

Northern Ireland Tourism Statistics 2012

4th July 2013



Tourism

Annual Bulletin

Dundonald International Ice Bowl
 Giants Causeway
 Portstewart Strand
 W5 Botanic Gardens
 Crawfordsburn Country Park
Titanic Belfast
 The Peace Bridge Belfast Zoo
Pickie Fun Park Lagan Valley Regional Park
Derry Walls Ulster Museum
Roe Valley Country Park Delamont Country Park
 Oxford Island National Nature Reserve
 Carrick a Rede Rope Bridge

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Key findings

Overnight visitors to Northern Ireland

- The estimated total number of overnight visitors to Northern Ireland in 2012 (3.97 million) was similar to that in 2011 (3.96 million). This estimate includes overnight visits by NI residents and visitors from outside NI.
- When NI residents are excluded, the total number of visitors from outside NI staying at least one night in NI was estimated to have increased by 3% (52,000) over the year from 1.93 million in 2011 to 1.98 million in 2012.
- The estimated increase in visitors from outside NI (3%) included:-
 - a 16% (+ 60,000) increase in visitors from the RoI (to 0.43 million)
 - a 2% (-18,000) fall in visitors from GB (to 1.03 million)
 - a 2% (+10,000) increase in overseas visitors (to 0.52 million);
- When visitors from RoI are also excluded, the number of GB and overseas visitors to NI was relatively constant (1.56 million 2011; 1.55 million 2012).
- Overnight visits by NI residents fell by 2% (-48,000) from 2.03 million in 2011 to 1.98 million in 2012.

Tourism expenditure

- Although total visitor numbers remained virtually unchanged, total tourist expenditure (by domestic residents and visitors from outside NI) was estimated to have increased by 7% between 2011 and 2012. This represented an estimated increase of £42 million from £640 million to £683 million over the year.
- When NI residents are excluded, the increase in the number of visitors from outside NI staying at least one night (3%) also resulted in increased expenditure. This rose by an estimated 5% (£25 million) from £463 million in 2011 to £488 million in 2012.

Reason for visit by visitors from outside NI

- There were 100,000 more external visitors who said that main reason for their visit in 2012 was for “holiday” purposes, compared to 2011. This represented an increase of 19% over the year from 0.53 to 0.63 million of such visitors. The largest decrease (-63,000 or -6%) in external visitors occurred among those who said they came to NI to “visit friends & relatives”.

Table 1 Estimated trips (thousands), and associated expenditure (£m) by visitors to NI 2011, 2012⁽¹⁾

	Trips (000's)		Change over the year (%)	Expenditure (£m)		Change over the year (%)
	2011	2012		2011	2012	
GB visitors ⁽²⁾⁽³⁾	1052	1034	-2	235	244	+4
Overseas visitors ⁽²⁾⁽³⁾	509	519	+2	168	174	+4
Total GB and Overseas visitors⁽²⁾⁽³⁾⁽⁴⁾	1561	1554	0	404	418	+3
ROI visitors ⁽⁵⁾	370	430	+16	59	70	+19
Total visitors from outside NI⁽⁴⁾	1931	1984	+3	463	488	+5
Domestic overnight trips ⁽⁶⁾	2029	1981	-2	177	195	+10
Total⁽⁴⁾	3960	3965	0	640	683	+7

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) with a sample size of 12,600 and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, with an achieved sample size of 300 (rounded to nearest 100) in 2012.
- 3) Figures for 2011 and those previously published for the 1st 3 quarters of 2012 have been revised (see background notes at end of this document for details). SOT figures are now based on a 3 year rolling average
- 4) Figures may not add to totals due to rounding
- 5) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO – sample size 400 (rounded to nearest 100) in 2012). Figures for 2011 have been revised.
- 6) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012

Occupancy Rates and Visitor attractions

- Hotel room occupancy rates increased from 59% in 2011 to 65% in 2012. Guest House and B&B occupancy rates also increased from 29% to 33% over the period. Bed space occupancy rates grew from 41% to 45% in hotels and from 21% to 23% in guesthouses/B&B establishments.
- During January - December 2012, hotels in Belfast & Castlereagh area experienced the highest rates in room and bed-space occupancy (75% and

54% respectively), while hotels in the Mid West experienced the lowest room and bed-space occupancy rates (46% and 30%).

- Guesthouse and B&B room occupancy rates were highest in the North East (35%) and lowest in the Mid West (20%), although rates in the Mid West increased by 6 percentage points compared to the same period in 2011.

Table 2 Room and bed space occupancy rates Northern Ireland 2011, 2012.

	Room Occupancy (%)		Change over the year (p.p.)	Bed space Occupancy (%)		Change over the year (p.p.)
	2011	2012		2011	2012	
Hotels ⁽¹⁾	59	65	+7	41	45	+4
Guest Houses, B&Bs ⁽¹⁾⁽³⁾	29	33	+4	21	23	+2
				Unit Occupancy (%)		C.o.Y. (p.p.)
Self Catering establishments ⁽¹⁾⁽³⁾				27	28	+1

Notes:

- 1) Figures are derived from the monthly census of hotels and sample of guest houses and bed and breakfast establishments conducted by NISRA with an achieved average sample size of 62 for hotels and 114 for guest houses and bed and breakfast establishments and an average response rate of 45% for hotels and 30% for guest houses and bed and breakfast establishments
- 2) Figures are derived from the annual survey of self catering establishments conducted by NISRA with an achieved sample size of 400 and a response rate of 28%
- 3) Estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes

- Visits to visitor attractions in NI increased by 6.3% to 12.8 million in 2012.

Table 3 Total visits to visitor attractions

	2011	2012	Change over the year (%)
Total visits	12.0 million	12.8 million	+6

Notes:

- 1) Figures are derived from the annual census of visitor attractions conducted by NISRA with an achieved sample size of 147 and a response rate of 38%. Percentage change over the year has been calculated using data from those establishments which provided figures for both 2011 and 2012

Background

This NISRA bulletin brings together a range of estimates and profiles of tourist activity in Northern Ireland (NI) to help provide an overall assessment of the volume of overnight visitors to NI, their length of stay and the direct value of their expenditure in 2012, relative to earlier years. Information is also provided from occupancy surveys of tourist accommodation as well as information on visits to visitor attractions, to provide an overview of tourist activity.

The information provided helps inform a range of users including those in government charged with the development of tourism policy, Members of the Legislative Assembly (MLAs), tourism implementation bodies (such as the NI Tourist Board and Tourism Ireland) and the tourism industry. The measures reported in this publication 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.

Definitions

The definitions of tourist activity used in this report are based on the International Recommendations on Tourism Statistics (IRTS, 2008) from the United Nations World Tourism Organisation (UNWTO). This defines tourism by the activities of persons identified as visitors. A visitor is someone who is making a visit to a main destination outside his/her usual environment for less than a year for any main purpose [including] holidays, leisure and recreation, business, health, education or other purposes, including visiting friends and relatives. This scope is much wider than the traditional perception of tourists, which includes only those travelling for leisure.

If a resident is travelling within their own country (NI) they are referred to as domestic visitors in the report, whereas visitors to NI by people who live outside of that country are referred to as external visitors. Thus both GB, overseas and RoI visitors are termed as external visitors.

Sources of information

The PfG targets relate to all overnight tourists who visit NI including visitors from (i) Great Britain (GB) and overseas markets (ii) the Republic of Ireland (RoI) as well as (iii) NI residents taking overnight trips within NI. While this publication provides information on tourists from each of these areas, NISRA does not have direct responsibility for the collection of all such information, some of which is provided from organisations in the RoI. The methodology is also subject to ongoing development and these estimates are therefore deemed to be experimental statistics in line with the Code of Practice (see below). Some of the estimates are based on relatively small sample sizes and will have an associated degree of sampling error. These are reported where available along with information on sample sizes to inform users of the relative quality of the estimates (see section on data quality in the background notes in this document).

Revisions

Please note that there have been revisions to some components of the 2011 and 2012 GB and overseas visitor estimates. Details of these revisions can be found in the revisions section of the background notes.

Code of Practice

The production of those tourism statistics for which NISRA is responsible is conducted in line with the principles of the Official Statistics Code of Practice <http://www.statisticsauthority.gov.uk/assessment/code-of-practice/code-of-practice-for-official-statistics.pdf>. These principles include the requirement to produce official statistics objectively, impartially and with honesty and integrity.

NISRA has recently consulted on some proposed changes to the reporting of tourism statistics http://www.detini.gov.uk/deti-stats-index/tourism-statistics/user_engagement.htm and will be publishing a summary of user views to inform how tourism statistics are produced and reported. User views are welcome at any time in line with the Code of Practice and any comments on the methodology or reporting format used in this report can be forwarded to Tourismstatistics@detini.gov.uk

Commentary

Previous research¹ has shown that a relatively high percentage (5.9%) of Northern Ireland's output (2008) is accounted for by those industries associated with the tourist economy. While this is not a comprehensive measure of tourism's contribution to the economy (these businesses also sell to non-tourists), it is a useful indicator of its significance. The NI2012 campaign has also highlighted that tourism is a key element of Northern Ireland (NI) government's plans to grow the economy in a sustainable way. The current report provides further detailed information on the direct contribution of tourist expenditure to the local economy in 2012, from a range of sources.

The combined survey estimates indicate that there were some 3.97 million overnight visitors who spent some £683 million on tourism related activities in NI in 2012. While the total number of (domestic and external) tourists in 2012 was virtually unchanged relative to 2011 there was nevertheless an estimated 7% (£42m) increase in tourist expenditure over the period.

NI and GB visitor numbers fall; RoI and overseas' visitors increase

More RoI residents (+60,000) and those from overseas (i.e. non GB) countries (+10,000) visited Northern Ireland in 2012, compared to 2011. However, this increase was almost entirely offset by an estimated 2% fall in overnight visitors from GB (-18,000) and a 2% decline (-48,000) in the number of NI residents taking overnight trips within NI.

GB visitors account for 50% of all external visitors' spend

Great Britain remains the largest single market with tourism expenditure of £244 million in 2012. This represented 36% of total (domestic and external) tourism expenditure and 50% of expenditure by all visitors from outside NI. The GB and overseas markets together accounted for some £418 million (61%) of overall tourism spend in 2012, with the RoI contributing a further £70 million (10%) and local residents spending £195 million (29%).

Increase spend across all main market groups

Despite a reduction in the number of visitors from GB and NI residents' visits, all market groups reported increased expenditure over the year to 2012. GB visitors spent an additional £8 million, overseas visitors spent a further £6m, RoI residents' spend increased by £10 million and NI residents spent a further £18 million over the period. Of the £42 million annual increase, GB and overseas visitors therefore contributed about a third (£14 million) with 42% of the increase accounted for by NI residents' expenditure on overnight trips (+£18 million).

More external "holiday" visitors, fewer "visiting friends and relatives"

There were an estimated 100,000 more visitors from outside Northern Ireland who gave the main reason for their visit as being for "holiday" purposes (631,000) in 2012, compared to 2011 (Table 2). However, the number of persons visiting friends and relatives fell by 6% (63,000) to 921,000 in 2012. The number of business visitors remained relatively constant (304,000 in 2012, compared to 305,000 in 2011).

¹ http://www.ons.gov.uk/ons/dcp171776_239218.pdf

Rise in accommodation occupancy rates

Room and bed-space occupancy increased in both hotels and guesthouses/guest accommodation/bed and breakfast establishments in 2012 compared with 2011. Room occupancy rates rose from 59% to 65% in hotels and from 29% to 33% in Guesthouses/Guest Accommodation/Bed & Breakfast establishments.

Increase in visits to tourist attractions and visitor sites

Visits to tourist attractions were 6.3% higher in 2012 than in 2011, and over a third (35%) were made by visitors from outside NI

Trends in Tourism in NI, GB and ROI

The combined number of GB and other overseas visitors to NI remained virtually unchanged (0%) between 2011 (1,561,000) and 2012 (1,554,000). This is broadly in line with the change in overseas visitor numbers to the Republic of Ireland (0%)² over the period. In contrast, overseas visitors to the UK as a whole increased by 1%³ in 2012, though this may reflect the impact of the Olympics and Paralympics.

While GB visitor numbers to NI fell by 2% between 2011 and 2012, GB visitors to the ROI fell by 4% over the same period⁴. Expenditure from overseas visitors in 2012 rose by 4% in NI, 4.5% in ROI and 4% in GB. Visit Britain has also reported that domestic tourism overnight trips within GB also fell by 1% in 2012, compared to 2011. Overseas visits by UK residents also remained unchanged between 2011 and 2012. Annual GDP growth in the UK was 0.2% in 2012, which may also help explain the absence of growth in tourist visits by GB and NI residents.

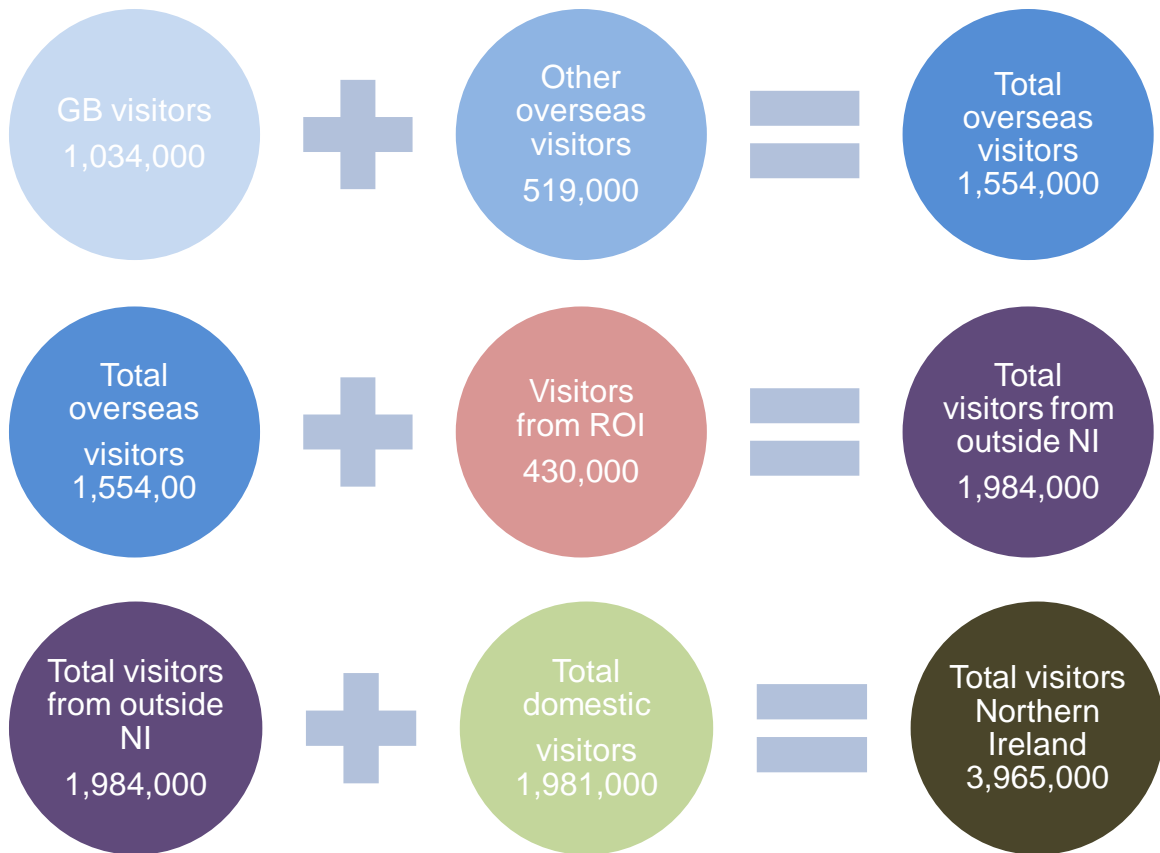
Despite visitor numbers (domestic and external) to NI being virtually unchanged between 2011 and 2012, total expenditure increased by 7% (£42 million) to £683 million.

² http://www.cso.ie/en/media/csoie/releasespublications/documents/tourismtravel/2012/tata_2012.pdf

³ <http://www.ons.gov.uk/ons/rel/ott/overseas-travel-and-tourism---monthly-release/december-2012/stb-monthly-overseas-travel-and-tourism--december-2012.html>

⁴ <http://www.cso.ie/en/media/csoie/releasespublications/documents/tourismtravel/2012/hotra2012.pdf>

Figure 2 Tourism demand NI 2012



Total Visitor Numbers Northern Ireland 2004-2012⁽¹⁾

Visitors (000s)	2004	2005	2006	2007	2008	2009	2010	2011	2012
GB and Overseas⁽²⁾⁽³⁾	1,733	1,699	1,702	1,785	1,709	1,443	1,426	1,561	1,554
Household Travel Survey (CSO)⁽⁴⁾	252	271	277	323	367	475	383	370	430
Total Visitors from outside Northern Ireland⁽⁵⁾	1,985	1,970	1,979	2,108	2,076	1,918	1,809	1,931	1,984
TNS (on behalf of NITB) Continuous Household Survey (NISRA)⁽⁶⁾	749	1,390	1,350	1,154	1,024	1,375	1,390	2,029	1,981
Total⁽⁵⁾	2,734	3,360	3,329	3,262	3,100	3,293	3,199	3,960	3,965

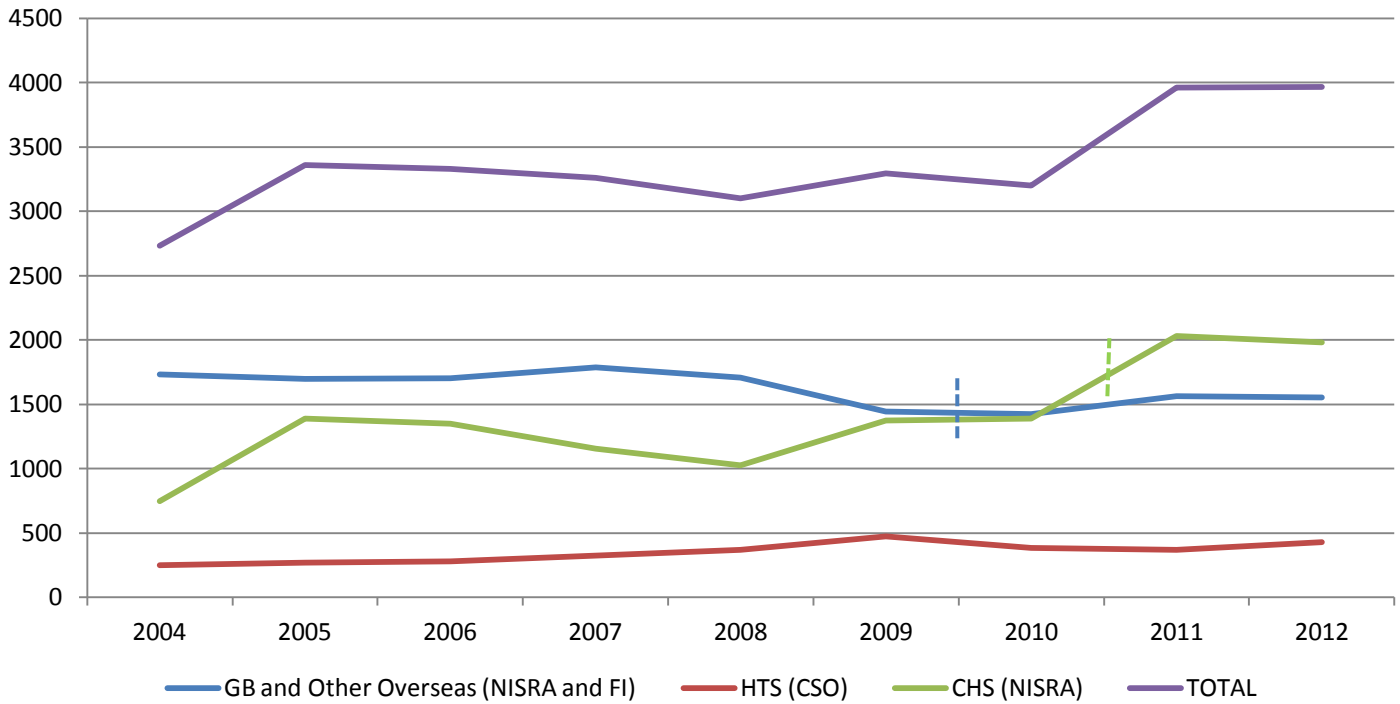
Abbreviations: NITB: Northern Ireland Tourist Board;
NISRA: Northern Ireland Statistics and Research Agency
CSO: Central Statistics Office, Republic of Ireland

Breaks in series: Responsibility for the collection of overseas visitor numbers transferred from NITB to NISRA in 2010 and therefore consistent comparisons cannot be made between overseas visitor estimates before and after this time point.
Responsibility for the collection of domestic visitor numbers transferred from NITB to NISRA in 2011 and therefore consistent comparisons cannot be made between domestic visitor estimates before and after this time point

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) with a sample size of 12,600 and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, with an achieved sample size of 300 (rounded to nearest 100) in 2012.
- 3) Figures for 2011 and those previously published for the 1st 3 quarters of 2012 have been revised (see background notes at end of this document for details). SOT figures are now based on a 3 year rolling average
- 4) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO – sample size 400 (rounded to nearest 100) in 2012). Figures for 2011 have been revised by CSO.
- 5) Figures may not add to totals due to rounding
- 6) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012

Total Visitor Numbers Northern Ireland 2004 - 2012



4. Visitors by Main Markets

4.1 All visitors – GB, other overseas, ROI and Domestic trips, nights and expenditure

• Overall trips to NI were virtually unchanged at 3,965,000 in 2012 compared to 3,960,000 in 2011 (Table 4). This figure includes visits by tourists from the Republic of Ireland (ROI), Great Britain (GB) and overseas as well as NI residents taking overnight trips within NI

• The number of nights spent in NI during those trips fell by 6%. However, tourist expenditure grew by 7% to an estimated £683m in 2012

Table 4 Estimated visitors (Thousands) to NI and associated expenditure (£m)⁽¹⁾ 2011, 2012

	Trips (000's)		Nights (000's)		Expenditure (£m)	
	2011	2012	2011	2012	2011	2012
GB visitors ⁽²⁾⁽³⁾	1052	1034	4898	4554	235	244
Overseas visitors ⁽²⁾⁽³⁾	509	519	3946	4150	168	174
Total Overseas⁽⁴⁾	1561	1554	8844	8704	404	418
ROI visitors ⁽⁵⁾	370	430	1148	1181	59	70
Total visitors from outside NI⁽⁴⁾	1931	1984	9992	9885	463	488
Domestic overnight trips ⁽⁶⁾ (NISRA official statistics)	2029	1981	4683	3856	177	195
Total⁽⁴⁾	3960	3965	14675	13741	640	683

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) with a sample size of 12,600 and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, with an achieved sample size of 300 (rounded to nearest 100) in 2012.
- 3) Figures for 2011 and those previously published for the 1st 3 quarters of 2012 have been revised (see background notes at end of this document for details). SOT figures are now based on a 3 year rolling average
- 4) Figures may not add to totals due to rounding
- 5) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO – sample size 400 (rounded to nearest 100) in 2012). Figures for 2011 have been revised.
- 6) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012

4.2 All visitors from outside Northern Ireland

This information is sourced from the Northern Ireland Passenger Survey (Northern Ireland official statistics), the Survey of Overseas Travellers (Fáilte Ireland) and the Household Travel Survey (Central Statistics Office, ROI).

All external visitors

- The total number of visitors from outside NI increased by 3% in 2012 compared to 2011.
- The biggest growth occurred in visitors coming to NI on holiday (100,000)
- However, there was a drop in the numbers of visitors coming to see friends and family (63,000)

GB visitors

- The number of GB visitors fell slightly (-2%) overall, with the biggest decline being in those coming to visit friends and family (-33,000) (Table 5).
- However, numbers of GB residents coming to NI on holiday increased by 7% in 2012.
- Overall expenditure by GB visitors rose by 4% between 2011 and 2012 (Table 1)
- The estimated increase in visitors from outside NI (3%) included:-
 - a. a 16% (+ 60,000) increase in visitors from the RoI (to 0.43 million)
 - b. a 2% (-18,000) fall in visitors from GB (to 1.03 million)
 - c. The number of other European visitors was unchanged over the year (253,000).
 - d. North American visitors increased by 1% (2,000) to 163,000
 - e. Visitors from other destinations increased by 9% (9,000) to 104,000

Overseas visitors

- Overall visitor numbers from North America and Europe were fairly stable between 2011 and 2012, while those from other overseas countries rose by 9% (9,000) (Table 5).
- Holiday visitor numbers increased, while numbers visiting friends and relatives fell in all markets apart from European, where this pattern was reversed
- There was an increase in numbers visiting for business purposes from North America (14%) but a fall in business visitors from Europe (-11%) and overseas markets (-28%).
- Expenditure by overseas visitors from outside GB grew by 4% in 2012.

Table 5 All visitors from outside NI (thousands)⁽¹⁾ Country of residence and reason for visit 2011, 2012

Country of Residence	Reason For Visit (000s)									
	Visiting friends / relatives		Holiday		Business		Other		Total ⁽²⁾	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
ROI ⁽²⁾	189	166	100	170	24	22	57	72	370	430
Great Britain ⁽³⁾⁽⁴⁾	618	585	181	194	213	219	40	36	1,052	1,034
Other European ⁽³⁾⁽⁴⁾	86	92	118	115	42	37	7	9	253	253
North American ⁽³⁾⁽⁴⁾	52	43	88	96	15	17	6	7	161	163
Other Overseas ⁽³⁾⁽⁴⁾	38	34	44	56	11	8	2	5	95	104
Total ⁽⁵⁾	983	920	531	631	305	303	112	129	1931	1984

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO – sample size 400 (rounded to nearest 100) in 2012). Figures for 2011 have been revised.
- 3) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) with a sample size of 12,600 and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, with an achieved sample size of 300 (rounded to nearest 100) in 2012.
- 4) Figures for 2011 and those previously published for the 1st 3 quarters of 2012 have been revised (see background notes at end of this document for details. SOT figures are now based on a 3 year rolling average
- 5) Figures may not add to totals due to rounding

More detailed information on overseas visitors and a description of NIPS and SOT survey methodology can be found at [Great Britain and Overseas Visitors to Northern Ireland 2012]

4.3 ROI residents staying overnight in NI

This information is sourced from the RoI's Central Statistics Office's Household Travel Survey (Visitors from the Republic of Ireland to Northern Ireland 2012)

- The number of visitors to NI from the Republic of Ireland increased to 430,000 in 2012 compared to 370,000 in 2011 (Tables 1,4).⁽³⁾
- Total nights spent by these visitors rose by 3% (Table 4), and overall spend by almost a fifth (19%) from an estimated £59m to £70m.
- As with overseas visitors, there was a decline in numbers coming to see friends and relatives (12%); and a rise in those coming for holiday purposes (69%).

Detailed results from the Household Travel Survey and a description of the survey methodology can be found at [Visitors from the Republic of Ireland to Northern Ireland 2012]

4.4 Trips taken by NI residents

This information is sourced from the CHS is considered Northern Ireland official statistics

- The number of overnight trips by NI residents within NI fell slightly (-2%) between 2011 and 2012 (Table 6)
- However, expenditure on domestic tourism rose by 10% from £177m to £195m
- The fall in number of trips was due to declining numbers of residents taking holiday/pleasure/leisure trips within NI (-15%)
- There was a change in the type of accommodation used on holiday/pleasure/leisure trips however, with more nights being spent in hotels, guesthouses and bed&breakfast accommodation and fewer with family/friends, in caravans or camping and other accommodation
- NI residents enjoyed an estimated 17% more leisure day trips (8.4m) within NI in 2012 than in 2011 (7.2m). Of these 2.4m were tourism day trips.

Detailed results for Domestic Tourism and a description of the survey methodology can be found at [Northern Ireland Domestic Tourism (January – December 2012)]

Table 6: Domestic Tourism
Overnight trips (thousands) taken by NI residents within NI
and associated expenditure (£m) by purpose of trip⁽¹⁾⁽²⁾ 2011, 2012

	Trips (000's)		Change over the year (%)	Expenditure (£m)		Change over the year (%)
	2011	2012		2011	2012	
Holiday, pleasure, leisure	1246	1060	-15	120	134	+12
Visiting friends and relatives	570	686	+20	34	36	+6
Other	214	235	+10	23	26	+13
<i>Total</i>	2029	1981	-2	177	195	+10

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012

- There was an increase in the total number of overnight trips taken by NI residents using hotels or motels for their accommodation in 2011 compared to 2012 (+11% trips and +9% nights), but a fall in total spend during these trips (-9%).

Table 7: 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) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012
- 3) Percentage change calculated using unrounded figures
- 4) Estimates based on a sample size of 30 or less appear shaded as
- 5) Estimates based on a sample size of 31 -50 appear shaded as

- There was also an increase in those using self-catering/ hostel/ university/ school/ holiday camps (+58% trips and +85% nights) but a fall also 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 spent in this type of accommodation but an increase in spend during these trips (+57%).

5. Accommodation Occupancy (NISRA)

- A total of 1,805,000 rooms and 2,798,000 bed-spaces were sold in Northern Ireland hotels from January to December 2012. This compares to 1,634,000 rooms and 2,570,000 bed-spaces sold in 2011.
- Hotel room and bed-space occupancy both increased when compared with 2011. Average hotel room occupancy in Northern Ireland for 2012 was 65% representing an increase of 7 percentage points from 2011. Bed-space occupancy in hotels grew by 4 percentage points to 45% when compared with 2011.
- A total of 369,000 rooms and 608,000 bed-spaces were sold in Northern Ireland guesthouses, guest accommodation and bed and breakfast establishments (GHBBs) between January and December 2012. This compares to 34,000 rooms and 550,000 bed-spaces sold in 2011.
- Average room occupancy for GHBBs was 33%, an increase of 4 percentage points, while bed-space occupancy was 23%, an increase of 2 percentage points when compared with 2011.
- During 2012, the unit occupancy for self-catering was 28%, similar to that of 2011 (27%).
- NI residents accounted for over half (58%) of all arrivals to self-catering in 2012.

Detailed results from the Occupancy and Self Catering Survey and a description of the survey methodology can be found at [Northern Ireland Hotel, Bed & Breakfast, Guesthouse and Self-Catering Occupancy Survey (January – December 2012)]

Table7: Room and bed-space occupancy rates Northern Ireland 2011, 2012

	2011		2012	
	Room (%)	Bed-space (%)	Room (%)	Bed-space (%)
Hotels ⁽¹⁾	59	41	65	45
Guesthouses and B&Bs ⁽¹⁾⁽³⁾	29	21	33	23
Self-catering establishments ⁽²⁾⁽³⁾		Unit (%)		Unit (%)
		27		28

Notes:

- 1) *Figures are derived from the monthly census of hotels and sample of guest houses and bed and breakfast establishments conducted by NISRA with an achieved average sample size of 62 for hotels and 114 for guest houses and bed and breakfast establishments and an average response rate of 45% for hotels and 30% for guest houses and bed and breakfast establishments*
- 2) *Figures are derived from the annual survey of self catering establishments conducted by NISRA with an achieved sample size of 400 and a response rate of 28%*
- 3) *Estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes*

5.1 Occupancy by region of NI (NISRA)

Hotels

- During January - December 2012, hotels in Belfast & Castlereagh area experienced the highest rates in room and bed-space occupancy (75% and 54% respectively)
- Hotels in the Mid West experienced the lowest room and bed-space occupancy rates (46% and 30%).
- Hotels in the South West experienced the largest increase in room occupancy (+10 percentage points).
- Hotels in Belfast & Castlereagh experienced an increase of 9 percentage points in room occupancy and 8 percentage points in bed-space occupancy when compared to the same period in 2011.

- The North West and Mid West each experienced a decrease of 2 percentage points in hotel bed-space occupancy. (Table 8)

Table 8 Hotel room and bed-space occupancy rates by Geographical region, January - December 2011/2012

Geographical Location	2011		2012		Change ¹ 2011/2012	
	Room %	Bed-Space %	Room %	Bed-Space %	Room (pps)	Bed-Space (pps)
All Hotels	59%	41%	65%	45%	+7	+4
North West	63%	43%	63%	41%	+1	-2
Mid West	47%	32%	46%	30%	-1	-2
South West	55%	43%	65%	46%	+10	+3
North East	52%	34%	57%	38%	+5	+3
South East	51%	39%	53%	41%	+2	+2
Belfast and Castlereagh	65%	46%	75%	54%	+9	+8
Mid East	49%	33%	53%	33%	+4	0

Note (1) Percentage change calculated using unrounded figures

Bed & Breakfasts, Guesthouses and Guest Accommodation

- During January - December 2012, Guesthouses and Bed & Breakfasts in the North East experienced the highest room occupancy of 35%.
- The Mid West experienced the lowest room occupancy of 20%, although this was an increase of 6 percentage points on the same period in 2011. (Table 9)

Table 9 Bed & Breakfasts and Guesthouse room and bed-space occupancy rates by Geographical region, January - December 2011/2012

Geographical Location	2011		2012		Change ¹ 2011/2012	
	Room %	Bed-Space %	Room %	Bed-Space %	Room %	Bed-Space %
All GH's and B&B's	29%	21%	33%	23%	+4	+2
North West	30%	20%	25%	17%	-5	-2
Mid West	14%	11%	20%	15%	+6	+4
South West	36%	26%	34%	23%	-2	-3
North East	32%	24%	35%	24%	+2	+0
South East	22%	16%	24%	18%	+2	+2
Belfast and Castlereagh ²	*	*	*	*	*	*
Mid East	25%	17%	30%	22%	+5	+4

Note (1) Percentage change calculated using unrounded figures

(2) * Sample size too small to provide a reliable estimate

- The Mid West experienced the largest increases in room occupancy and bed-space occupancy of +6 and +4 percentage points respectively.
- The North West experienced the largest decreases of -5 percentage points in room occupancy and -2 percentage points in bed-space occupancy. (Table 9)

6. Visitor Attraction Survey (NISRA)

Figures for participating visitor attractions show that:

- Approximately 12.8 million visits were made during 2012
- There was a 6.3% increase in the number of visitors to attractions from 2011 to 2012
- Country parks/parks/forests/gardens accounted for more than a third of visitors in 2012 (37%)
- When country parks/parks/forests/gardens were excluded, the most popular visitor attraction in NI in 2012 was Titanic, Belfast (665,000 visitors).
- Just over a third (35%) of all visits in 2012 were made by visitors from outside Northern Ireland

Table 10: Top 10 participating visitor attractions (excluding country parks/parks/forests/gardens) ⁽¹⁾ 2011, 2012

	Attraction	Visitor Numbers (000s)		
		2011	2012	% change
1	Titanic Belfast ⁽²⁾	n/a	665	n/a
2	Ulster Museum	471	595	+26
3	Giant's Causeway V. Centre ⁽³⁾	533	531	-2
4	Dundonald Ice Bowl	601	459	-24
5	W5	251	328	+31
6	Oxford Island Nature Reserve	319	297	-7
7	Derry Walls	278	281	+1
8	Carrick-A-Rede Rope Bridge	243	276	+14
9	Belfast Zoo	283	259	-8
10	Pickie Fun Park ⁽⁴⁾	n/a	245	n/a

Notes: 1) Some respondents wished their visitor numbers to remain confidential and these attractions have been excluded from this table

2) Opened for the first time March 2012

3) Opened for the first time July 2012

4) Re-opened in 2012 after refurbishment

Table 11: Top 10 participating country parks/parks/forests/gardens 2012⁽¹⁾

	Country Parks/Gardens	Visitor Numbers (000s)		% change
		2011	2012	
1	Lagan Valley Regional Park ⁽²⁾	1,081	1,088	+1
2	Peace Bridge ⁽³⁾	334	917	n/a
3	Crawfordsburn Country Park	770	800	+4
4	Botanic Gardens	650	650	0
5	Delamont Country Park	577	577	0
6	Roe Valley Country Park	280	250	-11
7	Castle Archdale Country Park	180	200	+11
8	Carnfunnock Country Park	231	194	-16
9	Scrabo Country Park	200	180	-10
10	Dungannon Park	125	142	+14

Notes: (1) Some respondents wished their visitor numbers to remain confidential and these attractions have been excluded from this table

(2) Lagan Valley Regional Park incorporating Lagan Towpath

(3) The Peace Bridge has been re-categorised for the purposes of the 2012 Visitor Attraction Survey. No percentage change has been given as the Peace Bridge first opened in June 2011 and therefore the 2011/2012 figures are not comparable.

Detailed results from the Visitor Attraction Survey and a description of the survey methodology can be found at [Northern Ireland Visitor Attraction Survey (January – December 2012)]

7.1 Other sources

Tourism and Leisure employee jobs (NISRA)

At December 2012, the Quarterly Employment Survey (QES) estimated that tourism and leisure industries accounted for 54,270 employee jobs in NI, 8% of all employee jobs. This proportion was unchanged from that reported in December 2011⁵, when tourism and leisure accounted for 53,670 employee jobs in NI.

Cruise ships

Information on cruise ship visitors is not directly collected by NISRA. However:

- Derry Visitor and Convention Bureau report that 8 cruise ships with an associated 4,299 passengers visited Derry between January and December 2012.
- According to the Belfast Visitor & Convention Bureau, there were 45 cruise ships to Belfast in 2012 with 80,000 passengers and crew onboard.

It is important to note that passengers and crew on board a cruise ship may not all disembark at any particular port, and no estimates are available of the numbers who do so. However, should such visitors attend any of the attractions featured in this report, they will be included in the count for these attractions.

5

Northern Ireland Quarterly Employment Survey December 2012, published 20/03/2013, Northern Ireland Quarterly Employment Survey December 2011, published 14/03/2012

The Tourism and Leisure sector has been derived from the UK Standard Industrial Classification of Economic Activities (SIC 2007) and comprises:

Accommodation; Food and beverage service activities (excluding event catering and other food service activities); Travel agency, tour operator and other reservation service and related activities; Libraries, archives, museums and other cultural activities; Gambling and betting activities; Sports activities and amusement and recreation activities

8. Background Notes

Trends in tourism can be tracked in a variety of ways. Demand can be assessed through visitor numbers, trips, and levels of expenditure. Supply is measured using data on available rooms and bed spaces as well as occupancy levels of tourist accommodation. Other information such as attendance at visitor attractions can also be useful in rounding out the overall picture of tourist activity.

This bulletin presents a summary of available information for Northern Ireland (NI) in 2012. The data is derived from a number of sources, not all of which are the direct responsibility of NISRA. For example, some GB and overseas visitors to NI leave through RoI airports and ports (an estimated 28% in 2012), and NISRA receives information on such visitors from Fáilte Ireland. Similarly, the Central Statistics Office (CSO, (RoI)) provides summary statistics to NISRA on the number of RoI residents who visit NI. It is important that users appreciate that the robustness of estimates from some of the sources are limited by survey sample sizes. Confidence intervals relating to key estimates are provided for NISRA surveys, as is information on the sample size underpinning the RoI sources, for this purpose. Further information on the survey methodology can be found at:-

http://www.detini.gov.uk/northern_ireland_official_tourism_statistics_methodology_and_proposed_development_appendix_-_detailed_methodology.pdf

Code of Practice

The production of those tourism statistics for which NISRA is responsible is conducted in line with the principles of the Official Statistics Code of Practice <http://www.statisticsauthority.gov.uk/assessment/code-of-practice/code-of-practice-for-official-statistics.pdf>. These principles require that NISRA produces official statistics to meet the requirements of informed decision making by government, public services, business, researchers and the public. They include an obligation to produce statistics impartially and objectively, using sound methods and assured quality to meet user needs. The code makes clear that at all stages in the production and dissemination of official statistics, the public interest should prevail over organisational, political or personal interests.

Sources

Information on tourism demand is collated as follows (Figure 1 overleaf):

1. Data on overseas visitors leaving through a NI airport or sea terminal is collected through the NI Passenger Survey (NIPS), conducted by the Northern Ireland Statistics and Research Agency (NISRA). Departing visitors are asked a number of questions including their country of residence, number of nights stayed in Northern Ireland, type of accommodation used and reason for visit, as well as expenditure throughout the trip.

2. Information on overseas visitors exiting through the Republic of Ireland (ROI), an important gateway to NI, is collected through the Survey of Overseas Travellers, conducted by Fáilte Ireland. Passengers are interviewed at ROI ports and terminals and those who have stayed for one or more nights in NI are asked for similar, though slightly less detailed, information to that collected through NIPS.
3. Information on ROI visitors to NI is gathered via the Household Travel Survey, a postal survey issued monthly by the Central Statistics Office, ROI.
4. Domestic tourism, the final element in the estimation of visitor numbers, is collected by NISRA through the Continuous Household Survey. This face to face survey of NI households includes detailed questions on overnight and day trips taken within NI during the previous month.

Information on Tourism supply in NI (Figure 2) is measured through:

1. A monthly census of hotel occupancy levels and monthly survey of occupancy levels in guesthouses, bed and breakfasts and other guest accommodation, both carried out by NISRA.
2. An annual survey of self-catering holiday accommodation (NISRA).
3. An annual collection of information on attendance at visitor attraction sites (NISRA).

Data Quality

The estimates produced 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. It is important to note therefore that some trends observed in this bulletin may be attributable to sampling error particularly where the numbers in the cells are small. The achieved sample sizes for each of the sources used for this bulletin are as follows:

Table 12 Sample sizes and response rates

	Achieved sample	Response rate
Northern Ireland Passenger Survey 2012	12,600	61%
Continuous Household Survey 2011/12	3,965) 400 ⁽¹⁾	70%
2012/13	3,954) overnight trips	69%
Survey of Overseas Travellers	300 ⁽¹⁾ visiting NI	NA
Household Travel Survey	400 ⁽¹⁾ visiting NI	45%
Occupancy survey	Average 62 hotels, 114 GHBBs)	Average 45% hotels, 30% (Monthly average) GHBBs
Self-catering	400 units	28%
Visitor attraction survey	147 attractions	38%

Note: (1) Rounded to nearest 100

Due to the nature of the sample design, confidence intervals cannot be derived for estimates from the Survey of Overseas Travellers or the Visitor Attraction Survey. None are currently available for CSO's Household Travel Survey. Confidence limits relating to a selection of estimates contained in this bulletin at the 95% confidence interval are shown below:

Table 13 Confidence Intervals Northern Ireland Continuous Household Survey

		95% confidence interval
Trips taken by NI residents	Trips to NI	+/-14
	Expenditure in NI	+/-20
	Trips to other countries	+/-10
	Expenditure in other countries	+/-16

Table 14 Confidence intervals for GB and other overseas visitor estimates by country of residence 2012 (Northern Ireland Passenger Survey).

Country of Residence	95 % Confidence Interval			
	Visitors	Year on year % change	Expenditure	Year on year % change
Total	+/-5%	+/- 7%	+/- 8%	+/- 10%
Great Britain	+/- 6%	+/- 8%	+/- 8%	+/- 11%
Other Europe	+/- 11%	+/- 13%	+/- 17%	+/- 20%
North America	+/- 9%	+/- 16%	+/- 25%	+/- 50%
Other Overseas	+/- 16%	+/- 15%	+/- 34%	+/- 48%

9. Revisions Policy

Revisions Policy

This bulletin includes revised estimates for overseas visitors to NI in 2011 and 2012. Previous estimates of visitors existing Northern Ireland ports and airports in 2011 and 2012 have been revised due to the need to correct the weighting procedures used in those years. The effect of the revision and additional data for the three months October to December is that the previously published estimates of a 3% decline for the period January to September 2012 compared with January to September 2011 has been revised to a 1% decline for the whole year 2012 compared to 2011.

The estimate of visitors to exit RoI ports and airports has also been reviewed. This component source from Failte Ireland's Survey of Travellers underwent a reduction in sample size in 2011 and 2012. The original results exhibited significant volatility between individual years and were the primary factor driving the previously reported decline (12%) in total overseas visitor numbers to NI in the first three quarters of 2012. It was expected that an alternative more robust measure would be available for potential use for 2012 from the RoI Passenger Card Inquiry. However, quality assurance of these estimates has not yet been completed by the CSO. In the absence of suitable alternative sources, single year data for 2011 and 2012 from the Survey of Travellers has been replaced with three year rolling averages - a standard statistical approach for dealing with volatility.

The resultant figures have smoothed the marked single year increase previously shown in the SOTs from 2010 to 2011 and the marked single year decrease from 2011 to 2012. The revised SOT figures indicate that there was estimated to be a slight increase (0.5%) in NI visitors departing through the RoI in 2012, compared to 2011. The overall effect of the revisions was that there was estimated to be no change (0%) in total overseas visitor numbers (i.e. from the NIPS and SOTs together) between 2011 and 2012. Tourism Statistics Branch revisions policy can be found at [Tourism Statistics Branch Revisions Policy]

Time series by Data source

This bulletin examines changes occurring between 2011 and 2012. A historical time series of headline figures is included below (Table 15, and Figure 1)

Table 15 Total Visitor Numbers Northern Ireland 2004-2012⁽¹⁾

Visitors (000s)	2004	2005	2006	2007	2008	2009	2010	2011	2012
NITB Northern Ireland Passenger Survey (NISRA)⁽²⁾ Survey of Overseas Travellers (Failte Ireland)⁽³⁾	1,429	1,385	1,339	1,351	1,278	1,068	1,028	1,122	1,113
Total Overseas⁽⁴⁾	1,733	1,699	1,702	1,785	1,709	1,443	1,426	1,561	1,554
Household Travel Survey (CSO)⁽⁵⁾	252	271	277	323	367	475	383	370	430
Total Visitors from outside Northern Ireland⁽⁴⁾	1,985	1,970	1,979	2,108	2,076	1,918	1,809	1,931	1,984
TNS (on behalf of NITB) Continuous Household Survey (NISRA)⁽⁶⁾	749	1,390	1,350	1,154	1,024	1,375	1,390	2,029	1,981
Total⁽⁴⁾	2,734	3,360	3,329	3,262	3,100	3,293	3,199	3,960	3,965

Abbreviations: NITB: Northern Ireland Tourist Board;
NISRA: Northern Ireland Statistics and Research Agency
CSO: Central Statistics Office, Republic of Ireland

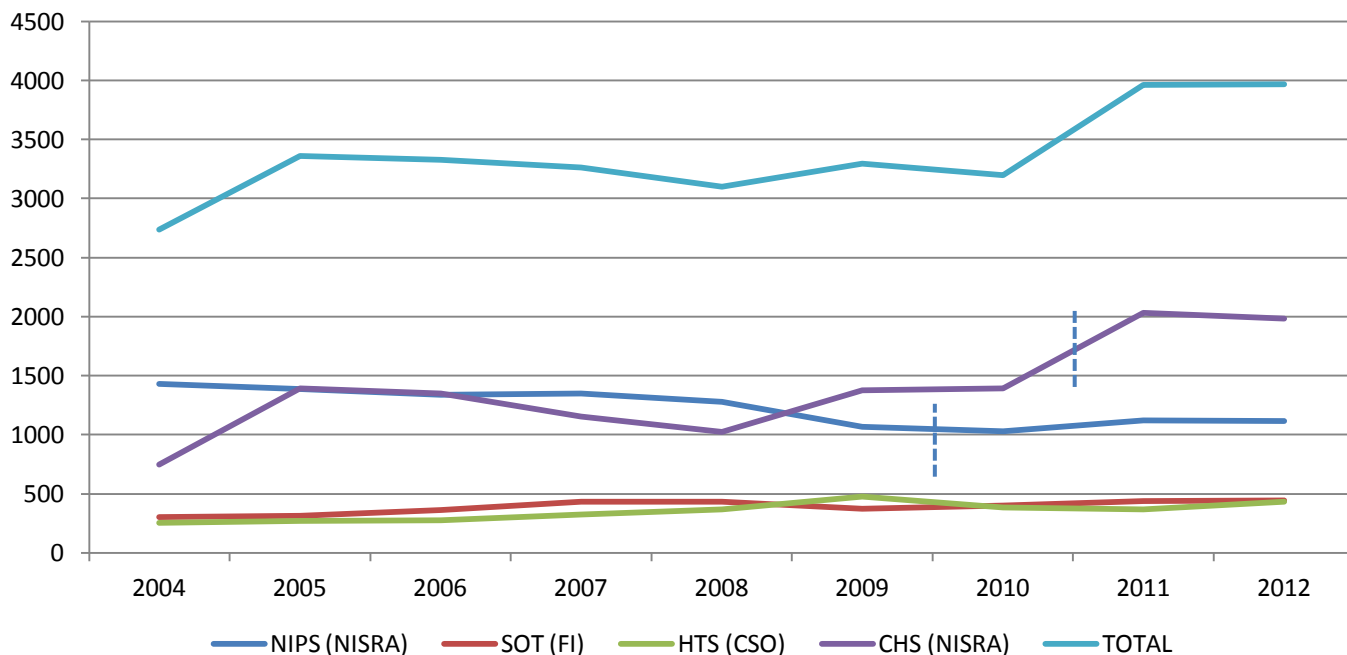
Breaks in series: Responsibility for the collection of overseas visitor numbers transferred from NITB to NISRA in 2010 and therefore consistent comparisons cannot be made between overseas visitor estimates before and after this time point.

Responsibility for the collection of domestic visitor numbers transferred from NITB to NISRA in 2011 and therefore consistent comparisons cannot be made between domestic visitor estimates before and after this time point

Notes:

- 1) All estimates are based on sample surveys and therefore have an associated degree of sampling error. Information on confidence intervals where these are available and sample sizes are provided in the background notes
- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) with a sample size of 12,600 in 2012. Figures for 2011 and those previously published for the 1st 3 quarters of 2012 have been revised (see background notes at end of this document for details).
- 3) Figures derived from the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, with an achieved sample size of 300 (rounded to nearest 100) in 2012. Figures for 2011 and 2012 have been revised with SOT figures now based on a 3 year rolling average
- 4) Figures may not add to totals due to rounding
- 5) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO – sample size 400 (rounded to nearest 100) in 2012). Figures for 2011 have been revised.
- 6) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA with an achieved sample size of 3,954 and 400 (rounded to nearest 100) overnight trips in 2012

Figure 1. Total Visitor Numbers Northern Ireland 2004 - 2012



A review of the methodology of NI tourism statistics has recently been completed (see [Tourism Statistics - User Consultation Summary Paper](#) and [Tourism Statistics - User Consultation Main Paper](#)). A detailed description of the methodology of each of the data collection tools described above was included in the Annex to the review document ([Tourism Statistics - User Consultation Methodology Paper](#)). User views are now being considered.

10. Data Sources

Figure 2 Tourism demand by data source

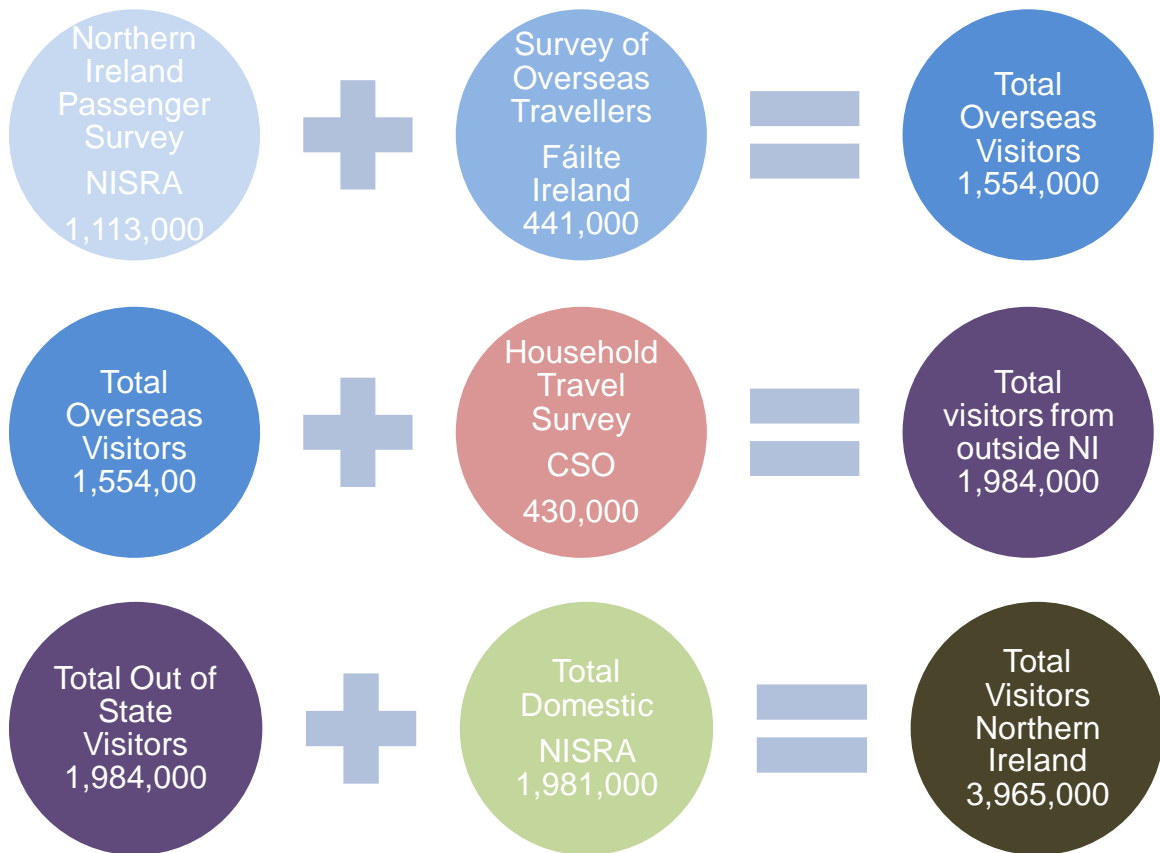


Figure 3 Tourism Supply

