

Will the Visitor economy feature in your Local Economic Assessment?

Note from the [English Tourism Intelligence Partnership](#):

You will probably be aware that all county and unitary authorities are expected to have a local economic assessment completed soon after April 2010. County assessments will need to be carried out in association with the relevant district authorities.

You may not know, though, that many authorities have already started to prepare their assessments.

The Local Government Association and the Improvement and Development Agency have supported the production of sector-led guidance to help councils through the assessment process. This can be downloaded from the IDEa website: www.idea.gov.uk/economicassessment

As the fifth largest industry in the UK, tourism is central to supporting employment, investment and skills development, particularly in the present economic downturn. The visitor economy is also an area of activity where the actions of a local authority, and its partners, can have a direct influence on the success of a place as a visitor destination. Councils are central to promoting and managing high quality places and destinations, providing information, maintaining attractions and key facilities and developing partnership working arrangements with local businesses.

This note will help to ensure that you have the information you need to ensure that the contribution of the visitor economy in your locality is captured within your Local Economic Assessment. This will be key to ensuring the value of tourism is appropriately referenced in future economic planning processes.

To achieve this, you may need to create greater awareness amongst colleagues of the role that the visitor economy plays nationally and locally, and you will need to build an economic evidence base for your locality.

Below is a check list (prepared by the Office for National Statistics) of the type of information that you might need to consider in doing this, and details of how you can collect it. In addition, the Local Authority membership organisation Destination Performance:UK www.dpuk.org.uk may also be able to offer assistance in this area.

Building the local evidence base for the economic impact and value of tourism can be an on-going piece of work. Economic Assessments will need to be updated annually, so there is always time to make the case.

Key Indicators	Source Information	Commentary
A. Core Variables		
A.1 Number of staying visitors (Domestic and InBound)	United Kingdom Tourism Survey (UKTS) (National Tourist Boards) International Passenger Survey (IPS) (ONS)	This information is available down to county or NUTS ¹ 2 level from the IPS and can be constructed at that level based on three year averages from the UKTS. At the local authority level some dis-aggregation would be necessary. There may be scope to include local visitor survey information to inform this particular variable.
A.2 Expenditure of staying visitors (Domestic and Inbound)	United Kingdom Tourism Survey (UKTS) (National Tourist Boards) International Passenger Survey (IPS) (ONS)	As with A.1, this information is available down to county or NUTS 2 level from the IPS and can be constructed at that level based on three year averages from the UKTS. At the local authority level some dis-aggregation would be necessary. There may be scope to include local visitor survey information to inform this particular variable.
A.3 Number of day visitors (Domestic and Inbound)	English Leisure Visits Survey (ELVS 2005) (Natural England) International Passenger Survey (IPS) (ONS)	It is difficult to produce estimates of this aspect of tourism from the national surveys down to the local authority level. The Department of Communities and Local Government may be able to offer some advice on the estimates that they produce in England. Inbound day visitor information is available at county level from IPS.

¹ Nomenclature of Territorial Units for Statistics

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<p>A.4 Expenditure of day visitors (Domestic and Inbound)</p>	<p>English Leisure Visits Survey (ELVS 2005) (Natural England)</p> <p>International Passenger Survey (IPS) (ONS)</p>	<p>It is difficult to produce estimates of this aspect of tourism from the national surveys down to the local authority level. The Department of Communities and Local Government may be able to offer some advice on the estimates that they produce in England. Inbound day visitor information is available at county level from IPS.</p>
<p>A.5 Occupancy levels serviced</p>	<p>UK Occupancy Survey (VisitEngland)</p>	<p>Locally occupancy data is essential for local economic impact modelling. Seasonality is an important issue that needs to be assessed. The England Occupancy Survey would not provide the local authority level of detail so local data collection exercises for occupancy may need to be called upon.</p>
<p>A.6 Occupancy levels unserviced</p>	<p>No national source available but VisitEngland have undertaken a census of non-serviced accommodation which is available on their website.</p>	<p>As with all occupancy data it should be derived at the local/sub-regional level and feed into regional/national totals.</p>
<p>A.7 Number of bed spaces available in total and as a ratio of beds per head of residential population</p>	<p>UK Occupancy Survey (VisitEngland)</p>	<p>Potentially an important indicator – derived from the occupancy data. A measure of vitality and the relative scale of the local tourism sector. The England Occupancy Survey would not provide the local authority level of detail so local data collection exercises for occupancy may need to</p>

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		be called upon.
A.8 Number of jobs in tourism (fte)	Labour Force Survey (LFS) (ONS) Annual Business Inquiry (ONS)	Local Authority level analysis of employment in the hospitality, leisure, travel and tourism industries has been carried out in a recent report from People 1 st (the Skills Sector Agency) called the State of the Nation Report 2009.
A.9 Visiting Friends and Relatives (VFR)	United Kingdom Tourism Survey (UKTS) (National Tourist Boards) International Passenger Survey (IPS) (ONS)	Forms part of the output from the UKTS and IPS and can be a useful further indicator for use in local economic impact assessment
A.10 Business Tourism	United Kingdom Tourism Survey (UKTS) (National Tourist Boards) International Passenger Survey (IPS) (ONS) English Leisure Visits Survey (ELVS 2005) (Natural England)	Useful to distinguish between business and leisure trips in the national surveys of inbound and domestic tourism.
A.11 Number of visitors at attractions	Annual Visitor Attraction Survey (National Tourist Boards)	At the sub-regional and local levels the crucial elements are turnover and spend and this data has particular utility in feeding into local economic impact modelling approaches. VisitEngland produces regional reports from the annual survey.
A.12 Gross Value Added (GVA) of the Tourism Industries and Tourism direct GVA	Annual Business Inquiry (ABI) (ONS)	The Tourism Intelligence Unit at ONS is currently working on producing figures on the GVA of tourism at the regional and sub-regional level. Estimates of tourism GVA

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		<p>at the regional level can be derived from the ONS Annual Business Inquiry data using the following Standard Industrial Classification</p> <ul style="list-style-type: none"> SIC 551 Hotels SIC 552 Short stay accom SIC 553 Restaurants SIC 554 Bars SIC 633 Travel agencies etc SIC 925 Libraries, archives, museums etc. SIC 926 Sporting activities SIC 927 Other recreational activities
<p>A.13 Independent Local Economic Impact of Tourism Studies</p>	<p>A number of providers of Economic Impact models exist in the sector and the results derived from these may feed into the Local Economic Assessment.</p>	<p>Economic impact models provide:</p> <ul style="list-style-type: none"> • estimates of the volume and value of tourism activity including day visitors within an area • estimates of income generated and employment supported by visitor expenditure. <p>To produce these estimates, impact models identify three main effects.</p> <ul style="list-style-type: none"> • Direct effect – from visitor spending in first-line businesses. • Indirect effect – from direct businesses buying from their suppliers and so on down the supply chain. • Induced effect – from the wages earned in businesses in direct and indirect receipt of visitor spending.

Useful Websites

<http://www.enjoyengland.com/corporate/corporate-information/VisitEngland-Research-Insights.aspx> VisitEngland Research and Insights Pages

<http://www.visitbritain.org/insightsandstatistics/index.aspx> VisitBritain Insights and Statistics Pages

<http://www.statistics.gov.uk/hub/people-places/people/tourism/index.html>
Office for National Statistics / National Statistics Authority Publication Hub (Tourism Pages)

<http://www.people1st.co.uk/research> People 1st research pages.

<http://www.dpuk.org.uk/index.php> Destination Performance UK website

<http://www.alva.org.uk/> Association of Leading Visitor Attractions

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