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Coverage: New Local Government District

This report provides 2013 tourism statistics for the 11 new Local Government Districts (LGD). A number of statistics, overnight trips, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits are included.

Key Findings

- The largest number of overnight trips in 2013 was to **Belfast** LGD (1.1 million). Around one in four overnight trips to Northern Ireland was to this area (27% of all overnight trips).
- Last year **Causeway Coast & Glens** LGD accounted for 0.7 million overnight trips. This area is the most popular in Northern Ireland on a per capita basis, with 5.0 overnight trips per head of local population. In contrast, **Belfast** LGD (second most popular) had 3.4 overnight trips per head of population.
- Reason for visit varies by area. In three LGDs half or more overnight trips were for holiday purposes; **Causeway Coast & Glens** (58%), **Newry, Mourne & Down** (55%) and **Fermanagh & Omagh** (50%).
- The impact of Derry~Londonderry UK City of Culture 2013 can also be seen. Overnight trips to **Derry & Strabane** LGD increased by 50% between 2012 and 2013 to stand at 0.25 million trips in 2013. Associated expenditure increased by 75% (to £47million in 2013).
- **Belfast** LGD has the largest number of beds in hotel accommodation (7,100 beds or 40% of NI total) with over half of these beds occupied throughout last year (54%).
- The importance of self-catering accommodation in **Causeway Coast & Glens** and **Fermanagh & Omagh** LGDs is clear. There are 7,000 self-catering beds in these two LGDs out of 12,000 self-catering beds in Northern Ireland as a whole.
- Last year, the most popular visitor attractions included **Giant's Causeway** (0.75 million visits), **Titanic Belfast** (0.6 million), the **Ulster Museum Belfast** (0.4 million) and **Derry's Walls** (0.4 million).

Introduction

This report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in Local Government Districts (LGD).

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 3).

The report includes five sections:

- 1a. Overnight trips by Local Government District (2013)
- 1b. Expenditure on overnight trips by LGD (2013)
- 1c. Reason for Visit by LGD (2011-2013)
2. Commercial Accommodation by LGD (2013)
3. Visitor Attractions (2013)
4. Employment in Tourism Related Industry by LGD (2013)
5. Cruise Ship visits by Harbour (2011-2013).

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 overnights of visitors to Northern Ireland it also includes overnights of local residents within Northern Ireland. Note overnights 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 1a: Overnight trips by LGD (2013)

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 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

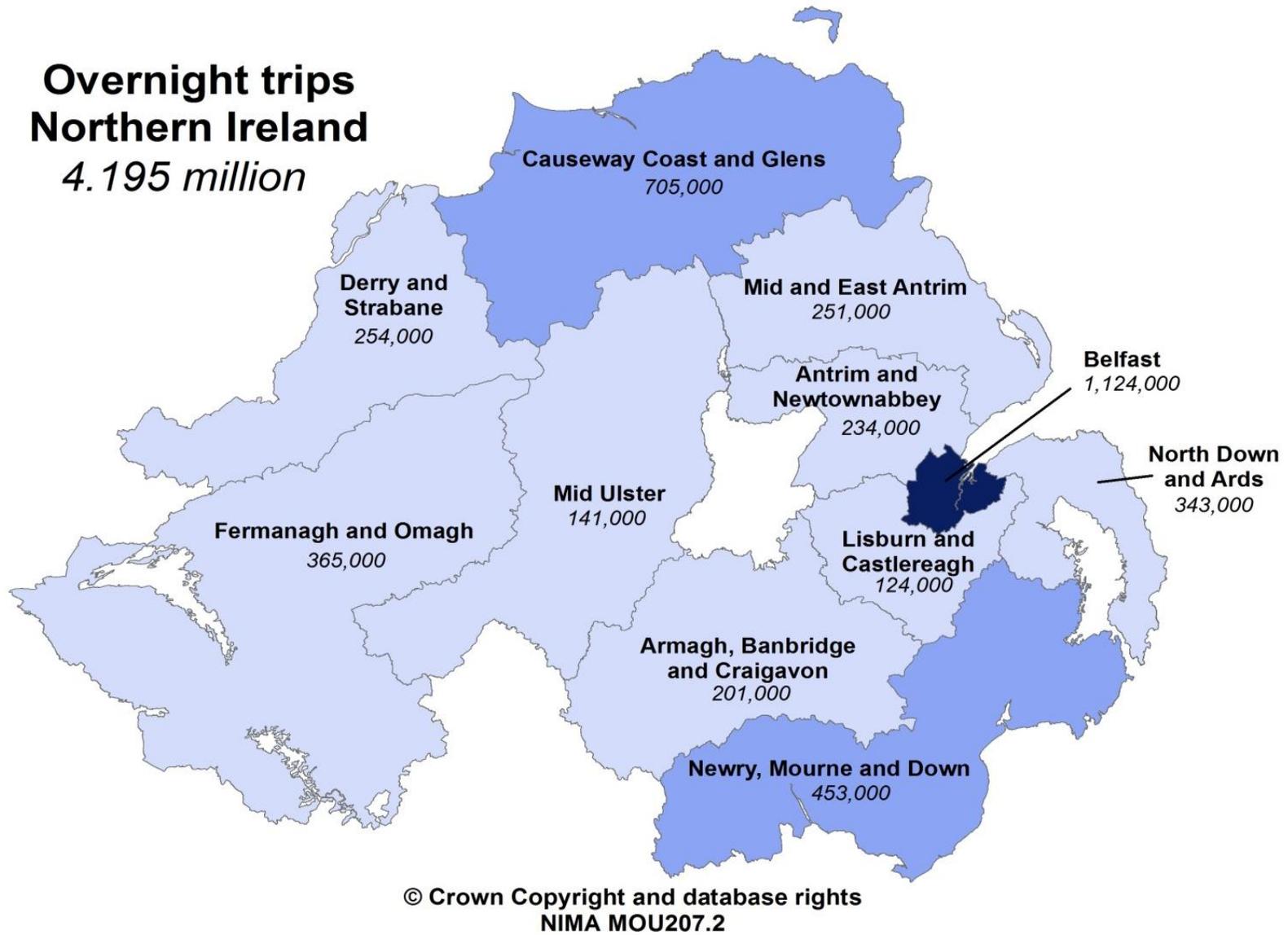
- Figure 1a shows the overnight trips taken in each Local Government District and Figure 1b shows the same information by thematic map.

Figure 1a: Overnight Trips by Local Government District, 2013



See [link](#) for data

Figure 1b: Map of 2013 overnight trips by Local Government District

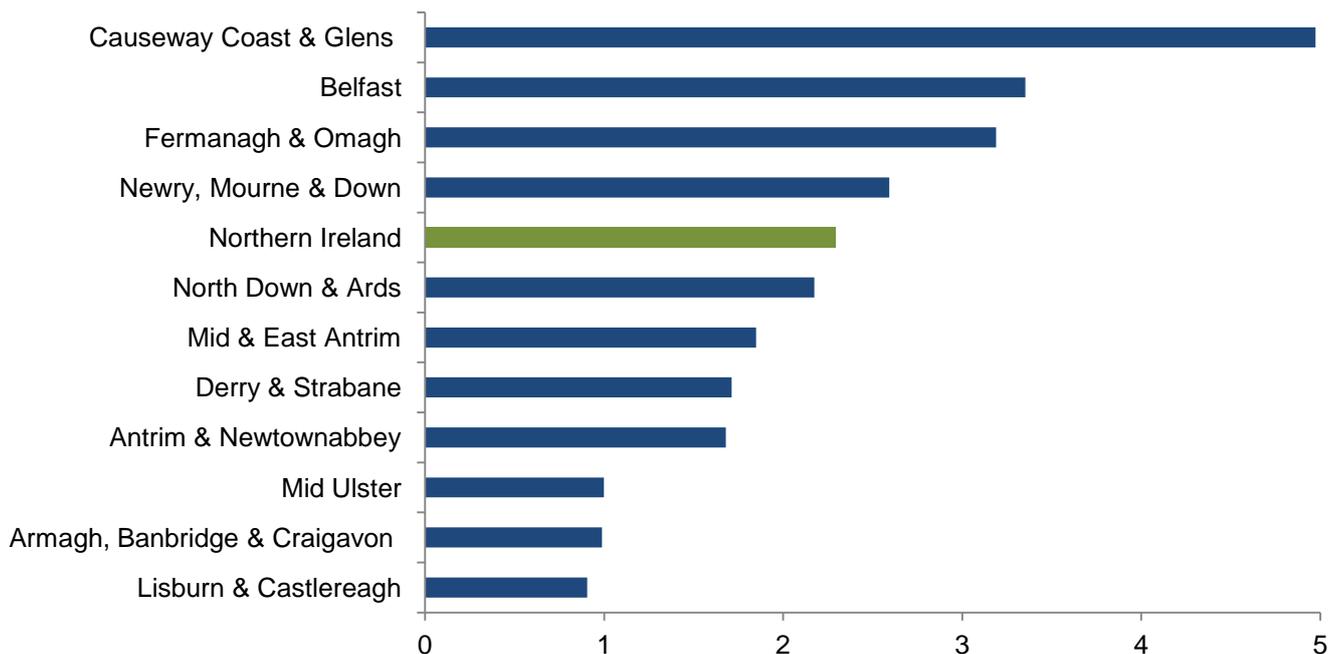


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Overnight Trips

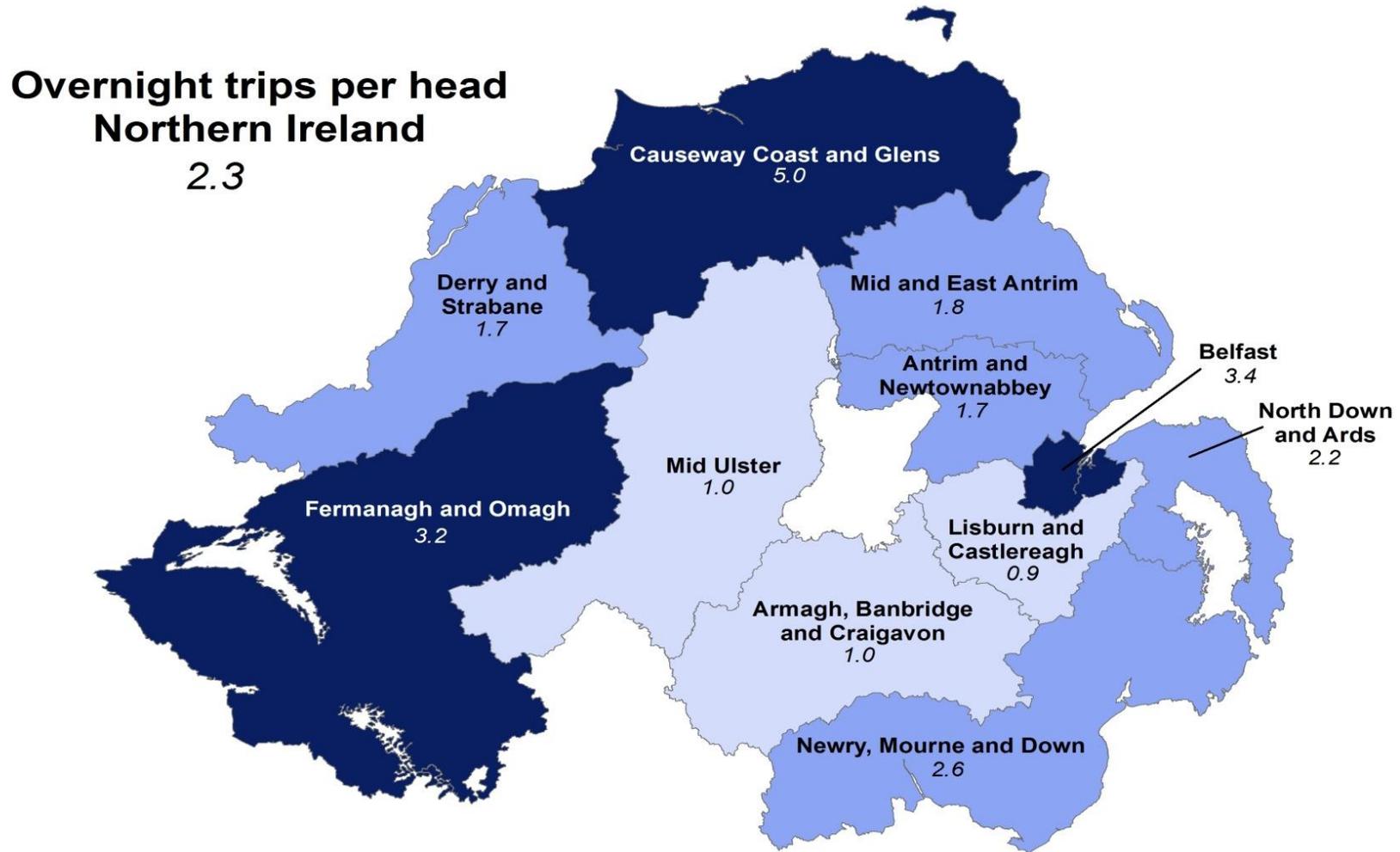
- Belfast experienced the highest number of overnight trips of any Local Government District during 2013, (1.1 million overnight trips or 27% of all overnight trips).
- The largest increase in overnight trips was observed in Derry & Strabane LGD from 164,000 overnight trips in 2012 to 254,000 overnight trips in 2013 (+53%). This increase may be due to the Derry~Londonderry UK City of Culture year-long festival in 2013.
- Whilst other short-term events which took place in 2013, e.g. G8 summit and World Police & Fire Games, these surveys cannot be used to assess the impact of these short-term events.
- Areas can be attractive due to natural features, tourism attractions and also opportunity for people to visit family or friends. Therefore, amongst other things the population size of the area impacts on the number of overnight trips. To allow for this, the number of overnight trips can be compared to the local population to give the number of trips per head of population. This is shown in Figure 2a and in thematic map form in Figure 2b.

Figure 2a: Overnight Trips per head of local population (2013)



See [link](#) for data

Figure 2b: Map of 2013 overnight trips per head of population by Local Government District



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See [link](#) for data

Overnight Trips

- The Causeway Coast and Glens showed the highest number of overnight trips per head of the population, with 5.0 visits per head of local population. Belfast; Newry, Mourne & Down and Fermanagh & Omagh all had around 3 visits per head of the population (Figure 2a). In contrast, Lisburn & Castlereagh, Armagh, Banbridge & Craigavon and Mid Ulster had around 1 visit per head of local population.
- This highlights the importance of tourism in the Causeway Coast & Glens area. Excluding this local area, there is a three-fold variation across Local Government Districts in the per capita level of overnight visits. This points to the different impact that tourism can make to local economies.

Section 1b: Expenditure on overnight trips by LGD (2013)**Expenditure associated with Overnight Trips**

- Figure 3a shows the expenditure associated with overnight trips taken in each Local Government District (2013). This data is also shown in map form in Figure 3b.
- As would be expected, this picture broadly follows the number of overnight trips. In total £722 million was spent on overnight trips across Northern Ireland, with £227 million or around 31% spent in Belfast LGD. A further £110 million was spent in Causeway Coast & Glens and £86 million in Fermanagh & Omagh. All other Local Government Districts were at £50 million or less.

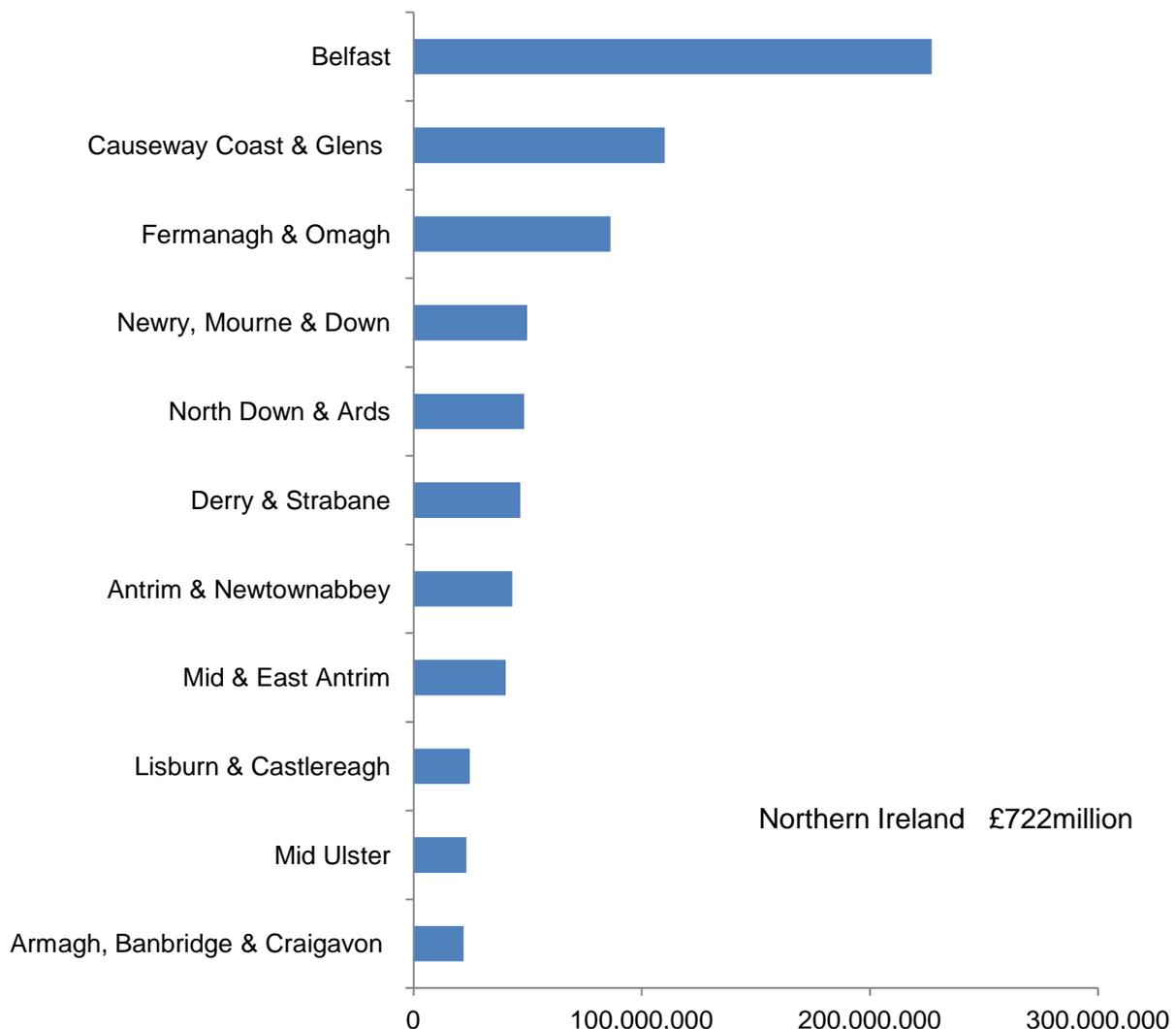
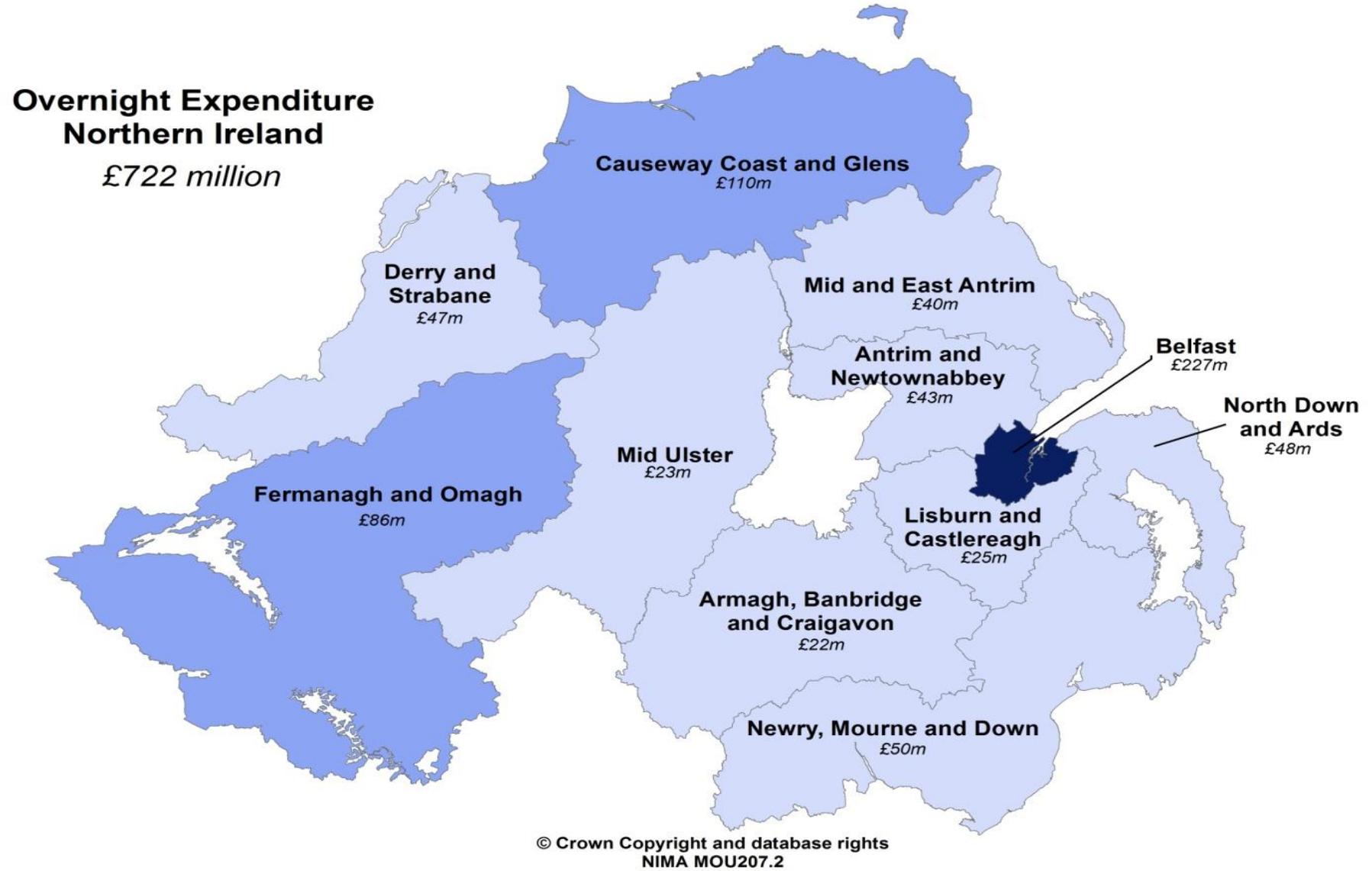
Figure 3a: Expenditure (£) on Overnight Trips by Local Government District, 2013

Figure 3b: Map of expenditure on Overnight Trips by Local Government District, 2013



See [link](#) for data

Section 1c: Reason for Visit by LGD (2011-2013)

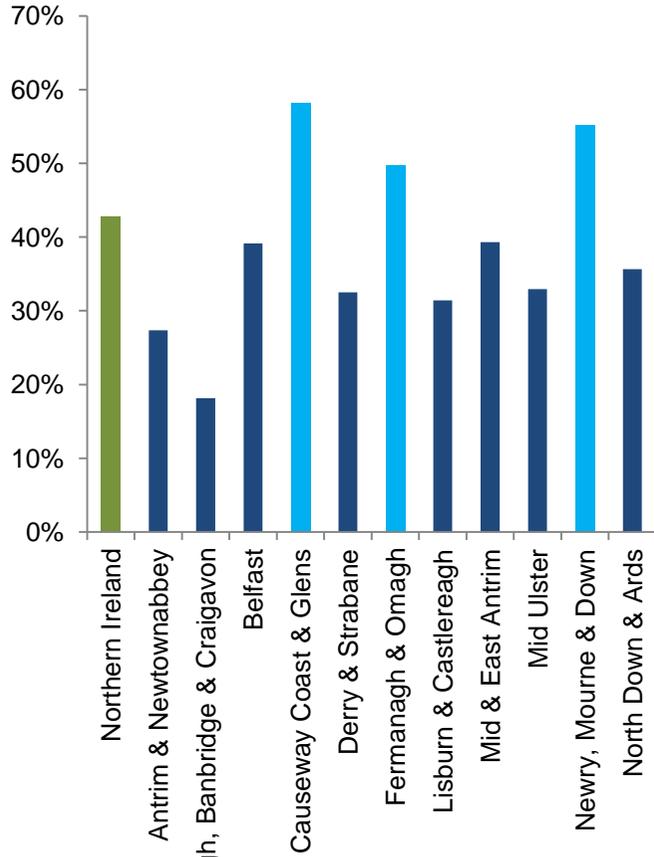
Reason for Overnight Trip

- Survey respondents are also asked the reason they stayed overnight in Northern Ireland. The results for all overnight trips regardless of place of origin¹ are shown in Figures 4a-c.
- In overall terms the three graphs show the relative importance of each sector. Overnight trips for holiday purposes makes up 43% of the Northern Ireland market, visiting friends and relatives 41% and business trips 10%. However, this masks significant local variation.
- Figure 4a shows the proportion of overnight trips in each local area that were taken for holiday/pleasure/leisure reasons. It shows that half or more of the overnight trips taken in Causeway Coast & Glens (58%), Newry, Mourne & Down (55%) and Fermanagh & Omagh (50%) were for holiday purposes. This shows the relative importance of holiday tourism in these areas.
- In contrast, Figure 4c shows that the two main cities, Belfast and Londonderry, have a significant pull for business trips. In Belfast 17% overnight trips are for business reasons, while it is 16% in Derry & Strabane. Indeed, of all those people taking an overnight business trip in Northern Ireland, around half (46%) stay in Belfast LGD.

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

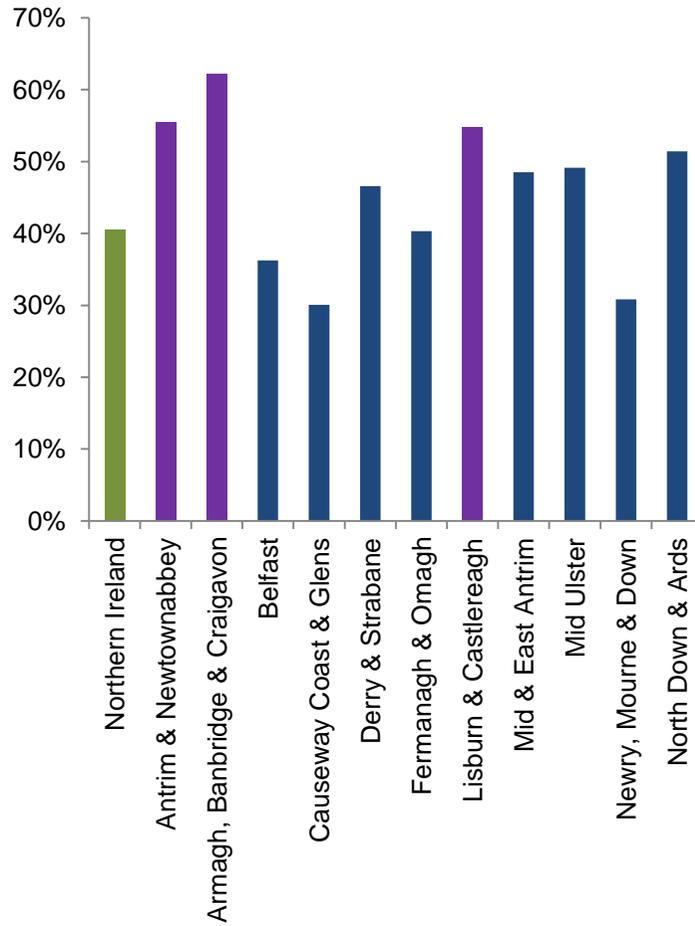
Figures 4a-c: Reason for Overnight Trip in Northern Ireland within Local Government District (3 year rolling average)

4a. Holiday/Pleasure/Leisure



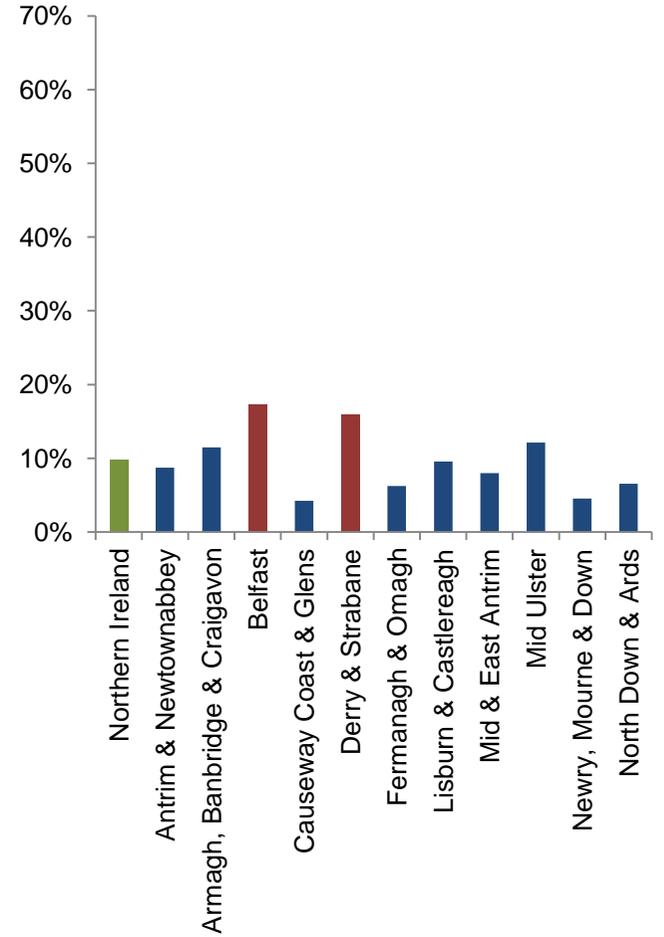
Causeway Coast & Glens,
Newry, Mourne & Down,
Fermanagh & Omagh

4b. Visiting Friends/Relatives



Armagh, Banbridge & Craigavon,
Antrim & Newtownabbey,
Lisburn & Castlereagh

4c. Business

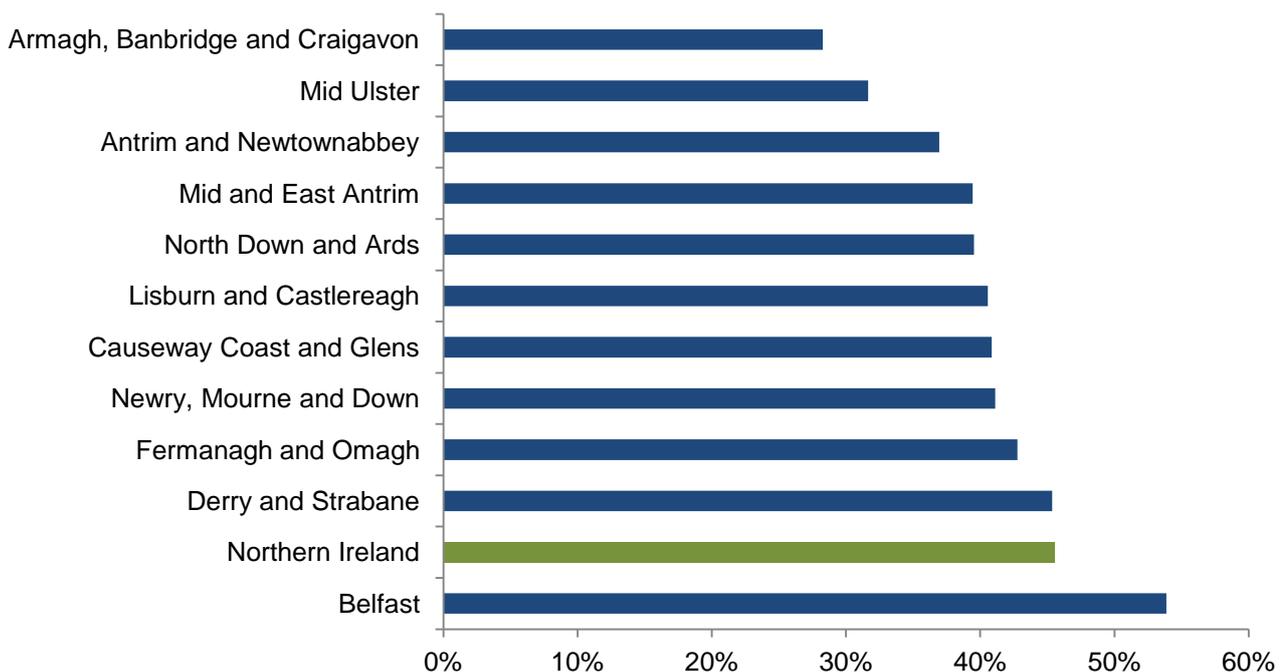


Belfast,
Derry & Strabane

Section 2: Commercial Accommodation by LGD (2013)

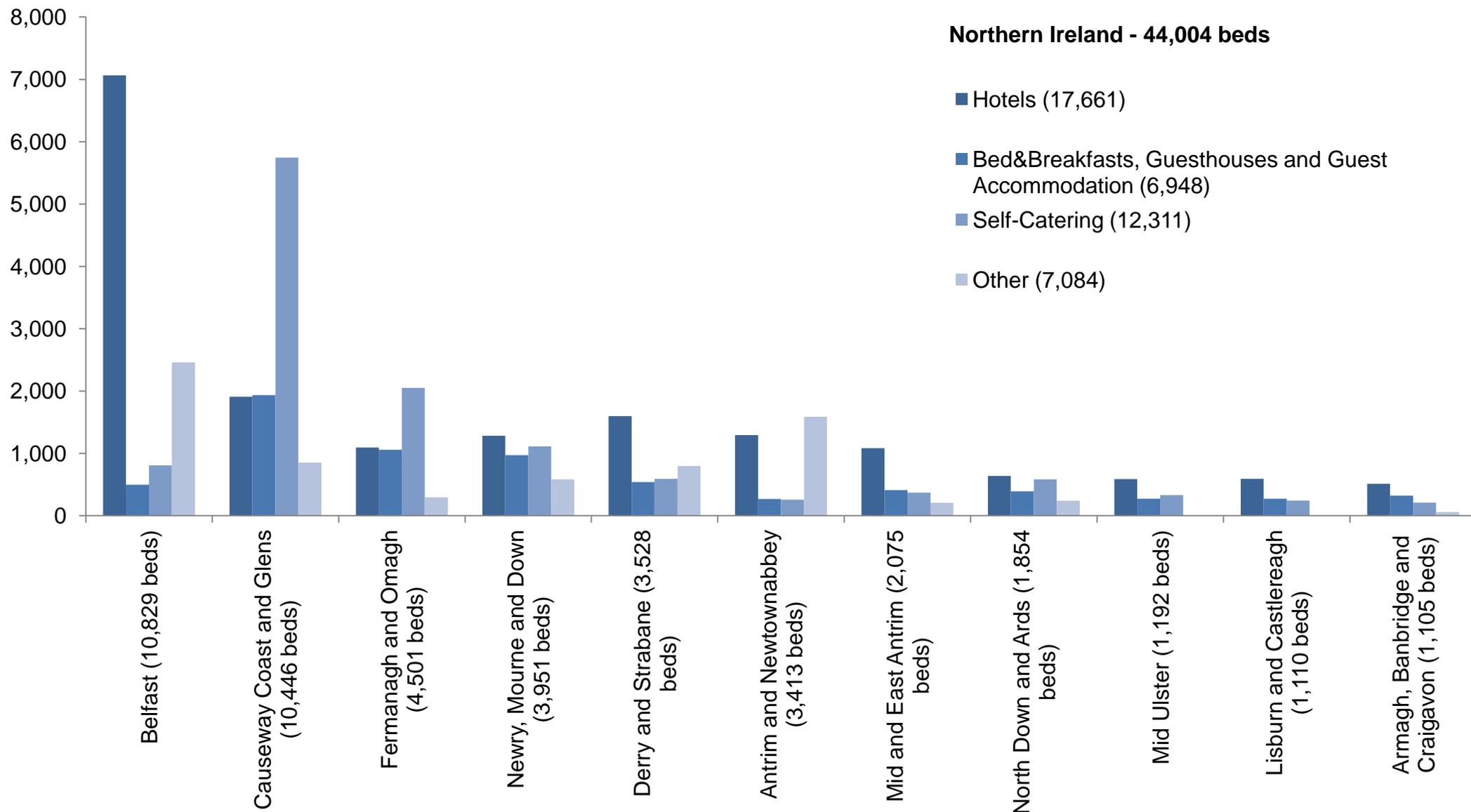
- The availability of commercial accommodation is an indicator of the supply side of tourism. Figure 5a (overleaf) shows the volume of beds in commercial accommodation by Local Government District in 2013.
- Around half of all licensed accommodation in Northern Ireland is in two LGDs - Belfast (25%) and Causeway Coast and Glens (24%). However, the makeup of the establishments within these areas differ, with Belfast having the largest number of hotel beds (7,100 beds or 40% of the Northern Ireland picture).
- In contrast, the importance of self-catering accommodation in Causeway Coast & Glens and Fermanagh & Omagh LGDs is also clear. There are 7,000 self-catering beds in these two areas out of 12,000 self-catering beds in NI.
- NISRA run occupancy surveys of local commercial accommodation. Figure 5b shows bed-space occupancy by LGD in 2013; the Figure points to Belfast having significantly higher hotel bed-space occupancy levels than other areas.

Figure 5b Bed-space occupancy of Hotels by Local Government District, 2013



See [link](#) for data

Figure 5a: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2013



See [link](#) for data

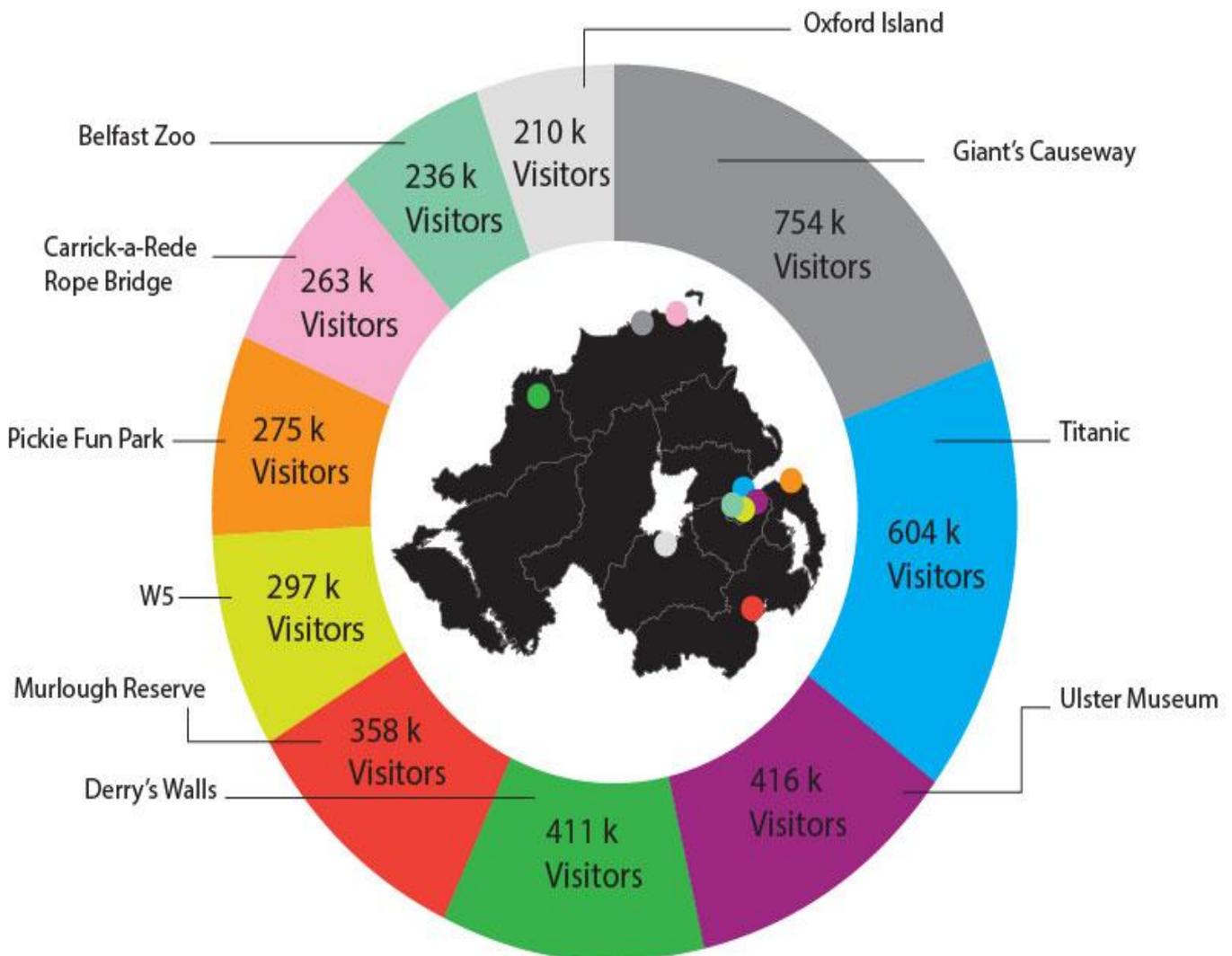
Section 3: Visitor Attractions (2013)

Visitor Attraction Survey

- Visitor Attractions across Northern Ireland provide information to NISRA 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.
- Last year, the most popular visitor attractions included **Giant’s Causeway** (0.75 million visits), **Titanic Belfast** (0.6 million), the **Ulster Museum Belfast** (0.4 million) and **Derry’s Walls** (0.4 million). This is shown in graphical form in Figure 6a.

Figure 6a: Top 10 Visitor Attractions*, 2013

*excludes country parks/parks/forests/gardens



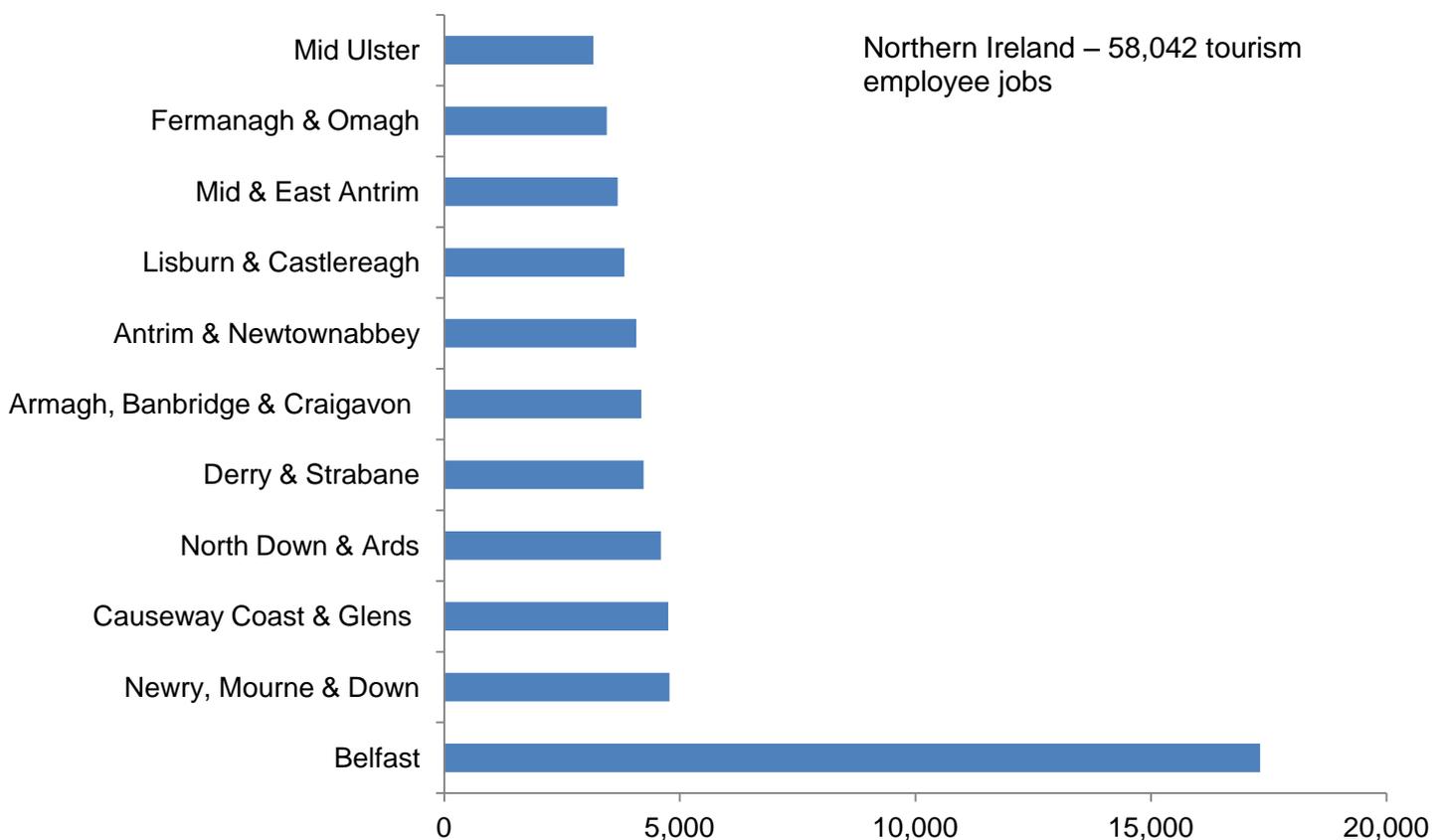
See [link](#) for data

Section 4: Employment in Tourism Related Industry by LGD

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 7a gives an indication on the number of employee jobs in tourism characteristic industries in each local area. In total, in 2013 there were just under 700,000 employee jobs in Northern Ireland, of which 58,000 or 8% 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, North Down and Ards and Causeway Coast & Glens LGDs both have over 12% of local employment in this industry.

Figure 7a: Employee Jobs in Tourism Characteristic Industries in Local Government Districts 2013

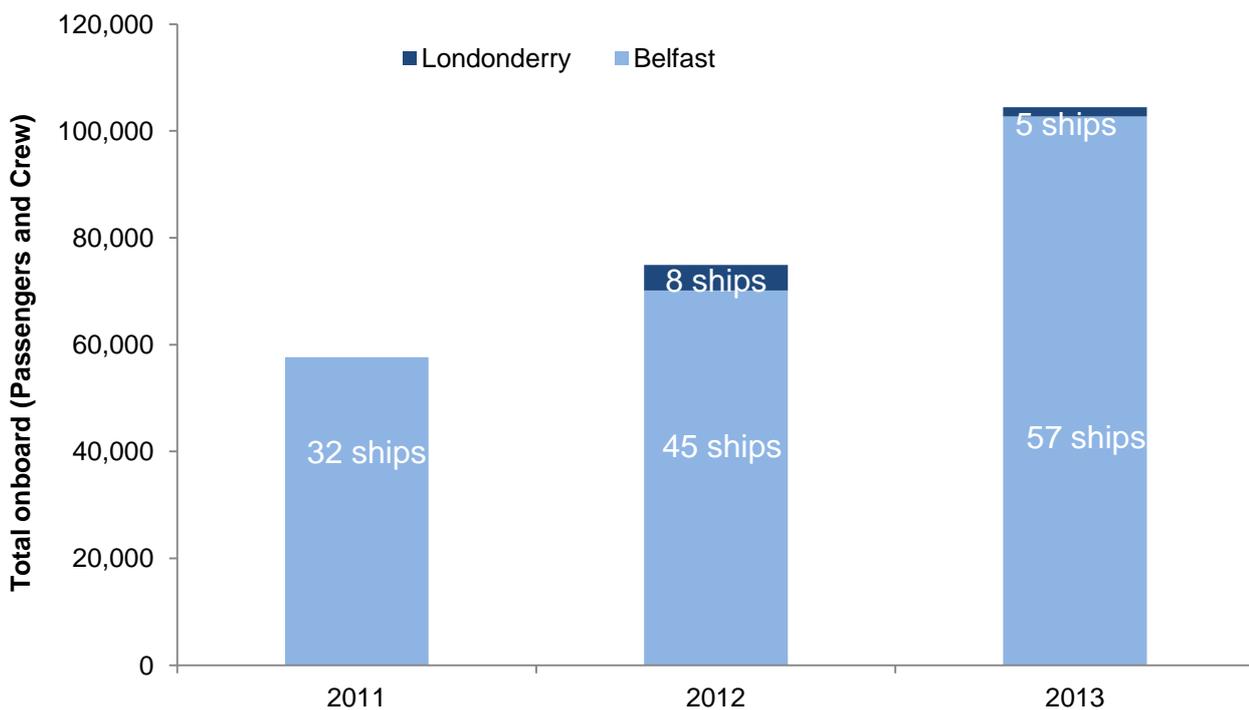


See [link](#) for data

Cruise Ships

- Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 8a shows the trend in the number of cruise ships docking at local ports – see background note 12.
- The figures point to a significant increase in numbers of people visiting Northern Ireland from cruise ships, up from 58,000 in 2011 to 104,000 in 2013. Although the cruise ships dock in Belfast/Londonderry, research shows that a number of passengers will go on bus trips to other areas (for example the Giants Causeway).

Figure 8a: Total cruise ship numbers and passengers onboard docking at NI ports (2011-2013)



See [link](#) for data

- Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (e.g. Bangor & Portrush) – statistics from these visits are not included in this report due to data availability issues.

Background Notes

1. This report presents a summary of 2013 tourism statistics by Local Government Districts (LGD). Tourism data is derived from a variety of sources, more information on these sources can be found at this [link](#). Information on the data quality, revisions can be accessed at this [link](#).
2. 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
3. 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 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.
4. Tourism statistics 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. 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 this [link](#).
5. Tourism statistics systems are designed to collect information for Northern Ireland as a whole. However, respondents provide the number of trips, nights and spend by location in both the Northern Ireland Passenger and Continuous Household Surveys. This information can be used to disaggregate by Local Government District. When more than one LGD is visited, then the allocation of trips, nights and spend to each LGD is counted at each location, leading to the total number of trips adding to more than previously published totals.
6. NISRA uses the Survey of Overseas Travellers (SOT) run by Fáilte Ireland to gain information on the overnight trips to Northern Ireland who exit through Republic of Ireland ports. In addition NISRA use the Central Statistics Office Ireland Household Travel Survey (HTS) to gather information on Republic of Ireland residents who overnight in Northern Ireland. These two

Background Notes

surveys are apportioned to LGD using the Northern Ireland Passenger Survey for the SOT and the Northern Ireland Continuous Household Survey for the HTS. 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, users should be aware that some information on overnight trips of children who overnight without their parents/guardians will be excluded.
8. 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. 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 this [link](#)
9. This report includes information from the Census of Employment. More information on the Census of Employment can be found at this [link](#). Jobs in tourism industries are based on the groupings of “tourism characteristics activities” as set out in the United Nations publication “International Recommendations for Tourism Statistics 2008” IRTS.
10. These tourism statistics are not designed to measure **short-term** local events, however these may have an impact on results. Some of the events that might impact on local tourism in 2013 were G8 Summit (Enniskillen 2013) and the World Police and Fire Games (province wide 2013).
11. This report only includes day trip statistics that relate to cruise ships. More detailed information on day trips will be published alongside the 2014 tourism statistics report in Spring 2015.
12. Cruise ship data is collected from [Visit Belfast](#) and [Cruise North West](#). Cruise ships 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. Visitor Attractions statistics are based on a list held by the Northern Ireland Tourist Board. The results are based on a self-completion questionnaire. The count of visitors are published as provided by the proprietors of attractions, counting methods vary from estimations to counters to ticket sales and can change over time.
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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