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The Value of Activities for Tourism

Introduction

The measurement of activities undertaken during tourism trips is an important element of all the three main tourism monitors – the GBTS (domestic overnight), GBDVS (domestic day visits) and IPS (international tourism). Although the methodologies and types of activity measured vary across surveys, it is relatively straightforward to understand how many trips are taken each year involving a range of cultural, sporting and other types of leisure activity, and therefore to identify expenditure associated with these trips.

However, to date it has not been possible to talk about the *value* of individual activities for tourism. Specifically, there has not been a consistent approach to identifying the extent to which activities motivate trip taking and so can be considered to be generators of trip expenditure.

Why does this matter? As an example, consider two families:

***Family A** spent a week in the Peak District, cycling every day, and spending £2,000 in total. They chose the Peak District because they had heard that there were good cycling routes in the area.*

***Family B** spent a week in the Peak District, also spending £2,000. They chose the Peak District as they enjoy walking and wanted to explore some of the local towns and villages. One afternoon, they walked past a cycle hire shop and spontaneously decided to spend a couple of hours cycling.*

In this example, £4,000 was spent on trips that **included** cycling – but actually, only £2,000 of this was **motivated** by cycling – Family A wouldn't have taken the holiday in the Peak District at all if they hadn't been able to cycle there. In contrast, Family B would have taken the holiday in the area regardless – their decision was completely unrelated to the short cycle trip that they took.

In reality of course, people's trip-taking motivations are more complex than this, and they may well take part in a variety of activities in the course of a single trip, making it hard to calculate spending motivated by individual activities. To address this, the three National Tourist Boards, VisitEngland, VisitScotland and Visit Wales, have worked with research agency TNS to design a new, consistent approach to understanding the value of different types of activity for the tourism industry.

This paper outlines our approach to calculating the **attributable expenditure** associated with a range of tourism activities. By attributable expenditure, we mean

An 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 to take the trip

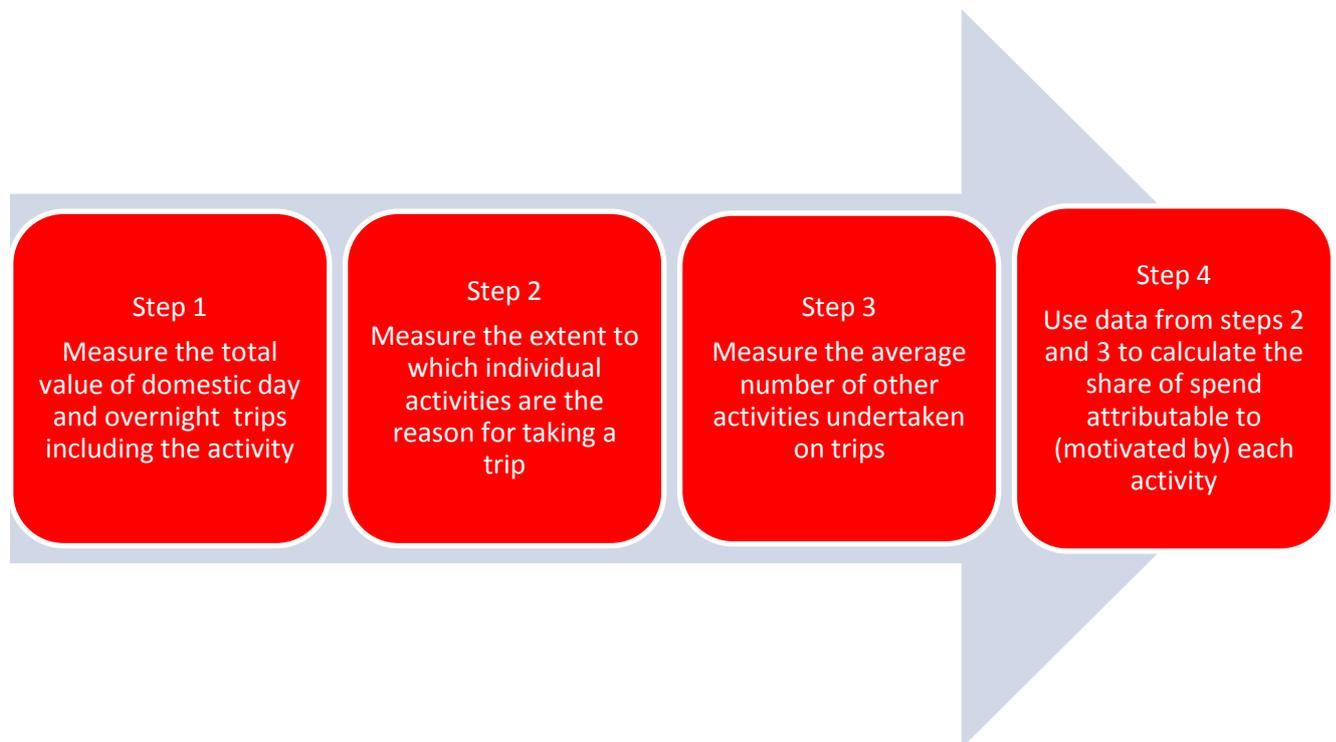


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Attributable expenditure includes money spent on aspects such as accommodation, food & drink, and transport – not just the costs of engaging in an activity such as entrance fees. Another way to think about this is to consider it as money which was only spent in a given destination because it was possible to undertake the specific activity there.

Domestic Tourism (Day Visits and Overnight)

For both domestic overnight and day visits, the calculation of tourism spending attributable to different activities involves four analysis steps.



1. Measure the total value of trips including the activity

Both the GBTS and the GBDVS include a question to ask trip takers which activities they participated in during their trip. Respondents can choose from some 60 different activity options, though for this exercise, we have focused on 22 key activities.

The surveys record the associated spend for each trip, making it possible to calculate the total expenditure on trips which include each activity, shown in Table 1, below.



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Table 1
Expenditure on Trips Including Each Activity - Annual Average 2012 – 2014
Spend £millions

	Domestic Holidays	Domestic Day Visits	Total Domestic
Going to visitor attractions such as theme parks, gardens, famous buildings, museums, zoos etc	£6,074	£5,099	£11,173
Long walks, hikes or rambles (minimum of 2 miles/ 1 hour)	£2,861	£2,347	£5,208
Visiting historic buildings or monuments (e.g. castles, stately homes)	£2,991	£2,097	£5,088
Attending live music or some other festival or event (e.g. local food or arts festival, music concert)	£1,840	£2,952	£4,793
Sightseeing in a town or city	£2,562	£2,095	£4,657
Visiting museums or art galleries	£2,322	£1,950	£4,272
Attending a live sporting event (e.g. football or rugby match).	£379	£3,839	£4,218
Sightseeing / exploring at the coast	£2,122	£1,204	£3,326
Visiting zoos, aquariums or wildlife attractions	£1,485	£1,669	£3,154
Attending special personal or family events (e.g. a wedding or graduation)	£497	£2,507	£3,004
Visiting parks or gardens	£1,237	£1,455	£2,692
Sightseeing / exploring the countryside	£1,431	£1,114	£2,544
Attending the theatre	£722	£1,775	£2,497
Visiting a cathedral, church, abbey or other religious building	£1,266	£898	£2,164
Cycling or Mountainbiking	£563	£666	£1,228
Watching wildlife, bird watching, other nature	£499	£554	£1,053
Played golf	£291	£583	£875
Fishing - sea angling, coarse fishing, game fishing	£435	£228	£663
Watersports including sailing, canoeing, kayaking, windsurfing, etc.	£403	£250	£654



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2. Measure the extent to which individual activities are the reason for taking a trip

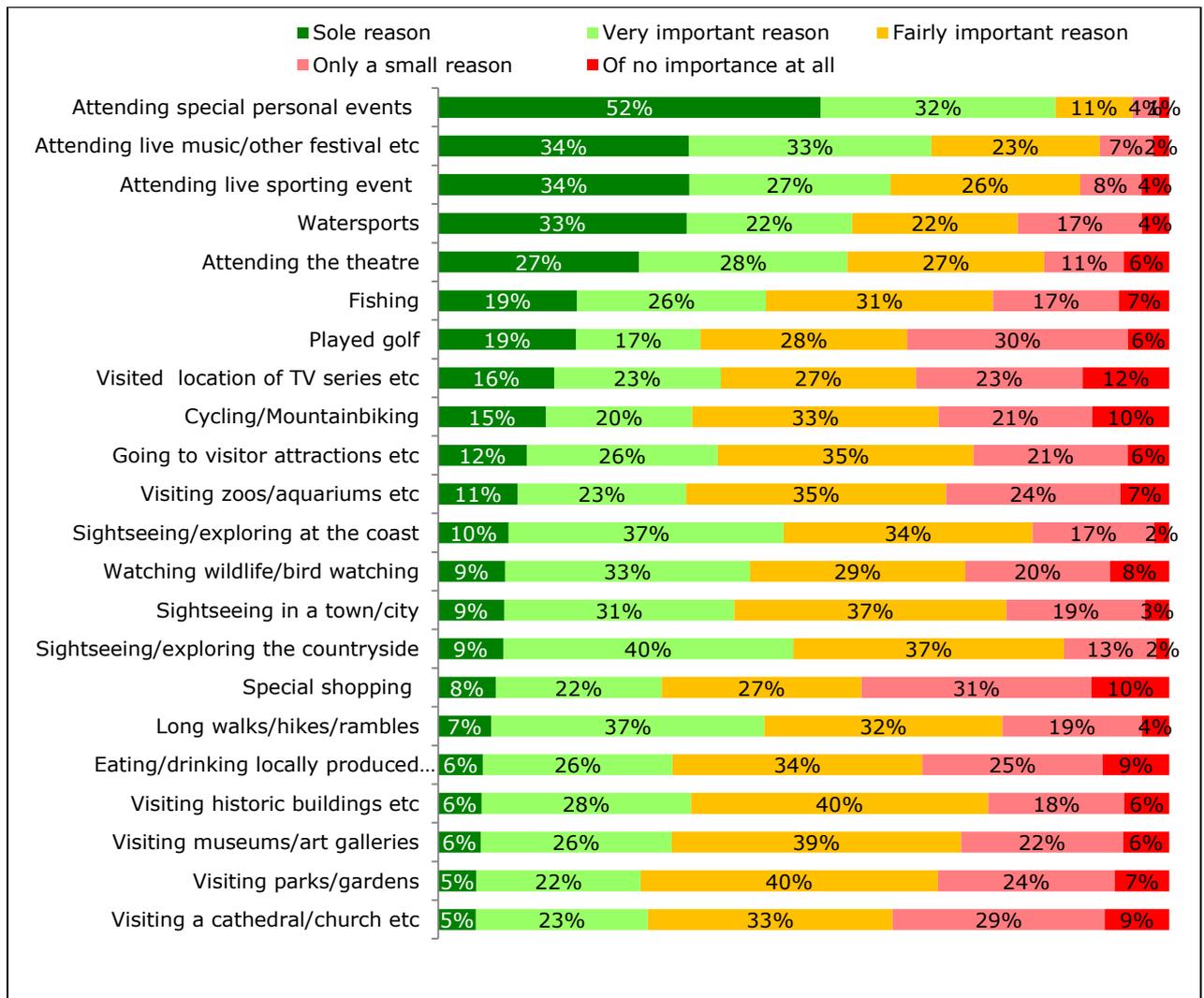
The GBTS / DVS surveys do not include questions about motivations. To address this, new research was commissioned to understand the extent to which different types of trip were a reason for travel.

In total, 2,427 online interviews were conducted in February 2015 among the GB population, with respondents asked to report on trips and activities they had undertaken in the past year.

Respondents were asked, separately for holidays and day trips, to say "how important was being able to undertake these activities in your decision to take the holiday or short break / day trip?"

The chart below shows the results from this question for holidays and short breaks, and highlights a very different degree of motivation for different types of activity, with events often being a prime reason for taking a trip, while shopping, and specific visitor attractions, act as a secondary pull.

Chart 2: Importance of activities in decision to take domestic holiday / short break

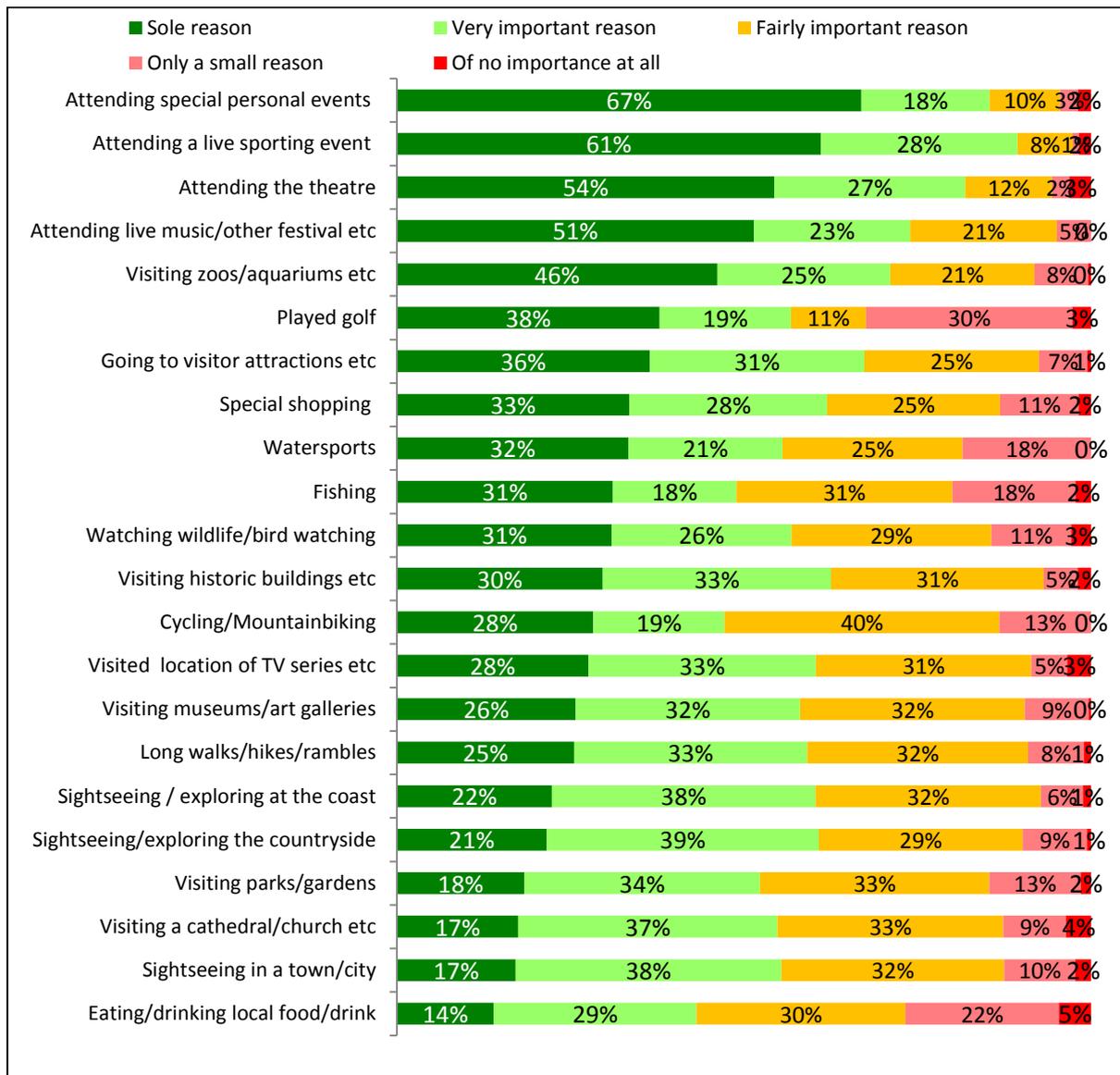




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When it comes to day visits, the motivation profile is much stronger across all types of activity – which is logical, as a day trip is more likely to have a single activity as its focus.

Chart 3: Importance of activities in decision to take a domestic day trip





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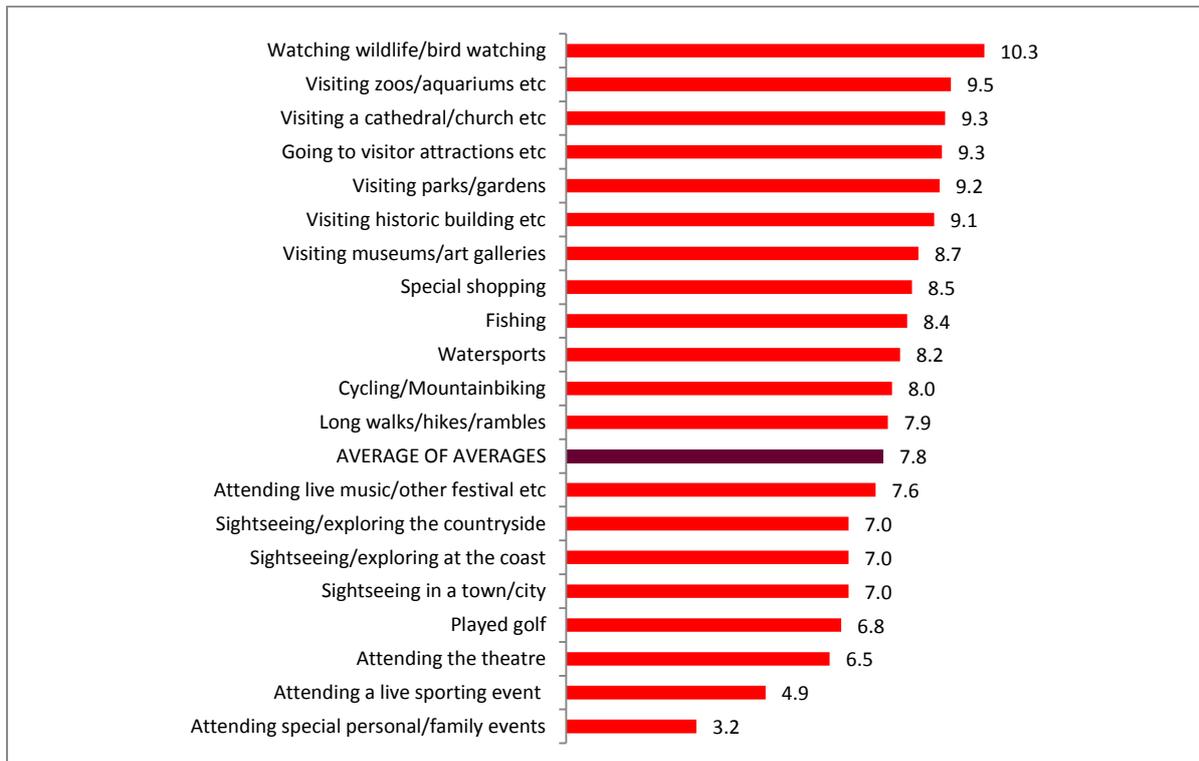
3. Measure the average number of other activities undertaken on trips

When reviewing trip spend data (Table 1), it becomes apparent that adding up the spending across all trips involving the listed activities results in a figure which is actually higher than the total value of tourism in Britain. The reason for this is that a single trip can involve a number of different activities, be it a day trip or an overnight stay. Any estimate of value motivated by activities therefore needs to avoid double counting. A visitor may say that there were a number of activities that influenced the decision to take a trip, and some of these may have been more important than others – but together they cannot account for more than 100% of that visitor’s total expenditure (and in reality, are likely to add to less than this, as other factors such as accommodation choice, past experience or even the weather forecast may play a role).

To take account of that in our calculation of attributable spend, as well as considering consumer motivations, we have also considered the number of other activities that are undertaken.

Chart 4 below shows the average number of activities undertaken by those who say they participated in the listed activity during a holiday or short break. On average, visitors take part in 7.8 different activities on each trip, though there are variations within this by activity type.

**Chart 4 – Average Number of Activities on Domestic Holidays and Short Breaks
(based on all c.60 activities included in GBTS questionnaire)**

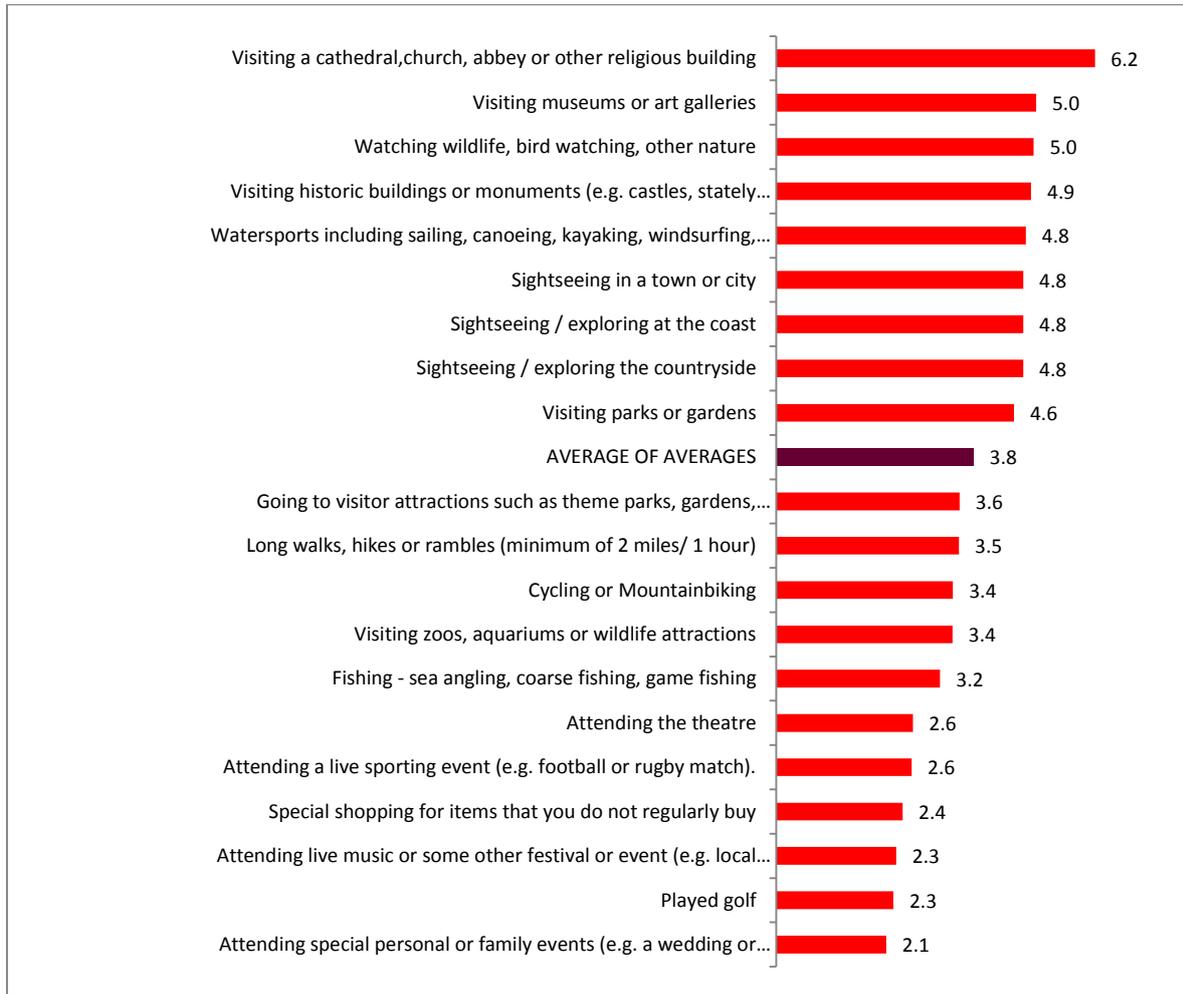




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As might be expected, the average number of activities per day trip is lower than for holiday trips – though even on these short trips which last just a few hours, visitors on average undertake just under 4 different activities.

**Chart 5 – Average Number of Activities on Domestic Day Trips
(based on all c.60 activities included in GBDVS questionnaire)**



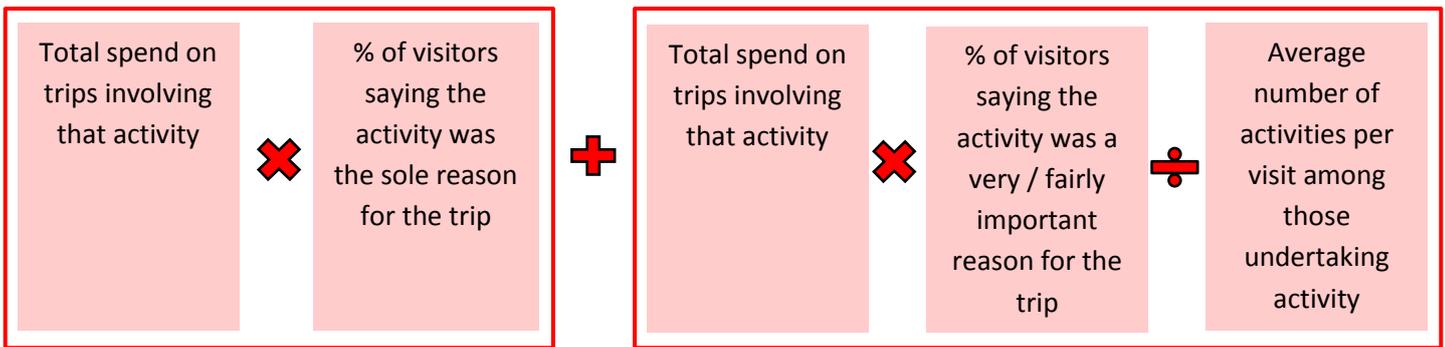


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4. Calculating Attributable Spend for Domestic Trips

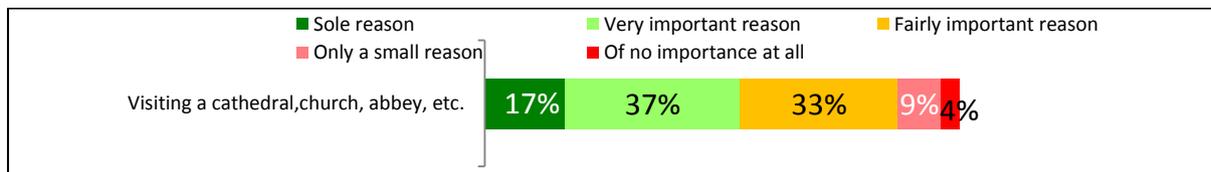
The data in the charts and tables provided above can be used to calculate attributable expenditure for each activity. As a reminder, by this we mean **an estimate of the amount of money spent on day or overnight visits which were motivated by being able to participate in a specific activity when the decision was made to take the trip**

A number of different calculation approaches were tested in the course of the project, but finally it was agreed that the following approach, considering both stated motivations and measured behaviour (number of activities undertaken) represented the best solution for working with the available data.



For example

- In total, domestic residents spent **£898 million** on day visits which included a visit to a cathedral, church or other religious building.
- On average, those visiting cathedrals and churches on a day trip participate in **6.2 activities** in total on the trip
- The motivation profile for churches, cathedrals and other religious buildings is shown below



We can therefore calculate attributable spending as follows:

- £898m * 17% sole reason = £153m
- £898m * (37% very important + 33% fairly important) = £629m
- £629m / 6.2 activities on average = £101m

Total attributable spend for domestic day visits to churches etc = £153m + £101m = **£254 million**



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This method allows us to produce an attributable spend calculation for each activity, listed in Table 6 below.

Note that there is some duplication in this table – for example, trips to visitor attractions may include trips to historic buildings, wildlife attractions, and so on – meaning that results for overlapping categories cannot be summed together.

Table 6 – Attributable Spend on Domestic Trips in Britain
Spend £millions

	Domestic Overnight	Day Visits	Total Domestic
Going to visitor attractions such as theme parks, gardens, famous buildings, museums, zoos etc.	£1,133	£2,654	£3,787
Attending a live sporting event (e.g. football or rugby match).	£169	£2,876	£3,044
Attending live music or some other festival or event (e.g. local food or arts festival, music concert)	£762	£2,073	£2,835
Attending special personal or family events (e.g. a wedding or graduation)	£325	£2,014	£2,339
Long walks, hikes or rambles (minimum of 2 miles/ 1 hour)	£454	£1,029	£1,483
Attending the theatre	£256	£1,225	£1,481
Visiting historic buildings or monuments (e.g. castles, stately homes)	£402	£888	£1,290
Visiting zoos, aquariums or wildlife attractions	£250	£985	£1,235
Sightseeing in a town or city	£481	£665	£1,145
Visiting museums or art galleries	£306	£750	£1,055
Sightseeing / exploring at the coast	£420	£443	£864
Sightseeing / exploring the countryside	£284	£396	£680
Visiting parks or gardens	£148	£477	£625
Cycling or Mountainbiking	£119	£302	£422
Visiting a cathedral, church, other religious building	£142	£258	£400
Played golf	£73	£297	£370
Watching wildlife, bird watching, other nature	£76	£231	£306
Watersports including sailing, canoeing, kayaking, windsurfing, etc.	£156	£105	£261
Fishing - sea angling, coarse fishing, game fishing	£112	£106	£218

This data can be further broken down into the nations and regions of Great Britain – these results are included in the full survey report at <https://www.visitengland.com/biz/resources/insights-and-statistics/market-size-and-value/domestic-overnight-tourism-gbts/gbts-topics>



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Inbound Tourism

Between 2009 and 2011, questions were asked in the International Passenger Survey about participation in a number of activities from a list which changed each year, and, in the same way as the domestic monitors, it is possible to calculate total spending on inbound trips involving different types of activity.

**Table 7 – Spending by Overseas Visitors on Trips Including Each Activity
Historical Prices 2009 – 2011**

Went shopping	£12,092
Visiting parks or gardens	£7,826
Visiting castles / historic houses	£6,506
Visiting museums or art galleries	£6,255
Visiting a religious building	£4,948
Exploring towns / villages / other locations	£4,410
Went to countryside / villages	£4,205
Coast	£2,957
Theatre / opera / musical / ballet	£2,748
Live music event	£1,705
Attending a live sporting event	£1,128
Visiting zoos	£872
Walking	£726
Visited a location associated with a TV series, film or literature	£609
Cycling or Mountainbiking	£497
Played golf	£444
Watersports	£165
Fishing	£144

Calculating Attributable Spend

As no additional research about motivations has been carried out in overseas markets, it is not possible to calculate attributable spending by applying weights based on stated reasons for visiting. Instead an approach has been used which is similar to that used previously by VisitBritain to estimate the value of culture and heritage to the UK.

Step 1

For each respondent, spending data has been weighted according to the purpose of their visit, as follows:

Trip Purpose	Maximum % of spend attributed to activity
Holiday	100%
VFR	50%
Business	25%
Other	25%

This recognises that while those on non-leisure trips may well undertake a number of activities outside their main trip purpose, whether business, study, or visiting friends or relatives, it is unlikely that their trip was principally motivated by these additional activities

Step 2

In a second step, data has been further weighted according to the number of activities undertaken by each visitor. Where an activity was one of 5 activities undertaken by a visitor, for example, then 20% of their spend was counted; if it was one of ten activities undertaken, then 10% of spend was counted.

Note

This approach is by necessity less differentiating than the approach used for domestic spending, as it does not include any consumer data relating to degree of motivation. Figures should therefore be regarded as being a broad estimate to aid understanding, rather than a precise reflection of impact. The 2015 International Passenger Survey includes questions about reasons for visiting the UK, and in future it may be possible to use results from the survey (available mid 2016) to further refine results.

It should also be noted that wording describing activities differs between the domestic and inbound monitors. Where results are compared, we have used the closest equivalent from each survey.



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Table 8 – Attributable Spend on Inbound Trips in Britain
Spend £millions

Went shopping	£2,494
Visiting parks or gardens	£1,177
Visiting castles / historic houses	£909
Visiting museums or art galleries	£889
Exploring towns / villages / other locations	£886
Visiting a religious building	£652
Went to countryside / villages	£550
Coast	£487
Theatre / opera / musical / ballet	£364
Live music event	£305
Walking	£286
Attending a live sporting event	£137
Visiting zoos	£116
Cycling or Mountainbiking	£99
Played golf	£85
Visited a location associated with a TV series, film or literature	£65
Watersports	£56
Fishing	£56



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Total Attributable Spend – Domestic and International

By adding together results from the domestic and overseas approaches, it is possible to arrive at a total measure of attributable tourism spending for a range of activities.

These figures are shown below, and while it must be remembered that there are differences in approach for the different data sets, this provides at least an initial indication of the total value of tourism spending generated by different types of activity.

Table 9 – Total Attributable Spend on Activities in Britain
£ million

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

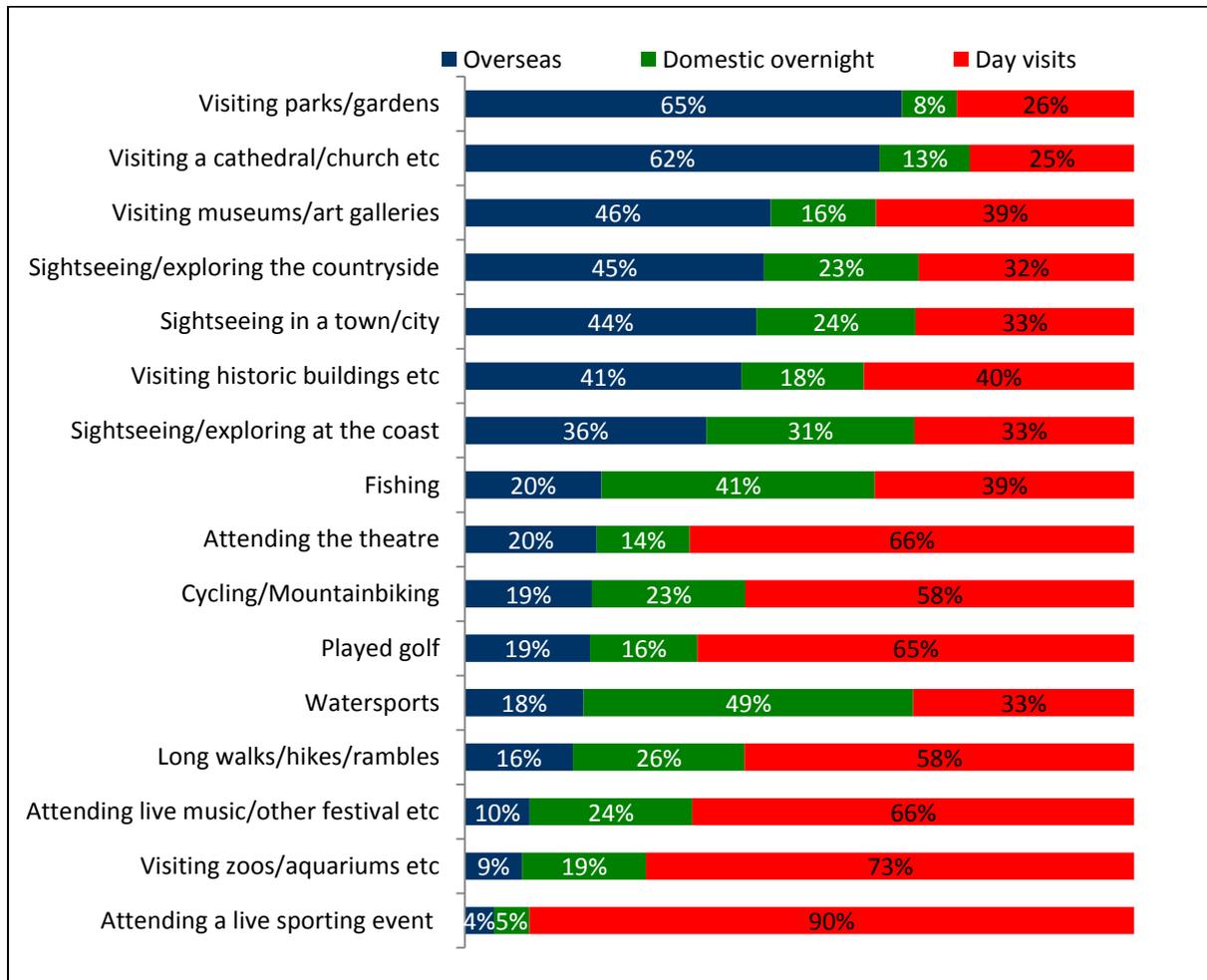
*Domestic Only



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It is clear that different activities play differing roles in motivating inbound, domestic overnight and day visit tourism. For those activities where data is available for all three visitor data sources, it is possible to review the share of attributable spend by visitor types. This highlights, for example, that pursuits related to history and heritage are relatively more important in driving spend from overseas visitors, while those relating to outdoor leisure tend to be a greater motivator for the domestic visitor.

Chart 10
% Share of Attributable Spend by Visitor Type





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Summary

The range of activities available in Britain plays a vital role in motivating tourism trips, both from domestic and overseas audiences. For a number of years we have had evidence of participation levels in different activities, but until now, there has been no consistent approach to understanding the relative importance of different activities in driving tourism spending.

The analysis presented in this paper provides an approach to better estimating the tourism expenditure value generated by a number of activities. There are limitations to this – it has not been possible to consider the full diversity of activities on offer, and the lack of data to understand the motivational pull for the international visitor means that the calculations can only be viewed as an approximation.

Even so, we feel that this represents an important first step in better understanding the role different activities play within the visitor economy. We will aim to review and refine the analysis over time, and would welcome feedback and insight from other data sources to help do this.

For more detail about the approach used, including a regional breakdown of the domestic attribution data, please see the detailed research report at

<https://www.visitengland.com/biz/resources/insights-and-statistics/market-size-and-value/domestic-overnight-tourism-gbts/gbts-topics>