

Estimate		% Change
ALL MARKETS (GB, Other overseas, ROI & NI)		
3.4m trips	↓	-1%
1.7m holiday trips	↑	+6%
1.4m VFR* trips	↓	-2%
283,000 business trips	↓	-9%
126,000 other trips	↓	-30%
11.5m nights	↓	-6%
£646m spend	↑	+8%

Estimate		% Change
DOMESTIC MARKET (NI to NI)		
1.5m trips	↓	-11%
1.0m holiday trips	↑	+2%
408,000 VFR* trips	↓	-28%
51,000 business trips	↓	-17%
62,000 other trips	↓	-40%
2.9m nights	↓	-27%
£196m spend	↑	+5%

OUT OF STATE MARKETS (GB, Other overseas & ROI)		
1.9m trips	↑	+9%
652,000 holiday trips	↑	+10%
8.5m nights	↑	+4%
£452m spend	↑	+9%

ROI MARKET		
286,000 trips	↑	+27%
101,000 holiday trips	↑	+3%
133,000 VFR* trips	↑	+114%
18,000 business trips	↓	-17%
35,000 other trips	↓	-21%
646,000 nights	↑	+1%
£42m spend	↓	-7%

GB & OVERSEAS MARKETS		
1.6m GB & overseas trips	↑	+7%
8.0m nights	↑	+4%
£410m spend	↑	+11%
1.0m GB trips	↑	+5%
565,000 Other overseas trips	↑	+11%
551,000 holiday trips	↑	+11%
812,000 VFR* trips	↑	+8%
214,000 business trips	↓	-1%
29,000 other trips	↓	-12%

*VFR= visiting friends/relatives

During Jan-Sep 2016 visitors from all markets combined spent an unprecedented £646m in NI, up 8% on the first nine months of 2015. NI also welcomed 1.7m holiday visitors from GB, Other overseas, ROI & NI during the first nine months of the year.

NI welcomed record levels of 1.9m visitors from outside NI in the first nine months of 2016, 9% more than Jan-Sep 2015.

Strong growth was evident for ROI trips with a welcome 3% increase in ROI holiday trips. The depreciating pound presents opportunities.

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

Overview

The latest tourism data released by NISRA shows that performance during Jan-Sep 2016 was positive, overall. Northern Ireland attracted more visitors, who stayed longer and spent more.

3.4 million overnight trips were taken by visitors and Northern Ireland residents (a marginal decline compared to the same period 2015). They stayed for 11.5 million nights (-6%), generating over £646 million, £45 million more than during the same period in 2015 (+8%). This equates to some £2.4 million spent by tourists every day during the period. GB and other overseas markets performed better, in the main, and contributed all of the increased revenue.

More of the Jan-Sep trips were holiday trips (+6%), with the 1.7 million holiday trips representing almost half (49%) of all trips during this period (up from 46% in 2015). More holiday visitors were attracted from each key market area. The number of trips to visit friends and/or relatives declined (-2%)

This positive performance is supported by NISRA's Jan-Sep occupancy figures for serviced accommodation and Tourism NI's September Industry Barometer, which both demonstrate increased demand within the sector during the period, particularly over the summer period.

CONTINUED STRONG GB & OTHER OVERSEAS PERFORMANCE

Trips from GB and overseas residents grew by 7%. While significantly more trips were generated by GB visitors (1.04 million), than those from further overseas markets (565,000), the latter were higher spenders, on average, and more of them were holiday visitors.

The GB market grew by 5%, compared to 11% for other overseas markets, the summer seeing a stronger performance particularly from the latter. Both saw an 11% growth in holiday visitors. Together, these markets generated almost two thirds of total revenue (£410m) and £39 million more (some £142,000 more each day) than in the 2015 period

NI FAVOURABLE CHOICE FOR MORE OVERNIGHT VISITORS FROM ROI

A strong start to the year, which continued through the summer, resulted in a 27% increase in ROI visitors during Jan-Sep 2016. Demand was likely boosted by the favourable, post-EU Referendum Euro/Sterling exchange rate. The pound depreciated from €1.31 pre-referendum (23 June) to €1.15 three months later, falling to a five year low by early October 2016.

While the growth in those who came to visit friends and/or relatives was more evident, over 100,000 came to Northern Ireland for a holiday (+3%).

DECLINE IN DOMESTIC TOURISM PERFORMANCE CONTINUES ALTHOUGH HOLIDAYS MORE RESILIENT

While indications are that domestic holidays increased (by 2% based on a 3 year rolling average), 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 and revenue.

OVERALL POSITIVE OUTLOOK FOR YEAR END 2016

NISRA Jan-Nov occupancy figures for hotels, guesthouses and B&Bs, indicate that demand for rooms in October and November continued the positive summer trend. Sales were stronger than last year, with record levels for the time of year.

Tourism NI's December Industry Barometer demonstrates that the positive sentiment post-summer remained through the last quarter, across the industry. Belfast and the northern regions were the most positive about the passing year, with industries in the South of NI, while still positive on balance, less so.

OUTLOOK FOR 2017

The operating environment as we go into 2017 appears strong. By end 2016, both the Euro and US Dollar had experienced double digit appreciation against Sterling, making NI more competitive. Air capacity has also increased for Winter 2016/17, with new European routes opening and new hotels are already appearing on the horizon.

TNI's December Industry Barometer also sees the industry in positive mood, with the outlook for 2017 strong, particularly for hotel and non-accommodation providers.

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