



GB Domestic Travel Statistics - briefing

This document has been designed to accompany the April-December 2021 release of the Great Britain Tourism Survey (GBTS) by VisitEngland (and the project partners VisitScotland and Visit Wales) on 25 October 2021. Though some of this information will be relevant to future survey outputs.

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Further information on the background of this project and methodology changes from 2021 are available in the following documents on our website:

- Methodology and quality information
- Background Quality Report (GBTS 2021)

Background

The Great Britain Tourism Survey (GBTS) and Great Britain Day Visit Survey (GBDVS) are national consumer surveys measuring the volume and value of domestic *overnight* tourism trips and domestic *day trips* taken by residents of Great Britain. They provide detailed information about trip and visitor characteristics covering all aspects of tourism such as holidays, visits to friends and relatives and trips for business and other purposes. They are the largest and most comprehensive surveys of domestic travel by the GB population.

Whilst the domestic travel statistics had been produced in a broadly similar way since 1989, there have been changes in GBTS/GBDVS survey methods and the information collected via these in response to changing circumstances. Till 2010 data was produced through the United Kingdom Tourism Survey (UKTS) and since 2011 through the Great Britain Tourism Survey (GBTS). As the names suggests UKTS considered the whole of the UK, and is not directly comparable with the GBTS from 2011, which considers residents of Great Britain only. Prior to 2020, the surveys have operated as separate stand-alone surveys with GBTS running as a continuous in-home face to face survey since 2006 and GBDVS running as an online survey since 2011.

Uses of the information

The surveys provide information for the following purposes:

- To provide official estimates of GB residents domestic tourism
- To track changes in destination performance over time, including GB nation, NUTS1, County and LA geographies
- To uncover market trends and changing visitor needs
- To enable analysis of performance by relevant trip types
- To enable analysis of trip behaviour by key demographic and market segments
- To ensure data comparability across GB as a whole
- To provide DMOs and local authorities with the relevant data to compile economic impact assessments
- To provide statistical inputs into various models for the visitor economy including Tourism Satellite Account
- To provide information for reporting in official publications by UK and inter-governmental bodies such as UNWTO

Information from the surveys is used by the GB and devolved governments and a wide range of public and private sector organisations in the tourism industry. The insights and trends are used to enhance understanding of the domestic market helping to inform their strategies, policies and activities.

Summary of recent changes

In 2019/20, the sponsors of the GBTS and GBDVS surveys VisitEngland, VisitScotland and Visit Wales commenced a review of the surveys' scope and methods, prior to issuing a new contract tender covering both domestic overnight and day visitor surveys.

The review has resulted in a number of changes that will help future-proof the surveys and provide greater consistency with information for other destinations, whilst maintaining the reliability and robustness of the information reported.

A list of these changes is below with further information in the sections that follow:

- Integration of the surveys into a single combined survey
- Change in survey methods, with both using an online methodology
- Revised definitions for the key trip measures
- Updated questions and enhanced information collection
- Updated data validation and revised methods for trips and expenditure estimation
- Enhanced reporting to meet user needs including meeting accessibility requirements

Justification for change

The sponsor led review identified a number of factors that together provided a strong rationale to update the methods and content of the two domestic surveys.

A combination of falling response rates, higher fieldwork costs and the limited number of suppliers offering a suitable in-home omnibus survey meant the previous face-to-face survey for GBTS was no longer viable. This provided the opportunity to combine the two surveys into an integrated online survey providing cost and survey efficiencies and enabling better comparison of the results from the two surveys.

At the same time, there has been an opportunity to develop the questionnaire to make it easier for users to complete and to align with changing travel behaviours. The online methodology provides flexibility to collect additional information over time to meet changing user requirements. We anticipate the new survey will provide richer information on trip and travel profiles, more timely reporting of outputs and an enhanced ability to analyse and interrogate the results.

Survey method and sample

The two surveys have been combined into a single online survey method, representing a change in survey method for GBTS, but a continuation of an online survey method for GBDVS.

The survey uses a new questionnaire, with shared sections on overall trip taking and responder profiles and respondents routed to complete either the detailed section on day trips or the section on overnight visits. The use of the same sample source and questionnaire provides an opportunity gain better insights into the relationship between day trips and overnight stays

The sample for the combined survey is sourced from 4 ESOMAR accredited online panel providers and includes quotas for key demographic variables and region of residence to make the overall sample as representative as possible of GB population. The aim is to maintain the robustness of the previous surveys, with the following target number of contact interviews.

Table 1: Target annual contact sample for GBTS and GBDVS

Target number of contact sample	Total GB	England	Scotland	Wales
GBTS	60,000	42,000	9,000	9,000
GBDVS	35,000	25,000	5,000	5,000

The survey runs weekly with the same recall periods previously used with GBTS responders asked about overnight trips taken during the previous 4 weeks and GBDVS responders asked about day trips taken in the previous week.

Trip definitions

The survey includes new questions to help align the key measures of trips, nights and expenditure with internationally agreed definitions for *same day* and *overnight* tourism trips. This will enable more accurate reporting of tourism specific trips and improve comparability with trips reported by other destinations using the internationally agreed definitions.

Information collected

As far as possible, there is consistency with previous information collected, but new questions capture information on trips taken outside of the UK, more detailed information on activities undertaken, more detailed information on booking methods and timescales and enhanced information on responder profiles including protected characteristics.

The question set, script and routing of the new survey needed to change for the new combined online survey method. The questionnaire is re-designed to make it easier for responders to complete the survey and to improve the reliability of the data collected. Survey responders complete universe questions (demographics, protected groups and outbound travel) then are either routed to GBTS or GBDVS questions. Each section contains questions as follows on the next page:

Universe questions

- Gender
- Region of residence
- Age
- Occupation level
- Children in household
- Marital status
- Car ownership
- Time spent online
- Educational attainment
- Ethnic group
- Health conditions and impairments
- Sexual orientation
- Trips taken outside of UK last 4 weeks by purpose of visit

Great Britain Tourism Survey (GBTS)

- Trips taken last 4 weeks in GB
- How regular trip taken
- Trip Purpose
- Length of Stay
- Type of location stayed
- Type of accommodation
- Party composition and size
- Travel party impairments
- Transport to and around destination
- Detailed activities undertaken
- Importance of activity in trip decision
- Was trip part of package trip
- How far in advance booking made
- Booking channel
- Expenditure breakdown by category

Great Britain Day Visits Survey (GBDVS)

- Participation in leisure activities last week
- How regular day trip taken
- Day trips involving specified activities
- How long trips lasted –including and excluding travel time
- Type of location visited
- Where did trip start from e.g. home
- Party composition and size
- Travel party impairments
- Main transport used
- Detailed activities undertaken
- Time spent travelling during the trip
- Expenditure breakdown by category

Estimation and weighting

The data collected via the survey is quality assured during processing to remove invalid records and to correct for missing, incomplete or outlying data. A revised weighting scheme has been introduced to improve efficiency, whilst making the results as representative as possible of the GB population. However, the use of a non-probability online sample can impact the extent to which the survey responses can be representative of the full GB population, a limitation of all online sample surveys.

Quality assurance

Given the changes to the surveys, the sponsors have sought an independent review by the Method Advisory Service of Office for National Statistics, which looked in detail at the new survey method, sample design and estimation and weighting approach.

The main recommendations suggested further analysis to support the weighting and estimation approaches, to check for potential bias in the sample sources and to make clear for users the impact of changes in the survey methods and the resulting limitations of the data. This work was completed ahead of the publication of the 2021 data.

Comparability

The substantial changes in survey method and information collected from the surveys is likely to create a step change in reported trip and spend measures, further impacted by any changes in trip behaviour resulting from COVID-19. This limits comparability of the results from the new survey with GBTS and GBDVS data reported for 2019 and proceeding years. We are therefore recommending that 2021 is the start of a new trend series.

However, reports and data for the surveys prior to 2019 will continue to be available via the websites of the survey sponsors.

Designation

All data reported up until the end of 2019 on the GBTS and GBDVS are designated as official statistics reflecting their importance to users and the quality of methods and outputs.

Due to the significant changes to the statistics from 2021 data will be badged as experimental statistics to enable further survey development, quality assurance and to ensure the new survey deliverables meet user needs. This is a standard procedure for any change in official statistics with the intention to return to official statistics status in the future.