

DELIVERING OUR COMMUNITY PLAN

TOURISM INDICATOR BASELINE



Tourism Economy

Long-term outcome: Our borough is the destination of choice for international¹ visitors.

One indicator is being used to monitor progress towards the tourism economy long-term outcome for the borough:

- Number of overnight trips made by visitors from outside Northern Ireland

Data source: [Tourism Statistics, Northern Ireland Statistics and Research Agency](#).

This indicator feeds into and is linked to the draft Programme for Government (as of October 2016) indicator of total spend by external visitors.

Indicator: Number of overnight trips made by visitors from outside Northern Ireland.

In 2016 there was an estimated 118,200 overnight trips made by visitors from outside Northern Ireland to the borough, or 4% of all external visitor to Northern Ireland. Associated with these trips to the borough were an estimated 684,100 nights and £24m expenditure.

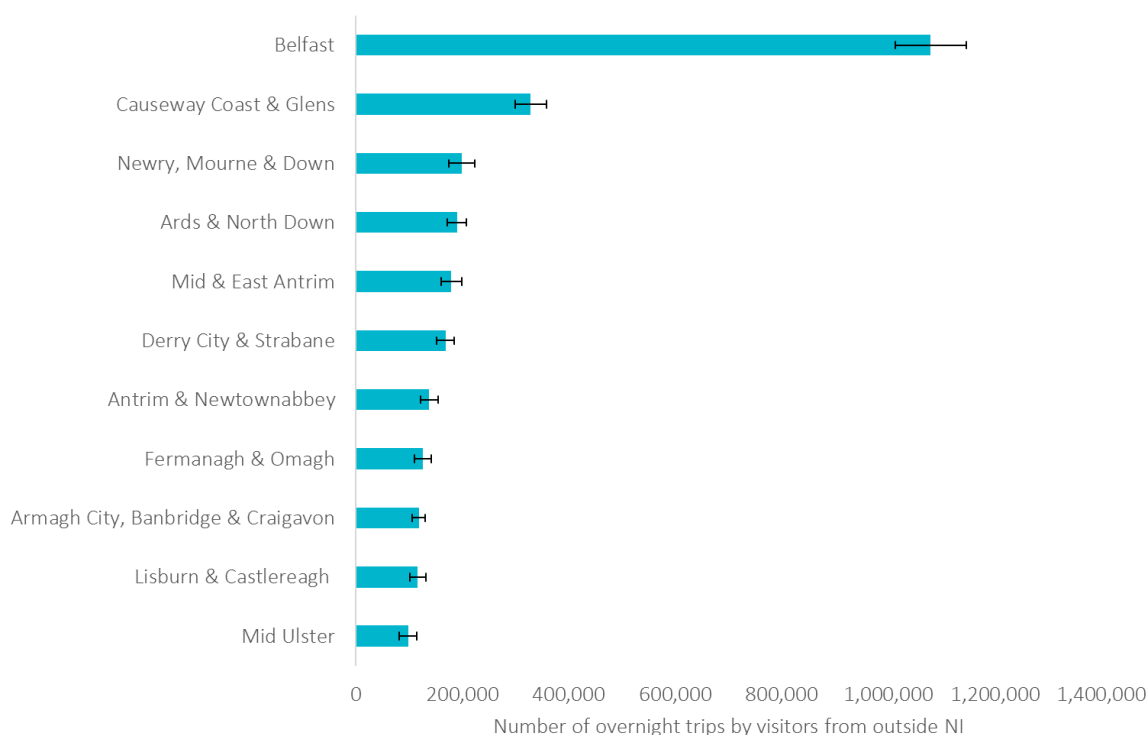


Figure 1. Estimated overnight trips made by visitors from outside Northern Ireland, 2016. Source: Tourism Statistics, NISRA. Note – The estimates on visitor numbers are derived from sample surveys, confidence intervals around the estimates are shown. See ‘notes on indicator data’ section below.

¹ Outside Northern Ireland

Local Government District	Overnight Trips		Nights		Expenditure	
	Number	% of NI	Number	% of NI	£	% of NI
Antrim & Newtownabbey	137,693	5%	567,019	5%	29,680,232	5%
Ards & North Down	189,844	7%	953,377	8%	36,995,646	6%
Armagh City, Banbridge & Craigavon	118,221	4%	684,053	6%	24,194,240	4%
Belfast	1,079,727	39%	3,925,762	35%	279,286,841	46%
Causeway Coast & Glens	328,676	12%	1,434,517	13%	73,038,971	12%
Derry City & Strabane	168,428	6%	735,404	6%	36,505,253	6%
Fermanagh & Omagh	125,684	5%	521,522	5%	25,061,925	4%
Lisburn & Castlereagh	116,481	4%	504,535	4%	23,237,855	4%
Mid East Antrim	179,330	7%	737,090	6%	34,434,155	6%
Mid Ulster	98,139	4%	509,416	4%	20,058,391	3%
Newry, Mourne & Down	198,627	7%	792,928	7%	31,059,446	5%
All LGDs*	2,740,850	100%	11,365,623	100%	613,552,954	100%

Table 1. Estimated overnight trips, nights and expenditure made by visitors from outside Northern Ireland, 2016. Source: Tourism Statistics, NISRA. Note – the estimates are derived from sample surveys, see ‘notes on indicator data’ section below. * The All LGDs figure (2.7 million) is higher than the Northern Ireland total (2.6 million) as someone may spend time in various locations during the one overnight trip to NI.

The number of overnight trips by external visitors to the borough has varied over the last six years. At a Northern Ireland level, there has been a statistically significant increase in the number of overnight trips from 2.3 million in 2015 to 2.6 million in 2016. The longer term trend suggests there has been a steady increase in the number of external overnight trips to Northern Ireland from 2011.

	Overnight Trips		Nights		Expenditure	
	Number	Percentage of NI	Number	Percentage of NI	£	Percentage of NI
2011	110,437	5%	521,401	5%	18,886,235	4%
2012	87,991	4%	395,821	4%	13,258,393	3%
2013	108,945	5%	626,395	6%	19,044,714	4%
2014	120,327	5%	601,568	6%	22,434,299	4%
2015	104,819	4%	516,959	5%	19,074,714	4%
2016	118,221	4%	684,053	6%	24,194,240	4%

Table 2. Estimated overnight trips, nights and expenditure in Armagh City, Banbridge and Craigavon Borough made by visitors from outside Northern Ireland, 2011-2016. Source: Tourism Statistics, NISRA. Note – the estimates are derived from sample surveys, see ‘notes on indicator data’ section below.

Notes on indicator data

To determine the total number of external visitors, data is compiled by NISRA from 3 surveys:

1. The Northern Ireland Passenger Survey (NIPS). This is a survey of passengers at air and sea ports in Northern Ireland conducted by NISRA. It is used to determine the number of visitors using these ports who have had overnight stays in Northern Ireland.

2. The Survey of Overseas Travellers (SOT). This is a survey of passengers at air and sea ports in the Republic of Ireland and is conducted on behalf of Fáilte Ireland. It is used to determine the number of visitors using these ports who have had overnight stays in Northern Ireland.
3. The Household Travel Survey (HTS). This survey is carried out by Central Statistics Office (CSO) to gather information on Republic of Ireland residents who overnight in Northern Ireland.

The sample surveys capture information from a subset of the population in order to estimate the headline statistics of overnight trips as well as other informative statistics of the whole population. The results from sample surveys are always estimates and not precise figures. This means that they are subject to margins of error which can have an impact on how the estimates should be interpreted, especially regarding comparisons over the short term or where differences between estimates are small.

Information supplied from SOT and HTS does not contain breakdowns by Local Government District (LGD). NISRA currently uses the Northern Ireland Passenger Survey to apportion the Survey of Overseas Travellers by LGD. Similarly, it uses the Continuous Household Survey to apportion the Household Travel Survey. Therefore the estimates (and associated confidence intervals) are subject to a number of assumptions so should be treated with additional caution.

As the confidence intervals are quite wide for most of the LGD figures, many short term changes would not be seen as statistically significant. Estimates should not be compared over short periods of time, but rather be looked at over longer periods. These estimates should also be considered alongside other indicators, where available, to give a fuller picture of tourism with each LGD.

Information on confidence intervals is not available prior to 2016 as the methodology was only created for 2016 estimates. However, they will be available for future years.

Local Government District	External Overnight Trips	95% confidence limit		95% confidence interval	
		Lower	Upper	Lower	Upper
Antrim & Newtownabbey	137,693	120,996	154,391	-12.1%	12.1%
Ards & North Down	189,844	171,456	208,232	-9.7%	9.7%
Armagh City, Banbridge & Craigavon	118,221	105,466	130,976	-10.8%	10.8%
Belfast	1,079,727	1,012,911	1,146,543	-6.2%	6.2%
Causeway Coast & Glens	328,676	298,828	358,524	-9.1%	9.1%
Derry City & Strabane	168,428	152,052	184,803	-9.7%	9.7%
Fermanagh & Omagh	125,684	110,040	141,329	-12.4%	12.4%
Lisburn & Castlereagh	116,481	101,641	131,321	-12.7%	12.7%
Mid & East Antrim	179,330	159,719	198,941	-10.9%	10.9%
Mid Ulster	98,139	81,642	114,635	-16.8%	16.8%
Newry, Mourne & Down	198,627	174,398	222,856	-12.2%	12.2%

Table 3. External overnight trips by Local Government District, 2016 with upper and lower confidence limits. Source: Tourism Statistics, NISRA.

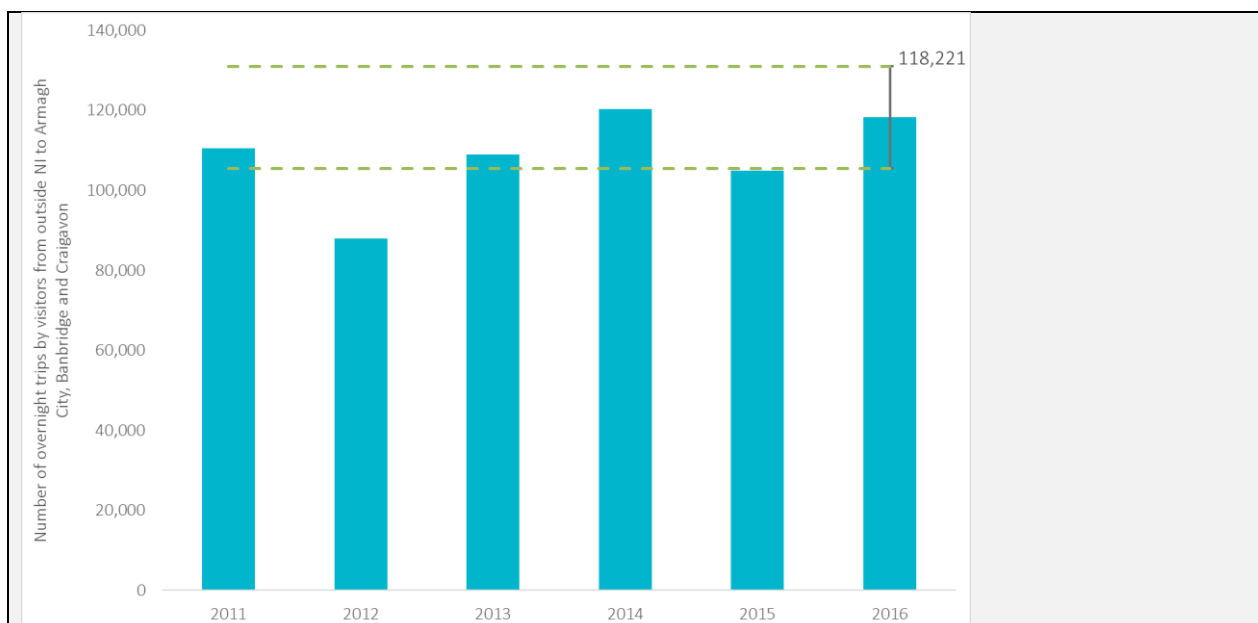


Figure 2. Number of overnight trips in Armagh City, Banbridge and Craigavon Borough made by visitors from outside Northern Ireland, 2011-2016. Source: Tourism Statistics, NISRA. Note – The estimates on visitor numbers are derived from sample surveys, the confidence interval around the 2016 estimate is shown. See 'notes on indicator data' section below.

Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on Northern Ireland residents aged under 16 are excluded.

Profile of External Visitors

Origin of Visitors

During the three year period 2014-2016, 61% of external visitors to the borough were from Great Britain. This is similar to the profile of external visitors to Northern Ireland overall in 2016, where 54% of overnight trips were from Great Britain, followed by 18% from Republic of Ireland.

The survey estimates suggest that the top five places of origin for external visitors to Northern Ireland in 2016 were England, Republic of Ireland, Scotland, United States of America and Germany.

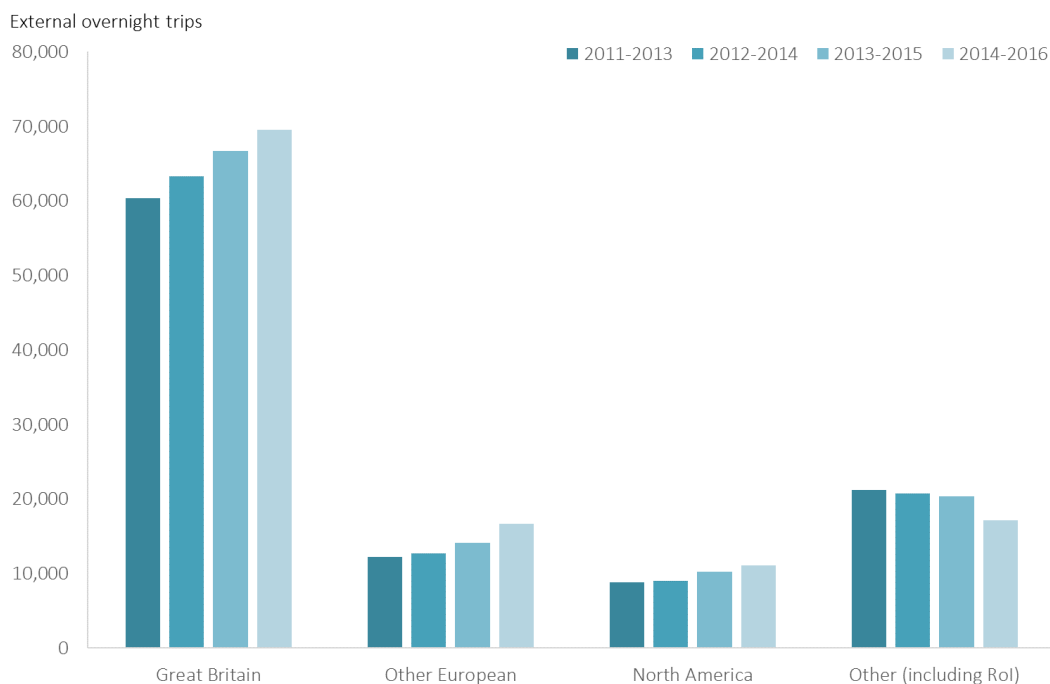


Figure 3. Estimated average overnight trips in Armagh City, Banbridge and Craigavon Borough by place of origin, 3-year average, 2011-2013 to 2014-2016. Source: Tourism Statistics, NISRA.

Overnight trips to Armagh City, Banbridge & Craigavon	Place of Origin				
	Great Britain	Other European	North America	Other (including Rol)	All
2011-2013	60,306	12,179	8,792	21,181	102,458
2012-2014	63,322	12,716	9,040	20,676	105,754
2013-2015	66,644	14,099	10,249	20,372	111,364
2014-2016	69,539	16,697	11,051	17,168	114,456
2014-2016 percentage	61%	15%	10%	15%	100%

Table 4. Estimated average overnight trips in Armagh City, Banbridge and Craigavon Borough by place of origin, 3-year average, 2011-2013 to 2014-2016. Source: Tourism Statistics, NISRA. Note- Estimates based on a sample size of 51-100 are shaded.

	2011	2012	2013	2014	2015	2016	% of 2016
<i>Great Britain</i>	1,052,227	1,034,439	1,165,002	1,174,608	1,295,419	1,389,411	54%
<i>Republic of Ireland</i>	370,310	452,716	396,359	389,757	336,383	455,972	18%
<i>Mainland Europe</i>	253,310	252,962	242,947	264,933	310,666	358,383	14%
<i>North America</i>	161,010	163,572	165,188	227,322	229,122	249,962	10%
<i>Other overseas</i>	94,769	102,746	119,774	121,899	129,813	134,821	5%
Northern Ireland	1,931,626	2,006,436	2,089,271	2,178,520	2,301,402	2,588,548	100%

Table 5. Number of external overnight trips to Northern Ireland by place of origin, 2011-2016. Source: Tourism Statistics, NISRA.

Reason for Visit

Of all estimated overnight trips to Northern Ireland in 2016, half (50%) were to visit friends and relatives. A third (33%) came to NI for holiday / pleasure / leisure purposes. Some 13% came to NI for business purposes, and 4% for other reasons. These proportions have remained relatively unchanged between 2011 and 2016. Reason for visit is only available for all visitors at Local Government District level.

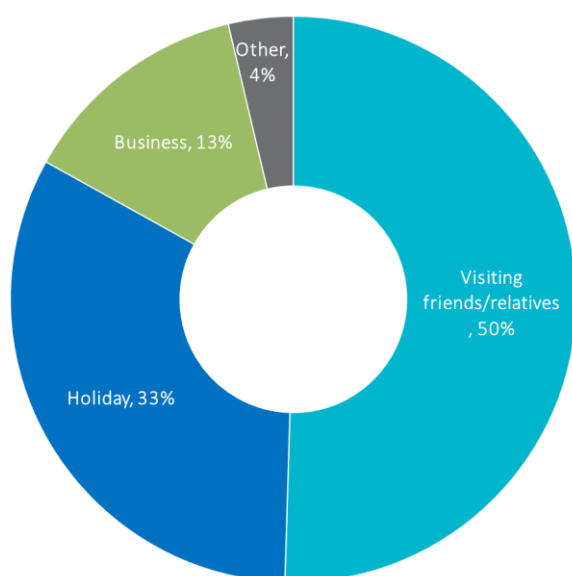


Figure 4. Reason for overnight trip, external overnight trips to Northern Ireland, 2016. Source: NISRA.

Accommodation Type used for External Overnight Trips in Northern Ireland

Of all external overnight trips to NI during 2016, staying with friends and relatives was the most popular choice of accommodation type. The second most popular accommodation type used was hotels, with 24% of total nights being spent in a hotel.

	Hotel	Guesthouse and B&B	Caravan & Camping	Rented	Staying with friends / relatives	Other	Total
Great Britain	22%	4%	2%	5%	63%	5%	100%
Republic of Ireland	29%	5%	7%	9%	49%	2%	100%
Other Europe	21%	10%	4%	9%	35%	22%	100%
North America	36%	5%	0%	9%	39%	11%	100%
Other Overseas	20%	9%	0%	8%	51%	12%	100%
Total External Visitors	24%	6%	2%	7%	52%	9%	100%

Table 6. Proportion of nights of external overnight trips to Northern Ireland by place of origin and accommodation type 2016. Source: Tourism Statistics, NISRA.

Accommodation

The supply of accommodation in the Borough is one of the lowest of the 11 council areas in NI. In 2016, there were 507 rooms available in the Borough, the second lowest in NI with 206 of these being in hotels, the lowest number in NI.

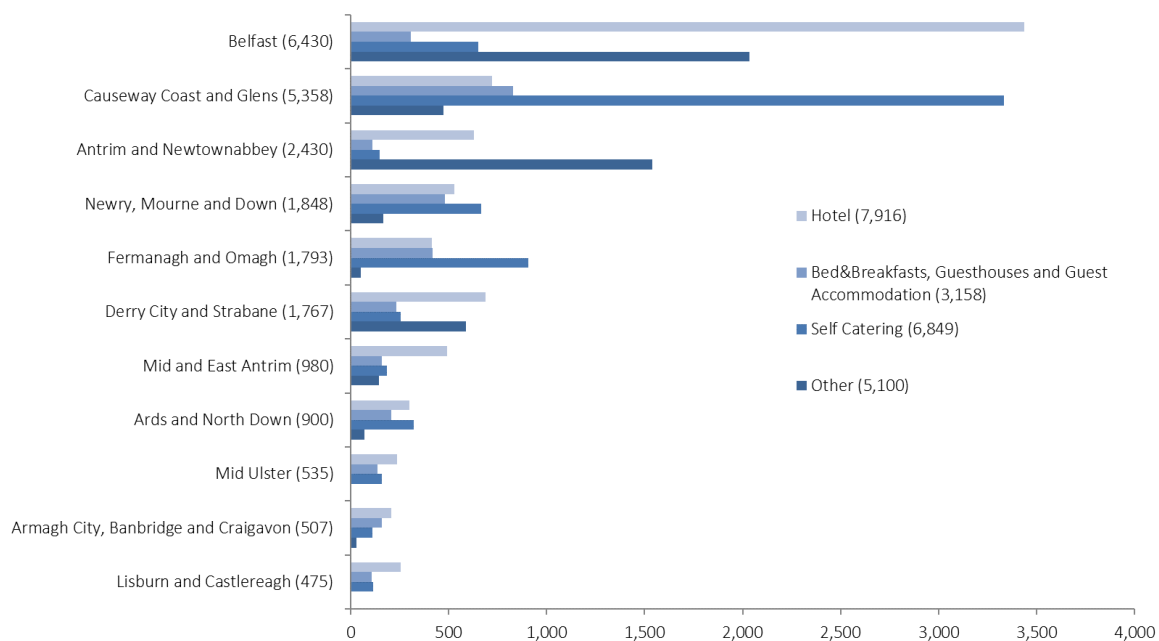


Figure 5. Number of rooms available in licensed accommodation by type and Local Government District, 2016. Source: Tourism Statistics, NISRA.

Whilst there are some excellent examples of high quality five star Guesthouse and Self-catering accommodation, overall the majority of rooms are in 3 star or ungraded accommodation.

	Hotels		Guest House, B&B and Guest Accommodation		Self-catering		Hostels	
	Number	Rooms	Number	Rooms	Number	Units	Number	Rooms
5 star	-	-	2	9	1	1	-	-
4 star	-	-	-	-	7	14	1	18
3 star	3	112	1	5	5	9	-	-
2 star	2	49	-	-	-	-	-	-
1 star	-	-	-	-	-	-	-	-
Ungraded	1	36	41	154	16	18	1	13
Awaiting grading	1	9	-	-	1	5	-	-
Total	7	206	44	168	30	47	2	31

Table 7. Visitor accommodation stock in Armagh City, Banbridge and Craigavon Borough as of 9th May 2017. Source: Tourism NI.

Occupancy

Hotel room occupancy in the borough was 52% in 2016, compared to 70% for NI overall. Belfast had the highest room occupancy during 2016 (79%), followed by Mid & East Antrim (67%) and Derry City & Strabane (65%). There were an estimated 2.02 million rooms sold in Northern Ireland hotels during 2016. Estimates suggest 2016 saw the highest hotel occupancy rates of any year from 2011 onwards.

	% hotel room occupancy 2016
Antrim & Newtownabbey	64%
Ards & North Down	61%
Armagh City, Banbridge & Craigavon	52%
Belfast City	79%
Causeway Coast & Glens	64%
Derry City & Strabane	65%
Fermanagh & Omagh	63%
Lisburn & Castlereagh	*
Mid & East Antrim	67%
Mid Ulster	54%
Newry, Mourne & Down	62%
Northern Ireland	70%

Table 8. Hotel room occupancy by Local Government District, 2016. Source: NISRA. * sample size too small to provide a reliable estimate.

Visitor Attractions

During 2016, the top visitor attractions in Northern Ireland in terms of visitor numbers were the Giant's Causeway (0.94 million visits), Titanic Belfast (0.67 million), the Ulster Museum Belfast (0.46 million) and Carrick-a-Rede Rope Bridge (0.44 million).

Armagh City, Banbridge and Craigavon Borough has a wide variety of attractions. In 2016 the top five visitor attractions/parks in terms of visitor numbers were Lurgan Park (633,863), Oxford Island National Nature Reserve (224,940 visits), Kinnego Marina (205,293) Tannaghmore Gardens & Rare Breeds Animal Farm (123,806) and Lough Neagh Discovery Centre (122,029). These top attractions are all free to visit.

Visitor Attraction	2011	2012	2013	2014	2015	2016
Armagh County Museum	12,851	13,099	9,452	10,001	11,147	10,247
Armagh Observatory	42,006	42,491	11,000	40,151	44,805	44,251
Armagh Public Library	4,403	6,094	7,086	7,713	7,959	8,276
Armagh Roman Catholic Cathedral	9,000	9,000	—	—	60,000	60,000
Bronte Interpretive Centre	565	—	—	—	401	341
Brownlow House	—	—	—	—	15,000	18,000
Cardinal Tomas Ó Fiaich Memorial Library And Archive	—	—	10,972	—	5,280	12,467
Coney Island	—	—	2,006	2,000	2,000	4,000
Dan Winter's House	3,530	3,197	3,925	4,160	3,437	3,209
FE McWilliam Gallery/Studio (inc TIC)	43,069	50,466	—	—	42,498	41,405
Kinnego Marina	343,927	158,448	325,906	209,359	209,207	205,293
Lough Neagh Discovery Centre	93,105	—	133,004	131,559	133,437	122,029
Lurgan Park	750,000	487,859	770,156	784,292	—	633,863
Milford House Collection	900	1,200	1,500	1,200	2,000	798
Millenium Court Arts Centre	12,072	15,302	16,552	16,602	19,443	19,286
No 5 Vicars Hill	3,755	3,892	3,755	3,962	3,582	4,149
Oxford Island National Nature Reserve	319,079	296,606	314,020	217,353	220,928	224,940
Peatlands Park	95,000	100,000	90,000	95,000	126,123	102,436
Portmore Lough & Nature Reserve	4,560	4,500	12,000	12,000	12,000	13,253
Royal Irish Fusiliers Museum	10,218	10,847	11,269	12,630	11,286	12,254
Sloan's House Museum of Orange Heritage	—	—	—	—	—	5,533
St. Patricks Cathedral	35,190	35,822	36,270	68,939	—	87,285
Tannaghmore Gardens & Rare Breeds Animal Farm	85,000	—	30,686	109,207	124,876	123,806
The Navan Centre & Fort	45,000	45,200	50,803	49,362	44,016	45,192
Tommy Makem Arts & Community Centre	—	—	—	—	500	1,200
William McCrum Park - Home of the Penalty Kick	—	—	—	—	6,000	3,000

Table 9. Visitor attractions and their number of visitors in Armagh City, Banbridge and Craigavon Borough, 2011-2016. Source: Tourism Statistics, NISRA. Note- the figures presented are for both fee paying and non-fee paying attractions and parks.

Visitor attractions across Northern Ireland provide information to NISRA on the number of people who visit their attractions throughout the year. Counting methods for individual attractions differ and may also change year on year which may impact on these results. The list of visitor attractions above only includes those that choose to participate in the NISRA report and make their results public.

Visitor Experience

In order to understand our visitors better and to gain an insight into their needs, it is important to view the Northern Ireland visitor experience from the point of view of our visitors. Visitor attitude surveys on nine key tourism areas (known as Destinations) in Northern Ireland are available from Tourism NI, these can help gain an insight into the various elements of the visitor journey here - from trip planning to participating in leisure activities. Results for 2014 are available for two destinations in the Borough - Armagh and Lough Neagh and surrounding area. In the survey, visitors were asked to choose words to describe the destination.

Armagh, was seen as Friendly (66%), Memorable and Cultural (both 42%). Compared to all other regions, Lough Neagh was more likely to be seen as Relaxing (78%) and more likely than most other regions to be described as Fun (29%) and Familiar (21%).

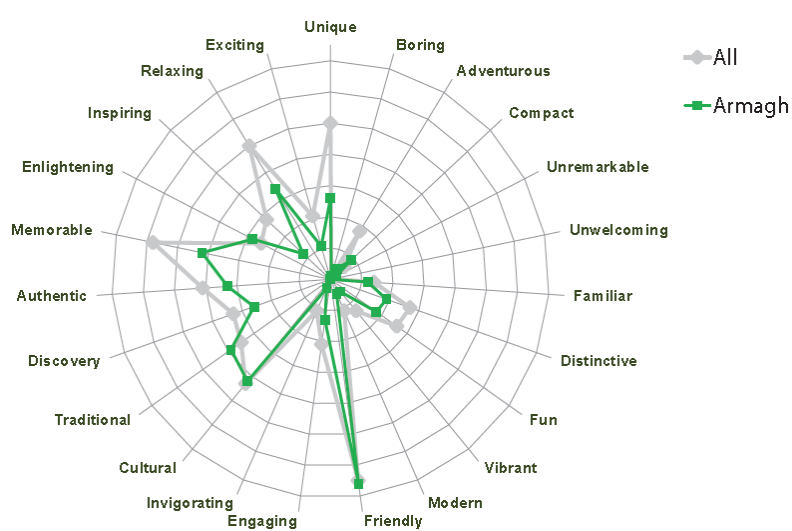


Figure 6. Armagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

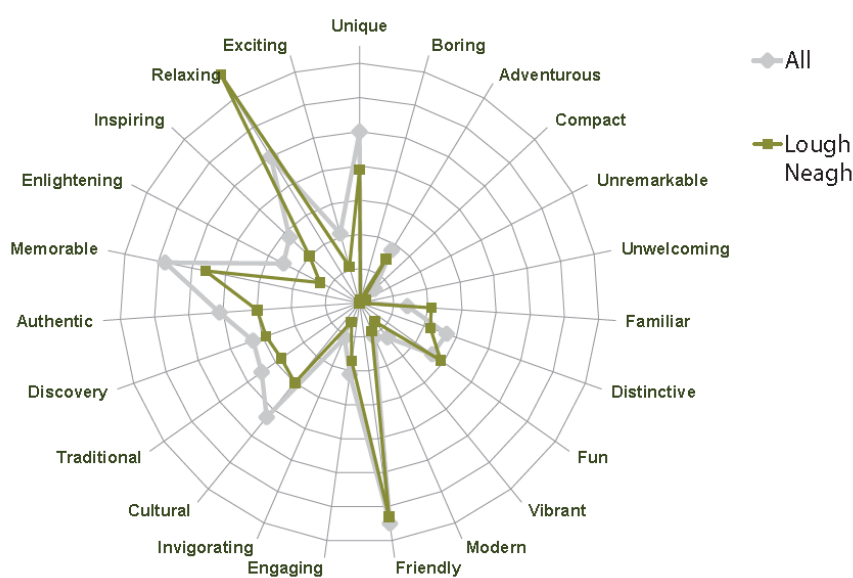


Figure 7. Lough Neagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

Employment in Tourism Related Industry

Employee jobs in tourism characteristic industries relate to a number of different business areas, most notably hotels and restaurants. In 2015, there were 70,100 employee jobs in Armagh City, Banbridge and Craigavon Borough, of which 4,300 or 6% were in tourism characteristic industries (the lowest proportion of the 11 council areas). Belfast had the largest number of employee jobs in tourism characteristic industries, but proportionally local employment in the tourism industry is higher in Ards and North Down (13%) and Causeway Coast and Glens (12%) LGDs.

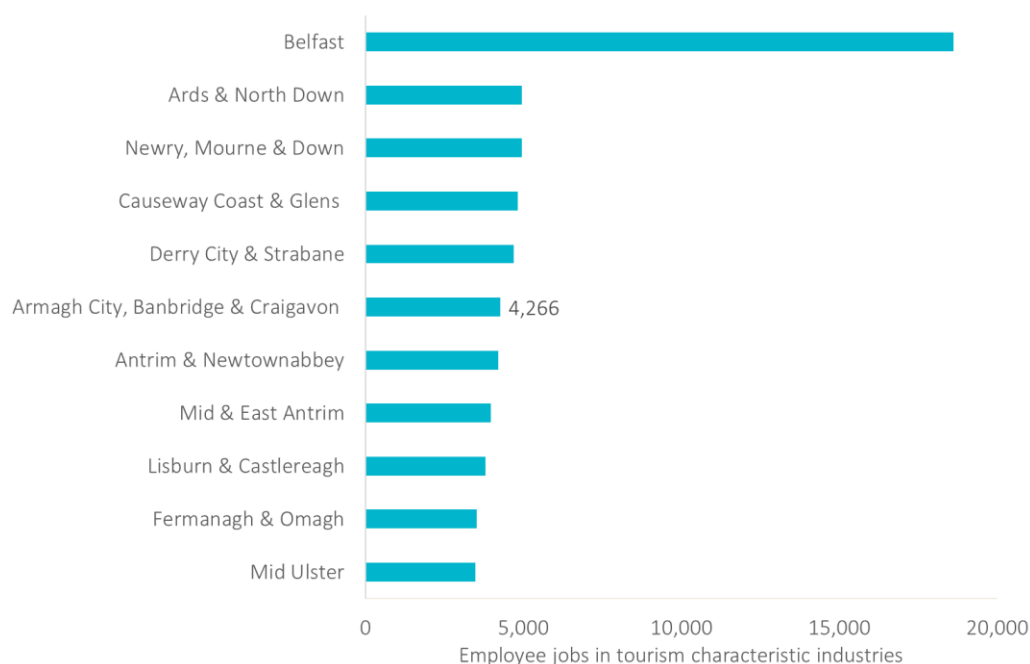


Figure 8. Employee jobs in tourism characteristic industries by Local Government District, 2015. Source: NISRA, Northern Ireland Local Government District Tourism Statistics 2016 and NI Census of Employment 2015.

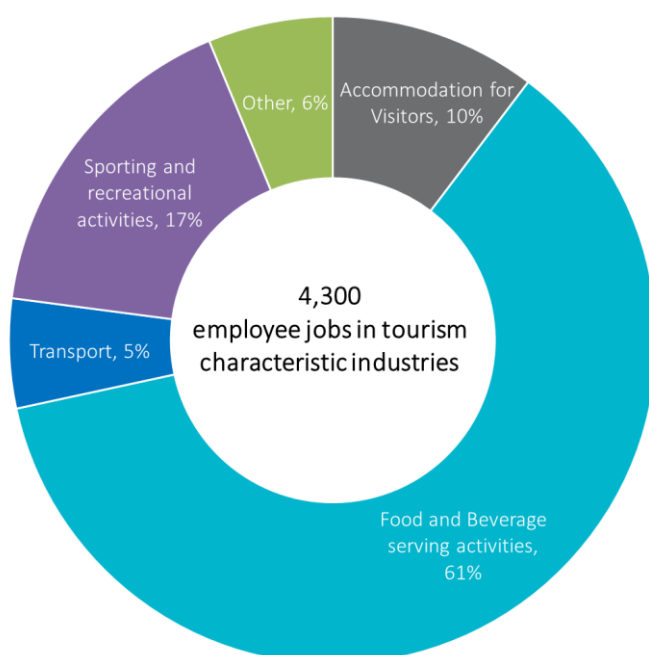


Figure 9. Employee jobs in tourism characteristic industries by type, Armagh City, Banbridge and Craigavon, 2015. Source: NISRA, Northern Ireland Local Government District Tourism Statistics 2016 and NI Census of Employment 2015.