

## Northern Ireland Local Government District Tourism Statistics 2019

Published 19 November 2020

This report provides 2019 tourism statistics for the 11 Local Government Districts (LGDs) in Northern Ireland. It contains a variety of estimates including overnight trips and the associated number of nights and expenditure, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits.

The key points are:

- The largest number of **estimated overnight trips** in 2019 was to **Belfast LGD** (1.9 million). One in three (**34%**) overnight trips were to **Belfast LGD** and one in five were to **Causeway Coast & Glens (20%)**;
- **Belfast and Causeway Coast & Glens LGDs** attracted the highest relative proportion of **holiday makers**; each accounting for approximately **30%** of all holiday overnight trips in the period 2017-2019;
- An estimated 1.2 million hotel rooms were sold in **Belfast LGD** in 2019, the highest of any area. **Derry and Strabane** LGD was the second highest with an estimated 185 thousand hotel rooms sold; and
- While statistical estimates point towards an upward trend in tourism activity in Northern Ireland between 2013 and 2019. This may not be the case for each Local Government District, and all available sources should be taken together to provide a fuller picture and indication of tourism activity at LGD level.

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Coverage: Northern Ireland

Theme: People and Places

[Click here for definitions of tourism statistics common terms used in this report](#)

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## National Statistics Status

National Statistics status means that our statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

These statistics were designated as National Statistics in May 2017 following a full assessment against the Code of Practice. Since the assessment by the UK Statistics Authority, we have continued to comply with the Code of Practice for Statistics, and have also made improvements such as the following:

- Questions in both the Continuous Household Survey and Northern Ireland Passenger Survey run by NISRA are improved annually by updating based on previous responses and feedback. This reduces the burden on respondents to encourage high response rates.
- Inclusion of deflated external expenditure by CPIH
- Increasing awareness of statistics by allowing users to sign up to a [mailing list](#) that means they can be informed of any new statistical releases.



## Quality of estimates

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Two key measures of tourism activity are the number of overnight trips and the associated expenditure. To estimate these measures two sets of rolling annual sample surveys of passengers and households are undertaken:

- (i) Firstly, **surveys of passengers** at air and sea ports in Northern Ireland (NI) and the Republic of Ireland are undertaken to identify overnight trips to Northern Ireland by people living outside the island of Ireland.
- (ii) Secondly, **household surveys** in Northern Ireland and the Republic of Ireland are undertaken to identify Northern Ireland based overnight trips of Northern Ireland and Republic of Ireland residents.

**The results from sample surveys are always estimates and not precise figures.** This means that they are subject to margins of error which can have an impact on how the estimates should be interpreted, especially regarding comparisons over the short term.

It should be noted that it is possible that a person could stay in one location in NI, yet day trip in another part of NI or in the Republic of Ireland. For example, a significant number of visitors influenced to visit NI by the Giants Causeway do not stay in the Causeway Coast and Glens LGD. In this report, trips and expenditure associated with the **trips are allocated to where the person spends the night.**

The estimates presented in this bulletin (overnight trips, nights and expenditure by Local Government District) should be treated as a guide to the spread of tourism throughout Northern Ireland and **should not be used to measure annual changes for a particular LGD.** Any changes in estimates for a particular LGD are usually less than the margins of error and, as such, any short term change would not be seen as statistically significant. Estimates should not be compared over short periods of time, but rather be looked at over longer periods of time.

### What you can say....

**Belfast LGD accounted for the largest proportion of overnight trips in Northern Ireland in 2019. The estimates show the number of trips was statistically significantly higher than Causeway Coast and Glens, which had the second largest.**

### What you cannot say....

**There has been an increase in the number of overnight trips in Ards and North Down Borough Council by 21%, from 257,000 in 2018 to 312,000 in 2019.**

This report will show confidence intervals around overnight trips and aim to guide users as to how this can be best interpreted. Further information regarding confidence interval limits can be found in [background note 9](#).

## Introduction

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Northern Ireland's [annual 2019 tourism statistics](#) were published on the 22<sup>nd</sup> October 2020. Whilst tourism statistics systems are designed to collect information for Northern Ireland as a whole, the number of trips and nights are provided by location and this information has been used to disaggregate estimates by Local Government District (LGD).

Given that no single measure can be used to provide a definitive statistic on tourism, this report includes a variety of measures to paint a more complete picture.

This report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in LGDs. A primary aim is to provide information on the Programme for Government indicator aiming to increase external tourism expenditure.

Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact. In 2020, visitors may have been influenced to come to Northern Ireland by local visitor attractions, such as the Giant's Causeway and Titanic Belfast. The local film industry with 'Derry Girls' and 'Game of Thrones' showcasing local locations may also have had an impact on visits to these areas.

The report contains information for 2019 which is before the COVID-19 pandemic. Statistics for 2020 will be unavailable due to face to face surveys halting in March 2020. Users of this report should also note that the pandemic has made chasing up responses to some surveys difficult either due to businesses being closed or staff being furloughed or unavailable to return them.

**Overnight:** Headline overnight trip statistics are measured using standard United Nations (UN) definitions. The UN use the concept of "overnighting". This is broadly defined as staying away from your usual place of residence for one night or more. This does not need to be for holiday, it can also relate to visiting relatives, business etc. As well as overnighting of visitors to Northern Ireland the statistics also include overnights of local residents within NI.

Note that overnighting excludes day trips, which are a significant part of the local tourism market.

# Overnight trips by Local Government District (2019)

Figure 1a shows the estimated overnight trips taken in each LGD, including upper and lower confidence limits. Where these limits overlap between estimates, we say there is “no statistically significant difference”. This means that we cannot conclude that any difference in estimate isn’t due to chance. Further information on confidence intervals can be found on this [link](#).

- The estimates show that Belfast LGD had the highest number of overnight trips of any Local Government District during 2019 (1.9 million overnight trips). It can be seen in Figure 1a that the lowest limit of the estimate of trips to Belfast LGD (point A) is above the higher limit for any other LGD. Therefore, this is statistically significant and it can be said that Belfast LGD has the highest number of overnight trips of all LGDs in Northern Ireland.
- Similarly, Causeway Coast & Glens LGD has a higher lower limit (point B) than the upper limits of those LGDs with fewer overnight trips.

Figure 1b on the next page shows the estimated overnight trips in a thematic map.

Figure 1a: Estimated overnight trips by LGD 2019

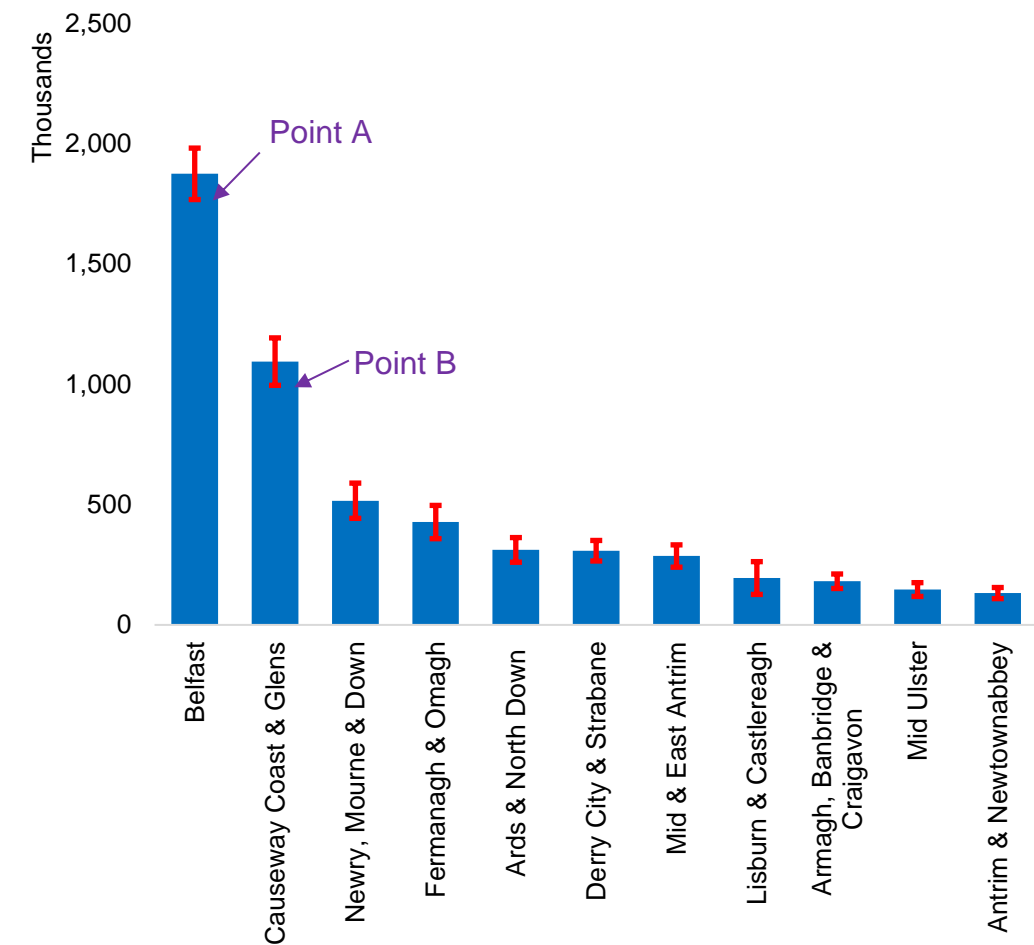
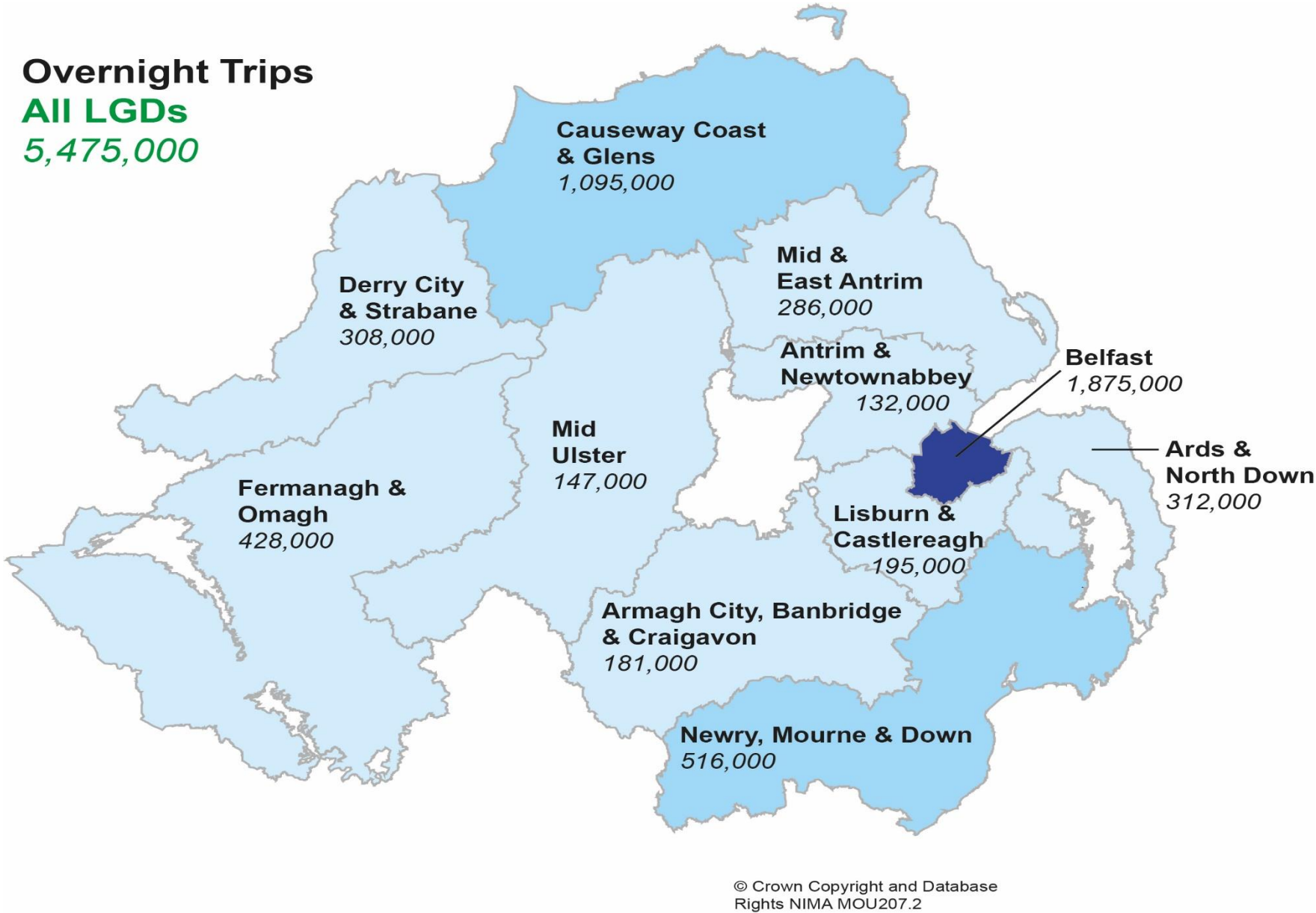


Figure 1b: Map of estimated overnight trips<sup>1</sup> by LGD, 2019



<sup>Note</sup> All LGDs: This figure (5.5 million) is higher than the Northern Ireland total (5.3 million) – See [background note 5](#).

## Expenditure on overnight trips by Local Government District (2019)

Figure 2a shows the estimated expenditure associated with overnight trips taken in each Local Government District (2019). This data is also shown in thematic map form in Figure 2b on the next page.

- As would be expected, this picture broadly follows the pattern of estimated number of overnight trips. In total £1 billion was spent on overnight trips across Northern Ireland, with £417 million or 40% spent by visitors who stayed in Belfast LGD.
- An estimated further £192 million (18%) was spent by visitors who stayed in Causeway Coast & Glens LGD.

It should be noted that spend is fully allocated to the LGD where a visitor stayed overnight. In reality the trip may also include a day trip (and associated spending) in another LGD.

**Figure 2a: Estimated expenditure (£m) on Overnight Trips by Local Government District, 2019**

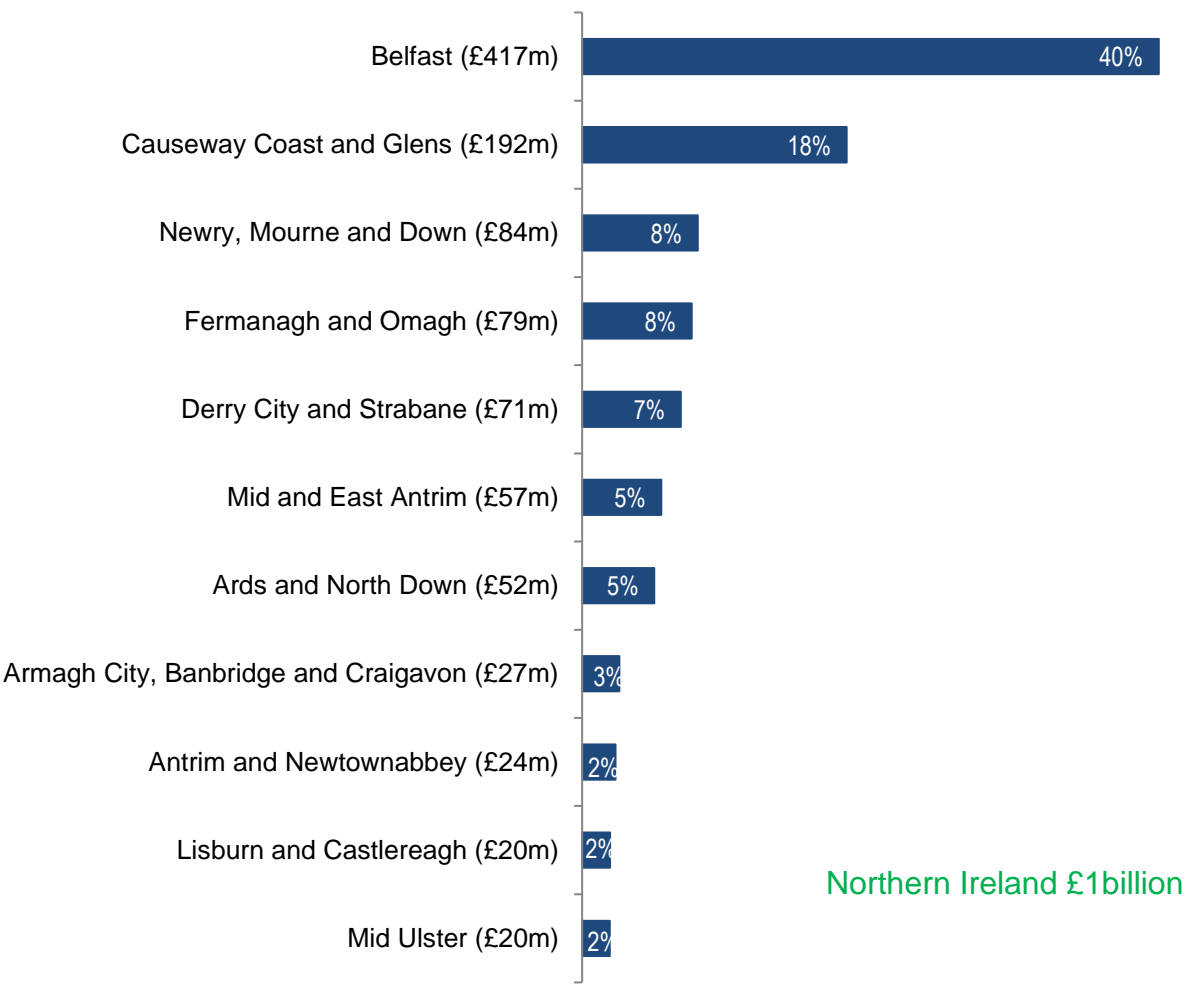
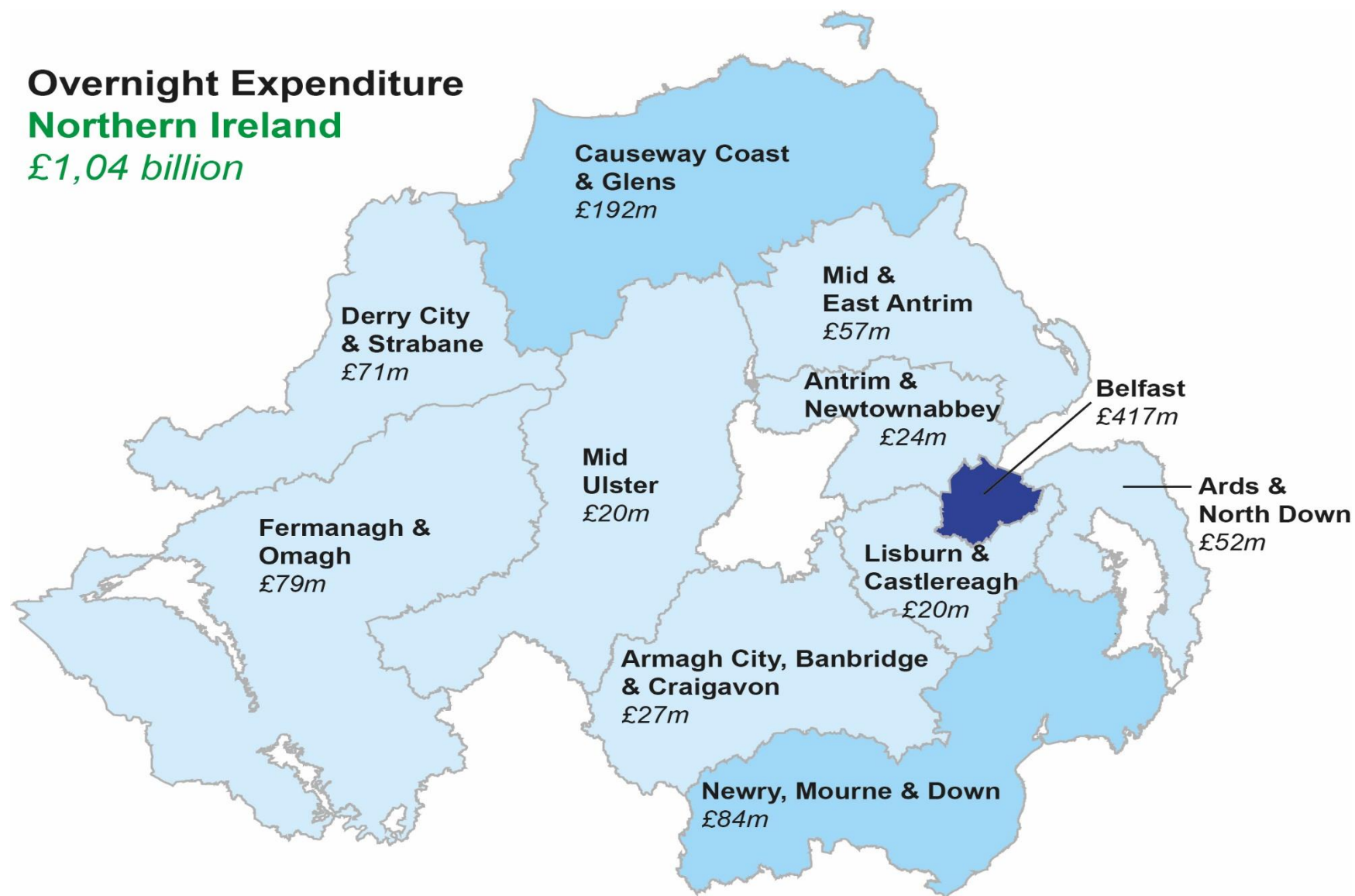




Figure 2b: Map of estimated expenditure (£m) on overnight trips by LGD, 2019





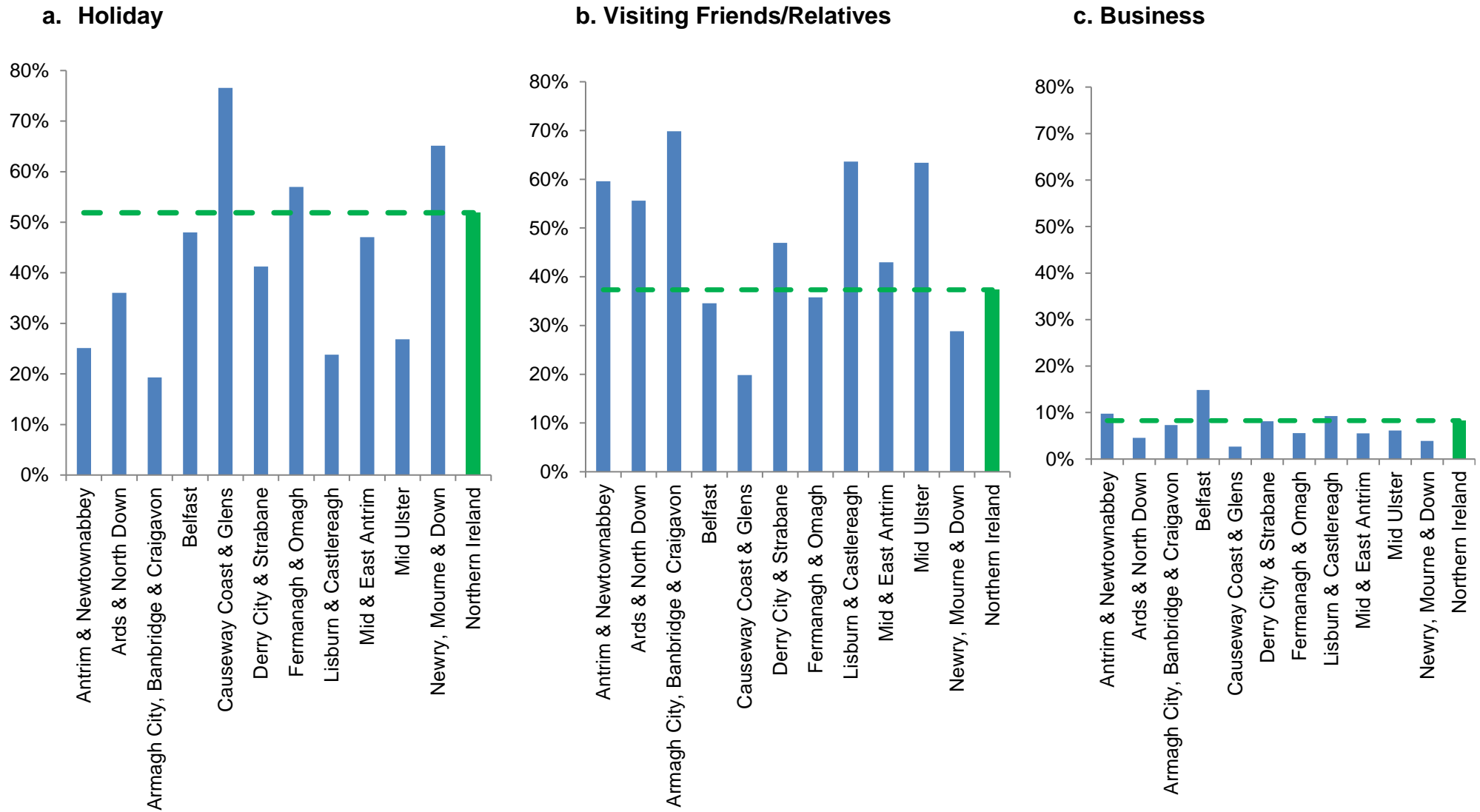
## Reason for overnight trips by Local Government District (2017-2019)

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Survey respondents are also asked the reason they stayed overnight in Northern Ireland. The estimates for all overnight trips (from both domestic and external visitors) are shown in Figures 3. Users should note that these estimates are provided using a three year average as annual sample sizes are not sufficient to produce robust estimates based on a single year. The three year average provides an indication of the pattern of reason for visit for each LGD and should not be used as a basis for making comparisons over short time periods.

- In overall terms the chart shows the relative importance of each sector. Estimates suggest overnight trips for holiday purposes makes up 52% of the Northern Ireland market, visiting friends and relatives 37% and business trips 8%. However, there is significant local variation.
- Figure 3 shows the estimated proportion of overnight trips in each local area that were taken for holiday/pleasure/leisure purposes. The relative importance of holiday tourism is particularly prominent in certain areas. Over the period 2017-2019, over three out of every four estimated overnight trips taken in Causeway Coast & Glens LGD (77%) were for holiday purposes. Around two thirds of estimated overnight trips in Newry, Mourne & Down LGD were for holiday purposes (65%).
- Figure 3 shows that Belfast City Council has a significant pull for business trips (15%) which is the highest proportion across all LGDs. Indeed, of all those people taking an overnight business trip in Northern Ireland, almost three fifths (58%) stayed in Belfast LGD.

**Figure 3: Proportion of visitors in Local Government district by reason for visit (rolling average 2017-2019)**

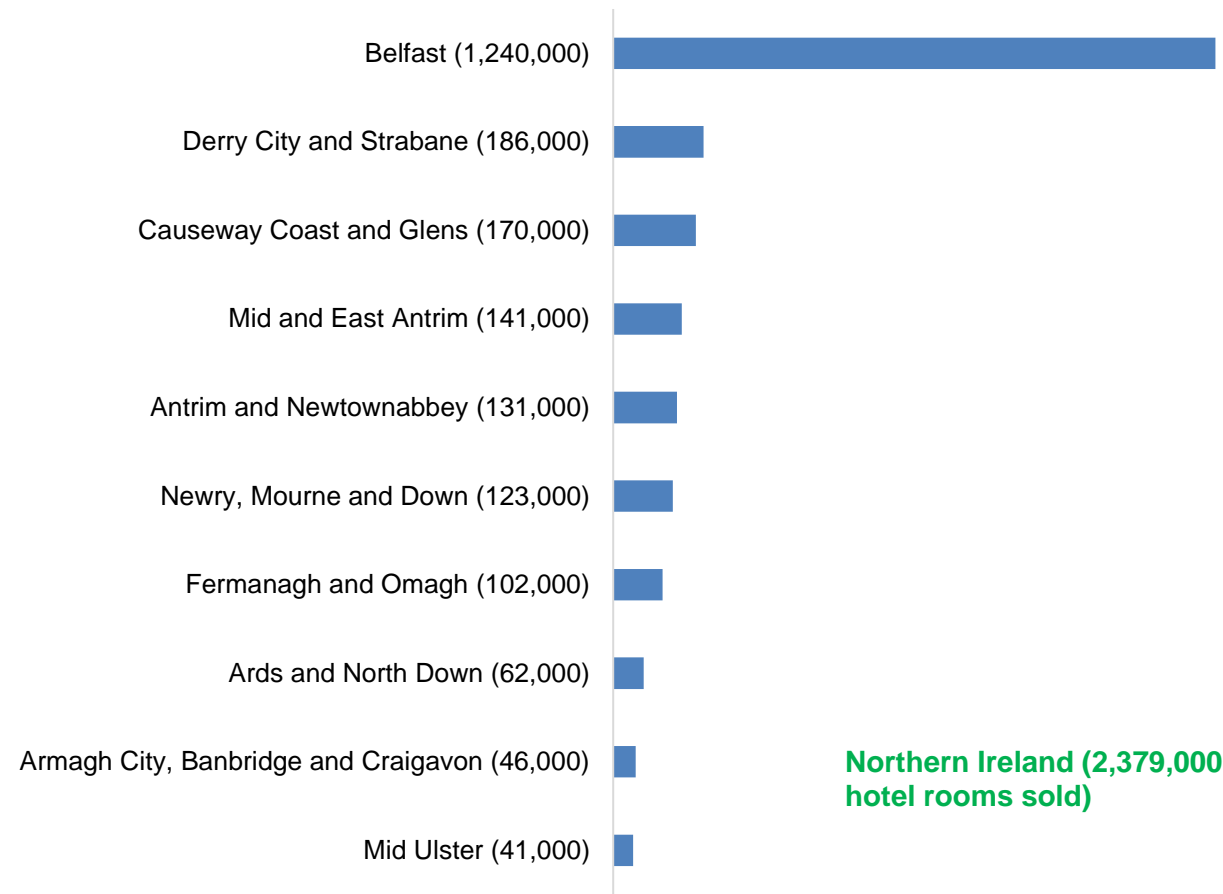


# Hotel accommodation by Local Government District, 2019

NISRA conducts a monthly occupancy survey of local hotels. The number of room nights sold in hotel accommodation is seen as a good indicator of how tourism is performing in Northern Ireland, and can be broken out by Local Government District.

- Figures for Northern Ireland in 2019 show that the estimated number of hotel room nights sold was 2.4 million, this total is broken out by LGD in Figure 4.
- In Northern Ireland two thirds (67%) of all hotel rooms were occupied
- Estimates show that over half of hotel room nights sold (52%) in Northern Ireland are in Belfast LGD.

Figure 4: Annual number of rooms sold in hotel accommodation by LGD, 2019



\*sample size for Lisburn & Castlereagh LGD was too small to provide a reliable estimate

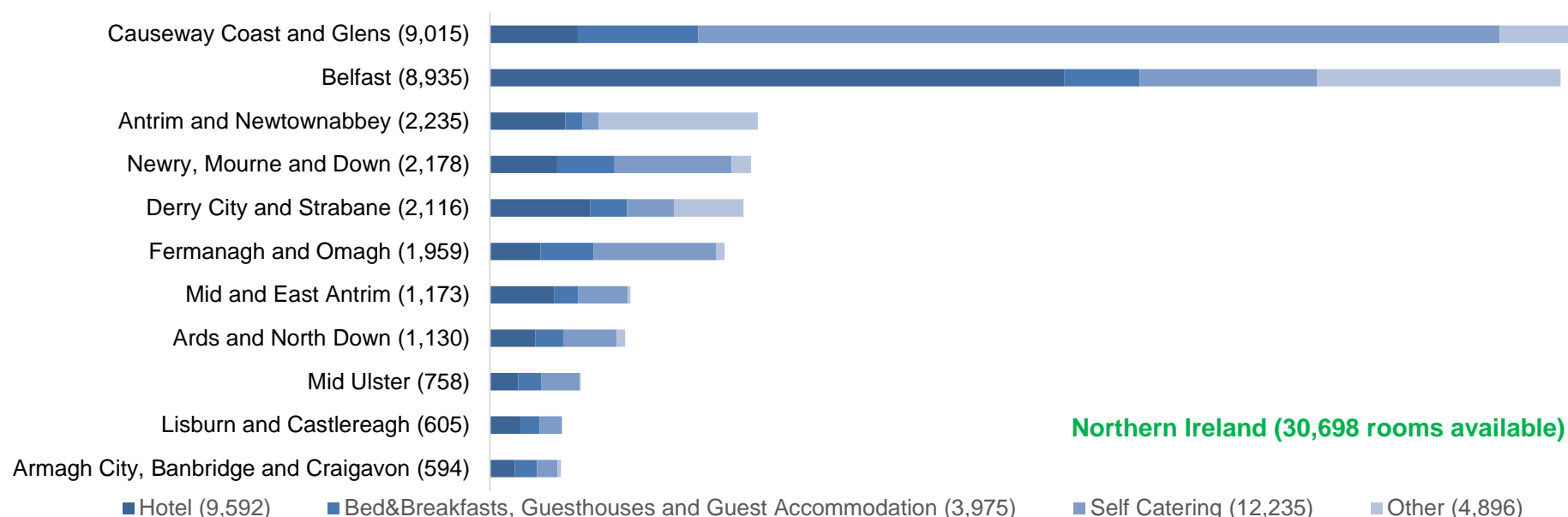
## Other accommodation statistics (official statistics) by Local Government District, 2019

### Accommodation availability

The availability of accommodation also can give an indication of the supply side of the tourism industry. NISRA receives data on accommodation stock from Tourism Northern Ireland (TNI) which shows the number of rooms in licenced accommodation for each LGD. These include hotels, guesthouses, bed & breakfasts, guest accommodation, self-catering and “other” accommodation (e.g. hostels, campus and bunkhouse rooms). Users should note that stock varies over the year as some establishments close during winter months or work is done on some rooms.

- Almost three fifths (58%) of all rooms in licensed accommodation in Northern Ireland are in two LGDs – Causeway Coast and Glens (29%) and Belfast (29%). However, the makeup of the types of rooms available differs between LGD.
- Belfast LGD has the largest number of hotel rooms (4,791 rooms, 50% of the Northern Ireland total).
- Causeway Coast & Glens LGD having the largest number of self-catering rooms (6,688 rooms, 55% of all self-catering rooms in NI). This area also has the most Bed & Breakfasts (673 rooms, 33% of all NI) and Guesthouses (185 rooms, 27% of all NI).

**Figure 5: Number of rooms by type in licensed accommodation by Local Government District, 2019**



## **Other accommodation occupancy surveys**

To provide a further picture of tourism, NISRA also conducts monthly occupancy surveys of Guest Houses, Bed & Breakfasts and Guest Accommodation establishments as well as annual occupancy surveys of Self Catering establishments. Users should note that response rates to these surveys are low and varied so should be treated with caution. Results from these surveys are classed as Official Statistics, further information on [Official Statistics](#) can be found on the [NISRA website](#).

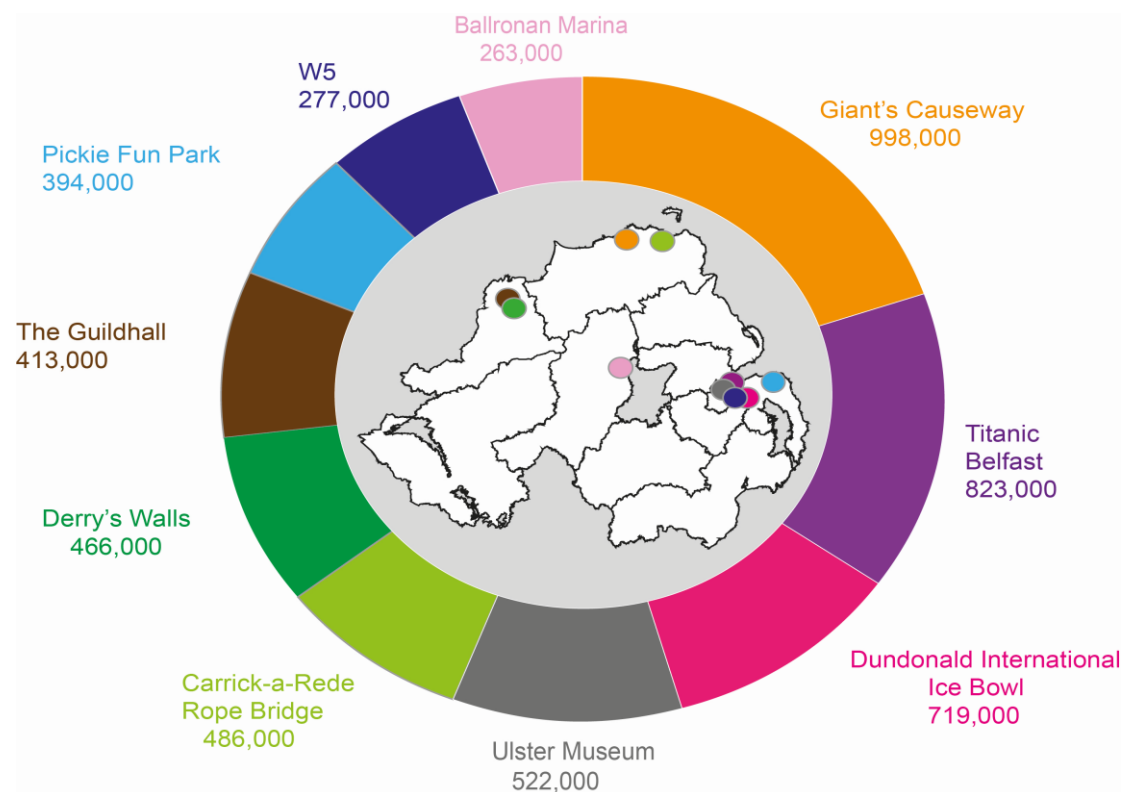
- During 2019, it is estimated that Guest House, Bed & Breakfast and Guest Accommodation had average room occupancy of 33% in NI-with the highest in Belfast LGD (51%) and that Self Catering Accommodation had average unit occupancy of 31% across NI-with the highest in Fermanagh and Omagh (41%).
- These occupancy rates will vary in each LGD, but estimates from these surveys are based on low and varied response rates and should be treated with caution. Occupancy in Local Government Districts can also be subject to fluctuations due to local one off events, weather and other factors such as exchange rates.

## Visitor attractions in Northern Ireland (official statistics)

NISRA performs an annual survey of all visitor attractions in Northern Ireland. Visitor attractions across Northern Ireland provide information on the number of people who visit their attractions throughout the year. Counting methods for individual attractions differ and may also change year on year which may impact on these results – more information can be found in the [Visitor Attraction Survey](#) satellite report.

- During 2019, the top visitor attractions were the **Giant's Causeway** (1.0 million visits), **Titanic Belfast** (0.8 million), the **Dundonald International Ice Bowl** (0.7 million) and **Ulster Museum** (0.5 million). This is shown in graphical form in Figure 6.
- Users should note that the lists of visitor attractions included in the report only include those that choose to participate and make their results public. The 2019 Visitor Attraction Survey had a lower response rate than previous years which may be due to COVID-19 and some businesses remaining closed or the relevant person to fill in the survey being furloughed.

Figure 6: Top 10 visitor attractions\* in 2019



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\*excludes country parks/parks/forests/gardens

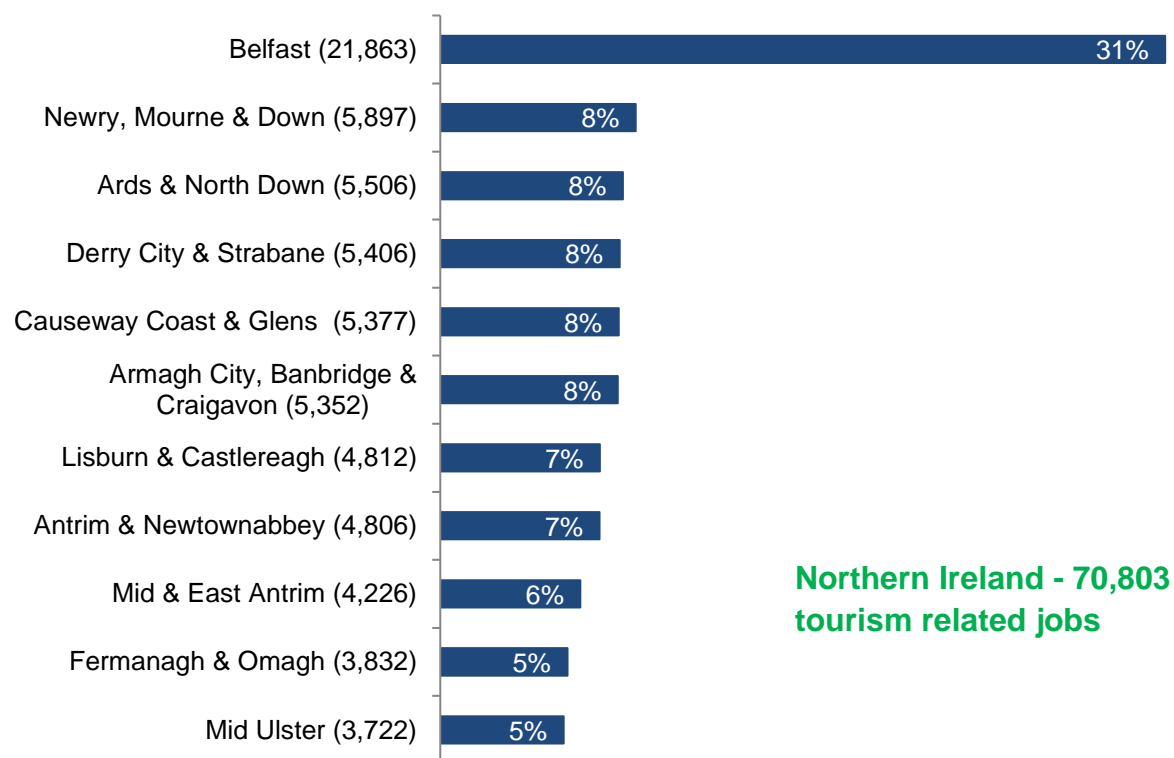


## Employment in tourism characteristic industries by LGD (2019)

- Employee jobs in tourism characteristic industries relates to a number of different business areas, most notably hotels and restaurants. Figure 7 gives an indication on the number of employee jobs in tourism characteristic industries in each local area and proportion of all in NI.
- In total, in 2019 there were an estimated 774,000 employee jobs in Northern Ireland, of which 71,000 (9%) are in tourism characteristic industries. Almost two thirds (56%) of tourism related jobs in Northern Ireland were part time.
- Belfast LGD accounts for 31% of all tourism related jobs across Northern Ireland.
- When looking at the relative importance of the tourism industry

within local areas, local employment in the tourism industry is highest in Ards & North Down (14%) and Causeway Coast & Glens (13%) LGDs.

**Figure 7: Employee jobs in tourism characteristic industries by Local Government District 2019**



\*Source: Business Register and Employment Survey (BRES) 2019

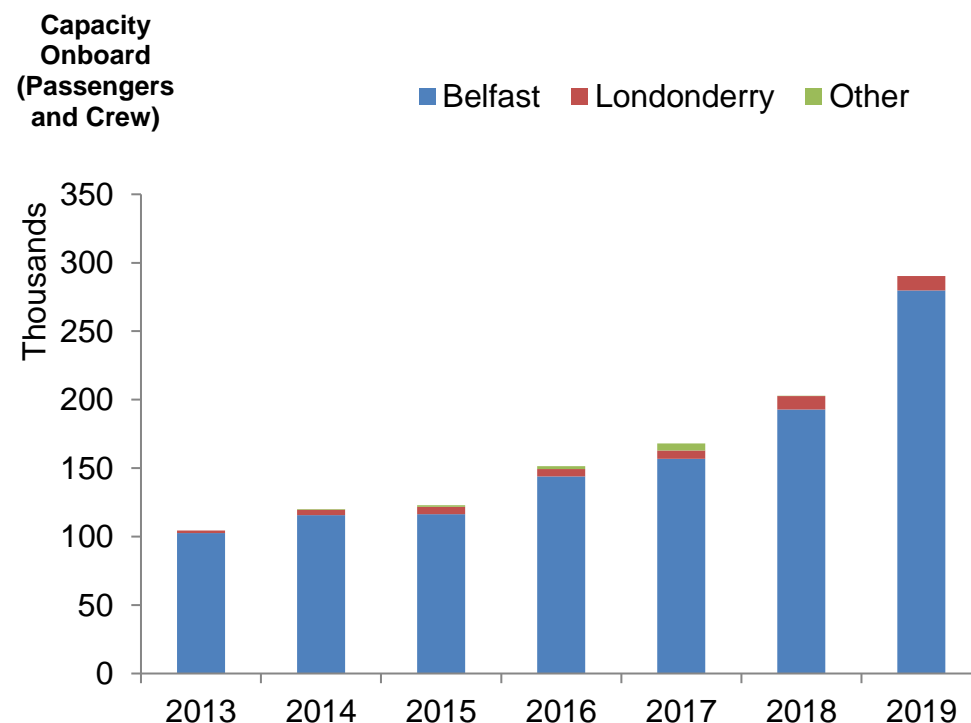
## Cruise ship visits by harbour (2013-2019)

Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 8 shows the trend in the number of cruise ships docking at local ports – see background note 11.

- In 2019, 149 cruise ships docked in Belfast port and another 18 in Londonderry port.
- There was an increase of 178% in capacity of cruise ships docked in Northern Ireland, up from 104,000 passengers and crew in 2013 to 290,000 in 2019.

Many cruise ship passengers will go on trips to other areas (for example from Belfast to the Giant's Causeway). These passengers may be captured in the Visitor Attraction Survey figures. However there are no figures available on how many disembark the ships or where they may spend the day while visiting NI.

**Figure 8: Total capacity of passengers and crew on board cruise ships docking at NI ports (2013-2019)**



## Background notes

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1. This report presents a summary of 2019 tourism statistics by Local Government Districts (LGD). More detailed data are available at this [link](#). It should be noted that this publication uses data collected before the onset of the COVID-19 pandemic. Since then, COVID-19 has impacted all face to face interviews and they stopped on the 17<sup>th</sup> March 2020. The pandemic also saw the closure of much of the hospitality sector. This has impacted on response rates to all “supply” tourism surveys (occupancy surveys, self-catering and visitors attractions) as establishments have been closed with no way to contact and chase up responses to the 2019 surveys.

The next tourism statistics release is usually for all NI for the year up to March 2020. As a result of the COVID-19 impact, NISRA’s next published tourism figures will be released in December 2020 and will cover only the period up to 17<sup>th</sup> March with a suspended National Statistics badge (see background note 3). Users of the LGD report should recognise that there is unlikely to be any data for 2020. NISRA are currently exploring alternative sources but it is unlikely to have anything for geographical areas lower than NI. NISRA will keep users informed.

2. Tourism data is derived from a variety of sources, more information on these sources can also be found at this [link](#). Tourism estimates are designed to provide timely data on tourism activity in Northern Ireland. The estimates may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures in this document are the most up-to-date available at the time of publication. Northern Ireland Tourism statistics have undergone a series of organisational changes and revisions to methodology. Information on the sources, the data quality of each source and any revisions or changes in methodology can be accessed at this [link](#).
3. The production of tourism statistics is conducted in line with the UK Statistics Authority [Code of Practice for Official Statistics](#). This means that the statistics
  - a. meet identified user needs,
  - b. are well explained and readily accessible,

- c. are produced according to sound methods, and
  - d. are managed impartially and objectively in the public interest
4. NISRA uses the Survey of Overseas Travellers run by Fáilte Ireland to gain information on the visitors who took overnight trips in Northern Ireland and exited through Republic of Ireland ports. Information on Northern Ireland overnight trips is also now collected through a separate survey carried out by Central Statistics Office Ireland. NISRA researched the two sources and presented and agreed the findings at the All-Ireland tourism statistics meeting with all relevant providers and users of the data. The findings can be accessed at [link](#). By way of an update, CSO have informed NISRA that they did begin to trial face to face data collection in the Passenger Card Inquiry at the start of 2020, however due to COVID this has stopped again from March 2020. This trial had only started in one port so will not provide enough of a sample to explore this at this stage.
  5. The 2019 Northern Ireland tourism statistics showed there were 5.3 million overnight trips, this figure is lower than the 'all LGD' total (5.5 million). The LGD figure is higher due to how the NI passenger survey is conducted as an external visitor may report overnight stays in various locations during the one overnight trip to NI. For example, if someone stayed two nights in Belfast followed by three nights in the Causeway Coast and Glens, this would be counted as one trip to Northern Ireland in the annual estimates and one trip to Belfast and one to Causeway Coast and Glens (two trips) in the LGD breakdown.
  6. NISRA uses the Northern Ireland Passenger Survey to apportion the Survey of Overseas Travellers by Local Government District. Similarly, it uses the Continuous Household Survey to apportion the Household Travel Survey results (the HTS is carried out by Central Statistics Office to gather information on Republic of Ireland residents who overnight in Northern Ireland). The Reason for Visit results for each of these sources was applied to each of these LGD estimates.
  7. Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on overnight trips in Northern Ireland of Northern Ireland residents aged under 16 are excluded. NISRA has increased the sample size of the underlying survey used to measure domestic tourism from April 2017.

8. While the statistics are produced in as timely a way as possible, it is recognised that early indicators would be useful. Early tourism indicators are published at this [link](#) and are updated monthly.
9. The estimates on visitor numbers, nights and spend 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. Confidence intervals around the estimates of all overnight trips in Northern Ireland in 2018 stands at +/- 4% for the year (associated expenditure at +/- 6%). Note: based on the survey design confidence intervals for domestic tourism trips stands at +/-7% and external trips at +/-4%. Information on confidence intervals in Northern Ireland tourism statistics can be accessed at this [link](#).
10. This report includes estimates from the Business Register and Employment Survey (BRES) on the number of jobs in 'tourism characteristic industries'. The latest tourism characteristic industries breakdown available is for 2019 as the BRES sample size is rotated on a 4 year basis. There is only a sufficient sample to produce these estimates every two years. More information on the BRES and the associated methodology can be accessed at this [link](#).
11. The vast majority of cruise ships visit Northern Ireland on a single day basis, docking in the morning and then leaving in the evening. Thus under UN definitions cruise ship visits are considered day-trips and excluded from the overnight trips figures outlined in section 1. To address this, statistics from [Visit Belfast](#), [Cruise North West](#) and Newry & Mourne Council relating to Warrenpoint port are included. Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (Bangor & Portrush)-these figures have been included using information from Quay Marinas (Bangor) and Causeway Coast & Glens (Portrush).
12. Data from the 2018 and 2019 Household Travel Survey (HTS), provided by Central Statistics Office (CSO), relating to the number of visitors coming to Northern Ireland from the Republic of Ireland (ROI), should be considered as interim data that may be subject to future revision. They are based on a statistical adjustment of the data which began in 2018, and therefore may be subject to revision in the future. For more information on this adjustment, please refer to the Methodology Note on Review of Household Travel Survey 2018 at this link. NISRA have assessed that the quality of this data is comparable to the historic series.

13. The HTS data for 2016 was revised for the 2017 publication due to a weighting revision. This caused minimal change which was less than 1%.

14. Full information on the revision of tourism statistics can be found at [Tourism Statistics Branch Revision Policy](#).

A quality report on Tourism Statistics can be found at this [link](#).

15. Follow NISRA on [Twitter](#) and [Facebook](#).

16. NISRA plan to hold a Tourism Statistics User Group session at the beginning of 2021 to discuss 2020 tourism statistics, the impact of COVID-19 on tourism, alternative sources of tourism statistics, the development of an Index of Tourism and Day trips. If you would like to be kept informed, please contact us on the below details.

**At time of publication, staff are working from home, it would be quicker to email any queries.**

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