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

tourism northernireland

Estimate		% Change
ALL MARKETS (GB, Other overseas, ROI & NI)		
2.1m total trips	↑	+2%
852,000 holiday trips	↓	-13%
880,000 VFR* trips	↑	+16%
226,000 business trips	↑	+23%
128,000 other trips	↑	+5%
6.8m nights	↓	-3%
£321m spend	↓	-8%
OUT OF STATE MARKETS (GB, Other overseas & ROI)		
993,000 trips	↑	+2%
280,000 holiday trips	↓	-2%
4.6m nights	↑	+1%
£241m spend	↓	-2%
GB & OVERSEAS MARKETS		
862,000 GB & overseas trips	↑	+7%
4.3m nights	↑	+5%
£217m spend	↑	+2%
597,000 GB trips	↑	+5%
265,000 Other overseas trips	↑	+12%
237,000 holiday trips	↑	+3%
446,000 VFR* trips	↑	+9%
158,000 business trips	↑	+8%
21,000 other trips	↑	+1%

Estimate		% Change
DOMESTIC MARKET (NI to NI)		
1.1m total trips	↑	+2%
572,000 holiday trips	↓	-18%
400,000 VFR* trips	↑	+44%
50,000 business trips	↑	+94%
73,000 other trips	↓	-4%
2.2m nights	↓	-10%
£80m spend	↓	-22%
ROI MARKET		
130,000 trips	↓	-20%
43,000 holiday trips	↓	-24%
34,000 VFR* trips	↓	-50%
19,000 business trips	↑	+68%
35,000 other trips	↑	+32%
305,000 nights	↓	-34%
£23m spend	↓	-26%

*VFR= visiting friends/relatives

Increases in trips were spread across the GB, other overseas and domestic markets, with declines in ROI visitors undoubtedly linked to the weak euro

Growth in GB and overseas spend was wiped out by a downturn in spend from the closer to home markets (ROI and NI)

Average length of stay reduced slightly from 3.4 nights (Jan-June 2014) to 3.2 nights (Jan-June 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)

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Overview & Outlook

Jan-June 2015 NI tourism performance figures for all markets combined show a small growth in trips but declines 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), likely influenced by the strong sterling as well as the more favourable VAT rate in ROI.

STRONG GB & OTHER OVERSEAS PERFORMANCE

GB and Other Overseas tourism performance was strong during Jan-June 2015. Following significant investment in tourism infrastructure in recent years , including attractions such as Titanic Belfast as well as major events, we are attracting more GB and Other Overseas visitors and benefitting from longer stays and increased spend as we provide more for them to see and do . GB and Other Overseas trips increased by 7%, with GB trips up 5% on Jan-June 2014 and Other overseas trips delivering an even stronger performance (+12%). GB and Other overseas visitors stayed over 200,000 more nights in NI compared with Jan-June 2014, spending an additional £4.5m. 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-June 2015 figures show declines for trips (-20%), nights (-34%) and spend (-26%), undoubtedly impacted by the weak euro which has reduced in value against sterling by around 20% over the last 2 years. More favourable VAT rates in the ROI as well as 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; holiday trips also declined. Due to 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.

SLOWDOWN IN DOMESTIC GROWTH

Following significant increases in 2014 , and a strong start to 2015, the growth in overnight domestic trips during Jan-June 2015 slowed to +2%. NI residents are taking shorter domestic breaks and spending less. Domestic holiday trips fell by almost one fifth. NI residents may have chosen to replace a short domestic break with a holiday in the ROI during the first half of the year to take advantage of the strong pound.

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

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

INDUSTRY TOURISM BAROMETER PRESENTS MIXED RESULTS

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

OPTIMISTIC OUTLOOK FOR LAST QUARTER OF 2015

TNI's September Industry Tourism Barometer findings show the majority of tourism businesses across all sectors expected similar or increased business levels for the last quarter of 2015.

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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)