

This report provides provisional Northern Ireland tourism statistics for the 12 months to June 2014. A variety of measures, estimates of the number of people staying overnight in Northern Ireland, rooms sold in local accommodation, passenger levels at local ports and cruise ship visits are included. A stronger pound has made tourism in Northern Ireland more expensive than before but the report points towards recent growth in local tourism.

Key Findings

- In total £755 million was spent on overnight trips (domestic and external) in Northern Ireland in the 12 month period (July 2013 to June 2014). Spend has increased by 6% from £710 million in the year to June 2013.
- There were 4.17 million overnight trips (domestic and external) in the 12 months to June 2014. This showed no change compared to the 12 months to June 2013.
- In total 2.22 million rooms were sold in hotels and other commercial accommodation in the 12 months to June 2014. This is a 3% increase from the 2.16 million rooms sold in the year to June 2013.
- In the 12 months to June 2014, there were 4.35 million passengers leaving Northern Ireland from local air and sea ports. This is a 1% increase on the year to June 2013 (4.31 million departures).
- In total 62 cruise ships docked in Northern Ireland in the 12 months to June 2014 with up to 108,000 passengers and crew onboard. This sector has doubled in size in the last few years. In comparison in 2011, 32 cruise ships docked here with up to 58,000 passengers and crew onboard.

Introduction

This report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in Northern Ireland.

Measuring tourism is challenging with no single measure providing a definitive statistic. This report includes a variety of measures to paint a more complete picture. A primary aim of the report is to provide information on progress towards the Programme for Government target aimed directly at tourism. The target is to have Northern Ireland overnight visitor numbers of 4.2 million and associated revenue of £676 million in the year to [December 2014](#) (see background note 4).

The report includes four sections:

1. Overnight trips in Northern Ireland (Trips, Spend)
2. Hotel and other commercial accommodation rooms sold
3. Passenger activity at Northern Ireland air and sea ports
4. Other Sources (Tourism jobs, Cruise Ships at NI ports)

The report also includes background notes to provide information on the methodology and background to these statistics. A key methodological issue is noted in the box below.

Overnight: Headline tourism statistics are measured using standard 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 including overnighting of visitors to Northern Ireland it also includes overnights of local residents within Northern Ireland. Note overnighting excludes day trips, which will be a significant part of the local tourism market.

These points are important to remember when assessing the trip statistics in section 1.

Section 1: Overnight trips in Northern Ireland

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.

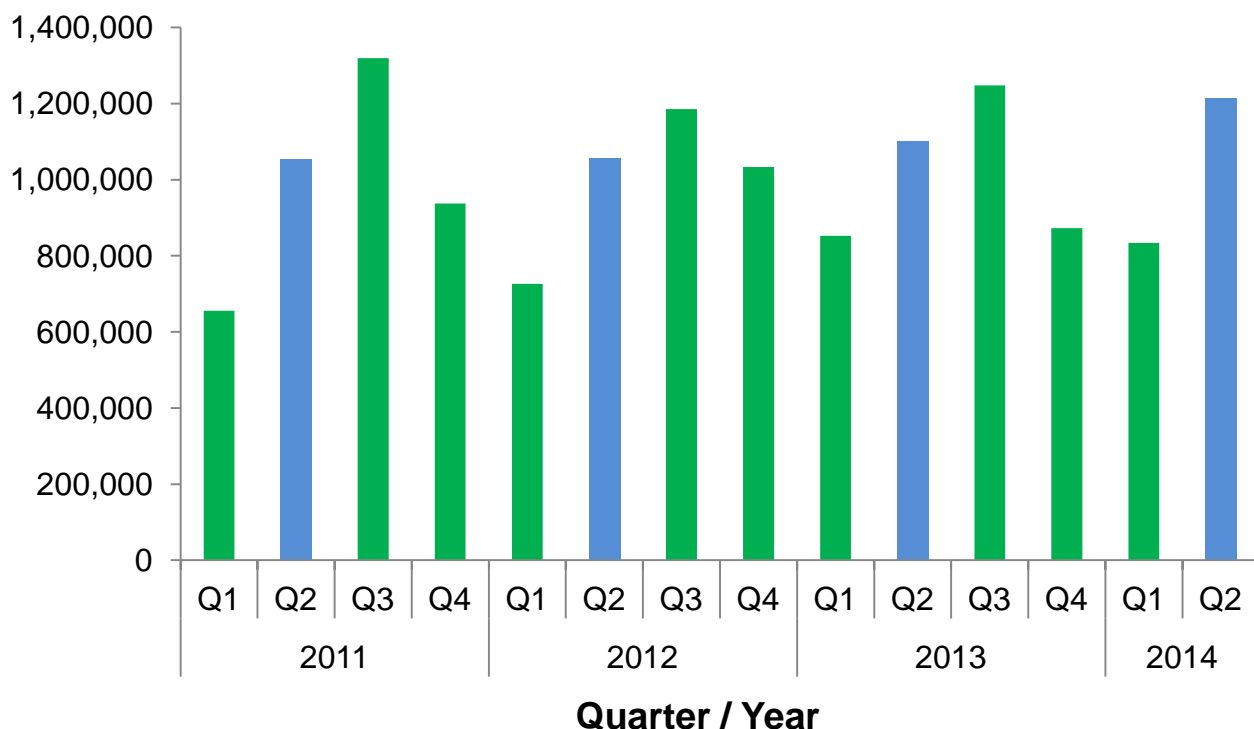
- (i) Firstly, **surveys of passengers** at air and sea ports in Northern Ireland and the Republic of Ireland are undertaken to identify overnight trips to Northern Ireland by people living outside the island of Ireland.
- (ii) Secondly **household surveys** in Northern Ireland and the Republic of Ireland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

The overnight trip statistics presented relate to the combined overall picture.

Overall volume / latest trend

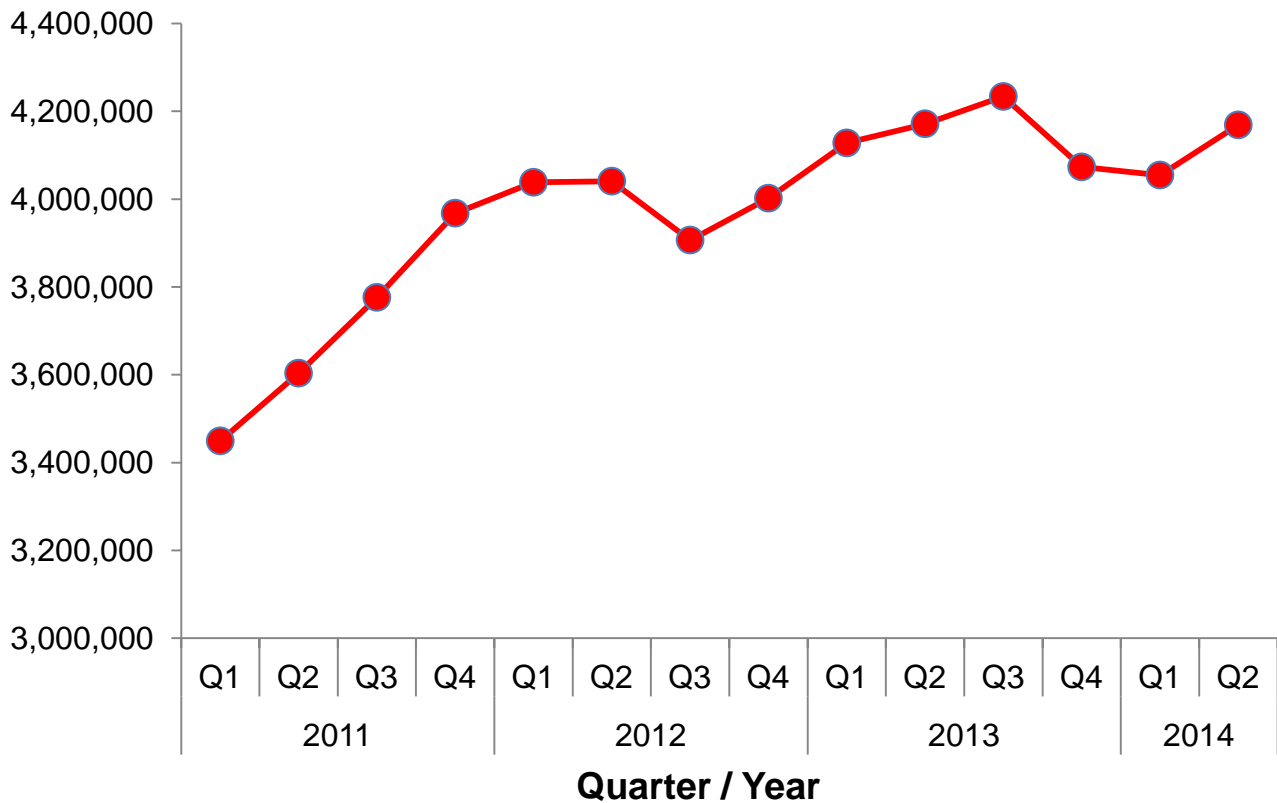
- Figure 1a shows the cyclical trend in quarterly overnight trips (blue bars relate to quarter 2). There were 1.21 million overnight trips in quarter 2 2014, which is higher than quarter 2 in the three previous years. Indeed, the first half of 2014 (January to June 2014) shows an increase on the previous year.

Figure 1a: Estimated quarterly number of overnight trips, Q1 2011 – Q2 2014



- In assessing the scale of any increase it is advisable to compare volumes over a rolling twelve month period. Figure 1b shows the trend in the number of overnight trips over a rolling twelve month period. The estimated number of overnight trips (domestic and external) in the 12 months to June 2014 was 4.17 million. This represents no change from the 4.17 million overnight trips recorded in the same period the previous year (July 2012-June 2013). However, figure 1b shows the general upward trend.

Figure 1b: Rolling year number of overnight trips, Q1 2011 – Q2 2014 (non-zero axis)

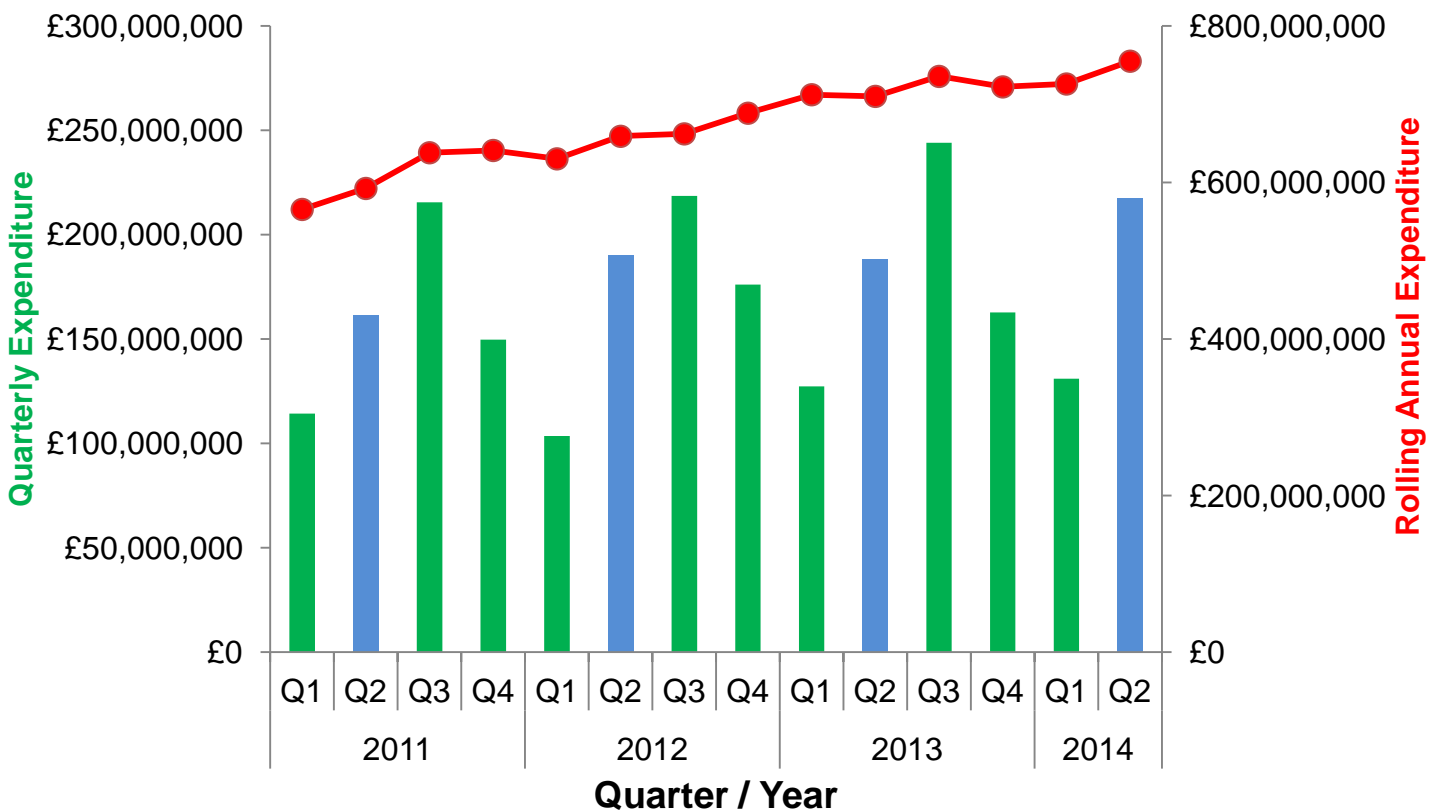


See [link](#) for data

Expenditure associated with Overnight Trips

- Figure 2 (bar chart and left axis) shows the cyclical trend in quarterly expenditure associated with overnight trips (again the blue bars relate to quarter 2). In 2014 quarter 2 expenditure associated with overnight trips is estimated to be £217 million – higher than quarter 2 in each of the three previous years. Year to date figures show an increase (up 10%) in spend when compared to the previous year. Again, in assessing the scale of any increase it is advisable to compare expenditure over a rolling twelve month period.
- Expenditure over a rolling 12 month period is also shown in figure 2 (line chart and right axis). This shows the clear upward trend. Expenditure associated with overnight trips in the 12 months to June 2014 was £755 million. This represents a 6% increase from the £710 million recorded in the 12 months to June 2013. However inflation of prices in goods and services will account for some of this increase.

Figure 2: Estimated quarterly expenditure on overnight trips, Q1 2011 – Q2 2014



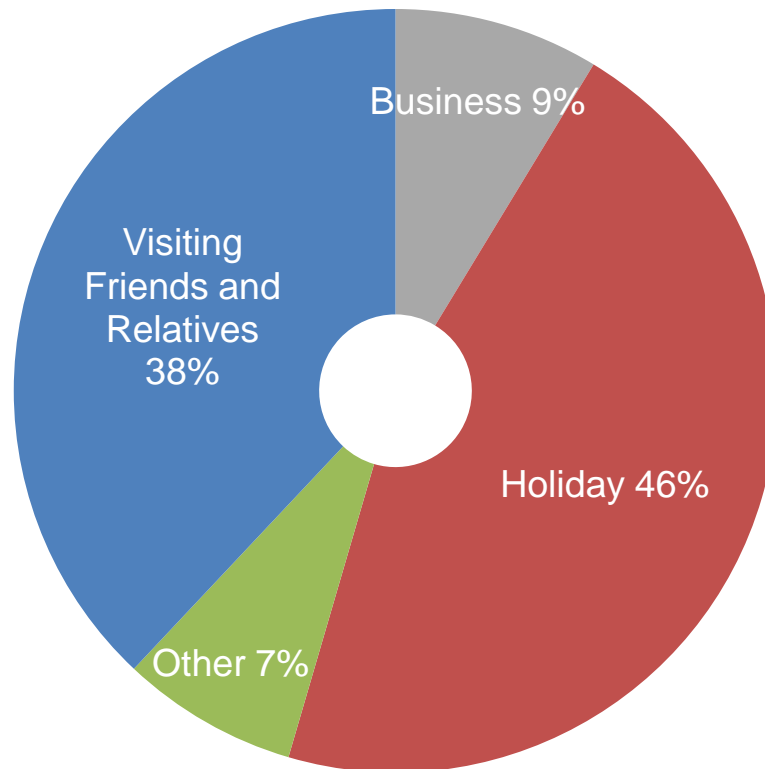
See [link](#) for data

- To put this annual expenditure (£755 million) in context – the 2012 estimate for NI Gross Value Added stands at just under £30 billion. Indicating that in monetary terms spending on overnight trips broadly equates to around 2.5% of the local economy.

Reason for Overnight Trip

- Survey respondents are also asked the reason they stayed overnight here. The result for all overnight trips regardless of place of origin¹ is shown in Figure 3.

Figure 3: Reason for Overnight Trip in Northern Ireland (July 2013 – June 2014) – Overnight Trips



See [link](#) for data

- A significant element of the local overnight market is people holidaying here. This made up nearly 46% of overnight volume. A further 38% of overnight trips were due to people visiting friends and relatives in Northern Ireland.

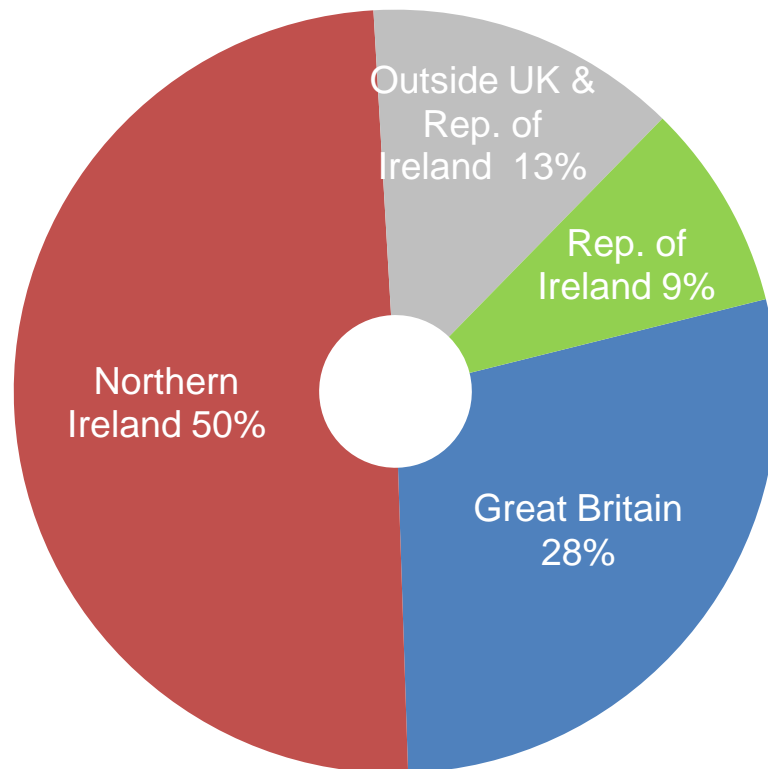
Place of origin

- We can also determine the place of origin of people who overnight in Northern Ireland. In total half (50%) of all overnight trips (2.1 million) are by local residents (domestic trips). For example someone from Belfast going to Fermanagh for the weekend either on holiday or to visit friends/relatives.

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

- A further 28% of overnight trips (1.2 million) were from people living in Great Britain, 9% (0.4 million) were people from the Republic of Ireland and the remaining 13% (0.6 million) were people from outside the UK and Republic of Ireland. The figures point to the importance of the domestic and Great Britain markets. See Figure 4.

Figure 4: Place of origin overnight visitors (July 2013 – June 2014) – Overnight trips



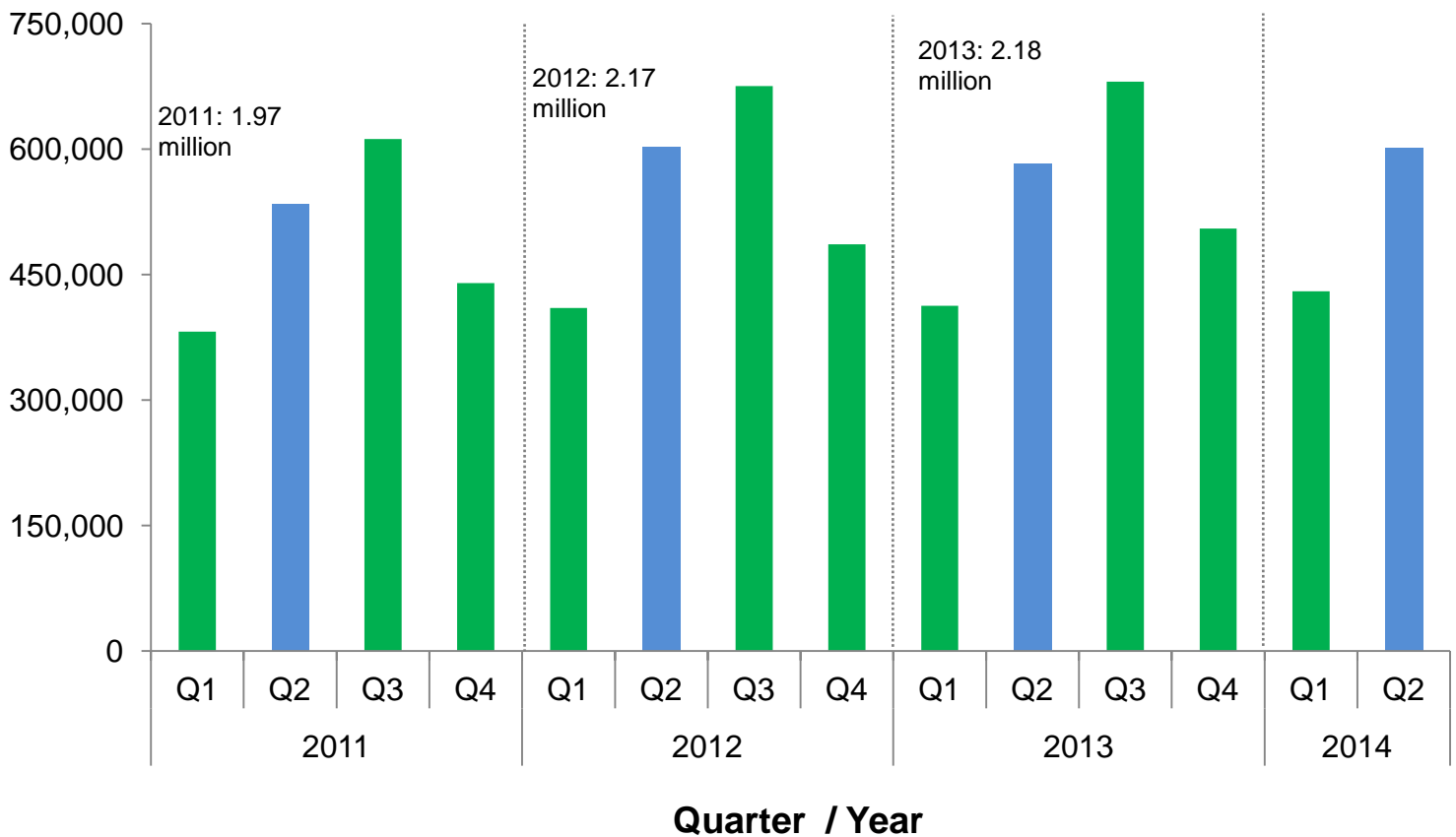
See [link](#) for data

- In total 42% or 1.7 million overnight trips to Northern Ireland are by people who live outside the island of Ireland (Great Britain and Outside UK & Republic of Ireland).
- The vast majority (over 90%) of Great Britain visitors arrive through Northern Ireland ports. Looking in more detail– Great Britain visitors include a significant volume of people visiting friend and relatives in Northern Ireland (0.7 million overnight trips).
- In contrast the majority of visitors from outside UK & Republic of Ireland come through Republic of Ireland ports (61% Republic of Ireland ports and 39% Northern Ireland ports). Full detailed statistics are available on our [website](#).

Section 2: Hotel and other commercial accommodation rooms sold

- Alongside passenger and household surveys, NISRA conduct a monthly occupancy survey of local hotels and commercial accommodation (e.g. bed & breakfasts, guest houses and guest accommodation). Quarterly statistics on the number of rooms sold are shown in Figure 5 (with again the blue bars relating to quarter 2).
- The detailed figures show that over the latest 12 month period (July 2013 – June 2014) the number of rooms sold was 2.22 million, a 3% increase from the 2.16 million rooms sold in the rooms sold in the 12 months to June 2013.

Figure 5: Hotel & other commercial accommodation rooms sold (Q1 2011- Q2 2014)



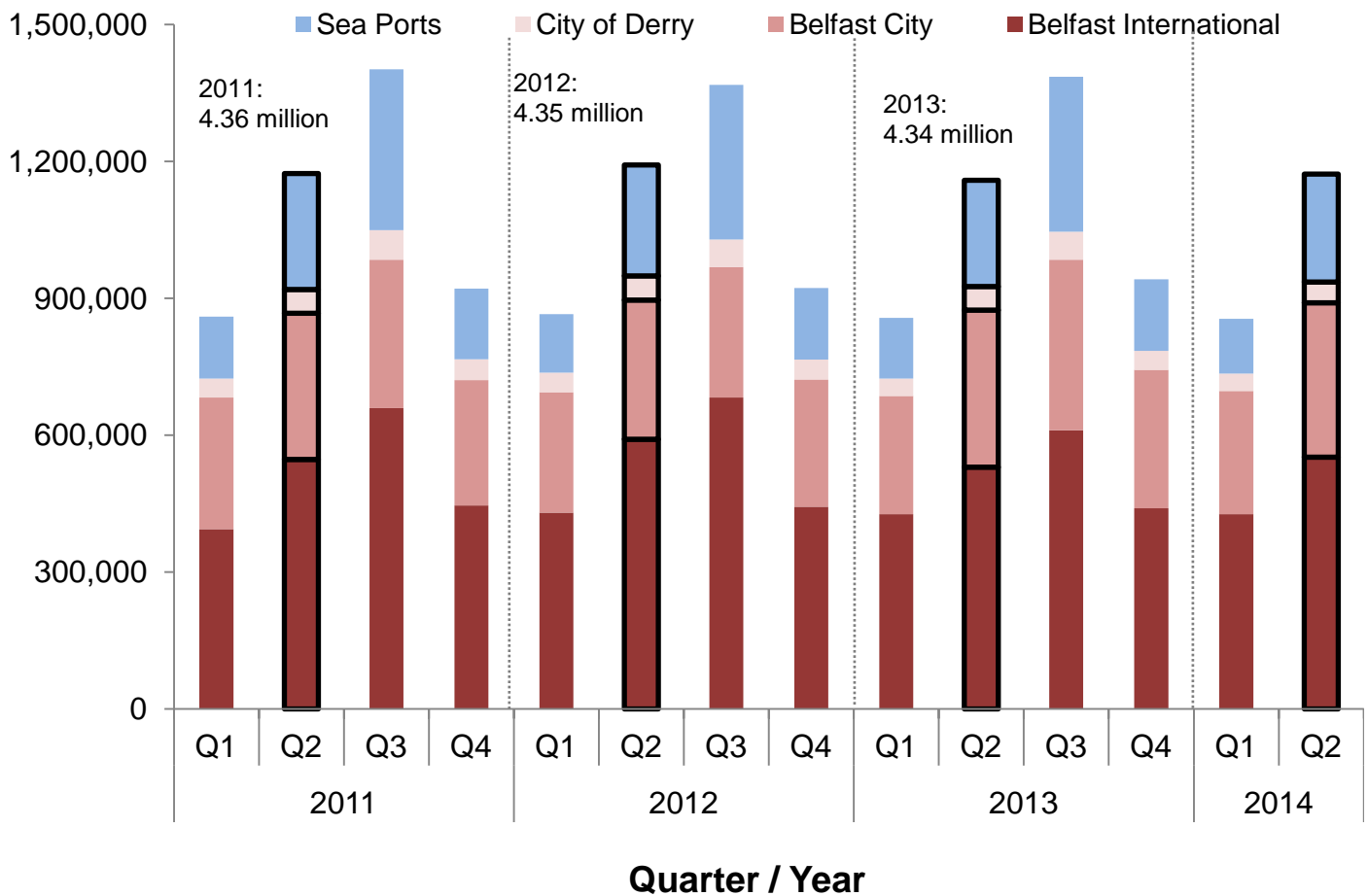
See [link](#) for data

- Over the latest 12 month period, 85% of rooms sold were in hotels and the average daily number of rooms available is under 11,000. More detailed occupancy survey statistics are available on our [website](#).

Section 3: Passenger activity at Northern Ireland air and sea ports

- The Civil Aviation Authority collects passenger information from NI airports (Belfast International, Belfast City and City of Derry). Port authorities in Belfast and Larne collect data on sea passengers. The latest combined quarterly data on outgoing passengers are shown in Figure 6.

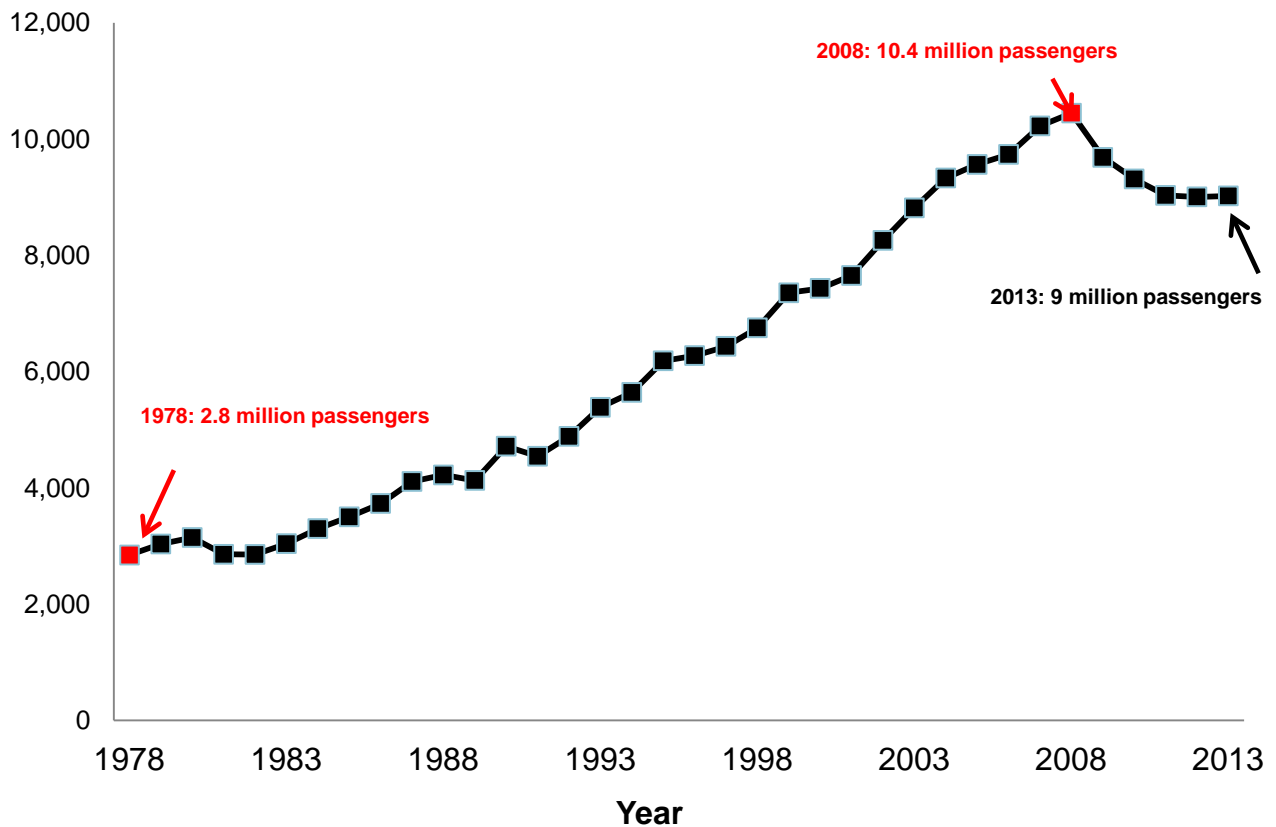
Figure 6: Quarterly outgoing passengers Northern Ireland ports (Q1 2011– Q2 2014)



See [link](#) for data

- Latest quarterly statistics show an increase of 1% in outgoing passengers in the second quarter of 2014 (1.172 million) compared to the second quarter of 2013 (1.158 million). The 4.353 million outgoing passengers in the 12 months to June 2014 also showed an increase of 1% compared to the same period the previous year. The long-term annual trend is informative and is shown in Figure 7.

Figure 7: Total passenger throughput (000s) (in and out) NI ports (1978-2013)



See [link](#) for data

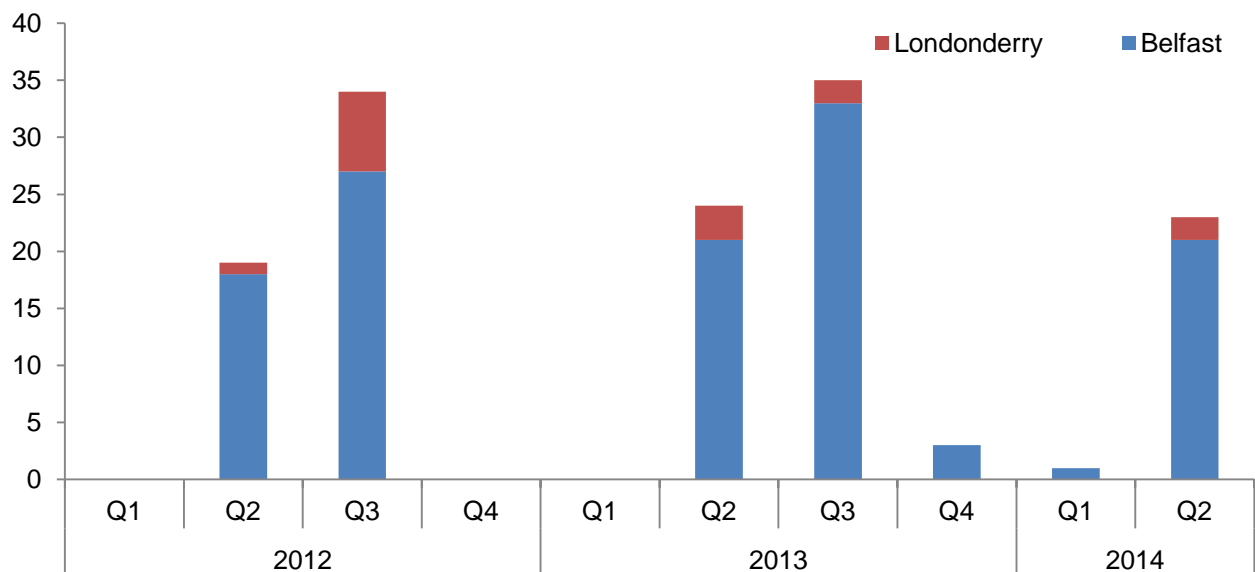
- Over the longer term total passenger throughput (in and out) at local air and sea ports has risen from 2.8 million passengers in 1978 to 9 million passengers in 2013 - a three-fold increase.
- However, passenger throughput (in and out) has fallen from 10.4 million passengers in 2008 to 9 million in 2013 – a fall of 15%. Looking more closely throughput has been broadly static from 2011 onwards (this is reflected in figure 6). Clearly, a significant impact has been the worldwide recessionary period starting in 2008. This pattern is not unique to Northern Ireland with falls from 2007 onwards also being observed in Republic of Ireland and Great Britain data. Indeed figures for the Republic of Ireland are relevant to the Northern Ireland tourism market. The total throughput of Republic of Ireland air and sea ports has fallen from 32 million passengers in 2008 to 25 million passengers in 2012 a fall of 22%.

Section 4: Other Sources (Tourism jobs, Cruise Ships)**Tourism and Leisure jobs**

- At June 2014, the Quarterly Employment Survey estimated that tourism and leisure industries accounted for 55,000 employee jobs in Northern Ireland. This is around 8% of all employee jobs in Northern Ireland. The volume of jobs has increased by 3% since quarter 2 2011 (53,500) – see background note 10.

Cruise Ships

- Section 1 relates to overnight trips only, with day trips excluded. Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 8 shows the quarterly trend in the number of cruise ships docking at local ports – see background note 13.

Figure 8: Total cruise ship numbers docking at NI ports (Q1 2012 – Q2 2014)

See [link](#) for data

- Although not shown in figure 8, the number of cruise ships docking here has increased markedly over time. In the full 2011 year, 32 cruise ships docked in local ports with up to 58,000 passengers and crew onboard. In the 12 months to June 2014, there were up to 108,000 passengers and crew onboard the 62 cruise ships that docked in local ports.

NISRA

October 2014

Background Notes

1. This report presents a summary of tourism information in the year ending June 2014. More detailed quarterly data is available on our website at this [link](#). It should be noted that 2014 data are provisional and will not be finalised until publication of the 2014 annual tourism statistics report in Spring 2015.
2. Tourism data is derived from a variety of sources, more information on these sources can also be found at this [link](#). Information on the data quality, revisions 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
4. The measures reported in this report are the primary means of monitoring progress towards Programme for Government (PfG) targets related to tourism. These aim to increase visitor numbers to 4.2 million and tourist revenue to £676 million by December 2014. (<http://www.northernireland.gov.uk/pfg-2011-2015-final-report.pdf>). PfG targets relate to all overnight trips in Northern Ireland including people from (i) Great Britain (ii) the Republic of Ireland (iii) outside the UK and Republic of Ireland and (iv) Northern Ireland taking overnight trips within NI. The originally published target for 2013 included a target of 3.6 million visitors and £625 million expenditure. These were subsequently revised in DETI's Operating Plan for 2013-14 to 4.1 million visitors and £637 million expenditure. Previously published NISRA tourism estimates for 2013 indicated that both sets of targets for 2013 have been met. Assessment of whether the 2014 targets have been achieved will not be available until publication of the 2014 annual tourism statistics report in Spring 2015.
5. NISRA uses the Survey of Overseas Travellers run by Fáilte Ireland to gain information on the overnight trips to Northern Ireland who exit 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 is undertaking research to assess how the two sources could be used together in the future.
6. Due to the nature of household surveys, users should be aware that some information on overnight trips of children who overnight without their parents/guardians will be excluded.

7. Tourism statistics systems are designed to collect information for Northern Ireland as a whole. However, respondents do indicate where they stay during these overnight trips allowing for some analysis at Local Area level. NISRA plans to publish 2013 overnight trips by Local Government District level in Autumn 2014.
8. 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. An overview and explanation of any resultant breaks and the benefits of such breaks can be found at http://www.detini.gov.uk/developing_northern_ireland_tourism_statistics.pdf
9. The estimates 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 stands at +/- 6% for the year. Estimates around the associated expenditure stands at +/- 11%. Information on confidence intervals in Northern Ireland tourism statistics can be accessed at http://www.detini.gov.uk/confidence_intervals_in_tourism_statistics_example_local_government_district_2011-2012_.pdf
10. This report includes estimates from the Quarterly Employment Survey (QES) on the number of jobs in 'tourism and leisure' industries. In other publications, NISRA report on 'tourism characteristic industries'. The tourism characteristic industries breakdown is unavailable on a quarterly basis. More information on the Quarterly Employment Survey and its methodology can be accessed at http://www.detini.gov.uk/index/what-we-do/deti-stats-index/labour_market_statistics/stats-qes.htm
11. The number of overnight trips in Northern Ireland for the last 12 months (to June 2014) will have been influenced by large events that have taken place here such as the UK City of Culture year in Derry~Londonderry, the World Police and Fire Games, the all-Ireland Fleadh and the Giro D'Italia. However, the macro statistics presented cannot be used to evaluate the success of these events – evaluation of these events is being undertaken separately by the organisations responsible.

12. This report does not include detailed information on day trips taken within Northern Ireland, however it is recognised that these would be important in providing a complete story of tourism here. NISRA collects information on day trips taken within Northern Ireland by local residents. It is planned to provide information on this issue in the 2014 annual tourism statistics report in Spring 2015.

13. 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 section 4 includes statistics from [Visit Belfast](#), [Cruise North West](#) and Newry & Mourne Council relating to Warrenpoint port. Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (Bangor & Portrush) – statistics from these visits are not included in this report due to data availability issues.

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

We welcome feedback from users on the content, format and relevance of this release. Please send feedback to the email address below.

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