

Northern Ireland Tourism Satellite Account

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Key Results

The Northern Ireland Statistics and Research Agency (NISRA) has published a Tourism Satellite Account (TSA) for Northern Ireland (NI) for the 2019 reference year. This has been produced in line with internationally recognised guidance by the UN Tourism.

Key results from the TSA are highlighted below.

- The total value of NI Gross Value Added (GVA) for NI for 2019 equated to £43.7 bn. Tourism direct gross value added (TDGVA) was £920 million in 2019, equating to 2.1% the GVA for the total NI economy.
- The number of full-time equivalent employees working in tourism industries was around 75,000. There were 27,000 tourism direct employees which equated to 22,000 tourism direct full-time equivalent jobs.
- Expenditure by inbound visitors to NI was £804 million in 2019 in current prices, with overnight visitors accounting for 91% of this total.
- Domestic tourism expenditure by NI residents was £1.8 billion, with overnight visitors contributing 53%.
- Outbound tourism expenditure by NI residents was £1.9 billion, with overnight trips accounting for 96%.

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1 Introduction

The Department for the Economy (DFE) NI commissioned Northern Ireland Statistics and Research Agency (NISRA) to produce a Tourism Satellite Account for Northern Ireland (NI) to inform the measurement of the Tourism industry in NI and support tourism related policy development going forward. The TSA has been developed to provide policy makers and key stakeholders in Northern Ireland with credible statistics relating to the NI Tourism industry in order to support policy development and decision making in this sphere going forward.

This bulletin presents the findings for the 2019 NI TSA. All findings are in current prices – also known as nominal, cash or value series – which means they are not adjusted for inflation.

A spreadsheet with the accompanying TSA tables discussed in this bulletin has been published alongside this document on the NISRA website.

Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence, pleasure being the usual motivation.

Tourism has an impact on the economy, the natural and built environment, the local population at the places visited and the visitors themselves.

Owing to this range of impacts and the wide spectrum of stakeholders involved, there is a need for a holistic approach to tourism development, management and monitoring. This approach is supported by the UN Tourism in order to formulate and implement national and local tourism policies.

Having more and reliable statistics is essential for policymakers to make effective decisions. Only with sufficient and adequate data that generate credible statistics is it possible to undertake different types of analysis of tourism. This is essential in order to evaluate the different aspects of tourism and to support and improve policy and decision-making.

International Recommendations for Tourism Statistics 2008 (IRTS 2008) published by the UN Tourism

2 TSA Background

The TSA has been developed for the 2019 reference year as this is the latest year that all required data sources are available.

Developing a TSA requires a large amount of data sources and an integral part of the TSA relies on data from Supply-Use Tables (SUTs). The SUTs provide a picture of the flows of products and services in the economy for a single year and are used to set the level of annual current price Gross Domestic Product (GDP). They show the composition of uses and resources across institutional sectors and the inter-dependence of industries in order to reconcile the production, income and expenditure approaches to the measurement of GDP.

The SUTs cover the whole of the NI economy and as such require analysis of a vast range of data sources, including data from the UK SUTs provided to NISRA by the Office for National Statistics (ONS). As such, the NI SUTs have a lag of around 3-4 years for the most recent reference period. The most up to date SUTs for NI relate to the 2019 reference year and were published in August 2023.

As a result, the TSA has been produced for the 2019 reference year. In addition, due to COVID-19, tourism surveys were unable to be carried out. During the period of time they were paused, Central Statistics Office (CSO) also changed methodology on how they collect key tourism indicators. Due to the break in series, the first set of tourism results following 2019 will be for 2023.

The NI TSA has been developed in line with the Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008) published by the UN Tourism, Organisation for Economic Co-operation and Development (OECD), and Eurostat. This provides a comprehensive methodological framework for collection and compilation of tourism statistics in all countries irrespective of the level of development of their statistical systems.

The TSA compiles information on both the supply side and the demand side of tourism. This means that it highlights economic activity in tourism-related industries and portrays tourism in the context of the overall economy and alongside other sectors. Putting tourism in an economic context is a key reason for compiling the TSA.

3 The demand side: How much do visitors spend? (Tables 1-4)

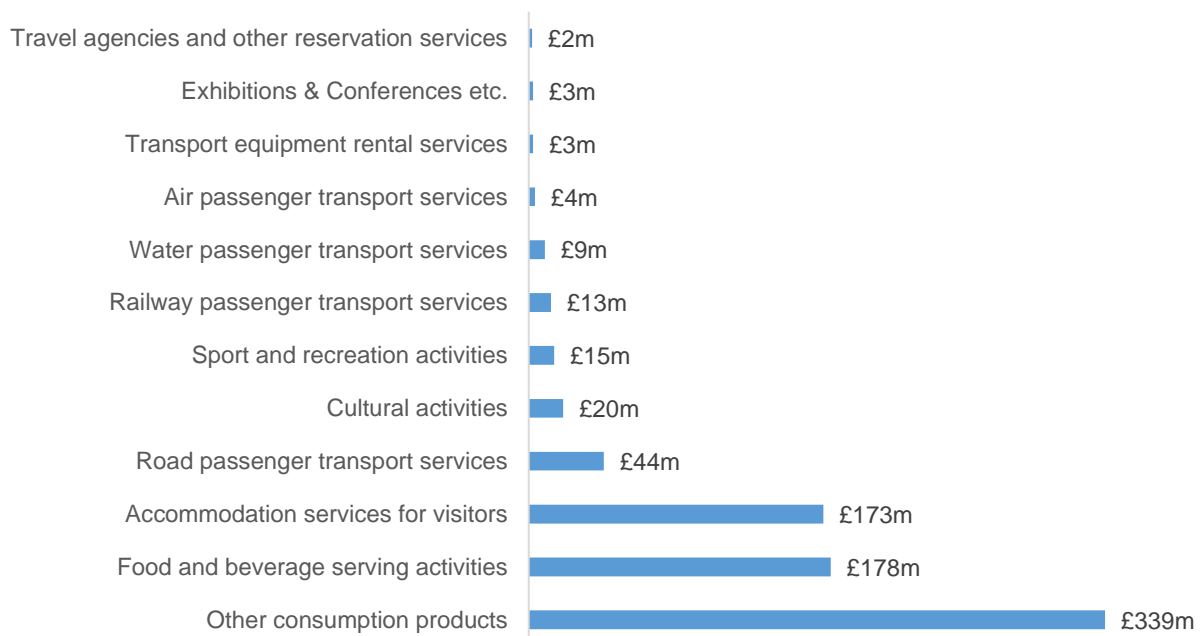
Tourism demand consists of inbound tourism (visitors to NI – including GB, Ireland and other overseas) and domestic tourism (NI residents spend on NI products both on tourism trips in NI and services made for a trip outside of NI).

Inbound tourism (TSA Table 1)

Expenditure by inbound tourism to Northern Ireland was valued at **£804 million** in 2019. Overnight visitors (tourists) account for 91% of the inbound tourism.

The largest contribution to inbound tourism in 2019 came from ‘Other consumption products’ (£339 million or 42%) – this includes special shopping, personal transport costs and expenditure on services such as education. This was followed by ‘Food and beverage serving activities’ (£178 million or 22%) and ‘Accommodation services for visitors’ (£173 million or 22%).

Chart 1: Inbound Tourism Expenditure by Product (£804 million)



The CSO TSA 2019 reported that expenditure by inbound tourism to Ireland was €7.3 billion in 2019, with overnight visitors accounting for 96% of this total.

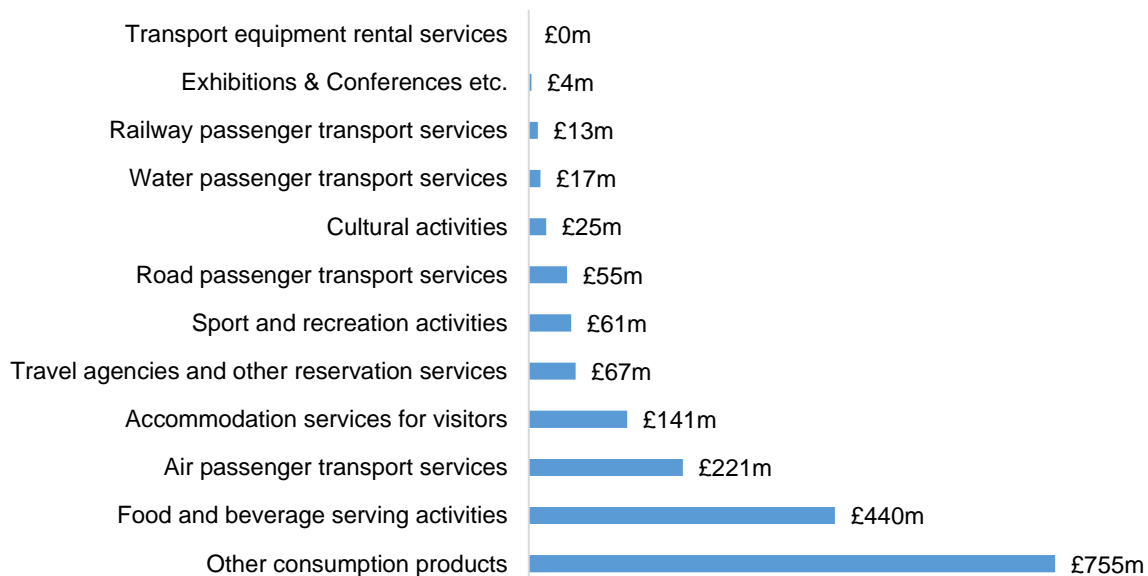
According to the ONS TSA 2019, expenditure by inbound tourism to the UK was £28.2 billion in 2019, with overnight visitors accounting for 98% of this total. The largest contribution to inbound tourism in 2019 came from ‘Other consumption products’ which includes “special shopping, personal transport costs and expenditure on services such as education”.

Domestic Tourism (TSA Table 2)

Expenditure by domestic tourism (NI residents spend on tourism on NI products both on tourism trips in NI and services made for a trip outside of NI) in NI was valued at **£1.8 billion** in 2019. 61% of this were on domestic trips within NI, the other 39% on NI services for a tourism trip outside of NI, that is expenditure on tourism in NI for a trip elsewhere. 53% of NI domestic tourism expenditure was on overnight tourism.

Over two fifths (42% or £755 million) of domestic tourism expenditure were attributed to ‘Other consumption products’ (this includes personal transport costs, special shopping, clothes, car parking, amongst other costs). 24% (£440 million) of domestic tourism expenditure was on ‘Food and beverage serving activities’.

Chart 2: Domestic Tourism Expenditure by Product (£1.8 billion)



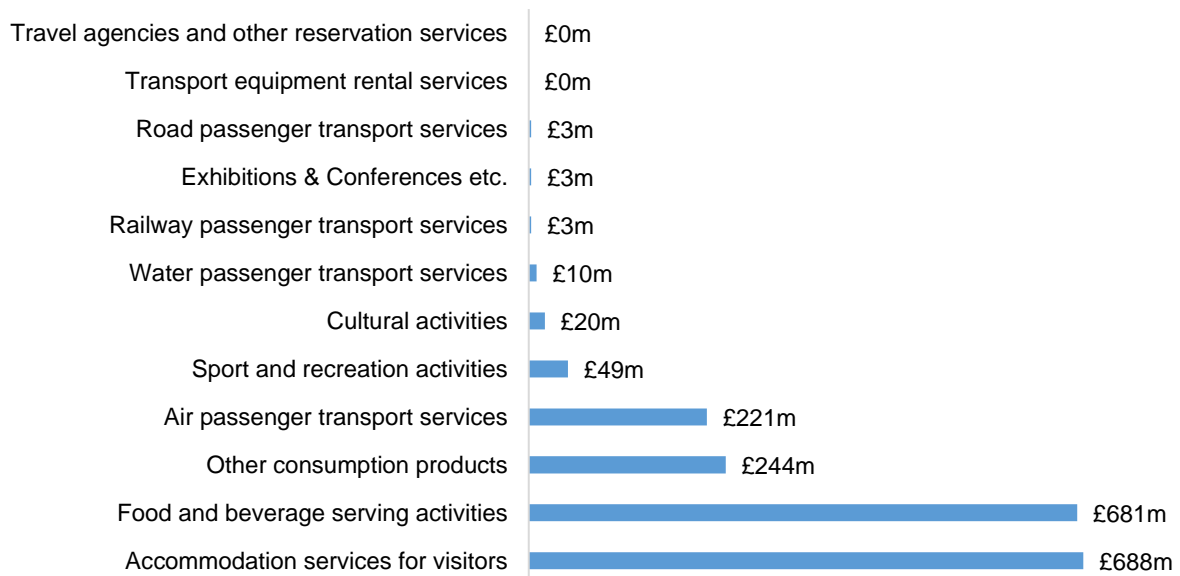
The 2019 ONS TSA showed that expenditure by domestic tourists in the UK in 2019 was £144 billion, 42% of which was on overnight trips. Three quarters of expenditure by UK domestic tourism was on domestic trips within the UK, the remaining 25% on services or products for outbound trips by UK residents.

Outbound tourism (TSA Table 3)

Expenditure by NI residents on tourism outside of NI was valued at **£1.9 billion** in 2019. The majority of this was on overnight trips (96%).

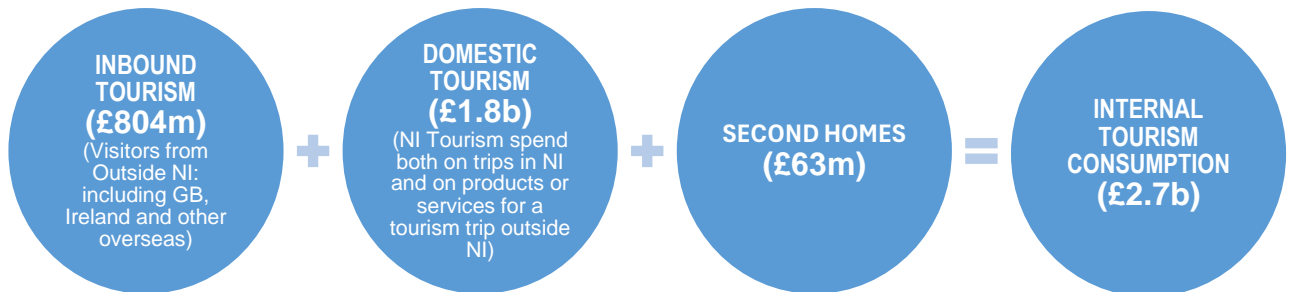
Over a third was attributed to both ‘Accommodation services for visitors’ (36% or £688 million) and ‘Food and beverage serving activities’ (35% or £681 million).

Chart 3: Outbound Tourism Expenditure by Product (£1.9 billion)



The ONS TSA showed the outbound tourism by UK residents in 2019 was valued at £75.7 billion, 91% of this was on overnight trips. Almost two fifths (38%) were attributed to ‘Other consumption products’ with a further 19% on ‘Air passenger transport’. The third largest product in outbound tourism was ‘Accommodation services for visitors’ (16%).

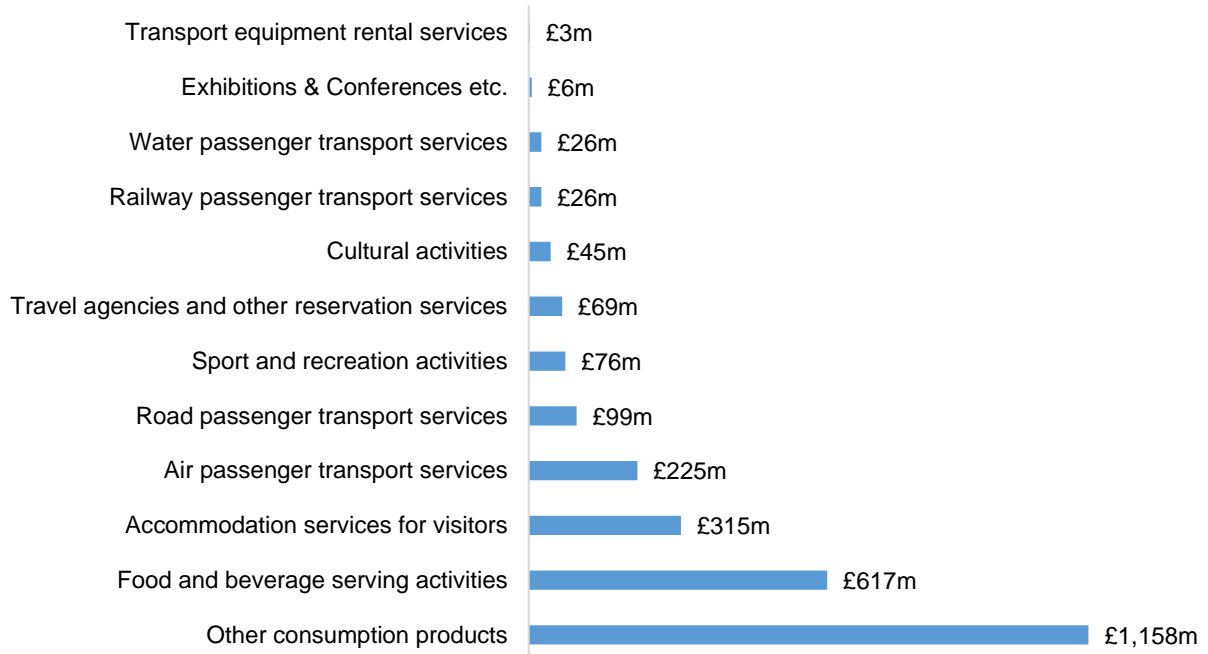
Figure 1: Internal tourism consumption (TSA Table 4)



Total internal tourism consumption in NI in 2019 was estimated at **£2.7 billion** – this combines inbound and domestic tourism with other components of tourism consumption (second homes).

The largest product for total tourism consumption in NI in 2019 was on ‘Other consumption products’ (43% or £1.16 billion) which includes special shopping, second homes, personal transport amongst others. This category was followed by ‘Food and beverage serving activities’ (23% or £617 million) and ‘Accommodation services for visitors’ (12% - £315 million).

**Chart 4: Internal Tourism Consumption by Product
(£2.7 billion)**



According to the ONS TSA 2019, internal tourism consumption in the UK in 2019 was estimated at £179 billion – 38% of this was on “Other consumption products” and 22% on “Food and beverage serving activities”.

5 Tourism Employment (Table 7)

Employment is a key variable in the economic analysis of productive activities. 'Employment in tourism' measures the number of jobs in tourism and non-tourism industries (but directly connected to tourism) held by self-employed, employees and family workers.

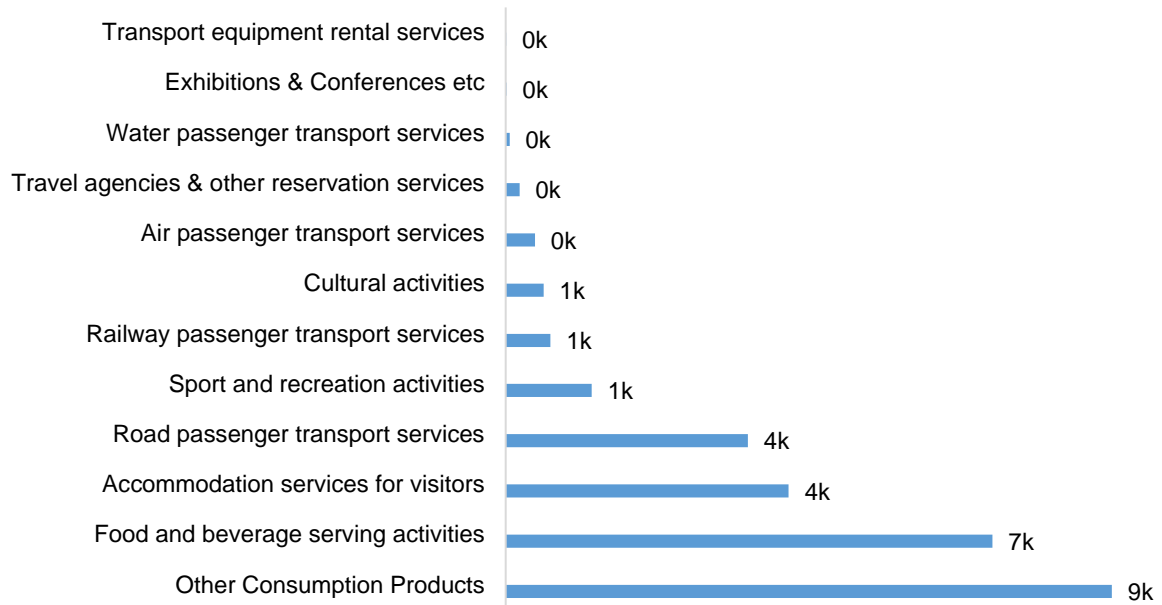
As part of the TSA methodology certain specified industries are considered to be involved in tourism characteristic activities (for example accommodation services and passenger transport). Employment in these sectors can then be defined as tourism characteristic industry employment (a full list of these are available in the supporting methodology paper). But within these sectors not all employment may be directly connected to tourism (e.g. food and beverage sector serving local customers at a restaurant). Therefore, the TSA records both tourist industry employment and the more specific concept of tourism specific employment.

In terms of tourism businesses an estimated 5,549 enterprises were involved in providing goods and services directly to tourism in 2019. In NI, there were an estimated 75,000 full time equivalent jobs involved in tourism (this represented 9.7% of all FTEs in NI). There were 27,000 employed in tourism direct jobs with 22,000 (2.8% of all FTEs) full time equivalent jobs (FTE).

In 2019, the CSO TSA estimated that there were 284,800 full-time equivalent jobs directly involved in tourism in Ireland, which represents a tourism share of more than 13% of total full-time equivalent jobs in the overall Irish economy. When all full-time equivalent jobs in the tourism characteristic industries are included (adding those not directly involved in tourism), the employment figure rose to 351,700.

In the same period, ONS TSA estimated that there were 3.2 million full time equivalent jobs in tourism industries in the UK (10.6% of all FTEs in the UK). Of these, 1.4 million (4.6% of all FTEs in the UK in 2019) were tourism direct full time equivalent jobs.

Chart 5: Tourism Direct Employment (27,000)



6 Tourism Direct Gross Value Added (TDGVA) (Table TDGVA)

The diagram below helps to explain how Gross Value Added is calculated.

Figure 2: Gross Value Added equation

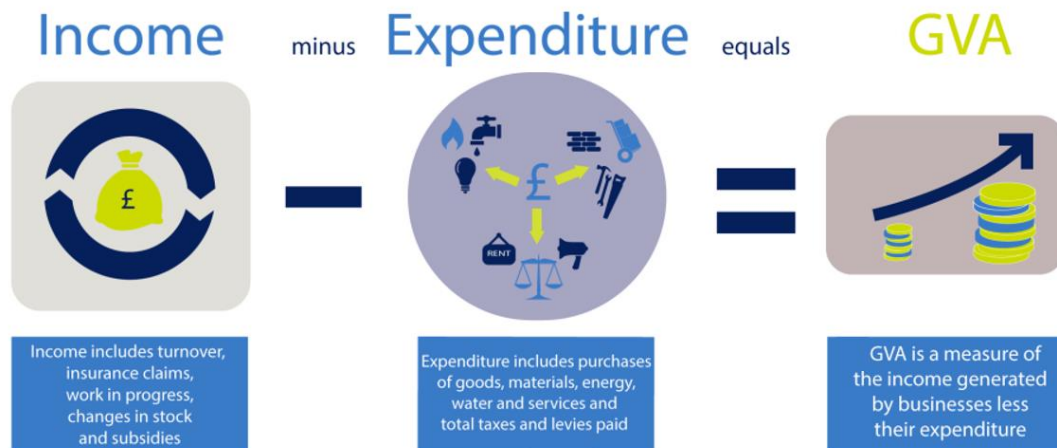
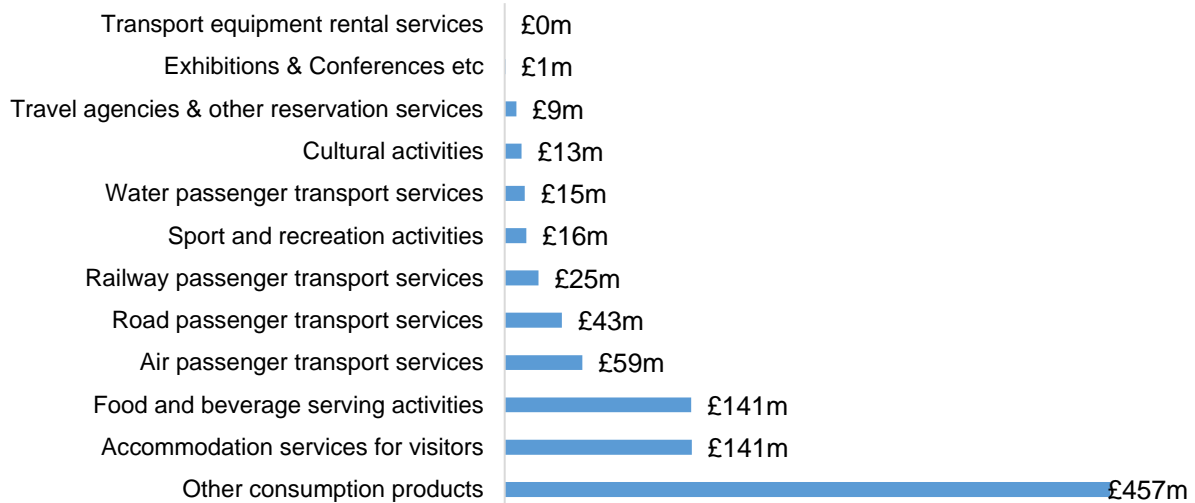


Table 5 of the NISRA Tourism Satellite Account shows that all industries related to tourism have a GVA of £2.3 billion. However, it is recognised that not all the products and services within these industries is tourism direct (i.e. not all retail and hospitality can be servicing tourists). Therefore, it is necessary to calculate the Tourism Direct Gross Value Added (TDGVA) which shows the amount of GVA that is related to tourism activity within the wider range of tourism related industries.

Tourism direct gross value added (TDGVA) indicates the component of output from the NI tourism industries that is driven directly by tourism spend. TDGVA is calculated by reconciling the supply (the output of tourism industries) with the demand (tourist expenditure) side of tourism, so that the proportion of the output of the tourism industries that is accounted for by tourism expenditure can be estimated.

TDGVA contributed £920 million to the NI economy in 2019. The main contributor to TDGVA over the year was 'Other consumption products' (50% or £457 million), which refers to the proportion of output for non-tourism industries that is accounted for by tourism spend. This includes activities such as non-food shopping or expenditure on personal transport and other activities not included within the tourism industries. The other main tourism contributors to TDGVA were accommodation services for visitors (16%) and food and beverage serving activities (15%).

Chart 6: Tourism Direct Gross Value Added by Product (£920 million)



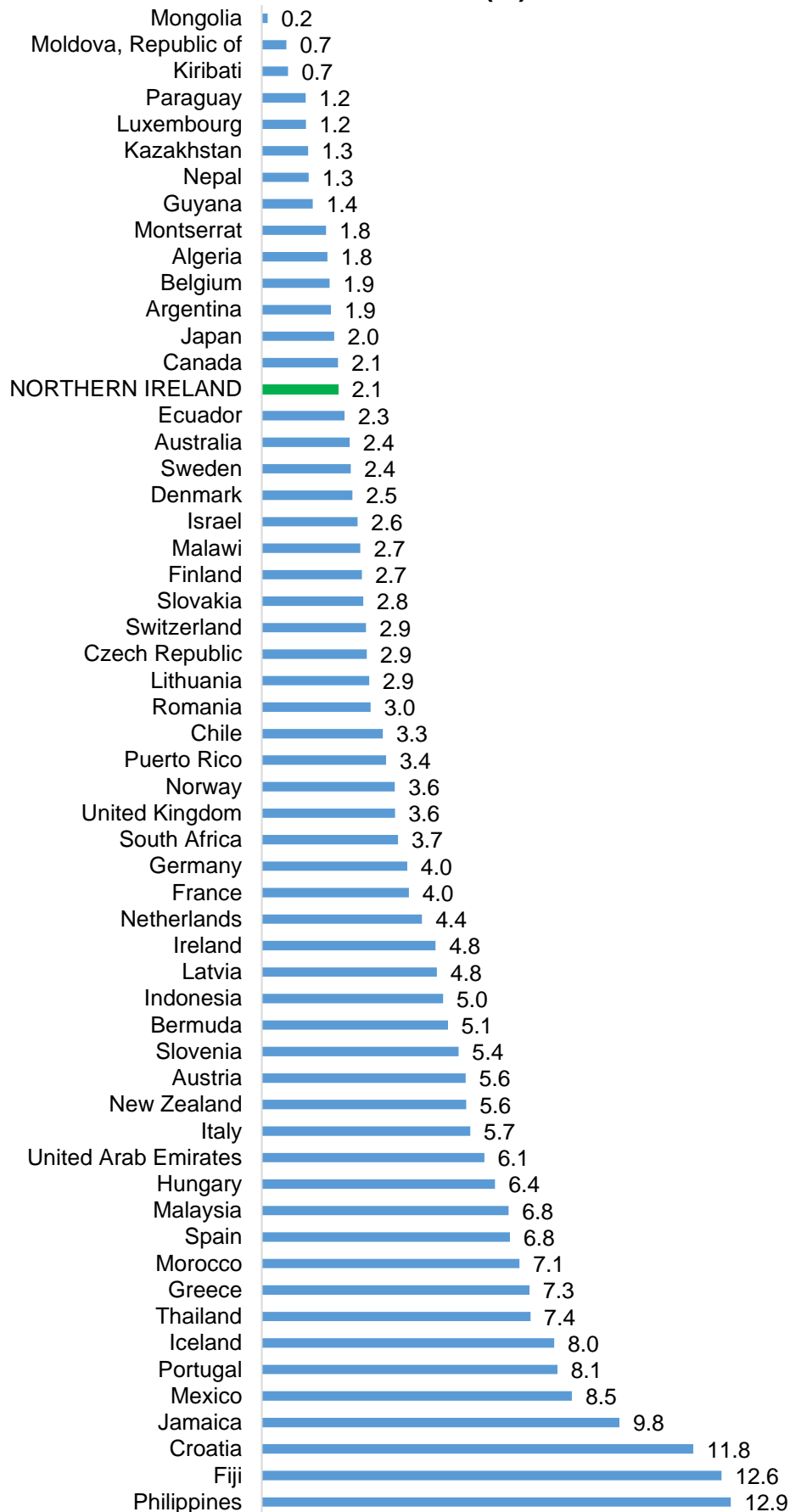
NISRA estimates that tourism contributed £920 million to the NI economy in 2019, and this gives a ratio of TDGVA to total Gross Value Added (GVA) in the economy of 2.1%.

ONS calculated that tourism contributed £74 billion directly to the UK economy in 2019, this gives a ratio of TDGVA to total Gross Value Added (GVA) in the economy at 3.6%. CSO estimated €13.5 billion total TDGVA for Ireland giving a ratio of 4.4% to GVA in the economy.

According to the UN Tourism (<https://www.unwto.org/tourism-statistics/economic-contribution-SDG>) ; across the EU the average ratio was estimated at 4.5% in the same year (Chart 7). Croatia (11.8%) recorded the largest TDGVA ratio in 2019, followed by Portugal (8.1%) and Spain (6.9%). The lowest TDGVA ratio was found in Luxembourg (1.2%) and Belgium (1.8%).

Globally, Canada TDGVA as a proportion of the GVA was 2.1% in 2019, Australia was 2.4%, Jamaica ratio was 9.8% and Mexico 8.5%.

Chart 7: Tourism Direct GVA as a proportion of all GVA (%)

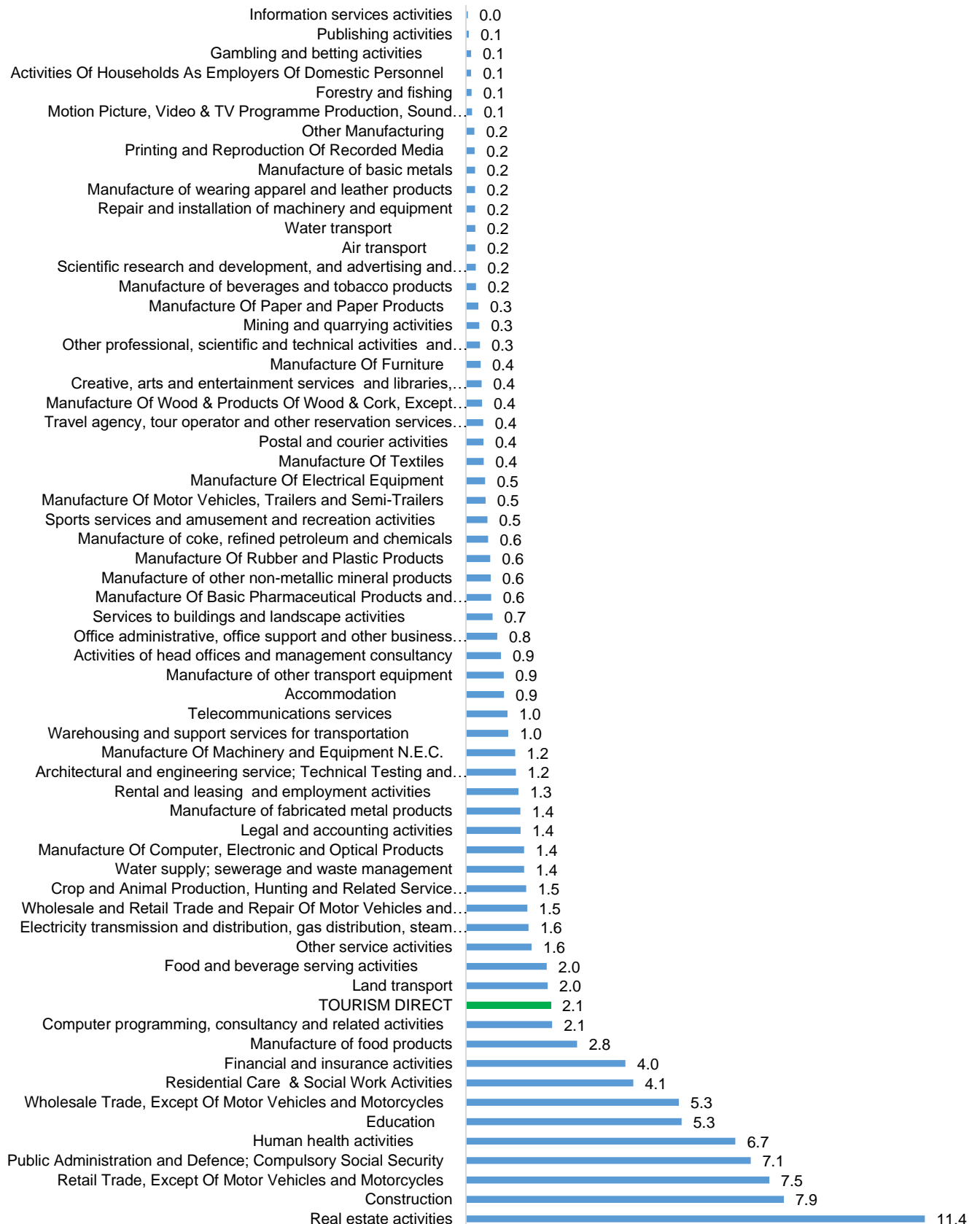


When comparing the NISRA NI Tourism Satellite Account to other countries, it is important to bear in mind that NI is a subnational component of the UK. As such, trips from GB into NI are considered an NI import; whereas at the UK level these movements are considered internal domestic trips. In addition, the proximity and ease of access to Ireland further increases the NI imports of travel services and so can impact the results in a way that larger national TSAs such as those for the UK may not feel to the same extent.

To put the tourism direct GVA into context, the Economic Accounts NISRA publication on Supply-Use tables (<https://www.nisra.gov.uk/publications/ni-economic-accounts-project-2018-and-2019-experimental-results>) can be used to look at other industries' GVA as a proportion of NI GVA (Chart 8).

The whole telecommunications sector (£450 million GVA) in NI in 2019 was worth 1% of NI GVA. The whole food and beverage serving activities sector was worth 2% (£876 million GVA) and Construction was worth 7.9% (£3.5 billion). Computer programming, consultancy and related activities in NI was also worth 2.1% of total GVA in 2019. It is important to note as evident in the Tourism Satellite Account, that the tourism industry as defined by UN Tourism spans across a range of industries, so comparisons should be made with caution of overlap.

Chart 8: 2019 Industry GVA as proportion of all NI GVA (%)



7 Non-monetary data (Tables 10a-10h)

The TSA also provides the link between economic data and non-monetary information on tourism, such as number of trips (or visits), duration of stay, purpose of trip, etc. These non-monetary indicators facilitate a better understanding of the tourism economic variables by taking into account the flows of visitors and other descriptive characteristics of tourism supply and demand.

As such, Table 10 presents a number of non-monetary indicators to support the interpretation of the information presented in tables 1 to 7.

Table 10a: Estimated number of overnight trips (thousands) in NI by reason for trip, 2019

Holiday	2,679
Visiting Friends/relatives	1,923
Business	450
Other	211
Total	5,263

Table 10b: Estimated number of overnight trips (thousands) to NI by visitors outside NI, by reason for trip, 2019

Holiday	1,175
Visiting Friends/relatives	1,293
Business	395
Other	138
Total	3,001

Table 10c: Estimated number of overnight nights (thousands) spent in NI by reason for trip, 2019

Holiday	6,600
Visiting Friends/relatives	7,598
Business	1,299
Other	830
Total	16,327

Table 10d: Estimated number of overnight nights (thousands) spent in NI by visitors outside NI, by reason for trip, 2019

Holiday	3,459
Visiting Friends/relatives	6,488
Business	1,201
Other	665
Total	11,814

Table 10e: Estimated Trips and Nights (thousands) in NI by Country of Residence, 2019

Country of Residence	Trips	Nights
GB	1,461	5,710
Outside GB and NI	783	4,246
Rol	756	1,859
NI	2,263	4,512
Total	5,263	16,327

Table 10f: Accommodation Stock, December 2019

	Number	Rooms	Beds
All	4,713	30,703	62,087
Hotels	145	9,596	21,506
Guesthouses	78	698	1,651
Bed+Breakfasts	653	2,078	4,665
Guest Accommodation	231	1,223	2,802
Self-catering	3,538	12,212	24,191
Hostel, Bunkhouse and Campus	68	4,896	7,272

Table 10g: Northern Ireland Occupancy Rates, 2019

Hotel Occupancy		Bed+Breakfast, Guesthouses and Guest Accommodation Occupancy		Self Catering Occupancy	
Room Occupancy	Bed-Space Occupancy	Room Occupancy	Bed-Space Occupancy	Annual	Peak
67%	54%	33%	26%	31%	42%

Table 10h: Cruise Ships docking in NI and capacity of ship, 2019

Ships	Capacity of Ship (Passengers and Crew)
167	290,198

6 Quality and Methodology

The TSA has been developed to provide policy makers and key stakeholders in Northern Ireland with credible statistics relating to the NI Tourism industry to support policy development and decision making in this sphere going forward.

The TSA is an extension, or satellite, of the System of National Accounts 2008 (SNA 2008)¹ which sets out an internationally agreed standard set of recommendations on how to compile measures of economic activity.

Specifically the TSA has been developed in line with the Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008) published by the UN Tourism, Organisation for Economic Co-operation and Development (OECD), and Eurostat. This provides a comprehensive methodological framework for collection and compilation of tourism statistics in all countries irrespective of the level of development of their statistical systems.

It uses the same concepts, definitions and classifications as national accounts (as set out in SNA 2008) and is the internationally recognised framework for measuring tourist activity and the importance of tourism to national (or regional) economies. While traditional tourism statistics focus primarily on ‘flows’ (number of visitors, number of overnight stays etc.), TSA can tell us how much tourism contributes to an economy and how many jobs it creates².

NISRA has produced a detailed methodology paper to sit alongside these results.

¹ The [System of National Accounts](#) (SNA) is the internationally agreed standard set of recommendations on how to compile measures of economic activity. The SNA describes a coherent, consistent and integrated set of macroeconomic accounts in the context of a set of internationally agreed concepts, definitions, classifications and accounting rules.

² [Tourism Satellite Accounts in Europe - 2023 edition \(europa.eu\)](#)

7 Further Information

Official Statistics

Official statistics are statistics produced by Crown bodies and other organisations listed within an Official Statistics Order, on behalf of the UK government or devolved administrations. They provide a factual basis for assessment and decisions on economic, social and environmental issues at all levels of society. This broad definition of official statistics means that the scope of official statistics can be adapted over time to suit changing circumstances.

NISRA is keen to engage and receive informed feedback from users which will improve the quality and value of the statistics. If you wish to join our Economic Accounts mailing list to keep informed of developments or provide any feedback on these statistics please email tourismstatistics@nisra.gov.uk.

For Further Information

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Glossary

The methodology for TSA is based on the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008) and, for tourism statistics in general, on the 2008 International Recommendations for Tourism Statistics (IRTS 2008).

Tourism Satellite Accounts

The purpose of tourism satellite accounts is threefold: to analyse in detail all aspects of demand for goods and services associated with the activity of visitors, to observe the operational interface with the supply of such goods and services within the economy and to describe how this supply interacts with other economic activities.

Visitor

A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips.

Tourist and same-day visitor

A visitor (domestic inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.

Inbound tourism

Inbound tourism comprises the activities of a non-resident visitor within the country of reference on an inbound trip.

Domestic tourism

Domestic tourism comprises the activities of a resident visitor within the country of reference either as part of a domestic trip or part of an outbound trip.

Internal tourism

Internal tourism comprises domestic tourism and inbound tourism, i.e. the activities of resident and non-resident visitors in the country of reference as part of domestic or international trips.

Outbound tourism

Outbound tourism comprises the activities of a resident visitor outside the country of reference either as part of an outbound trip or as part of a domestic trip.

Tourism expenditure

Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services as well as valuables for own use or to give away for and during tourism trips. It includes expenditure by visitors themselves as well as expenses paid for or reimbursed by others.

Tourism (direct) gross value added

Tourism gross value added adds the parts of gross value added generated by tourism industries and other industries of the economy that directly serve visitors in responding to internal tourism consumption. The use of the term 'direct' in this aggregate refers to the fact that the TSA measures only that part of value added (by tourism industries and other industries) due to consumption by visitors and leaves aside the indirect and induced effects that such consumption might generate.

Domestic tourism expenditure

Domestic tourism expenditure includes not only the expenditure of visitors on domestic trips, but also expenditure in the country of origin of visitors undertaking outbound trips. The economy benefiting from tourism expenditure is not always identical with the places visited during the trip. There is not always a strict relationship between the places visited and the economy/economies affected. For instance, not all expenditure associated with international trips occurs outside the visitor's economy of origin; in particular, some services might be acquired from producers in the country of origin or another country (international transport in particular, or any expenditure en route).

Domestic supply

Supply of goods and services by domestic industries, thus not supply via imports.

Tourism consumption

According to formal definitions, 'tourism consumption' is the same as 'tourism expenditure'. However, the concept of tourism consumption as used in the TSA goes beyond that of tourism expenditure. In addition to 'the amount paid for the acquisition of consumption goods and services as well as valuables for own use or to give away for and during tourism trips', which corresponds to monetary transactions (the focus of tourism expenditure), it includes services associated with holiday accommodation on own account, tourism social transfers in kind and other imputed consumption, such as the imputed rent of holiday homes or services paid by non-profit institutions for trips made by, for instance, groups of disabled people. The NISRA TSA includes information on second homes.

Gross fixed capital formation

Gross fixed capital formation is an important component of the description and analysis of tourism industries. It should be noted that, from an industry perspective, not only is gross fixed capital formation an important variable but transactions in non-

produced non-financial assets (such as land) and in non-produced intangible assets (such as landing rights) may also be important in a broader perspective.

Tourism collective consumption

Although collective non-market services have been excluded from tourism consumption, this does not mean that the measurement of expenditure by public administrations in the tourism-related fields of market promotion, information, planning, etc. is not relevant and that it does not have its place in the aggregate measurement of the economic importance of tourism.

Trip

A trip refers to travel by a person from the time of departure from his or her usual residence until he/she returns, i.e. a round trip. A trip can be made up of visits to different places. A same-day trip is a trip without an overnight stay; an overnight or tourism trip is one that includes at least one overnight stay.

Note on rounding in tables

Due to rounding, totals or subtotals are not always equal to the sum of the (rounded) components.