

# **Understanding outdoor recreation in a changing data landscape**

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# The historical context

Early attempts to measure demand and patterns of outdoor recreation from the 1970s onwards – very much focused on individual sites – face-to-face interviews and self-completion questionnaires.

At a national and also regional level, some in-home studies with representative samples of the population took place during the 1970s.

The 1980s and 1990s witnessed a number of studies which looked more broadly at leisure time activities:

- Involvement of several organisations as funders
- Led to compromises in terms of coverage and level of detailed analysis

Dissatisfaction with the outputs from these studies led to consideration of designing bespoke surveys which were more focused in coverage:

- Funded by a single client, or
- Primary client with secondary support from other organisations

Clear benefits of this approach, fewer compromises in coverage and definition, more opportunities to collect detailed information and produce outputs which met client's needs.

# Where we have got to

In the last 15-20 years, this recognition of the benefits of this ‘bespoke’ approach has resulted in the design and repetition of major studies in the three constituent parts of Britain:

- Scottish Recreation Survey
- Monitoring Engagement with the Natural Environment (MENE)
- Wales Outdoor Recreation Survey

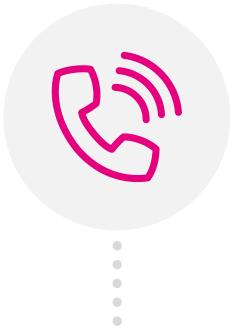
Each of these surveys based on a representative sample of the population, interviewed across the year:

- Data collected on key measures of demand and participation
- Focus on specific topics of interest to aid understanding
- Suite of outputs designed to meet differing needs of clients and interested parties
- Established as the definitive sources of information on outdoor recreation

So, why is there a need to review what should be done in the future?

# Practical issues to consider

From the perspective of survey methodology, declining response rates are a major concern for the market research industry:



## Telephone surveys

Number recognition and reduction in use of landlines



## In-home interviews

More difficult to access potential respondents

Variable response rates also present a challenge in producing representative samples of the population.

The effective use of online surveys is dependent on having well-managed panels of consumers who have 'signed up' to participate in surveys.



How representative will such a panel be of the population as a whole?

## Practical issues to consider (continued)

Pressure on the financial budgets of clients is a common theme – both within the public and commercial sectors – can the same level of insight and understanding be delivered for less than is currently being invested? Need to be ‘future-proofing’ the surveys.

Also a desire for quicker access to the data in order to provide more actionable insight – a major push towards ‘in the moment’ data gathering.



# Are online surveys the solution?

Despite recognised challenges in terms of sample coverage, there has been a clear movement towards online surveys – primarily justified on the basis of costs.

If existing surveys are being transitioned, issues to consider include:

- | The survey effect will alter some of the key measures of participation or demand
- | Will demographic groups of particular interest be under-represented?
- | Increasing use of mobile devices for completing surveys and so questionnaire design has to reflect the format restrictions of this platform – 81% of British population now have access to a smartphone
- | Questionnaires have to be shorter – ideally no longer than 10 minutes online

Mixed mode survey approach appears to represent an acceptable compromise for large scale population surveys – combining online with either face-to-face or postal communications, both in terms of sampling and data collection.

Provides opportunity for increasing respondents' engagement and supplementing survey data with imagery, vox pops.

# Site-based surveys

## Particular benefits of online approach

The increasing use of smartphones and the development of related GPS, Wifi and Bluetooth technologies makes it possible to serve survey invites to consumers who have visited a specific location, either at the time of the visit or at some point immediately afterwards.

A number of particular benefits, including:

- Fast answers
- Better recall of experience
- More accurate responses, less dependent on recall
- Supplement with additional information

Variety of means of undertaking such surveys:

- Promoting an SMS number to access the survey
- QR code available for scanning
- In app surveys
- Proximity technologies – push survey invites to visitors
- Location targeting using Google surveys

Must remember that sample will be self-selecting and use of such devices may dissuade certain types of visitors such as those who are less tech-savvy, frequent visitors

# Passive measurement – potential benefits

Passive data collected from technology such as mobile phones or activity trackers provide potential opportunities to replace or enrich survey data

## Potential benefits

Data is collected in real time.

Data may be more comprehensive than sample based data (for example, 24 hours' coverage, all locations within defined geographic area).

Behavioural data from devices can be more accurate than claimed/ self-reported data – where there are issues regarding recall, over-claiming due to social desirability.

Passive data collection imposes less of a burden on recreation participants than active approaches.

# Passive measurement – potential issues

## Issues to consider

Coverage may be biased e.g. mobile phone users, users of particular activity tracker brand only.

Technical issues may impact on feasibility for certain geographic issues e.g. in locations with no mobile phone coverage, where mobile phone cell sizes are larger than area of interest.

Data available on individual users is limited making it difficult to accurately define and identify specific population or user groups.

Limitation on the information available means that passive data is unlikely to meet all needs.

'Big brother' data protection and privacy concerns.



# Case study

## Forestry Commission Pilot – Sherwood Pines Forest Park and Thetford Forest

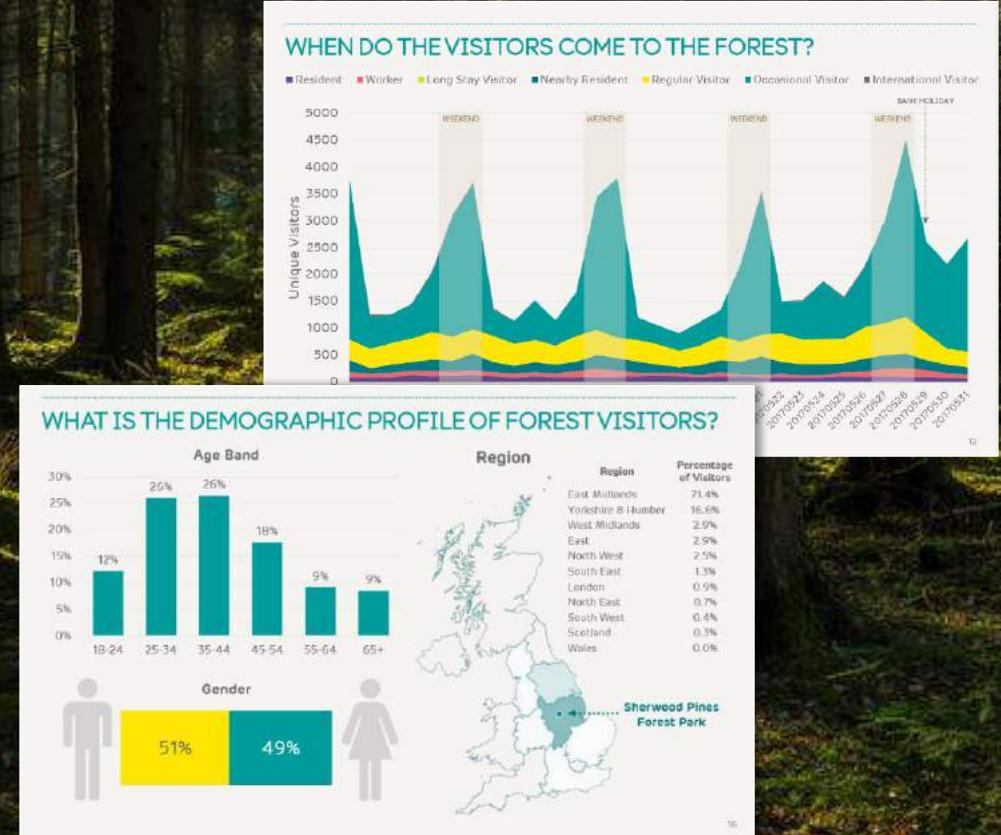
A Kantar TNS and EE pilot to test the potential of mobile data as an alternative to traditional data collection methods.

Focused on visits in May 2016 then repeated for validation for May 2017.

Sought to provide data on:

- Volumes of visits and unique visitors
- Timing of visits
- Dwell time
- Visit origin
- Some visitor demographics (age, gender, Mosaic group)

Data weighted to make it representative of visit taking universe – not just EE customers.



# Case study (continued)

## Forestry Commission Pilot – Sherwood Pines Forest Park and Thetford Forest

### Traditional versus mobile approaches



#### Pros

- Data based on 24/7 rather than short sample time periods
- Data for entire site (as defined in set up) rather than just sampled locations such as car parks
- Much more granular data especially in relation to times of visits, origin of visitors, unique visitors versus visits



#### Cons

- Difficulties matching mobile phone cells to forest boundaries meant parts of forest excluded or nearby areas outside of forest included in data
- Difficulties when a busy road or railway line cross forest
  - how to distinguish/ discount these people?

# Social media analytics

By digging deep into social media conversations, it is possible to understand what the population is saying, identify pain and pleasure points and uncover trends over time. This type of analysis can provide a number of types of insights including:

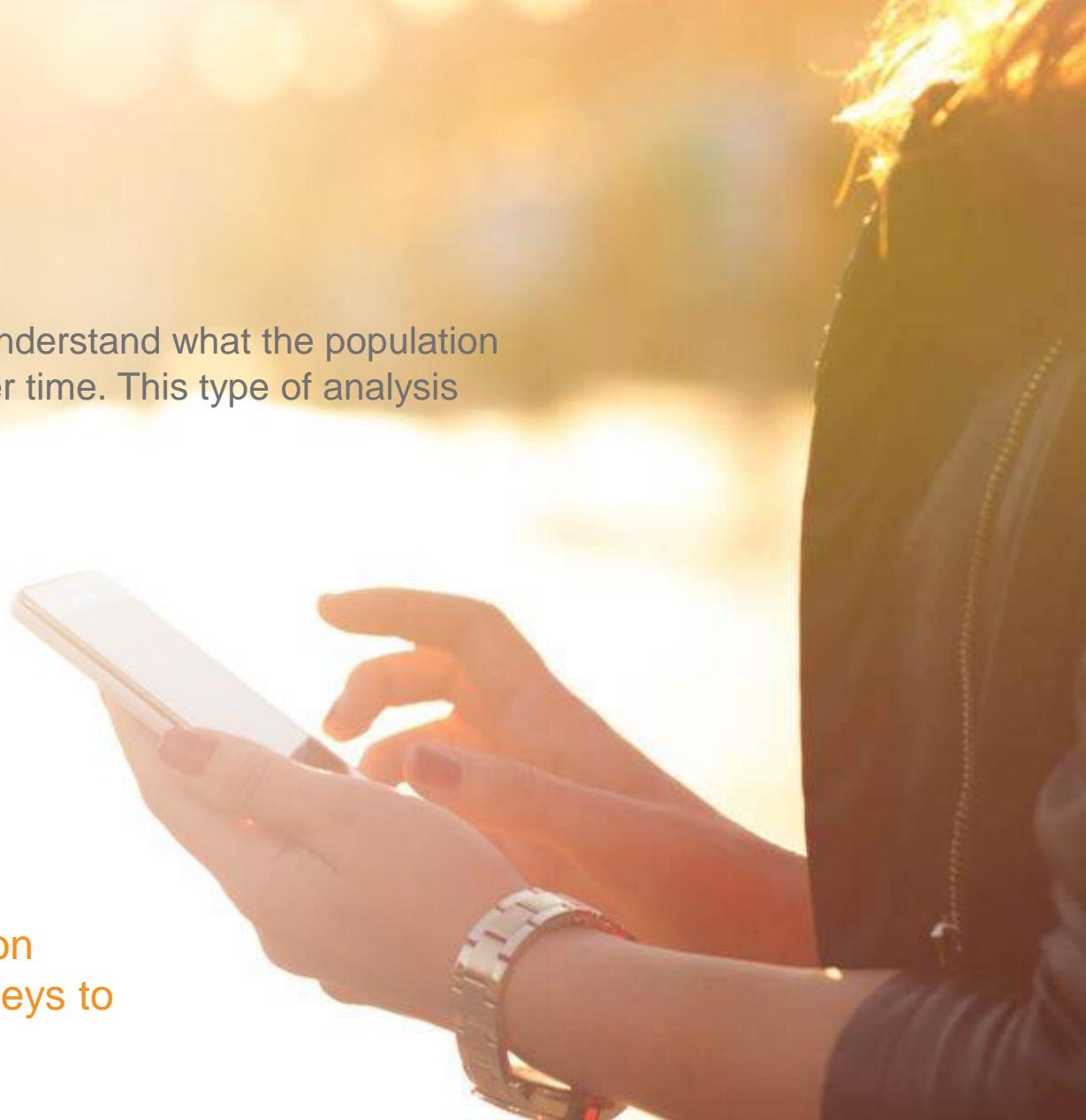
The levels of online discussion relating to specific topics of interest e.g. outdoor recreation, volunteering, concern for the environment

Key themes that are emerging

The direction of discussion – who is initiating and who is responding?

Assessments of the tone of conversations (positive/negative)

While social media analysis is unlikely to meet all information requirements, it has the potential to be used alongside surveys to enhance understanding on topics of interest



# Case study

## Scottish Government – Organ Donation Scotland

A campaign to persuade Scots to view organ donation as an important social responsibility, sign up to the Organ Donor Register and share their commitment to donate via social media.

This campaign required a new approach to evaluation, combining traditional survey based approaches to track key metrics and social media analytics to provide qualitative context on a quantitative scale.

Kantar TNS analysed social media conversations on two key platforms – Facebook and Twitter.

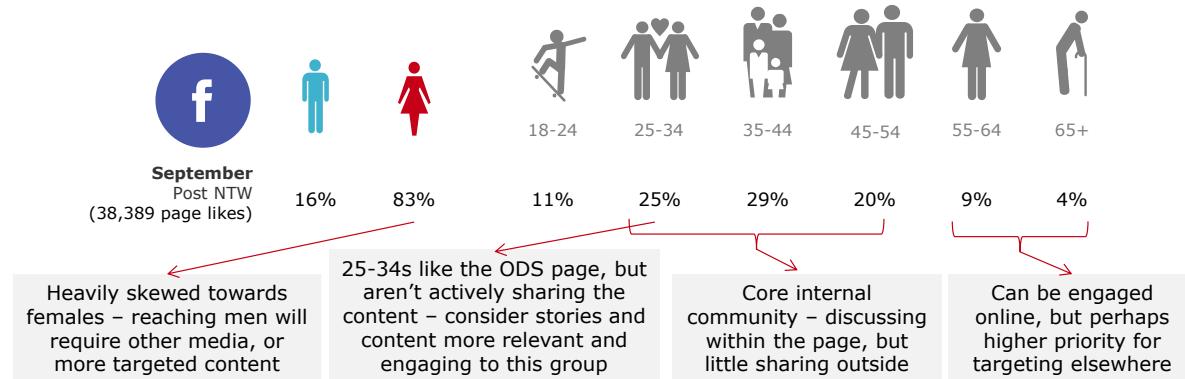
Ultimately this ‘survey and social’ approach helped ODS to optimise its communications and targeting to drive registrations and save lives.



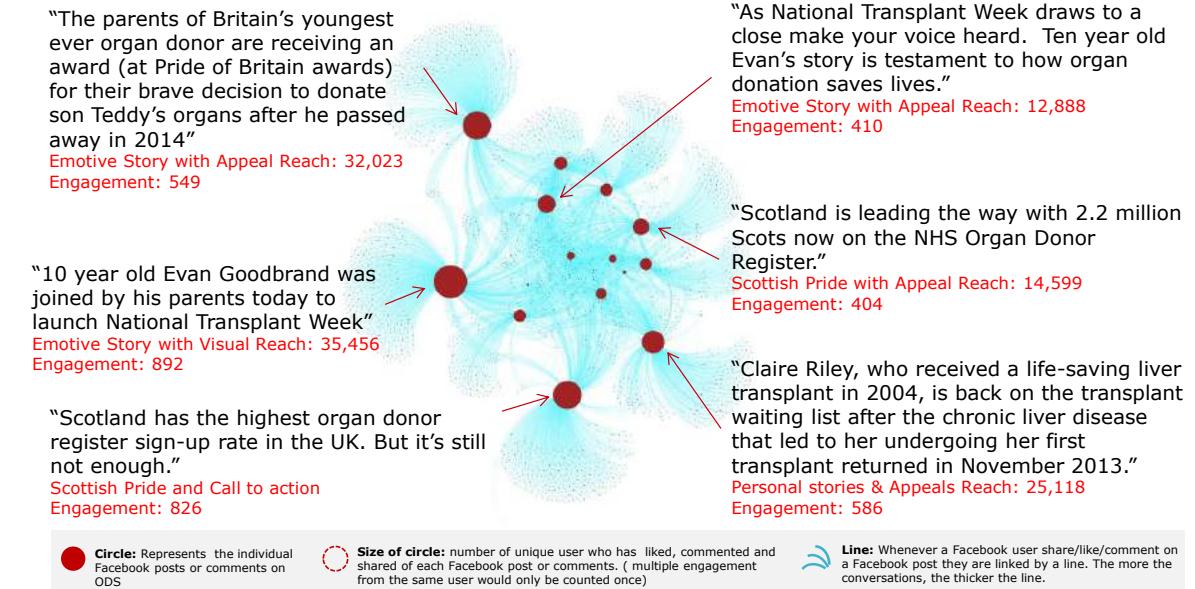
# Case study (continued)

## Scottish Government – Organ Donation Scotland

### Profile of ODS Facebook page likers



### Conversation map for National Transplant Week activity on ODS Facebook page



# So what will the future look like?

At the individual site level, taking advantage of technological developments to move towards greater use of 'in the moment' data collection – both from surveys but also from passive measurement techniques.

At the general population level, a move towards online surveys but within the context of a multi mode approach:

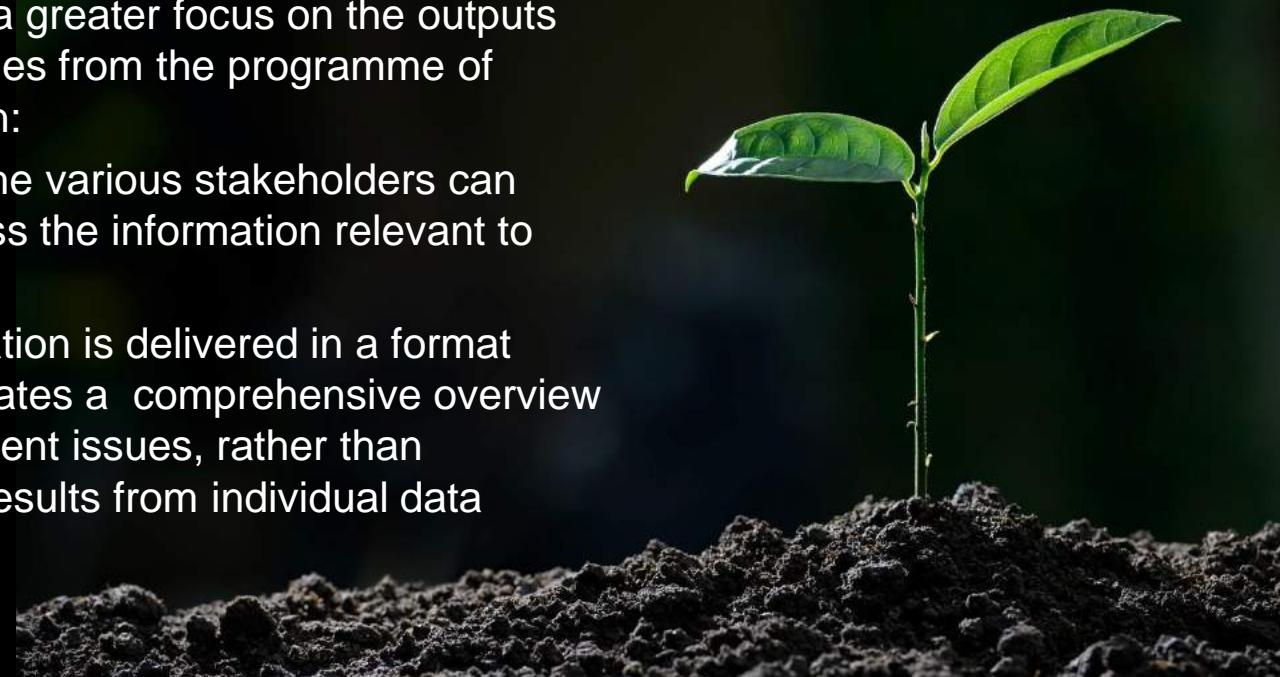
- For ensuring that the recruitment of respondents is as representative as possible
- For maintaining some degree of consistency in relation to delivering trend data

Social media analytics will be utilised more regularly – not in isolation but as an integral

part of a data collection programme – to provide added insight and understanding to both survey data and other operational sources of information.

There will be a greater focus on the outputs and deliverables from the programme of data collection:

- To ensure the various stakeholders can easily access the information relevant to their needs
- The information is delivered in a format which facilitates a comprehensive overview of the pertinent issues, rather than displaying results from individual data sources



# Thank you