

Northern Ireland Annual Tourism Statistics 2014

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4.5m
trips



15.1m
nights



£751m
spent

The key points are:

- in 2014 overnight trips by all visitors (domestic and external) stood at 4.5 million, up 11% on 2013. Associated expenditure increased by 4% (to £751m in 2014);
- in 2014 external (outside NI) overnight trips increased by 4% to 2.2m. However spend linked with these trips fell by 3% to £514m - the strong pound may have influenced this;
- over 15 million visits were made to local visitor attractions in 2014, a 3% increase on 2013. The top attractions of Giant's Causeway (0.788 million visits) and Titanic Belfast (0.634 million visits) both experienced 5% increases;
- hotel room occupancy stood at 65% up from 64% in 2013. In total 1.85 million hotel room nights were sold in 2014;
- last year, 69 cruise ships docked here with up to 121,000 passengers/crew on board. The number of cruise ships docking here has doubled over the last three years; and
- as noted, the increase in all external overnight trips to NI was 4%; this is less than the equivalent increase in the UK (up 6%) or the RoI (up 9%). However, within this group, NI witnessed a 12% increase in external holiday makers, greater than in the UK (up 8%) or RoI (up 9%).

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Contents:

Introduction **2**
 Overnight trips in NI **3**
 Hotels & commercial
 accommodation **9**
 Visitor Attractions **10**
 Cruise Ships **12**
 Jobs in Tourism Industries **12**
 Comparison with other
 countries **13**
 Background Notes **14**

Introduction

This report provides a picture of Northern Ireland tourism in 2014. A variety of statistics are presented, such as estimates of the number of people staying overnight in Northern Ireland, rooms sold in local accommodation, cruise ship visits and visits to Visitor Attractions. The report points towards growth in local tourism and 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 statistic providing a definitive measure. Therefore this report includes a variety of data to paint a more complete picture. A primary aim is to provide information on progress towards the Programme for Government tourism target of 4.2 million overnight trips and associated revenue of £676 million in the year to December 2014.

Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact on tourism. In 2014, Northern Ireland hosted world sporting events such as the opening stages of the Giro D'Italia in May and Carl Frampton's world title boxing fight at the specially constructed Titanic quarter arena in September. The success of our local golfers and the influence of future golfing events (the Irish Open in 2015 and a future British Open) will also have an impact. The success of the local film industry with Game of Thrones showcasing local locations may also have had an effect. However the legacy of the Troubles with less positive images around civil unrest can counter these positive pictures.

Globally, the outbreak of Ebola will have had an effect on travel and tourism last year. The economic situation also influences tourism expenditure with the strength of sterling in 2014 impacting on the level of external visitors' expenditure here. The weather is always an influence with some people finding the local moderate and varied climate appealing. When holidaying in Northern Ireland it is best to heed Discover NI's advice, 'summer months sometimes see prolonged periods of sunshine', 'but at any time of year it is advisable to be prepared for rain.' Finally in the last few years a number of major visitor attractions have been developed most notably Titanic Belfast and a rejuvenated Giant's Causeway Visitor Centre. All of these factors will influence the volume, type and nature of tourism in Northern Ireland.



Copyright TNI

Game of Thrones - Ballintoy



Copyright TNI

Giro d'Italia – Titanic, Belfast



Copyright TNI

Giant's Causeway, Bushmills

Overnight Trips in Northern Ireland (Domestic & External)

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 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.

The headline statistics for overnight trips are:

- in 2014 there were 4.51 million overnight trips in Northern Ireland. This is an increase of 11% in the number of overnight trips from 2013 and is the largest number of overnight trips in the last four years¹;
- expenditure associated with these overnight trips during 2014 was £751 million. This represented an increase of 4% from the £722m in 2013. To put this annual expenditure (£751 million) in context, the 2013 estimate for NI Gross Value Added stood at £33 billion. Indicating that in monetary terms spending on overnight trips broadly equates to around 2.5% of the local economy; and
- associated with the 4.51 million trips were 15.1 million nights spent in Northern Ireland. This is 4% higher than in 2013.

Table 1 shows the trend in these three statistics (trips, nights and spend since 2011). It should be noted that as all trip statistics are survey based they are subject to associated confidence intervals (see [background](#) note 10).

¹ The Northern Ireland Statistics and Research Agency took over measurement of external and domestic overnight trips in 2010/2011. The methods used from 2011 for assessing **domestic** tourism cannot readily be compared with earlier data.

Table 1: Estimated number of overnight trips, nights and expenditure in Northern Ireland 2014

	2011	2012	2013	2014	% Change (2013-14)
Overall Trips (000s)	3,968	4,002	4,073	4,512	+10.8%
<i>Domestic (000s)</i>	2,036	2,018	1,980	2,335	+17.9%
<i>External (000s)</i>	1,932	1,984	2,093	2,177	+4.0%
Overall Nights (000s)	14,690	13,791	14,487	15,065	+4.0%
<i>Domestic (000s)</i>	4,698	3,906	4,577	5,049	+10.3%
<i>External (000s)</i>	9,992	9,885	9,910	10,016	+1.1%
Overall Expenditure (£M)	641	689	722	751	+4.1%
<i>Domestic (£M)</i>	178	201	192	238	+24.0%
<i>External (£M)</i>	463	488	531	514	-3.2%

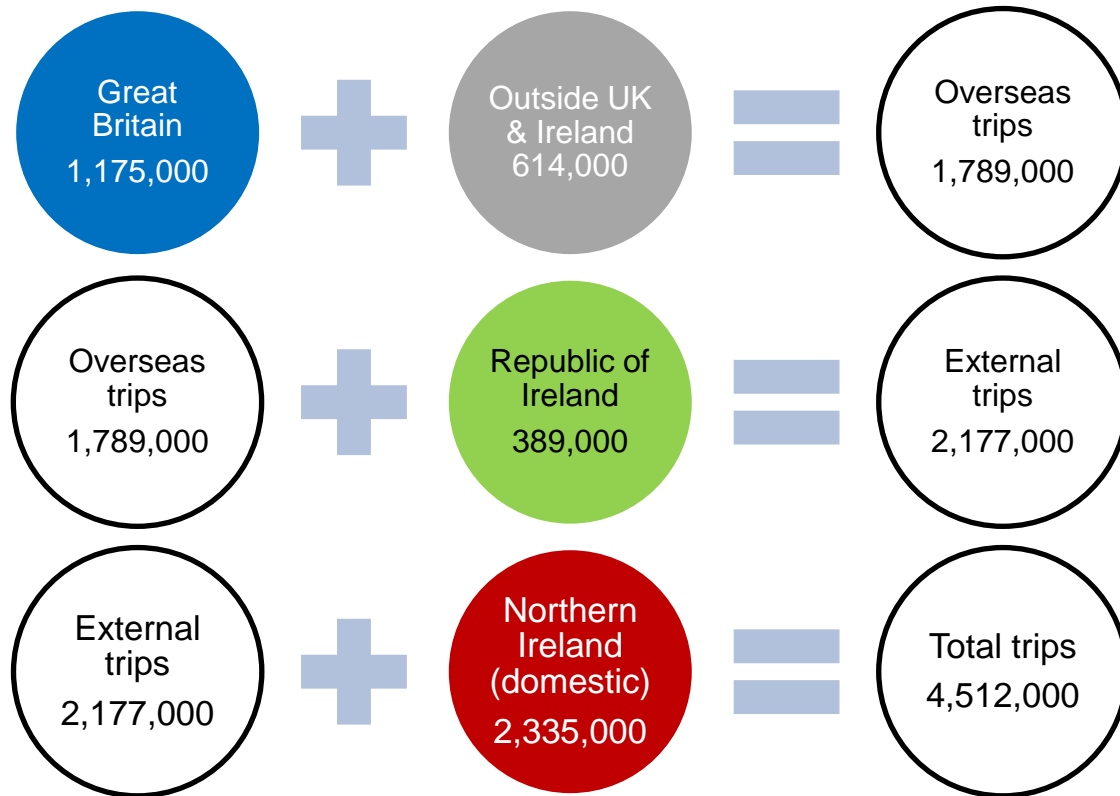
Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA.

Full information on External overnight trips to Northern Ireland can be found at the following link: [External Visitors to Northern Ireland](#)
Full information on Northern Ireland domestic tourism can be found at the following link: [Domestic Tourism](#)

Place of origin

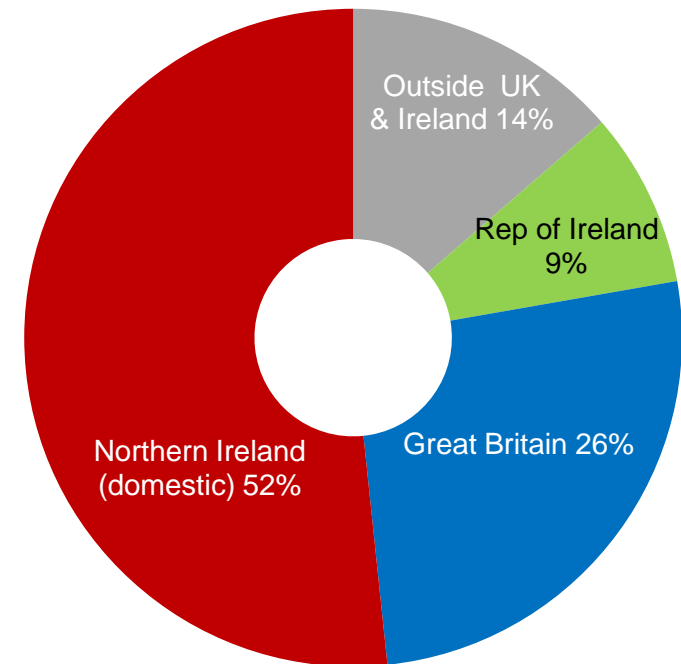
A further important part of the assessment of tourism is the place of origin of visitors to Northern Ireland. Figures 1 & 2 give some detail on this for 2014.

Figure 1: Overnight trips by place of origin (2014)



Rounded to the nearest thousand

Figure 2: Breakdown by place of origin (2014)



In total just over half (52%) of all overnight trips (2.3 million) were made 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 made by people living in Great Britain, 9% (0.4 million) by people from the Republic of Ireland and the remaining 14% (0.6 million) by people from outside the UK and Ireland.

In total 40% or 1.8 million overnight trips to Northern Ireland were made by people who live outside the island of Ireland (Great Britain and Outside UK & Ireland – labelled overseas trips in Figure 1). Within these trips, the vast majority of Great Britain visitors (93%) arrive through Northern Ireland ports. In contrast two thirds (67%) of visitors from Outside UK & Ireland come through Republic of Ireland ports.

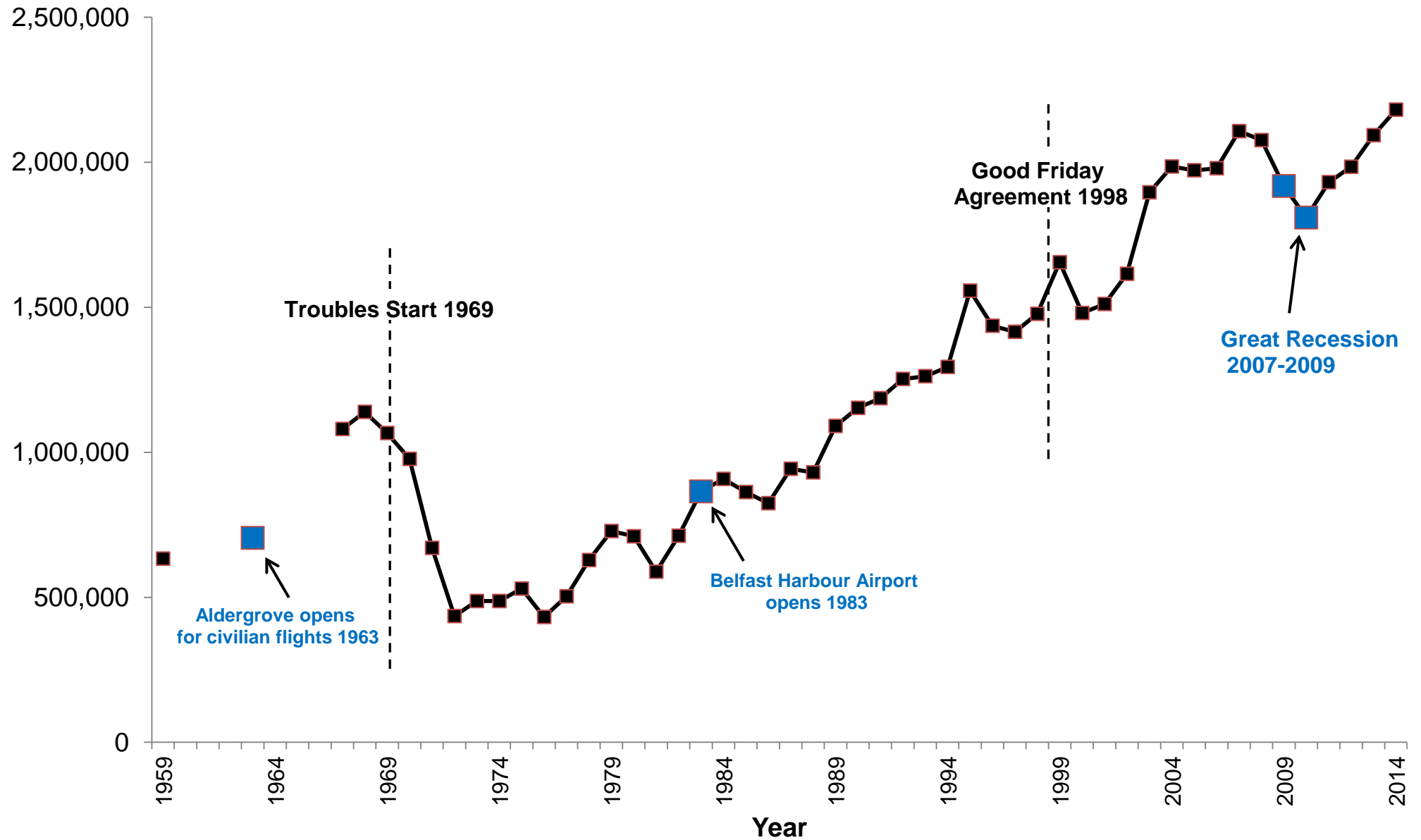
External trips

A major focus of the tourism industry is external visitors (outside Northern Ireland). In total there were 2.2 million external overnight trips in 2014, a 4% rise from 2013. It should be noted that expenditure linked with these trips did not rise in 2014, indeed it fell by 3% from £531m in 2013 to £514m in 2014. Clearly the strong pound may have been one influence.

When assessing change in the number of external overnight trips, a longer time trend can be informative. Figure 3 overleaf shows the number of external overnight visitors by year from 1959 to 2014². The graph shows the impact of the start of the troubles, as well as the impact of the recent worldwide great recession in 2008-9. This second factor was not unique to Northern Ireland, indeed it had a similar impact globally.

² There have been minor changes to the methodology and sources used to measure external overnight trips to Northern Ireland but the graph still paints a representative picture of the trend over time.

Figure 3: Annual external overnight trips to Northern Ireland (1959-2014)



Sources: 1959-2010 Northern Ireland Tourist Board; 2010 onwards Northern Ireland Statistics and Research Agency
 Note: Figures for residents of the Republic of Ireland have been included from 2000 onwards

Reason for Overnight Trip

Survey respondents are also asked the reason they stayed overnight; the results are shown in Figure 4. The two mainstays of the Northern Ireland market are holiday/leisure and visiting friends and relatives. The largest increases in overnight trips between 2013 and 2014 by reason for visit were holiday makers (+21%) and those visiting friends and relatives (+13%). This is shown in Figure 5 below.

Figure 4: Reason for Overnight Trip, 2014 – all overnight trips

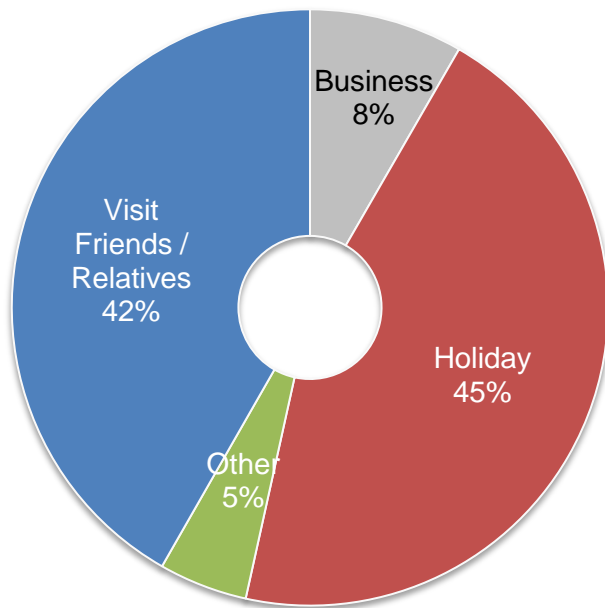
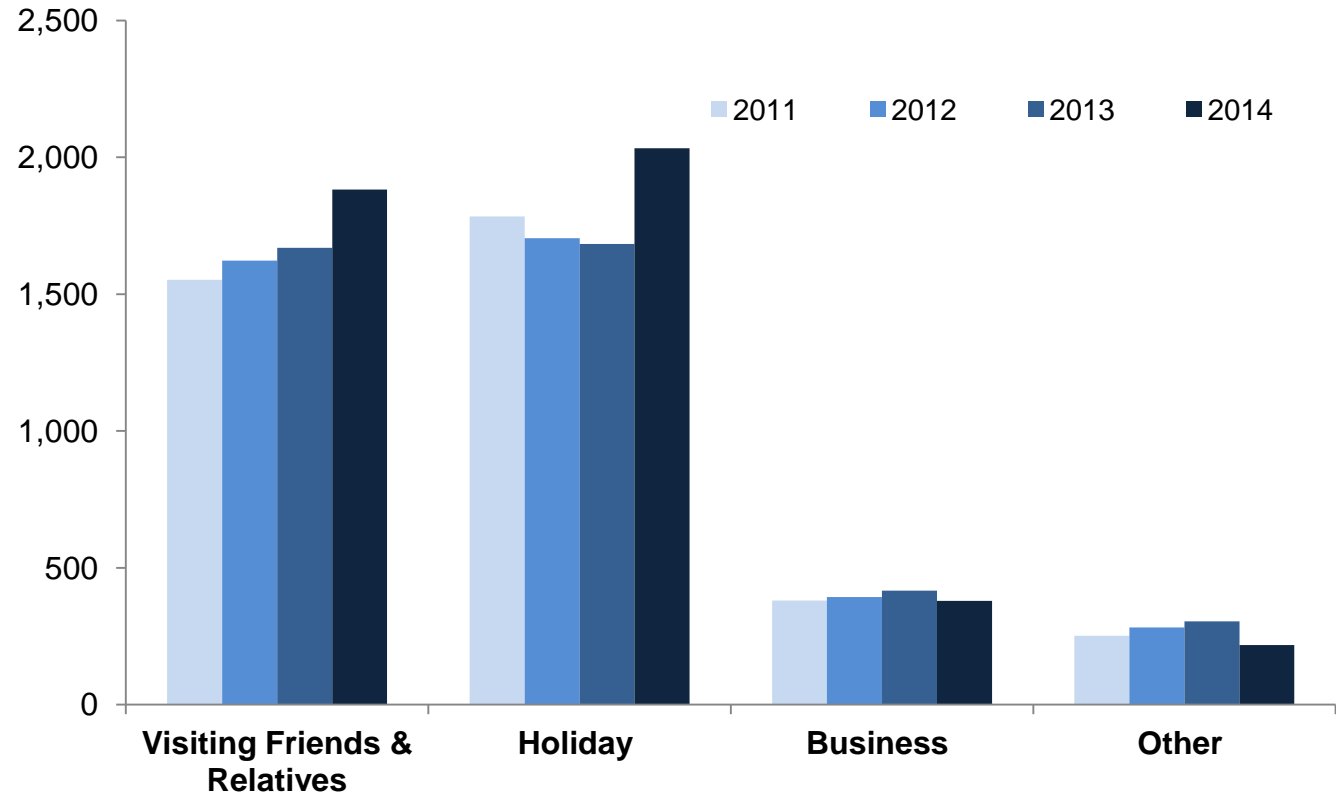


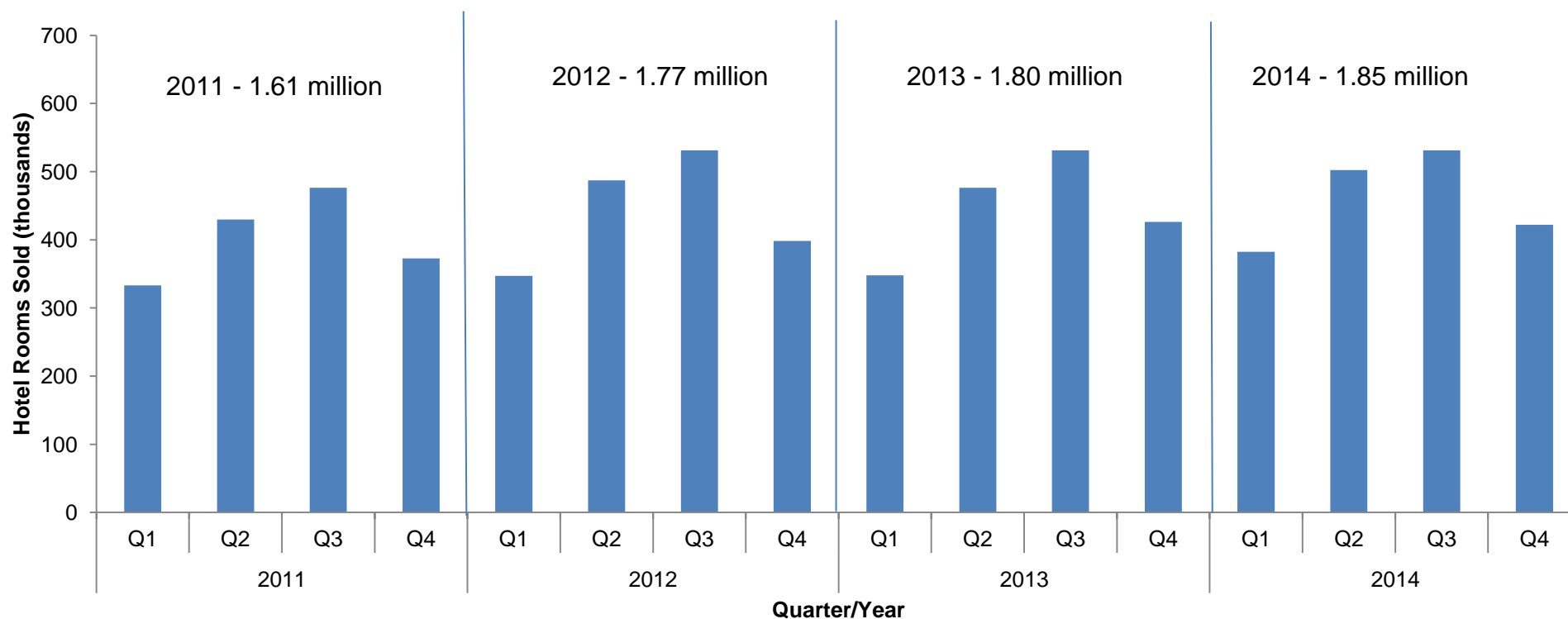
Figure 5: Overnight trips (thousands) by reason for visit (2011-2014)



Hotel room-nights and other commercial accommodation

Alongside passenger and household surveys, NISRA conducts a monthly occupancy survey of local hotels and commercial accommodation (e.g. bed & breakfasts, guest houses and guest accommodation). Figures for 2014 show the total number of hotel room nights sold was 1.85 million, a 3% increase from the 1.80 million room nights sold in 2013 – see Figure 6 for the quarterly trend which shows the seasonality in this market.

Figure 6: Hotel room nights sold (Q1 2011- Q4 2014)



In 2014, average room occupancy in hotels was 65%, an increase of 1 percentage point from 2013. Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was 28%, a decrease of 2 percentage points on 2013. The annual self catering unit occupancy for 2014 was 33%, an increase of 1 percentage point on 2013.

Full information on Northern Ireland accommodation occupancy can be found at the following link: [NI Occupancy Surveys](#)

Full information on self catering accommodation in Ni can be found at the following link: [NI Self Catering Survey](#)

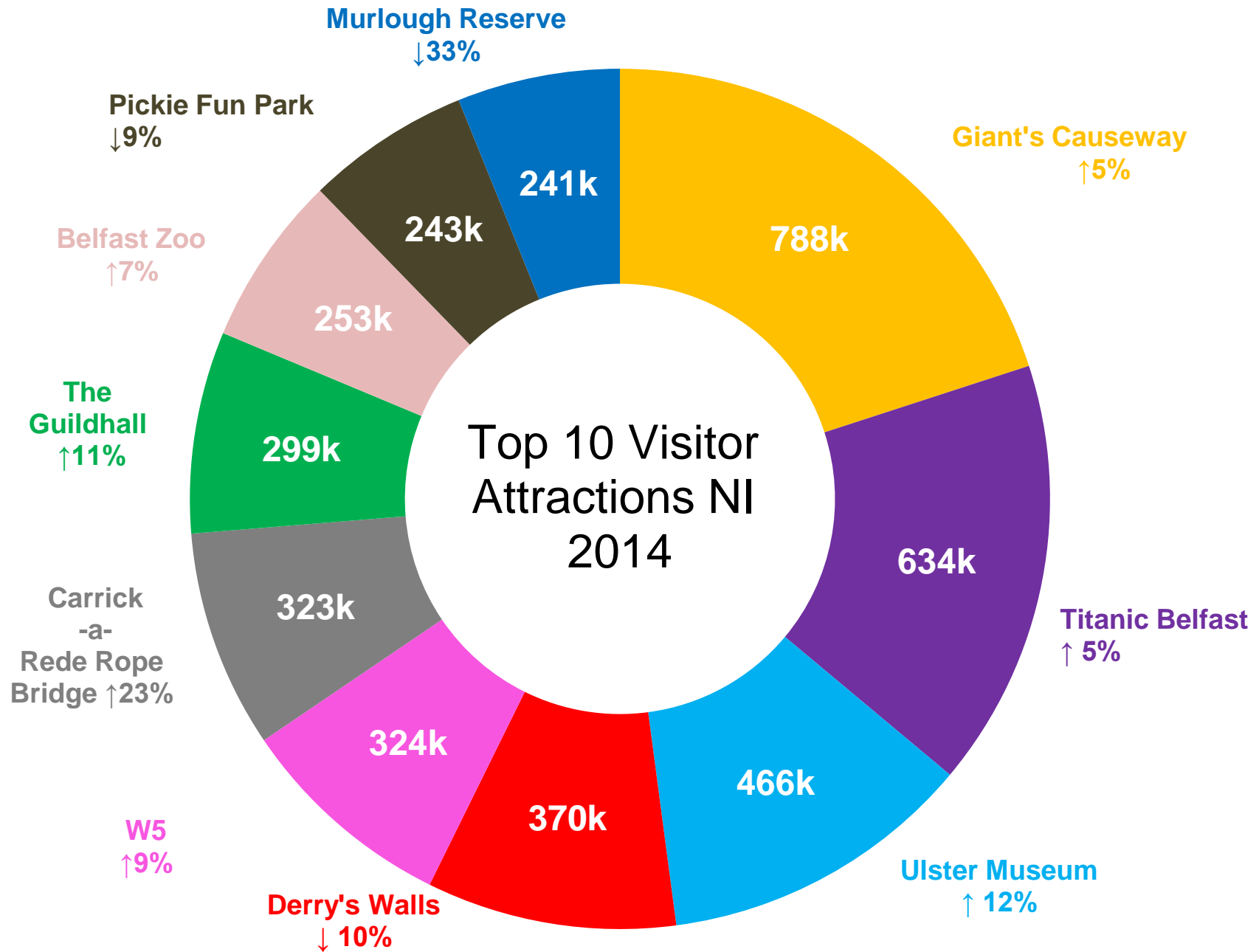
Visitor Attractions

To provide a further picture of tourism demand NISRA run an annual survey of all Visitor Attractions in Northern Ireland. In total there were 389 attractions surveyed at the end of December 2014. Contact details of all attractions were obtained from Discover Northern Ireland. A total of 241 attractions replied to the survey, of these 188 provided data for analysis. The results show that:

- there were 15.3 million visits made to visitor attractions during 2014;
- in total 168 attractions returned data with visitor figures for 2013 and 2014. These showed that there was a 3% increase in visitor numbers between 2013 and 2014;
- excluding country parks, the Giant's Causeway World Heritage Site attracted the highest number of visitors with 788,000 visitors during 2014. This was a 5% increase in the number of visitors when compared to 2013; and
- Titanic Belfast attracted the second highest number of visitors (634,000 visitors), also showing a 5% increase in the number of visitors when compared to 2013.

Figure 7 overleaf shows the results for the top ten visitor attractions in 2014 excluding country parks. The figures show the relative importance of the two headline attractions in Northern Ireland.

Figure 7: Top Ten Visitor Attractions 2014 (excluding country parks/parks/forests/gardens)



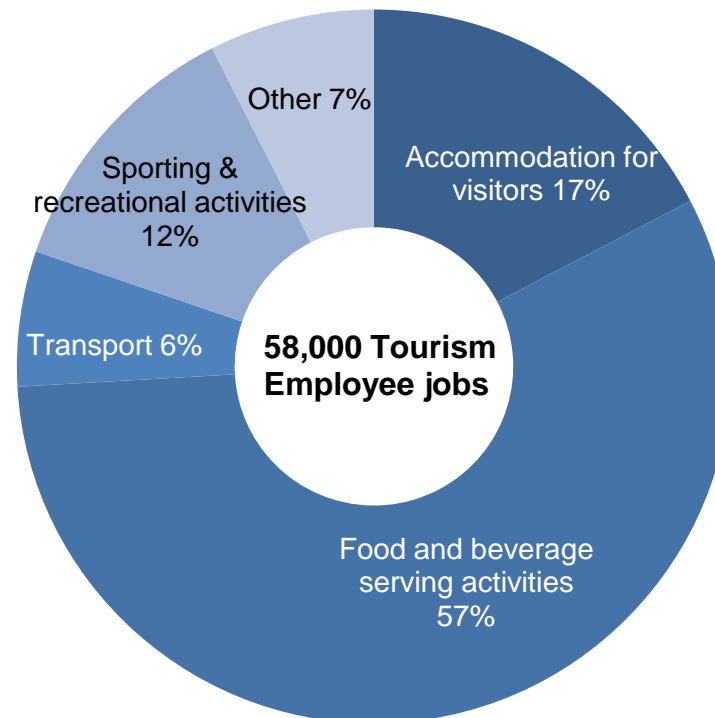
Cruise Ships Docking in Northern Ireland Ports

The number of cruise ships docking in Northern Ireland has increased markedly over time. In 2011, 32 cruise ships docked in Northern Ireland with up to 58,000 passengers and crew onboard. In 2014, there were over twice the number of ships (69) and passengers/crew (up to 121,000). Of these ships, 63 docked in Belfast, 5 in Londonderry and 1 in Warrenpoint. Although there is no data available on the number of passengers or crew who disembark, or their associated expenditure, total capacity has doubled. (see [background](#) note 12 for further information).

Jobs in Tourism Related Industries

The most recent NI Census of Employment figures indicated a 3% increase in employee jobs in tourism related industries between 2011 and 2013. This increase was mainly in 'accommodation for visitors' and 'food and beverage serving' industries. Around one in ten of all employee jobs are in tourism related industries. A breakdown of these 58,000 jobs is given in Figure 8.

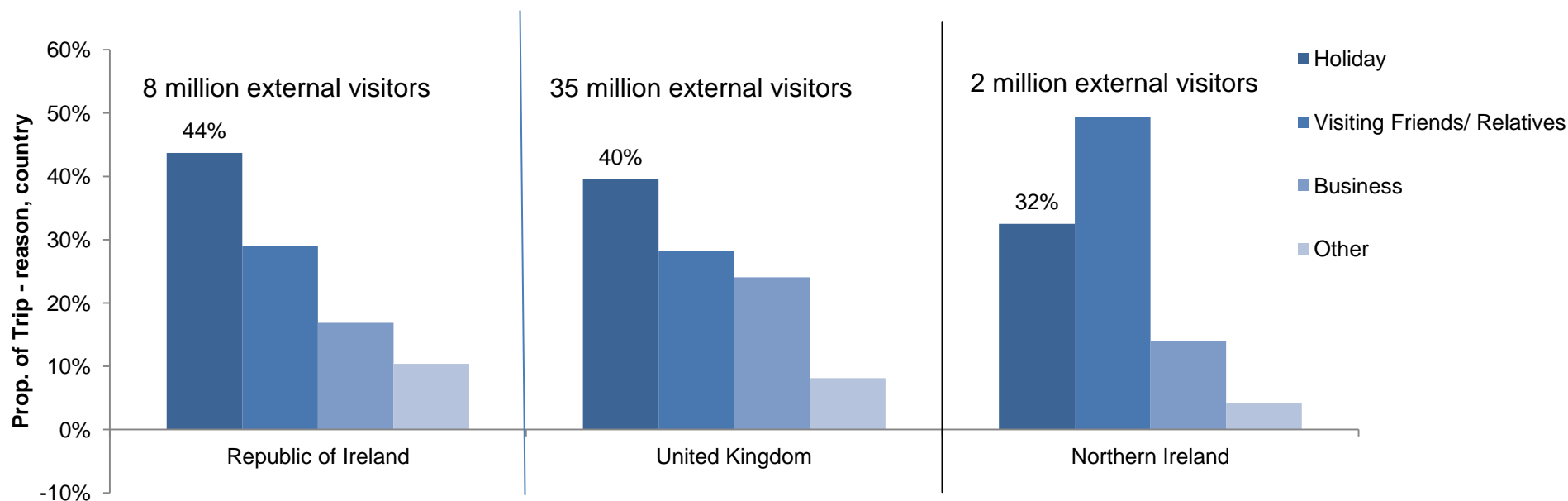
Figure 8: Employee Jobs in Tourism Related Industries, 2013



Comparison with UK / Republic of Ireland

It is informative when assessing tourism to compare Northern Ireland to the United Kingdom as a whole and the Republic of Ireland. Figure 9 shows the proportion of external overnight trips in 2014 by country and reason for visit. Between 2013 and 2014, external holiday makers to NI increased by 12%-a larger increase than RoI and UK (9% and 8% respectively). However, they account for proportionately less in NI (32%) than the other countries (44% RoI and 40% UK). The statistics point to the continued importance of visiting friends and relatives for the NI market.

Figure 9 Proportion of external overnight trips by reason in UK, Republic of Ireland and Northern Ireland, 2014



The United Nations World Tourism Organisation tourism barometer indicates there were 1.138 billion international tourism trips during 2014, up 5% on the previous year. During 2014, all world regions saw growth ranging from 2% in Africa to 7% in the Americas. Europe experienced growth of 4%. During 2014, Northern Ireland welcomed a record number of external overnight trips, with a 4% increase in numbers from 2013 to 2014. In contrast, the Republic of Ireland experienced a 9% increase and the UK a 6% increase.

Background Notes

1. This report presents a summary of tourism statistics for Northern Ireland. More detailed data are available on our website at this [link](#). The next tourism statistics release will be in July for the 12 months ending March 2015. These results will be made available online in a tabular format only.
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 aimed 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. The published tourism estimates in this report indicate that both sets of targets for 2014 have been met.
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. NISRA aims to publish the results of this research in summer 2015.

6. Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on overnight trips in Northern Ireland residents aged under 16 are excluded.
7. 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.
8. 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. The most recent 2013 results published at this level can be found at this [link](#) and a data visualisation tool is available at this [link](#). The 2014 Local Government results will be published in July 2015.
9. 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 implications can be found at this [link](#).
10. 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 +/- 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](#).

11. 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](#) .
12. 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) – statistics from these visits are not included in this report due to data availability issues.
13. Follow NISRA on [Twitter](#) and [Facebook](#).

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