



# Great Britain Day Visits Survey

Summary of review and revised  
headline results

27th March 2017

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# 1. Introduction

## Background

GBDVS has operated continually since January 2011 with online survey waves undertaken in every week of the year. An entirely consistent survey approach was followed during the first five years of the survey up to and including December 2015.

During this period the survey operated on a stand-alone basis with no changes made to the data collection methods, quota targets, questionnaire content or data processing approaches (for example approaches used for weighting, filtering of data into sub groups, etc.).

However for the 2016 survey the following changes were identified as necessary and implemented from January 2016:

- *Questionnaire improvements to make the survey more engaging and easy to complete:*

The primary reason for making these changes was to ensure that the survey could just as easily be completed on a mobile device as on a PC.

It was agreed with the GBDVS client group that these changes should be made to allow for the increasing demand from respondents to participate in the survey using a mobile device. Evidence from the first 5 years of GBDVS surveying suggested that whilst an increasing proportion of respondents wanted to complete the survey using a mobile phone, levels of drop out were higher amongst this group due to certain questions not being suited to smaller screens.

The changes made involved the simplification of certain questions by, for example, reducing the number of answer options provided and splitting questions with long lists of answer options over a number of screens/sub-questions.

It was expected that these improvements would make the questionnaire easier to complete and more engaging for all respondents including both those using a mobile device and those completing using a PC.

- *Questionnaire revisions required as part of the 'merging' of GBDVS with the GBTS online piloting:*

Piloting of the GBDVS 'sister' survey the Great Britain Tourism Survey (GBTS) using an online approach commenced in January 2016. It was agreed that the most efficient and cost effective way to conduct this online test was to add the GBTS questions to the ongoing GBDVS survey.

In practice this change involved the introduction of a number of the GBTS introductory/ screener questions to be asked prior to the existing GBDVS questions and the removal of a historic GBDVS question regarding overnight trips as it had become redundant due to the additions. With these changes some minor 'tweaking' was also required in the wording of questions to make the text clear and to ensure consistency between the two surveys.

As part of the GBTS online piloting some respondents received a questionnaire which had more significant changes to ordering, for example asking all of the GBTS questions of respondents prior to GBDVS. However, none of the data from the respondents in these survey cells was used in production of final GBDVS data.

- *From January 2016 the weekly sample size contacted for the survey increased from 673 to 1,000:*

This change was made to facilitate the above online piloting of GBTS to ensure that sufficient sample sizes were asked different versions of GBTS questions. Making this change meant that instead of all respondents being sourced from the Lightspeed panel a wider range of panel partners were used than in previous years.

Other than these changes, all other aspects of the survey administration remained consistent, including the profile of target quotas and data processing approaches.

All of these changes were implemented from the start of January 2016. No other changes have been made to the survey approach since that date.

### **Measuring the impact of changes**

While the annual day visit volume estimates produced from GBDVS were fairly consistent between 2011 and 2015, from the start of January 2016 the average number of leisure day visits recorded by survey respondents increased significantly.

Over the course of 2016, the average number of 3 hour+ duration visits reported was 1.31 – 26% higher than the 1.04 average recorded in 2015. This increase in the number of visits reported per respondent translated to a corresponding increase in estimates of total visit taking across the GB population for 2016 - a 21% increase in 3 hour+ visits and 20% increase in Tourism Day Visits. By comparison, in previous years the largest year on year change was an 8% decline recorded between 2012 and 2013.

Given the scale of these increases a detailed review was undertaken in early 2017 to understand to what extent the reported increases in visit taking were a result of the changes made to the survey, as opposed to real changes, reflective of the population's visit taking behaviour.

As part of this review, to measure the impact of the questionnaire changes a parallel test was undertaken in February/March 2017. This test was undertaken by including GBDVS questions on two waves of the TNS online omnibus (fieldwork from 23<sup>rd</sup> February to 2<sup>nd</sup> March). During this period 1,237 respondents completed the questionnaire used since January 2016 while 1,238 completed the pre 2016 version of the questionnaire. Respondents were randomly allocated to each questionnaire resulting in an identical demographic profile in each cell.

A more detailed report of this review and parallel test is available separately.

In summary it was concluded that the combination of small changes made to the GBDVS questionnaire had worked together to increase levels of visits reported by respondents by around **15%**.

The primary impacts of the questionnaire changes could be broken down as follows:

- **Increased volume of leisure day visits (any duration) reported** - small alterations to the framing of an initial question regarding total leisure participation appeared to have made respondents clearer that the question related to any leisure participation out of the home, however incidental, not just on 'days out' or 'overnight visits'. Also in the question which recorded numbers of visits taken in each of the last 7 days a move from automatically populating incomplete answer boxes with zeros to 'forcing' respondents to provide a response for each day may have resulted in a decreased level of zero reporting.

*In the parallel test those respondents completing the 2016 questionnaire version recorded 8 percent more leisure day visits than those using the pre-2016 version.*

- **Increased proportion of leisure day visits recorded as lasting over 3 hours** – a change to the presentation of the duration of visit question (from one large grid to multiple screens) appeared to have increased respondent engagement resulting in a relatively small increase in the proportion of visits reported as lasting 3 hours or more. However this relatively small change in visit duration profile had a fairly large impact on the average volume of visits reported which fell within the ‘qualifying’ 3 hour+ duration (i.e. within the scope of visits reported by GBDVS).

*In the parallel test those respondents completing the 2016 questionnaire version recorded 15 percent more leisure day visits lasting 3 hours or more than those using the pre-2016 version. This increase would be reflected in visits reported for the Tourism Day Visit sub-set.*

The review also concluded that (as expected) changes made to the questionnaire increased the proportion of respondents completing the survey using a mobile device (from 17% in 2015 to 22% in 2016). Analysis of levels of visit taking by device used to complete the survey suggested that those who completed using a mobile typically took part in more leisure visits (+28% visits during 2016). Therefore the increased mobile participation in the survey may have contributed further to the year on year increase. It was estimated that up to 2% of the year on year increase could be related to this change.

The review also considered the potential impact of the wider range of survey panels used to source GBDVS respondents in 2016 (required due to larger sample size). There was some evidence that members of the panels used more in 2016 than in previous years were more likely to take part in leisure day visits. It was estimated that up to 3% of the year on year increase could be related to this change.

### **Tourism Day Visits (TDV) filter issue**

Separate to the changes described above, during end of year data checks undertaken in early 2017, a data processing error was identified in the GBDVS dataset.

This error impacted upon results produced for Tourism Day Visits (TDVs) taken in London and therefore total for England and GB as a whole.

TDVs are a sub-set of the total base of 3 hour+ leisure visits recorded by GBDVS (all leisure visits lasting 3 hours or more are recorded) - during data processing stages these visits are identified using a set of rules relating to a respondent’s place of visit, their visit destination, the activities undertaken on their visits and the regularity of taking the visit. During 2016, an error in the application of this set of filter rules meant that interim results produced for the volumes of TDVs taken in London were under estimated. As such estimates for all of England and Great Britain as a whole were also under estimated.

This issue had no impact on results reported for the wider 3 hour+ day visit definition or for results reported for Scotland, Wales or any of the English regions outside of London.

Following the identification of this error GBDVS annual results for 2016 were re-run with the correct TDV filter rules applied. The impact of this correction was an increase in the volume of visits taken in London assigned as TDVs and a corresponding impact on the England and GB totals.

## 2. Revised GBDVS estimates

Table 1 below provides GBDVS survey data revised as follows:

**A)** To incorporate the correction needed to address the TDV data processing issue. This results in an increase in 2016 estimates for England and Great Britain.

**B)** To take account of the impact of the changes made to the GBDVS questionnaire from January 2016 using the findings of the review of changes and parallel run described previously. On this basis all estimates of visits for 2011 to 2015 have been increased by a factor of 15% to allow a meaningful comparison of year on year trends.

TABLE 1 – INITIAL AND REVISED TDV ESTIMATE 2015 – 2016									
	INITIAL TDV ESTIMATES			A) TDV ESTIMATES CORRECT FILTER RULES APPLIED			B) FINAL REVISED TDV ESTIMATES – INCLUDING UPLIFT OF 2015 RESULTS		
	2015 visits (m)	2016 visits (m)	% change 2015- 2016	2015 visits (m)	2016 visits (m)	% change 2015- 2016	2015 visits (m)	2016 visits (m)	% change 2015- 2016
<b>GB</b>	1,525	1,739	<b>+14%</b>	1,525	1,834	<b>+20%</b>	1,754	1,834	<b>+5%</b>
<b>England</b>	1,298	1,462	<b>+13%</b>	1,298	1,557	<b>+20%</b>	1,493	1,557	<b>+4%</b>

Following this approach the final revised estimates suggest that the GB level the real year on year change in volume of visit taken was +5%.

Further revised estimates for Tourism Day Visits by country, region and quarter on the basis of volume of visits and value are provided on the following pages.

**TABLE 2 – CHANGE OVER TIME IN HEADLINE VOLUME AND VALUE OF VISITS**

VISITS	2011-2015 data adjusted by +15% to enable comparison with 2016					Actual 2016 (corrected)	2015/ 2016  % change (estimated)
	2011	2012	2013	2014	2015	2016	
	Millions	Millions	Millions	Millions	Millions	Millions	
England	1,503	1,687	1,576	1,547	1,493	1,557	4%
<b>GB total</b>	1,777	1,969	1,826	1,823	1,754	1,834	5%
EXPENDITURE	2011	2012	2013	2014	2015	2016	2015/ 2016  % change (estimated)
	Millions	Millions	Millions	Millions	Millions	Millions	
England	49,071	55,728	52,928	51,866	53,385	53,534	0%
<b>GB total</b>	59,846	65,610	62,039	61,833	61,942	63,904	3%
EXPENDITURE (2016 prices)*	2011	2012	2013	2014	2015	2016	2015/ 2016  % change (estimated)
	Millions	Millions	Millions	Millions	Millions	Millions	
England	53,263	58,899	54,842	53,475	54,987	53,534	-3%
<b>GB total</b>	64,960	69,343	64,284	63,752	63,801	63,904	0%

**TABLE 3 – REVISED TDV ESTIMATES - CHANGE OVER TIME IN HEADLINE VOLUME OF VISITS – BY ENGLISH REGION**

	2011-2015 data adjusted by +15% to enable comparison with 2016					Actual 2016 (corrected)	2016/2015  % change (estimated)	3 yr Average 2011-2013	3 yr Average 2014-2016	% change (estimated)
	2011	2012	2013	2014	2015	2016		Millions	Millions	
	Millions	Millions	Millions	Millions	Millions	Millions		Millions	Millions	
<b>English Regions</b>										
North East England	49	86	85	72	64	75	17%	74	71	-4%
North West England	199	196	184	184	183	191	5%	193	186	-4%
Yorkshire and The Humber	160	162	154	152	138	149	8%	159	146	-8%
East Midlands	107	128	118	109	112	119	7%	118	113	-4%
West Midlands	125	147	153	137	131	142	8%	142	137	-4%
East of England	155	145	151	150	136	140	3%	150	142	-6%
London	314	362	301	315	322	337	5%	326	325	0%
South East England	231	282	252	261	248	242	-3%	255	250	-2%
South West England	162	181	177	168	156	161	3%	173	162	-7%

**TABLE 4 – CHANGE OVER TIME IN HEADLINE VALUE OF VISITS – BY ENGLISH REGION**

	2011-2015 data adjusted by +15% to enable comparison with 2016					Actual 2016 (corrected)	2016/2015  % change (estimated)	3 yr Average 2011-2013	3 yr Average 2014-2016	% change
	2011	2012	2013	2014	2015	2016		Millions	Millions	% change (estimated)
	Millions	Millions	Millions	Millions	Millions	Millions		Millions	Millions	
<b>English Regions</b>										
North East England	1,256	2,843	3,251	2,561	2,361	2,363	0%	2,450	2,428	-1%
North West England	6,702	6,203	6,491	6,176	6,642	6,958	5%	6,465	6,592	2%
Yorkshire and The Humber	4,106	4,372	4,859	4,769	4,256	4,370	3%	4,446	4,465	0%
East Midlands	4,033	3,826	3,351	2,974	3,784	4,486	19%	3,737	3,748	0%
West Midlands	3,616	4,500	5,552	4,442	5,396	4,207	-22%	4,556	4,682	3%
East of England	4,396	4,399	4,750	4,500	4,055	3,532	-13%	4,515	4,029	-11%
London	11,288	14,780	10,606	12,342	13,307	14,376	8%	12,225	13,342	9%
South East England	8,148	8,679	8,158	8,707	7,621	8,602	13%	8,328	8,310	0%
South West England	5,526	6,127	5,909	5,395	5,964	4,639	-22%	5,854	5,333	-9%

### 3. Using previously published GBDVS estimates

It should be noted that due to the error in TDV filter applied to 2016 London data (see page 3), all interim TDV level data for GB and England that was included in published monthly reports should not be used.

This error did not affect the 2016 interim data published for English regions, Scotland or Wales or any data at the 3 hour+ visit level.

Also this error does not affect any data published for the 2011 to 2015 period including annual and monthly reports. As such this data can continue to be used to understand trends between 2011 and 2015 or to understand the structure and composition of the day visit market within individual years.

The revised estimates for the 2011-2015 period provided in Section 2 of this report are approximations which can be used to facilitate the comparison of results and understanding of trends between this period and 2016.