Day Visitor Research For South East England

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Purpose of survey

National Questions

- Why fewer people are choosing to take day trips?
- If are taking a day trip, why going less often?
- What would encourage them to reverse this trend to the benefit of the local economy?

TSE Questions

- Profile all tourism day trips to the region using a full sample of all trips (not selected destinations)
- Capture:
  - Type of trip
  - Type of person (incl. ArkLeisure)
  - What they are doing and spending
- Gain an understanding of the awareness, and interest by segment of 150 of the regions destinations

Competitive environment

- Less free time
- Stay at home options most popular: watching TV, surfing online and reading books (all at home)
- Less association with income amongst activities
- Need to understand peoples current behaviour and attitudes so we can target the message, provide right incentives and remove significant barriers
- Research shows the different activities such as reading, watching tv, hobbies etc.

Source: VB National Day Visitor Research

Background

- Less people take days out – most frequent activity is walks (24% do this every week)

- The variety of activities is quite diverse i.e. 50% of population visit tourist attractions, attend entertainment (theatre/cinema), go for general days out, special shopping, pursuing hobbies and other leisure activities at least 3 or 4 times a year

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

Source: VB National Day Visitor Research

Defining a Tourism Trip

- Going on a special shopping trip accounts for 15% of all tourism trips, followed by undertaking a leisure activity (13%), going on a general day out to explore (13%) to a visitor attraction (12%)

Source: VB National Day Visitor Research

Profile of Day Trippers

- Segment differences:
  - **Cosmopolitans** among the most active of the groups with interest in every kind of day out and generally up for all kinds of events and new experiences. Twice as likely as most other groups to attend a special event
  - **Style Hounds** also an active group with interest in sports, parties and hobbies
- Activity declines with age and lower income
- People living with others as a family or house share more active than those living alone or with their partner
- Over two thirds of Londoners (61%) go for a night out at least once a month. Also more likely to go to entertainment, shopping, special event, day out or beauty and health spa

Source: VB National Day Visitor Research

Attitudes towards Day Out

- Barriers:
  - 25% of respondents claimed **expense**
  - 9% claim **lack of knowledge** of the options is a barrier – although could be higher as low awareness for many attractions
  - High degree of correlation between recognition of barriers (rather than low recognition of benefits) and lack of activity
  - Only 50% of population recognise that going for a day trip can refresh and create good memories

Source: VB National Day Visitor Research

Trip Profile (1)

- Where do they go?
  - Majority take a trip in the same region that they live
  - 45% of those living in the South East take a day trip to the South East (29% East of England, 22% London)
  - London is the favoured destination for attending special events, special entertainment although less strong for shopping

- Who they go with – and why
  - Friends do more planned and purposeful things e.g. sports, nights out and hobbies/spa trips
  - Families more likely to go to the beach, tourist attraction or sports event

Source: VB National Day Visitor Research

Trip Profile (2)

Reasons that prompted trip

• **Desire** to do something different/ a change of scene influences 23% of trips

• **Good weather** is a key influence on beach trips, leisure activities, hobbies and general exploration

• "**Just to get out of the house**" influences trips to the beach, exploring and going to a health spa

Factors that will make a good day out

• 'A pleasant place to be' and 'good local food and drink' (50% of the population)

• 'Lots of things to do, a new experience, something out of the ordinary' (30-40%)

• 'Good shopping, live performances and a bit of culture' (20-30%)

• Differences by segment:

  - Style Hounds/Cosmopolitans: cool stylish place, thrilling experience
  - Discoverers: new experience and something out of the ordinary

• Londoners want much more from their day out than other regions

Source: VB National Day Visitor Research

Trip Profile (3)

- Preparing for a Trip
  - For over half of trips **no information** was used in preparing for a trip – where familiar with location or where no obvious source of information available (61%)
  - **Recommendations from friends and family** are the most important source of information (23%)
  - **Websites** for specific attractions (11%) and the website of a tourist office (8%) are most used 'official' sources
  - Findings suggest a web profile is a necessity for modern destinations – particularly the case for special events (25% of visitors seek information through a specific website)
  - Special events and entertainment benefit most from **advertising**, it having only a modest role in providing information
  - Around two thirds (62%) planned their trip at least one week in advance with 35% going on the spur of the moment

Source: VB National Day Visitor Research

Attractions

- Traditional heritage sites most popular – appeal across all segments
- Cosmopolitans most active attraction visitors both in variety visited and repeat visits
- Families with children (under 15) are most frequent visitors
- Younger people visit a wider range of attractions than older people

Source: VB National Day Visitor Research

The Role of Shopping

- Over half of specific trips include a shopping element
- 30% of people would prefer to go shopping on a day trip
- Around two thirds (60%) have been 'tourist shopping' at least 3 times a year
- Differences amongst segments:
  - Style Hounds like big city centre shopping centres
  - Discoverers: car boot sales
  - Traditionals: market towns
  - Functionals: value bargains at markets
- Spend:
  - 64% of all shopping trips include food purchases
  - Over a third (35%) of all trips include spending on alcohol
  - 40% of trips to visitor attractions include purchasing gifts and souvenirs

Source: VB National Day Visitor Research

The Survey Design: TSE Research

4 waves of research between July 2007 and February 2008

- 5300 respondents – residents within a reasonable travel distance of the region.
- all asked about tourism trips recently taken in SE
  - Purposes of their trips,
  - The destinations they have visited and
  - Awareness, perceptions and visit history of 150 of regional destinations
- follow up research amongst recent tourism day trippers to the SE
  - 2000+ day trippers and 3000+ trips
  - covering:
    - information sources,
    - reasons for trip,
    - activities
    - general spend on day

Sample Area

- The sample area was based on the area that could sensibly access the South East for a day trip.
- This area was then split into zones and a representative sample collected from each zone
- Sample was weighted to make it representative of the entire population in the sample area

Perceptions of individual attractions

- Respondents to the survey were asked about their awareness and perceptions of a number of individual destinations and visitor attractions
- Destinations were grouped into different categories and each respondent was asked about their awareness and perception of destinations from 2 categories as a place for a day out
- The following charts show the top 10 attractions people said they have visited for a day out from the three categories
  - "Culture and Heritage destinations" category
  - "Houses and Gardens"
  - "Family Attractions"

Day Visitors participating once a fortnight by Arkleisure Segments

- For all segments visiting family and friends is the most popular trip type which is done every fortnight
- Cosmopolitans are more likely than the other segments to visit a tourist/visitor attraction and go shopping once a fortnight
- Functionals are least likely of all segments to have been on a shopping trip
- Habituals are least likely to have been to visit a tourist/visitor attraction

Source: VB National Day Visitor Research

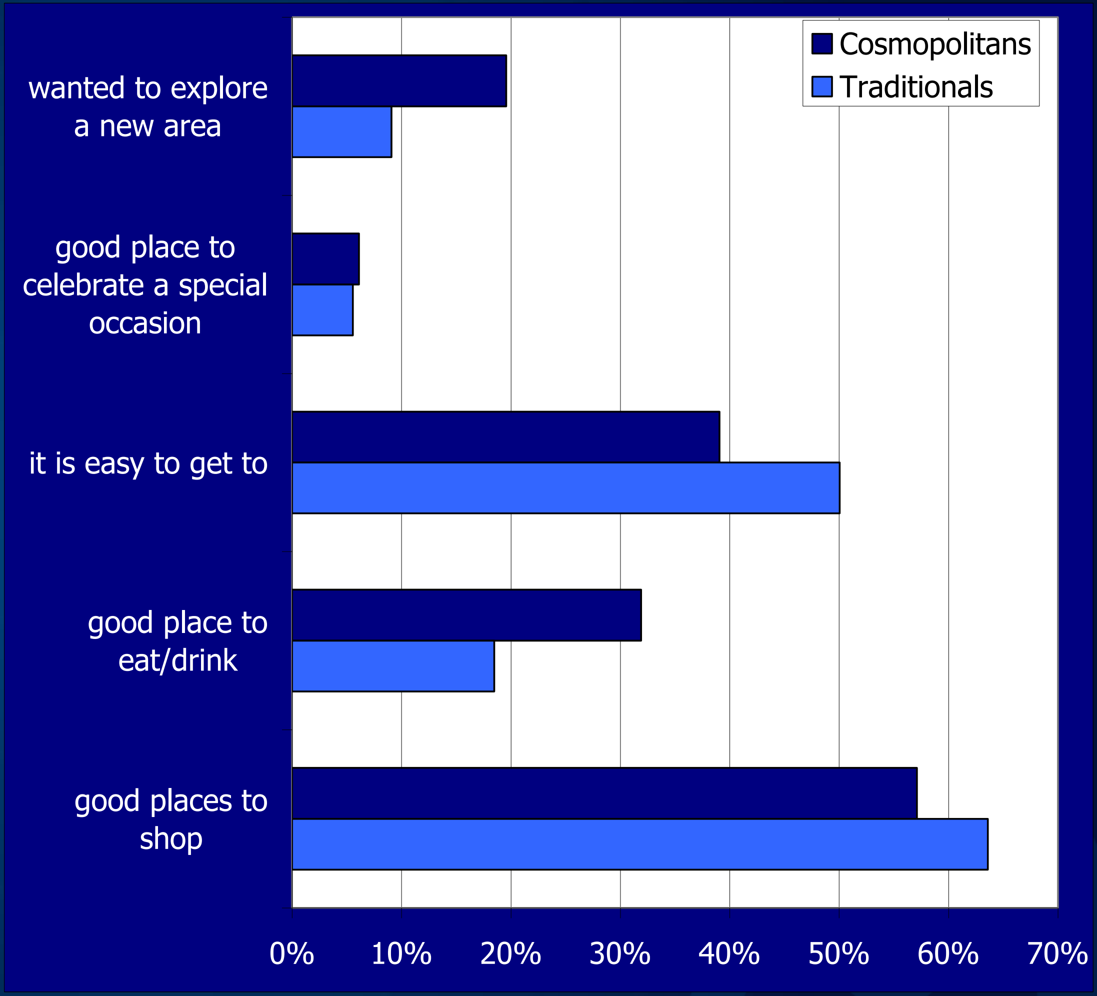
Shopping Destination Overview

- Over half of specific trips include a shopping element
- Common theme of Cosmopolitans, High Street and Discoverer profiles as shopping profiles

Source: VB National Day Visitor Research

Reasons for going on a **shopping** trip by Arkleisure segments

- Good places to shop and easy to get to are most important for both segments
- Cosmopolitans show a greater variety of important factors with good places to eat and drink and wanting to explore a new area



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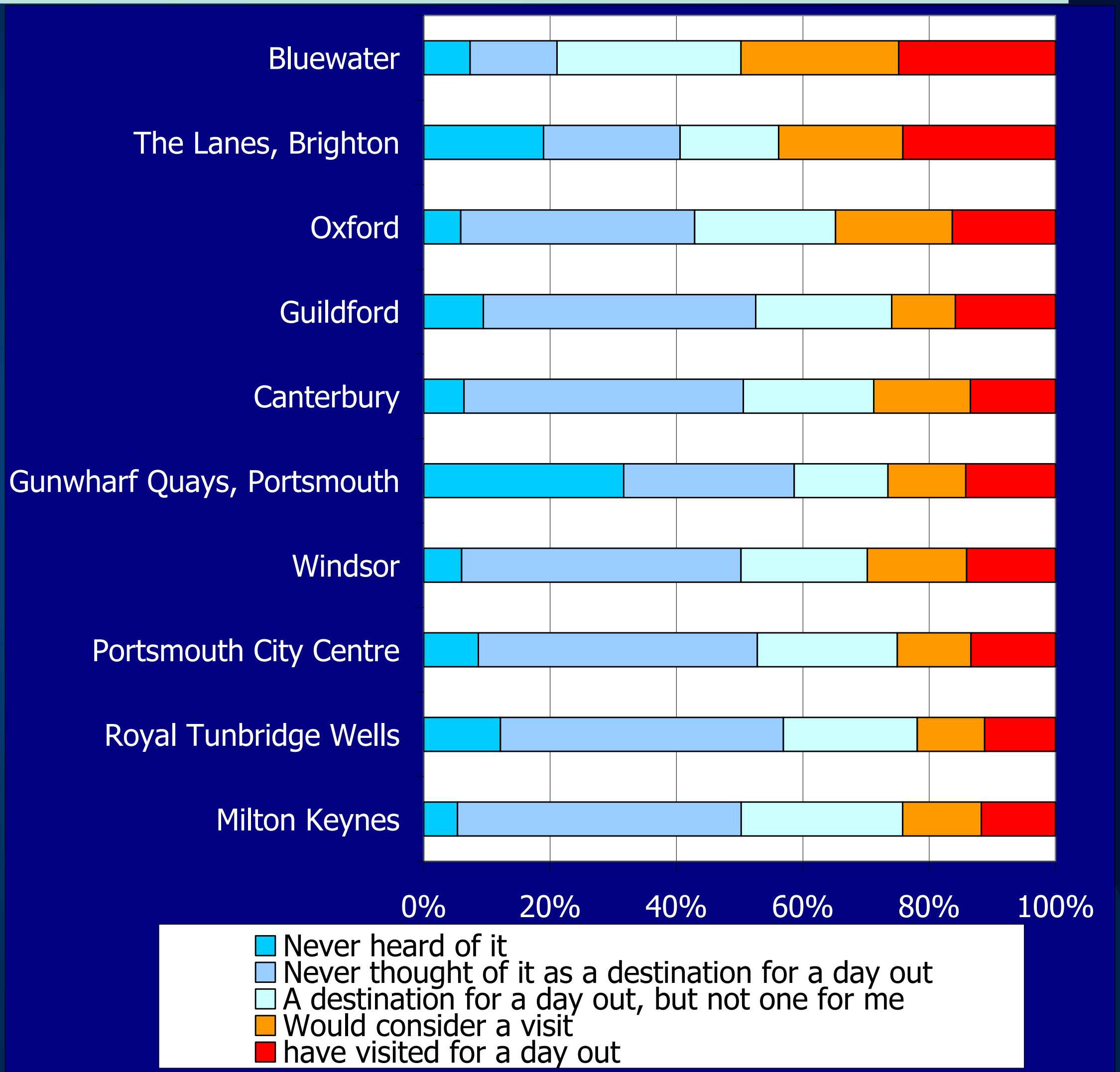
Shopping Trips

- The chart shows the relative propensity to visit
- levels of awareness as a shopping destination
- Implications for:
- Repositioning
- Messaging



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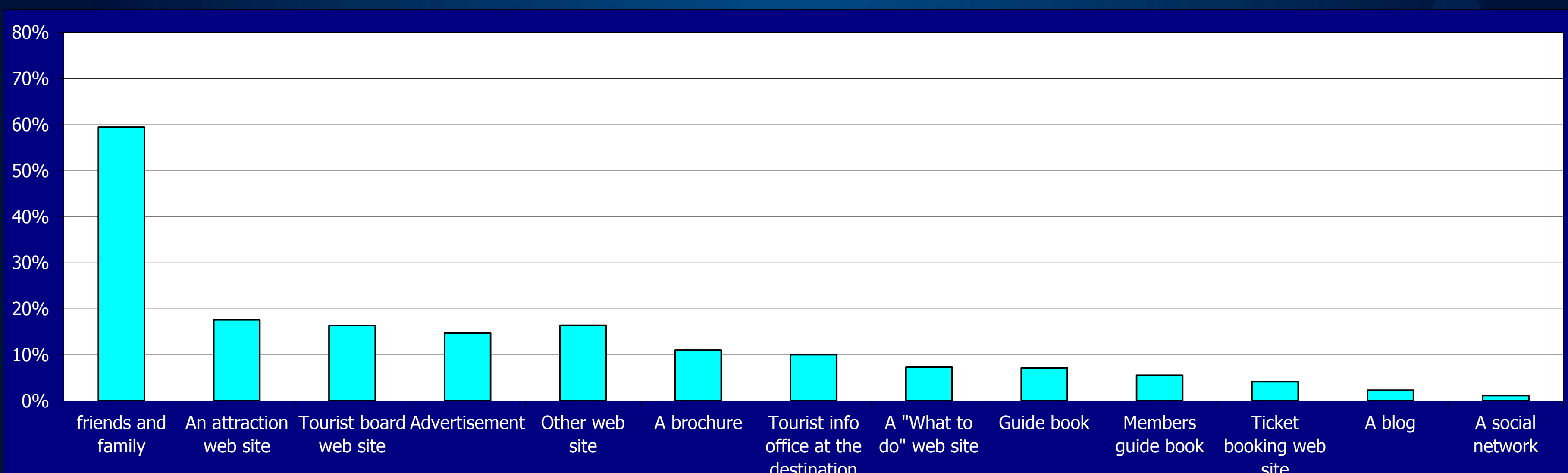
Shopping Trips: Information sources

- Friends and family (60%) are key influence in choosing shopping destination
- Other methods less influential as information sources – websites (15%) including both attraction and tourist boards.
- Blogs and social networks are not used as information sources (<2%)



Sample of 707 trips

Shopping : Motivators for choosing destination

Sample of 7

Shopping : Benefits for choosing destination

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Who is going shopping?

- More than 50% of shoppers are likely to be with husband/wife/partner
- 25% are shoppers with Family/friends with adults over 16 years old
- 18% are lone shoppers
- Unlikely shoppers are those with young families, the older age groups and business

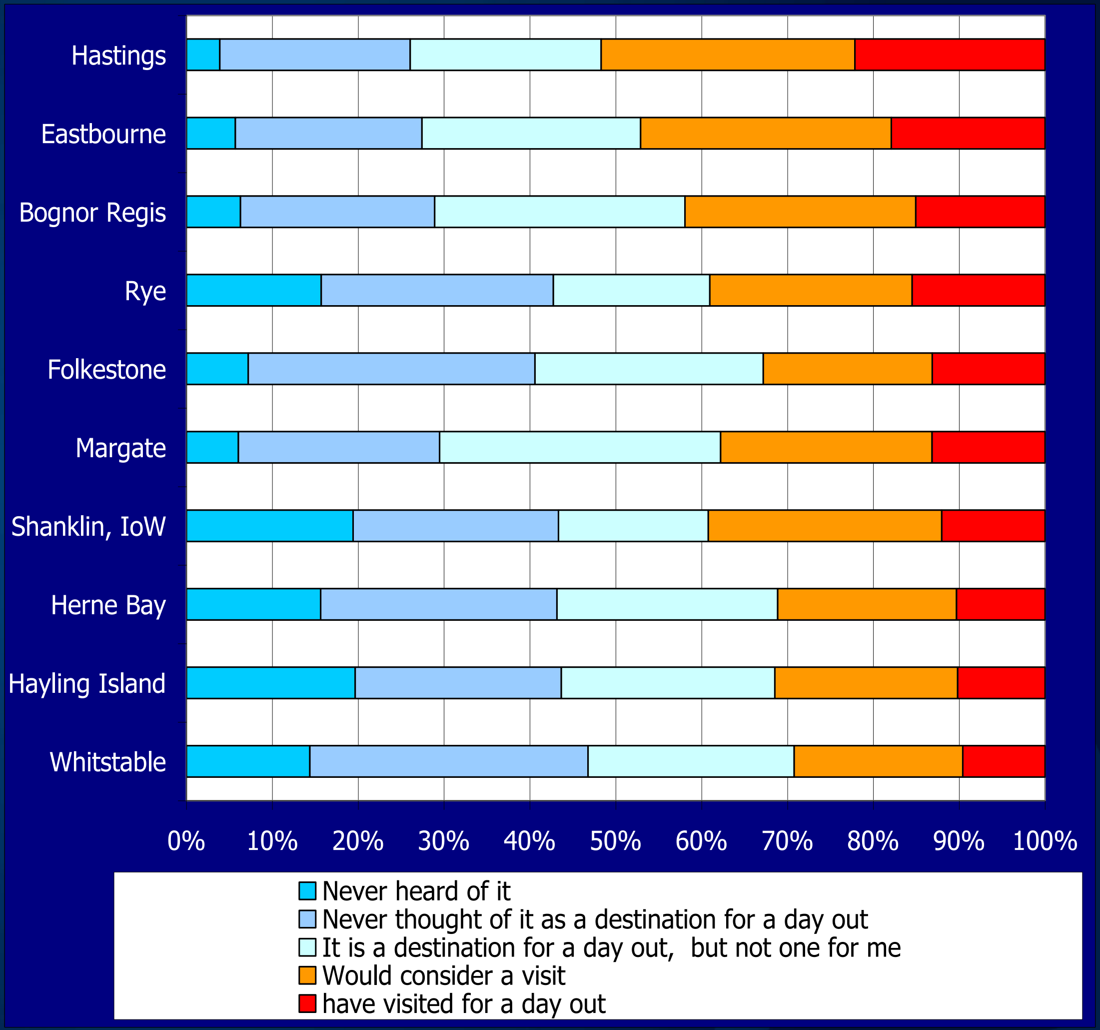
Source: VB National Day Visitor Research

Coastal Destination Overview

Source: VB National Day Visitor Research

Example Coastal Trips: Destination strength

- The chart shows the propensity to visit the prompted destinations
- Indicates level of awareness amongst respondents as a coastal destination to visit



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Coastal Trips: Information sources

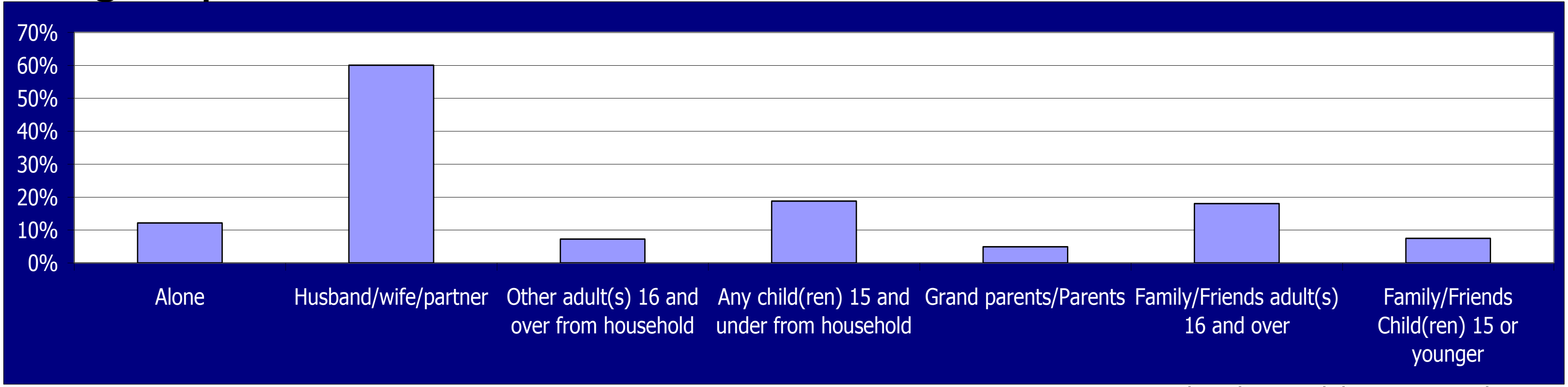
- For 51% of coastal trips information about the destination was sought before going on the trip
- Friends and family are again the most important source of information
- Internet websites – attraction, tourist board - is the second most important information source
- “A brochure” is used more for coastal destinations than for shopping trips (as shown earlier)

Source: VB National Day Visitor Research

Coastal Trips - Who is going on trip

Key visitors for coastal destinations are:

- a husband/wife/partner – couples
- families with young children (< 15 years old)
- By contrast - Grand parents rarely a part of the day trip group



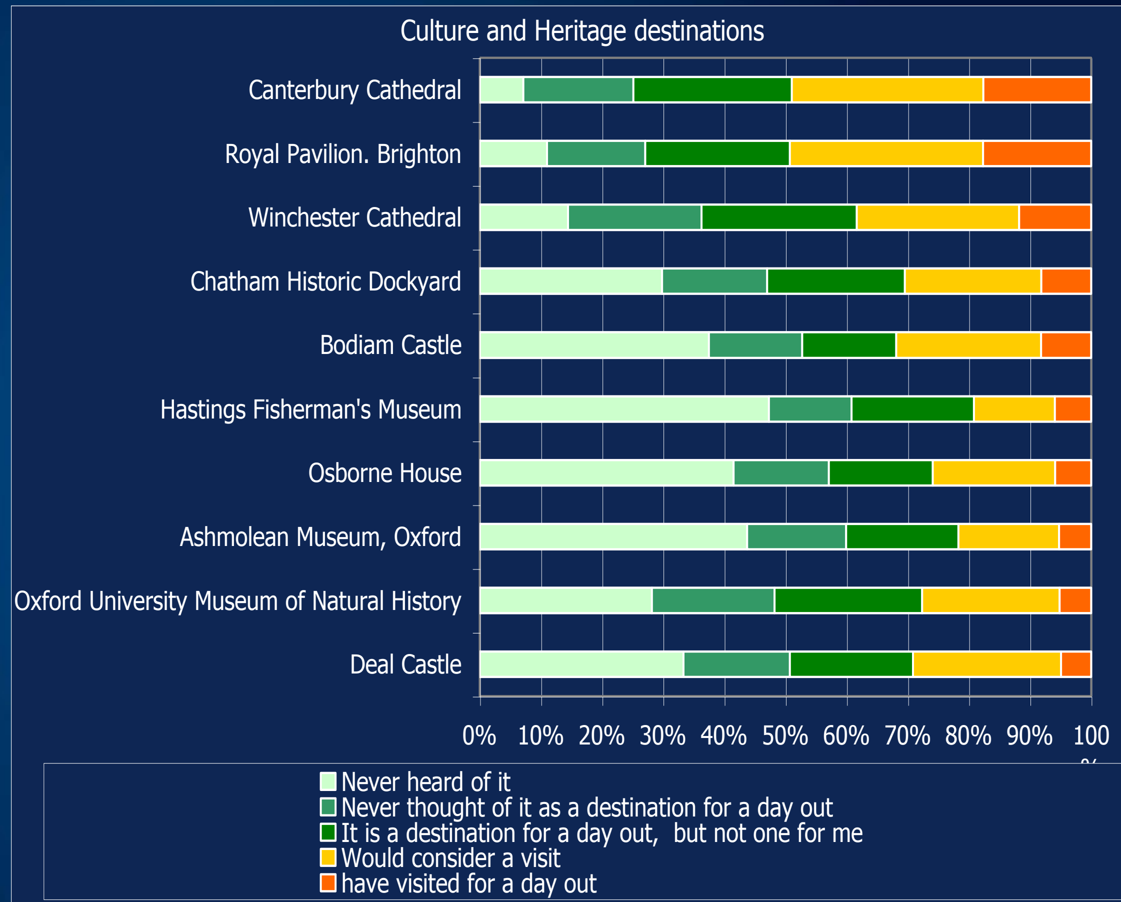
Source: VB National Day Visitor Research

Attractions Overview

Source: VB National Day Visitor Research

Perception of prompted attractions – Culture and Heritage destinations

- This gives us an insight into how many people know your attraction and those that never thought of it as a day out.
- It provides an opportunity to dig deeper and understand how you might reach these people.



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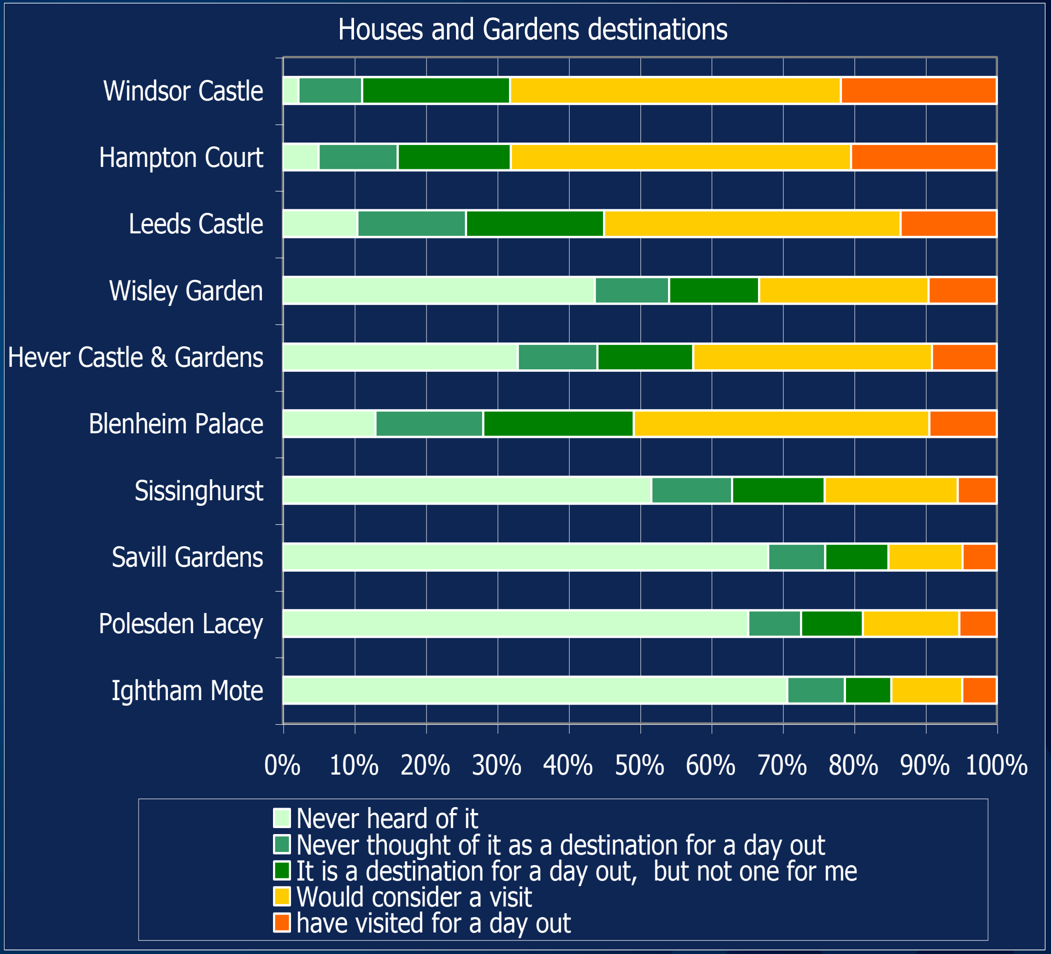
Perception of prompted attractions – Houses and Gardens destinations

- Shows the opportunity to convert those that would consider a visit - Windsor Castle, Hampton Court and Leeds Castle
- Several attractions in the Houses and Gardens category are not well known amongst respondents



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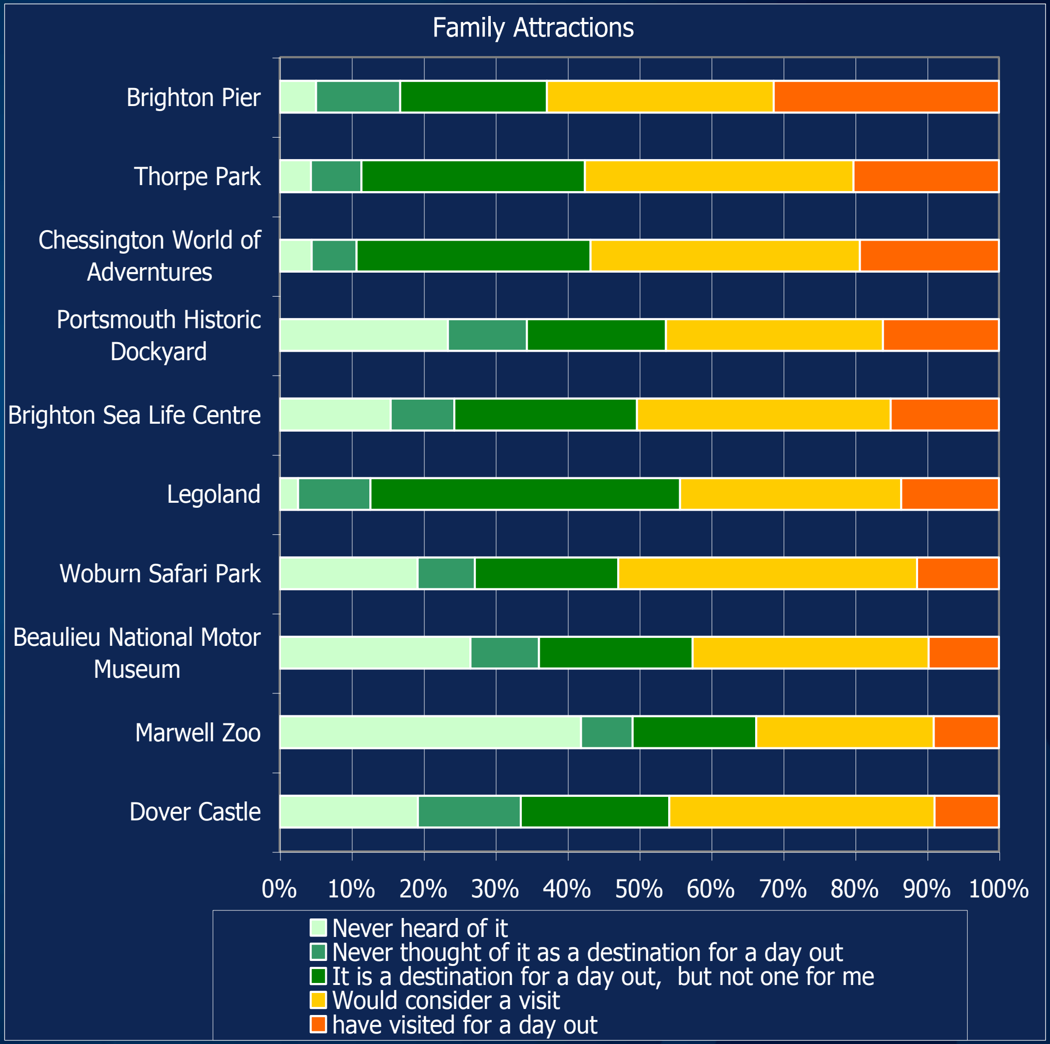
Perception of prompted attractions – Family Attractions

- Shows those that are recognised as 'Family' attractions
- White Knuckle Theme Parks such as Thorpe Park and Chessington World of Adventures are popular places for a day out



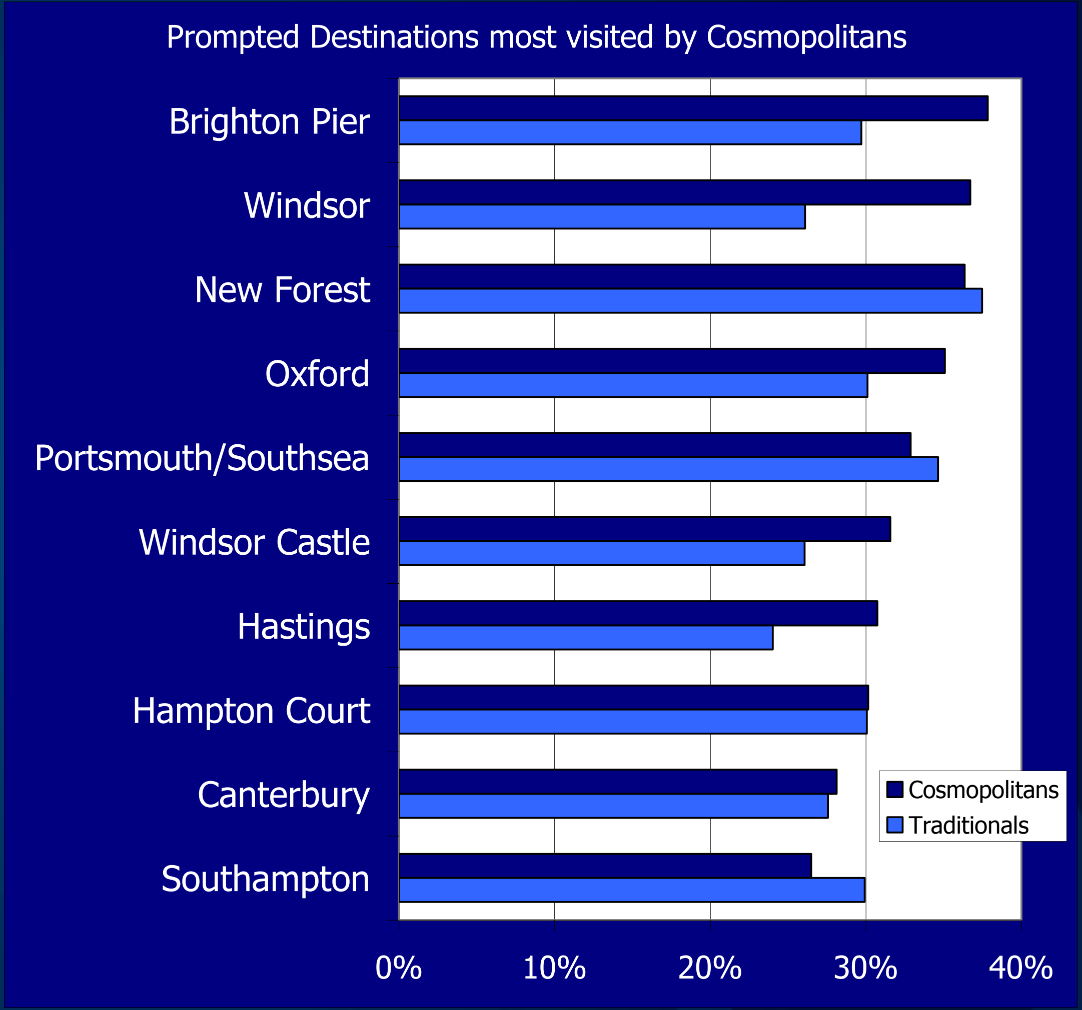
Profile of visitors to the three different type of attraction

- Traditionals are more likely to visit Culture and Heritage attractions than the other attraction types
- Cosmopolitans make up the largest proportion of visitors for Culture and Heritage and Gardens and Manor Houses
- For Family attractions the largest segment is High Street

Source: VB National Day Visitor Research

Where do they go - % visited in the past 2 years

- Brighton Pier is the most visited destination for Cosmopolitans, followed by Windsor and New Forest
- Canterbury has almost equal split of Cosmopolitans and Traditionals



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Brand Mapping

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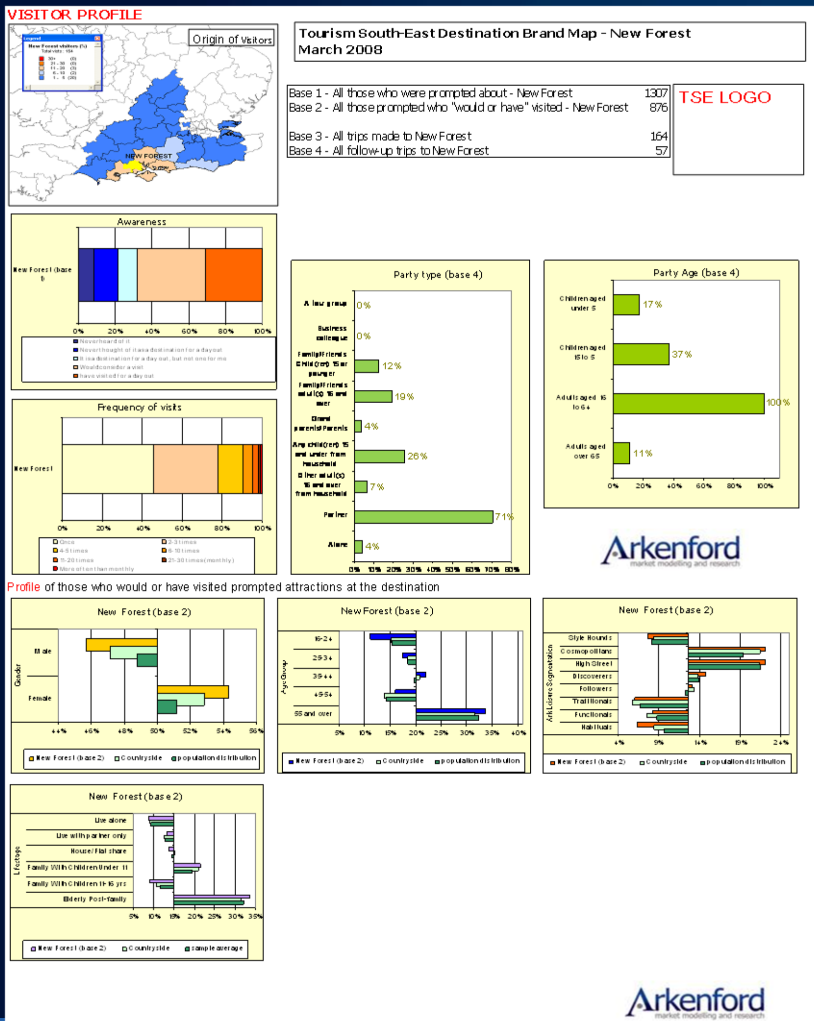
Destination Overview

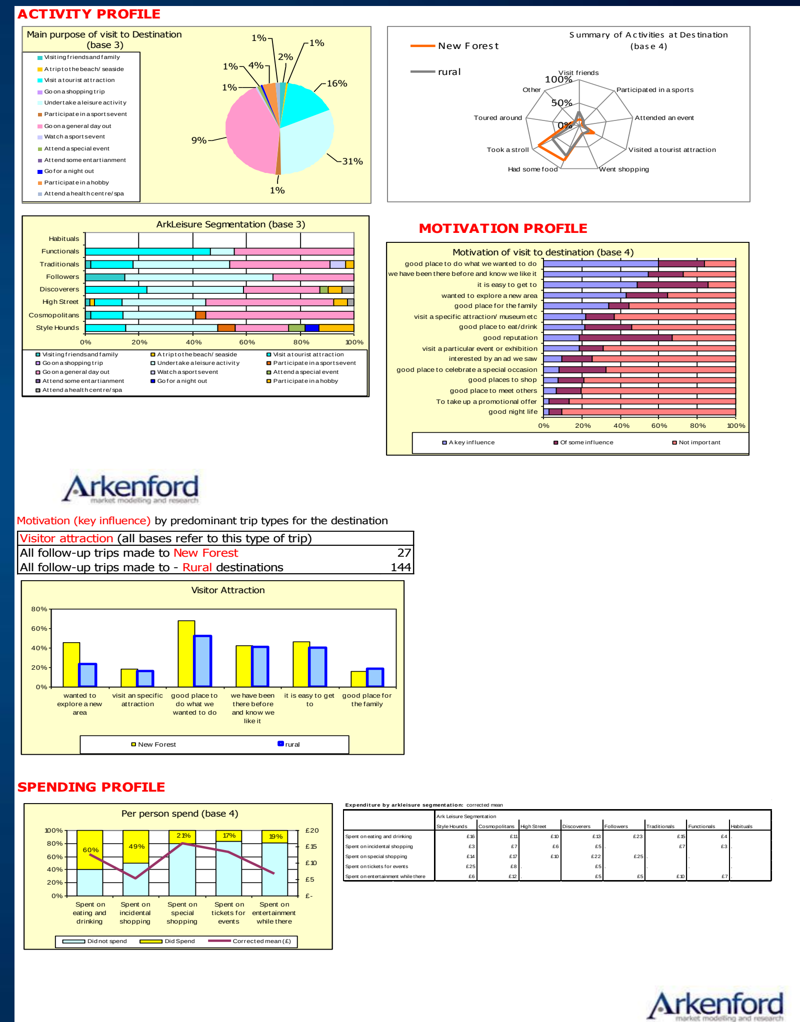
- The research collected details on approximately 3000 individual trips
- These are the 'last trips' to the region – regardless of destination – ie they include a complete cross section of destinations down to the smallest village or attraction
- This gives a representative picture of where people are going in the region by trip purpose
- However samples to specific destinations are often too small for destination level analysis so the data is analysed by:
  - grouping into 'Types of Destination' e.g. seaside, shopping

Example for a Destination Brand Map

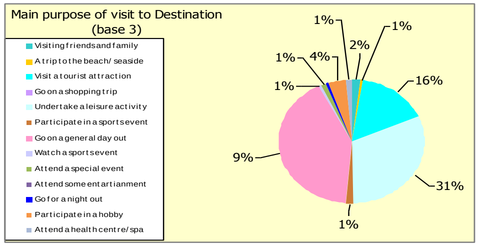
- The survey has created a vast amount of information on different trip types and destination types
- All the information collected can be used to create brand maps
  - For individual destinations (where we have a big enough sample in the follow up survey)
  - For DPUK categories
  - For main trip purpose
- The following sheet shows a brand map for the individual destination "New Forest"
- It contains information from both the main and follow up surveys as well as information from prompted and unprompted questions
- The charts show the base size in brackets, e.g. awareness and perception of the destination is based on all respondents who were prompted about their awareness – 1307 respondents

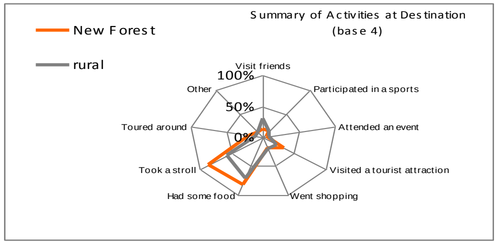
Example for a Destination Brand Map – New Forest

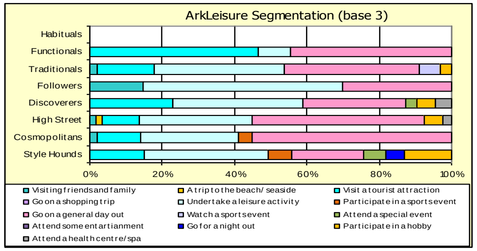




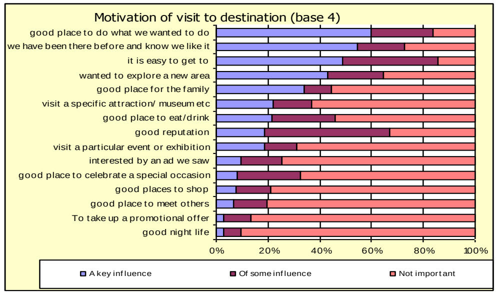
ACTIVITY PROFILE





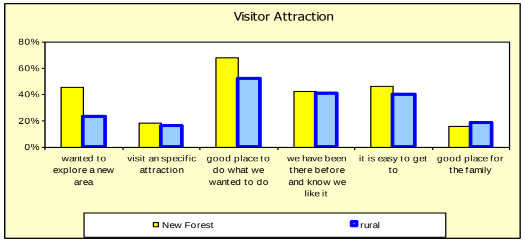


MOTIVATION PROFILE

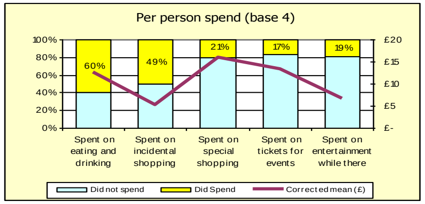


Motivation (key influence) by predominant trip types for the destination

Visitor attraction (all bases refer to this type of trip)	
All follow-up trips made to New Forest	27
All follow-up trips made to - Rural destinations	144



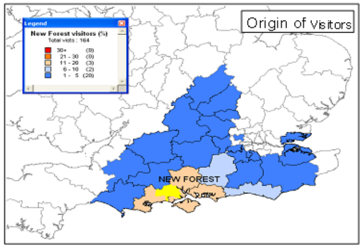
SPENDING PROFILE



Expenditure by arkleisure segmentation: corrected mean

	Ark Leisure Segmentation							
	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
Spent on eating and drinking	£16	£11	£10	£13	£23	£15	£4	.
Spent on incidental shopping	£3	£7	£6	£5	.	£7	£3	.
Spent on special shopping	£14	£17	£10	£22	£25	.	.	.
Spent on tickets for events	£25	£8	.	£5	.	.	.	.
Spent on entertainment while there	£6	£12	.	£5	£5	£10	£7	.

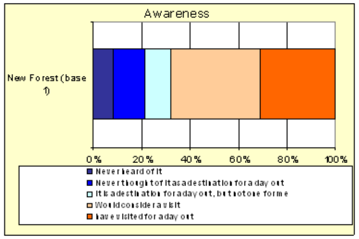
VISITOR PROFILE

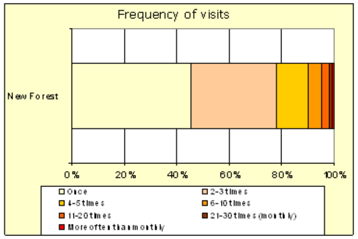


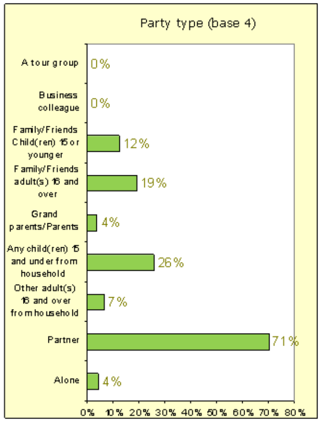
Tourism South-East Destination Brand Map - New Forest
March 2008

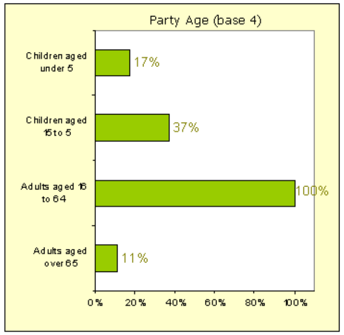
Base 1 - All those who were prompted about - New Forest	1307
Base 2 - All those prompted who "would or have" visited - New Forest	876
Base 3 - All trips made to New Forest	164
Base 4 - All follow-up trips to New Forest	57

TSE LOGO









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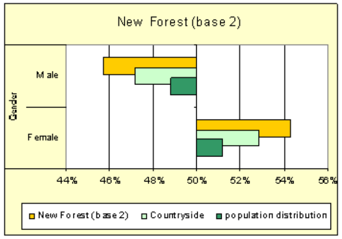
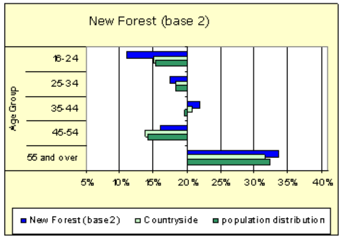
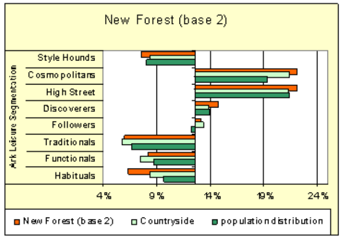
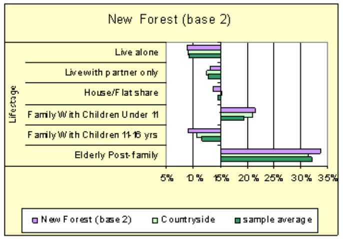
Profile of those who would or have visited prompted attractions at the destination









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How can we best use this research?

TSE will use this data to develop overall day visitor strategy

Provide detailed information and support to South East destinations

(data on 150 destinations subject to sample size)

Day Visitor Strategy

Headline summaries on SE Day Visitor
(not destination specific)
Who takes them (age, demographics, ark seg)
What activities they do, what motivates them
How best to communicate to them

Develop a segmentation based on motivations and what consumers look for on a day out

Day Visitor Strategy

Core Destination Profile Reports

Shopping – Culture and Heritage – Seaside – Houses and Gardens – Events – Countryside – Towns and Cities – Family Attractions - Sports (not destination specific)

Arkleisure Profile Reports

Visitor profile (age, demographics, ark seg)
What activities and motivation they have
How best to communicate to them
Products attracted to

Information and Support to Destination Managers

- Data to enable Destination Managers to plan strategies and campaigns, identify linkages with similar destinations
- Destination brand maps including individual attractions where sample allows
- Online tool to interrogate research data – available as ‘browser’ on desk top
    - Segment profiles
    - Destination profiles
    - Media/communication channels
    - Identify clusters of destination types/products that act as ‘hooks’ to day visitor segments

Thank You and Questions