

Estimate		% Change
ALL MARKETS (GB, Other overseas, ROI & NI)		
897,000 trips	↓	-7%
347,000 holiday trips	↓	-2%
445,000 VFR* trips	↑	+9%
85,000 business trips	↓	-31%
20,000 other trips	↓	-74%
3m nights	↑	+1%
£159m spend	↑	+10%

OUT OF STATE MARKETS (GB, Other overseas & ROI)		
471,000 trips	↑	+9%
94,000 holiday trips	↓	-8%
2.3m nights	↑	+15%
£104m spend	↑	+4%

GB & OVERSEAS MARKETS		
378,000 GB & overseas trips	↑	+8%
2.1m nights	↑	+12%
£93m spend	↑	+10%
288,000 GB trips	↑	+10%
90,000 Other overseas trips	↑	+4%
75,000 holiday trips	↑	+10%
235,000 VFR* trips	↑	+18%
59,000 business trips	↓	-20%
9,000 other trips	↑	+32%

Estimate		% Change
DOMESTIC MARKET (NI to NI)		
426,000 trips	↓	-20%
253,000 holiday trips	↑	+1%
148,000 VFR* trips	↓	-25%
21,000 business trips	↓	-44%
4,000 other trips	↓	-91%
670,000 nights	↓	-30%
£55m spend	↑	+23%

ROI MARKET		
93,000 trips	↑	+13%
19,000 holiday trips	↓	-44%
62,000 VFR* trips	↑	+445%
4,000 business trips	↓	-57%
7,000 other trips	↓	-73%
245,000 nights	↑	+42%
£11m spend	↓	-29%

*VFR= visiting friends/relatives

NI welcomed record levels of almost half a million visitors from outside NI in the first quarter of 2016, 9% up on Jan-March 2015

The ROI market has shown some signs of recovery with a 13% increase in trips in Q1 2016. The decline in ROI spend is undoubtedly linked to the weak Euro.

Visitors from all markets combined (GB, Other Overseas, ROI & NI) spent an additional £14m in NI during Jan-March 2016, with significant increases in domestic spend

¹Figures 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)

Overview

NB: Figures for the Jan-March 2016 period should be treated with caution due to small sample sizes. Jan-March is generally the quietest quarter for visitors. The picture presented below is reflective only of this period and may change as the year progresses.

Jan-March 2016 NI tourism performance figures for all markets combined (GB/Other Overseas/ROI & NI) show declines in trips but strong growth in spend. NI welcomed record levels of visitors from outside NI during the first quarter of 2016. They stayed longer and spent an additional £4m in NI compared with Jan-March 2015, growing the export value of tourism. Mirroring the picture evident for 2015 performance, the GB and Other overseas markets performed particularly well, with more mixed results for the closer to home (NI and ROI) markets in the context of a challenging environment (including the strong sterling pre Brexit, more favourable VAT rate in ROI, as well as reduced levels of marketing activity). Strong growth was evident for domestic spend while domestic trips were down, with the reverse applicable to the ROI market. TNI's June 2016 Tourism Industry Barometer findings and the latest (Jan-June 2016) serviced accommodation statistics indicate a more positive second quarter for 2016, with tourism businesses generally optimistic about the second half of the year.

STRONG GB & OTHER OVERSEAS PERFORMANCE OVERALL

GB and Other Overseas tourism performance was strong during Jan-March 2016, with trips from each market growing by 10% and 4% respectively. The increase in trips can largely be attributed to those visiting friends/relatives. GB and Other Overseas holiday trips increased by 10%, due solely to significant growth of almost one third in GB holidays. The first quarter of the year is not the traditional time for Other overseas holidays and therefore this picture is likely to change as the year progresses. GB and Other Overseas visitors stayed 226,000 more nights in NI compared with Jan-March 2015, spending an additional £8m.

STRONG GROWTH IN ROI TRIPS AND NIGHTS

Following large declines in 2015, the ROI market has shown some signs of recovery with a 13% increase in trips during Jan-March 2016, due to large increases in those visiting friends/relatives. ROI nights increased significantly (+42%), likely impacted by the increase in VFR visitors who tend to have a longer average length of stay, but lower levels of spend. Holiday trips fell by 44% on Jan-March 2015. Due to unfavourable exchange rates ROI residents likely chose to holiday in the Eurozone. The 29% fall in spend is undoubtedly impacted by the weak euro which has reduced significantly in value against sterling over the last couple of years. Reduced levels of marketing activity may also have impacted on this key market.

SIGNIFICANT INCREASE IN DOMESTIC SPEND DESPITE FALL IN DOMESTIC TRIPS

NI residents spent an additional £10m (+23%) on overnight trips in NI during Jan-March 2016, despite a fall of one fifth in domestic trips during this period. The average spend per trip increased from £85 during Q1 2015 to £129 in the first quarter of 2016. The fall in trips was largely due to declines in VFR and other trips; holiday trips increased marginally. Domestic nights fell by almost one third due to a fall in the number of overnight domestic trips and a reduction in the average length of stay compared with Jan-March 2015.

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

Accommodation statistics for Jan-March 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-June 2016) show a continuation of this picture, with a more positive second quarter overall for the serviced accommodation sector.

OVERALL POSITIVE OUTLOOK FOR 2016

Findings from Tourism NI's June 2016 Tourism Industry Barometer (a survey of approximately 500 tourism businesses) suggest a positive outlook for the second half of 2016 overall, with hotels, attractions and activity providers emerging as the most positive sectors. The Republic of Ireland experienced strong growth (+13%) in overseas visitors for the first half of 2016 which could bode well for Northern Ireland.

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