



Irish Tourist Industry
Confederation

Improving Tourism Data for **SUSTAINED GROWTH**

March 2017



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Executive Summary

Data is the raw material for better informed decisions

Tourism policy, strategy development, marketing implementation and evaluation require adequate, reliable and timely data generated by best practice of collection and research methodologies.

Organisations require quality data, in real-time or near-real-time, upon which to base their analytical and decision support systems. This is driven by the need for making informed business decisions faster than ever before, using better data, and more varied sources and types of data. At the business level the incidence of collecting and analysing data on demand, market profiles and financial performance has intensified in recent years. Advancements in I.T. systems have equipped operators with access to a range of new analytic tools. Most businesses now have immediate access to real time data on their operations.

Robust tourism-sector statistics are vital to guide sustainable development, monitor progress, evaluate impact, promote results-focused management, and highlight strategic issues for policy objectives.

Findings of this report, conducted on behalf of the Irish Tourist Industry Confederation (ITIC) by Tourism & Transport Consult International (TTC), identify that the volume of tourism data and statistics in Ireland is plentiful however, its timelines, presentation and interpretation leave room for improvement.

An overview of data sources on Ireland's tourism

The Central Statistics Office (CSO) has responsibility for the collection and production of national tourism statistics. The CSO conducts a number of sample surveys and publishes regular releases available online, together with a StatBank facility. Tourism data collected by the CSO includes:

- Overseas visitor arrivals by source market, their purpose of visit, expenditure, length of stay, and accommodation type used;
- Overnight trips within Ireland taken by Irish residents, including type of trip; length of stay, accommodation used and other characteristics;
- Monthly passenger movements on air services into and out of Ireland;
- Employment in 'Accommodation and Food Service Activities', collected quarterly and commonly used as a proxy for jobs in the tourism sector.

Fáilte Ireland - The National Tourism Development Authority collects survey data on visitor profiles, characteristics, and behaviour, together with customer evaluations of the tourism experience. The output provides more in-depth information on demand, while a number of surveys of industry and one-off research projects provide data on supply side performance.

Tourism Ireland monitors market segmentation and performance together with evaluation of effectiveness of overseas marketing campaigns. The output also includes commentary on market conditions and outlook.

The Northern Ireland Statistics & Research Agency (NISRA) provides estimates of overseas arrivals into the Republic via Northern Ireland gateways as well as estimates of visits to the Republic by Northern Ireland residents.

In addition to the above, air and sea ports collect monthly data on passenger traffic while many businesses and trade organisations conduct regular or occasional primary research. Commercial suppliers of data to the tourism sector include Crowe Horwath and STR Global producing annual and monthly data respectively on key metrics of Ireland's hotel industry.

The industry's need for data

While more or better data does not guarantee better decisions, better policy and business decisions nearly always start with better data. Up to date tourism intelligence, market insights and economic information are very important public goods for the private sector.

Consultation with industry leaders suggests three main uses of tourism macro data – national, regional and sectoral:

- Performance measurement – ‘how are we doing?’
- Advocacy – lobbying to ensure that policy and strategic decisions are well informed.
- Strategic and tactical by state agencies and businesses to ensure the most effective and efficient allocation of finite investment and marketing resources.

Challenges of capturing information on tourism

Tourism, principally defined as a demand driven activity rather than a discrete industry or business sector in national accounts, is difficult to measure. It is complex and fragmented as tourist consumption and expenditure is spread over a wide range of industry sectors – accommodation, transport, food and drink, retail, entertainment, cultural and sporting attractions, together with a range of other consumer services.

The economic rationale for tourism – providing jobs, incomes and profits – is difficult to assess and influence policy without a metric that is more than demand side survey estimates of visitor volumes and value. These estimates can at times provide a less than comprehensive or robust indicator as to how the sector, and businesses within the sector, is doing.

Fast changing business environment

Economic and geopolitical uncertainties, changes in demand patterns, new emerging markets and customer preferences, diversification of marketing channels, low cost travel, and the evolving sharing economy combined with the applications of communication technologies and e-commerce are radically changing international tourism. Ireland's tourism industry is specifically facing the challenge of intensified competition and cost pressures, challenges which have been exacerbated by Brexit. The result is added pressure to have a timely understanding of what is happening and why.

Key Findings

Rich body of tourism data

The overall consensus is that Ireland currently collects a rich body of demand side tourism statistics. The macro data collected by the CSO is highly valued as is the data on markets, customers, and products produced by Fáilte Ireland and Tourism Ireland. The body of tourism data collected over the years provides the industry with an excellent time series as a basis for analysis of performance and trends in overseas demand for travel to Ireland. The quality and range of tourism data collected exceeds that of many destinations including several direct competitors in Europe.

Robust methodology

The quality, relevance and integrity of Irish tourism statistics are extremely high, meeting Eurostat requirements and providing robust data. The sample for the CSO surveys of overseas visitors is judged to be generous. The planned introduction of computer assisted personal interviewing (CAPI) will allow more in depth interviews improving the quality and timeliness of information collected. All providers have shown a willingness to improve the coverage where possible to meet the needs of stakeholders.

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Sizeable investment by the State

While it is not possible to accurately compute the cost to the state of the data collection and research function in tourism, from observation it would suggest that the cumulative annual expenditure by the CSO, Fáilte Ireland and Tourism Ireland is sizeable, despite some cutbacks in recent years. Costs are a critical factor and while there is always pressure to improve on the range and depth of data further investment needs to be assessed against evidence of demand and cost effectiveness.

Opportunity to harvest greater value from the current body of tourism data

Despite the body of data and research undertaken the industry is less than well served in respect of access, interpretation, and communication of findings. Based on consultations and a selective review of best practice in comparator destinations, a number of areas have been identified which would improve the value to stakeholders of the investment in the collection and dissemination of tourism data. These have been identified to include:

- 'More timely data'; improve the timeliness of the release of data to more align it with business cycles;
- 'Insight factory'; needed to expand the analysis of data collected through skillful interrogation and interpretation;
- 'Tell the story'; by communicating a commentary of informed insights, ideally through a single authoritative source of analysis and interpretation;
- 'Open access'; to data through a suite of online platforms that enables the customisation of outputs for the range of stakeholders.

New exciting data collection opportunities

The changes being introduced by the CSO, mobile technologies and the emergence of a number of new data sources combine to present an exciting opportunity to present a more holistic picture of tourism performance and trends. The advancements also offer the opportunity for greater efficiencies and cost effectiveness of the state's function in data collection and information dissemination.

Innovation in data sources, including big data, the use of mobile positioning and administrative data, all combine to present an exciting landscape of tourism statistics in the near future. The new methodologies, including computer assisted interviewing and the increasing use of apps, offer the opportunity for significant improvements. Compared to existing statistical processes the opportunity exists to improve the timeliness, in some cases up to near real time, generate new indicators previously not available, provide calibration opportunities with existing data, and deliver improved accuracy. The application of new mixed mode data collection and the enhancement of survey methodologies could allow for a reduction in sample sizes of conventional surveys and possible integration of the existing port surveys.

'Gaps' & challenges

In the course of the review a number of other issues were raised which warrant consideration, including the following:

- Visitor expenditure estimates
The robustness of expenditure estimates, based on visitor recall at point of departure, was called into question. Several suggestions were made regarding alternative or supplementary methods of measuring expenditure, including the use of expenditure diaries by means of an app, supplemented by electronic transaction data.
- Ireland's competitiveness
While competitiveness of the Irish tourist offering is perhaps the most important variable in performance, there is scant data currently available to monitor Ireland's competitive positioning in its main source markets. Data and research has the potential to deliver a competitive advantage.

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- Forecasting & risk analysis

Annual forecasts tend to be limited to top line forecasts published annually. While forecasting is not an exact science, forecasts in recent years have been shown to be wide of the actual performance.

- Making the economic case for tourism

The consultations pointed to the need for more precise and rigorous information about the economic significance of tourism, at national and regional levels. This gap was seen as a handicap to justifying public sector investment in the sector and to developing effective policies. A Tourism Satellite Account (TSA) internationally considered as a reliable tool to gauge the economic weight of tourism within an economy and to comparing tourism to other industries, was proposed by some respondents as highly desirable.

- The challenge of securing interviews

As almost all tourism data is derived from surveys it is totally dependent on securing effective interviews from tourists and industry operators. Modern day travel pressures and lifestyles are limiting the opportunities and present a formidable challenge, while industry response rates suffer from pressures of business and survey fatigue. The adoption of new methodologies for collecting information will be necessary to address this issue.

- A single voice

In any jurisdiction, there will likely be a range of producers and disseminators of tourism statistics. Currently in Ireland tourism data tends to be the subject of multiple publications of top line statistics, largely in the form of press releases without any substantial interpretation. Leveraging a definite advantage from data and research outputs is perhaps best achieved through a single authoritative source which takes data from a range of sources, digests the information, and adopts a proactive stance towards sharing its interpretation of what the holistic 'tourism story' is.

Lessons from other destinations

New Zealand and Britain are amongst those destinations currently viewed as 'best in class' with regard to the collection, analysis, interpretation, and communication of tourism data and research insights. Other destinations include Canada, Australia and Germany. The review identified from a user's perspective a number of current best practices and lessons which might usefully be considered in how best to present and share data with stakeholders.

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Top line recommendations

Recommendation	Projected Outcome/Benefit	Delivery responsibility	Timescale
<p>1. Continue to adopt best practice methodologies and modern technologies to generate reliable, usable, practical information to meet the needs of the range of stakeholders</p> <ul style="list-style-type: none"> • Exploit computer assisted and online interviewing. • Explore use of mobile technologies. 	<ul style="list-style-type: none"> ▪ Improvement in speed and accuracy of data collection. ▪ Expansion of information collected ▪ Possible realignment of exit surveys to produce efficiencies ▪ Potential to deliver greater and more timely insights 	CSO & Fáilte Ireland	Ongoing
<p>2. Improve the timeliness of data outputs</p> <ul style="list-style-type: none"> • Monthly CSO estimates of volume, value and purpose of visit data by key source markets. • Reduce the lag time on delivery of Survey of Travellers and other annual survey results from Fáilte Ireland. 	<ul style="list-style-type: none"> ▪ More timely access to performance metrics comparable to best practice in other destinations ▪ Potential benefits in informing business decisions 	CSO Fáilte Ireland	2018
<p>3. Dial-up the interpretation function and delivery of insights from surveys and research outputs</p> <ul style="list-style-type: none"> • Establish a single online source for Irish tourism data and statistics, a collaborative website (e.g. www.irishtourismdata.ie) that can be updated regularly with all interpretation and communication of relevant Irish tourism research and statistics. • Identify resources and skills necessary to deliver an upgraded programme of analysis, interpretation and communication of available data outputs. • Redesign Fáilte Ireland's online presentation and content of data to include interrogation function. • Ensure better efficiencies and avoid duplication across tourism state agency research functions. 	<ul style="list-style-type: none"> ▪ One-stop shop for authoritative 'translator' of data and research results, commentary and insights ▪ Extracting more value from data collected ▪ Greater efficiency with elimination of duplication of interpretation and communication by more than one agency ▪ Builds functional expertise ▪ Improved access to data and research reports together with providing users with ability to customise the information 	Dept. of Transport, Tourism & Sport Fáilte Ireland Tourism Ireland	2017/18
<p>4. Establish a Research Forum - to include state agencies, academics, and representatives of tourism and allied businesses.</p> <ul style="list-style-type: none"> • Conduct a 'fit for purpose' and efficiency review of existing programme of surveys and research outputs. • Develop and publish a 5-year domain plan for tourism statistics and research. • Establish a working group to engage with mobile and Big Data providers – mobile telecom operators, banks, credit card companies, etc. • Revisit feasibility of a national Tourism Satellite Account. 	<ul style="list-style-type: none"> ▪ An industrywide interface between data providers and users to ensure the relevance and value of data collected ▪ Greater transparency ▪ Access to a wider community of knowledge and expertise ▪ Engagement with current academic perspectives on the collection of tourism statistics ▪ Opportunities for gathering more insights into tourist demand and behaviour patterns to complement traditional data sources ▪ TSA - a robust economic analysis of the impacts and contribution from tourism. 	Dept. of Transport, Tourism & Sport + Forum members	2017
<p>5. Work to improve industry participation rate in surveys & lobby for adequate resources allocated to research, including co-funding models</p>	<ul style="list-style-type: none"> ▪ Improvement in quality of data collected from industry ▪ Increase in resources 	ITIC	Ongoing

1. Introduction

1.1 Background

Tourism policy and strategy development, marketing implementation and evaluation require adequate, reliable and timely data. The effective and efficient management of tourism is dependent on performance and strategic marketing data generated by best practice of collection and research methodologies.

In the context of achieving sustainable growth for the sector ITIC undertook a review of current tourism data collection and research framework. Since the previous review in 2011 circumstances have changed, not least a return to rapid growth in Ireland's tourism. Over the intervening period there have been significant shifts in market demand trends reflecting changing consumer preferences and revolutionary shifts in communication and booking channels. The pace of change has accelerated posing challenges for product and service providers, destination and business marketers, and data and research suppliers.

1.2 Purpose

The purpose of the review was not to carry out an in-depth technical quality review of tourism data in Ireland but rather to look at tourism data from a user's perspective. Therefore, the conclusions are focused on how best to ensure Ireland's tourism industry has a modern system of statistics to deliver reliable and timely insights and market intelligence in order to improve the quality of decisions at policy and business levels.

1.3 Objectives

The objectives set out for the review included:

- Assess the current body of tourism data – sources, reliability, timeliness, appropriateness, usefulness, interpretation and accessibility.
- Identify any data/research deficiencies at national and sub-national levels.
- Review current methodologies to identify any shortcomings and possible improvements.
- Specify the ideal level and frequency of data to best inform business decisions.
- Identify best practice from selected comparator destinations.
- Propose changes for consideration in the provision of statistics of adequate quality to meet users' needs.

[Terms of Reference are included as Appendix A]

1.4 Approach

TTC – Tourism & Transport Consult, appointed by ITIC, conducted the review by means of desk research and a series of consultations with the data collection and statistical producing agencies together with a number of industry stakeholders from across sectors of the industry. TTC also attended the most recent meeting of the All Island Tourism Statistics Liaison Group. In addition, TTC engaged the services of an international practitioner in the field to critique Ireland's current tourism statistical framework and to provide comparators of best international practice.

The review engaged with a range of tourism data sources and outputs, including:

- The Central Statistics Office (CSO);
- Fáilte Ireland;

- Northern Ireland Statistical Research Agency(NISRA);
- Tourism Ireland;
- Tourism Northern Ireland;
- Air and sea carriers & ports;
- Trade associations and commercial sources.

[A list of organisations consulted is attached as Appendix B]

1.5 Acknowledgements

TTC is indebted to organisations and individuals who gave willingly of their time and insights to inform the review. Special thanks are due to the primary data producers – CSO, Fáilte Ireland and Tourism Ireland - for their co-operation, guidance and patience in engaging in the process including responding to queries and elaborating on methodologies.

2. Why data is important – the context

2.1 Data is the raw material for better informed decisions

Organisations require quality data, in real-time or near-real-time, upon which to base their analytical and decision support systems. This is driven by the need for making informed business decisions faster than ever before, using better data, and more varied sources and types of data.

Businesses in tourism have ready access to more and more data on their customers and in-house performance metrics facilitated in large part by advances in information technology. Typically, businesses can monitor performance against a defined set of metrics almost on a daily basis. This recourse to immediate, and in many instances real time, data is an essential management tool for successful enterprises.

Data on tourism at a national, regional and sectoral level is essential in providing a context for individual businesses. Such data provides a valuable resource for businesses in planning and operating, as well as identifying market opportunities, predicting upturns and downturns and gaining a better understanding of what visitors want.

Consultation with industry leaders and users of tourism data suggests three main uses of national, regional and sectoral tourism:

- Performance measurement – ‘how are we doing?’
- Advocacy – lobbying to ensure that policy and strategic decisions are well informed. Timely macro-economic data on tourism’s importance and performance is a critical component as is contemporary information on current demand and supply metrics.
- Strategic and tactical business decision making – informing decisions by state agencies and businesses to ensure the most effective and efficient allocation of investment and marketing resources.

2.2 UNWTO calls for more and better tourism data

The system of statistics for tourism is relatively young compared to many other economic areas. There has been rapid development over the past 20 years with guidance and direction from the UN-World Tourism Organisation (UNWTO); the Organisation for Economic Development & Cooperation (OECD); the European Union (EU); and the International Labour Organisation (ILO).

The UNWTO called for improved investment and co-ordination in data collection in the tourism sector. Under the theme “Better Data, Better Lives,” the UNWTO is campaigning to raise awareness of how official statistics help decision makers develop informed policies that impact millions of people. Improved data sources, sound research methods, new technologies and strengthened statistical systems enable better decisions and better lives for all.

“Robust tourism statistics are vital to guide sustainable development, monitor progress, evaluate impact, promote results-focused management, and highlight strategic issues for policy objectives. UNWTO calls upon national governments to work towards building internationally comparable and reliable tourism statistics, including Tourism Satellite Accounts (TSA).” UNWTO Secretary-General, Taleb Rifai, Press statement, October 20, 2015.

In its guidance on the development of tourism statistics, UNWTO recently launched the following tools:

- *International Recommendations for Tourism Statistics 2008 Compilation Guide*, in co-operation with United Nations Statistics Division (UNSD);

- *Measuring Employment in the Tourism Industries - Guide with Best Practices*, in co-operation with the International Labour Organization (ILO);
- *The Use of Statistics to Evaluate Tourism Policy*.

2.3 Ireland's Tourism Policy

People, Place and Policy – Growing Tourism to 2025, the Government's policy statement, published in March 2015, sets out three headline targets:

- €5 billion revenue per year from overseas tourism, excluding carrier receipts and net of inflation;
- 10 million overseas visits to Ireland; and
- 250,000 people employed in tourism.

The policy statement contained 51 policy objectives that the Government wished to see implemented in order to achieve the goals. Included were a number of specific statements pertinent to any discussion of tourism data:

'Tourism Ireland's marketing of Ireland as a visitor destination will be evidence based and targeted at a range of geographical and segmental markets with the highest revenue growth potential, and the evidence for these decisions will be shared with industry partners.' (Ref.1.1.1)

'The State's investment in overseas destination marketing will be externally evaluated on a regular basis.' (Ref. 1.1.3)

'The competitiveness of Irish tourism is dependent on both price issues and value. The Department will monitor price trends in tourism, and the Government will take account of such trends in its supports of relevance to tourism particularly the reduced VAT rate for tourism services.' (Ref. 2.2.2)

'The Department of Transport, Tourism and Sport will, with the CSO, tourism agencies and third level institutions, establish a forum to identify key areas and ways in which additional sources of data can be harnessed to provide enhanced understanding of tourism performance and its economic contribution, including the possibility of developing a Tourism Satellite Account for Ireland.' (Ref. 2.2.3)

A Tourism Leadership Group, appointed by the Minister of the day to convert the longer-term policy objectives into specific actions, published its Tourism Action Plan for the period 2016-2018. The Plan's 23 actions address a range of key issues, including the marketing of Ireland as a visitor destination overseas, visitor access to and within Ireland, the effective presentation of Irish culture, sport, and events to visitors, the role of Local Authorities in supporting tourism, visitor accommodation capacity, and skills development in the tourism sector. A specific action in respect of tourism data is stated for action by Fáilte Ireland and the Department of Transport, Tourism & Sport:

'The Fáilte Ireland Visitor Attitudes Survey will be updated to reflect the wider range of factors influencing visitor satisfaction. The findings of this research will inform future public investment decisions.' (Ref. No. 23 Tourism Action Plan)

2.4 Tourism Research Forum

The Government's policy statement recognises the need for high quality statistical information and academic research. The Department of Transport, Tourism & Sport announced its intention of establishing a forum to identify key areas, and ways in which additional sources of data can be harnessed to provide enhanced understanding of tourism performance and its economic contribution. It is proposed that the CSO, tourism agencies, universities and institutes of technology would

contribute to the forum. It is surprising that the proposal does not appear to include businesses which have invested in the sector, an omission which would surely limit the scope of the proposed forum as well as failing to represent a large sector of the user community. Industry stakeholders should be included in any Tourism Research Forum.

2.5 Challenges of capturing information on diverse industry

Tourism, principally a demand driven activity rather than a discrete industry or business sector, is difficult to measure – it is complex and fragmented. Tourism is horizontal across various sectors of the economy. As such tourism is not a defined category within the national accounts, as say agriculture or manufacturing. Tourist consumption or demand and expenditure is spread over a number of business sectors – accommodation, transport, food and drink, retail, entertainment, cultural and sporting attractions, together with a range of other consumer services.

The economic rationale for tourism – providing jobs, incomes and profits – is difficult to assess and influence policy without a metric that is more than demand side estimates, i.e. visitor numbers and expenditure that are gathered largely by sample surveys. The latter provide a less than comprehensive or robust indicator as to how the sector, and businesses within the sector, is doing.

However, a different approach can provide a more robust economic metric to complement demand side data. This is based on existing data already collected at national level and capable of regional/sub-national and sector disaggregation – i.e. labour statistics; business statistics; and other administrative and public service data. The latter would include tax returns, employment statistics, etc. The approach complements the thinking behind Tourism Satellite Account (TSA), and is capable of providing economic, business and social indicators to allow comparisons between tourism and other economic sectors.

By mining the business data already collected – from the registers and administrative databases of enterprises and people - it is possible by applying some variables as to the relative importance of tourism to the business enterprise to arrive at a supply side measure of tourism.

2.6 Fast changing business environment

Changes in demand, new emerging markets, new niche segments, innovations in marketing channels, low cost travel, and the evolving sharing economy, combined with the applications of communication technologies and e-commerce, have combined to radically change international tourism in recent years. All these changes add to the pressure to have a timely understanding of what is happening and why.

3. An overview of Ireland's Tourism Statistics

3.1 CSO data

The Central Statistics Office (CSO) has responsibility for the collection and production of national tourism statistics, following international definitions and methodologies based on EU directives and in compliance with Eurostat requirements¹. The output primarily provides macro metrics of overseas and domestic visitor volumes and value. Raw data has been supplied to Eurostat since 2012, which in turn publishes some data on Ireland's tourism not previously published. CSO data is highly valued by stakeholders as it provides essential demand-side information at a national level. The compilation and release of the data is impartial and objective.

3.1.1 Overseas travel

The CSO conducts two sample surveys of passengers at airports and seaports:

- *Country of Residence Survey (CRS)* and
- *Passenger Card Inquiry (PCI)*.

Data from these surveys are used in conjunction with passenger movement figures supplied by the air and sea transport companies to provide the estimates for overseas tourism and travel as published in the following regular releases from the CSO:

- *Overseas Travel (rolling 3-month data, available monthly)*
- *Tourism and Travel Quarterly (trips by overseas visitors and Irish residents by purpose)*

Data compiled by the CSO from the above travel surveys excludes travel by residents of Northern Ireland into or out of Ireland and travel by overseas visitors entering or leaving the Republic via a Northern Ireland port.

CSO	Key tourism data outputs	Methodology
Overseas Travel (monthly) Released monthly within 28 days	Primary source of data on volume of visitor arrivals, published as rolling 3 months' data. Number of arrivals by top source markets, incl. day trips. Published online: Set of 7 tables (Pdf & Excel) (11 source markets categorised for rolling 3-month data).	Country of Residence Survey (CRS), is a continuous sample survey of passengers (both inward and outward) which provides an estimated country of residence breakdown for passengers entering and leaving Ireland. This survey is conducted by CSO interviewers at Dublin, Cork, Shannon, Knock and Kerry airports and Rosslare, Ringaskiddy and Dublin seaports. Surveys are also conducted on behalf of the CSO at Holyhead Port by the UK's Office of National Statistics. A sample of flights and sailings is selected to facilitate proper representation of airport/seaport pairings, day, night, week day and weekend flights/sailings. On the selected flights/sailings for the CRS, a 1 in 5 (20%) systematic sample of passengers is selected and their country of residence is recorded. Sample results are grossed to total passenger numbers travelling for each airport or seaport pairing, as provided by the airports and ferry companies. The effective sample size for the CRS in 2015 was 439,600.

¹ Council Directive 95/57/EC of 23 November 1995 concerning the collection of statistical information in the field of tourism for data to the end of 2011 and Regulation (EU) No 692/2011 of the European Parliament and of the Council of 6 July 2011 concerning European statistics on tourism and repealing Council Directive 95/57/EC in respect of data from the beginning of 2012.

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Tourism and Travel Quarter	Primary source of data on profile of overseas visitors: <ul style="list-style-type: none">Country of residenceReason for journeyAverage length of stay (nights)Expenditure estimates, incl. fares paid to Irish carriersAccommodation used	This release is based on the results of the Passenger Card Inquiry (PCI) surveys at Dublin, Cork, Shannon and Knock airports and at Rosslare, Ringaskiddy and Dublin seaports. The survey data is collected by CSO interviewers. This data is also collected by the Office of National Statistics (UK) staff on behalf of the CSO at Holyhead seaport. The results are combined with the overall residency estimates from the Country of Residence Survey to provide the overseas tourism and travel details. The effective sample size for the PCI in 2015 was 167,000. In 2004 the sample was 482,000 and in 2009 238,000. The PCI has been conducted by the CSO since before 1976 and supplements the CRS by obtaining data on expenditure, purpose of journey, length of stay and type of accommodation used for passengers entering or leaving the Republic of Ireland via air and sea ports.
4 per annum Typically, within 10/12 weeks after end of period	Published online: Set of 7 main tables (Pdf & Excel) on inbound travel + StatBank data series 2012 to date (20 source markets categorised Quarterly and Annual tables)	

In addition to the published releases, the CSO does respond to requests for additional information where the data sample supports the output.

Major changes ahead

Both the CRS and PCI Surveys are carried out using the Person Assisted Paper Interviewing (PAPI) method undertaken by CSO enumerators at the key airports and ports. Under consideration for some time has been a move to Computer Assisted Personal Interviewing (CAPI) which is becoming the norm in many major interviewing scenarios. It had been hoped that the CAPI system would go live for Quarter 3 2017 but it is now more likely to happen in Q4 2017 or Q1 2018.

For CAPI a new sampling methodology has been developed – notably taking effect in Dublin Airport to reflect concerns over early and late flight capture and increasing numbers of transit passengers. Considerable testing is necessary for the new approach and potential issues that may arise from it.

More interviewers are being recruited to facilitate the changed system. CAPI will allow a somewhat longer questionnaire which could allow Tourism Ireland, for example, to add some questions regarding bednights and expenditure in Northern Ireland. The total sample for CRS is likely to fall but expenditure data is expected to become more accurate.

There may be a need to have a break in the time series visitor data when CAPI is introduced but the exact impact will not be known until the changes take place after testing and comparison of results from both systems. After the successful introduction of the CAPI system CSO may be able to share more data on a wider basis.

Use of mobile data

The Central Statistics Office has sought a change in EU law to allow it to use roaming data from mobile phones to help compile tourism statistics. In a submission to the European Commission, the CSO indicates it would like to see legal definitions broadened so people would not have to give consent to the use of their location data for statistical purposes. Such data would “not only be valuable for the compilation of tourism statistics” but has also been identified as having “significant potential value” in relation to compiling data on other migration patterns, such as day time, night time, weekday and weekend movements of the population. The submission outlines the CSO’s views on the so-called e-privacy directive of 2002, which is under review. It says there is uncertainty in national law about its entitlement to collect and use

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roaming data. A number of EU countries have started to collect mobile data for tourism purposes, including Slovenia, Belgium, Austria and Greenland.

3.1.2 Domestic travel

The primary source of data on Ireland's domestic travel comes from the quarterly Household Travel Survey (HTS) which has been running since 2001. The HTS only includes travel where there is at least one overnight stay thus excluding day trips. The HTS also includes travel to Northern Ireland.

A discontinuity in all of the series relating to outbound and domestic travel has occurred from 2010 onwards and therefore these results are not directly comparable with the results prior to 2010. This was because the recall period for trips was reduced from 3 months to 1 month to improve accuracy of recall.

HTS is to have another change in that it currently records age only as over or under 18. Age groups will now be added.

The HTS will not be moving online as this has proved problematic with other CSO Surveys. CSO is willing to investigate regional breakdowns in the future if there is a proven demand.

CSO	Key tourism data outputs	Methodology
Household Travel Survey (HTS) Quarterly 4 per annum Typically up to 14/15 weeks after end of period	Primary source of data on domestic (overnight) travel: <ul style="list-style-type: none"> • Purpose of trip • Length of trip; • Type of holiday; • Accommodation used; • Transport used; & • Booking method. Published online: Set of 4 main tables on domestic travel (Pdf & Excel) + StatBank data series 2012 to date.	The purpose of the Household Travel Survey (HTS) is to measure domestic and outbound travel patterns involving overnight stays and associated details (expenditure, purpose of trip, type of accommodation used etc.) of Irish residents. Each month information is collected by postal survey of over 4,600 households (or approximately 0.3% of all private households) randomly selected from the 2011 Electoral Register, where the selection is stratified by District Electoral Division. Survey household numbers for domestic travel are weighted to agree with household population estimates broken down by <i>household type</i> (the number of persons aged 18 or over) and <i>region</i> (NUTS 3), provided by the Quarterly National Household Survey (QNHS). These weightings are then applied to survey results. The compilation of the HTS has undergone a number of methodological changes for data from 2010 onwards.

3.1.3 Day trips

To comply with the Eurostat directive CSO will add day trips to the HTS for 2018. Appropriate questions will be added to the questionnaire although these will be limited and detailed enough only to comply with the directive. The data will reflect whether travel was on business or personal and record expenditure. Day trips to Northern Ireland will not be covered nor any regional data or detailed purpose of trip.

3.1.4 Aviation statistics

Monthly passenger movements on air services into and out of Ireland are available online from the CSO. The data is categorised by Irish airport, direction of travel, and foreign airport. This provides useful total passenger monthly movements on 'city-pair' routes from the 5 main Irish airports. The data is usually available within 2 to 3 months of month end.

The CSO also publish an annual release on aviation providing summaries of the number of passengers, the number of flights classified by arrivals and departures, and by reference to national and international traffic; and covers both scheduled and non-scheduled flights.

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Aviation statistics are compiled from data supplied by all Irish airports to the Central Statistics Office. Data for the five main airports (Dublin, Cork, Shannon, Kerry, and Knock) is supplied on a monthly basis, with data for regional airports (Waterford, Connemara, Donegal and Inishmore) supplied annually. The release published by the CSO also highlights the top routes for each of the five main airports. The data is collected under Statutory Instrument (S.I.) No. 91 of 2014 - Statistics (carriage of passengers, freight and mail by air) Order 2013. This is not a Eurostat requirement.

3.1.5 Employment

Tourism cannot be exclusively detailed as a sector in employment statistics as is the case in most countries. Instead ‘Accommodation and Food Service Activities’, collected quarterly by the National Household Survey (QNHS) is commonly used as a proxy for the tourism sector. However, it is noted that this estimate includes employment in all restaurants, cafes, fast food outlets and catering operations in the country many of which cater almost exclusively to local demand and does not measure those catering to tourists employed in other sectors such as entertainment, transport, retail, and other services.

The CSO data in addition to providing estimates for the Accommodation and Food Services sector as a whole can also provide disaggregated employment estimates by two digit NACE Rev 2, i.e. for 55 Accommodation and 56 Food and beverage service activities. This can be done subject to individual cell sizes meeting reliability thresholds while not in a position to tabulate 2 digit NACE results against any other variables.

The CSO Labour Market Analysis Section can provide one off analyses – for example by region – if there is no issue of reliability thresholds being breached (some regions do not have adequate numbers of returns to allow analysis).

Concern was expressed in the tourism industry that the data from 2015 by Quarter did not appear to reflect the growth in employment that the industry saw taking place. The CSO data shows that after little or no employment growth in the Accommodation and Food Services sector for a couple of years up to the middle of 2013 the QNHS measured annual growth in the sector for each quarter from the middle of 2013 and into 2014. While that level of employment growth did not continue into 2015 the levels of employment were maintained at the 2014 levels and annual growth in employment was observed again for Q4 2015 and Q1-2 2016. The Dublin and South East region didn't show growth in the first half of 2015 but rather most of the annual growth in employment to Q4 2015 can be attributed to those two regions. The Border and South West regions were the regions which showed annual growth in employment in the sector in the year to Q1 2015 and Q2 2015.

3.2 Fáilte Ireland

The National Tourism Development Authority – Fáilte Ireland – collects data on visitor profiles, characteristics, and behaviour, together with customer evaluations of the tourism experiences and performance data on industry sectors. The output from Fáilte Ireland provides a more in-depth analysis of international visitor profiles and behaviour derived from the continuous Survey of Travellers (SOT). In addition, a number of other surveys are conducted by Fáilte Ireland, including Visitor Attitude Survey (annual) and Accommodation Occupancy Survey (monthly).

Fáilte Ireland	Key tourism data outputs	Methodology
Survey of Travellers (SOT)	Provides detailed information on visitor and holidaymaker profiles and behaviour including: <ul style="list-style-type: none">• Route of entry and seasonality• Reason for visit/main & secondary• What they do/visit/participate in;	Ongoing sample survey at ports of departure by personal interviews. Face to face interviews are carried out with overseas visitors who have spent at least one night on the island of Ireland. The interviews are carried out with departing passengers at the three main airports (Dublin, Cork and Shannon) and at

	<ul style="list-style-type: none"> • Locations overnigheted; • Type of holiday; • Type of business trip; • Accommodation used; • Expenditure by category; • Segmentation; • Age, sex, social class, party composition & size. <p>Summary data published annually: Tourism Facts.</p> <p>Lag time 7 to 8 months from end of year (depending on publication of NISRA data).</p> <p>Other publications based on the SOT include:</p> <ul style="list-style-type: none"> • Regional Tourism Performance • Overseas visitors participation in activities (cultural and active) • Market trends 	<p>the four seaports in the Republic. Routes are disproportionately random sampled to ensure an adequate representation of all major source markets, which effectively means Great Britain routes are under-sampled and mainland Europe routes over-sampled to provide large enough sample sizes for detailed analysis.</p> <p>Until 2011 the total sample size has been 10,000 per year. It was reduced to around 7,000 due to budget cuts, but is now expected to have returned to 10,000.</p> <p>The sample results are weighted by month, by route, and by country of residence using the CRS data (from CSO).</p>
Visitor Post Visit Attitude Survey	<p>Gathers information on holiday visitors'</p> <ul style="list-style-type: none"> • motivations; • perceptions; • sources of information; • factors in choosing Ireland; • experiences vs. expectations; • satisfaction levels; • rating of aspects of holiday; • value for money rating; • interest in returning. <p>Published April/May following year.</p>	<p>Interviews with overseas holidaymakers at major ports June-October, using HAPI (Hand Held Personal Interviewing). Quotas were set to ensure that the sample represents the main markets namely, British, Mainland Europe and Transatlantic holidaymakers</p> <p>The achieved sample in 2015 was 1,987 interviews.</p>
Tourism Barometer	<p>Tracking of industry sentiment – indicators as to the perception of performance for the year to date and prospects for the remainder of the year/for the following year.</p> <p>Published online</p>	<p>3 to 4 times per annum</p> <p>Online survey</p> <p>May '16: 530 responses, with 150 top-up phone interviews.</p>
Accommodation Occupancy Survey	<p>Survey of accommodation providers providing information on:</p> <ul style="list-style-type: none"> • Stock and profile by grade (hotels) and region; • Guest night sales by overseas vs domestic; • Bed & room utilisation rates; • Demand seasonality profile. <p>Published online monthly for participants and annually</p>	<p>Online survey using specialist software which gathers data and allows participants to benchmark results online against the average for the sector and region each month, and, in the case of hotels, grade.</p>
Visitor Attractions	<p>Survey of visitor attractions providing information on attendances at visitor attractions analysed by</p> <ul style="list-style-type: none"> • Free vs fee-charging • County 	<p>B2B postal survey of visitor attractions in Ireland gathering information on visitor attendances.</p>

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	<ul style="list-style-type: none"> • Region <p>Published online annually in June/July and also listed in Tourism Facts.</p>	
Domestic Omnibus	<p>A survey undertaken to enrich CSO data on domestic holidaymakers, includes information on:</p> <ul style="list-style-type: none"> • Domestic trips/holidays in last quarter • Holiday intention • Holiday behaviour, e.g., booking, activities • Satisfaction <p>Published online 6-8 months after year end.</p>	<p>Questions purchased in an omnibus survey,</p> <ul style="list-style-type: none"> • 1,000 phone respondents • 4 times per annum

Fáilte Ireland publishes annual data and briefing reports, for example, Coach Tourism to Ireland and Domestic Tourism Performance.

In addition to the above annual outputs, Fáilte Ireland undertakes one-off and ad hoc data collection and research projects. Recent examples include: *Analysis of Visitor Accommodation in Dublin 2015-2020*.

Fáilte Ireland's segmentation research is communicated online through the Global and Domestic Sales pages of www.failteireland.ie.

In addition to the regular outputs Fáilte Ireland can provide, on request, customised data tables from its surveys.

3.3 Tourism Ireland

Tourism Ireland monitors market segmentation and performance together with evaluation of effectiveness of overseas marketing campaigns.

Tourism Ireland	Key tourism data outputs	Methodology
Visitors Facts & Figures	<p>Provides an overview of tourism to the island of Ireland</p> <ul style="list-style-type: none"> • Number of tourists from specific markets; • Profiles of visitors; • Where they visit; • Accommodation used; • Expenditure by category; • Age, sex, social class, party composition & size. <p>Summary data published annually.</p> <p>Lag time 8 to 9 months (maybe 5 to 7 months from end of year but 2 months from provision of Q4 NI data from NISRA) from end of year.</p>	<p>Compilation of data from primary sources CSO; NISRA; SOT and NIPS to provide an all-island aggregate of overseas visitor number and expenditure.</p>
Global Travel Insights	<p>Provides data on Ireland brand metrics including path-to-purchase, imagery and advertising recall together with awareness information on key competitors.</p>	<p>Annual poll of 1,000 consumers in each main market – GB; USA; France & Germany - on their spontaneous recall of advertising for tourist destinations.</p>
Situation and Outlook Analysis Report (SOAR)	<p>Captures current available data regarding market environment performance and outlook from a</p>	<p>Compilation of data from attractions, ports, economic commentators, market offices; industry partners.</p>

	range of industry partners at home and overseas. Published online nine times yearly to correlate with TI board meetings.	
Market Reviews	Ongoing series of assessment of competitive positioning of Ireland in marketplace to ensure overseas opportunities are maximised for inbound tourism and industry partners. The reviews of major markets are usually on 3 to 5-year cycle setting performance targets. Summaries published.	In-depth data analysis of market conditions, coupled with outlook for economic and other demand factors. The reviews critically assess Ireland awareness, share of voice, product offering appeals, access and as well as the destination's positioning in distribution channels. The review set out a marketing strategy and action programme.

A series of Market Profiles are also available on Tourism Ireland's website.

3.4 Northern Ireland Statistics and Research Agency (NISRA)

The Northern Ireland Statistics & Research Agency (NISRA) took over responsibility for Northern Ireland tourism statistics in 2011 under the direction of the new Department for the Economy. Previously the Northern Ireland Tourist Board (NITB) had undertaken this work.

Currently the NISRA tourism statistics are known as Official Statistics. They are currently under inspection from the UK Statistics Authority and if successful the Northern Ireland tourism statistics will be known as National rather than Official statistics.

Northern Ireland tourism statistics are extracted from several key surveys – which are enhanced by data from the Republic of Ireland (ROI) – and in turn data is provided to the CSO and Fáilte Ireland to complete the all-Ireland and ROI picture. Apart from cross border day tripping and holidaying by Northern Ireland and ROI residents – the vital data needed comes from visitors to Northern Ireland or Ireland who enter or leave through air and sea ports in the other jurisdiction. The timing of the provision of this data by either side can speed up or delay final tourism statistics provision.

NISRA conducts the following surveys:

- Northern Ireland Passenger Survey – 55,200 interviewed randomly at air and sea ports;
- Tourism Module – Continuous Household Survey – 3,349 face to face interviews in 2014/5;
- Occupancy Surveys for hotels and other accommodation;
- Visitor Attraction Survey - numbers visiting tourism attractions each year;
- Cruise Ships & Passengers – published annually.

The key data for NISRA from ROI comes from the CSO's Household Travel Survey and from Fáilte Ireland's Survey of Travellers. NISRA publishes annually the dates on which each of its survey outputs will be published and adheres to these dates. Its quarterly reports are published 16 weeks after the end of the relevant quarter – this is considered the earliest practical date when all elements of input (including those from ROI) can be combined to provide accurate output. The annual tourism statistics are published in mid-May following the relevant year.

Full details of surveys and outputs are available online, including sampling error, sampling framework, strengths and potential weaknesses plus potential changes/improvements.

NISRA, the Department for the Economy, and Tourism Northern Ireland collaborate with agencies in the Republic and meet regularly under the auspices of the All Island Tourism Statistics Liaison Group. The shape and relevance of this collaboration in the context of Brexit remains to be seen.

3.5 Other relevant data sources

Air and sea ports provide monthly data on passenger traffic to the CSO and Fáilte Ireland.

While many businesses and trade organisations within the tourism sector conduct regular or occasional primary research for proprietary use, a number of surveys are regularly used to report on performance and advocate on behalf of the sector. These latter include the following outputs:

State airports

The airport authorities, daa and Shannon Group, typically carry out continuous passenger surveys, primarily to estimate the composition of traffic by origin and destination, in addition to monitoring customer evaluation of service quality.

The Crowe Horwath Ireland Hotel Industry Survey

The annual report covers key issues in Ireland's hospitality sector including hotel performance, room occupancy, average daily rate and profit before tax. The annual Hotel Industry Survey serves as a benchmarking tool for the sector.

STR Global

STR Global has been providing supply and demand data for Dublin's hotel industry, since its entry into the market in recent years. Based on a survey of participating hotels it provides subscribers with key metric monthly on trends in occupancy, average daily rate (ADR), revenue per available room (RevPAR).

Industry associations

Most industry representative organisations engage in collecting data and carrying out surveys of members on performance and sentiment as well as identifying issues and trends of impact on their sectors. The Irish Hotels Federation (IHF), Restaurants Associations of Ireland (RAI), the Incoming Tour Operators Association (ITOA) amongst others are particularly active in this field. For example, the ITOA annually commissions a *Members Business Performance Report* which provides key insights, including the number and value of tourists catered for; turnover and regional distribution of business and economic contribution.

Tourism businesses

Evidence would suggest that the incidence of business collecting and analysing data on demand, market profiles and financial performance has intensified in recent years. Advancements in business computer systems have equipped operators with access to a range of new analytic tools which informs their decision making, particularly in regard to marketing and financial control. Most businesses now have immediate access to real time data on their operations.

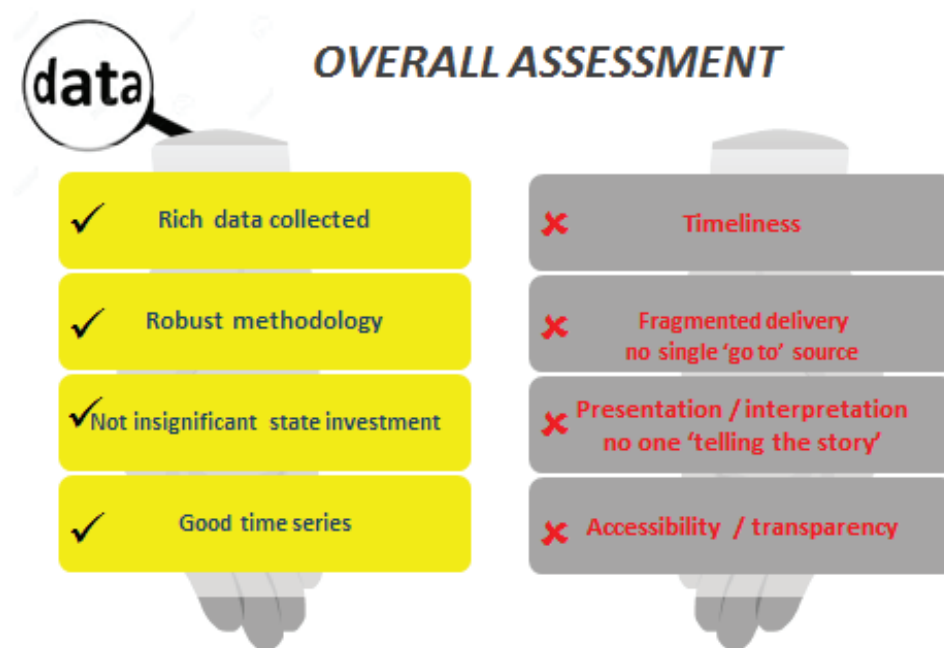
3.6 All Island Tourism Statistics Liaison Group

The All-Island Tourism Statistics Liaison Group was formally established in September 2011, replacing the Tourism Statistics Liaison Group which was established in 2009. The broad aim of the group is to improve communications and effective exchange of information between all the key stakeholders in both Ireland and Northern Ireland. The Group can also play a key role in assessing the needs and priorities of key users of statistics on Tourism. The Central Statistics Office (CSO) and the Northern Ireland Statistics and Research Agency (NISRA) are jointly responsible for convening meetings, rotating the chairing of the Group. Key members of the Group are the main national tourism agencies on the Island, Fáilte Ireland (FI), Tourism Ireland (TI) and Tourism Northern Ireland (TNI), the main Government Departments responsible for Tourism (DTTAS and DfE) and the Irish Tourist Industry Confederation (ITIC). Participation of the Group can be extended, depending on the subject being discussed. The Group meets at least once a year, while other meetings at a technical level, dealing with statistical and data issues, can be convened as required. The proceedings of the Group are published.

4. Ireland's tourism data – issues, gaps and challenges

4.1 Overview

Based on the round of consultations and the external assessor's review, an overview of the state of Ireland's tourism statistics is summarised in the table below. The ranking of the assessments reflects more the incidence of mention by stakeholders rather than an objective prioritisation of importance.



4.2 The positives

4.2.1 Rich body of data

Ireland collects a rich body of demand side tourism statistics from a range of survey and research projects, funded from the public purse. Comprehensive data is collected on the inflow and outflow of passengers arriving through air and sea ports in the Republic. This is augmented by a number of surveys conducted by the CSO and Fáilte Ireland which provide volume and value estimates of visitors and tourists by country of residence; purpose of visit; length of stay; profile, characteristics and behaviour of tourists. This in turn is complemented by survey research on holiday tourists' perceptions, motivations and evaluation of experiences in Ireland. The state tourism agencies in turn compile profiles and insights of demand from most major source markets.

Supply side data is regularly collected on performance of accommodation providers and occasional surveys of other product or service sectors catering to tourists.

The data collected is highly relevant to the policy, strategic decision making and resource allocation needs of the public and private sectors. The body of tourism data collected exceeds that of many other destinations including several European competitors.

4.2.2 Robust methodology

The quality, relevance and integrity of Irish tourism statistics are extremely high, meeting Eurostat requirements and providing robust data. The sample for the CSO surveys of overseas visitors is judged to be generous.

Major changes are underway in the provision of CAPI interviewing which will allow some more exploration, as sought by Tourism Ireland for example. There will be simultaneous changes in sampling technique too which will address issues relating to changing flight patterns and the development of Dublin Airport as an international hub for transfer passengers.

The changes also allow more in depth interview relating to expenditure by respondents which is to be welcomed. All surveys can have vulnerability in expenditure recall and the new approach will help increase the reliability of this important data component.

The consultations and analysis suggest that both CSO and Fáilte Ireland maintain a strict discipline on survey sample sizes and sampling error to ensure the accuracy of the data produced. There is the possibility that sample sizes might be larger than strictly necessary. In recent years' sample sizes of some surveys were reduced due to budget constraints but these have now been largely reversed.

In the case of NISRA in Northern Ireland their data and techniques in producing tourism statistics are being validated by the UK Statistics Agency. The practice of NISRA detailing the 'mechanics' of each of their surveys, including sampling error and approach, might usefully be adopted by other agencies responsible for gathering tourism data.

Fáilte Ireland has recently changed its contractor for accommodation occupancy surveys and a new 'dashboard' approach adopted. Such innovation is to be welcomed as it should further increase the response and reliability of the survey. It also allows benchmarking by respondents against their peers.

In short, the quality and standards of Irish tourism statistics are high and the willingness to improve where possible is actively pursued.

4.2.3 State investment

While it is not possible to accurately compute the cost to the state of the data collection and research function in tourism, from observation it would appear that the investment by the state in the collection and dissemination of statistical data on tourism is not insignificant. Despite some cutbacks in recent years, due to budgetary decisions, the state provides funding for gathering tourism data and research through the activities of the CSO, Fáilte Ireland and Tourism Ireland. In the case of the state tourism agencies the budgetary allocation to the data and research function is a discretionary one on the part of each agency from within its overall operational grant in aid. The data collection and research function in Northern Ireland has been strengthened by increased investment in recent years.

While there is always pressure to improve on the range and depth of data collected it should be recognised that costs are a critical factor. Any investment should be assessed against evidence of demand and cost effectiveness.

4.2.4 Good time series

The body of tourism data collected over the years provides the industry with an excellent time series as a basis for analysis of performance and trends in overseas demand for travel to Ireland. Time series data exists, with few discontinuities, on the composition of demand from all major source markets, mode of arrival, expenditure and other key characteristics over a 30-year period. These time series provide valuable base information for understanding and monitoring the changing levels and impact of tourism activity in Ireland.

4.3 The weaknesses

4.3.1 Poor timeliness

The delivery by the CSO of volume estimates on visitor arrivals on a three-month rolling basis within 28 days of the end of the period is a marked improvement over recent years. The data, disaggregated by the top source markets, is the top line performance metric for the sector. However, key characteristics such as purpose of visit, length of stay, and expenditure, are made available on a quarterly basis usually within 8 weeks of the end of the period. The lag time for this data tends to be longer than in top comparator destinations and deprives the industry of an understanding of the key performance indicators behind the volume data. For example, the time lag currently deprives decision makers of insights into the impact of the devalued pound sterling on expenditure by British visitors in the wake of the Brexit vote – data on expenditure for the period October-December will not be available until March.

The relevance of data published in Fáilte Ireland's annual Tourism Facts is primarily limited by the lag time in its availability. This publication is the primary release containing demand profiles and visitor characteristics derived from the annual Survey of Travellers. However, because it draws on data from various sources, including NISRA, the annual publication is not available until approximately 6 months after the end of the reference year. As a result, its value as a planning tool is diminished.

Besides the time lag in delivery, the market profiles available on the tourism agencies websites were found to dated, based on 2011/12 data in many instances. In contrast data on accommodation usage and industry sentiment tend to be contemporaneous.



Timeliness – Data delivery lag times

	CSO	NISRA	Faílte Ireland	Tourism Ireland
Monthly (rolling 3 month) volume	28 days	N/a	PR	PR
Q. & Annual (PoV; nights; spend; accom.)	10 weeks	4-5 months	PR	PR
Domestic Travel Q. HTS	12 weeks	16 weeks	PR	
Annual Tourism Facts incl. SOT		5-6 months	6-8 months	
Visitor Attitude Survey			6 months	
Accommodation survey (Monthly)		6 weeks	<1 month	
Industry Barometer / SOAR		Contemp.	Contemp.	Contemp.

CSO data releases are publicised by Fáilte Ireland on web site and by Tourism by means of press release.

4.3.2 Analysis, interpretation and presentation

The dissemination of insights derived from the analysis of data is an important tool for improving performance and fostering innovation in tourism. While Ireland is currently relatively well served by the CSO, Fáilte Ireland and other primary sources in the collection and processing of data, the value of the data collected is diminished by the absence of good insights arising from analysis and interpretation. The range of data as currently released, in the main, is rather poorly and uninterestingly presented in tabular format with little attempt to tell the story behind the data, suggesting reasons for

the results, identifying trends, or developing implications arising from the data. There is a pressing need to ‘tell the story’ and provide insights to fully realise the value to the industry of the state investment in gathering statistics on tourism. There is considerable scope to interpret the statistics in a more meaningful and holistic manner to benefit both the industry and policy makers. Good trend analysis and the underlying reasons also can lead to better forecasting. ITIC has attempted to help fill the void by producing a commentary on the principal CSO releases, without access to the raw data. The opportunity exists to greatly enhance the analysis and interpretation together with dissemination of the data through the use of infographics, webinars, podcasts and apps.

4.3.3. No one ‘go to’ source

Several producers of statistics - official and others - play an important role in providing and dissemination key information on tourism. However, no one source exercises overall responsibility for tourism statistics and their dissemination and interpretation. This leads to a lack of strategic approach for the development of statistical data, although the formation of the All Island Tourism Statistics Liaison Group has provided a vehicle for the exchange and co-ordination of the public sector agencies engaged in gathering data.

The tourism industry currently lacks a single authoritative data and interpretative source. The issue is exacerbated by the organisational architecture of the state tourism agencies. Fáilte Ireland and Tourism Ireland, each through their respective Research & Insights Departments, play a role to varying degrees in the collection, analysis, interpretation and dissemination of data. This can lead to some overlap and duplication. The fragmented approach to interpretation and communication also risks leaving users confused and can potentially undermine the trust that the data is held in. A single collaborative online source of tourism data and statistics would be welcome and offer an easy-to-use portal for the tourism industry and public.

4.3.4 Accessibility & transparency

The CSO’s *StatBank* provides a facility for limited mining of the data from the CRS, CPI and HTS. In addition, the CSO does entertain requests for more detailed analysis provided the sample size supports the analysis.

The dissemination of the output of data collected from the Survey of Travellers is limited to selected tables published in Tourism Facts, market profiles and other reports. The selected profiles presented in tabular form undersell the wealth of information collected by the survey which is of interest to businesses. The ability to generate cross-tabulations which has been made possible by computerisation of which there are some fine examples, demonstrated by VisitBritain amongst others, would greatly enhance the value to the industry.

There is a marked lack of transparency surrounding the process of data collection and research projects when compared to the selected comparator destinations. In many other jurisdictions, there is an openness in regard to public sector funded projects. For example, in comparator destinations the questionnaires used in travel surveys are published, as are the terms of reference and reports from all publicly funded research projects.

4.4 ‘Gaps’ - opportunities & challenges

In the course of the review a number of other issues were raised which warrant consideration, including some identified shortcomings in the data currently collected, new sources and methodologies, together with some challenges facing the provision of reliable and timely data for the industry.

4.4.1 Making the economic case for tourism

The tourism industry in Ireland currently suffers from a lack of rigorous data about the economic significance of tourism,

and the role it plays in the Irish economy, in order to inform policy. The consultations pointed to the need for more precise and rigorous information about the economic significance of tourism and its various roles in the Irish economy. This gap was seen as a handicap to monitoring the development of tourism, justifying public sector investment in the sector and to developing effective policies.

A Tourism Satellite Account (TSA) is internationally considered as fundamental to acknowledging the economic weight of tourism within an economy and to comparing tourism to other industries. For many destinations TSA has become an essential tool in the system of tourism statistics. The industry would welcome a more robust assessment of tourism as an economic activity. TSA would provide more comprehensive and reliable data linked to framework of national accounts and ultimately to the body of integrated economic statistics. TSA is seen as a tool capable of providing a more complete basis for policy decisions, as well as facilitating the industry in its advocacy role. The current situation where robust objective metrics for the contribution of the sector to GDP, employment levels, and taxation revenues, based on comprehensive tourism related expenditures, are lacking is a cause for concern for the industry.

A pilot TSA undertaken in 2004, with support by Fáilte Ireland, identified the data gaps which prevented a complete TSA from being developed. Areas where data was absent included domestic consumption, particularly the absence of any data on day trips. TSA would also provide a base to calculate indirect and induced impacts of tourism, particularly in terms of employment at regional level.

While there would appear to be no immediate plans to compile a fully-fledged TSA the industry runs the risk of being disadvantaged in prioritising national economic policy programmes and subsequent investment programmes.

An alternative approach to measuring the economic value of tourism has been taken in the UK which aims to provide a contemporaneous assessment rather than the time lagged results from TSA.

[A briefing note on TSA is attached as Appendix C]

4.4.2 Regional data

The industry views the availability of regional data as an essential component of tourism's data set – a view which aligns with many government policies that place a focus on sustainable regional economic and social development. Currently the data on regional distribution of overseas tourism demand is based Fáilte Ireland's Survey of Travellers, while some data on regional distribution of domestic travel demand can be sourced from the CSO's HTS. Performance and economic information on tourism at regional level is currently judged to be less than ideal to guide policy and investment in the context of national economic strategy.

The views expressed would favour more robust, comprehensive and timelier release of available data as both a planning tool and a monitor of performance. Some concerns were raised that the data may not be continued to be produced along the lines of the traditional tourism regions but rather to reflect the branded propositions of the Wild Atlantic Way (WAW), Ireland's Ancient East and Dublin. This would be viewed as unhelpful and potentially confusing due to the lack of clear delineation between the branded regions. Measures to improve the data on regional distribution and performance would be welcomed.

The move by the CSO to CAPI could provide an opportunity to collect data on the distribution of tourists throughout the country thereby producing more speedily available data from a larger sample of visitors. The IPS in the UK is the basis for this data on visitors to Great Britain.

4.4.3 Visitor expenditure estimates

Expenditure estimates raised some discussion as to the robustness of the data collected based on visitor recall at point of departure. Several suggestions were received regarding alternative or supplementary methods of measuring expenditure. These included visitor expenditure diaries and the use of electronic transactions (ATM withdrawals and credit/debit card use). The use of expenditure diaries by means of an app could provide good insights into expenditure by nationalities, while the use of electronic transactions could provide an index of movement in expenditure from a base year but not weighted up to give an estimate of total expenditure. Both methods would also provide valuable insight into the expenditure patterns by location/areas visited and category (accommodation, food, retail, etc.). Some work already been carried out by banks and credit card companies which has the potential to complement existing methodologies and provide new insights. However, currently there are a number of data protection issues which prohibit the implementation of some of the above suggestions.

4.4.4 Ireland's competitiveness

The competitiveness of the Irish tourist offering is perhaps one of the most important variables in performance. The adverse impact of loss of competitiveness can be amply demonstrated from Ireland's experience in the noughties. Despite this there is only scant data monitoring tourism competitiveness across source markets. While post-visit surveys collect information on visitor's assessment of satisfaction and value for money, there is currently no monitor of movement in competitiveness of a visit to Ireland relative to competitor destinations from the key source markets based on cost of access, key inputs at the destination and currency based on purchasing power parity for various nationalities.

4.4.5 Forecasting

Annual forecasts tend to be limited to top line forecasts sourced externally and published annually by Tourism Ireland. While forecasting is not an exact science, the actual performance in recent years has tended to be wide of the forecast. For example, 2016 forecasts were +4% for volume and +5% for value, when in fact they are likely to be +10% and +12% respectively. Views expressed suggested that the black box forecasts, while mirroring the economic and outbound forecasts for the major source markets, perhaps failed to give adequate weight to indigenous or other unique factors such as price competitiveness and access capacity. The view was that perhaps the introduction of scenario planning as a forecasting method might be more meaningful as a planning tool.

4.4.6 Harnessing developing technologies

Mobile telephone positioning data can be used to improve the monitoring and understanding of visitor itineraries in the country which can complement traditional statistical sources. The potential use of mobile data for tourism purposes is in early stage development and warrants more methodological work on collection and use, as well as clarification of data protection issues.

4.4.7 Monitoring seasonality

As Ireland experiences increasingly high demand and high utilisation of the tourist product during the peak period, business economics and national goals will necessarily focus on generating incremental growth in periods of low demand. Data analysis will play a key role in understanding demand patterns, motivations to travel and the counter peak seasonal strategies. A recent analysis from Fáilte Ireland, using the Gini Coefficient tool, has produced a very informative seasonal distribution of demand from each of the main sources markets. When fully developed and available this can provide a valuable tool in informing strategic destination marketing decisions and allocation of resources in the future, as well as identifying how best to optimise use of tourism products.

4.4.8 Data on sub-sets of visitors

A number of visitor sub-sets were identified where estimates or characteristics are limited or less than robust or where it is not possible to disaggregate profile information. In some instances this would require new methodologies, revised survey questionnaire and/or definitional changes. These sub-sets include:

- Cruise passengers: particularly reliable estimates of value;
- Conference visitors: refinement of definitions and disaggregation;
- Profile of holiday visitors by package/independent/group may require a redefinition of terms in questionnaire to reflect changes in process and channels of booking.
- Language students: estimates of volume and value by market.

4.4.9 Survey interviewing

It is recognised that securing effective interviews at air and sea ports is becoming more challenging due to the range of retail and other attractions vying for passengers' attention and time. Furthermore, the allocation of departure gates at busy airports during peak times can be announced close to departure time, leaving less time for the identification and interviewing of passengers on selected flights – a sampling procedure used for many surveys. However, the use of computer assisted questionnaires and self-completion online surveys offer benefits of speed and allow for more questions than the completion of paper questions.

5. International comparators

Destinations currently viewed as best in class with regard to the collection, analysis, interpretation, and communication of tourism data and research insights include Britain, Canada, New Zealand, Australia and Germany. For the purpose of this review two destinations: New Zealand and Britain were chosen for examination. The main focus of the review is on output from a user perspective rather than on the technical aspects of the collection and processing of data in each destination.

5.1 New Zealand

Tourism is one of the country’s leading export industries, accounting for 3.7 % of GDP and employing an estimated 6% of the country’s workforce. The availability, to government and to the industry, of better information has been recognised as a key part in advancing the growth of the sector. The *Tourism Data Domain Plan*, produced in 2011 and reviewed in 2015, provides a road-map for the compilation, dissemination and use of tourism statistics. The aim of the plan is to provide relevant information in a timely and economical way for use by government and businesses.

Fig. 5.1: Tourism data source map

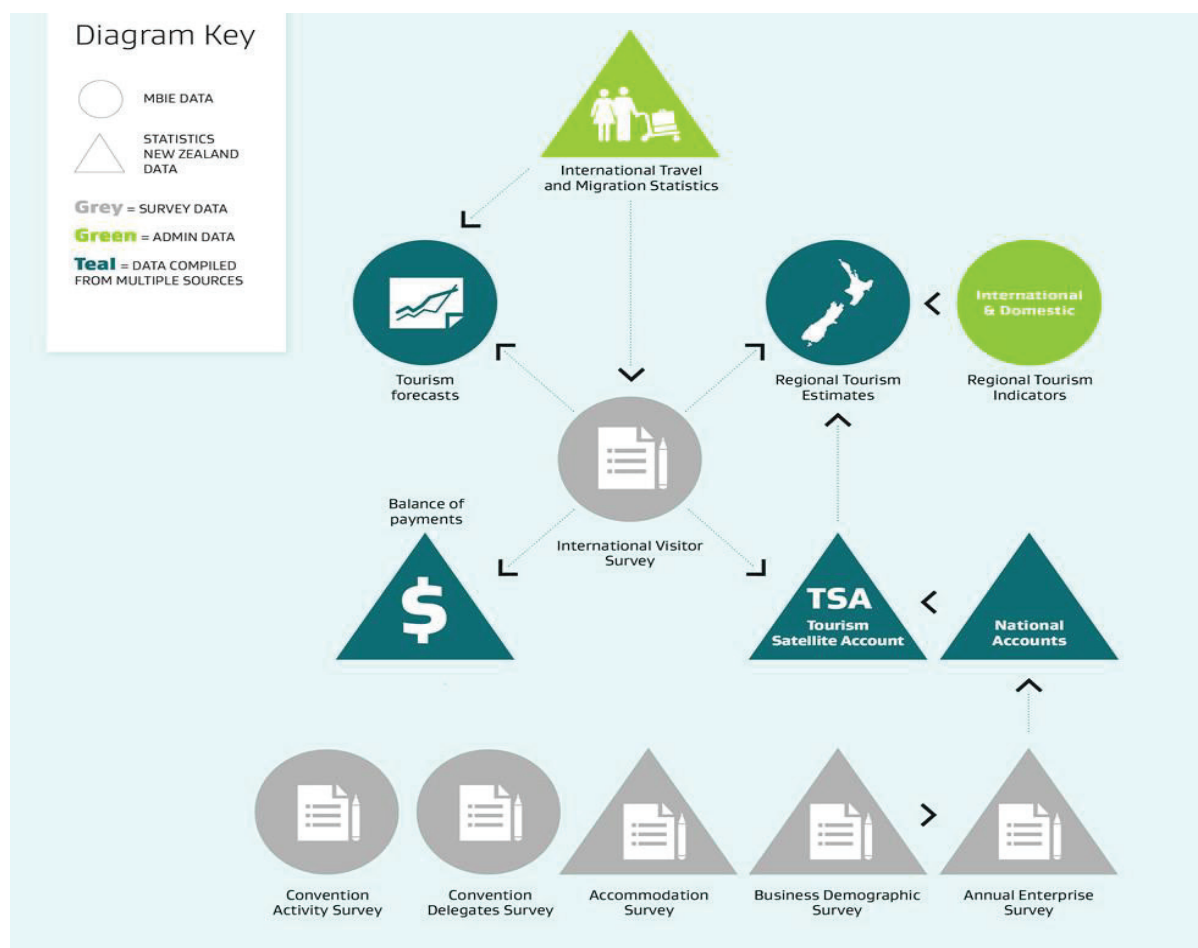


Fig. 5.2: Key data outputs

Output	Frequency	Lag time
Visitor arrivals (preliminary)	Weekly	1 week
Visitor profile & characteristics	Monthly	3 - 4 weeks
Visitor behaviour & expenditure	Quarterly	6 - 8 weeks

Due to its geo-political situation, an arrival and departure card system is in operation which allows for a census of visitors and collection of some key profile statistics. Data on the volume of arrivals are released on a weekly basis with more in-depth details released on a monthly basis. Visitor arrival data comes from Statistics NZ's *International Travel and Migration dataset*, derived from information contained in electronic records supplied by the New Zealand Customs Service, as well as from arrival and departure cards completed by passengers.

A monthly report *International Visitor Arrivals to New Zealand (IVA)*, produced by Statistics NZ and sponsored by Tourism New Zealand, provides detailed tables and graphs of monthly and annual data, showing the number and characteristics of visitor arrivals from New Zealand's top 15 source markets. The monthly arrivals report (in Pdf and Excel format) contains some 60 tables that include key characteristics of visitors' overall plus analysis by key countries and Australian states.

International Visitor Survey (IVS), under the aegis of the Ministry of Business, Innovation & Employment (MBIE), provides data on the characteristics, behaviour, and expenditure of international visitors and is published quarterly.

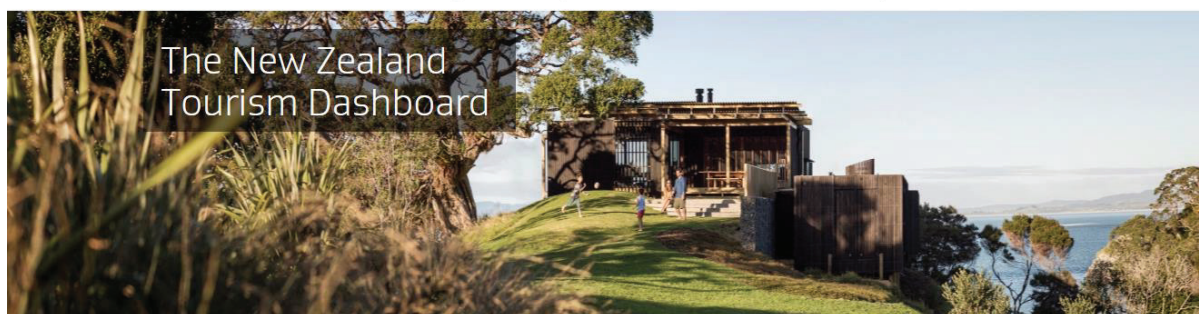
The Quarterly data provides a greater level of refinement and the ability to search within a 'pivot' table.

The screenshot shows the NZ.Stat website interface. On the left, there is a navigation menu with 'Data by theme' and 'Popular queries'. The 'Tourism' section is expanded, showing various survey categories. The main content area displays the 'International Visitor Survey: Place visited (RTO)' table. The table has a complex structure with multiple levels of filtering (Country of permanent residence, Purpose of visit, Regional council, Regional tourism organisation) and a 'Measure' section. The data is presented in a pivot table format with columns for 'Total visitors' and 'Number of respondents' across various regional tourism organisations (All, Auckland RTO, Bay of Plenty RTO, Central Otago RTO, Christchurch, Clutha, Coromandel RTO, Dunedin) and rows for 'Year ending' from 1997 to 2002.

Year ending	All		Auckland RTO		Bay of Plenty RTO		Central Otago RTO		Christchurch		Clutha		Coromandel RTO		Dunedin	
	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents	Total visitors	Number of respondents
YEDec 1997	5,151,449	21,258	1,020,851	4,034	48,644	183	11,991	50	590,404	2,513	3,596	18	87,732	352	163,660	
YEDec 1998	5,259,305	21,606	971,179	3,807	69,930	269	12,700	55	561,681	2,370	9,586	38	109,090	456	175,979	
YEDec 1999	5,636,724	22,844	1,029,171	3,908	78,631	302	18,798	79	633,419	2,658	10,669	48	107,111	447	199,679	
YEDec 2000	6,218,225	22,866	1,145,442	3,971	82,303	281	17,053	64	671,258	2,598	12,316	45	127,097	476	208,188	
YEDec 2001	6,497,469	22,414	1,184,687	3,738	96,094	296	23,301	80	698,497	2,556	11,843	41	139,153	458	211,160	
YEDec 2002	6,775,391	21,408	1,277,503	3,677	94,665	268	16,374	51	739,102	2,461	13,646	42	131,939	397	222,557	

In addition, Monthly Regional Tourism Estimates are produced of expenditure on tourism from both international and domestic consumers.

The New Zealand Tourism Dashboard is a one-stop shop for all information about tourism. It brings together a range of tourism datasets produced by MBIE and Statistics NZ into one easy-to-use tool. Information is presented using dynamic graphs and downloadable data tables. It includes regional data from a variety of sources and highlights issues impinging on performance. App access is also provided.



In addition, MBIE has been to the forefront in the development of Tourism Satellite Account (TSA) and since 1999 its international tourism forecasting model. The latest Tourism Satellite Account (TSA) 2015 (summary year to March 2015, released in October 2015) provides a picture of the role tourism plays in New Zealand economy, in terms of expenditure and employment, with information on the changing levels and impact of tourism activity.

Annual forecasts for a seven-year projection period provide expectations on the future tourism demand and are intended to support the tourism sector and government in decision making and planning. The tourism forecasts are based on econometric modelling, current trends and best available forecasts of international factors and have been developed with input from members of the tourism industry. The MBIE forecast include an interactive web tool for users while making available micro-data in Excel format the data used to produce the tourism forecasts.

Roles & responsibilities

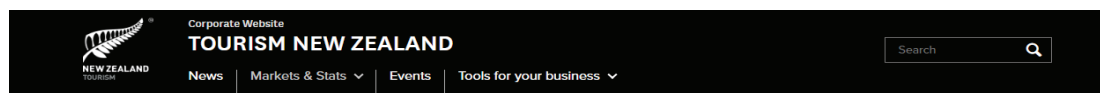
Three state bodies collaborate to provide tourism data, namely:

Statistics NZ collects the following tourism data:

- arrivals and departures by overseas visitors and New Zealand-resident travellers;
- expenditure by domestic and international visitors;
- tourism employment;
- contribution to GDP;
- accommodation statistics.

Ministry of Business, Innovation & Employment (MBIE), responsible for tourism policy, strategy and budgets and financial support schemes, provides important visitor data from the continuous International Visitor Survey. The survey, covering some 9,800 international visitors annually in a two-part process of visitor screening followed by an online survey, gathers information on visitor expenditure, places visited, activities/attractions, accommodation and transport. MBIE has primary responsibility for the analysis, interpretation and dissemination of tourism data.

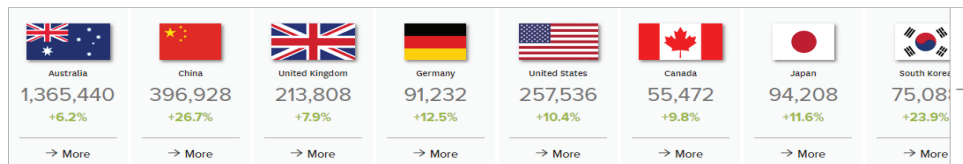
Tourism New Zealand is the state funded national marketing agency. Its website provides online interactive access to a comprehensive body of data and insights on tourism from its top markets for use by the industry.



Markets & Stats

Jul 2015 - Jun 2016

International Visitors Arrivals

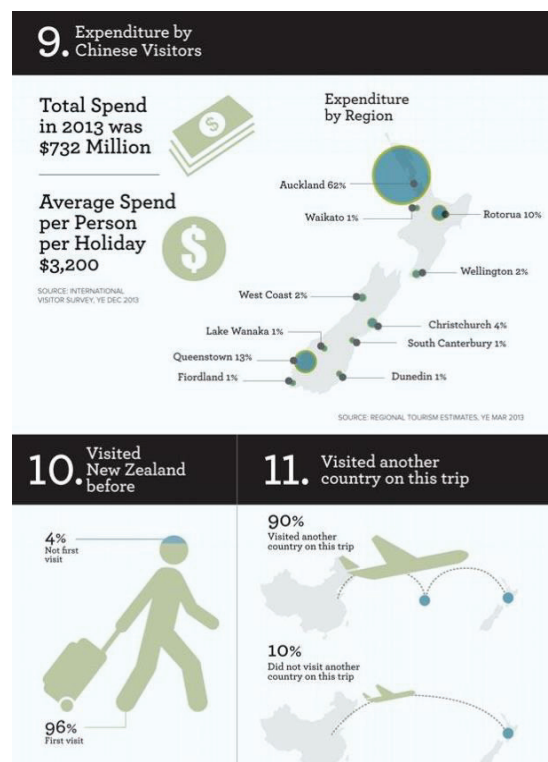


Apr 2015 - Mar 2016

International Visitor Expenditure



Tabs take the user to market trends and to valuable insights into doing business in China, including a Toolkit which provides detailed information and guidance. The content ranges from infographics on all aspects of the market and the visitors – to information to help businesses deal with Chinese customers ranging from etiquette to food to training plus details on what Chinese visitors need to know about coming to New Zealand.



Some take-away lessons

The approach taken by New Zealand provides valuable lessons in the utilisation of tourism statistics.

- The collaboration between the state agencies is focused on obtaining, presenting and disseminating statistics so that the industry can compete successfully and flourish. There is clear co-ordination from the government department and its own role and focus is clear. It links effectively to Tourism New Zealand and Statistics New Zealand and the industry is considered as a prime partner whose needs are important.
- The *Tourism Data Domain Plan*, developed in consultation with stakeholders, including tourism businesses and government in 2011, provided a focus on the compilation, dissemination and use of tourism statistics. Its implementation has progressed in a staged way, as time and funds become available, while continuing to engage with stakeholders throughout this process. The review panel in 2015 found that a considerable amount of progress had been made as the MBIE had successfully redeveloped the International Visitor Survey (IVS); developed regional tourism indicators; and improved its forecasting methodology. The overall result was increased efficiency and decreased gaps in the tourism statistics, while increasing the availability of the tourism data and streamlining the dissemination of tourism statistics making it easier for customers to access.
- The timeliness of delivery, analysis and communication of the data outputs is impressive. While acknowledging the benefit of arrival and departure card system for basis volume data, the process of collection and analysis of survey data to produce quarterly statistics on expenditure and other trip and visit characteristics within 6-8 weeks, including regional data is reported to be regarded as a particularly valuable to the industry.
- New Zealand has continually upgraded its processing systems combined with improved methodologies and great use of automation to produce more timely data.
- Responsibility for analysis and interpretation of tourism data from a range of sources rests with one agency.
- The Tourism Dashboard provides a one-stop repository as a valuable resource for stakeholders.

5.2 Great Britain

Key tourism data collected

The International Passenger Survey (IPS) is a continuous survey carried out by the UK's Office for National Statistics (ONS). The IPS conducts between 700,000 and 800,000 interviews a year at all major air, sea and tunnel ports, providing detailed information on the numbers and types of visits made by people travelling to and from the UK.

The results are primarily used to:

- measure the impact of travel expenditure on the UK economy
- estimate the numbers and characteristics of migrants into and out of the UK
- provide information about international tourism and how it has changed over time

The data collected provides the primary data source for VisitBritain's analysis, with monthly, quarterly and annual releases on visits to the UK by overseas residents.

Fig. 5.3: Key data outputs

Output	Frequency	Lag time
Visitor arrivals (month, YTD & rolling 12 months) <ul style="list-style-type: none"> • Visits, spend, purpose of visit, & origin (7 global regions) 	Monthly	7 weeks
Visitor profile & characteristics <ul style="list-style-type: none"> • Data on breakdown visits, nights and spend by market and purpose of visit. 	Quarterly	6-8 weeks
Inbound Tourism Trends <ul style="list-style-type: none"> • A digest of all the latest inbound tourism survey information alongside an analysis of factors that underpin the trends. 	Quarterly	8-10 weeks

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Roles & responsibilities

Office for National Statistics (ONS) collects national survey data on leisure and tourism and publishes datasets. These include Monthly Overseas Travel & Tourism; International Passenger Survey time series dataset; UK Residents Visits Abroad; Overseas Travel & Tourism and Travelpac – a series of files aimed at small businesses and students.

VisitBritain provides digestible background information such as an up-to-date ‘snapshot’ on market and industry sector performances and trends. In addition, it conducts bespoke research to help inform policy debate as well as providing tourism demand and forecasting data to regions, cities and other locations in the UK. Each year VisitBritain sponsors questions on the International Passenger Survey to provide data for insight into various aspects of international visitation to the UK.

Analysis and interpretation leading to insights

VisitBritain is the recognised and authoritative ‘go to’ source for analysis, interpretation and communication of tourism research and insights in the UK. The organisation has developed a suite of outputs based on an analysis and interpretation of the IPS output. Furthermore, the organisation draws on a plethora of sources that help describe the current ‘state of the nation’ other than dedicated tourism surveys thereby providing a broader understanding of what is happening in the international travel market.

The outputs include:

- *Market Snapshots* - designed for those who want ‘everything on one page’;
- *Market Profiles* – catering to those who want an in-depth knowledge of a particular market;
- *Tourism Topics* – a monthly publication that reports on various issues impacting on the inbound visitor market;
- *Current Conditions* – a fortnightly ‘at a glance’ view of how the market is doing and what those factors that determine its health are developing.

The screenshot shows the VisitBritain website interface. At the top left are the VisitBritain and VisitEngland logos. To the right is a search bar. Below these are navigation links: Latest news & media centre, Who we are & what we do, Campaigns & opportunities, Developing England's tourism, International marketing advice, England research & insights, Inbound research & insights, and Inbound markets & segments. The main content area features a large tile for 'Inbound research & insights' with a scenic landscape image and a text box titled 'Sharing our inbound tourism knowledge' containing a question and an answer. Below this are two smaller tiles: 'Latest inbound tourism data' with an image of people at a table and 'Visits to nations, regions and counties' with an image of a castle at night.

International Passenger Survey is available in Excel pivot table format through VisitBritain’s website, empowering others in the tourism research field to explore data in ways that meet their needs. The use of pivot tables and the ability to download specific analyses gives a breadth to the use of data by industry or researchers that is very broad indeed. Users are empowered with this data and the ability to interrogate it while the workload on VB staff is reduced.

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Communication and access to data & research outputs

VisitBritain's approach is to provide easy user access to data in a digestible format, demonstrating its strengths and occasionally its weaknesses. For the researcher or business interested in in-depth analysis online tools are provided to do this easily. VisitBritain provides data and analysis linked to markets and all other knowledge resources that the organisation uses to carry out its international role. VisitBritain's online platform provides access to a range of data, analysis and commentary on inbound UK tourism and, more recently, domestic tourism in England.

Inbound tourism performance <ul style="list-style-type: none">• Latest monthly data• Latest quarterly data for the UK overall• Latest quarterly data by area• 2015 snapshot• Inbound tourism trends by market• Inbound nation, region & county data• Inbound town data• About the International Passenger Survey	Sectors <ul style="list-style-type: none">• Inbound accommodation research• Activities undertaken in Britain• Inbound countryside & coast research• Inbound culture, heritage & attractions research• Inbound food & drink research• Inbound football tourism research• Inbound shopping research• Inbound sport research• Inbound transport research	Inbound tourism conditions <ul style="list-style-type: none">• 2016 inbound tourism forecast
Britain's competitiveness <ul style="list-style-type: none">• Britain's visitor economy facts• Britain's image overseas• Britain tourism strategy• Britain's welcome• Advising Government and industry on policy	More about British tourism <ul style="list-style-type: none">• Introduction to tourism• Structure of tourism in Britain• Further resources• Industry groups & bodies	

The website is well designed and good signposting ensures ease of navigation. The information is presented in a concise fashion and interactive functions allow the user to interrogate the data to provide customised outputs. For example, for each source market it is possible to filter the data by a number of variables, including purpose of visit, transport, independent or package, season, and duration of visit for a number of key demographics. A similar search facility is offered to analyse data on regional tourism – visits, nights spent and expenditure.

In addition, it is possible to download CSV files of raw data, including sample sizes. The use of pivot tables and the ability to download specific analyses gives a breadth to the use of data by industry or researchers. The download and interactive functions expand the usefulness and uses of the data while reducing the workload of VisitBritain staff in responding to requests for customised data.

Some take-away lessons

- *VisitBritain* has established a reputation for delivering top-notch market intelligence in an informative and unbiased manner as a 'USP' for the organisation. Over the past decade, Visit Britain has cemented the organisation's position as 'the' agency able to provide intelligence on inbound tourism, as well as a trusted advisor to government.
- The ethos behind tourism research and data analysis conducted by VisitBritain was to demonstrate that the organisation was 'an authority on inbound tourism' to its stakeholders, including government, industry partners and the media. This was achieved thanks to a number of factors acting in combination based on a research plan

including buy-in from Board and Senior Management; building the right team of skills; making most of available resources; and skilful communication of the output of analysis and interpretation.

- As statistical compendia probably fall into the category of publications that have the greatest potential to provide insight but the least success at actually doing so, VisitBritain has focused its resources on providing insights through the development of in-house expertise. The successful execution of the function does not necessarily require significant manpower, the Visit Britain research and insight team numbers no more than five people.
- The organisation appears to have been successful in finding innovative ways of getting the most out of the available surveys and data capture mechanisms, including a close collaboration with the Office for National Statistics, who are responsible for the long running IPS. In addition, VisitBritain has fostered a strong relationship with the Anholt GfK Nations Brand Index, thereby allowing the organisation to track sentiment towards Britain in a consistent and cost-effective fashion.
- VisitBritain does not rely on statistical reports published by a national statistics authority, or on a 'deck' presented by a research agency at the end of a project, which can be highly limiting. Access to the raw data, and the skills necessary to interrogate that data (and know where its limitations) has allowed more questions to be answered, hypotheses tested and ideas explored.
- An active communication programme including engagement with a range of social media has helped research and statistics reach places that it may otherwise never get to. VisitBritain promotes its outputs through Twitter and monthly YouTube video updates, which allows users to access statistics, and more importantly the interpretation of the data, at a time and place most convenient for the user.
- In addressing the lack of a comprehensive and up-to-date set of metrics describing the economic importance of tourism, VisitBritain worked with Deloitte and Oxford Economics to establish estimates of tourism's importance to the economy in terms of both share of economic activity and through sustaining and creating job opportunities. While Tourism Satellite Accounting is aspired to, VisitBritain took a 'real life' view that industry needed estimates of tourism's importance now and in the future, not of its importance two or three years ago as provided by TSA.

6. Conclusions & recommendations

6.1 Rich body of tourism data & new pipeline opportunities

The overall consensus is that Ireland currently collects a rich body of demand side tourism statistics. The macro data collected by the CSO is highly valued as is the data on markets and customers produced by Fáilte Ireland and Tourism Ireland. The quality and range of tourism data collected exceeds that of many destinations including several European competitors. The data collected is highly relevant and valuable to the public and private sectors for guiding policy development and strategic investment and business decisions.

While more or better data does not guarantee better decisions, better policy and business decisions nearly always start with better data and its interpretation. Up to date tourism intelligence and economic information are very important public goods for the private sector.

Mobile technology applications offer a game changing opportunity to improve visitor tracking, data collection, and delivery of data in a timelier manner.

Recommendations

- *Continue to evolve using best practice methodologies and modern technologies to generate reliable, usable, practical information to meet the needs of the range of stakeholders, using up to date methodologies and technologies.*
- *Exploit computer assisted and online interviewing technologies and the use of apps to improve the accuracy of data collection and processing speeds.*
- *Examine the possible realignment of the current 3 exit surveys through the use of computer assisted and/or online self-completion surveys. The move by CSO to CAPI warrants consideration of merging of CRS and CAPI, together with incorporating a number of questions currently in the Survey of Travellers (SOT).*
- *Use computer assisted interview with a redesigned SOT to achieve a sample size adequate to collect data on both main and secondary markets and customer segments.*

6.2 Need to improve timeliness of key data

The outcome of the consultations points to a need to reduce the lag time and improve the timeliness of the release of data to more align it with business cycles. The move by the CSO to computer assisted interviewing and a consolidation to one survey could deliver the monthly data to include expenditure estimates and purpose of visit data, as is the case in the UK.

Recommendations

- *Using the opportunity presented by the move to CAPI, CSO to work towards monthly releases on volume, value, purpose of visit data from the main markets. This timelier access to performance metrics would bring potential benefits in informing decisions by state agencies and businesses.*
- *More timely releases from the annual Survey of Travellers and Visitor Attitude Survey from Fáilte Ireland are highly desirable. Fáilte Ireland should consider weighting the SOT from CSO annual data rather than waiting for data on indirect arrivals via Northern Ireland which is reported to be the main cause of the delay – perhaps parallel methodologies could be tested in 2017. The time lag in publishing the results of the Visitor Attitude Survey needs to be minimised.*

6.3 Tourism data under harvested: need to dial up analysis, interpretation & communication

There is a pressing need to 'tell the story' if the value to the industry of the state investment in gathering statistics on tourism is to be fully realised. Statistical compendia, however robust, fall short of delivering value unless they provide insights. Much of the statistical and research outputs currently lack analytical commentary and fall short of delivering a well founded interpretation of what is going on. Table after table of a point in time statistics fail to harvest the full value of data outputs as an aid to informing decisions and does little to raise the profile or standing of those providing market intelligence regardless of how accurate the data might be or whether its purveyor thinks that it is answering the questions posed by decision makers. The ability to dig into the data, whether from the continuous national surveys or from bespoke pieces of commissioned research, is critical to providing insights of value to stakeholders by talking with confidence about what is going on. In addition, the benefits of conducting time-series analysis should not be underestimated as it helps decision makers to understand the context in which the very latest data sits.

The tourism industry currently lacks a single authoritative data and interpretative source. The issue is exacerbated by the organisational architecture of the state tourism agencies, leading to a perceived duplication or overlap of responsibilities and less than efficient use of resources in the area of data collection, interpretation and delivery of insights.

Making data accessible to the industry including the facility to interrogate the statistics would enhance their value. Traditionally the output from surveys has been limited to publishing tabular summaries from key questions.

Recommendations

- *Establish a single online source for Irish tourism data and statistics – a collaborative website (e.g. www.irishtourismdata.ie) that can be updated regularly by Fáilte Ireland, Tourism Ireland and the Department of Transport, Tourism and Sport, and be a well presented, easy to use portal for the interpretation and communication of relevant Irish tourism research and statistics. Properly resourced this could significantly improve the delivery of value to all stakeholders, provide efficiencies and build functional expertise. Such a 'one-stop-shop' website would be of benefit to the tourism industry and the wider public.*
- *Invest in skills and expertise to deliver an authoritative interpretation based on informed analysis and communicated in a user-friendly manner.*
- *Adopt an outward facing approach to the interpretation, bringing in other sources of information and insight to help in telling the story more effectively, rather than focusing exclusively on historical data.*
- *Adopt current best practice by providing online access to survey findings from the SOT and improve access to CSO data to allow for data mining by stakeholders. The centralisation of data and research through a Fáilte Ireland portal would provide users with the ability to customise the information to meet their needs. The VisitBritain site could provide a model to aspire to.*
- *Ensure better efficiencies and avoid duplication across tourism state agency research functions.*

6.4 A holistic plan

Tourism statistics in Ireland are derived from a variety of sources leading to fragmentation. Stronger co-ordination and co-operation between producers and end-users of tourism data would improve efficiency, relevance and timeliness of data and assist in the delivery a more holistic interpretation of data collected.

The consultations pointed to the need for more precise and rigorous information about the economic significance of tourism and its various roles in the Irish economy, in addition to the available performance metrics. This gap was seen as a

Improving Tourism Data for Sustained Growth

handicap to monitoring the development of tourism, justifying public sector investment in the sector and to developing effective policies.

ITIC is committed to collaborating in the collection of research data through encouraging its members' participation in surveys, the fostering of better data collection and research practices within the business community, and by contributing to the analysis and communication of outputs as appropriate.

Recommendations

- *Establish a Research Forum to allow for an industry interface between data providers and users to improve communication and the value of data collected. It is envisaged that the Forum would be comprised of relevant state agencies, academics, and representatives of tourism and allied businesses.*
- *Develop and publish a 5-year domain plan for tourism statistics and research engaging industry representatives with CSO and tourism agencies.*
- *Conduct an efficiency review of the programme of survey and research outputs from Fáilte Ireland, Tourism Ireland, ITIC and industry associations with a view to maximising co-ordination and value for money.*
- *Establish a working group to engage with mobile and Big Data providers – mobile telecom operators, banks, credit card companies, etc. - to identify opportunities for gathering more insights into tourist demand and behaviour patterns.*
- *Engage with an academic institution to assess the feasibility of developing a TSA for Ireland, or an alternative economic model, within an agreed timeframe.*
- *Establish a process to allow for a review of all surveys with the industry to assess the relevance and value of the line of questioning for stakeholders, as well as publishing for comment proposals for new survey and research projects in advance of commissioning.*
- *Explore models of co-funded research with industry partners, to add value and/or expand the range of data collected and research commissioned.*

6.5 Post-Brexit

The exit of the UK from the EU could have implications for the collection of travel and tourism statistics in the future. As the terms of Brexit have yet to be negotiated the extent of any impacts is as yet unknown. The factors which could impinge on the collection of data include a hard border with Northern Ireland; the abolition of the Common Travel Area with the UK; and the withdrawal of the UK's compliance with Eurostat protocols.

APPENDICES

Appendix A: Terms of reference

1. Objectives

- Assess the current body of tourism data – sources, reliability, timeliness, appropriateness, usefulness and accessibility.
- Identify any data / research deficiencies at national and sub-national levels.
- Review currently deployed methodologies to identify any shortcomings and possible improvements.
- Specify the ideal level and frequency of market and customer data to best inform business decisions.
- Critically assess the timeliness of current tourism data and research outputs, its communication, use and accessibility by stakeholders.
- Propose changes for consideration in regard to collection methodologies and dissemination in the provision of statistics of adequate quality to meet users' needs.

2. Scope

- Review existing data collection methodologies, sources and reporting formats to identify shortcomings and gaps.
- Identify and examine current obstacles to adequate and timely data collection and a critique of dissemination means being used.
- Propose, where appropriate, changes for consideration in regard to collection methodologies and means of dissemination of statistics of adequate quality to meet users' needs.
- Draw on current 'best practice' from comparator destinations.

The review aims to cover the range of tourism data sources and outputs, including consulting with key providers and users to identify and prioritise their requirements:

- CSO;
- Fáilte Ireland & Tourism Ireland;
- NISRA & Tourism Northern Ireland
- Air and Sea carriers & ports;
- Trade associations; and
- Commercial sources.

The CSO's obligations with regard to EU Directive on the Provision of Tourism Statistics as well as meeting National Statistics standards and obligations are acknowledged, as are the resource constraints on public sector agencies.

Appendix B: List of consultations

Organisation	
Abbey Tours	John Healy
Aer Lingus	Declan Kearney
CSO	Paul Crowley Patsy King Mairead Griffin Edel Flannery
daa	Cormac O'Connell Mark Evenden
Fáilte Ireland	Caeman Wall
IBEC	Gerard Brady
Irish Ferries	Nick Mottram
IHF	Tim Fenn
ITOA	Ruth Andrews
NISRA	Joanne Henderson
Ryanair	Diarmuid Ó Conghaile
Shannon Group	Nandi O'Sullivan Declan Power Maire Slattery
Tourism Ireland	Peter Nash
Tourism Northern Ireland	Pamela Wilson Anne Marie Montgomery
University of Limerick	Prof. Jim Deegan
International reviewer	David Edwards

Appendix C: Tourism Satellite Accounts (TSA) – briefing note

Tourism, unlike ‘conventional’ industries such as agriculture or manufacturing that are classified according to the goods and services they produce, is defined by the characteristics of the customer demanding tourism products. Tourism products can cut across standard industry definitions, and therefore require a different approach.

Satellite accounts are an extension of the core national accounts, and involve the rearrangement of existing information in the national accounts so that an area of particular economic or social importance can be analysed more closely.


The Tourism Satellite Account (TSA) is a standard statistical framework and the main tool for the economic measurement of tourism. The TSA thus allows for the harmonization and reconciliation of tourism statistics from an economic (National Accounts) perspective. A tourism satellite account integrates data about the supply and use of tourism-related goods and services into a single format. It provides a summary measure of the contribution tourism makes to production and employment, consistent and integrated with official national accounts. This ensures that the importance of the tourism sector is measured and understood in the context of the economy as a whole. Tourism satellite account measures expenditure by both resident and non-resident tourists, and thus gives a picture of the overall size of the tourism industry, including its contribution to gross domestic product (GDP) and employment. This enables the generation of tourism economic data -such as Tourism Direct GDP - that is comparable with other economic statistics.

TSA can provide a picture of the role tourism plays in Ireland’s economy in terms of expenditure and employment and it enables a consistent comparison between the tourism industry’s contribution to GDP and that of more traditional industries such as agriculture and construction.


The TSA is mainly descriptive in nature and does not include any measurement of the indirect and induced effects of visitor expenditure on the economic system as a whole. This means that tourism’s contributions on the economy is not fully reflected in the TSA tables and must therefore be measured and analysed by other means. This can be done by TSA-based input-output tables or computable general equilibrium mode

The *Tourism Satellite Account: Recommended Methodological Framework 2008* (also known as the TSA: RMF 2008) provides the updated common conceptual framework for constructing a TSA. It adopts the basic system of concepts, classifications, definitions, tables and aggregates of the System of National Accounts 2008 (SNA 2008), the international standard for a systematic summary of national economic activity, from a functional perspective. An important milestone in the encouragement of TSAs in Europe was the EU directive on the collection of harmonised statistics on tourism (Directive 95/57/EC).

Appendix D: New Zealand Key Tourism data dissemination plan



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĀKINA WHAKATĪTIKI



Tourism data dissemination plans

OVERALL APPROACH

Our approach to data dissemination is shaped by the following analysis of audiences and their needs for different data types

Who's the audience?	What type of data?	What's the phase in the data production process?	Examples
<ul style="list-style-type: none"> • Data scientists with tools and resources to push it downstream • Econometricians with an interest in individual-level issues • Statisticians • Academics • Economists • General analysts • Consultants • Policy advisors with a numbers-bent • Larger firms • Industry bodies • Data firms seeking to add value and sell products (eg mobile apps drawing on aggregate data) • Politicians • Most policy advisors • General public and firms 	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> The source: <ul style="list-style-type: none"> • Transactional databases • Other administrative sources • Surveys </div>	COLLECT	<ul style="list-style-type: none"> • Dirty data with duplications, errors, etc and unclear relation to population it is drawn from • Twitter feed • Reporting direct from an FMIS • Survey data with one row per respondent • Finance data with one row per transaction • Published official statistics in locations like NZ.Stat, Infoshare, OECD, Yahoo Finance, etc • Unpublished data in internal reports (eg financial, HR, etc) • Sectors Reports • Regional Economic Activity Report • Wiki New Zealand
	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Raw data</div>	PROCESS	
	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Cleaned, weighted, concorded microdata</div>	PROCESS / ANALYSE	
	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Aggregate data</div>	ANALYSE / DISSEMINATE	
	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Reports, interactive tools, web pages, etc</div>		

CURRENT STATE

Overview

The tourism data are basically available but you need to know where to go. While all the data are listed and linked to from the MBIE website, there is no single format and new users would struggle to know which collection to use for what purpose. Some data sets are distributed in forms that allow easy manipulation by mid-level users (e.g. the pivot tables for the Regional Tourism Estimates) but most are not. There is limited availability of the microdata. A few innovative and well-regarded interactive tools have been built but with only limited coverage of the data.

Specifics

- <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data> functions as a sort of one stop shop, with links to the various data produced by Statistics New Zealand and those produced by MBIE. However, the organisation is by data collection



Irish Tourist Industry Confederation

Ground Floor
Unit 5, Sandyford Office Park
Dublin 18, Ireland

Tel: +353 1 293 4950

Fax: +353 1 293 4991

Email: info@itjc.ie

www.itjc.ie