



GB Day Visits Survey

2011 Summary



GB Day Visits 2011

This summary report presents the headline findings of the 2011 Great Britain Day Visits Survey (GBDVS 2011).

GBDVS 2011 is jointly sponsored by the statutory tourist boards of England and Scotland and Visit Wales (the Tourism Department of the Welsh Government).

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Section 1: Introduction

The 2011 Great Britain Day Visit Survey (GBDVS) was commissioned jointly by the national tourist boards of VisitEngland (VE), VisitScotland (VS) and Visit Wales (the Tourism Department of the Welsh Government).

The survey aims to measure the volume, value and profile of Tourism Day Visits taken by GB residents to destinations in England, Scotland, Wales and Northern Ireland. Fieldwork is undertaken on a weekly basis and will continue to at least the end of 2012.

While previous surveys have been conducted with similar objectives (most recently the 2005 England Leisure Visits Survey and 2002/3 GB Day Visits Survey), changes in survey methodology and how Tourism Day Visits are defined mean that results are not directly comparable between the various surveys.

Survey methods

GBDVS 2011 was conducted using an online methodology with 38,083 interviews conducted with adults aged 16 and over resident in England, Scotland and Wales during 52 weekly survey waves.

Survey respondents were selected from an online panel with demographic quotas based on age, gender, working status, socio-economic status and area of residence applied in every survey wave to increase the representivity of the achieved sample.

Final results were then weighted to further improve the representivity of the outputs. The weighting solution used was developed for the survey by TNS, informed by a significant programme of parallel off-line interviewing (involving over 6,000 in-home interviews).

During each survey wave, respondents were asked to record details of their general leisure participation and the leisure activities they had undertaken during the previous week. This approach ensured that the responses provided were more accurate than if a longer recall period was used.

Following this approach, during the 52 weeks of fieldwork conducted for the 2011 survey, key details were recorded for 140,146 Leisure Day Visits. Of this total, full details were recorded for those 35,182 visits

which lasted at least 3 hours in duration. As described in the next section, a subset of 20,442 of these visits were classified as Tourism Day Visits, defined as not taken on a regular basis and located outside of the participant's 'usual environment'.

The adoption of this approach means that we can be confident that the survey results are representative of the GB adult population and the Tourism Day Visits taken by them during the survey period.

Further details of the survey method are provided in the Methods and Performance Report.

Definitions

Survey respondents were asked to provide details of their participation during the previous week in the following leisure activities.

Table 1.1 – Leisure activities included in definition of Leisure Day Visit

Visiting friends or family for leisure
'Special' shopping for items that you do not regularly buy
Going out for a meal
Going on a night out to a bar, pub and/or club
Going out for entertainment – to a cinema, concert or theatre
Undertaking outdoor leisure activities such as walking, cycling, golf, etc
Taking part in other leisure activities such as hobbies, evening classes, etc (outside of your home)
Taking part in sports, including exercise classes, going to the gym, etc
Watching live sporting events (not on TV)
Going to visitor attractions such as a historic house, garden, theme park, museum, zoo, etc
Going to special public event such as a festival, exhibition, etc
Going to special events of a personal nature such as a wedding, graduation, christening, etc
Going on days out to a beauty or health spa/centre, etc
Going on general days out/ to explore an area
Going on day trips/excursions for other leisure purpose not mentioned above

Any participation in the above activities, outside of the respondent's home but in any place within the UK¹ can be considered to be a **Leisure Day Visit**. When more than one activity is undertaken within a single trip away from home (e.g. undertaking outdoor leisure activities **and** going out for a meal), this is still considered to be a single Leisure Day Visit.

¹ Note: While the survey sample does not include residents of Northern Ireland, day visits taken to Northern Ireland by residents of England, Scotland and Wales are recorded.

In GBDVS 2011 respondents provided information on the volume of Leisure Day Visits taken and full details of any **Leisure Day Visits lasting 3 hours or more**. Where the details of these visits are reported they are described as **3+ hour Leisure Day Visits**.

However the main focus of this study is on those visits defined as **Tourism Day Visits**. These visits are a further subset of Leisure Day Visits defined as follows:

- **Activities** - involving participation in one or more of the activities listed in Table 1.1.
- **Duration** - lasting at least 3 hours, including time spent travelling to the destination.
- **Regularity** - the participant indicates that the visit (i.e. same activity in same place) is not undertaken 'very regularly'.
- **Place** - the destination of the visit is different from the place (i.e. city, town, village or London borough) where the participant lives. If the visit is taken from a workplace, the destination is in a different place from the workplace. This rule is *not* applied when the visit has involved watching live sporting events, going to visitor attractions or going to special public events.

The above definitions were agreed by the survey sponsors following a significant amount of testing of alternative definitions. Further details of this process and rationale for the final selected definition are provided in the Methods and Performance Report.

Scope of this report

This document provides a headline summary of the key results of the GBDVS 2011 including estimates of the total volume and value of Tourism Day Visits and the main results regarding activities undertaken, places visited and money spent during visits. Results are provided at an overall GB level and individually for visits taken to destinations in England, Scotland and Wales.

A more detailed report, The GB Day Visitor, and a detailed Methods and Performance Report are available separately².

² Published during April 2012.

Section 2: Tourism Day Visits

Volume and value of visits

During 2011, GB residents took a total of 1,545 million Tourism Day Visits. Around £52 billion was spent during these trips in the UK by GB residents.

The volume and value of visits by country is illustrated in Table 2.1. The largest proportion of visits were taken to destinations in England (85%) while 9% of visits were taken to Scottish destinations and 7% to places in Wales. By comparison the latest ONS population estimates indicate that 84% of the UK population live in England, 9% live in Scotland and 5% live in Wales.

Table 2.1 – Tourism Day Visits: Volume of visits and expenditure by destination country (millions)

	Volume of visits	Expenditure on visits
Destination	Millions	£ Millions
England	1,307	£42,670
Scotland	134	£6,152
Wales	102	£2,939
GB Total	1,542	£51,761
Northern Ireland	3	£278
UK Total	1,545	£52,040

Figures 2.1 and 2.2 illustrate seasonal variations in visit volumes and expenditure. While the largest volumes of visits were taken in the summer months, most notably in July (154 million visits) and August (157 million visits), somewhat fewer visits were taken in the winter months, particularly January (84 million visits).

It is notable that a higher volume of Tourism Day Visits were taken in April 2011 than in either May or June - this peak is likely to be as a result of the extended Royal Wedding Bank Holiday during this period.

There was more fluctuation in total expenditure levels by month with the highest value month in July when some £5.6 billion was spent during Tourism Day Visits.

Figure 2.1 - 2011 Tourism Day Visits: Volume of visits by month (millions)

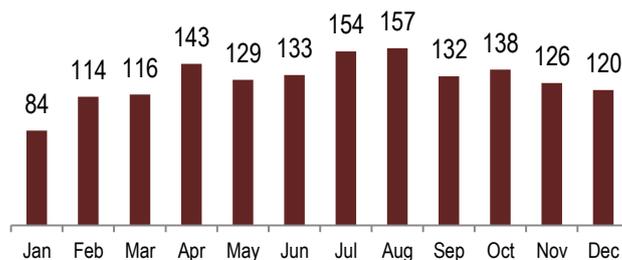


Figure 2.2 - 2011 Tourism Day Visits: Expenditure on visits by month (£ millions)

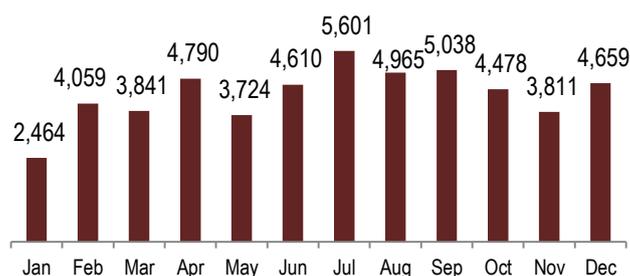


Table 2-2 illustrates the quarterly volumes of visits and total visit expenditure within each of the GB nations. The seasonal pattern is apparent across all of the countries with the lowest volumes of visits taken during the first three months of the year (20% overall) while the highest volumes were taken between July and September (30% overall).

Table 2.2 – Tourism Day Visits: Visits by quarter and destination country (millions)

Volume of visits	UK	England	Scotland	Wales
	Millions	Millions	Millions	Millions
Jan - Mar	314	269	26	18
Apr - Jun	405	341	36	28
Jul - Sep	442	369	40	32
Oct - Dec	384	328	31	24
TOTAL	1,545	1,307	134	102
Expenditure	UK	England	Scotland	Wales
	Millions	Millions	Millions	Millions
Jan - Mar	£10,364	£8,591	£1,171	£601
Apr - Jun	£13,124	£10,448	£1,776	£707
Jul - Sep	£15,604	£12,655	£2,058	£854
Oct - Dec	£12,948	£10,976	£1,147	£778
TOTAL	£52,040	£42,670	£6,152	£2,939

Destinations

The survey records details of the places visited on Tourism Day Visits allowing analysis of results at a number of geographic levels including town, local authority, county and region.

Table 2.1 on the previous page illustrates the volume and value of Tourism Day Visits taken by GB residents in 2011 to each UK nation and Table 2.3 below illustrates the distribution by former Government Office Region area in England.

The highest volume of Tourism Day Visits were taken to destinations in London (273 million) and the South East (201 million) while the smallest volumes were taken in the East Midlands (93 million) and North East (43 million). The distribution of day visit destinations broadly reflects the population distribution with the notable exception of London which is the place of residence of 15% of the English population but the destination for 21% of Tourism Day Visits.

Table 2.3 – Tourism Day Visits: Volume of visits and expenditure by England region (millions)

	Volume of visits	Expenditure on visits
Destination	Millions	£ Millions
England total	1,307	£42,670
North East England	43	£1,092
North West England	173	£5,828
Yorkshire and The Humber	139	£3,570
East Midlands	93	£3,507
West Midlands	109	£3,144
East of England	135	£3,823
London	273	£9,816
South East England	201	£7,085
South West England	141	£4,805

Survey respondents also recorded the type of place visited on Tourism Day Visits (Table 2.4). Overall, the largest volume of visits (671 million) were taken to destinations in cities or large towns while a quarter of visits were taken to small towns (383 million). Some 400 million visits were taken to destinations in more rural locations (including villages or the countryside) while 147 million visits were taken to the coast. Note that the sum of the totals in Table 2.4 is more than the total number of visits taken as visits may have included more than one type of place.

The profile of places visited varied between countries with a slightly larger proportion of Scottish visits taken to small towns while a larger proportion of visits in Wales were taken to rural and coastal locations.

Table 2.4 – Tourism Day Visits: Visits by type of place and destination country (millions)

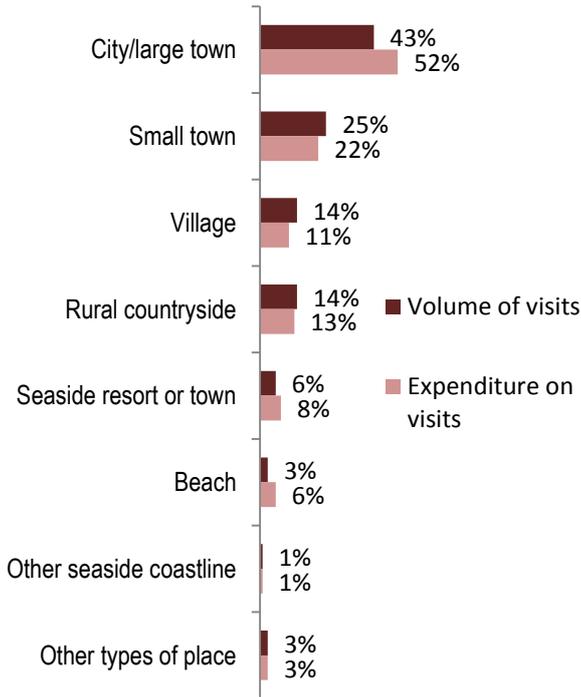
Volume of visits	UK	England	Scotland	Wales
Type of place	Millions	Millions	Millions	Millions
City/large town	671	582	57	32
Small town	383	319	38	25
Rural	400	333	34	32
- Village	210	178	16	16
- Countryside	220	180	21	19
Seaside/coast	147	111	14	21
- Seaside resort or town	100	77	9	15
- Beach	53	39	6	8
- Other seaside coastline	15	12	2	1
TOTAL	1,545	1,307	134	102
Expenditure	UK	England	Scotland	Wales
Type of place	Millions	Millions	Millions	Millions
City/large town	£26,863	£22,891	£2,754	£1,186
Small town	£11,433	£9,163	£1,598	£657
Rural	£11,164	£8,742	£1,525	£895
- Village	£5,689	£4,267	£907	£515
- Countryside	£6,516	£5,187	£813	£514
Seaside/coast	£6,503	£4,407	£1,327	£541
- Seaside resort or town	£4,348	£2,571	£1,149	£422
- Beach	£2,998	£2,049	£604	£146
- Other seaside coastline	£355	£309	£26	£20
TOTAL	£52,040	£42,670	£6,152	£2,939

Figure 2-3 overleaf illustrates the profile of types of place visited on Tourism Day Visits as percentages of total visits and total visit expenditure.

This comparison illustrates that while 43% of all visits were taken to cities and large towns, these visits represented a larger proportion of total spend (52%). Similarly, visits to seaside resorts and towns represented 6% of the total volume of Tourism Day Visits but 8% of total expenditure. This reflects a higher average spend per visit on trips to these type of place. However, as spend on visits to villages and rural locations tended to be lower, these types of place

represent a higher share of visits than share of total expenditure.

Figure 2.3 - 2011 Tourism Day Visits: Volume and value of visits by type of place visited – all GB residents (% of total)



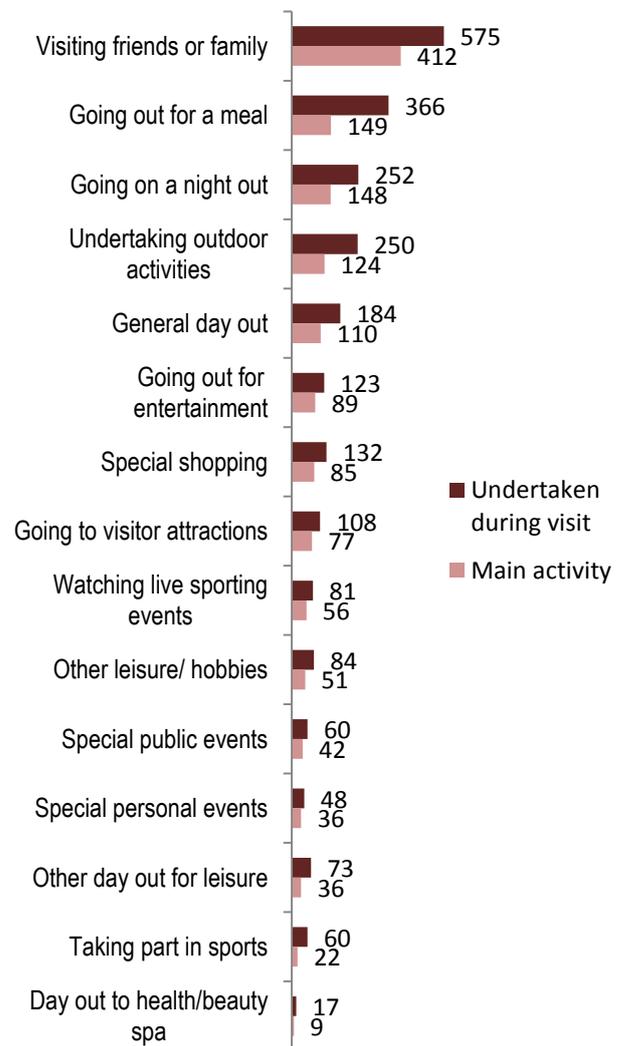
More detailed results regarding the origin and destination of visits are provided in the main report for 2011.

Activities

Figure 2.4 illustrates the volumes of visits which involved participation in one or more of a list of general leisure activities and the volumes of visit where these activities were identified as the single main activity undertaken. Overall, 575 million of the Tourism Day Visits taken by GB residents in 2011 included visits to friends or relatives (37% of visits) while this was the main activity for 412 million visits (27%).

The other most frequently undertaken activities included eating out, nights out and undertaking outdoor activities.

Figure 2.4 - 2011 Tourism Day Visits: Volume of visits by activities undertaken – all GB residents (millions)



N.B. See table 1.1 for full wording of activities used in questionnaire. 6% of visits (89m) had no single main activity.

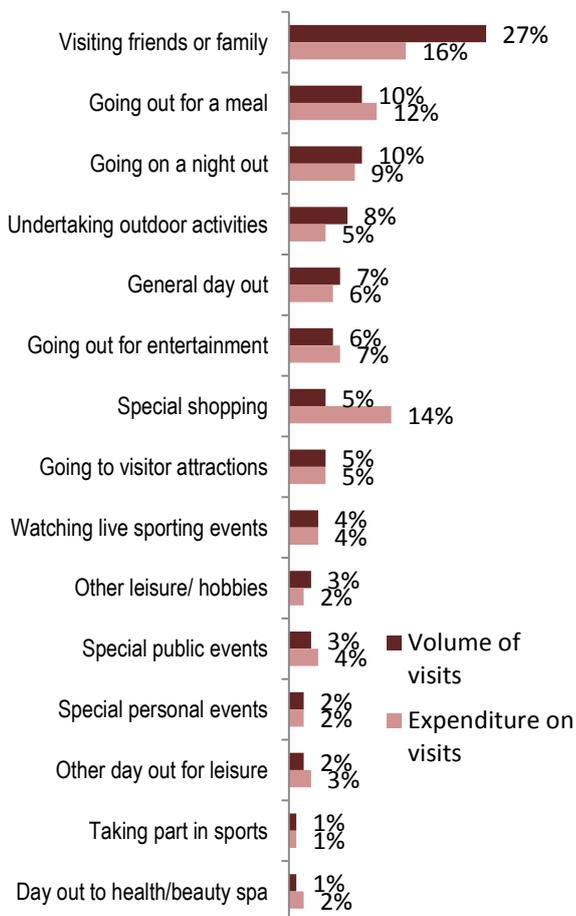
Table 2.5 on the right details the volume and value of visits taken to each country by main activity undertaken.

In terms of the volumes of visits, in all three countries visiting friends or family, eating out, going for night outs, undertaking outdoor activities and general days out were the most frequent undertaken main activities during Tourism Day Visits.

However, in expenditure terms, the largest amounts of money were spent during visits where the main purpose was either visiting friends or family (£8.3 billion) or 'special shopping' (£7.4 billion).

Figure 2.5 further illustrates these variations with visits shown by main activity as percentages of total visit volumes and total expenditure. In over a quarter of visits the main activity was visiting friends or family (27%) while 16% of total expenditure took place during these visits. However visits where the main activity was eating out, going out for entertainment and, most notably, special shopping represented a higher share of total expenditure than total volume of visits.

Figure 2.5 - 2011 Tourism Day Visits: Volume and value of visits by activities undertaken – all GB residents (% of total)



N.B. See table 1.1 for full wording of activities used in questionnaire. 6% of visits (89m) had no single main activity.

Table 2.5 –Tourism Day Visits: Visits by main activity and destination country (millions)				
Volume of visits	UK	England	Scotland	Wales
Main activity	Millions	Millions	Millions	Millions
Visiting friends or family	412	356	33	22
Going out for a meal	149	124	14	11
Going on a night out	148	125	11	12
Undertaking outdoor activities	124	102	12	10
General day out	110	88	11	10
Going out for entertainment	89	77	7	5
Special shopping	85	74	7	4
Visiting attractions	77	66	6	5
Watching live sporting events	56	48	4	3
Other leisure/ hobbies	51	43	5	3
Special public events	42	35	4	2
Special personal events	36	31	4	2
Other day out for leisure	36	31	4	2
Taking part in sports	22	18	2	2
Day out to health/beauty spa	9	7	1	1
TOTAL	1,545	1,307	134	102
Expenditure	UK	England	Scotland	Wales
Main activity	Millions	Millions	Millions	Millions
Visiting friends or family	£8,292	£6,478	£1,242	£543
Going out for a meal	£6,243	£5,201	£626	£415
Going on a night out	£4,875	£3,577	£810	£486
Undertaking outdoor activities	£2,828	£2,367	£263	£197
General day out	£2,950	£2,344	£369	£236
Going out for entertainment	£3,558	£3,046	£381	£131
Special shopping	£7,399	£6,557	£537	£305
Visiting attractions	£2,754	£2,405	£238	£89
Watching live sporting events	£2,199	£1,833	£202	£130
Other leisure/ hobbies	£934	£780	£96	£57
Special public events	£1,855	£1,682	£119	£54
Special personal events	£1,078	£789	£222	£67
Other day out for leisure	£1,695	£1,379	£281	£34
Taking part in sports	£403	£331	£58	£14
Day out to health/beauty spa	£787	£421	£177	£12
TOTAL	£52,040	£42,670	£6,152	£2,939

More detailed results regarding the general and specific activities undertaken on visits are provided in the main report for 2011.

Expenditure

In 2011 the average spend per Tourism Day Visit, including those visits where no money was spent, was £34.

Spend varied by country visited with an average of £33 spent during visits taken to places in England while, on average, less was spent on visits taken in Wales (£29) but significantly more was typically spent during visits taken in Scotland (£46).

Also, as discussed previously, average spend varied by type of place from around £27 in visits to villages to £40 in visits to cities and large towns and £44 in visits to the seaside/coast. In terms of the main visit activity, the highest average spend per visit was during visits where the main activity was special shopping (£87) while average spend was just £20 on visits where the main activity was visiting friends or family.

Table 2.6 illustrates which items were purchased during Tourism Day Visits. Overall, money was spent during 72% of the Tourism Day Visits taken by GB residents with the largest proportions of visits involving any expenditure in cafes, restaurants or bars (46%), 15% including expenditure on fuel and 10% including 'special', non routine shopping.

Reflecting the above variations in the average amounts spent, by comparison to England and Wales, a larger proportion of visits taken to destinations in Scotland involved any expenditure (76%).

Table 2.7 overleaf illustrates the total amounts spent on each category across all of the Tourism Day Visits taken by GB residents in 2011. Details of the total amounts spent on all visits taken in the UK and in visits taken to places in England, Scotland and Wales are shown.

Overall around £18.5 billion was spent on eating out during Tourism Day Visits, over a third of total expenditure (36%), while £9.9 billion was spent on 'special shopping' (19%) and £6.1 billion was spent on fuel (11%).

More detailed results regarding visit expenditure are provided in the main report for 2011.

Table 2.6 – Tourism Day Visits – Items money was spent on during visits by destination country (% of visits when money is spent on each expenditure item)

	UK	England	Scotland	Wales
Expenditure items	%	%	%	%
Any expenditure	72%	71%	76%	71%
No expenditure	28%	29%	24%	29%
TRANSPORT				
Fuel	15%	14%	18%	21%
Bus fares, car parking	10%	9%	13%	10%
Rail, tube or tram tickets	9%	9%	8%	5%
Water transport	1%	1%	1%	*
Air transport	*	*	1%	*
Car/other vehicle hire	1%	1%	1%	*
EATING AND DRINKING				
Eating/drinking out in cafes, restaurants, etc.	46%	46%	51%	48%
Food bought in shops/ takeaways & consumed on trip	17%	17%	18%	18%
ENTRANCE CHARGES				
Entrance to visitor attractions	6%	6%	8%	7%
Tickets/entrance to events, shows or clubs	8%	8%	8%	8%
Tickets to watch sporting events	2%	2%	2%	3%
Entrance to sports/leisure centres	2%	1%	2%	2%
SHOPPING				
'Special' shopping (i.e. not routine)	10%	10%	10%	9%
OTHER ITEMS				
Package travel or package tours	1%	1%	1%	*
Other travel services	1%	1%	1%	1%
Hiring equipment	*	*	1%	1%

* Less than 0.5%

Table 2.7 –Tourism Day Visits: Total expenditure breakdown by destination country

	UK	England	Scotland	Wales
Expenditure items	Millions	Millions	Millions	Millions
TOTAL	£52,040	£42,670	£6,152	£2,939
TRANSPORT				
Fuel	£6,114	£4,743	£857	£509
% share	12%	11%	14%	17%
Bus fares, car parking	£1,398	£1,115	£194	£79
% share	3%	3%	3%	3%
Rail, tube or tram tickets	£2,417	£2,107	£243	£67
% share	5%	5%	4%	2%
Water transport	£292	£257	£29	£4
% share	1%	1%	*	*
Air transport	£344	£204	£71	£28
% share	1%	*	1%	1%
Car/other vehicle hire	£375	£244	£104	£4
% share	1%	1%	2%	*
EATING AND DRINKING				
Eating/drinking out in cafes, restaurants, etc.	£18,497	£14,974	£2,363	£1,119
% share	36%	35%	38%	38%
Food bought in shops/ takeaways & consumed on trip	£2,626	£2,131	£320	£170
% share	5%	5%	5%	6%
ENTRANCE CHARGES				
Entrance to visitor attractions	£2,030	£1,637	£290	£102
% share	4%	4%	5%	3%
Tickets/entrance to events, shows or clubs	£3,497	£3,021	£323	£153
% share	7%	7%	5%	5%
Tickets to watch sporting events	£1,240	£1,001	£89	£84
% share	2%	2%	1%	3%
Entrance to sports/leisure centres	£362	£277	£56	£15
% share	1%	1%	1%	1%
SHOPPING				
'Special' shopping (i.e. not routine)	£9,948	£8,543	£836	£497
% share	19%	20%	14%	17%
OTHER ITEMS				
Package travel or package tours	£1,141	£1,001	£139	-
% share	2%	2%	2%	-
Other travel services	£169	£158	£9	£2
% share	*	*	*	*
Hiring equipment	£289	£98	£148	£42
% share	1%	*	2%	1%
Other	£1,300	£1,159	£80	£61
% share	2%	3%	1%	2%

* Less than 0.5%

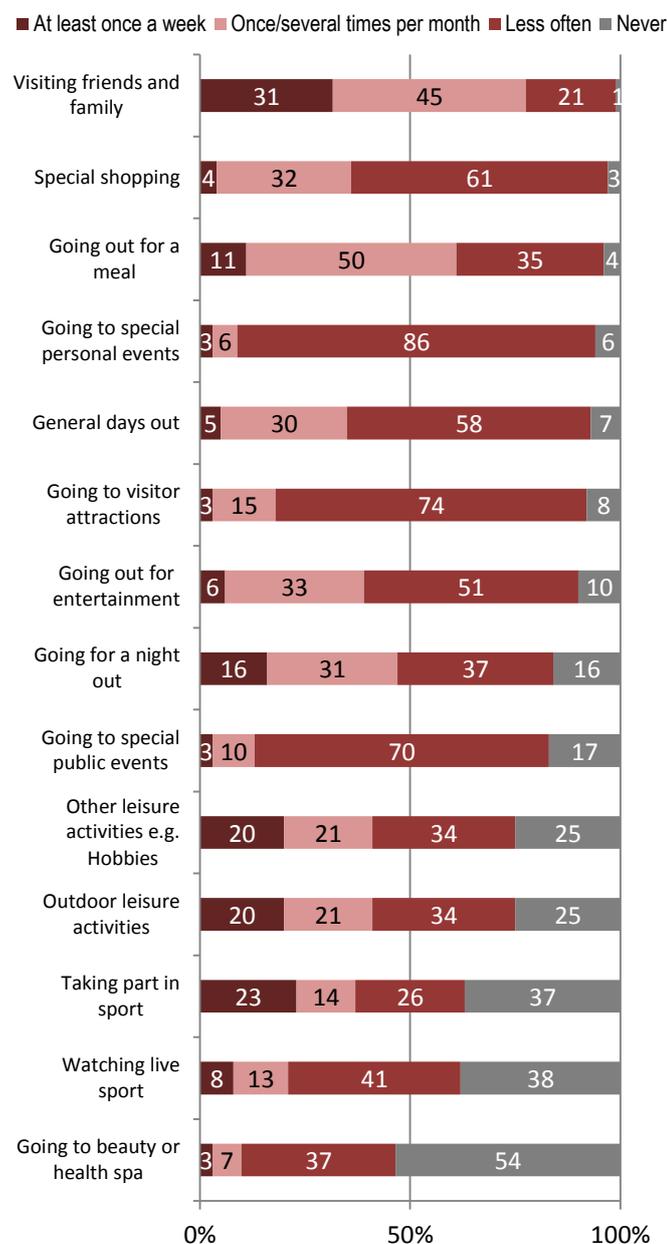
Section 3: The wider context

Measuring participation

As well as recording the volume, value and characteristics of Tourism Day Visits, GBDVS 2011 also collected more general data regarding the population's levels of participation in leisure activities.

Figure 3-1 illustrates the overall results amongst the GB population.

Figure 3-1 – GB Adult Population: General frequency of participation in leisure activities (%)



While some activities were undertaken regularly by the majority of GB adults (most notably visiting friends and relatives and eating out), levels of participation in other activities were more varied.

For example, while 25% of the population undertook outdoor leisure activities at least once a week, 25% never participated in this type of activity. Similarly 23% of the population took part in sport at least once a week but 37% never participated.

Leisure Day Visits

While the main focus of the study and this report is on visits defined as Tourism Day Visits, GBDVS 2011 also recorded the volume of all Leisure Day Visits taken and full details of any of Leisure Day Visits lasting 3 hours or more (see Section 1 for details of definitions).

Table 3.1 illustrates the estimated volume of Leisure Day Visits taken by GB residents and by residents of England, Scotland and Wales during 2011. The volume of those visits lasting 3 hours or more and the volume of visits classified as Tourism Day Visits are also shown.

Table 3.1 – Volume of Leisure Day Visits, 3+ hour Leisure Day Visits and Tourism Day Visits by country of residence				
	UK	England	Scotland	Wales
Quarter	Millions	Millions	Millions	Millions
Leisure Day Visits	8,981	7,473	962	546
Leisure Day Visits lasting 3 hours or more	2,686	2,265	266	156
Tourism Day Visits	1,545	1,327	129	89

Overall, 30% of the Leisure Day Visits taken by GB residents during 2011 lasted 3 hours or more and around 17% were classified as Tourism Day Visits.

The main report for 2011 provides more detailed analysis of the volume, value and profile of Leisure Day Visits lasting 3 hours or more.

Further information

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