Jan-June 2016 NI Tourism Performance At a Glance[1]

tourism northernireland

Estimate		% Change
ALL MARKETS (GB, Other overseas, ROI & NI)		
2.1m trips	⬇	-5%
971,000 holiday trips	⬆	+7%
823,000 VFR* trips	⬇	-9%
202,000 business trips	⬇	-13%
62,000 other trips	⬇	-55%
6.5m nights	⬇	-8%
£361m spend	⬆	+4%
OUT OF STATE MARKETS (GB, Other overseas & ROI)		
1.1m trips	⬆	+11%
334,000 holiday trips	⬆	+14%
4.9m nights	⬆	+6%
£252m spend	⬆	+4%
GB & OVERSEAS MARKETS		
933,000 GB & overseas trips	⬆	+8%
4.4m nights	⬆	+4%
£230m spend	⬆	+7%
653,000 GB trips	⬆	+10%
279,000 Other overseas trips	⬆	+5%
275,000 holiday trips	⬆	+16%
496,000 VFR* trips	⬆	+11%
144,000 business trips	⬇	-9%
18,000 other trips	⬇	-10%

Estimate		% Change
DOMESTIC MARKET (NI to NI)		
943,000 trips	⬇	-20%
637,000 holiday trips	⬆	+4%
239,000 VFR* trips	⬇	-44%
43,000 business trips	⬇	-17%
25,000 other trips	⬇	-68%
1.6m nights	⬇	-34%
£108m spend	⬆	+3%
ROI MARKET		
179,000 trips	⬆	+27%
59,000 holiday trips	⬆	+6%
88,000 VFR* trips	⬆	+222%
13,000 business trips	⬇	-30%
20,000 other trips	⬇	-50%
434,000 nights	⬆	+38%
£23m spend	⬇	-15%

*VFR= visiting friends/relatives

During Jan-June 2016 visitors from all markets combined spent an unprecedented £361m in NI, up 4% on the first half of 2015. NI also welcomed almost one million holiday visitors from GB, Other overseas, ROI & NI during the first half of the year.

NI welcomed record levels of 1.1m visitors from outside NI in the first half of 2016, 11% up on Jan-June 2015.

Strong growth was evident for ROI trips and nights, with a welcome 6% increase in ROI holiday trips. The depreciating pound post-Brexit presents opportunities.

[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)

Figures revised 25/6/17

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Overview

NB: These figures largely pre-date the UK's decision to leave the EU (referendum took place on 23 June 2016).

Jan-June 2016 NI tourism performance figures for all markets combined (GB/Other Overseas/ROI & NI) show growth in spend, with £13m more revenue generated compared with the first half of 2015. While there was a decline in trips overall, holidays increased by 7%, with growth evident across all main market areas. NI welcomed record levels of visitors from outside NI during the first half of 2016. They stayed longer and spent more in NI compared with Jan-June 2015, growing the export value of tourism. Continuing the picture evident for 2015 performance, the GB and Other overseas markets performed particularly well. The latest accommodation statistics (Jan-Sep 2016) and TNI research confirm an upward trend over the summer period, as well as a positive outlook overall by the tourism sector for the last quarter of 2016. The depreciating pound post-Brexit and increased air access could bode well for NI tourism.

CONTINUED STRONG GB & OTHER OVERSEAS PERFORMANCE

GB and Other Overseas tourism performance was strong during Jan-June 2016, with trips from each market growing by 10% and 5% respectively. The increase in trips can largely be attributed to those visiting friends/relatives as well as growth in holidays. GB holiday trips were up by 29% on Jan-June 2015 while other overseas holidays grew by 6%. GB and Other Overseas visitors stayed almost 164,000 more nights in NI compared with Jan-June 2015, spending an additional £14m.

STRONG GROWTH IN ROI TRIPS & NIGHTS - DEPRECIATING POUND POST-BREXIT PRESENTS OPPORTUNITIES

Following a very positive second quarter, NI realised 27% growth in overnight trips from the ROI market during Jan-June 2016 (double the growth evident for Q1 2016). Increases in trips were largely due to significant growth in VFR visitors, who tend to stay longer but spend less per night. Subsequently, overall nights grew by almost two fifths while spend declined by 15%. The 6% increase in holiday trips is welcome. These figures largely relate to the period pre-Brexit. TNI's September2016 Industry Tourism Barometer findings (a survey of approximately 500 tourism businesses) suggest a strong summer period for this key market and the depreciating pound post-Brexit presents opportunities, particularly given that value for money is a key motivator for ROI residents.

FALL IN DOMESTIC TRIPS DUE LARGELY TO DECLINES IN VFR

Overnight trips taken by NI residents in NI declined by 20% compared with Jan-June 2015, largely due to a fall in those visiting friends/relatives and other, holiday trips increased by 4%. Domestic nights fell in line with the decline in overall trips (-16%). While NI residents took fewer and shorter domestic breaks, they spent more on average per night, helped by higher spend by holiday visitors.

HOTELS EXPERIENCED RECORD ROOM OCCUPANCY OVER SUMMER PERIOD (FOLLOWING A SLOW START)

Accommodation statistics for Jan-June 2016 were positive overall for the B&B/guest house and guest accommodation sector but less so for the NI hotel industry, following a strong year for hotels in 2015. The latest available accommodation statistics (Jan-Sep 2016) show a very positive picture overall, with NI hotels achieving record room occupancy levels over the summer period (Aug reached 88%, the highest recorded for any month, and Sep occupancy was also record breaking).

UPWARD TREND FOR TOURISM OVER SUMMER PERIOD

Findings from Tourism NI's September 2016 Tourism Industry Barometer also confirm an upward trend over the summer. All sectors of the industry reported stronger performance for Jan-Sep 2016 compared with Jan-June 2016. Encouragingly, growth was driven by all markets. Additional TNI research revealed a strong summer for many of NI's key attractions with, for example, Titanic Belfast experiencing a record breaking August and Marble Arch Caves reporting their best summer on record.

OVERALL POSITIVE OUTLOOK FOR 2016

Tourism NI's September 2016 Tourism Industry Barometer findings also suggest a continued positive outlook overall for the last quarter of 2016, with hotels, guesthouses, attractions and activity providers emerging as the most optimistic sectors. Factors that bode well for the rest of the year include favourable currency movements coupled with improvements in air access to NI over the winter period, up 8% on winter 2015 (with a significant number of new routes from Spain, Poland, Germany, Italy and Brussels).

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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)