

Valuing Activities

Final Report

7th October 2015



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Background and method



Background

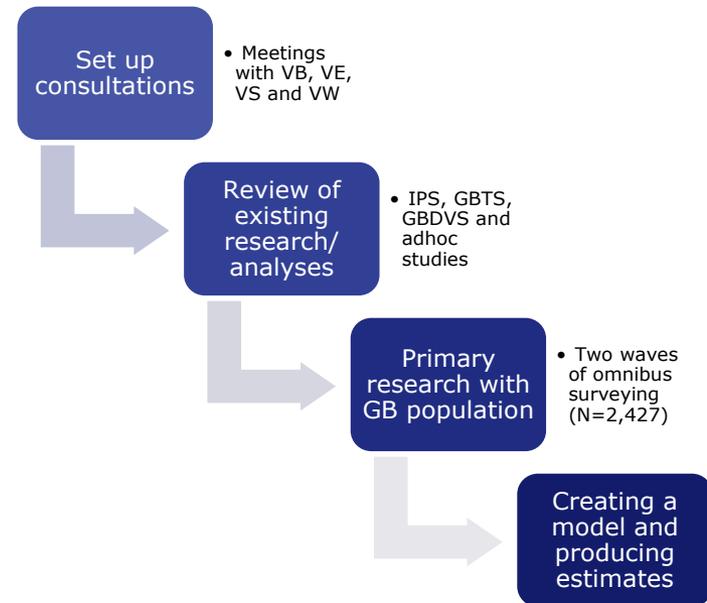
- The main surveys of overnight and same day tourism (IPS, GBTS and GBDVS) record details of the activities undertaken on tourism trips taken in the UK and total expenditure during these trips.
- It is therefore relatively straightforward to measure the volumes of trips taken which involve a given activity and total expenditure during these trips.
- However it is not straightforward to assess whether an activity undertaken was the reason for taking the trip, versus one of a number of drivers, or how much of the trip expenditure was directly related to participation in this activity.
- To date there has been no agreed method to estimate what proportion of overall trip spending can be considered to have been generated by a particular activity. This means that different organisations use different methods to place an expenditure value on different types of activity tourism. There is no consistency and some of the estimates produced may be inaccurate.
- As such VisitEngland, VisitScotland and Visit Wales recognised that there was a need to develop a consistent approach that can be used to calculate spend attributable to activities undertaken during tourism trips.
- This approach would allow for the production of more accurate, consistent estimates including both overseas and UK visitors and both same day and overnight tourism trips.

Note on terms used in report

- This report includes the following terms which are defined as follows:
 - *Expenditure on trips including an activity* – the total amount of money spent on all elements of a day or overnight visit which at any point included participation in a particular activity.
 - *Attributable expenditure* – estimate of the amount of money spent on day or overnight visits which were motivated by being able to participate in a specific activity when the decision was made on whether to take the trip.
- Note that attributable expenditure is not exclusively related to the activity itself as visits motivated by a particular activity are likely to have also included expenditure on other areas (for example overnight accommodation and food and drink).
- Similarly direct spending on an activity (e.g. on tickets / entrance fees) may not be attributable as people may spend money to take part in activities which in no way motivated them to take the visit (e.g. they may not have known that the activity was available, or may have changed plans due to better or worse weather than expected).

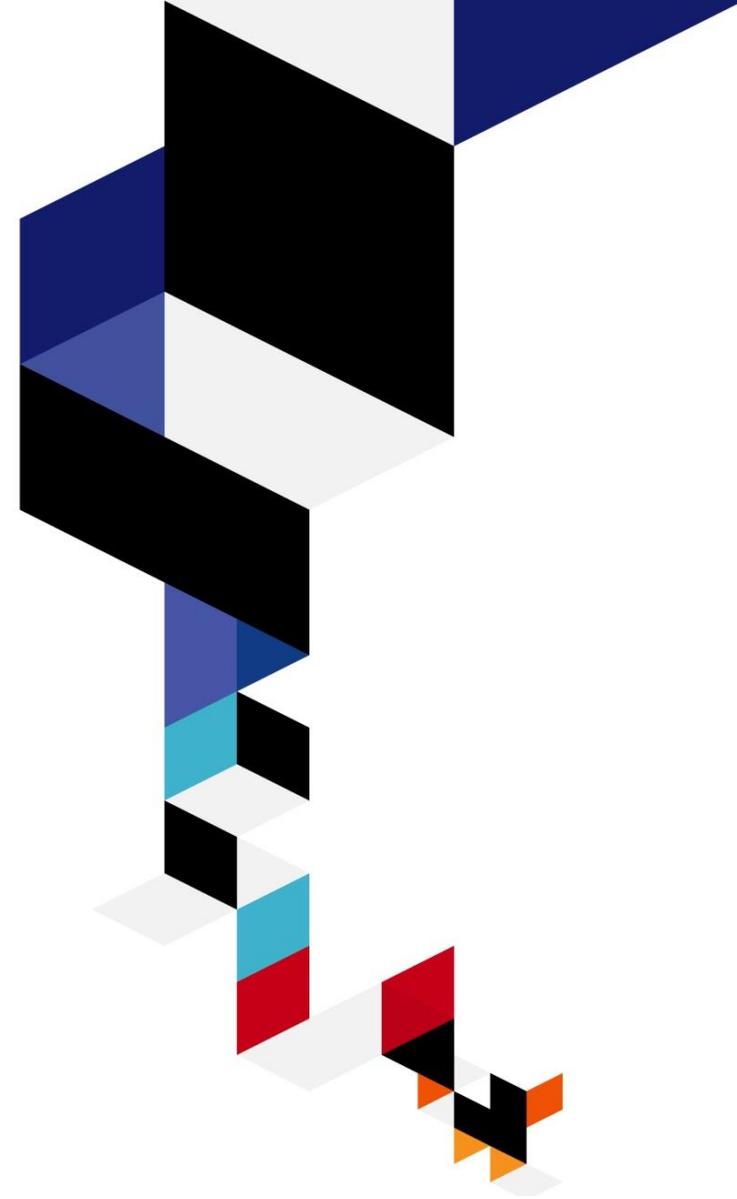
Developing a consistent approach

- TNS were commissioned to undertake this exercise which used a combination of primary research and analysis of the IPS, GBTS and GBDVS data to create a consistent approach to estimate expenditure attributable to activities undertaken during tourism trips.
- As illustrated on the right, this exercise included consultations with each of the national tourist boards, to discuss potential approaches and agree the activities to be included in the exercise, and a survey of over 2,400 GB residents.
- The outputs from this exercise area as follows:
 - This report providing accurate estimates of expenditure for an agreed set of activities and other key results.
 - A technical summary outlining the approach developed (see Appendix 1).
 - An Excel 'tool' which can be used to update estimates using the latest IPS, GBTS and GBDVS data as it becomes available (see Appendix 2).



Results of GB population survey

2,427 online interviews undertaken on TNS online omnibus between w/b 9th and 16th February 2015



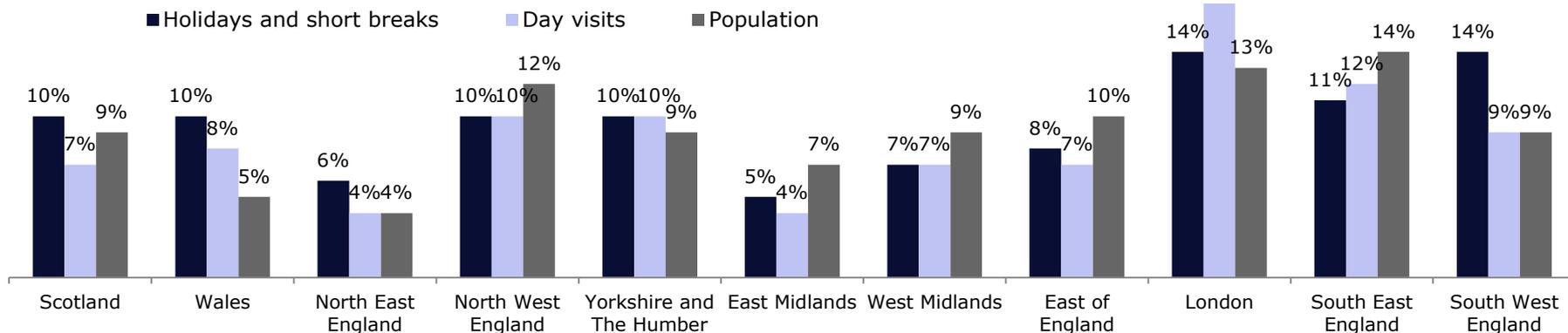
Holidays, short breaks and day visits taken in the last 12 months

- The population survey (undertaken in February 2015), recorded that 68% of the adult population had taken any domestic holidays or short breaks in the last 12 months while 66% had taken any 3 hour+ day visits.
- As shown below destinations visited broadly reflected the population spread with some small variations (e.g. higher proportions taking day visits to London & higher proportions taking overnight visits to the South West).
- Also, as shown on the right, both holiday and day visit taking levels were highest amongst people with children in their household and the more affluent socio-economic groups.

Table 1 – Domestic visit taking in last 12 months by presence of children and socio-economic group

	Holidays or short breaks	Day visits
Children in household	74%	75%
No children	64%	63%
ABC1	74%	71%
C2DE	62%	60%

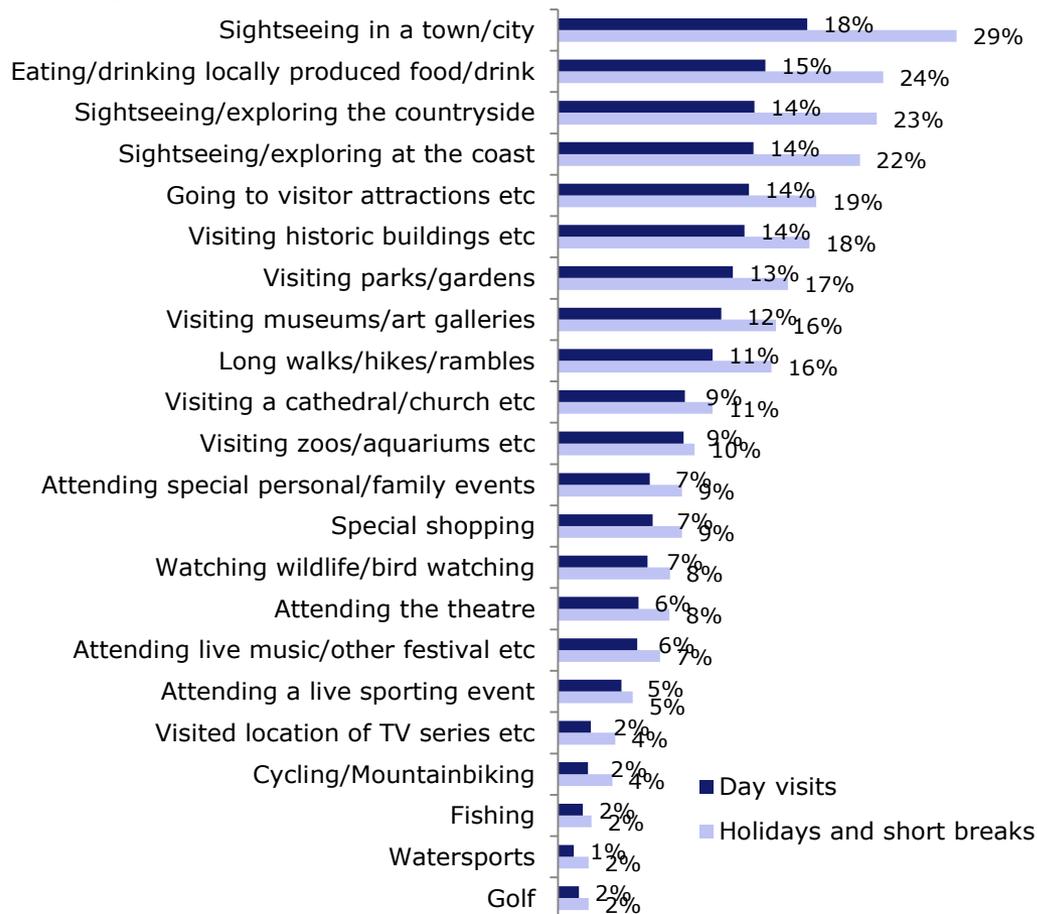
Figure 1 – Regions visited in last 12 months for domestic holidays/short breaks or day visits



Activities undertaken on holidays, short breaks and day visits in last 12 months

- Proportions of the population taking part in the activities listed during domestic holidays/breaks and day visits varied significantly with the highest proportions sightseeing in towns and cities while much lower proportions took part in 'niche' activities such as golf, watersports and fishing.
- For each activity higher proportions had participated during holidays/short breaks than on day visits.
- Overall 41% of the population had not undertaken any of the activities asked about on a domestic holiday and 42% had not undertaken any of the activities during day visits.
- Further analysis of results regarding activities undertaken is provided in Appendix 3.

Figure 2 – Activities undertaken in last 12 months during domestic holidays/short breaks and day visits

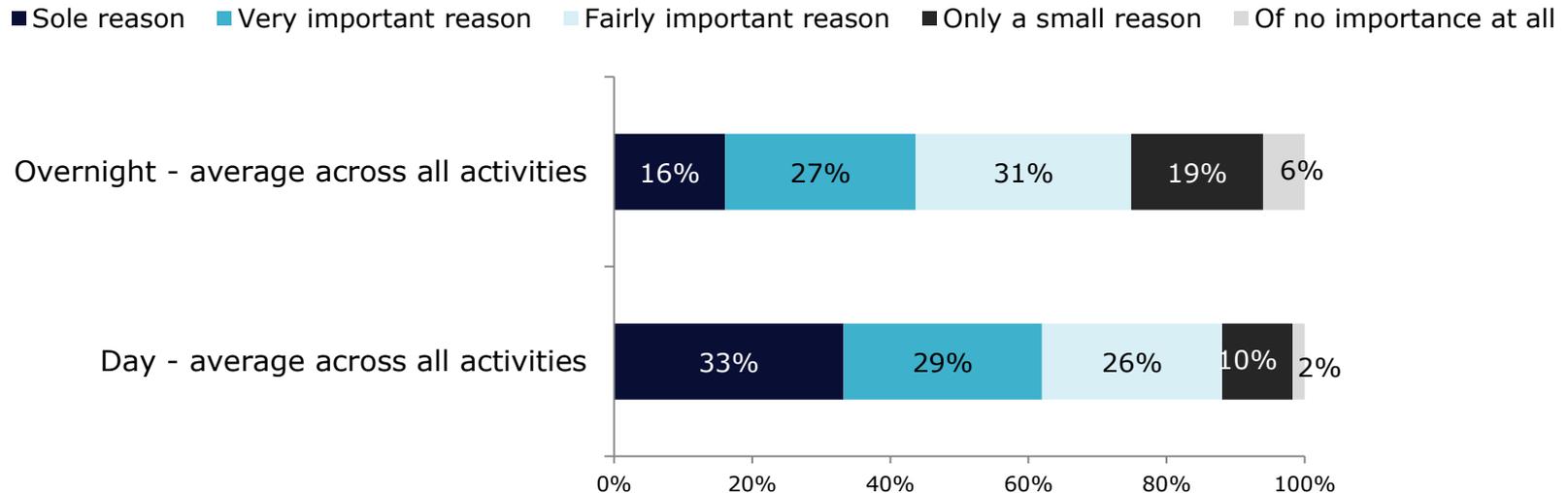


N.B Throughout report abbreviated labels have been used for activities – full descriptions used in GBTS and GBDVS questionnaire are provided in Appendix 1.

Importance of activities – comparing overnight and day visits

- As shown below individual activities are more likely to influence decisions to take day visits than decisions to take holidays or short breaks.
- On average, an activity was the sole reason for choosing to take a third of day visits (33%) while just 16% of overnight holidays and short breaks were taken because of a single activity.

Figure 3 – Average influence of activities on decisions to take visits.



Importance of activities in decisions to take holidays and day visits

- Figures 4 and 5 on the following pages illustrate results relating to the importance of specific activities in decisions to take holidays and short breaks.

Holidays (Figure 4)

- Those respondents who had taken part in activities during a domestic holiday or short break taken in the UK were asked how important the activity was in their decision to take the visit.
- Activities most likely to be the sole or a very important reason in decisions to take visits included family events, live music or other events/festivals and attending live sport.
- Conversely, eating and drinking locally produced food, visits to historic buildings, museums & galleries, parks & gardens or religious buildings were less likely to be as important in decisions to take holidays.

Day visits (Figure 5)

- Those respondents who had taken part in activities during a day visit were asked how important the activity was in their decision to take the visit.
- Activities most likely to be the sole or a very important reason in decisions to take day visits included attending family events, attending live sport, attending the theatre and attending live music or other events/festivals.
- However, visits to parks & gardens, religious buildings, sightseeing in towns and cities or eating and drinking locally produced food were less likely to be as important in decisions to take day visits.

Figure 4 - Thinking about the most recent UK holidays or short breaks when you took part in these activities, how important was being able to undertake these activities in your decision to take the holiday or short break...?

■ Sole reason ■ Very important reason ■ Fairly important reason ■ Only a small reason ■ Of no importance at all

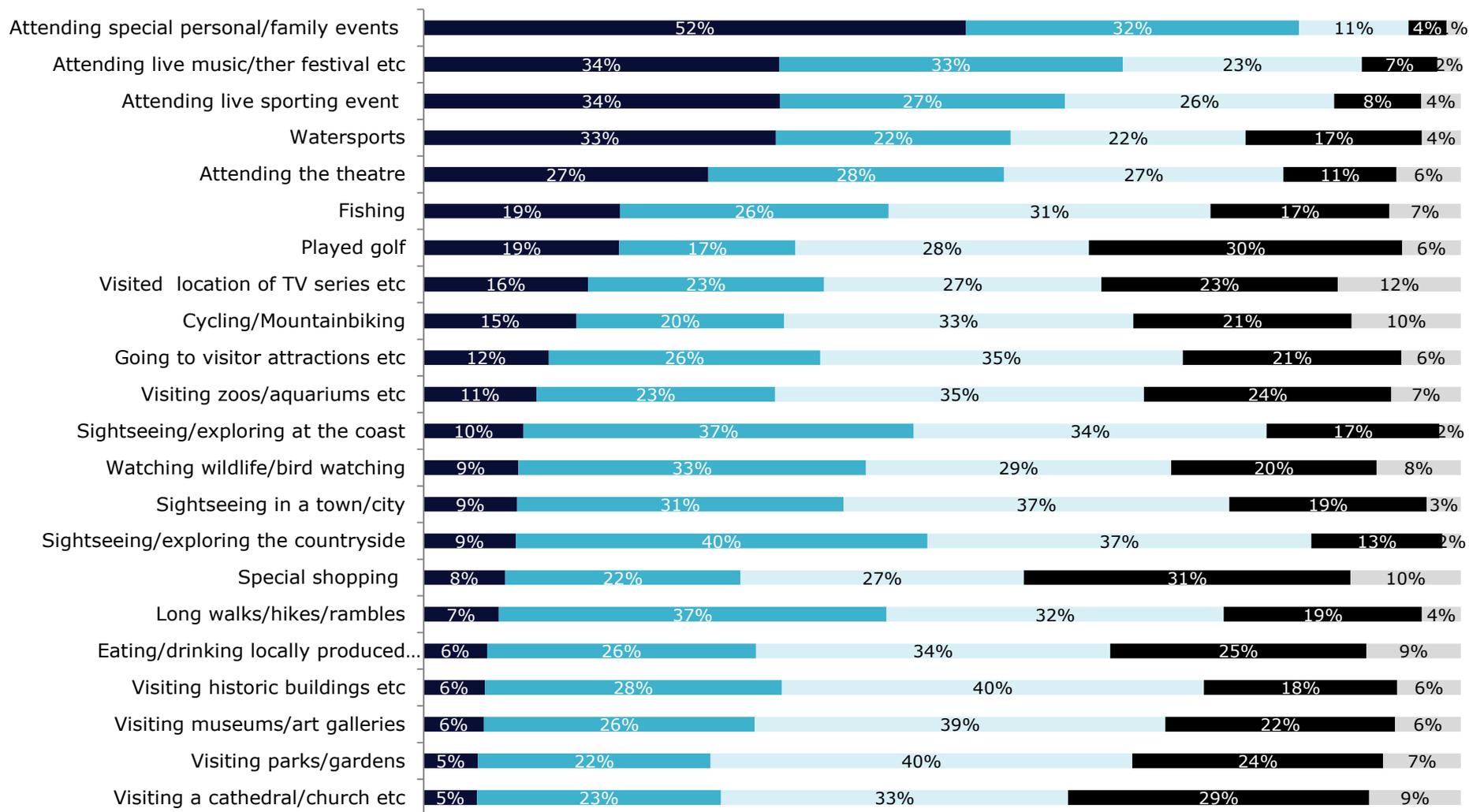
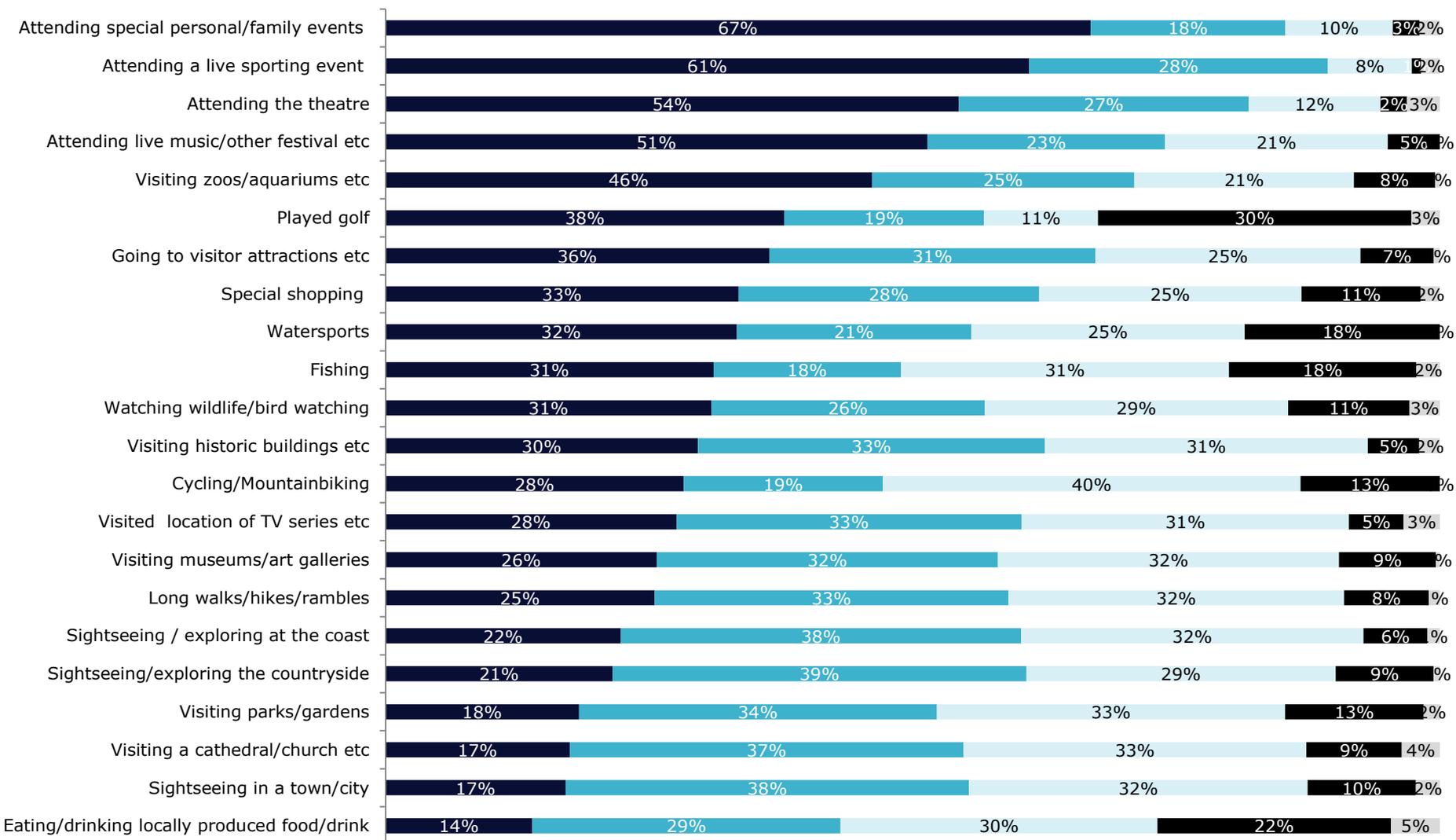


Figure 5 - Thinking about the most recent day visits when you took part in these activities, how important was being able to undertake these activities in your decision to take the day visit...?

■ Sole reason ■ Very important reason ■ Fairly important reason ■ Only a small reason ■ Of no importance at all



GBTS, GBDVS and IPS analysis



GBTS – total expenditure on trips including an activity

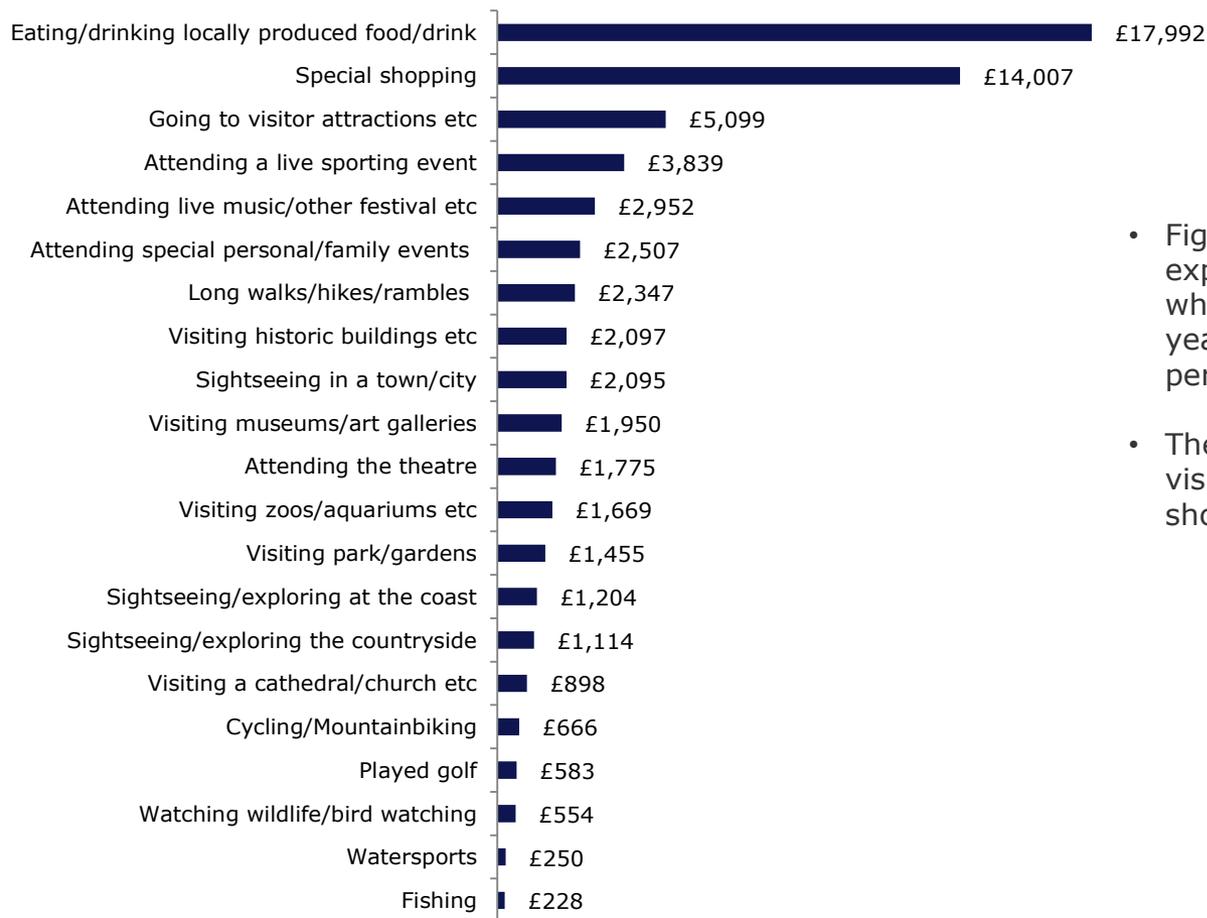
Figure 6 - Total expenditure on domestic holidays and short breaks including an activity (£m, annual average GBTS 2012-2014)



- Figure 6 illustrates estimates of total expenditure on holidays and short breaks which include particular activities (3 year averages over 2012 to 2014 period).
- The highest amounts are spent on visits which include visits to attractions and longer walks while smaller amounts are spent during visits including activities such as watersports, attending live sport and playing golf.

GBDVS – total expenditure on trips including an activity

Figure 7 - Total expenditure on Tourism Day Visits including an activity (£m, annual average GBDVS 2012-2014)



- Figure 7 illustrates estimates of total expenditure on Tourism Day Visits which include particular activities (3 year averages over 2012 to 2014 period).
- The highest amounts are spent on visits which include eating out, shopping and visiting attractions.

IPS – total expenditure on trips including an activity

Figure 8 - Total expenditure on overseas holidays to the UK including an activity (£m, historic annual data collected over the 2006 to 2011 period)



- Figure 8 illustrates estimates of total expenditure on overseas visits to the UK which include particular activities (based on individual year historic data from IPS collected over the 2009 to 2011 period, using closest activity descriptions where they do not exactly match those used in GBTS and GBDVS).
- The highest amounts are spent on visits which include special shopping while smaller amounts are spent on visits involving outdoor pursuits such as watersports and fishing.

Total expenditure on trip including an activity – all tourism

Figure 9 - Total expenditure all tourism and split by market

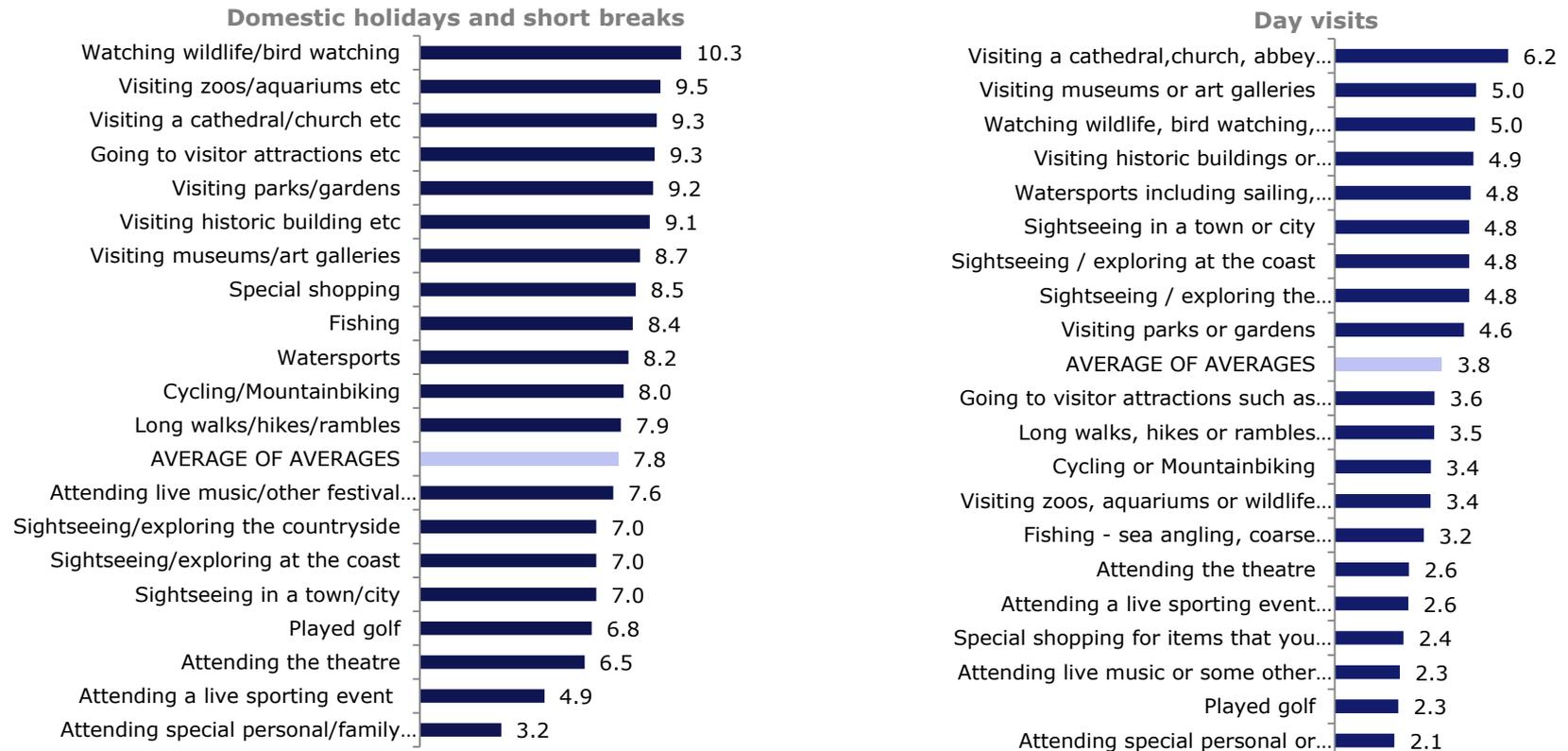
		Overseas overnight	Domestic overnight	Day visits
Special shopping	£27,078	45%	4%	52%
Visiting historic buildings etc	£11,594	56%	26%	18%
Visiting museums/art galleries	£10,527	59%	22%	19%
Visiting parks/gardens	£10,518	74%	12%	14%
Sightseeing in a town/city	£9,066	49%	28%	23%
Visiting a cathedral/church etc	£7,111	70%	18%	13%
Sightseeing/exploring the countryside	£6,749	62%	21%	17%
Attending live music/other festival etc	£6,498	26%	28%	45%
Sightseeing/exploring at the coast	£6,284	47%	34%	19%
Long walks/hikes/rambles	£5,934	12%	48%	40%
Attending a live sporting event	£5,346	21%	7%	72%
Attending the theatre	£5,244	52%	14%	34%
Visiting zoos/aquariums etc	£4,026	22%	37%	41%
Cycling/Mountainbiking	£1,725	29%	33%	39%
Played golf	£1,319	34%	22%	44%
Watersports	£819	20%	49%	31%
Fishing	£807	18%	54%	28%

- Figure 9 illustrates estimates of total expenditure across all tourism (based on estimates from the three surveys where activities are included).
- The highest amount is spent on visits which include shopping while the lowest amounts are spent on visits including outdoor pursuits such as watersports and fishing.
- While the highest share of spend on visits which include an attraction is from overseas visitors, day visitors contribute most spend on visits which include special shopping and attending sporting events.

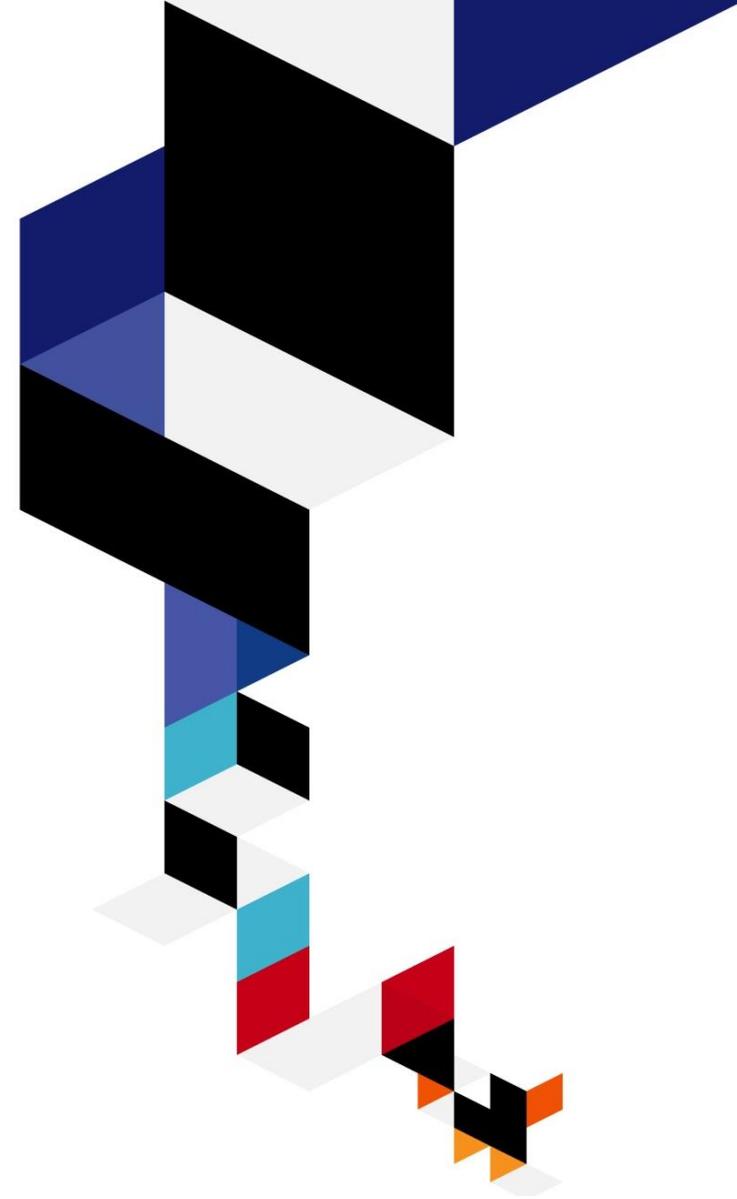
Multiple activities on a single trip

- The number of different activities undertaken on a visit is used as an input to estimates of the attributable value of each activity (see Appendix 1).
- As shown below, the average domestic holiday includes involvement in **7.8** different activities while the average day visit includes **3.8** activities. In both overnight and day visits the largest number of activities are undertaken on trips including visits to historic or religious buildings, museums, art galleries and wildlife watching. Fewer activities are undertaken on trips including a special personal event, a sporting or musical event, golf or going to the theatre.

Figure 10- Average number of activities undertaken on domestic holidays and Tourism Day Visits (GBTS and GBDVS 2014)

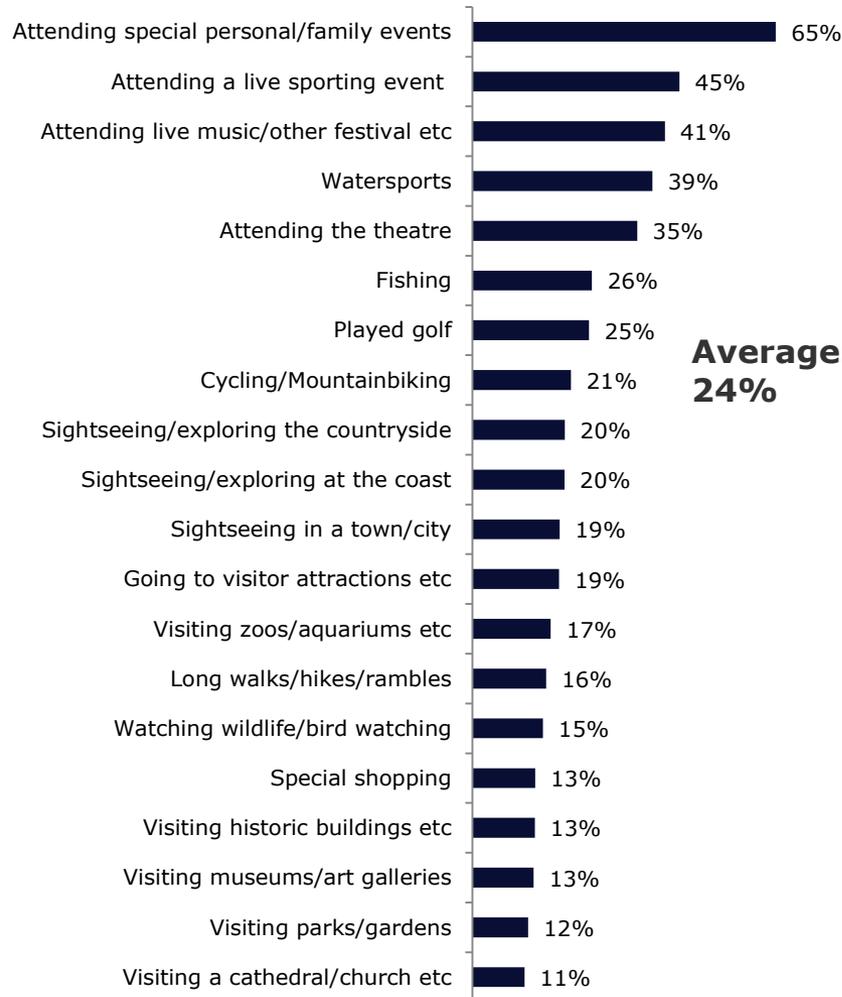


Estimates of attributable spend



Estimates of attributable spend – domestic holidays

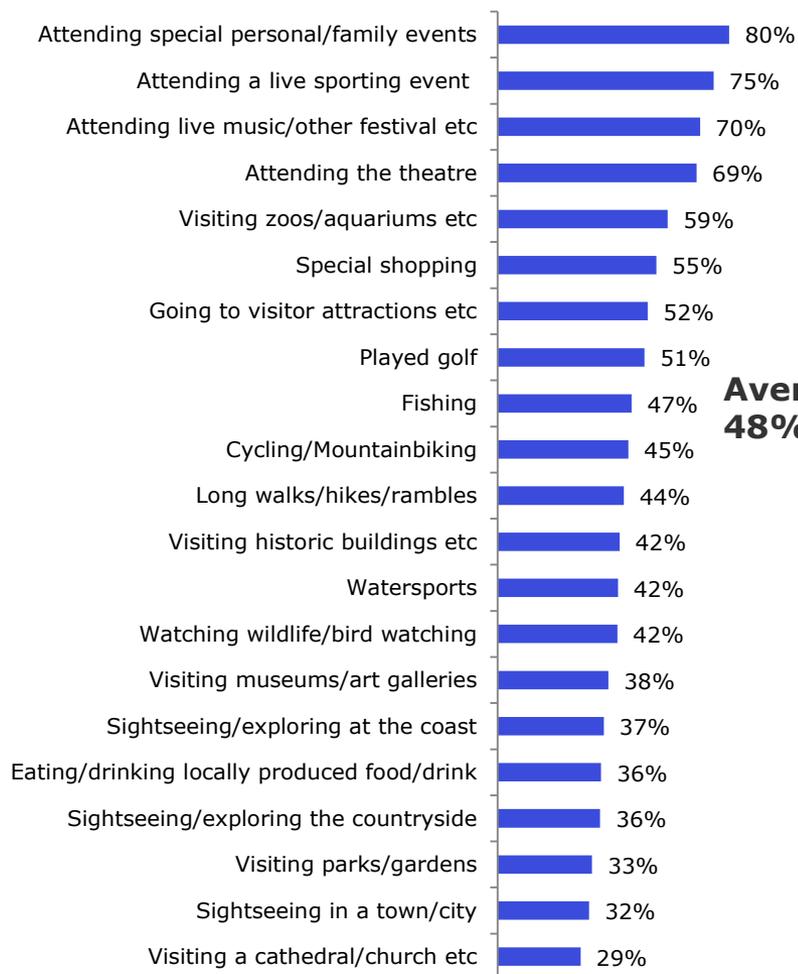
Figure 11- Estimates of share of visit spend attributable to activities – domestic holidays



- Using the results of the omnibus survey regarding the impacts of activities on decisions to take visits and data from GBTS, GBDVS and IPS on the number of activities undertaken during visits, it has been possible to estimate the share of spend on visits attributable to each of the activities of interest. Details on the approaches used are provided in Appendix 1.
- As shown in Figure 11, on domestic holidays taken in the UK, across all of the activities of interest an average of 24% of expenditure is attributable to activities.
- The highest share of spend is attributable to personal, sporting or cultural events.

Estimates of attributable spend – day visits

Figure 12 - Estimates of share of visit spend attributable to activities – day visits



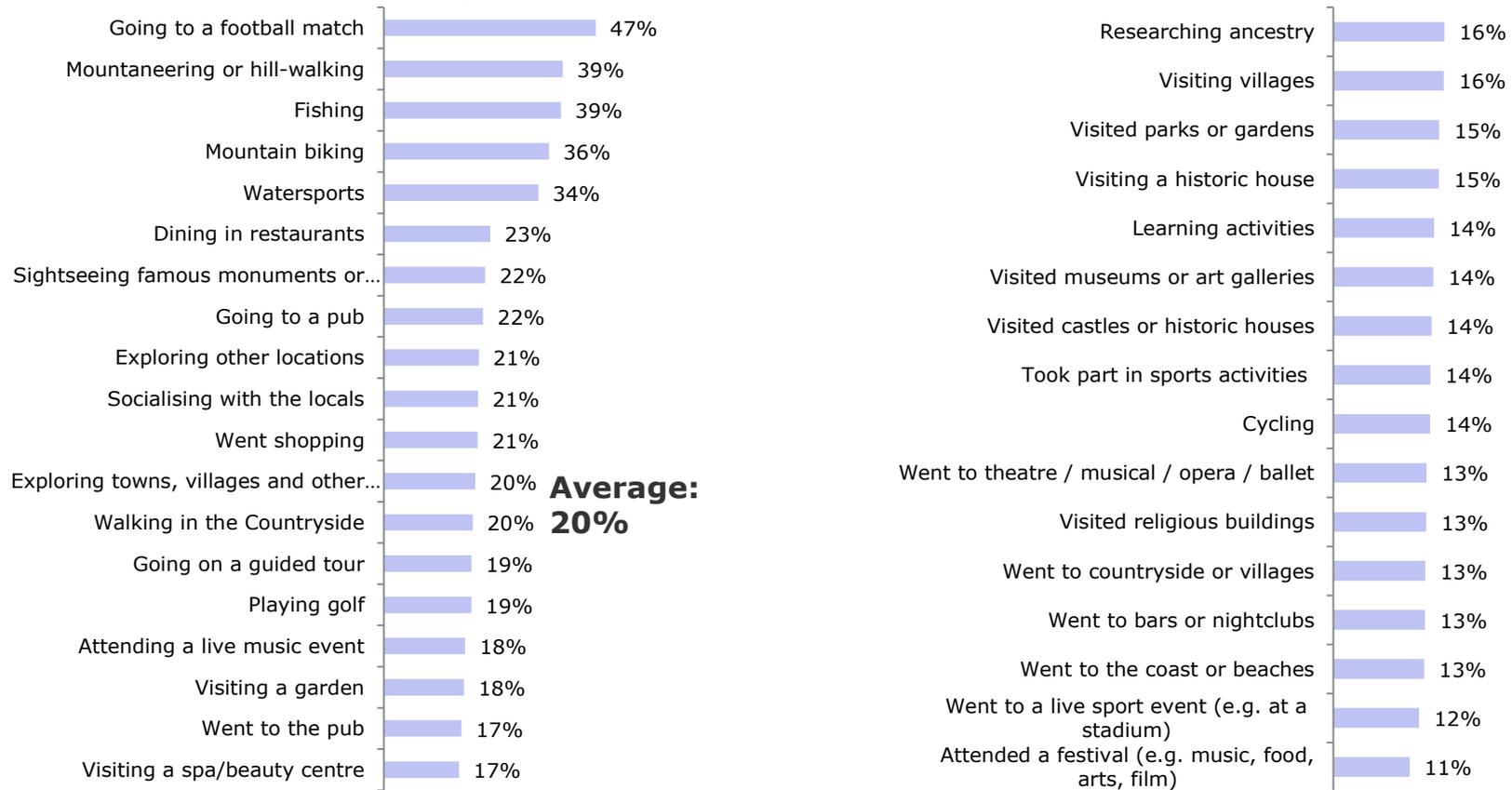
**Average:
48%**

- On Tourism Day Visits, an average of 48% of expenditure is attributable to activities (double the proportion recorded for domestic overnight visits, suggesting that activities play a greater role in 'driving' day visit taking decisions).
- In common with overnight domestic trips, the highest share of spend is attributable to personal, sporting or cultural events.

Estimates of attributable spend – overseas visits

- As the omnibus survey collected data on domestic visits only, an alternative approach using data on the number of different activities undertaken on visits was used (see Appendix 1 for details).
- Using this approach the average 'impact' of an activity on the decision to take a visit is **20%** - slightly less than the estimate for domestic holidays (**24%**). The results for all of the activities included in IPS between 2009 and 2011 are shown.

Figure 13 - Estimates of share of visit spend attributable to activities – overseas visits



Estimating attributable spend

- Applying the estimated proportions of attributable spend (i.e. as detailed on the last 3 pages) to estimates of total spend in visits involving these activities (from GBTS, GBDVS and IPS) provides the following estimates of total attributable spend for each of the activities of interest.

	Attributable expenditure (£m)				Notes
	Overseas	Domestic overnight	Day visits	Total	
Golf	£85	£73	£297	£456	
Long walks/ hikes / rambles	£286	£454	£1,029	£1,769	
Fishing	£56	£112	£106	£274	
Watersports.	£56	£156	£105	£317	
Cycling/ mountainbiking	£99	£119	£302	£520	
Visiting historic buildings, etc.	£909	£402	£888	£2,199	
Visiting a cathedral/ church, etc.	£652	£142	£258	£1,053	
Going to visitor attractions	n/a	£1,133	£2,654	£3,787	Domestic only
Visiting museums/ art galleries	£889	£306	£750	£1,944	
Sightseeing in a town or city	£886	£481	£665	£2,032	
Attending the theatre	£364	£256	£1,225	£1,845	
Visited a location associated with a TV series, etc.	£65	n/a	n/a	£65	Overseas only
Sightseeing / exploring at the coast	£487	£420	£443	£1,351	
Sightseeing / exploring the countryside	£550	£284	£396	£1,230	
Watching wildlife/ bird watching	n/a	£76	£231	£306	Domestic only
Visiting parks / gardens	£1,177	£148	£477	£1,803	
Visiting zoos/ aquariums, etc.	£116	£250	£985	£1,351	
Attending live music/ some other festival, etc.	£305	£762	£2,073	£3,140	
Eating / drinking locally produced food/ drink	n/a	n/a	£6,461	£6,461	Day visits only
Attending a live sporting event	£137	£169	£2,876	£3,182	
Attending special personal or family events	n/a	£325	£2,014	£2,339	Domestic only
Special shopping	£2,494	£132	£7,710	£10,336	

Total attributable spend on overseas trips, domestic holidays and day visits

Figure 14 - Total attributable spend on holidays and day visits by activity (£m)

Activity	Total Spend (£m)	Proportion of total spend that is attributable
Special shopping	£10,336	38%
Attending a live sporting event	£3,182	60%
Attending live music/other festival etc	£3,140	48%
Visiting historic buildings etc	£2,199	19%
Sightseeing in a town/city	£2,032	22%
Visiting museums/art galleries	£1,944	18%
Attending the theatre	£1,845	35%
Visiting parks/gardens	£1,803	17%
Long walks/hikes/rambles	£1,769	30%
Sightseeing/exploring at the coast	£1,351	21%
Visiting zoos/aquariums etc	£1,351	34%
Sightseeing/exploring the countryside	£1,230	18%
Visiting a cathedral/church etc	£1,053	15%
Cycling/Mountainbiking	£520	30%
Played golf	£456	35%
Watersports	£317	39%
Fishing	£274	34%

- Figure 14 illustrates total (all tourism) attributable spend for visits involving activities where data is available from all three surveys (i.e. overseas, domestic and day visits).
- On this basis the highest level of attributable spend is on visits which include special shopping with around £10.3 bn influenced by participation in this activity.
- The second highest attributable spend is related to attending live sporting events. An estimated 60% of spend on visits which include this activity is considered to be attributable – a higher proportion than for any of the other activities.

Total attributable spend – domestic tourism

Figure 15 - Total attributable spend on domestic holidays and day visits by activity (£m)

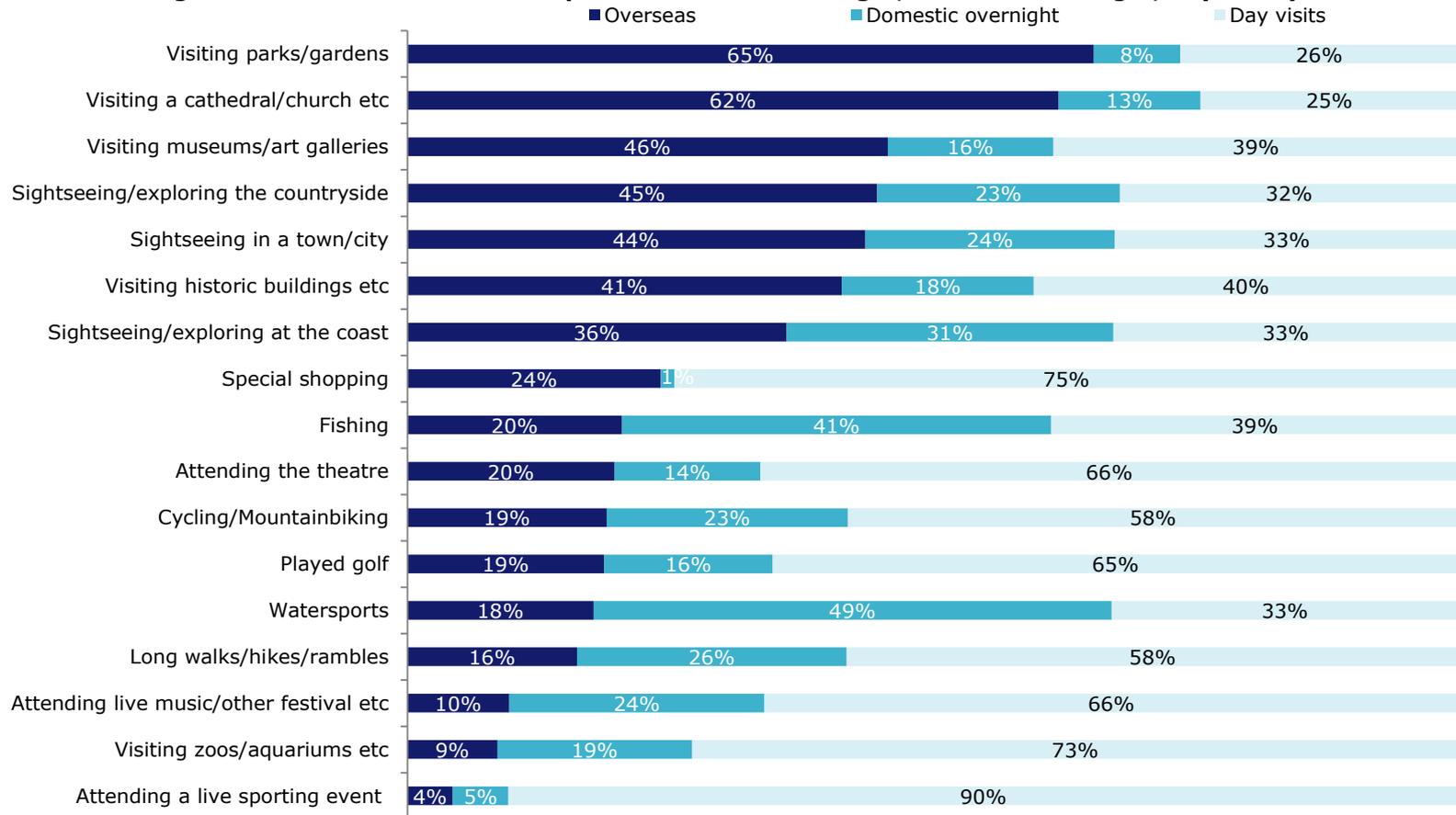
		Proportion of total spend that is attributable
Special shopping	£7,843	52%
Going to visitor attractions, etc	£3,787	34%
Attending a live sporting event	£3,044	72%
Attending live music/some other festival, etc.	£2,835	59%
Attending special personal or family events	£2,339	78%
Long walks, hikes or rambles	£1,483	28%
Attending the theatre	£1,481	59%
Visiting historic buildings/ monuments, etc.	£1,290	25%
Visiting zoos, aquariums, etc.	£1,235	39%
Sightseeing in a town or city	£1,145	25%
Visiting museums/ art galleries	£1,055	25%
Sightseeing / exploring at the coast	£864	26%
Sightseeing / exploring the countryside	£680	27%
Visiting parks/ gardens	£625	23%
Cycling/ mountainbiking	£422	34%
Visiting a cathedral/ church, etc	£400	19%
Golf	£370	42%
Watching wildlife/ bird watching, etc	£306	29%
Watersports	£261	40%
Fishing	£218	33%

- Figure 15 illustrates total domestic attributable spend (i.e. including both holidays and day visits).

Total attributable spend – all tourism

- The expenditure contribution of different tourism markets (i.e. overseas/ domestic/ day visits) varies significantly by activity as shown below.
- In general the highest shares of attributable spend on visits including attractions are driven by overseas visits while day visits account for more spend on visits including shopping or outdoor pursuits.

Figure 16 – Percentage distribution of attributable spend – overseas overnight, domestic overnight, day visits)



Regional analysis of domestic expenditure



Overall results – domestic holidays and day visits

- Regional estimates of attributable spend on domestic holidays and days visits combined are shown below.
- See Appendices for full details and results.

Estimates of attributable spend on domestic holidays and ay visits by activity and destination (£m)

	Scotland	Wales	North East England	North West England	Yorkshire	East Midlands	West Midlands	East of England	London	South East England	South West England	TOTAL ENGLAND
Golf	£86	£22	£17	£20	£32	£13	£19	£25	£35	£49	£45	£256
Long walks/ hikes / rambles	£160	£163	£43	£178	£109	£56	£70	£71	£261	£144	£221	£1,152
Fishing	£32	£38	£2	£13	£10	£4	£1	£24	£23	£19	£35	£131
Watersports.	£23	£23	£0	£25	£13	£9	£9	£40	£6	£16	£85	£204
Cycling/ mountainbiking	£33	£54	£16	£46	£23	£27	£9	£28	£71	£48	£52	£319
Visiting historic buildings, etc.	£183	£136	£54	£66	£80	£111	£67	£70	£136	£138	£166	£888
Visiting a cathedral/ church, etc.	£61	£35	£22	£18	£38	£17	£12	£23	£84	£43	£60	£316
Going to visitor attractions	£351	£270	£129	£330	£235	£184	£218	£247	£810	£437	£547	£3,137
Visiting museums/ art galleries	£125	£69	£32	£62	£91	£52	£44	£55	£291	£86	£93	£806
Sightseeing (any locations)	£290	£275	£86	£276	£207	£93	£102	£161	£420	£276	£499	£2,120
Attending the theatre	£113	£94	£25	£100	£44	£101	£73	£27	£716	£108	£79	£1,271
Watching wildlife/ bird watching	£45	£46	£8	£29	£16	£10	£9	£26	£32	£39	£61	£229
Visiting parks / gardens	£58	£49	£30	£60	£41	£60	£32	£46	£66	£76	£106	£517
Visiting zoos/ aquariums, etc.	£96	£164	£31	£134	£79	£40	£72	£110	£118	£152	£200	£936
Attending live music/ some other festival, etc.	£195	£97	£68	£226	£153	£125	£160	£122	£725	£243	£204	£2,024
Attending a live sporting event	£258	£150	£163	£347	£210	£211	£185	£135	£871	£287	£179	£2,587
Attending special personal or family events	£189	£142	£60	£215	£292	£90	£166	£147	£508	£311	£180	£1,970
Special shopping	£841	£453	£357	£720	£516	£394	£719	£677	£1,314	£1,036	£ 800	£6,533

Note that given the smaller survey sample sizes at the sub-GB levels these estimates should be treated as indicative.

Distribution of attributable expenditure – domestic holidays and day visits

- This analysis suggests the following regional distribution of attributable spend across all domestic tourism . As would be expected, this distribution varies greatly by activity. For example attributable spend on visits including theatre is more likely to be take place in London while the highest share of attributable spend on visits including golf is in Scotland.

Regional distribution of attributable spend on domestic holidays & day visits combined (row %)

	Scotland	Wales	North East England	North West England	Yorkshire	East Midlands	West Midlands	East of England	London	South East England	South West England	TOTAL ENGLAND
Golf	24%	6%	5%	6%	9%	4%	5%	7%	10%	13%	12%	70%
Long walks/ hikes / rambles	11%	11%	3%	12%	7%	4%	5%	5%	18%	10%	15%	78%
Fishing	16%	19%	1%	6%	5%	2%	0%	12%	12%	10%	17%	65%
Watersports.	9%	9%	0%	10%	5%	4%	4%	16%	2%	7%	34%	82%
Cycling/ mountainbiking	8%	13%	4%	11%	6%	7%	2%	7%	17%	12%	13%	78%
Visiting historic buildings, etc.	15%	11%	4%	5%	7%	9%	6%	6%	11%	11%	14%	74%
Visiting a cathedral/ church, etc.	15%	8%	5%	4%	9%	4%	3%	6%	20%	10%	15%	77%
Going to visitor attractions	9%	7%	3%	9%	6%	5%	6%	7%	22%	12%	15%	83%
Visiting museums/ art galleries	12%	7%	3%	6%	9%	5%	4%	5%	29%	9%	9%	81%
Sightseeing (any locations)	11%	10%	3%	10%	8%	3%	4%	6%	16%	10%	19%	79%
Attending the theatre	8%	6%	2%	7%	3%	7%	5%	2%	48%	7%	5%	86%
Watching wildlife/ bird watching	14%	14%	3%	9%	5%	3%	3%	8%	10%	12%	19%	72%
Visiting parks / gardens	9%	8%	5%	10%	7%	10%	5%	7%	11%	12%	17%	83%
Visiting zoos/ aquariums, etc.	8%	14%	3%	11%	7%	3%	6%	9%	10%	13%	17%	78%
Attending live music/ some other festival, etc.	8%	4%	3%	10%	7%	5%	7%	5%	31%	11%	9%	87%
Attending a live sporting event	9%	5%	5%	12%	7%	7%	6%	5%	29%	10%	6%	86%
Attending special personal or family events	8%	6%	3%	9%	13%	4%	7%	6%	22%	14%	8%	86%
Special shopping	11%	6%	5%	9%	7%	5%	9%	9%	17%	13%	10%	83%

Note that given the smaller survey sample sizes at the sub-GB levels these estimates should be treated as indicative.

Overall results – day visits

- Estimates of attributable spend on day visits taken to Scotland, Wales and English regions are shown below.
- These estimates have been produced by applying GB level estimates of share of expenditure attributable to each activity to GBDVS data (3 year averages for 2012- 2014 period).

Estimates of attributable spend on day visits by activity and destination (£m)

	Scotland	Wales	North East	North West	Yorkshire	East Mids	West Mids	East	London	South East	South West	TOTAL ENGLAND
Golf	£70	£13	£12	£16	£30	£11	£18	£21	£35	£40	£28	£210
Long walks/ hikes / rambles	£95	£108	£30	£120	£74	£37	£60	£40	£243	£116	£101	£821
Fishing	£10	£25	£1	£11	£6	£1	£1	£11	£23	£14	£4	£71
Watersports.	£10	£5	<£0.5	£12	£10	£4	£7	£37	£6	£7	£7	£90
Cycling/ mountainbiking	£16	£44	£14	£32	£18	£18	£8	£16	£68	£39	£23	£236
Visiting historic buildings, etc.	£123	£99	£40	£49	£58	£98	£54	£49	£111	£108	£88	£655
Visiting a cathedral/ church, etc.	£39	£20	£14	£7	£20	£11	£7	£12	£71	£31	£26	£198
Going to visitor attractions	£204	£163	£93	£234	£149	£134	£174	£169	£707	£329	£272	£2,261
Visiting museums/ art galleries	£81	£53	£24	£46	£69	£47	£36	£39	£245	£65	£42	£613
Sightseeing (any locations)	£106	£142	£50	£136	£109	£43	£66	£75	£306	£173	£186	£1,144
Attending the theatre	£91	£84	£24	£84	£34	£96	£63	£16	£587	£93	£52	£1,049
Watching wildlife/ bird watching	£23	£36	£5	£19	£11	£6	£7	£15	£31	£35	£40	£170
Visiting parks / gardens	£39	£36	£25	£52	£32	£54	£27	£37	£56	£62	£54	£398
Visiting zoos/ aquariums, etc.	£70	£142	£26	£116	£69	£30	£68	£88	£106	£135	£134	£772
Attending live music/ some other festival, etc.	£155	£81	£60	£197	£137	£112	£142	£111	£684	£218	£171	£1,832
Eating / drinking locally produced food/ drink	£649	£393	£301	£664	£523	£320	£531	£486	£1,551	£939	£634	£5,947
Attending a live sporting event	£238	£131	£153	£323	£195	£197	£178	£130	£845	£275	£153	£2,450
Attending special personal or family events	£148	£123	£35	£180	£257	£73	£153	£134	£488	£285	£126	£1,730
Special shopping	£818	£442	£353	£704	£509	£388	£711	£670	£1,294	£1,022	£774	£6,424

Note that given the smaller survey sample sizes at the sub-GB levels these estimates should be treated as indicative.

Distribution of attributable expenditure – day visits

- This analysis shows the regional distribution of attributable day visit spend.

Regional distribution of attributable spend on day visits (row %)

	Scotland	Wales	North East England	North West England	Yorkshire	East Midlands	West Midlands	East of England	London	South East England	South West England	TOTAL ENGLAND
Golf	24%	5%	4%	5%	10%	4%	6%	7%	12%	13%	10%	72%
Long walks/ hikes / rambles	9%	11%	3%	12%	7%	4%	6%	4%	24%	11%	10%	80%
Fishing	9%	23%	0%	11%	6%	1%	1%	10%	22%	13%	4%	67%
Watersports.	9%	5%	0%	11%	9%	4%	7%	35%	6%	7%	7%	86%
Cycling/ mountainbiking	5%	15%	5%	11%	6%	6%	3%	5%	23%	13%	8%	80%
Visiting historic buildings, etc.	14%	11%	5%	6%	7%	11%	6%	6%	13%	12%	10%	75%
Visiting a cathedral/ church, etc.	15%	8%	5%	3%	8%	4%	3%	5%	28%	12%	10%	77%
Going to visitor attractions	8%	6%	4%	9%	6%	5%	7%	6%	27%	13%	10%	86%
Visiting museums/ art galleries	11%	7%	3%	6%	9%	6%	5%	5%	33%	9%	6%	82%
Sightseeing (any locations)	8%	10%	4%	10%	8%	3%	5%	5%	22%	12%	13%	82%
Attending the theatre	7%	7%	2%	7%	3%	8%	5%	1%	48%	8%	4%	86%
Watching wildlife/ bird watching	10%	16%	2%	8%	5%	3%	3%	7%	14%	15%	17%	74%
Visiting parks / gardens	8%	8%	5%	11%	7%	11%	6%	8%	12%	13%	11%	84%
Visiting zoos/ aquariums, etc.	7%	14%	3%	12%	7%	3%	7%	9%	11%	14%	14%	78%
Attending live music/ some other festival, etc.	7%	4%	3%	10%	7%	5%	7%	5%	33%	11%	8%	89%
Eating / drinking locally produced food/ drink	9%	6%	4%	10%	7%	5%	8%	7%	22%	13%	9%	85%
Attending a live sporting event	8%	5%	5%	11%	7%	7%	6%	5%	30%	10%	5%	87%
Attending special personal or family events	7%	6%	2%	9%	13%	4%	8%	7%	24%	14%	6%	86%
Special shopping	11%	6%	5%	9%	7%	5%	9%	9%	17%	13%	10%	84%

Overall results – domestic holidays

- Estimates of attributable spend on domestic overnight holiday taken to Scotland, Wales and English regions are shown below.
- These estimates have been produced by applying GB level estimates of share of expenditure attributable to each activity applied to GBTS data (3 year averaged for 2012- 2014 period).

Estimates of attributable spend on domestic overnight holidays by activity and destination (£m)

	Scotland	Wales	North East	North West	Yorkshire	East Mids	West Mids	East	London	South East	South West	TOTAL ENGLAND
Golf	£16	£9	£5	£5	£2	£2	£2	£5	<£0.5	£10	£16	£46
Long walks/ hikes / rambles	£66	£55	£13	£58	£35	£19	£10	£31	£18	£28	£120	£331
Fishing	£22	£13	£1	£1	£4	£3	<£0.5	£14	<£0.5	£5	£31	£59
Watersports.	£13	£18	<£0.5	£13	£3	£5	£2	£3	<£0.5	£9	£78	£114
Cycling/ mountainbiking	£18	£10	£2	£14	£4	£9	£2	£12	£3	£9	£29	£83
Visiting historic buildings, etc.	£60	£37	£14	£17	£22	£13	£13	£22	£26	£30	£78	£233
Visiting a cathedral/ church, etc.	£22	£14	£8	£11	£18	£5	£5	£11	£13	£12	£34	£118
Going to visitor attractions	£147	£107	£36	£96	£86	£51	£44	£79	£103	£108	£276	£877
Visiting museums/ art galleries	£44	£17	£9	£16	£21	£5	£8	£16	£46	£21	£51	£193
Sightseeing (any locations)	£184	£133	£36	£140	£98	£50	£37	£86	£114	£102	£313	£976
Attending the theatre	£22	£11	£2	£15	£10	£5	£10	£11	£129	£15	£26	£222
Watching wildlife/ bird watching	£21	£11	£3	£10	£4	£3	£2	£10	<£0.5	£4	£21	£59
Visiting parks / gardens	£19	£12	£5	£8	£10	£6	£5	£9	£11	£14	£52	£119
Visiting zoos/ aquariums, etc.	£26	£22	£5	£18	£10	£9	£4	£22	£12	£17	£66	£164
Attending live music/ some other festival, etc.	£40	£17	£7	£28	£16	£12	£18	£11	£41	£25	£33	£192
Attending a live sporting event	£20	£20	£10	£24	£15	£13	£6	£6	£25	£12	£26	£138
Attending special personal or family events	£41	£19	£25	£35	£35	£18	£13	£14	£20	£25	£54	£239
Special shopping	£22	£11	£4	£16	£8	£6	£7	£7	£20	£14	£26	£109

Note that given the smaller survey sample sizes at the sub-GB levels these estimates should be treated as indicative.

Distribution of attributable expenditure – domestic holidays

- This analysis shows the regional distribution of attributable domestic holiday spend.

Regional distribution of attributable spend on domestic holidays (row %)

	Scotland	Wales	North East England	North West England	Yorkshire	East Midlands	West Midlands	East of England	London	South East England	South West England	TOTAL ENGLAND
Golf	23%	13%	7%	7%	3%	3%	2%	6%	0%	14%	23%	65%
Long walks/ hikes / rambles	15%	12%	3%	13%	8%	4%	2%	7%	4%	6%	27%	73%
Fishing	23%	14%	2%	1%	4%	4%	0%	14%	0%	5%	33%	63%
Watersports.	9%	13%	0%	9%	2%	4%	1%	2%	0%	6%	54%	78%
Cycling/ mountain biking	16%	9%	2%	12%	4%	8%	1%	11%	3%	8%	26%	74%
Visiting historic buildings, etc.	18%	11%	4%	5%	7%	4%	4%	7%	8%	9%	24%	71%
Visiting a cathedral/ church, etc.	14%	9%	5%	7%	12%	3%	4%	7%	8%	8%	22%	76%
Going to visitor attractions	13%	9%	3%	8%	8%	4%	4%	7%	9%	10%	24%	78%
Visiting museums/ art galleries	17%	7%	3%	6%	8%	2%	3%	6%	18%	8%	20%	76%
Sightseeing (any locations)	14%	10%	3%	11%	8%	4%	3%	7%	9%	8%	24%	75%
Attending the theatre	9%	4%	1%	6%	4%	2%	4%	4%	51%	6%	10%	87%
Watching wildlife/ bird watching	24%	12%	4%	11%	5%	4%	2%	11%	0%	4%	23%	65%
Visiting parks / gardens	13%	8%	3%	5%	6%	4%	3%	6%	7%	9%	35%	79%
Visiting zoos/ aquariums, etc.	12%	10%	2%	8%	5%	4%	2%	10%	5%	8%	31%	77%
Attending live music/ some other festival, etc.	16%	7%	3%	11%	6%	5%	7%	4%	17%	10%	13%	77%
Attending a live sporting event	11%	11%	6%	14%	9%	7%	4%	3%	14%	7%	15%	78%
Attending special personal or family events	14%	6%	8%	12%	12%	6%	4%	5%	7%	8%	18%	80%
Special shopping	16%	8%	3%	11%	5%	4%	5%	5%	14%	10%	18%	76%

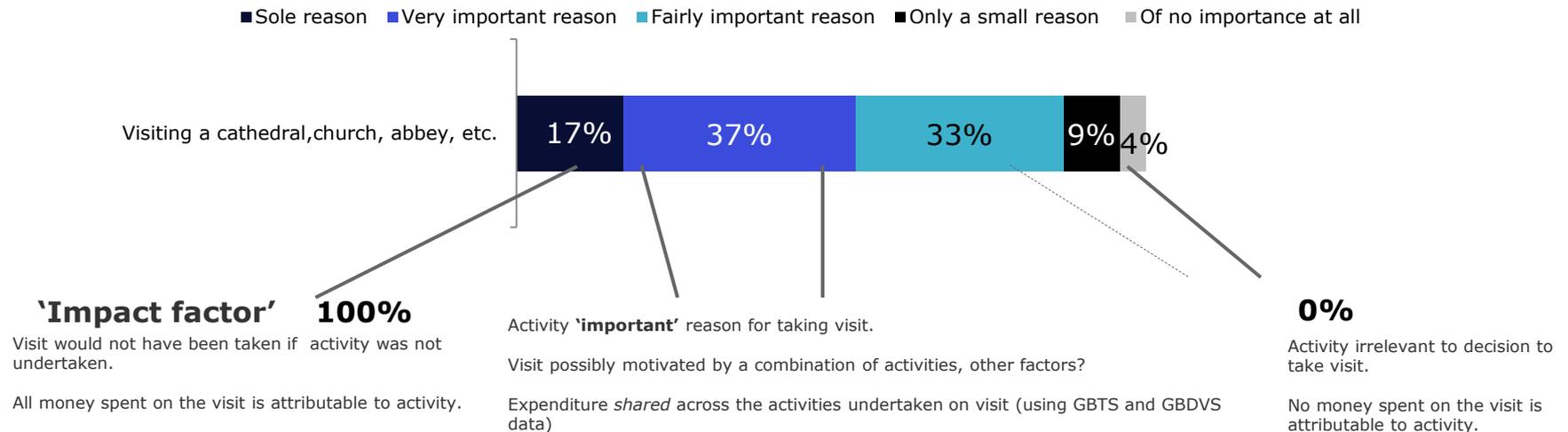
Appendix 1

Details of approach to estimating attributable spend by activity



Estimating attributable spend – domestic trips

- The diagram below illustrates the approach taken to estimate the proportion of spend on visits involving an activity that can be considered to attributable to this activity.
- Data from the omnibus survey is used together with data from GBTS and GBDVS analysis regarding the average numbers of activities undertaken per visit.



To illustrate this approach, to calculate the attributable value of visits to cathedrals, churches, etc. during day visits:

- From GBDVS total spend on day visits involving this activity is **£898m**
- From the omnibus survey – in 17% of visits involving this activity it was the sole reason for the trip : $£898m \times 17\% =$ **£157m** – all of this spend is considered as attributable
- In a further 70% of visits the activity was a very or fairly important reason for taking this trip = $£898m \times 70\% =$ £629m
- This £629m spend is 'shared' across the average 6.17 activities undertaken on day visits which include visits to cathedrals, churches, etc.: $£629/6.17 =$ **£102m**
- Total attributable spend is the sum of these values: £157m + £102m = £259m**

Regional estimates

- Regional estimates have been produced using a similar approach with the national estimates of proportion of spend attributable to activities applied to sub-national expenditure data from GBTS and GBDVS.

Estimating attributable spend – overseas trips

- Omnibus questions were asked of GB residents only. If activities had the same impact on the decisions of overseas visitors as domestic, we could apply the same factors – but this is unlikely to be the case.
- We have therefore used an approach similar to that used by VisitBritain which takes account of the overall trip purpose and number of different activities done on a visit.
- Note that the IPS expenditure data used to produce these estimates was collected over the 2006 to 2011 period. This data has not been adjusted to take account of inflation so the resultant estimates of attributable spend may be conservative.

Factor 1 - Trip purpose

	Maximum % of spend attributed to act
Holiday	100%
VFR	50%
Business	25%
Other	25%

Factor 2 - Proportion activity represents of all activities recorded

e.g. 1 of 5 activities undertaken = 20%

1 of 7 activities undertaken 14.3% etc.

Reflects the approach used to share spend across a visit in domestic trips.

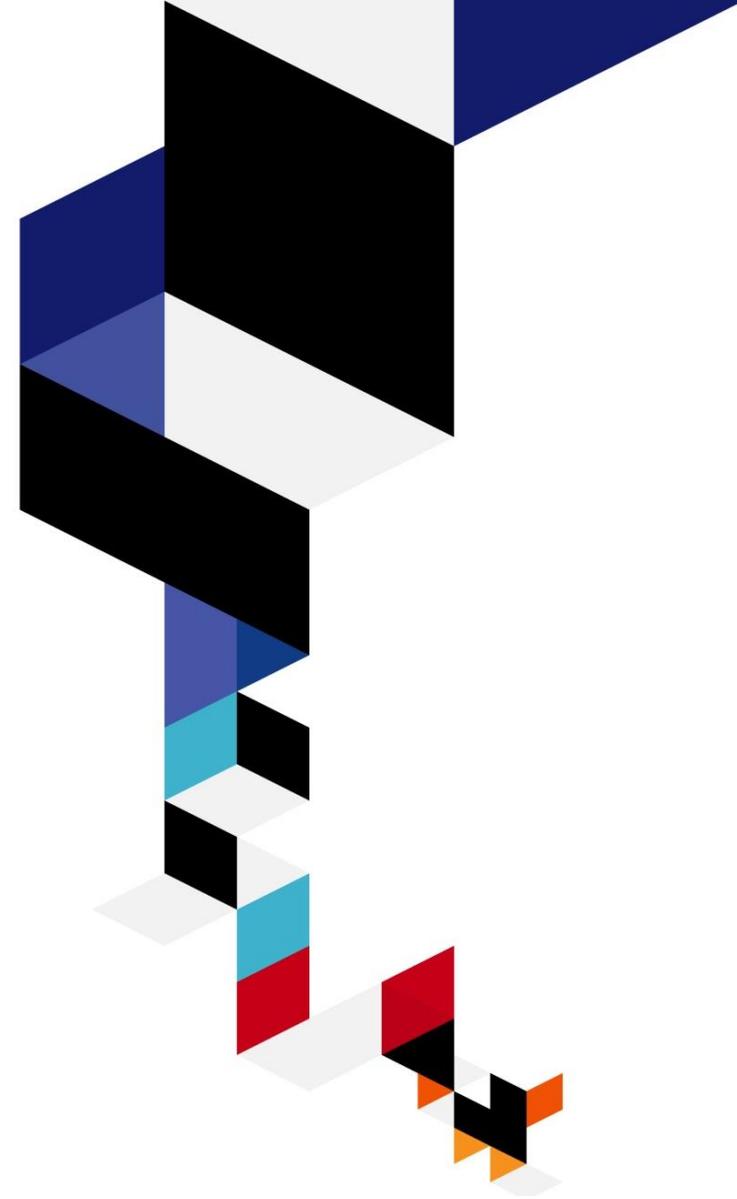
**Spend attributable to an activity =
Total spend by visitors who do the activity x Factor 1 x Factor 2**

Activity labelling

Full description in questionnaires (GBTS and GBDVS)	Abbreviated label in report
Played golf	Golf
Watersports including sailing, canoeing, kayaking, windsurfing, etc.	Watersports
Fishing - sea angling, coarse fishing, game fishing	Fishing
Cycling or Mountainbiking	Cycling/Mountainbiking
Visited a location associated with a TV series, film or literature	Visited location of TV series etc
Attending a live sporting event (e.g. football or rugby match)	Attending live sporting event
Attending live music or some other festival or event (e.g. local food or arts festival, music concert)	Attending live music/other festival etc
Attending the theatre	Attending the theatre
Watching wildlife, bird watching, other nature	Watching wildlife/bird watching
Special shopping for items that you do not regularly buy	Special shopping
Attending special personal or family events (e.g. a wedding or graduation)	Attending special personal/family events
Visiting zoos, aquariums or wildlife attractions	Visiting zoos/aquariums etc
Visiting a cathedral, church, abbey or other religious building	Visiting a cathedral/church etc
Long walks, hikes or rambles (minimum of 2 miles/ 1 hour)	Long walks/hikes/rambles
Visiting museums or art galleries	Visiting museums/art galleries
Visiting parks or gardens	Visiting parks/gardens
Visiting historic buildings or monuments	Visiting historic buildings etc
Going to visitor attractions such as theme parks, gardens, famous buildings, museums, zoos etc	Going to visitor attractions etc
Sightseeing / exploring at the coast	Sightseeing/exploring at the coast
Sightseeing / exploring the countryside	Sightseeing/exploring the countryside
Eating and drinking locally produced food and drink	Eating/drinking locally produced food/drink
Sightseeing in a town or city	Sightseeing in town/city

Appendix 2

Excel based results



Valuing activities

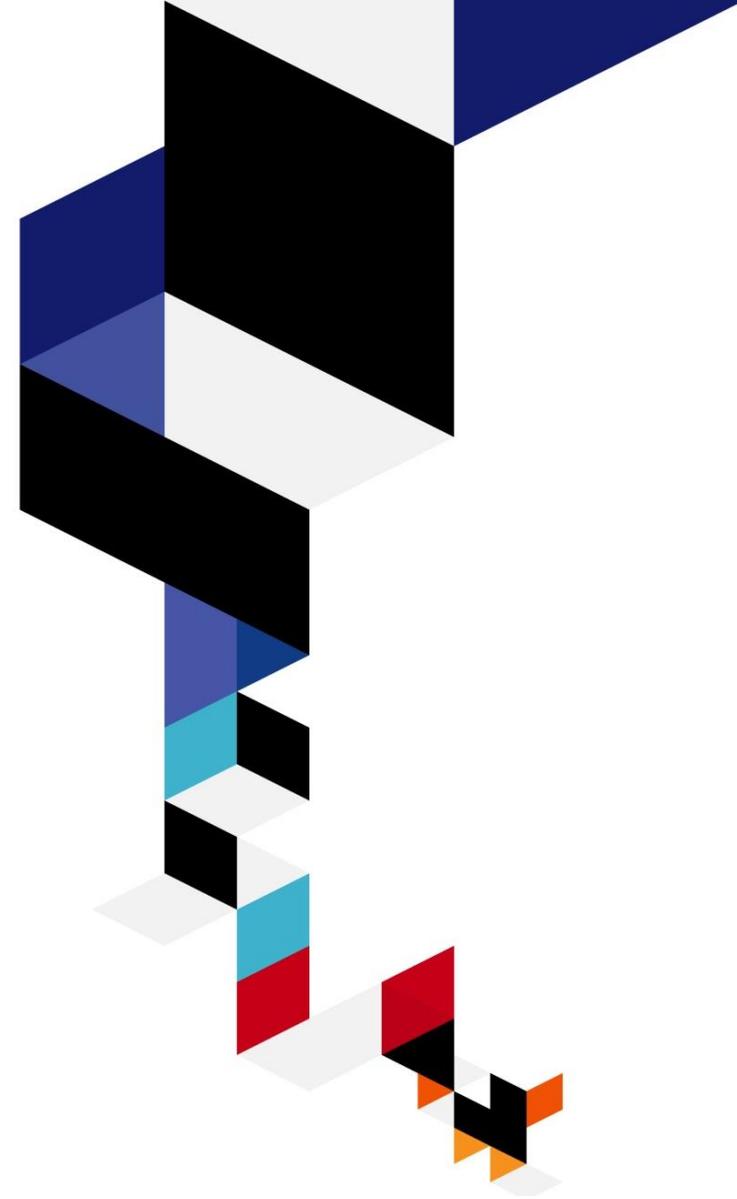
- The full results from this analysis are included in the embedded Excel file below.
- This uses the latest 2012-2014 3 year average data.
- The GBTS and GBDVS input data may be revised in this file (see tab GBTS and GBDVS data) when it becomes available.



Microsoft Excel
Worksheet

Appendix 3

Further analysis of activities data collected in omnibus survey



Analysis of activity groupings

- The omnibus survey data showed that individuals who participate in one activity on a holiday were often more likely than average to have also undertaken other activities. Some of the most significant groupings are shown below (e.g. those who go to the theatre on holidays are more likely than the norm to visit museums & galleries or attend live music events on holidays)

Table 2 – Analysis of activity ‘groupings’ – activities done on domestic holidays

If undertaken on Holiday	More likely to undertake on holidays
Golf	Cycling or mountain biking
Long walks, hikes, rambles	Sightseeing, exploring the countryside
Fishing	Watching wildlife, watersports, golf
Watersports	Golf, fishing, long walks, cycling or mountain biking
Cycling or mountain biking	Golf, long walks, fishing, watersports
Visiting historic buildings or monuments	Visit museums, art galleries, cathedrals, churches etc, visitor attractions, parks, gardens, watch wildlife, sightsee in town/city, explore countryside
Visiting a religious building	Visit museums, art galleries, historic buildings or monuments, visitor attractions, parks, gardens, watch wildlife, sightsee in town/city, explore countryside
Going to visitor attractions	Visit historic buildings or monuments, sightseeing in town/city
Visiting museums or art galleries	Visit historic buildings or monuments, sightsee in town/city
Attending the theatre	Visit museum or art galleries, attend live music or some other festival or event
Visited TV, film or literature location	Watch wildlife, visit zoos aquariums or wildlife attractions
Sightseeing / exploring at the coast	Sightseeing/exploring the countryside
Watching wildlife, bird watching, other nature	Long walks, hikes, rambles, sightseeing/exploring the coast, countryside
Visiting parks or gardens	Visit historic buildings or monuments, visitor attractions, sightseeing in town/city, sightseeing/exploring the countryside
Visiting zoos, aquariums or wildlife attractions	Going to visitor attractions such as theme parks, gardens, famous buildings, museums, zoos etc
Attending live music or some other festival or event	Attending the theatre
Special shopping for items that you do not regularly buy	Sightseeing in town or city, eating and drinking locally produced food and drink

Analysis of activity groupings

- Similar groupings exist in relation to activities undertaken on day visits. For example individuals who have undertaken long walks, hikes or rambles on days visits are more likely than the population average to have also undertaken sightseeing and exploring the countryside on day visits.

Table 3 – Analysis of activity ‘groupings’ – activities done on day visits

If undertaken on day visits	More likely to undertake on other day visits
Golf	Fishing, cycling or mountain biking
Long walks, hikes or rambles	Sightseeing, exploring the countryside
Fishing - sea angling, coarse fishing, game fishing	Golf, watersports, cycling or mountain biking
Watersports including sailing, canoeing, kayaking, windsurfing, etc	Fishing, visited a location associated with a TV series, film or literature
Cycling or Mountain biking	Watching wildlife, bird watching, other nature, golf, fishing
Visiting historic buildings or monuments (e.g. castles, stately homes)	Sightseeing in a town or city, visiting a cathedral, church, abbey or other religious building
Visiting a cathedral, church, abbey or other religious building	Visiting historic buildings or monuments, a cathedral, church, abbey or other religious building, visitor attractions such as theme parks, gardens, famous buildings, museums, zoos etc, museums or art galleries, parks or gardens
Visiting museums or art galleries	Visiting historic buildings or monuments (e.g. castles, stately homes)
Sightseeing / exploring the countryside	Long walks, hikes or rambles
Watching wildlife, bird watching, other nature	Sightseeing / exploring the countryside, long walks, hikes, rambles
Attending live music or some other festival or event (e.g. local food or arts festival, music concert)	Special shopping for items that you do not regularly buy

Analysis of activity groupings

- Comparison of activities undertaken on holidays in the last 12 months with activities undertaken on day visits in the same period shows that, as might be expected, individuals who undertook an activity on a holiday were more likely to have also undertaken this pursuit on a day visit (this is the case across all activities asked about).
- There are also other groupings of activities as shown below. For example individuals who had undertaken cycling or mountain biking on holidays were more likely to have also played golf or undertaken watersports on day visits.

Table 3 – Analysis of activity ‘groupings’ – activities done on domestic holidays V those done on day visits

If undertaken on Holiday	More likely to undertake on day visits
Golf	Cycling or mountain biking
Fishing	Visited a location associated with a TV series, film or literature, watersports
Watersports	Visit a location associated with a TV series, film or literature
Cycling or mountain biking	Golf, watersports
Visited a location associated with a TV series, film or literature	Watch wildlife, visit zoos aquariums or wildlife attractions
Watching wildlife, bird watching, other nature	Long walks, hikes, rambles