

Overview of People Movement, Migration and Transport in Northern Ireland

5th May 2020

Outline

These slides provide an analysis of the population living in Northern Ireland with specific reference to the movement of people between Northern Ireland, Ireland and Great Britain.

- Movements of people between Northern Ireland and Great Britain / Ireland are extensive. People make journeys for a wide variety of reasons including to work, study, shop, tourism, or visit friends and family.
- Migration refers to the movement of people who live outside Northern Ireland (Great Britain, Ireland and the Rest of the World) who come to Northern Ireland with the intention of staying here for one year or more.

People movement does not refer to the number of unique individuals. One individual person could contribute to multiple people movements.

Please note that estimates throughout this report may not sum due to rounding.

The following table provides information on the different area groupings used in this report:

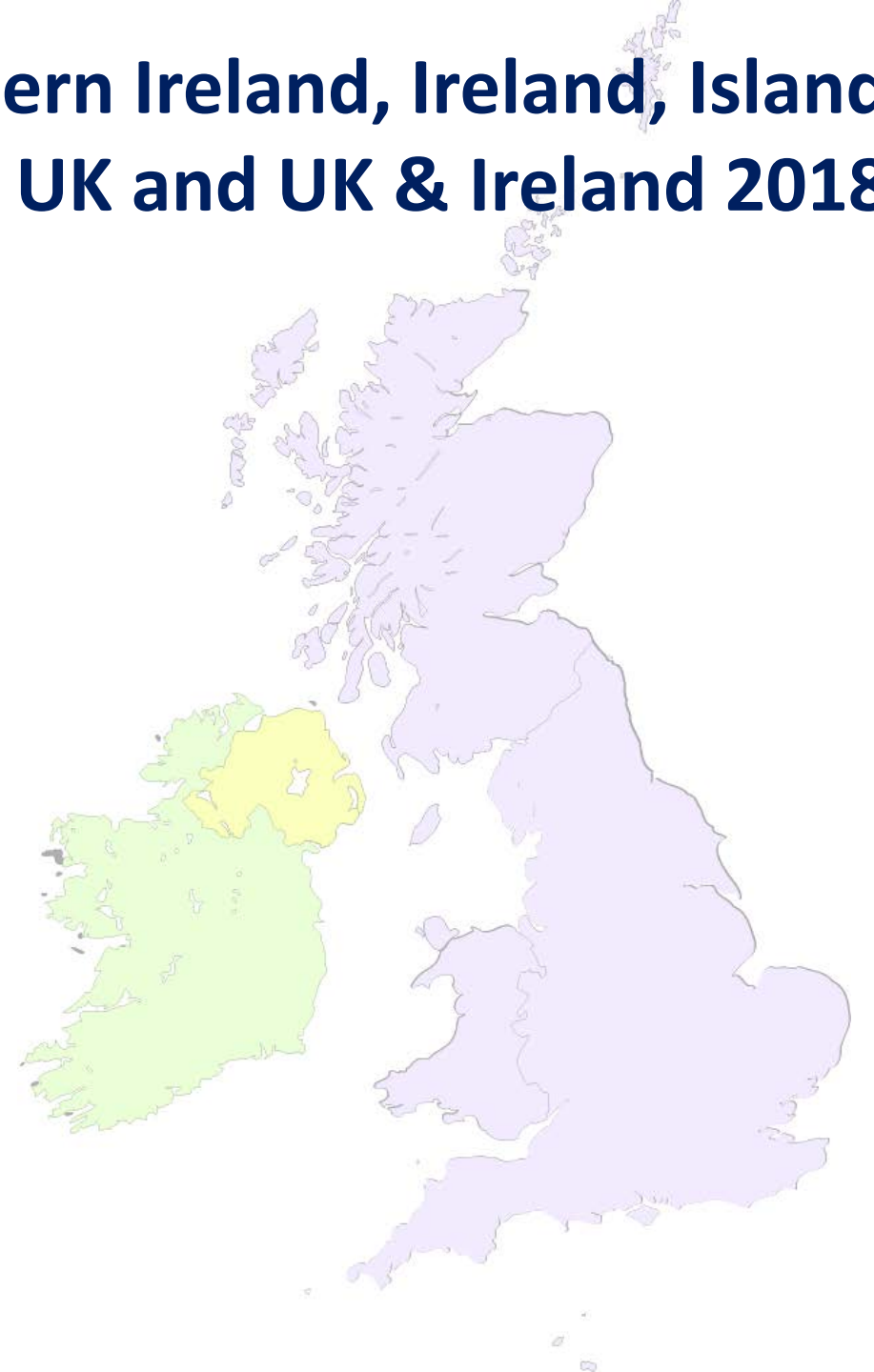
Area Grouping	
NI	Northern Ireland
GB	Great Britain
UK	Great Britain, Northern Ireland
IE	Ireland
EU26	Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden
EU27	EU26, Ireland
EU	EU27, UK

Note: Whilst the extent of the EU has changed over time, the definition of EU26 above has been taken throughout this report

Movement of People

Population of Northern Ireland, Ireland, Island of Ireland, Great Britain, UK and UK & Ireland 2018

	Population
Northern Ireland	1,881,600
Ireland	4,921,500
<i>Island of Ireland</i>	<i>6,803,100</i>
Great Britain	64,553,900
<i>UK</i>	<i>66,435,600</i>
<i>UK & Ireland</i>	<i>71,357,000</i>



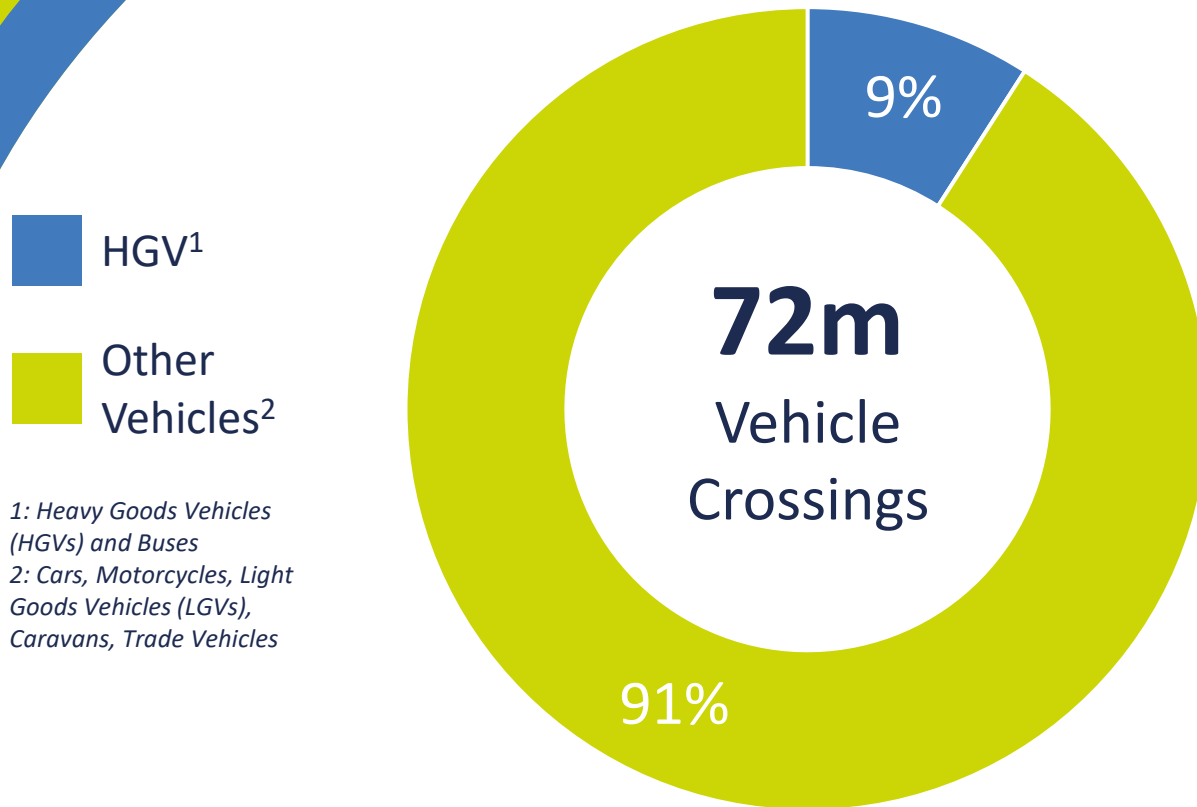
[2018 Mid Year Population Estimates for Northern Ireland \(as at 30 June 2018\), NISRA](#)

[Ireland Population and Migration Estimates, 2019 \(as at April 2019\), CSO](#)

[Population Estimates for UK, GB: mid-2018 \(as at 26 June 2019\), ONS](#)

NI↔IE border - 72 million vehicle crossings per annum

NI↔IE Border: Vehicle Crossings by Type 2016

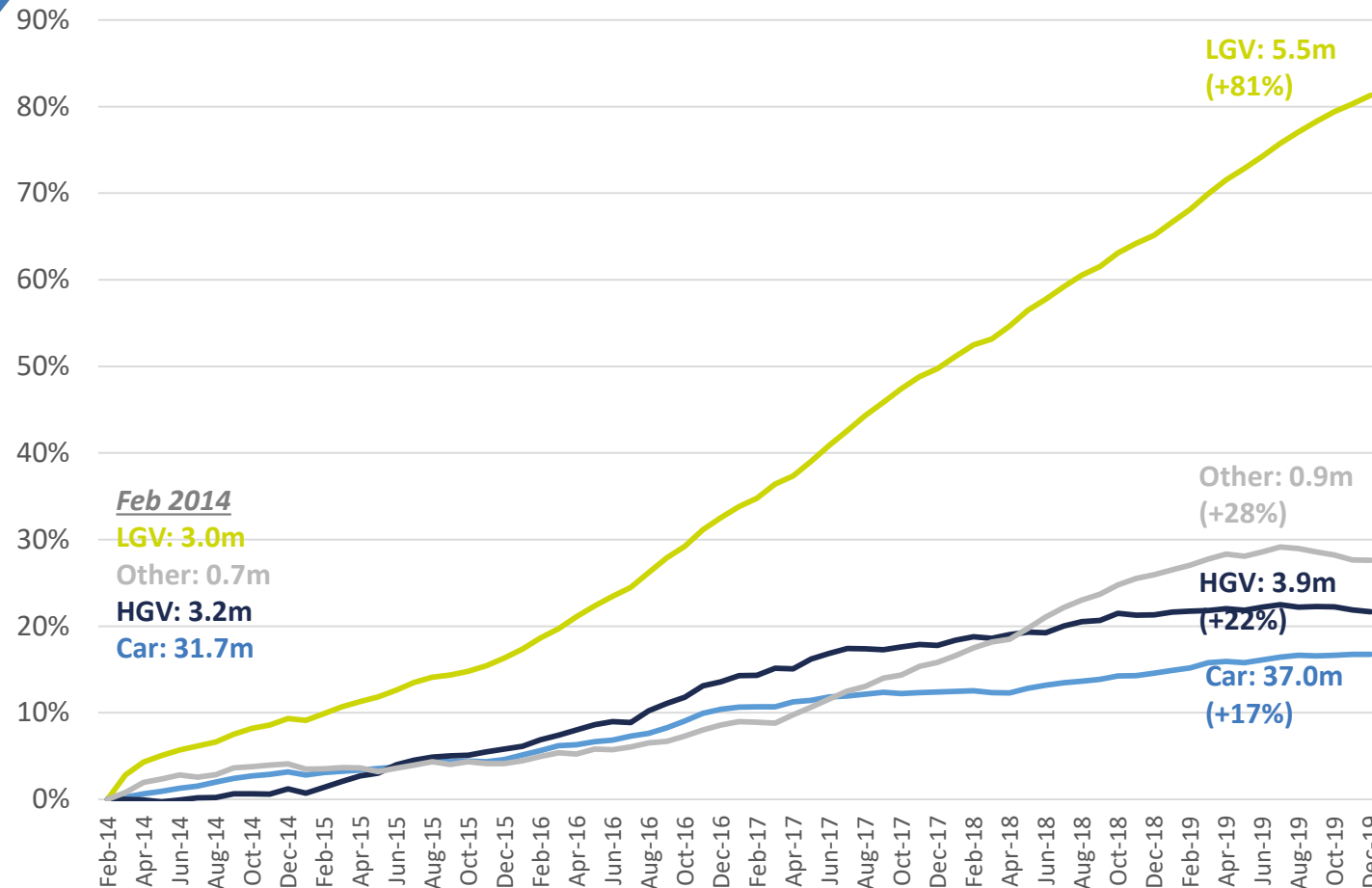


An estimated 72 million NI↔IE border vehicle crossings per annum. Of these:

- 66 million (91%) were classed as Other Vehicles - cars, motorcycles, light goods vehicles (LGVs) and caravans, etc...
- 6.4 million (9%) were classed as heavy goods vehicles (HGVs) (including buses)

NI↔IE border – 81% increase in LGV crossings from 2014

Percentage Change of NI↔IE Border Vehicle Crossings by Type
(rolling twelve months from February 2014 to December 2019)

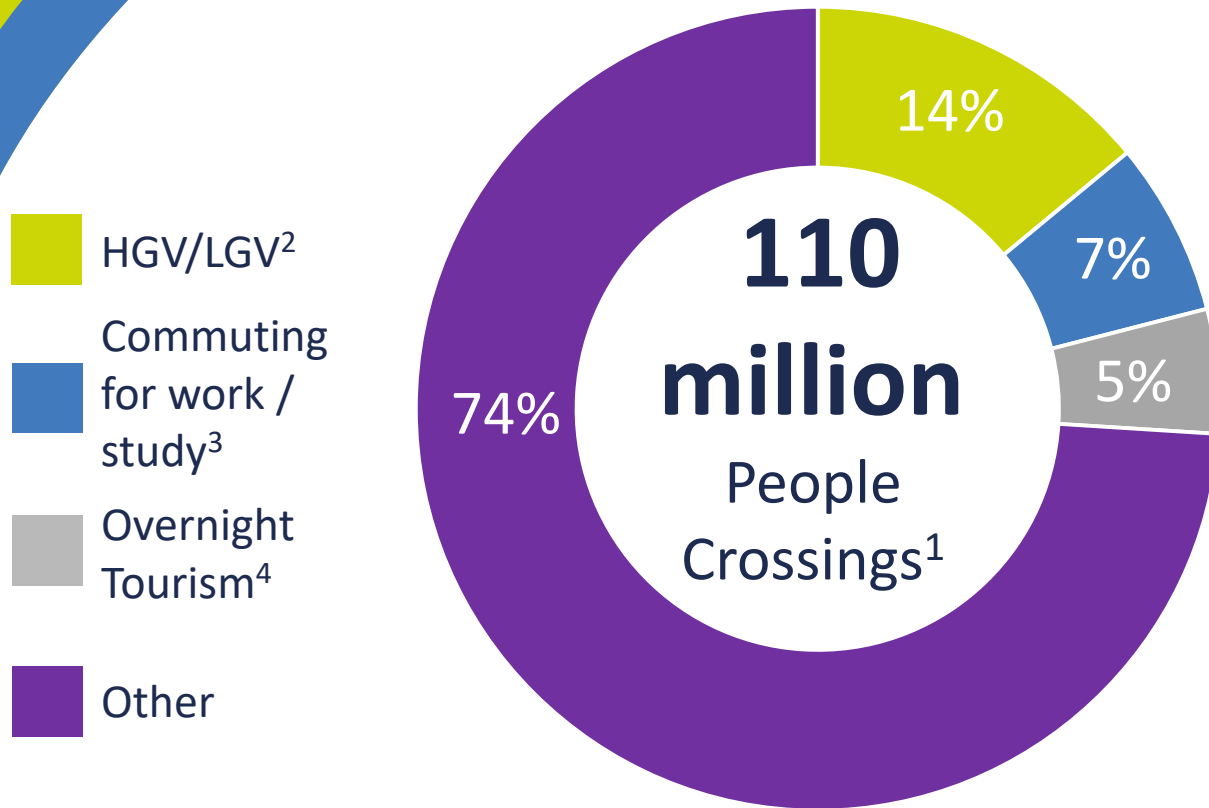


Traffic counts at 15 NI↔IE border locations from February 2014 to December 2019 show:

- 81% increase in LGV crossings from 3.0 million to 5.5 million
- 22% increase in HGV crossings from 3.2 million to 3.9 million
- 17% increase in car crossings from 31.7 million to 37.0 million
- 28% increase in other vehicle crossings from 0.7 million to 0.9 million

NI↔IE border – 110 million people crossings per annum

NI↔IE Border - People Crossings by Purpose 2016*



- 14% were in HGVs / LGVs
- 7% of people regularly commute across the border for work and study
- 5% were for overnight tourism trips
- 74% were classed as other, which may include:
 - Other business purposes
 - Visiting friends and relatives
 - Shopping
 - Medical treatment
 - Tourism day trips
 - Further travel (e.g. to get to an airport)
 - Other reasons

*Traffic counters are located at the 15 Principal Northern Ireland-Ireland crossing points

**Breakdown is an estimate based on other sources applied to the DfI Transport Model

1: Department for Infrastructure (DfI) Transport Model

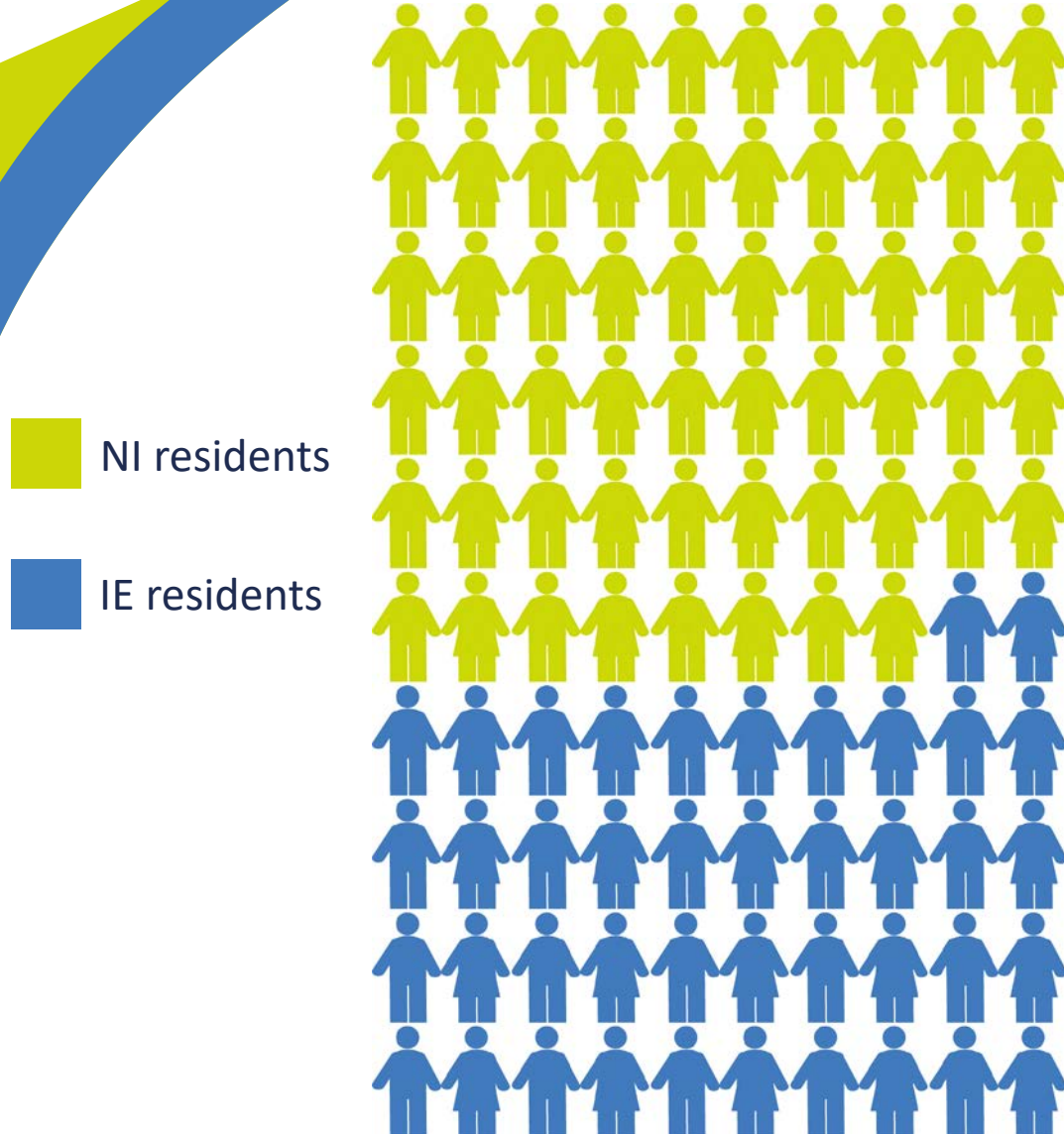
2: DfI Transport Model using vehicle classification mix from the 15 border crossing points on [Transport Infrastructure Ireland](#)

3: Censuses of Northern Ireland and Ireland 2011

4: [External Overnight Trips to Northern Ireland 2017](#), NISRA; [Visitor Facts and Figures 2017](#), Tourism Ireland

58% of total people crossings were by NI residents

NI↔IE Border - People Crossings by Origin

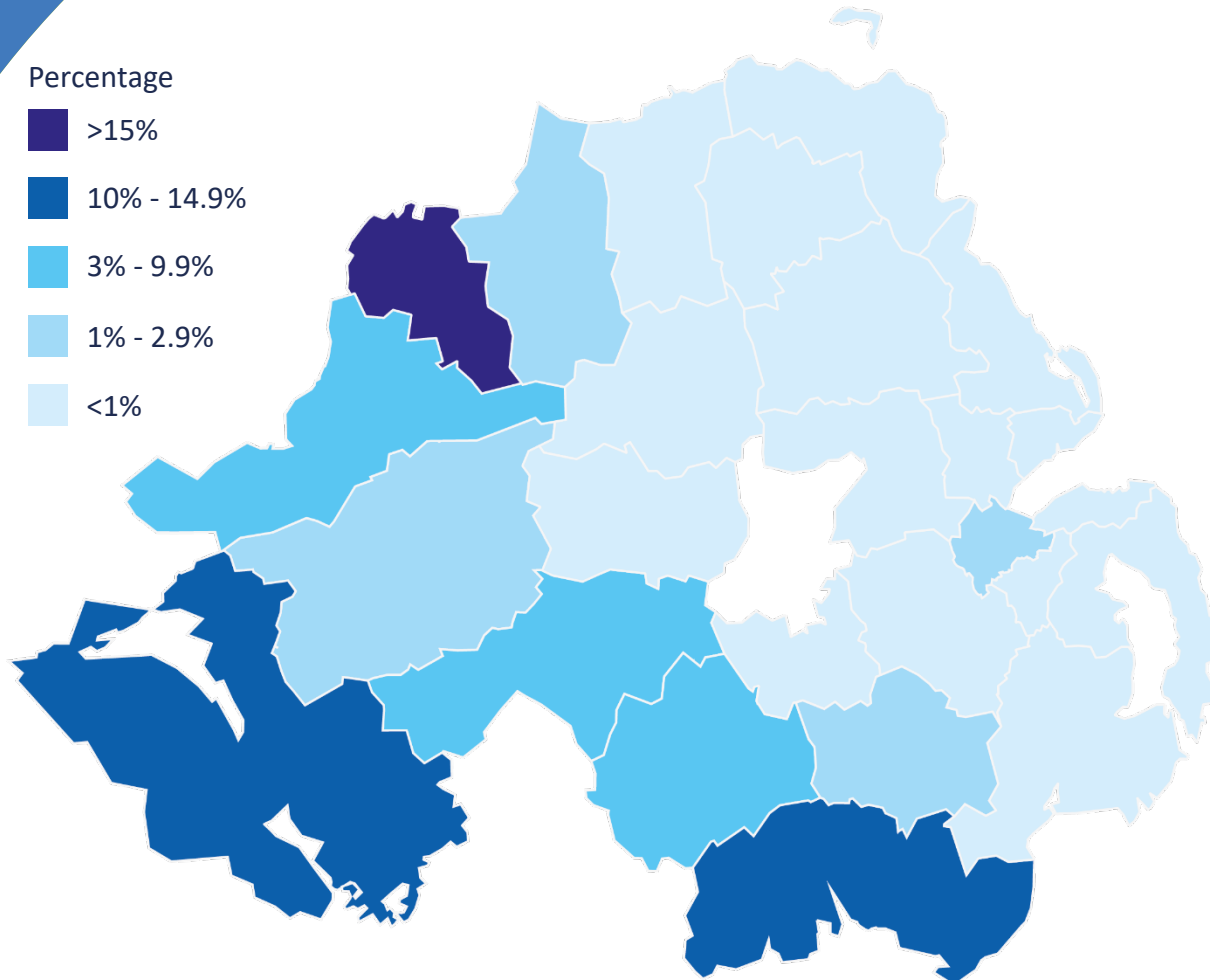


Mobile Network Operator (MNO) analysis of aggregate movements of people across the NI↔IE border estimates that:

- 58% of total crossings were by NI residents
- 72% of crossings were on weekdays
- 322,000 unique NI residents made cross border trips (during study period of 4 weeks in October 2017)
 - This equates to 17% of the NI population
 - On average NI residents made 1.8 return trips each week

Over 80% of border crossings by NI residents started in border council areas

Map 1: Origin of NI residents' border crossings to IE (%)
(average weekday)



- Map 1 shows that border council areas have on average a higher number of border people crossings
- 88% of NI residents' border crossings originated in those council areas on the border
 - 36% in Derry district council
 - 15% in Fermanagh district council
 - 14% in Newry & Mourne district council

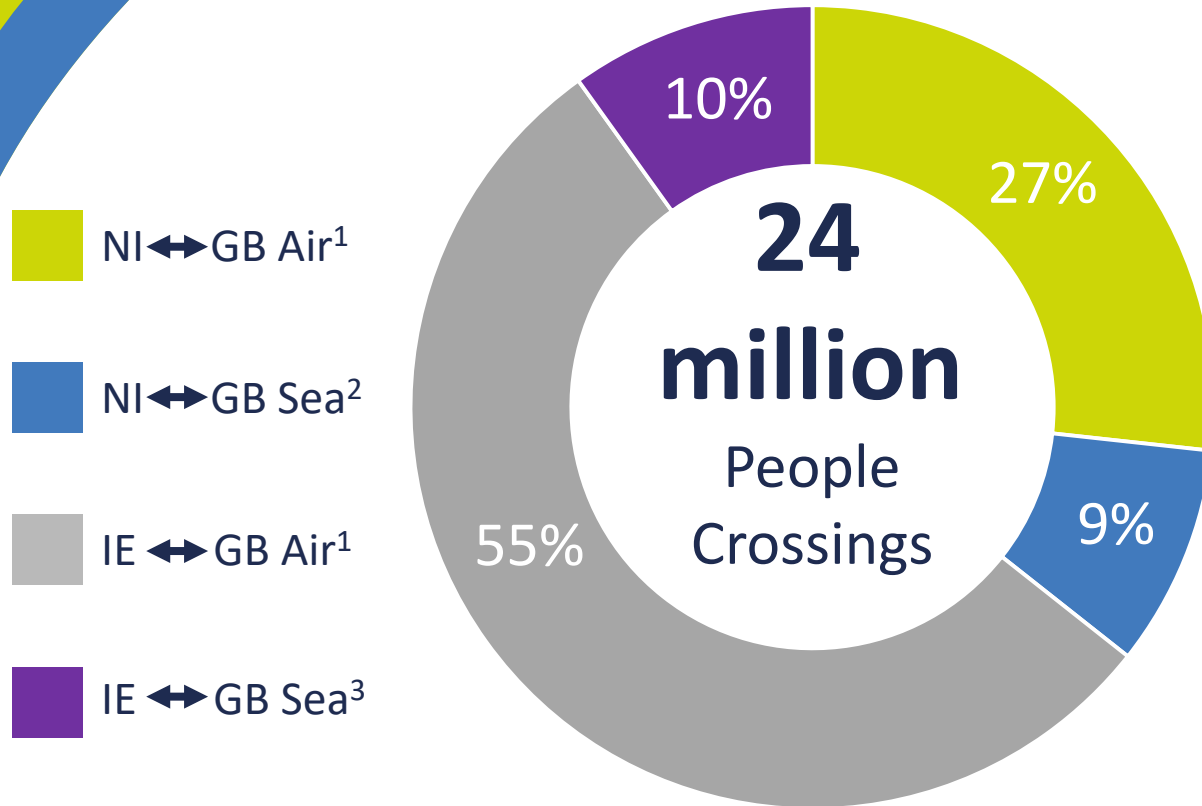
People who live close to the border make seven times more crossings than those who live further from the border

Using anonymised information from a Mobile Network Operator it was estimated that:

- 17% of the NI population made a cross border trip over the study period (4 weeks in October 2017)
- People living closest to the border account for the vast majority of cross border trips, making almost 3 cross border trips per week
- People are more likely to cross the border for social and leisure purposes than work, with almost two thirds of trips made for social and leisure purposes
- 86% of crossings made by NI residents in cars and light good vehicles ended in destinations next to the border
- The main destinations for HGVs crossings to ROI were Dublin, the South East and Dundalk, which accounted for almost half of all crossings at 47%

24 million people crossings over the Irish Sea (IE/NI↔GB) per annum

Irish Sea - People Crossings by Route 2018



- During 2018, there were 8.5 million (36%) Irish Sea people crossings using Northern Ireland airports and Northern Ireland sea-ports; of these:
 - 6.5 million (27%) used NI airports
 - 2.1 million (9%) used NI sea-ports
- In 2018, there were 15.3 million (65%) Irish Sea people crossings using Ireland air and Ireland sea-ports; of these:
 - 13.0 million (55%) used IE airports
 - 2.3 million (10%) used IE sea-ports

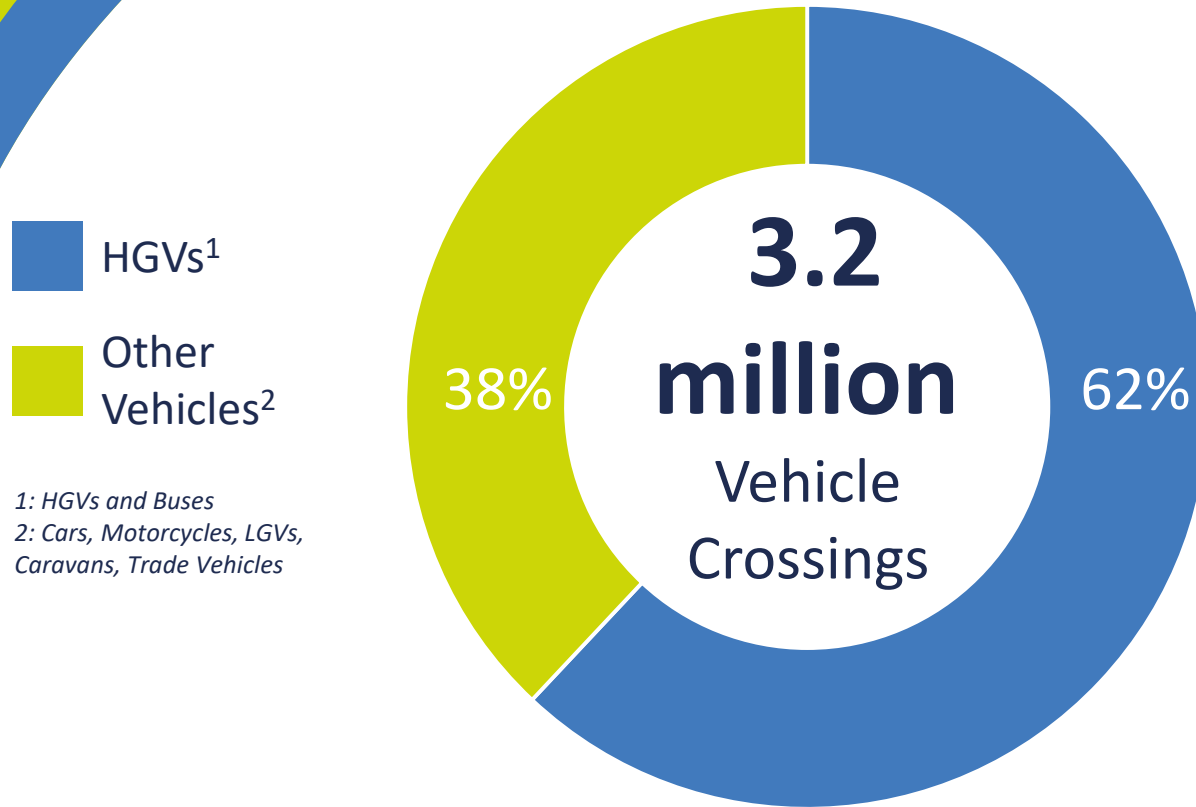
1: [NI Air Passenger Statistics 2018](#), NISRA

2: [Port Freight Statistics: 2018](#), Department for Transport

3: [Statistics of Port Traffic 2018](#), CSO

3.2 million vehicle crossings over the Irish Sea (IE/NI↔GB) per annum

Irish Sea - Vehicle Crossings by Type 2018



During 2018, there were an estimated 3.2 million Irish Sea (IE/NI↔GB) vehicle crossings. Of these:

- 2.0 million (62%) were classed as HGV vehicles (including buses)
- 1.2 million (38%) were classed as Other Vehicles such as cars, motorcycles, LGVs, caravans, etc.....

There were a further 181,000 air traffic movements between airports in NI/IE and GB; and 45,900 vessel arrivals and departures from NI and IE sea ports.

Movement of People and Vehicles

North-South:

- Estimated total NI↔IE border crossings per annum:
 - 110 million people & 72 million vehicles
 - 66 million Other Vehicles (cars, motorcycles, LGVs and caravans)
 - 6.4 million HGVs & Buses

East-West:

- Estimated total Irish Sea (IE/NI↔GB) crossings per annum:
 - 24 million people & 3.2 million vehicles
 - 1.2 million Other Vehicles (cars, motorcycles, trade vehicles, LGVs and caravans)
 - 2.0 million HGVs and buses
- There were a further 181,000 air traffic movements between NI/IE-GB airports; and 45,900 arrivals and departures from NI/IE sea ports

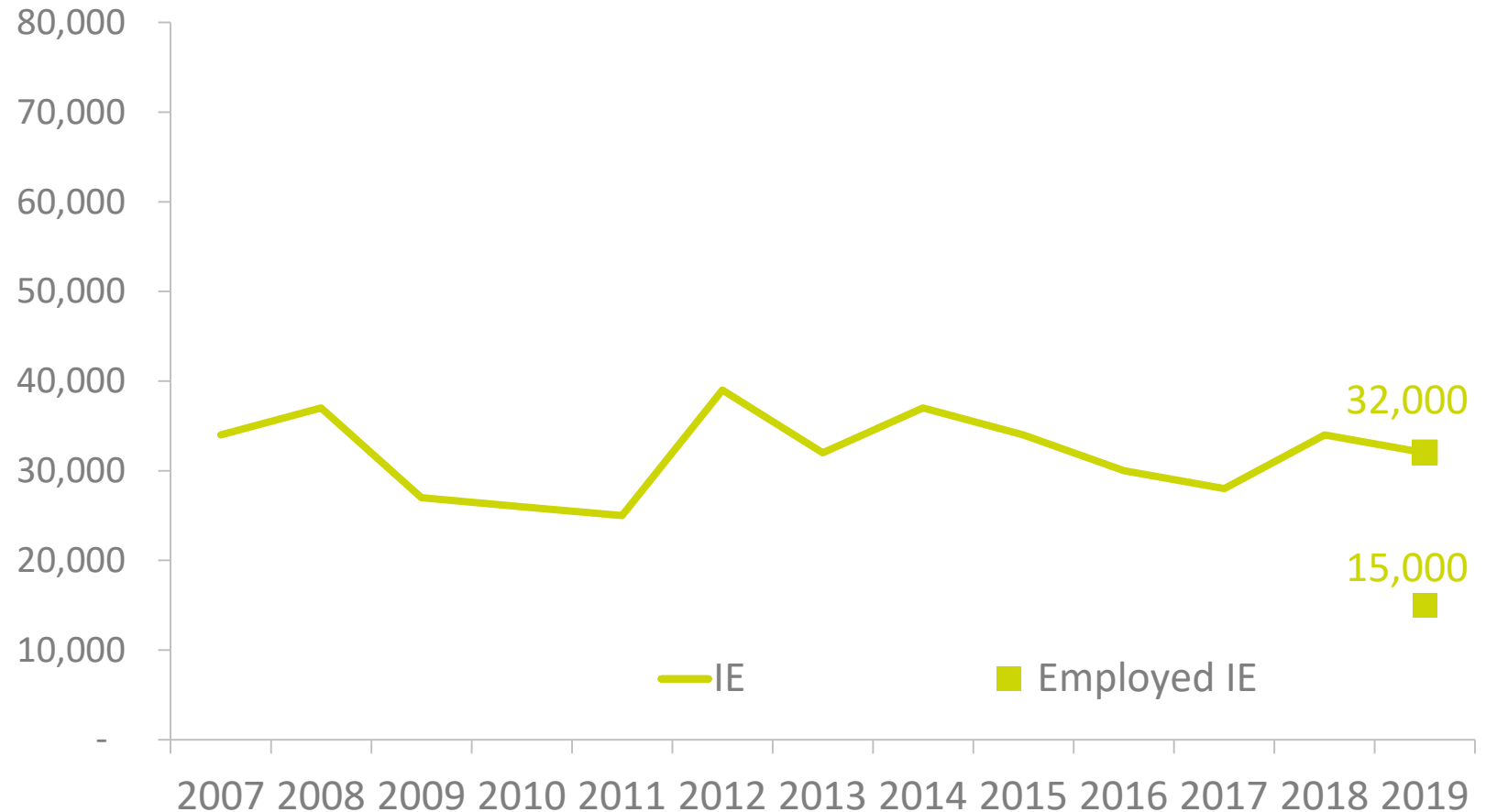
Population Migration

32,000 People born in Ireland and resident in Northern Ireland

Northern Ireland Residents born in **Ireland** and Employed in Northern Ireland (2019)

During 2019 it was estimated that there were:

- 1,469,000 people resident in NI aged 16 or over. Of these 871,000 (59%) were employed and working in NI
- There were 32,000 people resident in NI who were born in Ireland;
 - 30,000 of whom were aged 16 or over. Of these 15,000 (52%) were employed and working in NI



55,000 People born in EU26 and resident in Northern Ireland

During 2019 it was estimated that there were:

- 55,000 people resident in NI who were born in EU26
 - 49,000 of whom were aged 16 or over. Of these 38,000 (78%) were employed and working in NI
- 32,000 people resident in NI who were born in Ireland
 - 30,000 of whom were aged 16 or over. Of these 15,000 (52%) were employed and working in NI

Northern Ireland Residents born in **Ireland** and **EU26** (2007-2019) and Employed in Northern Ireland (2019)

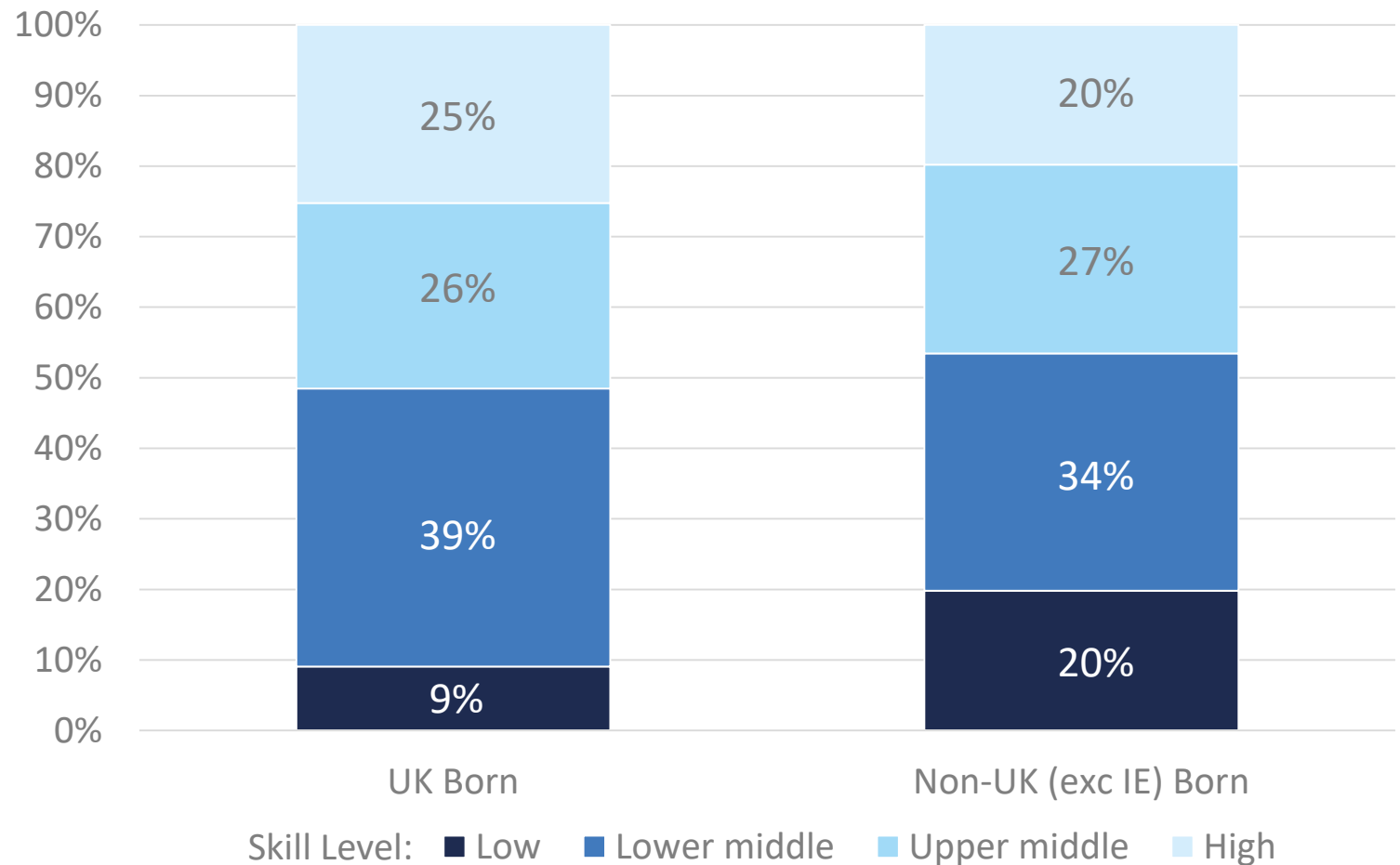


Non-UK born people living and working in Northern Ireland are more likely to work in low skilled jobs

Survey estimates show that in 2018:

- Non-UK born (excluding Ireland) people aged 16-64 who are living and working in Northern Ireland are more likely to work in low skilled jobs than their UK born counterparts

Proportions of Skill Level of Occupation and Country of Birth Groups Employed in Northern Ireland 2019 (aged 16-64)

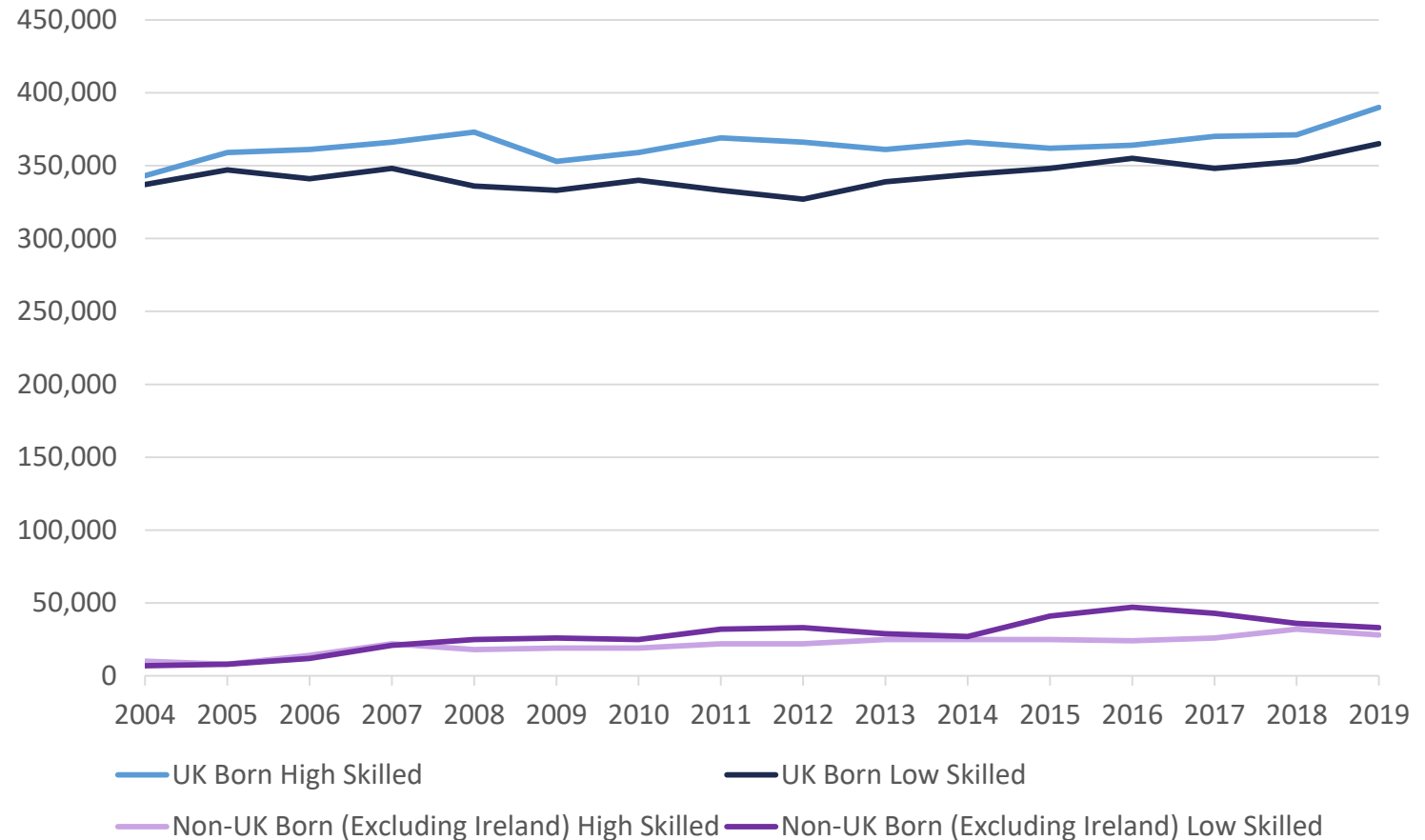


Increase in UK-born people and Non-UK born people living and working in Northern Ireland

Survey estimates show that from 2004 to 2019 there has been:

- An increase of 47,000 UK born people aged 16-64 who are living and working in Northern Ireland in higher skilled jobs (to 390,000 in 2019) and an increase of 29,000 in lower skilled jobs (to 365,000 in 2019)
- An increase of 19,000 Non-UK born (excluding Ireland) people aged 16-64 who are living and working in Northern Ireland in higher skilled jobs (to 28,000 in 2019) and an increase of 26,000 in lower skilled jobs (to 33,000 in 2019)

Number of People by Skill Level and Country of Birth (excluding Ireland) Employed in Northern Ireland 2019 (aged 16-64)



Employment growth since 2014 has been supported by migrant labour

Change in Northern Ireland Employment by Country of Birth
Q1 2008 – Q4 2019 (aged 16-64)

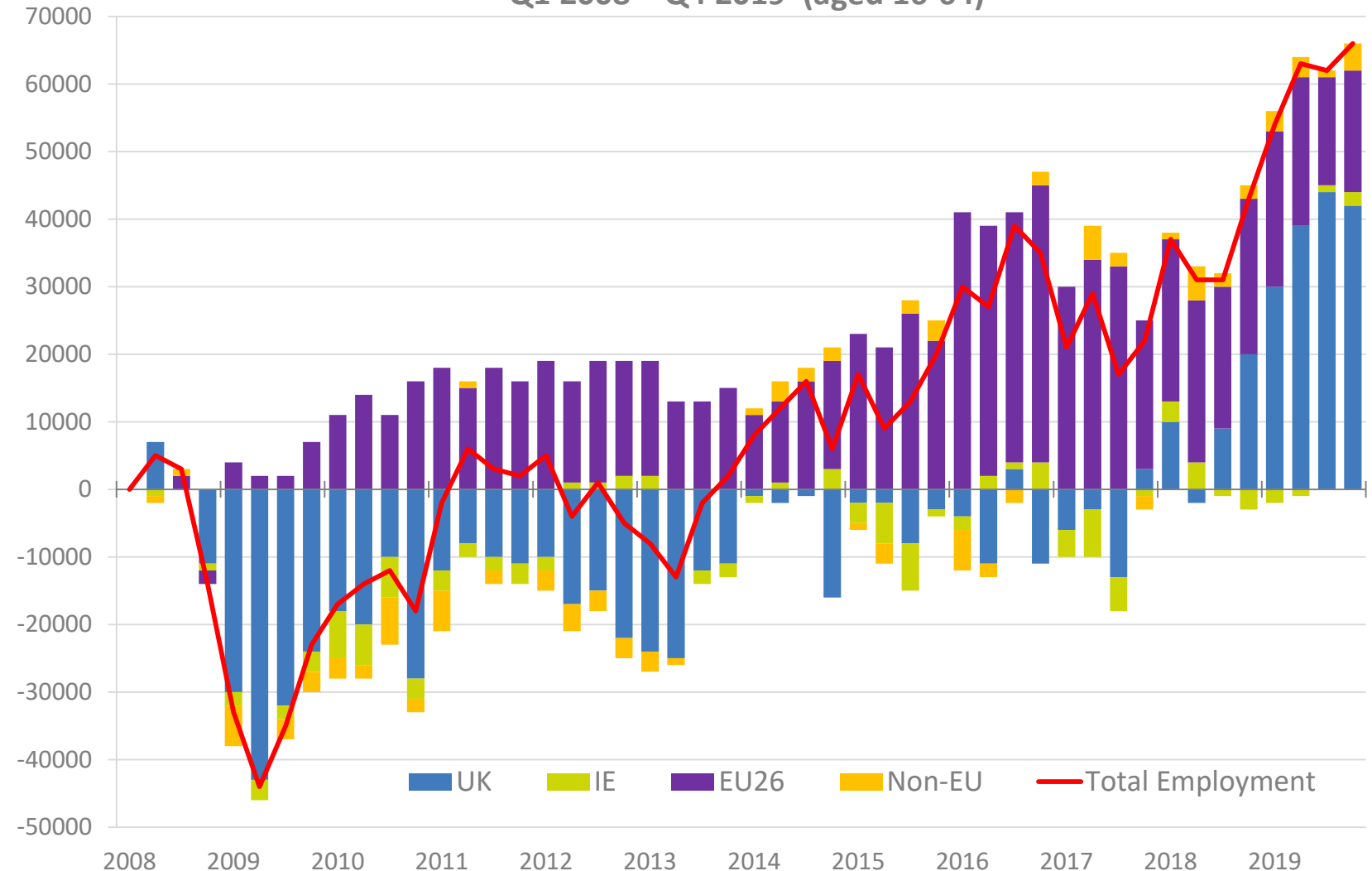
Employment fell by 40,000 between Q1 2008 and Q2 2009 (impact of financial crisis)

By 2014 employment levels were back to pre crisis levels

By 2016 employment had risen by nearly 40,000

Since 2014 employment recovery driven by people born in EU26 now living in Northern Ireland

Since 2019 employment recovery driven by people born in the UK

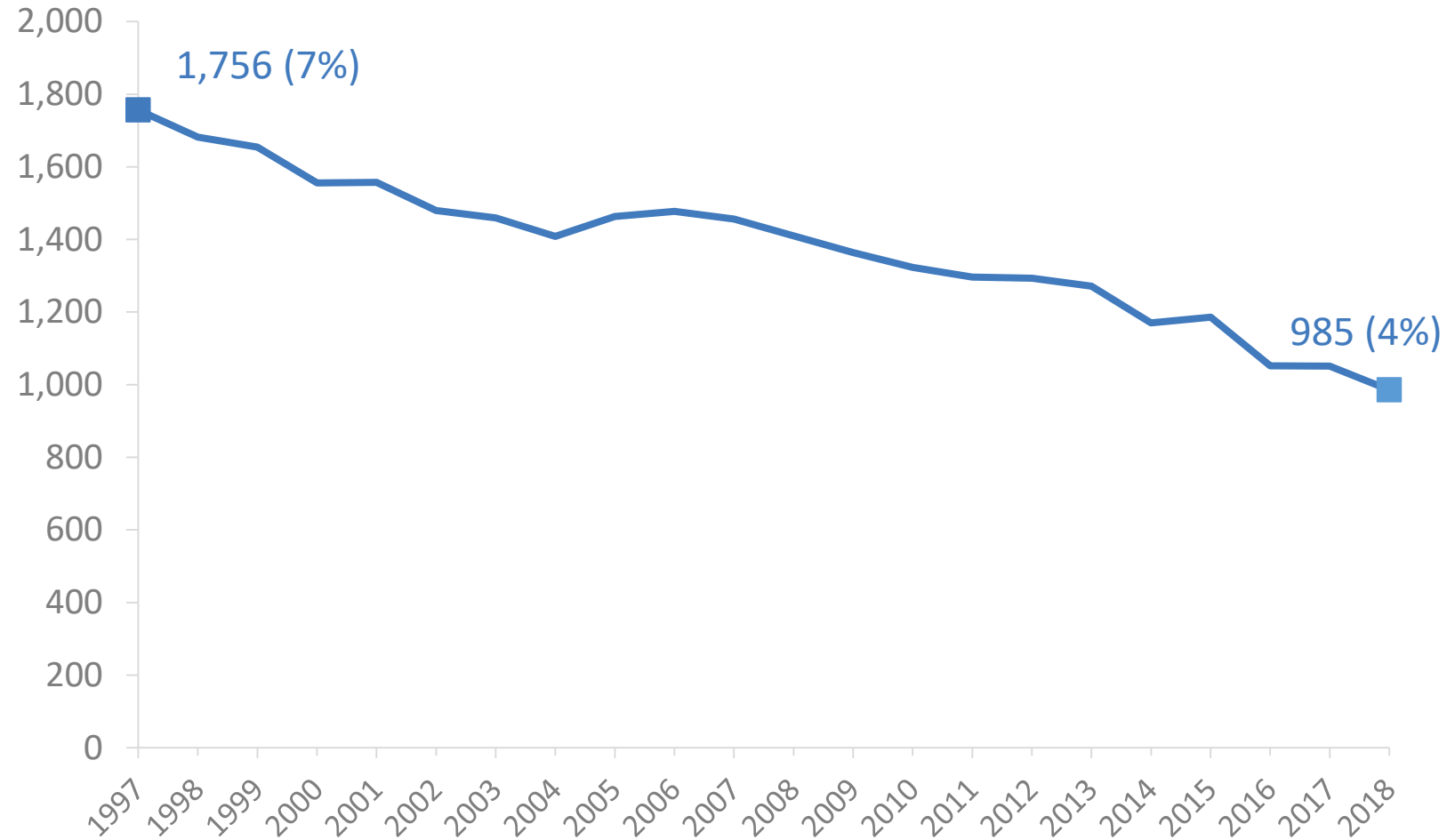


Long-term decline in births in Northern Ireland to mothers who were born in GB

In 2018 there were 22,800 births in Northern Ireland

- 985 of these births were to mothers who were born in GB, representing 4% of all births
- This compares with 1,756 such births 20 years previously in 1997, representing 7% of all births in that year

Births in Northern Ireland to Mothers born in **Great Britain**
(January to December 1997-2018)

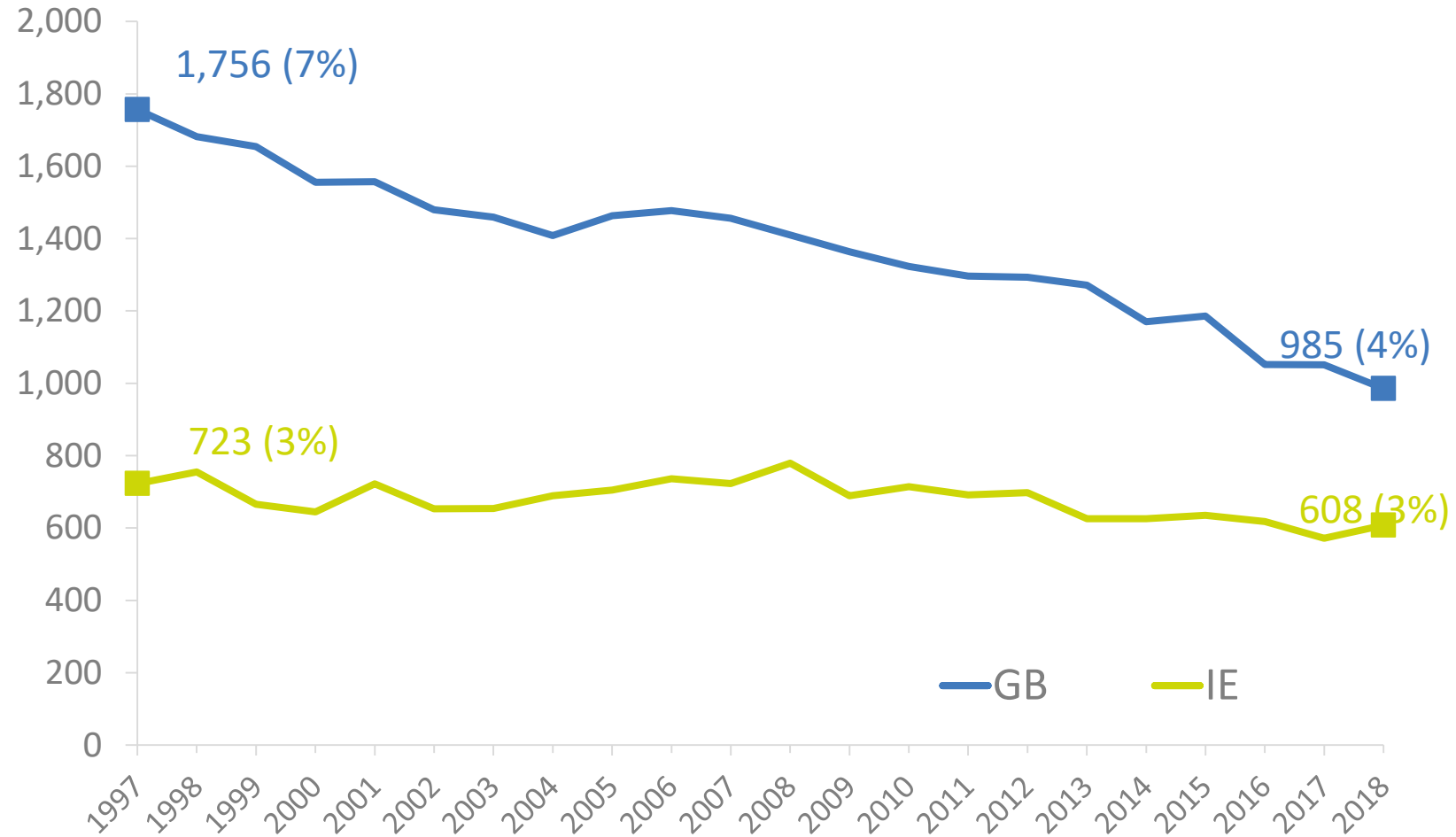


Small fall in births in Northern Ireland to mothers who were born in Ireland

In 2018 there were 22,800 births in Northern Ireland

- 608 of these births were to mothers who were born in Ireland, representing 3% of all births
- This compares with 723 such births 20 years previously in 1997, representing 3% of all births in that year

Births in Northern Ireland to Mothers born in **Great Britain** and **Ireland**
(January to December 1997-2018)

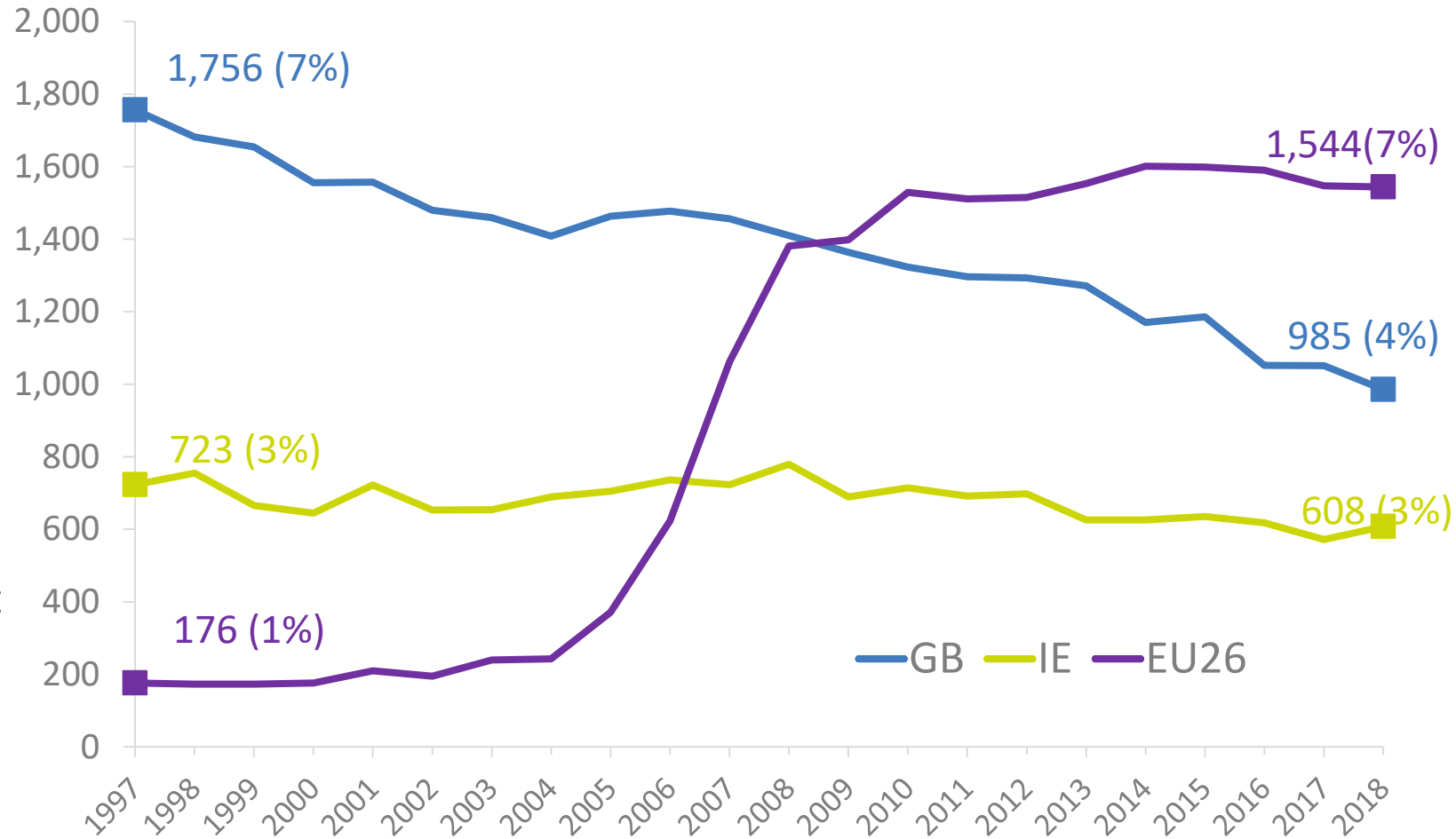


Large rise in births in Northern Ireland to mothers who were born in EU26 countries

In 2018 there were 22,800 births in Northern Ireland

- 1,544 of these births were to mothers who were born in EU26 countries, representing 7% of all births
- This compares with 176 such births 20 years previously in 1997, representing 1% of all births in that year
- The number of such births rose sharply after the expansion of the EU in 2004

Births in Northern Ireland to Mothers born in **Great Britain, Ireland** and **EU26** Countries (January to December 1997-2018)



Migration summary

In 2019, it is estimated that:

- 32,000 people resident in NI who were born in Ireland, 30,000 of whom were aged 16 or over. Of these, 15,000 (52%) were employed and working in NI.
- 55,000 people resident in NI who were born in EU26 countries, 49,000 of whom were aged 16 or over. Of these 38,000 (78%) were employed and working in NI.
- Non-UK born (excluding Ireland) people (aged 16-64) living and working in NI are more likely to work in low skilled jobs.

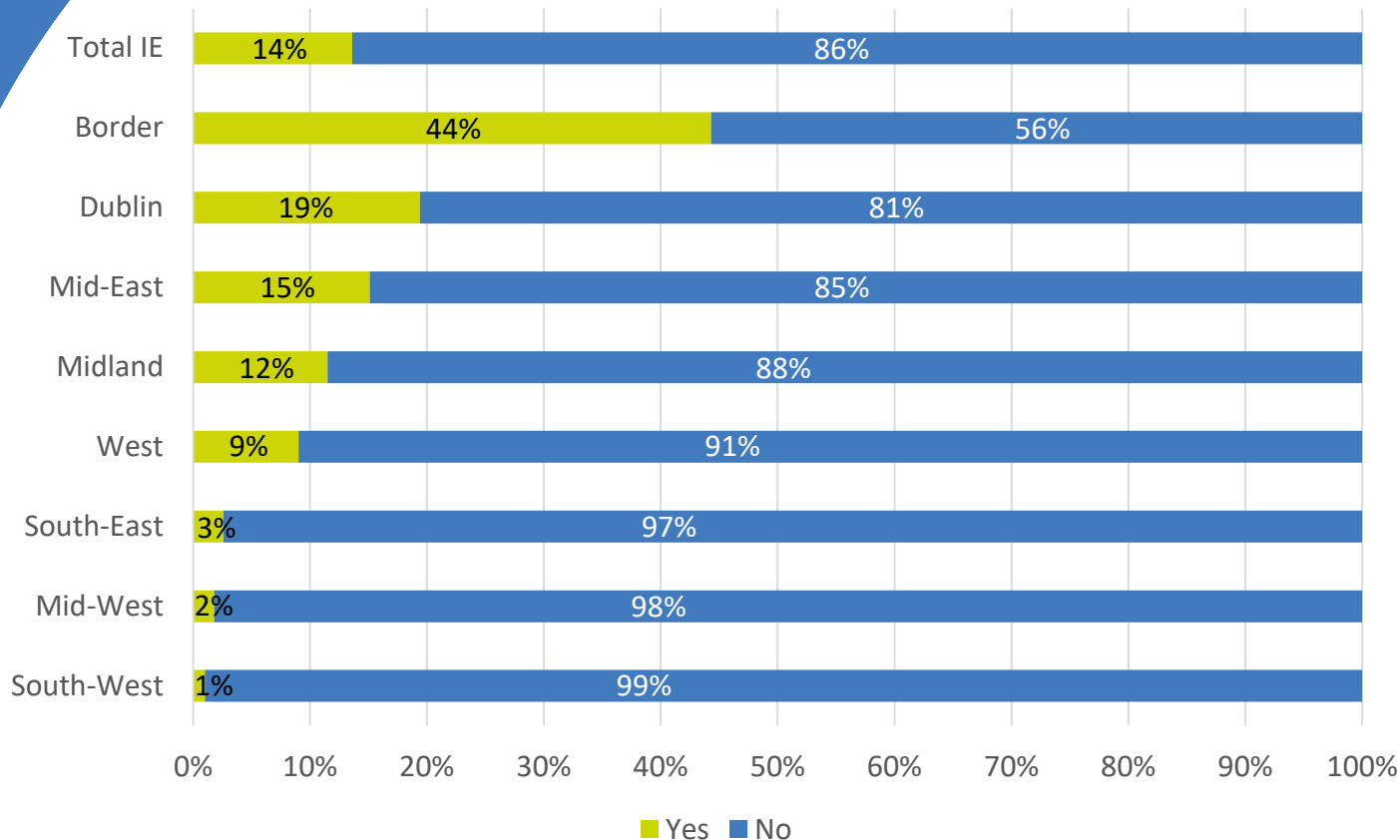
Over the longer-term

- There has been a decline in Northern Ireland births to mothers who were born in GB – down by 44% from 1,756 births in 1997 to 985 births in 2018.
- There has been a large rise in births in Northern Ireland to mothers who were born in EU26 countries – up 777% from 176 births in 1997 to 1,544 births in 2018.

Cross-Border Shopping

44% of households in Ireland located in the 'Border' region made shopping trips to NI

Households in Ireland that made cross-border shopping trips to NI in the 12 months to Q1 of 2018

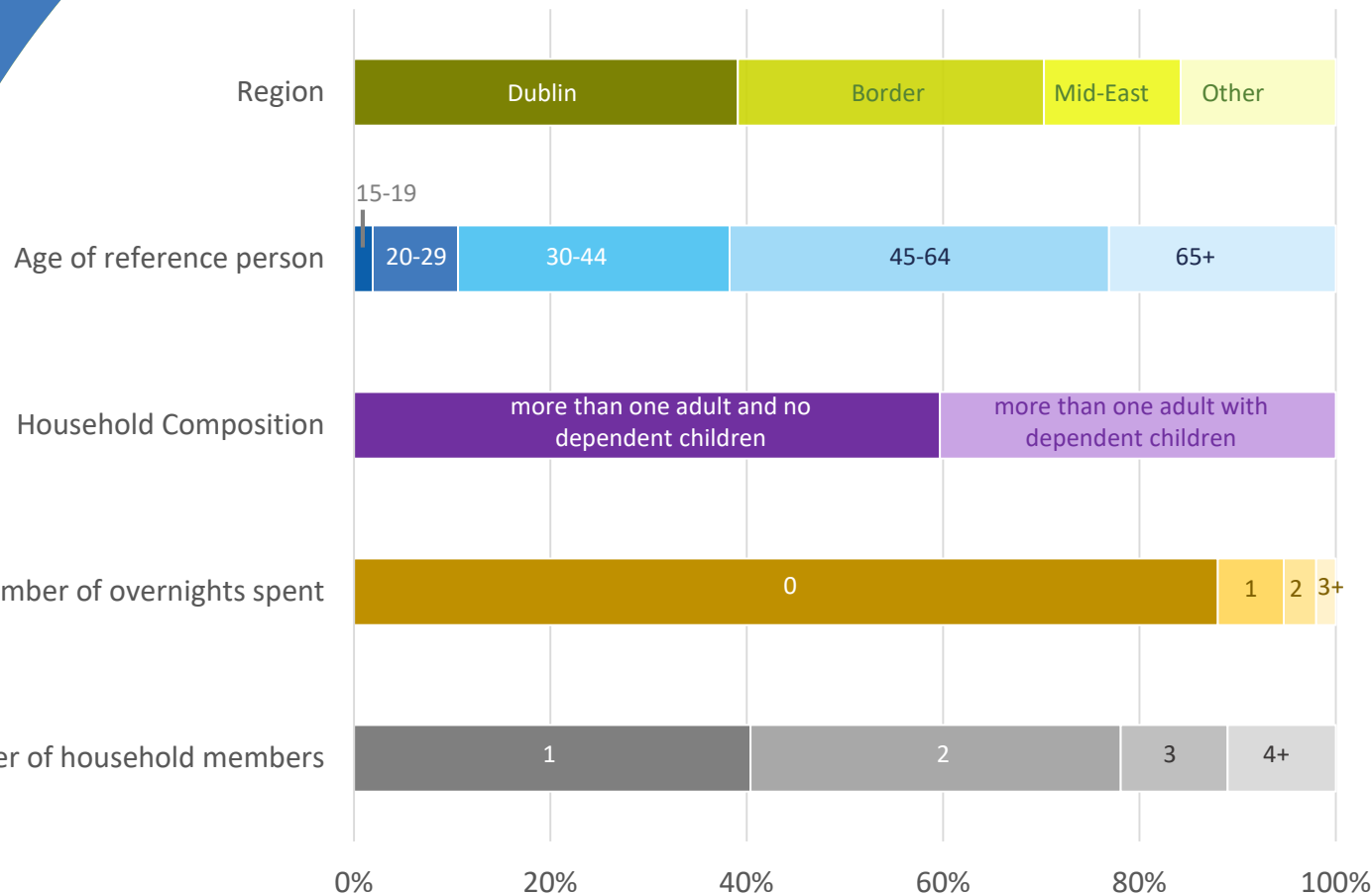


In the 12 months to Q1 of 2018:

- 14% of households in Ireland made at least one shopping trip to NI
- 44% of households living in the 'Border' region took shopping trips to NI
- Almost one fifth (19%) of households living in the 'Dublin' region and 15% of households living in the 'Mid-East' region made cross-border shopping trips

Of the total number of cross-border shopping trips to Northern Ireland by residents from Ireland in the 12 months to Q1 of 2018:

Total number of cross-border shopping trips to NI by IE residents



39% were by households from the 'Dublin' region and 31% from the 'Border' region

39% were by people aged between 45-64 and 28% were by people aged between 30-44

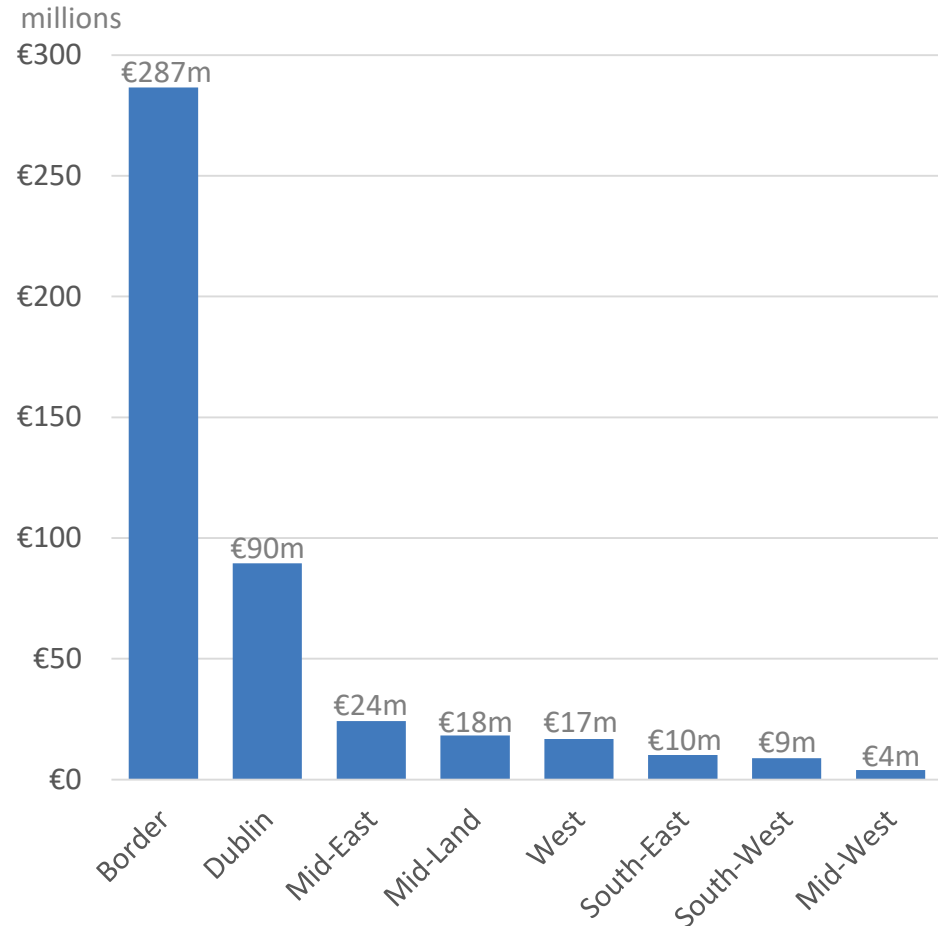
60% were by households with more than one adult and no dependent children

88% were same day visits

40% were taken by one person from the household, and 38% were taken by two household members

An estimated €458 million was spent in NI on cross-border shopping trips by residents from Ireland

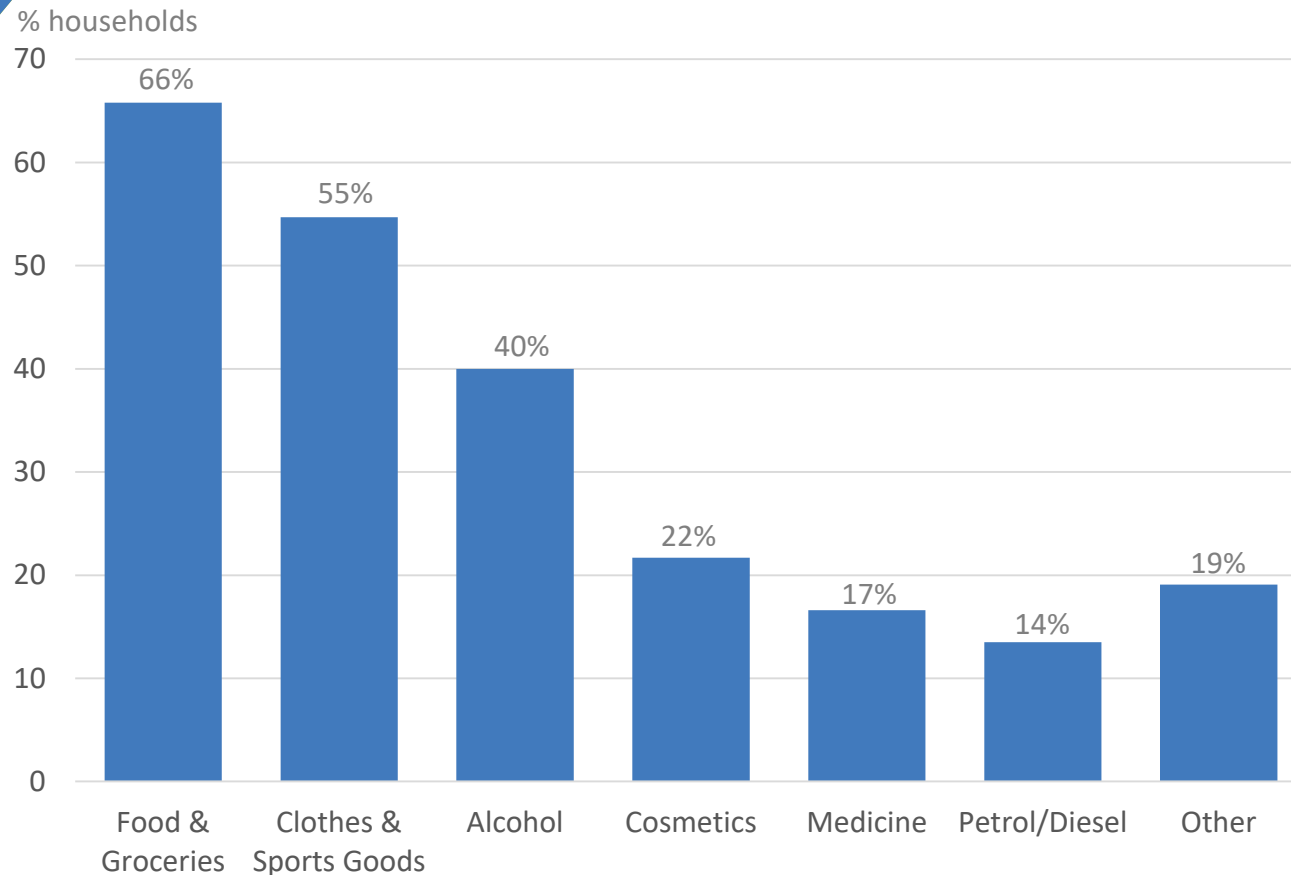
Expenditure in NI on Cross-Border Shopping by residents of Ireland by region



- An estimated €458m was spent in NI on cross-border shopping by IE residents in the 12 months to quarter 1 of 2018
- €287m (63%) can be attributed to IE residents living in the 'Border' region
- A further 20% (€90m) can be attributed to IE residents living in the 'Dublin' region
- The average amount spent by IE residents on their most recent shopping trip to NI was €275

66% of all households in Ireland who made cross-border shopping trips to NI bought 'food & groceries'

Goods purchased in NI on Cross-Border Shopping by residents of Ireland*



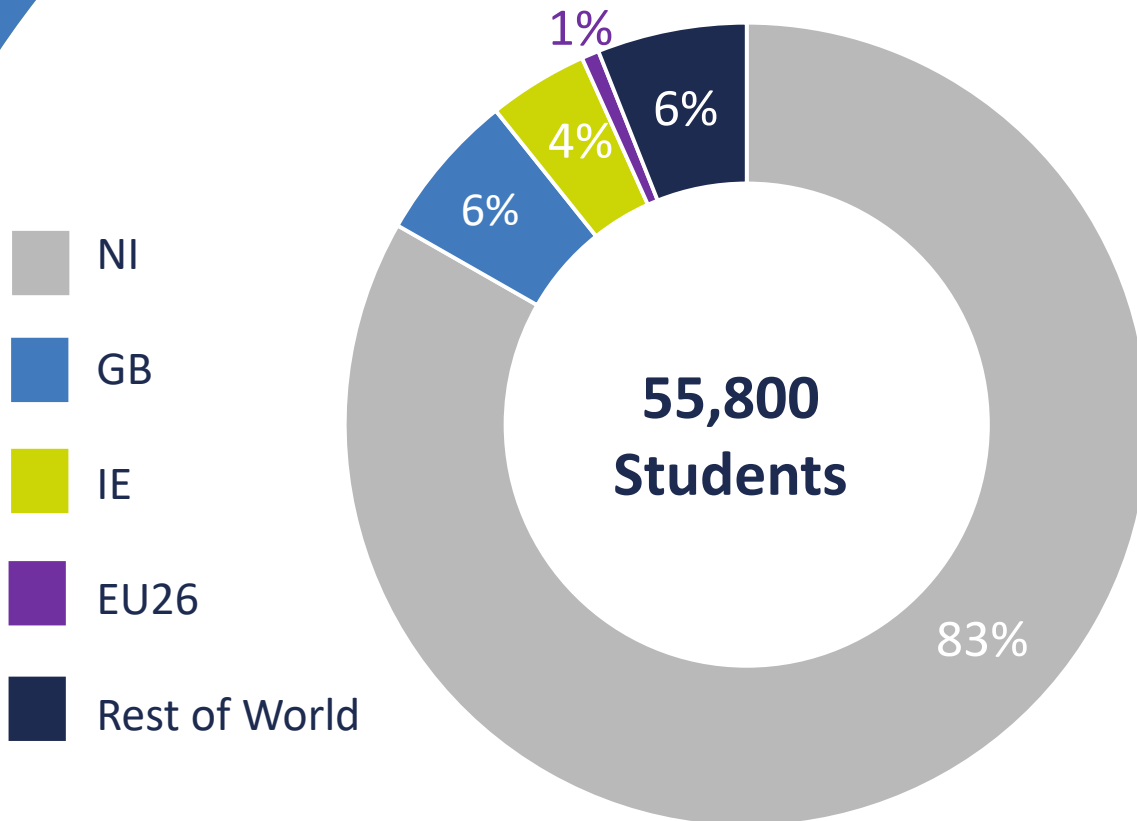
Of all households in Ireland who made cross-border shopping trips to NI:

- 66% bought 'food & groceries'
- 55% bought 'clothes & sports goods'
- 40% bought 'alcohol'
- 22% bought 'cosmetics'

Cross-Border Higher Education

17% of Students at NI Higher Education Institutions in 2018/19 were from outside NI

Proportion of Students Enrolled in NI Higher Education Institutions by Domicile 2018/19

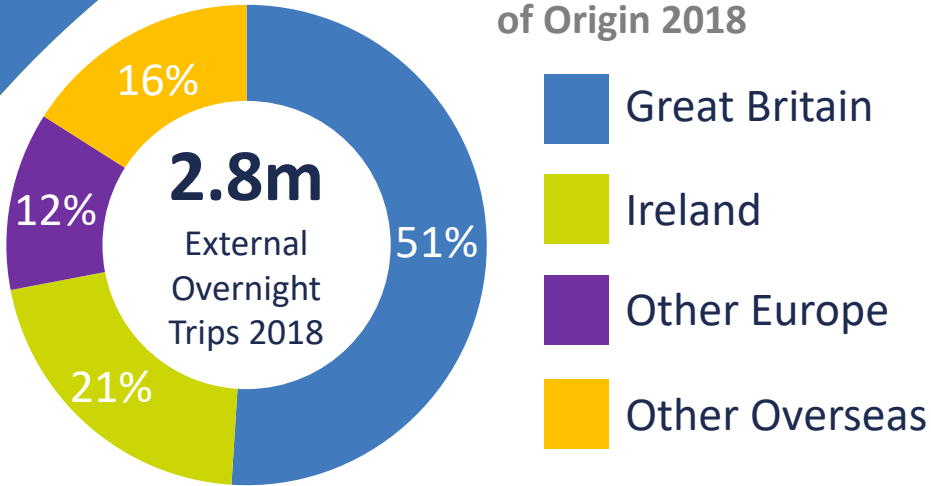


- In 2018/19 some 55,800 students were enrolled in NI Higher Education Institutions. Of these:
 - 46,100 (83%) were from Northern Ireland
 - 3,500 (6%) were from Great Britain
 - 2,200 (4%) were from Ireland
 - 400 (1%) were from EU26
 - 3,500 (6%) were from the Rest of the World
- In 2017/18, there were 1,500 Ireland domiciled students at the three NI Further Education Colleges near the border - 5% of their students

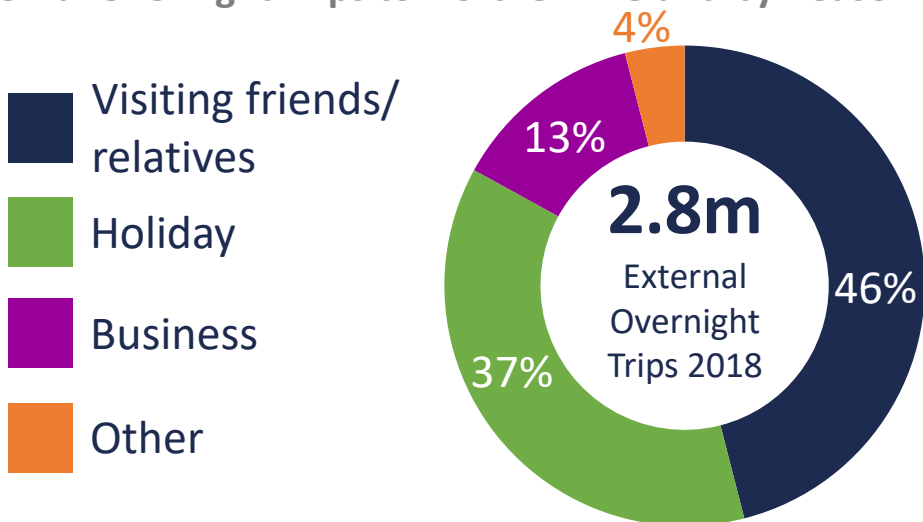
Tourism

During 2018 there were 2.8 million external overnight trips to NI resulting in expenditure of £669 million

External Overnight Trips to Northern Ireland by Place of Origin 2018



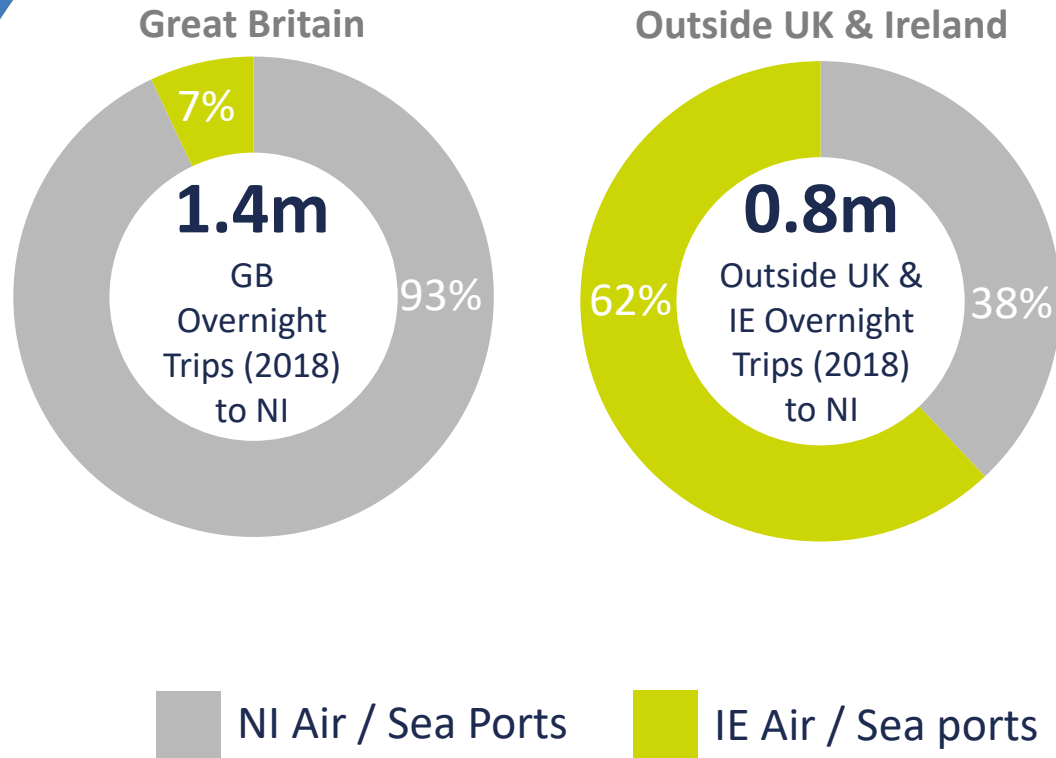
External Overnight Trips to Northern Ireland by Reason for Visit 2018



- 2.8 million external overnight trips to Northern Ireland in 2018
- 84% of overnight visitors were from GB, Ireland and Other Europe
- £669 million was spent by visitors to NI on overnight trips – equivalent to 2% of NI's GVA (Gross Value Added) of £39.6 billion in 2017
- 1,049,000 external overnight holiday trips were made by visitors
- 352,000 external overnight business trips made by visitors

62% of visitors from Outside UK & IE come through IE ports

Great Britain and Outside UK & Ireland Overnight Trips to Northern Ireland by Place of Departure 2018



- 62% of Outside UK & Ireland visitors to NI used an air or sea port in Ireland as part of their journey
- 93% of GB visitors came directly to NI using a Northern Ireland air or sea port

Contacts

For further information please contact:

Patrick O’Kane (Patrick.O'Kane@nisra.gov.uk / 028 9025 5161)

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