

A Scottish TSA



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Scottish TSA project

- Scottish Executive
 - Central Government
- VisitScotland
 - National Tourism Organisation
- Scottish Enterprise / Highlands & Islands Enterprise
 - Economic Development Agencies

Demand for Scottish TSA data

- Inform statements made about the sector's contribution to the economy.
- Economic baseline to monitor effect of policy interventions.
- Scottish Enterprise analysis of industry linkages to inform development strategies and identify key stakeholders.
- Feed into VisitScotland forecasting, trends and scenario planning (Moffat) model.
- Inform Scottish Executive tourism targets.

Tourism targets

2002 Spending Review

- *To establish a method by 2004 to assess the contribution of tourism to the Scottish economy; and to identify how this contribution could be increased.*

2004 Spending Review

- *Year on year real terms increase of Scottish tourism Gross Value Added (GVA) to end 2007.*

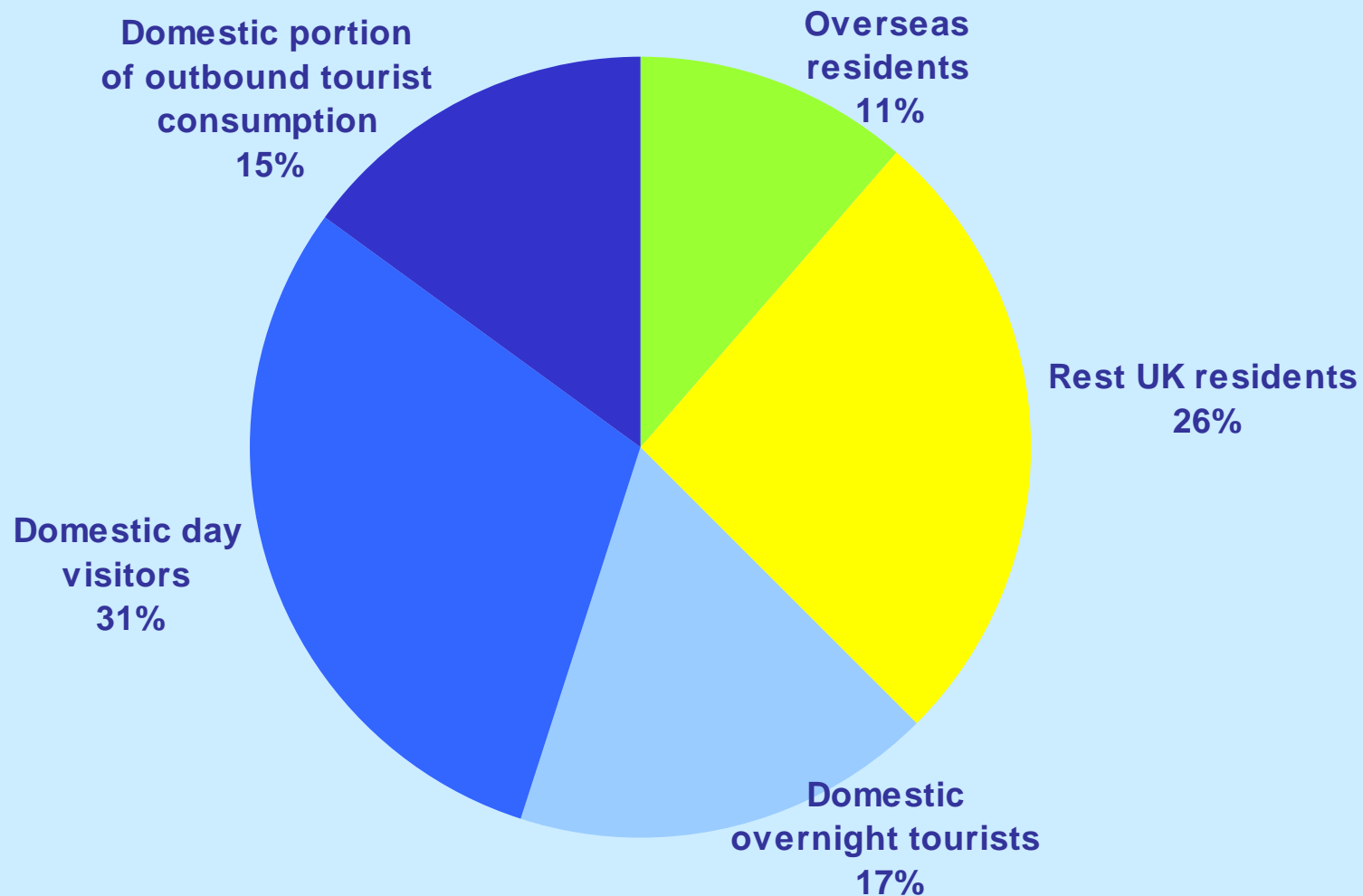
Scottish TSA project

- Phase 1 – scoping study by Prof Iain McNicoll, 2002-03
- Phase 2 – detailed analysis of tourism data for Scottish input-output tables
- Phase 3 – publication of provisional TSA tables for 2000 in October 2004
- Phase 4 – further development work

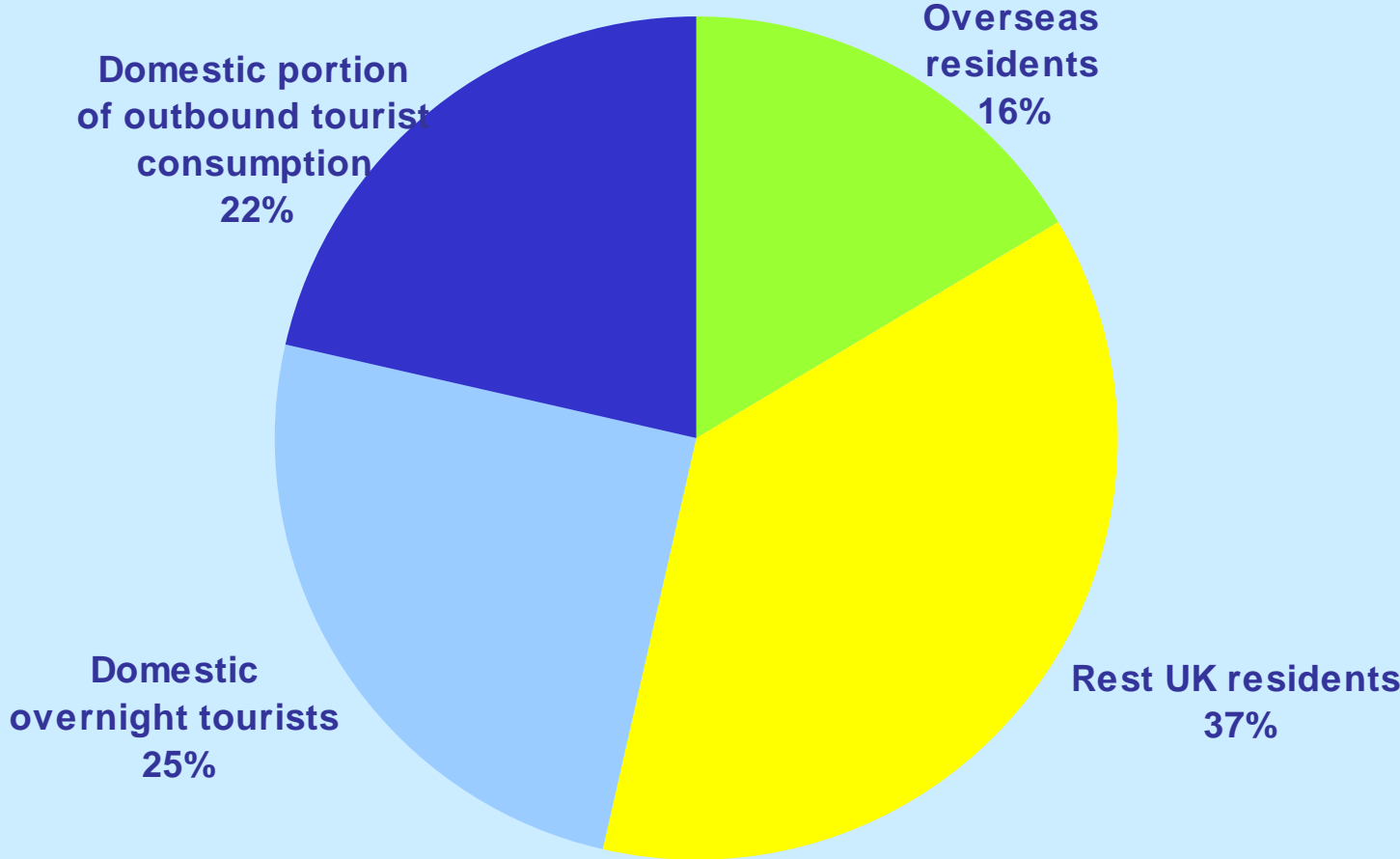
Provisional TSA results

	£million	Percentage
INTERNAL TOURISM CONSUMPTION	7,423	100%
Overseas visitors	845	11%
Rest UK visitors	1,908	26%
Domestic visitors	3,493	47%
Overnight visitors	1,283	17%
Same-day visitors	2,210	30%
Domestic portion of outbound spend	1,106	15%
Second homes on own account	71	1%
TOURISM PRODUCTION		
Direct tourism gross output	3,531	
Direct tourism value added	2,033	
<i>proportion of GVA</i>		3.0%
TOURISM EMPLOYMENT	Jobs	
Tourism dependent employment	130,000	
<i>proportion of total employment</i>		5.2%

Total tourism final expenditure in cash, Scotland, 2000 by tourist type



Total tourism final expenditure in cash, Scotland, 2000 by tourist type (excluding day visitors)

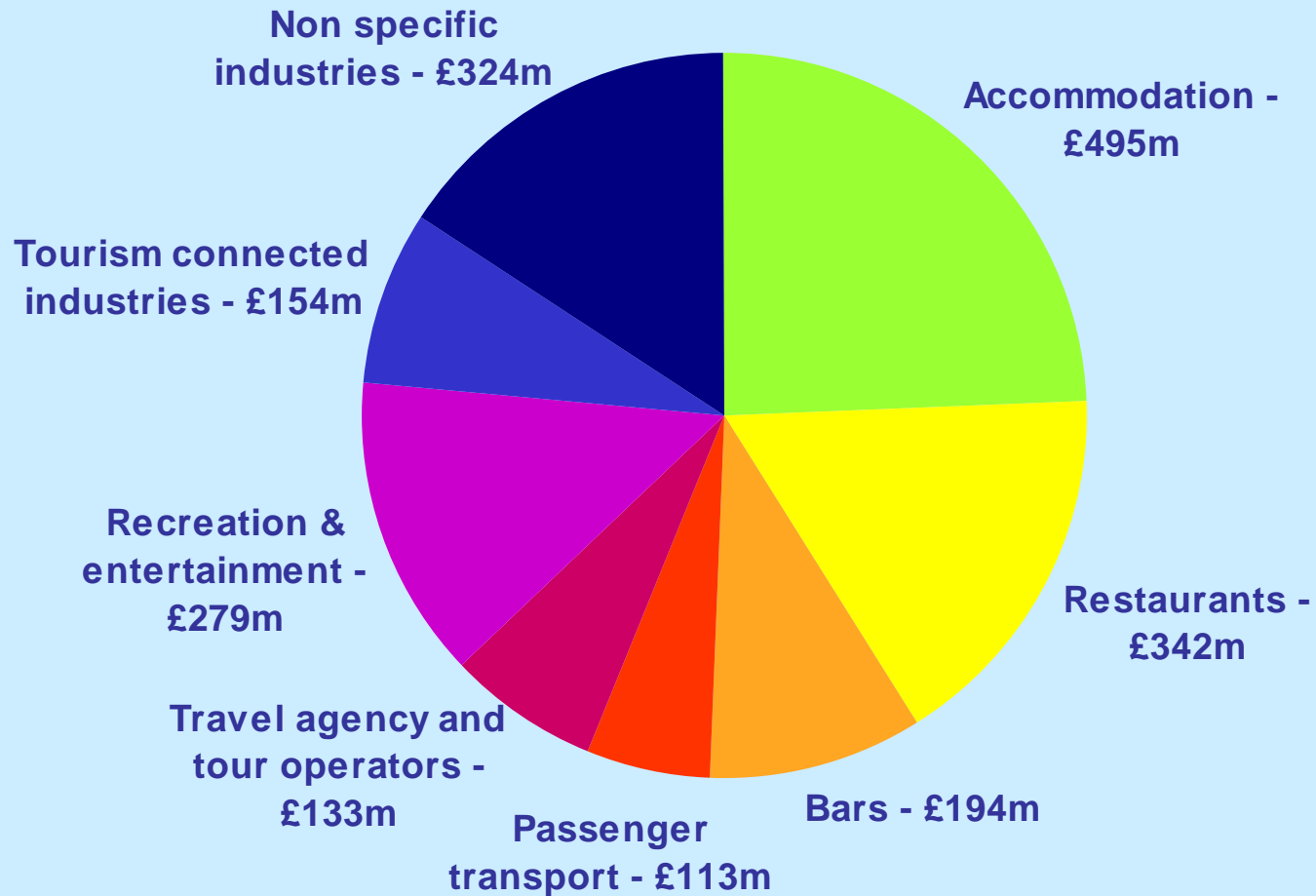


Excluding day visitors

- GVA £1.59 billion (2.4%)
- Employment 99,000 (4.0%)
- Proportion of total industry output for tourism

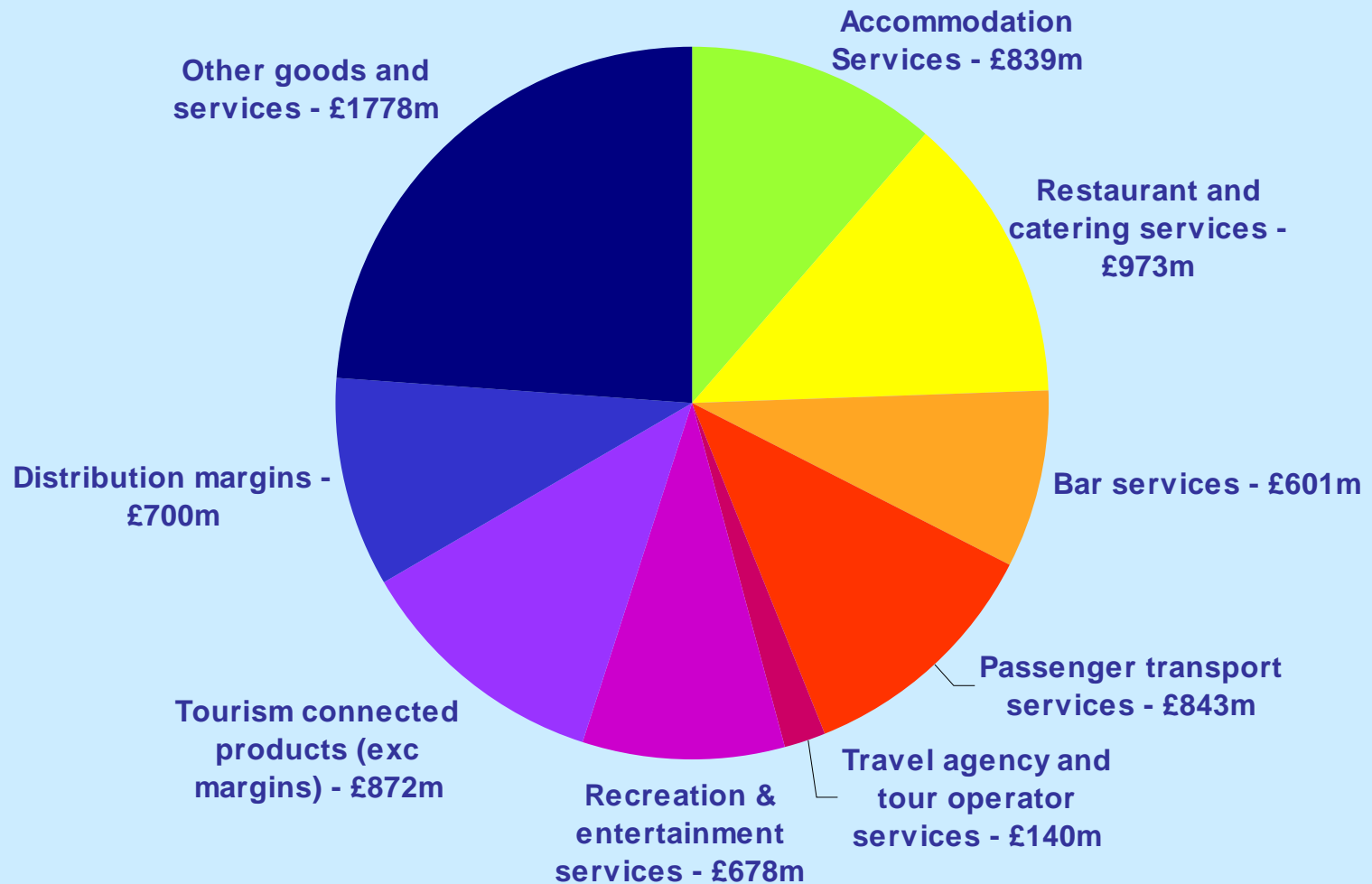
	Restaurants	Bars
Including day visitors	61%	45%
Excluding day visitors	37%	30%

GVA generated directly by tourism in Scotland, 2000



Tourism GVA = £2,033m, or 3% of Scottish GVA

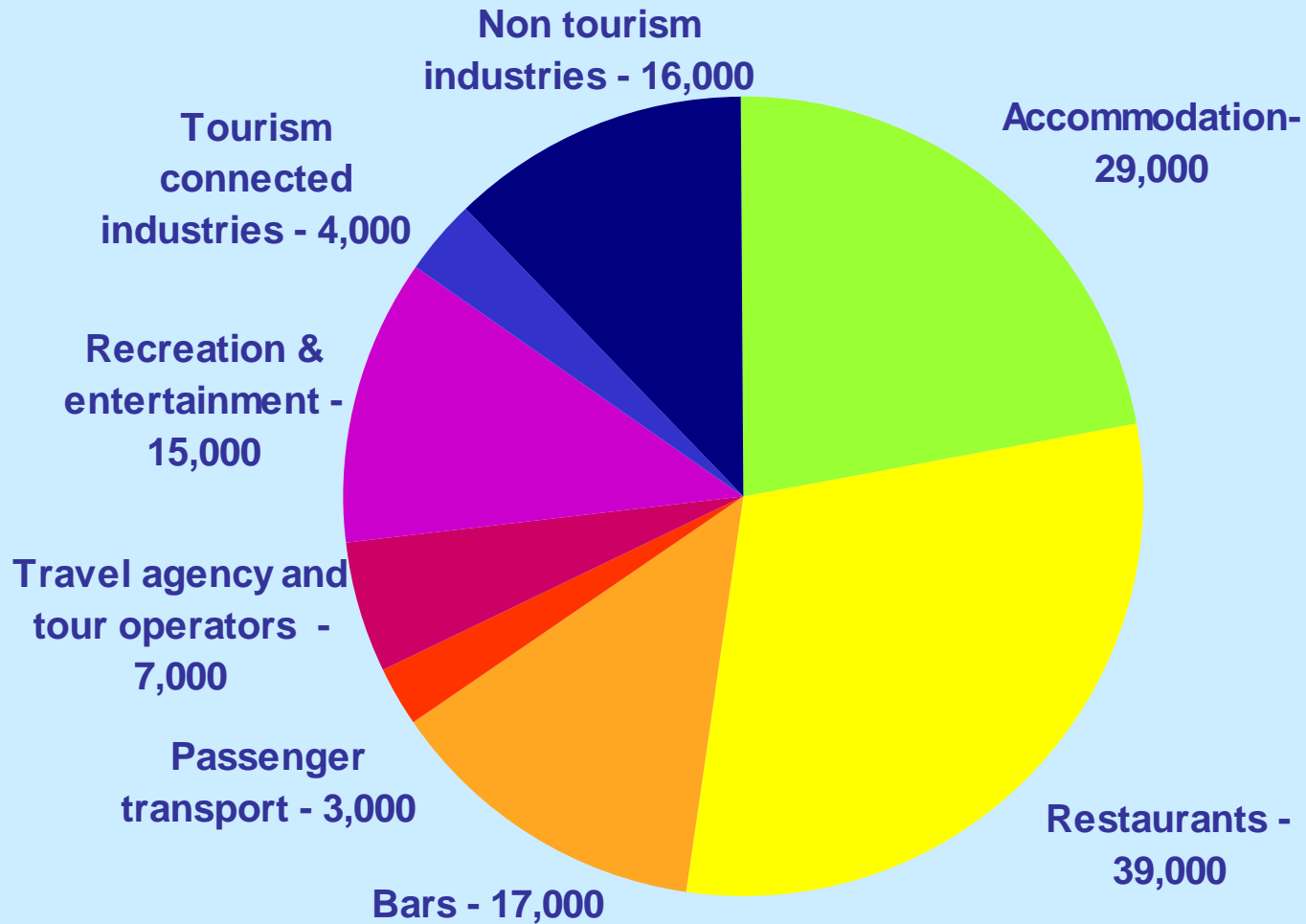
Total internal tourism consumption in Scotland, 2000 by expenditure category



Total internal tourism consumption = £7,423m

- Accommodation accounts for 11% of tourist expenditure but the accommodation industry contributes 24% to tourism GVA.
- Because day visitors do not pay for accommodation and tend to spend more on imported goods, their contribution to tourism GVA is relatively less than overnight tourists.

Tourism employment in Scotland, 2000



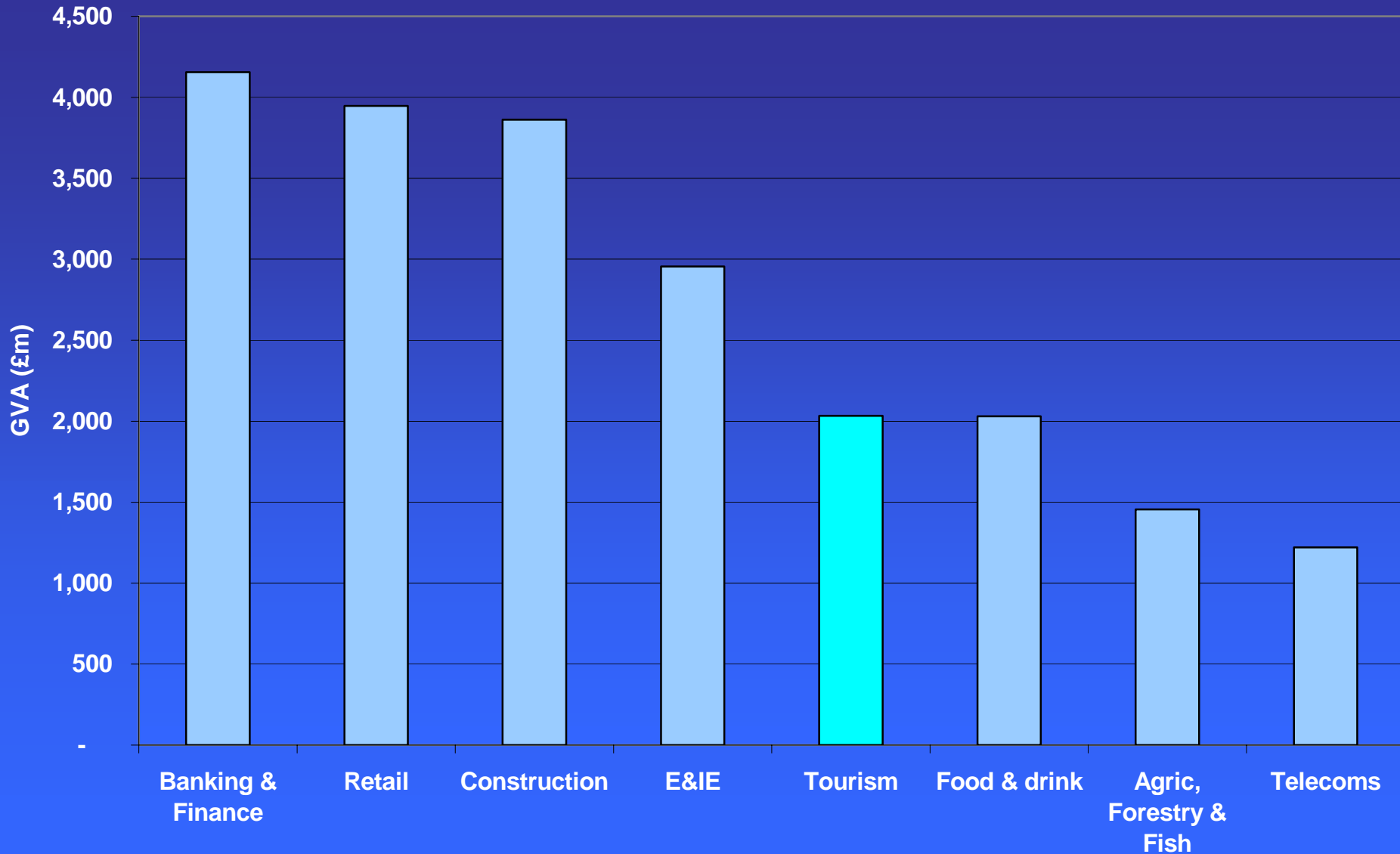
Total tourism employment: 130,000 jobs = 5.2% of total employment

Tourism connected industries

- Post & telecoms
- Jewellery
- Rental services
- Knitted goods
- Refined petroleum products
- Confectionery



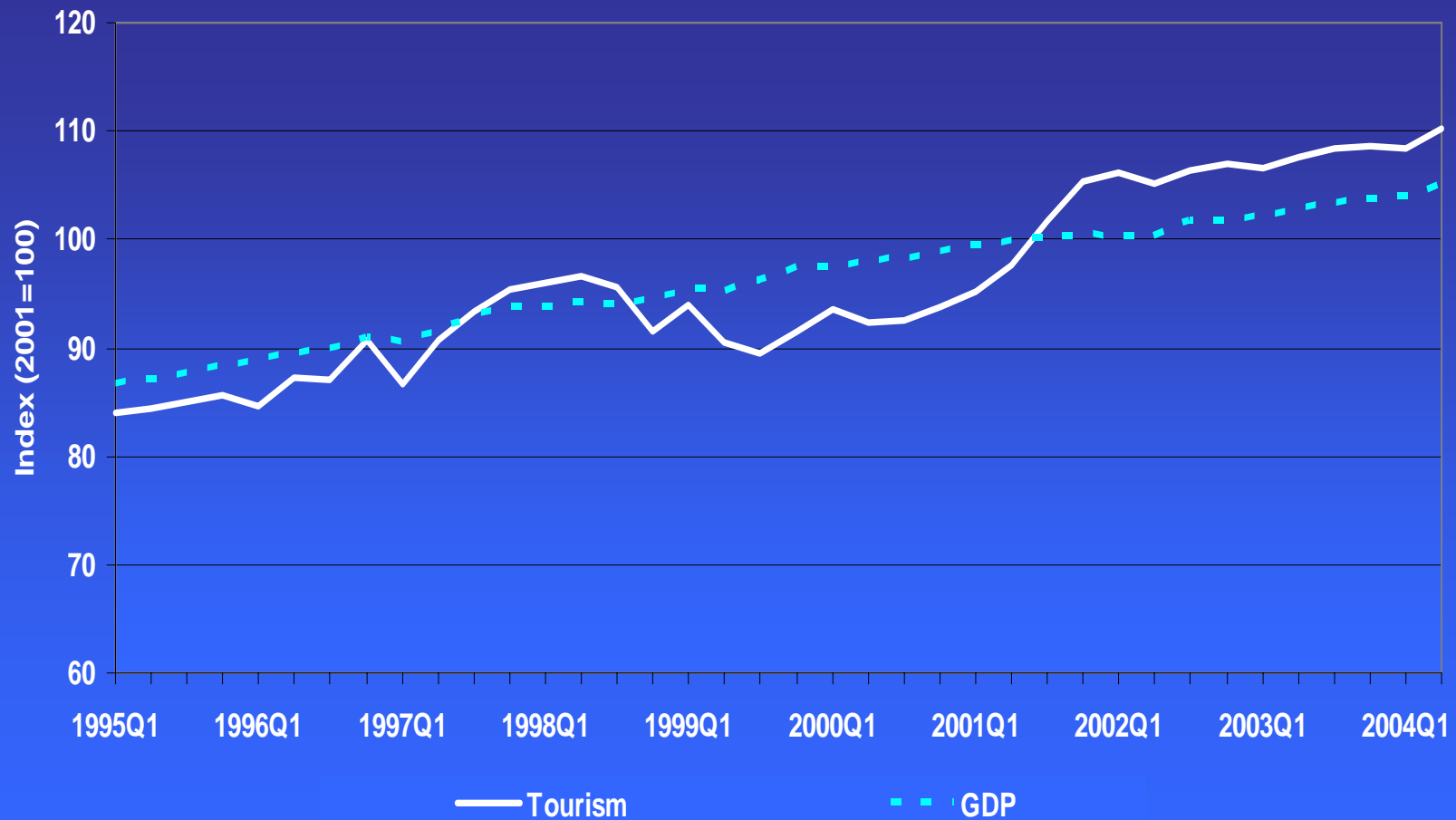
Tourism in the Scottish Economy



Tourism Index

- Derived from TSA information and quarterly Scottish GVA index
- Will give quarterly estimates of growth in output due to (overnight) tourism
- Provisional figures including day visits indicate annual average growth of 3% since 1995

Scottish tourism index and GDP



Potential future work....

- Further development of tourism index, excluding day visits.
- 2001 TSA on similar basis to 2000 but with some data improvements.
- Consider potential to include Public Sector contribution.
- Business tourism.
- Investigation of pre and post-trip spend.
- Improved expenditure data.

