GLAECONOMICS

Current Issues Note 38

The Great Britain Day Visitor Survey 2011 – a London analysis

By **Simon Kyte**

MAYOR OF LONDON

copyright

Greater London Authority
November 2012

Published by
Greater London Authority
City Hall
The Queen's Walk
London SE1 2AA
www.london.gov.uk
enquiries **020 7983 4000**
minicom **020 7983 4458**

ISBN: **978-1-84781-532-3**

Cover photograph
© Daryl Rozario

For more information about this publication, please contact:
GLA Economics
telephone 020 7983 4922
email glaeconomics@london.gov.uk

Contents

Executive Summary

Information on day visitors has always been the weakest link in national tourism intelligence. The Great Britain Day Visitor Survey 2011 (GBDVS-11) was commissioned jointly by Visit England, Visit Scotland and Visit Wales / Croeso Cymru in order to address this gap in knowledge. The online survey undertaken by TNS Research had a tourism day visitor respondent base in London of 2,990.

Once adjusted to the Greater London boundary, there were 297 million tourism day visitors to the capital in 2011 with total spend approaching £10.9 billion. Average spend per visit was £36.60 but almost a quarter of respondents claimed to have spent nothing at all. Greater London accounts for over one fifth of tourism day visitor expenditure across Great Britain as a whole. The vast majority (84 per cent) of day visits to London started from home.

A core 'central area' (The City, Westminster, Kensington & Chelsea, Islington and Camden) accounted for more than half of London tourism day visitor spend. Visiting friends or family was the most frequently identified main activity undertaken but it was relatively low spend. The highest spend per tourism day visit to London was 'non-routine shopping'.

Seven out of ten tourism day visitors to London actually came from Greater London and a large share of the remainder came from neighbouring regions. The mean duration of visit in the capital was 5 hours and 21 minutes (including travel time); 24 per cent of visits exceeded six hours in duration. The mean reported distance travelled was much lower in London than for the rest of the country at just 29 miles. As would be expected, there was also much more of a mix of modes of transport with less than one third using their own car compared to twice that share in England as a whole. Most day visitors seemed more than satisfied with their experiences.

This Current Issues Note also makes some detailed comparisons with the previous, limited data available on day visits in an attempt to isolate how the levels of day visits to London and their expenditure has varied over time. Issues raised by the survey are discussed.

Introduction & background to the survey

Information on day visitors has always been the weak link in understanding London's tourism. Unlike the international and domestic overnight components of tourism, they have had only infrequent surveys in spite of the fact that day visitor expenditure is believed to be broadly equivalent to that of international visitors and domestic overnight visitors put together[1]. Details of the previous surveys can be found in GLA Economics' Current Issues Note 29[2]. The 2011 Great Britain Day Visitor Survey (GBDVS-11 from here on) represents a major advance in that understanding. Furthermore, fieldwork is on a weekly basis and will continue through 2012 at least, meaning that there will be at least one more year of data, most importantly, covering London's Olympic year.

GBDVS-11 was commissioned jointly by Visit England, Visit Scotland and Visit Wales / Croeso Cymru and delivered by TNS Research. Prior to the GBDVS-11 itself, Visit England and the English Tourism Intelligence Partnership (ETIP) commissioned a series of pilot surveys parallel testing different collection methodologies. Following the evaluation of these pilots, it was recommended that online data collection would be both cost effective and robust. Therefore the GBDVS-11 was undertaken using an online methodology with over 38,000 adults who were resident in England, Scotland or Wales during 52 weekly waves. Survey respondents were selected from an online panel with quotas based on age, gender, working status, socio-economic grouping and area of residence[3]. The final results were weighted to improve representativeness of the outputs informed by a programme of parallel off-line interviewing. The first stage of weighting corrected for non-response bias whilst the second stage involved the 'grossing up' of data on the leisure visits undertaken in the preceding seven days to produce estimates of total volume and value in each month of the year and, hence, over the year as a whole. Advice was taken from the Office for National Statistics (ONS) on the removal of outliers in the North East and South West regions.

In terms of tourism day visits there was a respondent base of 2,990 in London. During each survey wave, respondents were asked to give details of their general leisure participation and leisure activity visits of three or more hours over the previous week.

[1] For the comparable sizes of the sectors in 2010, see: GLA Economics Working Paper 53 - *Tourism in London* (May 2012). The working paper is available online at:
http://www.london.gov.uk/sites/default/files/wp-53.pdf
[2] GLA Economics Current Issues Note 29 – *Estimating the contribution of leisure day visitors to London's tourism industry*. Again, this can be found online at:
http://www.london.gov.uk/sites/default/files/glaecon-cin-29.pdf
[3] One side-effect of having adopted an online methodology was that the approaches usually followed to calculate confidence intervals could not be relied upon to provide a complete measure of accuracy.

Table 1: Visit respondent base by area of residence

	Leisure day visits	Leisure day visits (3hrs+)	Tourism day visits
LONDON	*	3,884	2,990
Rest of England	*	21,013	11,960
All England	**97,066**	**24,897**	**14,950**
Scotland	22,203	5,308	2,633
Wales	20,879	4,977	2,859
Great Britain	**140,148**	**35,182**	**20,442**

Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*

Any participation in any of the activities not at home but somewhere in the UK in Table 2 was treated as a leisure day visit. However, participation in more than one of these activities on the same trip still counted as just **one** leisure day visit. In the event of this type of visit, a main activity would be recorded.

Table 2: Activities included in the definition of a leisure day visit in GBDVS-11

1	Visiting friends or family for leisure
2	Special shopping for items not purchased regularly
3	Going out for a meal
4	Going on a night out to a bar / pub / club
5	Going out for entertainment – to a cinema, concert or theatre
6	Undertaking outdoor activities such as walking, cycling, golf etc.
7	Taking part in other leisure activities such as hobbies, evening classes etc. (outside home)
8	Taking part in sports, incl. exercise classes, going to gym etc.
9	Watching live sports events – not on television
10	Going to visitor attractions such as historic houses, gardens, theme parks, museums, zoological gardens etc.
11	Going to special public events such as festivals, exhibitions etc.
12	Going to special personal events such as weddings, graduations, christenings etc.
13	Going on days out to a beauty or health spa / centre etc.
14	Going on days out to explore an area
15	Going on day trips / excursions for other leisure purposes not mentioned above

Source: *Great Britain Day Visitor Survey 2011*

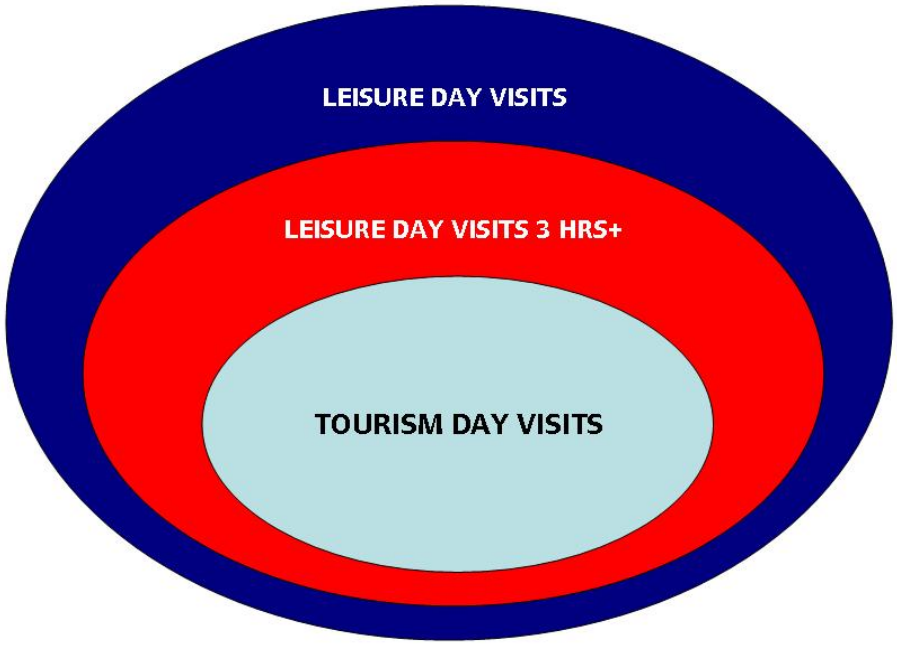
Respondents provided volume information for leisure day visits taken but were then asked for further details of leisure day visits lasting three or more hours. A subset of leisure day visits was 'leisure day visits lasting three hours or more' and a further subset of this was 'tourism day visits' as shown in Figure 1. A 'tourism day visit' as defined for the survey has the following characteristics:

- Involves at least one of the activities listed in Table 2;
- Lasts at least three hours – although that includes the time spent travelling there;
- Is not undertaken 'very regularly' as defined by the respondent;
- Involves a destination different from the place where the participant lives. For London this is supposed to mean outside the Borough of residence[4]. If the visit is taken from a workplace, the destination should be a different place from the workplace. However, the rule is **not** applied for the watching of live sports events, attending special public events or going to visitor attractions. This means that for these activities (and specifically, only these activities) respondents could be in the same place as they reside[5].

What constitutes 'very regularly' is problematic. For example, if a respondent holds a football season ticket and attends every other game, that may well be defined as 'regular'. However, that may still be less frequent than his / her training attendance at a gym which, on account of a greater degree of randomness in terms of days attended, may be defined as 'irregular'. Nevertheless, Visit England undertook a number of analyses looking at whether perceived regularity or actual frequency was a better filter for trips and concluded that perceived regularity was. The relationship between the three sets and sub-sets is summarised in Figure 1.

[4] Note that this has consequences for the proportion of those captured as tourism day visitors coming from Greater London itself.
[5] Note here that previous surveys also defined tourism day visits as a subset of leisure day visits of three hours or more but did not make requirements about being away from home (which does form part of the UNWTO's international definition).

Figure 1: Relationship between leisure day visits and tourism day visits



Source: *GLA Economics*[6]

The important thing to note is that it is not possible for a tourism day trip not also to be a leisure day trip and it is also impossible for it to have a duration of less than three hours (including travel time to the destination).

It is also important to recognise that the choice of an online methodology will have had impacts on the results which are not easy to determine or quantify. Although around 77 per cent of households have a home internet connection, it is known that those who left school at or before 16 and the over 65 years of age cohort are both under-represented amongst Internet users. Whilst it was possible for the survey to correct for the broad demographic skews, there is a need to accept that there may be differences in attitudes and behaviours between, for example, older people who have access to the internet and those who do not, even after having corrected for education, gender and the like.

[6] For London, prior to stripping out outliers and prior to adjustment from 'reported' to 'actual' boundaries, there were approximately £15 billion worth of leisure day trips, £12.2 billion of leisure day visits of three hours or more and £9.8 billion of tourism day visits.

Aggregate volume and value numbers for London

According to the Visit England / Visit Scotland / Croeso Cymru national report[7], London received 273 million day visitors in 2011 with a spend of £9.8 billion. However, these figures apply to those who 'reported' themselves to be visiting London rather than those people who were actually visiting a destination in Greater London. A significant proportion of people visiting parts of Greater London such as Kingston, Croydon, Enfield, Stratford or Bromley (i.e. parts of Greater London with historical links to neighbouring counties such as Surrey, Hertfordshire, Essex or Kent) believed themselves to be outside 'London'[8]. Once this is accounted for and the data reconstructed on the basis of the Greater London boundary both the number of visits and the spend are higher at 297 million visits and spend of nearly £10.9 billion. This is the definition of 'London' used in this Current Issues Note. Data have been reconstructed according to this definition consistently throughout this Current Issues Note.

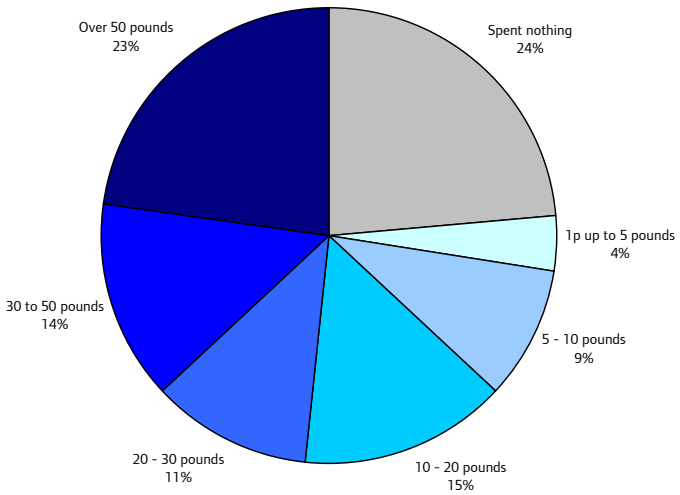
This yields an average spend per visit of £36.60[9].

However, a closer look at spend per visitor is required. Nearly a quarter (24 per cent) of tourism day visitors claimed to spend nothing at all. It is suspected that this is heavily skewed towards Londoners and those who commute during the week from neighbouring regions. In theory such travel spend should be apportioned but respondents are likely not to do so. Another 30 per cent spent an amount up to £20, a further quarter between £20 and £50 whilst the final 23 per cent spent in excess of £50 (although some amongst this group spent far more than this) as shown in Figure 2. Thirteen per cent of day visitors used some form of travel card they possessed already.

A more detailed analysis of higher spending day visitors is an area for possible future research.

[7] http://www.visitengland.org/Images/GBDVS%20Main%20Annual%20Report%20FV3%20-%2025%20%20May%202012_FINAL_tcm30-32969.pdf
[8] Note that the unadjusted methodology used by GBDVS-11 claims to be consistent with previous national day visitor surveys in terms the geographical definition of London.
[9] This is around 64p higher per visit than the value when calculated on the 'reported' figures.

Figure 2: Spend per tourism day visitor in GBDVS-11 (percentages)



Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*[10]

The more detailed questions regarding expenditure show broad similarity with the country as a whole as shown in Table 3. A notable exception is the proportion purchasing road transport fuel but this is to be expected given the lower proportion of visitors arriving by car.

Table 3: Items purchased on tourism day visits, London and Great Britain compared, GBDVS-11 (percentages)

Expenditure Area	Expenditure Item	London (% of visitors purchasing)	GB (% of visitors purchasing)	London - Average spend on purchase category (incl. zero spend) £	GB - Average spend on purchase category (incl. zero spend) £
	Any expenditure	76	72		
	No expenditure	24	28		
Transport	Road transport fuel	9	14	2.07	3.63
	Bus fares and car parking	12	19	1.36	0.85
	Rail, tram and Tube fares	22	9	3.73	1.61
	Water transport	1	1	0.15	0.20
	Air transport	*	*	0.26	0.16

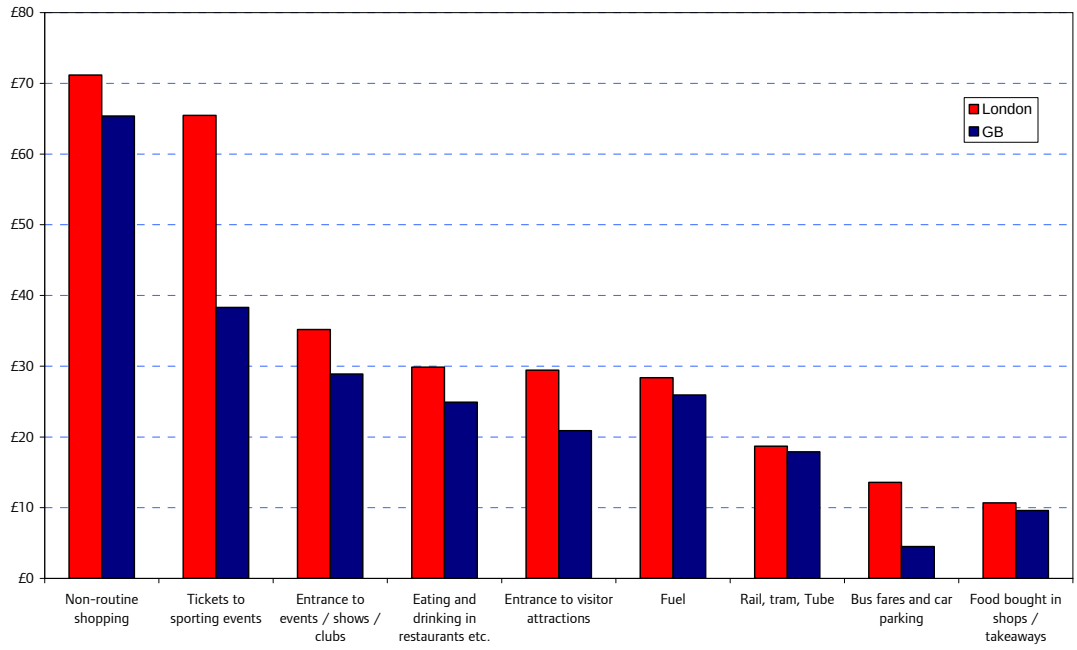
[10] Percentages in this chart have been recalculated to remove those who were unable to say how much they had spent. The average spend in the 'over £50' group was around £110. Note that GLA Economics estimates from the data that the mean spend for those who spent something was around £47.80.

	Vehicle hire	1	1	0.27	0.19
Food and drink	Eating and drinking in cafés, restaurants etc.	47	46	12.96	11.46
	Food bought in a shop or take-away	20	17	1.81	1.63
Admission charges	Entrance to visitor attractions	6	6	1.40	1.25
	Tickets to events, shows or clubs	11	8	3.35	2.31
	Tickets to sporting events	3	2	1.64	0.77
	Entrance to sports / leisure centres	2	1	0.31	0.21
Shopping	Non-routine shopping	9	10	5.55	6.54
Other	Package travel	1	1	0.94	0.77
	Other travel services	1	1	0.07	0.12
	Hiring of equipment	*	*	0.08	0.07
	Other	4	*	0.64	0.89

Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

The average spends shown in Table 3 above are not particularly meaningful in themselves since they include all those who spent nothing on that particular purchase category. For example, the average spend of tickets to sporting events was £1.64. However 97 per cent of respondents actually spent nothing on tickets to sporting events. In fact, the average spend amongst the three per cent who did was £65.46. Therefore, Figure 3 shows the average spend of those who did spend something on a particular purchase category for selected items for both London and Great Britain as a whole.

Figure 3: Average spend on purchase categories amongst those who did spend something on that purchase category in GBDVS-11 (£) – selected items, London and Great Britain



Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

As can be seen, spend in London on each and every item tended to be slightly higher than nationally. In the case of tickets to sporting events, spend in London is far higher than in the country as a whole, possibly representing a different mix or level of sporting events.

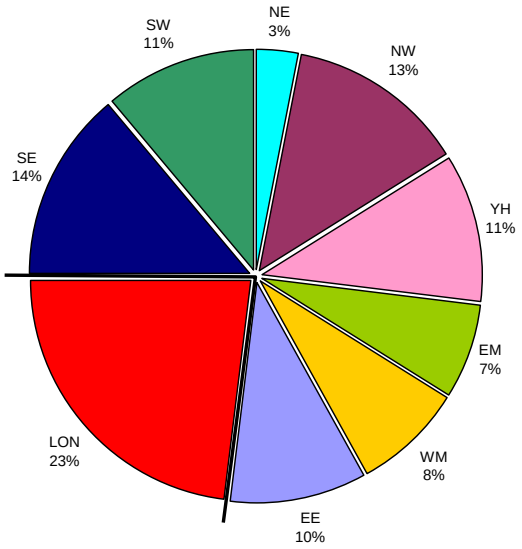
The £10.9 billion in Greater London accounts for over one fifth (21 per cent) of tourism day visit expenditure across Great Britain as a whole. London has a 19 per cent share of total Great Britain tourism day visitors. It is the only English region whose expenditure as a share of total tourism day visitor spend in Great Britain exceeds its population share. The next section examines tourism day visits to London when compared to other English regions.

London compared to other English regions

Once again, for the purposes of this report, London has been defined as the formal Greater London region[11]. On this basis, London accounts for:

- 23 per cent of tourism day visits across England – the largest share of any individual region, followed by the South East – as shown in Figure 4;
- 27 per cent of tourism day visitor spend across England – the largest share of any individual region, followed by the North West and the South East – as shown in Figure 5.

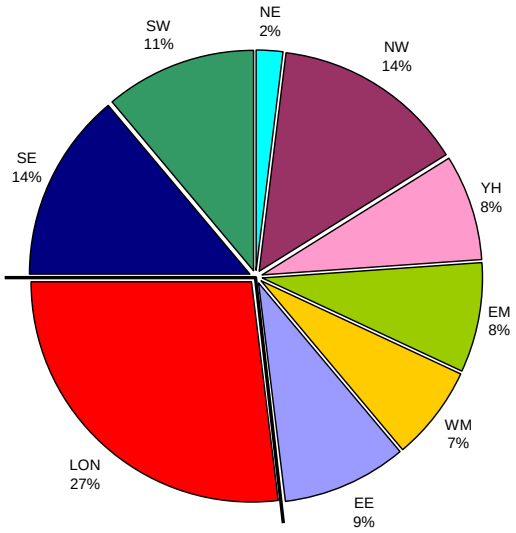
Figure 4: Tourism day visits in England by region



Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*

[11] This means that the figures will be inconsistent with those published in Table 2.1 of the national publication although figures are presented there as a share of Great Britain anyway. London and the South East are the two main regions affected. The difference between 'reported' and 'actual' region in the other English regions is minimal. The national report can be accessed at: http://www.visitengland.org/insight-statistics/major-tourism-surveys/dayvisitors/GBDVS2011.aspx

Figure 5: Tourism day visitor spend in England by region



Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*

Table 4 shows that London has the highest spend per visit of any region with the surprising exception of the East Midlands[12]. This should include travel costs but no specific attention was drawn to the London congestion charge in the questionnaire.

Table 4: Spend per visit by region (rounded to nearest 10p)[13]

English region	Spend per visit (£)
East Midlands	38.30
London	36.60
North West	34.10
South East	33.90
South West	33.90
West Midlands	29.20
East of England	28.00
North East	26.50
Yorkshire & the Humber	24.70

Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*[14].

[12] Note here that the East Midlands result seems to be driven by one local authority outlier. Most local authorities within the region have spends in the range between £25 and £30 so that average spend in Derbyshire, Lincolnshire, Northamptonshire and Leicestershire all fall within that range. In Nottinghamshire average spend was around £69, driven by an average spend in Nottingham itself of nearly £102.
[13] Average spend per visit for England as a whole was £32.65.
[14] Calculated on actual rather than reported region.

Profile of the London respondent base undertaking tourism day visits

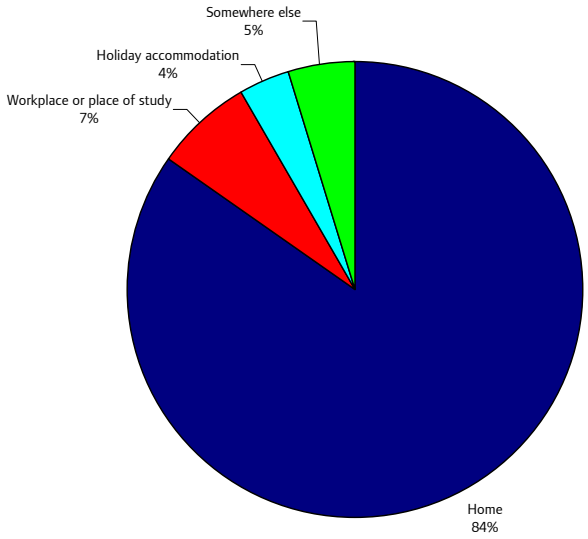
Gender

Female respondents were slightly more likely than males to have undertaken a tourism day visit. The only statistically significant exception to this was that males were more likely to have been on a night out.

Start point for tourism day visits

The vast majority of tourism day visits began from the home (84 per cent). Workplaces or places of study such as a college or university accounted for seven per cent of origins. Holiday accommodation appears here to account for day visits to London made from holiday accommodation either within or outside Greater London. The five per cent of trips which started 'somewhere else' will include staying with friends or relatives. Results are summarised in Figure 6.

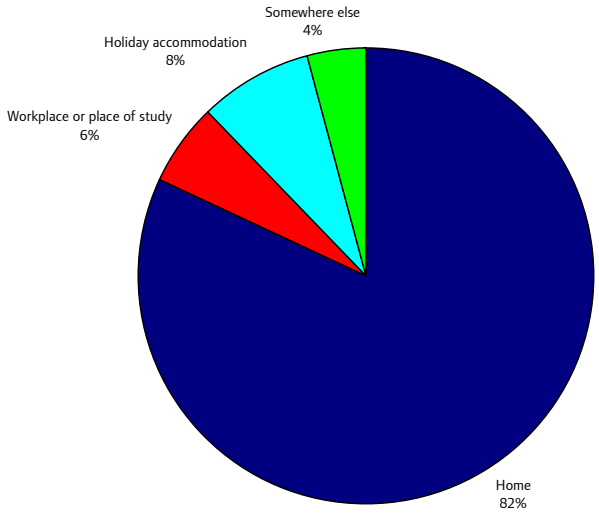
Figure 6: Start point of tourism day visits, GBDVS-11



Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

Note that the fact that some tourism day trips in the survey responses started from holiday accommodation may lead to some double- counting with domestic overnight tourism. Spend on day trips was noticeably higher amongst this category – more than twice the average, in fact - suggesting that some of the accommodation costs might have leaked into the survey as shown in Figure 7.

Figure 7: Spend of tourism day visitors by start point, GBDVS-11

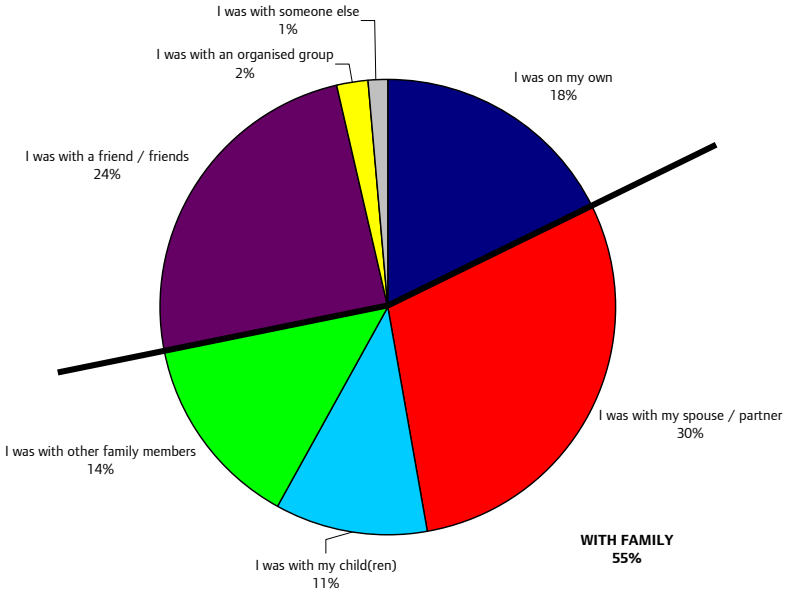


Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

Company

Eighteen per cent of respondents making tourism day visits to London were on trips alone. More than half of respondents (55 per cent) were with one or more members of their family and nearly a quarter (24 per cent) were with friends as shown in Figure 8.

Figure 8: With whom was the respondent on their most recent tourism day visit? (GBDVS-11)

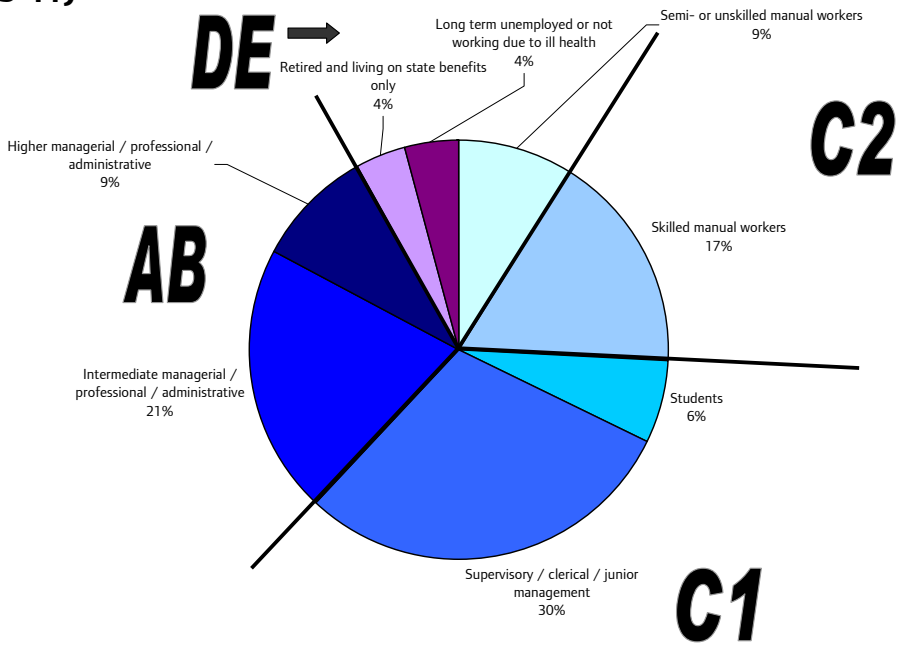


Source: *Great Britain Day Visitor Survey 2011- detailed data and GLA Economics calculations*

Socio-economic background

Obviously, London has tourism day visitors from across all social classes. However, 36 per cent of London's tourism day visitors are classified as the C1 segment as shown in Figure 9. Nevertheless, the C1 segment has a lower spend per visit (£30.70) than any other socio-economic category[15].

Figure 9: Tourism day visitors to London by socio-economic broad group (GBDVS-11)

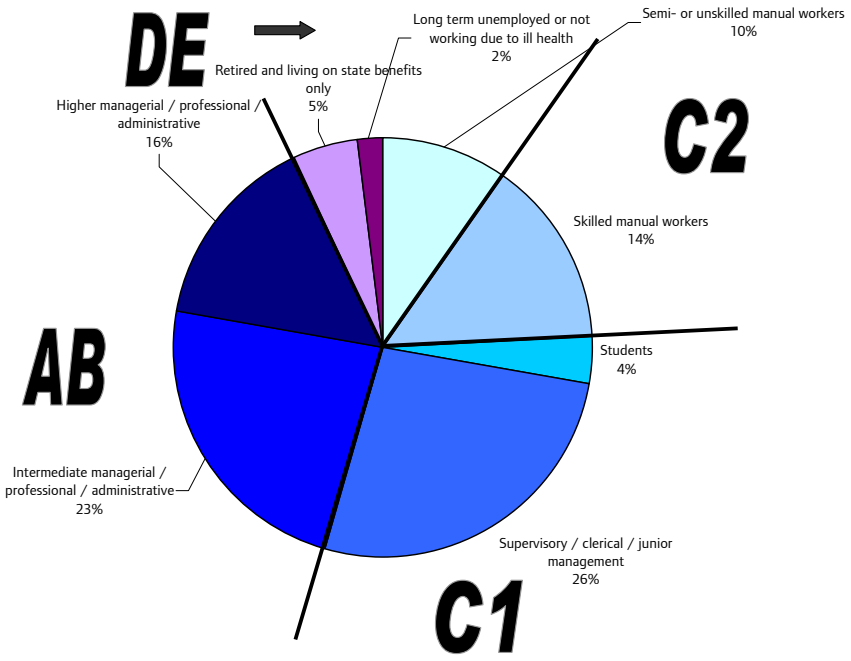


Source: *Great Britain Day Visitor Survey 2011- detailed data and GLA Economics calculations*

According to the GBDVS-11 survey (and unsurprisingly), the AB segment had the highest spend per visit (£47.90) and therefore accounts for the single greatest share of expenditure (39 per cent) as shown in Figure 10.

[15] The socio-economic background is an important factor since it can have a large impact on the income band of respondents. For example, in the LDA Omnibus Survey average spend per visit was £37.28 for those with incomes up to £11,4999, £99.13 for those with incomes between £11,500 and £24,999 and £118.20 for those with incomes of £25,000 or more.

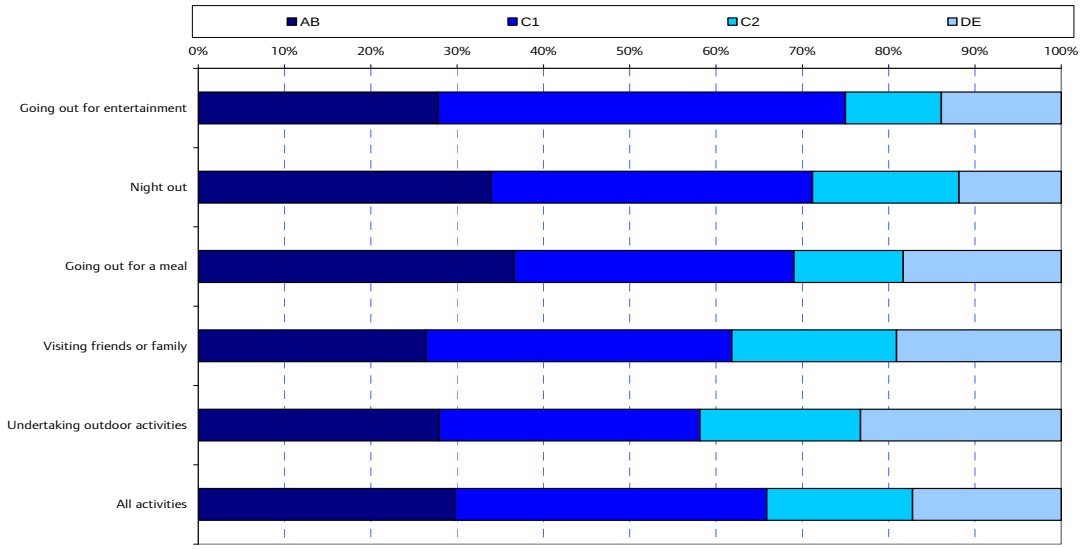
Figure 10: Tourism day visitor expenditure by socio-economic broad group (GBDVS-11)



Source: *Great Britain Day Visitor Survey 2011- detailed data and GLA Economics calculations*

There were minor differences between activities in terms of the share of day visits accounted for by different socio-economic groups with lower costs activities such as 'undertaking outdoor activities' and visiting friends or family having a higher representation from the DE group as shown in Figure 11. This would be further exaggerated in an analysis by spend.

Figure 11: Share of visits by SEGs by main activity (with large respondent bases) in London (percentages)



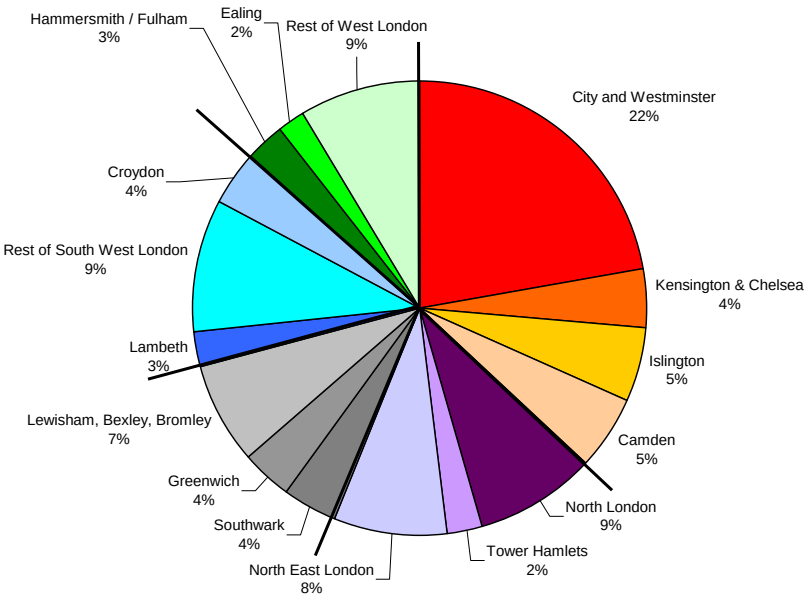
Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Geographical splits within Greater London

A number of important data considerations need to be kept in mind when looking at geographical distributions within London. Firstly, a proportion – of the order of 5 per cent – of day visitors were unable to identify which Borough they had visited. These responses have been excluded from the following analysis and therefore the sum of all Boroughs in actual number terms does not equal the total aggregate. Furthermore, respondents were taken at their word. One consequence of this seems to have been to make the City of London the most 'day visited' authority in the country. This seems unlikely and it is possible that day visitors to areas such as Westminster may well have believed that they had actually visited 'the City'. For this reason, for the purposes of this analysis, the City and Westminster have been aggregated together although some other Boroughs such as Southwark may also have been affected by potential misreporting.

Figure 12 shows the distribution of tourism day visitors within Greater London according to the GBDVS-11[16]. Smaller Boroughs have been aggregated and colour coded into broader sub-regions (not necessarily consistent with sub-regions of the London Plan[17]). The central area has been shaded red / orange; north and northeast London in purples; southeast London in greys; south and southwest London in blues and West London in greens.

Figure 12: London tourism day visits by geographical destination, GBDVS-11



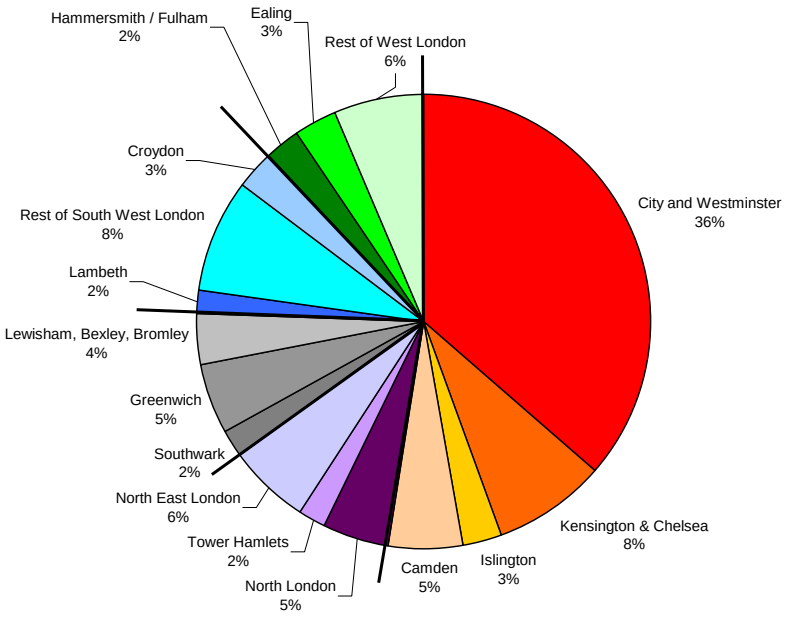
Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*[18]

[16] Note that visitor number estimates were not produced for the 2008 and 2009 runs.
[17] The analysis has also been reworked in Appendix 2-A on the basis of the five London Plan sub-regions. Note here that these are the sub-regions which came into effect following the new London Plan in 2009.
[18] For comparison purposes, Figure A2-1 in Appendix 2 shows that same distribution on the basis of the last run of the Local Area Tourism Impact (LATI) model for which visitor numbers were estimated for

It can be seen from Figure 12 that around 36 per cent of visits are accounted for by the central area (City, Westminster, Kensington & Chelsea, Islington and Camden).

The same approach has been used to look at spend. Figure 13 shows that in terms of spend, it is far more weighted than visitor numbers towards the central area when compared with previous estimates – accounting for 52 per cent of total spend according to GBDVS-11. It seems likely that spend in Southwark and Lambeth may also have been underestimated by the survey[19]. The same logic applies here as in the City of Westminster. People visiting the London Bridge area on the south side of the river or the South Bank Centre area adjacent to Waterloo station may well have believed themselves to have visited the City of London.

Figure 13: London tourism day visitor spend by geographical destination, GBDVS-11



Source: *Great Britain Day Visitor Survey 2011, GLA Economics calculations*

2007. Definitions used for aggregations into larger areas for Figures 13, 14, A2-1 and A2-2 (in Appendix 2):
City and Westminster: City of London; City of Westminster
North London: Barnet; Enfield; Haringey; Hackney
Northeast London: Barking & Dagenham; Havering; Newham; Redbridge; Waltham Forest - for which no estimates for tourism day visitor numbers or spend were available for GBDVS-11 on account of sample size falling beneath 30. For the purposes of this aggregation Waltham Forest has been modelled using leisure day visits of three hours or more (which is available for the Borough) multiplied by the London ratio between tourism day visits and leisure day visits of three hours or more.
Rest of Southwest London: Kingston; Merton; Richmond; Sutton; Wandsworth
Rest of West London: Brent; Harrow; Hillingdon; Hounslow
[19] Note that whilst this has a small impact on this geographical analysis, it will not on the London Plan-based analysis in Appendix 2-A.

Appendix 2 provides figures for both Borough level spend and number of visits and flag up small samples where applicable. Some Borough (and even 'aggregated Borough') sample sizes are relatively small[20] but there is a clear variation in spend per visit from Boroughs in which spend is high such as Kensington & Chelsea (£69.80) and City & Westminster (£58.70) and perhaps more surprisingly, Ealing (£62.90) and Greenwich (£51.70) to Boroughs in which spend is low - including much of Southeast London and North London. Again, perhaps surprisingly – and possibly as a result of misidentification of Borough – Southwark (£17.70) and Islington (£19.20) are amongst these.

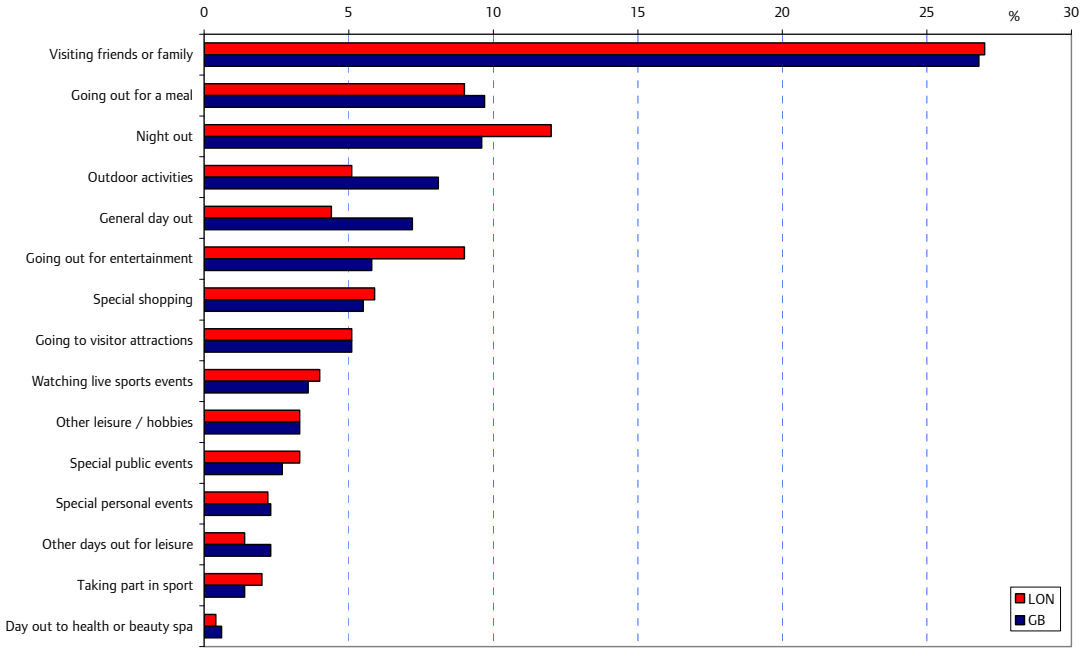
[20] Boroughs with a sample of less than 50 responding are flagged in grey in the national report appendices.

Activities undertaken on visits to London

Figure 14 shows the **main** activities for tourism day visits to London and for all tourism day visits in Great Britain. London is surprisingly similar to the country as a whole (at least under the categories defined) in terms of main activity undertaken during a tourism day visit. Visiting friends or family is the most cited reason for making a tourism day trip in London as it is for the rest of the country. However, there are one or two notable differences:

- Visits to London are more likely than elsewhere to be focused around a 'night out' or entertainment.
- Conversely, visits to London are less likely to be centred around outdoor activities or a 'general day out'.

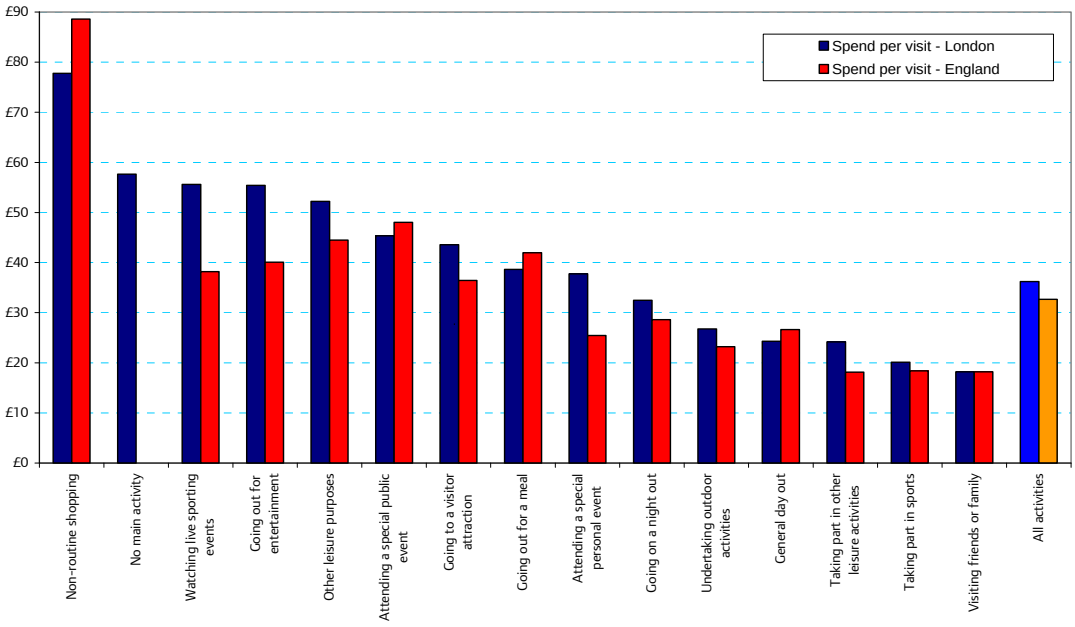
Figure 14: Main activity undertaken on tourism day visits to London and to Great Britain as a whole (percentages)



Source: *Great Britain Day Visitor Survey 2011, GLA Economics*

As would be expected average spend varied by activity (as shown in Figure 15). Note that a small number of activities did not have a large enough sample in the capital to yield a statistically meaningful average spend. Non-routine shopping had the highest spend per tourism day visit. As might have been anticipated, visiting friends and family had the lowest spend per visit. London tended to be more expensive for most activities. There were exceptions though such as non-routine shopping and going out for a meal.

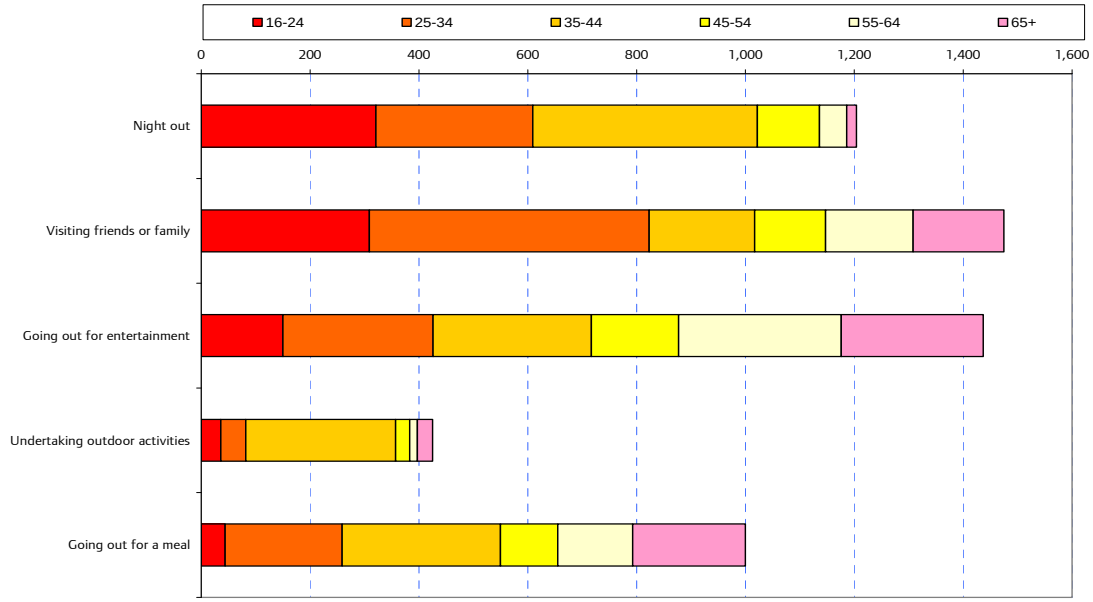
Figure 15: Average spend in London by tourism day visitor activity compared to England (£)



Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Spend in some activities such as 'going out for entertainment' was fairly evenly spread across age groups. However, in some other activities such as 'undertaking outdoor activities' it was highly concentrated amongst particular age cohorts (in this particular case the 35-44 cohort) and shown in Figure 16.

Figure 16: Total spend on selected activities (with large respondent bases) in London by age cohort (£ million)

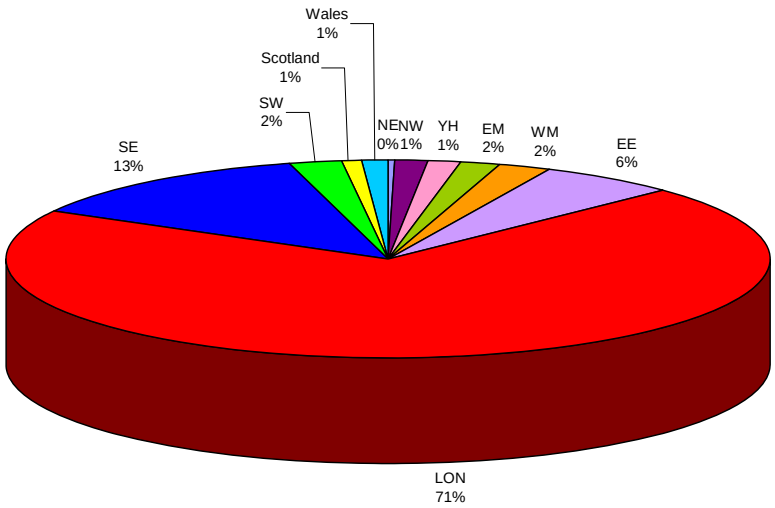


Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Regional origin of tourism day visitors to London[21]

Figure 17 shows that in the GBDVS-11 tourism day visitors to London are overwhelmingly from Greater London itself. This is linked to the definition used since it only requires them to cross out of a Borough for three hours. More than seven out of ten of all tourism day visitors are from London, 13 per cent from the South East, 6 per cent from the East of England, 8 per cent from the other English regions and 1 per cent each from Scotland and Wales.

Figure 17: Regional origin of tourism day visitors to London in GBDVS-11 (percentages)

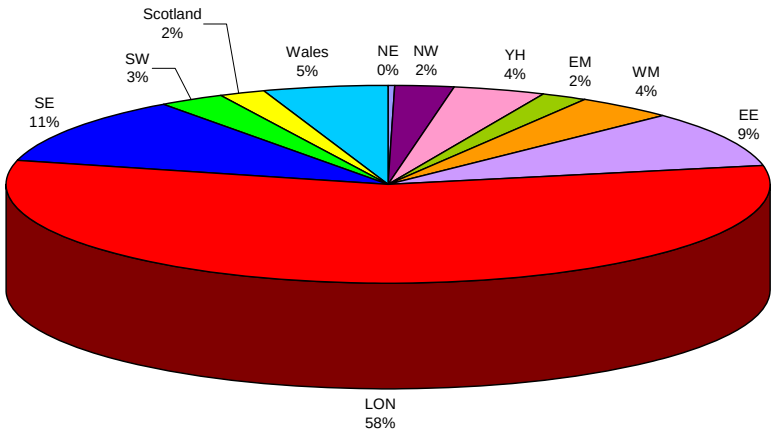


Source: *Great Britain Day Visitor Survey 2011, GLA Economics*

Partly on account of the fact that travel costs are included within expenditure, tourism day visitors from further away had a higher spend per visit, therefore when examined on a 'share of expenditure' basis, the picture is substantially different as shown in Figure 18.

[21] A comparison of the respondent composition from the Omnibus Survey of 2008 is presented in Appendix 2.

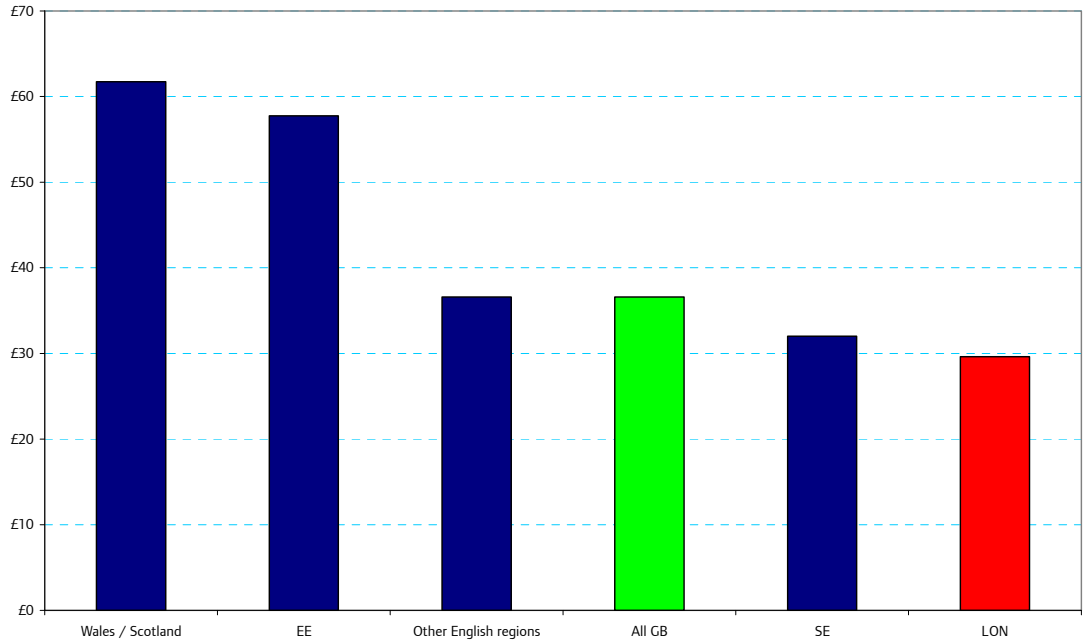
Figure 18: Share of expenditure in London in GBDVS-11 by region of origin (percentages)



Source: *Great Britain Day Visitor Survey 2011- detailed data, GLA Economics*

Average spend per trip was weighed down by London (£29.60) and the South East (£32.00). Spends in other English regions were higher but based upon smaller sample sizes. Aggregated data are shown in Figure 19. Clearly, day visits involving longer journeys tend to incur higher spending. Unsurprisingly, travel-related costs from Wales and Scotland were markedly higher than from within Greater London or the South East.

Figure 19: Spend per trip by region of origin in GBDVS-11 (£)

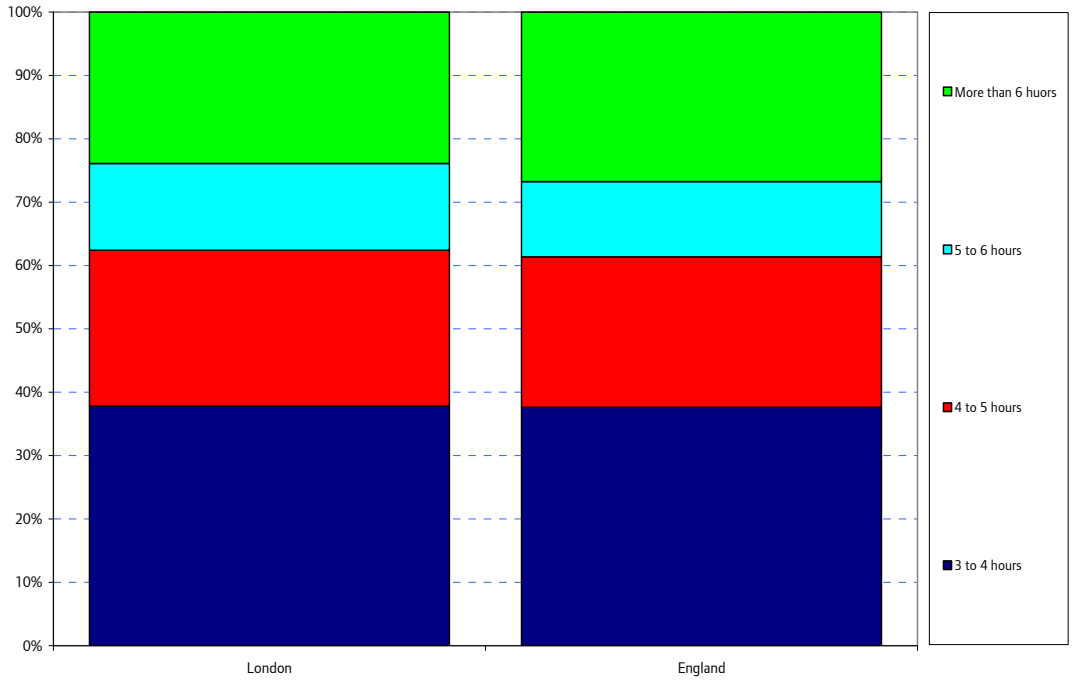


Source: *Great Britain Day Visitor Survey 2011- detailed data, GLA Economics*

Duration of tourism day visits to London

Bearing in mind that the duration of a visit includes the time spent travelling to the destination, Figure 20 shows that there is relatively limited difference between London and England as a whole in terms of the composition of durations. However, it might seem that visits of six hours or more account for a slightly lower proportion of visits in the capital. Sixty two per cent of tourism day visits are between three and five hours with only 24 per cent exceeding six hours.

Figure 20: Duration of tourism day visits in London and England (percentages)

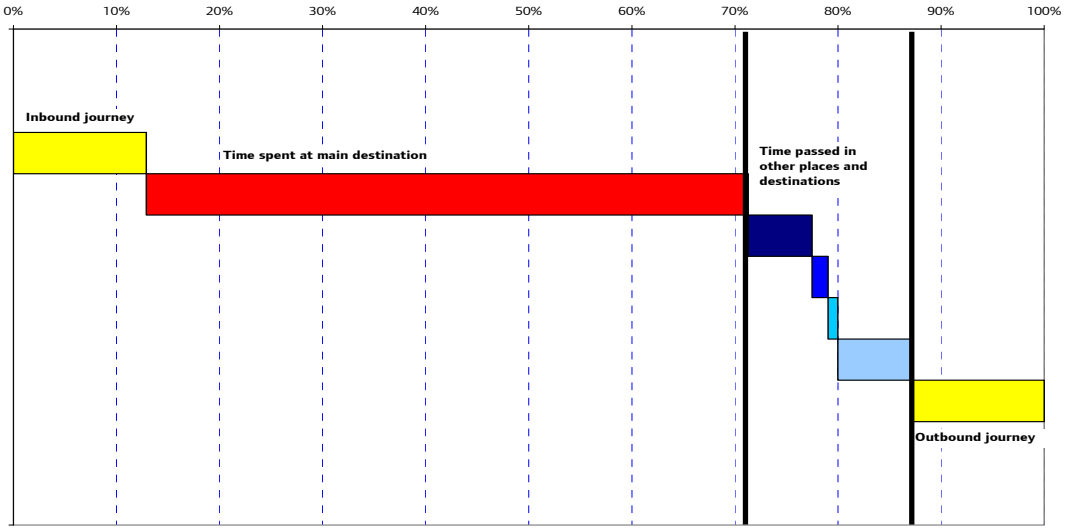


Source: *Great Britain Day Visitor Survey 2011, GLA Economics*

The average duration of a trip did vary by the main activity undertaken in Greater London with attending special personal events having the highest average duration – but very closely followed by some other activities. Taking part in sports and non-routine shopping had the shortest average durations.

An average tourism day visit across all activities in London was 5 hours and 21 minutes. Of this only 3 hours and 8 minutes was spent at the main place visited, 1 hour and 23 minutes was spent travelling and 50 minutes was spent elsewhere. This is shown graphically in Figure 21. Table 5 shows the variation in mean duration by different main activity undertaken in the capital.

Figure 21: Mean time spent travelling and at destinations (per cent of average duration)[22]



Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

Table 5: Average duration of tourism day visit by main activity in London

	Calculated reported duration (hrs and mins)
Other leisure purposes	6 hrs 09 mins
No one main purpose	6 hrs 02 mins
Going to special personal events	5 hrs 52 mins
Going to visitor attractions	5 hrs 52 mins
Visiting friends or family	5 hrs 45 mins
Taking part in other leisure activities	5 hrs 38 mins
General day out	5 hrs 18 mins
Going to special public events	5 hrs 15 mins
Going out for entertainment	5 hrs 15 mins
Watching live sporting events	5 hrs 13 mins
Going on a night out	4 hrs 55 mins
Going out for a meal	4 hrs 50 mins
Undertaking outdoor activities	4 hrs 44 mins
Taking part in sports	4 hrs 44 mins
Non-routine shopping	4 hrs 24 mins
All tourism day visits to Greater London	5 hrs 21 mins

Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*[23]

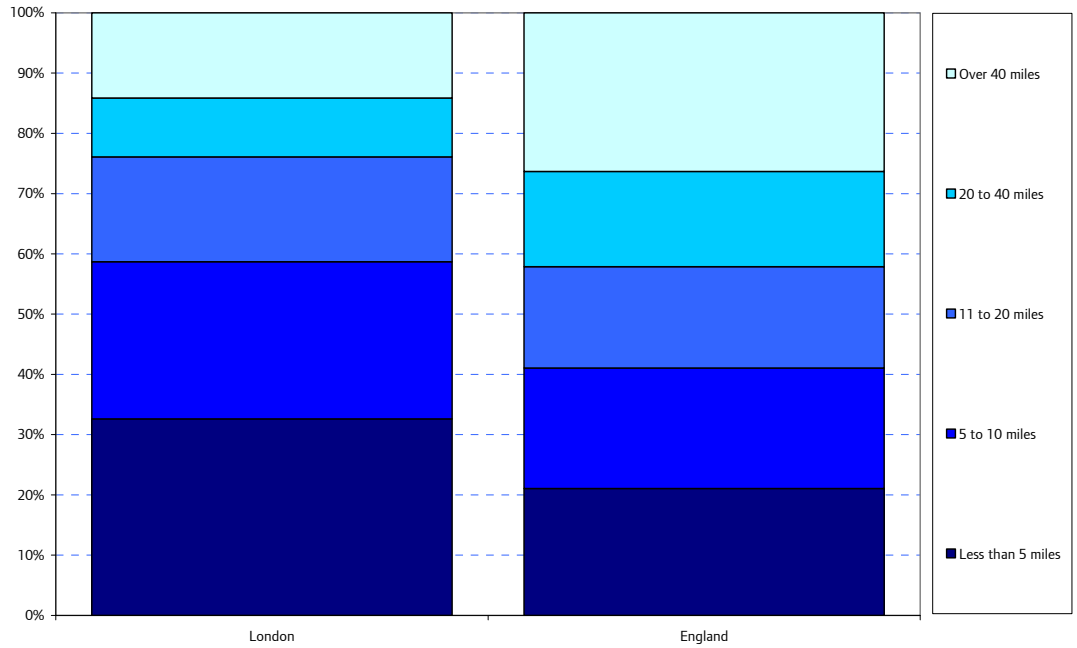
[22] Note here that in the survey 'time passed in other places and destinations' was further disaggregated. Hence the blue section being broken into four.
[23] This is a calculated value. GLA Economics has taken midpoints of bands as follows: three hours to four hours (3.5); four hours to five hours (4.5); five hours to six hours (5.5) and over six hours (9.0). This methodology was developed in collaboration with TNS Research, particularly with regard to the assumed 9 hour top category. All figures were based purely on respondents' answers.

Distanced travelled on tourism day visits

The results for London are critically dependent on the definition of a tourism day trip and the 'London orientation' of those included as day visitors to the capital in the survey. As might be expected in a dense urban area, many trips were over a relatively short distance when compared with the rest of the country, lowering the mean distance for trips to the capital. Note here that a proportion of journeys were of unknown length. This proportion (both in the case of London and that of England) has been removed in this analysis and therefore it is not directly comparable with the national report.

One third (33 per cent) of journeys were of less than 5 miles. This compares with a little over a fifth (21 per cent) across England as a whole. Furthermore, a further 26 per cent of London tourism day visits were between five and ten miles as shown in Figure 22.

Figure 22: Length of journey on tourism day visits to London and England (percentages)[24]



Source: *Great Britain Day Visitor Survey 2011, GLA Economics*

Only 14 per cent of journeys in London were identified as being over 40 miles and half of those had travelled over 100 miles. Again, the regional composition of those undertaking tourism day trips to London needs to be considered.

Overall average reported journey distance was 29 miles[25]. This was significantly lower than for England as a whole (41 miles) which was weighed up by some regions such as

[24] Note here that these are 'reported' distances. TNS and the commissioning organisations of the survey did some work looking at claimed distance travelled and actual distance travelled based on town visited and town of origin. Interestingly that seems to have resulted in a higher average trip length. Respondents were asked to categorise the distance they travelled into a bracketed range.

the South East and the South West – the latter of these having the highest claimed average distance travelled at 54 miles. Within London, there was considerable variation between different types of activities as shown in Table 6.

Table 6: Average reported journey distances for tourism day visits to London

	Calculated reported distance (mean - rounded)
Other leisure purposes	58 miles
Taking part in sports	52 miles
Watching live sports events	50 miles
Going to visitor attractions	45 miles
General day out	41 miles
No one main purpose	37 miles
Going to special public events	34 miles
Going out for entertainment	32 miles
Visiting friends or family	31 miles
Going to special personal events	30 miles
Taking part in other leisure activities	28 miles
Undertaking outdoor leisure activities	20 miles
Going out for a meal	19 miles
Non-routine shopping	15 miles
Going for a night out	14 miles
All tourism day visits to Greater London	**29 miles**

Source: *Great Britain Day Visitor Survey 2011 – detailed data and GLA Economics calculations*

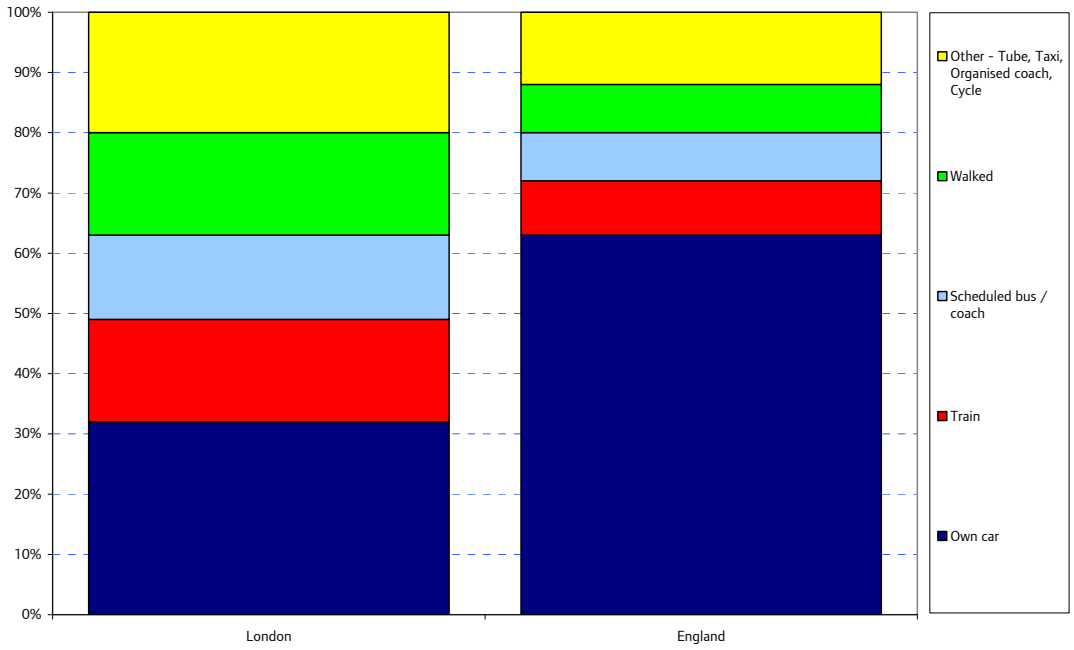
In many cases, in spite of the generally lower actual values, London's distances reflected the broad patterns seen nationally[26], where 'going on a night out' was the shortest distance at 17 miles, followed by, 'going out for a meal' (28 miles) and 'non-routine shopping' (32 miles). Note, however, that this last figure is more than twice the claimed distance of that recorded for tourism day visits to the capital. At the other end of the scale, 'other leisure purposes' was also the greatest average distance nationally at 67 miles. However, 'taking part in sports' was actually a shorter distance nationally than in London at 47 miles. The same was also true for 'watching live sports events' (also 47 miles nationally).

[25] This is a calculated value. TNS recorded values as the midpoints of bands as follows: less than five miles (2/5); between five and ten miles (7.5); 11 to 20 miles (15); 21 to 40 miles (30); 41 to 60 miles (70); 61 to 80 miles (70); 81 to 100 miles (90); over 100 miles (210). All figures were based purely on respondents' answers and approximately 8 per cent of the sample claimed that they did not know.
[26] Figures quoted here are for Great Britain.

Mode of transport to destination

As might be expected, the profile of modes of transport used to access London as tourism day trip destination is markedly different from that for England as a whole. Only one third (32 per cent) used their own car compared to twice that share across England as a whole. Perhaps surprisingly at first sight, the share of people walking to their destination in London was the same as the share arriving by train (17 per cent). Note that the yellow segment in Figure 23 includes a variety of modes which form an unhelpfully wide aggregation for London including hired car, taxi, organised coach trip, cycling and the London Underground. Fortunately, the more detailed data provided by TNS Research yields a greater degree of separation between modes within this.

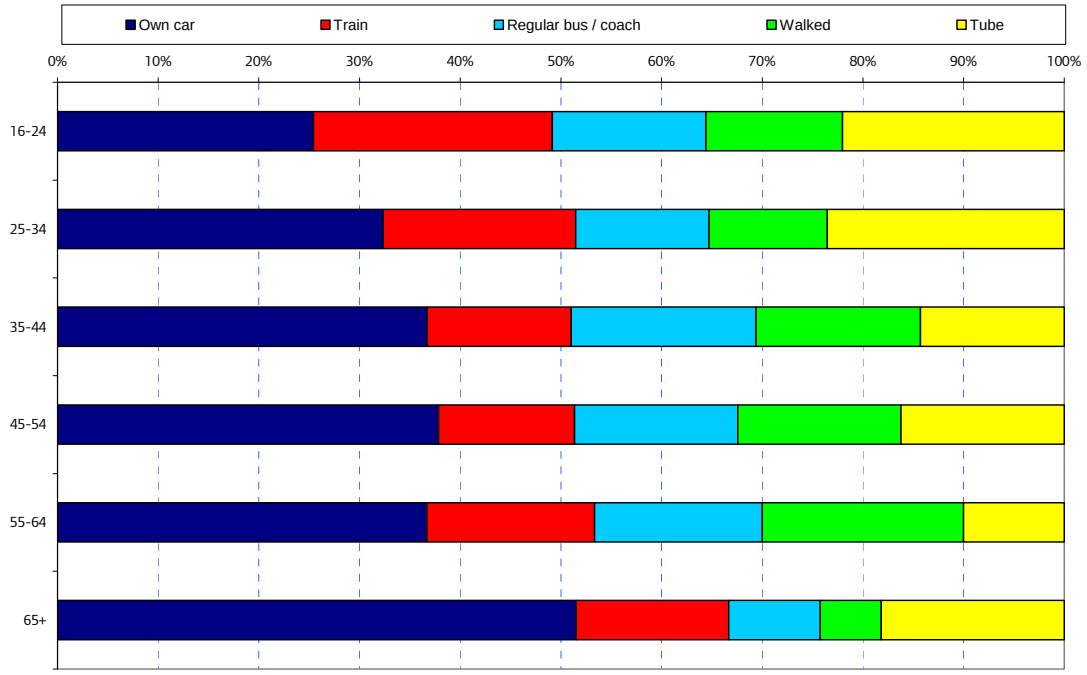
Figure 23: Mode of transport used to arrive on tourism day trips (percentages)



Source: *Great Britain Day Visitor Survey 2011, GLA Economics*

There was some variation in modal use by age cohort. Younger people were less likely to arrive at their destination by car and more likely to use either the train or the London Underground as shown in Figure 24. However, they were not more likely to walk there.

Figure 24: Mode of transport used to arrive on tourism day trips by age cohort (percentages)



Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Unsurprisingly, those who walked to their destination tended to have relatively short journeys. Those who walked to their destination were also more likely to be going there for non-routine shopping or going on a night out than the respondent base as a whole. They were far less likely to be going out for entertainment, watching live sport or going to a visitor attraction.

Car drivers were more likely than the respondent base as a whole to be visiting friends or family. However, there were not huge differences between those who came by car and those who arrived by 'any other mode' (excluding being on foot). Again unsurprisingly, there was a strong, positive relationship between duration of visit and reported journey distance. This was probably due to the simple fact that journey time was considered to be part of the duration of the visit.

Again, there was hardly any difference at all in the duration profiles of those who travelled by car and those who used other modes of transport: 37 per cent of durations were between three and four hours for both and for durations of over six hours there was only one percentage point difference (13 to 14 per cent). For walkers, however, 46 per cent of durations were three to four hours.

Evaluation of tourism day visits to London

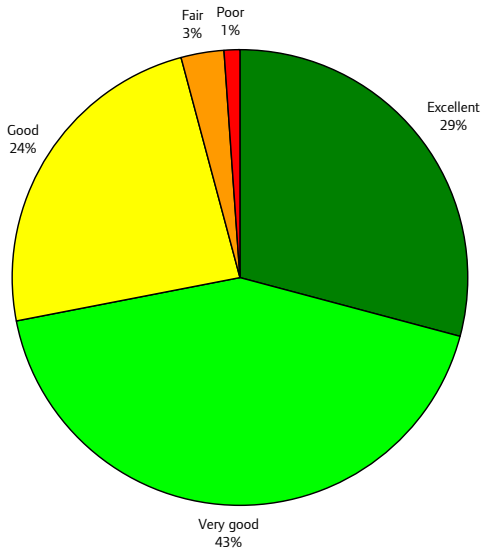
The GBDVS-11 questionnaire also put some questions to respondents regarding the quality of their experience on tourism day visits to London. This section of the questionnaire was routed. Questions about trip satisfaction were only asked about trips involving 'relevant' activities as follows:

- Non-routine shopping;
- Going out for entertainment;
- Undertaking outdoor leisure activities;
- Watching live sports events;
- Going to visitor attractions;
- Going to special public events;
- General days out;
- 'Other' day trips.

Therefore, although the question was asked to some day tourists whose main activity was visiting friends and family, it was not asked to those whose day trip involved **only** visiting friends and family.

The overall results suggest that most tourism day visitors were more than satisfied with their experiences. More than seven out of ten (72 per cent) of tourism day visitors to London rated their experience of their day visit as either 'excellent' or 'very good' and only one in 100 considered it to be 'poor' as shown in Figure 25.

Figure 25: 'How would you rate your overall experience of your destination during your most recent trip / excursion?' (percentages)

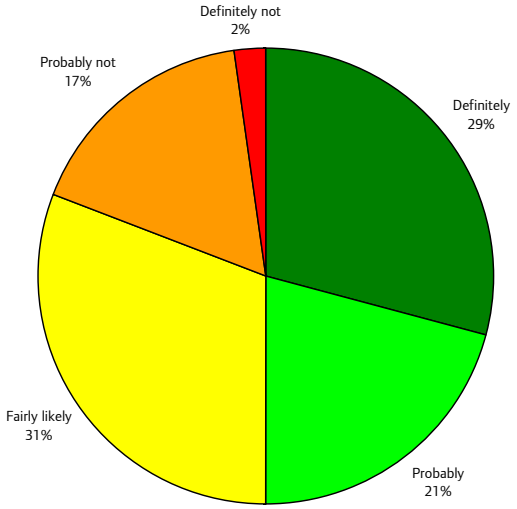


Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Female visitors to London were more likely to describe their visit as 'excellent' (34 per cent) whilst male visitors were more likely to describe theirs as 'very good' (46 per cent). Thirty nine per cent of those in the C2 socio-economic group described their experience as 'excellent' – the highest of any SEG. An analysis of the results on a monthly basis showed variation between months but no clear pattern over the seasons. The highest rating by activity was for 'going to special personal events' whilst the lowest ratings tended to coincide with those activities with the least robust respondent base – but there was not huge variation.

More than eight out of ten respondents (81 per cent) said that they were at least 'fairly likely' to recommend their destination to family or friends as shown by Figure 26.

Figure 26: 'Based on your experiences during this trip, to what extent would you recommend your destination as a destination to friends and family?' (percentages)

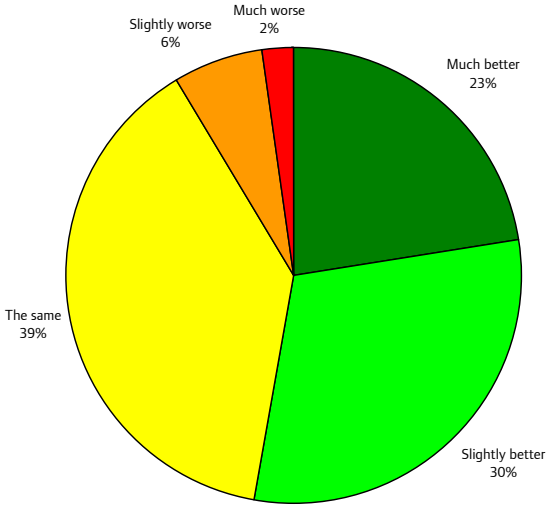


Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

Respondents were also asked to compare their visit destination with other available alternatives in the country (technically, the UK on this question) for the activities they undertook as shown in Figure 27.

Again, the question was open to some degree of interpretation for the activities of some respondents. Hence, of those attending a 'special personal event', 92 per cent said that they rated London 'the same' for that activity when compared to other UK destinations. This presumably indicates that it was the event itself that was important rather than the destination as such.

Figure 27: 'How would you rate your destination compared to other UK destinations for a day trip or excursion to take part in the same activities as your recent visit?' (percentages)



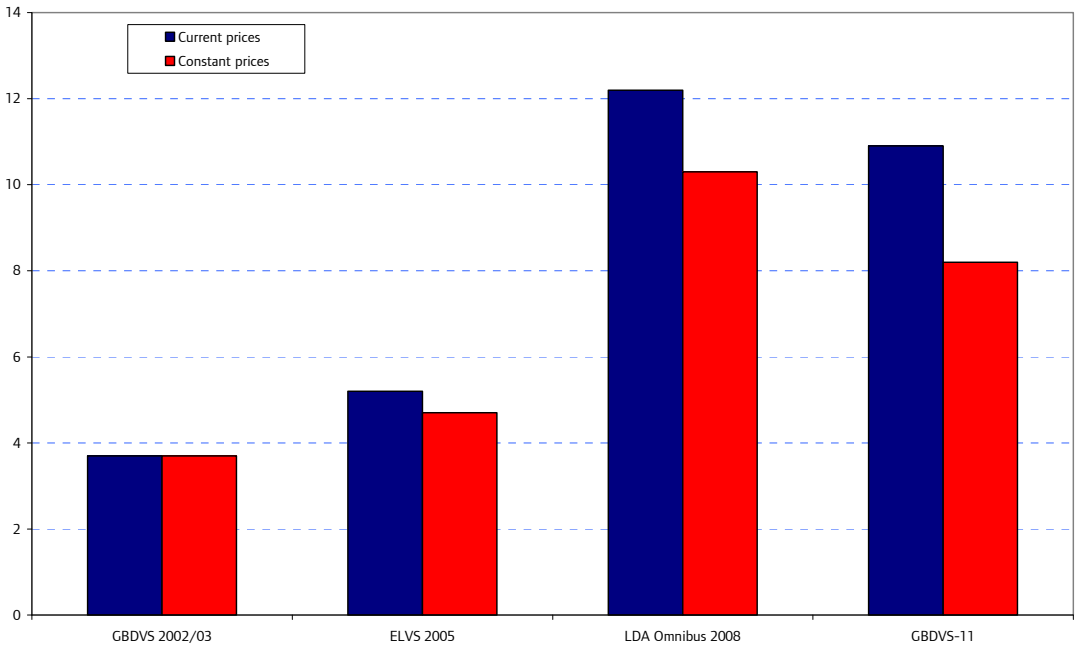
Source: *Great Britain Day Visitor Survey 2011 – detailed data, GLA Economics*

How have day visits changed over time?

Creating any kind of time series for tourism day visitors to the capital is inherently problematic. Different definitions, different means of collating data and divergent phraseologies in questionnaires have all complicated the issue but need to be set aside.

The approach taken here is to use previous surveys – none of which is entirely consistent in methodology – and adjusts average spends by the Retail Prices Index excluding mortgage interest (RPIX). This approach is consistent with the methodology undertaken for analysis of average spend per visit in Current Issues Note 29[27]. Figure 28 shows total spend in each of the four relevant surveys and that spend adjusted for price inflation.

Figure 28: Total spend in current prices and 2002 constant prices (£ billion)



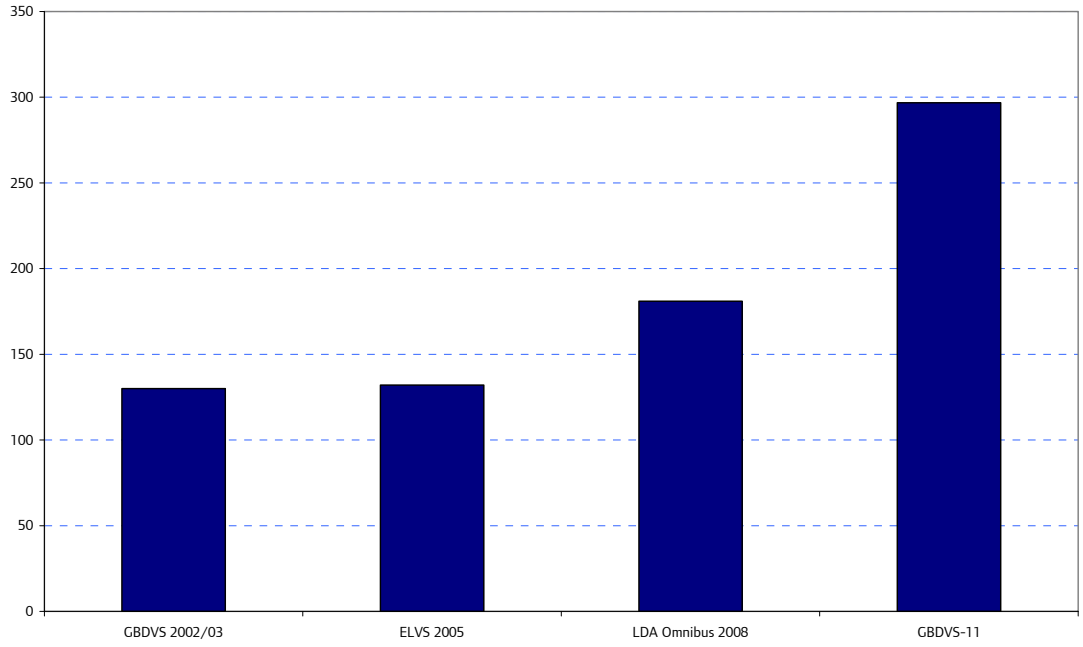
Source: *Great Britain Day Visitor Survey 2002/03, England Leisure Day Visits Survey, LDA Omnibus Survey 2008, Great Britain Day Visitor Survey 2011, ONS, GLA Economics calculations*

It can be seen that, whilst there is some variation, the results from GBDVS-11 and the London Development Agency's Omnibus Survey in 2008 are broadly comparable. Results from the GBDVS in 2002/03 and the England Leisure Visits Survey (ELVS) in 2005 are also comparable with one another. However, the two earlier surveys and two later surveys have produced totally different estimates with regard to total day visitor numbers for London.

[27] Again, see GLA Economics Current Issues Note 29 - *Estimating the contribution of leisure day visitors to London's tourism industry*.

Whilst total spend is similar in the GBDVS-11, there is a very substantial difference in the estimated number of day visitors. Figure 29 shows estimates of day visitor numbers to London according to the four surveys.

Figure 29: Numbers of day visits to London (millions)



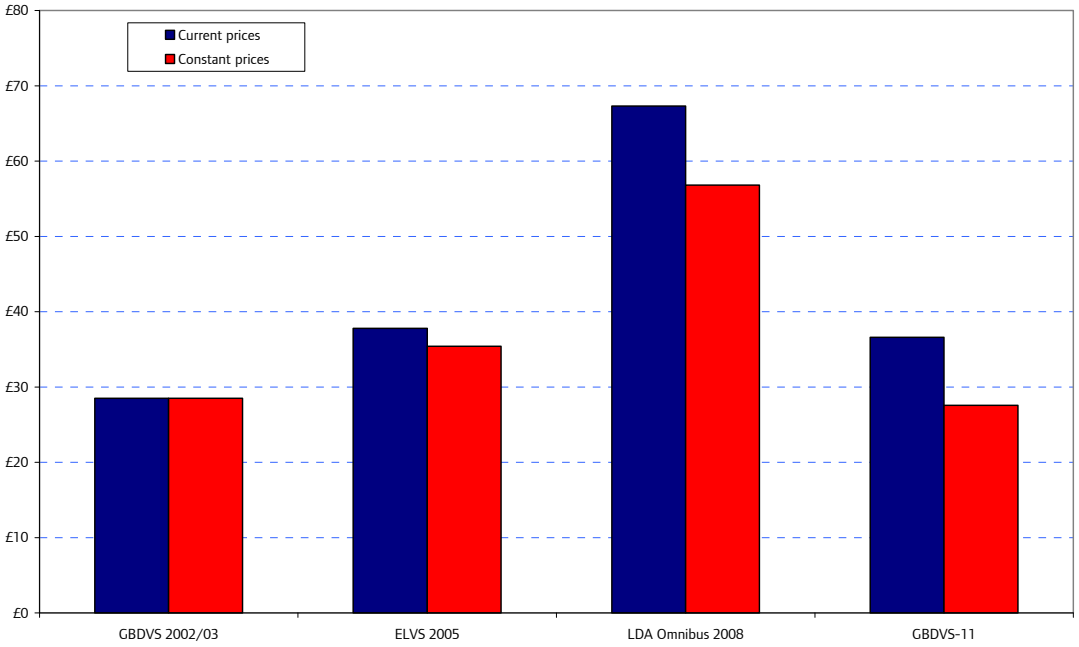
Source: *Great Britain Day Visitor Survey 2002/03, England Leisure Day Visits Survey, LDA Omnibus Survey, Great Britain Day Visitor Survey 2011, ONS, GLA Economics calculations*

It is the number of visits which is clearly very different[28]. Furthermore, it is the GBDVS-11 which stands out as particularly different from previous surveys here.

As a result of these differences in estimated tourism day visitor numbers, when spend per visitor is examined, there is a very marked difference between the Omnibus Survey and GBDVS-11.The Omnibus Survey estimated spend of nearly £12.2 billion from 181 million visits, generating a spend per visit of £67.31. Figure 30 shows average spend per trip in 2002 prices as well as current prices. It should be self-evident that the LDA Omnibus Survey shows a far higher spend per visitor than any of the other surveys. This difference is even more striking when one considers that the GBDVS-11 effectively has an additional filter on it removing most of those not outside their home environment.

[28] Note here that the Omnibus Survey defined a tourism day visit as anything of at least three hours duration and not done on a regular basis. Therefore, it was actually missing the additional filter present in the GBDVS-11 of being away from home (or, in Greater London, of being outside the Borough).

Figure 30: Average spend per visitor in current and 2002 constant prices (£)



Source: *Great Britain Day Visitor Survey 2002/03, England Leisure Day Visits Survey, LDA Omnibus Survey 2008, Great Britain Day Visitor Survey 2011, ONS, GLA Economics calculations*

On the surface, average spend per visitor (like total day visitor numbers) shows a remarkable degree of consistency between the two Great Britain Day Visitor Surveys. However, there were important changes in the methodology including the extra filter of generally having had to be outside the home environment in the GBDVS-11 and that the similar average spend per visitor figures have been generated from widely divergent estimates of visitor numbers. It is also worth bearing in mind that 2011 was a year of relatively low GDP growth following the recession of 2008/09 and in which austerity budgets were squeezing spend. Therefore we might speculate that average spend per head might have been higher a few years previously. However, there may also be some degree of substitution effect for longer holidays abroad which may have been affected by unfavourable sterling exchange rates. Even allowing some weight for the above, the results derived from the LDA Omnibus Survey would now appear to be an outlier.

Issues raised by the survey

One of the big issues surrounding day visitor estimates is the definition used. On the one hand, a third of all trips in London were less than five miles which indicates that a significant number of journeys were not truly outside the local area but rather just across a Borough boundary. Furthermore certain activities did not even have to cross outside the Borough. This raises the question of whether watching a match on the widescreen television at a local pub genuinely constitutes 'tourism' or just constitutes part of local life? There can be no doubt that this is one of the reasons why London's average distance travelled is so much lower in the survey when compared to the country as a whole. Furthermore, this is a specifically 'London' problem as well since Greater London is the only part of the country in the survey where the 'Borough definition' of being outside the home environment has been applied.

Conversely, any true measure of the scale of day tourism ought really to include business day tourism which is not captured in any way by the survey. It seems likely that spend amongst those on business day trips might be higher than amongst leisure day visitors. London & Partners is reviewing all its surveys and it is possible that in future it will be easier to get some idea of how many business tourists are attending major events such as conferences on a day basis and what their spend is. However, most business trips will continue unmonitored. The relative importance of leisure day tourism and business day tourism remains difficult to establish. Nevertheless, it stands to reason that business day tourism visits to the capital must be significant in terms of both visitor numbers and spend.

The average spend in London for tourism day visits of under £37 seems especially low and it seems likely that this has been weighed down by especially short day trips in the capital.

It needs to be kept in mind that 2011 was the establishment survey for this year and that it is not on the same basis as the previous GBDVS back in 2002/03. The current methodology is also the one which is in field at the present time for the 2012 GBDVS. This at least provides the baseline from which future trends can be analysed. The importance of the changed methodology is emphasised by the divergent results obtained in parallel face-to-face interviewing waves. The online survey seemed to record more trips and it is not entirely clear whether this reflects a greater tendency for online users to respond or simply the fact that online users are more likely to be active and therefore take more tourism day visits[29]. Adjusting for this would make the numbers

[29] An analysis of the mode effect (the way in which people respond differently to different types of survey) and sample effects is included in the GBDVS Methods and Performance Report, available online. A third fewer day trips were of three hours or more were recorded using more traditional face-to-face interviewing. There are multiple possibilities as to why this could be the case. For example, it could be that an individual respondent feels more pressured to conclude the survey when an interviewer is there (or even that the interviewer hurries the respondent). Under that scenario that might indicate that the online methodology was likely to be more accurate. Following a review it has been concluded that that majority of the discrepancy is likely to be a mode effect rather than related to sample profile.

of day visitors recorded by GBDVS-11 more similar to the result obtained by the LDA Omnibus Survey. There were also more subtle shifts (such as the change of wording from 'regularly' to 'very regularly') which may also have had some impact.

Nevertheless, there are certain issues with the data for London which are not replicated in any other city and these probably reflect at least to some extent in the high proportion of day visits relative to population. In previous surveys any trip for leisure purposes which lasted over three hours was defined as a tourism day visit. That meant that the visit could be undertaken within the same London Borough. However the fact that this filter has not been utilised the same way outside Greater London and that some activities (such as visiting a visitor attraction) have been excluded from that filter certainly impacts differentially upon the capital.

Another issue which may be considerably more important in London than elsewhere is whether transport spend has been captured fully by the survey. London has some specific factors here including the Oystercard system and a relatively high proportion of in-commuters (whether resident inside or outside Greater London). The analysis of modal usage on tourism day visits shows how different it is from the rest of the country in terms of public versus private transport.

There are further small issues which have been flagged up during the course of this analysis. For example, it is theoretically possible to start a day visit from holiday accommodation (4 per cent of day visits and 8 per cent of expenditure). However, if the survey has unintentionally captured visitors who should have been categorised as on domestic overnight tourism, then this will lead to some double counting. If we return to the conceptualisations behind GLA Economics' own LATI model, it is obvious why this is the case. A tourist can fall into one of three categories as follows:

1. an international visitor (all assumed to be overnight stayers although it is accepted that an international day visit from Paris or Brussels or, indeed, many other international cities by air, is possible);
2. a domestic overnight visitor;
3. a day visitor.

The total spend of visitors to London is calculated as the sum of the spends of each of these three groupings and no overlaps between the groups can exist.

Whilst the survey has not confirmed the experimental estimates of visitor numbers and average spend obtained from the LDA's own Omnibus Survey questions, the GBDVS-11 has confirmed the broad value of tourism day visits to London relative to other tourism spend. It seems that tourism day visitor spend is at least of the order of total overseas visitor spend and, conceivably, of the order of overseas tourism expenditure and overnight domestic spend put together.

Conclusions

Information on day visitors has always been the weakest link in the understanding of the capital's tourism industry. For reasons of the definition of what a 'day visitor' actually is it remains so. However, the establishment of the GBDVS on a consistent basis – at least for a couple of years and, hopefully, beyond that – is, potentially, a major step forward.

The first conclusion is that some of the people visiting London are not even aware that they are within 'London' as defined by the Greater London boundary. Once adjusted to this boundary spend from tourism day visitors in London is approaching £10.9 billion. London accounts for more than a fifth of tourism day visitor spend across Great Britain as a whole – far more than its population share.

£36.60 as an average spend on day visits to London seems relatively low and is certainly considerably lower than the average spend indicated by the Omnibus Survey in 2008. It is only around 12 per cent above average spend across England as a whole. However, the figure should not be taken entirely at face value. Nearly one in four day visitors claimed to have spent nothing on their visit, raising the average spend of those who did.

More research is probably required into the behaviour of high spenders on day visits. The 'over £50' category is critical as it is clear that some people falling into this category are spending far more. Having that as the top category in an analysis may be particularly inappropriate for those purchasing items on non-routine shopping and (in London) for those buying tickets to expensive sporting events.

The clear focus of spend is on Central London – whether that is defined as the core area or the slightly wider definition used by the London Plan sub-region and shown in Appendix 2-A.

Visiting friends and family is by far the most frequently cited activity for tourism day visits undertaken in Greater London. It is unclear how much influence London stakeholders could exert upon such visits. Indeed, it is not clear that their activities would be best focused on such visits since 'visiting friends and family' has the lowest spend per visit of any activity. [That is not to say that it is unimportant in spend terms, particularly amongst the under 35 years of age cohorts as shown in Figure 17. Indeed, it has a higher total spend than any other activity.] In London, it is non-routine shopping spend that has the highest spend per visit.

The GBDVS-11 has reiterated that the most important source for tourism day visitors to London is Greater London itself. Seventy one per cent of visits to the capital start from within the capital itself and those Londoners account for 58 per cent of spend. [Furthermore some of the higher spend from other regions is accounted for by greater travel expenses in getting to the capital.] Consequently, there is also a different pattern of reported distance travelled to London than to elsewhere. One caveat here is that

work by TNS Research and Visit England has suggested that respondent estimates of distances travelled were not very accurate and it seems intuitive that the tendency to misjudge travelled distance will likely be greater amongst those travelling by public transport. Visitors to London were much less likely to be travelling by private car – especially amongst younger age groups.

Again, with the composition of durations, it would be useful to have a clearer idea of the behaviour of those in the '6 hours +' category. The average trip duration amongst this group was considered to be nine hours. Interestingly, some of the higher spend activities (especially non-routine shopping) were the ones which were relatively short in duration as well.

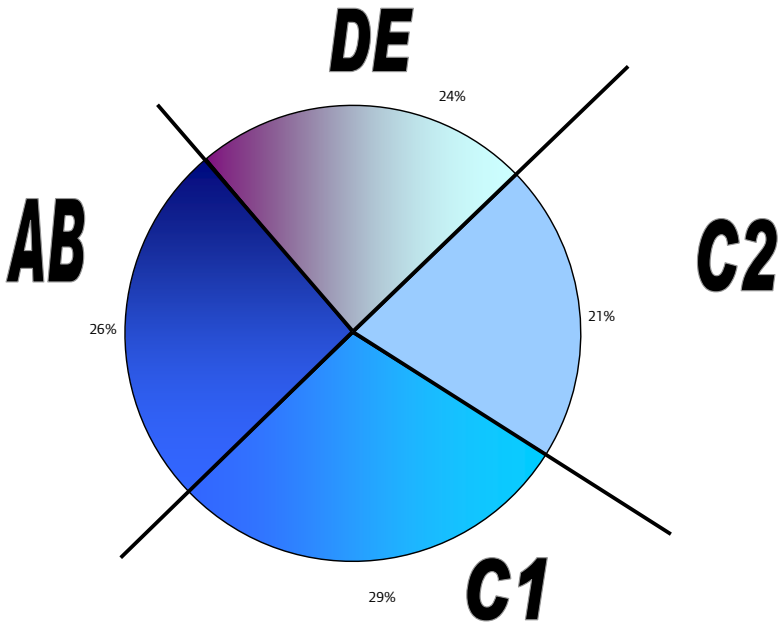
It stills remains very difficult, given changes in definitions, mode effects and other changes to questionnaires, to create any kind of meaningful time series for either day visitor numbers or day visitor spend. With average spend per visit depending on these two inputs, this has also been very variable. The key is perhaps not to look at average spend in aggregate but, rather, to focus upon spend in different activities.

Appendix 1: Comparison of socio-occupational respondent base in GBDVS-11 to the 2008 LDA Omnibus Survey

This appendix details the socio-occupational base of the LDA Omnibus Survey in 2008. Given the very substantial difference between the figure found for average spend per visit in GBDVS-11 and that from the LDA Omnibus Survey of 2008, it was speculated that differences in the socio-economic statuses of respondents could have been a key driver. The respondent base in GBDVS-11 was shown by socio-occupation grouping in Figure 9.

Figure A1-1 shows the proportion of the respondent base in the Omnibus Survey by broad socio-economic group for comparison purposes. Note here that the individual occupational categories behind the socio-occupational classes cannot be seen in Ipsos MORI's Capibus printout. Therefore only skilled manual workers are directly comparable at this level.

Figure A1-1: Tourism day visitors to London by socio-economic broad group (Omnibus Survey 2008)

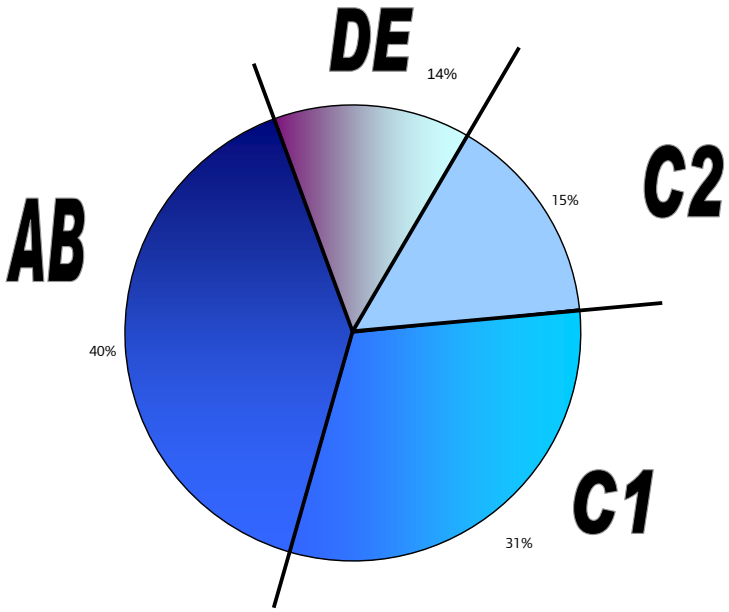


Source: *Ipsos Mori LDA Omnibus Survey 2008 and GLA Economics calculations*

It should be noted that there is only slight variation when compared with the GBDVS-11 respondent base and this is not in the direction which would be expected to raise average spend per head. There is a slightly lower share of respondents in AB and C1 and correspondingly higher shares in the C2 and DE categories.

However, when the spend pattern is examined it is almost identical to that of the GBDVS-11 as shown in Figure A1-2. (See Figure 10 for the GBDVS-11 equivalent.)

Figure A1-2: Tourism day visitor expenditure by socio-economic broad group (Omnibus Survey 2008)



Source: *Ipsos Mori LDA Omnibus Survey 2008 and GLA Economics calculations*

Therefore it is extremely unlikely that the socio-economic characteristics of the Omnibus respondent base were responsible for driving a higher spend per tourism day visitor than that of the GBDVS-11.

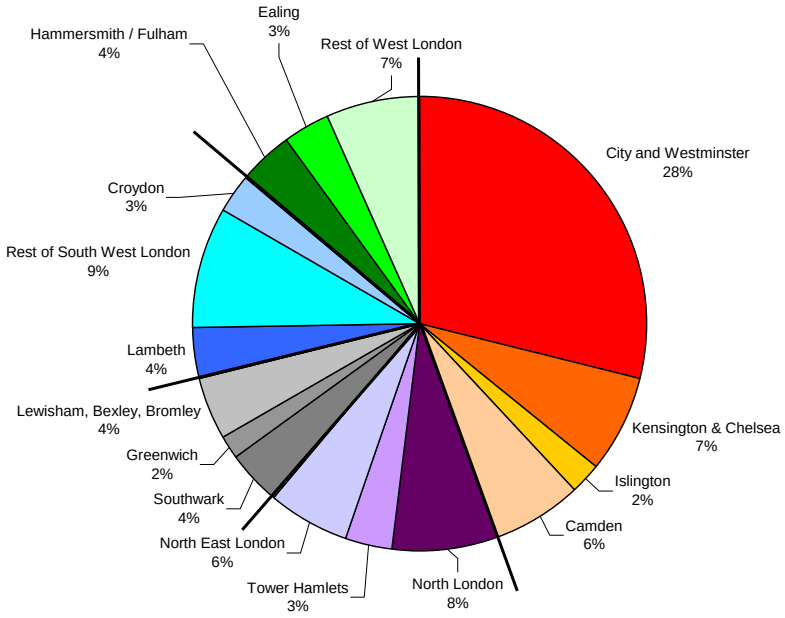
Appendix 2: Comparison of geographical distribution within London to LATI and the Omnibus Survey results

This appendix provides a comparison of previous published estimates of the geographic split within Greater London of tourism day visits and their expenditure. For tourism day visitor volumes it utilises the 2007 run of the Local Area Tourism Impact (LATI) model. Where appropriate, Boroughs have been aggregated on the same basis as for the GBDVS-11 analysis to facilitate direct comparison.

Although the share accounted for by 'Westminster and City' is considerably smaller in the GBDVS-11 than that estimated by the LATI model (and far more skewed to the City), the 'central area' share is relatively similar to the 43 per cent estimated by LATI. Elsewhere there are some differences. For example, it was widely recognised that LATI underestimated visits to Greenwich. However, the overall, broad picture is similar.

Figure A2-1 shows the LATI estimates which can be compared with those from GBDVS-11 in Figure 12.

Figure A2-1: London tourism day visits by geographical destination based on the Local Area Tourism Impact model, 2007 run



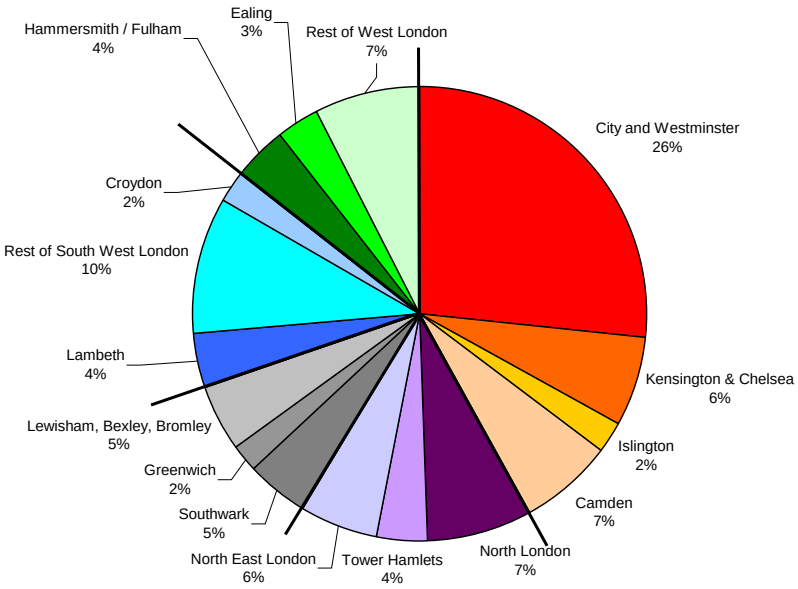
Source: *Local Area Tourism Impact model, London Development Agency / GLA Economics*[30]

Figure A2-2 shows the LATI run equivalent of Figure 13 in the main section of the Current Issues Note, examining shares of expenditure by geographical area. Note here

[30] Note here that the definitions used for aggregations are outlined in the footnote to Figure 14.

that these results are from the LATI run of 2009 and full details of the methodology used to generate these estimates can be found in a separate report on that[31]. The share of spend for the central area estimated by LATI was actually lower at 41 per cent. There is a logic behind this discrepancy. Although estimates of visitor numbers were not produced during the 2008 and 2009 LATI runs, the methodology for estimation in 2007 was a simplistic one based on the unrealistic assumption that spend per visit was the same regardless of the Borough destination.

Figure A2-2: London tourism day visitor spend by geographical destination according to LATI 2009



Source: *Local Area Tourism Impact model, GLA Economics*

The historical problem for LATI that there was such limited information on spend per visit at a Borough level begins to be addressed by GBDVS-11. However, there remain substantive issues about day visitors not being aware of which Borough they are in (or even not being aware that it is Greater London at all). This is understandable in that very often the Borough is not especially 'obvious' and it is clearly more of an issue for Greater London than for most of the rest of the UK.

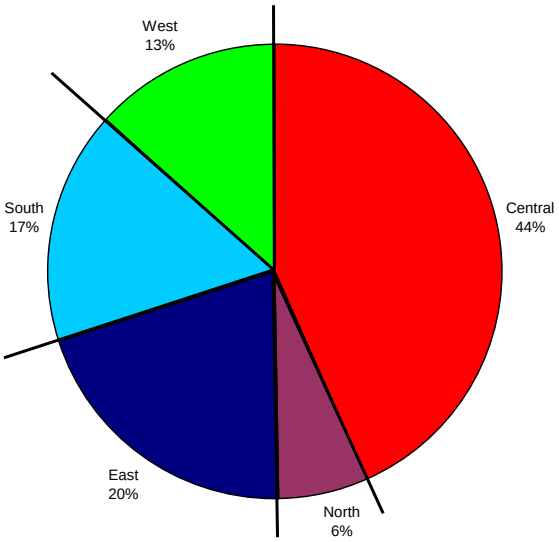
[31] Full details of the 2008 and 2009 LATI runs and the methodology behind the estimates can be found at: http://www.london.gov.uk/sites/default/files/Lati-final-full.pdf. Note that only values and not volumes were produced for the 2008 and 2009 runs.

Appendix 2-A: Geographical split of GBDVS-11 on the basis of the five sub-regions of the London Plan

This appendix provides a rework of the material in Figures 12 and 13 on the basis of London Plan sub-regions[32].

Figure A2-3 shows the distribution of tourism day visitor numbers on the basis of these sub-regions.

Figure A2-3: London tourism day visits by London Plan sub-regions, GBDVS-11

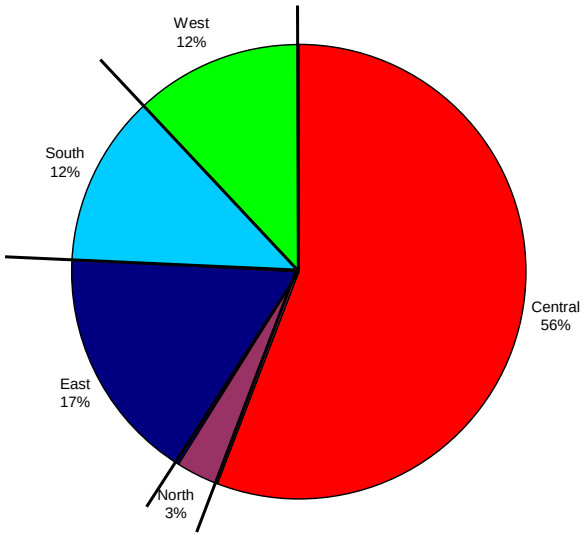


Source: *Great Britain Day Visitor Survey 2011 and GLA Economics calculations*

It can be seen from Figure A2-3 that around 44 per cent of tourism day visitors were visiting the Central sub-region (which includes both Lambeth and Southwark south of the River Thames). Figure A2-4 shows that the proportion of spend in that sub-region is even higher. It should be noted here that the 'East' sub-region includes Tower Hamlets as well as Greenwich whilst 'North' consists of only three Boroughs.

[32] Note that a map of the sub-regions can be found in this document: http://www.london.gov.uk/archive/mayor/publications/2009/docs/london-plan-initial-proposals.pdf

Figure A2-4: London tourism day visitor spend by London Plan sub-region, GBDVS-11



Source: *Great Britain Day Visitor Survey 2011, GLA Economics calculations*

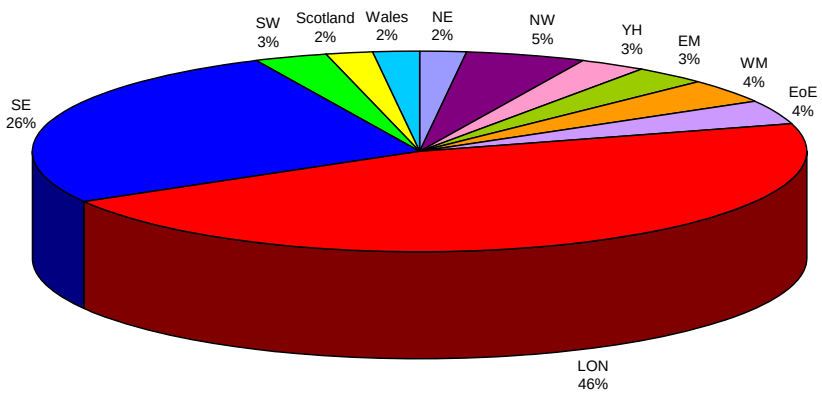
Appendix 3: Comparison of respondent regional origin to LATI and the Omnibus Survey results

This appendix presents material previously published in Current Issues Note 29 focused upon regional origin in the Omnibus Survey of 2008.

Seventy one per cent of the respondent base for GBDVS-11 was from Greater London and a further 13 per cent from the South East region.

Figure A3-1 shows respondent composition in the 2008 LDA Omnibus Survey. It should be noted that this is a markedly different composition from that of the GBDVS-11. In the Omnibus Survey just under half were from London and over a quarter came from the South East (in spite of the share from the East of England being even lower as shown in Figure 9.) Furthermore, 5 per cent of tourism day visitors to London in the Omnibus Survey came from the North West region. Therefore a considerably higher share of GBDVS-11 respondents were from London and a considerably lower share from the South East.

Figure A3-1: Origin of tourism day visitors to London in the LDA Omnibus Survey 2008 (per cent)



Source: *LDA Omnibus Survey 2008, GLA Economics*

Given that the GBDVS-11 actually had an extra filter in requiring respondents who had undertaken tourism day visits to have left their home area, much of the reason for the GBDVS-11's far greater share of London residents in its respondent base must be laid, in part, at the feet of mode effect. For example, it may be the case that those answering an online form are more likely to have time to consider (and subsequently include) a

three hour trip to a pub in a neighbouring Borough to be a tourism day visit than someone who feels hurried in a face-to-face interview. However Visit England believes that one of the drivers is that the GBDVS-11 has been much more prescriptive than the Omnibus Survey about what it means by a 'day visit'[33]. The questions asked by the Omnibus Survey allowed the respondent essentially to self-define what was intended by 'leisure' whereas the GBDVS-11 approach was to pre-define it. Therefore, a respondent to the Omnibus Survey might well not consider going out for a meal to be leisure day tourism, implying that questionnaire design as well as mode effect will be responsible for the differences.

If London partners could come to some consensus a definition of 'core London day trips' based on the information being collected by the Great Britain Day Visitor Surveys, that could form the basis of a more consistent future time series for day tourism.

[33] Note here that the questions asked by the Omnibus Survey were as follows:

- How many trips of at least three hours' duration and not done on a regular basis have you made to / within London for leisure or business purposes in the past week? (This question asked to an unweighted base of 11,094 and a weighted base of 11,088.)
- How many of these day trips were for leisure? (This question was asked to an unweighted base of 891 and a weighted base of 1,108.)

Bibliography

TNS Research for Visit England, Visit Scotland and Croeso Cymru	Great Britain Day Visitor Survey – 2011 Annual Report	April 2012
TNS Research for Visit England, Visit Scotland and Croeso Cymru	Great Britain Day Visitor Survey – Methods & Performance Report	May 2012
GLA Economics	Estimating the contribution of leisure day visitors to London's tourism industry (Current Issues Note 29)	March 2011
GLA Economics	The Local Area Tourism Impact model results for 2008 and 2009	July 2011
GLA Economics	Tourism in London (Working Paper 53)	May 2012

GLAECONOMICS

Greater London Authority
City Hall
The Queen's Walk
London SE1 2AA

Tel: 020 7983 4922
Fax: 020 7983 4674
Minicom: 020 7983 4458
Email: glaeconomics@london.gov.uk

http://www.london.gov.uk/gla-economics-publications

MAYOR OF LONDON