

Northern Ireland Annual Tourism Statistics 2015

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**4.5m
trips**



**15.4m
nights**



**£764m
spent**

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The key points are:

- in 2015 there were 4.5 million overnight trips in Northern Ireland. This figure includes both trips to Northern Ireland of external visitors and domestic trips taken by local residents. The number of overnight trips shows no change on 2014. Expenditure associated with these trips was £764m, up 3% from 2014;
- last year overnight trips to Northern Ireland by external visitors stood at 2.3 million. This is the highest number on record and a 6% increase on 2014. Spend associated with these trips also grew by 7% to £545m in 2015;
- last year there were 17.5 million visits to local visitor attractions. This showed no change from the previous year. In 2015 the most popular visitor attractions were the Giant's Causeway (0.851 million visits) and Titanic Belfast (0.622 million visits);
- during 2015 hotel room occupancy stood at 67%. This was an increase of 2 percentage points from 2014. In total 1.9 million hotel room nights were sold in 2015; and
- last year, 67 cruise ships docked at Northern Ireland ports. This is a similar number to 2014. These ships had up to 123,000 passengers/crew on board.

Frequency: Annual
 Coverage: Northern Ireland
 Theme: People and Places

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Introduction

Due to the complexity of tourism, no single statistic can provide a definitive measure on how the tourism industry is performing. This report provides a picture of Northern Ireland tourism in 2015. A variety of statistics are presented, such as estimates of the number of people staying overnight in Northern Ireland, rooms sold in local accommodation, cruise ship visits and visits to Visitor Attractions. **The report points towards growth in tourism from visitors outside of the island of Ireland, alongside a fall in domestic overnight trips.**

The report informs the Assembly and Executive, tourism bodies, the tourism industry and the public on data relating to tourism in Northern Ireland. A primary aim is to provide information on progress towards the Programme for Government tourism targets.

Tourism can be influenced by a number of factors. Initiatives from government, tourism agencies and events can have an impact on tourism. In 2015, Northern Ireland hosted the Irish Open in May and the opening stages of the Tall Ships in July. Last year also saw the Gobbins open a new Visitor Attraction in September. Alongside this, the international visibility our top golfers continues to attract visitors.

Other factors that impact on tourism include the impact of our local film industry with Game of Thrones showcasing local locations. However the legacy of the Troubles with less positive images around civil unrest can counter these positive pictures.

The economic situation also influences tourism expenditure. The strength of sterling (up 15% against the Euro) will have influenced levels of tourism last year. A strong pound acts to decrease external visitor spend and also decreases domestic tourist demand (as overseas destinations become more attractive). Finally, the weather is always an influence with some people finding the local moderate and varied climate appealing.

All these factors will influence the volume, type and nature of local tourism.



Tall Ships – Belfast*



Gobbins Cliff Path – Islandmagee*



Irish Open – Newcastle*

*Copyright, Tourism Northern Ireland

Overnight Trips in Northern Ireland (Domestic & External)

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

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

Overnight: Headline overnight trip statistics are measured using standard UN definitions. The UN use the concept of “overnighting”. This is broadly defined as staying away from your usual place of residence for one night or more. This does not need to be for holiday, it can also relate to visiting relatives, business etc. As well as overnighting of visitors to Northern Ireland the statistics also include overnights of local residents within NI. Note overnighting excludes day trips, which will be a significant part of the local tourism market.

The headline statistics for overnight trips are:

- in 2015, there were 4.53 million overnight trips in Northern Ireland. Whilst this shows no substantial change on 2014, the number of overnight trips in 2015, was higher than the period 2011-2013¹;
- during 2015, expenditure associated with all overnight trips was £764 million. This represented an increase of 3% from £745m in 2014. To put this annual expenditure (£764 million) in context, the 2014 estimate for NI Gross Value Added stood at £34.4 billion. Indicating that in monetary terms spending on overnight trips broadly equates to around 2% of the local economy; and
- associated with the 4.53 million overnight trips, 15.5 million nights were spent in Northern Ireland. This is 3% higher than in 2014.

Table 1 shows the trend in these three statistics (trips, nights and spend since 2011). As trip statistics are survey based estimates they are subject to associated confidence intervals (see [background](#) note 9).

¹ The Northern Ireland Statistics and Research Agency took over measurement of external and domestic overnight trips in 2010/2011. The methods used from 2011 for assessing **domestic** tourism cannot readily be compared with earlier data.

Table 1: Estimated number of overnight trips, nights and expenditure in Northern Ireland 2011-2015

	2011	2012	2013	2014	2015	% Change (2014-15)
Overall Trips (000s)	3,968	4,002	4,073	4,512	4,515	0%
<i>Domestic (000s)</i>	2,036	2,018	1,980	2,335	2,230	-4%
<i>External (000s)</i>	1,932	2,006	2,089	2,179	2,301	+6%
Overall Nights (000s)	14,690	13,791	14,487	15,065	15,432	+2%
<i>Domestic (000s)</i>	4,698	3,906	4,577	5,049	4,791	-5%
<i>External (000s)</i>	9,992	9,952	9,817	10,033	10,680	+6%
Overall Expenditure (£M)	641	689	722	751	760	+1%
<i>Domestic (£M)</i>	178	201	192	238	219	-8%
<i>External (£M)</i>	463	485	524	507	545	+7%

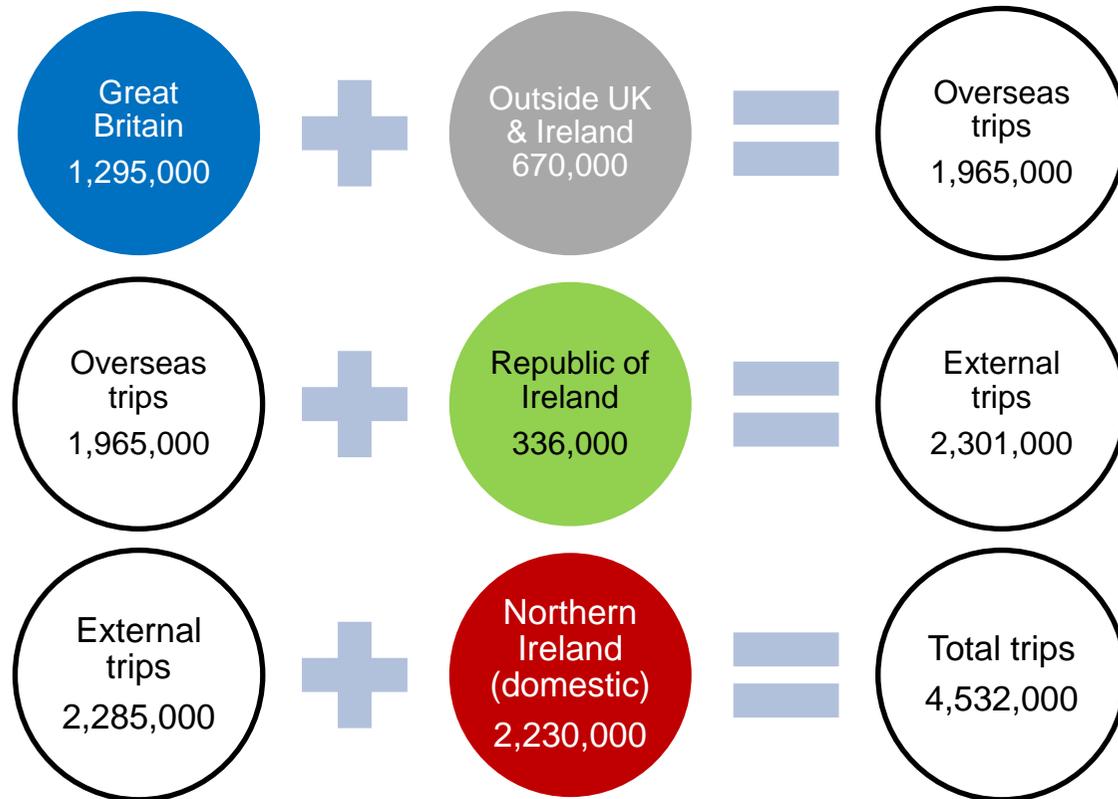
Figures derived from Northern Ireland Passenger Survey (NIPS) conducted by the Northern Ireland Statistics and Research Agency (NISRA), the Survey of Overseas Travellers (SOT) conducted on behalf of Fáilte Ireland, the Household Travel Survey (HTS) conducted by Central Statistics Office (CSO) and the Northern Ireland Continuous Household Survey (CHS) conducted by NISRA.

Full information on External overnight trips to Northern Ireland can be found at the following link: [External Visitors to Northern Ireland](#)
Full information on Northern Ireland domestic tourism can be found at the following link: [Domestic Tourism](#)

Place of origin

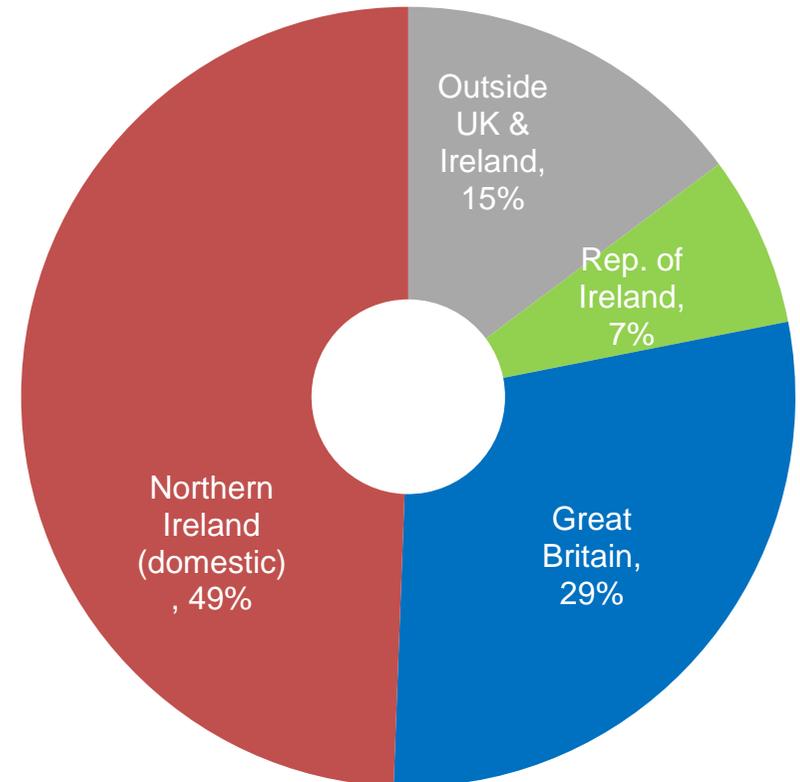
A further important part of the assessment of tourism is the place of origin of visitors to Northern Ireland. Figures 1 & 2 give some detail on this for 2015.

Figure 1: Overnight trips by place of origin (2015)



Rounded to the nearest thousand

Figure 2: Breakdown by place of origin (2015)

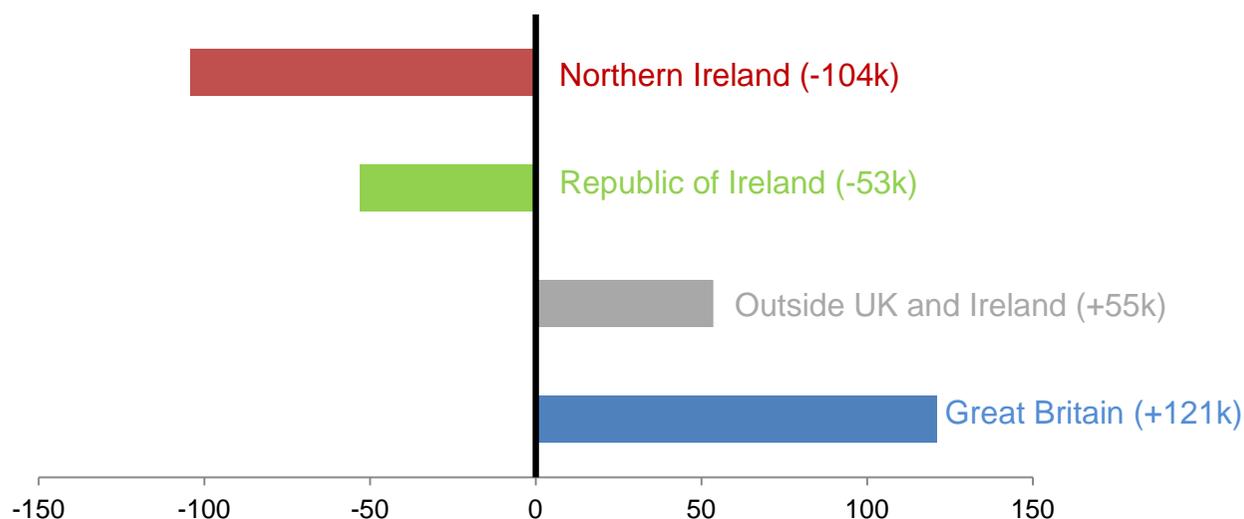


In total just under half (49%) of all overnight trips (2.2 million) were made by local residents (domestic trips). For example, someone from Belfast going to Fermanagh for the weekend either on holiday or to visit friends/relatives. A further 29% of overnight trips (1.3 million) were made by people living in Great Britain, 7% (0.3 million) by people from the Republic of Ireland and the remaining 15% (0.7 million) by people from outside the UK and Ireland.

In total, 43% or 2.0 million overnight trips to Northern Ireland were made by people who live outside the island of Ireland (Great Britain and Outside UK & Ireland – labelled overseas trips in Figure 1). Within these trips, the vast majority of Great Britain visitors (90%) arrive through Northern Ireland ports. In contrast two thirds (67%) of visitors from Outside UK & Ireland come through Republic of Ireland ports.

Figure 3 shows the change in the visitors to Northern Ireland in the last year. This shows that between 2014 and 2015, the number of visitors to Northern Ireland from Great Britain increased by 121,000 and those from outside GB and Ireland increased by 55,000. However, the number of domestic overnight trips taken by Northern Ireland (-104,000) and the Republic of Ireland (-53,000) residents both fell.

Figure 3: Change in number of overnight visitors (thousands) 2014-2015

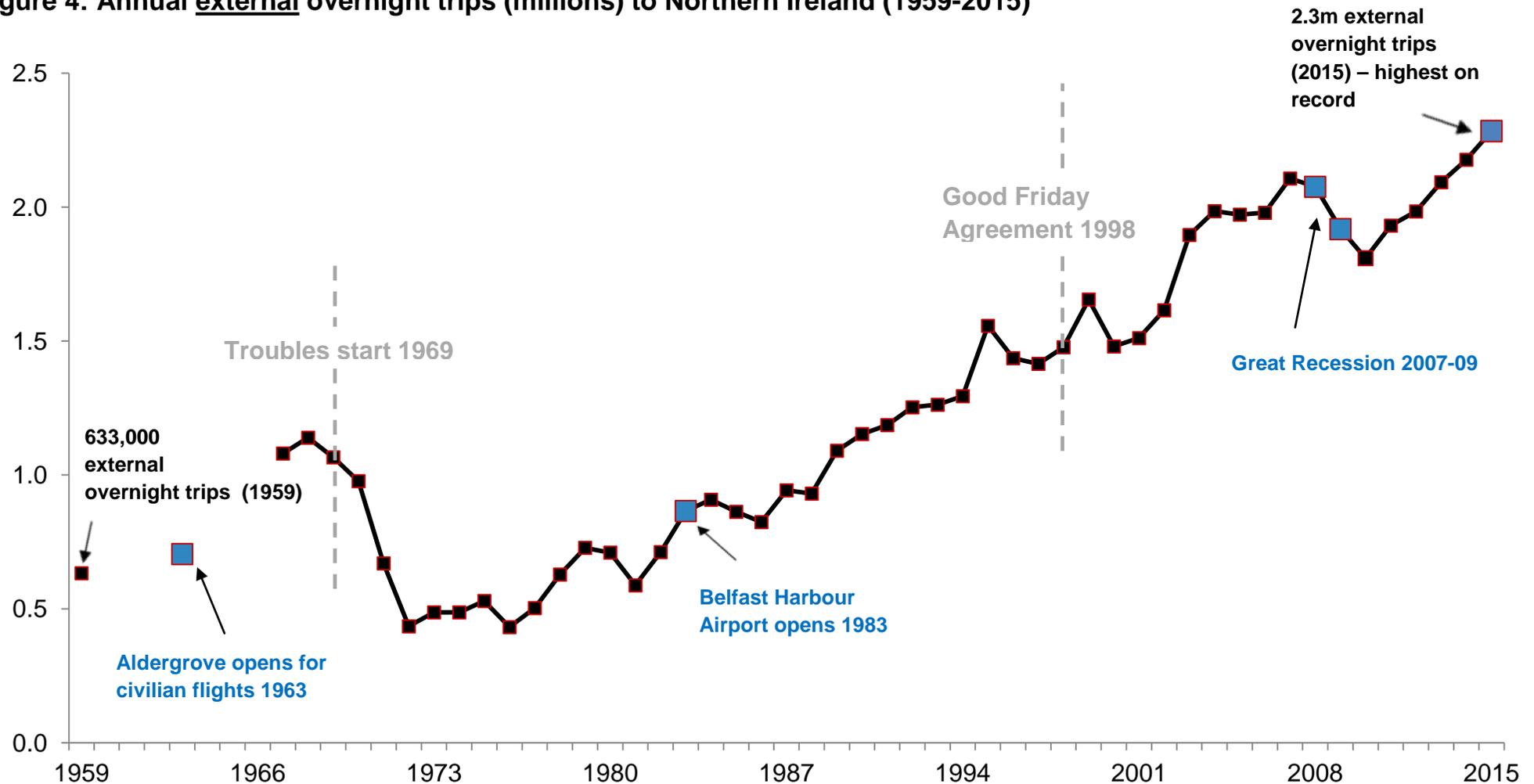


External trips

A major focus of the tourism industry is external visitors (resident outside Northern Ireland). In total there were 2.3 million external overnight trips in 2015, a 6% rise from 2014. Associated expenditure by this group of visitors also increased by 7% from £507m to £545m. While GB residents accounted for most of the growth in visitors, visitors from mainland Europe accounted for most of the increase in expenditure.

When assessing change in the number of external overnight trips, a longer time trend can be informative. Figure 4 shows the number of external overnight visitors by year from 1959 to 2015. The graph shows the impact of the start of the troubles, as well as the impact of the worldwide great recession in 2007-9. This second factor was not unique to Northern Ireland, indeed it had a similar impact globally.

Figure 4: Annual external overnight trips (millions) to Northern Ireland (1959-2015)



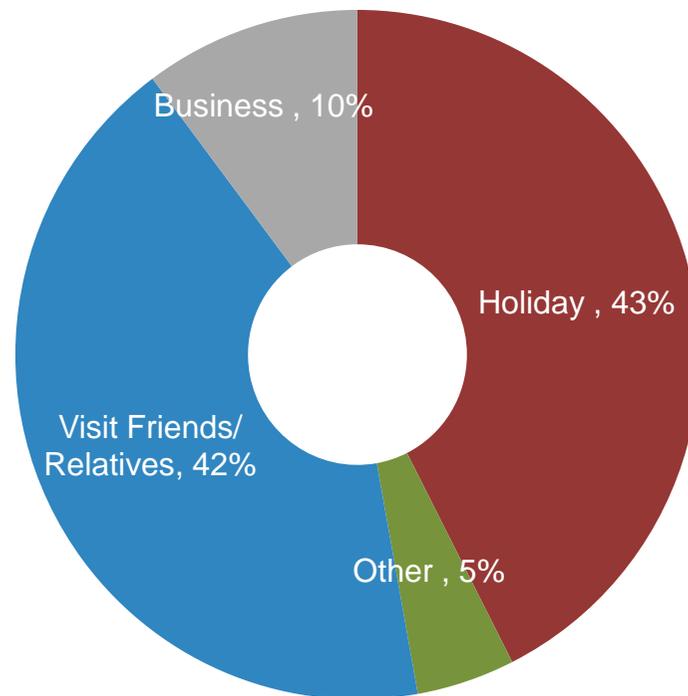
Sources: 1959-2010 Northern Ireland Tourist Board; 2010 onwards Northern Ireland Statistics and Research Agency

Note: There have been minor changes to the methodology and sources used to measure external overnight trips to Northern Ireland, but the graph still paints a representative picture of the trend over time. Figures for residents of the Republic of Ireland have been included from 2000 onwards (RoI make up approximately 13% of the total). This is the longest timescale available as data for NI tourism begins in 1959.

Reason for Overnight Trip

Survey respondents are also asked the reason they stayed overnight; the results are shown in Figure 5. The two mainstays of the local market are visiting friends/relatives and holiday/leisure. These both accounted for 43% of all overnight visitors.

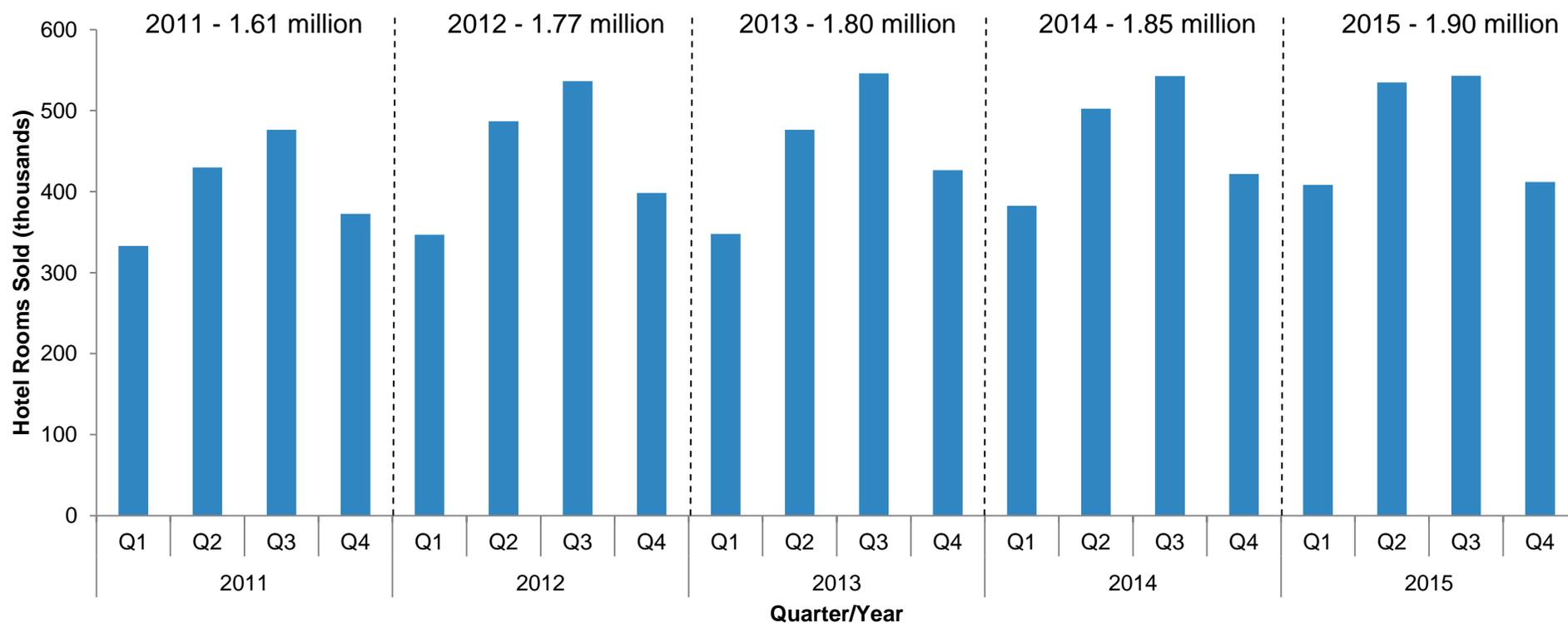
Figure 5: Reason for Overnight Trip, 2015 – all overnight trips



Hotel room-nights and other commercial accommodation

Alongside passenger and household surveys, NISRA conducts a monthly occupancy survey of local hotels and commercial accommodation (e.g. bed & breakfasts, guest houses and guest accommodation). Figures for 2015 show the total number of hotel room nights sold was 1.90 million, a 3% increase from the 1.85 million room nights sold in 2014 – see Figure 6 for the quarterly trend which shows the seasonality in this market.

Figure 6: Hotel room nights sold (Q1 2011- Q4 2015)



In 2015, average room occupancy in hotels was 67%, an increase of 2 percentage points from 2014. Average room occupancy for Guesthouses and Bed & Breakfasts in the same period was an estimated 27%. The annual self catering unit occupancy for 2015 was 36%, an increase of 3 percentage points on 2014.

Full information on Northern Ireland accommodation occupancy can be found at the following link: [NI Occupancy Surveys](#)

Full information on self catering accommodation in Ni can be found at the following link: [NI Self Catering Survey](#)

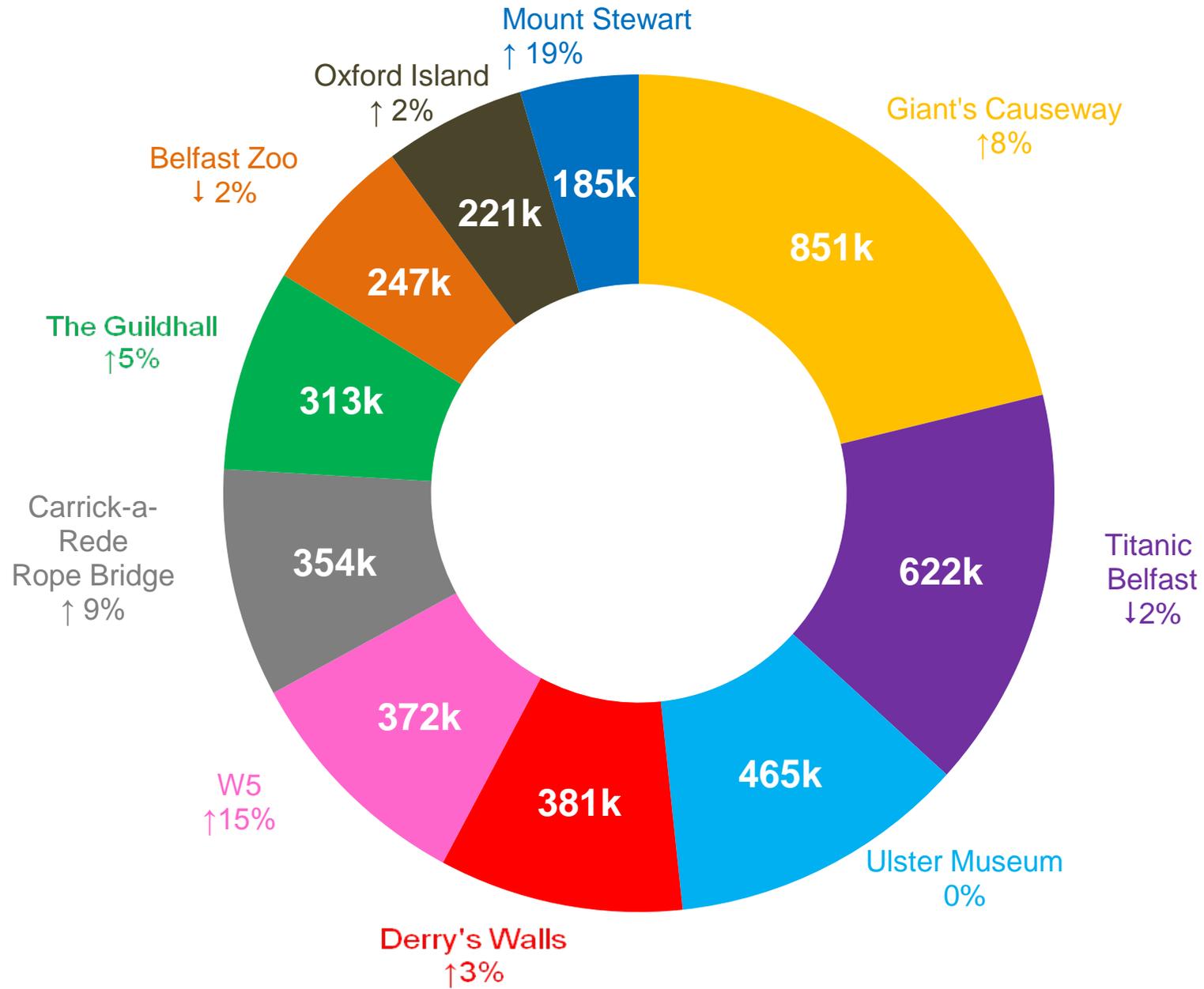
Visitor Attractions

To provide a further picture of tourism demand NISRA run an annual survey of all Visitor Attractions in Northern Ireland. Just over 400 attractions were surveyed at the end of December 2015. The results show that:

- there were 17.5 million visits made to visitor attractions during 2015;
- comparing attractions that returned data for both 2014 and 2015, showed that there was no change in demand between 2014 and 2015;
- excluding country parks, the Giant's Causeway World Heritage Site attracted the highest number of visitors with 851,000 visitors during 2015. This was an 8% increase in the number of visitors when compared to 2014; and
- Titanic Belfast attracted the second highest number of visitors (622,000 visitors), showing a 2% decrease in the number of visitors when compared to 2014.

Figure 7 overleaf shows the results for the ten most popular visitor attractions in 2015 (excluding country parks). The figures show the relative importance of the two headline attractions in Northern Ireland.

Figure 7: Top Ten Visitor Attractions 2015 (excluding country parks/parks/forests/gardens)



*Arrow indicates increase/decrease between 2014 - 2015

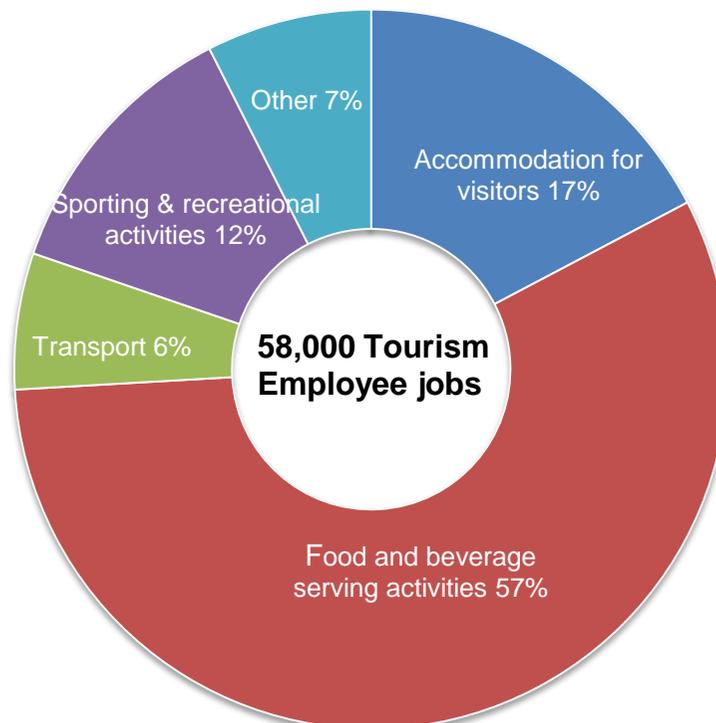
Cruise Ships Docking in Northern Ireland Ports

The number of cruise ships docking in Northern Ireland has increased markedly over time. In 2011, 32 cruise ships docked in Northern Ireland with up to 58,000 passengers and crew onboard. In 2015, there were over twice the number of ships (67) and passengers/crew (up to 123,000). Of these ships, 58 docked in Belfast, 6 in Londonderry and 3 in Bangor. Although there is no data available on the number of passengers or crew who disembark, or their associated expenditure, total capacity has doubled. (see [background](#) note 11 for further information).

Jobs in Tourism Related Industries

The most recent NI Census of Employment figures indicated a 3% increase in employee jobs in tourism related industries between 2011 and 2013. This increase was mainly in 'accommodation for visitors' and 'food and beverage serving' industries. Around one in ten of all employee jobs are in tourism related industries. A breakdown of these 58,000 jobs is given in Figure 8.

Figure 8: Employee Jobs in Tourism Related Industries, 2013

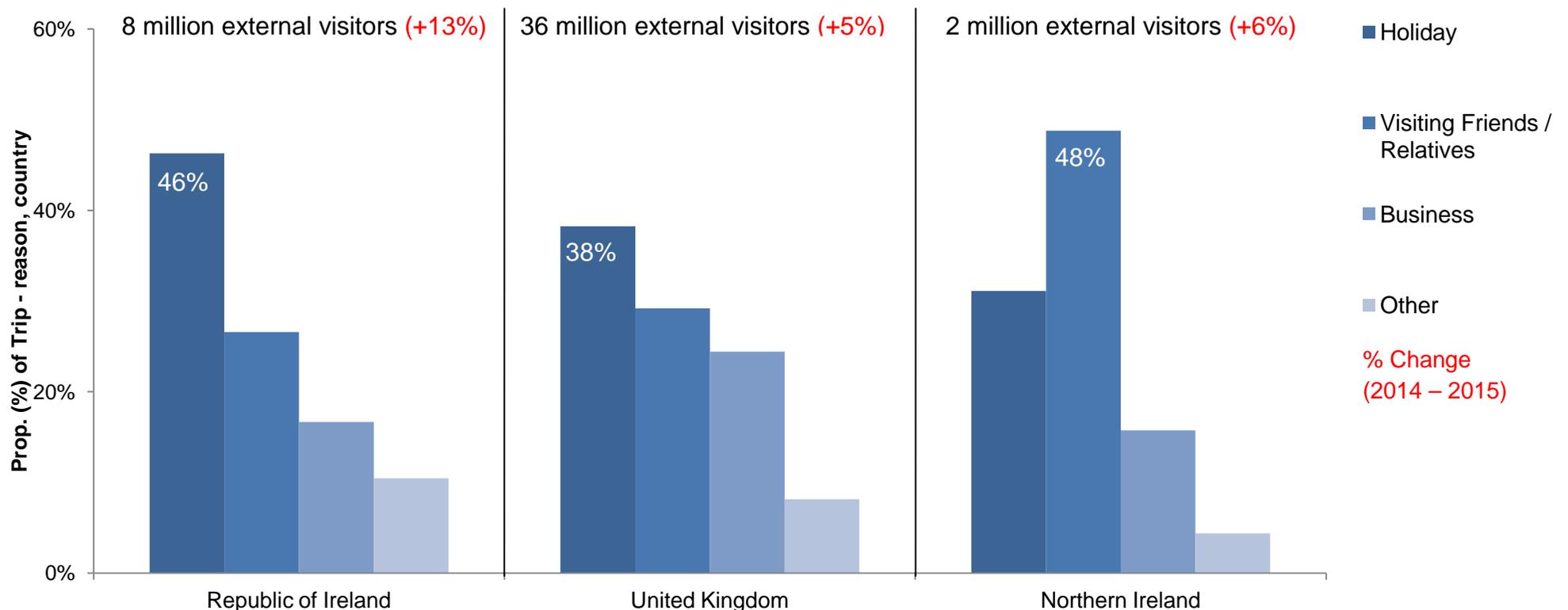


Comparisons

According to the latest UNWTO World Tourism Barometer, international tourist arrivals across the globe grew by 4.4% in 2015 to reach a total of 1.184 billion in 2015. Europe (+5%) led growth in absolute and relative terms supported by a weaker euro. Asia and the Pacific and the Americas also grew by 5% and the Middle East by 3%. Limited available data for Africa pointed to a 3% decrease in international arrivals.

It is informative when assessing tourism to compare Northern Ireland to the United Kingdom as a whole and the Republic of Ireland. Figure 9 shows the proportion of external overnight trips in 2015 by country and reason for visit. Between 2014 and 2015, external visitors to NI increased by 6%, similar to the UK (+5%). However a larger increase occurred for the RoI (+13%).

Figure 9 Proportion of external overnight trips by reason in UK, Republic of Ireland and Northern Ireland, 2015



Background Notes

1. This report presents a summary of tourism statistics. More detailed data are available at this [link](#). The next tourism statistics release will be in July for the year ending March 2015. These results will be made available online in a tabular format only.
2. Tourism data is derived from a variety of sources, more information on these sources can also be found at this [link](#). Tourism estimates are designed to provide timely data on tourism activity in Northern Ireland. The estimates may be subject to revision due to improvements to the survey/analysis methodology or the inclusion of data returned after the publication date. The figures in this document are the most up-to-date available at the time of publication. Northern Ireland Tourism statistics have undergone a series of organisational changes and revisions to methodology. Information on the sources, the data quality of each source and any revisions or changes in methodology can be accessed at this [link](#).
3. The production of tourism statistics is conducted in line with the UK Statistics Authority [Code of Practice for Official Statistics](#). This means that the statistics
 - a. meet identified user needs,
 - b. are well explained and readily accessible,
 - c. are produced according to sound methods, and
 - d. are managed impartially and objectively in the public interest
4. The measures reported in this report are the primary means of monitoring progress towards 2011-15 Programme for Government (PfG) targets related to tourism. The DETI Corporate Plan shows the target is to increase tourism revenue to £800m and visitor numbers to 4.4m in 2015. These results indicate that the target on visitor numbers has been met, while the tourism revenue target was not fully met. The strength of the pound in 2015 will have influenced tourism expenditure. A strong pound acts (i) to decrease the spend of external visitors and (ii) to decrease domestic tourist demand as local residents will find holidaying overseas more attractive.
5. NISRA uses the Survey of Overseas Travellers run by Fáilte Ireland to gain information on the visitors who took overnight trips in Northern Ireland and exited through Republic of Ireland ports. Information on Northern Ireland overnight trips is also now collected through a separate survey carried out by Central Statistics Office Ireland. NISRA researched the two sources and presented and agreed the findings at the all Ireland tourism statistics meeting with all relevant providers and users of the data. The findings can be accessed at [link](#).

6. Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on overnight trips in Northern Ireland residents aged under 16 are excluded. NISRA is in the process of changing the methodology of data collection to capture this information from April 2015. NISRA will explore the impact and will update users and include this group in the future. Users can see this on the Tourism Statistics Plan at this [link](#).
7. While the statistics are produced in as timely a way as possible, it is realised that early indicators would be useful. Early tourism indicators are published at this [link](#) and are updated monthly.
8. Tourism statistics systems are designed to collect information for Northern Ireland as a whole. However, respondents do indicate where they stay during these overnight trips allowing for some analysis at Local Area level. The most recent 2014 results published at this level can be found at this [link](#) and a data visualisation tool is available at this [link](#). The 2015 Local Government results will be published in July 2016.
9. The estimates in this bulletin are derived from sample surveys and are therefore subject to sampling errors. Sampling errors are determined both by the sample design and by the sample size. Generally speaking, the larger the sample supporting a particular estimate, the smaller the associated sampling error. Confidence intervals around the estimates of all overnight trips in Northern Ireland stands at +/- 7% for the year (associated expenditure at +/- 11%). Note: based on the survey design confidence intervals for domestic tourism trips stands at +/-10% and external trips at +/-5%. Information on confidence intervals in Northern Ireland tourism statistics can be accessed at this [link](#).
10. This report includes estimates from Census of Employment on the number of jobs in 'tourism characteristic industries'. The latest tourism characteristic industries breakdown available is for 2013 as the Census of Employment is carried out every two years. More information on the Census of Employment, the timing of the release of 2015 data and the associated methodology can be accessed at this [link](#).
11. The vast majority of cruise ships visit Northern Ireland on a single day basis, docking in the morning and then leaving in the evening. Thus under UN definitions cruise ship visits are considered day-trips and excluded from the overnight trips figures outlined in section 1. To address this statistics from [Visit Belfast](#), [Cruise North West](#) and Newry & Mourne Council relating to Warrenpoint port are included. Cruise ships can also drop anchor and tender passengers ashore at other parts of Northern Ireland (Bangor & Portrush).

12. NISRA has also started to use the Continuous Household Survey to measure the number of trips Northern Ireland residents take outside Northern Ireland. These statistics are not presented in detail in this report but they do give some context. As noted in Table 1 the number of domestic overnight trips (that is Northern Ireland residents spending a night away from their home within NI) fell by 4% over the period 2014-15. However, there was an equivalent increase of 3% in the number of trips taken by Northern Ireland residents overseas. This indicates that last year more Northern Ireland residents took advantage of the strong pound and the increasing number of flights to holiday overseas.

13. This report was revised on 12th August 2016 due to a revised weighting mechanism for the Household Travel Survey, conducted by Central Statistics Office regarding overnight visitors to Northern Ireland from the Republic of Ireland. More information can be found at this [link](#).

The impact of this revision on the estimates for overall trips, nights and spend to NI was less than 1%. When looking at external overnight trips to NI, the biggest differences were in estimates of expenditure in 2013 and 2014 (1.3%). As per the [Tourism Statistics Branch Revisions Policy](#), TSB have published more information on the minor impact to tourism statistics at this link [\(impact of HTS methodological change August 2016\)](#). The change in methodology has been discussed at all-island Tourism Statistics groups and NISRA have followed up with key users following this to discuss implications, however the impact is small.

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

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