**Minutes**

**Tourism Statistics Branch – User Group Meeting**

28 October 2016 10:00 a.m. – 13:00 p.m.

**NISRA (Northern Ireland Statistics and Research Agency)**

Boardroom, McAuley House, 2-14 Castle Street, Belfast, BT1 1SA.

**Chairperson:** Joanne Henderson

**Attendees :** Joanne Henderson (NISRA), Kevin Sweeney (NISRA), Sarah McAuley (NISRA), Patrick O’Kane (NISRA), Ian Stanley (NISRA), Charlene Hesketh (NISRA), Mark Mullan (NISRA), Anne-Marie Montgomery (Tourism Northern Ireland), Pamela Wilson (Tourism Northern Ireland), Dawn Sellar (Tourism Northern Ireland), Beverley Warnock (DfE), Barbara Baker (DfE), Fiona Liversidge (Visit Belfast), Claire Shortt (NISRA Belfast City Council), Pier Morrow (Belfast City Council), Claire Hood (NISRA – Derry & Strabane City Council), Odhran Dunne (Visit Derry), Eddie McGovern (Fermanagh & Omagh District Council), Michael Browne (Mid Ulster District Council), Mary McKeown (Mid Ulster District Council), Sharon Mahaffy (Ards & North Down Borough Council), Karen Wilson (DfE), Emma McQuaid (Armagh City, Banbridge & Craigavon Borough Council).

**1.       Welcome and introduction**

The chairperson welcomed those in attendance to the User Group Meeting.

**2.       Presentation by Joanne Henderson (NISRA)**

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**Background**

NISRA informed those in attendance that a number of Tourism Statistics publications are currently undergoing National Statistics assessment, with the report to be published by the UK Statistics Authority in November. NISRA explained that there would be a number of requirements included in the report.

**Use of Tourism Statistics**

NISRA explained to the users some of the ways that NISRA are aware that Tourism Statistics are currently being used; and then asked for examples of how those in attendance use the statistics.

Belfast City Council said that they currently use the statistics to measure key performance indicators, to make sure that the return on tourism meets the investment put into tourism. The main statistics Belfast City Council use are the Local Government District (LGD) tourism statistics, however there are limitations which the department should address; the number of day visitors and Republic of Ireland day visitors. Belfast City Council believes that the statistics are robust; but there are limitations on Occupancy statistics due to response rate. However, overall NISRA are doing a good job and thinks all LGD’s would benefit from more information as they require robust statistics.

Department for the Economy use the statistics to feed into the Tourism Strategy and Programme for Government (PfG) targets. The minister is aware of any publication, and statistics feed into numerous Assembly Questions (AQ’s).

Tourism Northern Ireland use the statistics to measure the performance of the industry, both at NI and LGD levels, and at individual market levels. The statistics are also used to raise the profile of tourism, funding purposes and benchmarking against other destinations; when TNI go to benchmark accommodation occupancy statistics, NISRA are generally quicker than other regions.

Visit Derry concurred regarding the aforementioned uses of the statistics; and that the statistics are used to support information provided to hotel developers etc. Visit Derry also uses the NI annual tourism statistics and LGD statistics as they are seen as robust statistics; a third party could be used but questions if this would be seen in the same regard as those produced by NISRA. The concern is that currently there is only a focus on overnight visitors, which is not representative of the full tourism economy; providing the example of Derry~Londonderry being a border region with a vast cross-border day tripper economy.

Fermanagh & Omagh District Council informed that the statistics are becoming more widely used and relied on by decision makers. However, concerned that when broken down to LGD level, Fermanagh and Omagh for example, has a lot of variation year on year at the bottom line figures; especially expenditure. It was also asked if NISRA uses STR Global occupancy report, and if there is any cross over on the two sources? Visit Belfast explained that you have to buy into this survey; therefore it has a more commercial aspect to it, as well as a different sample frame.

Visit Belfast stated that the Hotel Occupancy is a good barometer, and that the only challenge they have is the time lag. Concern was also expressed that the data was no longer reported for a single month; NISRA responded that this could be provided through an information request if required but advise using a rolling period of statistics.

Belfast City Council inquired if there were statistics for forecasting, to try and evaluate quiet periods and identify timeframes throughout the year. TNI informed that some companies do survey hotels regarding upcoming bookings to assess occupancy, but this varies a lot as many will not provide due to market sensitivity.

**Action**:

1. NISRA will look into producing estimates on day visitors after National Statistics assessment.
2. Users are to provide links to NISRA illustrating how they use the statistics.

**3.       Quality Reports**

NISRA informed the users that Data Quality reports are now available on the Tourism Statistics webpage regarding all tourism statistics and administrative sources, including non-NISRA sources. This provides methodology and quality in one place; allowing users to assess if the statistics are appropriate to their needs. NISRA presented the guidelines for measuring statistical output quality.

**Accuracy and Reliability**

NISRA explained that key elements are the sample size and response rates. Each source has varying reliability, which is covered in the Quality Reports. Following a previous User Group Meeting, NISRA have published information regarding confidence intervals around their statistics. NISRA showed slides to the users to help explain the confidence intervals around the overnight trips statistics from 2011 to 2015; and how with a 95% confidence interval there has been no statistically significant change year on year. However, there is a general upward trend; and there is a statistically significant growth between 2011 and 2014. Similarly, 95% confidence intervals were presented around the expenditure figures; and whilst there has been a general upward trend seen, there is no statistically significant increase in expenditure from 2011 to 2015.

Fermanagh & Omagh asked if other industries are as honest with their confidence intervals regarding their statistics. NISRA have been honest with their statistics confidence intervals, and have also made this known in PfG targets.

Belfast City Council inquired if confidence intervals were available for the LGD statistics; TSB have agreed to look into this.

Visit Derry asked for clarification that NISRA are saying that in some statistics there is a variation of 20%. NISRA explained that the statistics are based on probability sampling, and therefore statistics will have a margin of sampling error; in order to reduce this by half would mean increasing sample size by four times.

Belfast City Council asked if they should use the lower level of the confidence intervals as a baseline for each year. NISRA informed that the best estimate is the published figure. Fermanagh & Omagh appreciate that the explanation will be included; and asked if the surveys are online. NISRA informed that it is not, but the surveys carried out are a good representation. Online surveys require the respondents to have internet access, time and computer skills and have a low response rate. There is also no way to gusge if they are representative of the population. Visit Belfast agreed that the data quality from online surveys was very poor.

Department for the Economy support what has been done and the draft PfG is about turning the curve on expenditure. This led to discussion on the complexity of expenditure as it involves respondent recall and is impacted by external factors such as exchange rates. Concern was expressed around targets being based on expenditure for the tourism industry.

Visit Belfast asked if there would be confidence intervals made available around the number of nights, NISRA will look into this.

NISRA advised users to look at the confidence intervals around the statistics that they are using e.g. LGD, External Overnight Trips etc.

**Actions:**

1. NISRA will produce confidence intervals around LGD statistics and number of nights**.**

**Timeliness and Punctuality**

NISRA provided an update to the timeliness of Tourism Statistics, location of the publication schedule and informed users of the early indicators.

**Accessibility and Clarity**

NISRA informed users of examples of how to access NI Tourism Statistics, including infographics, reports, excel tables, CSV tables, and interactive web pages. NISRA also pointed out to users that statistics are also available on the NINIS web page; and provided contact details for users to submit ad-hoc requests or ask for further analysis or assistance with statistics.

**Coherence and Comparability**

NISRA made users aware that comparisons are made between the sources used for NI Tourism Statistics; between the surveys and also against previous quarters and years. NISRA also compare NI Tourism Statistics to other sources as well as regional comparisons, e.g. England, Scotland and Republic of Ireland. NISRA also asked that if users are aware of any other sources to forward them on for comparison with NISRA figures.

**Relevance**

NISRA asked the users of the NI Tourism Statistics if their needs were being met; and if given the limitations, would it put users off using the statistics. Fermanagh & Omagh District Council believes the limitations are in line with other statistics in any industry; Visit Belfast agreed and is happy to have figures for benchmarking and being able to see a general trend. Tourism Northern Ireland use the statistics on a daily basis for various queries, they like to know the limitations and caveats and pass these on; they are confident NISRA produce the best statistics available but they really need information regarding day trips and day visitors coming from the Republic of Ireland. Tourism NI conducts a Visitor Attitude Survey and information from this shows a high amount of day trips. NISRA currently collect day trip information on the Continuous Household Survey and Northern Ireland Passenger Survey; however, this information is not collected on the sources provided from the bodies in the Republic of Ireland. Once NISRA have finished the National Statistics assessment process, day trips will be the main focus as NISRA appreciate this area has high user interest and recognise that work will have to be carried out on coach trips, cruise ships and cross border day trips.

Belfast City Council informed that they have been asked to produce a business case for a coach park in Belfast; there is a huge volume coming to NI but there is no secure location in which to park coaches overnight in Belfast. Visit Derry told that Derry has an automated coach park, from which they can provide coach park statistics; coach companies must register with the coach park and sign in, therefore they are able to provide visitor numbers and nationalities.

Fermanagh & Omagh District Council believe that there are different priority segments to different markets for each of the various council areas, which would be benefitted if there was a method to measure if targets are being met.

Ards & North Down Borough Council inquired if there would be more information regarding caravan and camping and in particular the motorhome data; as this is a very important factor in their area, which was agreed with Fermanagh & Omagh District Council. NISRA informed that this is covered in the surveys, but this section has a very low response rate.

**Action:**

1. NISRA to look into Caravan & Camping data to see if there is anything available at a level lower than NI; and do the same for activities participated on during overnight trips in NI.

**Next Steps:**

NISRA informed users that reports will all be available in one place, and that the reports may be restructured. NISRA would also like users to forward examples of how they have used the data in their work areas.

**Questions:**

Tourism Northern Ireland found the meeting very useful; uses the statistics daily and very much appreciate them.

Visit Derry said how Central Statistics Office in the Republic of Ireland releases data quicker than NISRA and asked if NISRA could close this gap. NISRA informed that NI Tourism Statistics contain data from the CSO sources and cannot be published until the figures have been received from CSO therefore causing the time delay.

Fermanagh & Omagh District Council asked if the branch have enough resources; NISRA informed them that there is a vacant post but enough resources once this has been allocated.

NISRA thanked the users for their time and input, and informed them that the event had been very valuable; NISRA will hold another user group meeting in the future.