

**SECTION 6e -
CRITICAL ECONOMY
SECTOR: TOURISM**

6e.1 Significance of Tourism Sector

Tourism is 'potentially' a very significant sector / contributor for the Regional economy, and indeed for cross-border activities. The sector involves domestic tourism and also international visitors - which is particularly important for the 'external money' that it can introduce to the economy of the Region.

The most important statistics are about the value of tourism - in terms of tourist numbers and their spend levels, for which there are ambitious forecasts / targets to increase significantly in the coming years. Other tourism statistics, which are produced for national and regional levels, includes number of jobs, source of visitors, their socio-economic profile, length of stay, type of accommodation, occupancy levels, purpose of visit, activities used, visitor attractions, attitudes / satisfaction, etc. However, much of the tourism data needs to be treated with caution - as many figures are estimates, based upon sample surveys and industry returns.

<http://www.nitb.com/ResearchIntelligence/EconomicandTourismEmploymentData.aspx> NI

Economic benefit of Tourism

<http://www.crossborder.ie/pubs/2012-economic-report.pdf> 2012 Bradley & Best Report includes cross-border tourism and the economy of the Border Region

6e.2 Tourism Organisations and Data Available

There are two primary **tourism organisations** - Fáilte Ireland and NI Tourist Board, whilst the whole island is jointly marketed overseas by Tourism Ireland. Information on the main organisations is available at:

<http://www.tourismireland.com/> Tourism Ireland (Corporate website for island)

<http://www.discoverireland.com/gb/> Tourism Ireland (Consumer website for island)

<http://www.failteireland.ie/> Fáilte Ireland (Corporate website for ROI)

<http://www.discoverireland.ie/> (Consumer website for ROI)

<http://www.nitb.com/Home.aspx> NITB (Corporate website for NI)

<http://www.discovernorthernireland.com/> NITB (Consumer website for NI)

<http://www.detini.gov.uk/deti-tourism-index.htm> NI Dept of Enterprise, Trade & Industry

These 'national' organisations provide annual and quarterly statistical reports on the performance - at a **national** level, and though there can be a time lag, they do provide a reasonable analysis. Certain national tourism figures (for Ireland and UK, and some for NUTS 2 Regions i.e. BMW and NI) are recorded across Europe:

<http://www.tourismireland.com/CMSPages/GetFile.aspx?guid=f800ac4c-05f0-4972-8479-e90afdec584> 2009 Facts & Figures, on Overseas Visitors, to all of island (2009 is most recent)

<http://www.failteireland.ie/Research-Insights/National-Statistics.aspx#searchtext=&>

<http://www.nitb.com/ResearchIntelligence.aspx>

http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/main_tables

The RoI has seven tourism Regions and, conveniently, the five RoI counties in the Central Border Region comprise the **North-West Region**. There are annual data reports for the Regions generally (on the numbers and revenue generation of overseas visitors, per Region of Origin) as well as a specific report for the North-West Region. Additionally, there is a report of the approximate allocations per **county** - which is useful in trying to estimate the overall ICBAN figures.

[http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/Regional_Estimates_2009-2011_\(p\).pdf?ext=.pdf](http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/Regional_Estimates_2009-2011_(p).pdf?ext=.pdf) RoI Regions 2011

http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/Tourism_Facts_North_West.pdf?ext=.pdf RoI N W Region 2010

http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/COUNTY_Numbers_Revenue_11P.pdf?ext=.pdf RoI counties 2011

The best source of data about RoI domestic tourist trips / revenue is produced annually by CSO, though these figures are given at national and NUTS 2 levels, not by county - and are therefore of limited use for calculating ICBAN data.

<http://www.cso.ie/en/media/csoie/releasespublications/documents/tourismtravel/2011/hotra2011.pdf>

There appears to be a reciprocal relationship between CSO and NISRA, through their respective Household Surveys, to supply data estimates on the number of visitors (overnight trips) to the other jurisdiction. However, such data is not available at a regional or county level and does not seem to be compatible / consistent e.g. on revenue generated, or between sources. Additionally, InterTrade Ireland has assembled the data on cross-border tourism flows.

<http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-roi-visitors.htm> CSO RoI-NI 2010 & 2011

http://www.detini.gov.uk/2011_domestic_revised.pdf Revised NI Tourism Estimates, page 4, NI-RoI

<http://www.intertradeireland.com/trade-statistics/> Click 'Tourism Flows' tab, NI-RoI & RoI-NI

Within NI, there are loose regions for marketing purposes but these are not really statistical entities e.g. Fermanagh, Sperrins, Lough Neagh. Whilst there are reports on the characteristics of visitors to these local areas, the main data for the council areas and hence for the Central Border Region is in the 'annual' Local Authority Tourism Estimates (including overseas, RoI residents & domestic tourists, though the latest available are for 2009, on a 3-year rolling period). Whilst Councils in NI have responsibility for local visitor / tourist information, they do not really provide tourism data.

6e.3 Visitor Numbers and Revenue

Commentary on Key Tourism Data

It can be seen that most of the tourism impact in the Central Border Region is in Donegal, Sligo, Cavan, Armagh City Banbridge and Craigavon Borough and in Fermanagh & Omagh District, though it is also an important sector for all of the other council areas. The numbers / spend is significant for the local economies and the Region is considered to have much additional potential - as it strives to become a major tourism destination which contributes to the amount of overall tourism on the island.

Table 47: Overnight Visitors to Central Border Region 2009 (NI = Overseas, Rol & Domestic, Rol = Overseas Only)

Area	Visitors 2009		Revenue 2009**		Visitors 2011		Revenue 2011	
	No. (000)	% of State (Rol/NI)	Amount (€ million)	% of State (Rol/NI)	No. (000)	% of State (Rol/NI)	Amount (€ million)	% of State (Rol/NI)
Cavan	74,000	1.1%	€32	0.9%	90,000	1.4%	€23	0.8%
Donegal	163,000	2.5%	€47	1.4%	205,000	3.2%	€51	1.7%
Leitrim	27,000	0.4%	€14	0.4%	31,000	0.5%	€11	0.4%
Monaghan	33,000	0.5%	€13	0.4%	48,000	0.8%	€13	0.4%
Sligo	143,000	2.2%	€45	1.3%	167,000	2.6%	€47	1.6%
Armagh City, Banbridge and Craigavon Borough	158,400	5.1%	€28.2	4.3%	222,200	5%	€36.2	4%
Mid Ulster District Council	105,100	3.4%	€20.3	3.1%	-	-	-	-
Fermanagh & Omagh District Council	177,100	7.6%	€58.6	9.0%	-	-	-	-
ICBAN Region*	860,600	NA	€258.1	N/A	-	-	-	-
Rep of Ireland	6,578,000	100%	€3,420	100%	6,326,000	100%	€2,971	100%
Northern Ireland	3,129,400	100%	€650	100%	10,565,600	100%		

Source: NITB Local Authority Tourism Estimates, 2007-2009 & Fáilte Ireland Overseas Visitors by Counties in 2011, FI Annual Report 2011

* It may not be very accurate to add the figures from Rol to NI - but it does give a best-estimate.

** Uses a conversion rate of 1Euro = 0.78 Sterling, as per Fáilte Ireland Facts & Figures 2009

http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/COUNTY_Numbers_Revenue_09.pdf?ext=.pdf Rol Counties 2009

http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/Overseas_Visitors_and_Revenue_by_County_2011.pdf?ext=.pdf Rol Counties 2011

www.nitb.com/FileHandler.ashx?id=1453 NITB Local Authority Tourism Estimates, 2007-2009

<http://www.failteireland.ie/Failteireland/files/fa/fa4f1c9f-40da-4bf5-90a1-a0cf9d90792a.pdf>

Fáilte Ireland Annual Report 2011, p18

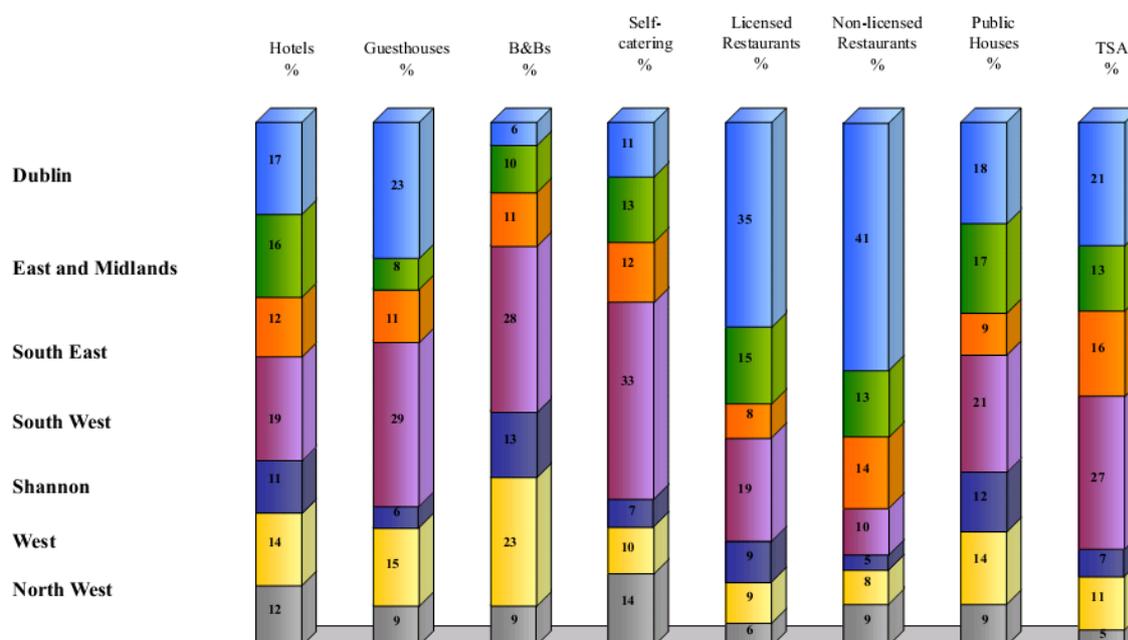
6e.4 Employment in Tourism

There is no definitive tourism data on the estimated number of jobs in each LGD, either in RoI or NI; hence no figures are possible for the Central Border Region, but a number of indicative sources are used.

Fáilte Ireland’s latest employment survey estimated a total tourism employment of 178,000, or approx. 10% of all jobs in RoI in 2010. The jobs are analysed into 8 categories of accommodation, restaurants, public houses and ‘tourism services and attractions’ (TSA). A total of **15,432 tourism jobs were estimated for the North West Region** (which consists of the 5 ICBAN counties), summarised below:



Table 6 – Regional Distribution of Tourism Employment by Sector



http://www.failteireland.ie/Failtelreland/media/WebsiteStructure/Documents/3_Research_Insights/3_General_SurveysReports/2010-Tourism-Employment-Survey.pdf?ext=.pdf RoI Employment 2010

The CSO Business Demography figures for NACE (Rev2) Sector I (Accommodation and Food Service Activities) provide the most useful employment figures that approximate to ‘tourism’, by county, for 2006 - 2010. Various types of data can be shown, including on tables and graphs. These figures show **11,856 persons employed in these five ICBAN counties, in 1,688 enterprises.**

[http://www.cso.ie/px/pxeirestat/Statire/SelectOut/PxSort.asp?file=201212122322143794BRA18&P Language=0&MainTable=BRA18&MainTablePretext=Employees \(Number\)&potsize=60](http://www.cso.ie/px/pxeirestat/Statire/SelectOut/PxSort.asp?file=201212122322143794BRA18&P Language=0&MainTable=BRA18&MainTablePretext=Employees (Number)&potsize=60)

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=BRA18&PLanguage=0>

In NI, it was estimated that ‘tourism and leisure’ accounted for approx. 54,000 employees or 8% of all jobs in NI in 2011. There is no LGD or regional breakdown of these figures - which cover six identified SIC employment Groups, as follows:

Table 17: Tourism and Leisure employee jobs, December 2010 and December 2011

Standard Industrial Classification (2007)	December 2010	December 2011	Difference %
Accommodation	9,540	9,410	-1%
Food and beverage service activities (excluding event catering and other food service activities)	29,560	29,480	-
Travel agency, tour operator and other reservation service and related activities	1,280	1,340	+5
Libraries, archives, museums and other cultural activities	2,220	2,460	+11
Gambling and betting activities	2,420	2,210	-9
Sports activities and amusement and recreation activities	8,470	9,170	+8
Total Tourism & Leisure	53,490	54,080	-1
Total Employee Jobs	697,520	699,020	-

Source: NI Quarterly Employment Survey

http://www.detini.gov.uk/2011_tourism_performance_estimates.pdf NI Employment 2010/11, p.12

The DETINI Inter-Departmental Business Register gives the UK SIC (2007) tables of Broad Industry Groups including ‘Accommodation and Food Services’; it gives the number of VAT / PAYE Enterprises per LGD (there are 565 enterprises in the 5 NI ICBAN LGDs in 2011) but it does not give the numbers employed in this Group per LGD.

http://www.detini.gov.uk/1._vat_and_paye_tables_2011.xls

6e.5 Tourism Assets / Visitor Attractions

The main assets of the Central Border Region include the coast / beaches, mountains, lakelands, waterways and various heritage sites. Additionally, numerous local-scale attractions, the Gaeltacht / other culture, the ‘activities’ sector, the ‘unspoiltness’ and a range of good accommodation all help to bring visitors and benefits to the Region. In terms of the official data, the main ‘visitor attractions’ of the Region (over 2,000 visitors p.a.) are shown in the table below:

Table 48: Main Visitor Attractions in Central Border Region 2011

Visitor Attraction	Council area	No. of Visitors 2011
Castle Archdale Country Park	Fermanagh & Omagh	180,000
Belleek Pottery	Fermanagh & Omagh	165,297
Ulster American Folk Park	Fermanagh & Omagh	138,418
Dungannon Park & Lake	Mid Ulster	125,000
Glenveagh National Park	Donegal	112,000
Peatlands Country Park	Mid Ulster	95,000
Lough Neagh Discovery Centre	Armagh, Banbridge and Craigavon Borough	93,105
St Patrick's Centre	Armagh, Banbridge and Craigavon Borough	89,483
Ards Forest Park	Donegal	60,000
Marble Arch Caves	Fermanagh & Omagh	55,519 (2009)
Waterworld, Bundoran	Donegal	50,345
Ionad Cois Locha	Donegal	46,000
Navan Centre, Armagh	Armagh, Banbridge and Craigavon Borough	45,000
Devenish Island	Fermanagh & Omagh	45,000
Armagh Observatory & Astropark	Armagh, Banbridge and Craigavon Borough	42,000
Glenveagh Castle	Donegal	41,161
Florencecourt House & Gardens	Fermanagh & Omagh	40,314
Donegal Castle	Donegal	36,678
Castle Coole	Fermanagh & Omagh	36,512 (2010)
Armagh Planetarium	Armagh, Banbridge and Craigavon Borough	35,700
Glebe House & Gallery	Donegal	24,321
An Creagan	Fermanagh & Omagh	26,450
Voya Seaweed Baths	Sligo	25,000
Carrowmore Megalithic Cemetery	Sligo	23,073
Tropical World	Donegal	20,000
Derrynoyd Forest	Mid Ulster	20,000

Source:

[http://www.failteireland.ie/FaillteIreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Visitors_to_Tourist_Attractions_2007-2011-\(Revised-Oct-2012\).pdf?ext=.pdf](http://www.failteireland.ie/FaillteIreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Visitors_to_Tourist_Attractions_2007-2011-(Revised-Oct-2012).pdf?ext=.pdf)

RoI Visitor Attractions 2007-11

http://www.detini.gov.uk/visitor_attraction_2011.pdf NI Visitor Attractions 2011, p13-16

http://www.failteireland.ie/FaillteIreland/media/WebsiteStructure/Documents/3_Research_Insights/2_Regional_SurveysReports/Tourism_Facts_North_West.pdf?ext=.pdf RoI North West, p10

<http://www.outdoorrecreationni.com/> Outdoor Activities in NI

6e.6 Tourist Accommodation

The amount and quality of tourism accommodation is important for the Region - to service the tourists' needs (and local market), maximise spend in the area and indeed also to attract visitors. The Region can offer top class hotels with leisure facilities and golf courses such as the two 5* hotels of the Lough Erne Resort or Solas Lough Eske, as well as

the whole range of other serviced and unserviced options down to hostels and caravan / camping sites (the latter category having a separate link below).

In terms of bed spaces, it can be seen that **Donegal, County Fermanagh (as part of Fermanagh & Omagh District Council), Sligo and Cavan** dominate the accommodation sector; these counties have a lot of hotels in particular, whilst Donegal and County Fermanagh have by far the most self-catering units. Conversely, the **inland counties of NI have a less extensive accommodation offering**. In terms of the ‘flagship’ hotels sector, the Region has just two 5* establishments, though it does have 94 fine 4* and 3* hotels, as well as an above average number of lower grade hotels. Data is also available for the occupancy rates of the sectors, and further details about the individual establishments in each area.

Table 49: Number and Type of Tourism Accommodation in Central Border Region 2012

Area	Hotels		Guesthouse / B&Bs		Hostels		Self-Catering Units*		Total	
	No.	Beds	No.	Beds	No.	Beds	No. of Units	Beds	No. of Premises	Beds
Cavan	17	1,870	31	377	0	0	87	453	97	2,700
Donegal	58	6,655	103	1,203	16	557	338	1,758	333	10,173
Leitrim	6	536	24	330	0	0	46	240	55	1,106
Monaghan	9	755	14	191	0	0	48	250	37	1,196
Sligo	17	2,370	55	614	2	76	87	453	130	3,513
Armagh City, Banbridge and Craigavon	7	204	37	306	1	59	49	220	75	1,092
Fermanagh and Omagh District	14	1,212	120	1,171	8	394	399	2,350	347	5,285
Mid Ulster District	9	588	36	321	0	0	54	321	86	1,230
ICBAN Region	137	14,190	420	4,513	27	1,806	1,108	6,045	1,160	26,295
Rep of Ireland	856	135,011	2,089	26,154	126	8,056	4,934	25,657	4,584	194,878
Northern Ireland	136	16,839	722	7,019	50	2,719	2,267	11,801	2,320	38,378

Source: See links below

* Most self-catering units are in single-unit premises, though some are at multi-unit premises. As no figures are given for number of ‘bed spaces’ at s-c premises in RoI, this Table assumes an average of 5.2 bed spaces per unit, same as the average for NI units.

Table 50: Number and Grade of Hotels in Central Border Region 2012

Area	5*	4*	3*	2*	1*	Other	Total Hotels
Cavan	0	5	4	8	0	0	17
Donegal	1	15	32	7	3	0	58
Leitrim	0	2	2	2	0	0	6
Monaghan	0	4	2	3	0	0	9
Sligo	0	7	6	1	2	1	17
Armagh City, Banbridge and Craigavon	0	0	3	2	2	0	7
Fermanagh & Omagh	1	3	3	0	0	5	12
Mid Ulster	0	0	6	3	0	0	9
ICBAN Region++	2 (5%)	36 (12%)	58 (14%)	26 (18%)	7 (22%)	6 (13%)	135 (14%)
Rep of Ireland	35	271	376	141	30	3	856
Northern Ireland	4	31	48	6	2	45	136

Source: See links below

++ The figure in brackets refers to the Region's % of the Island total for that grade

http://www.failteireland.ie/Failtelreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Accommodation-Capacity-2012.pdf?ext=.pdf Accommodation Rol 2012

<http://www.discoverireland.ie/Where-To-Stay/Accommodation-Guide> Rol Search by Type and County

http://www.failteireland.ie/Failtelreland/media/WebsiteStructure/Documents/3_Research_Insights/3_General_SurveysReports/Accommodation_Occupancy_January_to_June_2012.pdf?ext=.pdf Rol Accommodation Occupancy Reports

<http://www.discovernorthernireland.com/accomfinder/> NI Search by Type and Location

<http://www.discoverireland.com/gb/accommodation/> All Island Search by Type and County links to Camping and Caravan Sites in NI. (Rol figures are on p 12 of the 1st site above.)

6e.7 Other Tourism Data Sources

Several other local websites also provide access to tourism facilities in the Region e.g.

http://www.donegaldirect.com/ws_section_list.aspx?Page=7&Section=Accommodation&Category=Hotels or

<http://www.fermanaghlakelands.com/>

<http://www.flavourof Tyrone.com/>

<http://www.nitb.com/BusinessSupport/IndustryAssociationsTourismBodies.aspx> NI Links to other sites

Each of the Councils, in Rol and also in NI, has varying degrees of responsibility for tourism services and facilities in their own County / District. Some of the Councils have 'tourism staff' and can provide local statistics, as well as the tourism section of their respective websites. Examples of Council or other local websites include:

http://www.cavan.ie/cavantourism/Default.aspx?StructureID_str=1 or <http://www.thisiscavan.ie/>
<http://www.donegal.ie/> <http://www.discover-donegal.com/> <http://www.donegalhotels.ie/>
<http://www.leitrimtourism.com/>
<http://www.monaghantourism.com/default.aspx>
<http://www.sligotourism.ie/> <http://sligotourism.com/>
<http://www.armagh.gov.uk/tourism-culture> <http://www.armagh.co.uk/>
<http://www.cookstown.gov.uk/visitorincookstown/>
<http://www.dungannon.gov.uk/index.cfm/area/page/categorykey/43>
<http://www.fermanagh.gov.uk/tourism/tourist-information.html>
http://www.omagh.gov.uk/culture_leisure_and_tourism/
<http://www.visitomagh.co.uk/information/>
<http://www.magherafelt.gov.uk/tourism/>

There are also **private organisations** that provide tailored market intelligence, including regional profiling, on the level of visitors and their characteristics. One such company is from the Region, the award-winning Travel Logic, from Donegal town.

Data Difficulties

All tourism data are estimates, based on a number of samples, surveys and returns and must therefore be treated with caution (even they are sometimes referred to as ‘facts’). The most detailed analysis of the tourism sector is at the ‘national’ RoI and NI levels, though these are of limited use at a sub-regional level such as for the Central Border Region. The most useful tourism figures for the purposes of the Central Border Region are the Northern Ireland Local Authority Tourism Estimates, and the Regional estimates for the RoI; however, such local data are ‘subject to low levels of statistical confidence’, even though they are based on 3-year rolling averages. The local figures are very dated; as of May 2013, the latest LGD figures for RoI are 2010 and 2009 for NI.

Despite increased co-operation between RoI and NI tourism authorities, including international marketing of the whole island by Tourism Ireland, and CSO / NISRA provide mutual Household Survey data and on trips to the other jurisdiction, there seems to be limited co-ordination or standardisation of the collection and presentation of tourism data, meaning that it is not very compatible on a cross-border basis e.g. RoI counties data on visitor numbers / revenue is for overseas visitors only, whereas NI provides county level data for overseas, RoI and domestic visitors combined.

<http://www.cso.ie/en/media/csoie/releasespublications/documents/tourismtravel/2011/hotra2011.pdf>

<http://www.cso.ie/en/surveysandmethodology/tourismandtravel/householdtravelsurvey/>

Rol Household Travel Survey 2011, also link to Methodology report (2007)

The 'revenue generated' figures are based upon estimates of 'spend per visitor', based upon nationally / internationally accepted spend estimates together with data from CSO / NISRA household surveys and port / exit surveys of visitors. Whilst it is necessary to recognize possible limitations on accuracy of these figures, they are nevertheless the best available.

The official data for visitor attractions gives an indication of the most popular attractions and the scale of their usage; however these figures need to be treated with caution - as it is based on estimate returns from those attractions who reply, some of which are paying, others are free, others include visitors / users of a wider enterprise / events, some private / others are public / subsidized, some cater primarily for domestic / local people, etc.

Similarly, the data for jobs created / retained by the tourism industry is also open to wide interpretation. Official statistics relate to a fairly wide 'employment sector' (e.g. for NI SIC Codes or Rol NACE Sector); whilst these categories would include accommodation, leisure activities, restaurants, etc. that would be used by tourists, it also includes travel agents (who mostly deal with outbound tourism), bookies, pubs, hot food take-away outlets, etc. - that are not tourist - focused. Indeed, realistically, most restaurants or pubs might only get 5-20% of their business from tourists - depending on their location and season. Additionally, many of the jobs may be part-time, seasonal or use students / low-paid. Therefore, this 'tourism data', which is primarily available at state level, must be treated with particular caution.