

Background

- 1.1 The Northern Ireland Statistics and Research Agency (NISRA) is responsible for producing official tourism statistics for Northern Ireland. The statistics are produced by following internationally recognised recommendations (http://unstats.un.org/unsd/publication/Seriesm/SeriesM_83rev1e.pdf) and in accordance with the principles of the Code of Practice for Official Statistics (<http://www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html>).
- 1.2 As required by the Code of Practice for Official Statistics, NISRA seeks to engage effectively with users of statistics to promote trust and maximise public value, and to investigate and document user needs. Accordingly, NISRA launched a public consultation in May 2013 seeking user views on official tourism statistics for Northern Ireland. The consultation took the form of a consultation document with supporting documents made available to download from the DETI website http://www.detini.gov.uk/deti-stats-index/tourism-statistics/user_engagement.htm. This link was also forwarded to approximately 40 known users of the statistics including district councils, NITB, government and researchers.
- 1.3 The main purpose of the consultation was to seek views on the coverage, development and reporting of the statistics. To aid the feedback process, respondents were asked to focus on 8 specific issues with a further option to feed back on any aspect of tourism statistics. This document summarises users' views as required by the Code of Practice and provides NISRA's response, including priority setting.
- 1.4 NISRA continues to welcome user views at any stage through 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>.

Consultation responses/NISRA responses

Fourteen written responses were received with additional comment provided at a specialist user group meeting held on 25 June 2013. The specific areas on which views were sought are highlighted below along with respondents' views on each. The full list of respondents can be found in the Appendix.

2.1 NISRA proposed moving from the existing separate monthly publications of the main tourist sources:-

- a) Direct overseas visitors (NI Passenger Survey (NIPS));**
 - b) Direct overseas visitors (above) plus indirect visitors ('VIAS') departing via the Republic of Ireland (RoI), from Bord Failte's Survey of Overseas Travellers (SOTs);**
 - c) NI residents' overnight trips within NI (from NISRA's Continuous Household Survey);**
- to quarterly publications including all of the above plus a quarterly measure of RoI residents' overnight trips to Northern Ireland (from the Central Statistics Office's Household Travel Survey (HTS)). In addition, the quarterly report would include the main quarterly summaries of previously published (monthly) occupancy statistics.**

All respondents who provided a specific response to this item agreed with the proposal to move from separate monthly publications to quarterly publications. The main theme throughout the responses was the production of timely, quarterly, complete publications.

NISRA response

NISRA will publish all main sources (direct overseas, 'VIAS', domestic NI and RoI visitors and quarterly summaries of occupancy statistics) in a quarterly publication. The publications will include overall cruise ship data supplied by the Belfast and Derry Visitor Convention Bureaus.

2.2 The continued monthly publication of Hotel/Guesthouse and B&B occupancy figures as a lead indicator;

Respondents supported the continuation of the occupancy publication on a monthly basis. There were some suggestions to include a regional breakdown of the data within the report. There was also a request for monthly self-catering occupancy statistics.

NISRA response

NISRA will continue to publish monthly occupancy statistical bulletins for hotels, bed and breakfast, guest house and guest accommodation statistics to provide a lead indicator of tourism trends that will complement the quarterly publications. NISRA does not propose to move to a monthly self catering occupancy survey as this would involve a significant increase to the respondent burden. NISRA will, however, continue to review this and other

potential areas for development once priority issues have been addressed.

2.3 The appropriateness of existing statistical margins of error

Respondents reported that they would like to see the statistical margins of error reduced but recognised that more resources would be required to achieve meaningful improvements. One respondent reported concern that the margin of error for domestic overnight visitors was significantly higher than annual overseas visitors and requested further investment to improve this.

NISRA response

Significant improvements in precision would require marked increases in the NISRA and RoI visitor survey sample sizes which would require significant additional resources. Should such resources not become available, NISRA will report on a rolling annual basis, and will limit the level of disaggregation at which quarterly results are reported to maximise the use of the existing sample. It should be noted that NISRA is only responsible for administering NI based surveys and is not responsible for establishing resourcing levels which impact on the sample size of RoI surveys.

2.4 Reporting tourism visitor survey estimates for the latest 12 months against the previous 12 months, as well as quarterly and year to date results. This will improve the precision of the estimates, though with some loss of timeliness.

Respondents supported this proposal provided that quarterly and year to date statistics were still made available.

NISRA response

NISRA plans to publish statistics comparing the most recent 12 months data with the previous 12 months data along with quarterly and some year to date results. The publications will highlight any sample size limitations as surveys based on smaller sample sizes will likely exhibit greater degrees of volatility. Annual publications will include data on the self-catering occupancy and visitor attractions as these are conducted on an annual basis.

2.5 Sub-Northern Ireland annual estimates will be limited to combinations of District Councils and based on 100 or more visitors. NISRA sources for overseas and domestic tourism will also be combined to provide rolling bi-ennial (or tri-ennial) estimates.

This issue generated a large number of responses with users reporting that they were very

keen to get local authority information as soon as possible. The most recent local authority estimates were published in 2009 and users reported that they need these statistics in a timelier fashion. The lack of these statistics is viewed by some users as a barrier to local economic growth and strategic tourism development. Respondents urged NISRA to prioritise the availability of these statistics, not only to enable the production of timely headline data but also to enable users to further develop this area.

Some users expressed an interest in meeting with NISRA to discuss possible geographies on which sub regional data could be produced. This approach was also suggested by the specialist users group who recommended the development of a workshop with local councils. The specialist user group raised the need to improve transparency around the overall methodology in calculating tourism statistics while other respondents reported that even if there are small sample sizes the statistics should be made available along with appropriate caveats to highlight the small numbers involved.

The specialist user group also suggested NISRA consider producing occupancy rates and visitor attraction data at sub-regional level.

NISRA response

NISRA recognises the demand for local authority information and is currently investigating possible methodologies to produce these statistics. There are however inherent limitations in disaggregating demand side measures (surveys of visitors at ports, or in households) to provide even annual measures at District Council level, because of sample size constraints. NISRA will therefore investigate the use of (i) rolling annual surveys for District Councils and (ii) grouping of District Councils. NISRA will also examine the feasibility of providing other information at sub-regional level such as employee jobs in respect of the tourism characteristic industries. NISRA has held a user group meeting with some local authorities at which a way forward on the provision of appropriate local authority statistics was proposed. These data will be provided to the meeting attendees with the aim of distributing to all District Councils once format is agreed. Summary minutes of this meeting will be published by NISRA when they become available.

There was a request for additional information to the 'value and volume' of visitors to specific visitor attractions. Many visitor attractions would find this difficult to do and it could involve a considerable additional respondent burden. NISRA do not currently plan to prioritise this issue above the other areas requiring development or to produce visitor statistics at a lower geographical level than District Council due to concerns about small sample sizes and their impact on reliability.

2.6 Changing pre-announced publication dates if external sources are significantly delayed

For example, if statistics from RoI sources are expected within 6 weeks of the pre-announced NISRA publication date NISRA is proposing to delay its publication date to include these. Alternatively, if the external sources are not available within 6 weeks NISRA propose to

publish the remaining sources in the quarterly publication with a clear indication that this is a partial picture. The alternative is to delay publication of all quarterly tourism statistics until the external sources are available.

Only one respondent requested that NISRA wait until all sources are available before publishing any source for a particular reference period. All other respondents reported that while they would prefer to get complete data, they believed that greater timeliness and adhering to pre-announced publication dates took priority.

NISRA response

NISRA is committed to the publication of statistics in a timely manner. To ensure completeness, and to reflect user views that a 6 week delay was too long, NISRA will consider delaying publication for up to 3 weeks from the pre-announced publication date if there is a delay in the availability of any of the external data sources. However, any delay will be balanced against the need for timeliness, completeness and adherence to pre-agreed publication dates where possible.

2.7 Publishing Failte Ireland (Survey of Travellers (SOT)) estimates of GB and overseas visitors to NI who depart through the RoI in NISRA's quarterly publication, while making it clear the sample size limitations.

Respondents agreed that NISRA should publish the SOTs as they are viewed as fit for purpose by RoI. A key user reported that they welcomed more investigation into using PCI from the beginning of 2014 as a possible alternative to SOTs.

NISRA response

NISRA will continue to include SOT visitor numbers in its quarterly bulletins on the basis of a rolling 3 year annual average for the relevant quarter, to address volatility issues in this source. NISRA will keep under review the potential use of PCI results when these become available next year for NI visitors, from CSO. The three year rolling average should help to address the volatility issue with the SOTs. NISRA is also aware of other limitations regarding the use of the PCI, not least the absence of NI expenditure data. CSO plan a significant revision of the methodology of the PCI and the associated Country of Residence survey to address known methodological issues. NISRA will take this into account when deciding whether to publish next year's CSO data from the PCI as an alternative or additional source of information regarding visitors to NI.

2.8 NISRA is seeking views on whether to publish CSO's (Household Travel Survey) estimates of RoI overnight visitors to NI who depart through the RoI in its annual publication, rather than its quarterly publication. This is because the annual sample size may be too small for robust quarterly estimates.

The majority of respondents supported NISRA's suggested annual publication of the HTS. However, some would still prefer quarterly publications of the HTS whereas others would

like a commitment to enhancing the sample size which in turn would increase confidence in the statistics.

It was noted that the source for NI resident's overnight and day trip data is based on a small sample. There was a suggestion that NISRA should focus their resources on increasing the sample size and, in turn, the confidence around the domestic travel statistics.

NISRA response

The RoI's Central Statistics Office is currently publishing HTS, including NI results, quarterly. NISRA's quarterly tourism publication will therefore continue to include data from the HTS, combined with other sources, though noting the relatively small sample size where appropriate. This will also limit the extent of disaggregation of quarterly results from the CHS and HTS sources, though rolling annual series will be available for this purpose. NISRA will continue to keep the sample size/resources issue under review.

2.9 User views welcomed on any other aspect of the tourism statistics methodology paper to inform the development of tourism statistics.

Developing other sources

Feedback was received on NISRA's intentions to publish cruise ship data. Those who commented were keen to see the data included in NISRA's future publications, with the recognition that the results would include crew and passengers who may not necessarily disembark in NI. Derry Visitor Convention Bureau also highlighted that they hold some information on cruise activity on Lough Foyle and also on other marine passengers such as those on yachts/superyachts.

Respondents highlighted other sources of accommodation data (for example caravanning and other non-serviced accommodation) and requested that NISRA investigate these sources of information. A lower geographical level would be of particular interest to users as each destination area can offer different types of accommodation. Respondents also expressed an interest in NISRA analysing the impact of tourism at sub-regional level (direct/indirect employment, value of services etc).

NISRA response

NISRA will publish information on cruise ship numbers received from the Belfast and Derry Visitor Centres in NISRA's quarterly publication. It recognises the interest in obtaining statistics on caravan, camping and other non-serviced accommodation, including at a lower level of geographical detail. However, given that key users' policy focus is on external visitors NISRA will continue to prioritise developments in this area, rather than committing resources at this stage to the measurement of the caravan and camping sector. NISRA will undertake to disaggregate data to a lower level geography (District Council) on employee jobs in tourism characteristic industries, where possible. A user group meeting has been

held with some local authorities to discuss a way forward on the provision of appropriate local authority statistics. Summary minutes will be published on the NISRA web site when these are available.

Timeliness of results

In general, there were some points highlighted by all respondents, notably that timely statistics should be a priority. The perceived delay in publishing 2012 statistics caused some concerns to users. Also, if or when revised statistics are published, it was requested that any 'old' publications be removed from the website when revised statistics are published to avoid any confusion.

NISRA response

To address the issue of completeness, but also to reflect user views that a 6 week delay was too long, NISRA will consider delaying publication for up to 3 weeks from the pre-announced publication date if there is a delay in the availability of any of the external data sources. However, any delay will be balanced against the need for timeliness and adherence to pre-agreed publication dates where possible.

When NISRA publishes any data, it will be marked 'provisional' or 'revised' as appropriate. It will remove any older publications that have been subsequently revised and follow the 'Tourism Statistics Branch Statistics Revisions Policy' as detailed on the following link - http://www.detini.gov.uk/tourism_statistics_branch_statistics_revisions_policy.pdf

The other point raised was the need for local authority estimates. Respondents were keen to get involved in aiding NISRA to produce data for smaller geographies and suggested that some respondents might be in a position to encourage response from the serviced accommodation sector.

Many respondents suggested that NISRA might be able to provide a template or mechanism to undertake visitor analysis or survey work (for example analysis of football events or other events and profiling the visitors attending these events). Similarly, respondents would like the flexibility of adding questions to the NIPS or CHS to measure different events or ventures during the year (for example the Irish Open, G8, etc).

NISRA response

NISRA has held a user group meeting with some local authorities to discuss a way forward on the provision of appropriate local authority statistics.

Summary minutes will be published on the NISRA web site when these are available.

There were also requests for NISRA to provide a template or mechanism to undertake visitor analysis at specific events (for example, football events). NISRA's first priority is to ensure NI level statistics are produced to a consistently high standard and secondly, to establish the quarterly statistics series. This issue was, however, taken forward at the user group meeting with some local authority representatives.

There were requests for flexibility to add/remove questions to NISRA's surveys to obtain information on particular events or ventures throughout the year. Currently, questions are agreed annually for inclusion in the surveys that will maximise response rates while addressing the needs of the user of the statistics. The NISRA surveys are designed to provide information on visitor numbers and trips taken and the sample design/methodology is not suitable to gain feedback on specific events. NISRA also discussed this issue with local authority representatives, DETI and NITB at the recent meeting.

In addition, NISRA will reply directly in response to specific requests that were received as part of the consultation.

Summary

A consultation was launched in June 2013 on Tourism statistics seeking users' views on the completeness, coverage and frequency of publication of the data. User views were sought on a number of specific topics and on any other related issues. Fourteen written responses were received and further feedback was provided at a user group meeting held in June 2013.

There were a number of themes that emerged from the responses that included the need for timely, complete statistics produced on a quarterly, annual and year to date basis. Where volatility exists, this should be clearly indicated. However, the topic that generated a large number of responses was the need for data at sub-regional geographies.

NISRA has considered respondents' views on all of the issues raised and has provided the above response in line with the Code of Practice for Official Statistics. A timetable will be drawn up that will identify key actions to be taken by NISRA in response to this consultation and updated quarterly on the tourism statistics web-site.

The first publication of annual and quarterly tourism statistics to March 2013 on the new basis will be published on 27th September 2013 at <http://www.detini.gov.uk/deti-stats-index.htm>