**Minutes**

**All Island Tourism Statistics Liaison Group**

16 June 2016

10:30 a.m. – 12:30 p.m.

**Fáilte Ireland**

88-95 Amiens Street, Dublin 1.

**Chairperson:** Joanne Henderson

**Attendees :** Joanne Henderson ( NISRA), Sarah McAuley (NISRA), Patrick O’Kane (NISRA), Paul J Crowley (CSO), Mairead Griffin (CSO), Patsy King (CSO), Bernie Morris (Failte Ireland), Caeman Wall (Failte Ireland), Peter Nash (Tourism Ireland), Olivia Mulhern (Tourism Ireland), Noel Sheahan (DTTAS), Alan Scarlett (DTTAS), Anne-Marie Montgomery (Tourism Northern Ireland), Pamela Wilson (Tourism Northern Ireland), Lorraine Fleming (DfE), Eoghan O’Mara Walsh (ITIC), Noel Sweeney (ITIC), Fiona Ure (Visit Belfast).

**Apologies:** Ken Spratt (DTTAS).

**1.       Welcome and introduction**

The chairperson welcomed members of the Liaison Group to the meeting.

**2.       Update from CSO (Mairead Griffin, Patsy King: CSO)**

****

**Update on CAPI (PCI)**

Central Statistics Office (CSO) informed the members that currently, the switch to CAPI for the PCI is behind schedule. This is due to the fact that a joint consultancy electronic data capture project was being undertaken with Consumer Prices, and initial priority had been given to that project. There will be a lot of additional testing required, due to the new sampling methodology, especially at Dublin Airport. CSO still aim to meet target deadline of going live Q3 2017; but it is possible that this target might not be met. If this is not possible, they asked would the members prefer a go live date of Q4 2017 or have a clean break commencing Q1 2018.

**Action**: It was agreed that CSO should dual run for as long as possible for comparison with the old methodology, and have CAPI in place with the new data available from Q1 2018, allowing a clean break in the series.

**Update on HTS**

CSO informed of a new grossing methodology for the HTS, which will now take into account gender, 7 age groups and 8 regions. CSO feel that this will not have a huge impact on outbound travel, but will have an impact on domestic travel data (as overnight trips to NI fall under outbound there will not be a big impact on these figures).

**Action**: It was agreed that CSO will revise the HTS quarterly from Q1 2012.

**3.       Update from DfE (Lorraine Fleming: DfE)**



Lorraine Fleming (Department for the Economy, Northern Ireland) updated the members on a new ten year strategy for tourism in Northern Ireland; there will be a new Programme for Government (PfG) under the new Government going out in the autumn and it will be the first time that tourism will be a big part of the economic strategy. The strategy will focus on expenditure with a target of £1bn tourism expenditure in NI by 2025. There will be two reviews in that period (with the new PfG in 2020/2021); plus year on year reviews with corporate/business planning; and again with the switch to the use of PCI data (in place of SOT data). Work will be done over the summer to see where DfE/industry will need to invest to achieve this target; and whilst Government enabled it must be industry led. The £1bn target will be broken out by separate GB, RoI and Other Overseas targets in the corporate/business plans of DfE, TNI and TI.

**4.       Update from NISRA (Joanne Henderson: NISRA)**



Joanne Henderson (NISRA) informed the members that Tourism Statistics Branch is going for National Statistics accreditation and due to delays this should hopefully be through by September; NISRA also released NI Air Passenger Flow Statistics for the first time. The Continuous Household Survey has had a change in that it no longer asks of an individual but of a household, to increase sample size. There has also been ongoing work on Daytrips. Tourism Ireland asked about the timeliness of data and NISRA informed that releases depend on when sources become available and allowing for quality assurance of data.

**5.       Day trips**

Tourism Northern Ireland asked about an NI day trips figure for 2015.

**Action:** NISRA will release an annual NI Figure for 2015. In time, it is hoped this will be broken out by Local Government District (LGD) and if this is possible it can be provided for previous years.

Tourism Ireland asked CSO if the HTS will move from a paper survey to electronic capture. CSO informed that they have asked for social surveys within CSO to take on the tourism element but as they are going through a transformation therefore it is unlikely in the short term.

CSO will have to have a decision by the end of the year as there is a Eurostat requirement for daytrips for 2018. Tourism NI asked if this will cover NI and CSO informed that Eurostat require domestic daytrips; and trips to NI fall under outbound same day visits. NISRA informed that this is something a lot of users have been asking for; CSO will collect domestic on HTS and will have to consider how it would be collected for outbound travel, but would not expect a great response rate. Tourism NI mentioned that this is a missing piece of their puzzle, and for a tourism satellite account they would require RoI daytrips to NI and the expenditure. Fáilte Ireland also said daytrips would be something they would really like to have; ITIC pointed out that reviews have mentioned a lack of domestic day trip visits.

**Action:** A requirement for information on Irish residents taking day trips across all Ireland (both domestic and to Northern Ireland) was noted. CSO will consider this, and will mention to social surveys section that so many users would like this data.

**6.       Research / Use of Data Fáilte Ireland (Bernie Morris: Fáilte Ireland)**

Bernie Morris (Fáilte Ireland) provided an overview in the seasonality of overseas visitors to the Republic of Ireland (RoI); and how RoI would like to encourage more visitors to come during off peak times. Bernie showed that in the UK tourism is more evenly spread over the year, but it does have the draw of a major world capital and its close proximity to Europe. Using the Gini coefficient, it was shown that over the long term visitors have been coming to RoI more throughout the year, evening out the spread and that Europe has shown the biggest improvement. However, this has been impacted by the recession in more recent years.

**7.       Research / Use of Data Tourism Ireland (Peter Nash, Olivia Mulhern: Tourism Ireland)**

Peter Nash (Tourism Ireland) expressed Tourism Ireland’s support for the changes CSO are making in the PCI but want their concerns understood that they would like the data from Q1 2018, and how transfers in Dublin Airport are being dealt with; also thanked CSO and NISRA saying how TI value and rely hugely on their data. Tourism Ireland are putting together their Corporate Plan for the next three years and will have specific targets set by both RoI and NI Governments.

Olivia Mulhern explained how they will focus on promotable (holiday and business) revenue and that the corporate plan will run from 2017-2019; which is good as it will run along with the break in the CSO data series. Olivia informed that it was good to have the NI targets set out by GB and Other in order to monitor these market segments. Olivia thanked CSO and NISRA for the data they provide.

**Action:** CSO to provide a note detailing methodology for transit passengers (for example those travelling through Dublin Airport but not visiting Ireland).

**8.       Research / Use of Data Tourism Northern Ireland (Pamela Wilson: Tourism Northern Ireland)**

Pamela Wilson (Tourism Northern Ireland) expressed data concern regarding the number of overnight trips by RoI residents to NI; and the need for daytrip figures to assist in forecasting and shaping policy. Tourism NI understand the timeliness of the data and appreciate that the PCI will be in place for Q1 2018 providing more robust data. Pamela asked if there is any possibility of an All Island Tourism Satellite Account. DfE have a rough plan in place but no dates etc and FI have no plan in place.

**9.       Update from DTTAS (Noel Sheahan: DTTAS)**

The Department of Transport, Tourism and Sport (DTTAS) informed that the new PfG commits to implementing the Tourism Policy Statement *(People, Place and Policy – Growing Tourism to 2025)* and to achieving the targets within it. A Tourism Leadership Group was formed in 2015 and has an agreed Action Plan for 2016-2018 (published January 2016). In accordance with one of the Actions in the Plan, some additional areas of research have been suggested to Fáilte Ireland as part of the Visitor Attitude Survey.

**10.   ITIC (Eoghan O’Mara Walsh, Noel Sweeney: ITIC)**

The Irish Tourism Industry Confederation (ITIC) are currently finalising a report reviewing tourism statistics in Ireland. It was said that a lot of people either don’t know or are unaware of the data or how to use it. Informed that the industry is interested in trends and emerging trends. CSO informed that their primary function was to produce the statistics and do not do any further additional repackaging. CSO noted that ITIC produces user friendly releases, presenting statistical data. ITIC also mentioned that the industry would also like projections; the view of Tourism Ireland (who work with Oxford Economics on this area) and Tourism NI is that tourism is very difficult to forecast as there are so many variables in play and it can be quickly altered by air access/ air lines, plane crash, media, terrorism etc. They feel while it can somewhat be done, it will not be accurate.

**11.   Any other business**

CSO made a reference to the joint release from CSO and NISRA regarding visitors to Ireland and Northern Ireland during 2014. It represented a concrete example of cooperation between the statistical agencies on both parts of the island. The exercise may be repeated again in a few years’ time.

Fáilte Ireland was thanked for their hospitality in hosting the meeting.

**12.   Date of next meeting**

The next meeting will be held in Dublin in June 2017 and will be organised by CSO.