

Northern Ireland Tourism Statistics April 2012 to March 2013

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This report provides the most recent (April 2012 – March 2013) provisional tourism statistics for Northern Ireland (NI) from a combination of NISRA official statistics and Republic of Ireland (ROI) sources. It contains information on overnight trips made to NI from Great Britain (GB), overseas, and ROI visitors as well as NI residents who made overnight trips within NI. The main results show:

- The estimated total number of overnight trips to Northern Ireland in the period April 2012 – March 2013 increased by 1% to 4.09 million compared to the same period in the previous year.
- Tourist expenditure during overnight trips increased over the same period by 10% to £698 million when compared to 2011-2012.
- Estimates for the first quarter of 2013 (January – March) indicate that the total number of overnight trips to NI increased by 17%, while expenditure during these overnight trips grew by 14% compared to the same period in the previous year.
- When NI residents are excluded, the total number of estimated visitor overnight trips from outside NI increased by 13% and associated expenditure increased by 6% to the first quarter of 2013.
- Most of the growth in the estimated number of overnight visitor trips from outside NI to the first quarter of 2013 was due to an increase (+20%) in those visiting friends and relatives. Holiday trips and business trips also increased to the first quarter of 2013.

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1. Key Findings

This bulletin brings together data from a range of sources to help provide an overall assessment of the number of overnight trips to NI, the associated number of nights and expenditure. It provides headline figures for the most quarter 1 and detailed information for 12 months to March. Prior to 2013, the information contained in the bulletin was published in a range of monthly reports. Following responses to a recent consultation, the decision has been made to wait until complete information is available from the various monthly sources and to publish on a quarterly basis. A summary of the consultation and NISRA response can be found at http://www.detini.gov.uk/deti-stats-index/tourism-statistics/user_engagement.htm

The information provided in this bulletin 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 aim to increase visitor numbers to 4.2 million and tourist revenue to £676 million by December 2014.

All overnight trips in NI

The estimated number of overnight trips in NI by NI residents and external visitors over the twelve month period to March 2013 has increased by 1% (to 4.09 million) compared to the previous year (Table 1). There was a 5% decrease in the number of nights spent in NI on the trips, suggesting that trips taken in the April 2012 to March 2013 period were of a shorter duration than the same period in the previous year. Visitor expenditure during these overnight trips was nevertheless estimated to have increased by 10% (to £698 million) over the same period.

In terms of the first quarter of 2013 (January to March), the estimated number of overnight trips to NI rose by 17% compared to the same period in 2012. The number of nights and the expenditure associated with these trips rose by 10% and 14% respectively (Table 1).

Table 1 Estimated percentage change^(1,2) in overnight trips, nights and expenditure for the 12 months to March and quarter 1 2012, 2013.

	Apr 2011-Mar 2012 to Apr 2012-Mar 2013	Jan-Mar 2012 to Jan-Mar 2013
Overall trips (000s)	+1%	+17%
Overall Nights (000s)	-5%	+10%
Overall Expenditure (£m)	+10%	+14%

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), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

All overnight trips - Reason for visit

The information in this section is based on trips by both NI residents and those from outside NI. There was a 6% decrease in the number of overnight trips that were for holiday purposes in the 12 month period April 2012 to March 2013 compared with the previous year. In contrast, there was a 4% rise in the number of visits to friends or relatives.

There was a 1% increase in the estimated number of overnight trips for holiday purposes to the first quarter of 2013 compared to the first quarter of 2012. However, there was a 21% rise in the estimated number visiting friends or relatives and a 27% increase in the number of overnight trips made for business purposes (Table 2).

Table 2 Estimated percentage change^(1,2) in overnight trips in NI by reason for visit for the 12 months to March, and quarter 1 2012, 2013.

	Apr 2011-Mar 2012 to Apr 2012-Mar 2013	Jan-Mar 2012 to Jan-Mar 2013
Holiday	-6%	+1%
Visiting friends/Relatives	+4%	+21%
Business	+13%	+27%
Other	+17%	+81%
Total	+1%	+17%

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), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA
- 3) Estimated based on a sample size of 51-100 appear shaded as

Visitors from outside NI

Trips taken within NI by NI residents accounted for half of all overnight trips taken in 2012/13. When NI residents are excluded, the estimated number of non resident visitor overnight trips increased by 4% between April 2011-March 2012 and April 2012-March 2013. Estimated expenditure by this group during these trips increased by 9% over the same period.

The first quarter of 2013 showed an increase of 13% in the number of non resident visitor overnight trips to NI from the same period in the previous year. Expenditure increased by 6% over in the same period for such visitors (Table 3).

Table 3 Estimated percentage change^(1,2) in visitor overnight trips, nights and expenditure (excluding NI residents) for the 12 months to March and quarter 1 2012, 2013.

	Apr 2011-Mar 2012 to Apr 2012-Mar 2013	Jan-Mar 2012 to Jan-Mar 2013
Overall trips (000s)	+4%	+13%
Overall Nights (000s)	0	+2%
Overall Expenditure (£m)	+9%	+6%

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), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, and the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)

Visitors from outside NI – Reason for visit

In the April 2012-March 2013 period, there was an increase (20%) in the estimated number of overnight trips made to NI by non-residents for holiday purposes compared to the same period in the previous year. The estimated number of overnight trips to visit friends and relatives was down by 4% over the same period.

There was an 11% rise in the estimated number of overnight trips made to NI by non-residents for holiday purposes to the first quarter of 2013, when compared with the same period in 2012. The most marked increase was in the number of non residents visiting friends and relatives which rose by 20% over the same period.

Table 4 Estimated percentage change^(1,2) in all visitor overnight trips in NI (excluding NI residents) by reason for visit for the 12 months to March and quarter 1 2012, 2013.

	Apr 2011-Mar 2012 to Apr 2012-Mar 2013	Jan-Mar 2012 to Jan-Mar 2013
Holiday	+20%	+11%
Visiting friends/Relatives	-4%	+20%
Business	+7%	+11%
Other	+6%	-33%
Total	+4%	+13%

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), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, and the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)
- 3) Estimated based on a sample size of 51-100 appear shaded as

Occupancy rates

Hotels

The room occupancy rate for hotel rooms in NI increased by 5 percentage points (to 65%) between April 2011-March 2012 and April 2012-March 2013, with bed spaces sold showing an increase of 9% over the same period. In contrast, the room occupancy rate for hotels in the first quarter of 2013 was 1 percentage point lower than that for the same period in the previous year, while bed spaces sold showed an increase of 3%.

B&B/Guesthouse/Guest Accommodation

The room occupancy rate for the B&B/guesthouse/guest accommodation sector increased by 5 percentage points (to 34%) between April 2011-March 2012 and April 2012-March 2013 and by 2 percentage points between the first quarter of 2012 and the first quarter of 2013. Bed spaces sold in B&Bs, guesthouse and guest accommodation increased by 12% in the 12 months to March 2013 when compared to the same period in the previous year. There was also an increase (13%) in the number of bed spaces sold in the first quarter of 2013 compared to the first quarter of 2012.

Table 5 Percentage/percentage point change⁽¹⁾ in occupancy rates for the 12 months to March and quarter 1 2012, 2013.

	Apr 2011-Mar 2012 to Apr 2012-Mar 2013	Jan-Mar 2012 to Jan-Mar 2013
Hotel room occupancy	+5pps	-1pps
Hotel bed spaces sold	+9%	+3%
B&B, Guesthouses and Guest accommodation room occupancy	+5pps	+2pps
B&B, Guesthouses and Guest accommodation bed spaces sold	+12%	+13%

Notes:

1) differences have been calculated on unrounded figures

For information on definitions, data sources, confidence intervals please refer to the background notes section.

2. Commentary

Overnight trips and spend by all visitors up over the quarter and year

Some 4.09 million overnight trips were made by NI residents and non residents in the April 2012 – March 2013 period, in NI. This represents an increase over both the quarter (+17%) and over the most recent 12 months to March (+1%), compared to the equivalent periods in the previous years. Expenditure associated with these overnight trips also increased over the quarter (+14%) to £119 million and most recent 12 months to March (+10%) to £698 million.

The previously reported annual figures for 2012 had shown that numbers of overnight trips were relatively flat and associated expenditure was up by 7%, compared to 2011. The first quarter figures for 2013 have therefore contributed to improved growth over the 12 months to March 2013.

Quarter 1 growth driven by NI residents

However, it is important to note that nearly sixty per cent of the increase in overnight trips in the first quarter was due to more NI residents taking overnight trips within NI. This represents something of an improvement on 2012 as a whole, when overnight trips by local residents were down 2% compared to 2011.

Growth mainly due to increase in visiting friends and relatives

Most of the growth in total overnight trips (i.e. NI resident and non-resident) over the quarter and over the year was due to an increase in the number of overnight visits made to visit friends and relatives (21% and 4% respectively). The number of overnight trips for business purposes also increased over the quarter (+27%) and over the year (+13%). In contrast, the number of overnight trips for holiday purposes was up (+1%) in the first quarter but down over the year (-6%), compared to the same periods in the previous year. This reflects a decline in overnight trips for holidays by NI residents to the 1st quarter 2013 and the 12 months to March 2013.

More GB and Rol overnight trips but fewer “overseas” visitors in Q1 2013

When NI residents are excluded, the number of overnight trips increased by 4% over the 12 months to March 2013, and by 13% to the first quarter of 2013, compared to the same periods in the previous year. This was mainly driven by an increase in the number of visitors from Great Britain (+27%) and to a lesser extent the Republic of Ireland (+3%) to the first quarter. This also helped offset a decrease in the number of visitors from overseas (i.e. excluding GB), which fell by 7% to quarter 1 2013 compared to the same period in 2012.

Growth in first quarter visitors from outside NI due mainly to visits to friends and relatives but also for holiday and business purposes

Nearly three quarters of the increase in visitor numbers from outside Northern Ireland in quarter 1 2013 was due to an increase in the number of overnight visits made to visit friends and relatives (+20%), when compared to quarter 1 2012. However, there was also evidence that holiday visits and business trips by non residents increased (by 11% each) over the first quarter.

Some growth in hotel occupancy figures

The overall growth in total overnight visitor numbers over the quarter (+17%) and over the year (+1%) has been partly reflected in growth in the total number of hotel bed spaces sold over the quarter (+3%) and over the year (+9%). Of course, not all of the increases in overnight visitor numbers would have been expected to result in increased hotel occupancy figures. This is because most of the growth in overnight visitors was due to visits to friends and relatives, which may not involve a hotel stay.

Summary

The total number of overnight trips taken in Northern Ireland (NI) increased by 1% to 4.09 million in the 12 month period to March 2013, when compared to the same period in the previous year (April 2011-March 2012). First quarter results also indicate growth compared to the same quarter in 2012. External events that may have influenced tourist activity in the first quarter included the start of the UK City of Culture year in Derry-Londonderry and the 'Backing' Belfast' campaign. The latter was in response to the disturbances which received widespread media coverage in late 2012 and the early part of 2013. There was also marked bad weather in the last week of March.

Although it is not possible to tell from the survey results, the availability of additional air routes to Great Britain may also have contributed to growth in visitor numbers from this market. The most recent estimates for all tourist activity in Northern Ireland in the first quarter of 2013, compared to the same period in the previous year showed growth (+17%). As noted, growth was also recorded in the most recent 12 months to March when compared to the same period the previous year, when a rise of 1% in all visitor trips was reported.

About sixty percent of the increase in total visitor numbers in the first quarter of 2013 was due to increased overnight visits by local residents for the purposes of seeing friends and relatives. However, there was also an increase in the total number of visits by non residents in this quarter. Nearly 75% of this increase was also due to visits to see friends and relatives but included an increased number of holiday visits, and visits for business purposes compared to the first quarter of 2012. Although the number of GB visitors increased by more than 25% over the same period, there was a decline in the number of other overseas visitors (-7%) in the first quarter of 2013.

The previously reported annual figures for 2012 can be found at http://www.detini.gov.uk/northern_ireland_annual_tourism_statistics_publication_2012_-_july_2013_13092013_.pdf

3. Estimated number of overnight trips, nights and expenditure, April 2012 to March 2013

All Visitors 2011-12 to 2012-13

The estimated number of overnight trips in NI increased by 1% to 4,090,000 during April 2012-March 2013 when compared to April 2011-March 2012. This includes visits by tourists from the Republic of Ireland (ROI), Great Britain (GB) and overseas as well as residents taking overnight trips within NI. During these overnight trips, visitors spent an estimated £698 million, an increase of 10% compared to the same period in the previous year.

Table 6 Estimated^(1,2) number of overnight trips, nights and expenditure in NI (all visitors) for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
Overall Trips (000s)	4,034	4,090	+1
Overall Nights (000s)	14,845	14,105	-5
Overall Expenditure (£m)	632	698	+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 Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

There was an increase of 4% in the estimated number of overnight trips in NI to visit friends/relatives - 1,678,000 in April 2012-March 2013 and 1,610,000 in April 2011-March 2012. In contrast, there was a 6% decrease in those visiting NI for holiday purposes during this period (Table 7).

Table 7 Estimated⁽¹⁾ number of overnight trips (thousands) in NI by reason for visit for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
Holiday	1,798	1,694	-6
Visiting Friends/Relatives	1,610	1,678	+4
Business	369	418	+13
Other	257	300	+17
Total^(2,3)	4,034	4,090	+1

Notes:

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- 2) Figures may not add to totals due to rounding
- 3) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

Estimated number of overnight trips, nights and expenditure for GB, overseas, ROI and NI Domestic markets in the 12 months to March 2013

Examining the estimated number of overnight trips by market shows the largest increase in visitor numbers was in the GB market with 5% more visitors (49,000) during April 2012 - March 2013 (1,085,000) when compared to that of 2011-2012 (1,036,000). There was also an increase in ROI visitors (+9%), whereas overseas visitors showed no change. However, there was a decrease of 1% in the estimated number of domestic overnight trips taken by residents of NI when comparing the April 2012 - March 2013 figure with that for the same period of 2011-2012 (Table 8).

Table 8 Estimated⁽¹⁾ number of overnight trips (thousands) in NI for GB, overseas, ROI and NI Domestic markets for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
GB visitors ⁽²⁾⁽³⁾	1,036	1,085	+5
Overseas visitors ⁽²⁾⁽³⁾	513	514	0
Total Overseas⁽³⁾	1,549	1,599	+3
ROI visitors ⁽⁴⁾	396	433	+9
Total visitors from outside NI⁽³⁾	1,945	2,032	+4
Domestic overnight trips ⁽⁵⁾	2,089	2,058	-1
Total^(2,3,4,5)	4,034	4,090	+1

Notes:

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- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 3) Figures may not add to totals due to rounding
- 4) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)
- 5) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

The number of nights spent in NI during these overnight trips fell by 5%, with the largest decreases seen in the ROI and NI domestic markets, -4% and -15% respectively. The estimated number of nights spent in NI by visitors from GB also fell by 1%. In contrast, nights spent by the overseas market showed an increase of 2% between April 2011-March 2012 and April 2012-March 2013 (Table 1 in Annex 1).

Estimated tourist expenditure for these overnight trips increased from £632 million to £698 million (+10%) over the period of April 2012 – March 2013 when compared to that of 2011-2012. A further examination of the figures by market shows that there was an increase in expenditure in all categories over the period, with ROI visitors showing the largest increase (+14%). However, at £248 million, visitors from GB contributed 36% of the total expenditure (Table 2 in Annex 1).



Visitors from outside NI 2011-12 to 2012-13

When NI residents are excluded, the estimated number of visitor overnight trips to NI rose by 4% from 1,945,000 in April 2011-March 2012 to 2,032,000 in April 2012-March 2013. Increases of 20% and 7% were seen in those visitors who were in NI for holiday and business purposes respectively. Although the number visiting friends and relatives fell by 4% from 1,002,000 in April 2011-March 2012 to 957,000 in April 2012-March 2013, this was the main reason for visitor trips to NI.

Table 9 Estimated^(1, 2, 3) visitor overnight trips (thousands) to NI (excluding NI residents) by reason for visit for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
Holiday	178	198	+11
Visiting friends / relatives	605	630	+4
Business	214	219	+3
Other	40	37	-7
GB visitors⁽²⁾⁽³⁾	1,036	1,085	+5
Holiday	251	270	+8
Visiting friends / relatives	190	155	-18
Business	60	67	+11
Other	11	22	+95
Overseas visitors⁽²⁾⁽³⁾	513	514	0
Holiday	106	171	+61
Visiting friends / relatives	207	171	-17
Business	18	26	+50
Other	65	64	-1
ROI⁽²⁾⁽³⁾	396	433	+9
Holiday	535	639	+20
Visiting friends / relatives	1,002	957	-4
Business	292	312	+7
Other	116	123	+6
Total⁽²⁾⁽³⁾	1,945	2,032	+4

Notes:

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- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 3) Figures may not add to totals due to rounding
- 4) Estimates based on a sample size of 30 or less appear shaded as 
- 5) Estimated based on a sample size of 51-100 appear shaded as 

4. Estimated number of overnight trips, nights and expenditure, January – March 2013

All visitors quarter 1 2012 to quarter 1 2013

The estimated number of overnight trips to NI grew by 17% to 852,000 during January-March 2013 from 727,000 in the same period of 2012 (Table 10). These figures include visitors 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 rose by 10%, to 2,657,000 (2013) from 2,407,000 (2012) during the January - March period and tourist expenditure also increased over the period of January – March 2013 from £104 million to £119 million (+14%) when compared to that of 2012.

Table 10 Estimated ^(1,2,3) number of overnight trips, nights and expenditure in NI (all visitors) for quarter 1 2012, 2013

	Jan-Mar 2012	Jan-Mar 2013	% Change
Overall Trips (000s)	727	852	+17
Overall Nights (000s)	2,407	2,657	+10
Overall Expenditure (£m)	104	119	+14

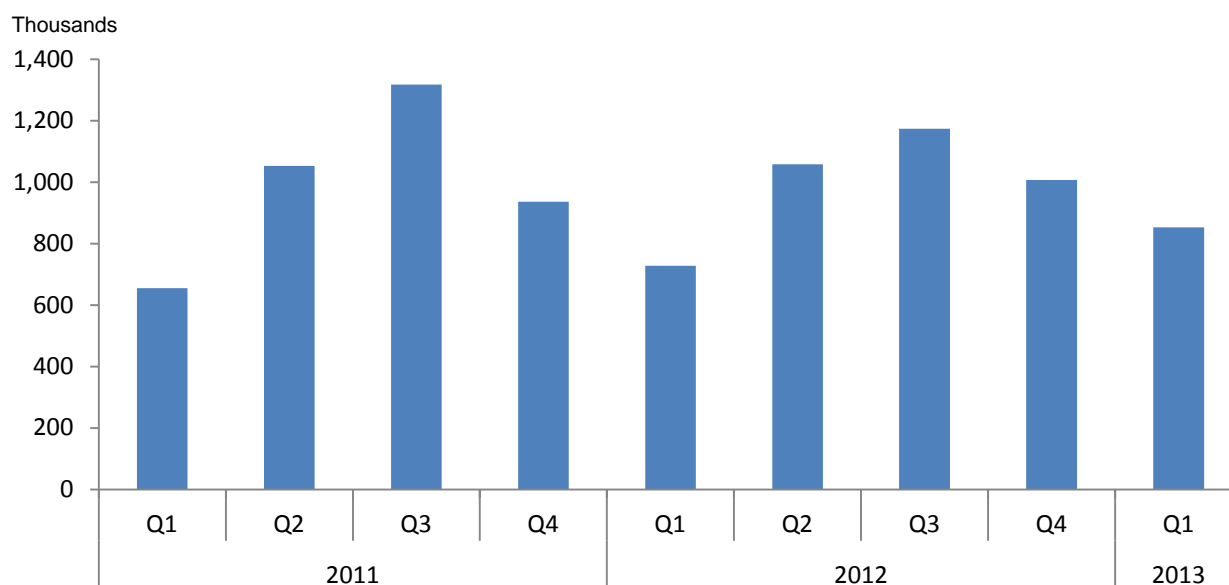
Notes:

- 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), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA*
- 3) *Figures may not add to totals due to rounding*

The estimated number of overnight trips in NI for each quarter from quarter 1 2011 (January-March) to quarter 1 2013 is shown in chart 1. These data have not been adjusted for any seasonality effect.

The chart illustrates that the largest number of estimated NI overnight trips are taken in quarter 3 in both 2011 and 2012. Quarter 1 shows a lower estimated number of overnight trips in 2011 and 2012 when compared to the other quarterly data for those years. The estimated number of overnight trips taken in quarter 1 in each year will be based on a relatively small sample size, resulting in increased volatility in the figures. Where available, confidence intervals for the individual sources are provided in Section 7 - Background Notes.

Chart 1 Estimated number of overnight trips, Q1 2011 to Q1 2013



Between quarter 1 (January-March) of 2012 and quarter 1 of 2013, there was an increase of 1% in the estimated number of overnight trips to NI for holiday purposes. There was, however, an increase of 21% in the estimated number of overnight trips to visit friends or relatives and a 27% increase in the number visiting for business reasons.

Over half (51%) of the estimated visits to NI in the first quarter of 2013 were to visit friends or relatives and under one third (30%) were for holiday purposes.

Table 11 Estimated⁽¹⁾ visitor overnight trips (thousands) spent in NI by reason for visit for quarter 1 2012, 2013

	Jan-Mar 2012	Jan-Mar 2013	% Change
Holiday	253	256	+1
Visiting Friends/Relatives	360	435	+21
Business	85	108	+27
Other	30	54	+81
Total^(2,3)	727	852	+17

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 may not add to totals due to rounding
- 3) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA
- 4) Estimated based on a sample size of 51-100 appear shaded as

The estimated number of overnight trips taken in NI by NI residents has increased by 21% in the first quarter of 2013 when compared to the first quarter of 2012 and accounted for just over half (51%) of all overnight trips in NI. When NI residents are excluded, the estimated number of overnight visits to NI has increased by 13%.

Table 12 Estimated⁽¹⁾ visitor overnight trips (thousands) to NI for GB, overseas, ROI and NI Domestic markets for quarter 1 2012, 2013

	Jan-Mar 2012	Jan-Mar 2013	% Change
GB visitors ⁽²⁾⁽³⁾	189	239	+27
Overseas visitors ⁽²⁾⁽³⁾	74	69	-7
Total Overseas⁽³⁾	263	309	+17
ROI visitors ⁽⁴⁾	105	108	+3
Total visitors from outside NI⁽³⁾	369	417	+13
Domestic overnight trips ⁽⁵⁾	359	436	+21
Total⁽³⁾	727	852	+17

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) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 3) Figures may not add to totals due to rounding
- 4) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)
- 5) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

Visitors from outside NI quarter 1, 2012 to quarter 1, 2013

When NI residents are excluded, the estimated number of overnight trips increased by 13% to 417,000 in January-March 2013. Expenditure associated with these overnight trips also increased by 6% to £84 million.

Table 13 Estimated^(1,2,3) number of overnight trips, nights and expenditure in NI (excluding NI residents) for quarter 1 2012, 2013

	Jan-Mar 2012	Jan-Mar 2013	% Change
Overall Trips (000s)	369	417	+13
Overall Nights (000s)	1,842	1,869	+2
Overall Expenditure (£m)	79	84	+6

Notes:

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- 2) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA
- 3) Figures may not add to totals due to rounding

Table 14 presents the estimated number of overnight trips to NI taken by GB, ROI and overseas visitors during January-March 2013. It shows that while the estimated number of overnight trips to NI has grown by 13%, the majority of this growth (c. 75%) was seen in those visiting friends and relatives (20%). This is particularly apparent in the GB market where the number of trips increased by 27% and the number visiting friends and family showed an increase of 38%.

The first quarter estimates also suggest that overnight visits for holiday purposes increased (+11%) compared to that of quarter one in the previous year, as did overnight visits for business purposes (+11%).

However the number of overnight visits by overseas visitors (non GB based) fell by 7% in quarter one of 2013 when compared to the same period in 2012.

Table 14 Estimated^(1, 2, 3) number of overnight trips (thousands) to NI (excluding NI residents) by reason for visit for quarter 1 2012, 2013

	Jan-Mar 2012	Jan-Mar 2013	% Change
Holiday	22	28	+27
Visiting friends / relatives	114	157	+38
Business	47	49	+3
Other	5	5	-1
GB visitors⁽²⁾⁽³⁾	189	239	+27
Holiday	24	25	+4
Visiting friends / relatives	37	30	-18
Business	11	12	+11
Other	3	2	-15
Overseas visitors⁽²⁾⁽³⁾	74	69	-7
ROI Visitors⁽⁴⁾	105	108	+3
Holiday	74	82	+11
Visiting friends / relatives	211	253	+20
Business	59	66	+11
Other	24	16	-33
Total⁽³⁾	369	417	+13

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) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 3) Figures may not add to totals due to rounding
- 4) A breakdown is not available as the sample size is too small to provide reliable estimates.
- 5) Estimates based on a sample size of 30 or less appear shaded as
- 6) Estimated based on a sample size of 31-50 appear shaded as
- 7) Estimated based on a sample size of 51-100 appear shaded as

5. Hotel, Bed and breakfast, guesthouse and guest accommodation occupancy rates, April 2012 to March 2013

Occupancy rates are a useful measure to help inform the pattern of tourism by providing an indication of the use of serviced accommodation in NI. The information in this section is presented in terms of room and bed-space occupancy, and rooms and bed-spaces sold. The number of rooms and bed-spaces sold can be influenced by hotel/bed&breakfast/guest-house and guest accommodation opening and closing throughout the year and can change monthly if parts of the serviced accommodation are closed, for example, for refurbishment.

Between April 2011- March 2012 and April 2012-March 2013, hotel room occupancy increased by 5 percentage point to 65%, while bed-space occupancy increased by 4 percentage points to 46%. There were also increases in the number of rooms sold (8%) and bed-spaces sold (9%) over the same period (Table 15).

Table 15 Hotel Occupancy for the 12 months to March 2012, 2013

	Room Occupancy	Bed-space Occupancy	Rooms Sold	Bed-spaces sold
2011/12	59%	42%	1,661,200	2,594,200
2012/13	65%	46%	1,798,400	2,817,800
Change				
2011/12 – 2012/13 (+/-)	+5pps	+4pps	+8%	+9%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

The equivalent figures for guesthouses, bed & breakfasts and guest accommodation showed similar increases to those for hotels with room and bed-space occupancy increasing by 5 and 3 percentage points respectively. There was an 11% increase (to 372,000) in the number of rooms sold between April 2012–March 2013 and April 2011-March 2012. A similar increase (12%) was found in the number of bed-spaces sold over the same period.

Table 16 Bed & Breakfast, Guesthouse and Guest Accommodation occupancy, for the 12 months to March 2012, 2013

	Room Occupancy	Bed-space Occupancy	Rooms Sold	Bed-spaces sold
2011/12	29%	21%	334,700	550,400
2012/13	34%	24%	372,000	617,200
Change				
2011/2-2012/13 (+/-)*	+5pps	+3pps	+11%	+12%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

Hotel, Bed and breakfast, guesthouse and guest accommodation occupancy rates, January to March 2013

During January – March 2013, the hotel room occupancy decreased by 1 percentage point (to 50%) while bed-space occupancy at 35% showed no change on the same period in 2012. There were 350,800 hotel rooms sold in hotels in January – March 2013, a decrease of 2% on the same period in 2012. At 550,400 the number of bed-spaces sold showed an increase of 3% over January-March 2012 (Table 17).

Table 17 Hotel Occupancy for quarter 1 2012, 2013

	Room Occupancy	Bed-space Occupancy	Rooms Sold	Bed-spaces sold
2012	52%	35%	357,500	534,800
2013	50%	35%	350,800	550,400
Change 2012-2013 (+/-)	-1pps	0pps	-2%	+3%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

The room (21%) and bed-space (14%) occupancy rates of guesthouses, bed & breakfasts and guest accommodation both increased by 2 percentage points during January- March 2013 when compared to the same period in the previous year. There was a 7% increase (to 56,000) in the number of rooms sold in January –March 2013. There were 88,200 bed-spaces sold in this period which represents a 13% increase on the same period in 2012.

Table 18 Bed & Breakfasts, Guesthouses and Guest Accommodation for quarter 1 2012, 2013

	Room Occupancy	Bed-space Occupancy	Rooms Sold	Bed-spaces sold
2012	18%	12%	51,800	78,200
2013	21%	14%	56,000	88,200
Change 2012-2013 (+/-)*	+2pps	+2pps	+7%	+13%

*please note differences between years are calculated on unrounded figures and therefore percentage point change may not add back

The most recent occupancy statistics can be found at <http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-accomm-6.htm>

6. Other sources

Tourism and Leisure employee jobs (NISRA)

At March 2013, the Quarterly Employment Survey (QES) estimated that tourism and leisure industries accounted for 52,880 employee jobs in NI, 8% of all employee jobs. This proportion was unchanged from that reported in March 2012, when tourism and leisure accounted for 53,390 employee jobs in NI.

Cruise Ships (DVCB+BVCB)

During January – March 2013, there were no cruise ship arrivals in Derry or Belfast.

7. Background Notes

Trends in tourism can be tracked in a variety of ways. Demand can be assessed through visitor numbers, overnight trips and levels of expenditure.

This bulletin presents a summary of available information for Northern Ireland (NI) for the period of April 2012 to March 2013. 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% during April 2012 and March 2013), 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, 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

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).

Code of Practice

The production of those tourism statistics for which NISRA is responsible is conducted in line with the principles contained in the Code of Practice for Official Statistics <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 states that at all stages in the production and dissemination of official statistics, the public interest should prevail over organisational, political or personal interests.

The Code requires producers of official statistics to seek the views of users of their statistics. To address this, NISRA 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. A summary of responses to this consultation and proposed action by NISRA is also available on this page. 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

Sources

Information on tourism demand is collated as follows:

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, 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 daytrips taken within NI during the previous month.

Information on Tourism supply in NI is measured through:

5. A monthly census of hotel occupancy levels and monthly survey of occupancy levels in guesthouses, bed & breakfasts and other guest accommodation, both carried out by 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.

Due to the nature of sample design, confidence intervals cannot be derived for estimates from the Survey of Overseas Travellers. 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 19 Confidence Intervals Northern Ireland Continuous Household Survey April 2012 to March 2013

		95% confidence interval
Trips taken by NI residents	Trips to NI	+/-14
	Expenditure in NI	+/-21

Table 20 Confidence intervals for GB and overseas visitor estimates by country of residence April 2012 to March 2013 (Northern Ireland Passenger Survey).

Country of Residence	95 % Confidence Interval			
	Visitors	Year on year % change	Expenditure	Year on year % change
Total	+/-5%	+/- 8%	+/- 7%	+/- 10%
Great Britain	+/- 6%	+/- 9%	+/- 8%	+/- 10%
Other Europe	+/- 10%	+/- 12%	+/- 19%	+/- 21%
North America	+/- 10%	+/- 14%	+/- 25%	+/- 48%
Other Overseas	+/- 9%	+/- 16%	+/- 34%	+/- 54%

Table 21 Confidence Intervals Northern Ireland Continuous Household Survey, quarter 1 2013

		95% confidence interval
Trips taken by NI residents	Trips to NI	+/-37
	Expenditure in NI	+/-42

Table 22 Confidence intervals for GB and overseas visitor estimates by country of residence, quarter 1 2013 (Northern Ireland Passenger Survey).

Country of Residence	95 % Confidence Interval			
	Visitors	Year on year % change	Expenditure	Year on year % change
Total	+/-12%	+/- 22%	+/- 15%	+/- 21%
Great Britain	+/- 13%	+/- 26%	+/- 16%	+/- 24%
Other Europe	+/- 16%	+/- 24%	+/- 47%	+/- 60%
North America	+/- 26%	+/- 40%	+/- 53%	+/- 56%
Other Overseas	+/- 21%	+/- 19%	+/- 68%	+/- 90%

Rounding

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

Occupancy Survey

The hotel occupancy survey is a census of all hotels in NI. The Bed&Breakfasts, Guest Houses and Guest Accommodation element is a disproportionate stratified sample. This data has been weighted for non-response assuming no non-response bias and also weighted by local authority and size. More information can be found at <http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-accomm-6.htm>

Data revisions

Tourism estimates are produced to provide timely data to the tourism industry and government policy makers. The estimates may be subject to revision due to improvements to the survey / analysis methodology or the inclusion of data returned after the publication date. The figures in this document are the most up-to-date available at the time of publication.

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 visits to NI by people who live outside of that country are referred to as external visitors. Thus GB, overseas and ROI visitors are termed as external visitors.

For further information, please contact:

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ANNEX 1

Table 1 Estimated⁽¹⁾ visitor nights (thousands) spent in NI for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
GB visitors ⁽²⁾⁽³⁾	4,829	4,761	-1
Overseas visitors ⁽²⁾⁽³⁾	4,020	4,102	+2
Total Overseas⁽³⁾	8,849	8,863	0
ROI visitors ⁽⁴⁾	1,212	1,162	-4
Total visitors from outside NI⁽³⁾	10,061	10,025	0
Domestic overnight trips ⁽⁵⁾	4,783	4,080	-15
Total⁽³⁾	14,845	14,105	-5

Notes:

- 6) 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
- 7) Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 8) Figures may not add to totals due to rounding
- 9) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)
- 10) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA

Table 2 Estimated⁽¹⁾ visitor expenditure (£ million) spent in NI for the 12 months to March 2012, 2013

	Apr 2011- Mar 2012	Apr 2012- Mar 2013	% Change
GB visitors ⁽²⁾⁽³⁾	232	248	+7
Overseas visitors ⁽²⁾⁽³⁾	163	177	+9
Total Overseas⁽³⁾	395	426	+8
ROI visitors ⁽⁴⁾	58	67	+14
Total visitors from outside NI⁽³⁾	453	492	+9
Domestic overnight trips ⁽⁵⁾	179	206	+15
Total⁽³⁾	632	698	+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 Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA) and the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland
- 3) Figures may not add to totals due to rounding
- 4) Figures derived from the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO)
- 5) Figures derived from the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA