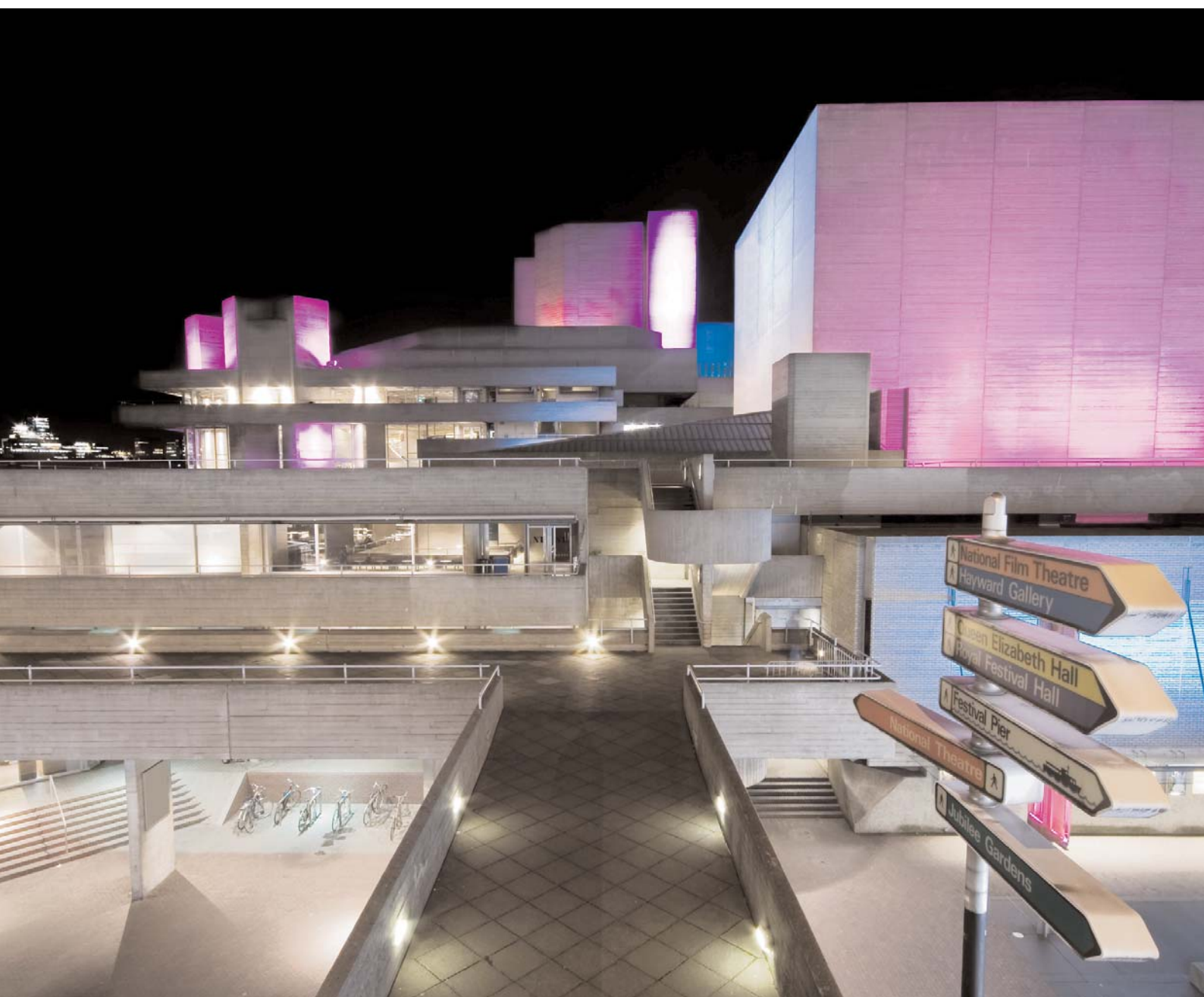


Current Issues Note 29

Estimating the contribution of leisure day visitors to London's tourism industry

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Introduction

Tourism is important to London's economy with more than 14 million overseas visitors in 2009¹. That makes London the most visited city in the world (in terms of international visitors). However, given the strategic importance of tourism to London's economy, one particular component of it – day visits – is understood relatively poorly.

There are three components of tourism: domestic tourism – for which reasonable data are available from the UK Tourism Survey (UKTS); international tourism – for which indicative data are available from the International Passenger Survey (IPS) and day visitors to London. Day visitor spend is likely to contribute a significant proportion of tourism receipts in London but the size of this contribution is significantly more difficult to establish on account of a paucity of reliable and robust data.

National tourism data in general is still far from perfect with the Allnutt Review having concluded as far back as 2004 that, 'existing sources are no longer fit for purpose'². In recent years, the Office for National Statistics (ONS) has given the issue more focus, publishing a simple accounting methodology for the production of regional figures consistent with national headline figures contained in the Experimental UK Tourism Satellite Account (E-UKTSA)³. However, in particular, there is currently a lack of official tourism day visitor data available for London. The last national survey was the England Leisure Visits Survey (ELVS) in 2005. However, this survey did not provide value and volume data for day visits to the London region. That means the latest London level data available is from the 2002-03 Great Britain Day Visits Survey (GBDVS). The ONS Tourism Intelligence Unit (TIU) has been developing a new day visitor survey as part of the English Tourism Intelligence Partnership (ETIP) project⁴.

In the absence of timely official data, in 2008 the London Development Agency (LDA) took steps to develop a means to provide timely tourism day visitor estimates for the capital. An Omnibus Survey of UK households, conducted throughout 2008, was used to estimate tourism day visitor expenditure and volumes for London. Estimates produced from this survey are presented in this paper but are experimental in nature and should therefore be treated with a degree of caution.

¹ Visit London: London Visitors: Essential Market Insights (2010).

² National Statistics Review of Tourism Statistics – National Statistics Quarterly Review Series, Report #33, DCMS / ONS (2004).

³ See Buccellato, Webber, White, Ritchie and Begum – 'The economic impact of tourism across regions and nations of the UK' in Economic and Labour Market Review, Vol 4, No. 5 (May 2010).

⁴ The English Tourism Intelligence Partnership was created by the Partners for England. The purpose of the Partnership is to lead action and investment by various parties to improve tourism intelligence within England. This includes, but is not limited to, improving the quality of data on tourism activity, improving and authenticating the methods for evaluating the economic impact of tourism activity and expenditure, creating standards for data collection, generating and disseminating good practice, making better use of existing data sources and providing an authoritative and independent perspective on the tourism sector supported by robust and credible evidence.

This present Current Issues Note aims to provide an understanding of the different surveys that have been used to measure tourism day visits and spend in London and to detail work conducted at the LDA aimed at improving the state of information.

The first section of the report provides details and results of the most recent National Day Visitor Surveys – the GBDVS and ELVS. Outlined are the key limitations of the National Surveys, including timeliness and coverage for London. The next section considers the LDA Omnibus Survey, highlighting the latest tourism day visitor estimates for London. The final section of the report looks at the differences between the Omnibus Survey and previous data sources used.

Day Visitor Surveys

Great Britain Day Visits Survey 2002/03 (GBDVS)⁵

The 2002/03 GBDVS measured the number of home-based leisure day trips taken by the adult population (aged 16 and over) and also provided an estimate of the value of such leisure day visits. Each month from March 2002 through to March 2003, interviews were conducted face-to-face with a representative sample of Great Britain residents using CAPI technology⁶. Respondents were asked about leisure day visits which they had taken within Great Britain in the two week period prior to interview, including the English Government Office Region visited if applicable.

'Tourism' day visits – of primary interest for this report – in the GBDVS were a subset of leisure day visits, defined as visits that lasted three hours or more and not taken on a regular basis. The GBDVS provided separate information on the volume and value of tourism day visits. Interviews were completed with almost 3,200 people in England, over 1,900 in Wales and just fewer than 1,500 people in Scotland (from random samples of residents selected separately for each country) – totalling roughly 6,600 interviews.

In the GBDVS the sample of respondents across Great Britain as a whole reported 4,786 tourism day visits in Great Britain in the two-week recall period (including multiple trips reported by some respondents)⁷. However, the destination by Government Office region was only identified in the case of around half of these responses⁸. The survey identified and collected information on 299 trips to London⁹. Some of the figures provided in the report are included for sake of completeness rather than because the estimates are deemed to be statistically robust and estimates where the sample size is small should be treated with caution.

The sample size issue is a key limitation of the GBDVS with regards to the provision of London level data as estimates at a regional level are based on relatively small samples compared to those for Great Britain as a whole.

Grossing up in the GBDVS

The underlying survey was sampled to be representative of the country as a whole. However, Wales and Scotland were over-sampled deliberately. Therefore, results from the raw survey provided probabilities that individuals from each region would have visited London. These probabilities were then applied to the overall population of each region as measured by the Census of 2001 to arrive at the total number of visits to London from that region. This could then be summed to arrive at a total day visits figure.

⁵ GBDVS summary, report, tables and appendices available from

<http://www.naturalengland.org.uk/ourwork/enjoying/research/monitor/leisuredayvisits/default.aspx>.

⁶ CAPI stands for Computer Assisted Personal Interviewing, a computer assisted data collection method replacing paper and pen methods and conducted using a portable computer.

⁷ See table 12 of GBDVS for further detail.

⁸ 2,359 visits.

⁹ See Table 18b of GBDVS.

Estimates of London day visits derived from the GBDVS

From the GBDVS it was estimated that during 2002/03 46 per cent of British adults had taken at least one tourism day trip somewhere in Great Britain in the two week period prior to the interview. Therefore, of the 45.6 million adult population in Great Britain in 2002/03 it was estimated that 20.8 million had taken a tourism day visit during the recall period¹⁰.

Bearing in mind the caveats outlined above regarding unreliable sample sizes, the total number of tourism day visits in London in the year 2002/03 was estimated to be 130 million trips. London was estimated to be the second most popular destination of the Government Office Regions with the South East of England attracting the most tourism day trips (an estimated 194 million trips). The total expenditure on tourism day visits in London was estimated to be £3.69 billion for 2002/03¹¹. The total expenditure was calculated as the average expenditure per trip multiplied by the number of trips. Average expenditure was calculated using a methodology that sought specifically to eliminate double counting where one member of a party had (for example) paid for admission tickets for a whole group.

Table 1: London results from the 2002/03 Great Britain Day Visits Survey

Tourism day visits in 2002-03	London
All trips	130 million
Average £ spent per trip	£28.50
Total expenditure	£3.69 billion
Average trip duration	6.3 hours
Average time at destination	3.6 hours
Average distance travelled to destination	32.9 miles

Source: Great Britain Day Visits Survey 2002/03, Table 18b

Table 1 above gives some indicative idea of the average distance travelled to London as a day visit destination and the average amount of time estimated to have been spent there. The results suggest that the 'typical' day visitor comes from well within the Greater South East area and spends a relatively short time in the capital (averaging 3.6 hours).

England Leisure Visits Survey (ELVS) 2005¹²

The England Leisure Visits Survey (ELVS) is the most recent national day visitor survey undertaken. It was a survey of English residents regarding trips taken within England, with interviews spread evenly throughout the period February 2005 to February 2006. Day trips made by England residents to Scotland, Wales or Northern Ireland were not included in the 2005 survey¹³. Respondents were asked to list all leisure trips that they had undertaken *in*

¹⁰ See GBDVS Table 11.

¹¹ See GBDVS Table 18b.

¹² England Leisure Visits Survey report: http://www.enjoyengland.com/Images/Day%20visits%202005_tcm21-189039.pdf

¹³ Day trips made by England residents to Scotland, Wales or Northern Ireland represented less than 1 per cent of the trips recorded in the Great Britain Day Visits Survey 2002/03.

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the past week, as opposed to the two-week recall period for the previous GBDVS. In order to improve comparability between the two sets of survey data, the GBDVS results were reanalysed focussing entirely on visits made within the previous one week to interview for those respondents with English addresses only. The ELVS definition of tourism day visits is consistent with that used by the GBDVS – a round trip which starts and ends at the home for leisure purposes, lasts for three hours or more and is not taken regularly. Thus tourism day trips are again a subset of all leisure day trips¹⁴.

Surveying methodology used by ELVS

Unlike GBDVS' use of CAPI, ELVS interviews were conducted by telephone with respondents in England aged 16 years and over. Interviews were conducted each month from February 2005 to February 2006. Respondents were asked about leisure day visits that they had taken to England within the last week prior to the interview. The sample surveyed for tourism day visits to England was larger than the GBDVS survey with a sample of 23,547. A sample of respondents travelling to London was not included as part of this survey.

It should be noted that telephone interviewing introduces a coverage bias into the sample, almost by definition. Those without landlines, the homeless and the institutionalised tend to be omitted¹⁵ lowering the survey denominator. Conversely, it is also argued that some sections of low income groups are also over-sampled as telephone surveys often skew the sample towards a greater proportion of low income respondents as higher income earners appear more likely to screen their calls or refuse to take part in an interview.

Data and sampling issues relating to ELVS

For the purposes of London day visits research, the most severe limitation of the ELVS is that it did not record destinations visited by Government Office region. Instead visits to inland urban destinations were recorded. As a result no useful information regarding the volume and value of tourism day trips specifically made to London is available from this survey.

The results from ELVS showed that in 2005, 17 per cent of adults in England made a tourism day visit during the week prior to being interviewed. This compared to 29 per cent of adults in 2002/03 when the GBDVS survey results were re-analysed to provide direct comparison with ELVS. In the 12 month period of the 2005 ELVS there was an estimated 0.87 billion tourism day trips in England which was a 5 per cent decrease from the estimated 0.92 billion trips taken in England in 2002/03 based on the re-analysed 2002/03 GBDVS data¹⁶.

However, this needs to be put in the context of the 19 per cent increase overall in the estimated total number of trips that resulted from the reanalysis of GBDVS data to align more closely to ELVS. Changes included a switch of recall period to one week (prior to annual scale-up), the alignment of coded responses, a switch from destinations in Great Britain to only those in England and reweighting.

¹⁴ However, the GBDVS results had to be reanalysed in order for direct comparison with ELVS to be undertaken as key differences between the two surveys included recall period and geography.

¹⁵ There are now ways around omitting 'mobile only' households but there may still be residual bias in the sample as a result of this.

¹⁶ See ELVS Figure 3.A.

In the absence of any official data for London, the LDA used a defined methodology (set out in what follows) to estimate London level tourism day visitor values and volumes for 2005 and 2006. The 2005 estimates used comparable data from the 2002-03 and 2005 surveys on tourism day visits to English urban destinations. Further information from other national tourism surveys (the UK Tourism Survey, the International Passenger Survey and visitor attraction numbers) was also used to account for the weaker tourism conditions in London following the terrorist bombings on 7 July 2005. In the absence of official 2006 data the number of tourism day trips to London was taken to be as unchanged from the 2005 estimate and expenditure by tourism day visitors was increased from the 2005 estimate in line with the Retail Price Index (excluding mortgage payments – RPIX) measure of inflation. In retrospect, it seems likely that day visits to London bounced back relatively quickly after the terrorist incidents in line with most other indicators of tourism activity.

According to official data from the ELVS, expenditure on tourism day visits across England as a whole increased to £37.4 billion in 2005. This was an increase of 21 per cent in real terms from the 2002/03 re-adjusted figure of £30.8 billion¹⁷. According to LDA estimates, spending in London rose less markedly from £4.7 billion in 2002/03 to £5.0 billion in 2005. The number of trips to London was estimated to be 132 million in 2005 (with the number assumed to be unchanged for 2006). Tourism day visitor spend in 2006 was estimated to be £5.2 billion (rising in line with RPIX inflation). The methodology used by the LDA for these estimates was based on the 2002/03 GBDVS expenditure by category, incorporating revisions that had already been made to this – classifying some categories as comparable and others as not. Adjustment factors for each of the categories of expenditure were then estimated. The effect of the London bombings in 2005 was modelled based on the response of overall domestic tourism figures.

Grossing methodology in ELVS

The methodology used for grossing in the ELVS was broadly similar to that used for the GBDVS, although there were a few differences. The group of commissioning bodies included the English national parks as well as Natural England so a boost was included focused on the national parks that did not affect the main sample that included the London sample.

It should be noted that neither the GBDVS nor the ELVS attempted to capture business day trips.

London Development Agency Omnibus Survey

Given the ongoing problem of a lack of official data on London day visitor tourism, the LDA took steps to provide estimates for day visits to London in 2008. Results from questions added to an Omnibus Survey of UK households from March to December 2008 were used to derive experimental estimates of day visitor expenditure and volumes for the capital. These questions were:

¹⁷ See ELVS Figure 3.G.

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- 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? (*Question asked to a sample of: unweighted base: 11,094; weighted base: 11,088*)
- How many of these day trips were for leisure? (*Question asked to a sample of: unweighted base: 891; weighted base: 1,108*)
- Approximately how much did you spend in London in total on your most recent leisure trip? (*Question asked to a sample of: unweighted base: 572; weighted base: 681*)
- Approximately how much did you spend in London in total on your most recent business trip? (*Question asked to a sample of: unweighted base: 421; weighted base: 541*)

As can be seen the first of these questions was put to over 11,000 people but only a little over 5 per cent of that number had actually undertaken a London leisure day trip.

Based on results from the 2008 Omnibus Survey the estimated figure for leisure tourism day visitor expenditure in London is £12.2 billion for 2007. An additional £6.3 billion for 2007 was estimated for business tourism day visitor expenditure. A tourism day visit is defined as a trip of at least three hours duration that is not taken on a regular basis. This definition is consistent with that used for ELVS and GBDVS for a tourism day visit. As a result, as with all day visit surveys the definition of a tourism day visit covers activities that may not as a matter of course be considered 'tourism'. For example; shopping trips to different town centres/shopping centres; trips to the theatre/sports events; days out to a park/house/museum etc. Given the wide definition of tourism day visits, it is perhaps not too surprising that estimates for day visitor expenditure are large as the boundaries between tourism and everyday expenditure become blurred.

Leisure Day Visitors and their Expenditure Estimated from the LDA Omnibus Survey

This section of the paper considers the day visitor estimates from the LDA Omnibus Survey in greater detail along with a consideration of the differences between the different day visit surveys.

The value and volume of tourism day visits for London in 2008

The value and volume of tourism day visits based on the LDA Omnibus Survey for London is shown in the table below with 181 million leisure tourism day trips estimated for 2008. This was calculated by taking the number of trips recorded by each respondent in the survey and dividing this number by the total sample size (to get an average probability of an individual making a trip to London). This probability was then grossed up to the GB population as a whole and multiplied by 52 in order to get an estimate of the total number of day trips made to London in that year¹⁸. The total spend during this period by these visitors was estimated to be something in the order of just over £12 billion.

Table 2: Day visitor estimates in 2008

Greater London	2008 (millions)
Day visits (3+ hours)	181.0*
Spending (£)	12,184*

* Experimental statistics and do not include business travellers

Source: LDA questions on Ipsos MORI Omnibus Survey of UK Households 2008, ONS UK population estimates, LDA calculations

Leisure Day Trips by Government Office Region of Origin

Estimates derived from the Omnibus Survey results show that just under a half of the total 181 million London leisure tourism day trips were made by residents of Greater London – that is leisure tourism day trips made within Greater London itself (47 per cent of total trips).

Of the other UK regions, the South East of England Government Office Region was the most frequently identified place of origin for leisure tourism day trips to London, representing 27 per cent of all trips. Proportions of the total number of trips to London from all other regions were very considerably smaller ranging from 2 to 5 per cent).

Note that the regional analysis here is based on the total number of tourism day trips to London. The numbers of people travelling from each region as some proportion of that region's adult population has not been examined as part of this analysis.

¹⁸ Missing values were removed as were records where spend had been recorded as over £500 per trip. Following the methodology of ELVS and GBDVS, the UK's base population for the purposes of this calculation was taken as all those aged 16 or over.

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Table 3: Number of day leisure trips by region of origin

Region	Total Number of Trips (millions)	% of total trips to London
Great Britain	181	100
East Midlands	5.43	3
East of England	7.24	4
London	85.07	47
North East	3.62	2
North West	9.05	5
Scotland	3.62	2
South East	48.87	27
South West	5.43	3
Wales	3.62	2
West Midlands	7.24	4
Yorkshire and Humber	5.43	3

Source: LDA questions on Ipsos MORI Omnibus Survey of UK Households 2008, ONS UK population estimates, LDA calculations

Note: The results for the East of England seem unexpectedly low but this must be connected with the sample.

Leisure Day trips spend by region of origin

In terms of spend, estimates based on results from the Omnibus Survey showed that London residents provided 33 per cent of receipts received from leisure tourism day visitors. South East of England residents were the second largest contributors to leisure tourism day visitor spend in London, contributing 28 per cent of total spend in 2007.

Table 4: Spend estimates by Government Office Region of origin

Region	Spend (£billions)	% of total spend in London
Great Britain	12.2	100
East Midlands	0.49	4
East of England	0.73	6
London	4.02	33
North East	0.02	0
North West	1.00	8
Scotland	0.24	2
South East	3.41	28
South West	0.61	5
Wales	0.49	4
West Midlands	0.49	4
Yorkshire and Humber	0.73	6

Source: LDA questions on Ipsos MORI Omnibus Survey of UK Households 2008, ONS UK population estimates, LDA calculations

Note: The results for the East of England seem unexpectedly low but this must be connected with the sample.

Summary Comparison of Surveys

Table 5 provides a summary of the three different surveys and the methodologies used for each.

Table 5: Comparison of GBDVS, ELVS and Omnibus Survey methodologies

Survey	Year	Population Surveyed	Method	Period	Sample size
GBDVS	2002 /03	Adult population aged 16 years and over living in Great Britain.	Face to face interviews (CAPI)	Trips taken from March 2002 to March 2003	Sample of 6,600 surveyed nationally – of which 46% had taken a trip over the previous two weeks. Sample of 299 tourism day visits in London
ELVS	2005	Adult population aged 16 years and over living in England	Telephone interviews	Trips taken from February 2005 to February 2006	Sample surveyed for tourism day visits to England: 23,542 (respondent-based file); 43,813 (trip-based file) Sample surveyed for visits to London: N/A
LDA Omnibus Survey	2008	'Adult' population aged 15 and over living in Great Britain	Face to face interviews (CAPI)	Trips taken from December 2007 to December 2008	Sample surveyed for tourism day visits to England: 11,094 Sample surveyed for visits to London: 891

Table 6 summarises the different survey results for day visitor tourists to London and their expenditure. Whilst noting that on account of origin data and sample size differences, the surveys are not strictly comparable.

Table 6: Comparisons of London tourism day visitor volume and value from GBDVS, ELVS and Omnibus Survey

Survey	Year	Tourism Day Leisure visits	Average expenditure per trip	Total expenditure
GBDVS	2002/03	130 million to London	£28.50 in London	£3.69 billion in London
LDA estimates (based on ELVS National Survey)	2005	132 million to London	£37.79 in London	£5.0 billion in London
LDA estimates (based on ELVS National Survey)	2006	132 million to London	£39.00 in London	£5.2 billion in London
LDA Omnibus Survey	2008	181 million to London	£67.31 in London	£12.18 billion in London

One important characteristic of the GBDVS which is different in its approach from other surveys is the calculations used to derive expenditure levels for tourism day visitors. The GBDVS derived total expenditure figures from the sum of average expenditures for different categories of spend such as food, drink, entertainment etc. This was then multiplied by the estimated total number of trips. The GBDVS also employed a check question to make certain that the aggregated amount made reasonable sense. As noted earlier, the methodology used for the LDA 2005 and 2006 estimates also drew on these individual expenditure categories from the GBDVS. In contrast, the LDA's Omnibus Survey calculates the total expenditure figure for tourism day visits by asking respondents how much they spent on average on a day visit. This estimate was then multiplied by the estimated total number of trips taken. The different methods used by the different surveys to calculate expenditure levels may explain some of the differences in the estimates outlined in Table 6. The important point to note is that the GBDVS never specifically asks respondents to estimate their total expenditure per visit. ELVS used the GBDVS questionnaire base with some modifications¹⁹.

The results shown in Table 6 illustrate a significantly larger estimate for tourism day visits and expenditure in London for 2008 compared to 2006 and 2005 estimates²⁰. There are several possible interpretations to this finding as the apparent discrepancy could be a result of:

- (i) A genuine significant increase in day leisure tourism post-2005;
- (ii) A serious underestimate of the day leisure visits and expenditure by both the GBDVS and the ELVS;
- (iii) An overestimate (in terms of visits and/or expenditure) produced by the methodology attached to the LDA Omnibus Survey methodology.

¹⁹ These modifications are outlined in Appendix 3 of the England Leisure Visits Report: 'Changes to questionnaire script from GBDVS to ELVS'.

²⁰ No estimates were produced for 2007.

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Each of these possibilities will now be examined critically in turn:

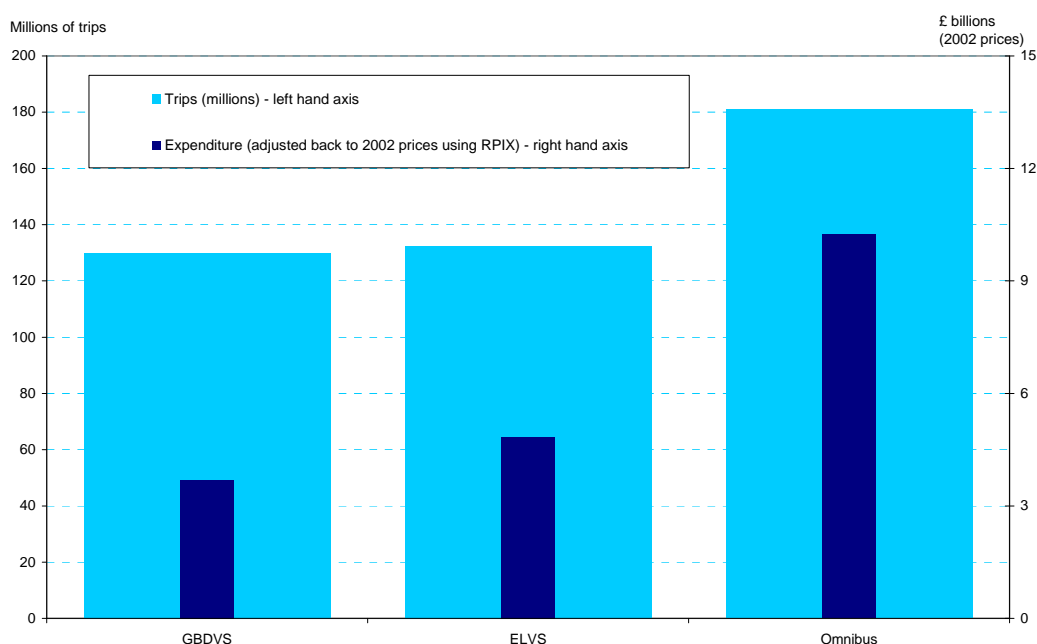
(i) A genuine increase in day leisure tourism

Whilst this is perfectly possible, the domestic and international tourist components to overall levels of London tourism do not appear to have increased by a comparable proportion. Indeed, although the UKTS data on domestic tourism are not strictly comparable, through the period from 2002 to 2008 domestic tourism to London appears to have decreased by around 37 per cent. However, all of the fall occurs in the 2002 to 2005 period with trips from 2005 to 2008 increasing by 5.2 per cent according to UKTS data. Overseas tourism figures to London decreased by 4.6 per cent from 2002 to 2008 according to the International Passenger Survey (with trips between 2005 to 2008 increasing by 2.5 per cent).

(ii) A serious underestimate of day leisure visits by the ELVS and GBDVS

Previous surveys may have underestimated day leisure visits and expenditure in London. There are two essential reasons why this could be the case related to (i) number of respondents and (ii) the methodology used for grossing. The only 'real' data available for London is from the GBDVS which was based on a relatively small sample size of just 299 (compared to nearly twice that for the LDA Omnibus Survey). The GBDVS may have underestimated tourism day trips by London residents within London (which were shown to be a significant proportion of total trips by the Omnibus Survey). The LDA Omnibus Survey was particularly concerned to capture all day trips within London and this was relatively easy to convey at interview because the survey was focused solely on London. In contrast, such a message was far harder to convey in the previous surveys since they were not focused solely on London (and in the case of one of them the primary areas of interest were rural²¹).

Figure 1: Trips and expenditure (rebased to 2002 prices) from the three surveys²²



Sources: GBDVS, ELVS, LDA Omnibus Survey, GLA Economics

²¹ The reason for this is tied to the sponsors of the survey.

²² Adjusted by RPIX.

Figure 1 above demonstrates that, whilst estimated, grossed-up trip numbers drawn from the three surveys showed an increase in trip numbers of just under 40 per cent between the GBDVS and the Omnibus Survey, the increase in expenditure was much more marked – in the order of 175 per cent, even after adjusting for price increases. Of course, some of this could be a genuine increase in expenditure per day visitor. However, for comparison, according to Experian Economics, household disposable income as a whole rose by only 26 per cent over the same period²³. In order to get some idea of comparators, the LDA Omnibus Survey figure has been compared with the Northwest Day Visitor Survey 2007²⁴. This survey suggests that the average spend per person in Manchester was £48.33²⁵. Since it might be expected that day visitors would spend more in London, this does lend some support for the £67.31 estimate for London.

(iii) An overestimate of day visit activity by the LDA Omnibus Survey

The final possibility is that something in the methodology for estimation from the Omnibus Survey has resulted in an unreliable estimate. One possible source of error could have been generated from the fact that the Omnibus Survey did not ask about all leisure day trips – only trips of three or more hours not done on a regular basis. Consequently, there may be a possibility that the Omnibus survey has captured some non-tourism leisure day trips by not using the leisure trips and sub-set of tourism trips methodology.

In spite of the large (and currently unsatisfactorily explained) differences between the surveys results the 2008 Omnibus Survey data is useful as it provides the most recent up-to-date survey of tourism visits to London. Hopefully, in future, further surveys will be able to validate the broad levels of day visitor numbers and spend identified by the surveys covered in this note.

²³ Experian Economics: Regional Planning Service.

²⁴ Tribal, Arkenford and Locum Consulting for the Northwest Development Agency: England's Northwest Day Visitor Survey 2007 – Final Results (October 2008).

²⁵ £48.33 for Manchester compared to £35.35 for Greater Manchester as a whole and £29.14 for the Northwest region as a whole.

Conclusions

This Current Issues Note set out to illustrate the contribution day visitors make to London's tourism industry. Earlier surveys – the GBDVS and ELVS – did not publish the same destination data and were based on different sample sizes. Consequently, it is difficult to estimate the number of tourism day visitors to London. The LDA's Omnibus Survey was produced to enable more timely and accurate estimates of these visitors to London. However, since there are differences between the survey methodologies, previous surveys present data comparability issues when put alongside the Omnibus Survey.

Results from the Omnibus Survey reflect the importance of tourism day visitors to London's economy with London estimated to have attracted 181 million leisure tourism day visits in 2008 with an associated spend of £12 billion. It would be useful to be able to draw upon data for international comparator cities. However, data on day leisure tourism visits to other world cities would appear to be similarly limited.

These day visitor estimates are only intended as an interim solution until national day visitor surveys become available to provide adequate data at the regional level. As a result, the estimates produced here should be treated as experimental in nature.

Survey References

Great Britain Day Visits Survey 2002/03

<http://www.esds.ac.uk/findingData/snDescription.asp?sn=5262>

England Leisure Visits Report of the 2005 Survey

<http://www.esds.ac.uk/findingData/snDescription.asp?sn=5732>

Local Area Tourism Impact Model, London Development Agency July 2009

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