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Sent via E-mail

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NORTHERN IRELAND TOURISM STATISTICS

Dear Ed

As you will be aware, one of the sources of data used in the production of NISRA's Northern Ireland Tourism Statistics is unavailable. The source in question is "The Household Travel Survey (HTS)" conducted by Central Statistics Office (CSO), which provides an estimate of overnight trips to Northern Ireland by visitors from the Republic of Ireland (ROI). In the most recent annual and quarterly publications, this estimate accounted for approximately 12% of all overnight trips and 11% of the overall tourism spend.

CSO has suspended the HTS due to underlying data quality issues (see Annex 1 for further detail), which they are currently in the process of addressing. It was expected that it would be summer 2020 before they would be in a position to determine if the matter has been satisfactorily resolved, thus facilitating the release of the information to NISRA. However, the COVID-19 global pandemic has meant that CSO surveys have been suspended which ultimately means that these indicative timings will be pushed back further. The impact of this is that NISRA is currently unable to produce and publish its National Statistics publications ([Northern Ireland annual tourism statistics](#)).

In view of this and as an interim measure, I propose to suspend the publication of the National Statistics until the ROI data become available and move to publish the tourism information that we have in appropriately tailored and caveated releases

(information relating to quarters 2 and 3 of 2019 will constitute the first release). These will focus on the place of origin of visitors (clearly differentiating each market), highlight the information that is missing and include appropriate data coverage and quality guidance for users. The information in the new format releases will account for the vast majority of overnight trips in NI and will include domestic tourism within NI, visitors from GB and visitors from overseas areas.

I consider that this approach is in the public interest and provides the best compromise until normal business can resume. While it has been discussed and agreed with key stakeholders including tourism policy leads, all of whom are content, I would welcome your views on this proposed way forward.

In addition to the above, the COVID-19 global pandemic will undoubtedly continue to cause major disruption to the tourism sector for the foreseeable future. In accordance with government guidance, I have taken the decision to temporarily suspend NISRA's face-to-face survey field operations resulting in the cessation of interviews conducted through the NI Passenger Survey. Clearly this will have a further impact on NISRA's NI Tourism Statistics, which will also need to be managed.

Yours sincerely,

A handwritten signature in black ink, appearing to read "Siobhan Carey". The signature is fluid and cursive, with a horizontal line underneath the name.

SIOBHAN CAREY, CBE

Registrar General for Northern Ireland & Chief Executive NISRA

Background

The Household Travel Survey (HTS) data, relating to overnight visitors from Republic of Ireland (ROI), is an essential part of NI tourism statistics and is needed to produce the headline estimates of overall trips, nights and spend. The HTS is a survey run by Central Statistics Office (CSO), Ireland.

Issue with the data

In August 2018, the HTS was suspended due to quality issues in the collected data. Against a backdrop of falling response rates, it was observed that there was a non-response issue affecting the survey estimates in 2018.

In order to address the non-response bias in the 2018 HTS sample, CSO adjusted the weights of respondents within the sample design for all quarters of 2018. NISRA has been labelling 2018 data as “interim data that may be subject to future revision” in recent publications.

In quarter 1 2019, CSO made changes to its questionnaire to address the issues and felt assured they had been resolved. However, when analysing the quarter 2 data in October 2019 the results still didn’t look plausible and the HTS was suspended.

([note on CSO website re suspension of HTS](#)).

CSO has changed the sampling methodology on the HTS from January 2020 which they hope will resolve the issue. However, they have indicated that it will be at least July 2020 before the impact of this is assessed and decisions around publication of results is made. Due to the COVID-19 global pandemic the HTS has since been suspended so this will push this date back.

Impact on NI Tourism Statistics

In 2018, ROI visitors made up approximately 12% of all trips and 11% of all spend in overnight trips to NI. The HTS is the only source of data on the numbers of ROI visitors who take an overnight trip to NI and therefore NISRA will not be able to publish a complete picture of overnight trips in NI.

Impact for Users of the Tourism Statistics

With no data available, users are facing a long wait for updated information on tourism. Following consultation with key users, the view is that the tourism industry,

the public and the media will have no access to information that would allow them to scrutinise tourism trends. This means that government departments (in particular the Department for Economy) and tourist boards (in particular Tourism Northern Ireland) will not have access to up-to-date information to inform policy and funding decisions.

The tourism statistics are also used to measure the draft Programme for Government as a proposed indicator. This indicator cannot be used until the full data are available.

NISRA has met with the policy team in the Department for Economy and the research team in Tourism Northern Ireland to discuss the issue and impact on publication of results. All key users are keen to get access to as much of the available information as quickly as possible, but are aware that the above solution will mean incomplete statistics on overnight tourism to Northern Ireland.

Affected Publications

NISRA's Tourism Statistics branch publish a number of different publications on tourism statistics over the year. The table below shows the impact of the suspension of HTS data on each of these publications.

Publication	Status of publication
<u>Northern Ireland Annual Tourism Statistics</u>	Main estimates affected by delay as RoI visitors are part of the overall total. The publication includes other estimates which will not be affected (Hotel accommodation, other accommodation, visitor attractions, cruise ships, tourism jobs) This publication will be suspended, however a new Official Statistics publication will provide as much detail from this as possible but clearly caveated to show that it does not include RoI visitors.
<u>Northern Ireland Quarterly Tourism Statistics</u> (3 publications covering quarters 1-3)	Main estimates affected by delay as RoI visitors are part of the overall total. The publication includes other estimates which will not be affected (Hotel accommodation, other accommodation, cruise ships) This publication will be suspended, however a new Official Statistics publication will provide as much detail from this as possible but will be clearly caveated to show that excludes RoI visitors. Currently 2 of these publications (quarters 1 and 3) are in tabular format with no report and it could be that all 3 will take this format
<u>External Overnight Trips to Northern Ireland</u>	This is affected as RoI visitors are a key part of the estimates for external visitors (In 2018, RoI visitors were worth 21% of overnight trips) This publication will be suspended
<u>Northern Ireland Domestic Tourism</u>	The estimates for this publication are unaffected. This publication will continue but will be clearly caveated to show that it has not been published without the other sources before.
<u>Northern Ireland Local Government</u>	These estimates are affected by the delay and cannot publish until the data is available or we have a better understanding of the

<u>District Tourism Statistics</u>	position as if the data becomes available it would be disclosive to add RoI visitors to incomplete estimates. This publication in its current format will be suspended. NISRA will explore publishing data excluding visitors from “other” countries (including RoI) to exclude the risk of misunderstanding. It will be clearly caveated and will include more user engagement before any publication is made available.
<u>Northern Ireland Annual Hotel Occupancy Survey</u>	These are unaffected. These will continue to publish as National Statistics
<u>Northern Ireland visitor attraction survey</u>	These official statistics will be unaffected and do not have National Statistics status. They will continue to be published as normal.
<u>Northern Ireland annual guesthouse, bed & breakfast and guest accommodation occupancy statistics</u>	These official statistics will be unaffected and do not have National Statistics status. They will continue to publish as normal.
<u>Self catering occupancy survey</u>	These official statistics will be unaffected and do not have National Statistics status. They will continue to publish as normal.