

Estimate		% Change
<b>ALL MARKETS (GB, Other overseas, ROI &amp; NI)</b>		
4.6m trips	↑	+1%
2.1m holiday trips	↑	+10%
1.8m VFR* trips	↓	-4%
425,000 business trips	↓	-7%
172,000 other trips	↓	-18%
15.2m nights	↓	-2%
£851m spend	↑	+11%

<b>OUT OF STATE MARKETS (GB, Other overseas &amp; ROI)</b>		
2.6m trips	↑	+12%
844,000 holiday trips	↑	+16%
11.4m nights	↑	+6%
£614m spend	↑	+13%

<b>GB &amp; OVERSEAS MARKETS</b>		
2.1m GB & overseas trips	↑	+9%
10.4m nights	↑	+5%
£543m spend	↑	+12%
1.4m GB trips	↑	+7%
743,000 Other overseas trips	↑	+11%
684,000 holiday trips	↑	+15%
1.1m VFR* trips	↑	+10%
307,000 business trips	↓	-5%
35,000 other trips	↓	-21%

Estimate		% Change
<b>DOMESTIC MARKET (NI to NI)</b>		
2m trips	↓	-11%
1.3m holiday trips	↑	+7%
535,000 VFR* trips	↓	-34%
83,000 business trips	↓	-19%
76,000 other trips	↓	-31%
3.8m nights	↓	-20%
£237m spend	↑	+8%

<b>ROI MARKET</b>		
456,000 trips	↑	+36%
160,000 holiday trips	↑	+19%
200,000 VFR* trips	↑	+77%
36,000 business trips	↑	+4%
61,000 other trips	↑	+10%
1m nights	↑	+18%
£70m spend	↑	+15%

\*VFR= visiting friends/relatives

During Jan-Dec 2016 visitors from all markets combined spent an unprecedented £851m in NI, up 11% on 2015. Some £2.3m was spent on average each day in 2016 by those taking overnight trips in NI.

NI welcomed record levels of 2.6m visitors from outside NI during 2016, 12% more than in 2015.

NI also welcomed over 2m holiday visitors from GB, Other overseas, ROI & NI during 2016, almost 200,00 more compared with 2015.

Strong growth of over one third was evident for ROI trips with a welcome 19% increase in ROI holiday trips. The depreciating pound presents opportunities.

<sup>1</sup>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

## Overview

**The latest tourism data released by NISRA indicate that 2016 was a strong year for NI tourism, with visitor spend reaching unprecedented levels and NI attracting record numbers of visitors from outside NI. These figures support previously released NI serviced accommodation statistics and industry feedback for 2016. Hotels achieved record breaking occupancy and sales during the year and TNI's December 2016 Industry Tourism Barometer also saw the industry in a positive mood, with the outlook strong for 2017.**

During 2016 4.6 million overnight trips were taken in NI by visitors and NI residents. They stayed for more than 15 million nights, generating over £850 million (£87 million or 11% more than in 2015). This equates to some £2.3 million spent by tourists every day during 2016. Declines in domestic tourists were off-set by growth in GB and overseas as well as ROI visitors, with NI welcoming record levels of 2.6m visitors from outside NI in 2016, 12% more than in 2015. Positively, increases in spend were evident for all main market areas, with the GB market accounting for almost half of the additional spend in 2016.

NI welcomed over 2 million holiday visitors (almost 200,000 more compared with 2015), with more holiday visitors attracted from each of our main markets. Holiday trips accounted for almost half (47%) of all trips taken in NI during 2016 compared with 43% in 2015. Declines were evident for VFR trips, solely due to the domestic market taking fewer trips to visit their NI friends and relatives.

### CONTINUED STRONG GB & OTHER OVERSEAS PERFORMANCE

GB and Other overseas performance was strong during 2016, with a 7% increase in GB trips and 11% growth in those from Other overseas. Additional visitors were attracted from each of our key Other Overseas markets (Mainland Europe and North America grew by 15% and 9% respectively in 2016). GB and Other overseas growth was driven by increases in both holiday (+15%) and VFR trips (+10%), with each of these markets delivering double digit growth in holidays. Together, the GB and Other overseas markets generated almost two thirds of total revenue (£543m) in 2016. These markets also accounted for almost 70% of the £87m growth in spend in 2016, with GB spend in particular performing strongly.

### SIGNIFICANT GROWTH IN ROI VISITORS, WITH SURGE IN Q4

NI realised significant growth of over one third (+36%) in overnight trips from the ROI, with a very strong final quarter performance. Some £192,000 was spent on average each day by visitors from ROI overnighing in NI during 2016, resulting in £70m being spent in the local economy, an additional £9m on 2015. Holiday trips grew by 19%, helped by a surge in the last three months of the year. This strong Q4 performance corresponds with Tourism NI's autumn 2016 PR campaign which encompassed significant industry participation and, together with the weak sterling, likely encouraged ROI residents to take a trip in NI during the final quarter of the year.

### GROWTH IN DOMESTIC HOLIDAYS OFF-SET BY DECLINES IN VFR

NI residents took 1.3m domestic holiday trips in NI during 2016, 7% or over 80,000 more compared with 2015. However significant declines in those taking overnight trips to visit friends and relatives more than off-set this growth, resulting in an overall decline in domestic trips. Domestic nights fell by one fifth, impacted by the fall in VFR visitors, who traditionally stay longer but spend less than other visitors. NI residents spent £237m on overnight trips in NI during 2016, £18m or 8% more than in 2015, likely due to the increased number of higher spending holiday visitors. Overall in 2016 NI residents took fewer overnight trips on the island of Ireland and more trips to GB and Other overseas.

### HOTELS EXPERIENCED RECORD BREAKING OCCUPANCY AND SALES DURING 2016

Overall hotels, guesthouses, B&Bs and guest accommodation saw a 10% increase in rooms sold during Jan-Dec 2016 compared with the same period in 2015. NI hotels achieved record breaking occupancy and sales during 2016, with over 2 million hotel rooms sold and average room occupancy reaching 70%.

### POSITIVE OUTLOOK FOR 2017

The operating environment for 2017 appears strong. The depreciation of sterling is expected to continue, making NI more competitive, and new hotels are appearing on the NI horizon. The Northern Ireland Hotels Federation reported a strong Q1 2017 performance, supported by NISRA statistics which show that NI hotels achieved record breaking sales during Jan-March 2017. Reports also suggest that summer accommodation bookings are strong. One of NI's main visitor attractions also reported a significant increase in business for the first quarter of 2017. Overall, industry feedback suggests that 2017 has started well, with the sentiment positive for the remainder of the year.

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