**Tourism**

Tourism data is derived from a variety of sources and the Covid-19 pandemic had a significant effect on these sources. As a result, there was no new estimates published for the following data between 2019 and 2023[[1]](#footnote-1). The number of overnight trips to the borough has varied over the period presented. 2014 saw the highest number of estimated overnight trips to Armagh City, Banbridge and Craigavon Borough (231,852). After falling in 2015 and 2016, the number of overnight trips increased again in 2017, however the following year this figure fell again by approximately 40,000 and since then, the number of overnight trips has remained around 189,000 for the years where data is available. The number of nights spent in the borough in 2023 was estimated at 665,781. Of the years presented below, 2013 saw the highest number of nights spent at 817,881. Expenditure by visitors to the borough in 2023 was estimated at £33,854,589 which is the highest it has been of the years presented.

|  |  |  |  |
| --- | --- | --- | --- |
|   | Overnight Trips | Nights | Expenditure |
|   | **Number** | **% of NI** | **Number** | **% of NI** | **£** | **% of NI** |
| 2013 | 201,161 | 5% | 817,881 | 6% | 21,894,975 | 3% |
| 2014 | 231,852 | 5% | 769,692 | 5% | 28,120,012 | 4% |
| 2015 | 149,782 | 3% | 563,238 | 4% | 22,539,092 | 3% |
| 2016 | 144,952 | 3% | 726,296 | 5% | 25,548,339 | 3% |
| 2017 | 228,595 | 5% | 780,583 | 5% | 32,384,669 | 3% |
| 2018 | 188,551 | 4% | 704,130 | 4% | 26,404,319 | 3% |
| 2019 | 189,456 | 4% | 646,945 | 4% | 31,835,207 | 3% |
| 2023 | 188,921 | 4% | 665,781 | 4% | 33,854,589 | 3% |

*Table 1: Estimated overnight trips, nights and expenditure in Armagh City, Banbridge and Craigavon Borough 2013 to 2023. Source: Tourism Statistics, NISRA.*

*Figure 1: Estimated overnight trips, nights and expenditure in Armagh City, Banbridge and Craigavon Borough 2013 to 2023. Source: Tourism Statistics, NISRA.*

In 2023 the majority of overnight trips to the borough were to visit friends and relatives (57%) while approximately one third of overnight trips to the borough were for holiday / pleasure / leisure purposes (33%). Approximately 10% of overnight trips to the Borough in 2023 were for business purposes. In Northern Ireland overall, just over half of all overnight trips are for holiday / pleasure / leisure (51%), while a lower proportion are for visiting friends and relatives, 38% in Northern Ireland compared to 57% in the borough.

|   | Armagh City, Banbridge and Craigavon | Northern Ireland |
| --- | --- | --- |
| **Number** | **%** | **Number** | **%** |
| Holiday / Pleasure / Leisure | 61,739 | 33% | 2,804,526 | 51% |
| Visiting Friends and Relatives | 108,124 | 57% | 2,059,236 | 38% |
| Business | 19,059 | 10% | 599,966 | 11% |
| All | 188,921 | 100% | 5,463,725 | 100% |

*Table 2: Estimated no. of overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by reason for visit, 2023. Source: Tourism Statistics, NISRA.*

*Figure 2: Estimated average overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by reason for visit, 2023. Source: Tourism Statistics, NISRA.*

As we have seen, there was an estimated £33.8 million spent in the Borough during overnight trips in 2023. The table below presents this spend by reason of visit. In Northern Ireland overall, 51% of all overnight trips are for holiday / pleasure / leisure and the spend associated with these trips’ accounts for 50% of the total spend on overnight trips.

In 2023 in Armagh City, Banbridge and Craigavon Borough it is estimated that £12.6m was spent by people spending nights in the Borough visiting friends and relatives, and while such visitors account for 57% of the total overnight visitors, their spend accounts for just 37% of the total spend. Those visiting the Borough for business account for 10% of all overnight trips but an estimated total spend of £12.2m means those staying overnight on business trips account for 36% of the total spend.

Visitors staying overnight in the Borough for holiday / pleasure or leisure purposes spent an estimated £9m in 2023 which accounts for just over a quarter of the total spend during overnight trips.

|  |  |  |
| --- | --- | --- |
|   | Armagh City, Banbridge and Craigavon | Northern Ireland |
| **Estimated Spend (£)** | **%** | **Estimated Spend (£)** | **%** |
| Holiday / Pleasure / Leisure | 9,049,436 | 27% | 605,443,505 | 50% |
| Visiting Friends and Relatives | 12,585,381 | 37% | 372,086,334 | 31% |
| Business | 12,219,773 | 36% | 237,356,518 | 20% |
| All | 33,854,589 | 100% | 1,214,886,357 | 100% |

*Table 3: Estimated spend during overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by reason for visit, 2023. Source: Tourism Statistics, NISRA.*

With regards the origin of visitors taking overnight trips to the Borough in 2023, this information is presented in Table 4 below. In the Borough, the majority of visitors were from Northern Ireland (40%) and Great Britain (31%). The figures were much the same for Northern Ireland overall at 39% and 31% respectively. Approximately 30% of overnight trips were made by visitors from ‘Other’ countries.

|   | Armagh City, Banbridge and Craigavon | Northern Ireland |
| --- | --- | --- |
| **Number** | **%** | **Number** | **%** |
| Northern Ireland | 75,484 | 40% | 2,146,278 | 39% |
| Great Britain | 58,373 | 31% | 1,708,805 | 31% |
| Other  | 55,064 | 29% | 1,608,642 | 29% |
| All | **188,921** | **100%** | **5,463,725** | **100%** |

*Table 4: Estimated number of overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by origin of visitor, 2023. Source: Tourism Statistics, NISRA. Please note percentages may not sum due to rounding.*

*Figure 3: Estimated overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by origin of visitor, 2023. Source: Tourism Statistics, NISRA.*

Of the estimated £33.8 million spent in the Borough during overnight trips in 2023, table 5 below presents this spend by origin of the visitor. Visitors from other countries outside of Northern Ireland and Great Britain spent an estimated £13.4m which accounts for 39% of the total spend in the Borough during overnight trips. Visitors from Great Britain accounted for 31% of total spend while visitors from Northern Ireland accounted for 30% of total spend during overnight trips in 2023. In Northern Ireland overall, visitors from other countries spent an estimated £477m which accounts for 39% of total spend while visitors from Great Britain accounted for 38% of total spend and visitors from Northern Ireland accounted for 22% of total spend on overnight trips.

|  |  |  |
| --- | --- | --- |
|   | Armagh City, Banbridge and Craigavon | Northern Ireland |
| **Estimated Spend (£)** | **%** | **Estimated Spend (£)** | **%** |
| Northern Ireland | 10,099,514 | 30% | 272,163,481 | 22% |
| Great Britain | 10,387,753 | 31% | 465,608,643 | 38% |
| Other  | 13,367,322 | 39% | 477,114,233 | 39% |
| All | 33,854,589 | 100% | 1,214,886,357 | 100% |

*Table 5: Estimated spend during overnight trips in Armagh City, Banbridge and Craigavon Borough and Northern Ireland by origin of visitor, 2023. Source: Tourism Statistics, NISRA. Please note percentages may not sum due to rounding.*

**Tourism Economic Statistics**

At March 2023 there were 540 tourism businesses operating in Armagh City, Banbridge and Craigavon Borough which accounted for 9.2% of the total tourism businesses operating in Northern Ireland (5,845). As can be seen in the chart below, the number of tourism businesses has been gradually increasing over the years in the Borough. When expressed as a percentage of the total in Northern Ireland, this has remained fairly consistent accounting for approximately 9% of the total tourism businesses in Northern Ireland each year.

*Figure 4: Number of tourism businesses operating in Armagh City, Banbridge and Craigavon Borough, 2015-2023. Source: Interdepartmental Business Register (NI Tourism Annual Publication)*

With regards the number of tourism jobs in Armagh City, Banbridge and Craigavon Borough, in 2022, this was estimated at 5,364 which was an increase of 11.3% on the total number of tourism jobs in the Borough in 2021 and the second largest increase after Lisburn and Castlereagh. When expressed as a percentage of the total number of tourism jobs in Northern Ireland, the Borough accounts for just 7.6% of all tourism jobs. As expected, Belfast accounts for the highest percentage of tourism jobs at 30.4% in 2022.

|  |  |  |  |
| --- | --- | --- | --- |
| District Council Area | 2021 | 2022 | % Change  |
| Antrim and Newtownabbey | 4,115 | 4,538 | 10.3% |
| Ards and North Down | 5,358 | 5,775 | 7.8% |
| Armagh City, Banbridge and Craigavon | 4,821 | 5,364 | 11.3% |
| Belfast | 19,500 | 21,394 | 9.7% |
| Causeway Coast and Glens | 5,094 | 5,602 | 10.0% |
| Derry City and Strabane | 5,150 | 5,230 | 1.6% |
| Fermanagh and Omagh | 3,680 | 3,679 | 0.0% |
| Lisburn and Castlereagh | 4,190 | 4,748 | 13.3% |
| Mid and East Antrim | 4,234 | 4,224 | -0.2% |
| Mid Ulster | 3,554 | 3,879 | 9.1% |
| Newry, Mourne and Down | 5,729 | 5,949 | 3.8% |
| Northern Ireland | **65,425** | **70,384** | **7.6%** |

*Table 6: Number of tourism businesses Jobs in Northern Ireland 2021 & 2022. Source: Business Register and Employment Survey (NI Tourism Annual Publication)*

Of the 5,364 tourism jobs in Armagh City, Banbridge and Craigavon Borough in 2022, almost 65% or 3,485 jobs were in food and beverage serving activities. Sporting and recreational activities accounted for the next highest number with 797 (14%) jobs despite the number of jobs in this sector having fallen since 2021. Transport related jobs in the tourism sector fell by almost 6% between 2021 and 2022 with these jobs only accounting for 207 jobs in the Borough.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | 2021 | 2022 | % Change | ABC as % of NI |
| Accommodation for Visitors | 502 | 523 | 4.2% | 4.7% |
| Food and Beverage Serving Activities | 3,087 | 3,485 | 12.9% | 8.4% |
| Transport | 220 | 207 | -5.9% | 4.4% |
| Sporting and Recreational Activities | 806 | 797 | -1.1% | 9.9% |
| Other | 206 | 353 | 71.4% | 7.2% |
| Total Tourism Jobs  | 4,821 | 5,364 | 11.3% | 7.6% |

*Table 7: Number of employee jobs in tourism related industries in Armagh City, Banbridge and Craigavon Borough & Northern Ireland 2021 & 2022. Source: Business Register and Employment Survey (NI Tourism Annual Publication)*

With regards the gross weekly median pay for those employed in the tourism industry, data from the annual survey of hours and earnings (ASHE) is available for 2022 and 2023 by work and home address by LGD[[2]](#footnote-2). Those persons who live in the Armagh City, Banbridge and Craigavon Borough and work in the tourism industry earned an estimated £384.80 per week in 2023 which was £7.30 less than the gross weekly median pay in 2022 but £61.30 per week more than the Northern Ireland average. Residents in Causeway Coast and Glens working in the tourism industry earned the highest gross weekly median pay at £392.50.

In terms of how the pay in the tourism industry compares with all other industries, in 2023, the average gross weekly median pay for All industries by home address was £528.90 compared to £323.50 for those working in the tourism industry. In the Borough, residents working in the tourism industry earned an estimated £140.90 below the average for all industries (£525.70).

*Figure 5: Gross weekly median pay in tourism industry by home address. Source: Annual survey of hours and earnings* *(NI Tourism Annual Publication)*

Gross weekly median pay for those employed in the tourism industry is also available by work address and by this measure, persons working in the tourism sector in Armagh City, Banbridge and Craigavon Borough earn an estimated £420 per week which is almost £100 more than the average for those employed in tourism in Northern Ireland overall. The Borough has the highest gross weekly median pay for persons employed in the tourism sector of those LGD’s for which earnings data is available.

With regards how working in the tourism industry compared with all other industries in the Borough, in 2023, the average gross weekly median pay for All industries by work address was £518.50 compared to £420.00 for those working in the tourism industry which equates to a difference of £98.50. In Northern Ireland overall, the difference was much greater at £205.40 per week. Overall, average earnings of those in the Tourism industry are well below the gross weekly median pay for all other industries.

 *Figure 6: Gross weekly median pay in tourism industry by work address. Source: Annual survey of hours and earnings* *(NI Tourism Annual Publication)*

Further information on tourism statistics can be found via the following link:

[NI Annual Tourism Statistics 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk)](https://www.nisra.gov.uk/publications/ni-annual-tourism-statistics-2023)

<https://www.nisra.gov.uk/statistics/tourism/local-government-district-tourism-statistics>

1. Due to changes in methodology, users should err caution in comparing 2023 data to previous years. [↑](#footnote-ref-1)
2. For many LGD’s, sample size was too small for a reliable estimate so data is only presented for those LGDs with data available. [↑](#footnote-ref-2)