested in doing. 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. These tend to be the days out most preferred by all groups.

The ArkLeisure segments have clear preferences for their days out. Shopping trips and Nights out/ drinks/ clubbing are really Style Hounds 'kind of thing'. Many Cosmopolitans are interested in all kinds of attraction but Historic Sites, Stately homes and Nights out are all particularly popular with these groups. High Street, Followers and Habituals are less likely than others to rate any kinds of trips as being their 'kind of thing'. Functionals are highly orientated towards museums of any kind. Traditionals are a lot more likely to select Historic Sites and Castles, Gardens, Stately Homes and Palaces, Cathedrals and Art Collections and Galleries. Discoverers reflect their disparate interests with a divergent mix of interests across all categories.

Table 28 Preferred types of day trips by ArkLeisure segments

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Going for a walk somewhere new	36.8%	33%	53%	29%	39%	26%	40%	43%	23%
Just a bit of general exploration	36.2%	31%	52%	26%	42%	18%	41%	47%	29%
A trip to the beach/ seaside	35.2%	49%	46%	27%	38%	26%	34%	29%	33%
Good shopping opportunities	30.3%	**53%**	45%	24%	25%	24%	22%	18%	21%
Historic Sites & Castles	23.8%	15%	**40%**	16%	22%	9%	**37%**	31%	15%
A night out (drinks/ clubbing/ socialising)	22.4%	**50%**	30%	16%	24%	19%	11%	14%	12%
Gardens	18.2%	8%	**31%**	16%	15%	6%	**27%**	22%	15%
Watching a sporting event	18.1%	**33%**	25%	15%	19%	13%	14%	12%	8%
Zoos/ Zoological Gardens	17.3%	23%	25%	13%	17%	12%	15%	16%	15%
Stately Homes & Palaces	16.8%	10%	**29%**	12%	11%	8%	**26%**	19%	14%
Cathedrals/ Churches/ Abbeys	15.8%	7%	**26%**	12%	11%	6%	**26%**	22%	13%
History Museums	15.2%	8%	**29%**	9%	15%	4%	20%	22%	10%
Aquariums and Sealife Centres	14.5%	20%	20%	11%	17%	9%	12%	14%	11%
Botanical Gardens (eg. Kew)	14.5%	8%	**25%**	13%	12%	4%	21%	17%	10%
Science Museums	13.4%	9%	**25%**	9%	17%	4%	15%	17%	5%
An activity (e.g. cycling, water sports, etc.)	13.1%	**22%**	**21%**	8%	17%	8%	7%	13%	5%
Pleasure Beaches (eg. Blackpool, Great Yarmouth)	12.9%	**28%**	18%	9%	15%	9%	7%	7%	7%
Safari Parks	12.2%	**19%**	**19%**	10%	13%	8%	8%	8%	8%
White Knuckle Theme Parks (eg. Alton Towers)	12.1%	**33%**	17%	8%	15%	9%	4%	5%	3%
Art Collections and Galleries (eg. National Gallery)	11.7%	5%	**25%**	9%	7%	1%	**19%**	16%	4%
Family Theme Parks (eg. Thorpe Park, Legoland)	11.6%	**28%**	16%	8%	14%	9%	4%	5%	4%
Attending an arts festival	8.7%	5%	**20%**	6%	5%	1%	12%	12%	1%
Modern & Contemporary Art (eg. Tate Modern)	8.2%	5%	**19%**	7%	5%	1%	11%	9%	2%
Transport Museums	8.0%	3%	**13%**	6%	8%	3%	11%	11%	8%
Weighted Base	5300	539	1009	959	670	680	554	482	407

Table 29 shows what different age and gender groups are interested in. There are some clear differences. Going for a night out, theme parks and sporting activities are mainly the domain of the young, whereas gardens, stately homes and palaces, cathedrals and churches, botanical gardens etc are favoured by the older age groups. Watching a sporting event is much more a man's 'kind of thing' than woman's.

Table 29 Preferred types of day trips by age and gender

		Age						Gender	
	All respondents	16-24	25-34	35-44	45-54	55-64	above 65	Male	Female
Going for a walk somewhere new	36.8%	29%	39%	36%	37%	41%	36%	33%	40%
Just a bit of general exploration	36.2%	28%	35%	35%	37%	42%	37%	33%	39%
A trip to the beach/ seaside	35.2%	33%	41%	39%	37%	35%	26%	29%	41%
Good shopping opportunities	30.3%	43%	36%	26%	27%	27%	29%	19%	41%
Historic Sites & Castles	23.8%	14%	18%	23%	24%	28%	31%	22%	26%
A night out (drinks/ clubbing/ socialising)	22.4%	**45%**	**34%**	24%	19%	13%	10%	23%	22%
Gardens	18.2%	7%	10%	13%	14%	27%	**31%**	14%	22%
Watching a sporting event	18.1%	26%	24%	19%	17%	15%	11%	**28%**	9%
Zoos/ Zoological Gardens	17.3%	18%	**28%**	21%	15%	12%	10%	13%	21%
Stately Homes & Palaces	16.8%	8%	11%	15%	14%	22%	**26%**	13%	20%
Cathedrals/ Churches/ Abbeys	15.8%	8%	8%	12%	13%	19%	**29%**	13%	18%
History Museums	15.2%	9%	12%	15%	15%	17%	20%	14%	17%
Aquariums and Sealife Centres	14.5%	19%	**23%**	18%	12%	10%	8%	11%	17%
Botanical Gardens (eg. Kew)	14.5%	7%	9%	10%	13%	20%	**24%**	11%	17%
Science Museums	13.4%	10%	15%	15%	13%	13%	13%	15%	12%
An activity (e.g. cycling, water sports, etc.)	13.1%	**24%**	19%	13%	11%	10%	7%	16%	11%
Pleasure Beaches (eg. Blackpool, Great Yarmouth)	12.9%	**21%**	**20%**	17%	11%	8%	5%	12%	14%
Safari Parks	12.2%	15%	**22%**	17%	9%	6%	5%	9%	15%
White Knuckle Theme Parks (eg. Alton Towers)	12.1%	**31%**	**25%**	16%	6%	2%	1%	12%	12%
Art Collections and Galleries (eg. National Gallery)	11.7%	10%	10%	9%	11%	12%	17%	9%	14%
Family Theme Parks (eg. Thorpe Park, Legoland)	11.6%	**25%**	**22%**	**18%**	7%	3%	1%	9%	14%
Attending an arts festival	8.7%	9%	9%	7%	8%	7%	11%	7%	10%
Modern & Contemporary Art (eg. Tate Modern)	8.2%	10%	9%	7%	8%	8%	9%	7%	9%
Transport Museums	8.0%	4%	5%	7%	7%	12%	11%	12%	5%
Weighted Base	5300	562	862	1056	884	805	1131	2483	2817

Family circumstances also influence the type of day trips people are really interested in. White knuckle theme parks, family theme parks, zoos, aquariums and sea life centres as well as pleasure beaches and a general trip to the beach/seaside are mainly favoured by families with children.

More expensive activities like going to watch a sporting event (especially when it is a match of football premiership teams), physical activities like walking and art related activities like going to the Tate Modern are more in favour with those earning higher salaries.

Table 30 Preferred types of day trips by income

		Income							
	All respondents	Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
Going for a walk somewhere new	36.8%	34%	37%	38%	36%	39%	37%	35%	39%
Just a bit of general exploration	36.2%	32%	38%	38%	37%	36%	33%	30%	33%
A trip to the beach/ seaside	35.2%	35%	36%	36%	34%	38%	32%	27%	34%
Good shopping opportunities	30.3%	30%	31%	31%	27%	29%	31%	32%	34%
Historic Sites & Castles	23.8%	20%	25%	26%	25%	24%	19%	22%	24%
A night out (drinks/ clubbing/ socialising)	22.4%	20%	19%	22%	23%	29%	26%	29%	33%
Gardens	18.2%	16%	21%	20%	18%	16%	14%	12%	15%
Watching a sporting event	18.1%	9%	13%	18%	20%	**28%**	**29%**	26%	26%
Zoos/ Zoological Gardens	17.3%	14%	17%	18%	19%	19%	16%	19%	22%
Stately Homes & Palaces	16.8%	15%	17%	19%	17%	14%	14%	19%	19%
Cathedrals/ Churches/ Abbeys	15.8%	15%	18%	17%	16%	12%	12%	14%	17%
History Museums	15.2%	13%	16%	17%	15%	14%	14%	13%	13%
Aquariums and Sealife Centres	14.5%	13%	14%	16%	15%	15%	14%	13%	13%
Botanical Gardens (eg. Kew)	14.5%	11%	15%	18%	14%	12%	14%	14%	16%
Science Museums	13.4%	10%	12%	15%	14%	13%	17%	16%	**25%**
An activity (e.g. cycling, water sports, etc.)	13.1%	13%	8%	14%	14%	16%	17%	**20%**	**25%**
Pleasure Beaches (eg. Blackpool, Great Yarmouth)	12.9%	12%	13%	14%	14%	14%	11%	9%	12%
Safari Parks	12.2%	9%	11%	13%	13%	18%	11%	10%	9%
White Knuckle Theme Parks (eg. Alton Towers)	12.1%	8%	9%	11%	15%	18%	**19%**	14%	14%
Art Collections and Galleries (eg. National Gallery)	11.7%	8%	12%	11%	11%	12%	14%	15%	**19%**
Family Theme Parks (eg. Thorpe Park, Legoland)	11.6%	10%	9%	12%	13%	17%	13%	7%	15%
Attending an arts festival	8.7%	8%	9%	10%	7%	8%	9%	8%	8%
Modern & Contemporary Art (eg. Tate Modern)	8.2%	5%	7%	9%	7%	9%	12%	**13%**	11%
Transport Museums	8.0%	6%	8%	9%	8%	7%	8%	7%	**13%**
Weighted Base	5300	690	1399	1155	869	540	436	131	80

There are not great variations in preferences by region.

Table 31 Preferred types of day trips by origin

		Origin										
	All respondents	South/ South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
Going for a walk somewhere new	36.8%	34%	35%	40%	42%	37%	37%	34%	36%	42%	36%	40%
Just a bit of general exploration	36.2%	36%	32%	38%	40%	36%	35%	34%	36%	41%	37%	38%
A trip to the beach/ seaside	35.2%	37%	35%	32%	26%	35%	41%	37%	38%	38%	30%	33%
Good shopping opportunities	30.3%	29%	31%	27%	30%	33%	28%	32%	30%	31%	29%	35%
Historic Sites & Castles	23.8%	25%	19%	25%	23%	26%	26%	22%	21%	29%	19%	28%
A night out (drinks/ clubbing/ socialising)	22.4%	20%	26%	20%	23%	21%	24%	24%	24%	18%	25%	25%
Gardens	18.2%	17%	15%	23%	18%	21%	20%	15%	16%	24%	13%	20%
Watching a sporting event	18.1%	18%	23%	18%	19%	19%	18%	19%	16%	13%	18%	17%
Zoos/ Zoological Gardens	17.3%	19%	18%	21%	11%	18%	12%	15%	18%	24%	13%	15%
Stately Homes & Palaces	16.8%	19%	16%	20%	18%	17%	18%	17%	17%	17%	11%	14%
Cathedrals/ Churches/ Abbeys	15.8%	16%	14%	16%	17%	17%	18%	14%	15%	19%	12%	16%
History Museums	15.2%	16%	16%	17%	16%	17%	17%	12%	13%	15%	13%	15%
Aquariums and Sealife Centres	14.5%	15%	16%	15%	11%	12%	15%	13%	17%	16%	16%	13%
Botanical Gardens (eg. Kew)	14.5%	16%	17%	17%	13%	14%	11%	11%	11%	17%	14%	17%
Science Museums	13.4%	16%	18%	12%	15%	13%	11%	10%	11%	16%	11%	13%
An activity (e.g. cycling, water sports, etc.)	13.1%	13%	18%	12%	15%	12%	12%	13%	9%	13%	12%	15%
Pleasure Beaches (eg. Blackpool, Great Yarmouth)	12.9%	12%	16%	6%	11%	17%	15%	14%	16%	12%	10%	10%
Safari Parks	12.2%	15%	12%	14%	6%	10%	10%	13%	12%	15%	12%	11%
White Knuckle Theme Parks (eg. Alton Towers)	12.1%	13%	15%	8%	9%	12%	12%	16%	11%	10%	11%	13%
Art Collections and Galleries (eg. National Gallery)	11.7%	12%	15%	12%	12%	12%	10%	10%	10%	11%	12%	8%
Family Theme Parks (eg. Thorpe Park, Legoland)	11.6%	13%	**18%**	8%	8%	10%	10%	13%	12%	11%	9%	11%
Attending an arts festival	8.7%	10%	11%	9%	8%	10%	8%	8%	5%	8%	8%	5%
Modern & Contemporary Art (eg. Tate Modern)	8.2%	9%	**13%**	6%	7%	10%	7%	7%	6%	7%	7%	6%
Transport Museums	8.0%	8%	7%	9%	8%	8%	8%	5%	5%	11%	10%	10%
Weighted Base	5300	762	660	466	243	608	428	486	408	498	486	255

What people are doing in their leisure time at home is also correlated with their preferences for days out. Those in the 'Online recreation' and 'Inactive at Home' groups are more negative about all kinds of days out (except for some interest in pleasure beaches and family theme parks. Creative Hobbyists are a lot more interested in historic pursuits and arts trips, but also visiting museums.

Table 32 Preferred types of day trips by Leisure categories

		Activity Leisure Group					
	All respondents	Online Recreationalist	Home entertainers	Young Socialisers	Readers	Creative Hobbyist	Inactive at home
Going for a walk somewhere new	36.8%	29%	43%	44%	37%	47%	26%
Just a bit of general exploration	36.2%	31%	42%	39%	37%	46%	25%
A trip to the beach/ seaside	35.2%	35%	41%	42%	31%	36%	27%
Good shopping opportunities	30.3%	33%	32%	35%	27%	33%	22%
Historic Sites & Castles	23.8%	16%	29%	22%	28%	**36%**	14%
A night out (drinks/ clubbing/ socialising)	22.4%	25%	22%	**46%**	15%	17%	15%
Gardens	18.2%	12%	20%	16%	25%	27%	11%
Watching a sporting event	18.1%	18%	15%	**42%**	15%	11%	15%
Zoos/ Zoological Gardens	17.3%	16%	20%	21%	16%	18%	14%
Stately Homes & Palaces	16.8%	11%	22%	14%	20%	25%	11%
Cathedrals/ Churches/ Abbeys	15.8%	10%	19%	12%	21%	**24%**	10%
History Museums	15.2%	10%	18%	13%	18%	**25%**	9%
Aquariums and Sealife Centres	14.5%	15%	17%	17%	11%	16%	11%
Botanical Gardens (eg. Kew)	14.5%	9%	16%	15%	20%	22%	8%
Science Museums	13.4%	10%	15%	17%	12%	**21%**	8%
An activity (e.g. cycling, water sports, etc.)	13.1%	11%	10%	**33%**	9%	13%	11%
Pleasure Beaches (eg. Blackpool, Great Yarmouth)	12.9%	17%	14%	**23%**	6%	10%	10%
Safari Parks	12.2%	12%	14%	16%	10%	13%	9%
White Knuckle Theme Parks (eg. Alton Towers)	12.1%	14%	12%	**27%**	5%	9%	9%
Art Collections and Galleries (eg. National Gallery)	11.7%	5%	14%	12%	12%	**24%**	6%
Family Theme Parks (eg. Thorpe Park, Legoland)	11.6%	14%	11%	**22%**	6%	9%	10%
Attending an arts festival	8.7%	4%	9%	10%	6%	**21%**	7%
Modern & Contemporary Art (eg. Tate Modern)	8.2%	4%	8%	11%	7%	**17%**	5%
Transport Museums	8.0%	6%	8%	9%	8%	10%	8%
Total	100%	100%	100%	100%	100%	100%	100%
Weighted Base	5300	1167	1063	604	864	755	846

Attraction Visitor Profiles

The survey focused specifically on visitor attractions as these are the type of day trip most likely to prompt a day out outside people's usual environment (see Figure 4). The following tables presents the proportions of people visiting each type of attraction at least 3 times a year and the ArkLeisure profile for each attraction.

Overall traditional heritage sites are by far the most popular kind of attraction with almost universal appeal across all segments. The one group that will not be found there are Style Hounds. Style Hounds are much more interested in Theme Parks and Animal Parks; they make up 25% of the visitors to White Knuckle theme parks. The measure is not sufficiently sharp to distinguish strong preferences in the Cosmopolitans, and Discoverers segments as these groups visit every kind of attraction. Other segments do show very varied responses. For example Traditionals show particular interest in historical attractions.

Table 33 Types of attraction visited at least 3 to 4 times a year by ArkLeisure segmentation

	All	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Historic Sites & Castles	26.7%	8%	29%	19%	12%	7%	12%	8%	3%
National Trust Properties and Gardens	25.8%	6%	28%	20%	12%	9%	13%	9%	4%
Cathedrals/ Churches/ Abbeys	23.1%	6%	29%	21%	10%	6%	14%	9%	4%
History Museums	18.0%	7%	31%	19%	11%	7%	12%	10%	2%
Stately Homes & Palaces	18.0%	7%	30%	20%	11%	8%	13%	8%	4%
Art Collections and Galleries (e.g. National Gallery)	16.7%	6%	36%	19%	10%	5%	13%	10%	2%
Pleasure Beaches (Blackpool, Great Yarmouth)	15.6%	14%	26%	19%	14%	12%	7%	5%	5%
Zoos/ Zoological Gardens	13.6%	14%	29%	18%	11%	12%	6%	5%	4%
Botanical Gardens (e.g. Kew)	12.9%	6%	32%	23%	12%	7%	10%	7%	3%
Science Museums	11.8%	10%	31%	21%	13%	7%	8%	7%	4%
Modern & Contemporary Art (e.g. Tate Modern)	11.0%	8%	36%	20%	11%	5%	10%	8%	2%
Family Theme Parks (e.g. Thorpe Park, Legoland)	10.7%	20%	28%	20%	13%	10%	4%	3%	2%
Aquariums and Sealife Centres	10.5%	16%	30%	21%	12%	8%	5%	4%	3%
White Knuckle Theme Parks (e.g. Alton Towers)	9.6%	25%	28%	19%	11%	9%	2%	3%	2%
Transport Museums	8.8%	8%	30%	20%	9%	9%	8%	8%	7%
Safari Parks	7.9%	14%	30%	22%	10%	13%	4%	3%	4%
Living History (e.g. Jorvik, Jousting events)	6.5%	7%	36%	23%	10%	9%	7%	5%	3%
Average		10%	30%	20%	11%	8%	10%	7%	3%
Weighted base of Responses	13100	1267	3973	2639	1500	1066	1280	938	435

As with the general days out there is a strong link between how regularly people are visiting attractions and how much they earn.

Just because someone is not going to the same attraction several times a year however does not necessarily mean that they are not going on a lot of day trips, as they might want to visit several different types of attractions in a year, e.g. go to a Theme Park and doing something more with a bit of culture like visiting a stately home. We therefore calculated the number of **different types** of attraction which a respondent has visited at least once in the past 12 months.

Table 34 shows the number of types of attraction visited by the ArkLeisure segments. Followers and Habituals on average have visited the fewest types of attraction, 5.7 and 4.5 respectively. As shown above, these segments are also less likely to be regular visitors to any specific attraction. Cosmopolitans are not only most likely to be regular visitors to specific attractions but are also visiting the most number of different types of attractions, underlining their status as the most active group in the tourist market. High Streets are also shown to be an active visiting group.

Table 34 Number of different types of attraction visited at least once in the past 12 months by ArkLeisure segments

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
None	12.0%	9.6%	4.8%	9.2%	10.9%	18.0%	10.6%	17.4%	27.0%
1-5	29.0%	28.3%	18.3%	26.8%	29.3%	40.6%	29.1%	31.7%	38.3%
6-10	29.2%	34.0%	30.1%	27.0%	33.3%	23.9%	33.4%	28.2%	23.3%
11-15	18.1%	14.6%	25.4%	19.9%	19.6%	8.4%	23.4%	18.7%	6.4%
more than 15	11.7%	13.4%	21.5%	17.0%	6.9%	9.2%	3.5%	4.0%	5.0%
Mean	7.5	7.7	9.9	8.4	7.2	5.7	7.1	6.1	4.5
Weighted Base	5300	539	1009	959	670	680	554	482	407

On average younger people go to a wider range of attractions than older people (8.8 to 6.3 types), men also visit a wider range of attractions (7.9 to 7.1 types). Families with children under the age of 15 have visited the greatest number of different day trip attractions of all lifestage groups, (9.2 types). Those living alone are the most likely to have not been on any day trip.

Table 35 Range of types of attraction visited at least once in the past 12 months by lifestage

		Lifestage					
	All respondents	Live alone	Live with partner only	House/Flat share	Family with children under 15	Family with children over 15	Empty nesters
None	12.0%	20.2%	11.6%	11.4%	5.6%	8.6%	13.7%
1-5	29.0%	29.9%	29.0%	29.4%	23.9%	30.2%	32.8%
6-10	29.2%	28.7%	29.9%	28.5%	28.2%	30.2%	29.6%
11-15	18.1%	13.2%	20.2%	13.1%	22.6%	17.8%	18.4%
more than 15	11.7%	8.0%	9.3%	17.6%	19.7%	13.2%	5.4%
Mean	7.5	6.2	7.4	7.8	9.2	7.9	6.5
Weighted Base	5300	937	1444	496	929	687	777

The link between income and day trips is very clear when looking at the range of attractions visited. Those in the lowest income brackets are four time more likely to have been on day trips than those in the highest income groups.

Table 36 Number of different types of attraction visited at least once in the past 12 months by income

		Income							
	All respondents	Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
None	12.0%	23.3%	14.9%	11.3%	7.5%	6.4%	6.0%	4.9%	5.0%
1-5	29.0%	37.8%	33.0%	27.1%	27.8%	23.1%	21.7%	22.0%	14.3%
6-10	29.2%	21.7%	28.7%	31.1%	30.2%	32.0%	32.0%	29.5%	27.8%
11-15	18.1%	9.1%	14.5%	19.1%	21.2%	21.8%	26.1%	23.3%	35.6%
more than 15	11.7%	8.1%	8.9%	11.3%	13.3%	16.7%	14.1%	20.3%	17.3%
Mean	7.5	5.3	6.6	7.6	8.2	8.8	9.0	9.4	10.5
Weighted Base	5300	690	1399	1155	869	540	436	131	80

Respondents living in London have the greatest set of attractions options and this is reflected in the 20% of them who have visited all the different types of attraction listed in the survey. In contrast the North East, Midlands and Scotland have significant numbers who have visited very few kinds of attraction.

Table 37 Number of different types of attraction visited at least once in the past 12 months by origin

		Origin										
	All respondents	South/South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
None	12.0%	11.3%	11.0%	13.1%	14.9%	12.3%	9.6%	11.7%	15.0%	7.9%	15.8%	11.9%
1-5	29.0%	27.1%	25.1%	32.3%	23.7%	27.6%	33.8%	29.7%	33.4%	29.2%	28.3%	31.0%
6-10	29.2%	31.5%	25.5%	26.4%	35.7%	29.3%	27.5%	28.8%	31.5%	29.9%	27.6%	31.8%
11-15	18.1%	17.5%	18.8%	20.0%	15.9%	20.9%	17.2%	17.3%	12.9%	21.7%	18.4%	14.2%
more than 15	11.7%	12.6%	19.6%	8.1%	9.7%	9.8%	11.8%	12.5%	7.1%	11.3%	9.8%	11.0%
Mean	7.5	7.7	8.4	7.0	7.2	7.5	7.4	7.5	6.2	8.1	7.0	7.1
Weighted Base	5300	762	660	466	243	608	428	486	408	498	486	255

Visitor Attractions and Leisure Groups

Online Recreationalists, Home Entertainers and Readers are all less likely to take any kind of day out than the other groups as shown in Table 38. Young Socialisers and 'Inactives at Home' are the most likely to be a regular visitors to attractions especially those that are associated with; Pleasure beaches, Theme parks, Animals and to a lesser extent museums and modern art. Creative Hobbyists are most likely of all to be regular visitors to conventional art galleries, (driven by their interest in artistic pursuits?) and many historical sites, cathedrals etc.

Table 38 Day trip attractions visited regularly (3 to 4 times a year) by leisure activity groups

	All respondents	Online Recreationalist	Home entertainers	Young Socialisers	Readers	Creative Hobbyist	Inactive at home
Historic Sites & Castles	27%	18%	27%	36%	27%	33%	25%
National Trust Properties and Gardens	26%	16%	25%	31%	30%	32%	27%
Cathedrals/ Churches/ Abbeys	23%	11%	23%	26%	27%	32%	26%
History Museums	18%	11%	16%	25%	20%	24%	18%
Stately Homes & Palaces	18%	10%	18%	22%	21%	21%	21%
Art Collections and Galleries (e.g. National Gallery)	17%	7%	16%	24%	15%	**26%**	18%
Pleasure Beaches (Blackpool, Great Yarmouth)	16%	16%	13%	**24%**	11%	13%	21%
Zoos/ Zoological Gardens	14%	10%	11%	**22%**	11%	14%	19%
Botanical Gardens (e.g. Kew)	13%	7%	11%	19%	14%	15%	17%
Science Museums	12%	7%	9%	**20%**	10%	13%	17%
Modern & Contemporary Art (e.g. Tate Modern)	11%	4%	8%	**21%**	9%	16%	15%
Family Theme Parks (e.g. Thorpe Park, Legoland)	11%	9%	7%	**21%**	4%	9%	**18%**
Aquariums and Sealife Centres	10%	7%	9%	**18%**	6%	8%	**18%**
White Knuckle Theme Parks (e.g. Alton Towers)	10%	8%	6%	**21%**	4%	6%	**16%**
Transport Museums	9%	6%	6%	**14%**	6%	10%	**15%**
Safari Parks	8%	5%	6%	**13%**	4%	7%	**16%**
Living History (e.g. Jorvik, Jousting events)	7%	3%	5%	**11%**	5%	7%	**13%**
Total	100%	100%	100%	100%	100%	100%	100%
Weighted Base	5300	1167	1063	846	604	864	755

The Role of Shopping

Our final Section is about the role of shopping in day trips. The data above has shown that Approximately 30% of people think that good shopping opportunities on a trip is really their kind thing (Table 29) and over 60% of people take a shopping day out to an unusual place i.e. 'tourist shopping' at least 3 times a year (

Figure **2**).

Shopping Preferences

Shopping is an important and lucrative component of most day trips and a massive part of attraction income. Even if shopping is not the main purpose of the trip, most people will buy something or other while out. Therefore it is important to offer a shopping environment which people at the destination will enjoy.

Overall people prefer city centre shopping where they can find it, but big shopping centres whether in or out of town are very popular across the higher spending groups.

There are clear preferences in the shopping environments each ArkLeisure segment prefers. Style Hounds like city centre, big shopping centres and to a lesser extent factory outlets. Discoverers like hunting about in car boot sales Traditionals go for market towns and Functionals go for value bargains at the market. These contrasts demonstrate very clearly the different priorities of each segment and show that shopping environments can be very specifically targeted.

Table 39 Preferred type of shopping environment by ArkLeisure segments

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
A city centre	36.3%	60.5%	53.7%	28.0%	35.2%	25.7%	32.3%	23.3%	20.4%
A market town	32.9%	32.3%	49.4%	23.3%	34.2%	16.7%	40.1%	33.1%	30.8%
A big shopping centre	32.4%	65.5%	42.4%	26.0%	31.2%	28.9%	20.3%	18.6%	19.0%
A Market	29.6%	24.5%	41.7%	17.9%	33.7%	19.9%	34.1%	36.1%	29.8%
A factory outlet village	23.4%	33.7%	29.8%	19.7%	25.9%	18.7%	20.3%	18.7%	15.9%
Hunting around for unusual shops	22.1%	20.8%	37.8%	14.8%	25.2%	9.5%	26.2%	22.8%	11.5%
A car boot sale	15.2%	13.0%	22.8%	8.2%	19.0%	12.7%	16.1%	13.0%	15.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Base	5300	539	1009	959	670	680	554	482	407

Different age groups also have difference preferences though they are not as marked as the ArkLeisure profiling. Young people prefer city centre shopping and big shopping centres, whereas older respondents prefer markets and market towns. Women enjoy shopping all kinds of shopping more than men especially in factory outlet villages and hunting around in unusual shops.

Table 40 Preferred type of shopping environment by age and gender

		Age						Gender	
	All respondents	16-24	25-34	35-44	45-54	55-64	above 65	Male	Female
A city centre	36.3%	49.6%	44.9%	35.8%	33.2%	32.0%	28.9%	29.4%	42.3%
A market town	32.9%	22.9%	30.2%	28.9%	34.9%	37.3%	39.2%	26.5%	38.6%
A big shopping centre	32.4%	46.4%	42.9%	31.8%	29.1%	27.1%	24.3%	26.3%	37.8%
A Market	29.6%	19.0%	24.7%	27.3%	32.5%	33.3%	35.9%	23.4%	35.0%
A factory outlet village	23.4%	18.2%	28.8%	23.1%	21.3%	21.4%	25.1%	16.8%	29.2%
Hunting around for unusual shops	22.1%	19.9%	20.4%	22.2%	23.5%	22.7%	22.9%	15.9%	27.5%
A car boot sale	15.2%	10.9%	16.7%	16.0%	16.1%	14.8%	15.2%	12.0%	18.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Weighted Base	5300	562	862	1056	884	805	1131	2483	2817

There are also differences when looking at the type of day trips people prefer. Those who prefer Botanical Gardens Historic Sites and Castles are not as keen on big shopping centres as the average. Those interested in art collections and modern contemporary art also like hunting around for unusual shops, as do those that attend arts festivals. For those who prefer to have good shopping opportunities on their day trip show more interest in factory outlet villages, big shopping centres and city centres than the average.

Table 41 Preferred type of shopping environment by Preferred type of day trips

	A factory outlet village	A big shopping centre	A city centre	A market town	A Market	A car boot sale	Hunting around for unusual shops	Total	Weighted Base
Botanical Gardens (eg. Kew)	32%	34%	44%	52%	46%	21%	40%	100%	769
Cathedrals/ Churches/ Abbeys	31%	36%	44%	53%	45%	22%	38%	100%	835
Gardens	32%	36%	42%	54%	45%	22%	39%	100%	965
Stately Homes & Palaces	34%	38%	47%	55%	46%	22%	38%	100%	891
Historic Sites & Castles	29%	34%	43%	50%	44%	21%	37%	100%	1263
History Museums	30%	37%	46%	51%	45%	22%	41%	100%	807
Science Museums	27%	38%	45%	47%	43%	21%	38%	100%	711
Transport Museums	28%	34%	40%	48%	44%	23%	36%	100%	423
Art Collections and Galleries (eg. National Gallery)	30%	37%	48%	50%	42%	20%	44%	100%	621
Modern & Contemporary Art (eg. Tate Modern)	27%	38%	53%	50%	43%	20%	47%	100%	433
Zoos/ Zoological Gardens	35%	46%	49%	44%	40%	23%	33%	100%	914
Safari Parks	37%	51%	52%	44%	41%	24%	33%	100%	644
Aquariums and Sealife Centres	36%	47%	52%	48%	43%	25%	34%	100%	770
White Knuckle Theme Parks (eg. Alton Towers)	31%	60%	59%	35%	33%	20%	27%	100%	642
Family Theme Parks (eg. Thorpe Park, Legoland)	31%	61%	60%	37%	35%	22%	26%	100%	614
Pleasure Beaches (eg. Blackpool, Great	33%	58%	59%	45%	45%	26%	29%	100%	686
Good shopping opportunities	39%	61%	64%	49%	43%	25%	35%	100%	1604
A trip to the beach/ seaside	31%	44%	49%	45%	40%	23%	31%	100%	1867
An activity (e.g. cycling, water sports, etc.)	29%	47%	50%	37%	33%	18%	28%	100%	697
Just a bit of general exploration	30%	37%	46%	47%	42%	21%	36%	100%	1920
Attending an arts festival	30%	35%	53%	54%	48%	25%	50%	100%	461
A night out (drinks/ clubbing/ socialising)	28%	50%	56%	39%	35%	19%	27%	100%	1190
Watching a sporting event	27%	43%	46%	35%	30%	15%	21%	100%	958
Going for a walk somewhere new	29%	37%	44%	44%	39%	19%	32%	100%	1952
Average	31%	43%	50%	46%	41%	22%	35%	100%	5300

Role of Shopping on Specific Trips

Using our individual trip data we can show that 55% of trips included some kind of shopping element, even though for 60% of these trips (32% overall) it was only a minor part of the trip. The trip types on which people are least likely to go shopping are those undertaking a leisure activity or hobby, participating in or watching a sports event or attending an entertainment.

Table 42 importance of shopping while on day trip

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertainment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa	Total
We didn't do any shopping	49%	4%	45%	58%	59%	42%	69%	51%	58%	67%	57%	36%	45%
It was a minor part of the trip	43%	23%	41%	30%	22%	37%	24%	35%	23%	21%	28%	33%	32%
It was an important part of the trip	6%	22%	9%	8%	11%	12%	5%	10%	10%	9%	8%	21%	11%
It was the main reason we went	2%	50%	5%	4%	8%	10%	2%	4%	8%	3%	7%	10%	12%
Weighted Base	900	1,227	1,272	643	200	1,311	378	577	695	723	364	135	8,425

Those respondents who said that they had done some shopping on their trip were asked what kind of shops they had been to. The high street chains and department stores take the majority of business, though specialist food shops also do well.

Those who had been to the beach or who visited a tourist attraction mainly shopped at a souvenir or gift shop, however, over 50% also had shopped in a high street store while on their trip.

Shopping days out are focussed on the main high street, fashion and department stores. Spas are naturally connected to fashion and hairdressing/beauty shops etc.

Table 43 Types of shopping associated with each trip type

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertainment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa etc	Total
High Street/chain store(s)	53%	81%	57%	55%	69%	62%	58%	54%	71%	72%	57%	75%	65%
Department Store(s)	35%	71%	45%	41%	55%	45%	52%	42%	64%	62%	37%	62%	53%
Fashion Boutique(s)	20%	35%	26%	19%	38%	25%	16%	21%	27%	30%	22%	38%	27%
Hairdresser/ beauty parlour etc	3%	3%	4%	3%	14%	4%	5%	7%	9%	6%	6%	38%	5%
Individual independent shop(s) (e.g. lighting, jewellery, gifts etc)	44%	38%	39%	38%	36%	40%	19%	34%	35%	35%	32%	39%	38%
A delicatessen or specialist food shop	41%	34%	46%	41%	49%	42%	36%	39%	40%	38%	37%	39%	40%
An book antiques or bric a brac market or similar type of place	36%	23%	32%	33%	33%	33%	18%	32%	24%	19%	29%	26%	29%
A gift shop at an attraction	49%	19%	56%	33%	33%	33%	40%	37%	26%	26%	28%	37%	34%
A souvenir shop	54%	13%	44%	27%	33%	29%	30%	27%	19%	19%	23%	31%	28%
Weighted Base	463	1,174	698	271	82	762	118	286	290	240	158	87	4,628

We also asked what items people spend their money on. Most people spend money on meals or soft drinks. Alcoholic drinks are most correlated with nights out and sporting events, but 35% of all trips include spending on alcohol.

The majority of trips to attend events and visit tourist attractions included spending money on admission tickets. 64% of all shopping trips include clothes purchases and almost 40% of trips to visitor attractions include gifts and souvenirs.

Table 44 what did they spend on by trip type and shop type

	A trip to the beach/ seaside	To go on a special shopping trip	Visit any kind of tourist/ visitor attraction	Undertake a leisure activity	Participate in a sports event/ competition	Go on a general day out/ to explore an area	Watch a sport event	Attend a special event	Attend an entertainment	Go for a night out	Participate in a hobby (out of home)	Go for a day out to a beauty/health centre/ spa etc	All Trips
Meals/snacks/non-alcoholic drinks	82%	76%	84%	66%	56%	78%	72%	78%	69%	75%	64%	64%	75%
Alcoholic drinks	36%	22%	33%	27%	35%	30%	45%	39%	42%	71%	29%	28%	35%
Admission tickets, (including tickets bought in advance or tickets combining travel and entrance charges)	22%	12%	55%	21%	35%	21%	66%	55%	68%	18%	28%	36%	34%
Clothes	20%	64%	21%	17%	19%	25%	16%	18%	19%	16%	19%	37%	27%
Gifts & Souvenirs	35%	21%	39%	17%	12%	23%	21%	25%	12%	10%	14%	20%	23%
Large household purchases like furniture or antiques etc	0%	4%	1%	0%	1%	1%	0%	1%	1%	2%	0%	3%	1%
Weighted Base	900	1,227	1,272	643	200	1,311	378	577	695	723	364	135	8,425

Brand Preferences

Looking at what shop brands are preferred by people preferring certain kind of day trips can help in deciding whether a certain shop brand should be allowed to open in a certain destination.

Table 45 Brand preferences for different kinds of trips

	Done at least 3 or 4 times a year																	
	Botanical Gardens (e.g. Kew)	Cathedrals / Churches/ Abbeys	National Trust Properties and Gardens	Stately Homes & Palaces	Historic Sites & Castles	Living History (e.g. Jorvik, Jousting events)	History Museums	Science Museums	Transport Museums	Art Collections and Galleries (e.g. National Gallery)	Modern & Contemporary Art (e.g. Tate Modern)	Zoos/ Zoological Gardens	Safari Parks	Aquariums and Sealife Centres	White Knuckle Theme Parks (e.g. Alton Towers)	Family Theme Parks (e.g. Thorpe Park, Legoland)	Pleasure Beaches (Blackpool, Great Yarmouth)	Average
Argos	31%	33%	35%	36%	37%	37%	35%	35%	39%	28%	28%	40%	43%	42%	44%	46%	46%	37%
Marks & Spencer	40%	42%	43%	44%	41%	34%	40%	37%	36%	42%	39%	33%	29%	32%	30%	31%	33%	37%
WHSmith	34%	36%	35%	37%	36%	34%	35%	33%	34%	37%	33%	33%	31%	31%	31%	31%	32%	34%
Waterstones	40%	39%	40%	39%	39%	38%	40%	39%	30%	45%	43%	33%	28%	30%	28%	29%	26%	36%
A farmers market	35%	36%	36%	37%	36%	33%	36%	32%	29%	36%	35%	29%	25%	29%	20%	22%	24%	31%
Primark	20%	22%	21%	22%	23%	25%	24%	22%	22%	21%	23%	27%	31%	27%	31%	33%	30%	25%
Woolworths	23%	23%	23%	24%	26%	29%	25%	25%	26%	21%	21%	31%	33%	32%	32%	35%	33%	27%
Ikea	24%	23%	25%	26%	26%	25%	26%	24%	25%	26%	28%	27%	28%	28%	30%	29%	27%	26%
Debenhams	24%	27%	26%	28%	26%	28%	26%	26%	21%	28%	28%	27%	27%	28%	30%	28%	26%	27%
George	19%	19%	20%	21%	22%	25%	21%	22%	24%	18%	17%	26%	28%	26%	25%	25%	28%	23%
Next	21%	21%	22%	23%	23%	27%	22%	24%	21%	21%	23%	31%	32%	33%	34%	33%	30%	26%
Matalan	17%	19%	18%	21%	21%	22%	20%	18%	21%	16%	15%	23%	26%	24%	23%	25%	28%	21%
John Lewis	30%	28%	30%	31%	27%	25%	29%	26%	23%	34%	32%	25%	25%	23%	21%	23%	23%	27%
An independent, one-off clothes shop	22%	22%	22%	21%	22%	23%	23%	20%	17%	26%	28%	22%	20%	21%	21%	18%	20%	22%
TK Maxx	18%	16%	17%	17%	17%	24%	18%	19%	16%	19%	21%	20%	21%	21%	23%	22%	21%	19%
BHS	17%	18%	16%	19%	18%	22%	17%	17%	16%	17%	16%	17%	19%	18%	18%	20%	19%	18%
New Look	12%	12%	12%	14%	14%	18%	13%	16%	14%	12%	15%	20%	23%	22%	23%	25%	21%	17%
House of Fraser	19%	18%	17%	19%	17%	17%	17%	17%	12%	21%	20%	17%	18%	18%	17%	18%	17%	18%
H&M	14%	13%	13%	13%	14%	21%	15%	17%	13%	16%	20%	18%	21%	19%	24%	24%	19%	17%
Dorothy Perkins	13%	13%	13%	14%	14%	20%	15%	16%	14%	14%	17%	19%	20%	19%	20%	20%	19%	16%
River Island	11%	10%	10%	12%	12%	19%	13%	15%	13%	12%	15%	19%	23%	20%	28%	24%	19%	16%
Top Shop	13%	12%	11%	12%	13%	21%	13%	15%	14%	14%	18%	19%	23%	19%	26%	23%	18%	17%
Game	13%	9%	10%	10%	12%	19%	12%	15%	16%	10%	12%	17%	19%	20%	27%	25%	17%	16%
Selfridges	16%	14%	14%	17%	15%	20%	15%	17%	15%	18%	21%	17%	20%	18%	20%	19%	16%	17%
An antiques shop	18%	17%	17%	19%	17%	22%	19%	16%	18%	21%	21%	14%	13%	15%	14%	12%	14%	17%
Monsoon	15%	12%	13%	14%	12%	16%	14%	15%	13%	15%	18%	15%	16%	16%	15%	15%	13%	14%
An independent design shop	15%	13%	12%	13%	12%	16%	14%	14%	14%	17%	22%	16%	15%	15%	15%	14%	12%	15%
Burton	10%	8%	9%	9%	9%	14%	10%	12%	12%	9%	11%	12%	15%	14%	20%	17%	14%	12%
Lush	13%	10%	11%	12%	11%	17%	11%	13%	12%	13%	17%	12%	15%	13%	12%	12%	11%	13%
Principles	13%	11%	11%	12%	10%	15%	10%	11%	12%	12%	13%	10%	13%	13%	12%	13%	12%	12%
French Connection	10%	8%	8%	9%	9%	14%	9%	11%	11%	11%	14%	13%	17%	16%	20%	18%	14%	13%
Wallis	10%	9%	9%	10%	9%	11%	8%	11%	9%	10%	11%	9%	12%	10%	9%	11%	9%	10%
Hugo Boss	10%	8%	7%	9%	9%	15%	9%	12%	14%	9%	11%	13%	18%	15%	20%	17%	14%	12%
Diesel	11%	8%	7%	8%	9%	15%	9%	12%	12%	10%	12%	13%	19%	15%	21%	19%	14%	13%
Harvey Nichols	13%	10%	9%	11%	10%	15%	11%	12%	11%	13%	15%	12%	14%	13%	13%	13%	12%	12%
Ted Baker	10%	7%	6%	7%	8%	14%	9%	12%	10%	8%	12%	11%	15%	13%	19%	17%	12%	11%
Levi's Store	11%	7%	7%	8%	8%	15%	10%	12%	13%	10%	12%	13%	17%	14%	17%	15%	11%	12%
Emporio Armani	9%	7%	6%	8%	7%	14%	9%	10%	12%	9%	12%	11%	14%	13%	17%	14%	11%	11%
Millets	10%	9%	9%	10%	9%	13%	9%	11%	13%	11%	11%	10%	12%	11%	9%	9%	8%	10%
Lacoste	11%	7%	6%	8%	7%	13%	9%	11%	12%	9%	11%	11%	16%	13%	17%	14%	12%	11%
Dolcis	9%	7%	7%	7%	7%	11%	8%	9%	9%	9%	9%	8%	12%	9%	10%	11%	9%	9%
Russell & Bromley	10%	7%	7%	9%	7%	11%	7%	9%	9%	10%	10%	8%	9%	8%	7%	7%	6%	8%
Republic	8%	6%	5%	6%	6%	13%	7%	10%	10%	7%	10%	9%	13%	12%	15%	13%	8%	9%
Blacks	9%	8%	8%	8%	7%	12%	9%	9%	9%	9%	10%	7%	10%	8%	10%	8%	6%	9%
Fat Face	8%	5%	6%	6%	6%	11%	6%	8%	7%	8%	10%	8%	10%	9%	9%	8%	6%	8%
White stuff	6%	4%	4%	5%	4%	8%	5%	6%	6%	5%	7%	6%	8%	7%	7%	6%	5%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Weighted Base	682	1,226	1,365	952	1,414	346	955	623	469	887	585	718	416	554	511	568	828	5,300

The following tables provide an insight into the brand preferences of different groups of people.

Table 46 Preferred brands by ArkLeisure Segment

		Arkleisure Segmentation							
	All respondents	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Argos	39%	45%	44%	29%	45%	37%	37%	34%	43%
Marks & Spencer	34%	31%	49%	33%	29%	21%	44%	27%	23%
WHSmith	31%	37%	44%	26%	28%	18%	36%	36%	22%
Waterstones	28%	26%	43%	23%	27%	13%	39%	28%	21%
A farmers market	26%	18%	39%	18%	31%	8%	36%	30%	21%
Primark	25%	30%	28%	18%	28%	27%	24%	18%	24%
Woolworths	24%	33%	30%	17%	28%	21%	23%	20%	23%
Ikea	23%	31%	32%	18%	25%	16%	21%	19%	12%
Debenhams	22%	33%	37%	21%	18%	14%	20%	13%	13%
George	22%	26%	25%	17%	24%	24%	20%	18%	24%
Next	22%	40%	35%	20%	19%	16%	15%	9%	11%
Matalan	22%	23%	24%	15%	25%	23%	24%	19%	27%
John Lewis	21%	27%	36%	17%	17%	9%	26%	18%	13%
An independent, one-off clothes shop	17%	26%	30%	11%	16%	6%	15%	11%	11%
TK Maxx	16%	24%	24%	12%	16%	12%	17%	11%	9%
BHS	16%	15%	23%	12%	16%	12%	19%	11%	14%
New Look	14%	27%	21%	10%	12%	16%	9%	7%	9%
House of Fraser	13%	22%	27%	11%	9%	4%	12%	7%	5%
H&M	13%	26%	22%	8%	11%	8%	8%	8%	5%
Dorothy Perkins	12%	22%	19%	10%	10%	10%	8%	5%	8%
River Island	11%	31%	20%	8%	8%	7%	4%	3%	3%
Top Shop	11%	28%	18%	9%	9%	7%	6%	3%	4%
Game	11%	23%	17%	7%	15%	8%	5%	4%	5%
Selfridges	11%	22%	23%	7%	7%	4%	8%	4%	5%
An antiques shop	11%	6%	23%	7%	9%	3%	13%	11%	8%
Monsoon	9%	14%	17%	7%	7%	5%	7%	4%	4%
An independent design shop	8%	15%	20%	5%	6%	1%	6%	4%	3%
Burton	8%	18%	14%	6%	6%	4%	4%	2%	4%
Lush	8%	10%	13%	5%	8%	4%	8%	5%	5%
Principles	8%	11%	16%	6%	6%	4%	6%	3%	4%
French Connection	7%	21%	14%	4%	4%	3%	3%	1%	1%
Wallis	7%	9%	14%	6%	5%	4%	6%	3%	3%
Hugo Boss	7%	22%	14%	4%	4%	3%	2%	1%	1%
Diesel	7%	23%	13%	4%	5%	3%	1%	1%	1%
Harvey Nichols	7%	14%	15%	4%	3%	1%	4%	3%	3%
Ted Baker	6%	19%	13%	3%	3%	3%	2%	2%	2%
Levi's Store	6%	14%	13%	3%	5%	2%	2%	3%	1%
Emporio Armani	6%	18%	13%	4%	3%	2%	1%	2%	1%
Millets	6%	5%	11%	3%	7%	2%	6%	6%	5%
Lacoste	6%	16%	11%	3%	3%	3%	2%	2%	1%
Dolcis	6%	10%	12%	4%	2%	3%	4%	3%	2%
Russell & Bromley	5%	5%	11%	4%	3%	1%	4%	3%	3%
Republic	4%	15%	8%	3%	2%	2%	1%	2%	1%
Blacks	4%	4%	9%	3%	5%	2%	3%	3%	2%
Fat Face	3%	4%	8%	3%	2%	1%	2%	2%	1%
White stuff	2%	3%	6%	1%	2%	0%	1%	1%	2%
Weighted Base	5300	539	1009	959	670	680	554	482	407

Table 47 Preferred brands by Income

	All respondents	Income: Under £10,000	£10-19999	£20-29999	£30-39999	£40-49999	£50,000-74,999	£75,000-99,999	over £100,000
Argos	39%	43%	46%	41%	35%	33%	28%	25%	20%
Marks & Spencer	34%	24%	35%	34%	31%	40%	36%	41%	44%
WHSmith	31%	28%	34%	33%	29%	30%	31%	29%	31%
Waterstones	28%	20%	27%	31%	29%	31%	29%	**45%**	34%
A farmers market	26%	22%	27%	27%	25%	23%	27%	25%	25%
Primark	25%	30%	30%	24%	20%	24%	15%	17%	15%
Woolworths	24%	28%	29%	24%	20%	23%	17%	11%	19%
Ikea	23%	17%	21%	24%	23%	26%	27%	23%	22%
Debenhams	22%	16%	22%	24%	20%	26%	27%	29%	25%
George	22%	25%	27%	22%	19%	21%	15%	12%	9%
Next	22%	15%	21%	22%	23%	26%	26%	28%	21%
Matalan	22%	24%	27%	23%	18%	18%	15%	14%	10%
John Lewis	21%	13%	18%	19%	22%	27%	31%	**41%**	**35%**
An independent, one-off clothes shop	17%	13%	16%	18%	14%	20%	19%	19%	22%
TK Maxx	16%	14%	17%	17%	15%	18%	16%	19%	16%
BHS	16%	16%	21%	15%	13%	12%	10%	10%	10%
New Look	14%	16%	15%	14%	13%	15%	12%	13%	11%
House of Fraser	13%	9%	12%	13%	12%	19%	18%	**24%**	18%
H&M	13%	13%	11%	14%	12%	17%	11%	14%	16%
Dorothy Perkins	12%	12%	13%	14%	11%	13%	12%	12%	8%
River Island	11%	9%	11%	11%	11%	15%	12%	12%	17%
Top Shop	11%	9%	11%	10%	10%	16%	11%	**17%**	12%
Game	11%	9%	9%	12%	13%	12%	11%	12%	15%
Selfridges	11%	8%	9%	9%	10%	15%	14%	**26%**	**26%**
An antiques shop	11%	9%	12%	13%	9%	9%	10%	8%	13%
Monsoon	9%	6%	9%	9%	8%	9%	11%	**15%**	**14%**
An independent design shop	8%	6%	7%	8%	8%	10%	10%	**17%**	**18%**
Burton	8%	5%	7%	8%	8%	11%	9%	8%	10%
Lush	8%	5%	7%	9%	7%	9%	8%	**12%**	**12%**
Principles	8%	5%	7%	7%	7%	9%	**11%**	**11%**	5%
French Connection	7%	5%	6%	7%	7%	10%	6%	**13%**	**12%**
Wallis	7%	5%	7%	7%	6%	9%	10%	10%	8%
Hugo Boss	7%	5%	6%	7%	7%	9%	7%	**12%**	**12%**
Diesel	7%	4%	6%	7%	6%	10%	8%	**13%**	6%
Harvey Nichols	7%	4%	5%	6%	6%	10%	9%	**16%**	**12%**
Ted Baker	6%	4%	5%	6%	6%	**10%**	7%	**12%**	7%
Levi's Store	6%	5%	6%	6%	7%	8%	5%	6%	**12%**
Emporio Armani	6%	4%	4%	6%	6%	**10%**	7%	**14%**	**10%**
Millets	6%	5%	6%	6%	6%	6%	7%	6%	5%
Lacoste	6%	4%	5%	5%	5%	7%	6%	**9%**	**9%**
Dolcis	6%	5%	6%	5%	5%	6%	5%	7%	2%
Russell & Bromley	5%	3%	4%	5%	4%	5%	**7%**	**12%**	**13%**
Republic	4%	3%	3%	5%	5%	5%	6%	6%	**12%**
Blacks	4%	2%	3%	4%	4%	5%	6%	**11%**	**7%**
Fat Face	3%	2%	3%	3%	4%	4%	4%	**7%**	**8%**
White stuff	2%	2%	2%	2%	1%	3%	3%	**7%**	**6%**
Weighted Base	5300	690	1399	1155	869	540	436	131	80

Table 48 Preferred brands by Region

		Origin										
	All respondents	South/South East	London	South West	North East	North West	Yorkshire	West Midlands	East Midlands	East	Scotland	Wales
Argos	39%	38%	34%	38%	39%	41%	39%	43%	47%	39%	36%	39%
Marks & Spencer	34%	35%	37%	35%	38%	35%	32%	29%	29%	33%	32%	34%
WHSmith	31%	31%	31%	36%	35%	30%	31%	30%	28%	33%	31%	28%
Waterstones	28%	27%	28%	32%	29%	32%	26%	29%	27%	28%	28%	23%
A farmers market	26%	27%	18%	32%	28%	28%	27%	25%	23%	27%	21%	27%
Primark	25%	24%	26%	21%	33%	28%	27%	24%	22%	21%	22%	21%
Woolworths	24%	26%	24%	27%	20%	24%	21%	24%	25%	27%	22%	26%
Ikea	23%	19%	27%	16%	24%	25%	23%	21%	20%	20%	28%	25%
Debenhams	22%	24%	22%	22%	24%	24%	20%	26%	17%	22%	21%	24%
George	22%	18%	17%	17%	26%	28%	26%	22%	25%	23%	23%	23%
Next	22%	22%	24%	22%	22%	22%	19%	25%	18%	24%	19%	27%
Matalan	22%	23%	17%	18%	28%	27%	24%	25%	23%	19%	20%	21%
John Lewis	21%	24%	27%	22%	24%	21%	14%	15%	23%	22%	20%	15%
An independent, one-off clothes shop	17%	14%	18%	18%	10%	18%	17%	16%	17%	18%	14%	20%
TK Maxx	16%	14%	19%	15%	19%	16%	14%	18%	13%	13%	19%	21%
BHS	16%	19%	15%	16%	16%	17%	15%	16%	14%	15%	13%	15%
New Look	14%	15%	14%	11%	12%	16%	12%	15%	13%	15%	15%	19%
House of Fraser	13%	12%	15%	13%	16%	15%	14%	12%	9%	11%	14%	17%
H&M	13%	13%	16%	12%	9%	12%	12%	14%	13%	12%	11%	12%
Dorothy Perkins	12%	11%	12%	12%	12%	13%	11%	13%	10%	13%	15%	13%
River Island	11%	9%	14%	9%	10%	14%	11%	13%	9%	10%	13%	13%
Top Shop	11%	9%	15%	9%	6%	13%	11%	15%	8%	10%	10%	12%
Game	11%	11%	12%	8%	6%	11%	14%	13%	10%	11%	13%	9%
Selfridges	11%	11%	**18%**	9%	7%	14%	7%	13%	9%	8%	7%	10%
An antiques shop	11%	9%	11%	13%	13%	11%	11%	9%	11%	11%	10%	11%
Monsoon	9%	9%	10%	9%	8%	9%	8%	7%	5%	11%	10%	11%
An independent design shop	8%	8%	11%	7%	7%	9%	9%	9%	7%	6%	7%	12%
Burton	8%	6%	10%	6%	6%	8%	7%	9%	9%	6%	9%	10%
Lush	8%	6%	8%	9%	6%	9%	8%	9%	8%	6%	8%	8%
Principles	8%	9%	7%	6%	7%	11%	8%	8%	5%	6%	7%	9%
French Connection	7%	6%	**11%**	7%	8%	8%	7%	7%	4%	6%	7%	5%
Wallis	7%	7%	8%	6%	10%	10%	4%	6%	6%	6%	7%	9%
Hugo Boss	7%	6%	10%	5%	7%	6%	6%	7%	7%	7%	7%	6%
Diesel	7%	5%	**11%**	4%	3%	5%	7%	8%	8%	6%	9%	7%
Harvey Nichols	7%	6%	**11%**	6%	5%	9%	6%	4%	5%	5%	5%	6%
Ted Baker	6%	5%	**10%**	4%	4%	7%	6%	7%	7%	4%	6%	7%
Levi's Store	6%	6%	**11%**	4%	4%	5%	3%	7%	5%	4%	8%	3%
Emporio Armani	6%	4%	**12%**	4%	5%	5%	6%	7%	5%	5%	5%	5%
Millets	6%	6%	8%	6%	4%	6%	4%	7%	6%	5%	5%	7%
Lacoste	6%	3%	**10%**	3%	7%	6%	3%	7%	4%	4%	6%	7%
Dolcis	6%	5%	7%	4%	5%	7%	4%	6%	4%	5%	6%	7%
Russell & Bromley	5%	6%	**8%**	5%	3%	4%	4%	3%	3%	3%	3%	4%
Republic	4%	3%	6%	3%	5%	5%	5%	**8%**	4%	3%	4%	4%
Blacks	4%	5%	6%	5%	3%	4%	3%	4%	4%	2%	3%	5%
Fat Face	3%	4%	5%	3%	4%	3%	3%	4%	3%	3%	2%	3%
White stuff	2%	**3%**	3%	1%	1%	2%	1%	3%	2%	1%	1%	3%
Weighted Base	5300	762	660	466	243	608	428	486	408	498	486	255

Appendix 1 Survey Profile

The survey was carried out using an online methodology. 5300 respondents were asked across the whole of Britain. The fieldwork was carried out over 3 waves from August 2007 to February 2008. Quotas were applied by region, age and gender to ensure that a representative cross section of the population was interviewed.

Table 49 Unweighted sample profile of respondents

		Number of respondents
Age	16-24	864
	25-34	761
	35-44	945
	45-54	917
	55-64	710
	above 65	1104
Gender	Male	2507
	Female	2794
Origin	South/South East	785
	London	811
	South West	385
	North East	189
	North West	648
	Yorkshire	411
	West Midlands	649
	East Midlands	349
	East	313
	Scotland	510
	Wales	251
	All respondents	5301

The data was then weighted to ensure that the dataset fully represented the national population by key demographics.

Those respondents who said that they had taken part in specific day trips out of their usual environment in the past 3 months were then asked to provide additional information such as information sources, who they had travelled with etc, for a maximum of 2 of their trips. The selection process was designed in a way that while more popular types of day trip would get more responses, others would still be ensured to get a minimum number of reviews for each trip type.

The table below shows the number of responses collected for each of the 12 different trip types asked about. This trip information was also weighted to reflect the profile of people who had taken part in these trips as established in the main part of the survey.

Table 50 Follow up responses by trip type

	Number of responses
A trip to the beach/ seaside	900
Go on a special shopping trip (not for everyday items)	1227
Visit any kind of tourist/ visitor attraction	1272
Undertake a leisure activity	643
Participate in a sports event/ competition	200
Go on a general day out/ to explore an area	1311
Watch a sport event	378
Attend a special event	559
Attend an entertainment	695
Go for a night out	723
Participate in a hobby (out of home)	364
Go for a day out to a beauty/health centre/ spa etc	135
Total	8407