

NORTHERN IRELAND OFFICIAL TOURISM STATISTICS METHODOLOGY AND PROPOSED DEVELOPMENTS

SUMMARY

MAY 2013

Introduction

1. This paper includes information on the methodology employed for each of the sources used by NISRA to produce official tourism statistics. Further background on the various sources can be found at the following link:-
<http://www.detini.gov.uk/deti-stats-index/tourism-statistics.htm>. The paper includes some proposed developments in the methodology of official tourism statistics and the frequency and timing of their publication. A summary of the issues raised in the paper is provided at page 4 below.

2. User views are sought on these proposals in line with the requirements of the [Code of Practice for Official Statistics](#) . Submissions are sought by 21st June and can be sent to tourismstatistics@detini.gov.uk. 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>

Summary

3. NISRA publishes tourism statistics in line with the principles of the statutory Code of Practice for Official Statistics. This includes an obligation to produce statistics impartially and objectively, using sound methods and assured quality to meet the requirements of informed decision making by users. NISRA has been involved in recent years in a programme of development of tourism statistics and is currently seeking user views on further proposed changes in their reporting and development.

4. NISRA has historically published information monthly on
 - (i) GB and overseas overnight tourism visits who depart from a NI airport or port (using the NI Passenger survey (NIPS)). The achieved sample size for the NIPS was c. 16,000 (including partial completions) in 2011.

This is supplemented quarterly by:-

- (ii) information about GB and overseas overnight visitors to NI who depart via the Republic of Ireland (RoI) "VIAS" (currently provided from Failte Ireland's Survey of Overseas Travellers (SOT)). The achieved sample size of such overnight visitors to NI was c. 530 in 2011.

A full picture of external visits additionally requires quarterly information on:-

- (iii) over-night visits to NI from RoI residents (RoI Central Statistics Office's (CSO) Household Travel Survey (HTS)). The latter information has been significantly delayed in 2011 and 2012 but is expected to resume quarterly supply after the publication of 2012 results by mid June 2013. The achieved sample size of ROI visitors to NI was c. 200 in 2011.

The final element of tourism statistics used to measure progress to Programme for Government (PfG) targets is:

- (iv) NI domestic tourism, which has been published monthly (from the NISRA Continuous Household Survey (CHS)) in which there were some 2,750 respondents in 2011. This resulted in results for c. 400 overnight visits in NI.

NISRA also publishes monthly hotel/B&B/Guesthouse occupancy estimates and annual self-catering and annual visitor attraction figures.

5. In 2011 and most of 2012, NISRA published (i) and (iv) above monthly, in order to provide information in as timely a fashion as possible. A quarterly summary was also published when the other sources become available. However, the provision of monthly information on GB and overseas visitor numbers from the NIPS in isolation provides an incomplete picture. Quarterly Failte Ireland (SOT) figures of overnight visitors to NI who leave via the RoI are required to provide a full picture of GB and overseas visits. Publication of monthly reports can also lead to difficulty in appreciating how any individual element relates to the complete picture of tourism visits.

6. It is therefore proposed to publish the different sources (Overseas (NIPS, SOT), Domestic (CHS) and potentially including RoI resident visits to NI (HTS (subject to user views))) above in a single publication on a quarterly basis to provide as complete a picture as possible across the available sources. A quarterly summary of previously published monthly occupancy results would also be included for completeness. Should the external (CSO / Failte Ireland) sources be significantly delayed, NISRA will either review its pre-announced publication date (e.g. if available within six 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.
7. NISRA uses Failte Ireland's Survey of Overseas Travellers' (SOT) estimates of those overnight visitors to N. Ireland who depart via the Republic of Ireland, as described in the following review http://www.itic.ie/fileadmin/docs/ITIC_STATS_FINAL_REPORT.pdf. Such visitors comprised some 28% of GB and overseas visitors (or 12% of all overnight visitors, when NI and RoI residents are included) to Northern Ireland in 2010. However, the SOT is based on a relatively small sample size (527 NI visitors in 2011), for which it is not possible to provide confidence intervals, given the nature of the sample design.
8. Discussions are ongoing with the Central Statistics Office as to whether more robust information can be made available from the Passenger Card Inquiry (PCI). However, this survey does not include any estimates of tourist spend in Northern Ireland. First NI results from this source are also not expected to be available until May 2014 and NISRA has also been advised that the methodology employed on the PCI may be subject to review. In the interim it is proposed to keep using the SOT based estimates, though the NI sample element limits the robustness of estimates. Users' views are sought on this approach.
9. Another element of the total estimate of overnight visitors to NI is provided by CSO's Household Travel Survey. This provides estimates of overnight visitors to NI from the Republic of Ireland (RoI) and these represented 14% of all overnight visitors to NI in 2010. HTS results are expected to become available quarterly

from June 2013. However, while the sample size was considered effective for RoI purposes, it resulted in NI estimates being based on 200 respondents in 2010. This limits the robustness of the annual (and even more so of any quarterly) estimate of overnight visitors, who are resident in the RoI. NISRA is seeking user views on whether to publish such estimates quarterly, with appropriate caveats regarding their robustness or to publish such estimates annually. An annual estimate would mean that the quarterly estimate of overnight visitors would be incomplete, as it would exclude overnight visitors from the RoI.

10. There is also considerable interest in sub-regional estimates of the numbers visiting and staying in different locations across Northern Ireland. This is currently estimated by a combination of occupancy surveys (hotels, B&B, etc) and visitor attraction surveys across Northern Ireland. NISRA welcomes user views on whether these sources are meeting user needs. It should be noted that the level of geographical disaggregation of results from other sources (NIPS, CHS, SOTS, HTS) which provide richer detail about tourists, is essentially a function of their sample sizes. The current sample sizes provide relatively wide statistical margins of error at e.g. District Council level. The domestic measure of NI resident overnight visitors (CHS), for example, was based on less than 400 persons in 2011, limiting the amount of disaggregation possible. There are both financial and practical constraints on increasing the sample sizes of the NIPS and CHS.
11. In line with the recommendations of an earlier Tourism Statistics Review (http://www.detini.gov.uk/ttc_review_of_tourism_statistics_final_report_october_2005.pdf) NISRA is proposing limiting sub-NI estimates to those based on 100 or more visitors. It is also proposed to use combined rolling annual estimates to improve the level of disaggregation possible from the current surveys and to increase precision of high level estimates.
12. NISRA will continue to publish its monthly Hotels, Guest Houses and Bed & Breakfast Occupancy bulletin on a monthly basis as a timely lead indicator with quarterly regional results. This approach has been agreed with DETI. The views of users on other aspects of methodology (such as the statistical margin of error) are also being sought.

Cruise Lines and Coach Numbers

13. 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. Although, where cruise ship passengers visit a NI attraction they will be counted as a visitor in official statistics on such attractions. NISRA is nevertheless proposing to include the data on the number of cruise ships and passengers on board in the quarterly summary bulletin for information, as provided by the Belfast and Derry Visitor and Convention Bureaus.

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

15. **Day trips**
NISRA will continue to publish estimates of domestic day trips (by Northern Ireland residents within Northern Ireland) in its new quarterly publication. While not meeting the formal definition of tourism, which requires an overnight stay it is an important dimension of the wider tourist economy. Such visits and indeed day visits from Republic of Ireland residents are also recorded in visits to Northern Ireland attractions. It should be noted that there is limited additional information on day trips from ROI residents, which is particularly difficult to measure.

16. The issues are summarised below and 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>

SUMMARY - TOURISM STATISTICS ISSUES FOR USER VIEWS

Users views are sought on:-

- i) the NISRA proposal to move from separate monthly publications of its main indices (overseas, overseas plus “VIAS” and domestic visitor numbers) to quarterly publications including all main sources (overseas, “VIAS”, domestic with quarterly summaries of monthly occupancy statistics – see below).
- ii) The continued monthly publication of Hotel / Guest House and B&B occupancy figures as a lead indicator.
- iii) the appropriateness of existing statistical margins of error:-
 - (a) Annual overseas visitors +/- 6-10% for key markets.
 - (b) Domestic overnight visits (+/- 14%);given that it is very expensive to significantly improve precision (more tourists have to be interviewed).
- iv) 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.
- v) Sub-Northern Ireland annual estimates will be limited to combinations of District Councils and based on 100 or more visitors. NISRA sources for overseas (NIPS para 4(i) above) and domestic tourism (CHS para 4(iv) above) will also be combined to provide rolling bi-ennial (or tri-ennial) estimates.
- vi) Changing pre-announced publication dates if external (CSO / Failte Ireland) sources are significantly delayed. For example, if these 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.

- vii) Publishing Failte Ireland (Survey of Travellers) estimates of GB and overseas visitors to NI who depart through the RoI in NISRA's quarterly publication, while making clear the sample size limitations (c. 530 in 2011).
- viii) NISRA is seeking user 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 or quarterly publication. Quarterly estimates are not likely to be particularly robust and it is not possible to provide confidence intervals around either the quarterly or annual estimates.
- ix) User views are welcome on any other aspect of the tourism statistics methodology paper to inform the development of such official statistics.

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>