

# Wales Regional TSA 2013

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## Wales TSA 2013

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TSA-TABLE 5: Production accounts of tourism industries and other industries (at basic prices) in Wales (£ millions), 2013	Tourism Industry																	
	Accommodation for visitors	Regional	Non Regional	Food and beverage serving industry	Regional	Non Regional	Railway passenger transport	Regional	Non Regional	Road passenger transport	Regional	Non Regional	Water passenger transport	Regional	Non Regional	Air passenger transport	Regional	Non Regional
Accommodation services for visitors	891	610	281	91	60	32	-	-	-	-	-	-	-	-	-	-	-	-
Food and beverage serving activities	345	75	270	2,739	1,791	949	4	0	4	2	1	1	1	0	1	1	0	1
Railway passenger transport services	-	-	-	-	-	-	454	12	442	-	-	-	-	-	-	-	-	-
Road passenger transport services	-	-	-	-	-	-	-	-	-	389	215	174	-	-	-	-	-	-
Water passenger transport services	-	-	-	-	-	-	-	-	-	-	-	139	7	132	-	-	-	
Air passenger transport services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	110	7	104
Transport equipment rental services	1	1	0	3	2	1	15	0	15	3	2	1	1	0	1	0	0	0
Travel agencies & other reservation services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cultural activities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sport and recreation activities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exhibitions & Conferences etc	1	0	0	8	5	3	0	0	0	1	0	0	0	0	0	0	0	0
Other consumption products	6	4	3	49	32	17	6	0	6	1	1	1	4	0	3	2	0	2
<b>TOTAL OUTPUT</b>	<b>1,322</b>	<b>767</b>	<b>555</b>	<b>2,891</b>	<b>1,890</b>	<b>1,001</b>	<b>480</b>	<b>13</b>	<b>467</b>	<b>396</b>	<b>219</b>	<b>177</b>	<b>144</b>	<b>7</b>	<b>137</b>	<b>114</b>	<b>7</b>	<b>107</b>
<b>TOTAL INTERMEDIATE CONSUMPTION (at purchasers prices)</b>	<b>734</b>	<b>426</b>	<b>308</b>	<b>1,710</b>	<b>1,118</b>	<b>592</b>	<b>270</b>	<b>7</b>	<b>263</b>	<b>169</b>	<b>93</b>	<b>75</b>	<b>81</b>	<b>4</b>	<b>77</b>	<b>71</b>	<b>4</b>	<b>66</b>
<b>TOTAL GROSS VALUE ADDED (at basic prices)</b>	<b>588</b>	<b>341</b>	<b>247</b>	<b>1,181</b>	<b>772</b>	<b>409</b>	<b>210</b>	<b>6</b>	<b>204</b>	<b>227</b>	<b>126</b>	<b>102</b>	<b>63</b>	<b>3</b>	<b>60</b>	<b>43</b>	<b>3</b>	<b>41</b>

TSA-TABLE 7 Extended: Employment in the tourism industries in Wales, 2013									
	FTE			GVA/FTE			Output/FTE		
	Total	Regional	Non Regional	Total	Regional	Non Regional	Total	Regional	Non Regional
<b>Tourism Characteristic Activities</b>									
Accommodation services for visitors	18,209	12,716	5,492	54,087	52,720	57,251	32,306	26,838	44,964
Food and beverage serving activities	41,830	28,261	13,569	75,648	66,872	93,927	28,231	27,317	30,132
Railway passenger transport services	1,375	125	1,250	330,636	98,694	353,780	152,847	45,625	163,546
Road passenger transport services	4,302	3,605	696	90,525	59,733	249,939	52,795	34,837	145,768
Water passenger transport services	791	612	178	175,493	11,016	740,133	79,783	5,008	336,479
Air passenger transport services	328	110	218	336,527	61,645	475,132	131,604	24,107	185,807
Transport equipment rental services	877	719	158	326,400	117,063	1,280,112	154,184	55,257	604,884
Travel agencies & other reservation services	2,327	1,578	749	64,386	52,736	88,921	185,487	151,937	256,146
Cultural activities	3,521	2,668	853	109,439	55,626	277,866	51,507	26,180	130,775
Sport and recreation activities	12,560	9,179	3,381	79,419	34,218	202,147	77,889	33,552	198,272
Exhibitions & Conferences etc	383	285	98	434,214	66,232	1,511,725	196,588	18,596	717,777
<b>Tourism Totals</b>	<b>86,500</b>	<b>59,858</b>	<b>26,642</b>	<b>94,624</b>	<b>66,173</b>	<b>158,548</b>	<b>47,563</b>	<b>31,957</b>	<b>82,627</b>

TSA-Table 11 Tourism Social Accounting Matrix, 2013																						
Products	Accommodation for visitors			Food and beverage serving			Railway passenger transport			Road passenger transport			Water passenger transport			Air passenger transport			Transport equipment rental			
	Total	Wales	Regional	Non Regional	Total	Wales	Regional	Non Regional	Total	Wales	Regional	Non Regional	Total	Wales	Regional	Non Regional	Total	Wales	Regional	Non Regional		
Accommodation services for visitors	891	610	281	91	60	32	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Food and beverage serving activities	345	75	270	2739	1791	949	4	0	4	2	1	1	0	0	0	0	1	0	1	0	0	
Railway passenger transport services	0	0	0	0	0	0	454	12	442	0	0	0	0	0	0	0	0	0	0	0	0	
Road passenger transport services	0	0	0	0	0	0	0	0	0	389	215	174	0	0	0	0	0	0	0	0	0	
Water passenger transport services	0	0	0	0	0	0	0	0	0	0	0	0	139	7	132	0	0	0	0	0	0	
Air passenger transport services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	110	7	104	0	0	0	
Transport equipment rental services	1	1	0	3	2	1	15	0	15	3	2	1	1	0	1	0	0	0	0	238	70	168
Travel agencies & other reservation services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cultural activities	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sport and recreation activities	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Exhibitions & Conferences etc	1	0	0	8	5	3	0	0	0	1	0	0	0	0	0	0	0	0	0	2	0	1
Other consumption products	6	4	3	49	32	17	6	0	6	45	1	1	1	4	0	3	2	0	2	5	2	4
<b>TOTAL OUTPUT</b>	<b>1322</b>	<b>767</b>	<b>555</b>	<b>2891</b>	<b>1890</b>	<b>1001</b>	<b>480</b>	<b>13</b>	<b>467</b>	<b>396</b>	<b>219</b>	<b>177</b>	<b>144</b>	<b>7</b>	<b>137</b>	<b>114</b>	<b>7</b>	<b>107</b>	<b>245</b>	<b>72</b>	<b>173</b>	
<b>Financial Account (Emillion)</b>																						
TOTAL INTERMEDIATE CONSUMPTION(at p	734	426	308	1710	1118	592	270	7	263	169	93	75	81	4	77	71	4	66	110	32	78	
TOTAL GROSS VALUE ADDED(at basic price	588	341	247	1181	772	409	210	6	204	127	126	102	63	3	60	43	3	41	135	40	95	
Taxes less subsidies on production	138	80	56	387	253	134	-125	-4	-121	-125	-69	-56	-6	0	-5	-2	0	-2	25	7	18	
Mixed & self-employed income	34	20	14	63	41	22	1	0	1	196	109	86	4	0	4	0	0	0	1	0	1	
Compensation of Employees	303	176	123	682	446	236	49	1	48	95	53	43	24	1	23	13	1	12	22	7	15	
Other Value Added	113	66	53	49	32	17	285	8	277	61	33	27	41	2	39	32	2	30	87	25	62	
Value Added per FTE	0.0323	0.0268	0.0450	0.0282	0.0273	0.0301	0.1528	0.0456	0.1635	0.0528	0.0348	0.1458	0.0798	0.0050	0.0371	0.1316	0.0241	0.1859	0.1542	0.0552	0.6040	
Taxes less subsidies per £1m output	0.1047	0.1047	0.1015	0.1338	0.1338	0.1339	-0.2604	-0.2747	-0.2600	-0.3157	-0.3168	-0.3173	-0.0391	-0.0383	-0.0391	-0.0175	-0.0199	-0.0178	0.1023	0.1032	0.1020	
Value Added per £1m output	0.4450	0.4450	0.4450	0.4085	0.4085	0.4085	0.4377	0.4377	0.4377	0.5735	0.5735	0.5735	0.4380	0.4380	0.4380	0.3786	0.3786	0.3786	0.5516	0.5516	0.5516	
<b>Purchasing Account</b>																						
Domestic resident industries	497	336	160	1191	883	308	142.3	5.8	136.5	113.0	73.8	39.3	43.1	3.1	40.0	38.0	3.4	34.6	66	26	40	
Foreign resident industries	237	89	148	519	235	284	104.2	0.9	103.3	45.7	14.0	31.7	-12.0	-1.6	-10.4	-328.3	-21.3	-307.0	44.0	6.8	37.2	
Imports	-	-	-	-	-	-	23.4	0.6	22.8	10.1	5.6	4.5	49.8	2.4	47.4	361.1	22.2	338.9	-	-	-	
Total Intermediate Purchases	734	426	308	1710	1118	592	270	7	263	169	93	75	81	4	77	71	4	66	110	32	78	
<b>Employment Account</b>																						
Full-Time	12038	8407	3631	19369	13086	6283	1356	123	1233	3588	3007	580	664	514	149	303	102	201	630	393	236	
Part-Time	12341	8618	3722	44922	30350	14572	37	3	34	1427	1196	231	253	196	57	50	17	33	493	307	185	
Country of birth (Wales)	10576	7386	3190	24296	16415	7882	943	86	857	2950	2472	478	542	420	122	225	75	149	601	493	108	
Country of birth (UK)	5735	4005	1730	13175	8901	4274	344	31	313	1077	903	174	198	153	45	82	28	55	219	180	40	
Country of birth (Rest of World)	1897	1325	572	4358	2945	1414	88	8	80	275	230	44	50	39	11	21	7	14	56	46	10	
Total FTE	18209	12716	5492	41830	28261	13569	1375	125	1250	4302	3605	696	791	612	178	328	110	218	877	719	158	
Compensation per FTE (Emillion)	0.0166	0.0138	0.0224	0.0163	0.0158	0.0174	0.0356	0.0112	0.0381	0.0221	0.0146	0.0613	0.0304	0.0019	0.1284	0.0396	0.0082	0.0569	0.0251	0.0091	0.0980	
<b>Skills &amp; Qualifications Account</b>																						
Degree or equivalent	2235			5125			92			288			53			22			59			
Higher education	1249			2864			88			274			50			21			56			
GCE, A-level or equivalent	4931			11305			304			951			175			73			194			
GCSE grades A*-C or equivalent	5632			12913			417			1304			240			99			266			
Other qualifications	2301			5276			230			908			167			69			185			
No qualification	1622			3718			157			490			90			37			100			
Did not know	263			603			23			72			13			5			15			
Total FTE	18209			41830			1375			4302			791			328			877			
<b>Household Income Account</b>																						
Claiming (other) State Benefits	17460			44996			1031			10141			757			264			841			
Not claiming (other) State Benefits	8995			23180			382			3751			280			97			311			
Total Employment	26455			68176			1413			13892			1037			361			1152			

# Key Results

Comparison of the output percentages, GVA/FTE, GVA, TGVA between regionally owned and non-regionally owned tourism businesses in Wales at 2013

Products	Output Percentage		GVA/FTE (£/FTE)			GVA (Emillion)			Tourism Ratio	TGVA (Emillion)		
	Regional (%)	Non Regional (%)	Regional	Non Regional	Productivity Difference	Total Wales	Regional	Non Regional		Total Wales	Regional	Non Regional
Accommodation services for visitors	58%	42%	26,838	44,964	1.675	588	341	247	70.8%	416	242	175
Food and beverage serving activities	65%	35%	27,317	30,132	1.103	1,181	772	409	29.3%	346	226	120
Railway passenger transport services	3%	97%	45,625	163,546	3.585	210	6	204	54.2%	114	3	111
Road passenger transport services	55%	45%	34,837	145,768	4.184	227	126	102	22.1%	50	28	22
Water passenger transport services	5%	95%	5,008	336,479	67.188	63	3	60	12.9%	8	0	8
Air passenger transport services	6%	94%	24,107	185,807	7.708	43	3	41	7.1%	3	0	3
Transport equipment rental services	29%	71%	55,257	604,884	10.947	135	40	95	3.5%	5	1	3
Travel agencies & other reservation services	56%	44%	151,937	256,146	1.686	432	240	192	25.2%	109	61	48
Cultural activities	39%	61%	26,180	130,775	4.995	181	70	111	29.9%	54	21	33
Sport and recreation activities	31%	69%	33,552	198,272	5.909	978	308	670	11.0%	108	34	74
Exhibitions & Conferences etc	7%	93%	18,596	717,777	38.599	75	5	70	1.8%	1	0	1
Other consumption products	47%	53%				61,143	28,428	32,715	1.6%	985	458	527
<b>Total Output</b>	<b>47%</b>	<b>53%</b>	<b>506,876</b>	<b>1,310,585</b>	<b>2.586</b>	<b>65,257</b>	<b>30,341</b>	<b>34,916</b>	<b>3%</b>	<b>2,200</b>	<b>1,074</b>	<b>1,126</b>
<b>TGVA/Wales GVA</b>										<b>3.4%</b>	<b>3.5%</b>	<b>3.2%</b>

## Key Results

- Wales TSA 2013 shows that the non-regional tourism businesses contribute more than half of the tourism GVA and output overall.
- Non-regional tourism businesses also have a much higher productivity across all tourism-related industries if GVA/FTE as the indicator and a higher leakage level.
- In Wales, tourism industries employ people who has obtained less number of years of education, e.g., overall, 26.2% of the FTEs in Wales are educated to degree or equivalent level, whereas, only 16.35% of the FTEs in tourism industries have obtained education at degree or equivalent level.
- Immigrant workers employed are 40% in tourism industries and 33.3% overall.
- 67.1% of the FTEs in the tourism industries are from a lower income group (claiming state benefits) and 31.6% of the FTEs overall in Wales are from the lower household income group (claiming state benefits).

## TSA in Wales: Current/Upcoming Developments

- Part of project with water supply company and a National Park to understand the varied benefits of a water 'mega-catchment' – estimating the value of water-based tourism to compare with household, business & climate benefits



- Feasibility study (inc. funded PhD) to develop an Input-Output Table and Satellite Accounts for Cardiff City Region to audit economic impact
- Please contact Calvin – [jonesc24@cf.ac.uk](mailto:jonesc24@cf.ac.uk) for more info.

