

NORTHERN IRELAND OFFICIAL TOURISM STATISTICS METHODOLOGY AND PROPOSED DEVELOPMENTS – MAIN PAPER

Background

1. Tourism is an economic phenomenon concerning the movement of people to places outside their usual environment¹. Its measurement is governed by a set of internationally recognised recommendations, which allow comparisons to be made between countries and across time in a standardised way.
http://unstats.un.org/unsd/publication/Seriesm/SeriesM_83rev1e.pdf. Official tourism statistics for Northern Ireland are produced by the Northern Ireland Statistics and Research Agency (NISRA) in line with these recommendations.
2. The production of tourism statistics by NISRA is also conducted in line with the principles of the Official Statistics code of Practice. These principles require that NISRA produces official statistics to meet the requirements of informed decision making by government, public services, business, researchers and the public. They include an obligation to produce statistics impartially and objectively, using sound methods and assured quality to meet user needs. The code makes clear that at all stages in the production and dissemination of official statistics, the public interest should prevail over organisational, political or personal interests.
3. Official Statistics are those produced by a government department, crown body or an organisation listed in an Official Statistics Order. NISRA (DFP) statisticians took over responsibility from the NI Tourist Board (NITB) for the production of tourism statistics in 2010. This was to ensure such statistics met the requirements of the Code of Practice for Official Statistics, as NITB is not a crown body.
4. From April 2013 DETI has taken over funding for such statistics from NITB. This reflects the fact that DETI is the senior responsible owner for the tourism targets in the Programme for Government and has overall responsibility for both

¹ 'Tourism' means the activity of visitors taking a trip to a main destination outside the usual environment, for less than a year, for any main purpose, including business, leisure or other personal purpose, other than to be employed by a resident entity in the place visited. The overnight stay is the criterion to distinguish tourists from same-day visitors.

inbound and domestic tourism (see below). This is an administrative and accounting change and NISRA will continue to produce official tourism statistics to the standards of the Code of Practice. As well as DETI key users include the NI tourist board, Tourism Ireland, economic commentators, the Office for National Statistics and the Central Statistics Office.

Scope of tourism statistics

5. Tourism activity can be considered from either the “demand” side; i.e. tourists as consumers, or the “supply” side; i.e. from the perspectives of those industries or businesses providing products or services to tourists. On the demand side three basic forms of tourism are usually distinguished under the international guidelines:-
 - a. Inbound tourism (visits from non residents),
 - b. Domestic tourism (visits by residents within their country of residence).
 - c. Outbound tourism (visits by residents outside their country of residence).
6. NISRA focuses on measuring the contribution of (a) inbound and (b) domestic tourism for Programme for Government (PfG) purposes and some limited elements of outbound tourism (c) visits to RoI and GB as part of a reciprocal arrangement with authorities in RoI and GB. The PfG target related to tourism in 2012 was to “increase tourism revenue to £597m and tourism visitor numbers to 3.87million”.

Sources

7. Measurement of progress to the PfG target involves compiling a number indicators , sourced from different surveys on the demand side:-
 - a. Inbound Tourism
 - i. Overseas tourists (staying at least one night)
 1. those exiting through a Northern Ireland airport or port (using the Northern Ireland Passenger Survey (NIPS));

2. those exiting through a Republic of Ireland (RoI) airport or port (using data from Fáilte Ireland's Survey of Travellers and Central Statistics Office (CSO) information);
 - ii. RoI residents who stayed at least one night in Northern Ireland (using CSO's Household Travel Survey);
 - b. Domestic tourism
 - i. Northern Ireland (NI) residents who make overnight trips within Northern Ireland (using NISRA's Continuous Household Survey).
8. Visitors are further defined on the demand side by the purpose of their visit. A visitor is someone who is travelling under certain conditions, namely, for (i) holiday, leisure and recreation; (ii) visiting friends and relatives; (iii) business, or (iv) other purposes (health, education or other). Importantly, not all visitors are considered as tourists under the international guidelines. A visitor (domestic, inbound or outbound) is classified as a tourist if his / her trip includes an overnight stay. Otherwise they are considered as a same-day visitor (or excursionist). The NISRA survey of NI residents also measures same day trips, but this is not included in the PfG target as they do not meet the international definition of tourist.
9. On the supply side, estimates of room and bed space occupancy are provided by NISRA surveys of (i) hotels and (ii) B&Bs, Guest Houses and Guest Accommodation. The hotel occupancy survey is issued to all certified hotels and the other B&B/GH/GA survey is a disproportionate stratified sample from the NITB register of such premises. Annually, NISRA also carries out a survey of all self-catering establishments from the NITB register to gather information on their occupancy. NISRA also carries out a visitor attraction survey and publishes figures sourced directly from visitor centres such as the Giant's Causeway on an annual basis. Some of these centres are able to provide information on the country of origin of visitors.

Methodology

10. A summary of the methodology employed in each of the surveys used to produce official tourism statistics is provided below, with further detail available in Appendix A. Table 3 below shows the breakdown of the demand side of tourism statistics in 2010, indicating the relative importance in terms of visitor numbers from each of the survey sources. NISRA has responsibility for two of these sources, which covered 73% of tourist visits in 2010. For the other two sources the Agency receives information from Failte Ireland or CSO. The CSO Household Travel Survey data has been delayed with 2011 results published in October 2012 and results for 2012 anticipated by mid-June 2013. This source accounted for 14 per cent of tourism visitors to Northern Ireland in 2010.

Table 3:- NI 2010 final estimates of overseas and domestic tourism visitors

Source of overnight visitor data	% of total
1. Direct GB and overseas visitors (NISRA Passenger Survey)	31
2. GB and overseas visitors via the RoI (Failte Ireland Survey of Travellers (SOTs))	12
3. RoI residents' visits (CSO Household Travel Survey)	14
4. Domestic - NI residents visiting in NI (NISRA Continuous Household Survey)	42
Total	100

Direct GB and Overseas Visitors – N. Ireland Passenger Survey (NIPS)

11. The NIPS (para 19a(i)1 above) is conducted by NISRA at NI's main air and sea ports and measures the number of GB and overseas visitors who stayed at least one night in NI and exited via a NI air or sea port. The survey collects information on the number of visitors, their expenditure and the number of nights spent in Northern Ireland by country of residence and purpose of visit. NISRA has significantly improved the sampling and data collection process using a short form administered to every 5th passenger by computerised pen tablet. A longer form was administered to every 10th (from 2013 every 20th) passenger to collect

more detailed information on their visit used by NITB and Tourism Ireland for market intelligence purposes. Over 16 thousand direct tourism visitors provided information in the 1 in 5 NIPS sample in 2010.

GB and overseas visitors via the RoI (Survey of Overseas Travellers)

12. The Survey of Overseas Travellers (SOT) (para 19a (i) 2 above) is conducted by Fáilte Ireland at the main air and sea ports in the Republic of Ireland (ROI). Fáilte Ireland (FI) sample for 2011 was c. 6,000 and FI provide NISRA with data from this survey on the number of GB and overseas visitors who stayed at least one night in NI and exited via a ROI air or sea port (in return for reciprocal data from NISRA). These are often referred to as “VIAS” or ‘via ROI’ GB and overseas visitors, of which there were c. 530 respondents in 2011.
13. The SOT is currently weighted by month, by route and by country of residence from the “Country of Residence” survey administered by CSO (see Appendix A) to gross back to population levels. Fáilte Ireland then provides NISRA with information on the number of visitors to Northern Ireland by country of residence and purpose of visit plus expenditure and number of nights by country of residence.
14. NISRA would welcome user views on the continued use of Fáilte Ireland SOT’s estimates of overnight visitors to NI (based on a small annual sample size) while awaiting the development of potential alternative sources of this information.
15. The Fáilte Ireland estimates are not official statistics within the meaning of the Code of Practice, and it is not possible to provide confidence intervals for these estimates, given the nature of the sample design. However NISRA is proposing publishing these externally provided estimates in its annual tourism statistics publication (scheduled for 6 June 2013) in order to provide a more complete picture of tourism estimates. These estimates will also help inform progress towards PfG targets.

ROI Residents Visits (Household Travel Survey)

16. The Central Statistics Office (CSO) in ROI conducts a Household Travel Survey (HTS) (para 17a (ii) above) to measure international and domestic travel patterns (including overnight stays) of ROI residents. Information is provided from this survey on ROI residents' overnight trips to NI. Information is collected through a postal survey of private households. The HTS is based on a random stratified sample. Each month, over 4,600 households (or approximately 0.3% of all private households) are randomly selected from the Electoral Register, where the selection is stratified by District Electoral Division. The survey has a response rate of c. 40%. Data for NI is based on a small sample of around 200 respondents annually who report an overnight visit to NI. CSO have advised that it is not possible to provide confidence intervals around estimates of visitor numbers to NI from this survey at this time. Given that quarterly estimates would be based on even smaller numbers, NISRA is considering publishing this information annually rather than quarterly. The 2012 estimates will be published in NISRA's annual tourism statistics publication (scheduled for 6 June 2013) in order to provide a complete picture of visitor numbers, with information regarding sample sizes. Users views are welcome on the appropriate frequency of publication given the sample size issues.

Domestic - NI residents visiting in NI (Continuous Household Survey)

17. The NI Domestic Tourism Survey is delivered as a module within the Continuous Household Survey (CHS) (para 19b (i) above). The CHS is conducted by NISRA and is used to provide information on a wide range of social and economic issues relevant to NI, including the number of overnight and leisure and tourism day trips² taken by NI residents in NI. The CHS was introduced in 2011 representing a significant improvement in the sampling process previously used. The survey is based on a systematic random sample of 4,500 addresses drawn each year from the Land and Property Services Agency's (LPSA) list of domestic addresses. Data is collected by interview and the interviews are spread equally over the 12

² A leisure day trip is an outing or trip, not for business purposes, made on the same day from home with no time or distance restriction. A tourism day trip is a leisure day trip taken outside the respondent's usual environment where they are away from home for more than three hours.

months from April to March. There were some 2,750 respondents to the survey as a whole, resulting in information on 400 overnight trips within NI. While a sample base of this size introduces volatility into the quarterly estimates, NISRA publishes confidence intervals around the estimates so that users are aware of their limitations in this context. The sample size also limits the extent to which it is possible to provide sub – Northern Ireland estimates.

Occupancy Surveys (Supply Side)

18. The monthly Hotel and Bed & Breakfasts (B&Bs, Guesthouse (GH) and Guest Accommodation (GA) Surveys are conducted by NISRA. All hotels and a random sample of B&Bs/GHs and GA are sent a monthly form to complete detailing the number of rooms and beds available and occupied each month. The form also collects information on the origin of arrivals and guests, which is published on the official tourism statistics web site. The same information is collected from the self-catering occupancy survey annually.

Developing NI Tourism Statistics

Timeliness and Completeness

19. A key objective of official tourism statistics is to provide information that achieves a balance between timeliness and completeness to aid user understanding of the performance of the tourism industry and its contribution to the economy. However, information on the various components of tourism statistics becomes available at different times from the different survey sources see Table 4).
20. Historically, the relevant monthly reports were published separately as soon as they become available with a quarterly summary report. In line with best practice, these publications typically included provisional figures with revisions being subsequently included when further information became available.

Table 4:- Current Frequency and Timeliness of tourism statistics releases

Source of overnight visitor data	Frequency	Timeliness (from end of reference period)
1. Direct GB and overseas visitors (NISRA Passenger Survey)	Monthly	6 weeks
2. GB and overseas visitors via the RoI (Failte Ireland Survey of Travellers / CSO)	Quarterly	12 weeks
3. RoI residents' visits (CSO Household Travel Survey)	Delayed	Expected 12 weeks from April 2013
4. Domestic - NI residents visiting in NI (NISRA Continuous Household Survey)	Monthly	10 weeks
5. Occupancy of Hotels, Guesthouses, B&Bs	Monthly	7 weeks
6. Visitor Attraction surveys	Annual	12 weeks
7. Self-catering Occupancy Survey	Annual	12 weeks

21. The approach of publishing individual sets of results as soon as they are available has given primacy to making official statistics available in as timely a fashion as possible. However given the partial nature of the coverage of some of the sources (e.g. full information on tourism visits by GB and overseas residents requires information from both NISRA's NI Passenger survey and CSO's Survey of Travellers), this can result in information being somewhat disjointed with associated difficulty in appreciating how any individual element relates to the complete picture of tourism visits.

22. To achieve a better balance between timeliness and completeness it is proposed that a single official statistics tourism publication will report every quarter, some 13 weeks after the end of the reference period. This is broadly similar to other short term economic statistics. The quarterly summary publication will include:-

- a. overseas visitor numbers including information from both sources (NIPS and the Survey of Travellers, separately identified);
- b. Information on domestic tourism from the Continuous Household Survey.
- c. Hotel, Guest House, Bed & Breakfast and Guest Accommodation Occupancy survey data (drawn from the monthly series)
- d. User views are sought on whether to publish quarterly information from the Household Travel Survey (on ROI residents' overnight visits) given the small sample size (c. 200 over the year), or to report these annually. The 2012 HTS results for NI are currently scheduled to be published 6th June 2013 (subject to availability from CSO) to help provide a complete picture as possible. Information will also be published on the sample size to help inform users of the robustness of the estimates;

23. Should the external (CSO) sources be significantly delayed, NISRA will either review its pre-announced publication date (e.g. if available within 6 weeks of the NISRA publication date) or publish the remaining sources in the quarterly publication with a clear indication that this is a partial picture.

24. In order to provide a timely lead indicator it is proposed that NISRA will also continue to publish its hotel, guest house, B&B Occupancy publication on a monthly basis. Regional occupancy estimates will be included in the quarterly publication.

Precision of the estimates

25. The confidence intervals associated with the NI Passenger Survey and the Continuous Household Survey are provided in tables 2 and 4 below. NISRA is seeking user views on the appropriateness of these statistical margins of error for tourism purposes.

26. Views are also sought on whether it would also be useful to report tourism visitor survey estimates for the latest 12 months against the previous 12 months, as well

as quarterly and year to date information. While this would extend the reference period for visitor surveys such as NIPS, it would help improve the precision of the estimates.

27. NISRA is examining the feasibility of producing additional sub-regional tourism estimates for Northern Ireland, beyond those already produced for occupancy statistics. However, this is only available from NISRA sources for overseas (para 4(i) above) and domestic tourism (para 4(iv) above) measures and would contain relatively high margins of statistical error for annual estimates. There are also constraints on disaggregating SOTS and HTS results to sub regional levels, which could mean sub-regional results only provide a partial picture of visitors. There are also practical constraints at airports and ports of increasing sample sizes in an attempt to gain more reliable data, and any such increases would incur additional costs.

28. An earlier Review of Northern Ireland Tourism statistics concluded “The survey data are used to provide estimates of tourism at the local authority level, but the sample sizes are not generally robust enough for analysis at this level. Rather than suggest an expansion of the sample size to cater for the needs of the 26 district councils, which would need a massive increase in investment, analysis should be confined to the Regional Tourism Organisation level, until the current review of local authorities is complete. Even so, sample sizes of unweighted data should be scrutinised before publishing any data (this does take place) and we would recommend nothing based on sample sizes of less than 100 should be released.” NISRA is proposing to adopt this approach and also to provide sub – Northern Ireland estimates based on combined rolling annual averages. Users views on this or other preferred approaches are welcomed.

29. It is not currently possible to obtain confidence intervals on either the Survey of Travellers (SOTs) or Household Travel Survey (HTS) information. As mentioned earlier, NISRA is proposing publishing SOTs information separately in the proposed quarterly official tourism statistics bulletin, with suitable caveats regarding sample size. User views are also sought on whether it is preferable to publish quarterly HTS information, given that the current annual sample

administered by CSO only achieved 200 ROI residents who stayed at least one night in Northern Ireland. The alternative is to wait until the annual results are available, though this would mean the quarterly picture of overnight visitors (NIPS, CHS, SOTs) would be incomplete. ROI residents comprised 14% of all overnight visitors to NI in 2010.

30. It is proposed to continue publishing Hotels, Guest houses, B&B and Guest Accommodation Occupancy statistics on a monthly basis. As the hotel occupancy and self catering surveys are censuses, there is no requirement for confidence intervals. Work is planned to develop confidence intervals for other occupancy surveys in late 2013.

Cruise Ships

31. Visitors from cruise ships are not usually included as part of tourist estimates as they are typically not overnight visitors but overseas day-trippers. They do not therefore meet the international definition of a tourist, which depends on the visitor making an overnight stay. It should be noted that where cruise ship passengers visit a NI attraction they will be counted as a visitor in official statistics on numbers of visitors to tourism attractions.
32. Data is available on the number of passengers and crew on cruise ships coming into Ireland (from Belfast Visitor & Convention Bureau (BVCB) and Derry Visitor & Convention Bureau (DVCB) but NITB's experience is that it is very difficult to get accurate numbers of how many disembarked at each port, or how much they spent on the day trip. NISRA is proposing to include the data on the number of cruise ships and passengers on board in the quarterly summary bulletin for information, subject to availability from suppliers.

Coach visits

33. Those overseas and ROI residents who arrive by coach to stay overnight in Northern Ireland are already estimated by surveys of ports, airports and ROI residents (though not distinguished separately). Coach visits are difficult to enumerate and it is not proposed to measure these separately.

Conclusion

34. NISRA has made a number of improvements in recent years to the sampling procedures and data collection methods in those tourism surveys for which it is responsible (NIPS and CHS). Official tourism statistics are conducted impartially and objectively, using sound methods and assured quality to meet user needs in line with the Official statistics Code of Practice. Developments to the way in which statistics are produced and disseminated are ongoing and in line with the Code, NISRA is seeking as wide a range of user views as possible to help inform these developments. The main issues arising from this paper are listed after the Summary (pages 6-7).
35. Submissions can be sent to tourismstatistics@detini.gov.uk by 21st June 2013. User views are also welcome at other times either by correspondence or attendance at NISRA's User Group meetings <http://www.detini.gov.uk/deti-stats-index/stats-national-statistics/user-consultation-and-information.htm>