

NORTHERN IRELAND DOMESTIC TOURISM

(JANUARY-DECEMBER 2012)

Published 04/07/13

This report provides the analysis of the most recent (January-December 2012) annual information for domestic tourism in Northern Ireland. The figures show:

- There were 1,981,000 overnight trips taken by NI residents within NI in 2012, showing a 2% decrease when compared to 2011. These trips accounted for 3,856,000 nights (-18%) and an associated expenditure of £195 million (+10%)
- Although there was a fall of 15% in NI residents taking overnight trips for holiday/pleasure/leisure between 2011 and 2012, there was an increase in the amount that was spent on these trips (+11% to £134 million)
- There was a shift in the total number of overnight trips taken by NI residents using Hotels or Motels for their accommodation (+11% trips and +9% nights, but a fall in the total spend during these trips (-9%))
- There were 8.4 million leisure day trips taken by NI residents with NI during 2012 (an increase of 17% when compared to 2011). Of these, 2.4 million were tourism day trips (-7%), which accounted for £66 million of the total day trips expenditure (+6%).

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Trips taken by NI residents

This report provides an analysis of domestic tourism within NI by local residents and visits outside NI in 2011 and 2012. By focusing on domestic tourism, the report only provides a partial picture of all tourist activity in 2012. This domestic tourism represented 50% of all overnight visits, of which there were 3.97 million (domestic and external) in 2012. Expenditure by domestic tourists comprised 29% of all tourism expenditure (£683m) in 2012. A full picture of all tourism activity is provided in the Northern Ireland Annual Tourism Statistics 2012 publication

Information on domestic tourism is collected through the Continuous Household Survey, which is a face-to-face survey of a systematic random sample of the Northern Ireland (NI) population. The survey has been carried out since 1983 and is designed, conducted and analysed by the Central Survey Unit of the Northern Ireland Statistics and Research Agency (NISRA). The survey has included questions on overnight and day trips taken by NI residents since April 2010 and provides information on visits both within and outside NI.

Summary

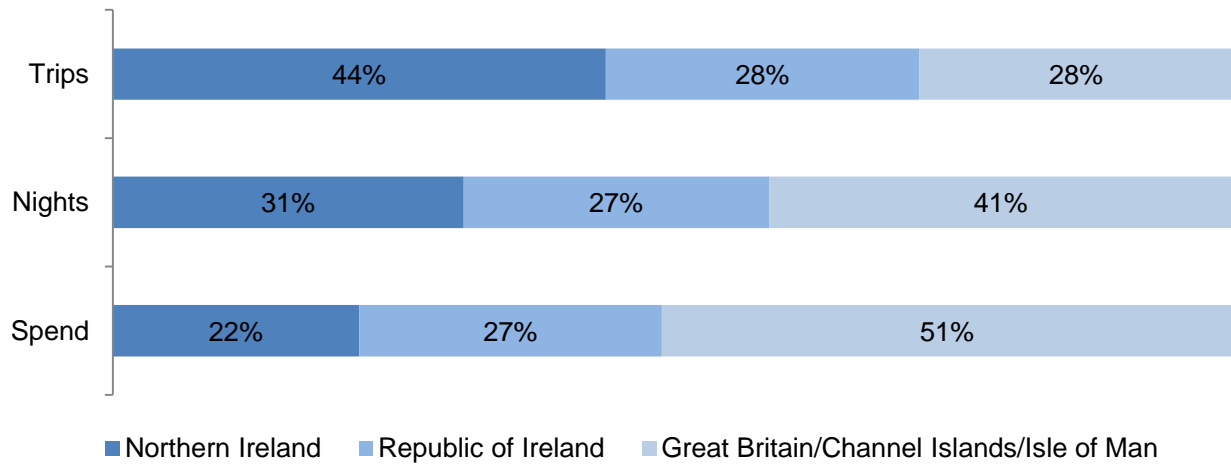
NI residents took an estimated 4.5 million overnight trips in 2012 to NI, Great Britain including Channel Islands and Isle of Man (GB) and Republic of Ireland (RoI), 4% less than in 2011 (4.7 million overnight trips). Figure 1 shows that during 2012, over two-fifths (44%) of overnight trips taken by NI residents within the UK and RoI were in NI (similar to 43% in 2011). There was a 2% decrease in the total number of overnight trips within NI, resulting in an 18% decrease in the number of nights, but a 10% increase in the associated spend. Similar numbers of overnight trips were taken in the RoI and in GB (1.3m). Expenditure on overnight trips in NI, GB and RoI increased slightly from £841m in 2011 to £875m in 2012. (Table1).

Overnight Trips taken by NI residents by destination

Trips within NI accounted for 31% of all nights, and 22% of all spend on overnight trips within the UK and Ireland during 2012. (Figure 1) This represented a fall in the proportion of nights (37% in 2011), but remained similar in proportion of spend (21% in 2011).

Figure 1 also shows that during 2012, 44% of overnight trips taken by NI residents within the UK and RoI were in NI (similar to 43% in 2011). 28% were in the RoI and 28% in GB. This showed little difference from 2011(Figure 2).

Figure 1 Overnight trips taken by NI residents by destination, percentage



Total nights spent in NI fell by 18% from 4.7m in 2011 to 3.9m in 2012. However, total spend increased by 10% from £177m in 2011 to £195m in 2012. Overnight trips to RoI however, showed a decrease in both nights (-7%) and spend (-9%). For overnight trips to GB, the overall number of trips showed no change over the year, but there was a 19% increase in the total number of nights to 5.1 million and an increase of 10% to £446 million spend on the trips (Table 1 and figure 2).

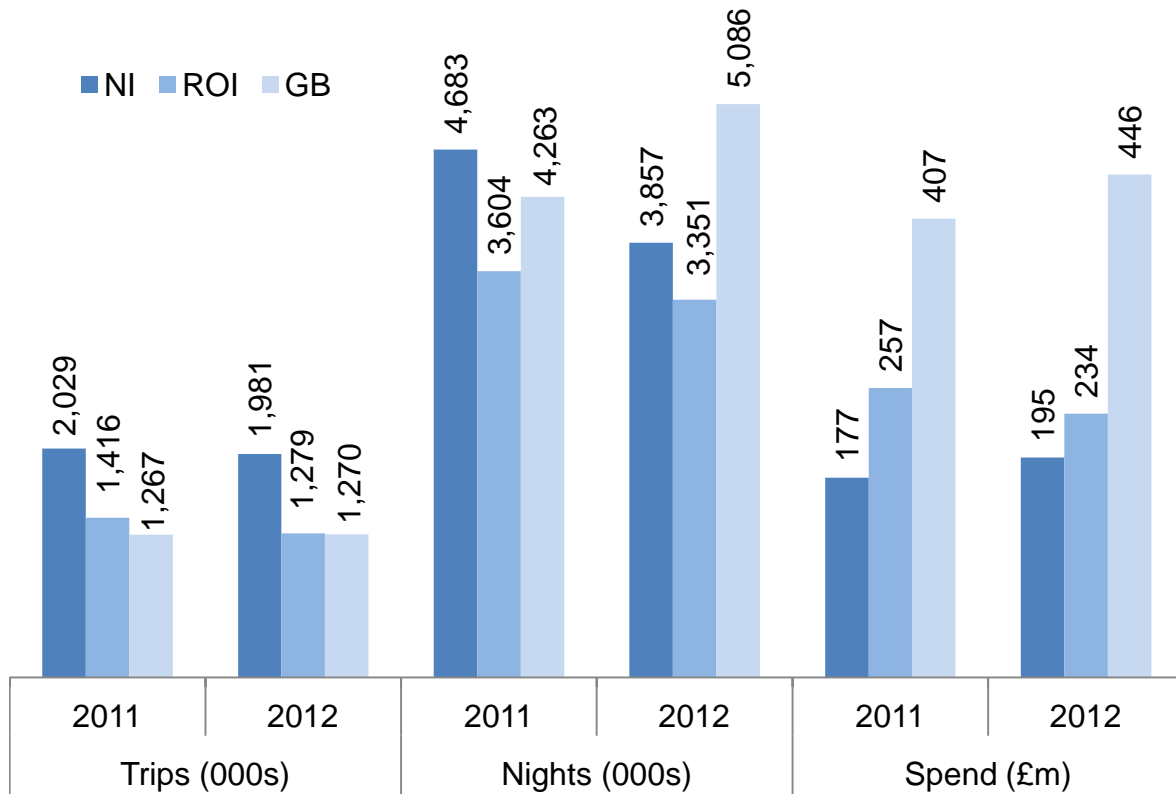
Table 1: Overnight trips taken by NI residents within UK and ROI 2011-2012

	Total Trips (000s)	Total Nights (000s)	Total Spend (£1m)	Average length of stay	Average spend per trip (£)	Average spend per night (£)
Northern Ireland						
2011	2,029	4,683	177	2.3	87	38
2012	1,981	3,856	195	1.9	99	51
Change over yr (%) ¹	-2	-18	+10	-16	+13	+34
Republic of Ireland						
2011	1,416	3,603	257	2.5	181	71
2012	1,279	3,351	234	2.6	183	70
Change over yr (%) ¹	-10	-7	-9	+3	+1	-2
Great Britain/Channel Islands/Isle of Man						
2011	1,267	4,263	407	3.4	321	95
2012	1,270	5,086	446	4.0	351	88
Change over yr (%) ¹	0	+19	+10	+19	+9	-8
Total NI/ROI/GB						
2011	4,712	12,550	841	2.7	178	67
2012	4,530	12,294	875	2.7	193	71
Change over yr (%) ¹	-4	-2	+4	+2	+8	+6

Note¹ Percentage change calculated using unrounded figures

Figure 2 shows the overnight trips and related nights and spend taken by NI residents 2011-2012 by destination.

Figure 2: Overnight trips taken by NI residents 2011-2012



Overnight Trips within Northern Ireland

During 2012, 2.029 million overnight trips were taken within NI by NI residents with a total of 3.9 million nights and an associated expenditure of £195 million (Figure 3). This represented a 2% decrease in the number of trips (from 1.981 million in 2011), an 18% decrease in the number of nights (from 4.7 million in 2011), but an increase of 10% in the total spend (from £177 million in 2011).

In 2012, the average duration of overnight trips within NI was 1.9 nights with an average spend per trip of £99 and an average spend per night of £51. This represented a decrease in the duration of trips (-16% from 2.3 nights in 2011), but an increase in the average spend (+13% ⁽¹⁾ from £87 per trip and +34% from £38 per night).

Figure 3: Overnight trips taken by NI residents within NI

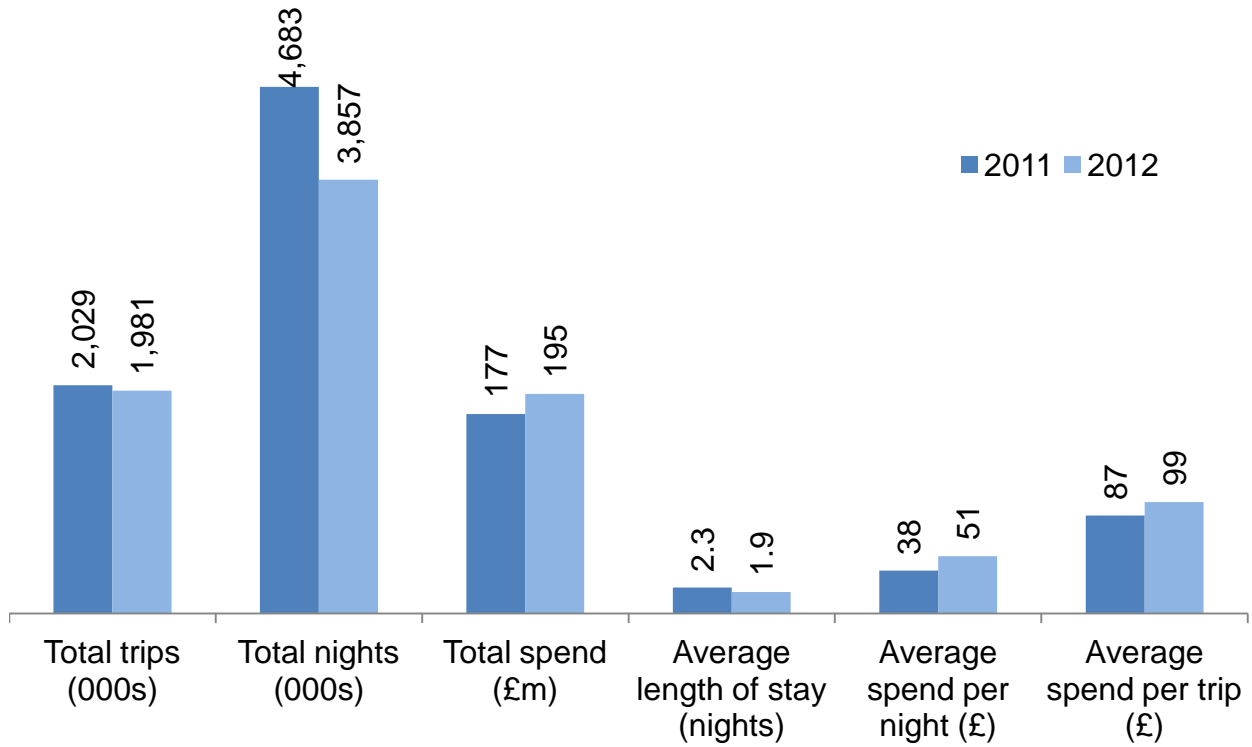


Figure 4: Overnight trips taken by NI residents within NI by purpose 2011-2012

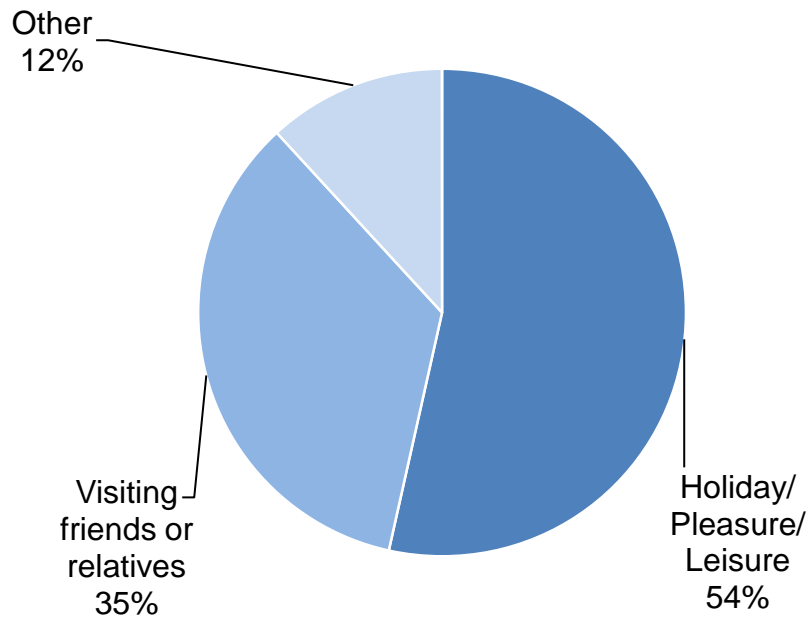


Figure 4 and Table 2 show that during 2012, 54% of trips taken by NI residents within NI were holiday/pleasure/leisure trips, 35% were to visit friends or relatives and 12% for other reasons. Holiday/pleasure and leisure accounted for the largest proportion of trips, nights and spend by NI residents in NI during January – December 2012.

Holiday/Pleasure/Leisure accounted for the longest duration of trips (2.3 nights) and largest average spend per trip (£126). Average spend per night for holiday/pleasure/leisure (£56) was almost 1.7 times the average spend per night for those visiting friends/relatives (£33)(Table 2)

Table 2: Overnight trips taken by NI residents within NI by purpose of trip, 2011-2012

	Total Trips (000s)	Total Nights (000s)	Total Spend (£1m)	Average length of stay	Average spend per trip (£)	Average spend per night (£)
Total						
2011	2,029	4,683	177	2.3	87	38
2012	1,981	3,856	195	1.9	99	51
Change over yr (%) ¹	-2	-18	+10	-16	+13	+34
Holiday/Pleasure/ Leisure						
2011	1,246	3,246	120	2.6	97	37
2012	1,060	2,399	134	2.3	126	56
Change over yr (%) ¹	-15	-26	+11	-13	+31	+50
Visiting Friends/Relatives						
2011	570	1,077	34	1.9	60	32
2012	686	1,071	36	1.6	52	33
Change over yr (%) ¹	+21	-1	+5	-17	-13	+5
Other						
2011	214	361	23	1.7	108	64
2012	235	386	26	1.6	110	67
Change over yr (%) ¹	+10	+7	+13	-2	+3	+5

Note¹ Percentage change calculated using unrounded figures

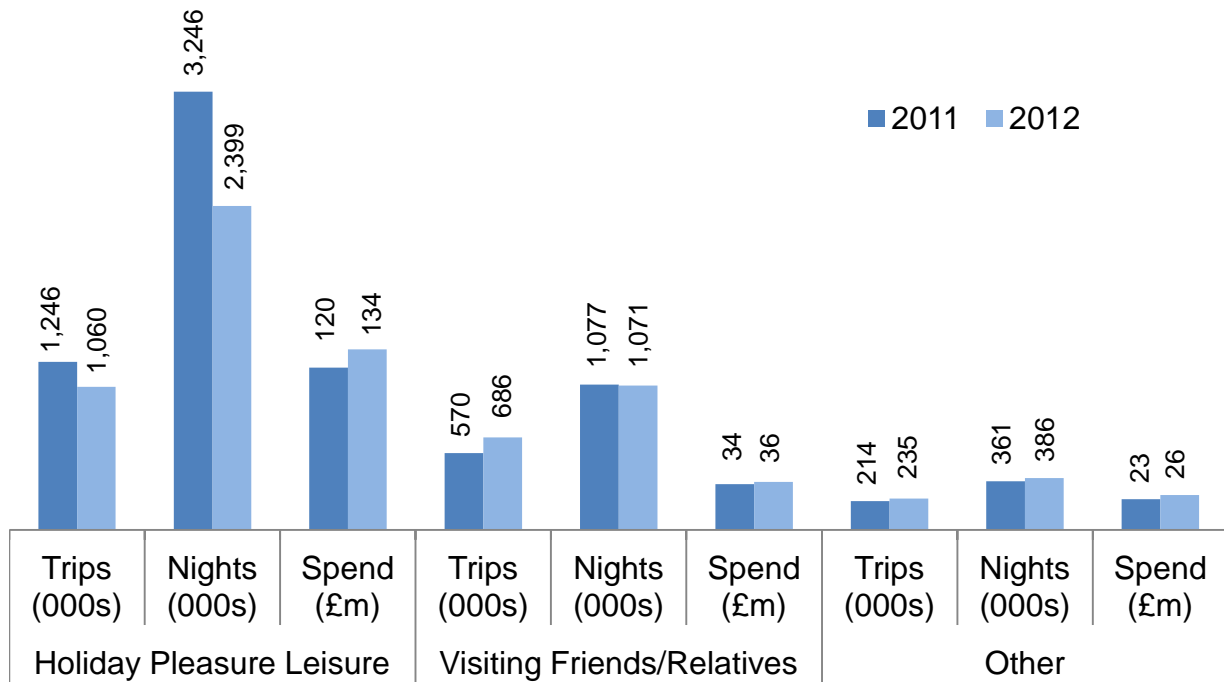
Although there was a fall of 15% in NI residents taking overnight trips for holiday/pleasure/leisure between 2011 and 2012, there was an increase in the amount that was spent on these trips (+11% to £134 million). Average spend per night on holiday/pleasure/leisure trips rose sharply (by 50%) between the two years.

There was an increase of over one fifth (21%) in NI residents taking overnight trips to visit friends/relatives between 2011 and 2012, which resulted in an increase of 5% in spend during these overnight trips (£34 to £36 million in 2012). (Table 2)

The number of other (including business) trips grew by 10% between the two years, with a 13% increase in expenditure on these trips.

Of the £18m increase in spend on overnight trips in NI, more than three-quarters (£13m) was due to growth in holiday/pleasure/leisure trip spend.

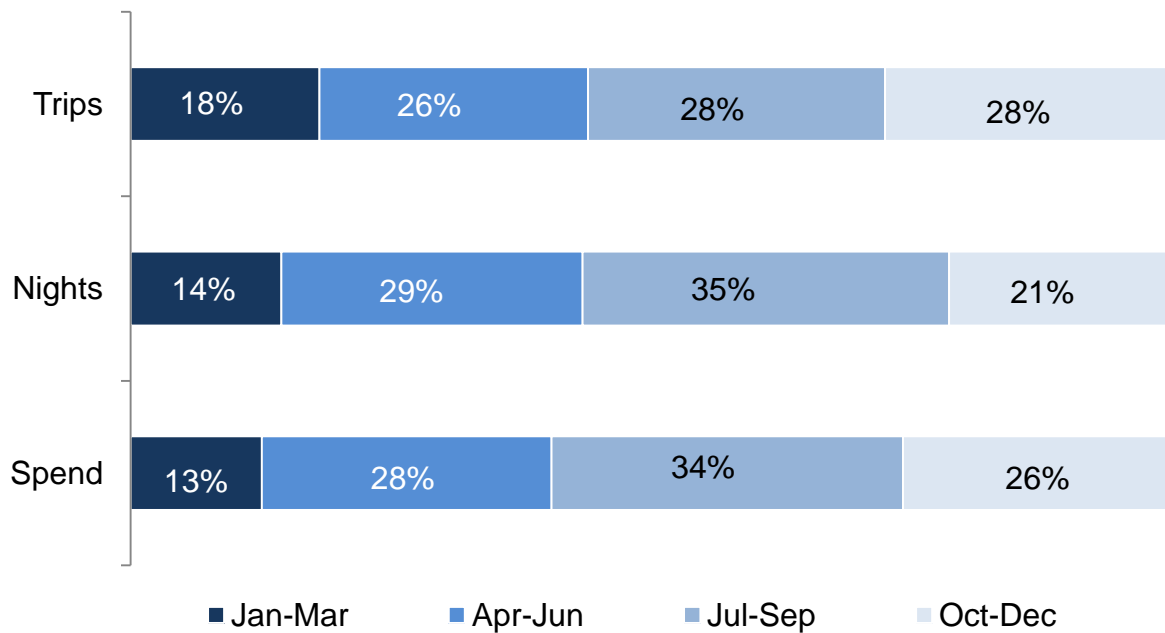
Figure 5: Overnight trips taken by NI residents within NI by purpose of trip, 2011-2012



Seasonal estimates of Overnight trips within NI

During 2012, 28% of overnight trips within NI were taken during July-September and a further 28% during October-December. Approximately a third (35%) of nights and spend (34%) occurred during the July-September period (Figure 6).

Figure 6 Estimated overnight trips taken by NI residents within NI during 2012



There was a rise in the number of trips taken in the January-March (+20%) and October-December (+17%) periods, but a fall in the number of trips taken between July and September (-22%) compared to the corresponding periods in 2011. Total spend increased by over a third (+36%) in the April-June period, but the biggest increase in average spend per night (+68%) occurred in the July-September period.

Table 3 Estimated overnight trips taken by NI residents within NI by period 2011

	Total Trips (000s)	Total Nights (000s)	Total Spend (£1m)	Average length of stay	Average spend per trip (£)	Average spend per night (£)
January - March						
2011	299	465	23	1.6	77	50
2012	359	565	24	1.6	68	43
Change over yr (%) ¹	+20	+22	+6	+1	-12	-13
April - June						
2011	536	1,166	40	2.2	74	34
2012	510	1,130	54	2.2	106	48
Change over yr (%) ¹	-5	-3	+36	+2	+43	+41
July - September						
2011	728	2,236	66	3.1	91	30
2012	565	1,321	66	2.3	116	50
Change over yr (%) ¹	-22	-41	-1	-24	+28	+68
October - December						
2011	467	816	48	1.7	103	59
2012	548	840	51	1.5	92	60
Change over yr (%) ¹	+17	+3	+6	-12	-10	+3

Notes: 1) Percentage change calculated using unrounded figures

2) Estimates based on a sample size of 31-50 appear shaded as

Figure 7 shows trends in overnight trips, nights and spend during the overnight trips taken by NI residents within NI from 2009 – 2012, using TNS (research company) data for 2009-2010 and the Continuous Household Survey from 2011 onwards.

Figure 7: Estimated overnight trips taken by NI residents within NI by quarter 2009-2012.

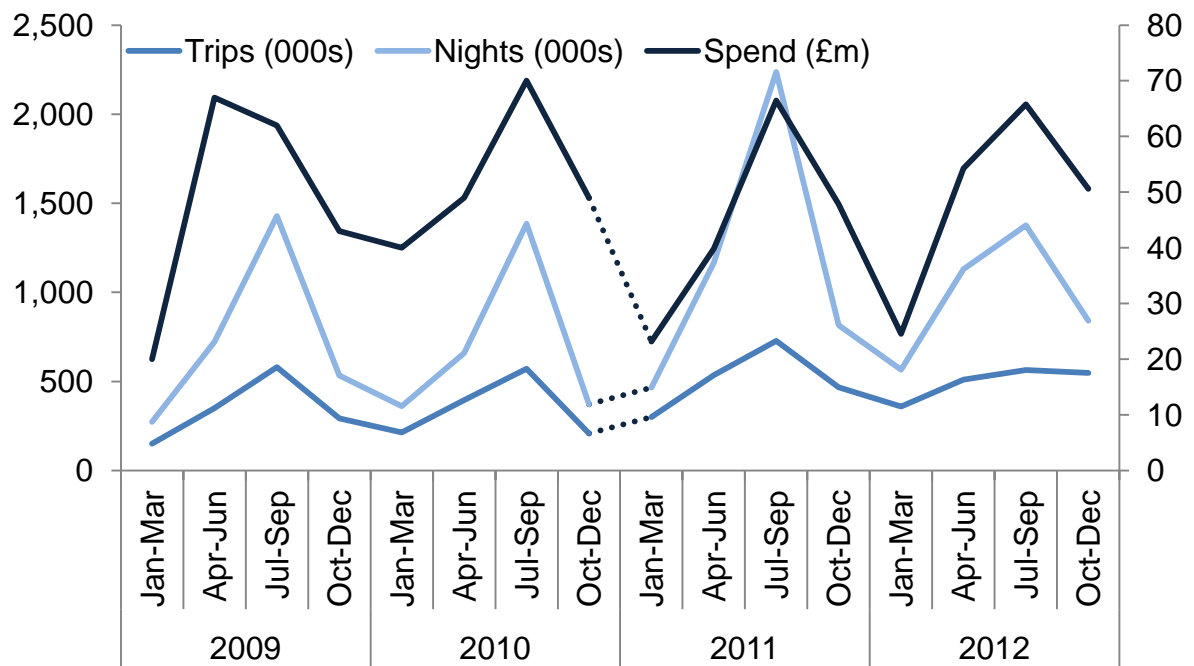
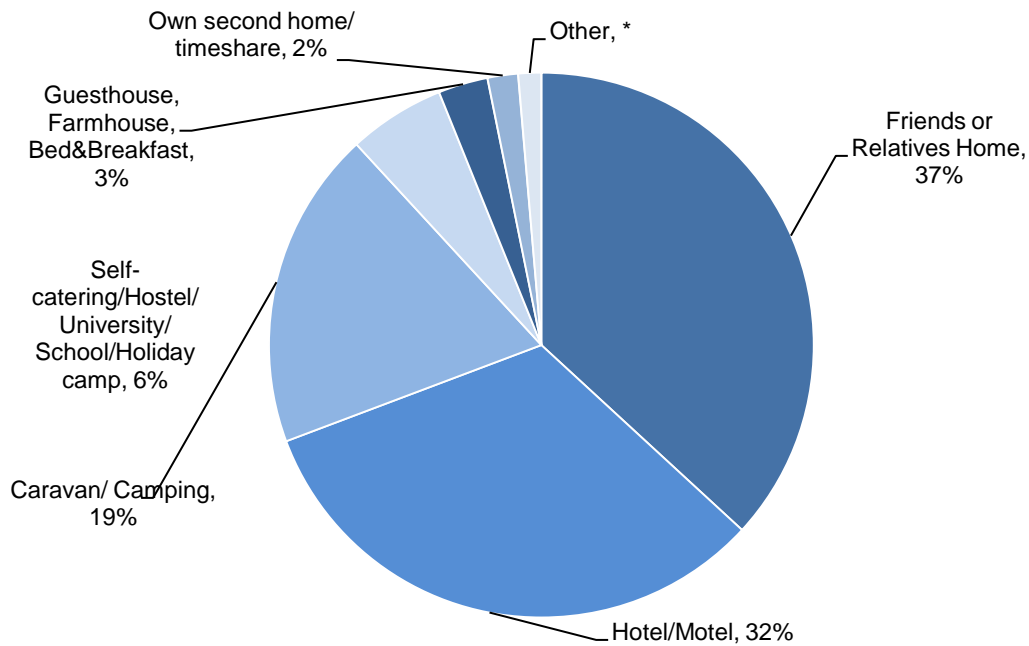


Figure 8: Accommodation used on overnight trips taken by NI residents within NI, 2012.



Thirty-seven percent of NI residents stayed in friend/relative's homes during overnight trips within NI, 32% stayed in hotels and 19% in caravan/camping accommodation in 2012. (Figure 8)

Table 4 shows the accommodation used during the overnight trips taken by NI residents within NI during 2011 and 2012. There was a shift in the total number of overnight trips taken by NI residents using Hotels or Motels for their accommodation (+11% trips and +9% nights), but a fall in total spend during these trips (-9%). There was also an increase in those using self-catering/ hostel/ university/ school/ holiday camps (+58% trips and +85% nights) which again coincides with a fall in the total spend in these accommodation types (-23%). In contrast, there was a fall of 21% in trips taken in caravans/camping and a fall of 47% in nights taken in the same accommodation but an increase in spend during these trips (+57%).

Table 4: Accommodation used on overnight trips taken by NI residents within NI⁽¹⁾⁽²⁾⁽³⁾⁽⁴⁾ 2011, 2012

	Total Trips (000s)			Total Nights (000s)			Total Spend (£m)		
	2011	2012	Change over year (%)	2011	2012	Change over year (%)	2011	2012	Change over year (%) ¹
Hotel/Motel	577	643	+11	894	971	+9	105	96	-9
Guesthouse, Farmhouse, Bed&Breakfast	90	58	-36	138	151	+10	10	12	+23
Self-catering/ Hostel/ University/ School/ Holiday Camp	72	114	+58	193	357	+85	15	11	-23
Friends or Relatives Home	704	729	+4	1,383	1,240	-10	26	39	+49
Own Second Home/timeshare	78	36	-54	188	66	-65	1	6	+454
Caravan/Camping	474	374	-21	1,821	966	-47	19	30	+57
Other	34	27	-20	66	105	+58	1	1	+11
Total	2,029	1,981	-2	4,683	3,856	-18	177	195	+10

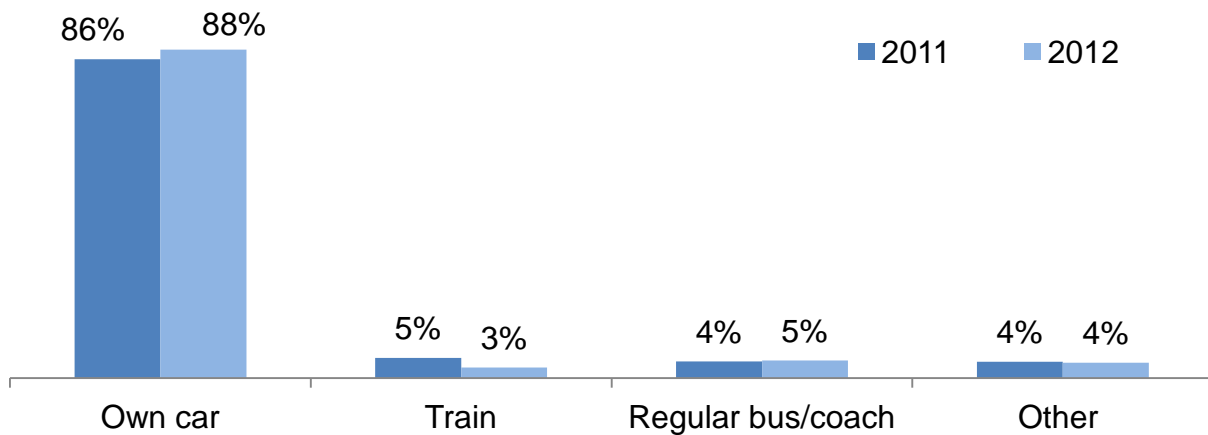
Notes:

- 1) Percentage change calculated using unrounded figures
- 2) Estimates based on a sample size of 30 or less appear shaded as
- 3) Estimates based on a sample size of 31-50 appear shaded as

Type of transport used on overnight trips taken by NI residents within NI 2011-2012

During 2012, 88% of NI residents on overnight trips in NI used their own car to travel to their destination (a slight increase from 2011) and 5% used a regular bus/coach. The main difference between the two years was the drop (from 5% to 3%) in numbers travelling by train.

Figure 9: Type of transport used on overnight trips taken by NI residents within NI 2011-2012



Overnight Holiday Trips within Northern Ireland

While there was an overall decrease of 15% in overnight holiday trips taken by NI residents, the majority of this decrease was experienced for short trips (1-3 nights) which was down 17%, whereas there was little change in trips for 4+ nights (down 1%) (Table 5). However, the average length of stay of these trips fell from 8.4 to 5.7 nights.

Table 5: Estimated overnight holiday trips taken by NI residents within NI by duration of trip, 2011-2012

	1-3 nights			4+ nights			Total		
	2011	2012	Change over year (%) ¹	2011	2012	Change over year (%) ¹	2011	2012	Change over year (%) ¹
Total Trips (000s)	1,077	893	-17	169	167	-1	1,246	1,060	-15
Total Nights (000s)	1,817	1,448	-20	1,429	951	-33	3,246	2,399	-26
Total spend (£m)	104	103	-2	16	31	+95	120	134	+11
Average length of stay (nights)	1.7	1.6	-4	8.4	5.7	-33	2.6	2.3	-13
Average spend per trip (£)	97	115	+19	94	186	+98	97	126	+31
Average spend per night (£)	57	71	+23	11	33	+194	37	56	+50

¹ please note differences between years are calculated on unrounded figures

The main reasons given by NI residents for taking holiday/pleasure/leisure trips within NI in 2012 were to spend time with family/loved ones (44%) and to relax and get away (28%). (Table 6)

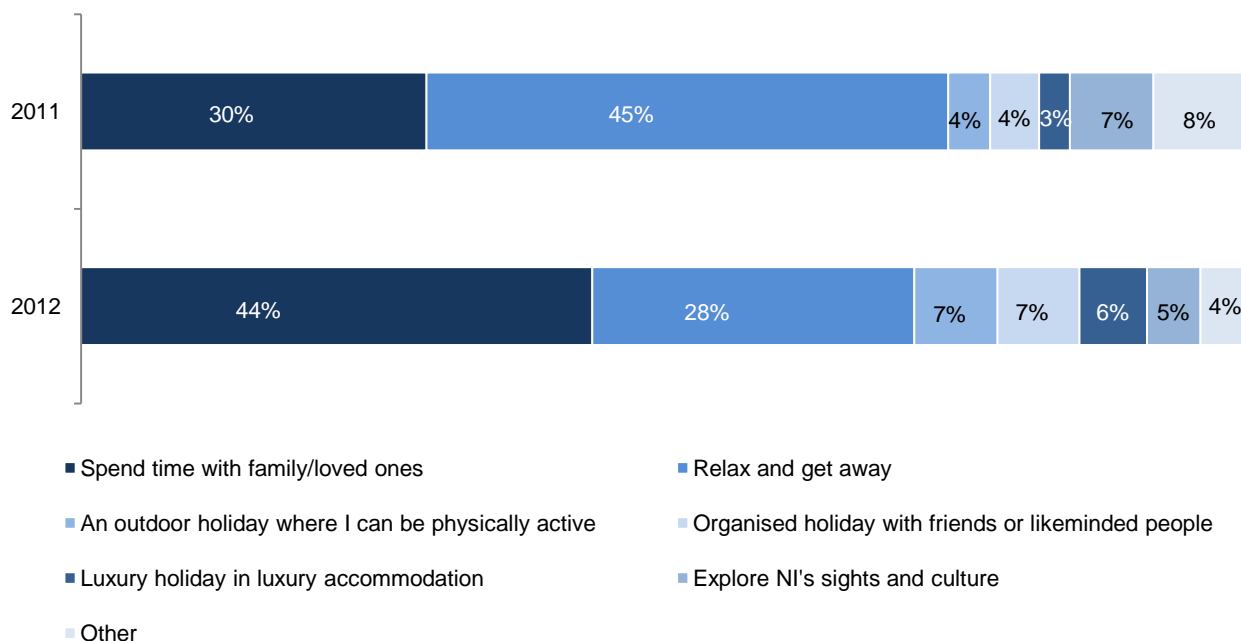
Table 6: Main reason for overnight holiday in NI 2012

	Percentage
Spend time with family/loved ones	44
Relax and get away	28
An outdoor holiday where I can be physically active	7
Organised holiday with friends or likeminded people	7
Luxury holiday in a luxury accommodation	6
Explore NI's sights and culture	5
Other	4

Note: Estimates based on a sample size of 30 or less appear shaded as

The ordering of the top two top reasons for taking holiday/pleasure/leisure trips (to spend time with family/loved ones and to relax and get away) was reversed between 2011 – 2012 (Figure 10)

Figure 10: Reasons for NI residents taking holiday/pleasure/leisure trips within NI 2011-2012



Day trips

During 2012, NI residents took an estimated 8.4 million leisure day trips within NI, spending an estimated £151 million (Table 7). The average spend per leisure day trip within NI was £18.

During the same period, NI residents took an estimated 0.2 million leisure day trips to the RoI, spending an estimated £6 million. The average spend per leisure day trip to the RoI was £24 (Table 7)

Table 7 Estimated leisure day trips taken by NI residents within NI 2011-2012

	2011		2012		Change over year (%) ¹	
	NI	RoI	NI	RoI	NI	RoI
Total leisure day trips (million)	7.2	0.3	8.4	0.2	+17	-19
Total leisure day trip spend (£m)	151	8	151	6	+1	-24
Average spend per leisure day trip (£)	21	26	18	24	-14	-6

Notes ¹ Percentage change calculated using unrounded figures

Of the 8.4 million leisure trips, 2.4 million were tourism day trips, which accounted for £66 million of the total day trip expenditure (Table 8). The average spend per tourism day trip within NI was £28. This showed a decrease in the number of tourism day trips since 2011 (-7%), but an increase of 6% in the total spend.

Of the 0.2 million leisure trips to the RoI during 2012, 0.1 million were tourism day trips, which accounted for £5 million of the total day trip expenditure within RoI. The average spend per tourism day trip to the RoI was £36 (Table 8).

Table 8 Estimated tourism day trips taken by NI residents within NI 2011

	2011		2012		Change over year (%) ¹	
	NI	RoI	NI	RoI	NI	RoI
Total tourism day trips (million)	2.5	0.2	2.4	0.1	-7	-25
Total tourism day trip spend (£m)	63	5	66	5	+6	+5
Average spend per tourism day trip (£)	25	26	28	36	+14	+41

Notes ¹ Percentage change calculated using unrounded figures

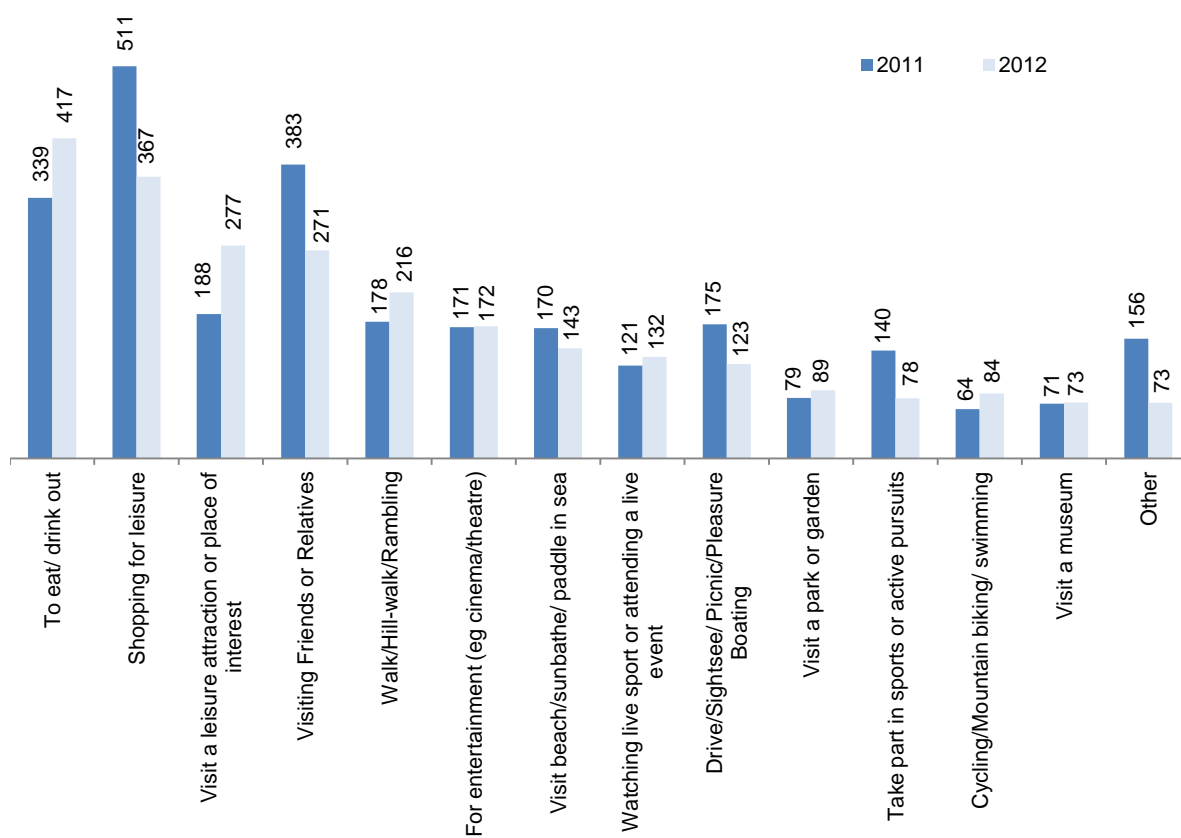
During 2012, 17% of NI residents taking day trips within NI had gone out to eat/ drink and 15% were shopping for leisure (Table 9). The same 5 activities were top in both 2011 and 2012 (albeit in a different order).

Table 9 Top 5 activities reported for tourism day trips 2011

	2011		2012	
	%	Rank	%	Rank
To eat/drink out	12	3	17	1
Shopping for leisure	19	1	15	2
Visiting visitor attraction or place of interest	7	4	11	3
Visiting Friends/Relatives	14	2	11	4
Walk, hill-walk, rambling	6	5	9	5

Figure 11 shows activities reported for tourism day trips in 2011 and 2012.

Figure 11: Tourism Day Trips (thousands) by activity reported 2011-2012



There was a fall in the proportion of tourism day trippers within NI travelling by car (from 86% in 2011 to 76% in 2012). One in ten (10%) of day trippers used a bus/coach to get to their destination and 5% a train. (Table 10)

Table 10 Transport used on tourism day trips in NI 2011-2012

	2011		2012	
	%	Rank	%	Rank
Car (own/friend's/firm's)	86	1	76	1
Regular bus/coach	6	2	10	2
Train	3	3	5	3
Other	5		9	
Total	100		100	

Definitions/Data sources of Domestic Tourism Statistics in Northern Ireland

An **overnight trip** includes any trip away from home for at least one night in the UK or Republic of Ireland.

Great Britain includes England, Scotland and Wales. For the purpose of this chapter, trips to the Channel Islands and the Isle of Man have been grouped with Great Britain due to the small number of trips to the Channel Islands and Isle of Man.

A **leisure day trip** is an outing or trip, not for business, made on the same day from home with no time or distance restriction.

A **tourism day trip** is a leisure day trip taken outside the respondent's usual environment where they are away from home for more than 3 hours.

Trip expenditure

Trip expenditure is the total spent on package travel, accommodation, travel costs, services, food & drink, entertainment and other shopping during or for use on the trip.

Source

The information presented in this chapter was collected through the Continuous Household Survey. Further information on the survey methodology is available from www.csu.nisra.gov.uk

Data revisions

Tourism estimates are produced to provide timely data to the tourism industry and Government policy makers. 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 chapter are the most up-to-date available at the time of publication.

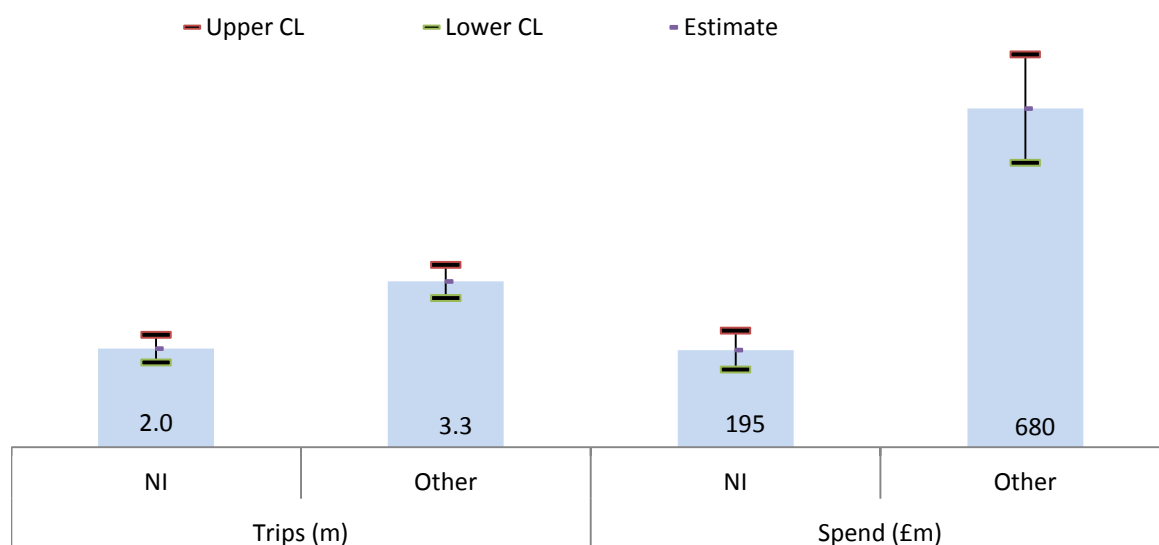
Sampling Variability

The Continuous Household Survey is a sample survey and estimates obtained from it are subject to sampling variability. Table 5.12 details the confidence intervals for the estimates within NI and other countries

Table 12: Confidence intervals for trip estimates, January-December 2012

Country	95% Confidence Interval	
	Trips	Expenditure
Northern Ireland	+/-14	+/-20
Other	+/-10	+/-16

Figure 12 Confidence Intervals for Trip estimates, January – December 2012



Rounding

Figures in the tables have been rounded to the nearest thousand or million and may not add to the figure shown as the total. Year on year percentage change is based on unrounded figures.

Methodology

Data on overnight and day trips taken by NI residents are collected through the Continuous Household Survey. Further information on the survey methodology is available from the Northern Ireland Statistics & Research Agency, Central Survey Unit. Further information on the survey methodology is available from www.csu.nisra.gov.uk

Weighting and grossing

In order to estimate the value and volume of overnight and day trips taken by NI residents, it is necessary to gross the findings from the survey to the NI population.

The respondent data is weighted to the NI population by age group and sex on a monthly basis. This is carried out especially for the tourism estimates as the host Continuous Household Survey is not weighted. The monthly weighting means that the weights sum across the sex by age group categories to the adult population of NI for each month.

The age groups used are 16-24, 25-34, 35-44, 45-54, 55-64, 65-74 and 75+. Due to small cell sizes within the youngest age groups, the males and females are merged

to form one weighting cell in the 16-24 age group, resulting in 13 weighting cells each month.

Respondents are asked to report any overnight trip from which they have returned in the last four weeks. As the data are weighted to monthly population totals, this will bias down the total number of trips taken. To compensate for this, the individual trip counts are multiplied by a factor of $365/(12*4*7) = 1.08$

Dealing with missing expenditure

Total expenditure is requested from all respondents and for those taking trips in NI, the expenditure is collected within categories e.g. accommodation, travel, food & drink. In cases where expenditure is missing, coded 0 when there should be a cost (e.g. stayed in commercial accommodation) or unknown, a mean value is calculated and applied to the missing cases. Where available, a mean value is calculated within expenditure categories. The mean is calculated within the following strata: month of trip and destination country.

Analysing and reporting expenditure

Total expenditure is collected for the respondent's travelling party (trip expenditure). For analysis, expenditure per adult within the travelling party is used, except in the cases of large parties of children e.g. school trips, where expenditure per person is used. In the 2010/11 survey year, the number of children on day trips was not recorded. The expenditure for January-March 2011 trips which was collected through the 2010/11 survey is therefore expenditure per person.

Precision of estimates

The Continuous Household Survey is a multi-stage sample where all members of a household over the age of 16 are interviewed and estimates obtained from it are subject to sampling variability. The standard error and 95% confidence intervals for the estimates of trips within NI and other countries are presented in each statistical bulletin.

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