

10 June 2021

# Northern Ireland Tourism Statistics

## Alternative Data Sources

### Introduction

- Due to the coronavirus (COVID-19) pandemic, face to face interviews stopped in the middle of March 2020. This includes surveys in Northern Ireland and the Republic of Ireland. As the NI Tourism Statistics are based on a range of surveys, this has made it difficult to produce the usual quarterly statistics (including quarter 1 2020). NISRA has also experienced problems with accessing some data for occupancy surveys which may be due to COVID closures or the person responsible for the data being furloughed.
- In the absence of NISRA's normal tourism publications, this document includes a range of sources – some which show the impact of COVID-19 directly (for example opinion surveys or surveys on the impact) and some which show time series previously unused in tourism statistics publications and some using the statistics usually produced but in an alternative format.
- Users should note that there may be caveats to some of the sources so please check the notes and if you have any other queries, please contact tourism statistics branch.
- The document includes data which may have other breakdowns available. Please get in touch if you have any questions or would like this document in another format.

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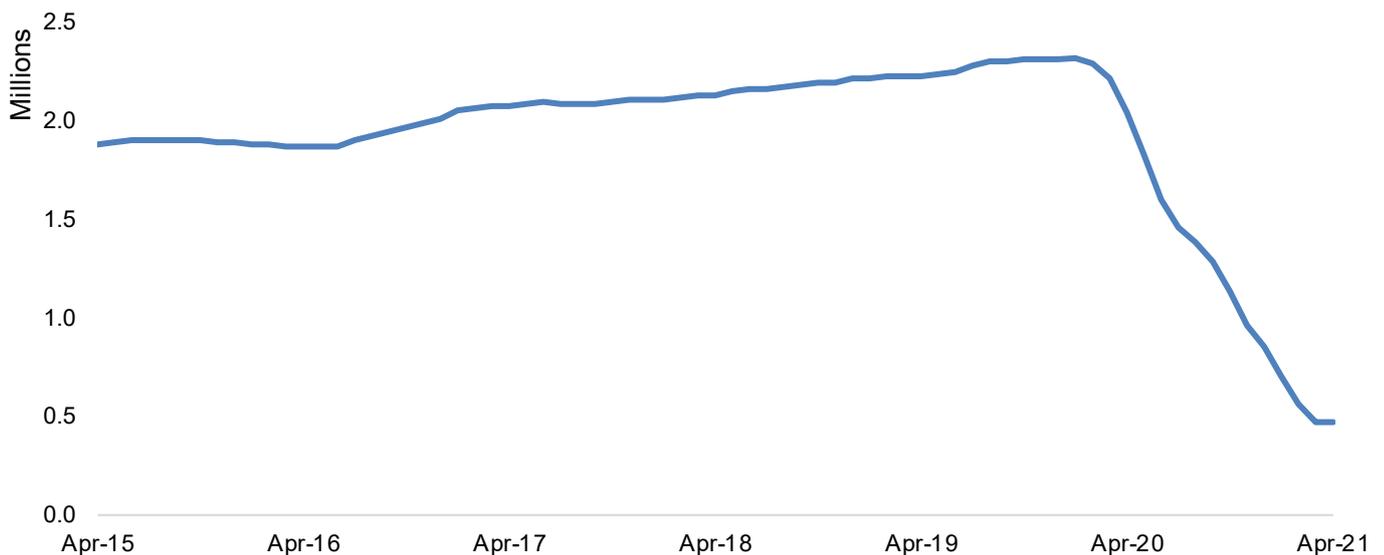
## Section 1: Occupancy Survey

The Occupancy Survey (carried out by NISRA – Tourism Statistics) shows the estimated number of rooms sold. Data is collected monthly and grossed up to the NI accommodation stock. During COVID-19, NISRA has continued to collect data when establishments have been permitted to open – and assumed zero rooms sold when they haven't been permitted due to COVID restrictions. It should be noted that response rates can vary – particularly during COVID as it is unclear if the person responsible may be furloughed. However the source can provide a good indication of how this sector is performing.

### Hotel Rooms Sold

**Figure 1.1: Estimated Hotel Rooms Sold**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <estimated hotel rooms sold>](#)

Source: NISRA Tourism Statistics (Occupancy Survey)

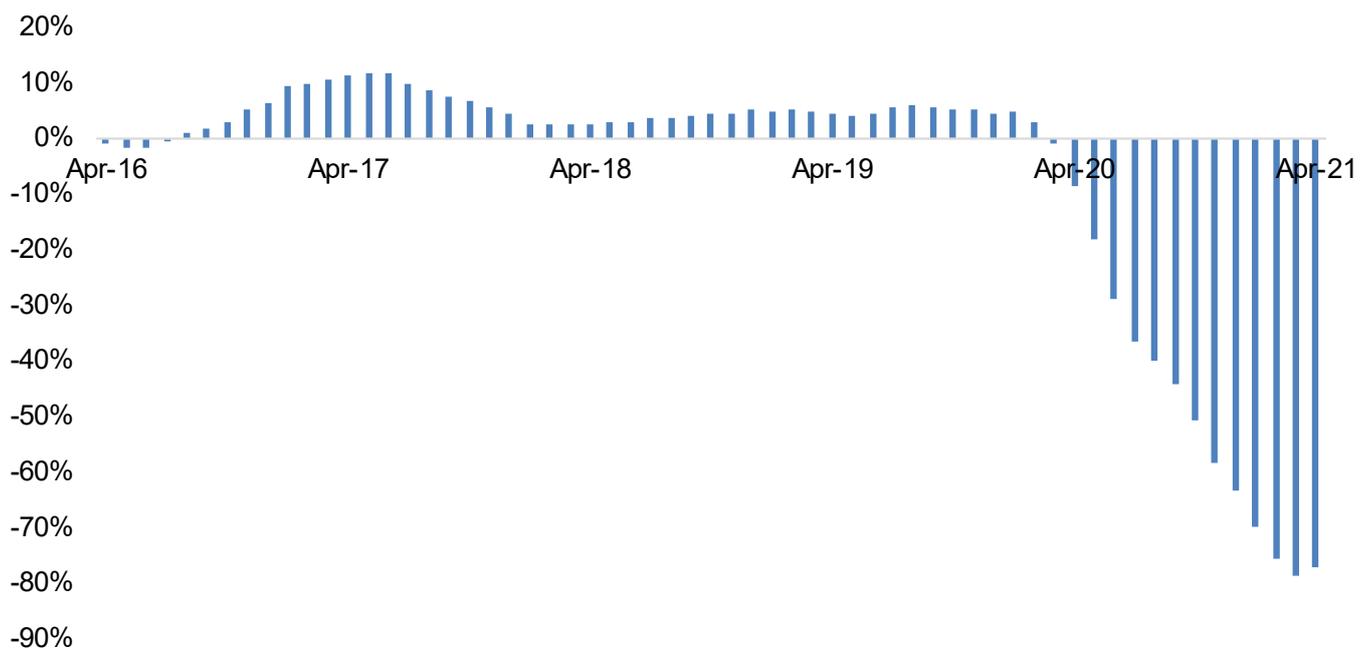
As can be seen in figure 1.1, the number of hotel rooms sold in the 12 months to April 2015 was 1.8 million, and the trend rose to peak in the 12 months to January 2020 (2.3 million). However the impact of COVID-19 was seen from April 2020 when the estimated number of rooms began

to fall – the latest statistics show that in the 12 months to April 2021, 0.5 million rooms were sold – a fall of 77% from the previous year (figure 1.2).

**Figure 1.2: Percentage change year on year in rooms sold in hotels (%)**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)

% change refers to the percentage change year on year)



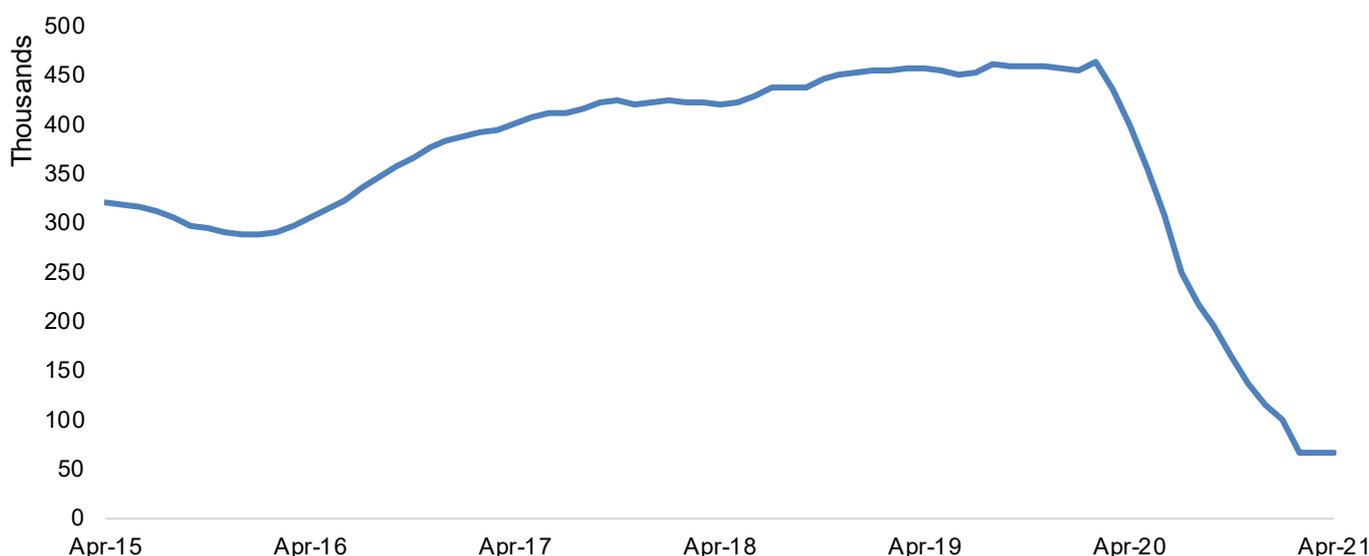
[Download chart data for <estimated hotel rooms sold>](#)

Source: NISRA Tourism Statistics (Occupancy Survey)

## Rooms Sold in Bed & Breakfasts/Guest Accommodation and Guesthouses

**Figure 1.3: Estimated Rooms Sold in Bed&Breakfasts/Guest Accommodation and Guesthouses**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <estimated rooms sold in other establishments>](#)

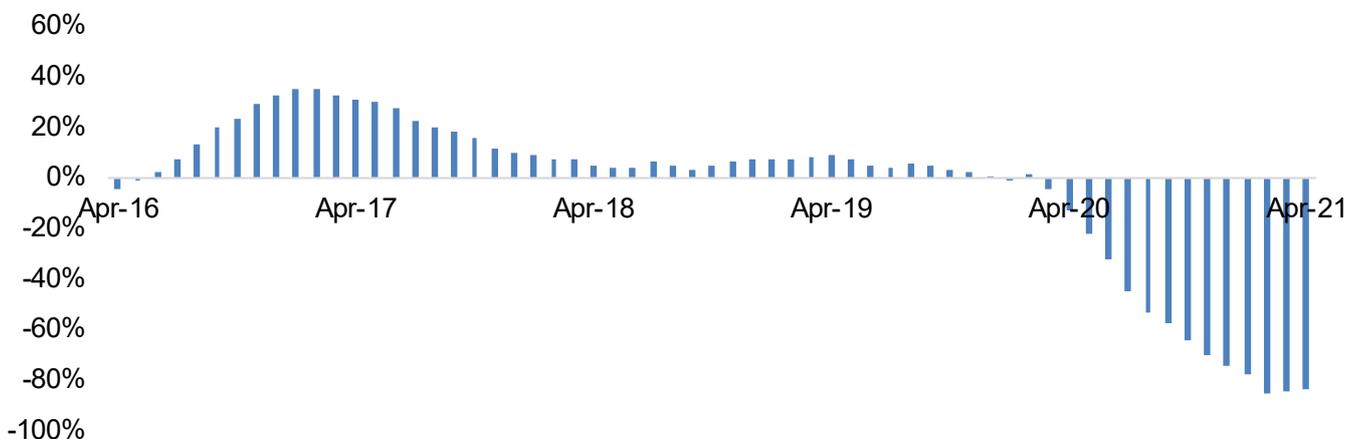
Source: NISRA Tourism Statistics (Occupancy Survey)

In the 12 months to April 2015 and estimated 320 thousand rooms were sold in Bed&Breakfasts, Guest Accommodation and Guesthouses in NI. From June 2016, the number of rooms sold in this type of accommodation started to rise. The peak was in the 12 months to February 2020 – 464,000 rooms. However the impact of COVID-19 was seen from April 2020 when the estimated number of rooms began to fall – the latest statistics show that in the 12 months to April 2021, 67 thousand rooms were sold – a fall of 83% from the previous year (figure 1.2). Users should note that the rooms sold in this sector are based on a sample survey and response rates can be low.

**Figure 1.4: Percentage change year on year in rooms sold in hotels (%)**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)

% change refers to the percentage change year on year)

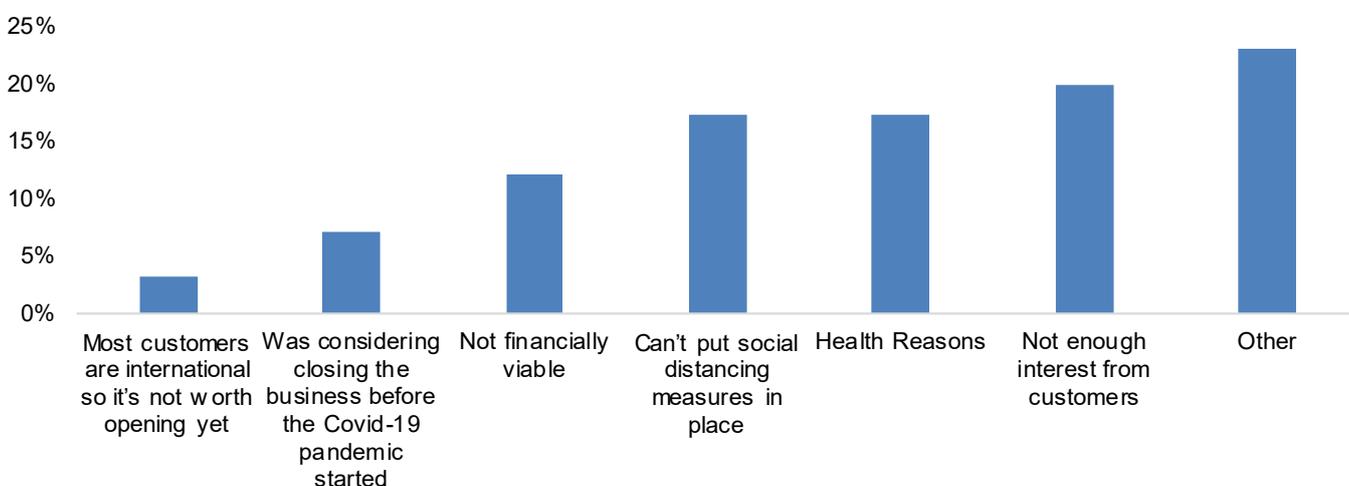


[Download chart data for <rooms sold in other establishments>>](#)

Source: NISRA Tourism Statistics (Occupancy Survey)

In September 2020, NISRA carried out a short survey regarding the impact of COVID-19 on establishments through NI. One quarter (24%) indicated that they did not open when restrictions were reduced on 3rd July 2020. Figure 1.5 shows the reasons that were provided. Respondents were able to provide more than one answer so double counting may occur.

**Figure 1.5 Reasons Establishments didn't open in July 2020**



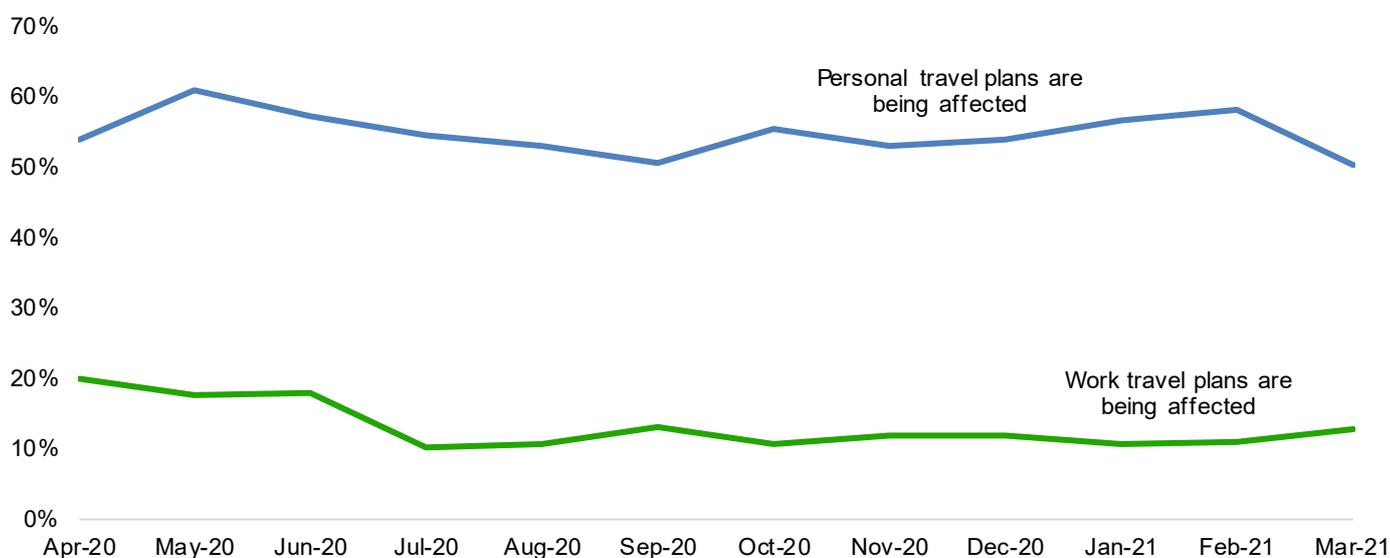
[Download chart data for <reasons not open in July 2020>](#)

Source: NISRA Tourism Statistics (Occupancy Survey)

## Section 2: NISRA Coronavirus (COVID-19) Opinion Survey

On 20 April 2020, NISRA launched a new Coronavirus (COVID-19) Opinion Survey designed to measure how the Coronavirus (COVID-19) pandemic was affecting peoples' lives and behaviour in NI. At various stages this survey has asked questions that can help to show how the COVID-19 pandemic has impacted tourism in NI. This section displays some of those results.

**Figure 2.1: In which way is Coronavirus affecting your life?**



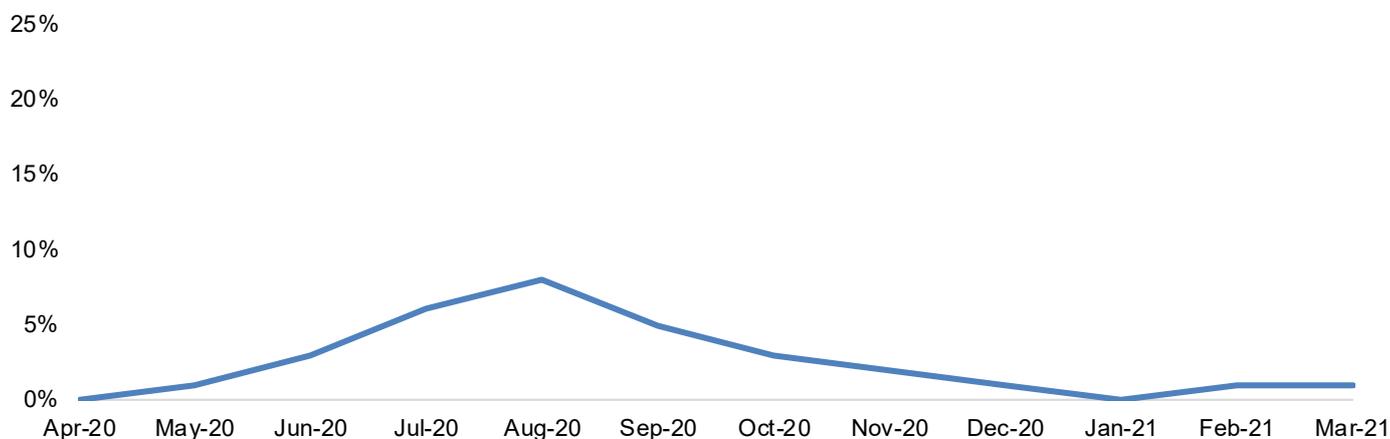
[Download chart data for <ways COVID affecting life COV C10M>](#)

Source: NISRA Coronavirus (COVID-19) Opinion Survey

Note that the number of interviews carried out after 31st March are too low to report separately in these results. Note that this question was only asked if answer to COV\_C9 (How worried or unworried are you about the effect that Coronavirus (COVID-19) is having on your life right now) showed that the respondent was very or somewhat worried

Figure 2.1 shows that personal travel plans are being affected more than work travel plans. On average personal travel plans have affected 55% of respondents compared to 13% of those who reported work travel plans being affected. (Respondents may report problems with both). Both personal and work travel plans were affected at higher rates at the beginning of the survey.

**Figure 2.2: In the past seven days, proportion of respondents who left their house to visit a tourist attraction**



[Download chart data for <visit tourist attraction>](#)

Note that the number of interviews carried out after 31st December are too low to report separately in these results.

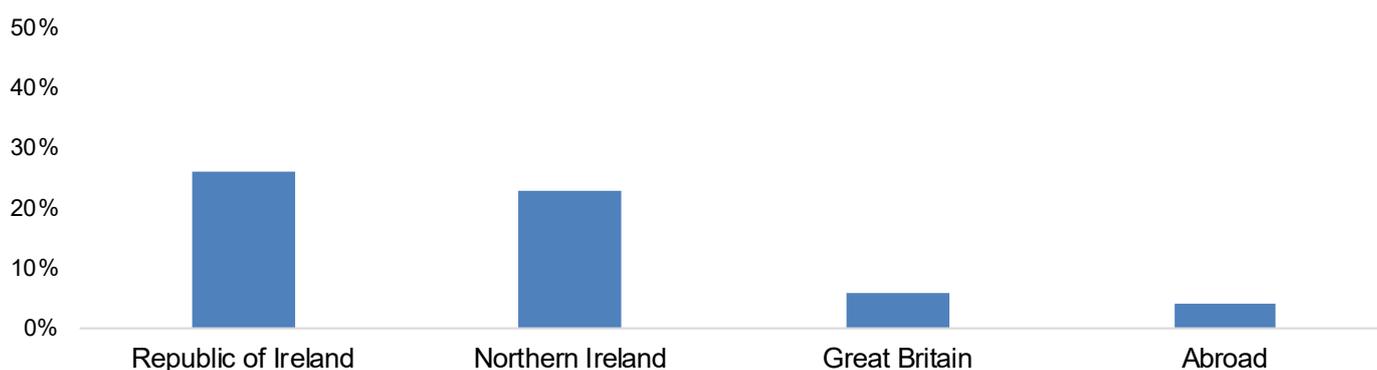
Source: NISRA Coronavirus (COVID-19) Opinion Survey

Figure 2.2 shows the proportion who responded to the NISRA Coronavirus (COVID-19) Opinion Survey who indicated they left their house in the 7 days before the interview to visit a tourist attraction. This shows as expected a peak in the summer months (August 2020=8%) when restrictions were reduced.

Some questions were included for some tranches so don't have a long timeframe.

**Figure 2.3: Proportion who indicated they went on holiday in Summer 2020**

(question "did you go on holiday in ... this summer?")



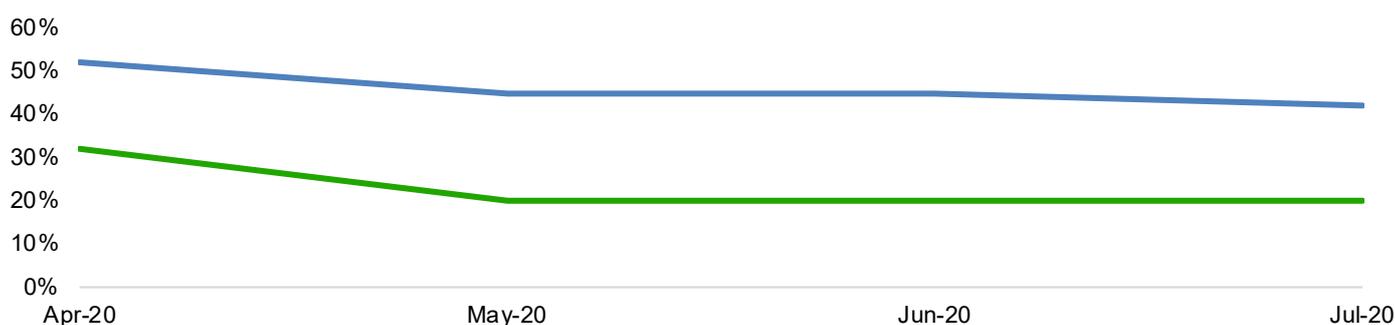
[Download chart data for <holiday in summer 2020 >](#)

Source: NISRA Coronavirus (COVID-19) Opinion Survey

Figure 2.3 shows the responses to the questions “did you go on holiday in <NI, RoI, GB, Abroad> this summer?” It should be noted that a respondent can respond yes to more than one location. This showed that 26% took a holiday in the Republic of Ireland and 23% in Northern Ireland, with less (6%) going to Great Britain and less again going abroad (4%).

Figures 2.4-2.6 show responses to other questions that were included in certain tranches of the NISRA Coronavirus (COVID-19) Opinion Survey which may provide some insight on the impact of COVID to tourism in NI.

**Figure 2.4: Ways in which Coronavirus is affecting your friends/family**

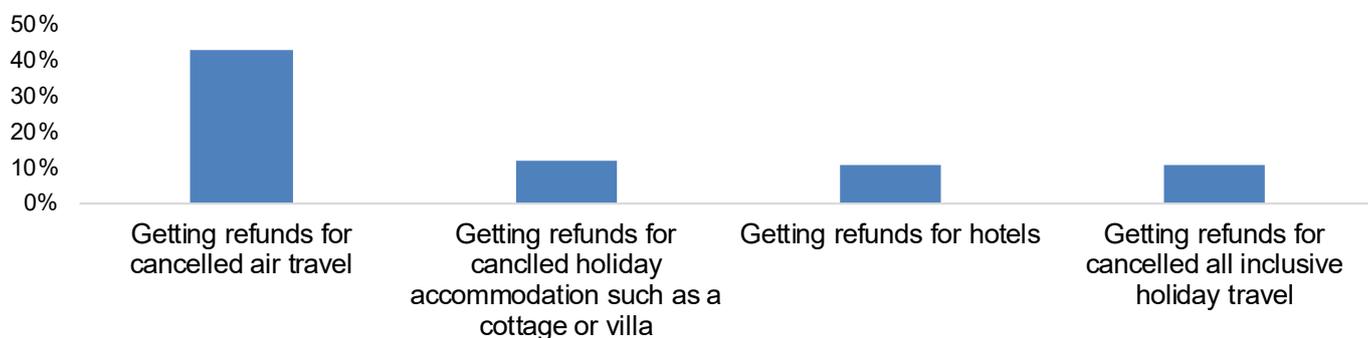


[Download chart data for <ways COVID affect F&F>](#)

Source: NISRA Coronavirus (COVID-19) Opinion Survey

Note that this question was only asked if answer to COV\_C31 (How worried or unworried are you about the effect that Coronavirus (COVID-19) is affecting your friends and family) showed that the respondent was very or somewhat worried. Note that the number of interviews carried out after 31st July are too low to report separately in these results.

**Figure 2.5: Problems experienced with companies since the Coronavirus outbreak**



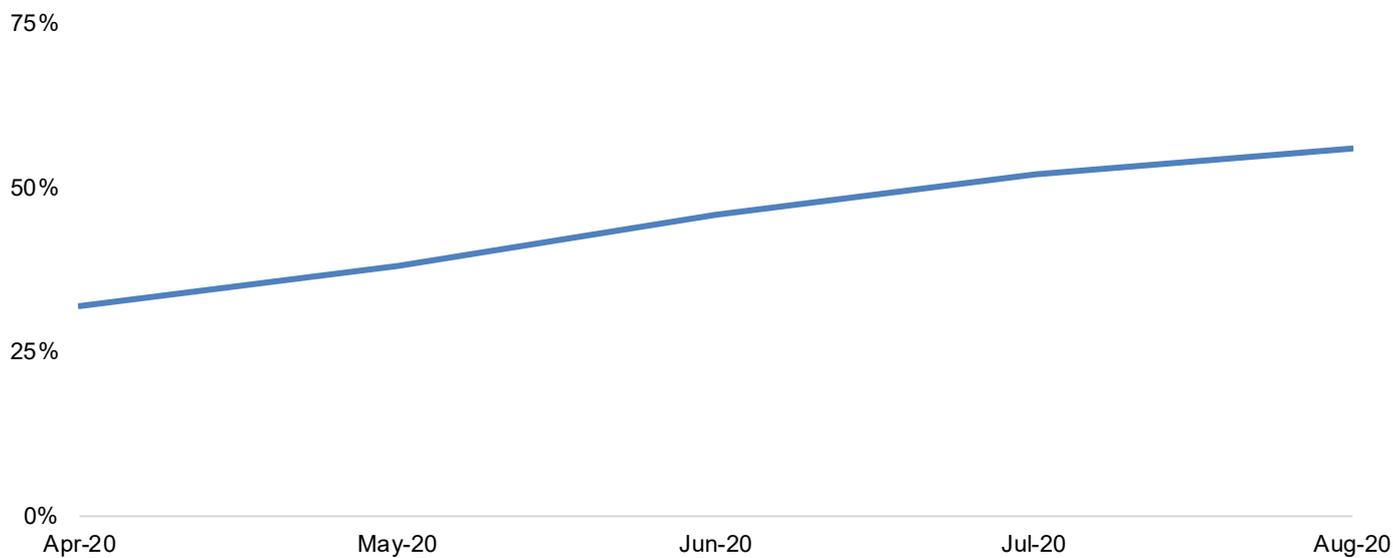
[Download chart data for Probs experienced with companies](#)

Source: NISRA Coronavirus (COVID-19) Opinion Survey

Note that the number of interviews carried out after 31st July are too low to report separately in these results.

Due to limitations around the question, it is not possible to differentiate between those people who had not experienced a problem because they did not have any contact with a company and those who had contact with a company but did not experience any problems with them. Those who reported "no problems experienced" have been excluded from the analysis.

**Figure 2.6: In the past seven days, proportion of respondents who left their house to visit a park or public green space**



[Download chart data for <visit park>](#)

Source: NISRA Coronavirus (COVID-19) Opinion Survey

Note that the number of interviews carried out after 31st August are too low to report separately in these results.

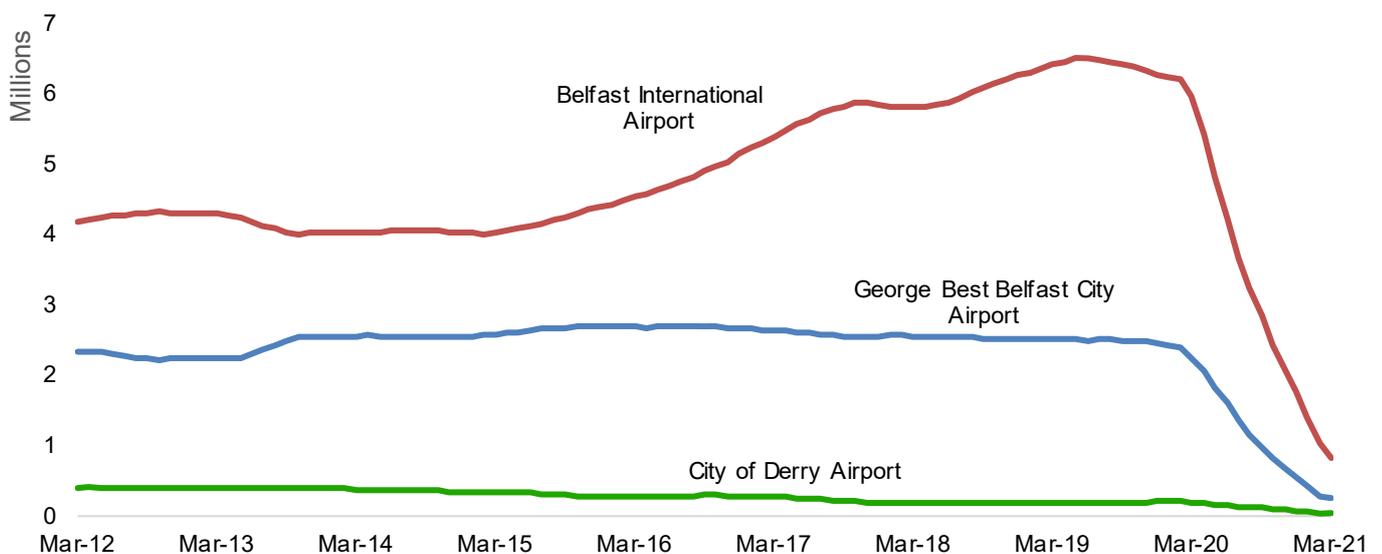
### Section 3: Air Passenger Flow

While visitors to Northern Ireland may come via ferry, and this may be even more important during the pandemic as travellers may feel more safe, another source that provides insight on tourism is air passenger flow through the airports. The Civil Aviation Authority (CAA) produces an administrative count on those travelling through UK airports (including NI). The Central Statistics Office (CSO) produces the same figures for the ports in Republic of Ireland.

Figure 3.1 shows the air passenger flow through NI Airports. It shows that Belfast International Airport (red line) had 4.2 million air passenger flow in the 12 months to March 2012, George Best Belfast City Airport had 2.3 million and City of Derry Airport had 0.4 million. In the 12 months to June 2019, air passenger flow through NI airports peaked (9.2 million). However, the impact of COVID-19 is clearly seen from March 2020 when travel was forbidden. In the 12 months to March 2021, a total of 1.1 million air passenger flow went through NI airports – 0.8 in Belfast International and 0.3 million at George Best Belfast City Airport.

**Figure 3.1: Air Passenger Flow through NI Airports**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)

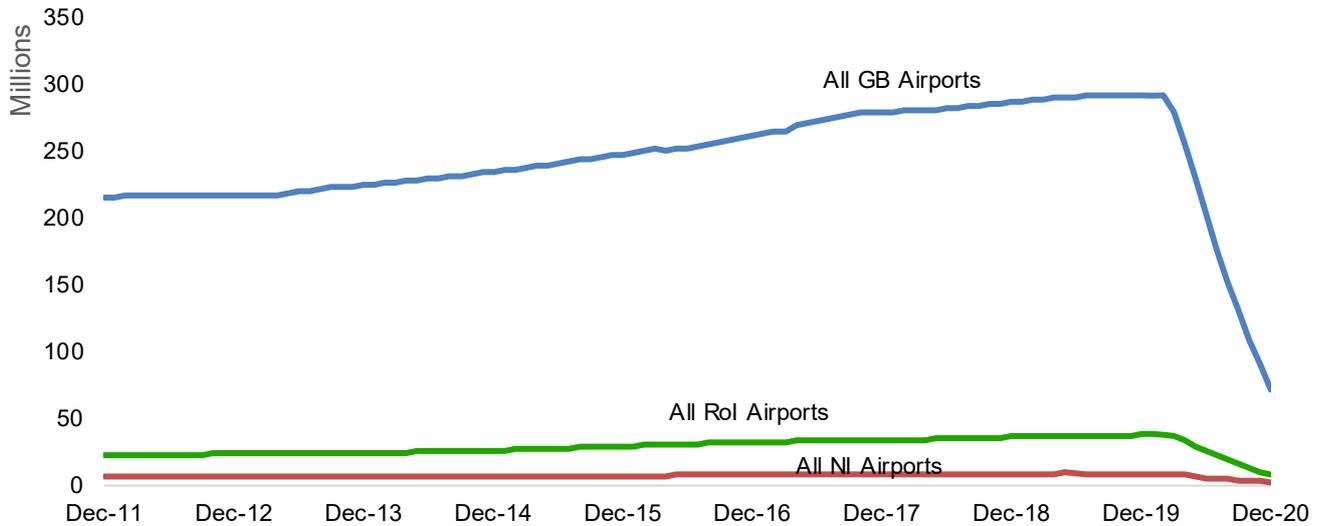


[Download chart data for <Air Passenger Flow>](#)

Source: NISRA Air Passenger Flow Statistics

**Figure 3.2: Air Passenger Flow through NI, Rol and GB Airports**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



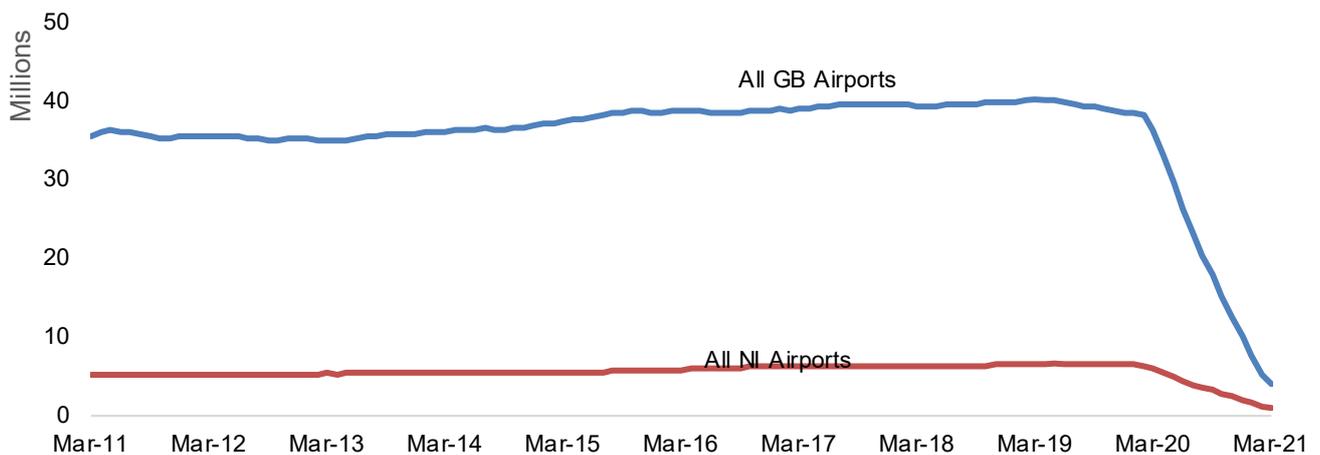
[Download chart data for <Air Passenger Flow>](#)

Source: NISRA Air Passenger Flow Statistics

The Civil Aviation Authority provide a breakdown in domestic air passenger flow and international air passenger flow. Figure 3.3 shows the domestic air passenger flow through UK Airports.

**Figure 3.3: Domestic Air Passenger Flow through UK Airports**

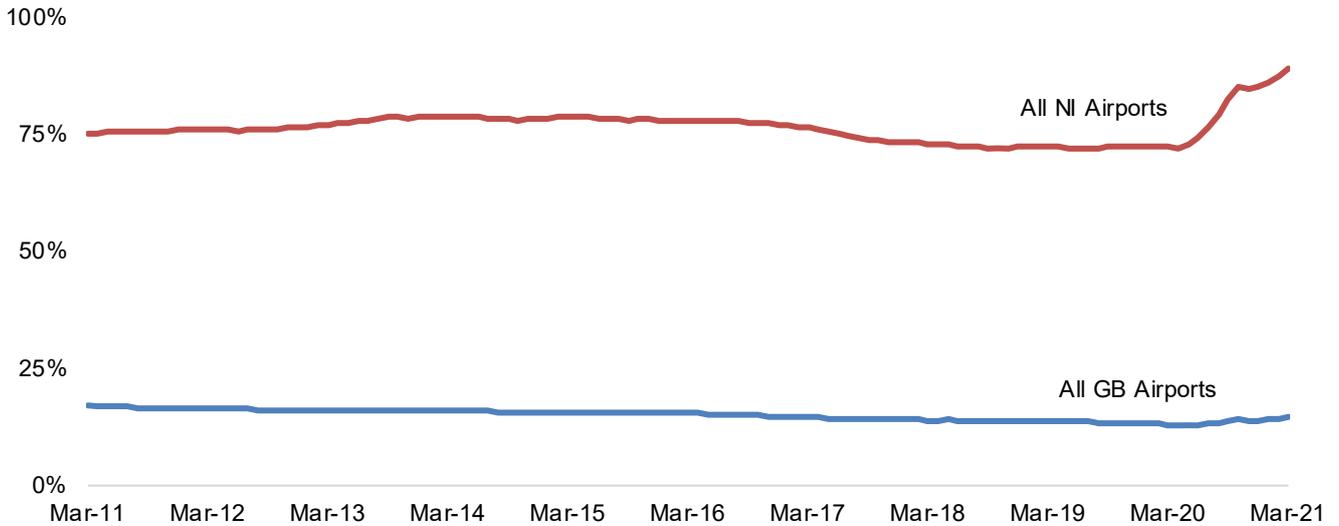
(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <Domestic Air Passenger Flow>](#)

Source: NISRA Air Passenger Flow Statistics

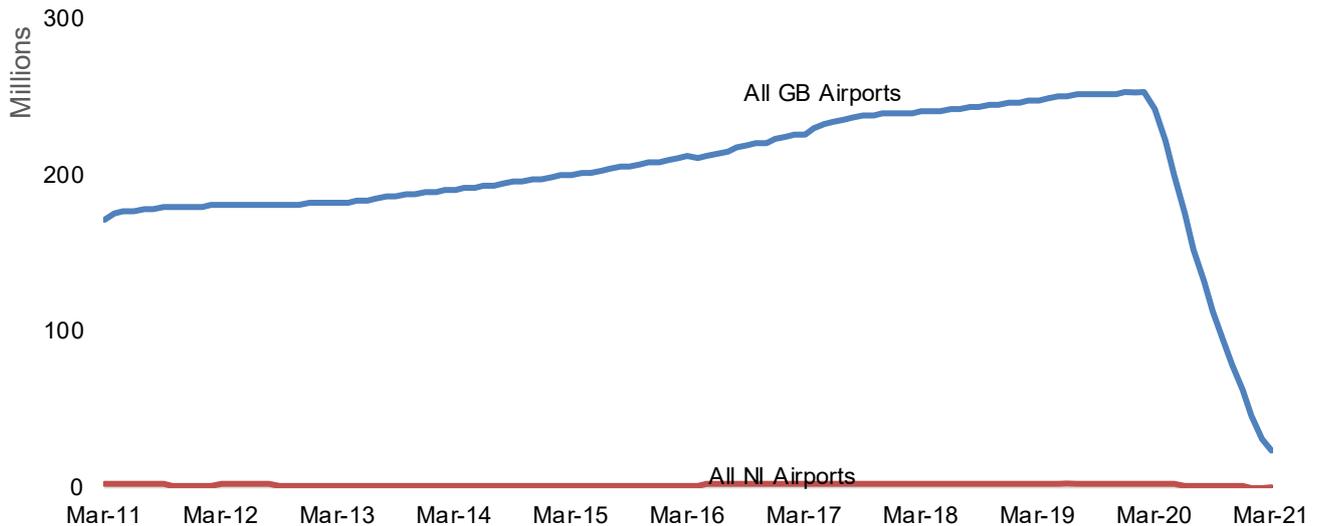
**Figure 3.4: Proportion (%) of Air Passenger Flow through UK Airports that is Domestic**  
 (12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <proportion Air Passenger Flow that is domestic>](#)

Source: NISRA Air Passenger Flow Statistics

**Figure 3.5: International Air Passenger Flow through UK Airports**  
 (12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <Air Passenger Flow>](#)

Source: NISRA Air Passenger Flow Statistics

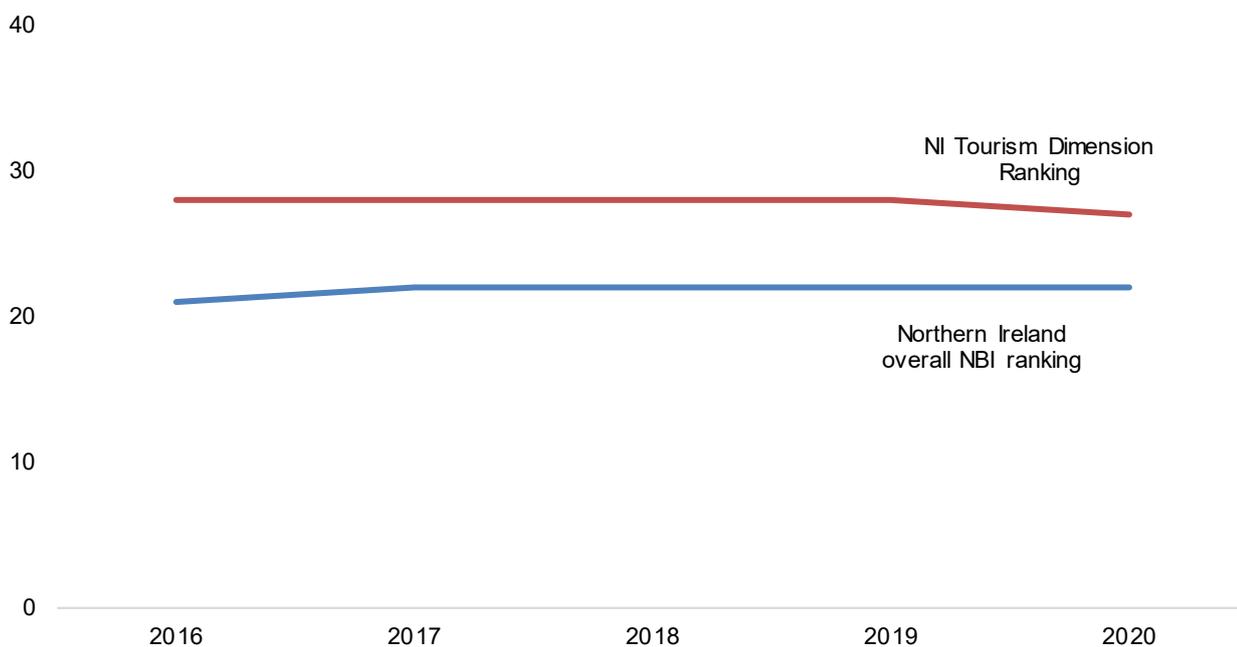
## Section 4: Nation Brands Index

The Anholt Ipsos Nation Brands index is used to assess and monitor Northern Ireland's international reputation. The NBI is an analytical tool which attempts to measure and rank the broad international reputation of 50 nations, across six dimensions of national competence: Exports, Governance, Culture, People, Tourism, and Immigration and Investment.

Figure 4.1 shows NI ranking overall (across the six dimensions of national competence) and for Tourism specifically. Northern Ireland's score for Tourism decreased to 64.11 in 2020, but was ranked 27<sup>th</sup> of 50 which was a rise from all previous years.

**Figure 4.1 Northern Ireland's Nation Brands Index Ranking**

(A lower score = more positive)



[Download chart data for <NBI Ranking>](#)

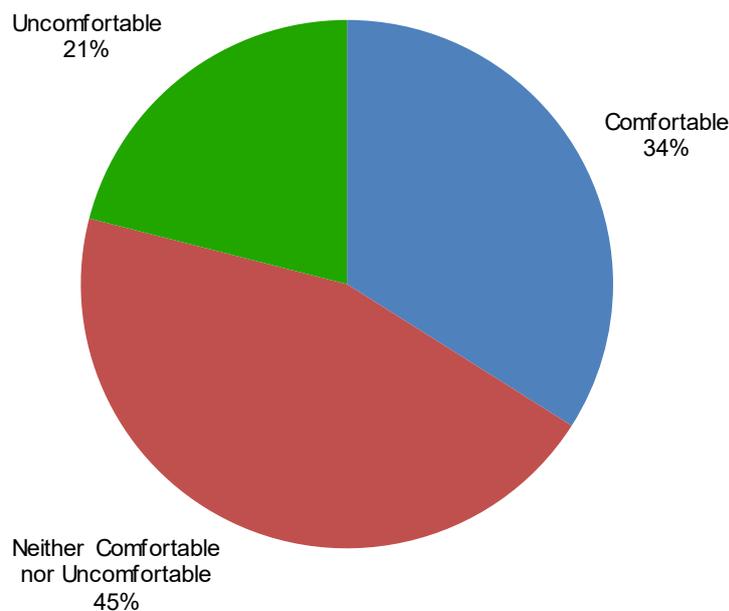
Source: NISRA Nation Brands Index

In 2020, a number of questions were added to the Nation Brands Index in response to the COVID-19 pandemic. These looked at how nations around the world perceive responses to the

healthcare crisis (including COVID-19) and, with that in mind, how comfortable respondents would be in visiting NI in the next five years.

Almost a third of global respondents rated Northern Ireland favourably in its handling of health crises. Over a third of respondents would be comfortable to visit NI in the next five years.

**Figure 4.2 Comfort with visiting NI in the next five years based on response to healthcare crises**



[Download chart data for <comfort in visiting NI in next 5 years>](#)

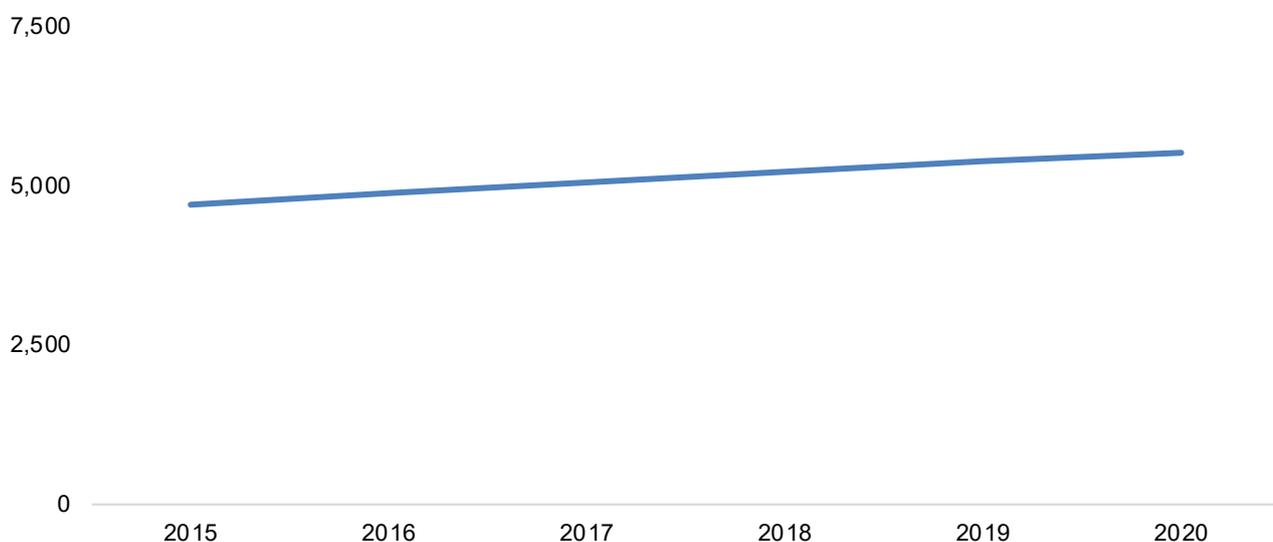
Source: NISRA Nation Brands Index

## Section 5: Tourism Related Industries

As tourism is not an industry in the traditional sense of the world and not defined as it's own sector, measuring tourism characteristic employment is complex. The UNWTO have defined tourism industries as tourism activities that typically produce tourism characteristic products. Tourism characteristic products are those that satisfy one or both of (1) tourism expenditure on the product being a significant share of tourism expenditure and/or (2) Tourism expenditure on the product should represent a significant share of the supply of the product of the economy. (The second criteria implies that supply of a tourism characteristic product would cease to exist in meaningful quantity in the absence of visitors. It is recognised that the terminology makes it difficult to define what industries should be included, however in the absence of another definition – NISRA has used the UNWTO definition which is comparable to other parts of the world.

This allows NISRA to include some economic and labour market statistics for Tourism related industries in NI.

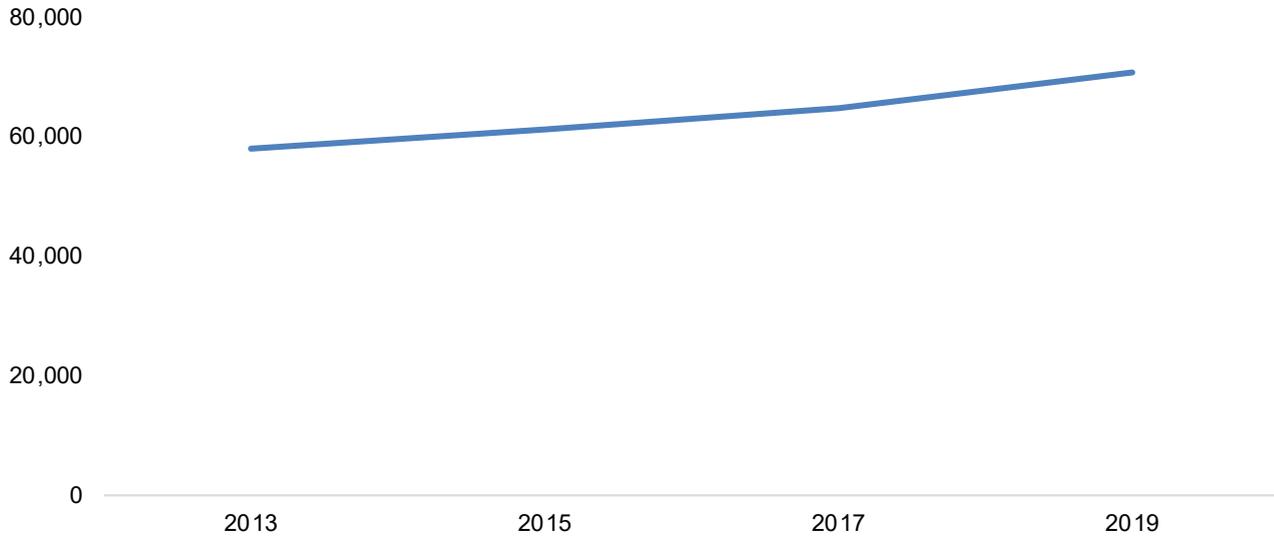
**Figure 5.1 VAT and/or PAYE Registered Tourism Businesses Operating in Northern Ireland**



[Download chart data for <tourism businesses>](#)

Source: NISRA Inter Departmental Business Register

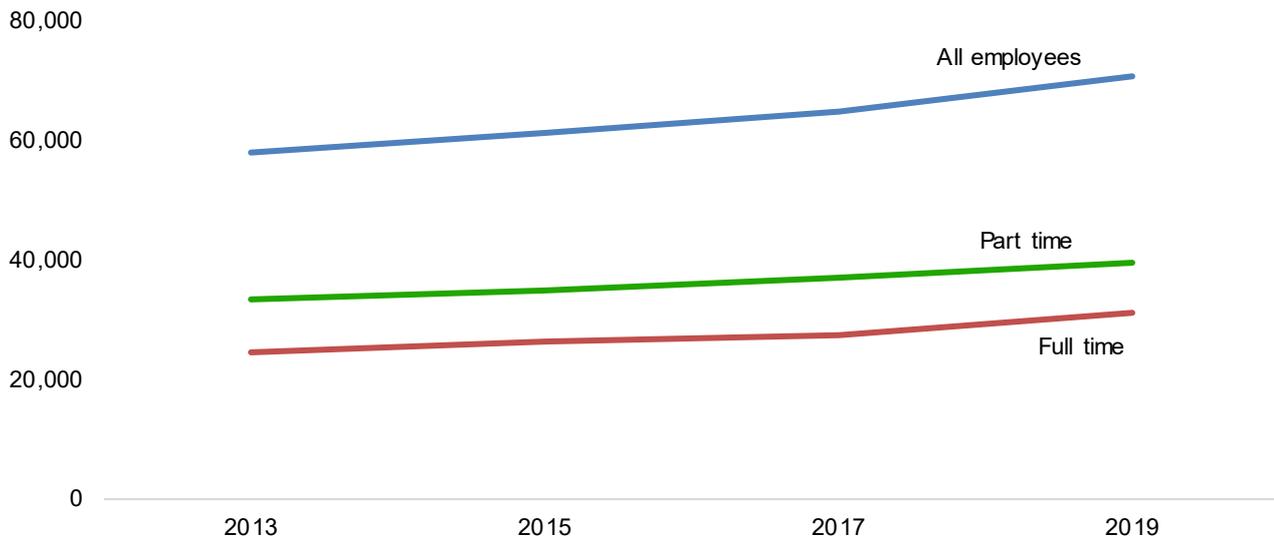
**Figure 5.2 Employee Jobs in Tourism Related Industries**



[Download chart data for <tourism jobs>](#)

Source: NISRA Business Register and Employment Survey

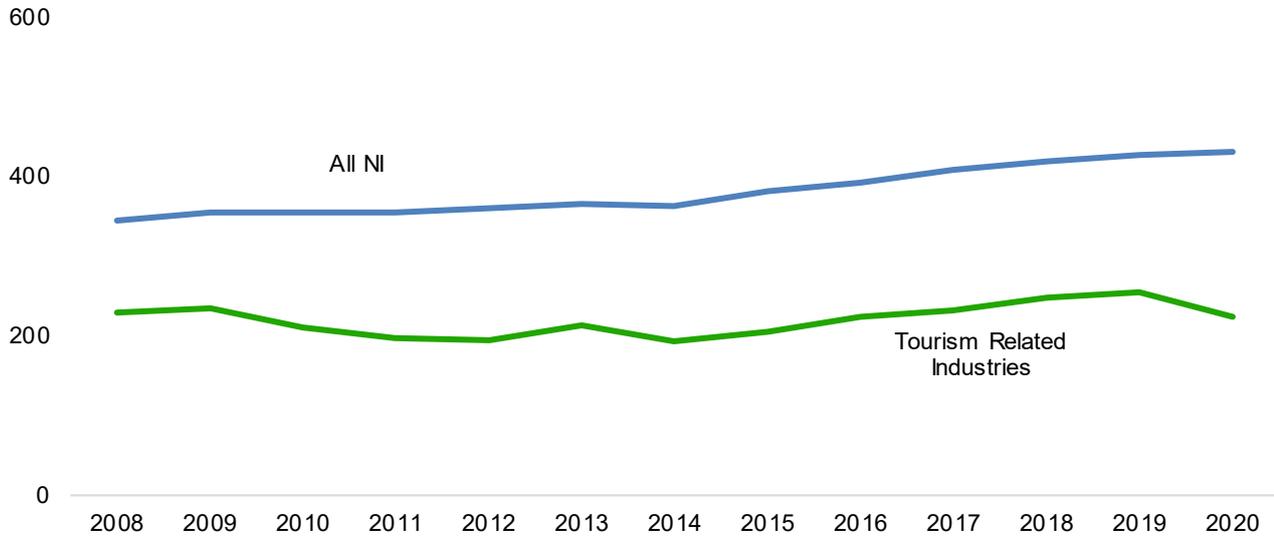
**Figure 5.3 Employee Jobs in Tourism Related Industries**



[Download chart data for <tourism jobs>](#)

Source: NISRA Business Register and Employment Survey

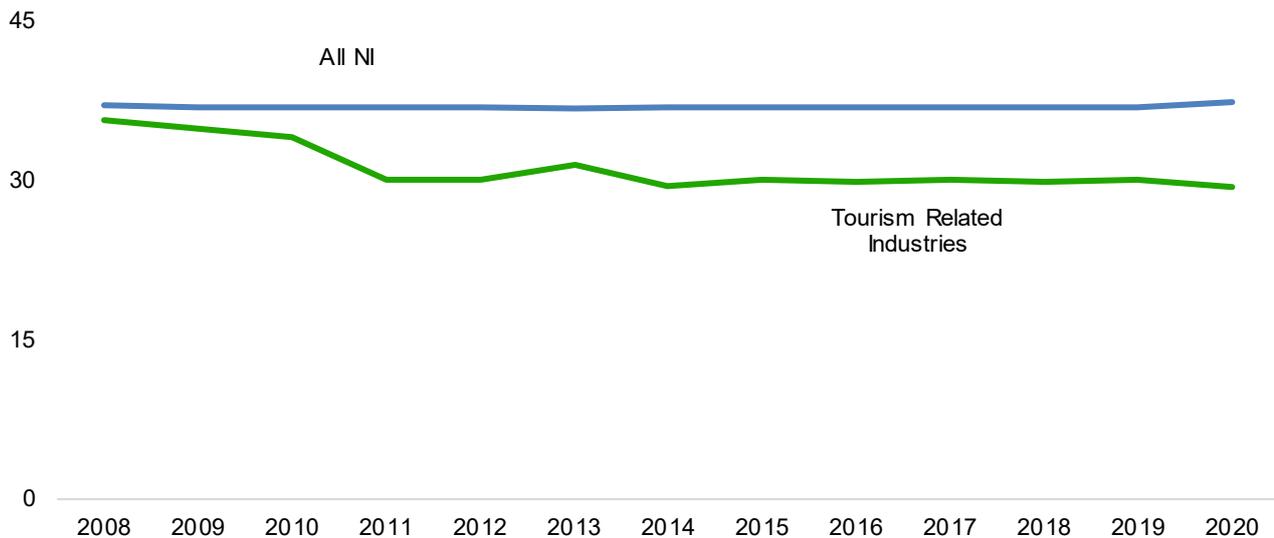
**Figure 5.4 Gross weekly pay (£) Tourism Related Industries**



[Download chart data for <tourism pay>](#)

Source: NISRA Annual Survey of Hours and Earnings

**Figure 5.5 Hours worked in Tourism Related Industries**



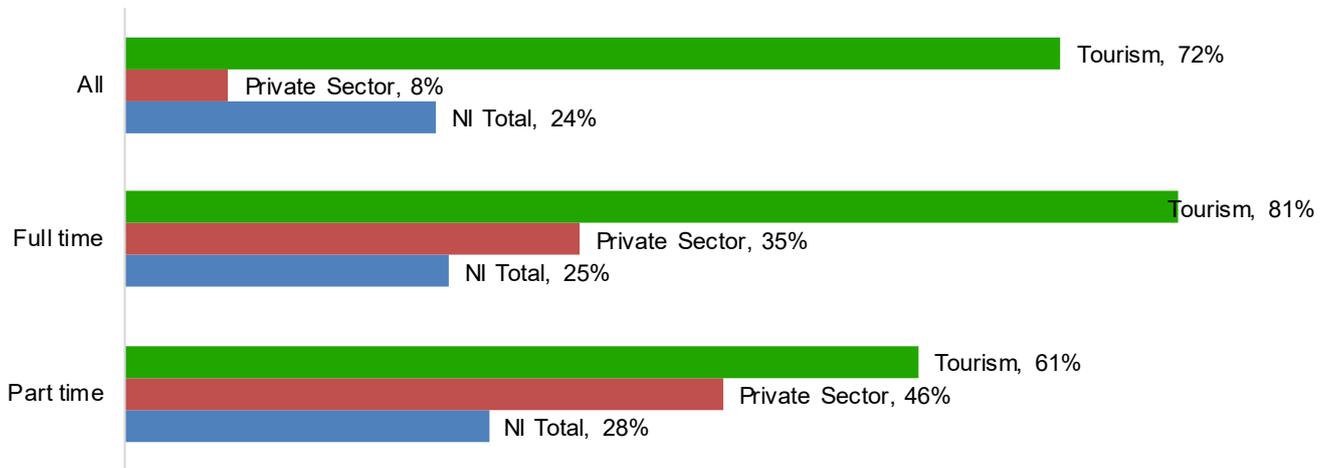
[Download chart data for <tourism hours>](#)

Source: NISRA Annual Survey of Hours and Earnings

During 2020, the Annual Survey of Hours and Earnings was carried out while employees may have been furloughed. Figures 5.6 and 5.7 show the percentage would were furloughed and

also the proportion of furloughed staff on reduced pay. They show how the tourism related industries had a large proportion of furloughed staff during the pandemic.

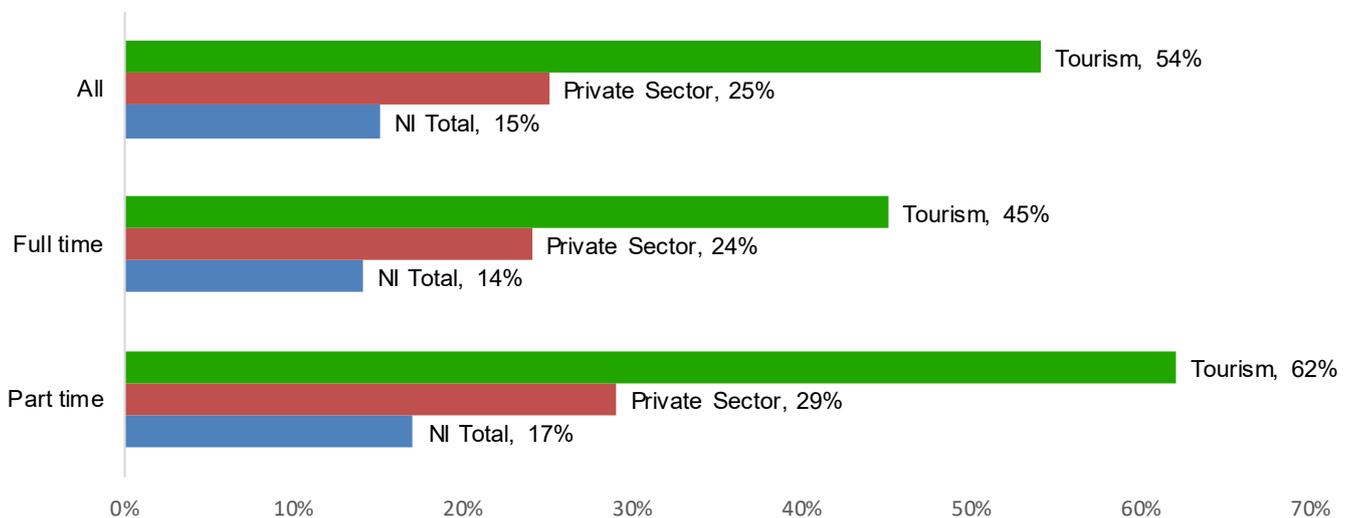
**Figure 5.6 Proportion furloughed staff, 2020**



[Download chart data for <ASHE furlough>](#)

Source: NISRA Annual Survey of Hours and Earnings

**Figure 5.7 Proportion furloughed staff on reduced pay, 2020**

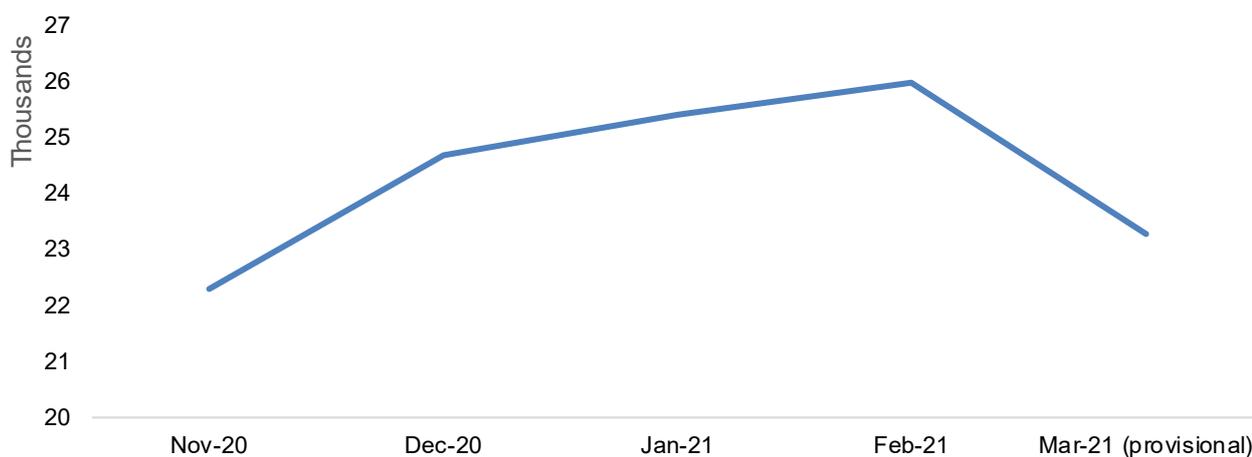


[Download chart data for <ASHE furlough>](#)

Source: NISRA Annual Survey of Hours and Earnings

The Office for National Statistics (ONS) have also published some data from the Coronavirus Job Retention Scheme. They found that 90% of employees who left the Coronavirus Job Retention Scheme (CJRS) between April and July 2020 were still on original payroll in August 2020. Due to the mentioned problems in defining those who work in tourism related industries – there are no breakdowns at this level. However, figure 5.8 shows the furlough scheme statistics for Northern Ireland and by the “Accommodation and food services” sector.

**Figure 5.8 Total number furloughed in Accommodation and Food Services, Northern Ireland (CJRS)**



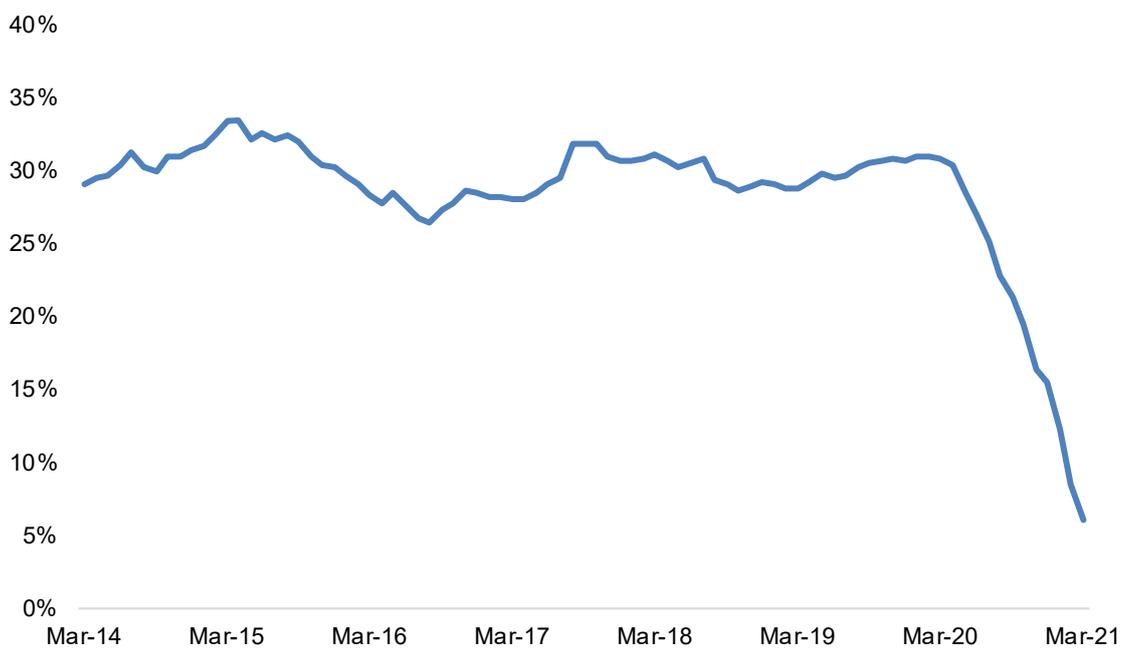
[Download chart data for <CRJS>](#)

Source: HMRC, CJRS and PAYE real time information

## Section 6: NI Residents Overnight Trips

NISRA collect information from the Continuous Household Survey on NI residents overnight trips. This usually informs users on the value and volume of “domestic tourism”. However since March 2020, due to the COVID-19 pandemic, face to face data collection has stopped which has resulted in lower response rates to the survey. Therefore, NISRA cannot produce the usual output from this survey. Instead, using rolling year data, data on the proportions of responses has been used to create figure 6.1 on NI overnight trips. Figure 6.2 provides a breakdown by the destination of these overnight trips.

**Figure 6.1 Proportion of overnight trips taken by NI residents (per 100 interviews)**  
(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)

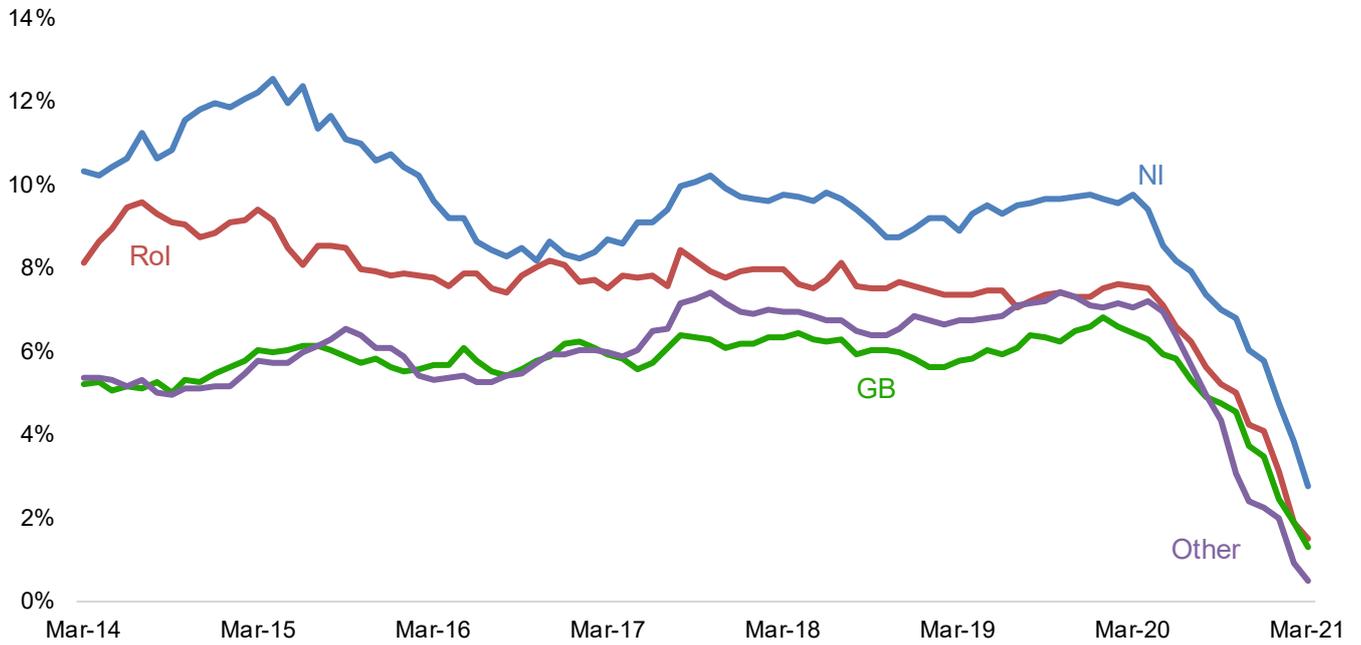


[Download chart data for <overnight trips>](#)

Source: NISRA Tourism Statistics

**Figure 6.2 Proportion of overnight trips taken by NI residents (per 100 interviews)**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)



[Download chart data for <overnight trips>](#)

Source: NISRA Tourism Statistics

## **Section 7: Other Data Sources**

### **Overseas Travel and Tourism, ONS**

The Office for National Statistics has estimated that there were 11.1 million visits made to the UK by international visitors during 2020, this is 73% fewer than in 2019. During these visits in 2020 it was estimated that £6.2 billion was spent in the UK – 78% less than the previous year.

ONS usually use the International Passenger Survey to estimate figures on visits to the UK, however for 2020 figures from April – December were based on administrative sources and modelling. This means that there are no further geographical breakdowns.

It was also estimated during 2020 that UK residents made 23.8 million visits abroad (74% less than in 2019) and spent £13.8 billion during these trips (78% less than in 2019).

### **Online job posting trends, 2021**

The Department for the Economy (DfE) in Northern Ireland has been producing a monthly factsheet with details of online job postings. The factsheet includes an assessment of selected sectors as well as skills in demand. Some of the latest online job postings by employers are featured along with signposting to resources and support.

The April 2021 online job posting trends showed that there was a 144% increase in the Accommodation and Food Sector jobs from March.

### **Transport Infrastructure Ireland – traffic count at 15 NI-IE border locations**

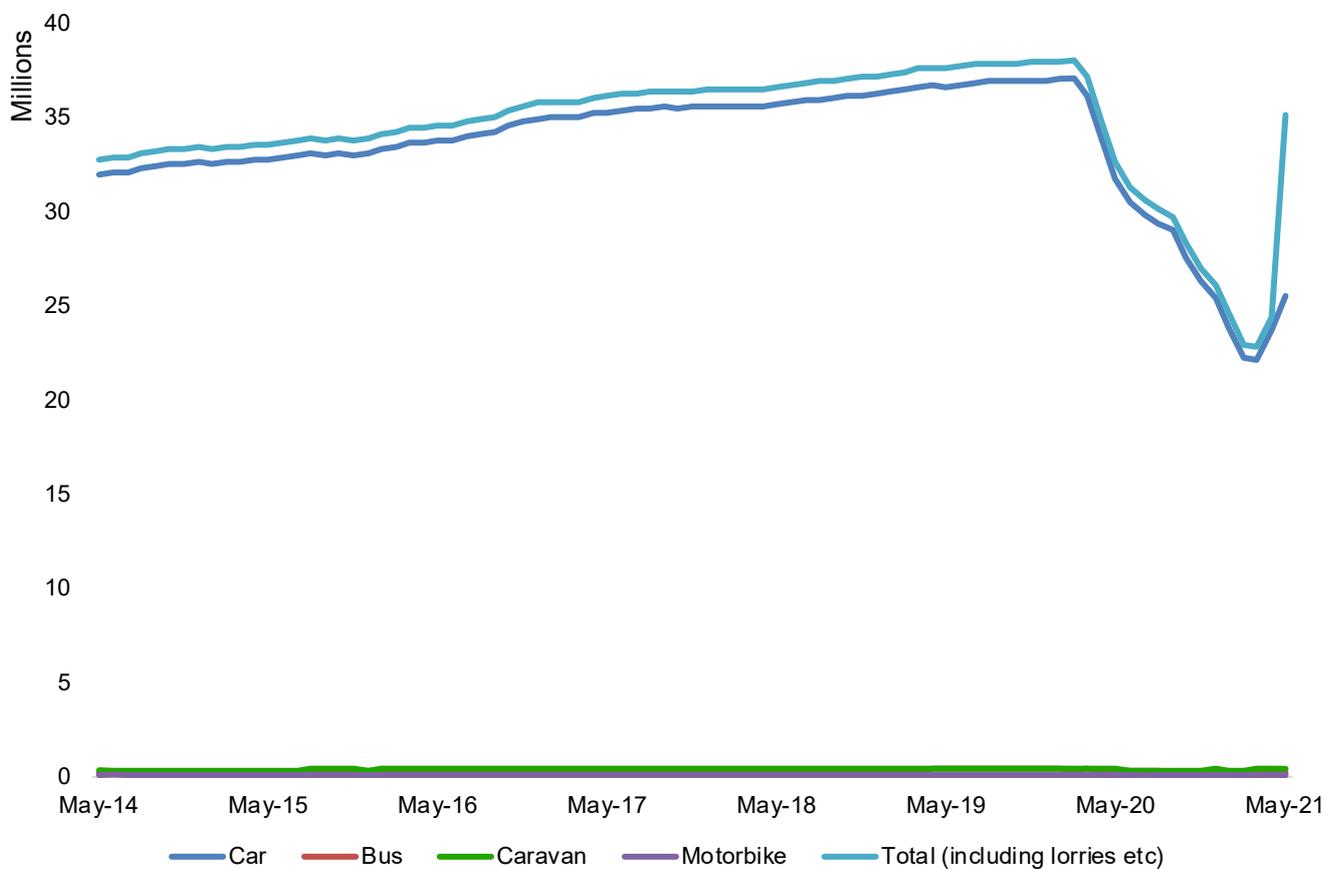
NISRA EU Exit branch have been publishing data on traffic crossing the NI-IE border at 15 locations. This provides information on the type of transport (car, caravan, motorbike, lorries, etc). Figure 7.1 shows the traffic counts and figure 7.2 shows the change year on year. The figures are from Transport Infrastructure Ireland Traffic Data and is collected from the TII traffic

counters location on the National Road Network of Ireland. The data is collected at fifteen border locations, and are therefore a subset of all border crossings and would not present full coverage of all vehicle border crossings. Due to the location of the traffic counters, it is possible that vehicles captured in the data do not cross the NI-IE border.

Users will be interested in particularly the caravan statistics as in the 12 months to May 2021, 429 thousand caravans crossed the border – this is the peak number of caravans crossing the border since 2014. Similarly, over 86,000 motorbikes crossed the border in this time period – the highest since the 12 months to April 2020.

**Figure 7.1 Traffic count at NI-IE border**

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun)

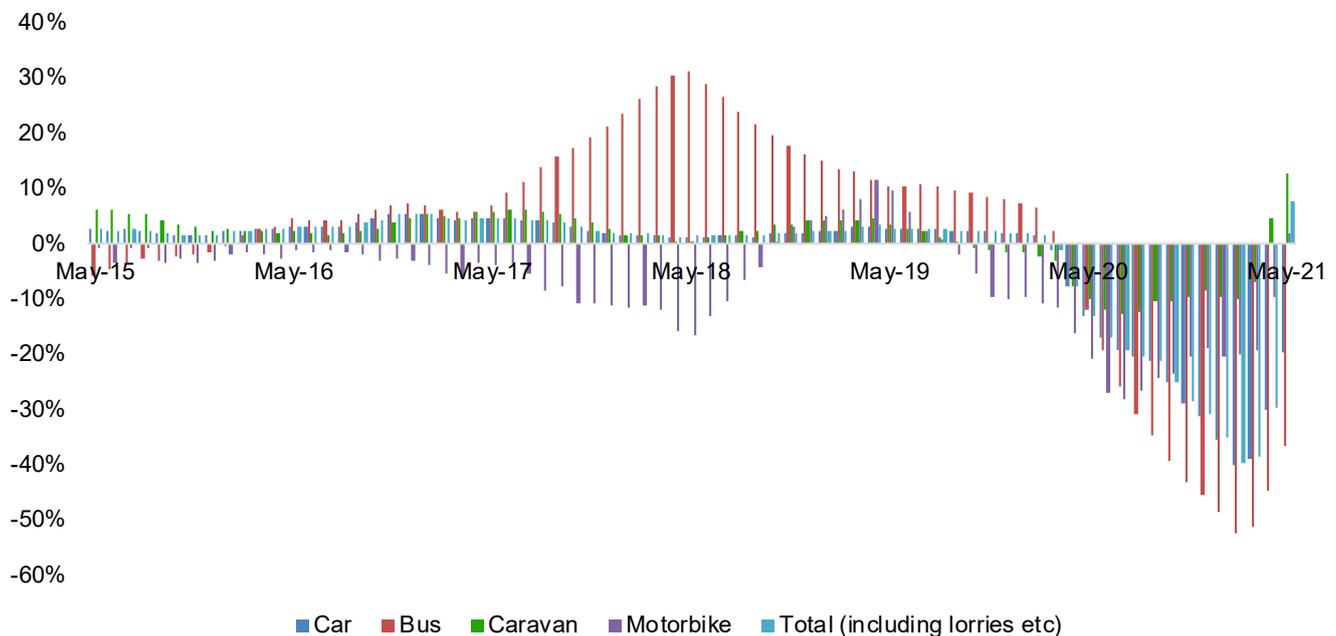


[Download chart data for <traffic count at NI IE border>](#)

Source: NISRA EU Exit Branch

## Figure 7.2 Change in Traffic count at NI-IE border

(12 month rolling data = Dec refers to Jan-Dec, Jun refers to Jul-Jun  
% Change)



[Download chart data for <traffic count at NI IE border>](#)

Source: NISRA EU Exit Branch

## Motorhome Ownership

The Driver and Vehicle Agency (DVA) in Northern Ireland reported that in 2020, there were 5,611 motorhomes licenced in Northern Ireland.

## Travel Trends 2021 and beyond

Tourism Northern Ireland have put together a special edition of their “Tourism 360” entitled “Travel Trends outlook : 2021 and beyond”. This report highlights the significant evolving global trends that will influence travel and tourism in the months ahead. The short eZine provides an overview of the consumer and industry trends that are most likely to influence visitor expectations.

The trends the eZine covered included:

**Health and wellbeing:** the development of vaccines has increased hopes of traveller confidence, but health and wellbeing will top the agenda for years to come.

**Conscious travel:** The COVID-19 crisis has boosted consumer awareness of sustainability, and galvanised conversations about building back better.

**Digital transformation:** Virtual travel experiences, touchless tech solutions and digital customer service may sustain prospective travellers' interest during lockdown and help restore confidence.

**The resilient traveller:** the fundamental desire to travel remains unchanged, but cautious consumers will seek reassurance and flexibility from travel providers.

**The next normal for tourism and travel:** The second spike in COVID-19 cases has subdued momentum going into 2021, but the short term outlook suggests recovering confidence as well as ongoing uncertainty.

## Feedback

Users are invited to feedback on this publication on the below details. The report was pulled on a temporary basis while tourism sources are not produced, but it would be beneficial to know if it is meeting your needs and if you will require this updated going forward.

## Further information

If you require further information about the figures contained in this publication or the accompanying tables, please contact Joanne Henderson using the details below:

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*(please note staff are currently working from home, so it would be quicker to contact via email)*

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tourismstatistics@nisra.gov.uk