

Measuring Tourism Locally

Guidance Note Three: Undertaking Visitor Surveys

Edition No.: **1.0**

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Office for National Statistics

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Guidance Note Three: Undertaking Visitor Surveys

Sean White, Tourism Intelligence Unit

1. Introduction

This guidance note is produced as part of a series by the Tourism Intelligence Unit at ONS with the aim of providing a consistent framework within which to measure and collect data on various facets of tourism activity. The guidance notes produced to date are:

- Guidance Note 1: Definitions of Tourism
- Guidance Note 2: Local Economic Impact Modelling Approaches
- Guidance Note 3: Undertaking Visitor Surveys
- Guidance Note 4: Tourism Benchmarking and Performance Indicators
- Guidance Note 5: Measuring the Supply Side of Tourism

This particular Guidance note concentrates on approaches to undertaking visitor surveys at the local level. It is crucial that this framework is referred to by users when embarking on local visitor surveys.

A key aim of these guidance notes is to assist in putting in place a consistent set of data relating to the tourism sector at the local authority level. In this sense the guidance seeks to develop a consistent 'bottom up' approach to data collection across the various aspects of tourism that the guidance covers, in this case visitor survey development. Adopting this approach would ensure more comparability across areas which will be useful for planning purposes. It would also make feasible a more consistent approach to local economic impact of tourism analysis to be undertaken if local authorities are collecting tourism data following a consistent framework.

It is important that this guidance is seen in combination with the Partners for England Place Making Charter. The Charter promotes continuous quality improvement and provides a core set of principles (integrate; inform; innovate; invest and improve) to be championed by stakeholders in a destination - recognising that places are unique. By signing up an organisation is agreeing to champion excellent destination management in their area and identify where delivery responsibilities lie.

In summary the key aims of "Place making – a Charter for Destination Management" are:

- Awareness – to influence prioritisation by national and regional bodies, local authorities and businesses

- Clarity – roles and responsibilities of key players
- Focus – on destination management and place-shaping
- Partnership – encourage and foster collaboration in a fragmented sector
- Improvement - drive continuous quality improvement

The guidance notes produced here can contribute to this drive towards quality improvement and given the move towards localism these guidance notes on measuring tourism locally are particularly timely.

2. Why undertake a local visitor survey?

As well as highlighting your destination's strengths and the areas requiring improvement, the visitor survey can provide local tourism organisations with a sound basis for monitoring performance and for future marketing and business development. Some of the ways it can achieve this (depending on the questions you ask, the people you speak to and the type of research you carry out) are by:

- identifying the profile and origin of visitors
- examining their behaviour once at the destination
- evaluating the effectiveness of marketing activities
- assessing the quality of service and levels of visitor satisfaction
- testing reaction to new or proposed developments, services or promotional materials.

Carrying out visitor surveys should not be seen as a one-off exercise. It's important to carry out these surveys on a regular basis (ideally each year or every two years), to build up an ongoing and comparable picture of satisfaction with your destination. More importantly, this will allow you to monitor visitor reaction to any changes made at your destination as a result of carrying out visitor research and identify trends.

3. How to conduct a visitor satisfaction survey:

The following section looks at 'The 14-point plan' for conducting and managing your own visitor satisfaction survey. By following it you will hopefully be able to conduct your own survey to produce credible, usable and comparable research and avoid many of the common pitfalls that can occur when carrying out market research.

Before you start the project...

Depending on the budget available you may decide that you would prefer to commission a professional market research agency to carry out your survey.

You can get helpful advice and research services from the English Tourism Intelligence Partnership (ETIP) and the Tourism Intelligence Unit at ONS. Contact Sean White at sean.white@ons.gsi.gov.uk

However, for many destinations, commissioning research from an agency is too expensive and the choice then is to try to do the work themselves. The 14 point plan, given below, sets out the steps that need to be followed in carrying out visitor satisfaction surveys.

3.1 Creating a survey plan

The survey plan is a list of answers you want to see coming from the research rather than a list of questions. Consider some of the following areas and think about the services and facilities in your own destination before you go any further with your research. Things that you may want to consider include:

- Think about the type of information you need to gather and why you want to carry out the research. Is there a particular issue in your destination that you want to know more about; e.g. parking facilities, facilities for children, signage, shop opening times or standards of street cleanliness?
- Surveys can measure both negative and positive visitor reactions; is there something you think works well in your destination? What do visitors think about this? You may have recently implemented a new bus service or opened a new shopping area in your destination – is this useful for visitors?
- Who will be looking at this research? What are they expecting you to report on; are you trying to build a case for funding, or perhaps gather evidence for a new facility, or a change to existing services?
- Talk to your colleagues to gather their ideas. If you can, look at examples of visitor satisfaction surveys and reports from other destinations.
- Do you want to be able to repeat this survey to build up visitor trends over time?
- What basic information do you need to know about your visitor? Consider things like age, transport used, length of trip, frequency of visit to your destination, area of region or country lived in, number of people in the party.

Once you have thought about what you want to achieve with your research you are ready to go on to the next stage in the plan.

3.2 Deciding on the most appropriate survey type

It's now time to think about the most appropriate survey type (or types) to use. There are two types of market research:

Quantitative research

Collecting information from respondents via a set of questions on a questionnaire. Responses can be collected either through an interviewer talking directly to the respondents (either face to face or over the telephone).

By respondents being sent a questionnaire in the post or picking one up themselves, then completing and returning it to you.

Qualitative research

This type of research is structured and may contain deliberate questions, but the overall pattern would be a discussion rather than gathering answers to a set questionnaire. The success of this method depends very much on the skill of the interviewer.

Generally, quantitative research is used for visitor satisfaction surveys – usually face to face interviews conducted by an interviewer. The advantages of this method of research are:

- Personal contact with the respondent increases the number of interviews achieved (response rate).
- You are better able to control who the interviewer talks to, and therefore talk to a more representative group of people.
- Verbal explanation can be given by the interviewer if necessary and the questions you ask can therefore be slightly more complex.
- Misunderstandings can be reduced as the interviewer can gauge how the respondent has interpreted a question and clarify if necessary.
- Unhelpful or inadequate replies from the respondent can be probed by the interviewer.
- Missing answers (blanks) are generally avoided as few people refuse to answer questions put to them, but may have left them blank when filling in the questionnaire themselves.
- You have control over when the respondent is approached, normally during their visit when their experience is still fresh in their memory rather than two weeks after a visit when they receive a questionnaire from you in the post.
- This method allows a considerable amount of information to be collected quickly and accurately by well-trained staff.

There are a couple of disadvantages that you should be aware of:

- This type of survey can be subject to interviewer bias, such as the interviewer not selecting the respondent randomly. Trained staff and strict sampling can minimise this problem.
- This type of research can still be costly to implement.

3.3 The sampling method and size

When you organise a questionnaire survey you are normally dealing with samples of population. In this case the population are all the people who visit your destination and the sample are those who are selected for interview. The accuracy of the data you collect and therefore the conclusions you are able to draw from your research will depend on how you select your sample.

A basic knowledge of sample design will be necessary so that you can plan a survey and the following notes should help you do this. However, it may be useful to seek help on sample design from research experts in your area eg the RDA's, Tourist Boards or from the TIU at ONS.

In basic terms, sample design looks at WHO, WHEN and WHERE

- WHO you interview
- WHEN the interview takes place
- WHERE the interview takes place.

A sample framework needs to be created to ensure that a representative sample of visitors is interviewed during the survey. The size of your destination and the depth to which you want to analyse your data will determine the overall number of people you interview (the sample size).

Generally, to get accurate results from your survey, you should aim to interview a minimum of 400 people.

To achieve a representative sample (by talking to a cross-section of visitors) you need to break down your visitors into groups according to:

- day visitors to your destination
- overnight visitors to your destination
- a good cross-section of age groups (this is usually controlled with bands of ages for example 6-24, 25-34, 35-44, 45-54, 55-64 and 65 years or more)
- male or female visitors
- area of residence; e.g. visitors living within a radius of 20 miles from your destination and visitors living more than 20 miles from your destination
- method of transport used to travel to destination.

You will also need to interview a cross-section of visitors on each day of the week (including the weekend) to ensure that your sample is representative. Finally, you must make sure that you have interviewers positioned at a variety of places within your destination, ideally at places used or passed by visitors and that interviews are carried out throughout the day.

Once you have worked out the visitor sub-groups you want to interview and how many people you will interview in these sub-groups you will have constructed a 'sample framework' for your survey. Each interviewer working on your survey will be instructed to interview a number of people from each of the sub-groups. This is known as 'quota sampling'. This is the method normally used in such visitor surveys but note that this method is not strictly representative of the population – an equal probability random sample would be needed for this which is subject to analysis of sampling error. The Tourism Intelligence Unit at ONS can provide assistance and advice on how to measure the sample error, contact sean.white@ons.gsi.gov.uk. The interviewer's aim is to fill each quota. Once a quota has been filled, any subsequent respondent from that sub-group can be thanked for their assistance but will not need to be interviewed at length.

3.4 Looking at the resources needed – financial, human and time

At this point in your plan it is important to look at the resources you have available to you in terms of finance, time and human resources to make sure that your plans are not too ambitious. The main cost is likely to be staff time, not just in terms of interviewing, but also in planning and preparing the survey, in training and being trained and in carrying out the analysis work.

How much money you spend on the survey will, of course, depend on the amount and nature of the information you wish to collect. Before finalising your calculations you should consider whether all the necessary skills for the project exist within your organisation or whether you will need to buy in expertise or additional help from outside. This will therefore add to the overall costs of the project.

3.5 Analysis methods

Before writing your questionnaire it's important to think about the method you will use to analyse the results of the survey. Again, this is an area where it is useful to seek help from research experts in your area or externally. Generally, surveys are analysed with the help of a computer

software package. Analysing the survey data involves inputting the information collected on the questionnaires into the package so that the answers are aggregated together to produce a set of data.

There are two main types of software that can be used for this task:

- statistical packages; e.g. SPSS, SAS
- spreadsheet packages; e.g. Microsoft Excel.

Inputting the information from the questionnaire involves 'coding' the answers that the respondent has given. This simply means that answers are converted to a single digit code. Coding is often printed on the questionnaires and takes the form of a list of possible responses to a question with a number alongside each response. For example, the coding for a simple question which required either a 'YES' or 'NO' response would be YES=1 and NO=2.

Sometimes questions can bring more than one response. For example, if a respondent was asked which days of the week they usually visit the shopping centre at your destination they could answer anything from 'never' to 'every day of the week'. In this case the interviewer may have to tick more than one box for this question. This is known as multi-coding or multiple response.

Similarly, questions where the respondent's opinion or motives are being asked (known as open-ended questions) do not have a list of possible answers (pre-coded questions) and have to be coded very carefully.

3.6. Questionnaire design (and coding)

This is the crucial part of the project and mistakes made here could cause serious problems at the analysis and reporting stages.

Here are a few points to consider:

- The questionnaire needs to be well set out and the spaces and boxes for entering the answers should be of a good size and positioned well.
- The questions should be phrased in a simple way which can easily be understood by the respondent.
- Keep questions short and avoid jargon.
- Read over the questions and check whether they can be misinterpreted. For example, the question 'Have you visited the children's play area recently?' doesn't mention a specific time period so it is up to each respondent to interpret the word 'recently'. This could be a visit made in the last week, month or year.
- Open-ended questions (where the opinions or motives of the respondent are being sought) are difficult to answer and difficult to code and analyse. It's a good idea to limit the number of open-ended questions to about two or three per survey.
- If you would like to assess attitudes or views on a certain topic and don't want to use an open-ended question consider using a scale. An example of this would be, 'How would you rate the cleanliness of the public toilets?' with the possible options being 'very good/good/average/poor/very poor'.

- Take care when wording personal or sensitive questions; it's better to say, 'Please could you tell me your age on your last birthday?' and allow the respondent to point to an age band printed on the questionnaire than to ask them directly, 'How old are you?'
- During a face to face interview it's possible to show the respondents pictures or maps if it will help them to answer the question more accurately. These are known as 'show-cards'. Show-cards can be a useful interviewing tool, but to keep the interview simple for the interviewer it's best to use them sparingly.
- Think about the flow of the questions. Put questions about similar topics together.
- Do not make the questionnaire too long – a successful face-to-face interview lasts no longer than ten minutes.

3.7 Carrying out a pilot survey

Once you have produced your questionnaire it's worth carrying out some test or 'pilot' interviews to make sure that it is understandable, not too long, or produces answers you haven't allowed for on the pre-coded questions.

The pilot could be carried out amongst colleagues at work, or if budgets allow, actually with visitors at the destination. After the pilot, it's important to assess how the questionnaire worked and make any necessary changes to wording or question order. It may be necessary to carry out another small pilot if the questionnaire has changed significantly.

3.8 Printing the questionnaire

Each interviewer will need a supply of questionnaires. Make sure that you have an adequate stock of questionnaires.

3.9 Training survey interviewers

Your survey interviewers need to be capable of approaching strangers and requesting their participation in the survey, following the survey instructions, and recording information accurately. It's important to make sure that they are briefed about the project. During the briefing it is important to make the interviewers feel part of the project by explaining why the survey is being carried out and what you hope to learn from it. It's also a good idea to make sure that everyone is clear about where they will be interviewing (the location or locations in your destination), when and where to return their completed questionnaires, who to call if they experience problems. Most importantly, talk the interviewers through the questionnaire question by question and allow them to become familiar with it.

3.10 Collecting the data

This should be one of the easiest stages in the whole survey process if you have planned the survey well. It's important that the interviewers are provided with the right equipment to do the job:

- clipboard or computer tablet
- supply of questionnaires
- maps and showcards (if you are using them)
- pencils, pencil sharpener, rubber
- identification letter or official badge (to prove that they are conducting an official survey on behalf of your organisation)

It's a good idea to have someone on duty at all times during the interviewing period to deal with any problems or queries from the interviewers.

3.11 Analysis and evaluation

A common source of error at this stage can be inaccurate data entry. It's therefore important to carry out a quality check on the data entry. This can be done by looking at about ten per cent of the questionnaires and checking their accuracy against the entered data. Obviously, if many errors are found the entire data set will need to be checked.

There are many agencies specialising in data entry and therefore sub-contracting this stage of the project may be possible if you have available budget.

3.12 The final report

After the data has been analysed it's good practice to write up the results of the survey in the form of a report. Before writing the report think again about who will be reading it and what you wanted to achieve with the survey. Include a copy of the questionnaire and any showcards used in the appendix of the report.

3.13 Making sure issues are resolved

Although this seems obvious, don't forget the reason for carrying out your research in the first place was to monitor the views of visitors to your destination. If the results of the survey show that there is room for improvement in some of the services and facilities offered in your destination, then the next stage of the process is to begin to look at ways in which things can be changed.

3.14 Monitoring changes made as a result of survey findings

Finally, if you do implement changes at your destination it's important to monitor how your visitors feel about them which can mean undertaking the survey process again.

Appendix 1: An Indicative Visitor survey

Core Questions

This survey only includes core questions which could be added to if more information is required on, for example seaside or city-based visitors. The questions could, therefore, be amended to suit the attributes of a particular destination.

Section A. Purpose of trip

Question 1: What is the main purpose of your visit to this area?

- Holidays, leisure and recreation
- Visiting friends and relatives
- Education and training
- Health and medical care
- Religion/pilgrimages
- Shopping
- In Transit
- Business and professional
- Other

Question 2: If on holiday or short break, is this your:

- Main holiday this year?
- Second holiday this year?
- Third or more holiday?

Question 3: Which of the following groups would you place yourself in?

- Local resident of this area
- Day visit from home outside this area
- Day visit whilst staying outside this area
- Independent visit of more than 1 day
- Inclusive package holiday
- Other (specify):

B. Details of visit

Question 4: If staying overnight, what is the main type of accommodation used?

- Hotel/motel/inn
- Guesthouse
- Bed and Breakfast/farm accommodation
- Rented self-catering
- Caravan
- Static owned

Core Questions

- Static not owned
- Camping
- Timeshare
- Youth Hostel
- Homes of friends or relatives
- Second home
- Other
- If applicable, what is the name of the place they are staying

Question 5: How would you rate the quality of your accommodation?

- Excellent
- Good
- Average
- Poor
- Very poor

Question 6: How many nights are you staying?

- In this area?
- Away from home in total?

Question 7: What is the country and postcode of your normal home/place of residence?

- Country
- Region
- Postcode

Question 8: What was the main method of transport used to travel to this area?

- Air transport
- Rail transport
- Bus or coach
- Organised coach tour
- Water transport
- Car (own, friends, firms)
- Car (hired)
- Motorcycle
- Bicycle
- Lorry/truck/van
- Walk/hiked
- Other

Core Questions

Question 9: Have you stayed overnight in this area on holiday before?

Yes or No response (If respondent answers no go to question10)

If yes,

a) When did you last holiday here?

- Within last month
- Within last year
- Within last 2 years
- Within last 5 years
- Within last 10 years
- Longer

b) How many times have you holidayed here?

- Once
- 2-5 times
- More than five times

Question 10: Have you been on a day visit to this area before?

Yes or No response (If respondent answers no go to question11)

If yes, when did you last visit?

- Within last month
- Within last year
- Previous year
- More than two years ago

Question 11: How did you find out about this area?

- A previous visit
- Friends/relatives
- Tourist Information Centre
- Newspaper/magazine article
- Newspaper/magazine advertisement
- Website (Please state which one)
- Tourist brochure/leaflet (Please state which one)

Core Questions

Question 12: What were the main characteristics of the area that made you want to visit here? (tick one or more)

- Beach facilities
- Accessibility
- Historic interest
- Peace and quiet
- Sporting facilities
- Entertainment and recreation facilities
- Quality of accommodation
- Scenery and countryside
- Particular activities
- A Particular event (please specify)
- Friendliness and hospitality of locals
- Other (specify):

Question 13: Please rate the following destination features on a scale of 1 (Very poor) to 5 (Excellent) by circling the appropriate number

- | | |
|-------------------------------------|-----------|
| – Indoor/wet weather facilities | 5 4 3 2 1 |
| – Places for families to visit | 5 4 3 2 1 |
| – Places for adults to visit | 5 4 3 2 1 |
| – Shopping | 5 4 3 2 1 |
| – Evening entertainment | 5 4 3 2 1 |
| – Tourist accommodation | 5 4 3 2 1 |
| – Signposting | 5 4 3 2 1 |
| – Ease of being able to walk around | 5 4 3 2 1 |
| – Surrounding countryside | 5 4 3 2 1 |
| – Restaurant/eating facilities | 5 4 3 2 1 |
| – Public transport | 5 4 3 2 1 |
| – Parking facilities | 5 4 3 2 1 |
| – Overall appearance | 5 4 3 2 1 |
| – General cleanliness | 5 4 3 2 1 |
| – Value for money | 5 4 3 2 1 |
| – Cleanliness of beach | 5 4 3 2 1 |
| – Quality of seawater | 5 4 3 2 1 |
| – Beach facilities | 5 4 3 2 1 |

Core Questions

- Access to beach 5 4 3 2 1
- Sporting facilities 5 4 3 2 1

Question 14: Is car parking a problem?

Yes or No response (If respondent answers no go to question15)

If yes, why ?

- Too far from town
- Too expensive
- Insufficient spaces
- Badly signposted
- Insufficient disabled provision
- Other (specify):

Question 15: Please tell me roughly how much you will have spent or will spend on yourself or on the behalf of others in your group TODAY on the following:

- Accommodation
- Total travel costs (to and from the destination, and during the trip)
- Entrance fees / tickets
- Food / drink (for immediate consumption on the premises)
- Other food and drink (e.g. take-away / confectionery items / grocery items)
- Buying clothes
- Other shopping
- Hiring equipment
- Anything else (please specify)

Question 16: Please indicate your age group

- A 15 – 24
- B 25 – 34
- C 35 – 44
- D 45 – 54
- E 55 – 64
- F 65 +

Question 17: Please indicate your marital status

Core Questions

- A Single
- B Married
- C Widowed
- D Divorced/separated

Question 18 Which category best describes you?

- A In full-time employment (30+ hours per week)
- B In part-time employment (<30 hours per week)
- C Student
- D Unemployed
- E Retired/Pensioner
- F Housewife/husband

If employed full- or part-time:

Which industry/company

Job title

Are you the main wage-earner?

Yes or No (If No go to question 19)

If the main wage-earner is employed full- or part-time:

Which industry/company

Job title

Question 19: Who is with you? (insert number of people where appropriate)

- Nobody
- Husband/wife/partner
- Other adults (15+) from own household
- Any children under 15 from own household
- Adults 15+ from another household
- Children under 15 from another household