

# Background Evidence on the Movement of People across the Northern Ireland – Ireland Border

Department for the Economy

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# EXECUTIVE SUMMARY

## Introduction

The Common Travel Area (CTA) came into being in 1952. It covers the Republic of Ireland (ROI) and the UK (and the small island nations off the UK coast). Rather than being an international treaty or concrete agreement, the CTA exists as a collection of legal provisions in each of the relevant jurisdictions. These legal provisions enable UK and Irish nationals to be treated almost identically within both states.

Most of the important rights available to UK and Irish nationals under the CTA are duplicated in EU free movement/citizenship law. The UK and ROI joined the then European Economic Community (EEC) at the same time in 1973, however, when the UK exits the EU there could be potential problems, because the CTA will exist between one EU member and one non EU member. Currently, there are no EU Member States that offer non EU nationals better status in an EU Member State than EU nationals have. Agreement on the CTA will be required by all concerned parties.

In December 2017, in the EU/UK joint report on phase 1 of EU Exit negotiations, both parties committed to the continuation of the CTA and its associated rights and privileges. This reflects the normalised situation in Northern Ireland and ROI where the border does not create a barrier to how people live their lives. People travel freely between one country and the other for work, education, shopping or other purposes in the pursuit of their daily lives. This is enabled by over 300 border crossing points, which is in sharp contrast compared to the era of the Troubles, when only 20 official crossings were in operation.

This paper examines the extent of the movement of people across the Northern Ireland – ROI land border and the role it plays in the economies of Northern Ireland and Ireland. It also examines the movement of people between GB and ROI.

## Cross border movements

There is no one complete and definitive data source that records the number and purpose of all cross border movements between Northern Ireland, Great Britain and the ROI. Therefore a wide a range of sources are considered in order to examine the number, location and purpose of cross border trips. Following the analysis presented in this paper, further work continues around developing population estimates of cross border movements.

## Traffic data on key crossings

Traffic count data from 15 Northern Ireland and ROI border crossings provides an average figure of 118,000 daily vehicle crossings between Northern Ireland and ROI<sup>1</sup>. Since there are many more crossing points beyond those with traffic counters, the actual number of border crossings is likely to be materially higher. The traffic count figures equate to approximately 43 million annual cross border vehicle trips. The composition of the traffic flow in May 2017 was analysed and it consisted of around 87% cars, 7% light goods vehicles, 5% heavy goods vehicles and 1% buses or coaches<sup>2</sup>.

## Northern Ireland transport model analysis

The Northern Ireland transport model has been used to estimate additional origin and destination information and analysis on cross border movements between Northern Ireland and ROI.

The model estimates that there were 143,000 car and light good vehicles crossings each 12 hour period and an average of 19,600 HGV crossings. This estimate is higher than the Department of Infrastructure traffic count information, because the model covers all the cross border movements rather than a number of counts at the busier crossing points.

The vehicle crossings equate to 243,000 person crossings over the 12 hour period each day, when standard vehicle occupancy rates are applied to the vehicle crossings. This gives an annual estimate of 89 million person crossings for the 12 hour period each year. Extrapolating this figure for a 24 hour period would give an estimated annual total in the region of 110 million person crossings<sup>3</sup>.

## Bus and train

Translink, the main provider of public transport in Northern Ireland, estimates that in 2016/17 there were approximately 900,000 cross-border coach passenger journeys and 868,500 cross-border rail passenger journeys<sup>4</sup>.

## Sea and air

There were 12.8 million passenger flows between ROI and GB in 2016. After residents of ROI, GB residents were the second largest users of ROI airports accounting for just over 20% (6.6m) of all passenger flows to and from Irish airports. The majority of trips were between Dublin and the London Airports (almost 4 million passenger flows). Northern Ireland residents accounted for 1.02 million passenger flows at ROI airports (3%). In addition ROI residents accounted for 300,000 passenger flows through airports in Northern Ireland<sup>5</sup>.

In 2016 approximately 2.7m people travelled between ROI and GB sea ports<sup>6</sup>. This compares to 2.035m people who travelled by sea between Northern Ireland and GB sea ports in 2016<sup>7</sup>.

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<sup>1</sup> Department for Infrastructure Traffic Counter Information (2015), ANPR Traffic Camera Counts (2017), unpublished

<sup>2</sup> Department for Infrastructure (Northern Ireland) analysis, Unpublished

<sup>3</sup> Person border crossings estimates, Department for Infrastructure (Northern Ireland), June 2017. In addition to modelling cross-border road flows on the many routes not covered by the traffic counter network, this figure makes assumptions about the average occupancy level of vehicles crossing the Northern Ireland - Ireland border. The modelling indicates a total of 243,216 two-way cross-border person trips (or 162,663 vehicle crossings) over a 12hr period, which has then been scaled to a 24hr period by applying a factor of 1.25.

<sup>4</sup> Translink, Unpublished. Note the cross-border coach passenger journeys statistic includes journeys from a number of different operators.

<sup>5</sup> Northern Ireland Air Passenger Flow, NISRA, May 2017

<sup>6</sup> Provisional Sea Passenger Statistics 2016, Department for Transport, February 2017

## Cross border commuters

The exact number of people that cross the border to work or study is difficult to quantify. The Centre for Cross Border Studies has used a variety of studies to provide an estimate that there are between 23,000 and 29,000 people who commute across the border<sup>89</sup>. Based on the available information, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable. Engagement with stakeholders has highlighted the importance of cross border commuters in a range of sectors including retail, health, education and the wider business community. They also noted the importance of cross border travel in terms of the operation and delivery of their daily work.

The commuter patterns indicate 'hotspots' between Derry~Londonderry and Donegal and between Newry and Dundalk (located on the Dublin-Belfast axis). Other noteworthy interactions include Cavan and Enniskillen, Lifford and Strabane and Monaghan and Armagh.

## Commuting for education

There is a long history of pupils and students travelling across the border from ROI to attend schools and educational institutions in Northern Ireland. In 2015/16 almost 2,200 students from ROI attended higher education institutions in Northern Ireland (4.0% of the total)<sup>10</sup>. Around 1,900 students domiciled from the ROI attended further education colleges in campuses around the border areas, accounting for almost 6% of students at those colleges<sup>11</sup>. It is also the case at the school level that a number of pupils cross the border on a daily basis with flows going in both directions. In 2016/17 267 pupils resident in ROI attended post primary schools in Northern Ireland and 103 pupils attended primary school<sup>12</sup>. In 2015/16 191 pupils resident in Northern Ireland attended primary and post primary schools in ROI<sup>13</sup>.

## Cross border freight transport

Between 2011 and 2015 there were 2.6 million laden journeys between Northern Ireland and ROI by NI registered vehicles. 36.9 million tonnes were carried cross border. In 2015 there were 0.4 million laden journeys and 6.4 million tonnes carried cross border. This represented 10% of goods lifted by NI registered HGVs.<sup>14</sup>

In 2015 there were 3.9 million tonnes carried cross border by ROI registered vehicles. This represented 3.3% of goods lifted by ROI registered HGVs.<sup>15</sup>

## Tourism

In 2016 there were 1.4 million overnight trips from GB visitors to NI. 91% of GB visitors to NI arrived through NI sea and airports with the remaining 9% arriving via ROI. There were 456,000 overnight trips from ROI

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<sup>7</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/661355/final-sea-passenger-statistics-2016.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/661355/final-sea-passenger-statistics-2016.pdf) (Table SPAS0201)

<sup>8</sup> <http://borderpeople.info/wp-content/uploads/2016/06/Briefing-5-revision15June2016.pdf> and <http://ec.europa.eu/social/BlobServlet?docId=34598&langId=en> – the EU estimate of 29,000 is for UK-Ireland.

<sup>9</sup> See <http://www.crossborder.ie/pubs/eures-05-08-2010.doc> for 23,000.

<sup>10</sup> Enrolments at UK Higher Education Institutions: Northern Ireland analysis 2015/16, Department for the Economy (Northern Ireland), February 2017

<sup>11</sup> Northern Ireland Further Education Activity, Department for the Economy (Northern Ireland), August 2017. – regulated activity only

<sup>12</sup> Department of Education (Northern Ireland) analysis of Northern Ireland school census, 2017

<sup>13</sup> NI school Census; Parents Learners Database Section, Department of Education and Skills (ROI).

<sup>14</sup> Road Freight: CSRGT NI, 2014-2016, Department for Transport, 2016

<sup>15</sup> CSO Road Freight Transport Survey, Central Statistics Office, 2017

visitors to NI in 2016. Expenditure by GB and ROI visitors to NI was £386 million, which was 63% of all external visitor expenditure<sup>16</sup>.

In 2016 there were 3.7 million visits to Ireland from Great Britain made by Great Britain residents. In 2016 there were 2.63 million visits to Great Britain from Ireland by residents of Ireland<sup>17</sup>.

## Cross border shopping

Engagement with stakeholders reported that many people in the border areas will go to their nearest shops for convenience purchases. Many retailers on both sides of the border will accept payment in either Euros or Sterling as a way to attract customers. The exchange rate will impact on the direction of shopper flow.

## Cross border communities and co-operation

There is a long history of people on either side of the NI-ROI border living connected lives due to family ties and relationships. The Northern Ireland Census 2011 reported that there were 37,800 residents in Northern Ireland who were born in the Republic of Ireland (2% of the total NI population of 1.8 million). Of the 37,800 residents the largest numbers lived in Derry City and Strabane District Council (18%); Belfast City Council (16%); Newry, Mourne and Down and Fermanagh and Omagh District Councils (both 14%)<sup>18</sup>.

The Central Statistics Office's Census 2016 captured information on those people resident in the Republic of Ireland who were born in Northern Ireland. In 2016, there were 57,000 residents in the Republic of Ireland, who were born in the Northern Ireland (1% of the total population). Of the 57,000 residents, 27,000 (49%) lived in counties that shared a border with Northern Ireland<sup>19</sup>.

Derry City and Strabane District Council work closely with their counterpart in Donegal Country Council as do Newry, Mourne and Down District Council and the Louth Local Authorities to promote the economic development and competitiveness of the regions.

A number of public services are provided by NI institutions for people in ROI catchment areas. In the area of health and social care services, cancer treatment at Altnagelvin Hospital in Derry/Londonderry is provided for Irish patients, and children's cardiac care is provided on an all-Ireland basis in Dublin. Another example is the Western and Southern Health and Social Care Trusts, where a number of hospital services are provided on a cross-border basis. These services include renal, ENT, GUM and urology.

Closer social and economic integration across the border has been a longstanding policy objective of the UK, ROI and the EU. For example, the EU has provided funding of €432.2 million to support PEACE and economic development (INTERREG) projects on a cross border basis for 2014-2020.

## Cross Border Movements and Migrants

According to the 2011 Census there were 45,300 people from the EU26 and almost 36,000 people from the Rest of the World (ROW) living in Northern Ireland, which accounted for 4.5% of the total population. In the

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<sup>16</sup> Northern Ireland Annual Tourism Statistics 2016, NISRA, May 2017

<sup>17</sup> 'ONS ad-hoc data release on visits to Great Britain by residents of Ireland and visits to Ireland by residents of Great Britain, by purpose, 2002-2016', 14 August 2017.

<sup>18</sup> NISRA, Census (2011), CT0348NI. CT0348NI is the reference number for the data table. It can be retrieved from the NISRA website (<http://www.ninis2.nisra.gov.uk/public/AdvancedSearch.aspx?sk>).

<sup>19</sup> Central Statistics Office Census, 2016

2011 Census, migrants from the EU26 and ROW accounted for 6.2% of the residents aged 16 to 74 in employment<sup>20</sup>. This figure has grown and is estimated at 9.2%<sup>21</sup> in the more recent Labour Force Survey.

Given the work locations of migrants (i.e. 670 cross border workers<sup>22</sup>) and where they live in Northern Ireland (44% in district councils located next to the border, as reported in Table 18<sup>23</sup>), it is reasonable to assume that on annual basis EU26 and ROW migrants will make a significant number of cross border trips.

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<sup>20</sup> NISRA, Census (2011), CT0060NI

<sup>21</sup> NISRA, Labour Force Survey, July – September 2017

<sup>22</sup> <http://www.cso.ie/en/media/csoie/census/documents/north-south-spreadsheets/Census2011IrelandandNorthernIrelandwebversion1.pdf>

<sup>23</sup> NISRA, Census (2011)

# 1. INTRODUCTION

The Common Travel Area (CTA) is an arrangement that allows easy travel and other benefits between the UK, Ireland, the Channel Islands and the Isle of Man. The openness of travel between the UK and Ireland dates from 1922 when Ireland decided to enforce the same travel restrictions as the UK. Neither country required passports for travel from the other.

Following the Second World War, the UK's 1949 Ireland Act formalised the special relationship by declaring that Ireland, while no longer a dominion of the UK, is not a "foreign country"<sup>24</sup>. In 1952, the CTA came into being. The travel area covers the two states of Ireland and the UK (and the small island nations off the UK coast). Rather than being an international treaty or concrete agreement, the CTA exists as a collection of legal provisions in each of the relevant jurisdictions. These legal provisions enable UK and Irish nationals to be treated almost identically within both states. It is worth noting that the Good Friday Agreement<sup>25</sup> sets those born in Northern Ireland apart from other UK and ROI citizens in the CTA as they can have dual citizenship that is not dependent on any residency criteria.

The CTA is not an issue from the perspective of the EU, because most of the important rights available to UK and Irish nationals under the CTA are duplicated in EU free movement/citizenship law. In addition, the UK and ROI joined the then European Economic Community (EEC) at the same time in 1973. However, when the UK exits the EU there could be potential problems, because the CTA will exist between one EU member and one non EU member. Currently, there are no EU Member States that offer non EU nationals better status in an EU Member State than EU nationals have. Agreement on the CTA will be required by all concerned parties.

In December 2017, in the EU/UK joint report on phase 1 of EU Exit negotiations, both parties committed to the continuation of the CTA and its associated rights and privileges. This reflects life for many people living in Northern Ireland and the Republic of Ireland, where the UK ROI border is just a line on a map. It does not create a barrier to how they live their lives and people travel freely between one country and the other for work, education, shopping or other purposes in the pursuit of their daily lives.

The aim of this paper is to examine the extent of the movement of people across the Northern Ireland – ROI land border and the role it plays in the economies of Northern Ireland and Ireland. It also examines movements between GB and ROI. The paper sets out a number of key areas for movement in the Common Travel Area, as follows:

- Section 2 of the paper gives an overview of cross border movements.
- Section 3 gives an overview of the tourism market, highlighting the cross border flows.
- Section 4 provides an analysis of cross border shopping.
- Section 5 details the cross border community ties and cooperation between Northern Ireland and the Republic of Ireland.
- Section 6 provides an overview of migration in Northern Ireland and migration flows between ROI and the UK.
- Section 7 provides a summary of the findings.

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<sup>24</sup> de Mars, Murray, O'Donoghue and Warwick, (January 2017). The Common Travel Area: Prospects After Brexit.

<sup>25</sup> Constitutional issue 1 (vi) "recognise the birthright of all the people of Northern Ireland to identify themselves and be accepted as Irish or British, or both, as they may so choose, and accordingly confirm that their right to hold both British and Irish citizenship is accepted by both Governments and would not be affected by any future change in the status of Northern Ireland". [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/136652/agreement.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/136652/agreement.pdf)

## 2. CROSS BORDER MOVEMENTS

### 2.1 Overview

There is no one complete and definitive data source that records the number and purpose of all cross border movements between Northern Ireland, Great Britain and the Republic of Ireland. Therefore this section uses a range of data sources to examine the number, location and purpose of cross border trips. This section is arranged in the following sub-sections:

- Traffic Count Information.
- Northern Ireland transport model analysis.
- Cross border bus and rail passenger journeys.
- Magilligan to Greencastle ferry service.
- Cross Border travel to airports.
- Movement of people by sea.
- Analysis of mobile phone network connections.
- Commuting for Work.
- Education.
- Freight Transport.

### 2.2 Traffic Count Information

There are currently more than 300<sup>26</sup> formal and informal border crossing points between Northern Ireland and ROI. This compares to only 20 official crossing points during the Troubles<sup>27</sup>.

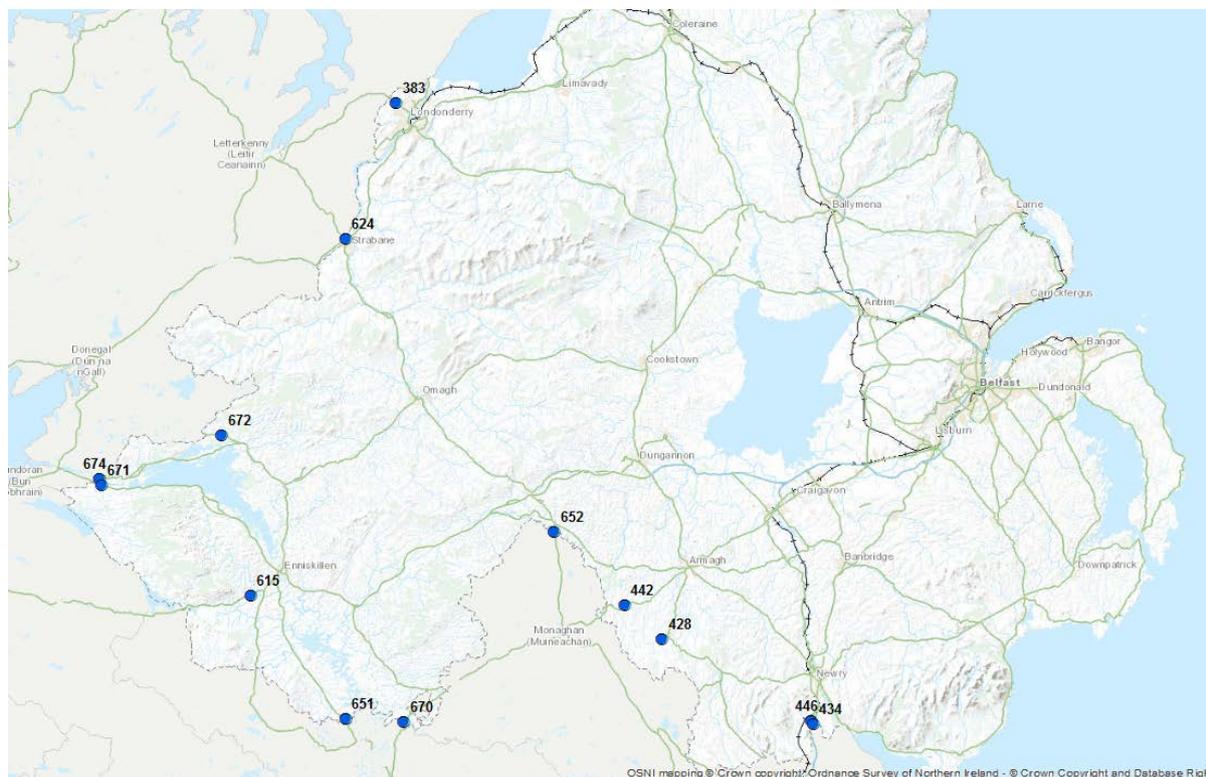
The Department for Infrastructure has traffic counters located at 13 locations in Northern Ireland, which are in close proximity to the border, and on unique routes, to measure the cross border traffic flows. Two further locations are included using Automatic Number Plate Recognition (ANPR) traffic camera data. These sites cover many of the main border crossing points. There is no Northern Ireland traffic count data for the many smaller crossing points. Therefore, the reported traffic flows on these 15 routes will be an underestimate of the actual total. Figure 1 shows the location of the traffic counters. The ANPR traffic camera locations are not illustrated.

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<sup>26</sup> Anderson, D (13 December 2016), Brexit and the Border. Available at: <https://brexitdotlaw.files.wordpress.com/2017/01/brexit-and-the-border-1212.pptx>. [Accessed 23 May 2017].

<sup>27</sup> Reported by BBC (May 2017) [http://www.bbc.co.uk/news/resources/idt-sh/The\\_hardest\\_border](http://www.bbc.co.uk/news/resources/idt-sh/The_hardest_border)

**Figure 1: Location of NI Road Traffic Counters in Northern Ireland**



Source: Department for Infrastructure

The average daily traffic flow from both sources is presented in Table 1. It provides the count information in both directions, and the overall total.

**Table 1: Average daily (24 hour) Traffic Flows**

	Full week
<b>Northbound ADF</b>	58,870
<b>Southbound ADF</b>	59,200
<b>Total ADF</b>	118,070
<b>% Northbound</b>	49.9%

Source: Department for Infrastructure Traffic Counter Information (2015), ANPR Traffic Camera Counts (2017), unpublished

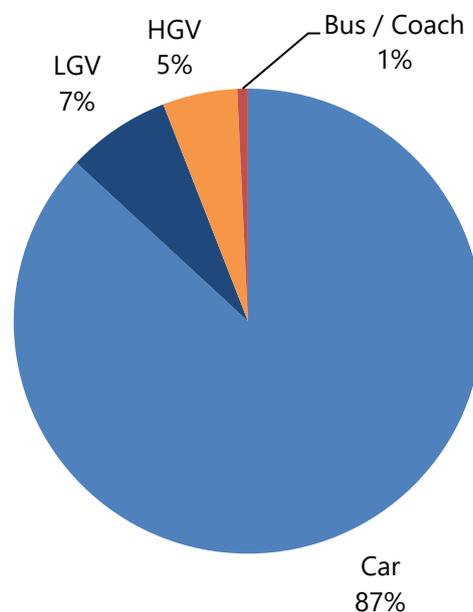
On average, just over 118,000 vehicles crossed the border each day over a full 24 hour period. The split between northbound and southbound traffic flows is fairly even, with approximately 59,000 trips in each direction (i.e. NI – ROI and ROI – NI). The major crossing points are at Newry, Derry~Londonderry and Strabane and they accounted for 71% of the recorded daily cross-border traffic flows. This would suggest an NI-ROI average cross-border flow of at least 118,000 1 way trips or approximately 59,000 return vehicle journeys. Based on this average it is estimated that there were a minimum of 43 million vehicle crossings each year at these 15 border crossings.

These figures do not identify the origin and destination or purpose of the trips, nor do they identify the number of unique vehicles making these crossings. For example, one vehicle could make multiple return trips across the border on any given day. In addition on one journey a vehicle could cross the border on multiple occasions. The BBC reported the case of one journey on one road that crossed the border four times<sup>28</sup>.

### Cross border traffic by vehicle type

Figure 2 illustrates the composition the traffic crossings by vehicle type in 2017 based on Department for Infrastructure (NI) analysis. The flow consisted of around 87% cars, 7% light goods vehicles, 5% heavy goods vehicles and 1% buses or coaches<sup>29</sup>.

**Figure 2: Cross border traffic by vehicle type in May 2017 (%)**



Source: Department for Infrastructure

## 2.3 Northern Ireland transport model analysis

The Northern Ireland transport model has been used to estimate additional origin and destination information and analysis on cross border movements between Northern Ireland and ROI.

The model was created using a wide range of data and research for people movements both in Northern Ireland and to and from ROI, especially the Journey to Work and Place of Education data sourced from the 2011 Census. In addition, it draws on traffic count information from 42 border crossing points between Northern Ireland and ROI. These traffic count figures give 2 way traffic flows of 186,000 car and light good

<sup>28</sup> [http://www.bbc.co.uk/news/resources/idt-sh/The\\_hardest\\_border](http://www.bbc.co.uk/news/resources/idt-sh/The_hardest_border)

<sup>29</sup> Department for Infrastructure (Northern Ireland) analysis, Unpublished

vehicles crossings<sup>30</sup> and 17,000 HGV flows for each 12 hour period. These figures are higher than the traffic count information presented earlier, because the model encompasses all the cross border movements rather than a number of counts at the busier crossing points. A map illustrating these crossing points is provided in Figure 16 in Annex 1.

The model estimates the average number of daily crossings for the 12 hour period (7am to 7pm) which captures the large majority of traffic movements. While the model was not developed specifically for the purposes of estimating the volume of cross border traffic flows, it has been checked against recent traffic counts undertaken at (or close to) the border<sup>31</sup>.

The model estimates that there were 143,000 car and light good vehicles crossings each 12 hour period and 19,600 HGV crossings. The vehicle crossing estimates equate to 243,000 person crossings over the 12 hour period each day, when standard vehicle occupancy rates are applied. Figure 17 in Annex 1 provides details on these occupancy rates. This gives an annual estimate of 89 million person crossings for the 12 hour period each year. Expanding this figure for a 24 hour period would give an estimated annual total in the region of 110 million person crossings<sup>32</sup>.

The following paragraphs report the spread of origins and destinations for traffic crossing the border, as estimated by the transport model.

Figure 18 in Annex 1 uses a heat map (i.e. the share of trips to a destination in ROI relative to the total trips to ROI) to illustrate the destinations for NI cars and light goods vehicle trips in ROI. 86% percentage of these trips are to destinations located in the areas next to the border. North Donegal is the most popular destination for trips from Northern Ireland. Figure 19 in Annex 1 illustrates the main destinations HGV trips to ROI. Dublin, the South East and Dundalk account for 47% of HGV trips to ROI.

Figure 20 in Annex 1 illustrates the main destinations for ROI cars and light goods vehicle trips to Northern Ireland. The top four destinations are the old district council areas for Derry City, Fermanagh, Newry and Strabane and they account for 75% of these trips. Belfast was the fifth most popular destination with 5% of trips ending there. Figure 21 in Annex 1 illustrates the main destinations HGV trips from ROI to NI. The top five destinations are Belfast, Newry, Lisburn, Dungannon and Enniskillen and they account for 59% of all destinations for these HGV trips.

## 2.4 Cross border bus and rail passenger journeys

Translink estimates that in 2016/17 there were approximately 900,000 cross-border coach passenger journeys. Table 2 provides the number of cross-border train passenger journeys as recorded by Translink<sup>33</sup>. In 2016/17 there were 868,532 cross border rail passenger journeys.

There was a three per cent decrease in the number of cross border rail passenger journeys between 2014/15 and 2016/17.

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<sup>30</sup> Each crossing is a single trip. A return journey would involve two crossings.

<sup>31</sup> Analysis of border crossing point data in the NI Traffic model compared to traffic count information for 2015, show that the 2015 figures are comparable with the traffic count figures in the model. The model figures were on average of 3% higher than the count information in 2015.

<sup>32</sup> Person border crossings estimates, Department for Infrastructure (Northern Ireland), June 2017. The factor for converting 12 hour traffic data to 24 traffic data in the Northern Ireland Transport Model is 1.25. This figure was stress tested by examining traffic count data at locations that collected 24 hour data. On average, at 13 crossing point the average conversion factor was estimated to 1.28. (Note – the conversion factor = 24 hour count data / 12 hour count data).

<sup>33</sup> Translink is the main provider of Public Transport in Northern Ireland.

**Table 2: Cross Border Rail Journeys provided by Translink**

Year	2014/2015	2015/2016	2016/2017
Rail Journeys	841,392	809,748	868,532

Source: Translink

## Enterprise rail users

According to customer research conducted by Translink, 40% of the Enterprise cross border train passengers in 2016 were travelling for business purposes, with 60% travelling for leisure purposes.

During 2016, 25% of Enterprise passengers were classed as high frequency<sup>34</sup> users, compared to 28% who were medium frequency users. 47% of passengers were defined as low frequency users of the service.

41% of passengers travelling on the service for business purposes were doing so weekly. Only 8% of leisure passengers travelled on a weekly basis. 21% of leisure travellers did so on a monthly basis and 34% were once a year. There was no customer research conducted for cross border bus users.

## 2.5 Magilligan to Greencastle ferry service

Another example of cross border traffic is the Magilligan Greencastle ferry, which provides a seasonal inshore ferry service across Lough Foyle between Magilligan in Northern Ireland and Greencastle in ROI. In 2016 the ferry operated between July – September.

In the 3 months it was operational in 2016, it carried over 23,000 vehicles (primarily cars) and associated passengers, and over 2,000 foot passengers<sup>35</sup>. In July 2017, a ferry service began operating between Greencastle and Greenore, across Lough Carlingford.

## 2.6 Cross Border travel to airports

### Movement of people via NI Airports

The latest results from the Northern Ireland Passenger Survey shows that in 2016 8.10m journeys were made into and out from Northern Ireland's (NI) airports. This equates to approximately 4.05m individual passengers<sup>36</sup>.

Figure 3 shows the share of users by country of residency. Northern Ireland residents were the largest users of NI airports accounting for almost 58% (4.67m) of passenger flows in 2016. Great Britain (GB) residents are the second largest users of NI airports accounting for just over a third (2.63m) of passenger flows. Residents from ROI accounted for almost 4% (0.3m) of passenger numbers in 2016.

<sup>34</sup> Frequency definitions: High: Thirty-seven or more journeys per year. Medium: Between five and thirty-six journeys per year. Low: Less than five journeys per year.

<sup>35</sup> Causeway Coast and Glens Council, 2017

<sup>36</sup> <https://www.nisra.gov.uk/publications/northern-ireland-air-passenger-flow-publications>

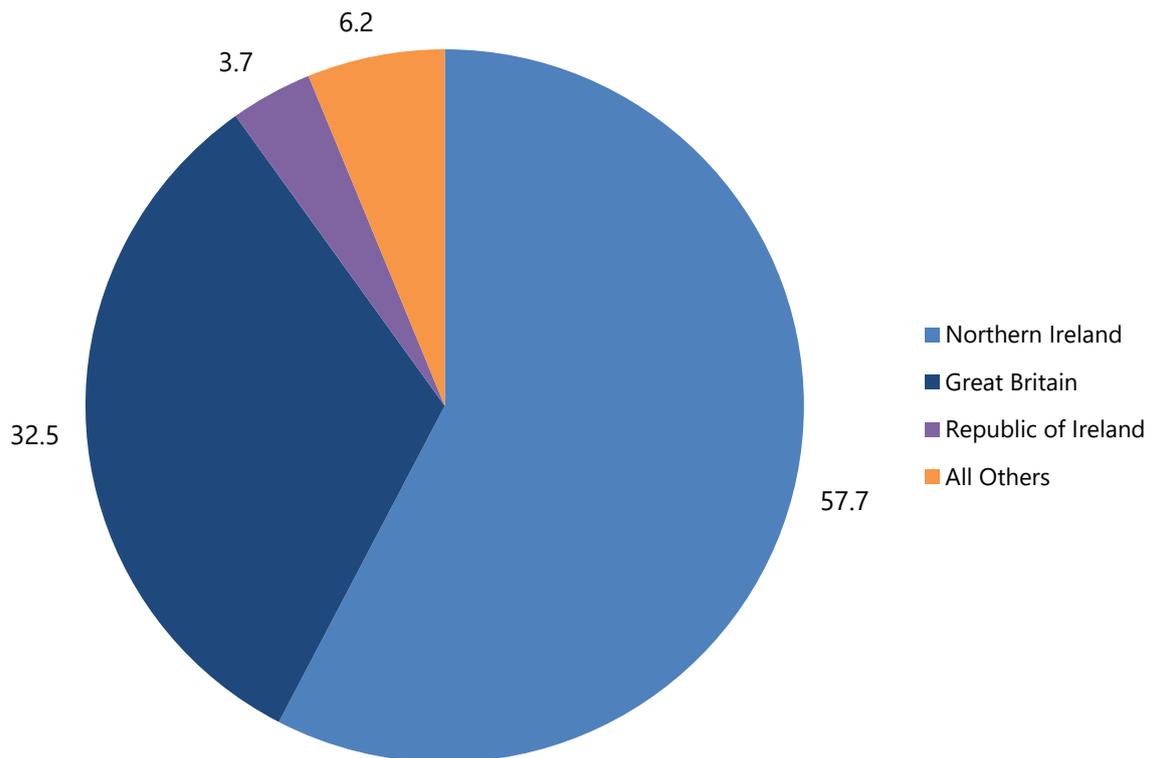
Please note that departing passenger figures are from NIPS/CRS. The methodology includes the assumption incoming passengers mirror outgoing passengers. Therefore figures are based on 'passenger flow' assuming that on average passengers return to the same airport they depart from.

Passenger Flow relates to an estimate of passengers both IN and OUT - these figures should not be doubled up. To give an estimate on the number of individuals, they may be halved, however it's important to note that a person may take more than one flight. UK Domestic flights (UK to UK) are recorded at both airports, so there is an element of double counting. For example, passengers onboard a flight from Heathrow to Edinburgh will be recorded at both airports.

Belfast International Airport was the most popular airport for NI passengers with almost 69% travelling through the international compared to just over 29% through Belfast City Airport and only 2% through City of Derry Airport.

Air passenger flow statistics show that on a rolling annual basis from April 2015 to March 2016, 58% of people using the Belfast International Airport did so for holiday purposes with 21% using it for business purposes, 18% using it to visit friends and family and 3% for other reasons.

**Figure 3: NI Airport Passenger Numbers by Residency in 2016 (%)**



Source: NISRA NI Air Passenger Flows<sup>37</sup>

In 2016 300,000 passenger flows were made by ROI residents via Northern Ireland Airports, with almost 17% (50,000) of them via the City of Derry Airport. These passenger flows accounted for nearly 18% of all traffic through the City of Derry Airport. In comparison ROI passengers accounted for almost 2% of Belfast City Airport’s passenger flows and almost 4% of Belfast International airport passenger flows.

In 2016 there were approximately 6.25m passenger flows by air between Northern Ireland and GB, an increase of over 8.5% over the year and almost 15% over the last two years. Outside of GB, Spain is Northern Ireland’s largest market with 921,168 passenger flows in 2016 followed by Portugal (203K), Netherlands (163k), and France (117k)<sup>38</sup>.

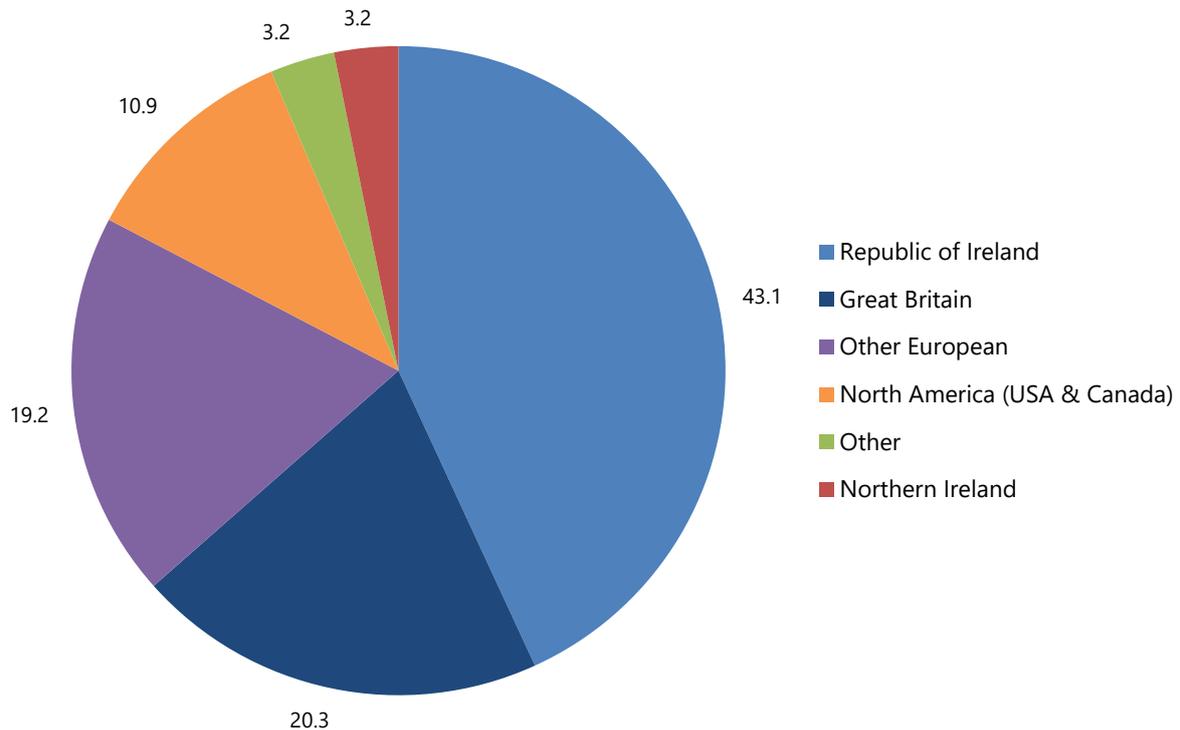
<sup>37</sup> <https://www.economy-ni.gov.uk/publications/northern-ireland-air-passenger-flow-publications>

<sup>38</sup> <https://www.nisra.gov.uk/publications/northern-ireland-air-passenger-flow-publications>

## 2.7 Movement of people via ROI Airports

In 2016 there were 32.6 million air passenger flows through airports in ROI. ROI residents accounted for over 43% (14.0m) of passenger flows, GB residents were the second largest users of ROI airports with just over 20% (6.6m) of all passenger flows (see Figure 4 below). Other European passengers accounted for just over 19% (6.3m) of passenger flow numbers in 2016. Northern Ireland residents accounted for 1.02 million passenger flows.

**Figure 4: ROI Airport Passenger Numbers by Residency (2016)**



Source: CSO Passenger Flows<sup>39</sup>

### ROI - UK Passengers

There were 12.8 million passenger flows between ROI and GB in 2016. Data from the Central Statistics Office show that England was the main destination for passengers between ROI and the UK and accounted for over 88% (5.6m) of all passengers flying to England in 2016.

The UK as a whole is a growing market for ROI passengers and numbers increased by over 32% between 2013 and 2016. Whilst England is the largest destination for ROI, passengers to Wales have grown by 90% from 2013 to 2016 and to Scotland by almost 50%.

London Heathrow to Dublin airport was the most popular route for passengers in 2016 with 1.75m people travelling to and from Dublin. London Gatwick was the second most popular route into Dublin (1.31m)

<sup>39</sup> <https://www.economy-ni.gov.uk/publications/northern-ireland-air-passenger-flow-publications>

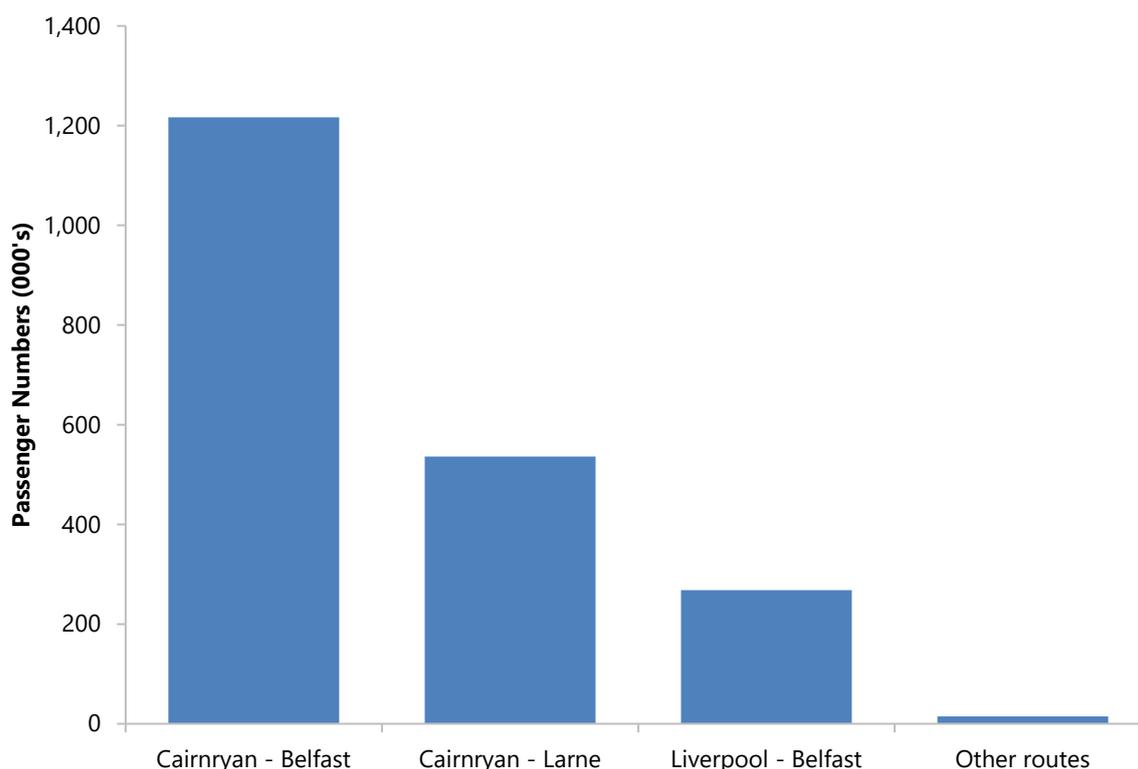
followed by Manchester with 0.98m people flying into and out from Dublin. Birmingham was 5th (0.93m) and London Stansted was the 6th most popular route (0.92m) in 2016<sup>40</sup>.

## 2.8 Movement of people by sea

### NI and GB Sea Ports

The sea passenger statistics from the Department for Transport (DfT) show that in 2016, 2.035m people travelled by sea between Northern Ireland and GB sea ports. 60% of all passengers were travelling on the Cairnryan to Belfast route (see Figure 5).

**Figure 5: GB and NI Sea Passengers by crossing in 2016**



Source: Department for Transport<sup>41</sup>

Over the last ten years sea passenger numbers between GB and Northern Ireland have decreased by almost 10% from 2.26m in 2006 to 2.04m in 2016.

### ROI to GB Sea Ports<sup>42</sup>

In 2016 approximately 2.7m people travelled between ROI and GB sea ports, which was a 2% decrease on 2015. The Holyhead - Dublin Route was the most popular route with almost 70% of traffic using this route in 2016. Passenger numbers on the Holyhead-Dublin route decreased by 2 per cent to 1.9 million compared with 2015. This is a similar pattern to falling passenger numbers on the other West Coast routes with the Irish Republic.

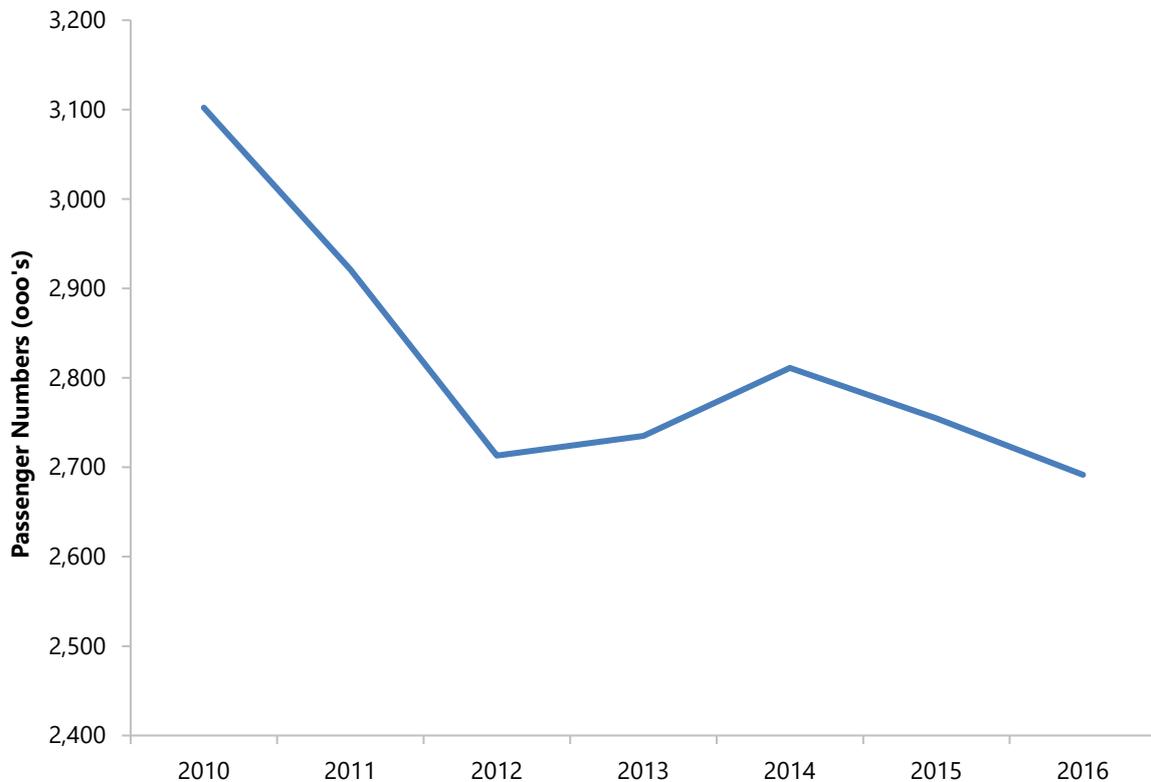
<sup>40</sup> <https://www.nisra.gov.uk/publications/northern-ireland-air-passenger-flow-publications>

<sup>41</sup> <https://www.gov.uk/government/collections/maritime-and-shipping-statistics>

<sup>42</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/661355/final-sea-passenger-statistics-2016.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/661355/final-sea-passenger-statistics-2016.pdf)

The overall traffic between GB and ROI has decreased by 16% (from 2006 to 2016). Fishguard to Rosslare was the most impacted route, with passenger numbers down by 49%.

**Figure 6: Sea Passengers from GB to ROI**



Source: Department for Transport<sup>43</sup>

## 2.9 Commuting for Work

The exact number of people that cross the border is difficult to quantify. The Centre for Cross Border Studies has used a variety of studies to provide an estimate that there are between 23,000 and 29,000 people who commute across the border<sup>44 45</sup>.

These figures are higher than the statistics reported in the 2011 Censuses for NI and ROI. They report that a total of 14,800 persons regularly commuted between the Northern Ireland and ROI to their main place of work or study. However due to how the question in the Census is asked<sup>46</sup>, these figures will exclude self-employed people e.g. freight drivers, builders who work on both sides of the border or do not have a fixed place of work for example. They will also exclude people who work/study mainly from home but are occasional cross-border travellers (such as those working in sales or construction). Therefore, the difference in the estimates produced in the Censuses and the estimate from the Centre for Cross Border Study research can be explained by the different methodologies and questions asked.

<sup>43</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/661355/final-sea-passenger-statistics-2016.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/661355/final-sea-passenger-statistics-2016.pdf)

<sup>44</sup> <http://borderpeople.info/wp-content/uploads/2016/06/Briefing-5-revision15June2016.pdf> and <http://ec.europa.eu/social/BlobServlet?docId=3459&langId=en> – the EU estimate of 29,000 is for UK-Ireland.

<sup>45</sup> See <http://www.crossborder.ie/pubs/eures-05-08-2010.doc> for 23,000.

<sup>46</sup> <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/2011-census-household-questionnaire.pdf> - Question 43.

According to the two 2011 Censuses, a greater number of people commuted from the Republic of Ireland to Northern Ireland with 6,500 travelling to ROI from NI and 8,300 travelling from ROI to NI. Any restriction in travel across the border, such as identity checks, could have negative consequences for the commuters as well as their employers<sup>47</sup>. This is borne out by a local case study (see Case Study 1).

The ROI Census in 2016<sup>48</sup> recorded 9,336 people who crossed the border for work and school, a decrease of 2% on the 2011 figure of 9,536. Workers made up three quarters, 7,037 of commuters, up 10%, while students accounted for the remainder (2,299 down 26%).

Donegal accounted for the largest number of cross border commuters, with 5,600 commuters, 76 per cent of whom travelled to Co. Derry. The counties of Monaghan (1,112), Louth (926) and Cavan (493) also had substantial numbers who crossed the border to work and school.

The most frequent destination of commuters across the border was Co. Derry with over 4,320 commuters who stated this as their commuting destination. Just over 1,200 commuters travelled to County Tyrone, with just over a 1,000 travelling to County Armagh.

The consolidated border counter traffic information (presented earlier in this section) indicates that there are on average 118,000 border crossings each day from the crossings where counters are in place, which could be interpreted as 59,000 return trips. While these figures will include cross border shoppers, tourists crossing the border and people visiting family and friends, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable.

Engagement with local stakeholders has highlighted the importance of cross border workers. Derry City and Strabane District Council conducted small straw poll of some public sector employers in the North West of Northern Ireland, which found that between 5 and 33% of employees live in ROI. They indicated that the weighted average returns of 6% "felt like a significant underestimate" compared to their perception of the true number.

They commented that over the past 10-15 years there has been a large number of people from Derry~Londonderry who have moved to live in the towns and villages in Donegal in close proximity to the border while continuing to work in NI. This was reflected in the CSO Census 2011 data on the percentage of those born in the UK who are resident in the Republic of Ireland which ranged from 20% to over 60% in the closest border settlements. It has been reported<sup>49</sup> especially in relation to accessing education that some of them retain living addresses (usually at their parents or grandparents) so called 'grannyng' in Northern Ireland so that they retain access to certain services such as education and health care, hence the official statistics may reflect their "official" rather than the actual addresses.

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<sup>47</sup> European Union Committee Brexit: UK-Irish relations (2016)

<https://www.publications.parliament.uk/pa/ld201617/ldselect/lducom/76/7602.htm>

<sup>48</sup> [http://cso.ie/en/media/csoie/newsevents/documents/census2016profile6-commutinginireland/Cross\\_Border\\_Commuters\\_2016\\_v2.pdf](http://cso.ie/en/media/csoie/newsevents/documents/census2016profile6-commutinginireland/Cross_Border_Commuters_2016_v2.pdf)

<sup>49</sup> <https://www.irishtimes.com/news/rejected-girls-get-right-to-attend-school-1.964494>

### **Case Study 1 – Cross Border Workers<sup>50</sup> study: John Friel, Visual Edge Signs and Printing, Strabane**

John Friel is the FSB Regional Chair for Northern Ireland and has two businesses, one is based in Northern Ireland and the other in ROI.

The ROI business manufactures PVC and aluminium windows and doors. It employs around 30 people, and 20 cross from Northern Ireland to the Republic each day. John noted there is a long tradition of moving across the border, despite the old check points of the past. When a vacancy was advertised with the local Jobcentre in Northern Ireland it is automatically also advertised in ROI.

He commented that returning to the borders of the past would be disastrous, and Northern Ireland would suffer the worst of it. "It's not just the inconvenience or loss of business, but it would mean a loss of jobs, skills and mobility; all of which affect the bottom line and, for small businesses, it can mean the difference between thriving and surviving."

His main business in Strabane in Northern Ireland designs and develops products for the signage industry. Most sales are business to business, with some of the smaller products available to buy online. He said "at present, nine of my workers in my signage business cross the border daily from the Republic. We are a highly mobile workforce, which means the ability to freely and quickly cross the border is essential to our success. We can often turn around a job overnight, deliver it, assemble it on site, and then travel back within 24 hours. The same job would have taken three days a few years ago."

### **Case Study 2: Recruitment Agency in Derry~Londonderry**

The company are a Recruitment Agency in Northern Ireland with offices located in Belfast, Derry~Londonderry (their largest branch), Coleraine, Ballymena and Omagh. They are one of the largest companies working in the healthcare sector and 90% of their turnover is derived from this sector. They employ 30 staff.

They provide recruitment services for permanent staff and manage the placement of temporary staff. In the health and social care sector they provide services for public, private and third sector organisations. They place staff in hospitals, nursing/residential homes, day-care / respite facilities, domiciliary service, learning difficulties units, challenging behaviour units and all aspects of social care. They employ workers on temporary (3-6 month contracts) and place them into roles for their clients. They get a pipeline of vacancies from their clients, which they need to fill.

They have been successful in filling vacancies, by recruiting staff from outside Northern Ireland. 70% of their workers are from Northern Ireland/GB, 5% travel across the border with ROI each day, with 23% of workers coming from the rest of the EU. 2% of their workers are from outside the EU.

Their flexible approach to recruitment has resulted in the company growing with turnover increasing by almost 50% to just over £11 million in the last financial year. They are able to fill vacancies quickly and efficiently, because they have specialised staff and efficient processes for recruiting and managing contracts for temporary workers and they are able to cast the net widely for potential recruits.

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<sup>50</sup> Adapted from FSB April 2017A Skilful Exit – What small firms want from Brexit.

### Demand for staff

The MD commented that temporary staff are needed in the healthcare sector because providers cannot fund full time permanent staff for all roles. They also need to cover to fill gaps in the system e.g. holidays / sickness. Due to the extent of pre-employment vetting and compliance with the regulatory requirements, those organisations are unable to quickly provide staff to meet fluctuating service requirements. Therefore, access to agency staff, who are fully vetted, trained and able to work, is essential to the continuity of care for the healthcare sector.

### Impact of Brexit

Their current operations have not been impacted by Brexit but they have put future investment plans on hold. They had been working with the British Council to partner with a Recruitment Agency in Romania to recruit nurses/ other care sector staff, but they have shelved these plans due to uncertainties over the EU workers.

Any outcome that makes it significantly more difficult for EU workers to work in the UK or cross the NI-ROI border will have a negative impact on the business. There is a risk that their flexibility to place staff quickly and efficiently is reduced, which could result in them losing contracts. For example, one of their contracts requires 100% of vacancies to be filled. If such contracts were lost then there would be a decline in turnover and employment at the company.

The 2011 Census data show that the original and destination of cross border commuters were largely centred around the border regions, which can be seen from the maps (Figures 22 and 23) in Annex 1.

In terms of employment, the most important industry for cross border commuters was wholesale and retail, accounting for 16% of people travelling from ROI to NI and for 14% of people travelling from NI to ROI. Together, Education and health services accounted for 28% of those who commuted from ROI to NI and 22% of those commuting from NI to ROI<sup>51</sup>.

Cross border commuters were proportionately more likely to be working in Managerial and Professional roles. Together, Managers, Directors and Professionals accounted for 44% of workers commuting from NI to ROI and 38% of workers commuting from ROI to NI.

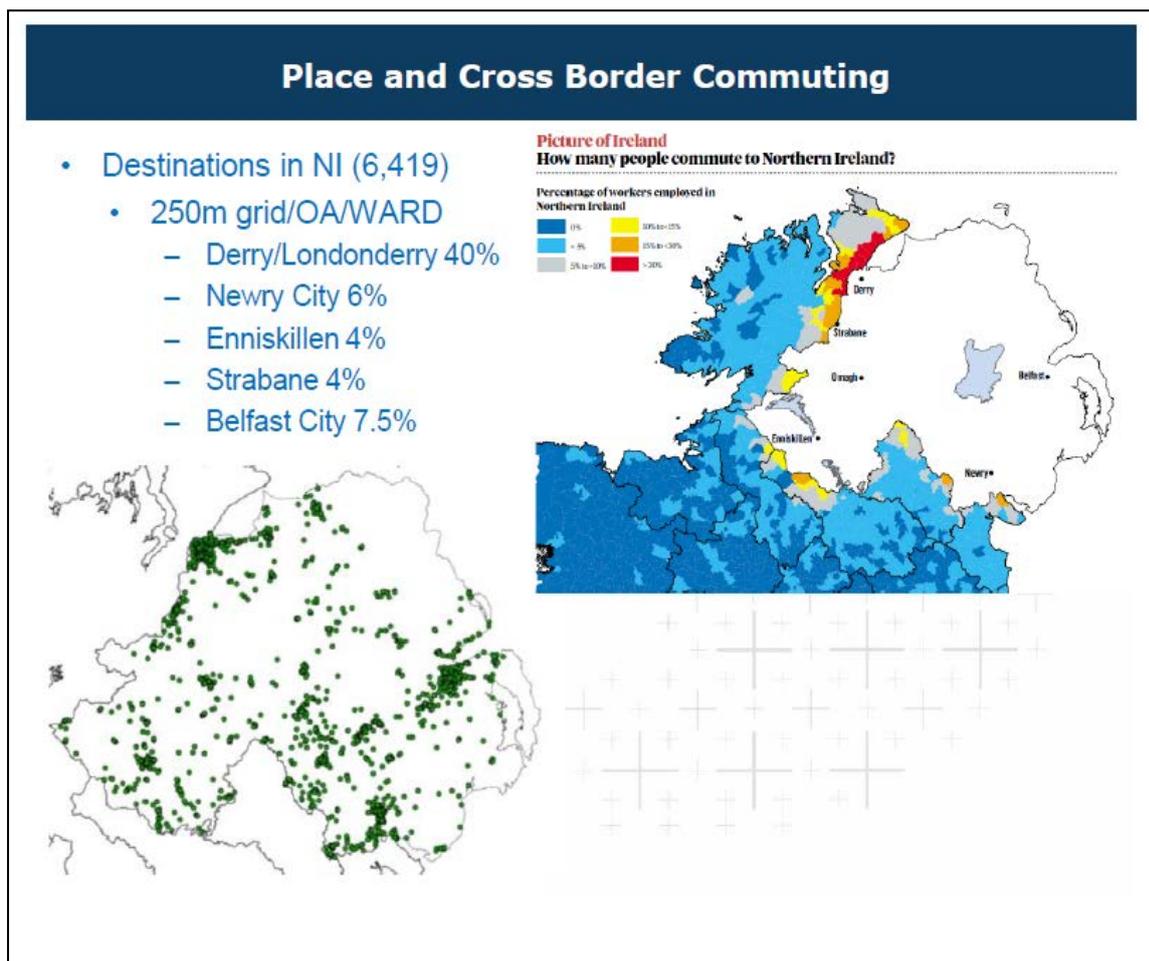
The majority of the cross border commuting hotspots are located close to the border with Derry~ Londonderry, Newry, Enniskillen, Strabane accounting for 58% of commuters to Northern Ireland in the 2011 Irish Census<sup>52</sup>. Interestingly, 7.5% of Irish commuters travelled to Belfast, which is at least 1 hour from the border by road or rail outside of peak commute times. This indicates that cross border commuters are important to not just the border towns and cities in Northern Ireland. Figure 7 illustrates the cross border commuting patterns from ROI to Northern Ireland in 2011.

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<sup>51</sup><http://www.cso.ie/en/media/csoie/releasespublications/documents/population/2011/Cen2011IrelandNorthernIreland.pdf>

<sup>52</sup> <http://iclr.org/2017/03/22/ireland-2040-the-national-planning-framework-npf-in-an-all-island-context/>

Figure 7: Cross Border Commuting Patterns ROI to Northern Ireland 2011



Source: All-Island Research Observatory<sup>53</sup>

Commuter patterns indicate 'hotspots' (high levels of interaction at a number of cross border routes) between Derry~Londonderry and Donegal and between Newry and Dundalk (located on the Dublin-Belfast axis). Other noteworthy interactions include Cavan/Enniskillen, Lifford/Strabane and Monaghan/Armagh.

<sup>53</sup> Ireland 2040: The National Planning Framework in an All-Island Context. People and Place – the Current State of Play Presentation at Ulster University Magee Campus 10<sup>th</sup> March 2017.

### **Case Study 3 – Northern Ireland Recycling Company located near the border**

The company recycles thousands of tonnes of household rubbish from across the UK and Ireland. The business has grown out of the implications of the European Waste Framework Directive (2008/98/EC) and the subsequent UK legislation. The business has invested heavily in ensuring high standards in its processing and has developed one of the most advanced materials recovery facilities in Europe.

It employs approximately 170 staff of whom around 120 are non-UK nationals. Access to a suitable workforce, which cannot be recruited locally, is key to the company's business model.

The business has gone from nothing in 2004 to a turnover in excess of £22 million in 2016. Its recycling inputs are derived from recycling contracts from across the UK and Ireland. They are 40% in Scotland, 30% in Ireland, with 15% each in England and Northern Ireland.

Its outputs are to Waste-to-Energy schemes in Europe and commodity export: e.g., plastic, metal and paper to a range of countries including some outside the EU such as Turkey, Indonesia and China.

They are highly reliant on non-UK nationals as there is not an appetite from local people for this type of work. The company has recently employed the services of an immigration expert to talk to their staff and start the process, for those interested, of applying for UK citizenship. There has been significant uptake, particularly among those who have settled more permanently in and around the Newry area. The company has undertaken to pay part of the application.

The biggest initial worry was that of tariff and border implications. The MD said "What we did first was talk to older generations... and there were stories of vehicles being there for hours and the ridiculous time wasted on checkpoints." The company is still considering whether or not it is advantageous to re-site partially in England to deal with its contracts there.

The company employs a significant fleet of vehicles and there are implications for movement across the border. From a waste perspective there already is a border as they are charged about £200,000 a year by authorities in Northern Ireland and the Republic to monitor the waste that is moved across the border. There is a concern that they could face additional charges particularly between Northern Ireland and the rest of the UK and this may further inform decisions on relocation.

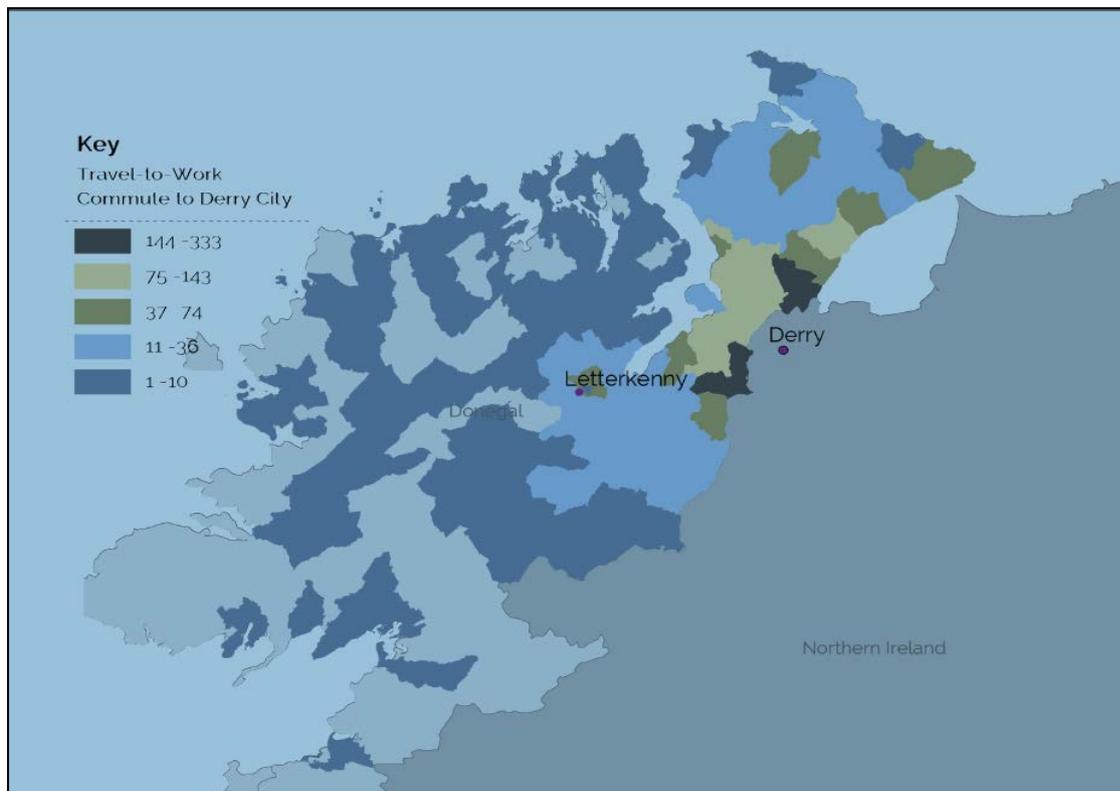
The MD said "We cross the border all the time, and we already deal with some of these issues, telling the authorities three days in advance of our movement. Our regulator no longer stands on the border. He or she is in an office and checking is done by audit or digitally. But now overall we do not know what the shape of any new border will be and what it will look like."

Source: <http://www.intertradeireland.com/media/InterTradeIrelandBrexitcasestudiesUpdate18thMay-4.PDF>

The Letterkenny Gateway report records strong interconnectivity between Donegal and Derry~Londonderry. Figure 8 indicates the strength of this relationship with respect to the share of the workforce in County Donegal that commutes to Derry~Londonderry (in 2011). This percentage invariably ranges but, at its most significant, links in excess of 30% of the working population in area of Donegal to Derry~Londonderry, in 2011. Some of the areas where the trend is most extensive include those areas closest to the border, such as

Kilderry where, of 686 people in the workforce, 333 or 48.5% commute to Derry~Londonderry, while in Killlea, of 543 people in the workforce, 261 or 48% commute to Derry~Londonderry.

**Figure 8: Cross Border Commuting Patterns Donegal to Derry~Londonderry in 2011**



Source:

The Letterkenny Gateway Report 2013<sup>54</sup>

## 2.10 Education

This section provides information on the following areas:

- ROI students studying in Northern Ireland.
- ROI students studying in GB.
- GB students studying in ROI.

### ROI students studying in Northern Ireland

The following paragraphs provide details on the total and share of non Northern Ireland pupils at each type of institution.

#### *Higher Education*

As reported in Table 3, 14.6% of students at the Northern Ireland Higher Education Institutions were from outside of Northern Ireland. 5.3% were from GB, with 4.7% from outside the EU and 4.0% were from ROI<sup>55</sup>.

<sup>54</sup> [http://www.southernassembly.ie/uploads/general-files/letterkenny\\_report.pdf](http://www.southernassembly.ie/uploads/general-files/letterkenny_report.pdf)

<sup>55</sup> Enrolments at UK Higher Education Institutions: Northern Ireland analysis 2015/16, Department for the Economy (Northern Ireland), February 2017

**Table 3: Enrolments at Northern Ireland Higher Education Institutions by domicile – 2015/16**

	NI	GB	ROI	Other EU	Non EU	Total
<b>Number</b>	47,150	2,930	2,195	375	2,585	55,245
<b>%</b>	85.4%	5.3%	4.0%	0.7%	4.7%	100.0%

Source: Higher Education Statistics Agency

Notes: The total includes students of unknown domicile.

Percentages may not add to 100% due to rounding.

For the ROI students, the top four subjects accounting for almost 64% of enrolments were subjects allied to medicine, business and administrative studies, biological sciences and education.

#### *Further Education*

In the latest statistics for 2015/16, 6.0% of students undertaking regulated provision at the three Further Education Colleges which neighbour the border, were from outside NI. As noted in Table 4 the majority of these students came from the ROI – many of whom may travel on a daily basis given their proximity to the campus they attend.

**Table 4: Individuals at Further Education Colleges in the border areas<sup>56</sup> of Northern Ireland by Domicile Group 2015/16**

	NI	Other UK	ROI	Other EU	Non EU	Total
<b>Number</b>	31,354	60	1,852	55	34	33,361
<b>%</b>	94.0%	0.2%	5.6%	0.2%	0.1%	100.0%

Source: Consolidated Data Return<sup>57</sup> (regulated only).

Note: The total includes 6 students of unknown domicile.

#### *Post Primary School*

In 2016/17 there were 267 pupils resident in ROI at post primary schools in Northern Ireland as reported in the Department of Education statistics<sup>58</sup>.

#### *Primary School*

In 2016/17 the Department of Education reported that 103 pupils resident in ROI attended primary schools in Northern Ireland<sup>59</sup>.

In 2015/16 191 pupils resident in Northern attend primary and post primary schools in ROI<sup>60</sup>.

#### *Staff Mobility*

Engagement with stakeholders indicates that staff mobility is critical to the ongoing development of universities who are operating in an increasingly competitive marketplace. In particular, it is very important that Northern Ireland remains as an attractive destination for top-class scientists. The free movement of people within the EU has allowed us to attract excellent people to work in our universities, who bring with them associated networks, connections and opportunities for international partnerships. Freedom of

<sup>56</sup> These are the Southern Regional College, the South West Regional College and the North West Regional College.

<sup>57</sup> <https://www.economy-ni.gov.uk/publications/further-education-ad-hoc-tables>

<sup>58</sup> Department of Education (Northern Ireland) analysis of Northern Ireland school census, 2017.

<sup>59</sup> Department of Education (Northern Ireland) analysis of Northern Ireland school census, 2017.

<sup>60</sup> NI school Census; Parents Learners Database Section, Department of Education and Skills (ROI).

movement is particularly important for those staff at the Ulster University Magee campus and FE campuses around the border region who live in the ROI but commute across the border each day. Engagement from stakeholders indicated that 17% of staff at one FE College close to the border commuted from ROI to Northern Ireland.

In addition, in respect of outward mobility of staff, academic staff and researchers often go on secondment or extended placements to universities in other EU member states, which enriches knowledge and experience on both sides. Media reports<sup>61</sup> suggest that top university staff could be poached to work at universities outside the UK, depending on the form of Brexit. Engagement with stakeholders indicated that some universities may try to attract teams or Departments rather than just individuals.

### ROI students studying in Great Britain (GB)

In 2015/16 there were 8,050 Irish Domiciled Students studying at higher education institutions in GB. This was a decrease of 6% between 2014/15 and 2015/16 and a 30% decrease compared to 2010/11. In 2015/16 70% of Irish students in GB were studying in England compared to 23% in Scotland and 7% in Wales.

**Table 5: Irish Domiciled Students studying in GB 2011/12 to 2015/16<sup>62</sup>**

	2011/12	2012/13	2013/14	2014/15	2015/16	% of all IE students in GB 2015/16
<b>in English HEIs</b>	8,015	6,695	6,200	5,875	5,630	70%
<b>in Welsh HEIs</b>	910	740	645	575	535	7%
<b>in Scottish HEIs</b>	2,630	2,340	2,225	2,110	1,885	23%
<b>Total</b>	<b>11,555</b>	<b>9,775</b>	<b>9,070</b>	<b>8,560</b>	<b>8,050</b>	100%

Source: [www.hesa.ac.uk](http://www.hesa.ac.uk)<sup>63</sup>

NB. These figures do not include short-term exchange students such as Erasmus.

<sup>61</sup> <https://www.theguardian.com/education/2017/jan/11/university-leaders-academics-hard-brexit-disaster-germany>

<sup>62</sup> [https://www.hesa.ac.uk/files/sfr-files/student\\_sfr242\\_1516\\_table\\_8.xlsx](https://www.hesa.ac.uk/files/sfr-files/student_sfr242_1516_table_8.xlsx)

<sup>63</sup> <http://hea.ie/assets/uploads/2017/06/Brexit-And-Irish-Higher-Education-And-Research-Challenges-And-Opportunities.pdf>

## NI and GB students studying in ROI

In 2016 there were 1,007 students from Northern Ireland and 1,805 students from GB studying on a full time basis at higher education institutions in ROI. Together they accounted for 1.3% of students in ROI.

**Table 6: Full-time and Part-time Students Studying in Ireland by Domicile in 2016<sup>64</sup>**

Domicile	Number of Students	% of Total
Ireland	193,361	89.3%
Northern Ireland	1,007	0.5%
Great Britain (excluding Northern Ireland)	1,805	0.8%
Other EU	3,304	1.5%
Non-EU	16,337	7.5%
Unknown	789	0.4%
Total FT Enrolments 2016	216,603	100.0%

Source: [www.heai.ie](http://www.heai.ie)

## 2.11 Freight Transport

This section presents the statistics for NI and ROI registered HGV freight transported in 2015. The Northern Ireland data are from the Continuing Survey of Road Goods<sup>65</sup>, while the ROI data is from the CSO Road Freight Transport Survey<sup>66</sup>.

### NI Registered HGVs

In 2015, 62.9 million tonnes of goods were lifted by NI registered HGVs, of which:

- Almost three quarters (72%) (45.1 million tonnes) were lifted in NI and moved within NI.
- 4.4 million tonnes (7%) were lifted in NI and moved to ROI.
- 2.1 million tonnes (3%) were lifted in ROI and moved to NI.
- 2 million tonnes (3%) were lifted in ROI and moved within ROI.
- 1.1 million tonnes (2%) were lifted in NI and moved to GB and other countries.
- Almost one million tonnes (0.9 million) (1%) were lifted in GB and other countries and moved to NI.
- Less than half a million tonnes (0.3 million) (less than 1%) were lifted in GB and other countries and moved to ROI.
- 6.7 million tonnes (11%) were lifted in GB and other countries and moved within GB and other countries.
- Less than half a million tonnes (0.3 million) (0.5%) were lifted in ROI and moved to GB and other countries.

<sup>64</sup> [http://heai.ie/assets/uploads/2017/05/Full-time-Enrolments-by-Domiciliary-2015\\_16.xlsx](http://heai.ie/assets/uploads/2017/05/Full-time-Enrolments-by-Domiciliary-2015_16.xlsx)  
[http://heai.ie/assets/uploads/2017/05/Part-time-Enrolments-by-Domiciliary-2015\\_16.xlsx](http://heai.ie/assets/uploads/2017/05/Part-time-Enrolments-by-Domiciliary-2015_16.xlsx)

<sup>65</sup> Road Freight: CSRG NI, 2014-2016, Department for Transport, 2016

<sup>66</sup> CSO Road Freight Transport Survey, Central Statistics Office, 2017

When looking at cross border activity by NI registered vehicles (NI to ROI or ROI to NI journeys) it can be seen that over the past 5 years (2011-2015) there were 2.6 million laden journeys and 36.9 million tonnes carried cross border.

In 2015 there were 0.4 million laden journeys and 6.4 million tonnes carried cross border. This represented 10% of goods lifted by NI registered HGVs. The full data are provided in Tables 21-23 in Annex 1.

## **ROI Registered HGVs**

In 2015, 118.1 million tonnes of goods were lifted by ROI registered HGVs, of which:

- The vast majority (94%) (111.2 million tonnes) were lifted in ROI and moved within ROI.
- 1.6 million tonnes (1.4%) were lifted in NI and moved to ROI.
- 2.3 million tonnes (1.9%) were lifted in ROI and moved to NI.
- 0.3 million tonnes (0.3%) were lifted in NI and moved within NI.
- 0.03 million tonnes (0.02%) were lifted in NI and moved to GB and other countries.
- 0.06 million tonnes (0.05%) were lifted in GB and other countries and moved to NI.
- 0.7 million tonnes (0.6%) were lifted in GB and other countries and moved to ROI.
- 1.2 million tonnes (1%) were lifted in GB and other countries and moved within GB and other countries.
- 0.7 million tonnes (0.6%) were lifted in ROI and moved to GB and other countries.

When looking at cross border activity by ROI registered vehicles (NI to ROI or ROI to NI journeys), in 2015 there were 3.9 million tonnes carried cross border. This represented 3.3% of goods lifted by ROI registered HGVs.

### **Media Article 1: Freight Transport**

Seamus Leheny from the Northern Ireland Freight Transport Association knows the pain of those whose businesses may be disrupted by Brexit. The Irish revenue commissioner, Niall Cody has said up to 8% of freight crossing the border might be subject to checks after Brexit.

With a minimum of 6,000 lorries trundling over the border every day, you begin to see the scale of the problem. "That makes at least 500 lorries that could be checked every day," says Leheny. "Added to that is the thought that drivers selected for checking might have to drive away from the main flow of traffic to a specific post – time and distance costs money.

Niall Cody said businesses, however, must assume there will be "some form of customs" post-Brexit - it might be that people would be allowed to make declarations online.

Ongoing analysis of cross-border trade increasingly shows that most goods transported between the jurisdictions will not need to be physically checked. Still, there are those who might be less than scrupulous and could take advantage by shipping goods into Belfast and straight into the EU via Dublin – without paying the tariffs.

The large retailers treat the island of Ireland as an entity – one market. They get the goods to Belfast, use distribution centres to sort and store, and send them on by lorry on to Galway, Cork and Dublin. "They may ship directly rather than go through a whole bureaucratic process. Jobs could be lost in Northern Ireland," Leheny says.

## 2.12 Summary

- According to NI traffic count data, there is an average of 118,000 vehicle border crossings each day on the principal border crossing roads. The majority of border crossing points (on more minor roads) are not included in this figure. This equates to a minimum of 43 million annual cross border journeys.
- The NI Transport model estimates the number of border crossings to be 163,000 vehicle crossings (143,000 car and light good vehicles and 19,600 HGV crossings) and 243,000 person crossings each day for the 12 peak period (7am to 7pm).
- This gives an annual estimate of 89 million person crossings for the 12 hour period each year. Extrapolating this figure for a 24 hour period would give an estimated annual total in the region of 110 million person crossings.
- Approximately 1.8 million people used NI public transport to cross the border in 2016/17 (876k train and 900k bus).
- The Northern Ireland Passenger Survey shows that in 2016 there were 8.10m journeys made into and out from Northern Ireland's (NI) airports. There were 2.63 million air passenger journeys from NI airports by GB residents and 300k by ROI residents in 2016.
- There were 12.8 million passenger flows between ROI and GB in 2016.
- There were 6.6 million air passenger journeys from ROI airports by GB residents and 1.02 million by NI residents in 2016.
- There were 2.04 million sea passenger journeys between NI and GB in 2016.
- 2.7 million sea passenger journeys between ROI and GB in 2016.
- The Centre for Cross Border Studies has used a variety of studies to provide an estimate of 23,000 and 29,000 people who commute across the border. Based on the other available information, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable.
- 2,195 ROI resident students were enrolled at Higher Education institutions in Northern Ireland in 2015/16, with 1,852 ROI residents attending Further Education colleges.
- In 2016/17 there were 370 pupils resident in ROI attending primary and post primary schools in Northern Ireland.
- In 2015/16 there were 8,050 Irish Domiciled Students studying at higher education institutions in GB.
- In 2016 there were 1,007 students from Northern Ireland and 1,805 students from GB studying on a full-time or part-time basis at higher education institutions in ROI.
- In 2015 there were 0.4 million laden journeys and 6.4 million tonnes carried cross border. This represented 10% of goods lifted by NI registered HGVs.
- In 2015 there were 3.9 million tonnes carried cross border by ROI HGVs. This represented 3.3% of goods lifted by ROI registered HGVs.

## 3. TOURISM

### 3.1 Overview

Tourism is fundamental to the all-island economy with the industry supporting in the region of 281,000 jobs across the island.<sup>67</sup> Currently Northern Ireland and the Republic of Ireland are marketed as a single geographical tourist destination, with joint membership of the EU and the Common Travel Area underpinning this approach. Therefore, it is clear that the CTA is critically important for business and tourism on the island of Ireland. A hard Brexit and its implications for the CTA has the potential to erode the benefits of the existing all-island approach to tourism marketing. The loss of this approach has the potential to seriously damage both the Tourism Sector's existing success and its future growth.

This section of the paper presents the tourism statistics for Northern Ireland. It provides information on:

- The number of external visitors to Northern Ireland.
- The residency of the visitors to Northern Ireland.
- The purpose for the visit to Northern Ireland.
- The economic impact of the external visitors.
- Visitor Routes into Northern Ireland.
- Northern Ireland Visitor attractions.
- External visitors to ROI from the UK.
- External visitors to the UK from ROI.
- Summary.

### 3.2 The number of external visitors to Northern Ireland

There were 2.58 million of overnight trips by external visitors to NI in 2016. This was the highest number on record and an increase of 12% compared to 2015. The expenditure associated with these visitors increased by 13% to £614 million in 2016<sup>68</sup>.

### 3.3 The residency of the visitors to Northern Ireland

Figure 9 illustrates the percentage breakdown of external visitors to Northern Ireland. Almost 54% of external visitors came from GB compared to close to 18% from ROI. Visitors from outside the UK and Ireland accounted for approximately 29% of overnights visits, which was almost 745,000 overnight visits<sup>69</sup>.

**Figure 9: Share of external visitors by home location (2016) (%)**

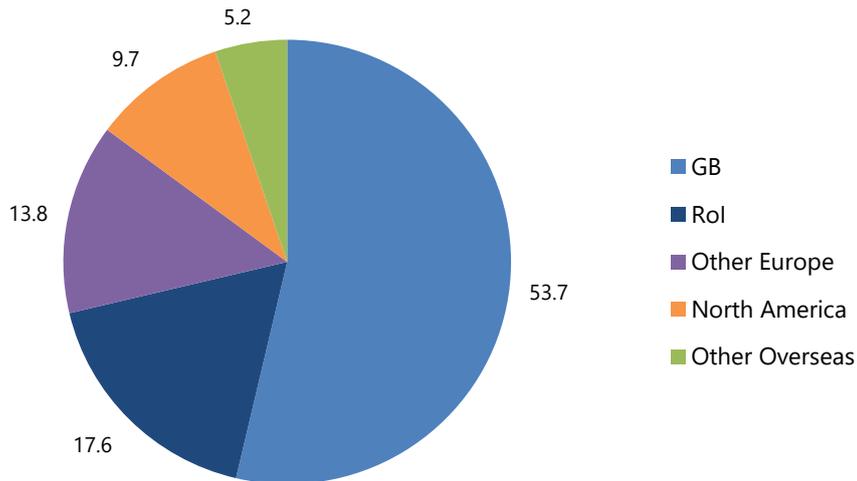
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<sup>67</sup> UK Parliament: EU Committee (2016)

<https://www.publications.parliament.uk/pa/ld201617/ldselect/ldecom/76/7602.htm>

<sup>68</sup> NISRA 25 May 2017 Northern Ireland Annual Tourism Statistics 2016.

<sup>69</sup> <https://www.nisra.gov.uk/publications/external-overnight-trips-northern-ireland-publications>

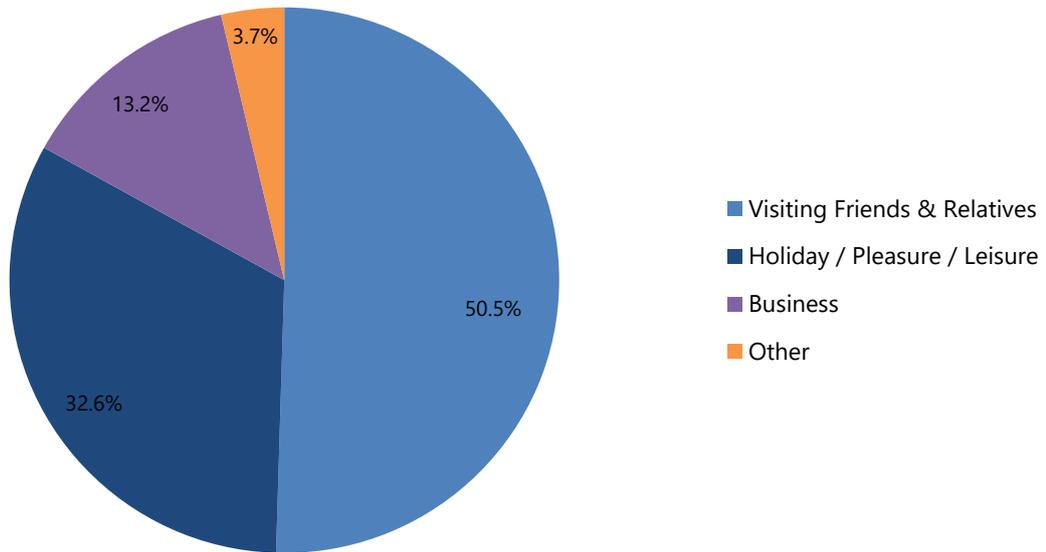


Source: NISRA Northern Ireland Annual Tourism Statistics 2016

### 3.4 The purpose for the visit to Northern Ireland

Figure 10 provides the purpose of visit for external visitors to Northern Ireland. Just over half (50.5%) of all external visitors to Northern Ireland do so to visit friends and relatives. Almost a third (32.6%) of external visitors do so for holiday/ pleasure and leisure purposes with 13% of visits for business purposes and almost 4% of visits for other reasons<sup>70</sup>.

**Figure 10: Purpose of visit of external visitors in 2016**



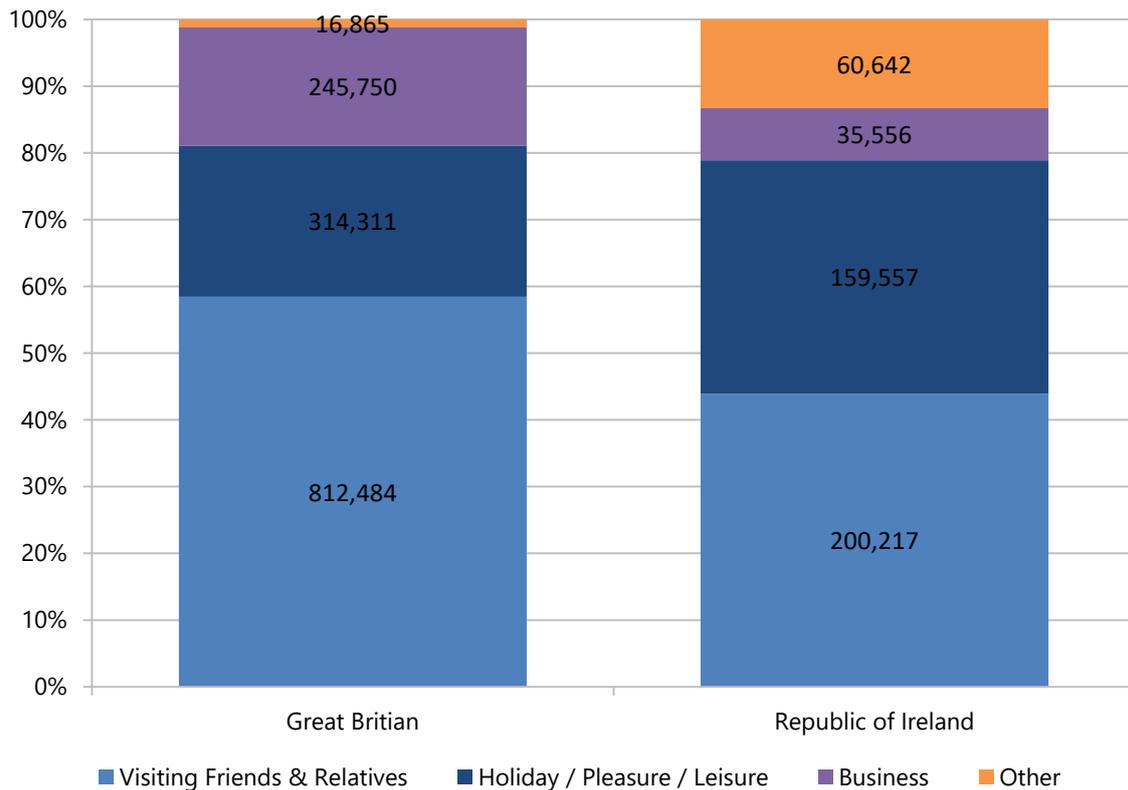
Source: NISRA Northern Ireland Annual Tourism Statistics 2016

<sup>70</sup> <https://www.nisra.gov.uk/publications/external-overnight-trips-northern-ireland-publications>

Visitors from ROI and GB have differing reasons for travelling to Northern Ireland. 44% of visitors from ROI were visiting friends and relatives, 35% were visiting for holiday/ pleasure and leisure purposes, 8% were on business whilst 13% visited for other purposes.

58% Visitors from GB did so to visit friends and relatives, whilst 23% of visits were for holiday/pleasure and leisure purposes, 18% were for business purposes and 1% visits for other purposes<sup>71</sup>.

**Figure 11: GB and ROI visitors by purpose**



Source: NISRA Northern Ireland Annual Tourism Statistics 2016

### 3.5 The Economic Impact of External Visitors

Table 7 reports the visitor expenditure by country of residency. It also presents the estimated GVA and employee jobs apportioned by the expenditure of the visitors from different countries.

<sup>71</sup> <https://www.nisra.gov.uk/publications/external-overnight-trips-northern-ireland-publications>

**Table 7: Expenditure / GVA / Employee Jobs by Country of Residency**

	Expenditure (£)	GVA (£)	Employee Jobs <sup>72</sup>
<b>Great Britain</b>	315,701,061	153,360,981	22,749
<b>ROI</b>	70,261,667	34,131,650	5,063
<b>Other Europe</b>	93,458,348	45,400,113	6,734
<b>North America</b>	83,977,275	40,794,406	6,051
<b>Other Overseas</b>	50,154,603	24,364,058	3,614
<b>Domestic</b>	237,154,714	115,204,806	17,089
<b>Total</b>	<b>850,707,668</b>	<b>413,256,015</b>	<b>61,300</b>

Source: NISRA Northern Ireland Annual Tourism Statistics 2016, Annual Business Inquiry 2015, DfE Analysis

Table 8 shows the average expenditure per overnight trip and per night by country of residency. Visitors from GB made almost 1.4 million trips to NI in 2016 and stayed for an average of 4.1 nights. This compares to the 2.2 nights per overnight trip from ROI visitors<sup>73</sup>.

**Table 8: Total trips and Expenditure by Country of Residency in 2016**

	Total Overnight Trips	Total Nights	Average nights per trips	Total Spend (£)	Average spend per trip (£)	Average spend per night (£)
<b>Great Britain</b>	1,389,411	5,630,302	4.1	315,701,061	227	56
<b>Republic of Ireland</b>	455,972	1,006,785	2.2	70,261,667	154	70
<b>Other Europe</b>	358,383	2,344,644	6.5	93,458,348	261	40
<b>North America</b>	249,962	1,471,484	5.9	83,977,275	336	57
<b>Other Overseas</b>	134,821	912,407	6.8	50,154,603	372	55
<b>Total</b>	<b>2,588,548</b>	<b>11,365,623</b>	<b>4.4</b>	<b>613,552,954</b>	<b>237</b>	<b>54</b>

Source: NISRA Northern Ireland Annual Tourism Statistics 2016, DfE Analysis

### 3.6 Visitor Routes into Northern Ireland

91% of GB visitors to Northern Ireland arrived through Northern Ireland sea and airports. The remaining nine per cent of GB visitors to Northern Ireland arrived via ROI. 64% of the non UK and Ireland visitors to NI arrived via ROI, compared to 36% of external visitors who arrived directly through Northern Ireland sea and airports. Table 9 provides the arrival route for GB and Overseas Visitors to NI<sup>74</sup>.

<sup>72</sup> The latest employee jobs figure for Tourism reported by NISRA relates to 2015. Approximately 26,200 jobs are full-time with approximately 35,000 part-time jobs. Figures are rounded to the nearest hundred.

<sup>73</sup> <https://www.nisra.gov.uk/publications/external-overnight-trips-northern-ireland-publications>

<sup>74</sup> [https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/2016-Annual-Publication\\_0.pdf](https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/2016-Annual-Publication_0.pdf)

**Table 9: Visitor Routes into Northern Ireland in 2016**

Arrival Route	Visitors from GB	Visitors from outside UK and ROI
<b>NI Sea and Air Ports</b>	1,274,000	252,000
<b>ROI Sea and Air Ports</b>	126,000	448,000
<b>Total</b>	1,400,000	700,000

Source: NISRA Northern Ireland Annual Tourism Statistics 2016, DfE Analysis

### 3.7 Northern Ireland Visitor Attractions

In 2016 there were an estimated 15 million visits to visitor attractions in Northern Ireland. Between 2015 and 2016 visits to the headline attractions (Giant's Causeway and Titanic Belfast) increased by 9%. Country Parks / Parks and Forests attracted the highest proportion (33%) of visitors in 2016, followed by Visitor/Heritage centres. The reported figures suggest an estimated increase of 5% in the number of visits to attractions in 2016.

Around 60% of visits were made by residents of Northern Ireland. Approximately 10% of visits were made by visitors from the Republic of Ireland, 10% were from Great Britain and 21% by visitors from outside the UK and Ireland<sup>75</sup>.

### 3.8 External visitors to ROI from GB

In 2016 there were 3.7 million visits to Ireland from Great Britain made by Great Britain residents<sup>76</sup>. 40% of these visits were for the purpose of seeing friends and family, 36% were for a holiday, 19% were for business and 6% for some other purpose.

### 3.9 External visitors to the UK from ROI

In 2016 there were 2.63 million visits to Great Britain from Ireland by residents of Ireland<sup>26</sup>. Table 10 shows the number of cross channel trips to GB by Irish resident by purpose. In 2016 44% of these visits were for the purpose of seeing friends and family, 25% were for a holiday, 19% were for business and 12% for some other purpose.<sup>27</sup>

<sup>75</sup> <https://www.nisra.gov.uk/publications/visitor-attraction-survey-publications>

<sup>76</sup> ONS ad-hoc data release on visits to Great Britain by residents of Ireland and visits to Ireland by residents of Great Britain, by purpose, 2002-2016', 14 August 2017.

**Table 10: Total Number of Cross Channel Trips Made By Irish Residents 2013 – 2016 ('000s)**

Reason	2013	2014	2015	2016
Business	375,507	457,012	521,424	503,616
Visiting Friends and Relations	563,162	563,376	533,179	661,961
Holiday, Leisure and recreation	940,477	968,882	1,004,615	1,165,988
Other	270,839	253,353	314,116	307,235
<b>Total Trips</b>	<b>2,149,985</b>	<b>2,242,622</b>	<b>2,373,333</b>	<b>2,638,800</b>

Source: ONS ad-hoc data release<sup>77</sup>

### 3.10 Summary

- 1.4 million overnight trips from GB visitors to NI in 2016.
- 456k overnight trips from ROI visitors to NI in 2016.
- 91% of GB visitors to NI arrived through NI sea and airports.
- 64% of the non UK and Ireland visitors to NI arrived via ROI. (448k of 700k total).
- Expenditure by GB and ROI visitors to NI was £386 million, which was 63% of all external visitor expenditure.
- In 2016 there were 3.7 million visits to Ireland from Great Britain made by Great Britain residents.
- There were 2.63 million visits to Great Britain from Ireland by residents of Ireland.

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<sup>77</sup> ONS ad-hoc data release on visits to Great Britain by residents of Ireland and visits to Ireland by residents of Great Britain, by purpose, 2002-2016', 14 August 2017.

# 4. CROSS BORDER SHOPPING

## 4.1 Overview of cross border shopping

Cross border shopping has been a long standing feature of the retail trade on both sides of the Northern Ireland – ROI border. Historically there are a range of reasons for such shopping including the availability and variety of shops, favourable exchange rates and general convenience given that, for some people, the shops closest to them are on the other side of the border.

This section of the paper provides information on:

- Cross border shopping patterns.
- Cross Border Shopping Expenditure.
- Engagement with stakeholders.
- Summary.

## 4.2 Cross border shopping patterns

Intertradelreland has been conducting a longitudinal study of cross border shopping patterns in Northern Ireland over the past 10 years. They measure car park occupancy at a number of car parks at cross border shopping locations including food retail outlet and general retail shopping centres. The percentage of ROI registered cars is collected on the same shopping day of each month at each location. The data provide an indicator of the shopping movement trends over time. Around 47% of cars in Northern Ireland shopping locations near the border are Ireland registered<sup>78</sup>.

Movements in the exchange rate influence the direction of shopper flows. The months after the UK EU Referendum vote resulted in an increase of shoppers from ROI to Northern Ireland due to the weakening of Sterling relative to the Euro. Engagement with stakeholders suggest that the retail trade views these flows as a zero sum game, with periods of time when shoppers move in one direction followed by reversals in those flows when exchange rates move in the opposite direction. In addition there are seasonal peaks and troughs in movements, with December usually a peak month for cross border shoppers.

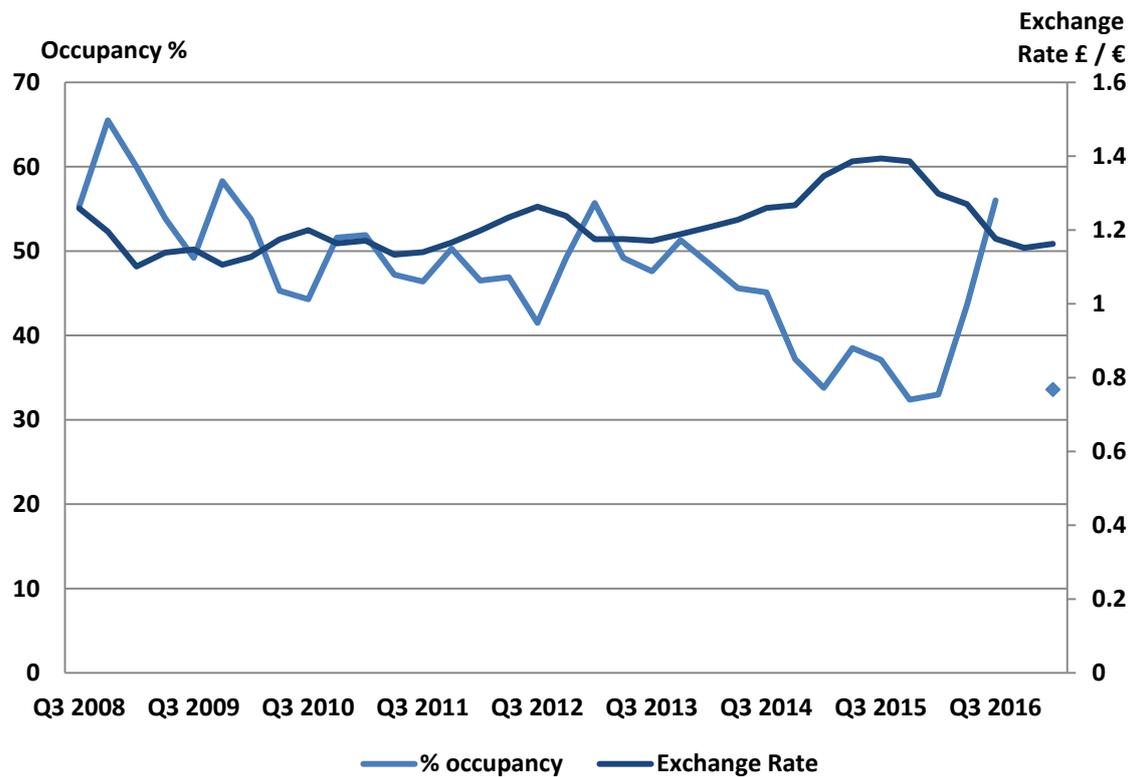
It was noted that the level of car park occupancy will vary depending on the goods sold. The data indicates that there is a higher percentage of shoppers coming to do grocery shopping in Northern Ireland, compared to shopping in general retail outlets.

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<sup>78</sup> Cross-border Shopping, InterTradelreland, 2016. <http://www.intertradeireland.com/researchandpublications/trade-statistics/cross-border-shopping/>

Note: Average figure quoted is calculated between Q3 2008 and Q1 2017.

**Figure 12: Occupancy of Irish Registered Cars in NI Border Area Car Parks (%) and £ / € Exchange Rate**



Source: Intertrade Ireland Survey of Border Shopping Centre Car Parks

**Case Study 4: Cross Border Shopping**

Major shopping centre in the North West of Northern Ireland

One large general retail shopping centre in the North West of Northern Ireland uses number plate recognition software to measure the number of Irish registered cars using the car parks at the shopping centre. It reported that on average there were 3,400 ROI registered cars in this car park each week in 2016, which accounted for 16% of total cars in the car park.

In the second half of 2016 there was a 23% increase in the average number of ROI cars in the car park per week. This increase has been sustained into 2017, with ROI car numbers 25% higher than the same period in 2016.

Newry Area Retail Shopping Centre

Over a period of 6 months (Q1 2017-Q2 2017) an established retail shopping centre in the Newry area had a similar share of ROI cars recorded in their car park with a weekly average of 14% of total cars parked registered in ROI. Both examples indicate the significant volume of car movements from ROI to shopping centres in Northern Ireland.

Sources: Independent Retail Shopping Centre, Intertradelreland

### 4.3 Cross Border Shopping Expenditure

In 2009 and 2010 the Quarterly National Household Survey<sup>79</sup> conducted by CSO in Ireland included a series of questions on cross border shopping by households in ROI. This survey estimated that in the year to Q2 2010 total household expenditure on shopping in Northern Ireland was €418 million a decrease of 4% from €435 million in the previous year. This was the equivalent £72.2 million in GVA terms and contributed to approximately two per cent of employment in the wholesale and retail sector. This was almost 2,300 jobs.

The survey found that 14% of households had made shopping trips to Northern in the previous 12 months. For people living in the border region, this figure was 41%. The average number of trips per year made by households who shopped in NI was 8.6, but households in the border counties made on average 20.2 trips, almost 2 trips per month.

The average expenditure on the most recent shopping trip was estimated to be €274 for all the households surveyed, compared to €155 for households in the border region. Over the year it is estimated that households living in the border region spent almost €3,150 in Northern Ireland, which was 33% higher than the average expenditure by all ROI households.

#### Goods purchased

Table 11 shows the different types of goods purchased by ROI households in their most recent shopping trip to Northern Ireland. For most categories there was no difference in the rates of purchase for the type of goods purchased by ROI consumers and those in the border regions. However, there was a difference in the amount of money spent. Groceries made up the largest expenditure item for people living in the border regions. Expenditure on clothing and durables was higher for the full population, which is consistent with them making fewer trips to shop in NI and thus making larger purchases due to the distance they have to travel compared to consumers in the border who make more regular shopping trips<sup>80</sup>.

**Table 11: Goods Purchased by households who shopped in NI in Q2 2010**

	Average Expenditure	Alcohol	Cosmetics	Groceries	Clothing & Durables	Other
<b>Percentage of households purchasing goods (%)</b>						
All households	n/a	44	25	77	40	19
Border region	n/a	29	25	78	31	15
<b>Expenditure (€)</b>						
All Households	274	33	10	105	77	49
Border regions	155	11	6	79	25	35
<b>Share of expenditure (%)</b>						
All Households	n/a	12%	4%	38%	28%	18%
Border regions	n/a	7%	4%	51%	16%	22%

Source: CSO Quarterly National Household Survey Q2 2010

<sup>79</sup> [http://www.cso.ie/en/media/csoie/releasespublications/documents/labourmarket/2010/qnhs\\_xborder0210.pdf](http://www.cso.ie/en/media/csoie/releasespublications/documents/labourmarket/2010/qnhs_xborder0210.pdf)

<sup>80</sup> <http://www.cso.ie/en/releasesandpublications/er/qnhs/quarterlynationalhouseholdsurveyquarter22015/>

## 4.4 Engagement with stakeholders

Engagement with stakeholders reported that many people in the border areas will go to their nearest shops for convenience purchases. Many retailers on both sides of the border will accept payment in either Euros or Sterling as a way to attract customers. There is a long tradition of people in Northern Ireland purchasing petrol on the other side of the border.

### Media Article 2: Border Petrol Station

The BBC<sup>81</sup> reports that people who own petrol stations along the border know all about boom and bust - trade depends on currency fluctuations and significantly lower fuel duty rates in the Republic of Ireland.

Enda McColgan, manager of the Texaco in Muff, says 90% of the garage's customers come from Northern Ireland to top up. Business is booming. There was one stage when demand was so great they even had to employ somebody to manage the traffic on the road outside. He was concerned about the consequences of leaving the EU. He said "If we had a hard border then we'd be going back 30 years in six weeks to six months."

Due to the arbitrage advantages that changing exchange rates offer to consumers (and to cross border commuters) there is a number of businesses that operate Bureau de Change Outlets in towns like Newry, Derry~Londonderry, Letterkenny and Dundalk. Retailers need to be aware of the impact of changing exchange rates and the threats to their businesses caused by volatility in exchange rates.

The trade flow due to cross border shoppers is a zero sum game for the Border Corridor and towns within it as a whole and it needs to be treated as such by Councils in the region. Past experience shows that 60% of cross border shoppers come from within a 30 mile distance of the border.

## 4.5 Summary

- InterTradeIreland figures record that ROI registered cars account for, on average, 47% occupancy of car parks for selected cross border NI shopping centres between Q3 2008 and Q1 2017.
- 2 cross border shopping centres report a combined average 4,100 of Irish registered cars in their car parks each week.
- In the 12 months to Q2 2010, the Irish CSO estimated that total household expenditure on shopping in NI was €418 million. This was £72.2 million in GVA terms, which was approx. 2% of GVA for the wholesale/retail sector.

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<sup>81</sup> [http://www.bbc.co.uk/news/resources/idt-sh/The\\_hardest\\_border](http://www.bbc.co.uk/news/resources/idt-sh/The_hardest_border)

# 5. CROSS BORDER COMMUNITIES AND CO-OPERATION

## 5.1 Overview

The common travel area has played an important role on how people, communities, district councils and others live and work together successfully in border areas of Northern Ireland and ROI.

This section of the paper examines the following area.

- Cross border communities.
- Cooperation between District Councils.
- Cooperation on EU funded programmes.
- Cross Border Health and Social Care Services.

## 5.2 Cross border communities

There is a long history of people on either side of the border living connected lives due to family ties and relationships. In recent years these ties have increased with families moving from one side of the border, particularly from Northern Ireland to ROI for economic and social reasons.

This sub section of the paper provides information on:

- Residents of Northern Ireland born in the Republic of Ireland.
- Residents of the Republic of Ireland born in the Northern Ireland.
- Analysis and case studies conducted in the North West of Northern Ireland.

### **Residents of Northern Ireland born in the Republic of Ireland**

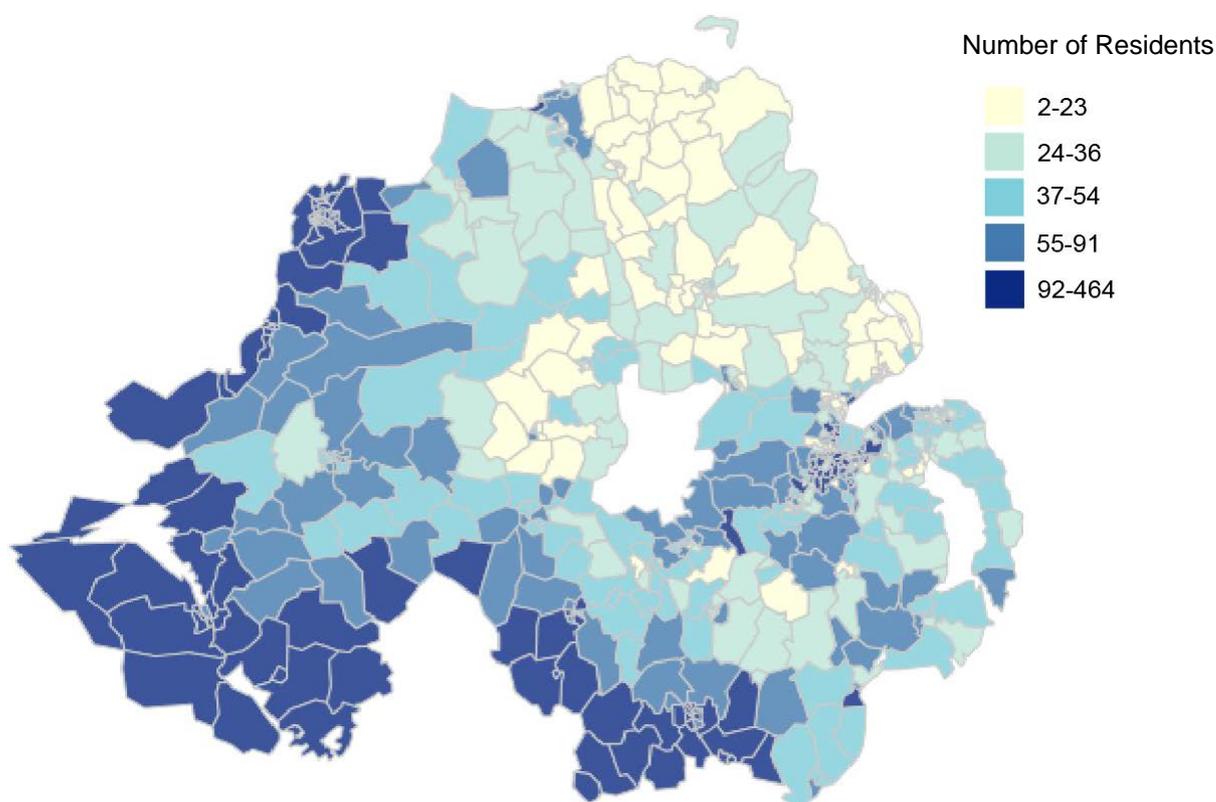
The Northern Ireland Census 2011<sup>82</sup> (NISRA) captured information of those resident in Northern Ireland at that point in time. One aspect captured was the country the person was born in, which can be broken down to different levels including those born in the Republic of Ireland. Census results show:

- In 2011, there were 38,000 residents in Northern Ireland who were born in the Republic of Ireland (2% of the total NI population of 1.8 million) (Table 12).
- Of the 38,000 residents the largest numbers lived in Derry City and Strabane district council (18%); Belfast district council (16%); Newry, Mourne and Down and Fermanagh and Omagh district councils (both 14%).
- The five district councils that fall along the border have 61% (23,000) of residents born in ROI.
- Figure 13 shows that the closer the proximity to the NI-ROI border the higher the concentration of ROI born residents in Northern Ireland.

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<sup>82</sup> (<http://www.ninis2.nisra.gov.uk/public/AdvancedSearch.aspx?sk>)

**Figure 13: Number of residents living in Northern Ireland who were born in the Republic of Ireland by ward, 2011**



Source: Northern Ireland Census 2011, NISRA

**Table 12: Number of residents living in Northern Ireland who were born in the Republic of Ireland by Local Government District, 2011**

Local Government District	Population	Residents of NI born in ROI
Antrim and Newtownabbey	138,567	1,479
Ards and North Down	156,672	1,971
<i>Armagh City, Banbridge and Craigavon (Border LGD)</i>	<i>199,693</i>	<i>3,507</i>
Belfast	333,871	6,130
Causeway Coast and Glens	140,877	2,056
<i>Derry City and Strabane (Border LGD)</i>	<i>147,720</i>	<i>6,626</i>
<i>Fermanagh and Omagh (Border LGD)</i>	<i>113,161</i>	<i>5,311</i>
Lisburn and Castlereagh	134,841	1,944
Mid and East Antrim	135,338	1,090
<i>Mid Ulster (Border LGD)</i>	<i>138,590</i>	<i>2,250</i>
<i>Newry, Mourne &amp; Down (Border LGD)</i>	<i>171,533</i>	<i>5,469</i>
<b>Border LGDs</b>	<b>770,697</b>	<b>23,163</b>
<b>Northern Ireland</b>	<b>1,810,863</b>	<b>37,833</b>

Source: Northern Ireland Census 2011, NISRA

## **Residents of the Republic of Ireland born in the Northern Ireland**

Similarly, Central Statistics Office's Census 2016<sup>83</sup> captured information of those people resident in the Republic of Ireland who were born in Northern Ireland. The Census 2016 results show:

- In 2016, there were 57,000 residents in the Republic of Ireland who were born in the Northern Ireland (1% of the total population) (Table 13)
- Of the 57,000 residents, 27,000 (49%) lived in counties that shared a border with Northern Ireland.
- Of this 27,000 residents the largest numbers lived in County Donegal (47% or 13,000 residents) and County Louth (26% or 7,000).

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<sup>83</sup> <http://www.cso.ie/en/census/census2016reports/>

**Table 13: Number of residents living in the Republic of Ireland who were born in Northern Ireland by County, 2016**

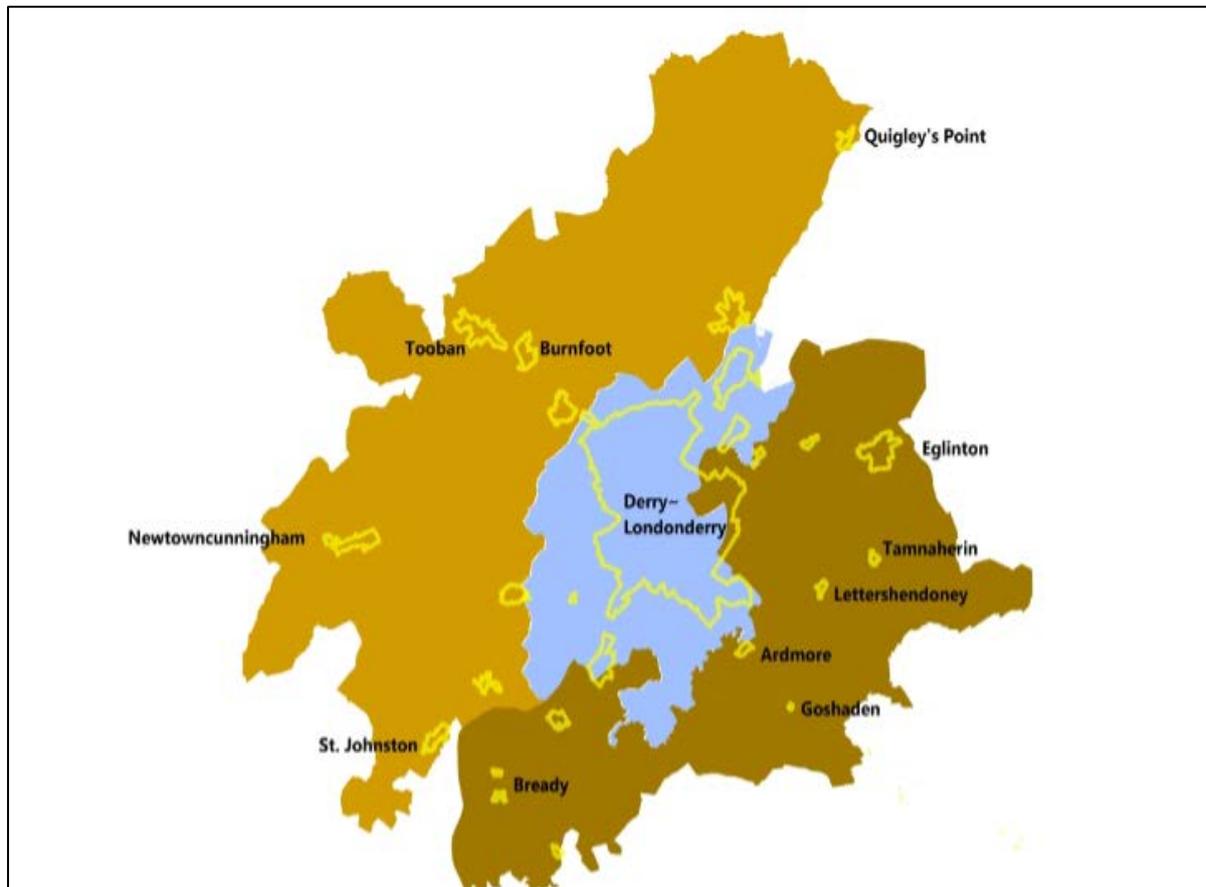
<b>Area</b>	<b>Population</b>	<b>Residents of ROI born in NI</b>
<b>Cork City</b>	123,019	501
<b>Clare</b>	116,460	908
<b>Cork County</b>	412,826	1,678
<b><i>Cavan (Border County)</i></b>	75,320	1,896
<b>Carlow</b>	56,476	205
<b>Dublin City</b>	537,190	5,551
<b><i>Donegal (Border County)</i></b>	156,169	12,639
<b>Dún Laoghaire-Rathdown</b>	213,519	3,054
<b>Fingal</b>	292,327	2,820
<b>Galway City</b>	75,691	728
<b>Galway County</b>	177,215	1,225
<b>Kildare</b>	220,516	1,636
<b>Kilkenny</b>	98,125	454
<b>Kerry</b>	143,520	674
<b>Longford</b>	40,655	258
<b><i>Louth (Border County)</i></b>	127,762	7,001
<b>Limerick City and County</b>	192,677	687
<b><i>Leitrim (Border County)</i></b>	31,715	732
<b>Laois</b>	84,162	340
<b>Meath</b>	193,419	1,903
<b><i>Monaghan (Border County)</i></b>	60,728	4,534
<b>Mayo</b>	128,394	1,011
<b>Offaly</b>	77,571	300
<b>Roscommon</b>	64,000	442
<b>South Dublin</b>	276,066	1,790
<b>Sligo</b>	64,484	896
<b>Tipperary</b>	158,305	567
<b>Waterford City and County</b>	114,641	512
<b>Westmeath</b>	87,891	559
<b>Wicklow</b>	140,586	1,271
<b>Wexford</b>	148,492	617
<b><i>Border Counties</i></b>	<b>451,694</b>	<b>26,802</b>
<b>Total Population</b>	<b>4,689,921</b>	<b>57,389</b>

Source: Central Statistics Office Census 2016

## Analysis and case studies conducted in the North West of Northern Ireland

Derry City and Strabane District Council has conducted an analysis of the country of birth of the population in Donegal living next to the Derry~Londonderry / Donegal border. The Donegal area examined is the lighter shade of yellow in Figure 14. It stretches from St. Johnston, along the border, up to Quigley's Point. The associated settlements are outlined in yellow.

**Figure 14: Derry~Londonderry and Donegal settlements**



Source: Analysis of ROI / NI Census of Population 2011

The total population of this area in Donegal was estimated to be 12,827 in the 2011 ROI Census. Out of this population, 4,955 people reported that they were born in the UK. On the assumption that the vast majority of those born in the UK were actually born in NI, and most likely Derry~Londonderry, it is estimated that up to 39% of the population living in Donegal area in Figure 14 were born in the UK.

The share of the population that were born in the UK is higher in the larger settlements in the area, with an average of 47%. Table 14 shows the population of the nine settlements in this area of Donegal, in 2011.

**Table 14: Population of surrounding ROI Settlements - 2011**

Settlement	Total Population	Born in UK	
		Number	% of Total Pop'
<b>Muff</b>	1,271	811	63.8%
<b>Kildrum (Killea)</b>	581	380	65.4%
<b>Newtowncunningham</b>	1,067	353	33.1%
<b>Bridge End</b>	497	255	51.3%
<b>Burnfoot</b>	466	209	44.8%
<b>Carrigans</b>	336	166	49.4%
<b>Tievebane (Tooban)</b>	351	124	35.3%
<b>St. Johnston</b>	583	117	20.1%
<b>Quigley's Point</b>	227	109	48.0%
<b>Total</b>	<b>5,379</b>	<b>2,524</b>	<b>46.9%</b>

Source: Census of Population, ROI, 2011

Engagement with stakeholders indicate that there is a high level of people who have moved across the border from Northern Ireland to ROI, but they continue to work and centre their lives on their families on the other side of the border. The following paragraphs provide three reported examples of how people live in the border area.

### **Media Article 3: Cross border living 1**

The Belfast Telegraph Report<sup>84</sup> the case of Ruairi and Alicia O'Kane from Derry~Londonderry who bought their home in Muff in Donegal seven years ago. When it came to deciding where to live as a newly married couple, the border didn't even exist for them. They moved to Muff which is just five minutes away from Mr O'Kane's family who live in Derry~Londonderry .

He said: "We could have bought a house in the north but we decided on this house because Muff is essentially a suburb of Derry". Ruairi said, "If people say to me where in Donegal do you live, I say 'the Derry part' and if people say where in Derry do you live, I say 'the Donegal part', that's how linked the two places are".

<sup>84</sup> <http://www.belfasttelegraph.co.uk/news/brexit/fears-of-ireland-hard-border-nightmare-residents-whose-lives-straddle-line-on-a-map-35718928.html>

#### **Media Article 4: Cross border living 2**

The Irish Times reports on the village of Muff on the Derry~Londonderry Donegal border. Muff and the other villages which ring the Border to the west of Derry city have a sense of duality that is simply a feature of cross-Border life.

Most people carry two purses, or have two currencies in their pockets. Some carry two mobile phones. The news comes from the BBC and UTV as well as from RTÉ. Garages, shops, pubs take sterling as well as euro.

Many people send their children to school in the Northern Ireland, and are treated by the NHS – some officially, others unofficially – through what's become known as "grannyng", or the use of relatives' addresses in Derry~Londonderry<sup>85</sup>.

Catherine Woodrow is typical of many Derry people who moved across the Border in the early to mid-2000s because of spiralling property prices in the city and the construction of new, more affordable housing developments just across the Border. She said, "There was no real opportunity in Derry at the time for us to buy a house, but five minutes down the road in Muff we could get a house that was cheaper and much better than anything we could have afforded in Derry. "Most of our neighbours moved here from Derry, and most of them still work in Derry. After 15 years in Muff, Ms Woodrow says Brexit has created fresh uncertainty.

#### **Media Article 5: Cross border commuting**

The Irish Times reports the case of Marie Lindsay. She was born and lives in Muff in Donegal, but each morning drives into Derry~Londonderry, where she's principal of a girls' school, St Mary's College. Her journey to work is seamless these days – down what was once an "unapproved" road, which was spiked during the "Troubles", so that people could not drive across it.

She has lived her life along this border and like thousands of others, she feels she has a double identity. She says "I'm Donegal, born and bred. Donegal is in my DNA, but Derry is my home city, I feel I belong there."

Lindsay has known a hard border and the waits at checkpoints. They were dark days that no-one really wants to recall. She has now grown used to peace and the ease of life. Talk to any of the pupils at her school and you'll soon find they have roots in Donegal – a granny in Malin, an aunty from Carndonagh.

Down the years, people from Derry~Londonderry have taken a Sunday drive from Northern Ireland to visit the beaches, to nurse a pint in Buncrana, or to treat the children to a ride on the swing boats by the shore. Many people in Donegal send their children to school north of the border or are treated by the National Health Service - some officially, some unofficially.

In recent years, Lindsay's Donegal village has played host to young families from Northern Ireland, lured by affordable housing. It has been a breath of fresh air – new life for the local primary school, tills ringing in the shops, a bustling community in the border village. But Brexit is making border folk start to think twice.

<sup>85</sup> <http://www.irishtimes.com/news/world/brexit/brexit-has-put-the-border-back-into-people-s-psyches-1.3074533>

### 5.3 Co-operation between District Councils

Economic development does not always follow boundaries, whether interregional or international. This is evidenced by the functional relationships between settlements on both sides of the border and by the movement of people between places. Cross border co-operation between Ireland and Northern Ireland covers a range of important issues across a variety of sectors and governance structures. These include environmental management, energy, co-operation in education health and transport, enterprise development, joint investment decisions on infrastructure provisions and accident and emergency planning<sup>86</sup>. The following paragraphs outline the co-operation between councils in North West and South of Northern Ireland with their counterparts in ROI.

#### **North West Region Cross Border Group**

The North West Region Cross Border Group (NWRGCB) has been in existence since 1975, when Elected Members from both sides of the Border came together to work in collaboration for the good of the region. The Group now comprises the two administrative areas of Derry City and Strabane District Council and Donegal County Council.

The focus of the NW Region Cross Border Group's investment programme is to develop and promote cross-border collaboration and co-operation and the exchange of expertise, information and best practice among and between e.g. public bodies and other relevant stakeholders.

The Group is committed to strengthening and developing the Region's economy and recognises that a key to achieving such a vision is through adopting a joint and collaborative approach to common issues and opportunities across a wide range of policy areas.

There is an existing level of co-operation on the provision of many services such as emergency services. For example, road traffic accidents or fires in the border area can be responded to by the emergency service providers on either side of the border and on some cases from both<sup>87</sup>. Victims of road traffic accidents can be sent to either Altnagelvin hospital in Northern Ireland or Letterkenny hospital in ROI, depending on the location of the accident and/or the treatment required<sup>88</sup>.

#### **Newry, Mourne and Down District Council and Louth Local Authorities**

A Strategic Alliance and Memorandum of Understanding (MoU) between Newry, Mourne and Down District Council and the Louth Local Authorities was established in 2011 to support and promote the economic development and competitiveness of the region. Both councils support monthly meetings to develop and implement strategic plans for the region, for example, in areas of planning, the environment and tourism.

### 5.4 Cross Border Health and Social Care Services

The following sections provide examples of cooperation in the development and provision of health and social care services NI and ROI. The examples include:

- North West Cancer Centre.

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<sup>86</sup> Ireland 2040 Our Plan - Issues and Choices, February 2017 Ireland 2040: The National Planning Framework in an All-Island Context

<sup>87</sup> <http://www.bbc.co.uk/news/uk-northern-ireland-foyle-west-40198587>

<sup>88</sup> <https://www.donegalnow.com/news/donegal-roads-claim-two-lives-fatal-crash/159460>

- All Island Congenital Heart Disease Network.
- Cross Border primary PCI (Percutaneous Coronary Intervention) cardiology service.
- Daisy Hill Hospital Newry.
- The delivery of cross border health and social care services in the North and West of NI and ROI.
- Cross border maternity services.

### North West Cancer Centre

The provision of a service for a combined cross border population of 527,000 people was central to the business case for the establishment of a radiotherapy facility at Altnagelvin Hospital in Derry~Londonderry. The new unit was required to increase radiotherapy capacity in Northern Ireland which was anticipated to exceed demand by 2015. It would also improve patient travelling times by providing more locally accessible services.

Patients from Derry~Londonderry, Limavady, Strabane, Omagh and Enniskillen District Council areas, and patients from Coleraine, Moyle and Ballymoney areas, will access radiotherapy services at the Altnagelvin unit. In population terms, this will be approximately 417,000 people by the year 2016. In ROI, patients from north to mid-Donegal, i.e. the catchment population of Letterkenny General Hospital, will also receive radiotherapy treatment at Altnagelvin. This is a population of approximately 110,000 people. The Radiotherapy Unit opened for operation in November 2016.

#### Media Article 6: Cross border health services<sup>89</sup>

Betty Holmes is a member of Donegal Action for Cancer Care group, which is based in the Republic of Ireland but campaigns to access nearby health facilities in Northern Ireland. She is passionate about getting the best cancer care close at hand. When a new state-of-the-art radiotherapy centre opened recently in Altnagelvin Hospital, Derry~Londonderry, there was a sigh of relief from families on both sides of the border.

No more two-hour treks over the mountain pass from Derry~Londonderry to Belfast for those living with cancer in Northern Ireland's western region and no more five-hour treks from Donegal to Galway for cancer patients living in the Republic of Ireland. She said "It is a good 308km to Galway and what sort of a journey is that when there is radiotherapy sitting a few miles across the border? The journey to Altnagelvin Hospital is as little as 45 minutes from the top end of Donegal at Malin Head."

Agreements in place between the UK and Irish governments mean there are currently places for 385 cancer patients coming across the border. Brexit weighs heavily on Betty Holmes's mind. She commented "Our concern is what happens in three to five years when the real effect of Brexit is starting to be felt.

## 5.5 All Island Congenital Heart Disease Network

On 3 March 2015, the then Ministers for Health in Northern Ireland and the Republic of Ireland, published the framework for the All-island Congenital Heart Disease (CHD) Network based on

<sup>89</sup> [http://www.bbc.co.uk/news/resources/idt-sh/The\\_hardest\\_border](http://www.bbc.co.uk/news/resources/idt-sh/The_hardest_border)

proposals by an expert International Working Group (IWG).<sup>90</sup> This resulted in the establishment of the first all-island clinical network to treat CHD. The Network is based on a model of a single surgical centre at Our Lady's Children's Hospital Crumlin (OLCHC, Dublin), supported by a specialist Children's Heart Centre in Belfast and additional paediatric cardiology expertise in district general hospitals across the island of Ireland.

The CHD Network is to benefit from £42m worth of investment announced at the opening of a new hybrid cardiac catheterisation laboratory at OLCHC in July 2016, where all surgical and interventional care will be provided when the Network is fully developed.

Children's heart surgery services at Belfast's Royal Victoria Hospital (RVH) ceased in 2015 due to the low numbers of patients making it difficult to continue to meet international standards. Emergency and urgent surgical cases from Northern Ireland are currently provided at OLCHC by ROI-based surgeons, with remaining elective cases (currently referred to specialist centres in England) to follow when sufficient capacity has been developed. All Northern Ireland interventional cases (cardiac catheterisations) are also carried out at OLCHC by interventional cardiologists based across both jurisdictions.

The £42m investment includes revenue and capital contributions from Northern Ireland and the Republic of Ireland health departments, £1m of which will enhance existing facilities in Belfast.

### **Cross Border primary PCI (Percutaneous Coronary Intervention) cardiology Service**

Northern Ireland's 24/7 primary Percutaneous Coronary Intervention (pPCI) service is delivered from two centres, one in Belfast (Royal Victoria Hospital) and one in Altnagelvin, thus giving the best geographic coverage for the Northern Ireland population, while ensuring the standards for delivery of a high quality 24/7 service. The service at Altnagelvin was extended in May 2016 to serve patients from County Donegal, providing the potential for 50-60 ROI patients to benefit from this life-saving service which had otherwise been unavailable to them.

Primary PCI is a medical technology that clears blockages in the arteries which are stopping blood from flowing to the heart following a STEMI (ST Elevation Myocardial Infarction) heart attack. In pPCI, patients have the blockage in the blood vessels around their heart removed using a balloon or stent. Patients bypass the Emergency Department (ED) and are taken directly to the cath lab where they should have their procedure within 120 minutes from first call for medical help, before ideally transferring directly back to their local hospital for subsequent care.

Research shows that the benefits of pPCI in the first 30 days after a STEMI heart attack compared with thrombolysis include a reduction in mortality from 9% to 7%; a reduction in stroke from 2% to 1%; a reduction in re-infarction from 7% to 3%; and, a reduction in hospital stay.

## **5.6 Daisy Hill Hospital Newry**

Like Altnagelvin Hospital in the North West, Daisy Hill Hospital treats patients from both sides of the border. According to data provided by the Southern Health and Social Care Trust there were 885

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<sup>90</sup> Framework for All Island Clinical Network for Congenital Heart Disease, Department of Health, Republic of Ireland.

attendances from ROI patients from counties Monaghan, Louth and Cavan at Daisy Hill Hospital in 2016/17.

**Table 15: Summary of Attendances 2016/17**

Category	Total
Consultant Episodes	124
Regular Attendees	642
Day cases	119
<b>Total</b>	<b>885</b>

Source: Southern Health and Social Care Trust

In addition there were 708 new emergency care attendances at Daisy Hill Hospital by patients resident in the Republic of Ireland in 2015/16.

When the Southern trust announced the 24 hour accident and emergency service at the Newry hospital was unsustainable as it relied too heavily on locums, concerns were expressed by politicians<sup>91</sup> and campaign groups on both sides of the border.

In May 2017 it was announced that Daisy Hill Hospital's emergency department will remain a 24 hr service. There was relief all round when the decision was made by the Department of Health<sup>92</sup> that the service would be retained because of the "clinical need" and "projected population growth".

## 5.7 Cross Border Healthcare Services 2016<sup>93</sup>

Cooperation And Working Together (CAWT) is the cross-border health and social care partnership for the Health Service Executive in the Republic of Ireland and the Southern and Western Health and Social Care Trusts, the Health and Social Care Board and the Public Health Agency in Northern Ireland. The CAWT partnership evolved from an initial informal arrangement into an effective cross-border delivery and implementation structure for the partner organisations. Since its inception in 1992, CAWT has created and sustained a variety of EU funded cross-border projects and services and has enhanced service provision to many rurally isolated and peripheral areas.

In the most recent tranche of projects CAWT managed a range of cross-border health and social care programmes funded by €30 / £24 million from the EU INTERREG IVA programme until 2014/2015. Under the overarching programme called 'Putting Patients, Clients and Families First,' 12 large scale, strategic, cross-border health and social care service projects were delivered across the border region and within the eligible area of Northern Ireland. CAWT works collaboratively with a range of non-statutory organisations in the border area to provide specific strands of the project.

The 12 cross border health and social care services projects were:

1. Cross border acute hospital services (Vascular, ENT, Urology and Ophthalmology);

<sup>91</sup> [http://www.newrydemocrat.com/articles/news/56808/patient-increase-highest-at-daisy-hill/\\_and\\_http://www.newry.ie/news/latest-news/4863-trust-seem-set-on-closing-daisy-hill-emergency-department](http://www.newrydemocrat.com/articles/news/56808/patient-increase-highest-at-daisy-hill/_and_http://www.newry.ie/news/latest-news/4863-trust-seem-set-on-closing-daisy-hill-emergency-department)

<sup>92</sup> <http://www.bbc.co.uk/news/uk-northern-ireland-39787170>

<sup>93</sup> NI Assembly Research and Information Service Briefing Paper 70/16 13th October 2016 NIAR 368-16 Dr Janice Thompson. Health and Social Care in NI - Areas of EU Competence, Action and Support - Potential Areas of Impact on Health and Social Care as a result of EU Referendum Decision

2. Additional and new sexual health / GUM clinics;
3. Eating Disorder services;
4. Alcohol abuse prevention/early intervention;
5. Improving outcomes for Children and Families;
6. Support for Older People via Telehealth and Social supports;
7. Citizenship for People with Disabilities;
8. Diabetes Education and Clinics;
9. Prevention and Management of Childhood Obesity;
10. Social Exclusion /Health Inequalities;
11. Cross Border Workforce Mobility; and
12. Autism Support.

CAWT observes that the 12 projects have, for the most part, delivered economies of scale and have provided the critical mass of population on either side of the border to justify provision of certain services. The suite of cross border services and initiatives were delivered in the border region which benefitted 53,000 service users. CAWT reports that substantial proportion of services funded by the EU INTERREG IVA programme have continued after the conclusion of EU funding as planned. CAWT estimated that up to 80% of services/projects have been either fully or partially mainstreamed or adapted into core services by the relevant departments. In addition, 43,587 health and social care staff received training as part of the overall programme. Full details of the mainstreaming of EU INTERREG IVA funded projects are presented in Table 29 Annex 3.

## 5.8 Cross border maternity services

The provision of cross border health services includes maternity services. Table 16 shows the number of hospital births in Northern Ireland to Mother's who live in Republic of Ireland by Health and Social Care Trust between 2011 and 2015. On average there were 280 children born to ROI resident mothers in Northern Ireland hospitals. Unsurprisingly, 97% of births were in the health trusts closest to the border.

**Table 16: Births in Northern Ireland by residents of the Republic of Ireland, by NI Health Board**

H&SC Trust	2011	2012	2013	2014	2015	Total 2011-15	Percentage 2011-15 (%)
BHSCT	7	10	18	5	5	45	3.2%
NHSCT	0	0	0	0	0	0	0.0%
SEHSCT	0	0	0	0	0	0	0.0%
SHSCT	271	183	88	73	47	662	47.3%
WHSCT	166	139	138	109	141	693	49.5%
<b>Total</b>	<b>444</b>	<b>332</b>	<b>244</b>	<b>187</b>	<b>193</b>	<b>1,400</b>	<b>100.0%</b>

Source: NI Health Board 2017, Unpublished

## 5.9 Cooperation on EU funded Programmes

The Special EU Programmes Body is a North/South Implementation Body sponsored by the Department of Finance in Northern Ireland and the Department of Public Expenditure and Reform in Ireland. It is responsible for managing two EU Structural Funds Programmes, PEACE IV and INTERREG VA which are designed to enhance cross-border co-operation, promote reconciliation and create a more peaceful and prosperous society. The following paragraphs provide more details on the PEACE and INTERREG Programmes.

### **Northern Ireland and the Border Region of Ireland - PEACE III**

The EU Programme for Peace and Reconciliation in Northern Ireland and the Border Region of Ireland (2007-2013) (the PEACE III Programme) was a distinctive European Union Structural Funds Programme aimed at reinforcing progress towards a peaceful and stable society and promoting reconciliation. It promoted social and economic stability in the region by supporting actions to promote cohesion between communities in Northern Ireland and the Border Region, focussing on reconciling communities and contributing towards a shared society. A total of €224.8 million funding was allocated for PEACE III, with a further €229.1 million allocated for PEACE IV<sup>94</sup> (2014-2020). The Programme carried forward key aspects of the previous peace programmes (PEACE I and II) and had a continued emphasis on reconciliation.

#### **Case Study 5: The Termon Project<sup>95</sup>**

Fermanagh District Council in partnership with Donegal County Council, and ADoPT (Association for the Development of Pettigo and Tullyhommon), undertook a major regeneration project which secured €8.3m in PEACE III funding, to deliver revitalisation of the area and the provision of cross-community facilities in the border villages of Pettigo and Tullyhommon, on the Donegal/Fermanagh border.

The Termon Project involved developing The Riverside Walkway and new footbridge across the river Termon uniting both villages across the border. In addition a multi-purpose venue of 22,000 sq. ft was constructed with a new playgroup building and a youth hub. This provides a range of modern purpose designed facilities for all groups in the wider community. The core project is located at the current community centre site in Pettigo and the Methodist Hall in Tullyhommon.

### **INTERREG IVA - Cross-border Programme for Territorial Co-operation**

The INTERREG IV Programme was an EU supported Structural Funds Programme which aimed to promote cohesion. The overall theme of the Programme was to strengthen and deepen cross border co-operation with an emphasis on supporting strategic plans and projects which would maximise the impact of the funds throughout the eligible area. The INTERREG IV Programme aimed to support strategic Programme co-operation for a more prosperous and sustainable region. In particular, the Programme focused on developing a dynamic economy, supporting infrastructure and promoting

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<sup>94</sup> PEACE III and PEACE IV are joint Northern Ireland /Republic of Ireland Allocations.

<sup>95</sup> [https://www.seupb.eu/sites/default/files/Past%20Programmes/PIII\\_ProjectCaseStudy\\_Termon.pdf](https://www.seupb.eu/sites/default/files/Past%20Programmes/PIII_ProjectCaseStudy_Termon.pdf)

innovative ways of addressing specific regional problems. INTERREG IVA secured €192.0 million in funding, with INTERREG VA securing €240.3 million<sup>96</sup>.

#### **Case Study 6: North West Regional Science Park<sup>97</sup>**

The NW Regional Science Park secured €13.9 million in INTERREG IVA funding for the construction of a 50,000sq. ft science park facility at Fort George in Derry~Londonderry and a 20,000sq. ft extension to the CoLab facility at Letterkenny Institute of Technology.

Project partners included the Northern Ireland Science Park (NISP<sup>98</sup>) Foundation Ltd, Letterkenny Institute of Technology and the North West Region Cross Border Group (NWRCBG). The key project achievements included the establishment of two connected science parks with above target occupancy rates and the creation of 265 jobs.

The NW Regional Science Park has become established as the hub for developing future science and technology-oriented businesses in the North West of Ireland. It was designed with flexibility and connectivity in mind, to cater for the changing needs of modern, knowledge-based businesses. It has high-spec workspace facilities, and is a peer-driven network providing support for entrepreneurship, investment and growth. It provides a focal point for balanced regional development, addressing particular challenges in the North West and building on cross-border opportunities. Higher and further education institutions within the Derry~Londonderry and Donegal provide a pipeline into the Science Park. It is a hub for international business activity, encouraging foreign inward investment, stimulating job creation and providing local companies with a launch pad to global markets.

## **5.10 Summary**

There is a long history of people on either side of the border living connected lives due to family ties and relationships.

The Northern Ireland Census 2011 (NISRA) captured information of those resident in Northern Ireland at that point in time.

- In 2011, there were 38,000 residents in Northern Ireland who were born in the Republic of Ireland (2% of the total NI population of 1.8 million).
- Of the 38,000 residents the largest numbers lived in Derry City and Strabane district council (18%); Belfast district council (16%); Newry, Mourne and Down and Fermanagh & Omagh district councils (both 14%).

The Central Statistics Office's Census 2016 captured information of those people resident in the Republic of Ireland who were born in Northern Ireland. The Census 2016 results show:

- In 2016, there were 57,000 residents in the Republic of Ireland who were born in the Northern Ireland (1% of the total population).

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<sup>96</sup> INTERREG IVA and INTERREG VA are joint Northern Ireland/Republic of Ireland /Scotland allocations.

<https://www.seupb.eu/piv-overview>

<https://www.seupb.eu/iva-overview>

<sup>97</sup> [https://www.seupb.eu/sites/default/files/Past%20Programmes/IIVA\\_Case\\_Study\\_NWSciencePark.pdf](https://www.seupb.eu/sites/default/files/Past%20Programmes/IIVA_Case_Study_NWSciencePark.pdf)

<sup>98</sup> The NI Science Park was rebranded to Catalyst Inc in June 2016

- Of the 57,000 residents, 27,000 (49%) lived in counties that shared a border with Northern Ireland.

Derry City and Strabane District Council work closely with their counterpart in Donegal County Council as do Newry, Mourne and Down District Council and the Louth Local Authorities to promote the economic development and competitiveness of the regions.

A number of public services are also provided by NI institutions to ROI catchment areas. For example, health and social care services are provided on a cross border basis. This includes cancer treatment in the North West of Northern Ireland and children's cardiac care, which is provided on an all Island basis in Dublin. General hospital treatment, maternity services and A&E care are provided on a cross border basis, for example, at Daisy Hill hospital in Newry.

Closer social and economic integration across the border has been a longstanding policy objective of the UK, ROI and the EU. For example, the EU has provided funding of €432.2 million to support PEACE and economic development (INTERREG) projects on a cross border basis for 2014-2020.

## 6. CROSS BORDER MOVEMENTS AND MIGRANTS

The majority of the figures presented in this paper do not attach a nationality to the persons making the cross border movements. It is worth noting that, while net migration into Northern Ireland is small relative to the rest of the UK there are a significant number of people living in Northern Ireland from EU26 or non EU member countries.

Consideration should be given to these people in the development of the policy for the Common Travel Area and Migration more widely so there is consistency between them.

This section provides information on:

- Population statistics for Northern Ireland.
- Residents of Northern Ireland from the EU26 and or the Rest of the World (ROW).
- Employment of Migrants.
- Summary.

### 6.1 Population statistics for Northern Ireland.

According to the 2011 Census<sup>99</sup> there were 1,810,863 people living in Northern Ireland. 89% of these individuals were born in Northern Ireland, with just under 5% born in the Rest of the UK, 2% born in the ROI, 2.5% born elsewhere in the EU26 and 2% born in the ROW. Excluding those who were born in the rest of the UK and ROI, the migrant population in Northern Ireland in 2011 comprised of just over 81,300 people representing 4.5% of the population at that point. 45,300 people were from the EU26 and almost 36,000 people were from the ROW.

**Table 17: Population statistics for Northern Ireland in 2011**

Country of Birth	Usual residents	Share of Population
Northern Ireland	1,608,853	88.8%
Rest of UK	82,824	4.6%
ROI	37,872	2.1%
EU26	45,330	2.5%
Rest of World (ROW)	35,984	2.0%
<b>Total census population</b>	<b>1,810,863</b>	<b>100%</b>

Source: NISRA Census (2011), CT0407NI<sup>100</sup>

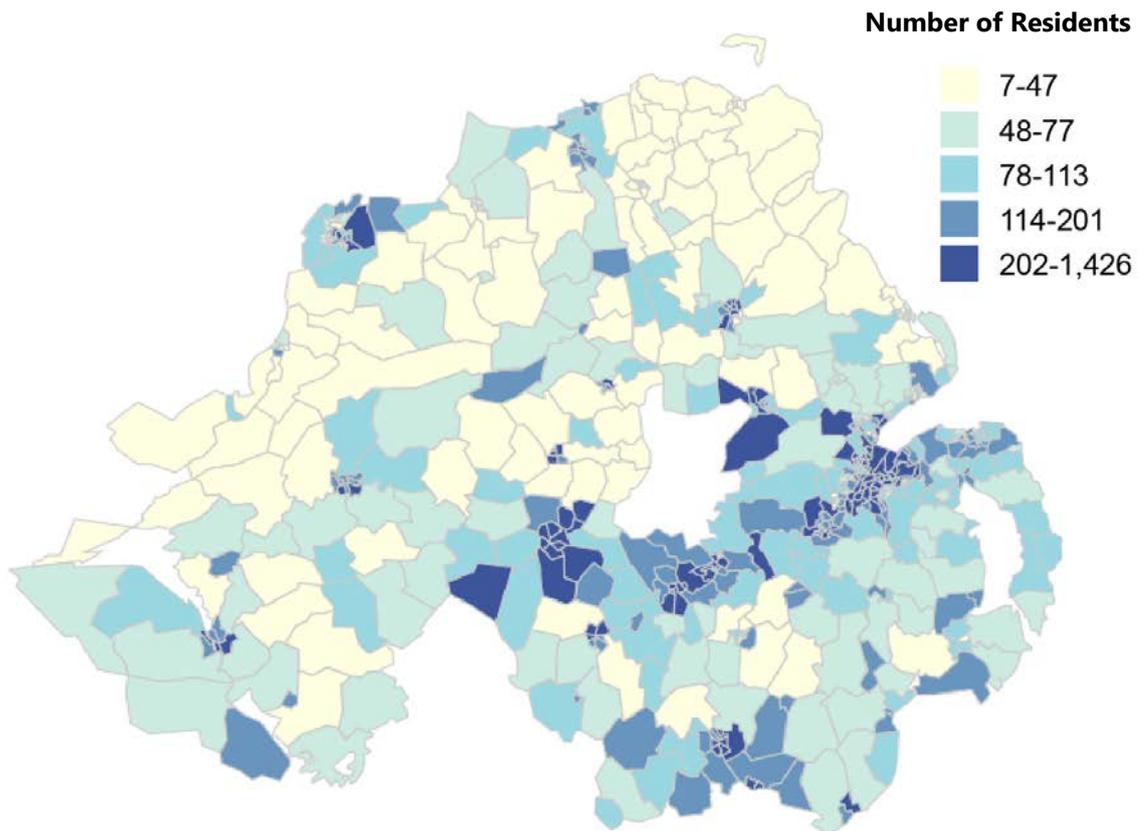
<sup>99</sup> <https://www.nisra.gov.uk/statistics/census/2011-census>

<sup>100</sup> CT0339NI is the reference number for the data table. It can be retrieved from the NISRA website (<http://www.ninis2.nisra.gov.uk/public/AdvancedSearch.aspx?sk>).

## 6.2 Domicile of residents of Northern Ireland born outside the UK and Ireland

Of the 81,300 residents from the EU26 and ROW, the largest numbers lived in Belfast City Council (24%), Armagh City, Banbridge and Craigavon Borough Council (13%), and Mid Ulster District Council (11%). As reported in Table 18, 44% of EU26 and ROW residents lived in councils located next to the border. Figure 15 illustrates the density of residents in Northern Ireland from the EU26 and ROW.

**Figure 15: Number of residents living in Northern Ireland who were born in EU26 and ROW by ward, 2011**



Source: Northern Ireland Census 2011, NISRA

**Table 18: Number of residents living in Northern Ireland who were born in EU26 and ROW by Local Government District, 2011**

Local Government District	Population	Residents of EU26 and ROW
<b>Antrim and Newtownabbey</b>	138,567	5,940
<b>Ards and North Down</b>	156,672	5,341
<i>Armagh City, Banbridge and Craigavon (Border LGD)</i>	<i>199,693</i>	<i>10,846</i>
<b>Belfast</b>	333,871	19,949
<b>Causeway Coast and Glens</b>	140,877	4,115
<i>Derry City and Strabane (Border LGD)</i>	<i>147,720</i>	<i>3,782</i>
<i>Fermanagh and Omagh (Border LGD)</i>	<i>113,161</i>	<i>4,549</i>
<b>Lisburn and Castlereagh</b>	134,841	5,786
<b>Mid and East Antrim</b>	135,338	4,824
<i>Mid Ulster (Border LGD)</i>	<i>138,590</i>	<i>9,075</i>
<i>Newry, Mourne and Down (Border LGD)</i>	<i>171,533</i>	<i>7,246</i>
<b>Border LGDs</b>	<b>770,697</b>	<b>35,498</b>
<b>Northern Ireland</b>	<b>1,810,863</b>	<b>81,453</b>

Source: NISRA Census (2011), KS204NI

### 6.3 Employment of Migrants

At the point of the Census in 2011, there were just over 29,000 persons from the EU26 and 20,100 persons from ROW in employment in Northern Ireland. Together they accounted for over 49,000 people in employment, which was for 6.2% of the residents aged 16 to 74 in employment. That proportion has since increased at an estimated 9.2% (61,000 people) for the period July to September 2017 according to recent Labour Force Survey statistics<sup>101</sup>.

**Table 19: Employment statistics for Northern Ireland in 2011 (usual residents aged 16 to 74 in employment)**

	All usual residents aged 16 to 74 in employment	Share of employment
<b>Northern Ireland</b>	687,643	86.5%
<b>Rest of UK</b>	41,777	5.3%
<b>ROI</b>	16,711	2.1%
<b>EU26</b>	29,038	3.7%
<b>Rest of World (ROW)</b>	20,094	2.5%
<b>Total census population</b>	<b>795,263</b>	<b>100%</b>

Source: NISRA Census (2011), CT0350NI

<sup>101</sup> NISRA, Labour Force Survey, July – September 2017

As reported in Table 20, 5% of migrants from the EU26 and ROW (1,700 people) reported that their main place of work was outside Northern Ireland. In addition to those travelling across the border for work, it is reasonable to assume that the EU26 and ROW migrants will make cross border trips for social, leisure and other purposes.

**Table 20: Location of place of work**

Country of birth	All usual residents aged 16 to 74 in employment	Place of work: Northern Ireland	Place of work: Outside of Northern Ireland
<b>Residents aged 16 to 74 in employment</b>	795,263	763,006	32,257
<b>Northern Ireland</b>	86%	87%	83%
<b>Rest of UK</b>	5%	5%	6%
<b>ROI</b>	2%	2%	6%
<b>EU26</b>	4%	4%	3%
<b>ROW</b>	3%	3%	2%

Source: NISRA Census (2011), CT0350NI

The location of migrants in close proximity to the border is a good indicator of the number and frequency of such cross border trips. Therefore it is important the policy for the CTA and Migration recognises that a reasonable share of the people crossing the border between Northern Ireland and ROI will be residents in, but not citizens of the UK and/or Ireland.

## 6.4 Summary

According to the 2011 in Census there were 45,300 people from the EU26 and almost 36,000 people from the ROW living in Northern Ireland, which accounted for 4.5% of the total population. In 2011 migrants from the EU26 and ROW accounted for 6.2% of the residents aged 16 to 74 in employment. This figure has grown to an estimated 9.2% in the more recent Labour Force Survey.

Given their work locations (i.e. 1,700 cross border workers) and where they live in Northern Ireland (44% in district councils located next to the border), it is reasonable to assume that on annual basis EU26 and ROW migrants will make a significant number of cross border trips. This is something that policy makers should consider when formulating the policy for the CTA and Migration more generally.

# 7. SUMMARY

## 7.1 CROSS BORDER MOVEMENTS<sup>102</sup>

- According to NI traffic count data, there is an average of 118,000 vehicle cross border crossings each day on the major roads. The majority of border crossing points (on more minor roads) are not included in this figure. This equates to a minimum of 43 million annual cross border journeys.
- Transport modelling suggests that the true figure could be closer to 163,000 vehicle and 243,000 person crossings each day for the 12 peak period (7am to 7pm).
- This gives an annual estimate of 89 million person crossings for the 12 hour period each year. Extrapolating this figure for a 24 hour period would give an estimated annual total in the region of 110 million person crossings.
- Cross border commuters estimated to be 23,000 – 29,000 people each day. Based on the available information, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable.
- Almost 2,200 ROI domiciled students were enrolled at Higher Education institutions in Northern in 2015/16, with a further 1,900 ROI residents attending Further Education colleges in the border areas.
- In 2016/17 there were 370 pupils resident in ROI attending primary and post primary schools in Northern Ireland.
- 1.8 million people used NI public transport to cross the border in 2016/17 (876k train and 900k bus).
- There were 2.63 million air passenger journeys from NI airports by GB residents and 300k by ROI residents in 2016.
- There were 12.8 million passenger flows between ROI and GB in 2016.
- 6.6 million air passenger journeys from ROI airports were made by GB residents and 1.02 million by NI residents in 2016.
- 2.04 million sea passenger journeys made between NI and GB in 2016.
- There were 2.7 million sea passenger journeys between ROI and GB in 2016.
- In 2015 there were 0.4 million laden journeys and 6.4 million tonnes carried cross border. This represented 10% of goods lifted by NI registered HGVs.
- In 2015 there were 3.9 million tonnes carried cross border by ROI HGVs. This represented 3.3% of goods lifted by ROI registered HGVs.

## 7.2 TOURISM

- 1.4 million overnight trips from GB visitors to NI in 2016.
- 456k overnight trips from ROI visitors to NI in 2016.
- 91% of GB visitors to NI arrived through NI sea and airports.
- 64% of the non UK and Ireland visitors to NI arrived via ROI. (448k of 700k total).
- Expenditure by GB and ROI visitors to NI was £386 million, which was 63% of all external visitor expenditure.

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<sup>102</sup> Further work continues around developing population estimates of cross border movements.

- In 2016 there were 3.7 million visits to Ireland from Great Britain made by Great Britain residents.
- There were 2.63 million visits to Great Britain from Ireland by residents of Ireland.

### 7.3 CROSS BORDER SHOPPING

- InterTradeIreland figures record that ROI registered cars account for, on average, 47% occupancy of car parks for selected cross border NI shopping centres between Q3 2008 car and Q1 2017.
- 2 cross border shopping centres report a combined average 4,100 of Irish registered cars in their car parks each week using number recognition software.
- In the 12 months to Q2 2010, the Irish CSO estimated that total household expenditure on shopping in NI was €418 million. This was £72.2 million in GVA terms, which was approx. 2% of GVA for the wholesale/retail sector.

### 7.4 CROSS BORDER COMMUNITIES AND CO-OPERATION

- There is a long history of people on either side of the border living connected lives due to family ties and relationships.
- The Northern Ireland Census 2011 (NISRA) captured information of those resident in Northern Ireland at that point in time.
  - In 2011, there were almost 37,800 residents in Northern Ireland who were born in the Republic of Ireland (2% of the total NI population of 1.8 million).
  - Of the 37,800 residents, the largest numbers lived in Derry City and Strabane district council (18%); Belfast district council (16%); Newry, Mourne and Down and Fermanagh & Omagh district councils (both 14%).
- The Central Statistics Office's Census 2016 captured information of those people resident in the Republic of Ireland who were born in Northern Ireland. The Census 2016 results show:
  - In 2016, there were 57,000 residents in the Republic of Ireland who were born in the Northern Ireland (1% of the total population).
  - Of the 57,000 residents, 27,000 (49%) lived in counties that shared a border with Northern Ireland.
- Closer social and economic integration across the border has been a longstanding policy objective of the UK, ROI and the EU. For example, the EU has provided funding of €432.2 million to support PEACE and economic development (INTERREG) projects on a cross border basis for 2014-2020.
- Derry City and Strabane District Council work closely with their counterpart in Donegal Country Council under the auspices of the North West Region Cross Border Group. Newry, Mourne and Down District Council and the Louth Local Authorities have a Memorandum of Understanding to support and promote the economic development and competitiveness of the region.
- Health and social care services are provided on a cross border basis. This includes cancer treatment in the North West and children's cardiac care on all Island basis in Dublin. General hospital treatment, maternity services and A&E care are provided on a cross border basis, for example, at Daisy Hill hospital in Newry.

- A wide range of health and social services were provided in the border regions, where the area border provided sufficient population centre of mass to justify the funding of such services. The majority of these services have been brought into the mainstream services, due to the positive outcomes delivered.

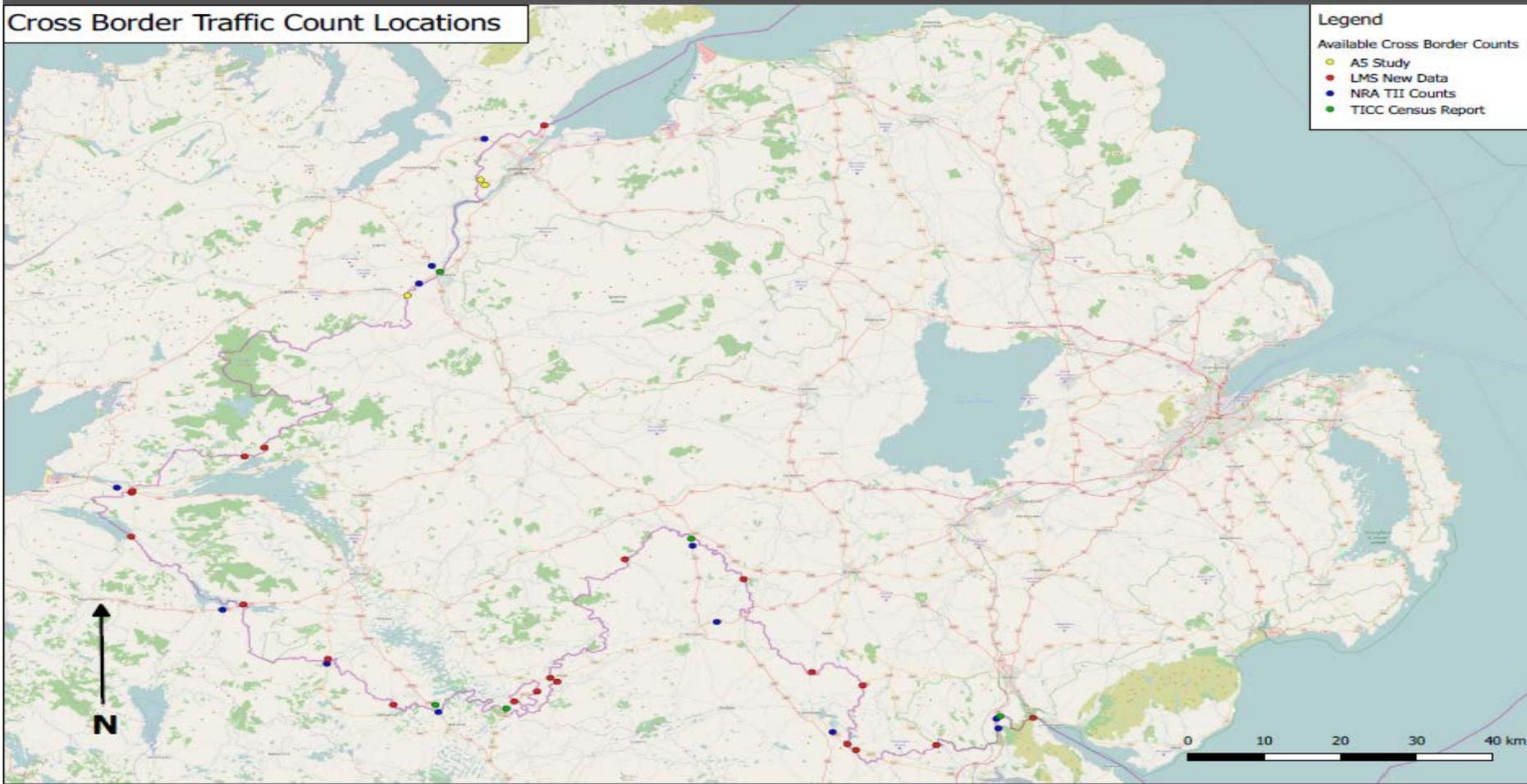
## **7.5 CROSS BORDER MOVEMENTS and MIGRANTS**

According to the 2011 in Census there were 45,300 people from the EU26 and almost 36,000 people from the ROW living in Northern Ireland, which accounted for 4.5% of the total population. In 2011 migrants from the EU26 and ROW accounted for 6.2% of the residents aged 16 to 74 in employment. This figure has grown to an estimated 9.2% in the more recent Labour Force Survey for July to September 2017.

Given their work locations (i.e. 1,700 cross border workers) and where they live in Northern Ireland (44% in district councils located next to the border), it is reasonable to assume that on annual basis EU 26 and ROW migrants will make a significant number of cross border trips. This is something that policy makers should consider when formulating the policy for the CTA and Migration more generally.

# ANNEX 1: CROSS BORDER MOVEMENTS

Figure 16: Cross Border Traffic Count Locations in Northern Ireland Transport Model



Source: Atkins June 2017. Transport Evidence Base

**Figure 17: Note on vehicle occupancy rates**



## Technical note 03

### 4. Cross Border Person Trips

The traffic movements have been subject to further secondary analysis to help estimate the number of person trips that may be generated. To provide this high-level indication of the number of cross border person trips the following national data sources have been used:

- National Travel Survey: England 2015 Table NTS0401
- National Travel Survey: GB 2015 Table NTS0906

Table 5-1 provides an estimate of car occupancy by trip purpose set out in Table NTS0906.

**Table 5.1 – Car Occupancy by Trip Purpose**

Trip Purpose	Occupancy NTS0906
Commuting	1.2
Business	1.2
Education	2.0
Shopping	1.7
Personal Business	1.4
Leisure	1.7
Holiday/Day Trip	2.0
Other	2.0

The following occupancy levels derived for each user class is shown in Table 5.2.

**Table 5.2 – Car Occupancy by User Class**

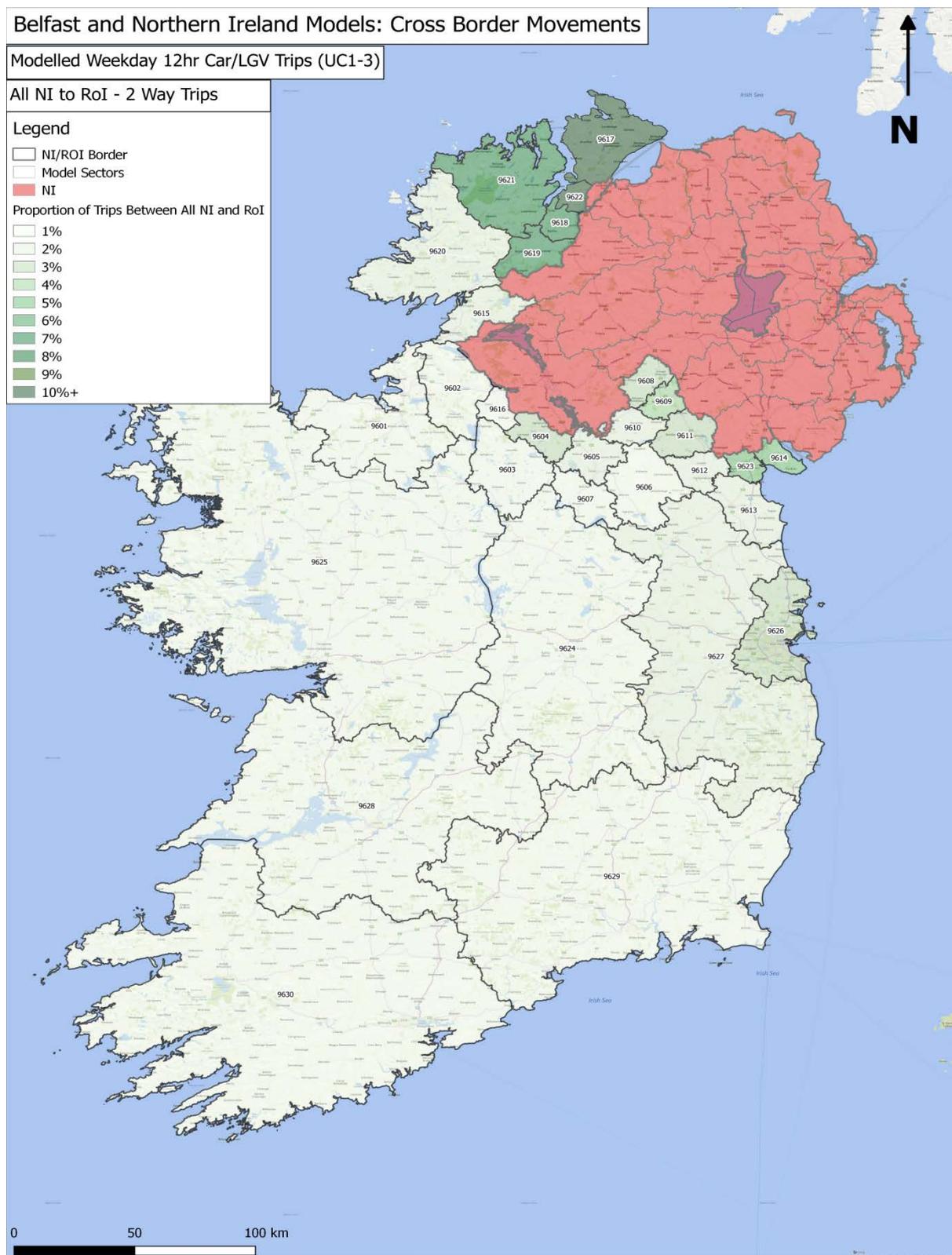
User Class	Trip Purpose	Occupancy
UC1	Business	1.2
UC2	Weighted average of Commuting, Education, Shopping, Personal Business and Leisure	1.8*
UC3	Business	1.2
UC4	Business	1.2

\*A weighted average of the occupancy has been taken using the percentage trip purpose set out in table NTS0401.

A summary of the total person trips is provided in tables 5.3 and 5.4.

Source: Atkins technical note (2017). <https://www.infrastructure-ni.gov.uk/publications/atkins-technical-note>

**Figure 18: Cross Border Movement – Car and LGV trips from NI to ROI**



Source: Atkins technical note (2017). <https://www.infrastructure-ni.gov.uk/publications/atkins-technical-note>

**Figure 19: Cross Border Movement – HGV trips from NI to ROI**

Belfast and Northern Ireland Models: Cross Border Movements

Modelled Weekday 12hr HGV Trips (UC4)

All NI to RoI - 2 Way Trips

**Legend**

□ NI/ROI Border

■ NI

Proportion of Trips Between All NI and RoI

□ 0-2%

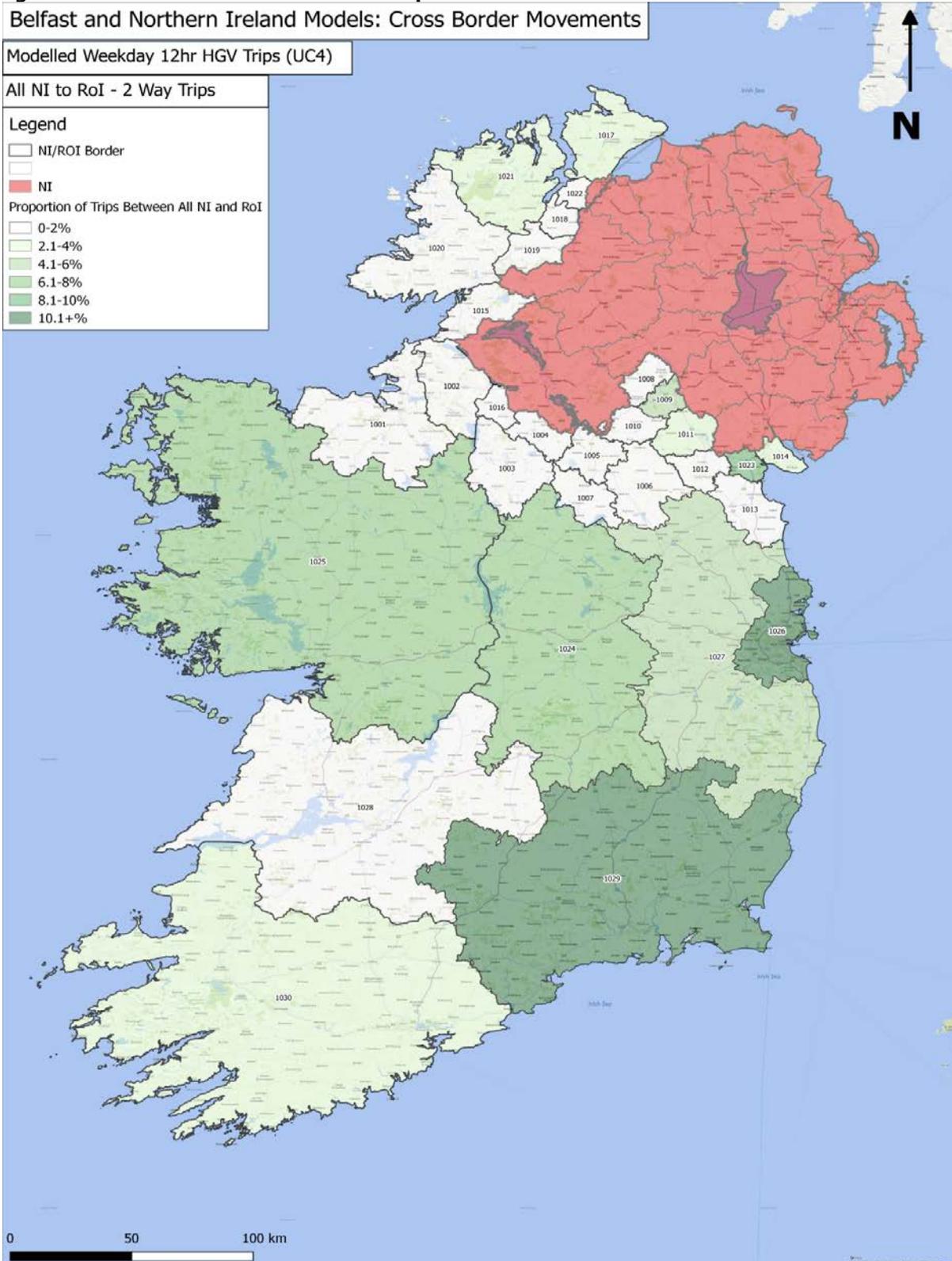
□ 2.1-4%

□ 4.1-6%

□ 6.1-8%

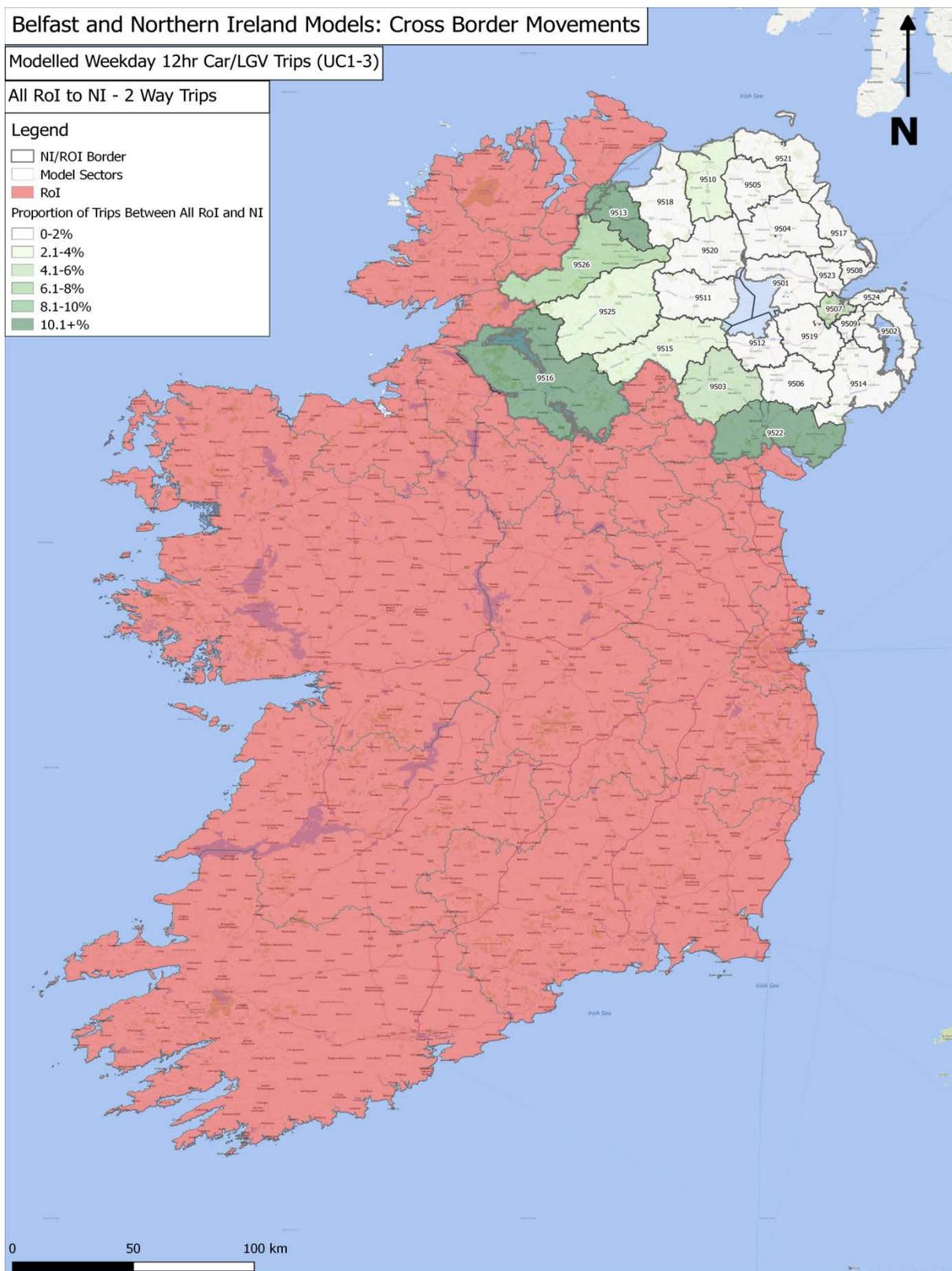
□ 8.1-10%

□ 10.1+%



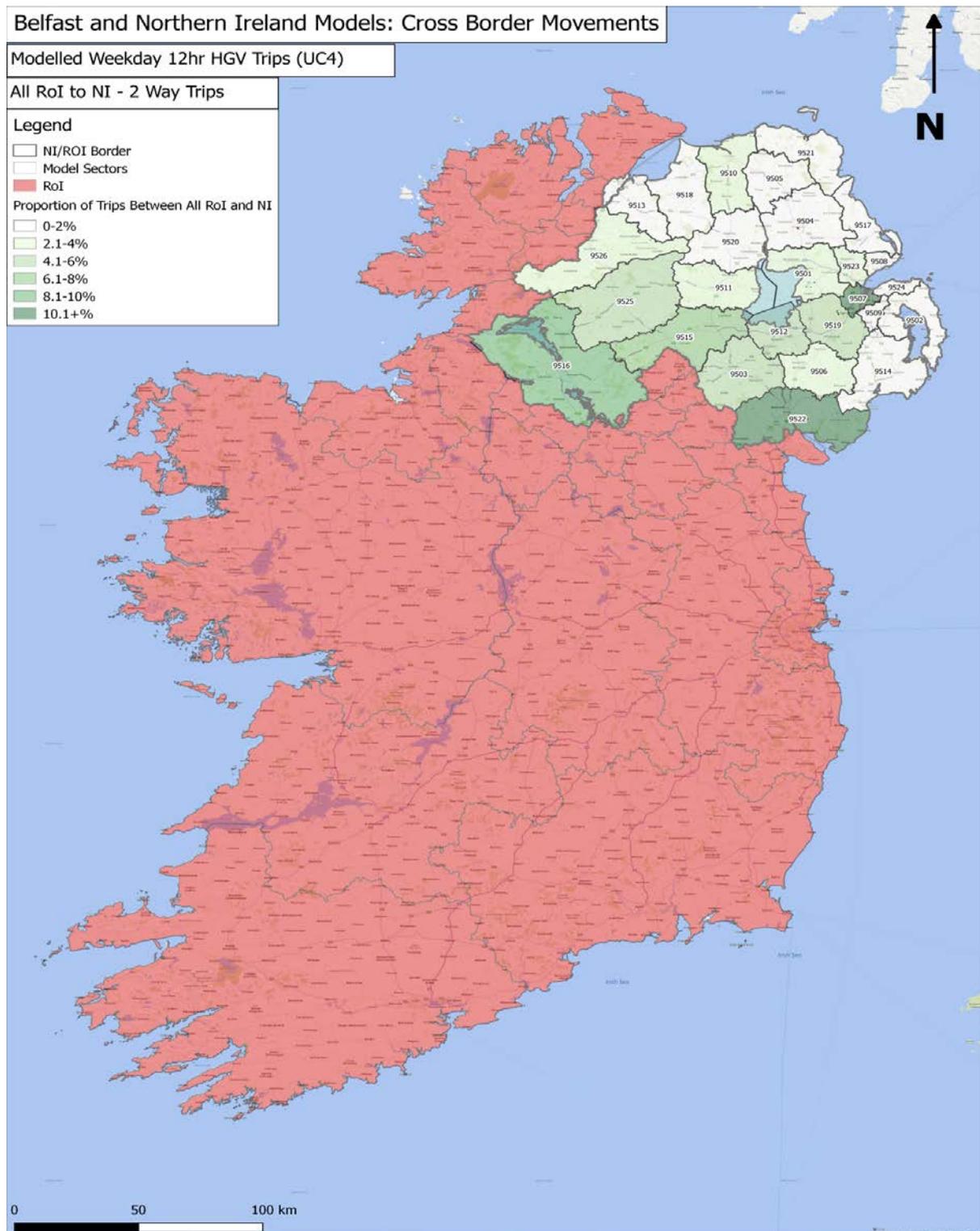
Source: Atkins technical note (2017). <https://www.infrastructure-ni.gov.uk/publications/atkins-technical-note>

**Figure 20: Cross Border Movement – Car and LGV trips from ROI to NI**



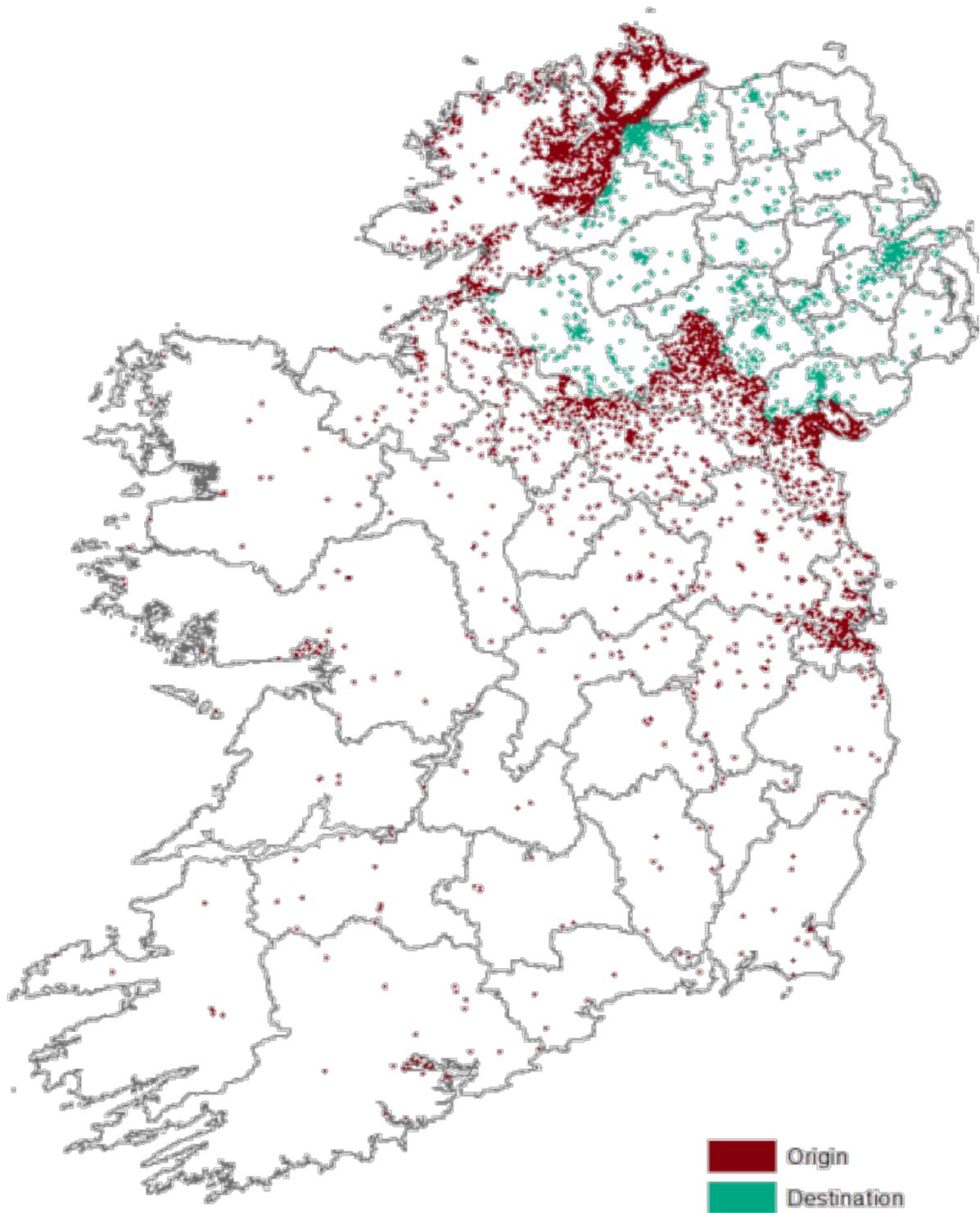
Source: Atkins technical note (2017). <https://www.infrastructure-ni.gov.uk/publications/atkins-technical-note>

**Figure 21: Cross Border Movement – HGV trips from ROI to NI**



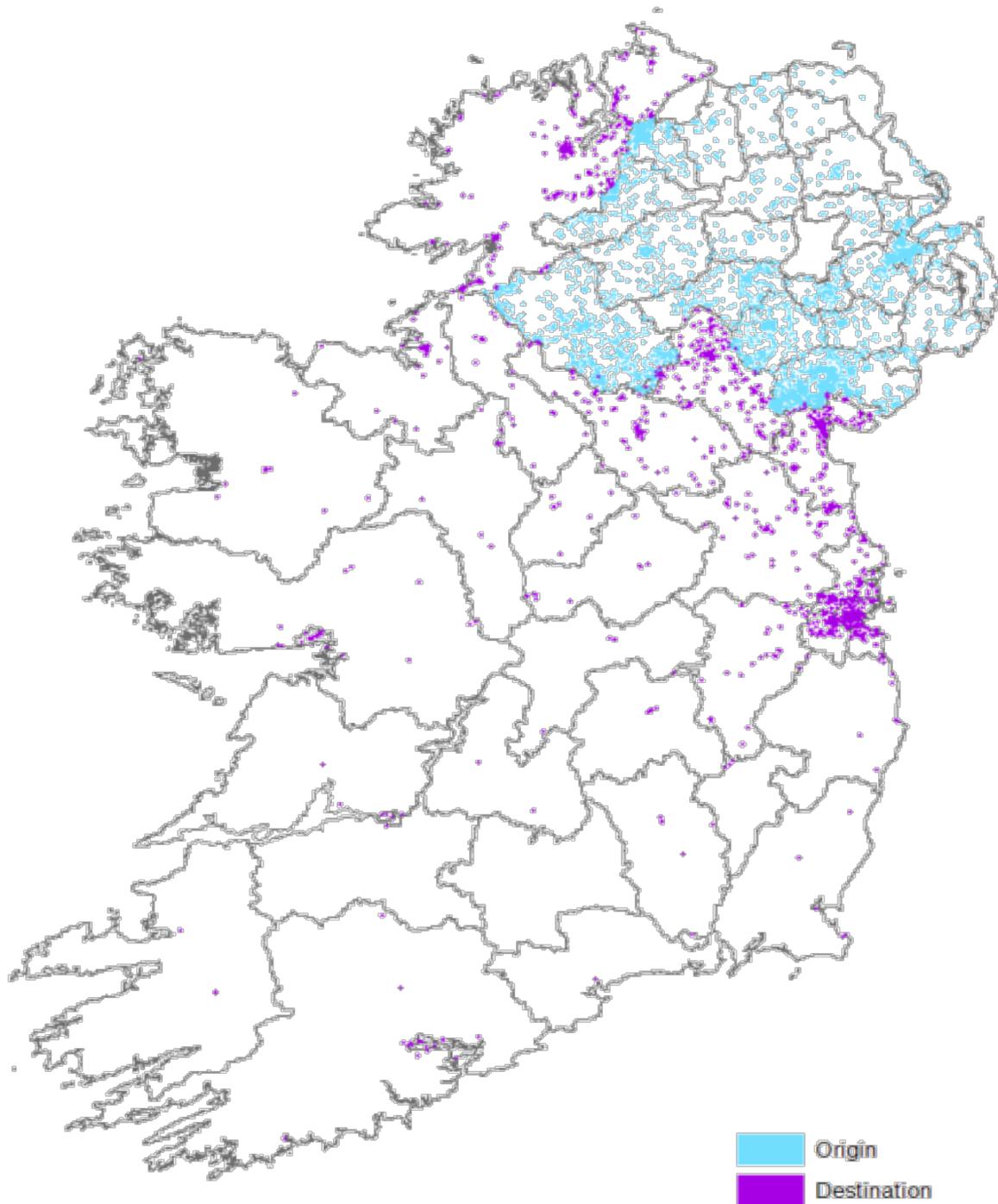
Source: Atkins technical note (2017). <https://www.infrastructure-ni.gov.uk/publications/atkins-technical-note>

**Figure 22: Origin and destination of cross-border commuters from Ireland to work or study in Northern Ireland – 8,295 Persons**



Source: CSO / NISRA. Census 2011 Ireland and Northern Ireland

**Figure 23: Origin and destination of cross-border commuters from Northern Ireland to work or study in Ireland –6,456 Persons**



Source: CSO / NISRA. Census 2011 Ireland and Northern Ireland

**Table 21: Northern Ireland Freight Data - cross border activity by NI registered vehicles (NI to Republic of Ireland or Republic of Ireland to NI journeys)**

<b>Year</b>	<b>Tonne-Kilometres</b>	<b>Tonnes Carried</b>	<b>Vehicle Kilometres</b>	<b>Laden Journeys</b>
	<i>million</i>	<i>thousand</i>	<i>million</i>	<i>thousand</i>
<b>2004</b>	1,357	9,894	174	701
<b>2005</b>	1,253	8,823	147	687
<b>2006</b>	1,550	12,580	188	877
<b>2007</b>	1,439	10,923	173	809
<b>2008</b>	1,019	7,368	121	522
<b>2009</b>	927	6,960	93	469
<b>2010</b>	1,173	8,050	113	474
<b>2011</b>	1,234	7,359	113	571
<b>2012</b>	1,246	7,964	126	567
<b>2013</b>	1,167	7,301	127	572
<b>2014</b>	1,224	7,832	129	534
<b>2015</b>	1,122	6,441	108	405

Source: Continuing Survey of Road Goods Transport Northern Ireland (CSRGT NI), DfT

**Table 22: Transport Activity classified by Country of origin and Region of destination, Goods lifted (thousand tonnes) by NI registered HGV's by country of origin and destination, 2015**

Region of Origin	Region of Destination			
	NI	ROI	GB & Other Countries	Total
<b>NI</b>	45,080	4,389	1,055	<b>50,524</b>
<b>ROI</b>	2,052	2,038	314	<b>4,404</b>
<b>GB &amp; Other Countries</b>	903	346	6,695	<b>7,944</b>
<b>Total</b>	<b>48,035</b>	<b>6,773</b>	<b>8,064</b>	<b>62,872</b>

Source: Continuing Survey of Road Goods Transport CSRGT NI, DfT

**Table 23: Goods moved (million tonnes km) by NI registered HGV's by country of origin and destination, 2015**

Region of Origin	Region of Destination			
	NI	ROI	GB & Other Countries	Total
<b>NI</b>	2,061	767	387	<b>3,215</b>
<b>ROI</b>	355	196	142	<b>693</b>
<b>GB &amp; Other Countries</b>	333	183	1,487	<b>2,003</b>
<b>Total</b>	<b>2,749</b>	<b>1,146</b>	<b>2,016</b>	<b>5,911</b>

Source: Continuing Survey of Road Goods Transport CSRGT NI, DfT

**Note:** Totals may not always exactly equal the sum of individual components, due to rounding.

'.' = none recorded in the sample or not available due to small sample size

**Table 24: Goods lifted (thousand tonnes) by ROI registered HGV's by region of origin and destination, 2015\***

Region of Origin	Region of Destination			
	NI	ROI	GB & Other Countries	Total
<b>NI</b>	300	1,611	28	<b>1,940</b>
<b>ROI</b>	2,277	111,191	663	<b>114,131</b>
<b>GB &amp; Other Countries</b>	57	721	1,208	<b>1,987</b>
<b>Total</b>	<b>2,634</b>	<b>113,523</b>	<b>1,900</b>	<b>118,059</b>

Source: Road Freight Transport Survey, CSO

**Table 25: Goods moved (million tonne-kilometres) by ROI registered HGV's by region of origin and destination, 2015**

Region of Origin	Region of Destination			
	NI	ROI	GB & Other Countries	Total
NI	23	202	16	<b>240</b>
ROI	354	7,707	497	<b>8,558</b>
GB & Other Countries	34	486	526	<b>1,046</b>
<b>Total</b>	<b>411</b>	<b>8,395</b>	<b>1,039</b>	<b>9,844</b>

Source: Road Freight Transport Survey, CSO

# ANNEX 2: TOURISM

**Table 26: Total External Tourism Expenditure (£)**

Reason for Visit	2012	2013	2014	2015	2016
<b>Total Expenditure</b>	<b>485,300,827</b>	<b>523,642,698</b>	<b>507,291,498</b>	<b>544,712,096</b>	<b>613,552,954</b>
<b>Visiting Friends &amp; Relatives</b>	182,650,496	204,917,989	218,019,705	219,428,859	257,110,938
<b>Holiday / Pleasure / Leisure</b>	135,763,903	164,699,535	158,265,016	165,206,622	197,038,665
<b>Business</b>	114,614,773	125,644,545	99,115,786	134,345,519	126,726,743
<b>Other</b>	52,271,655	28,380,629	31,890,991	25,731,097	32,676,608

Source: NISRA. Northern Ireland Annual Tourism Statistics

**Table 27: Total Domestic Tourism Expenditure (£)**

Reason for Visit	2012	2013	2014	2015	2016
<b>Total Expenditure</b>	<b>201,021,023</b>	<b>191,548,235</b>	<b>237,610,797</b>	<b>219,354,176</b>	<b>237,154,714</b>
<b>Visiting Friends &amp; Relatives</b>	134,922,302	120,122,311	148,031,152	156,495,505	176,356,340
<b>Holiday / Pleasure / Leisure</b>	39,068,233	33,748,708	68,316,027	47,391,065	44,181,120
<b>Business</b>	11,779,099	12,300,808	9,403,403	8,910,853	9,543,429
<b>Other</b>	15,251,390	25,376,408	11,860,215	6,556,753	7,073,825

Source: NISRA. Northern Ireland Annual Tourism Statistics

**Table 28: Total Tourism Expenditure (Domestic and External) (£)**

<b>Reason for Visit</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Total Expenditure</b>	<b>686,321,850</b>	<b>715,190,933</b>	<b>744,902,296</b>	<b>764,066,272</b>	<b>850,707,668</b>
<b>Visiting Friends &amp; Relatives</b>	317,572,798	325,040,300	366,050,858	375,924,364	433,467,277
<b>Holiday / Pleasure / Leisure</b>	174,832,136	198,448,242	226,581,042	212,597,686	241,219,785
<b>Business</b>	126,393,872	137,945,353	108,519,190	143,256,372	136,270,173
<b>Other</b>	67,523,044	53,757,037	43,751,206	32,287,850	39,750,433

Source: NISRA. Northern Ireland Annual Tourism Statistics

# ANNEX 3: CROSS BORDER CO-OPERATION AND COMMUNITIES

**Table 29: Mainstreaming of EU INTERREG IVA funded projects**

<b>Project/Service</b>	<b>Mainstreaming / adaption into core services after EU funding concluded</b>
<b>Acute Hospital Services - ENT</b>	Cross border ENT services established between the Health Service Executive (HSE), Dublin North East area and the Southern Health and Social Care Trust (HSCT) have continued.
<b>Acute Hospital Services - Ophthalmology</b>	Ophthalmology / Eye Treatment services - mainstreamed in HSE (Louth County Hospital).
<b>Sexual health / GUM clinics</b>	Additional Sexual health / GUM clinics established in the Western HSCT & Southern HSCT have been adapted into core services. New Sexual health / GUM clinics established in the HSE border counties (Letterkenny, Monaghan, Dundalk and Drogheda) have continued.
<b>Diabetes Services</b>	Two new Diabetes services were established across all of NI and HSE border counties: 1. Structured Patient Education (SPE) programme called CHOICE for children and young people who have diabetes. 2. Pre-pregnancy Care (PPC) Clinics. Both services have continued in full or have been incorporated into core services.
<b>Eating Disorders</b>	Eating Disorder services enhanced /established across the Southern and Western HSCTs and HSE border counties. Mainstreaming fully achieved in all CAWT areas.
<b>Border region alcohol project</b>	Some activities have been mainstreamed: Strengthening Families Programme (SFP) in the HSE - has been incorporated into core services in the HSE border counties. SFP funded by the Public Health Agency in NI (operating in the Belfast, Northern, South Eastern and Western HSCT areas).
<b>Older Person's Project</b>	Some activities have been mainstreamed/incorporated into core services/secured alternative funding: Telecare/assistive technology element (HSE West, HSE DNE and Southern and Western HSCT areas) Good Morning Louth service (HSE Louth) Armagh Men's Shed
<b>Prevention and Management of Childhood Obesity</b>	Project delivered in four sites in the border region. Childhood obesity is within remit of the PHA in NI and the HSE in the Republic of Ireland who continue to deliver activity in this area in partnership with community/voluntary sector and other statutory partners.
<b>Improving Outcomes for Children and Families</b>	Model developed by project incorporated into core services.
<b>Promoting Social Inclusion and Tackling Health Inequalities</b>	Selected activities continued to be delivered by the statutory health services, other statutory services and the community and voluntary sector.

<b>Autism Support Project</b>	Practical support provided to families and young people with ASD in relation to transitioning has continued within mainstream services.
<b>Cross Border Workforce Mobility – coaching skills</b>	Network of coaches developed across the health services. Coaching continues to support the change agenda in the health services in both jurisdictions.
<b>Cross Border Workforce Mobility – Manual Handling training</b>	Project resulted in standardised Manual Handling training being developed and delivered within both health services. Training continues to be delivered via on-line access.
<b>Cross Border Workforce Mobility Social Working Training</b>	Social work training continues to be delivered by the CAWT partner organisations.

Source: Thompson, J (2016). Paper 70/16 Health and Social Care in NI - Areas of EU Competence, Action and Support - Potential Areas of Impact on Health and Social Care as a result of EU Referendum Decision. Northern Ireland Assembly.