# Jan-Dec 2015 NI Tourism Performance At a Glance[1]

tourism northernireland

| Estimate | | % Change |
|---|---|---|
| **ALL MARKETS (GB, Other overseas, ROI & NI)** | | |
| 4.5m trips | ⟷ | No change |
| 1.9m holiday trips | ↓ | -5% |
| 1.9m VFR* trips | ↑ | +2% |
| 459,000 business trips | ↑ | +23% |
| 210,000 other trips | ↓ | +1% |
| 15.4m nights | ↑ | +3% |
| £764m spend | ↑ | +3% |
| **OUT OF STATE MARKETS (GB, Other overseas & ROI)** | | |
| 2.3m trips | ↑ | +6% |
| 730,000 holiday trips | ↑ | +3% |
| 10.6m nights | ↑ | +6% |
| £545m spend | ↑ | +7% |
| **GB & OVERSEAS MARKETS** | | |
| 2m GB & overseas trips | ↑ | +10% |
| 9.8m nights | ↑ | +10% |
| £484m spend | ↑ | +8% |
| 1.3m GB trips | ↑ | +10% |
| 670,000 Other overseas trips | ↑ | +9% |
| 595,000 holiday trips | ↑ | +10% |
| 1m VFR* trips | ↑ | +9% |
| 323,000 business trips | ↑ | +13% |
| 45,000 other trips | ↑ | +5% |

| Estimate | | % Change |
|---|---|---|
| **DOMESTIC MARKET (NI to NI)** | | |
| 2.2m trips | ↓ | -4% |
| 1.2m holiday trips | ↓ | -9% |
| 809,000 VFR* trips | ⟷ | No change |
| 102,000 business trips | ↑ | +43% |
| 110,000 other trips | ↓ | -12% |
| 4.8m nights | ↓ | -5% |
| £219m spend | ↓ | -8% |
| **ROI MARKET** | | |
| 336,000 trips | ↓ | -14% |
| 134,000 holiday trips | ↓ | -18% |
| 113,000 VFR* trips | ↓ | -33% |
| 37,000 business trips | ↑ | +96% |
| 55,000 other trips | ↓ | +36% |
| 850,000 nights | ↓ | -22% |
| £61m spend | ↓ | -1% |

*VFR= visiting friends/relatives

NI welcomed 2.3m visitors from outside NI in 2015, the highest number on record and a 6% increase on 2014

GB and overseas visitors took 176,000 more trips in NI in 2015 compared with 2014, spending an additional £38m

The decline in ROI visitors to NI is undoubtedly linked to the weak Euro. ROI residents' took more overnight trips to mainland Europe and fewer trips to all other main market areas in 2015

[1]Figures relate to overnight trips only. GB refers to Great Britain, Other overseas refers to Other Europe, North America and Elsewhere overseas, NI refers to Northern Ireland and ROI refers to Republic of Ireland

Sources: Northern Ireland Passenger Survey (NISRA), Survey of Overseas Travellers (Fáilte Ireland), Country of Residence Survey (CSO) & Continuous Household Survey (NISRA)

Due to changes in methodology ROI figures were revised 10/8/16

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## Overview

**Jan-Dec 2015 NI tourism performance figures for all markets combined (GB/Other Overseas/ROI & NI) show little change in trips but some growth in nights and spend. The GB and Other overseas markets performed particularly well, with less positive results for the closer to home (NI and ROI) markets in the context of a challenging environment (including the strong sterling, more favourable VAT rate in ROI, as well as reduced levels of marketing activity).**

### STRONG GB & OTHER OVERSEAS PERFORMANCE

GB and Other Overseas tourism performance was strong during Jan-Dec 2015, with trips from each market each growing by around 10%. Following significant investment in tourism infrastructure in recent years, including attractions such as Titanic Belfast and the Gobbins as well as major events, we are attracting more GB and Other Overseas visitors and benefitting from additional nights and spend. GB and Other Overseas visitors stayed 885,000 more nights in NI compared with Jan-Dec 2014, spending an additional £38m. GB holiday trips increased by almost one fifth, with GB business and VFR trips growing by 10% and 9% respectively. Increases in Other Overseas trips were spread across all sectors (holiday, VFR, business & other), with holiday trips up 4% on 2014. NI is likely benefitting from the strong growth in Other overseas visitors to the ROI coming across the border.

### DECLINES IN ROI VISITORS IN THE CONTEXT OF A CHALLENGING ENVIRONMENT

Jan-Dec 2015 figures show large declines in most key performance measures for the ROI market, undoubtedly impacted by the weak euro which has reduced significantly in value against sterling over the last couple of years. ROI residents spent 10% fewer euros in NI however when converted to sterling, due to the exchange rate, there was a marginal decline of 1%. Reduced levels of marketing activity may also have impacted on this key market. The fall in ROI trips is largely due to a decrease in those visiting friends/relatives and for a holiday. Due to unfavourable exchange rates ROI residents likely chose to holiday in the Eurozone and they may also have invited their NI friends/relatives to head south instead for the same reason. The strong growth in ROI business trips is welcome.

### QUIET SECOND HALF OF 2015 FOR DOMESTIC TOURISM

Following a quiet second half of he year, the 2% growth recorded in domestic overnight trips during Jan-June 2015 turned into a 4% decline for Jan-Dec 2015. The poor weather may have contributed to this downturn. The fall in domestic trips in 2015 is largely due to declines in holiday trips, which were 9% less than those recorded for 2014. NI residents may have chosen to replace a domestic break with a holiday in the Eurozone during 2015 to take advantage of the strong pound. Domestic nights and spend fell by 5% and 8% respectively. Domestic tourism increased significantly in 2014 and, while 2015 figures are down on the previous year, 2015 domestic trips and spend are up on 2013.

### ACCOMMODATION STATISTICS ARE POSITIVE FOR HOTELS BUT LESS SO FOR B&BS/GUEST HOUSES/GUEST ACCOMMODATION

Accommodation statistics for Jan-Dec 2015 were positive overall for the NI hotel industry, but less so for B&Bs/guest houses and guest accommodation.

### INDUSTRY TOURISM BAROMETER PRESENTS MIXED RESULTS

Findings from Tourism NI's December 2015 Industry Tourism Barometer (a survey of approximately 500 tourism businesses) also suggest a strong performance for hotels (during Jan-Dec 2015), with a more mixed performance for other accommodation sectors and tourism businesses.

### OUTLOOK FOR 2016

The Republic of Ireland experienced very strong growth (+17%) in overseas visitors for the first quarter of 2016 which could bode well for Northern Ireland. Feedback from the Northern Ireland industry is that the year started slowly, however outlook is positive for the summer season.

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Sources: Northern Ireland Passenger Survey (NISRA), Survey of Overseas Travellers (Fáilte Ireland), Country of Residence Survey (CSO) & Continuous Household Survey (NISRA)