

First Steps Tourism Satellite Account for the UK

The Landscape for TSA Development

Calvin Jones, Max Munday
Welsh Economy Research Unit
Cardiff Business School

In this Presentation

- TSA construction: the recipe and ingredients
- Brief detail on the prime data sources
- Data gaps and limitations
- The institutional framework
- Going forward – recommendations & resourcing
- Conclusions – What is needed to create a reliable and useful account?

The TSA Recipe (1)

- Take three or four tourism consumption surveys (depending on how many tourist types, to taste)
- Slice finely according to commodity consumed (a sharp knife will be needed – some ingredients will be very difficult to cut)
- Mix the results together; label the resulting paste *internal tourism consumption*
- Take a variety of disparate industries from the national economy. Examine them carefully and cut them finely, (as earlier). Be careful here; the labels may not reflect exactly what is in the tin

The TSA Recipe (2)

- Add these to a separate pot. Now sprinkle exotic spices (called 'imports'). Examine other recipes to determine the proportions to add (and hope this doesn't ruin the taste).
- Finally, add taxes and drain away any subsidies. Label this pot *domestic supply of tourism products*
- Mix internal tourism consumption with domestic supply. Garnish with derived variables (tourism ratios, tourism value added etc.)
- Serve immediately. Or at least within five years

The TSA Ingredients: Demand

UK Tourist Statistics;

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Project*

International Passenger Survey
(expenditure trailer);

GB Leisure Day Visits Survey

Issues:

Concepts, responsibility and methodology vary between surveys,

Consumption questions only part of wider profiling surveys,

Coverage varies – target groups, geography, timescales etc.,

Inadequate resource over long period – sample size issues,

Thus of limited use for sub-national TSA derivation,

Lack of strategic vision for consumption data

The TSA Ingredients: Supply

UK Input-Output Tables;

Annual Business Inquiry

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Issues:

Poor identification of tourism industries in Input-Output publications

Lack of timeliness of published IO data, particularly analytical tables

ABI Coverage issues – e.g. micro businesses

Sampling/stratification may cause problems (especially sub-national)

Limited number of variables – and little info on imports

The Institutional Framework

Consumption data: who is responsible?

- Great Britain Day Visits Survey 2002/3. A survey undertaken by the **Countryside Agency**, Countryside Council for Wales, **British Waterways**, **Department for Culture, Media and Sport**, **Environment Agency**, **Forestry Commission**, **Scottish Natural Heritage**, **VisitBritain**, **VisitScotland** and **Wales Tourist Board**.
- The UK Tourist 2002. **VisitBritain**, **VisitScotland** and **Wales Tourist Board**
- Travel Trends. Office for National Statistics

Issues: Responsibility fragmented, surveys under-resourced. Non- involvement of ONS compromises quality and credibility

Selected Recommendations (1)

- ***(a) institutional & structural developments:***
- that a second iteration of the TSA should not be undertaken in advance of data improvements and institutional developments;
- that if data cannot be improved in the medium term then this First Steps estimation be repeated in 4-5 years using the best available data;
- ONS be centrally involved in TSA development, both providing technical support and aiding strategic direction. This assumes ONS will be unable to develop the TSA in-house which is the ideal scenario;
- the creation of a Tourism Statistics Unit for the UK, as recommended in the Review of Tourism Statistics, be urgently investigated

Selected Recommendations (2)

- ***(b) data quality improvements:***
- the collection of information on tourists' expenditure be carried out in more detail, and given more prominence in the surveys of tourists in the future;
- that if existing surveys are to continue, the improvements suggested in the *Review of Tourism Statistics* be undertaken as far as is practicable;
- moves to harmonise the expenditure disaggregations and conceptual framework of IPS, UKTS and GBDVS be explored.

Concluding Remarks

- First Steps UK has shown it is possible to construct a TSA with *reasonable* results but cannot assess *accuracy* or *reliability*;
- Has highlighted significant limitations in existing data supporting UK TSA;
- Fully developed UKTSA will require:
 - *Clarity of responsibility and fuller involvement of ONS*
 - *Significant re-engineering of consumption data sources & re-specification of supply side data*
 - *Reaching out to private sector to lever intelligence & ensure usefulness*
 - *Ongoing commitment in terms of resource, staff & structures*