

Northern Ireland Local Government District Tourism Statistics 2015

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This report provides 2015 tourism statistics for the 11 Local Government Districts (LGDs) in Northern Ireland. A number of statistics; overnight trips, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits are included. The key points are:

- the **largest number** of overnight trips in 2015 was to **Belfast** LGD (1.4 million). Three in ten overnight trips to Northern Ireland were to this area (29% of all overnight trips);
- reason for visit varies by area. Two out of three overnight trips to **Causeway Coast & Glens** LGD were for **holiday** purposes (68%);
- the two main cities, **Belfast** and **Derry/Londonderry** attract **business trips**. One in six trips to Belfast (17%) and Derry City & Strabane (16%) are for business reasons;
- **Belfast** LGD has the largest number of beds in **hotel** accommodation (7,100 beds or 41% of NI total) on average **three fifths** of these beds were fully **occupied** throughout 2015 (60% occupancy level);
- the importance of **self-catering** accommodation in **Causeway Coast & Glens** and **Fermanagh & Omagh** LGDs is clear. There are almost 7,500 self-catering beds (62%) in these two LGDs out of 12,100 self-catering beds in Northern Ireland as a whole;
- last year, the most **popular visitor attractions** included the **Giant's Causeway** (0.85 million visits), **Titanic Belfast** (0.62 million visits) and the **Ulster Museum** (0.46 million visits).

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Introduction

Northern Ireland [annual 2015 tourism statistics](#) were published on the 28th May. Tourism statistics systems are designed to collect information for Northern Ireland as a whole, however the number of trips and nights are provided by location and this information has been used to disaggregate by Local Government District (LGD). It is possible that a person could stay in one location in NI, yet day trip in another part of NI or in the Irish Republic. For example, a significant number of visitors influenced to visit NI by the Giants Causeway do not stay in the Causeway Coast and Glens LGD. For the purpose of this report, trips and expenditure associated with the trip are allocated to where the person spends the night. No single measure can be used to provide a definitive statistic on tourism. This report includes a variety of measures to paint a more complete picture. **For NI as a whole, these suggested a growth in tourism from visitors outside of the island of Ireland, alongside a fall in domestic overnight trips.**

This report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in LGDs. A primary aim is to provide information on progress towards the Programme for Government target aimed directly at tourism.

Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact. In 2015, NI hosted world sporting events such as the Irish Open in May and the opening stages of the Tall Ships in July. Local film industries, such as the Game of Thrones showcased local locations and may also have had an impact on visits to these areas.

Two key measures of tourism activity are the number of overnight trips and the associated expenditure. To estimate these measures two sets of rolling annual surveys of passengers and households are undertaken.

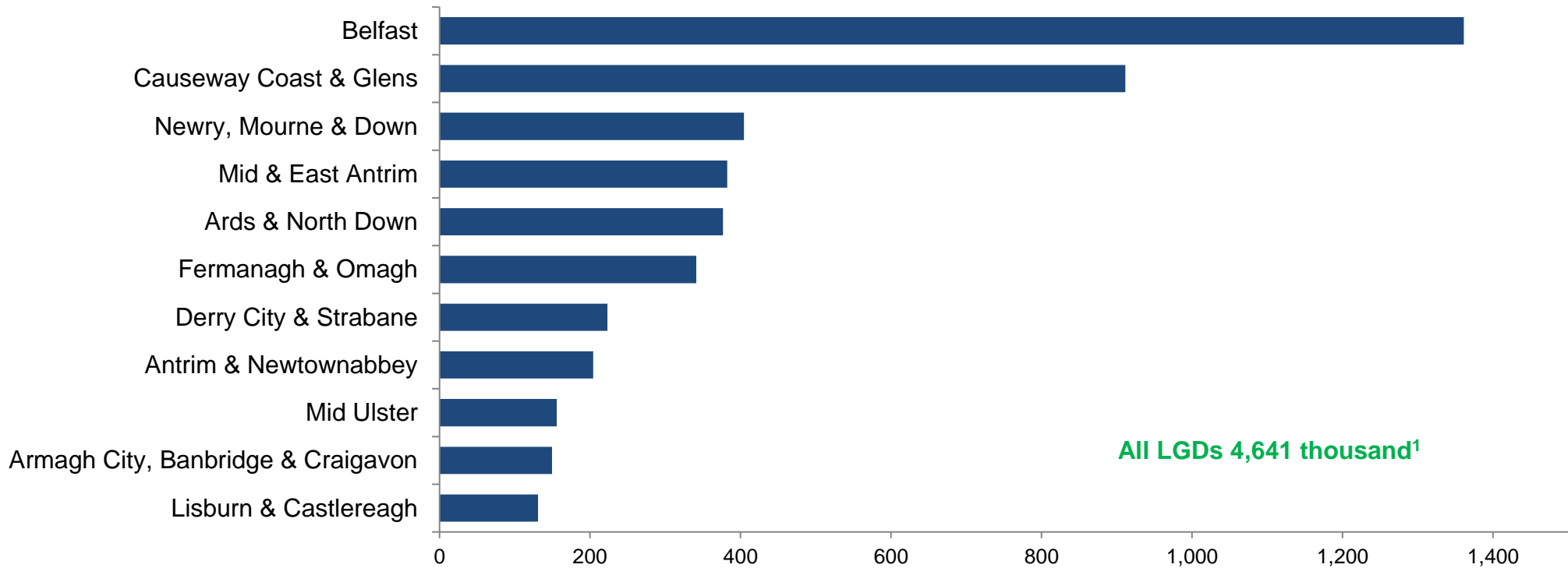
- (i) Firstly, **surveys of passengers** at air and sea ports in Northern Ireland and the Republic of Ireland are undertaken to identify overnight trips to Northern Ireland by people living outside the island of Ireland.
- (ii) Secondly **household surveys** in Northern Ireland and the Republic of Ireland are undertaken to identify Northern Ireland based overnight trips of Northern Ireland and Republic of Ireland residents.

Overnight: Headline overnight trip statistics are measured using standard United Nations (UN) definitions. The UN use the concept of “overnighting”. This is broadly defined as staying away from your usual place of residence for one night or more. This does not need to be for holiday, it can also relate to visiting relatives, business etc. As well as overnighting of visitors to Northern Ireland the statistics also include overnights of local residents within NI. Note overnighting excludes day trips, which will be a significant part of the local tourism market.

Overall volume / latest trend

- Figure 1a shows the overnight trips taken in each Local Government District and Figure 1b shows the same information by thematic map.
- Belfast experienced the highest number of overnight trips of any Local Government District during 2015, (1.4 million overnight trips or 29% of all overnight trips).
- Almost half of all overnight trips were to Belfast (29%) and the Causeway Coast & Glens (20%).

Figure 1a: Overnight Trips by Local Government District (thousands), 2015



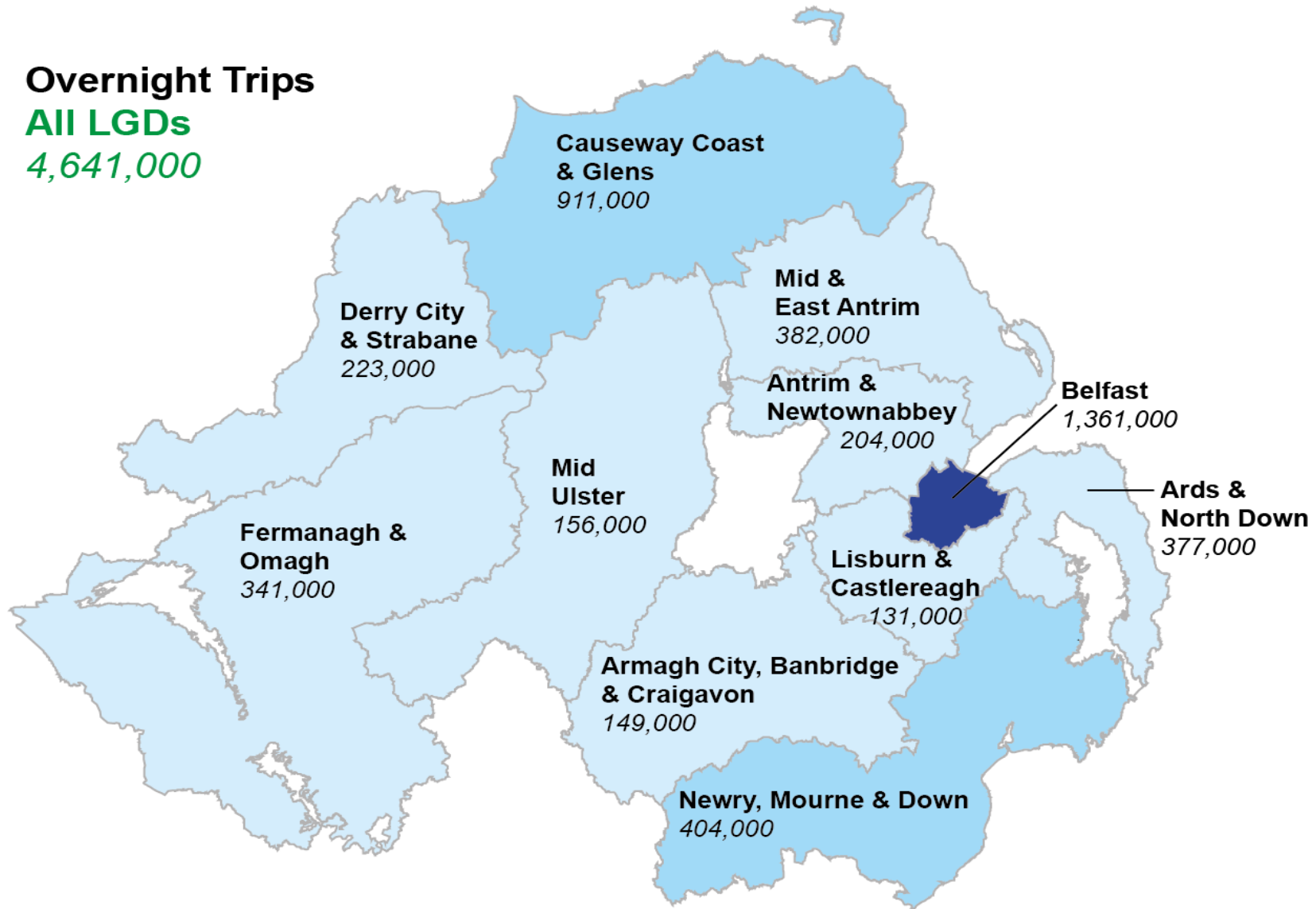
¹All LGDs: This figure (4.6 million) is higher than the Northern Ireland total (4.5million) – see [background note 5](#).

Figure 1b: Map of 2015 overnight trips by Local Government District

Overnight Trips

All LGDs

4,641,000



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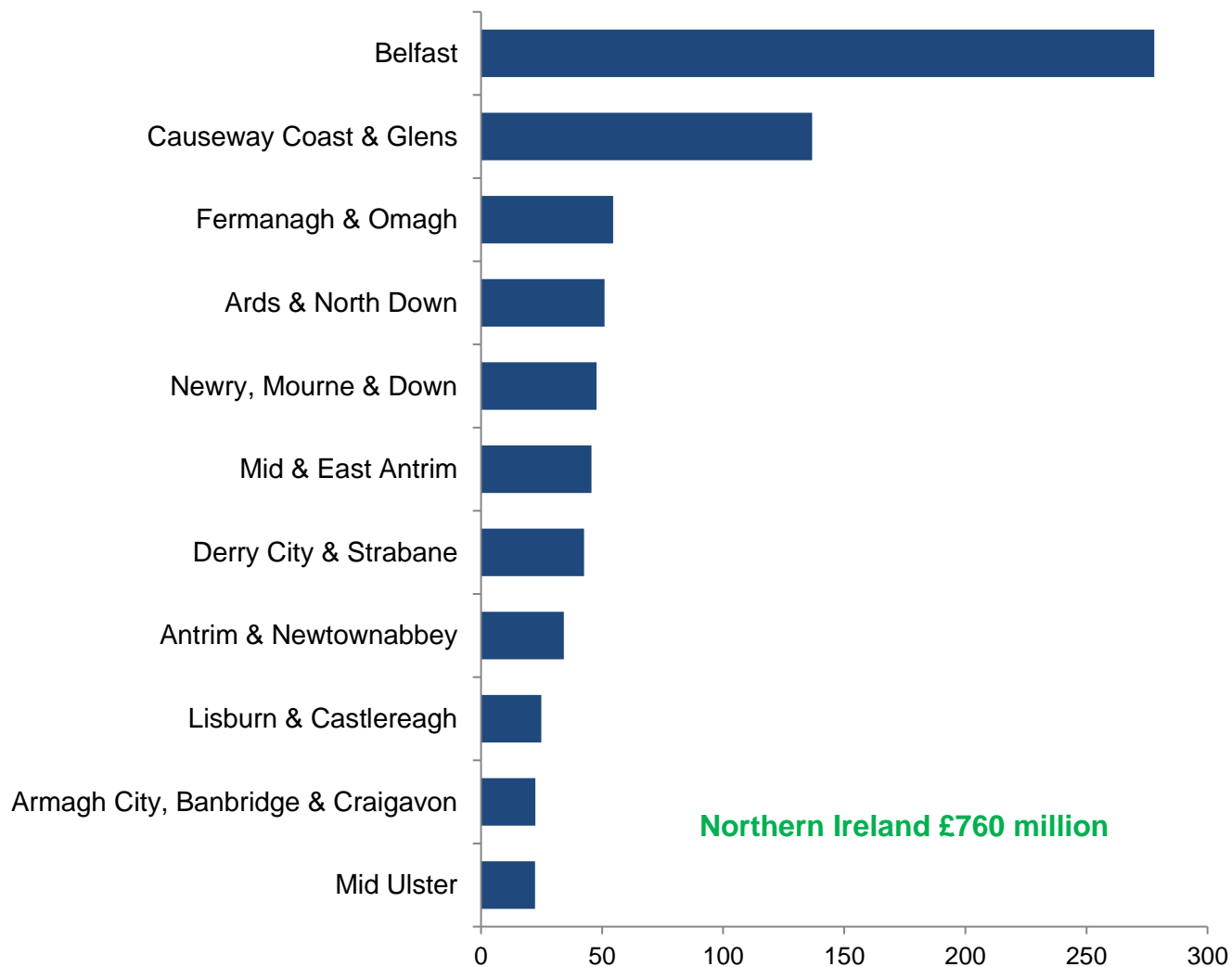
¹See [background note 5](#).

See [link](#) for data

Expenditure associated with Overnight Trips

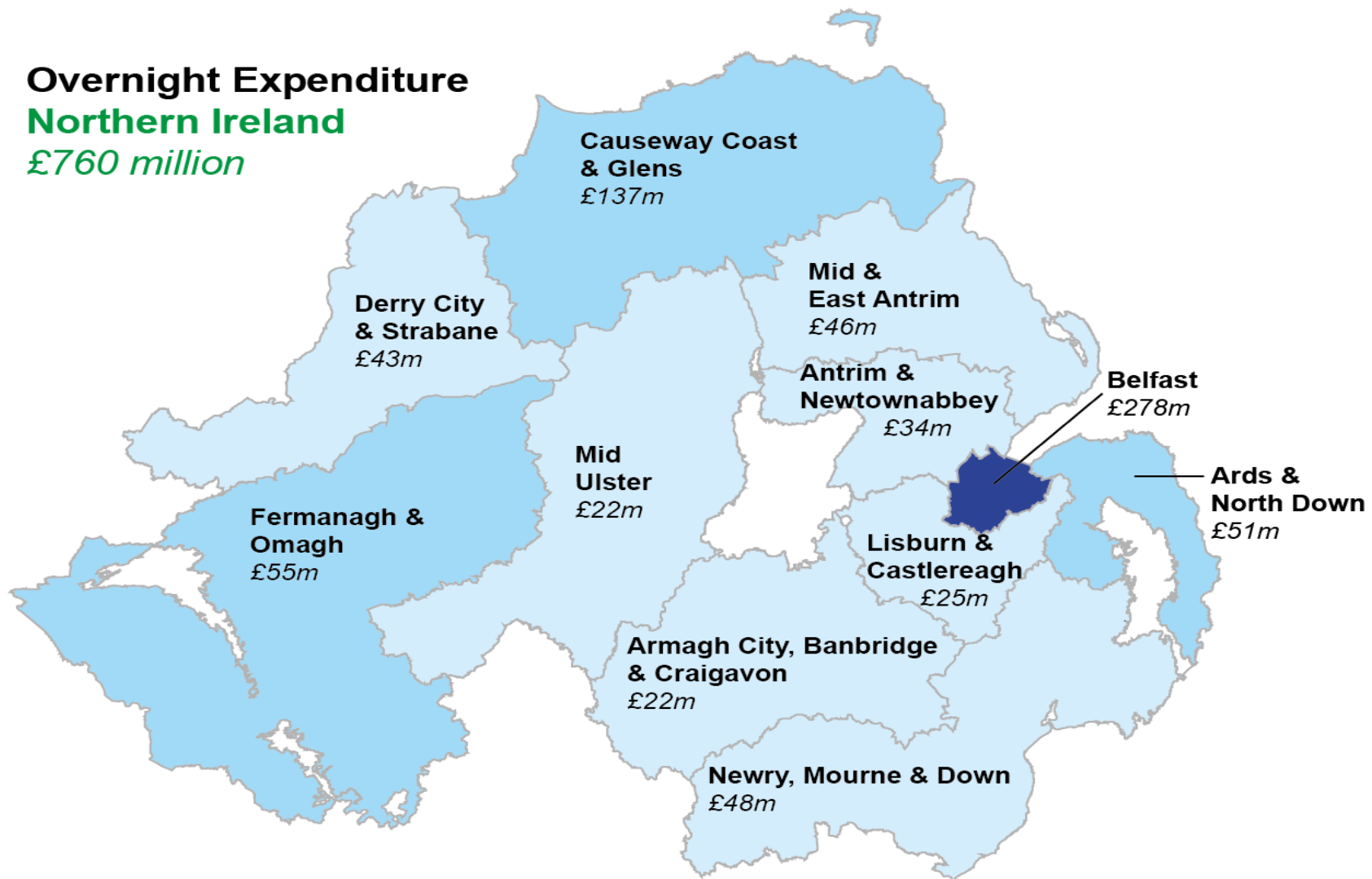
- Figure 2a shows the expenditure associated with overnight trips taken in each Local Government District (2015). This data is also shown in map form in Figure 2b.
- As would be expected, this picture broadly follows the number of overnight trips. In total £760 million was spent on overnight trips across Northern Ireland, with £278 million or 37% spent in Belfast LGD. A further £137 million (18%) was spent in Causeway Coast & Glens.

Figure 2a: Expenditure (£m) on Overnight Trips by Local Government District, 2015



See [link](#) for data

Figure 2b: Map of Expenditure (£m) on Overnight Trips by Local Government District, 2015



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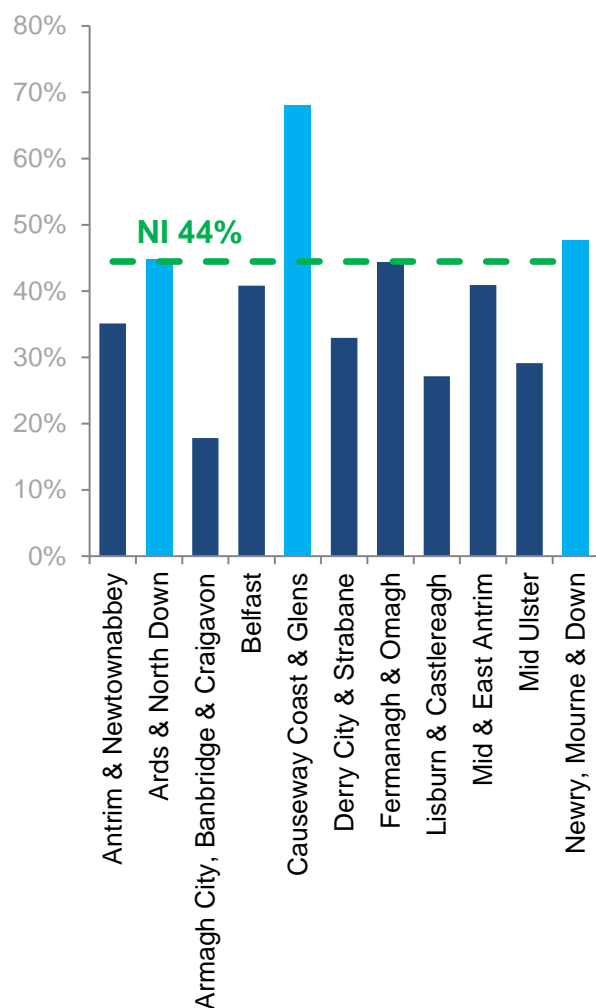
Reason for Overnight Trip

- Survey respondents are also asked the reason they stayed overnight in Northern Ireland. The results for all overnight trips regardless of place of origin¹ are shown in Figures 3a-c.
- In overall terms the three graphs show the relative importance of each sector. Overnight trips for holiday purposes makes up 44% of the Northern Ireland market, visiting friends and relatives 41% and business trips 9%. However, this masks significant local variation.
- Figure 3a shows the proportion of overnight trips in each local area that were taken for holiday/pleasure/leisure purposes. The relative importance of holiday tourism is noted in the Causeway Coast & Glens and Newry, Mourne & Down. Over the period 2013-2015, over two out of three overnight trips taken in Causeway Coast & Glens (68%) were for holiday purposes. Almost half of overnight trips in Newry, Mourne & Down were for holiday purposes (48%). A significant element of this relates to Northern Ireland residents taking holidays in typical holiday towns/areas such as Portrush, Portstewart, and Newcastle.
- In contrast, Figure 3c shows that the two main cities, Belfast and Londonderry, have a significant pull for business trips. In Belfast 17% overnight trips are for business reasons, while it is 16% in Derry City & Strabane. Indeed, of all those people taking an overnight business trip in Northern Ireland, half (50%) stay in Belfast LGD.

¹ It is important to remember that this includes overnight trips of local residents within Northern Ireland.

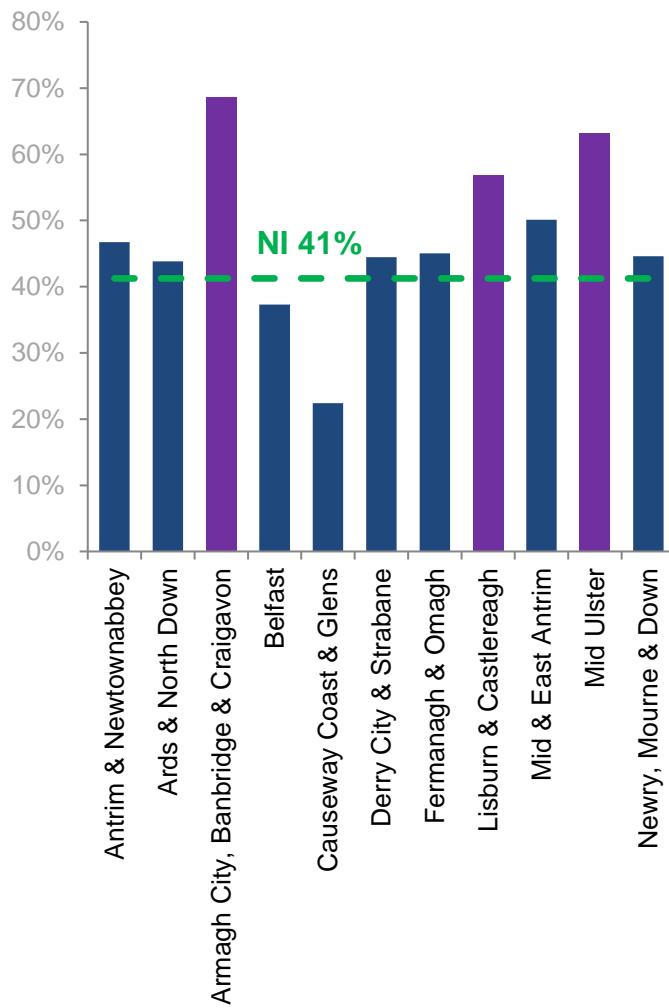
Figures 3a-c: Reason for Overnight Trip in Northern Ireland within Local Government District (3 year rolling average 2013-2015)

3a. Holiday/Pleasure/Leisure



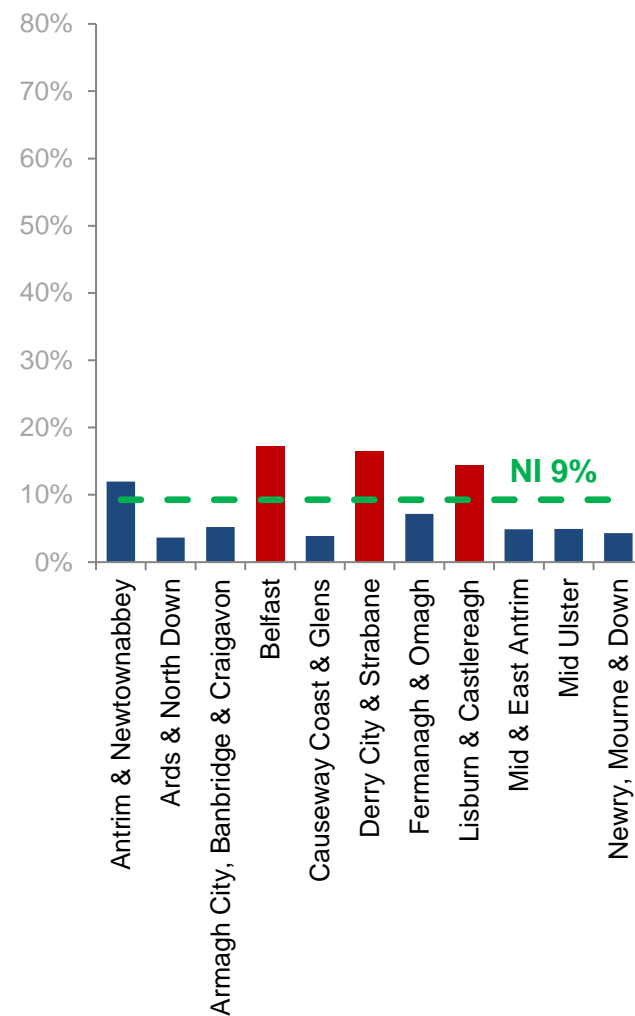
**Causeway Coast & Glens,
Newry, Mourne & Down,
Ards & North Down**

3b. Visiting Friends/Relatives



**Armagh City, Banbridge & Craigavon,
Mid Ulster,
Lisburn & Castlereagh**

3c. Business

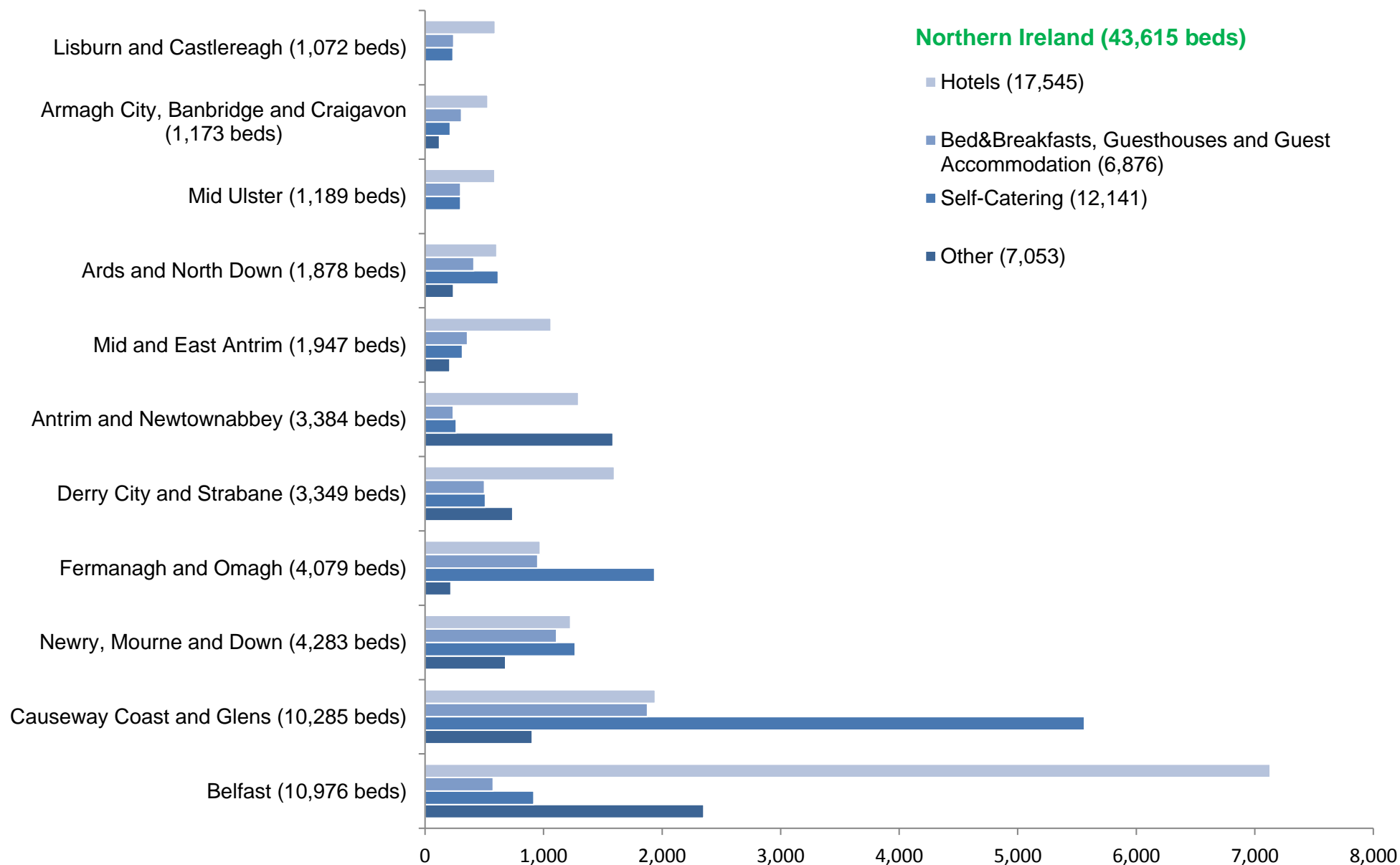


**Belfast,
Derry City & Strabane,
Lisburn & Castlereagh**

See [link](#) for data

- The availability of commercial accommodation is an indicator of the supply side of tourism. Figure 4a (overleaf) shows the volume of beds in commercial accommodation by Local Government District in 2015.
- Around half of all beds in licensed accommodation in Northern Ireland are in two LGDs - Belfast (25%) and Causeway Coast & Glens (24%). However, the makeup of the establishments within these areas differ, with Belfast having the largest number of hotel beds (7,130 beds or 41% of the Northern Ireland picture) and the Causeway Coast & Glens having the largest number of self-catering beds (5,563 beds or 46% of all self-catering beds in NI).
- The importance of self-catering accommodation in Causeway Coast & Glens and Fermanagh & Omagh LGDs is also clear. These two areas contain 62% (7,499 beds) of the self-catering beds in NI.
- While data is not available on the number of second-homes and it is difficult to measure campsites or options to pitch tents/caravans, it is estimated that 14% of all NI domestic overnight trips were to second homes and a further 11% were to campsites, caravan parks or trailer parks.

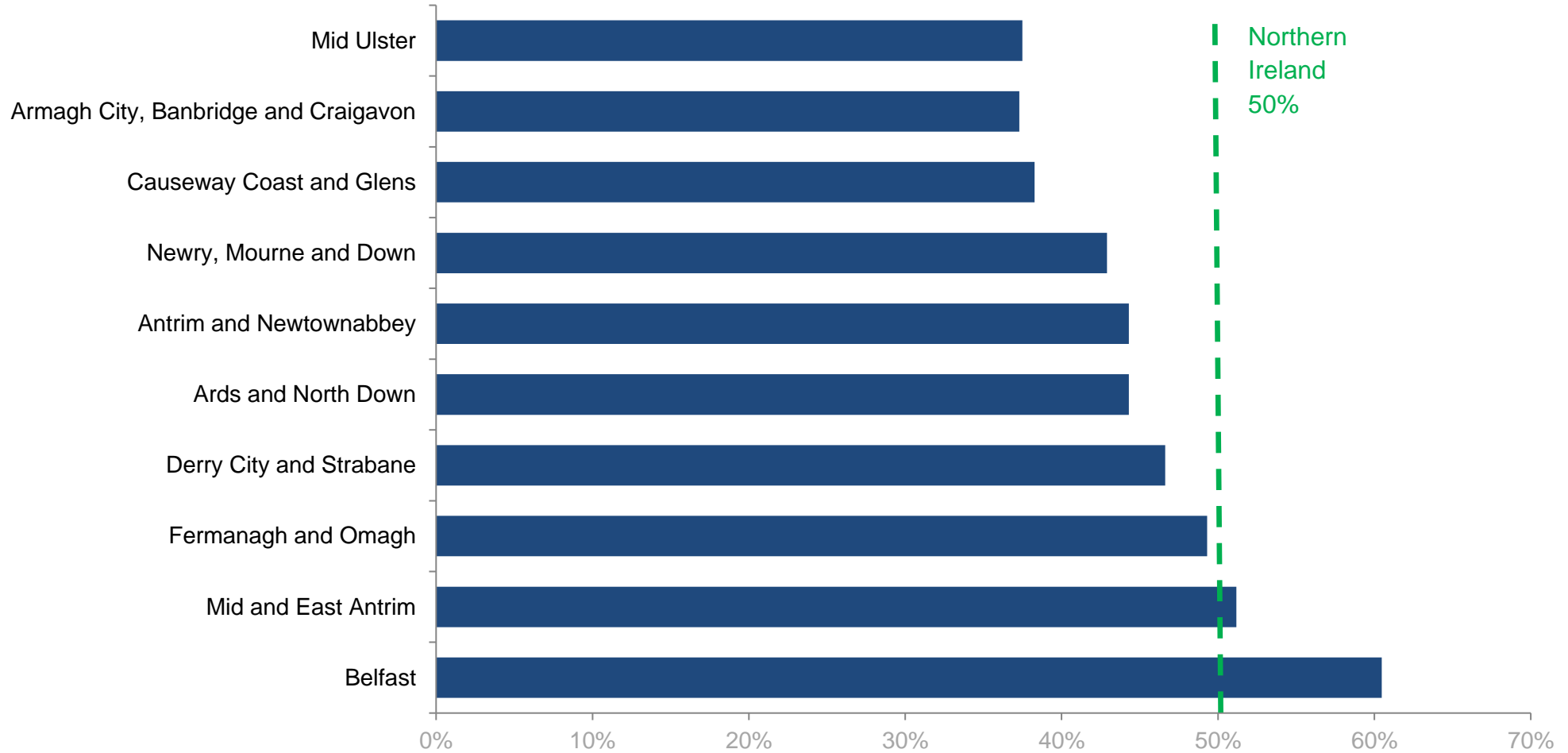
Figure 4a: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2015



See [link](#) for data

- NISRA conducts occupancy surveys of local commercial accommodation. Figure 4b shows hotel bed-space occupancy by LGD in 2015; the Figure points to Belfast, in addition to having the largest number of hotel bed-spaces, also has the highest hotel bed-space occupancy levels.

Figure 4b Bed-space occupancy of Hotels by Local Government District, 2015



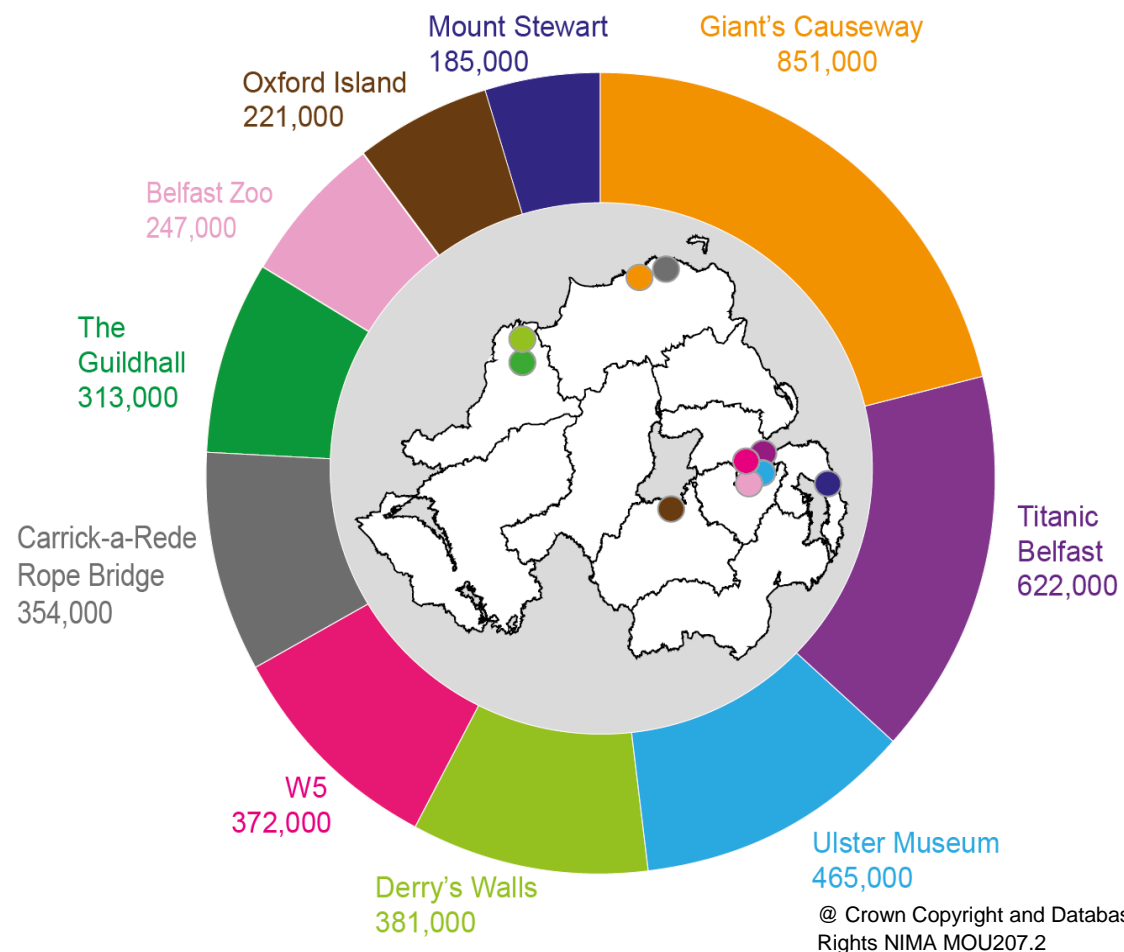
See [link](#) for data

*sample size for Lisburn & Castlereagh was too small to provide a reliable estimate

Visitor Attractions

- Visitor Attractions across Northern Ireland provide information on the number of people who visit their attractions throughout the year. Counting methods for individual attractions differ and may also change year on year which may impact on these results.
- Last year, the top visitor attractions were the **Giant's Causeway** (0.85 million visits), **Titanic Belfast** (0.62 million), the **Ulster Museum Belfast** (0.46 million) and **Derry's Walls** (0.38 million). This is shown in graphical form in Figure 5.

Figure 5: Top 10 Visitor Attractions*, 2015

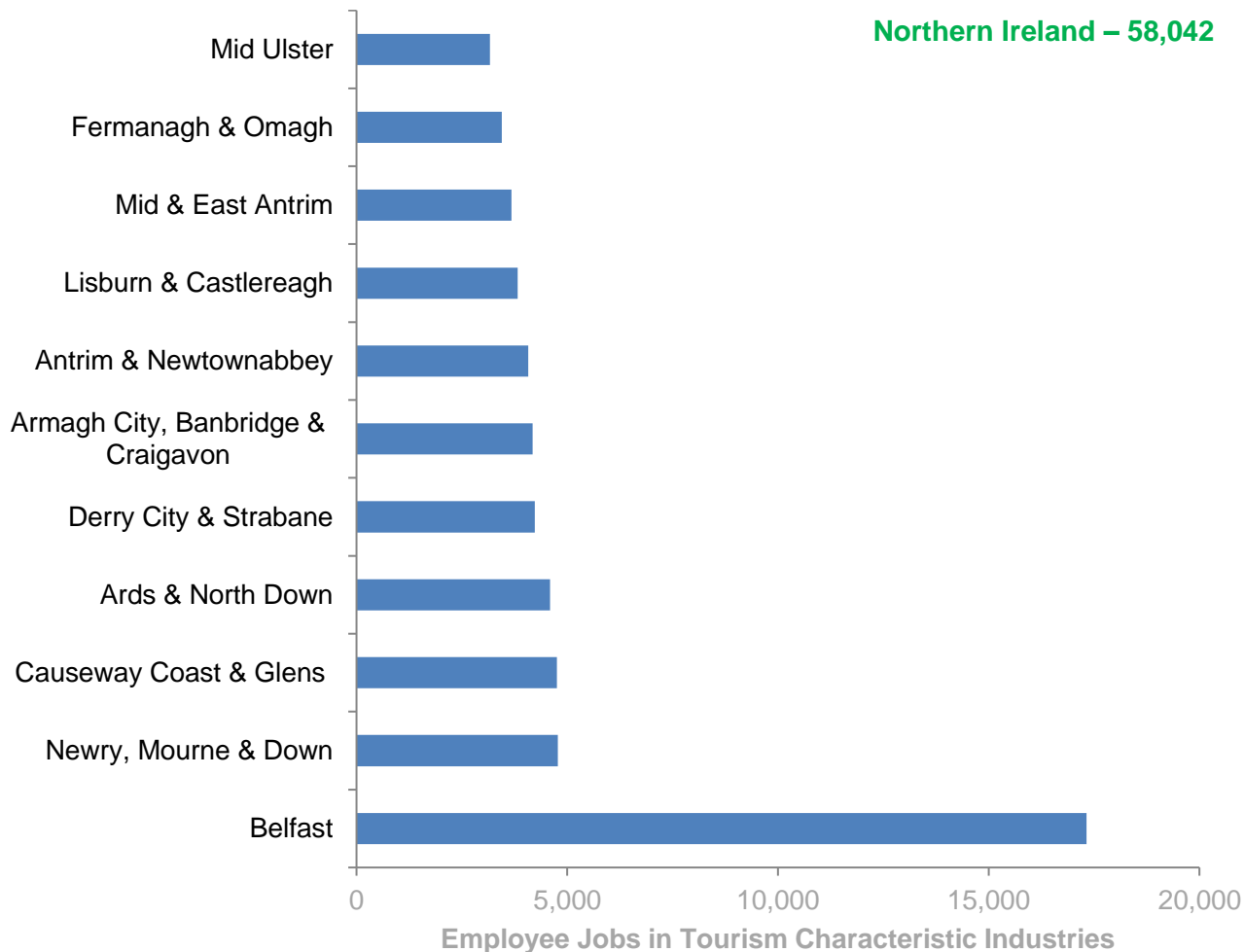


See [link](#) for data

Employee Jobs in Tourism Characteristic Industries

- Employee Jobs in tourism characteristic industries relates to a number of different business areas, most notably hotels and restaurants.
- Figure 6 gives an indication on the number of employee jobs in tourism characteristic industries in each local area. In total, in 2013 there were just under 700,000 employee jobs in Northern Ireland, of which 58,000 or 8% are in tourism characteristic industries. Within Northern Ireland, Belfast LGD accounts for 30% of the total. When looking at the relative importance of the tourism industry within local areas, Ards & North Down and Causeway Coast & Glens LGDs both have over 12% of local employment in this industry.

Figure 6: Employee Jobs in Tourism Characteristic Industries in Local Government Districts 2013



See [link](#) for data

Cruise Ships

- Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 7 shows the trend in the number of cruise ships docking at local ports – see background note 11.
- In 2015, 58 cruise ships docked in Belfast port, 6 in Londonderry port and 3 in other NI ports. The figures point to an increase in numbers of people visiting Northern Ireland from cruise ships, up from 58,000 in 2011 to 123,000 in 2015. Many cruise ship passengers will go on trips to other areas (for example from Belfast to the Giant's Causeway). However these trips are classified as day trips and are not included in the overall figures in this bulletin.

Figure 7: Total cruise ship numbers and passengers onboard docking at NI ports (2011-2015)



See [link](#) for data

Background Notes

1. This report presents a summary of 2015 tourism statistics by Local Government Districts (LGD). More detailed data are available at this [link](#).
2. Tourism data is derived from a variety of sources, more information on these sources can also be found at this [link](#). Tourism estimates are designed to provide timely data on tourism activity in Northern Ireland. The estimates may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures in this document are the most up-to-date available at the time of publication. Northern Ireland Tourism statistics have undergone a series of organisational changes and revisions to methodology. Information on the sources, the data quality of each source and any revisions or changes in methodology can be accessed at this [link](#).
3. The production of tourism statistics is conducted in line with the UK Statistics Authority [Code of Practice for Official Statistics](#). This means that the statistics
 - a. meet identified user needs,
 - b. are well explained and readily accessible,
 - c. are produced according to sound methods, and
 - d. are managed impartially and objectively in the public interest

Northern Ireland tourism statistics are currently being assessed by the UK Statistics Authority.

4. NISRA uses the Survey of Overseas Travellers run by Fáilte Ireland to gain information on the visitors who took overnight trips in Northern Ireland and exited through Republic of Ireland ports. Information on Northern Ireland overnight trips is also now collected through a separate survey carried out by Central Statistics Office Ireland. NISRA researched the two sources and presented and agreed the findings at the all Ireland tourism statistics meeting with all relevant providers and users of the data. The findings can be accessed at [link](#).
5. The 2015 Northern Ireland tourism statistics showed there were 4.5 million overnight trips, this figure is lower than the 'all LGD' total (4.6 million). The LGD figure is higher as someone may spend time in various locations during the one overnight trip to NI. For example, if

someone stayed two nights in Belfast followed by three nights in the Causeway Coast and Glens, this would be counted as one trip to Northern Ireland in the annual estimates and one trip to Belfast and one to Causeway Coast and Glens (two trips) in the LGD breakdown.

6. NISRA uses the Northern Ireland Passenger Survey to apportion the Survey of Overseas Travellers (background note 4) by Local Government District. Similarly, it uses the Continuous Household Survey to apportion the Household Travel Survey results (the HTS is carried out by Central Statistics Office to gather information on Republic of Ireland residents who overnight in Northern Ireland). The Reason for Visit results for each of these sources was applied to each of these LGD estimates.
7. Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on overnight trips in Northern Ireland of Northern Ireland residents aged under 16 are excluded. NISRA is in the process of changing the methodology of data collection to capture this information from April 2015. NISRA will explore the impact and will update users and include this group in the future. Users can see this on the Tourism Statistics Plan at this [link](#).
8. While the statistics are produced in as timely a way as possible, it is realised that early indicators would be useful. Early tourism indicators are published at this [link](#) and are updated monthly.
9. The estimates on visitor numbers, nights and spend in this bulletin are derived from sample surveys and are therefore subject to sampling errors. Sampling errors are determined both by the sample design and by the sample size. Generally speaking, the larger the sample supporting a particular estimate, the smaller the associated sampling error. Confidence intervals around the estimates of all overnight trips in Northern Ireland in 2015 stands at +/- 7% for the year (associated expenditure at +/- 11%). Note: based on the survey design confidence intervals for domestic tourism trips stands at +/-10% and external trips at +/-5%. Information on confidence intervals in Northern Ireland tourism statistics can be accessed at this [link](#).
10. This report includes estimates from Census of Employment on the number of jobs in 'tourism characteristic industries'. The latest tourism characteristic industries breakdown available is for 2013 as the Census of Employment is carried out every two years. More information on

the Census of Employment and the associated methodology can be accessed at this [link](#) .

11. The vast majority of cruise ships visit Northern Ireland on a single day basis, docking in the morning and then leaving in the evening. Thus under UN definitions cruise ship visits are considered day-trips and excluded from the overnight trips figures outlined in section 1. To address this, statistics from [Visit Belfast](#), [Cruise North West](#) and Newry & Mourne Council relating to Warrenpoint port are included. Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (Bangor & Portrush)-these figures have been included using information from Quay Marinas (Bangor) and Causeway Coast & Glens (Portrush).

12. Follow NISRA on [Twitter](#) and [Facebook](#).

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