

Northern Ireland Local Government District Tourism Statistics 2016

Published 6 July 2017



4.7m
LGD trips



15.2m
nights



£851m
spent

This report provides 2016 tourism statistics for the 11 Local Government Districts (LGDs) in Northern Ireland. The report provides a variety of estimates including; overnight trips and the associated number of nights and expenditure, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits. The key points are:

- the **largest number** of estimated overnight trips in 2016 was to **Belfast** LGD (1.5 million). Approximately three in ten overnight trips to Northern Ireland were to this area (31% of all overnight trips);
- reason for visit varies by area. The estimates show that 73% of overnight trips to **Causeway Coast & Glens** LGD were for **holiday** purposes, whilst 72% of overnight trips to **Armagh City, Banbridge & Craigavon** LGD were for **visiting friends and relatives**;
- **Belfast** and **Antrim & Newtownabbey** attract the bulk of **business trips**; accounting for approximately 16% of the overnight trips to **Belfast** and **Antrim & Newtownabbey** LGD's;
- **Belfast** LGD has the largest number of rooms in **hotel** accommodation (3,437 rooms or 43% of NI total), with an estimated 79% room occupancy level throughout 2016;

Taken together with other data sources and over the longer time period, statistical estimates point towards an upward trend in tourism activity in Northern Ireland between 2011 and 2016. This may not be the case for each Local Government District, and all available sources should be observed together to provide a fuller picture and indication of tourism activity at LGD level.

[Click here for definitions of tourism statistics common terms used in this report](#)

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National Statistics Status

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Official Statistics. They are awarded National Statistics status following an assessment by the Office for Statistics Regulation. The Office for Statistics Regulation considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is NISRA's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Office for Statistics Regulation. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.



Accuracy and reliability of survey estimates

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 sample 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.

The sample surveys capture information from a subset of the population, in order to estimate the headline statistics of overnight trips, associated nights and expenditure as well as other informative statistics of the whole population. The results from sample surveys are always estimates and not precise figures. This means that they are subject to margins of error which can have an impact on how the estimates should be interpreted, especially regarding comparisons over the short term.

The estimates presented in this bulletin (overnight trips, nights and expenditure by Local Government District) should be treated as a guide to the spread of tourism throughout Northern Ireland. Any changes in estimates for a particular LGD are usually less than the margins of error and, as such, any short term change would not be seen as statistically significant. Estimates should not be compared over short periods of time or year on year, but rather be looked at over longer periods of time and be seen only as an indication, providing an overview into the patterns and trends from a variety of sources of tourism activity in the Local Government Districts throughout Northern Ireland. These estimates should also be considered alongside other sources, where available, to give a fuller picture.

For example, based on the estimates of tourism statistics produced at LGD level, it would not be correct to say that there has been an increase in the number of overnight trips in Lisburn & Castlereagh LGD by 30%, from 131,121 in 2015 to 169,913 in 2016.

A better use of the estimates would be to say, for example, that looking at the estimated number of overnight trips to Northern Ireland over time (2011 to 2016), on average, Lisburn & Castlereagh LGD accounts for an estimated 3% (0.15 million) of all overnight trips per year in Northern Ireland.

Users should note that over the period of 2011 to 2016, there was no statistically significant change in the number of overnight trips or associated expenditure at a NI level. This report will show confidence intervals around overnight trips and expenditure and aim to guide users as to how this can be best interpreted. Further information regarding confidence interval limits can be found in [background note 9](#).

Introduction

Northern Ireland's [annual 2016 tourism statistics](#) were published on the 25th May 2017. Whilst tourism statistics systems are designed to collect information for Northern Ireland as a whole, the number of trips and nights are provided by location and this information has been used to disaggregate estimates by Local Government District (LGD). It should be noted that 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. In this report, trips and expenditure associated with the trip are allocated to where the person spends the night. Given that 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 estimates 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.

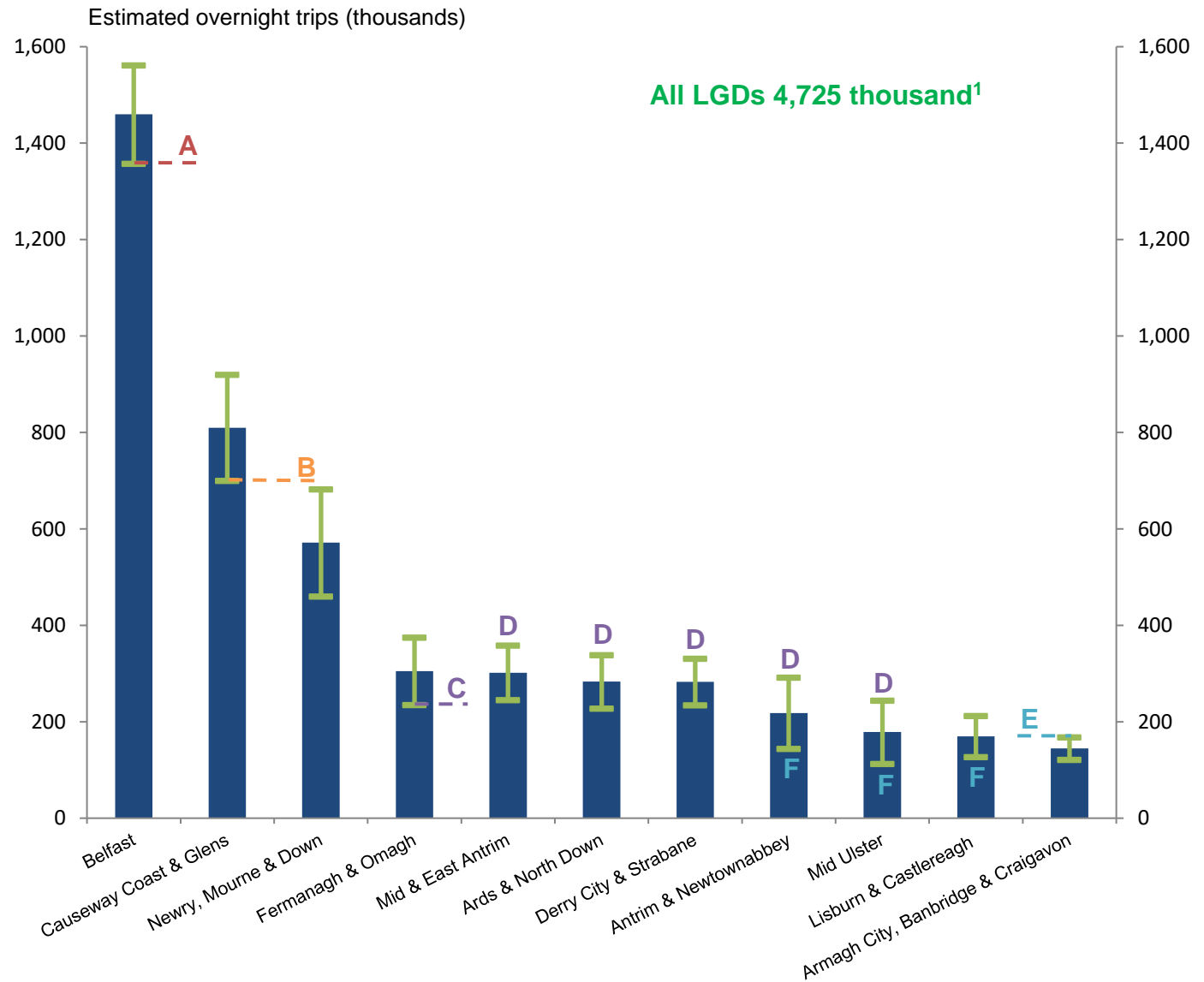
Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact. In 2016, visitors may have been influenced to come to Northern Ireland by local visitor attractions, such as the Giant's Causeway and Titanic Belfast – which won 'World's Leading Tourist Attraction' at the World Travel Awards in 2016. The local film industry with 'Game of Thrones' showcasing local locations may also have had an impact on visits to these areas.

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.

Estimated Overall volume / latest trend

- Figure 1a shows the estimated overnight trips taken in each Local Government District, including upper and lower limits. Further information on confidence intervals can be found on this [link](#). Figure 1b shows the estimated overnight trips by thematic map.
- Estimates suggest that Belfast LGD experienced the highest number of overnight trips of any Local Government District during 2016 (1.5 million overnight trips). It can be seen in Figure 1a (point A) that the lowest limit of the estimate of trips to Belfast LGD is above the higher limit for any other LGD. Therefore, this is statistically significant and it can be said that Belfast LGD has the highest number of overnight trips of all LGDs in Northern Ireland.
- Similarly, Causeway Coast & Glens LGD has a higher lower limit (Figure 1a point B) than the higher upper limit of those LGDs with fewer overnight trips. It can be said that Causeway Coast & Glens has the second highest number of overnight trips of all LGDs in Northern Ireland.

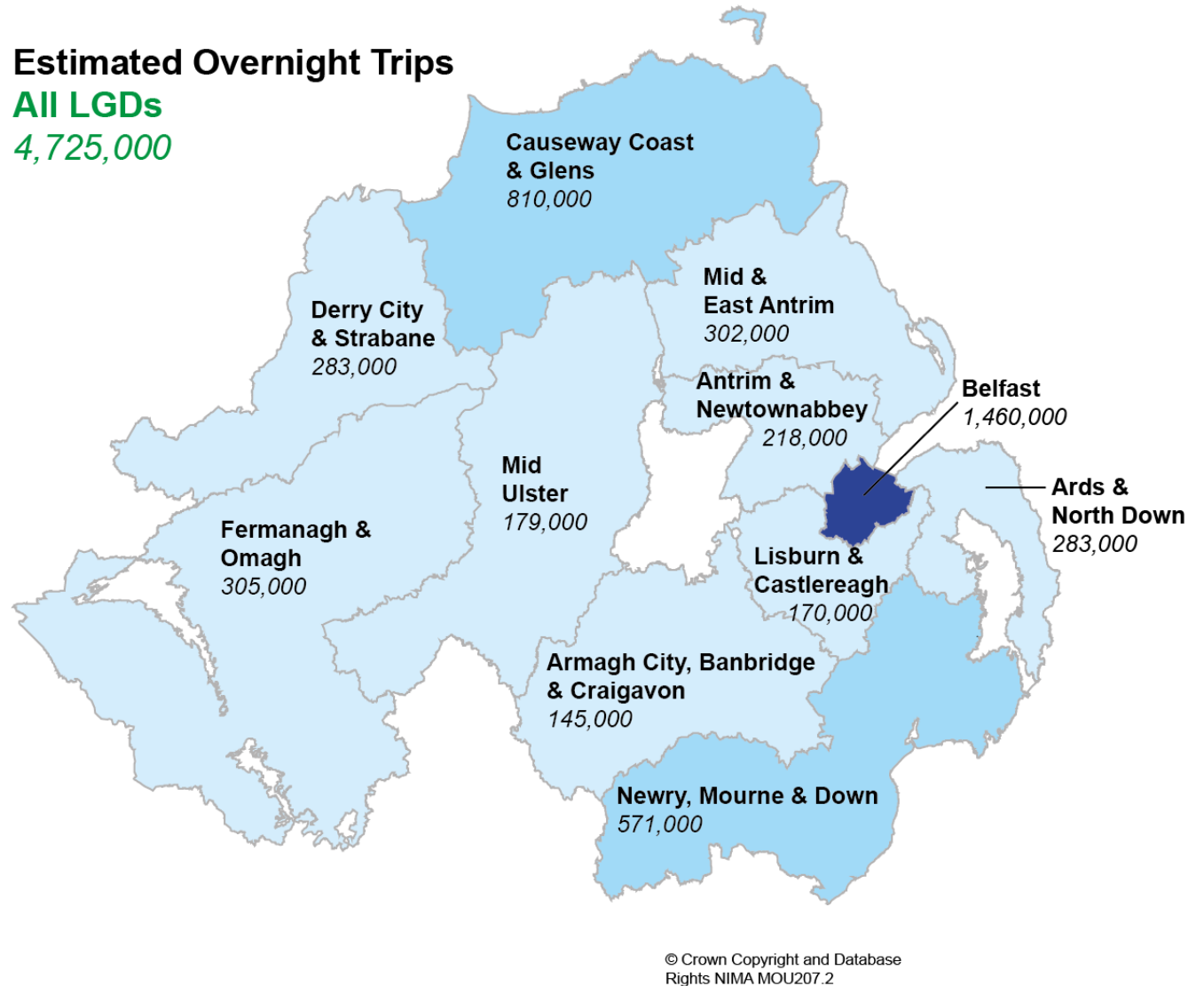
Figure 1a: Estimated Overnight Trips by Local Government District (thousands), 2016



¹All LGDs: This figure (4.7 million) is higher than the Northern Ireland total (4.6 million) – see [background note 5](#).

- However, in the example of Fermanagh & Omagh LGD, whilst the estimated number of overnight trips is higher than that of the estimated overnight trips for Mid & East Antrim, through to Mid Ulster LGDs, the lower limit (Figure 1a point C) overlaps with the higher limits of these five LGDs (Figure 1a points D). Therefore it cannot be said for certain that Fermanagh & Omagh LGD has the third highest volume of overnight trips of all LGDs in NI, though the published best estimates may suggest this.
- Estimates suggest that Armagh City, Banbridge & Craigavon LGD has the lowest volume of overnight trips (145,000). However the upper limit (Figure 1a point E) overlaps with the lowest lower limits of Lisburn & Castlereagh, Mid Ulster and Antrim & Newtownabbey LGDs (Figure 1a points F). So, taking the confidence limits into consideration, it cannot be said for certain that Lisburn & Castlereagh LGD actually has the lowest volume of overnight trips of all LGDs in NI, though the published best estimates suggest this.

Figure 1b: Map of 2016 estimated overnight trips¹ by Local Government District



¹ All LGDs: This figure (4.7 million) is higher than the Northern Ireland total (4.6 million) – See [background note 5](#).

Estimated expenditure associated with Overnight Trips

- Figure 2a shows the estimated expenditure associated with overnight trips taken in each Local Government District (2016). This data is also shown in thematic map form in Figure 2b.
- As would be expected, this picture broadly follows the pattern of estimated number of overnight trips. In total £851 million was spent on overnight trips across Northern Ireland, with £334 million or 39% spent in Belfast LGD. An estimated further £138 million (16%) was spent in Causeway Coast & Glens LGD.
- Although there have been fluctuations over time in estimated expenditure in each LGD, it should be noted that over the long term estimated expenditure has remained relatively constant at both NI and LGD level.

Figure 2a: Estimated expenditure (£m) on Overnight Trips by Local Government District, 2016

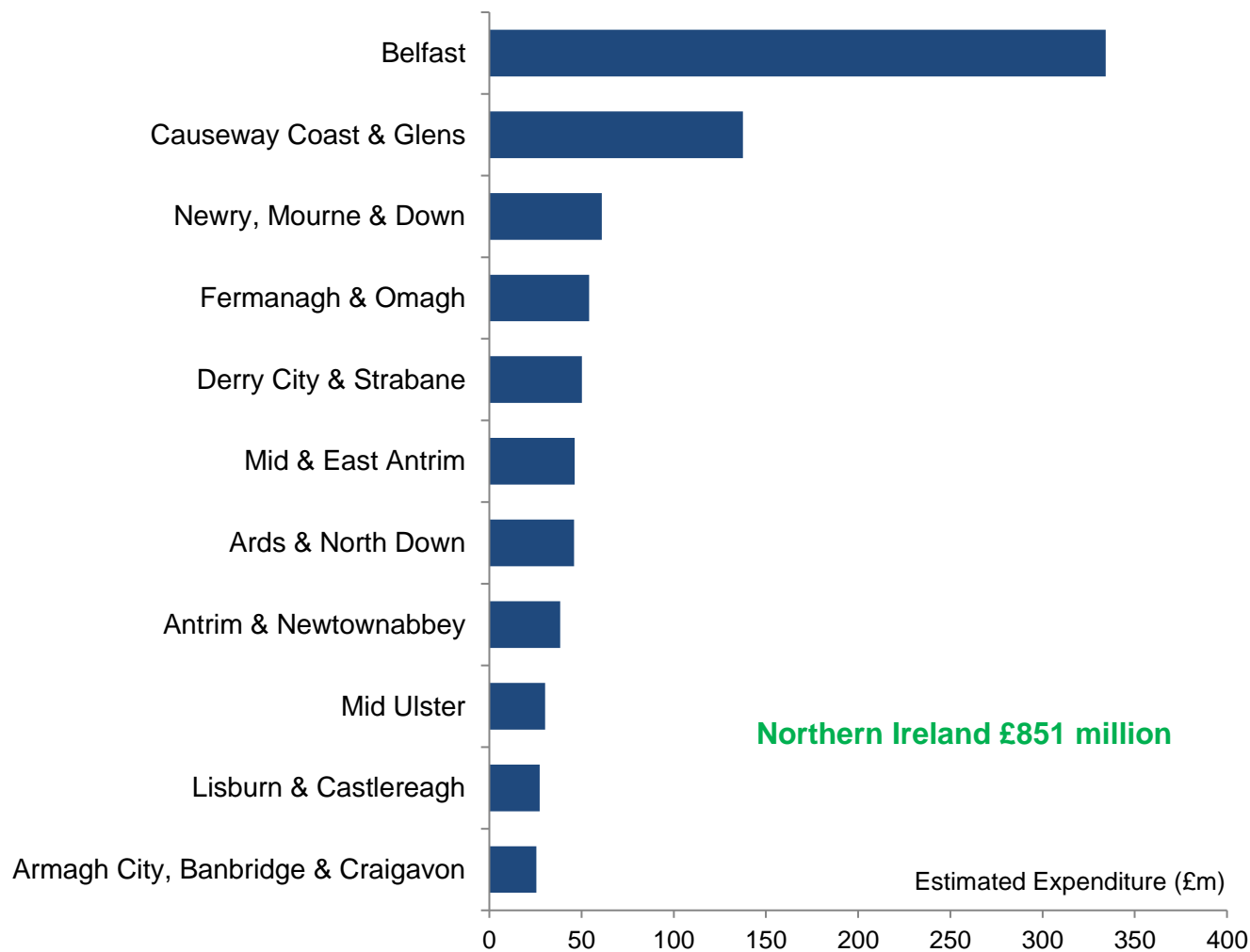
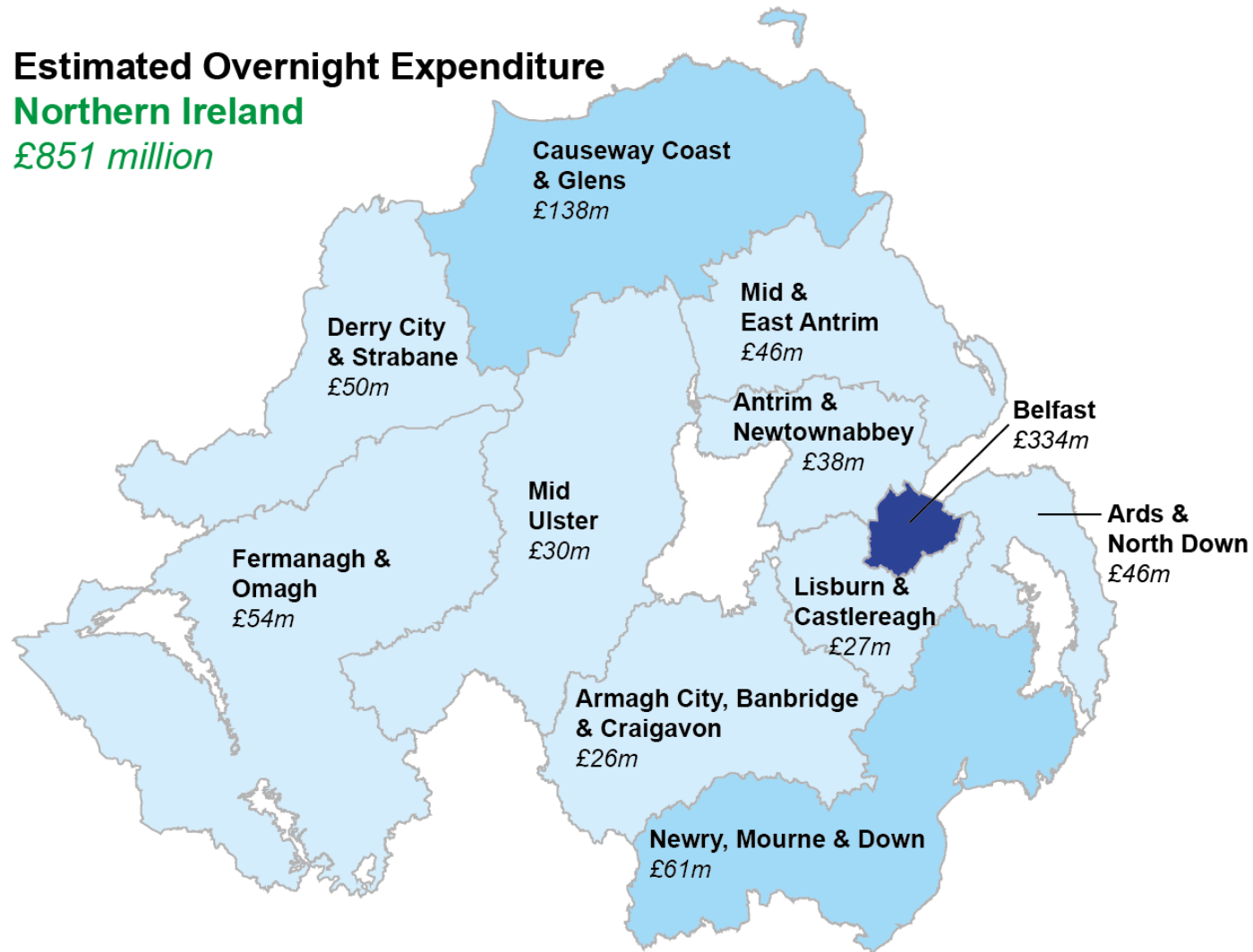


Figure 2b: Map of Estimated Expenditure (£m) on Overnight Trips by Local Government District, 2016



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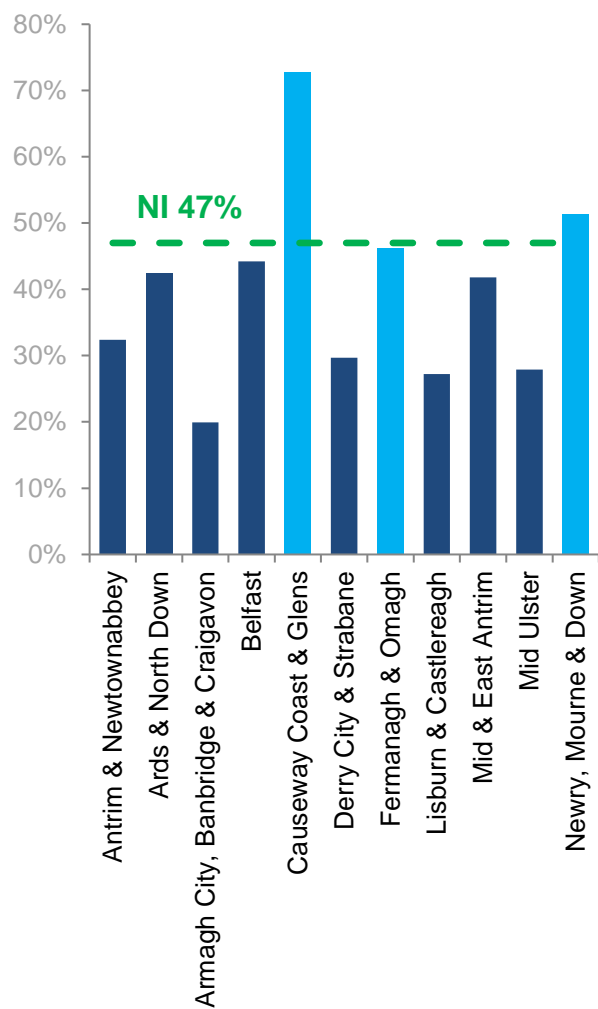
See [link](#) for data

Reason for Overnight Trip

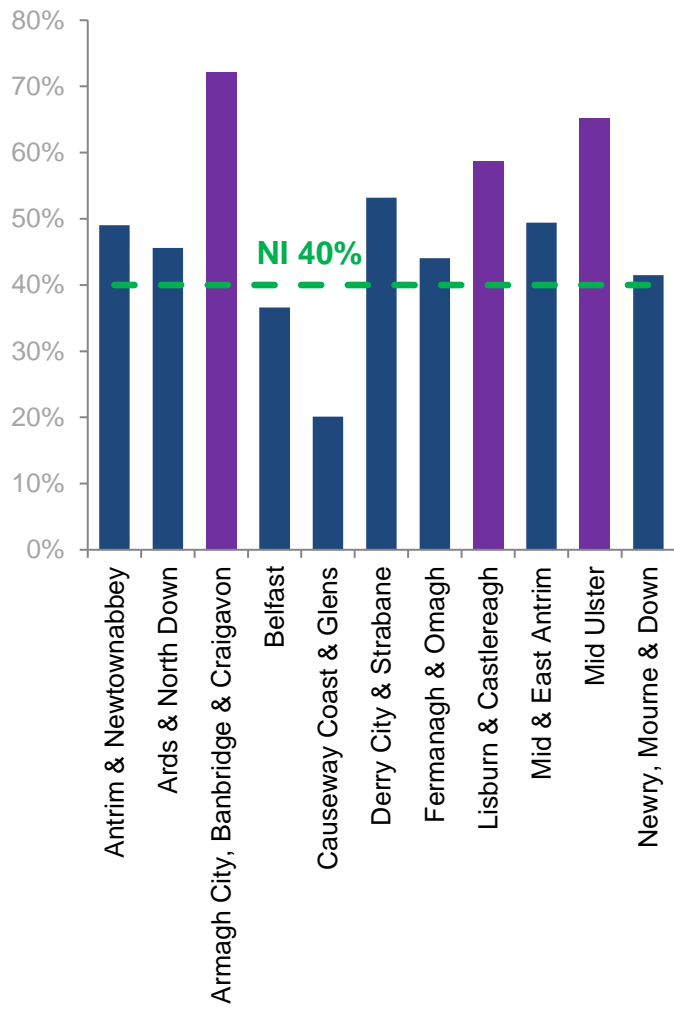
- Survey respondents are also asked the reason they stayed overnight in Northern Ireland. The estimates for all overnight trips regardless of place of origin¹ are shown in Figures 3a-c. Users should note that these estimates are provided using a three year average; the surveys are designed to collect information at NI level, and to further break these estimates out by LGD and reason for visit reduces cell sample size greatly causing more volatility in the estimates. The three year average provides an indication of the pattern of reason for visit for each LGD and should not be used as a basis for making comparisons over short time periods.
- In overall terms the three graphs show the relative importance of each sector. Estimates suggest overnight trips for holiday purposes makes up 47% of the Northern Ireland market, visiting friends and relatives 40% and business trips 9%. However, this masks significant local variation.
- Figure 3a shows the estimated 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 LGDs. Over the period 2014-2016, over two out of three estimated overnight trips taken in Causeway Coast & Glens LGD (73%) were for holiday purposes. Just over half of estimated overnight trips in Newry, Mourne & Down LGD were for holiday purposes (51%). 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 Belfast and Antrim & Newtownabbey LGDs have a significant pull for business trips. Estimates show that an estimated 16% of overnight trips to Belfast and Antrim & Newtownabbey LGDs are for business reasons. Indeed, of all those people taking an overnight business trip in Northern Ireland, over half (52%) stay in Belfast LGD.

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

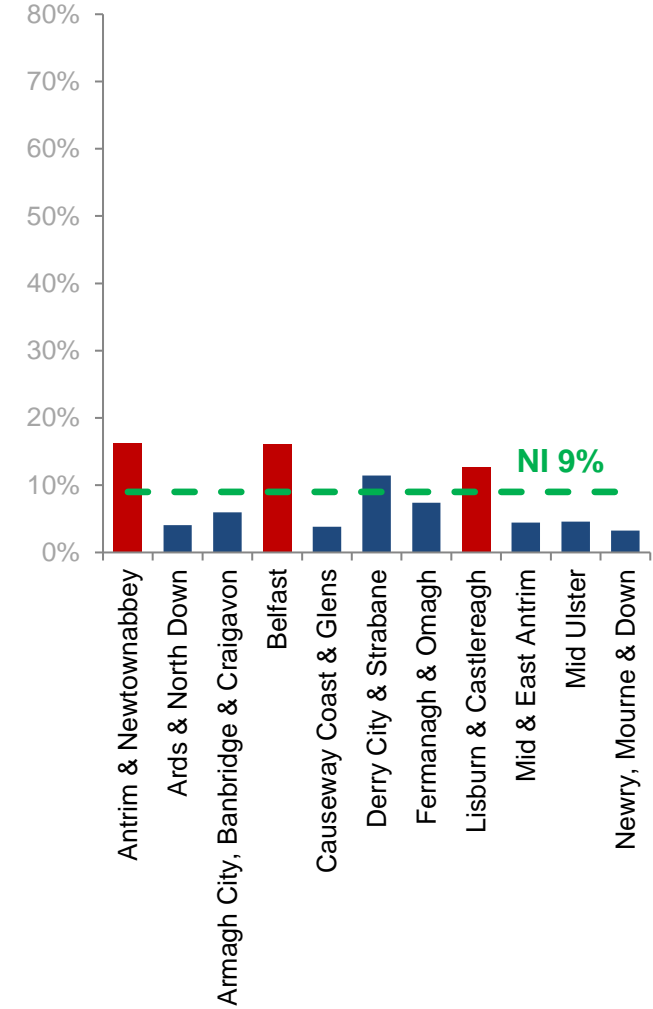
Figures 3a-c: Estimated Reason for Overnight Trip in Northern Ireland within Local Government District (3 year rolling average 2014-2016) 3a. Holiday/Pleasure/Leisure 3b. Visiting Friends/Relatives 3c. Business



Causeway Coast & Glens,
Newry, Mourne & Down,
Fermanagh & Omagh



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



Antrim & Newtownabbey,
Belfast,
Lisburn & Castlereagh

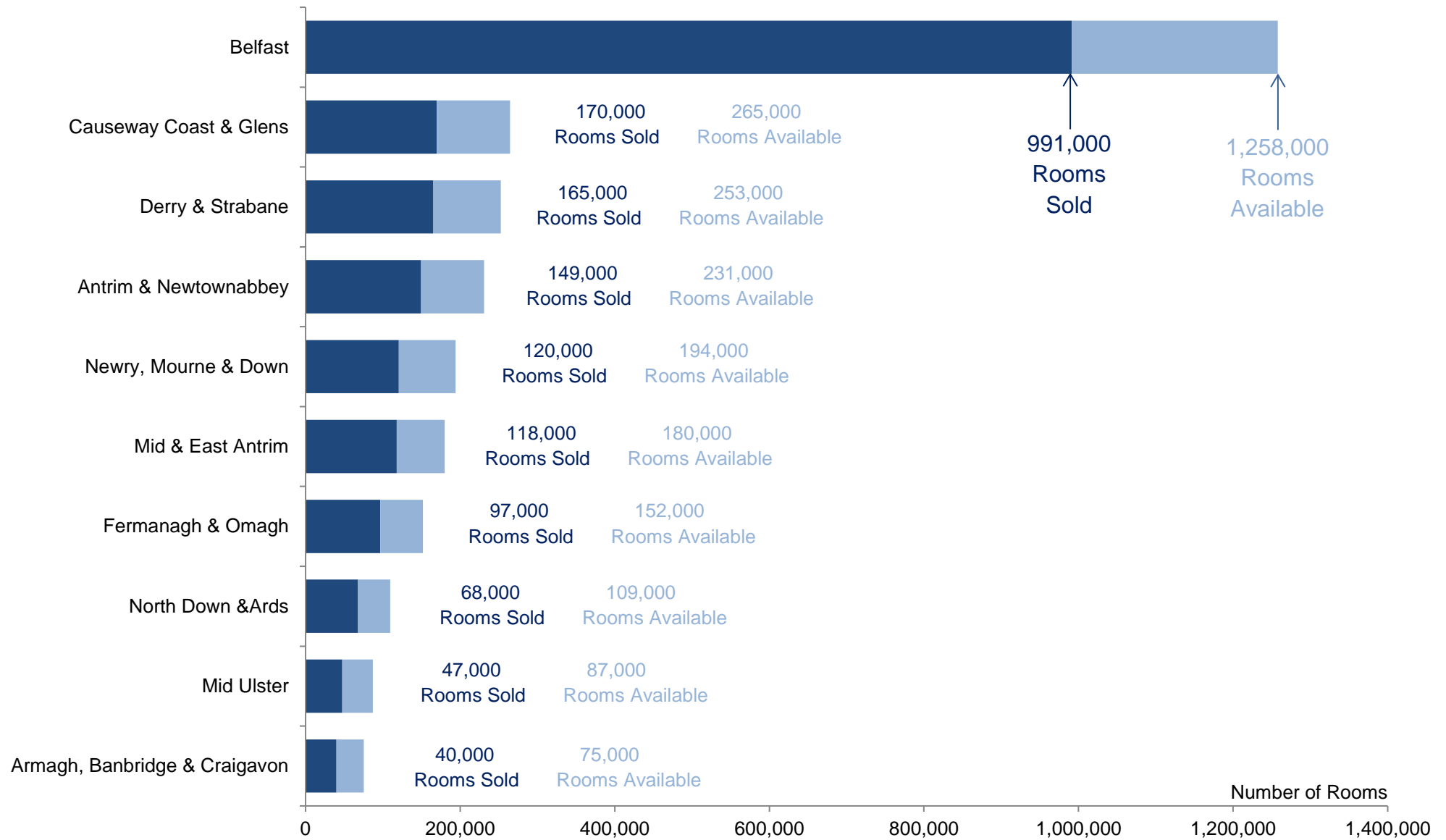
See [link](#) for data

Hotel Accommodation Occupancy

NISRA conducts a monthly occupancy survey of local hotels (and other commercial accommodation e.g. bed & breakfasts, guest houses and guest accommodation). The number of room nights sold in hotel accommodation is seen as a good indicator of how tourism is performing in Northern Ireland, and can be broken out by Local Government District.

- The availability of hotel accommodation is an indicator of the supply side of tourism. Figure 4 (overleaf) shows the volume of rooms available in hotel accommodation by LGD in 2016.
- Figures for 2016 show the estimated number of hotel room nights sold was 2.02 million, or 70% of all hotel rooms were occupied; this total is broken out by LGD in Figure 4.
- Over two fifths (43%) of all available hotel room nights are in Belfast LGD, and estimates show that almost one in every two hotel room nights sold in Northern Ireland are in Belfast LGD.
- Reflecting other NISRA tourism statistics and external sources (see point below), estimates would suggest that there has been a general increase between 2011 and 2016 in the number of hotel rooms sold in Northern Ireland; however, this may not necessarily be the case in every LGD, with possible fluctuations for individual LGDs due to local events in particular years or other external factors such as exchange rates.
- Other research companies carry out occupancy surveys throughout NI. While the results are slightly different to NISRA results - (tend to be higher occupancy rates) the trend remains the same. The reason the results are higher may be due to the respondents. The other surveys tend to sample larger hotels with higher star ratings; whereas NISRA undertake a census of all hotels, however, not all hotels respond.

Figure 4: Number of Rooms Available and Estimated Number of Rooms Sold in Hotel Accommodation by Local Government District, 2016



See [link](#) for data

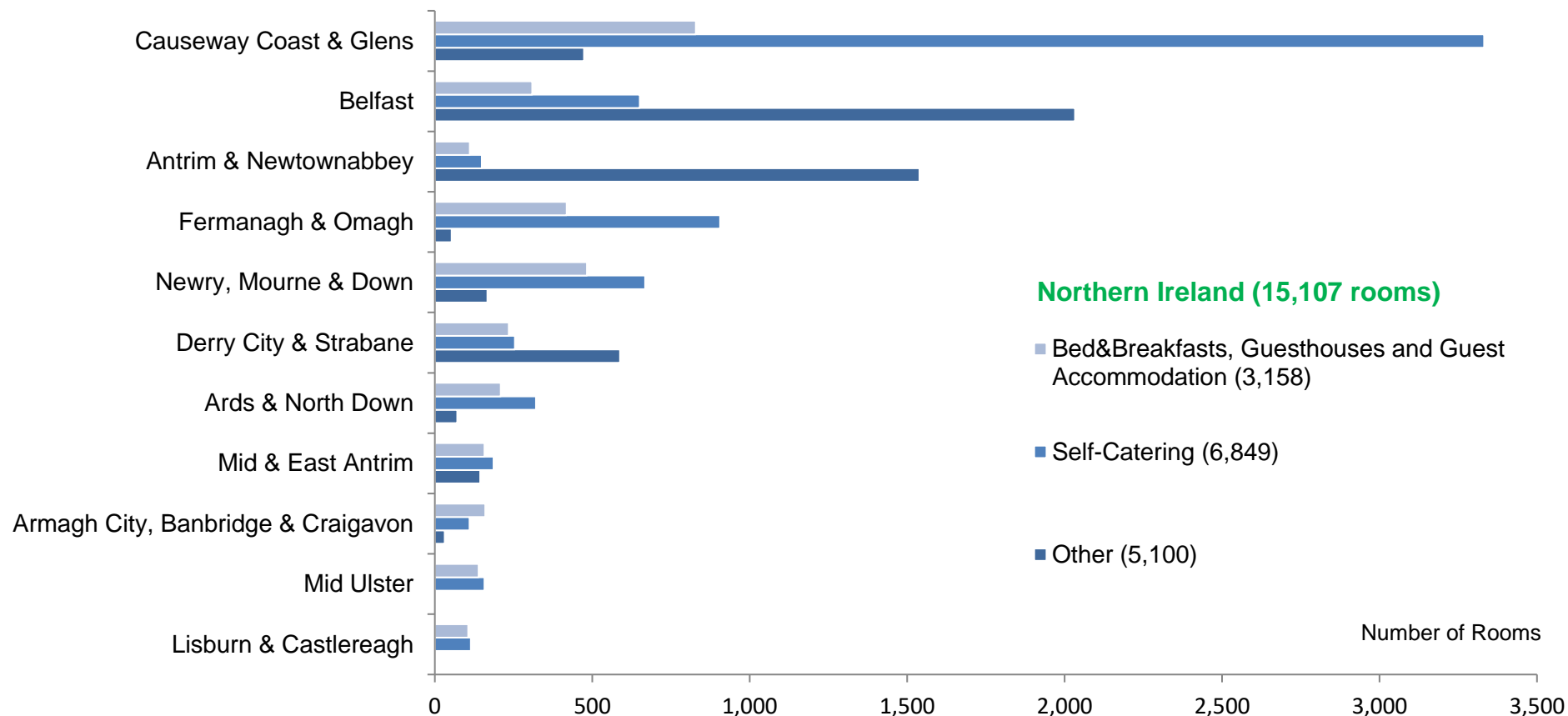
*sample size for Lisburn & Castlereagh was too small to provide a reliable estimate

To provide a further picture of tourism supply, NISRA conducts monthly occupancy surveys of Guest House, Bed & Breakfast and Guest Accommodation establishments as well as annual surveys regarding the occupancy of Self Catering establishments and visits to all Visitor Attractions in Northern Ireland. Users should note that response rates to these surveys are low and varied and should be treated with caution. Collection methods of the number of visits in the Visitor Attraction Survey differ – more information can be found in the [Visitor Attraction Survey](#) satellite report. Results from these surveys are classed as Official Statistics, further information on [Official Statistics](#) can be found on the [NISRA website](#).

Guesthouse, Bed & Breakfast, Guest Accommodation and Self Catering Occupancy

- The availability of other commercial accommodation is also seen as an indicator of the supply side of tourism. Figure 5 (overleaf) shows the volume of rooms in commercial accommodation by Local Government District in 2016.
- Around half of all rooms in other licensed accommodation in Northern Ireland are in two LGDs - Causeway Coast & Glens (31%) and Belfast (20%). However, the makeup of the establishments within these areas differs, with Belfast LGD having the largest number of campus rooms (1,900 rooms or 42% of the Northern Ireland total) and the Causeway Coast & Glens LGD having the largest number of self-catering rooms (3,332 rooms or 49% of all self-catering rooms in NI).
- The importance of self-catering, guesthouse, bed & breakfast and guest accommodation in Causeway Coast & Glens and Fermanagh & Omagh LGDs is also clear. These two areas contain 62% (4,238 rooms) of the self-catering rooms and 40% (1,248 rooms) of the guesthouse, bed & breakfast and guest accommodation 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 from the Continuous Household Survey that 12% of all NI domestic overnight trips were to second homes and a further 10% were to campsites, caravan parks or trailer parks during 2016.

Figure 5: Number of Rooms available in other Licensed Accommodation by Accommodation Type and Local Government District, 2016



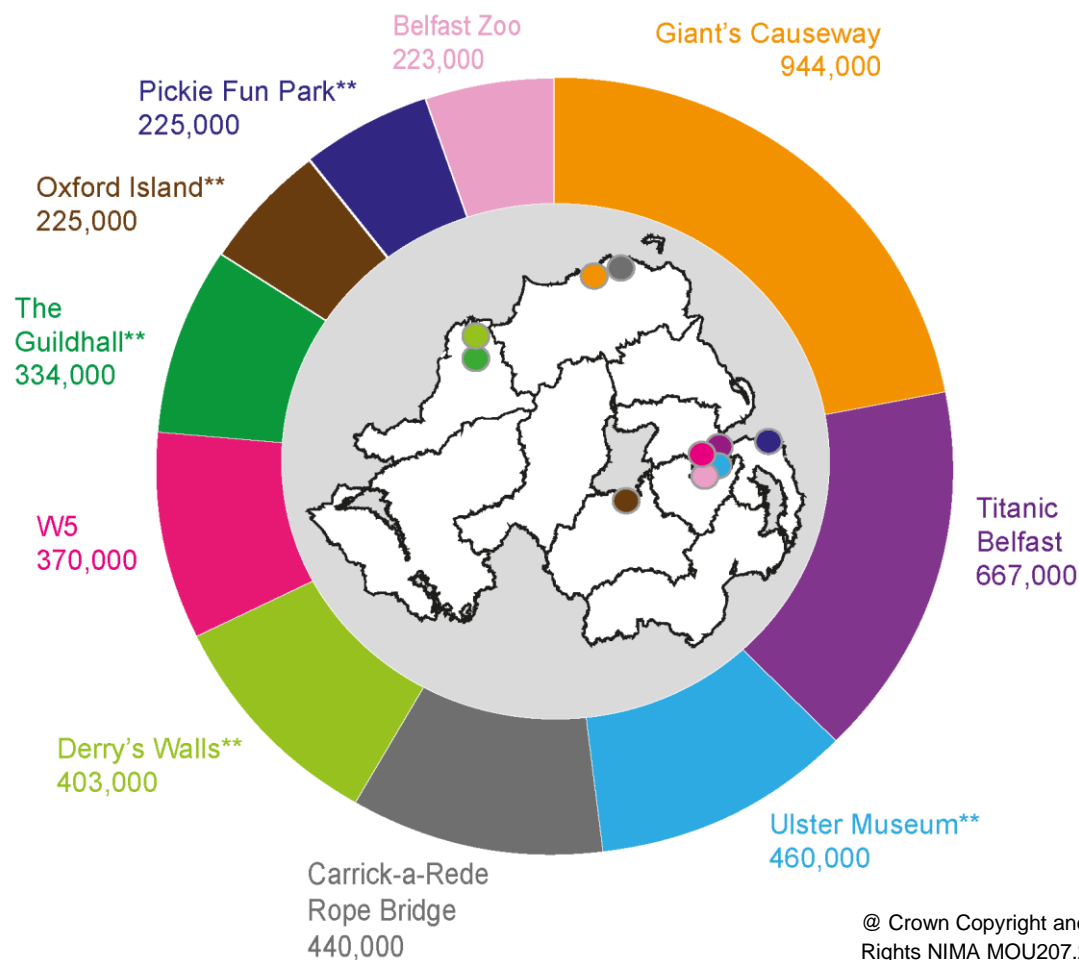
See [link](#) for data

- During 2016, it is estimated that Guest House, Bed & Breakfast and Guest Accommodation had average room occupancy of 34% in NI; and that Self Catering Accommodation had average unit occupancy of 36%.
- These occupancy rates will vary in each LGD, but estimates from these surveys are based on low and varied response rates and should be treated with caution. Local Government Districts can also be subject to fluctuations due to local one off events, weather and other factors such as exchange rates, for example, a weak euro may attract fewer RoI residents to come to NI whilst simultaneously encouraging more NI residents to go to RoI. Indeed, a weak pound may have the opposite impact, including on the wider Euro-zone.

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.
- During 2016, the top visitor attractions were the **Giant's Causeway** (0.94 million visits), **Titanic Belfast** (0.67 million), the **Ulster Museum Belfast** (0.46 million) and **Carrick-a-Rede Rope Bridge** (0.44 million). This is shown in graphical form in Figure 6.
- Users should note that the lists of visitor attractions included in the report only include those that choose to participate and make their results public.

Figure 6: Top 10 Visitor Attractions*, 2016



*excludes country parks/parks/forests/gardens

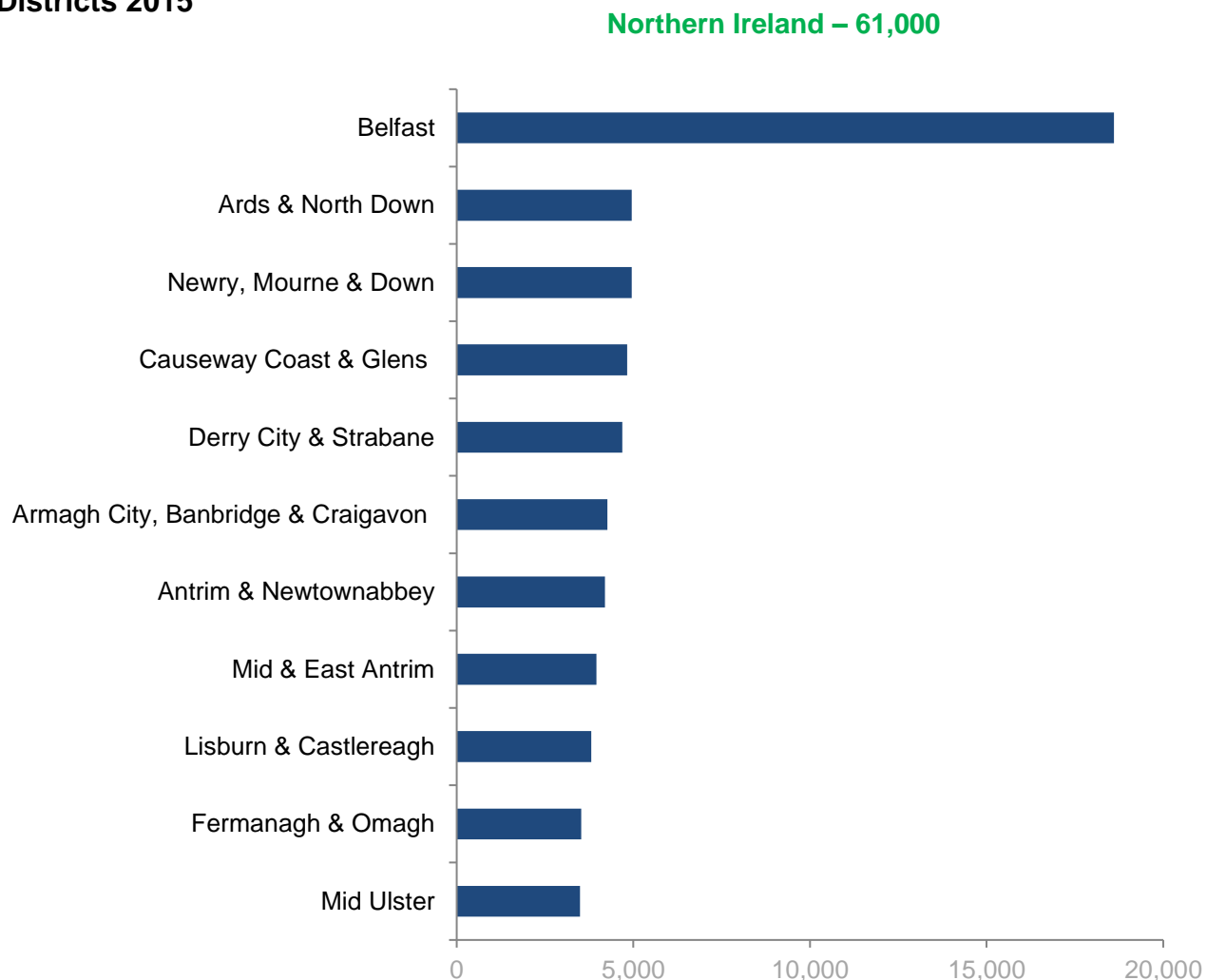
**figures based on estimates

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 7 gives an indication on the number of employee jobs in tourism characteristic industries in each local area. In total, in 2015 there were just an estimated 717,000 employee jobs in Northern Ireland, of which 61,000 or 9% 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, local employment in the tourism industry is higher in Ards & North Down (13%) and Causeway Coast & Glens (12%) LGDs.

Figure 7: Employee Jobs in Tourism Characteristic Industries in Local Government Districts 2015

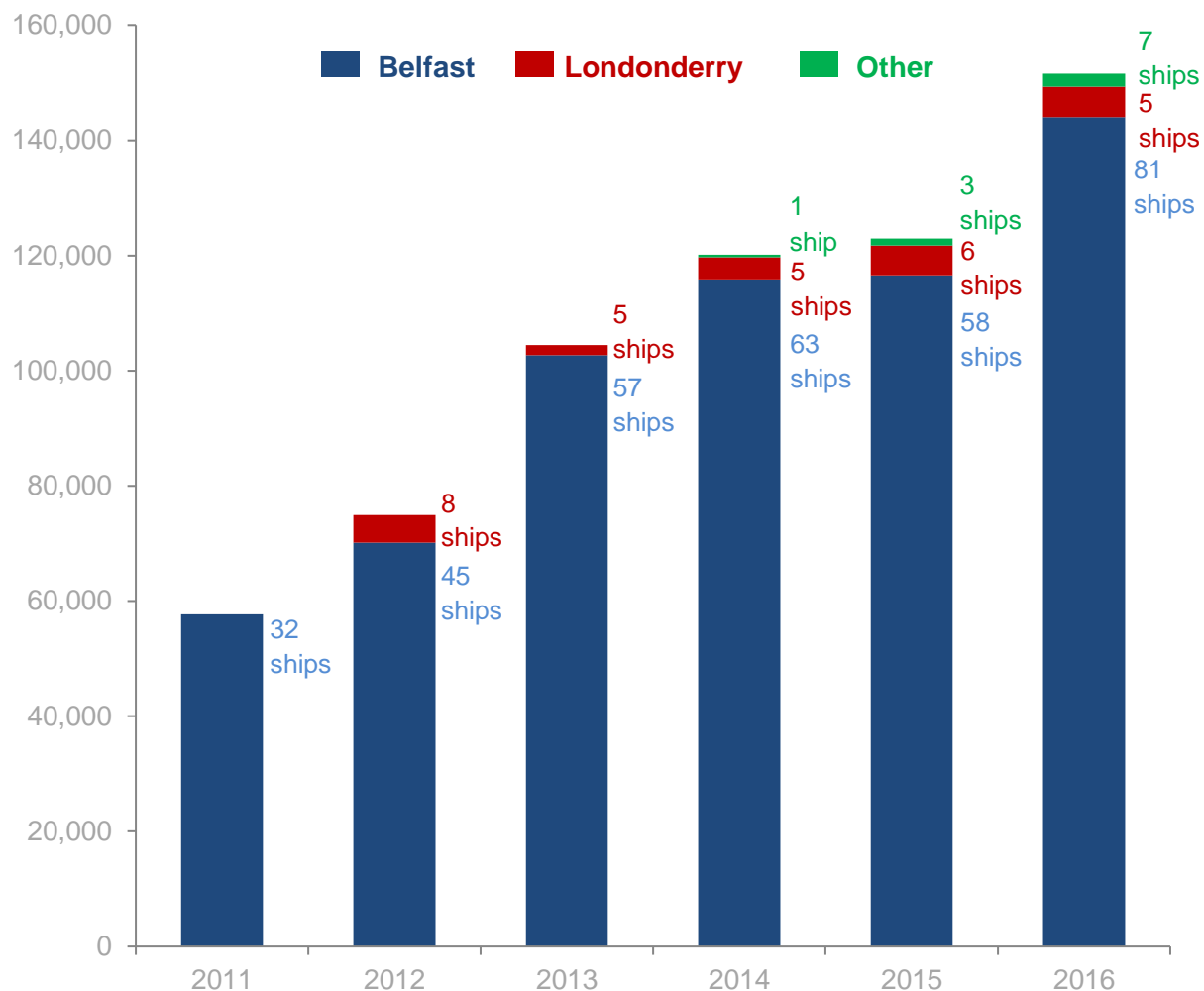


See [link](#) for data

Cruise Ships

- Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 8 shows the trend in the number of cruise ships docking at local ports – see background note 11.
- In 2016, 81 cruise ships docked in Belfast port, 5 in Londonderry port and 7 in other NI ports. The figures point to an increase in numbers of people visiting Northern Ireland from cruise ships, up from a potential 58,000 passengers in 2011 to 152,000 passengers in 2016. 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 8: Total cruise ship numbers and passengers onboard docking at NI ports (2011-2016)



See [link](#) for data

Background Notes

1. This report presents a summary of 2016 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 2016 Northern Ireland tourism statistics showed there were 4.6 million overnight trips, this figure is lower than the 'all LGD' total (4.7 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 has also increased the sample size of the underlying survey used to measure domestic tourism from April 2017. Over the next year (2017/18), NISRA will assess the impact of both changes with a view to improving the overall estimates of domestic tourism and will update users on progress. 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 2016 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 +/-4%. 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. Estimates for the number of overnight trips, associated number of nights and expenditure for each Local Government District were revised on 6th July 2017 due to a revised weighting mechanism for the Household Travel Survey, conducted by Central Statistics Office regarding overnight visitors to Northern Ireland from the Republic of Ireland. More information can be found at this [link](#).

The impact of this revision on the estimates for overnight trips, nights and expenditure to NI was less than 1%, with less of an impact on Local Government District estimates. As per the [Tourism Statistics Branch Revisions Policy](#), TSB have published more information on the minor impact to tourism statistics at this link ([impact of HTS methodological change August 2016](#)). The change in methodology has been discussed at all-island Tourism Statistics groups and NISRA have followed up with key users following this to discuss implications, however the impact is small.

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

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