

Second meeting of the Review of Tourism Statistics Implementation Planning Group Minutes

14 September 2004, 2pm – 4pm

Present: Sean Coster – Chair, DCMS
Kevin Williamson - DCMS
Gavin Sayer – DCMS
Simon Brown – DCMS

Nicola Cronin – VisitBritain
Christine King – Heart of England Tourist Board
Lesley King – North West Development Agency
Brian Hay – VisitScotland
Robert Lewis – Wales Tourist Board
Pamela Wilson – Northern Ireland Tourist Board
David Savage – Office for National Statistics
Stephen Mills – South East of England Development Agency
Elizabeth Pratt – London Development Agency
John Brown – Scottish Executive
Tim Evans - National Assembly for Wales
Prabhat Vaze – Office for National Statistics

Apologies: Neil Aulton, VisitBritain,
James Gillan, DETI-NI

Item 1 – Welcome

1. Sean Coster (SC) opened the meeting by passing on the Minister's thanks to the Devolved Administrations and National Tourism Boards for action regarding the continuation of funding for the UK Tourism Survey in 2005.

Item 2 – Minutes of the first meeting on 21 July

2. The minutes of the first meeting on 21 July were approved.

Item 3 – Matter Arising

3. There were no new matters arising.

Item 4 – Updates

Government Spending Review

4. Kevin Williamson (KW) explained that the money awarded to DCMS in the Spending Review was mostly tied to specific initiatives. No decision has yet been made on available funding for tourism statistics; this will be pursued. SC commented that this means the current work of the Tourism Review Implementation Group (TRIG) is therefore on a contingent basis, but we should proceed positively nevertheless.

Measurement of Domestic Tourism

5. Brian Hay (BH) said that The National Tourist Boards were meeting at the end of this month to discuss a new contract for domestic tourism measurement. No additional budget is available.
6. John Brown (JB) commented that there was a serious discrepancy between tourism businesses reporting a 'record year' and the UKTS showing tourism volume and value still sliding. He noted that the Scottish Executive currently invests a total of £90 million each year in Scottish tourism, therefore being able to measure the outcomes from that investment is important. He saw two options in the short term:
 - a) Continue with the UKTS as is, in which case we can expect to see more falling figures, due to endemic UKTS issues such as people increasingly saying they have taken no trips to reduce the time of their telephone interview
 - b) Tweak the UKTS by, for example, reducing the recall period to one month and dropping the questions on activities (which might stop the overall survey cost increasing and help the response rate)

He also noted that the real issue is what to do from 2006. The Review's recommendation is to replace UKTS and the projected cost of the new survey is between £2-3 million. That could take a considerable time to work through along with all of the other parts of the Tourism Statistics Review; John thought that we needed to start soon on designing the specifications for the new UKTS and securing contributions from each partner. He suggested that as the UKTS is the top priority from the Review; it should be 'fast tracked'.

7. KW said that DCMS would need more detail and an exact cost for the new survey in order to make a funding bid.
8. Stephen Mills (SM) asked if the new UKTS survey would provide good quality regional and sub-regional figures as this was the level of most interest to the RDAs. Gavin Sayer (GS) said it would be better but not perfect, and a worthwhile improvement in its own right, and as an input to models and accounts.
9. BH said that good quality regional data would push the cost of the new survey towards £3million. He also commented that someone needs to take on the work for designing the specification for the survey.

10. Elizabeth Pratt (EP) commented that a recent RDA Chairs' paper had said that there would be no funding from the RDAs for 'national initiatives', a category into which tourism data collection might be considered.

Action: Elizabeth Pratt to send Gavin Sayer a copy of the RDA paper on funding of tourism statistics initiatives.

NOTE – EP has since established that this was a 'Position paper' that was for circulation among RDAs only. [10 Nov 04]

11. Sean asked if there was a consensus that the revision of the UKTS should be the top priority of the Review, higher for example than the development of a TSU. GS replied that the consultation of stakeholders in 2003 had identified the UKTS as high priority and results from the survey have worsened since. JB said while a TSU was important, there was "no contest" between that and getting better UK data, and that the UKTS must be fixed to provide credible data for Scotland. Rob Lewis said the UKTS was a very high priority for the WTB but he couldn't currently comment on available funding. Pamela Wilson agreed that the UKTS should be the priority, and said the TSU was of little interest to NITB. NITB are unlikely to be willing to provide more funding. They have their own issues, such as cross-border traffic, to resolve and are conducting their own review of NI statistics.
12. Sean concluded that there was a consensus in favour of making the UKTS the overriding priority. Other work, such as on developing a TSU, would have to be carried forward in that light.
13. BH and PW agreed that the timeliness of the UKTS was not as important to the National Tourist Boards (NTBs) as quality, detail and secondary analysis. Detail on accommodation sectors and activity holidays were examples of what would be useful. The new specification should focus on delivering secondary analysis and good dissemination.

Action: Gavin Sayer to arrange for a sub-group to be set up, with the assistance of National Tourist Boards, to develop a new specifications for the UKTS.

Ongoing Day Visits Survey (DVS) Work

14. The Countryside Agency is in the process of setting up a new DVS for England, which will be a telephone survey this time. It will be focussed on countryside trips – these make up a small proportion alongside town and other (seaside) trips. The consortium comprises: CA, DEFRA, the Environment Agency, and the Forestry Commission.
Scottish Natural Heritage is also proceeding with rural day visits measurement via their Scottish Recreation Survey. This survey will be conducted as part of a quota omnibus survey.

15. Simon Brown presented a paper on current, and possible future, compliance issues with the EU Directive. He identified a register of accommodation stocks, the future of the UKTS and the likely shortening of Eurostat deadlines for submission of data to be the major areas of concern. It was confirmed that the Directive will apply to the accession countries. BH pointed out that some data on outbound trips by accommodation type were available from the UKTS (the IPS does not cover this). GS commented that improving the accommodation register is a key issue for Eurostat compliance. He also noted that there will be open and free access to the data supplied by all members states to Eurostat.

Item 6 – Audit of relevant survey contractual commitments – Paper 2

16. Group member provided clarifications to complete this paper.

Item 7 – Tourism Statistics Unit – Paper 3

17. RL commented that the group had already placed this lower down the list of priorities than the UKTS. Lesley King noted that a TSU would need to hold a budget, as well as have staff, in order to be effective. SM said that from the England regions perspective, there was a big gap in terms of data coordination, and that the TSU would fill the coordination role that was once been provided by the BTA. It would only be useful if adequately resourced. If it consisted of just one person then it could only have an advisory role. BH suggested the advisory group might have a paid chair, probably an academic, and this could increase the influence of the group. BH asked if the TSU could function with the IPS outside of its control. David Savage said that, operationally, the IPS would stay where it is but that a TSU could take on an 'intelligent customer' role and control the financing for the IPS.

18. GS suggested that the group go through the questions contained in the paper.

- A properly resourced TSU would bring benefit
- The suggested TSU responsibilities were suitable. BH said there should be more emphasis on interpretation of results and only a limited role on media handling. PW agreed that the TSU could add value by interpreting trends and discrepancies while sub-UK queries would still be handled by NTBs.
- The suggested staffing level was appropriate
- The suggested membership of the advisory group was appropriate
- Questions on who would chair the advisory group, and the sanctions available to the group, were left open
- Questions on other accountability for the TSU were left open. BH commented that the Statistics Commission may be able to provide guidance.
- It was agreed that the location of the TSU was a secondary consideration after its responsibilities and resources
- BH commented that a secondment may be the best way to get the TSU started

The question over who would control survey funds was left open

Item 8 – Draft Implementation Plan – Paper 4

19. GS introduced the paper which included a draft 'response grid' by recommendation area.

Action: Group members to send Gavin any further comments on the draft responses to the recommendations by Friday 24 September

20. BH commented that the end of 2006 is a long delay before publication of the action plan. We could aim to produce an interim report by the end of 2005. SC said that the responses to each recommendation must reflect the group's earlier conclusion of the overriding importance to improve the UKTS.

21. Elizabeth Pratt queried the suggestion of RDA funding noted against recommendation 5. GS said that the UKOS currently over-delivers on the Eurostat requirement by producing regional data. The suggestion was that the RDAs might be approached for funds or the scale of the survey should be reduced to only provide national data. It was agreed that figures for serviced accommodation have the highest priority.

Item 9 – Any Other Business

22. GS said that the Tourism Satellite Account First Steps Project will be published on Thursday 16 September on the 'Research' section of the DCMS website. Employment estimates are not included, pending a review of methodology. The regional projects are proceeding well. BH informed the group that the Scotland TSA will be published in mid-October.

Item 10 – Time, date and location of next meeting

23. The date and location of the next meeting were left open but it was thought that late October might be suitable, depending on progress of the sub-group to scope the future shape of the UKTS, and on any other matters arising.