

Review of Tourism Statistics Implementation Plan

Contexts

Overriding considerations in the Review

- A. i) The Review comprises a total of 66 recommendations, presented under 14 areas. Only one of these is burden/cost neutral.
ii) The Review found that Tourism Statistics have been under-resourced¹, and it calls for substantial additional expenditure (£8m p.a.²) Much of this is to produce 2 of the 5 main surveys to a substantially higher quality.
iii) It is universally accepted that improvements are needed, though all indications have been that only a substantially smaller sum might be made available. Any Central Government contribution will depend on final allocations following the 2004 Spending Review.
- B. The Review notes that at present, responsibility for Tourism Statistics rests across a number of organisations. It goes on to recommend a dedicated, central, financially ring-fenced Tourism Statistics Unit³.

Implications for this Implementation Planning

- A. Until there is clarity on the level of additional funding, it is not possible to put timescales for implementation, let alone state what will be in forthcoming work plans.

It is nevertheless possible to appraise the validity and priority for recommendations, and this is the approach taken.

To achieve this, as well as to start discussions about funding, DCMS convened an Implementation Planning group comprising public sector organisations through which tourism surveys are currently funded, plus those which might wish to fund in the future.

- B. Also for this reason, DCMS requested an extension to six months for the production of this Implementation Plan in response to the Review Report.

¹ See Review Report 5.7.2

² See Review Report 1.65, 6.7.1 & 6.7.13

³ See Review report 5.7, 6.7.1, 6.7.2

Implementation planning – outputs

Therefore this output of the Implementation Planning Group takes the form of comments alongside the 14 main areas of recommendation.

It was felt that it would not be especially helpful to comment against each of the 66 individual recommendations. The Tourism Statistics Unit, if established, will form work plans on the basis of all the Review's recommendations and should be guided by the analysis that follows in this document. These will naturally be framed in terms of available resources, any evolution of needs, and taking advantage of any opportunities that arise.

The Implementation Planning Group does recommend however that, if a TSU is instituted, that a detailed proposal answering to all 66 recommendations is produced – in the context of work plans – and that this is reviewed to the specification of the Advisory Committee, and that conclusions are published by the end of 2006, with an interim report in by the end of 2005.

Modest budget scenario

The Review's report acknowledges that the resources available may be substantially less than the £8m for which it calls. Thus it suggests a programme of "valuable – if less fundamental improvements" which might be achieved for £500,000 per annum.

Crucially, this does not cater for improvement of either UKTS or the Day Visits Survey. The need for improvement of the former has become substantially higher since the Review consulted, following unexpected trends being reported in 2003 data.

The Implementation Planning Group believes that some low cost wins in preparation toward the production of future Tourism Satellite Account estimates, and improved timeliness of the Occupancy Surveys should also be possible with little additional cost.

The Implementation Planning Group had intended to develop other scenarios, but lack of time meant that this was not possible. Indeed recommendations on how to spend increments of funds might not have provided such a clear picture of exactly which extra recommendation would in turn become possible. This is since with less funds it might be beneficial to achieve whatever combination of part-successes across a number of recommendation, rather than having areas of no progress at all in some areas, where some lo-cost win might have been possible. A TSU's work plans will take account of these.

The comments of the Implementation Planning Group are noted against each of the 14 main areas of recommendation - which follow – should permit sound planning by a Tourism Statistics Unit.

Annex 1 – Response to individual recommendations

N.B. It may be assumed that unless indicated to the contrary, the group accepted the findings of the Review.

Recommendation <i>(with the average priority for each Recommendation area)</i>	Response
<p><u>Recommendation 1: (High)</u> UKTS and LDVS should be subject to a major redesign which should inter alia:</p> <ul style="list-style-type: none"> a) Ensure adequate sample frames and response rates b) Consider a merger of the two surveys c) Consider merging the surveys with ONS’s planned Continuous Population Survey d) Produce more frequent statistics for day tourism e) Cover those business trips that qualify as day tourism. <p>Full implementation of this recommendation, which is important to the fundamental quality of the basic statistics of tourism activity, will be both relatively long term and expensive: perhaps up to 5 years and, when the new surveys are implemented, an additional £7m per annum. However, detailed consideration could lead to some reduction in the additional cost (e.g. if the two surveys can be successfully combined).</p>	<p><u>UKTS</u> – It was proposed, and agreed, that changes to the UKTS were the number 1 priority. It was noted that this survey’s credibility has been eroded further since the considerations of the Review. If available funds are limited, it may be that these are entirely directed to improvements to this survey.</p> <p>The need for a major redesign giving more accurate, timely data is universally accepted. This will probably involve reduction of recall period from current 2 months. To minimize discontinuities, there should be 1 integrated change of methodology.</p> <p>ONS has advised that integration with the Continuous population survey will not be possible for several years.</p> <p>Thus, this should be considered in the longer term, along with assessment of the feasibility of merging with the measurement of <u>Day Visits</u>.</p> <p>The Implementation Group:</p> <ul style="list-style-type: none"> - considered the production of regular (more frequent than annual) Day Visits estimates to be of a lower priority. - noted that limited funds and the wide focus of days visits surveys, have together meant that the quality of volume and value estimates of Tourism Day Trips has been poor.

<p><u>Recommendation 2: (High)</u></p> <p>a) Some interim improvements should be made to the LDVS so that:</p> <p>b) More frequent statistics are produced</p> <p>c) A higher response rate is achieved</p> <p>d) Business trips qualifying as day tourism are covered</p> <p>e) The survey focuses more tightly on tourism and less on other leisure activities</p> <p>Such development could to some extent be tailored to available resources. A significantly improved survey should be achievable with about £2m per annum.</p>	<p>The Implementation Group noted that:</p> <ul style="list-style-type: none"> - At present no organisation with Tourism responsibilities is committing funds to the measurement of Day Visits. - The Countryside Agency is continuing with some measurement with a slimmed down survey and consortium. - Regular programmed funds are required. - The quality of the previous collections is questionable. This was largely due to budget, but lack of staff time to oversee the survey may have also contributed. - For any given budget, quality should be given priority over frequency of data.
<p><u>Recommendation 3: (High)</u></p> <p>The IPS should be improved as a source of tourism statistics.</p> <p>In particular:</p> <p>a) The analysis of the survey should more closely follow standard tourism definitions</p> <p>b) The expenditure trailer should be included more often</p> <p>c) The sample structure and grossing methodology should be revised to provide viable sub-UK statistics.</p> <p>The second of these would cost about £150,000 for each year in which the trailer was included while the third might cost in the order of £100,000 per annum, plus some set up costs, for interviewing at additional ports.</p>	<p>a) There are some discrepancies between the UK surveys and standard (international) tourism definitions. ONS has noted that the ideal formulation of the survey has to also take account of Balance of Payments and Migration Statistics needs, and an interview length that does not overly affect response and completion rates</p> <p>b) ONS remains willing to conduct this, if the funding is raised. It would be central to any future iteration of TSAs.</p> <p>c) The fluctuating statistics that arise in sub-UK outputs is a major shortcoming in tourism statistics system. The IPS is not currently designed to produce sub-UK statistics. Changes apparently cannot be made until a new IT system is in place (scheduled end 2005).</p> <p>The overdue NS Quality Review of the IPS is currently indefinitely postponed. The Implementation Planning Group agreed to call for a review to take place at the earliest opportunity, as this should greatly assist implementation of recs 3a and 3c.</p>

<p><u>Recommendation 4: (High)</u> The registers of accommodation and other tourism businesses should be improved to provide:</p> <ul style="list-style-type: none"> - Valuable information in their own right - An improved basis for UKOS - A basis for proposed development of local statistics - Improved input to models of local volume and value of tourism. <p>It is estimated that this might cost in the region of £300,000 (plus annual maintenance costs).</p>	<p>The Implementation Planning Group agrees with the need and the various benefits of an improved register of accommodation.</p> <p>The group agreed that this should be of medium to high priority.</p>
<p><u>Recommendation 5: (High)</u> UKOS should be improved to cover all types of commercial accommodation and provide viable statistics of occupancy and visitor nights.</p>	<p>UKOS suffers from variable quality and timeliness among regions of England. The Group agreed that minimum standard for this data must be raised. If the contract stays with English Regional Tourist Boards, there should be a clear standard and mechanism by which central financial support can be quickly terminated.</p> <p>UKOS is currently funded by National Tourist Boards. Regional Development Agencies or Tourist Boards might be asked to part fund, given that the National requirement (including to Eurostat), is over-delivered by the current arrangements.</p> <p>It was agreed that serviced accommodation is first the first priority for occupancy surveys.</p>
<p><u>Recommendation 6: (Medium)</u> SVVA should be amended to focus more on the quality and completeness of its statistics of visitor numbers.</p>	<p>This involves the cost neutral recommendation of ceasing to seek information on the questions on employment and income – which currently have poor completion rates.</p>

	<p>Since its inception in spring 2003, VisitBritain has indicated that it does see this survey as necessarily fitting with its remit. VB indicated at the July meeting that it would need to bid internally for funding. Thus fresh source of funding and/or budget transfers may need to be considered.</p> <p>N.B. There was no UK compendium SVVA publication in 2004, unlike in recent years.</p>
<p><u>Recommendation 7: (High)</u> Progress production of key data for development of Tourism Satellite Accounts for the UK and its countries/regions. (N.B. The executive summary inaccurately summarises the 3 specific recommendations, mentioning only the first verbatim!)</p>	<p>This is a strategic leadership and influencing role. As a minimum, the responsible person (head of a TSU) should seek to influence ONS and other sources to deliver to the needs of a TSA, taking particular advantage of any particular opportunities, such as Reviews.</p> <p>If funds can be found to support TSA work, the role would extend to commissioning additional data collection for delivery to be synchronised with plans for updates of TSA estimates.</p>
<p><u>Recommendation 8: (High)</u> Panel surveys should be developed to provide timely short-term indicators of trends for a range of relevant indicators.</p>	<p>Agree, but consider to be of medium priority.</p> <p>The TSU, or responsible body/bodies, must engage with the Prime Minister's instructions on the control of all statistical surveys of businesses.</p>
<p><u>Recommendation 9: (Medium)</u> Methods for producing local tourism statistics should be developed and</p>	<p>To be taken forward by a TSU. Some progress should be possible</p>

<p>piloted. These should include surveys based on the improved registers of accommodation and the use of additional questions in household surveys to cover types of tourism that could not be captured in the accommodation-based surveys.</p>	<p>even with modest staffing, though the level of engagement and extent of outputs advice might be less.</p>
<p><u>Recommendation 10: (Medium)</u> Arrangements should be established for tourism interests to influence the development of employment and related statistics; also the exploitation of employment and economic statistical data for the production of tourism statistics should be increased.</p>	<p>As per comment on Rec 9.</p>
<p><u>Recommendation 11: (High)</u> The dissemination of tourism statistics, and information about the basis and quality of those statistics, should be improved. The same applies for other statistics of value to tourism. This should include the development of a high quality one-stop web-site and the development of release practices for statistics taking account of NS standards.</p>	<p>The Review calls for “ready and timely access” and to “ensure a better understanding of what is available and when.”</p> <ul style="list-style-type: none"> -Current dissemination varies widely in completeness and quality between and within organisations. - National Statistics standards should become the norm. - Improvements should be made to the structuring, navigation and orientation of STAR-UK site. Standard templates to prompt complete information should may play a part. - Substantial progress should be possible by instigating new systems and standards, even at modest cost.
<p><u>Recommendation 12: (Low)</u> Various steps should be taken to improve the quality of statistics of Business Tourism.</p>	<p>Agree with finding and priority. TSU should take this forward.</p>

<p><u>Recommendation 13: (Medium)</u> The review also makes a number of other, relatively minor, recommendations; these are listed in chapter 8.</p>	<p>As per comment on Rec 12</p>
<p><u>Recommendation 14: (High)</u> An effective organisation should be established and resourced to develop and maintain tourism statistics of appropriate quality. There is a fundamental need for such an organisation. This would most effectively take the form of a Tourism Statistics Unit, specifically accountable for the delivery of tourism statistics for the tourism community as a whole.</p> <p>It would probably be most appropriately located in ONS. Without some such clear allocation of relevant responsibilities, and the provision of appropriate resources, it is unlikely that adequate tourism statistics will ever be developed.</p> <p>As an immediate interim measure, it is recommended that resources should be sought to allow immediate progress, without awaiting the completion of the Action Plan, on a number of the relatively inexpensive and short term improvements recommended in this review. This could involve the appointment of a statistician in DCMS, (pending the establishment of a TSU); or a one year contract with a suitably experienced private sector statistician.</p>	<p>Agree that a TSU should be created to take strategic responsibility for all tourism statistics on behalf of the tourism statistics user community.</p> <p>Accept that the Tourism Statistics system has suffered from i) diffusion of responsibility, and ii) responsible organisations having competing pressing priorities.</p> <p>Agree that a TSU needs dedicated resources, a clear remit, sufficient authority, and accountability measures.</p> <p>It was not possible to appoint a statistician immediately. These actions should be picked up in the early days of a TSU.</p> <p>The Implementation Planning Group does recommend however that a detailed proposal answering to all 66 recommendations is produced – in the context of work plans – and that this is reviewed to the specification of the Advisory Committee, and that conclusions are published by the end of 2006.</p>