

First meeting of the Implementation Planning Group of the Review of Tourism Statistics: 21 July 2004 2pm – 4pm

Present: Sean Coster – Chair, DCMS
Gavin Sayer – DCMS
Vicky Coates – DCMS
Simon Brown – DCMS
Vicky Hill – DCMS

Lesley King – North West Development Agency
Neil Aulton – VisitBritain
Brian Hay – VisitScotland
Robert Lewis – Wales Tourist Board
Pamela Wilson – Northern Ireland Tourist Board
Andy Milne - Wales Assembly
James Gillan – Dept of Enterprise, Trade and Investment, NI
David Savage – Office for National Statistics
Nikki Bennett – Office for National Statistics
Alon Carmel – Greater London Authority
Elizabeth Pratt – London Development Agency
John Brown – Scottish Executive
Alan Searle – South East of England Development Agency

Apologies: Harry Reeves - DCMS
Gerhard Mors – Scottish Executive
Rob Edwards – Yorkshire Tourist Board
Liz Craven – South East England Tourist Board

Item 1 & 3 – Welcome and Introductions and Tourism Reform Implementation Group (TRIG)

Introduction

1. Sean Coster opened the meeting by providing an update on the data project and highlighted that it was a key area of the recently published prospectus, *Tomorrow's Tourism Today*. SC explained that following the *Review of Tourism Statistics* report DCMS were now required to provide a detailed action plan. He advised that the implementation plan depended on funding resources and DCMS was not fully aware of implications for Tourism following the Spending Review 04. More detail is expected in September and DCMS should have a clearer picture by the next meeting of what funding might be available.

TRIG

2. SC advised that, following the recent publication of *Tomorrow's Tourism Today*; the new Tourism Reform Implementation Group (TRIG) would have a more general overseeing role. SC explained that the TRIG meetings would not affect the Tourism Statistics Implementation Planning Group meetings and the discussions and draft plan would simply be fed into these meetings.

Item 2 – Implementation planning – introduction & contexts

3. Gavin Sayer explained that the meeting's main objective was to obtain views on the priorities of the recommendations in the report. He advised that we were not looking at ways to resolve the issues of delivery in the first meeting but to

inform a reasonable order in which to tackle the recommendations and to produce an implementation plan.

The National Statistics Review has certain requirements and an implementation plan must be produced. This plan must be produced within 6 months. GS explained that this report was part of the National Statistics Quality Review programme under which outputs should be looked at every 5 years. One of the requirements is to provide comments against recommendations.

Action: To drive forward subsequent meetings, GS will propose comments against each recommendation in a grid. Other conclusions and issues, such as roles to be taken will also be recorded in supporting documentation.

Item 4 – Matters arising

4. Neil Aulton stressed the importance of the UKTS. He explained the National Tourist Boards view and position. He advised that the contracts were due for renewal at the end of 2004 and CEOs of the National Tourist Boards believed that it was inappropriate to extend the contracts with the existing contractor, Millwood Brown. Brian Hay advised that Tourist Boards were reluctant to commit funding resources until there was clarification on how plans would be taken forward and data improved.
5. GS explained that monthly, quarterly and annual data all have to be produced under the EC Directive, and that it was not an option not to produce the data. He explained that data could be estimates, but must be credible figures, therefore the group must look for a solution to the issue. John Brown noted that there was the option of taking the funding back into central Government.
6. GS noted that the UKTS steering group had always had in mind that April was the latest time for the tendering process to be started for such a survey to be in place for the following January. JB stressed that it is important to take a view as soon as possible as time is short. NA stressed that it was important to identify clear ownership of the UKTS and funding. GS asked if it would be possible to send an instruction to National Tourist Boards from DCMS and Scottish Executive, asking them to carry on for another year despite the concerns and faults with the UKTS. Nikki Bennett noted that a possible merger with the Continuous Population Survey (CPS) would not be possible for some years. **ONS methodologists might also be asked for advise as to whether small improvements can be made to the survey in the meanwhile.** James Gillan suggested that the contract could be extended while addressing faults where possible. NB stated that cost implications are large for some of the key recommendations for improvement. Andy Milne suggested that it might be better to acknowledge the faults rather than continue with a bad survey that produces erratic data. SC reiterated that it was important not to anticipate that funding would be available. **Action: Devolved Administrations agreed to put the current position and options to their respective Ministers noting the requirements of the EC Directive, and therefore given timescales, the need to collect UKTS data in broadly similar form for another year.**

Item 5 – Update on plans for International Passenger Survey

7. David Savage provided an update on the International Passenger Survey (IPS). There have recently been two reviews with implications for the IPS: the migration review and the tourism review. ONS already started working towards the Migration Review recommendations, such as collecting more information from non-respondents.
8.
 - i) The tourism review recommended that the IPS collected data from additional airports and seaports. Those whose traffic volumes have grown in recent years are already in IPS plans, and as such, Prestwick and Liverpool should be included in 2005.
 - ii) DS advised that some investigation had taken place into introducing a regional element to the survey's weighting procedures. DS noted that the sample design was not designed to support the production of regional data. Furthermore, the survey's IT system is not robust; changes will not be made until a new system is in place (this is scheduled for the end of 2005).
 - iii) Accommodation questions are to be included more regularly in the survey. The potential for increasing the number and frequency of questions, is constrained by how many can be introduced in a 2-3 minute interview.
 - iv) DS advised that Denis Allnutt (Review consultant and author) had suggested that questions be harmonised to Tourism definitions, but other demands (Balance of Payments and Migration), along with the limited interview length mean this may not be possible.
 - v) There has been discussions of an 'expenditure trailer', to date commissioned every 5-6 years, but there is a cost to carry this out (circa £160k) which might be shared between tourism users and ONS National Accounts. TSA work would possibly encourage more trailers, and these should be synchronised.
9. DS noted that the IPS's overdue National Statistics Quality Review was currently indefinitely postponed. GS suggested that this Group's findings should include a recommendation that the postponed National Statistics Review of the IPS be carried out at the earliest opportunity, and this proposal was endorsed by all.

Item 6 – Current costs, management time and contractual commitments

10. GS asked the group to advise of any costs, management time or contractual commitments that could prevent the recommendations happening.
11. AM advised of Wales looking at hotels, restaurants and catering, which may involve asking hoteliers about their business i.e. profits and turnover.
12. Robert Lewis advised of the Wales Occupancy survey, whose 3 year contract is up for renewal in January 2005.
13. BH advised that the Scottish Occupancy survey contract expires in January 2006, and that VisitScotland was in discussions with the CAA about a new survey of airport passengers at Scottish airports, which will start in January 2005.
14. Elizabeth Pratt advised of LDA's forthcoming economic impact model tender, and this includes an occupancy survey.

15. The UK Occupancy Survey coordination contract expires on completion of work on 2004 data.

Action: GS advised that he would produce a grid illustrating the resources, management and responsibility.

Item 7 & 8 – Scope, process and prioritising outputs

16. GS advised the meeting of the feedback received from the National Statistician and invited comments on the diagram he had prepared setting out the groups' likely prioritisation of the areas recommended for improvement by the Review, (he added that DCMS would produce more detailed papers for the group to discuss at future meetings).

Day Visits and Leisure Day Visit Survey

17. JB agreed with the general prioritisation given in the diagram, adding that works on UKTS should be started first. He also felt information on staying domestic tourism (UKTS) and Day Visits (Leisure Day Visit Survey (LDVS)) needed to be separated. Day Visits are somewhat less high priority. NA stressed that the DV survey remained important to VisitBritain. VisitScotland and GLA representative colleagues felt that it is difficult to separate non-tourism from tourism day visits. GS questioned the finding in the review which placed emphasis on a continuous day visits survey. BH said that day visits lacks a clear lobby group and responsibility does not fall neatly to any public sector organisation(s) either.

Tourism Statistics Unit

18. Turning to the proposed Tourism Statistics Unit, NA said that VisitBritain felt that a full debate is needed about its location. This will be discussed at later meetings.

Accommodation Register

19. As for the Accommodation Register, John Brown felt that this should rank below the IPS, not least because it would be difficult to deliver. EP and others agreed, not least because of difficulties with the Fitness for Purpose pilot. BH added that the Register is not a survey, but more a database. GS noted that Denis Allnutt had recommended that this should be linked to existing sources such as Englandnet. Thus it is not an activity of duplication, but a strategic lead that a Tourism Statistics Unit would take forward. Thus it would be a tool to help other surveys rather than a survey itself. Some consider that the term "register" might mislead; perhaps since it could wrongly suggest an additional registration process by accommodation providers. He agreed to lower its priority rating a little on his chart.

SVVA

20. BH advised that Scotland was continuing with their Attractions Survey, which was designed to produce both national (Scottish) as well as regional Scottish data. NA added there were question marks over the level of industry co-operation on SVVA. NA and BH felt that better leadership role is needed if SVVA is to deliver. NA noted that the 2003 Visitor Attractions survey is due in mid August 2004. It is likely that VisitBritain will bid internally for funding for annual visitor attractions survey.

Action

21. It was agreed that GS would circulate a revised priority diagram. JB suggested that, even at this early stage, it would be useful to have a draft Action Plan produced. GS would circulate a first draft for comment before the next meeting, to again kick-start discussions.

Item 9 – Review of membership of Implementation Planning Group

22. GS asked for notification of other bodies which members felt could usefully be represented. DCMS needs to involve the Countryside Agency.

Item 10 – AOB

23. JB felt that the Group's timetable should take account of the British Irish Council's Summit in November, at which Tourism Satellite Accounting will be discussed. SC agreed that consideration could be given later to synchronising the Group's report and Action Plan with the Council's work.
24. SC concluded the meeting restating the agreement for Devolved Administrations to seek, as a priority, ministerial support to call for the continuation of the UKTS in 2005 (see item 4).

Item 11 – Time, date & location of next meeting

25. Next meeting will be in the first half of September, and the date and location will be circulated as soon as possible.