

Northern Ireland Tourism Statistics July 2014 – June 2015

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**4.5m
trips**



**14.9m
nights**



**£725m
spent**

The key points are:

- There were **4.5 million overnight trips** (domestic & external) in the year to June 2015. This is a **9% increase** over the year to June 2014.
- **Expenditure** associated with these trips was **£725 million**, **4% lower** than the year to June 2014. The fall in the value of the euro relative to the pound (down 19% from July 2013 to June 2015) will have had an impact on tourism expenditure.
- There were **14.9 million nights** spent on these trips. This is **2% lower** than the year to June 2014. **However**, over the same period the number of **nights spent in hotels has increased**. In total **2.22 million rooms** were sold in hotels & other commercial accommodation in the year to June 2015. This is a **2% increase** on the 2.17 million rooms sold in the year to June 2014.
- There were **local differences** in hotel demand. In the first half of 2015 hotels in **Belfast** reported room occupancy of **80%**, well in **excess** of the rest of NI.
- In the year to June 2015, there were up to 110,000 passengers & crew onboard the **67 cruise ships** visiting local ports. The cruise ship market has **increased since 2011**.

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Introduction

This report provides a picture of Northern Ireland Tourism. The report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in Northern Ireland.

Measuring tourism locally is challenging with no single statistic providing a definitive measure. Therefore this report includes a variety of data to paint a more complete picture. A primary aim is to measure progress towards the 2011-5 Programme for Government tourism target, to increase visitor numbers to 4.2 million and associated revenue to £676 million in 2014. The report includes 4 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 which 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 United Nations 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 a holiday, it can also relate to visiting relatives, business etc. As well as including overnighing visitors to Northern Ireland, it also includes overnights of local residents within Northern Ireland. Note overnighing excludes day trips, which will be a significant part of the local tourism market.

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

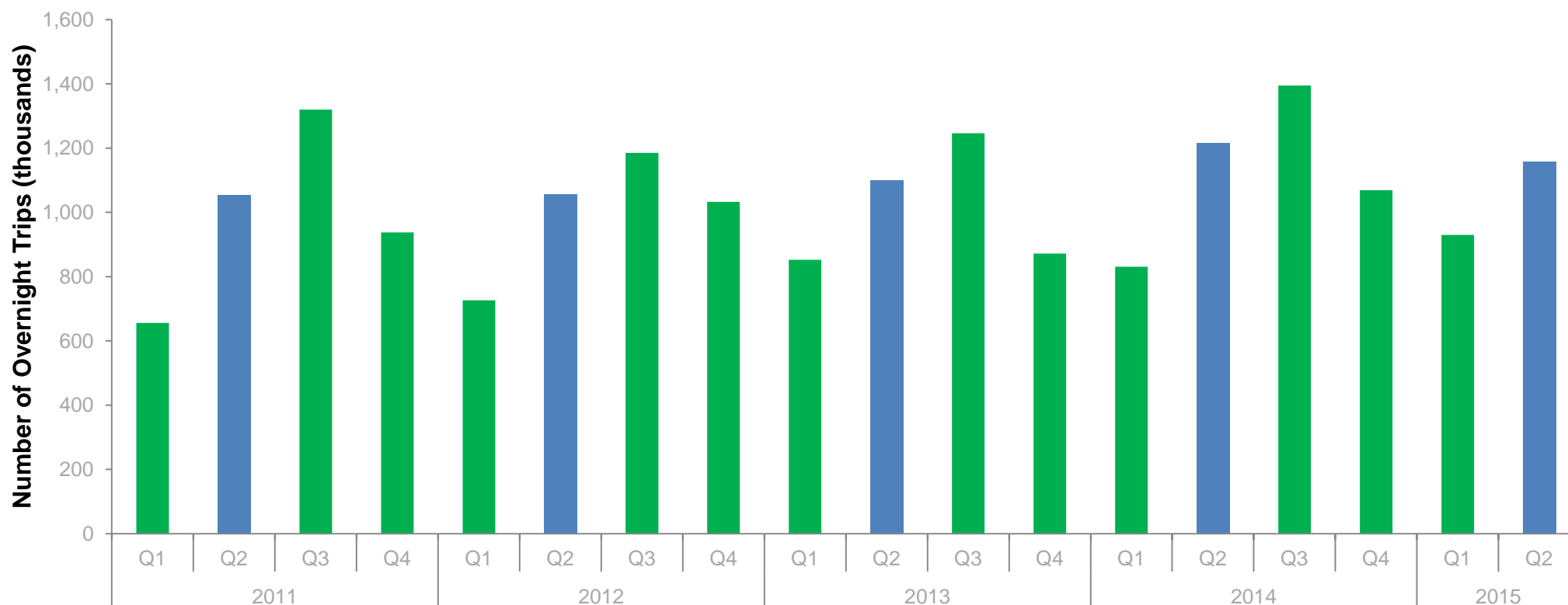
Section 1: Overnight Trips in Northern Ireland (Trips, Spend)

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.

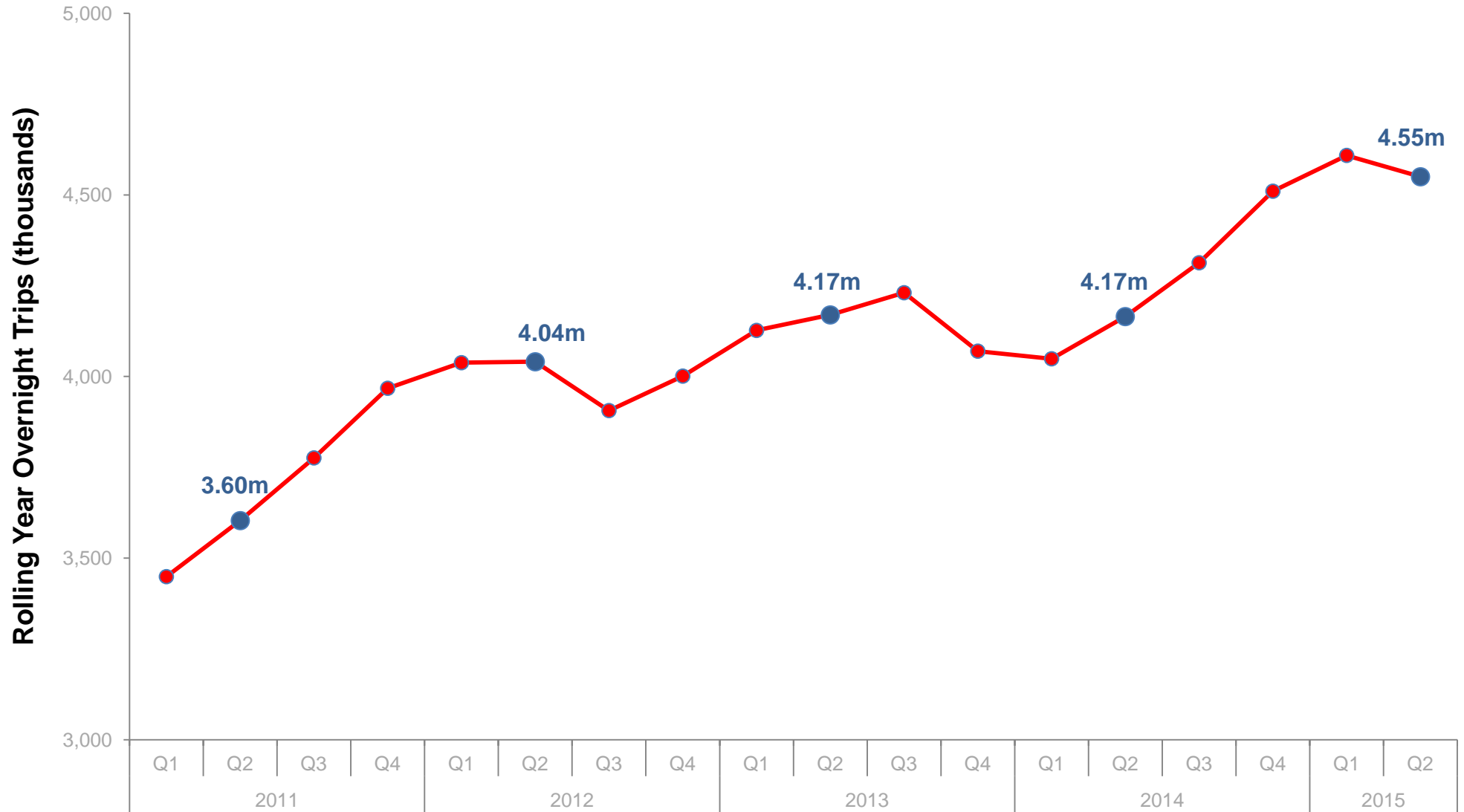
The overnight trip statistics presented relate to the combined overall picture. Figure 1a shows the trend in quarterly overnight trips (blue bars relate to quarter 2). There were 1.2 million overnight trips in quarter 2 2015.

Figure 1a: Estimated number of overnight trips, Quarter 1 2011 to Quarter 2 2015



In assessing changes 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 year to June 2015 was 4.55 million. This represents a 9% increase from the 4.17 million overnight trips recorded in the year to June 2014. Figure 1b shows the trend.

Figure 1b: Rolling year number of overnight trips, Quarter 1 2011 - Quarter 2 2015 (non-zero y axis)

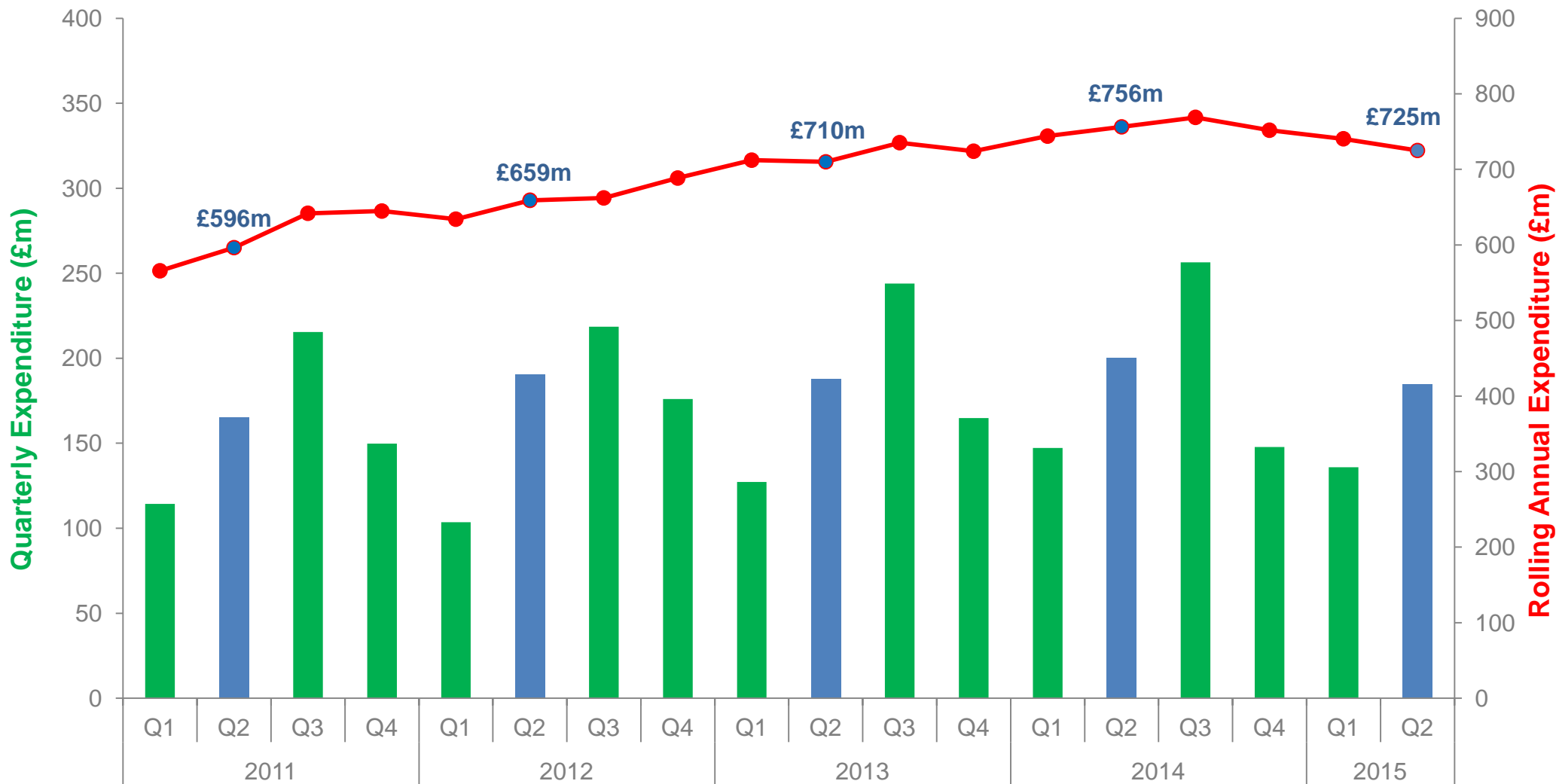


See [link](#) for data

Expenditure Associated with Overnight Trips

Figure 2 shows the cyclical trend in quarterly expenditure (bar chart and left axis) associated with overnight trips (blue bars - quarter 2). A rolling twelve month period is also shown (line chart and right axis). Expenditure associated with overnight trips in the twelve months to June 2015 was £725 million. To put this expenditure in context – the 2013 estimate for NI Gross Value Added stands at just under £33 billion. Indicating that in monetary terms spending on overnight trips broadly equates to 2.2% of the local economy.

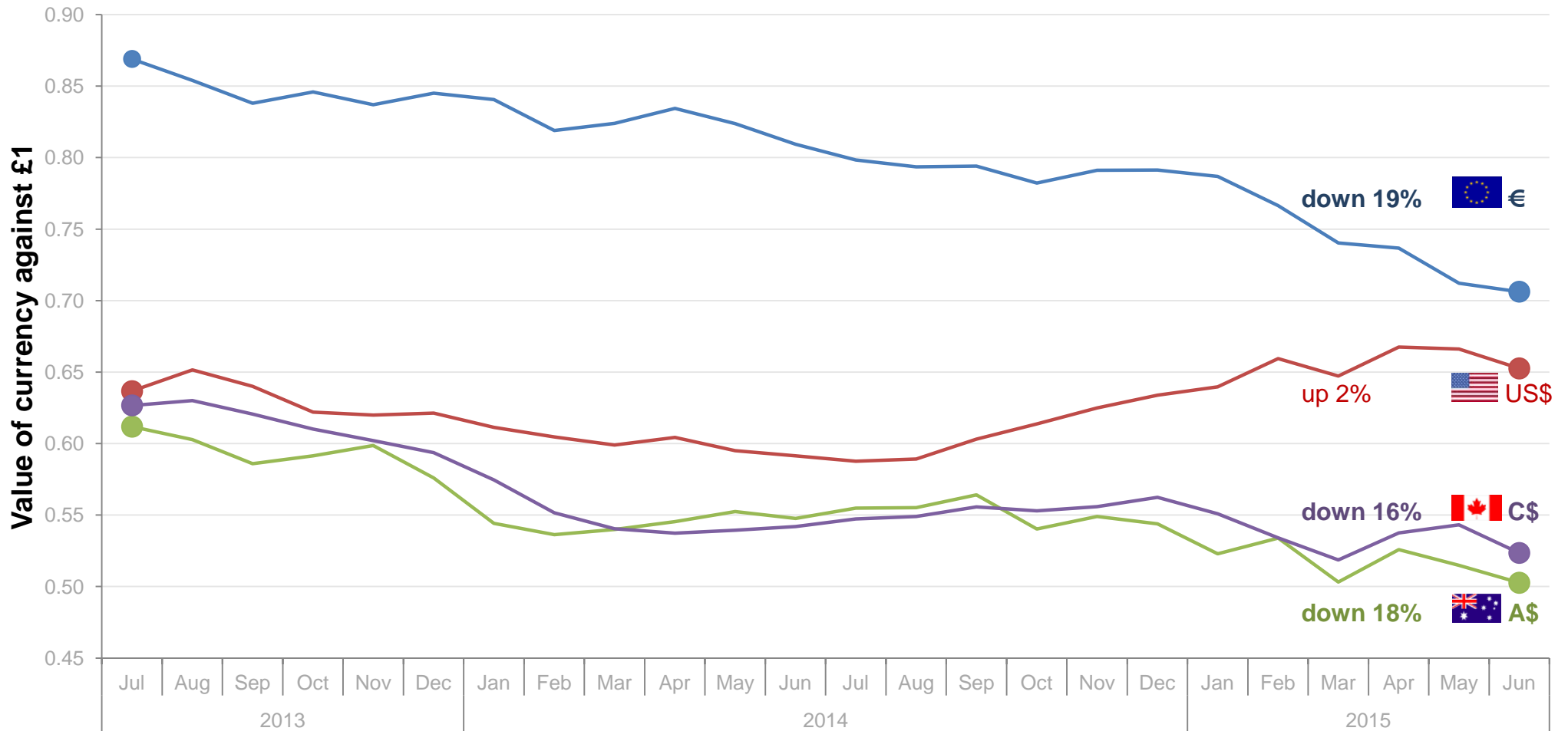
Figure 2: Estimated quarterly (left axis-£m) & rolling annual (right axis-£m) expenditure overnight trips, Quarter 1 2011 - Quarter 2 2015



See [link](#) for data

The £725 million expenditure in the year to June 2015 is a 4% decrease on the £756 million for the year to June 2014. Exchange rate fluctuations may partially explain this. Figure 3 shows monthly exchange rate changes from July 2013 to June 2015. It shows that the euro (€) has experienced a prolonged fall against the pound (£) - down 19% from July 2013 to June 2015. This fall was also more pronounced in the six months to June 2015. Similar falls are seen in the Australian (A\$) and Canadian (C\$) dollars. The only currency to remain strong against the pound over this two year period has been the US dollar (US\$). A further issue is that a strong pound (against the euro specifically) makes external tourism trips of Northern Ireland residents more attractive, which in turn can act to depress demand for local domestic tourism.

Figure 3: Monthly exchange rates - currency against £1 July 2013 - June 2015 – (non-zero y axis)

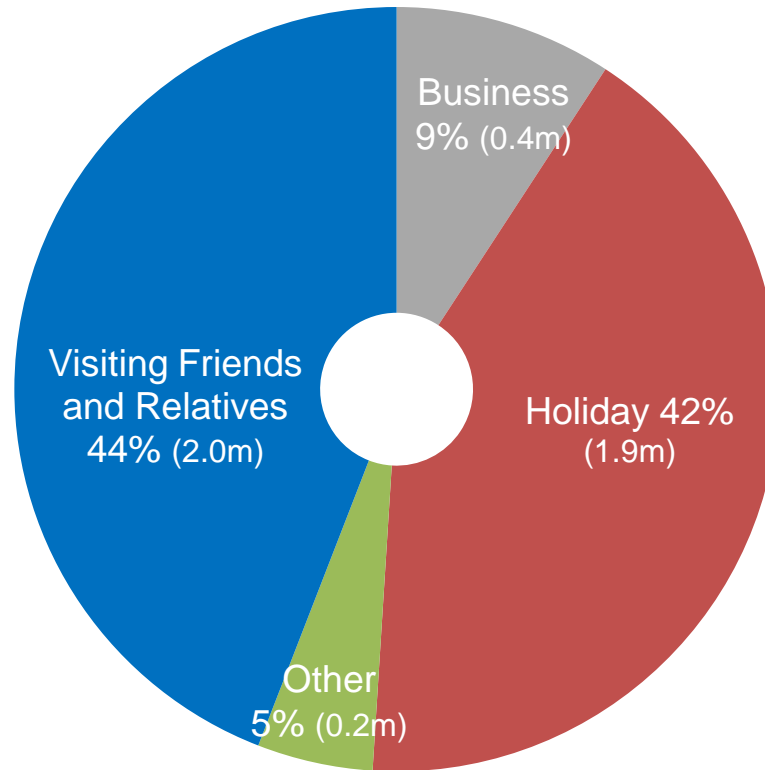


Source: [Financial Times](#).

Reason for Overnight Trip

Survey respondents are also asked the reason for their overnight stay. The result for all overnight trips, regardless of place of origin¹, is shown in Figure 4.

Figure 4: Reason for overnight trip in Northern Ireland (July 2014 – June 2015)



See [link](#) for data

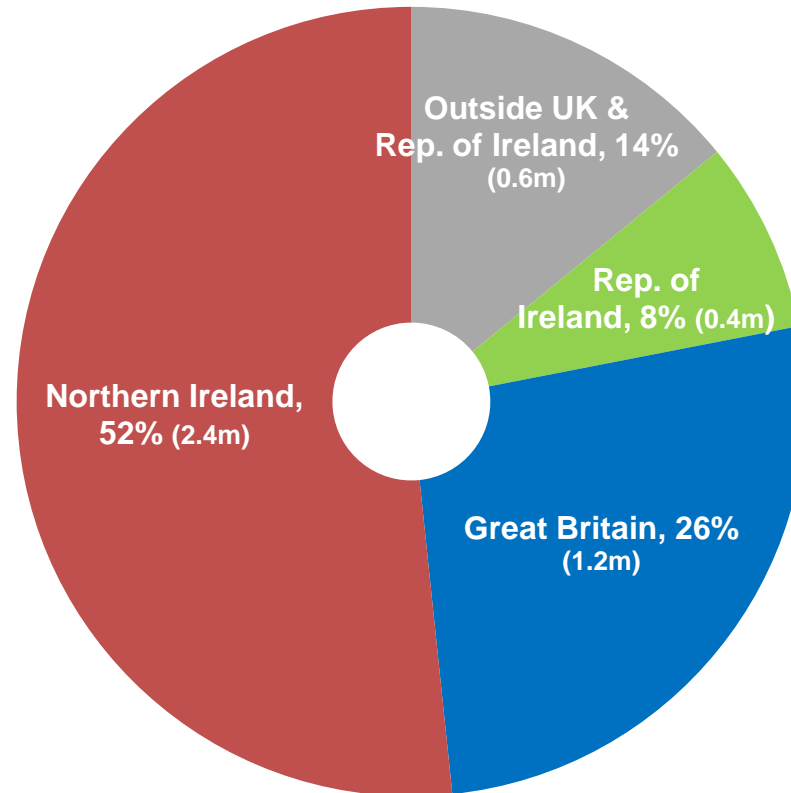
A significant element of the local overnight market is people visiting friends and relatives here. This makes up 44% of all overnight volume. A further 42% of overnight trips were due to people holidaying in Northern Ireland.

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

Place of Origin

We can also determine the place of origin of people who overnight in Northern Ireland. In total half (52%) of all overnight trips (2.4 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. A further 26% of overnight trips (1.2 million) were by people living in Great Britain. The figures point to the continuing importance of the domestic and Great Britain markets. See Figure 5.

Figure 5: Place of origin of overnight visitors (July 2014 – June 2015)



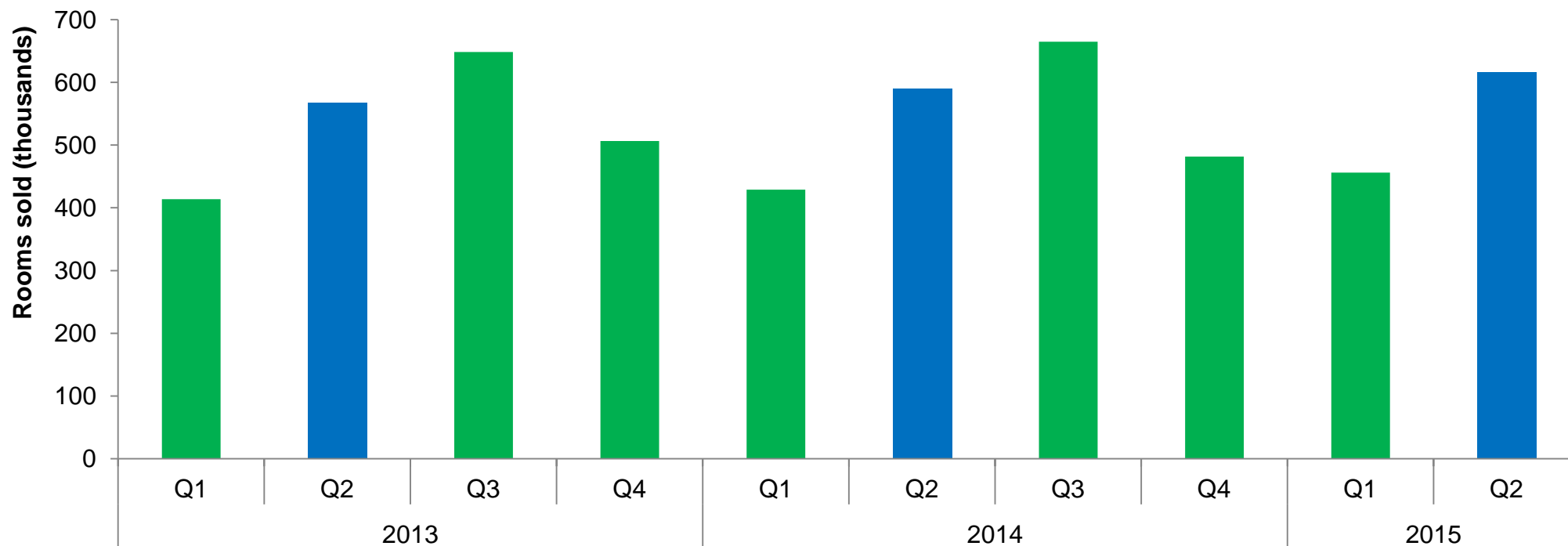
See [link](#) for data

In total 41% or 1.8 million overnight trips to Northern Ireland are by people who live outside the island of Ireland. The 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 friends 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 (66% Republic of Ireland ports and 34% Northern Ireland ports) 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 6 (again the blue bars relate to quarter 2). The detailed figures show that over the latest 12 month period (July 2014 – June 2015) the number of rooms sold was 2.22 million, a 2% increase from the 2.17 million rooms sold in the 12 months to June 2014.

Figure 6: Hotel & other commercial accommodation rooms sold² (thousands) Quarter 1 2013 - Quarter 2 2015



See [link](#) for data

Over the latest 12 month period, 86% of rooms sold were in hotels and the average daily number of rooms available is under 11,000.

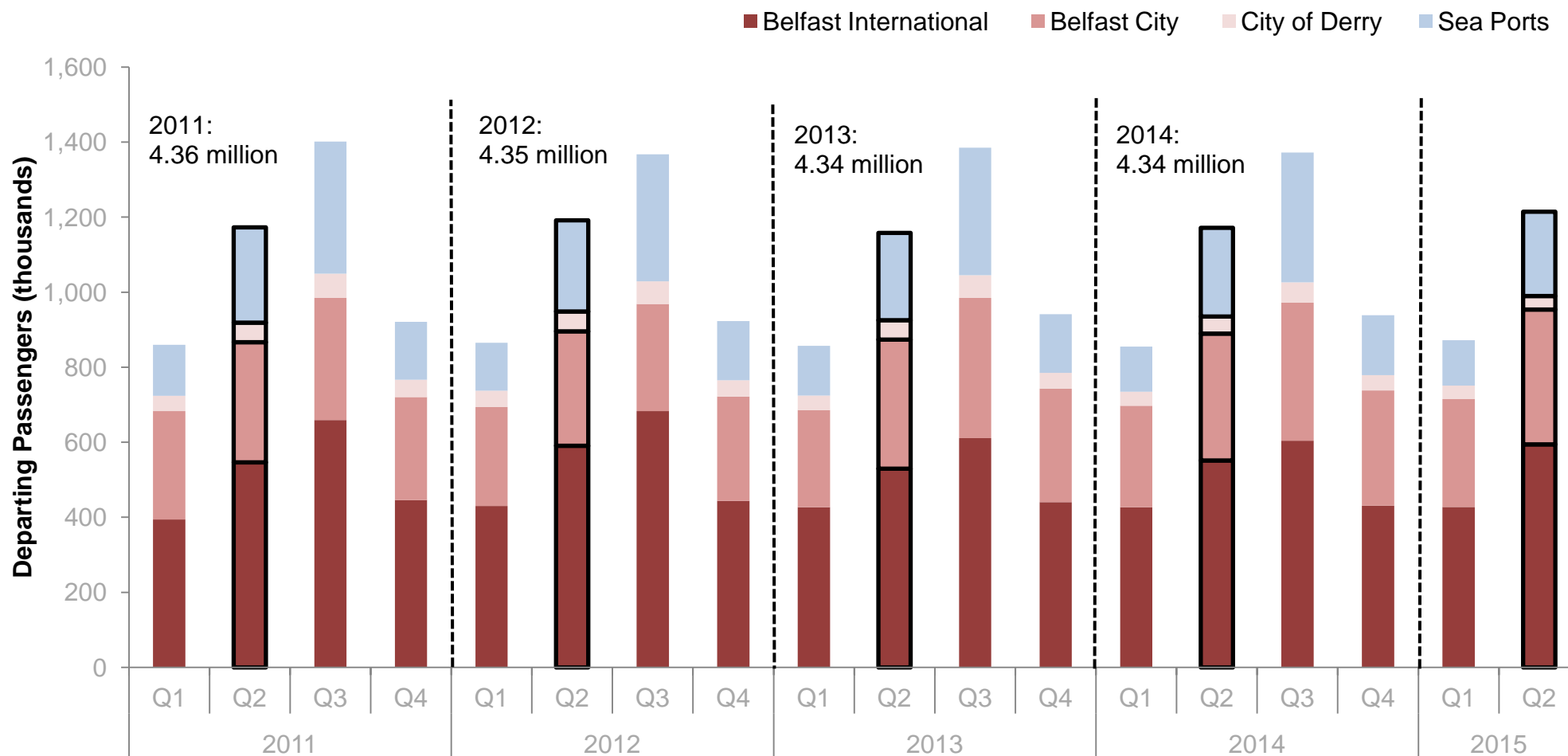
Looking in more detail, overall hotel room occupancy increased by 5 percentage points over the first half of 2015, while room occupancy outside of the hotel sector remained unchanged. It also is evident there are local differences. Belfast hotels reported room occupancy of 80%, well in excess of occupancy rates elsewhere in NI. More detailed occupancy statistics are available on our [website](#).

² Please note that information for bed & breakfasts, guesthouses and guest accommodation is only available from 2013 onward due to a change in sampling methodology.

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 7.

Figure 7: Quarterly outgoing passengers (thousands) Northern Ireland ports (Quarter 1 2011 - Quarter 2 2015)



See [link](#) for data

Latest quarterly statistics show an increase of 4% in outgoing passengers in the second quarter of 2015 (1.21 million) compared to the second quarter of 2014 (1.17 million). 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 8.7 million passengers in 2014 a threefold increase.

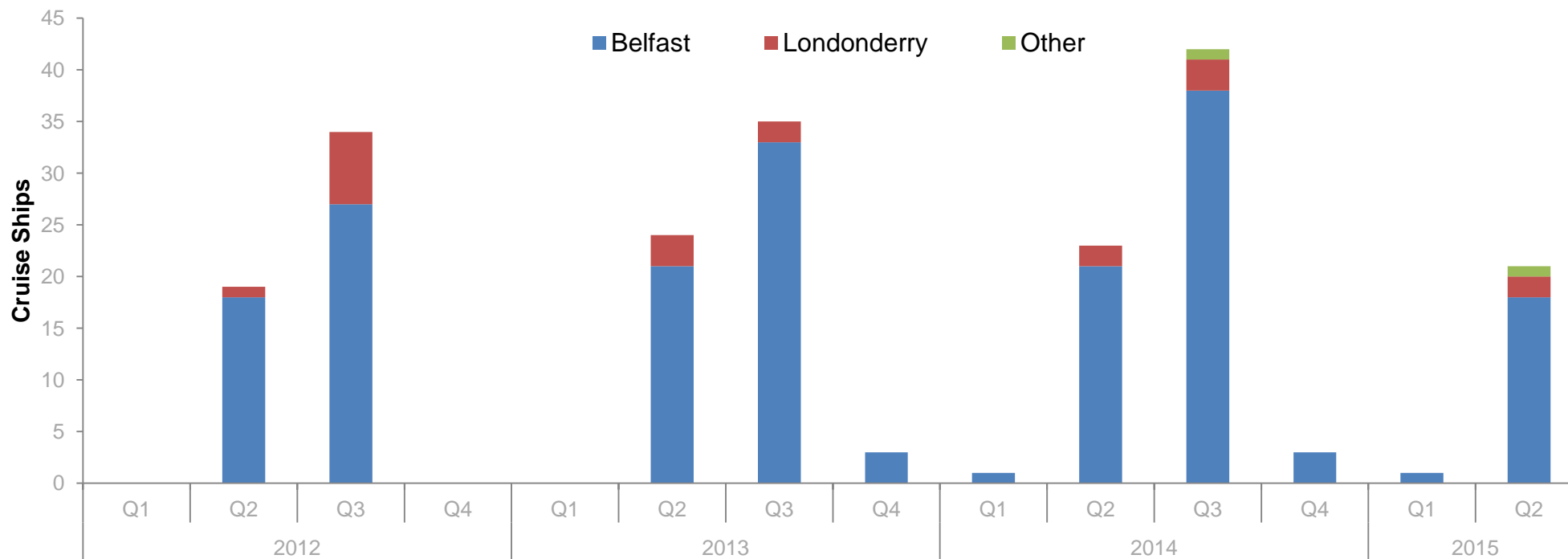
Section 4: Other Sources (Tourism jobs, Cruise Ships)

At March 2015, the Quarterly Employment Survey estimated that there were 55,870 employee jobs in tourism and leisure industries in Northern Ireland. This is 8% of all employee jobs. The number of such jobs has increased by 3% from 54,300 jobs in March 2014. (see note 10)

Cruise Ships Visiting Northern Ireland

Cruise ships are one part of the day trip market for which there are reliable figures. Figure 8 shows the quarterly trend in the number of cruise ships visiting Northern Ireland ports. (see note 13).

Figure 8: Total cruise ship numbers visiting Northern Ireland ports by quarter (Quarter 1 2012 - Quarter 2 2015)



*Other includes Bangor & Warrenpoint. For more information see background note 13.

See [link](#) for data

Although not shown in figure 8, the number of cruise ships docking here has increased markedly over time. In the 2011 calendar year, 32 cruise ships docked in local ports with up to 58,000 passengers and crew onboard. In the 12 months to June 2015, there were up to 110,000 passengers and crew onboard the 67 cruise ships that visited Northern Ireland.

Background Notes

1. This report presents a summary of tourism information in the year ending June 2015. More detailed quarterly data is available on our website at this [link](#). It should be noted that 2015 data are provisional until publication of the 2015 annual tourism statistics report in Spring 2016.
2. Tourism data is derived from a variety of sources, more information on these sources can be found at this [link](#). A full quality report on the NISRA surveys within this publication can be found 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. 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.
5. Tourism estimates are designed to provide timely data on tourism activity for Northern Ireland as a whole. 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.
6. As noted, tourism statistics systems are designed to collect information for Northern Ireland as a whole. However, respondents do indicate where they stay in Northern Ireland during these overnight trips. This allows for some analysis at local area level. NISRA published 2014 overnight trips by Local Government District level in July 2015. These statistics are available on our website at this [link](#).
7. 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 sample size. Generally speaking, the larger the sample the smaller the associated sampling error. Confidence intervals around the estimates of all overnight trips in Northern Ireland are +/-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 this [link](#).
8. 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. Limited information on local overnight trips of people who exit through Republic of Ireland ports is also now collected through a port survey carried out by Central Statistics Office Ireland. NISRA is working with colleagues in the Central Statistics Office, Ireland to develop this source as a means of providing improved information on such trips.
9. Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on overnight trips in Northern Ireland of local residents aged under 16 are excluded. Users should also note that from quarter 2 2015, the Continuous Household Survey methodology has

been refined to collect data at the household rather than individual level. In time this will provide more robust annual domestic tourism statistics. A full explanation of this small methodological change will be included in the 2015 domestic publication.

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 methodology can be accessed at this [link](#).
11. The number of overnight trips in Northern Ireland for the last 12 months (to June 2015) will have been influenced by events that have taken place here (e.g. Irish Open Golf in May 2015). However, the macro statistics presented cannot be used to evaluate the success of these events – evaluation of major events is being undertaken separately by the organisations responsible.
12. This report does not include information on local domestic day trips, 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 and it is planned to develop this information following a user group meeting in early 2016.
13. The vast majority of cruise ships visit Northern Ireland on a single day basis, arriving in the morning and leaving the same 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](#) and [Cruise North West](#) and data relating to Warrenpoint port and Bangor Marina. Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (e.g. Portrush).
14. Follow NISRA on [Twitter](#) and [Facebook](#). We welcome feedback from users on the content, format and relevance of this release. Feedback can be sent by [email](#).

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