

## DEVELOPMENTS IN TOURISM STATISTICS IN SCOTLAND

### 1 **Introduction**

1.1 The purpose of this paper is to inform members of the Committee about recent developments in tourism statistics in Scotland.

1.2 If you require any further information about any of the points covered in this paper you are invited to contact:

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Or, if they prefer, members of the Committee are welcome to raise at the meeting any points which they feel are likely to be of interest to others.

### 2 **UK Tourism Survey (UKTS)**

2.1 The United Kingdom Tourism Survey (UKTS) is a national consumer survey measuring the volume and value of tourism trips taken by residents of the United Kingdom. It is jointly sponsored by VisitBritain, VisitScotland, Visit Wales and the Northern Ireland Tourist Board.

2.2 The survey covers trips away from home lasting one night or more taken by UK residents for the purpose of holidays, visits to friends and relatives, business and conferences or any other purpose. Tourism is measured in terms of volume (trips taken, nights away) and value (expenditure on trips).

2.3 The survey underwent a methodology change in May 2005, with the survey moving from a telephone survey to a face-to-face survey methodology. The change was brought about because of doubts in the reliability of the survey data being produced by the telephone survey methodology. TNS has been appointed to run the survey for the remainder of 2005 and for 2006-2010.

2.4 In 2005, there were just under 14.9 million overnight visits to Scotland by UK residents. UK visitors spent £3.0 billion.

2.5 Further information is available via *Tourism in Scotland 2005*, the annual Tourism in Scotland report which summarises tourist trends and attitudes for Scotland.

[http://www.scotexchange.net/research\\_and\\_statistics/essentials/tourism\\_in\\_scotland\\_2005.htm](http://www.scotexchange.net/research_and_statistics/essentials/tourism_in_scotland_2005.htm)

### 3 **International Passenger Survey (IPS)**

3.1 The International Passenger Survey (IPS) is a survey of a random sample of passengers entering and leaving the UK by air, sea or the Channel Tunnel. Over a quarter of million face-to-face interviews are carried out each year with passengers entering and leaving the UK through the main airports, seaports and the Channel Tunnel.

3.2 *Introduction of new airports into the International Passenger Survey sample:* Since 2001 there has been a considerable increase in traffic through airports in the UK. Consequently, Liverpool and Prestwick were introduced into the International Passenger Survey sample at the beginning of 2005. Between 2000 and 2004 traffic through Liverpool quadrupled to over two and half million international passengers. At Prestwick there was a fivefold increase to nearly one and half million passengers over the same period.

3.3 *Modification to IPS system of calculating weights for contacts at UK regional airports:* In order to ensure future IPS results are compatible with previously published information, the part of the IPS weighting system which deals with UK residual airports was modified. A discontinuity in regional results would otherwise occur due to the introduction of Prestwick and Liverpool airports into the IPS sample in January 2005. The change relates to the way traffic from airports not sampled by the IPS (about 5% of all international traffic to and from the UK) is accounted for.

3.3 *Reasons for Changes:* Examination of the provisional results for 2005 has shown a higher than expected rise in results for Scotland which was in part due to the introduction of Prestwick and Liverpool airports into the IPS sample from January 2005 and in part to the way traffic from un-sampled airports was accounted for. The IPS weighting processes were reviewed and a modified system for dealing with traffic from un-sampled airports developed which was approved by both the ONS methodology unit (which ensures changes in methodology are sound) and the IPS steering group (which represents all the major IPS clients and users). The new methodology prevents overestimates of traffic volumes to any particular UK region and additionally it prevents changes in traffic at remote locations in, for example, the south from affecting results in Scotland, and visa versa.

3.4 The revised figures for 2005, as well as the most recent quarterly information (for the period April to June 2006), are available via the following publication: [http://www.statistics.gov.uk/downloads/theme\\_transport/mq6-q2-2006.pdf](http://www.statistics.gov.uk/downloads/theme_transport/mq6-q2-2006.pdf). In 2005, there were just under 2.4 million overnight visits to Scotland by overseas residents. Overseas visitors spent £1.2 billion.

3.5 *Current developments:* Discussions are underway to introduce Rosyth as a new sampling point in the IPS with a view to start interviewing passengers at Rosyth in April 2007. This work will run for a pilot period of three years.

#### **4 Tourism sector of the economy**

4.1 The Office of the Chief Economic Adviser (OCEA), within the Scottish Executive, is developing a quarterly index of the economic impact of tourism as a sub series of the Gross Domestic Product (GDP) index. This covers overnight tourism only. It can be seen from the tourism index that tourism Gross Value Added (GVA) has in general been increasing in recent years – the average annual growth rate of the index since 1995 is 2.8 per cent, compared with 2 per cent in GVA overall (based on 2005 Q1 release of GDP).

4.2 Further details are available in *Scottish Economic Statistics 2005*. Chapter 3 on industry sectors provides information on various sectors of the economy – agriculture, fisheries, manufacturing, energy, construction, services and tourism which can be accessed via the following link: <http://www.scotland.gov.uk/resource/doc/76169/0019773.pdf>. *Scottish Economic Statistics 2006* is due to be published in late 2006.

## **5 Tourism Strategy**

5.1 *Scottish Tourism: The Next Decade - A Tourism Framework for Change* was published in March 2006. This is a Scottish tourism industry led framework mapping the direction of Scottish tourism for the next decade and is available via the following link: <http://www.scotland.gov.uk/Publications/2006/03/03145848/0>

5.2 The Executive shares the ambition of the tourism industry and VisitScotland to grow tourism revenue by 50% by 2015.

## **6 Forthcoming research project - Investigation of the Travel Behaviour of Visitors to Scotland**

6.1 The findings of a research project which was commissioned by the Scottish Executive (SE) on the travel behaviour of visitors to Scotland will be presented to the SE on 1 November 2006. The results of this study will contribute to our understanding of tourist travel within Scotland and could inform future developments of Scotland's transport policy with the aim of providing a transport system which is suitable for tourists' requirements. This will include providing better access to leisure and tourism facilities in Scotland whilst restricting the environmental impacts of tourist travel at the destination.

## **7 Tourism Bill**

7.1 The Stage 3 debate on the Tourist Boards (Scotland) Bill is to take place in Parliament on 25 October 2006. This would mean that VisitScotland can become fully integrated and operate as a single legal entity. Full details of the Bill are available via the following link: <http://www.scottish.parliament.uk/business/bills/60-touristBoards/b60s2-introd.pdf>

**October 2006**