

All Island Tourism Statistics Liaison Group Meeting

Wednesday 20th June 2018

10.30am – 1.15pm

**Failte Ireland, 88 - 95 Amiens Street,
Dublin 1**

Chairperson: Jim McColgan, NISRA

Agenda:

10.30 - 10.40: Introduction, Welcome, Agenda & Minutes of 2017 Meeting

10.40 - 11.00: Update from NISRA

11.00 - 11.20: Update from CSO

11.20 - 11.30: Tea/Coffee Break

11.30 - 11.50: Overseas holidaymakers' perceptions of value for money

11.50 - 12.15: Northern Ireland key market data issues

12.15 - 12.30: Update on day trips

12.30 - 12.45: Any other business

12.45 - 13.15: Lunch

Minutes

Chairperson: Jim McColgan (NISRA)

Attendees : Jim McColgan (NISRA), Stephen Dunne (NISRA), Sarah McAuley (NISRA), Joe Treacy (CSO), Paul J Crowley (CSO), Donal Kelly (CSO), Mairead Griffin (CSO), Patsy King (CSO), Caeman Wall (Failte Ireland), Bernie Morris (Failte Ireland), Neil Aulton (Tourism Ireland), Olivia Mulhern (Tourism Ireland), Maria Melia (The Department of Transport, Tourism and Sport (DTTAS)), Sinead Singleton (The Department of Transport, Tourism and Sport (DTTAS)), Dot Erskine (Tourism Northern Ireland), Anne-Marie Montgomery (Tourism Northern Ireland), Angela Jackson (Department for the Economy, Northern Ireland).

1. Welcome and introduction

The chairperson welcomed members of the Liaison Group to the meeting, particularly those who were attending their first meeting. Apologies were recorded from Eoghan O'Mara Walsh (ITIC). The minutes of the June 2017 meeting (already published) were agreed.

2. Update from NISRA (Stephen Dunne)

Stephen told the group that the NISRA Tourism Statistics team published their annual 2017 results on 7th June 2018. He highlighted that the estimates showed that trips and spend continued on their upward trend and that the estimated number of overnight trips to Northern Ireland by external visitors was the highest estimate on record.

Hotel occupancy was up again and there are dramatic changes ongoing in terms of stock with about 1,000 extra rooms this year and about 3,500 additional rooms in total in the pipeline. The group discussed options for presenting this data and Caeman Wall explained Failte Ireland's approach. Stephen also mentioned the increase in cruise ships docking in NI ports.

Stephen gave updates on methodology changes to Northern Ireland Passenger Survey and Continuous Household Survey update which included the Blaise 5 update for CAPI, which made the survey easier to administer for interviewers.

Future developments for NISRA Tourism Statistics includes user engagement work, the publication of experimental domestic day trip statistics in August, information on NI residents going abroad, Urban/Rural analysis and key market analysis. Other work includes a review of domestic tourism methodology and confidence interval methodology.

3. Update from CSO (Patsy King and Joe Treacy)

Patsy King gave an update on CSO Tourism releases - Tourism and Travel release for Q1 2018 was published on 13th June, Overseas Travel Release for the period March- May 2018 is to be published on 27th June. CSO are now publishing monthly data from January 2018 onwards together with seasonally adjusted monthly data. The Household Travel Survey (HTS) Quarter 1 release will be published on 4th July.

CSO started collecting data on Same Day Visits (SDVs) from January 2018 onwards and this is discussed in more detail later in the agenda. In relation to overseas travel, Patsy told the group that monthly data was published in the January 2018 release and included monthly figures from January 2016. In the past a three month rolling series had been published. The seasonally adjusted and unadjusted monthly data being published includes information on all trips, Irish residents' trips overseas and trips to Ireland broken down by the GB, Other Europe, USA/Canada and Other areas.

Joe Treacy updated the group on progress on the Tourism Transformation Project which aims to replace Passenger Card Inquiry (PCI) paper collection with a mobile app (CAPI). The project aims to meet new data requirements in terms of frequency and detail and to allow flexibility of response to changing data needs. Although the implementation is taking longer than expected, and Joe thanked all for their patience, the development of the mobile app for interviewers has been completed and is stable and is ready for field testing together with a new questionnaire in Dublin airport. However, because the development has taken so long, CSO have instigated a review before they embark on the next steps in the project. The review will set out a plan for immediate and longer term actions. CSO feel that other opportunities now exist and user needs may have changed since the original planning.

The team will make recommendations on the way forward to the management board when it meets in September 2018. Joe assured the group that this will not stop ongoing work which includes considering various sample design and grossing methodologies and looking at other data sources for calibration. The financial implications in relation to staff being employed running the old and new methodologies and agreeing a timetable also needs to be considered. At this point, Joe cannot confirm a go-live date or confirm the period of parallel running but will provide clarity on these following the management board meeting.

NISRA said that they understood that things had moved on since the start of the transformation project and understood the changed logistics at Dublin airport, but they were still concerned at the delay. The Tourism Transformation Project was anticipated to provide significant improvements to the information available on passengers travelling through ports in ROI and has awaited the implementation for a few years now. Unfortunately, key customers were disappointed by further delays and the unavailability of the improved data. NISRA felt that a sufficient sample sizes for interviews was important if robust data was to be made available for NI when the CAPI system goes live. NISRA's hope was that the interviews should commence in January 2019.

TI said they were concerned about further delays on the implementation. They highlighted that 2019 was the beginning of their new business planning cycle and it was very important that the new system began operating in January 2019 to facilitate robust measurement of tourism targets. CSO confirmed that they should be able to give an indication of the timetable after the September Management Board meeting, but that work was continuing in

development during the review period, this would mean that a January 2019 commencement was still possible.

TI also asked for confirmation that the new system be better from a NI perspective. CSO said that the ability to clarify answers with an interviewee at the point of interview would produce much better information than was available from the passenger card inquiry. The sample size is unknown at this stage but will be more robust in terms of people travelling to NI. The addition of questions on expenditure, reason for visit and supplementary questions on business trips will produce additional useful information. NISRA highlighted to CSO that sample sizes are important from their perspective to enable lower levels of disaggregation such as analysis of key markets. TNI and DFE both said this was important information from their perspective, with TNI also saying that data on emerging markets was a big gap in the information available to them.

NISRA and TI both asked that a period of dual running with the previous system would be important to compare results and 12 months would be a suitable period. CSO could not confirm the duration of a dual running cycle before September, but it was unlikely there would be no dual running period.

The chair thanked Joe for this update and wished CSO luck with this work and said that all were looking forward to the availability of the new data.

4. Overseas holidaymakers' perceptions of value for money (Caeman Wall: Failte Ireland)

Caeman Wall gave a presentation on overseas holidaymakers' perceptions of value for money. This was the results of a face to face survey of about 2,600 holidaymakers exiting through Irish ports during peak season.

Results indicate that the key factors influencing holidaymakers' satisfaction levels remain high with no tail off in recent years. However, results indicate a drop in expectations exceeded with Value for Money down. Whilst holidaying in Ireland was never cheap, it was considered to be delivering good Value for Money.

Caeman's presentation indicates that in the past cheap flights and favourable exchange rates for visitors had helped attract visitors but this had now changed with the euro gaining strength against Sterling and the Dollar. However exchange rates could not explain everything, as there was a tail off in the French and German markets which are also in the euro zone. Indications are that general costs on food, eating-out and accommodation are all having an impact. There has been a significant increase in average room rates which is a fair indication of the overall trend in accommodation pricing with the average hotel rate in Ireland being 44% higher than four years ago.

5. Northern Ireland key markets data issues (NISRA/Group)

NISRA outlined the background to this item. The Department for the Economy in NI had signed off on the TI Business Plan on the basis that a meeting would take place to explore options in relation to producing statistical data to assist in the setting and measuring of targets in relation to key tourism markets (GB, USA, France and Germany). The meeting of the key stakeholders took place at the end of April and one of the outcomes was the recognition that

there was a lack of robust data that could be used to measure performance in relation to visitor numbers and spend in relation to visitors from these key markets. It was agreed that the key issue was the small sample sizes for visitors to NI from France and Germany being interviewed in the Survey of Overseas Travelers (SOT).

DfE indicated that it was a major issue that they can't measure performance in these key markets. They asked what information is available in the absence of the CAPI data. NISRA asked what additional information is available from the current PCI that would allow us to investigate these markets in the interim.

CSO said they were keen to ensure data they provided was robust and urged some caution given that ONS had queried the PCI data during a review in 2014.

Given the delay in implementing the Tourism Transformation Project being implemented, TI felt that it would be useful to reassess current data now. NISRA said it currently produces the National Statistics using the SOT as this was the most reliable information available for headline NI figures. However, NISRA will investigate using the PCI data to supplement these to provide indicative figures of key market analysis for DfE targets.

It was agreed that CSO will investigate what is available from PCI relation to the key markets and discuss with NISRA over the coming weeks.

5. Update on day trips (NISRA/CSO)

NISRA will release experimental statistics on domestic day trips ("same day visits") in August 2018, covering 2016 and 2017. They highlighted that the definition of a day trip is open to interpretation, with slight differences in methodologies between countries. NISRA will use clear definitions of what is being reported, based on Eurostat definitions. The inclusion or exclusion of travel times in the trip duration is a key issue, with Eurostat recommending that it is excluded. NISRA has updated its questionnaire so that this can be included or excluded from the analysis in future.

CSO started collecting data on Same Day Visits (SDVs) from January 2018 onwards. This was done via extra questions on the Household Travel Survey (HTS) form. Limited space was available on the questionnaire so questions were kept as simple as possible, taking on board Eurostat guidance. Collection and processing is going well and first results should be out towards end of 2018.

Patsy was able to confirm that trips by ROI residents to NI should be available including destination visited and spend. Stephen confirmed the same information would be available relating to NI residents taking day trips to ROI.

The fact that Eurostat produced guidance and not precise definitions was discussed. Standardisation across countries was needed as some issues were still being left to the interpretation of individual countries.

8. Any other business

DTTAS raised the issue of Tourism Satellite Accounts (TSAs) which were now a priority following the Value for Money review and the next Action Plan which was upcoming. The

CSO will appoint a graduate to undertake research work on the potential for developing a TSA for Ireland. The work will commence in September and run until the middle of next year. It is envisaged that the graduate will develop and document our knowledge on the compilation of a Tourism Satellite Account, seek to identify data gaps and potential data sources and where possible, compile some of the indicators. The outcome of the exercise will be a report which will outline Ireland's ability to meet the TSA indicators and make recommendations on the way forward.

TI & TNI thanked CSO and NISRA for the data which provided them with useful information.

9. Date of next meeting

Jim McColgan thanked everyone for attending the All Ireland Tourism Liaison Group meeting, especially those who had attended for the first time and those who had made presentations. Jim paid particular thanks to Paul J Crowley who was attending his last Liaison Group meeting and who had over the years played a pivotal role in the success of the group. His presence, approachability and breadth of knowledge would be greatly missed by the group. Jim also thanked Failte Ireland for hosting the meeting. The next meeting will be held in Dublin in June 2018 and will be organised by CSO.

Presentations