

## Northern Ireland Local Government District Tourism Statistics 2014

Published 30 July 2015

This report provides 2014 tourism statistics for the 11 Local Government Districts (LGDs) in Northern Ireland. A number of statistics; overnight trips, rooms sold in commercial accommodation, visitor attraction visits, tourism employment and cruise ship visits are included. The key points are:

- the **largest number** of overnight trips in 2014 was to **Belfast** LGD (1.2 million). One in four overnight trips to Northern Ireland was to this area (25% of all overnight trips);
- in 2014, **Causeway Coast & Glens** LGD accounted for 0.8 million overnight trips. This area is the most popular in Northern Ireland on a **per capita basis**, with 5.3 overnight trips per head of local population;
- reason for visit varies by area. Three out of five overnight trips to **Causeway Coast & Glens** LGD were for **holiday** purposes (60%). In contrast, 16% overnight trips to **Belfast** LGD were for **business** reasons;
- **Belfast** LGD has the largest number of beds in **hotel** accommodation (7,000 beds or 40% of NI total) on average **half** of these beds were fully **occupied** throughout 2014 (51% occupancy level);
- the importance of **self-catering** accommodation in **Causeway Coast & Glens** and **Fermanagh & Omagh** LGDs is clear. There are over 7,500 self-catering beds (63%) in these two LGDs out of 12,000 self-catering beds in Northern Ireland as a whole;
- last year, the most **popular visitor attractions** included the **Giant's Causeway** (0.79 million visits), **Titanic Belfast** (0.63 million visits) and the **Ulster Museum** (0.47 million visits).

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Northern Ireland

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## Introduction

Northern Ireland [annual 2014 tourism statistics](#) were published on the 28<sup>th</sup> May. Tourism statistics systems are designed to collect information for Northern Ireland as a whole, however the number of trips and nights are provided by location and this information has been used to disaggregate by Local Government District (LGD). It is possible that a person could stay in one location in NI, yet day trip in another part of NI or in the Irish Republic. 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. For the purpose of this report, trips and expenditure associated with the trip are allocated to where the person spends the night. 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 progress towards the Programme for Government target aimed directly at tourism. (See [background note 3](#)).

Tourism can be influenced by a number of factors. Alongside initiatives from government and tourism agencies, events and trends can have an impact. In 2014, NI hosted world sporting events such as the opening stages of the Giro D'Italia and Carl Frampton's World Title Boxing Fight at the Titanic Quarter. Local film industries, such as the Game of Thrones showcased local locations and may also have had an impact on visits to these areas.

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 surveys of passengers and households are undertaken.

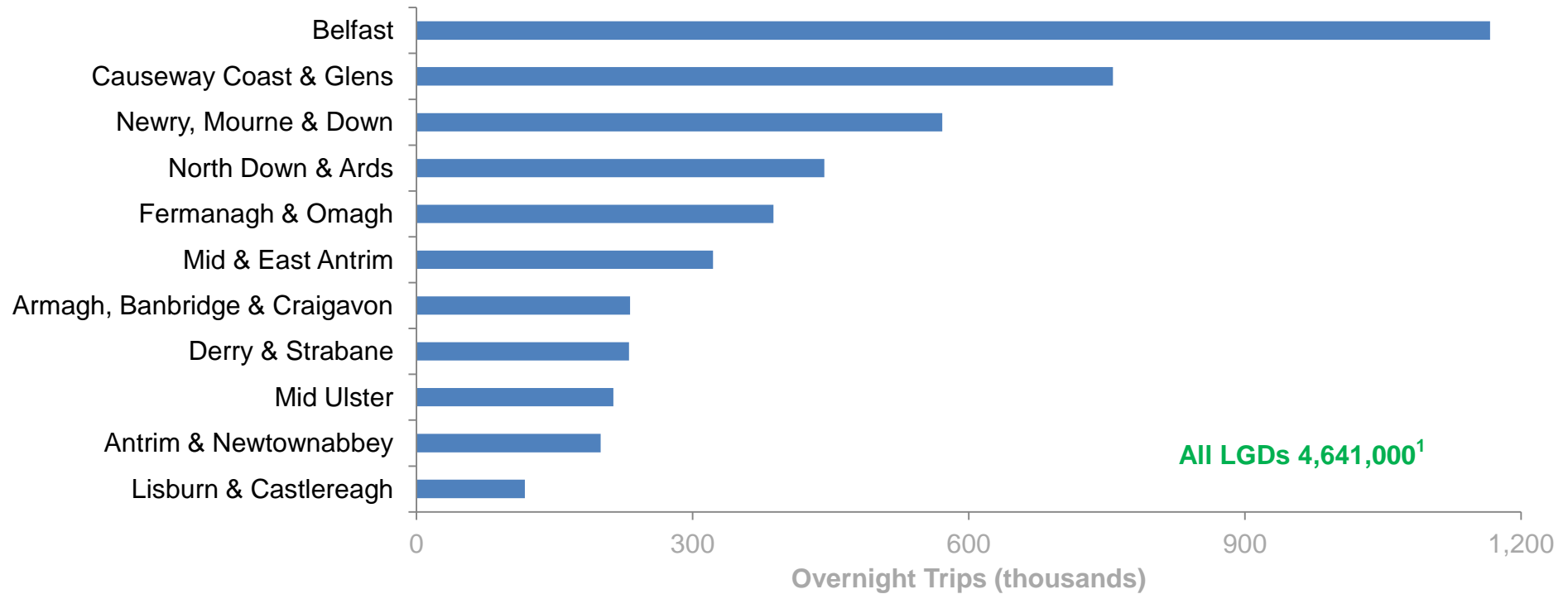
- (i) Firstly, **surveys of passengers** at air and sea ports in Northern Ireland and the Republic of Ireland are undertaken to identify overnight trips to Northern Ireland by people living outside the island of Ireland.
- (ii) Secondly **household surveys** in Northern Ireland and the Republic of Ireland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

**Overnight:** Headline overnight trip statistics are measured using standard 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 overnighting excludes day trips, which will be a significant part of the local tourism market.

**Overall volume / latest trend**

- Figure 1a shows the overnight trips taken in each Local Government District and Figure 1b shows the same information by thematic map.
- Belfast experienced the highest number of overnight trips of any Local Government District during 2014, (1.2 million overnight trips or 25% of all overnight trips).

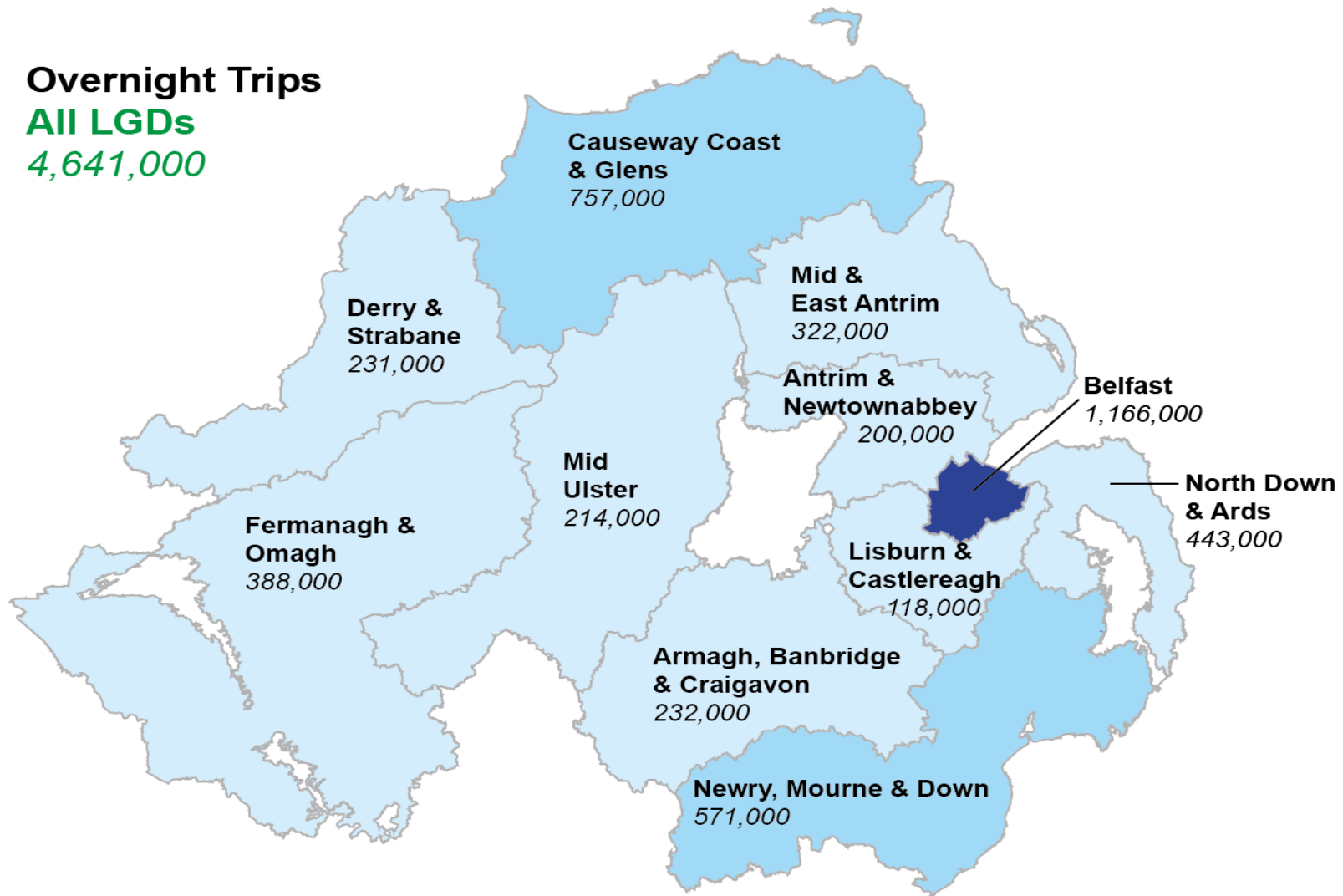
**Figure 1a: Overnight Trips by Local Government District (thousands), 2014**



<sup>1</sup>All LGDs: This figure (4.6 million) is higher than the Northern Ireland total (4.5million) – see [background note 5](#).

See [link](#) for data

Figure 1b: Map of 2014 overnight trips by Local Government District



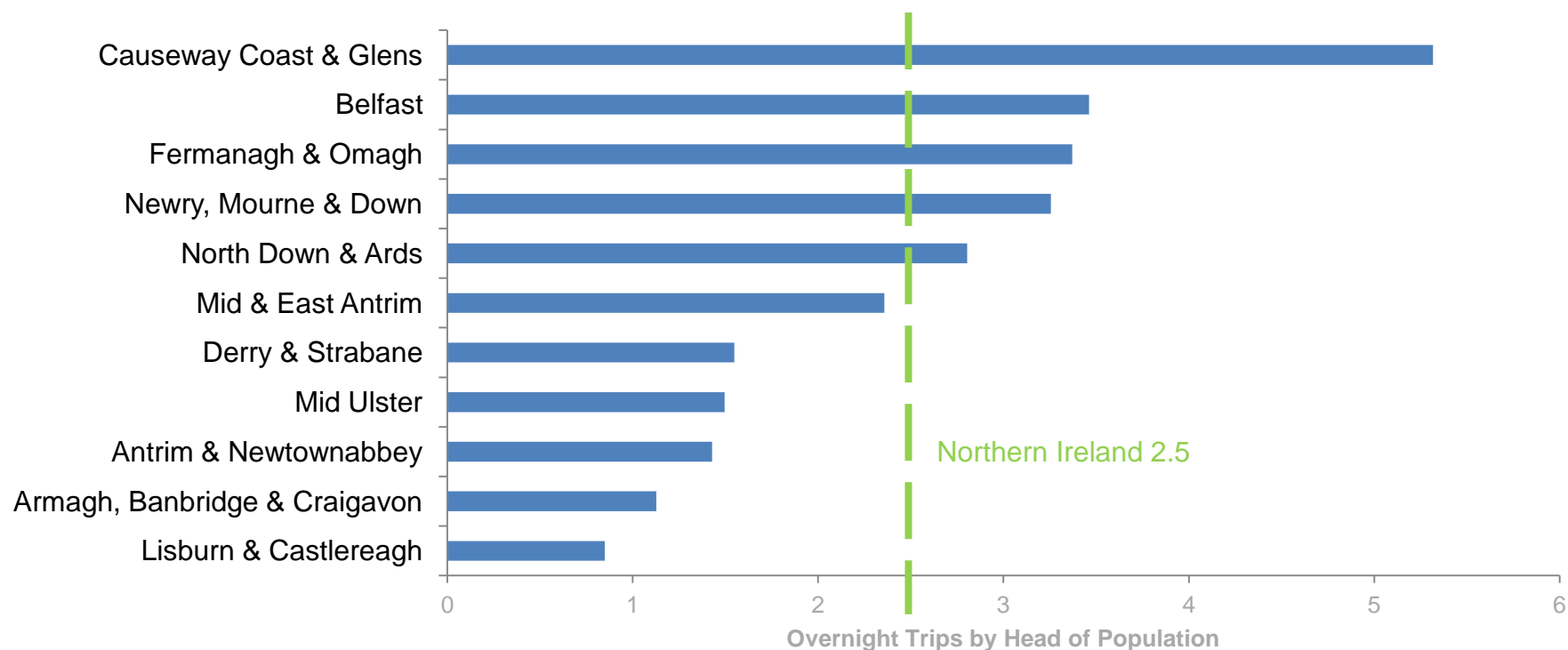
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<sup>1</sup>See background note 5.

See [link](#) for data

- Areas can be attractive for a variety of reasons including natural features, tourism attractions or the opportunity to visit family or friends. Therefore, amongst other things the population size of the area impacts on the number of overnight trips. To allow for this, the number of overnight trips can be compared to the local population to give the number of trips per head of population. In 2014, there were 2.5 overnight trips per head of the Northern Ireland population. This is shown in Figure 2a and in thematic map form in Figure 2b.

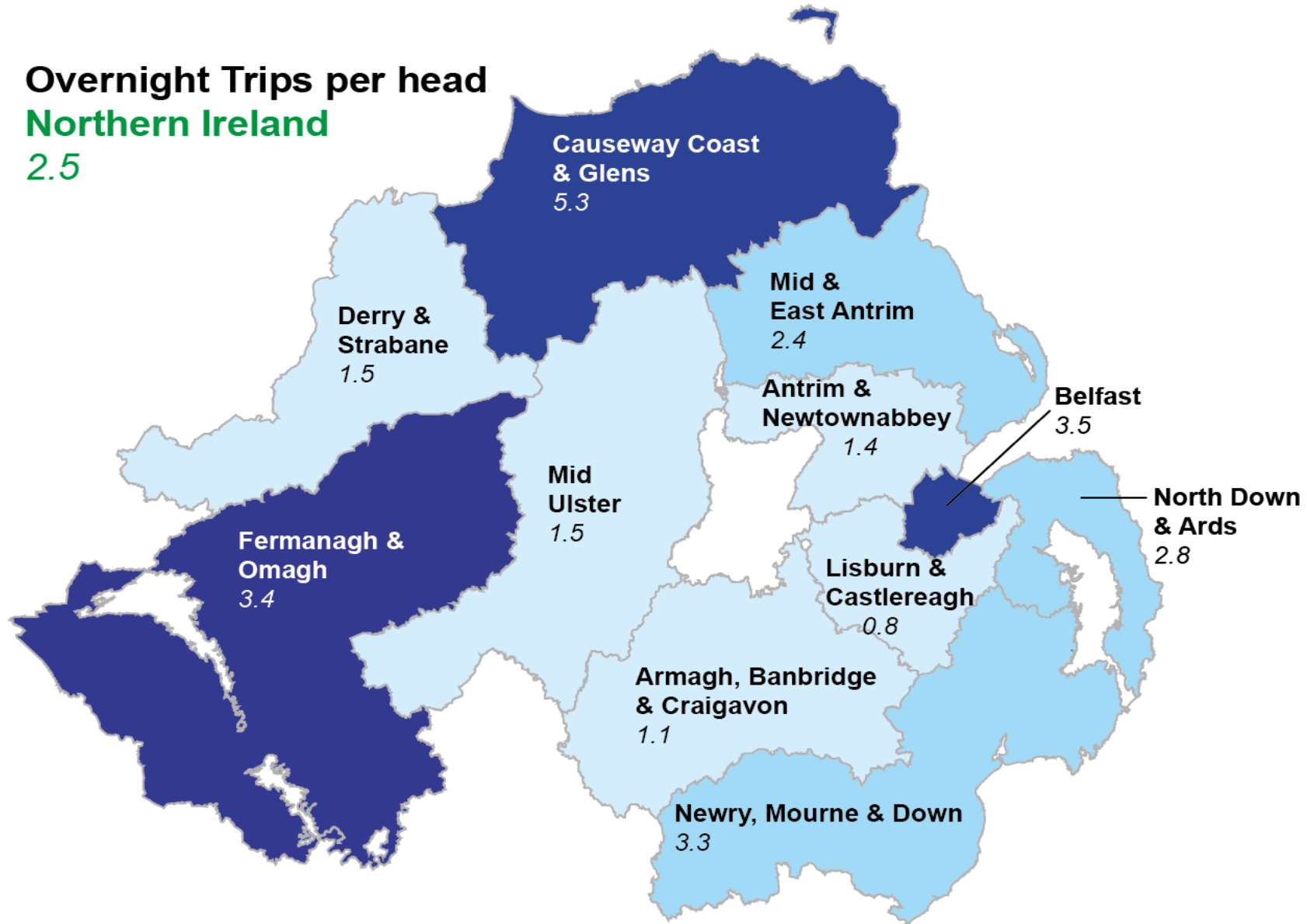
**Figure 2a: Overnight Trips per head of local population (2014)**



See [link](#) for data

- The Causeway Coast and Glens showed the highest number of overnight trips per head of the population, with 5.3 visits per head of local population. Belfast; Fermanagh & Omagh and Newry, Mourne & Down all had over 3 visits per head of the population (Figure 2a). In contrast, Lisburn & Castlereagh and Armagh, Banbridge & Craigavon had around 1 visit per head of local population.

Figure 2b: Map of 2014 overnight trips per head of population by Local Government District



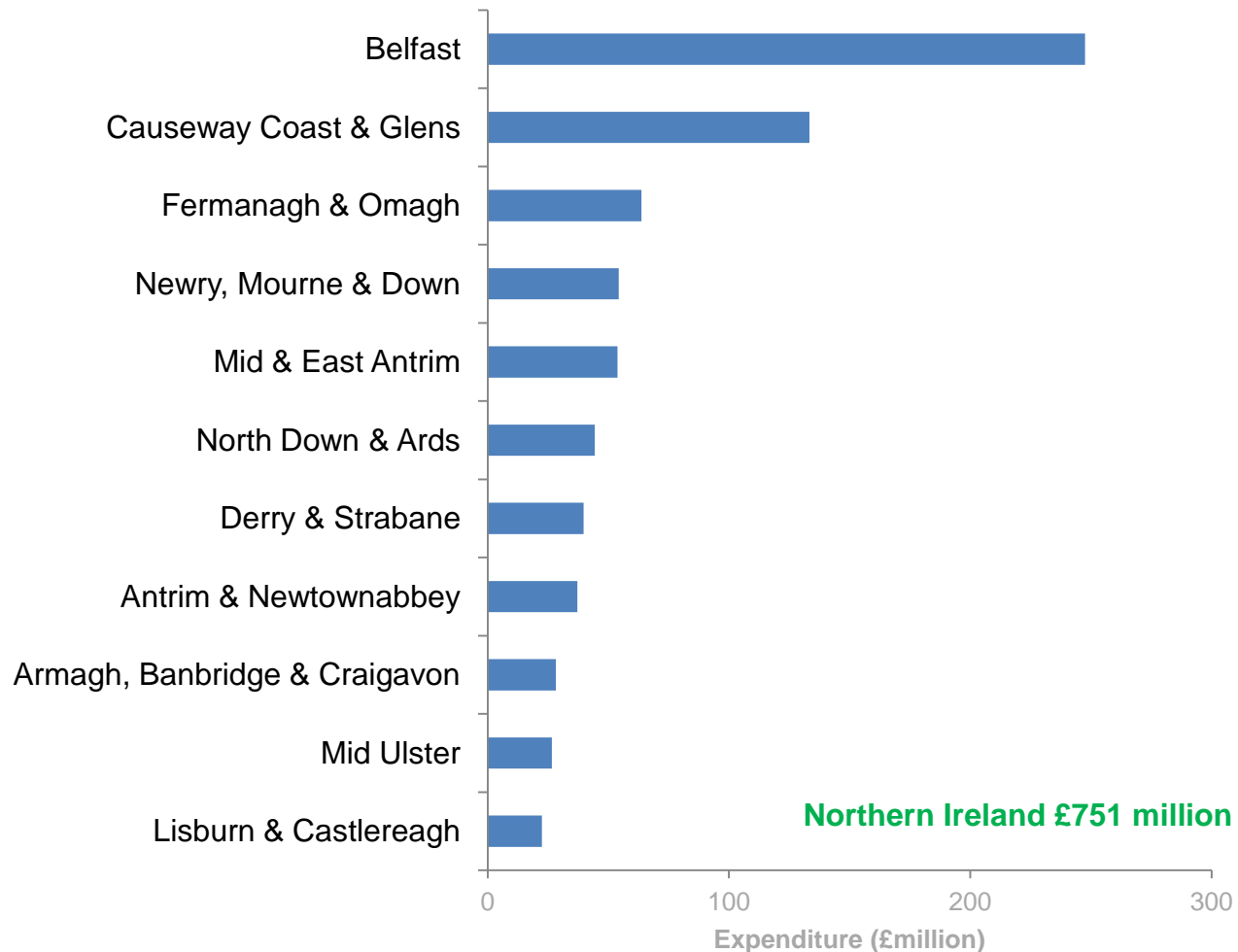
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**Expenditure associated with Overnight Trips**

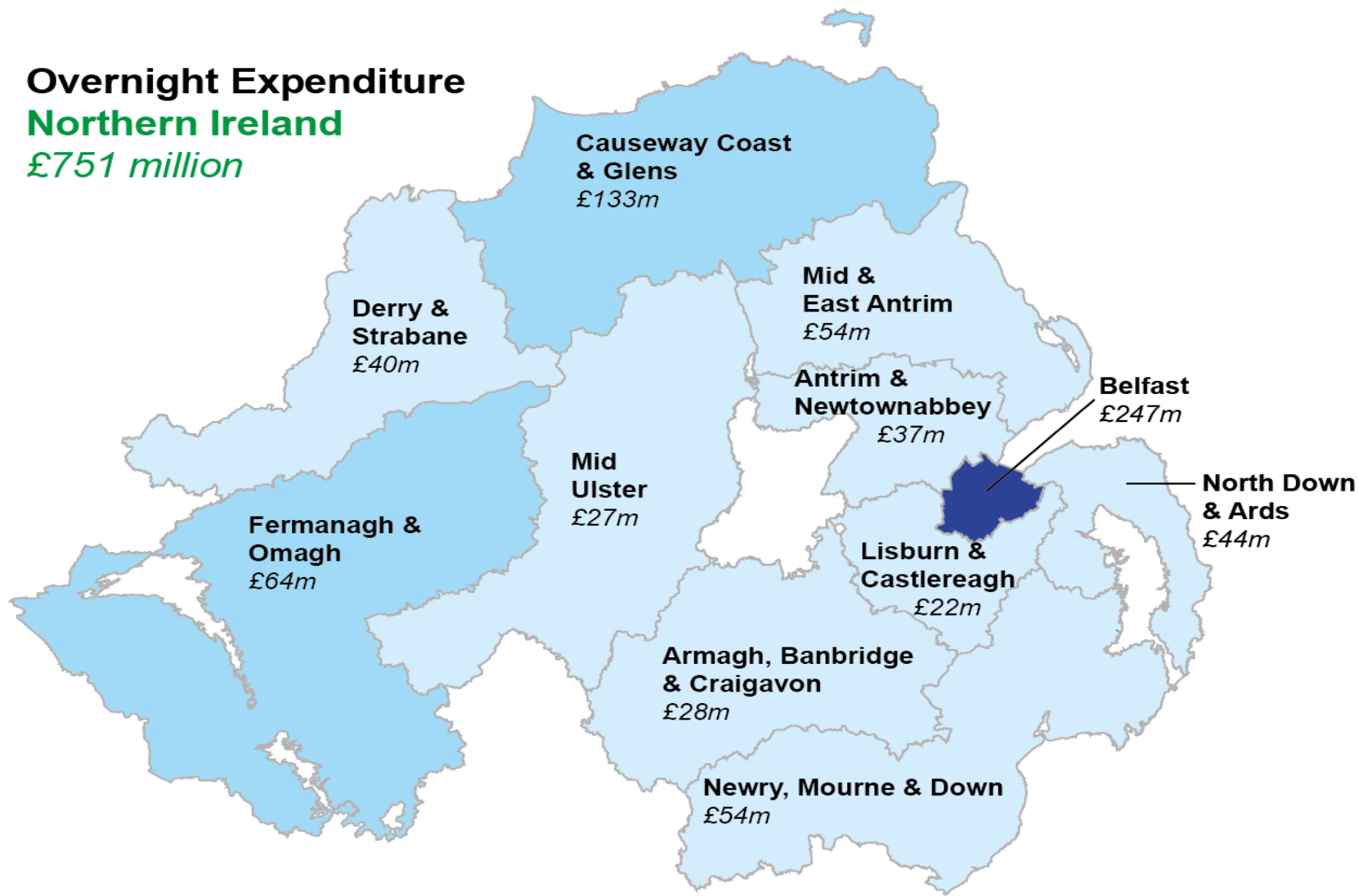
- Figure 3a shows the expenditure associated with overnight trips taken in each Local Government District (2014). This data is also shown in map form in Figure 3b.
- As would be expected, this picture broadly follows the number of overnight trips. In total £751 million was spent on overnight trips across Northern Ireland, with £247 million or 33% spent in Belfast LGD. A further £133 million (18%) was spent in Causeway Coast & Glens Coast & Glens.

**Figure 3a: Expenditure (£) on Overnight Trips by Local Government District, 2014**



See [link](#) for data

Figure 3b: Map of Expenditure on Overnight Trips by Local Government District, 2014



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See [link](#) for data



#### **Reason for Overnight Trip**

- Survey respondents are also asked the reason they stayed overnight in Northern Ireland. The results for all overnight trips regardless of place of origin<sup>1</sup> are shown in Figures 4a-c.
- In overall terms the three graphs show the relative importance of each sector. Overnight trips for holiday purposes makes up 43% of the Northern Ireland market, visiting friends and relatives 42% and business trips 9%. However, this masks significant local variation.
- Figure 4a shows the proportion of overnight trips in each local area that were taken for holiday/pleasure/leisure reasons. The relative importance of holiday tourism is noted in the Causeway Coast & Glens and Newry, Mourne and Down. Over the period 2012-2014, three out of five overnight trips taken in Causeway Coast & Glens (60%) were for holiday purposes. Over half of overnight trips in Newry, Mourne & Down were for holiday-purposes (51%). A significant element of this relates to Northern Ireland residents taking holidays in typical holiday towns/areas such as Portrush, Portstewart, Newcastle, Fermanagh Lakelands.
- In contrast, Figure 4c shows that the two main cities, Belfast and Londonderry, have a significant pull for business trips. In Belfast 16% overnight trips are for business reasons, while it is 15% in Derry & Strabane. Indeed, of all those people taking an overnight business trip in Northern Ireland, around half (49%) stay in Belfast LGD.

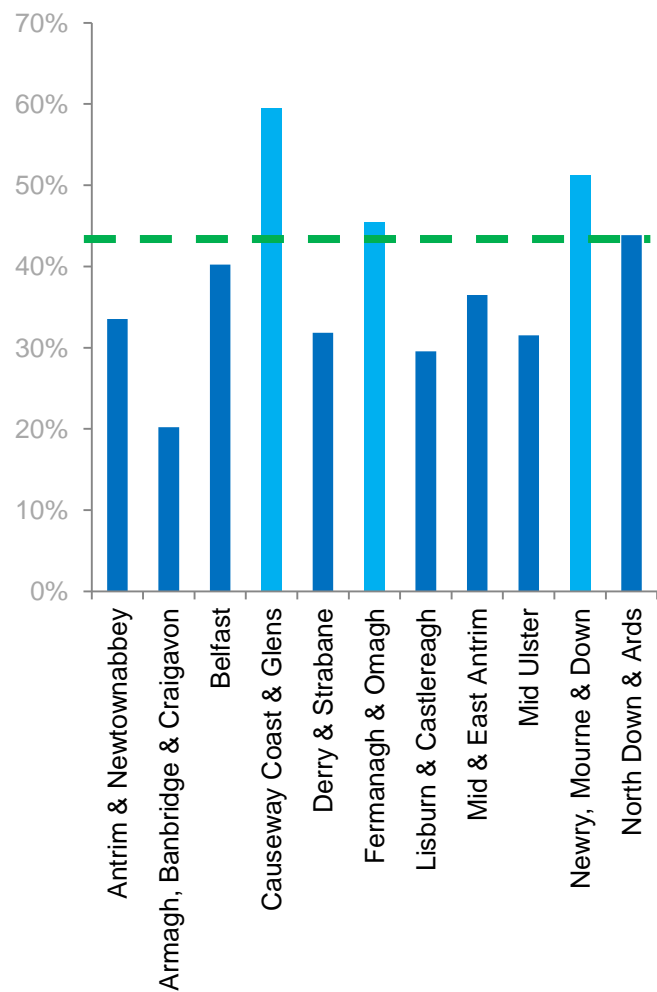
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<sup>1</sup> It is important to remember that this includes overnight trips of local residents within Northern Ireland.

Figures 4a-c: Reason for Overnight Trip in Northern Ireland within Local Government District (3 year rolling average)

4a. Holiday/Pleasure/Leisure

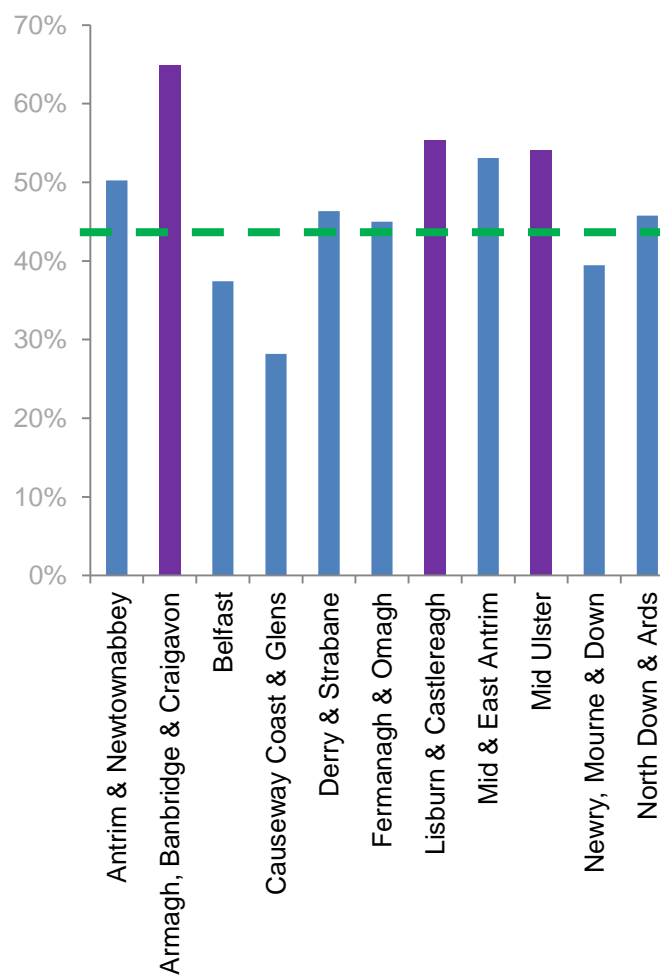
NI 43%



Causeway Coast & Glens,  
Newry, Mourne & Down,  
Fermanagh & Omagh

4b. Visiting Friends/Relatives

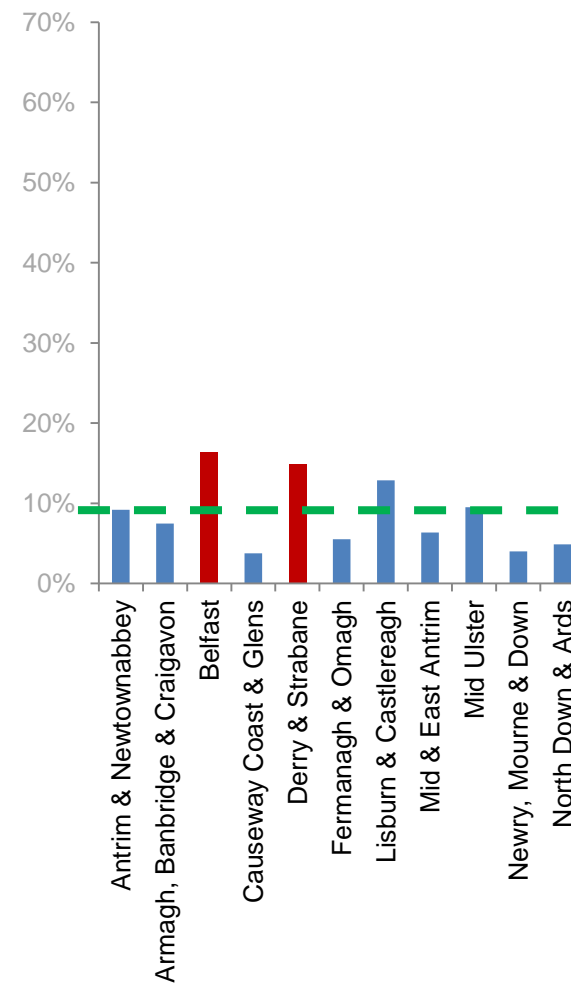
NI 42%



Armagh, Banbridge & Craigavon,  
Lisburn & Castlereagh,  
Mid Ulster

4c. Business

NI 9%

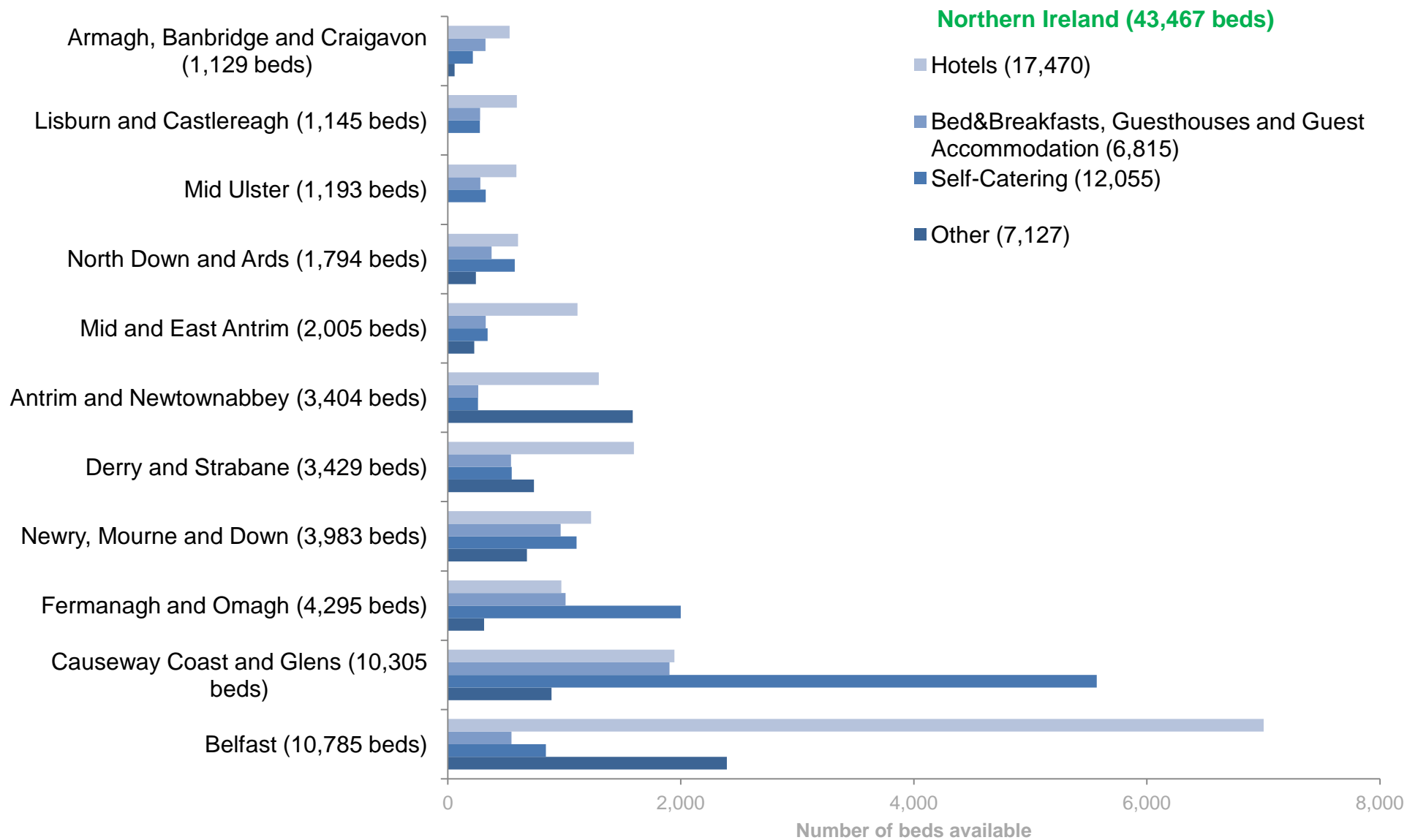


Belfast,  
Derry & Strabane

See [link](#) for data

- The availability of commercial accommodation is an indicator of the supply side of tourism. Figure 5a (overleaf) shows the volume of beds in commercial accommodation by Local Government District in 2014.
- Around half of all beds in licensed accommodation in Northern Ireland are in two LGDs - Belfast (25%) and Causeway Coast and Glens (24%). However, the makeup of the establishments within these areas differ, with Belfast having the largest number of hotel beds (7,002 beds or 40% of the Northern Ireland picture).
- In contrast, the importance of self-catering accommodation in Causeway Coast & Glens and Fermanagh & Omagh LGDs is also clear. There are 7,569 self-catering beds in these two areas out of 12,055 self-catering beds in NI.

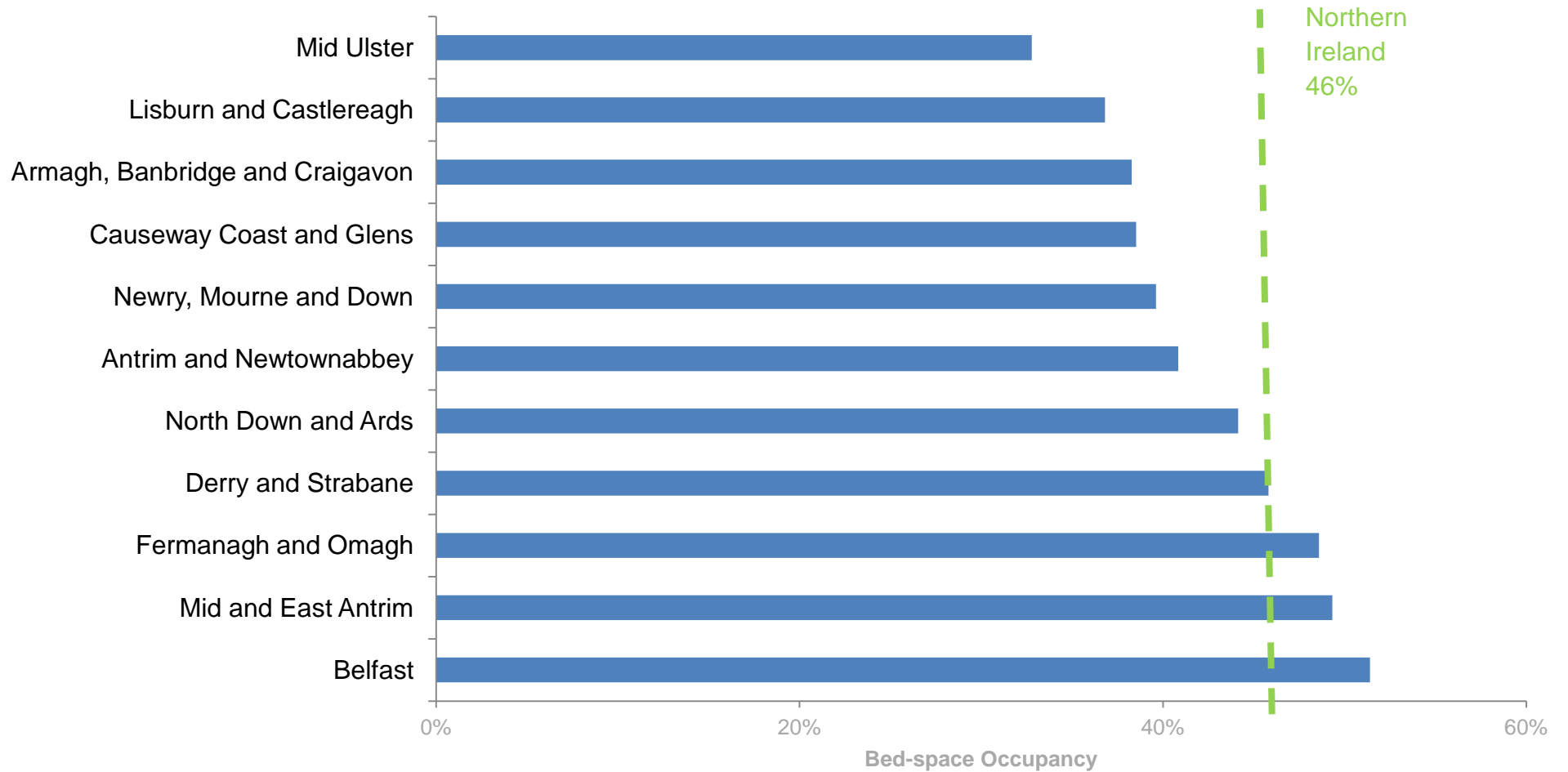
**Figure 5a: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2014**



See [link](#) for data

- NISRA run occupancy surveys of local commercial accommodation. Figure 5b shows bed-space occupancy by LGD in 2014; the Figure points to Belfast having higher hotel bed-space occupancy levels than other areas.

**Figure 5b Bed-space occupancy of Hotels by Local Government District, 2014**

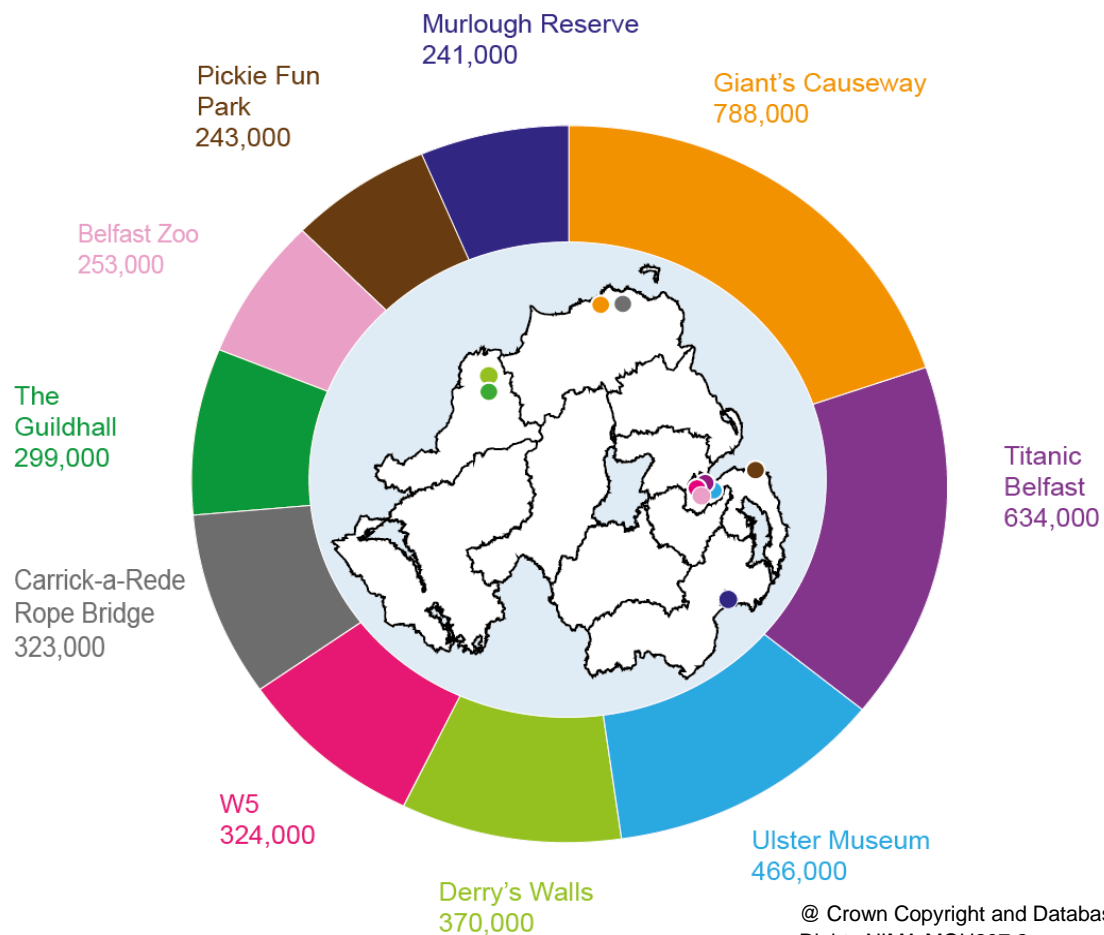


See [link](#) for data

Visitor Attractions

- 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.
- Last year, the top visitor attractions were the **Giant's Causeway** (0.79 million visits), **Titanic Belfast** (0.63 million), the **Ulster Museum Belfast** (0.47 million) and **Derry's Walls** (0.37 million). This is shown in graphical form in Figure 6.

Figure 6: Top 10 Visitor Attractions\*, 2014



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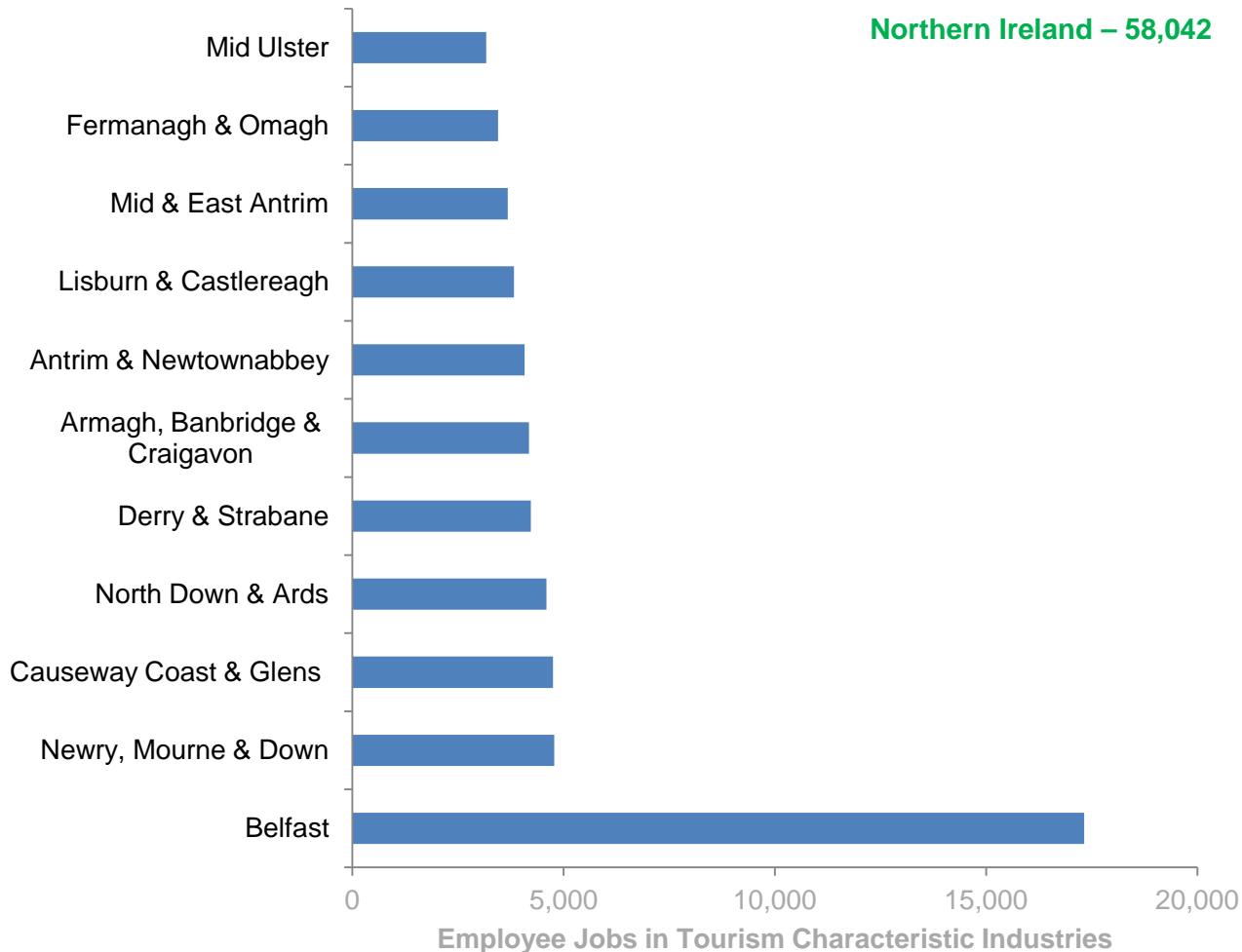
\*excludes country parks/parks/forests/gardens

See [link](#) for data

**Employee Jobs in Tourism Characteristic Industries**

- Employee Jobs in tourism characteristic industries relates to a number of different business areas, most notably hotels and restaurants.
- Figure 7a gives an indication on the number of employee jobs in tourism characteristic industries in each local area. In total, in 2013 there were just under 700,000 employee jobs in Northern Ireland, of which 58,000 or 8% are in tourism characteristic industries. Within Northern Ireland, Belfast LGD accounts for 30% of the total. When looking at the relative importance of the tourism industry within local areas, North Down & Ards and Causeway Coast & Glens LGDs both have over 12% of local employment in this industry.

**Figure 7: Employee Jobs in Tourism Characteristic Industries in Local Government Districts 2013**

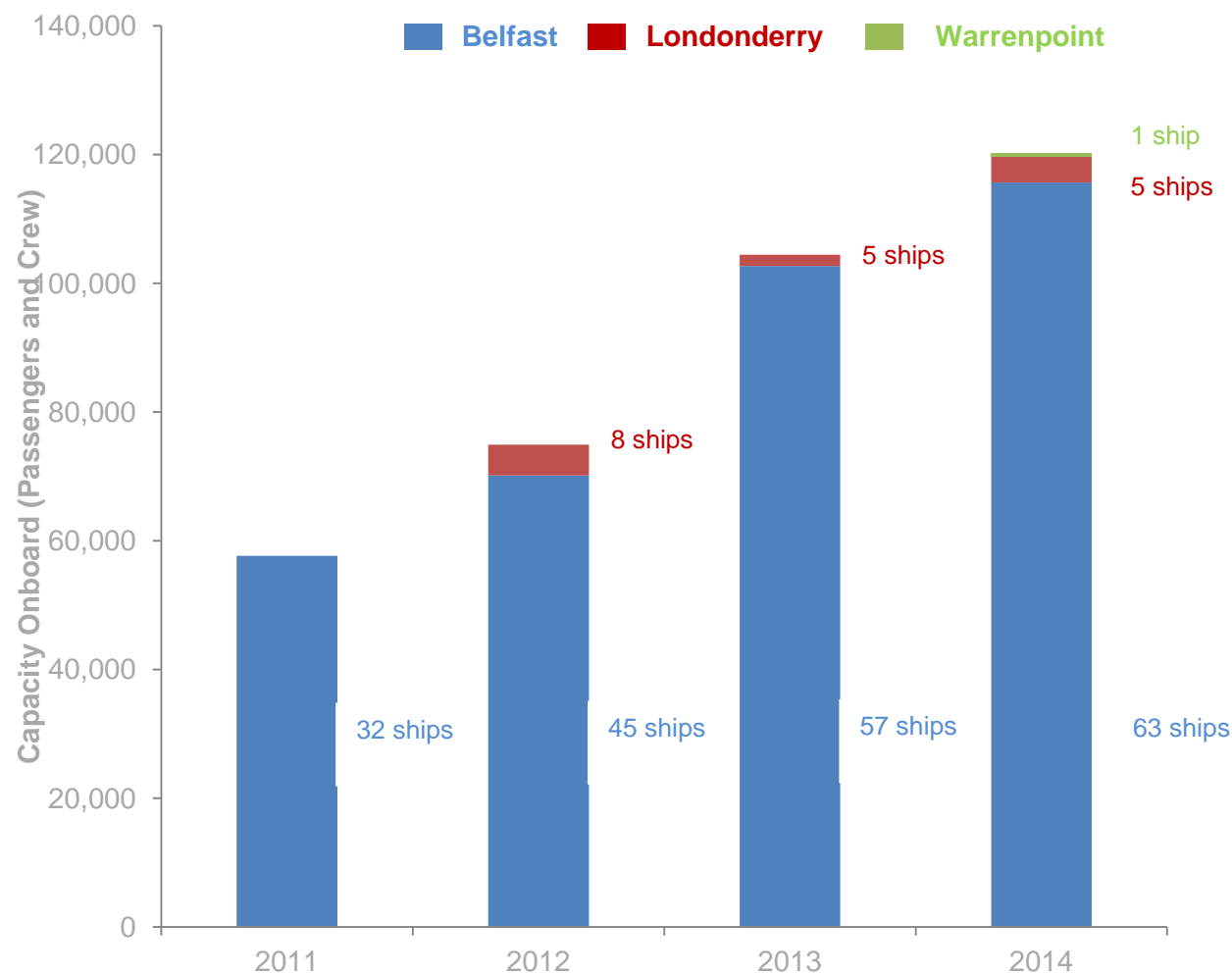


See [link](#) for data

## Cruise Ships

- Cruise ships are one part of the day trip market for which there are reliable local figures. Figure 8a shows the trend in the number of cruise ships docking at local ports – see background note 12.
- In 2014, 63 cruise ships docked in Belfast port, 5 in Londonderry port and 1 in Warrenpoint port. The figures point to a significant increase in numbers of people visiting Northern Ireland from cruise ships, up from 58,000 in 2011 to 121,000 in 2014. Research shows that a significant number of cruise ship passengers will go on trips to other areas (for example from Belfast to the Giants Causeway).
- Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (e.g. Bangor & Portrush) – statistics from these visits are not included in this report due to data availability issues.

**Figure 8: Total cruise ship numbers and passengers onboard docking at NI ports (2011-2014)**



See [link](#) for data



## Background Notes

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1. This report presents a summary of 2014 tourism statistics by Local Government Districts (LGD). Tourism data is derived from a variety of sources, more information on these sources can also be found at this [link](#). Information on the data quality, revisions can be accessed at this [link](#)
2. 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
3. The measures reported in this report are the primary means of monitoring progress towards Programme for Government (PfG) targets related to tourism. These aimed to increase visitor numbers to 4.2 million and tourist revenue to £676 million by December 2014. PfG targets relate to all overnight trips in Northern Ireland including people from (i) Great Britain (ii) the Republic of Ireland (iii) outside the UK and Republic of Ireland and (iv) Northern Ireland taking overnight trips within NI. The published tourism estimates indicate that both sets of targets for 2014 have been met.
4. NISRA uses the Survey of Overseas Travellers run by Fáilte Ireland to gain information on the overnight trips to Northern Ireland who exit through Republic of Ireland ports. Limited information on Northern Ireland overnight trips is also now collected through a separate survey carried out by Central Statistics Office Ireland. NISRA is undertaking research to assess how the two sources could be used together in the future. NISRA aims to publish the results of this research in summer 2015.
5. The 2014 Northern Ireland tourism statistics showed there were 4.5 million overnight trips, this figure is lower than the 'all LGD' total (4.6 million). The LGD figure is higher as someone may spend time 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 (background note 4) 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.
8. 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. An overview and explanation of any resultant breaks and the implications can be found at this [link](#).
9. While the statistics are produced in as timely a way as possible, it is realised that early indicators would be useful. Early tourism indicators are published at this [link](#) and are updated monthly.
10. The estimates 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 2014 stands at +/- 7% for the year (associated expenditure at +/- 11%). Note: based on the survey design confidence intervals for domestic tourism trips stands at +/-10% and external trips at +/-5%. Information on confidence intervals in Northern Ireland tourism statistics can be accessed at this [link](#).

11. This report includes estimates from Census of Employment on the number of jobs in ‘tourism characteristic industries’. The latest tourism characteristic industries breakdown available is for 2013 as the Census of Employment is carried out every two years. More information on the Census of Employment and the associated methodology can be accessed at this [link](#) .
12. 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) – statistics from these visits are not included in this report due to data availability issues.
13. Follow NISRA on [Twitter](#) and [Facebook](#).

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