

Estimate		% Change
<b>ALL MARKETS (GB, Other Overseas, ROI &amp; NI)</b>		
2.3m trips	↑	+10%
1.1m holiday trips	↑	+10%
901,000 VFR* trips	↑	+10%
207,000 business trips	↑	+4%
85,000 other trips	↑	+38%
7.6m nights	↑	+18%
£417m spend	↑	+16%

Estimate		% Change
<b>DOMESTIC MARKET (NI to NI)</b>		
1.1m trips	↑	+13%
690,000 holiday trips	↑	+8%
321,000 VFR* trips	↑	+35%
18,000 business trips	↓	-59%
35,000 other trips	↑	+41%
2.4m nights	↑	+49%
£122m spend	↑	+13%

<b>OUT OF STATE MARKETS (GB, Other Overseas &amp; ROI)</b>		
1.2m trips	↑	+7%
374,000 holiday trips	↑	+12%
5.2m nights	↑	+8%
£295m spend	↑	+17%

<b>ROI MARKET</b>		
221,000 trips	↑	+23%
78,000 holiday trips	↑	+33%
93,000 VFR* trips	↑	+6%
21,000 business trips	↑	+60%
29,000 other trips	↑	+48%
476,000 nights	↑	+10%
£40m spend	↑	+75%

<b>GB &amp; OVERSEAS MARKETS</b>		
973,000 GB & Overseas trips	↑	+4%
4.8m nights	↑	+8%
£255m spend	↑	+11%
651,000 GB trips	↔	No change
322,000 Other Overseas trips	↑	+15%
296,000 holiday trips	↑	+8%
487,000 VFR* trips	↓	-2%
168,000 business trips	↑	+17%
22,000 other trips	↑	+25%

\*VFR= visiting friends/relative

During Jan-June 2017 visitors from all markets combined spent £417m in NI, up 16% on the first half of 2016 and unprecedented for this time period. Some £2.3 m was spent on average each day during Jan-June 2017 by those taking overnight trips in NI

Holiday trips increased by 10% compared with Jan-June 2016, with growth apparent for each of our main market areas

NI welcomed over one third more ROI holidaymakers compared with Jan-June 2016, following on from favourable exchange rates for ROI residents and very strong TNI autumn 2016 & spring 2017 promotional campaigns

<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

Sources: Northern Ireland Passenger Survey (NISRA), Continuous Household Survey (NISRA), Survey of Overseas Travellers (Fáilte Ireland), Country of Residence Survey (CSO) & Household Travel Survey (CSO)

## Overview

**The latest tourism data released by NISRA indicate a very strong first half of 2017 for NI tourism. NI welcomed record numbers of over two million visitors for this time period, who stayed longer compared with Jan-June 2016, and spent an unprecedented £417m. The increase in trips was driven largely by growth in holiday trips, as well as those visiting friends/relatives. These figures support previously released NI serviced accommodation statistics, as well as industry feedback, for the first half of 2017.**

Over 200,000 additional trips were taken in NI by visitors and NI residents compared with Jan-June 2016, with total numbers reaching 2.3m. They stayed for 7.6 million nights, representing 1.2m more compared with the first half of 2016, largely due to significant growth in domestic nights. Spend reached £417 million (up by over £56 million or 16% on Jan-June 2016). This equates to some £2.3 million spent by visitors and domestic tourists every day during Jan-June 2017. Over one million overnight trips were taken by visitors from outside NI during the first half of the year, contributing £295m in visitor spend to the NI economy. With the exception of GB, increases in trips were apparent for each of our main market areas, with the closer to home markets (ROI and NI) accounting for most of the growth. The additional spend, however, can be attributed largely to those markets which benefitted from the weak pound - Other Overseas, as well as ROI. Domestic spend also delivered strong growth. Holiday and VFR trips each increased by 10% on Jan-June 2016, with each of our main markets delivering growth in holidays.

### **GB TRIPS ON A PAR WITH JAN-JUNE 2016 WHILE OTHER OVERSEAS TRIPS INCREASED**

GB and Other Overseas performance was mixed during the first half of 2017, with GB trips remaining on a par with the Jan-June 2016 and strong growth continuing for Other Overseas trips (+15%), resulting in a 4% growth overall in GB & Other Overseas trips. Visitors from Other Overseas may have availed of the increased air capacity into NI during winter 2016/17 (up 8% on winter 2015/16 with significant increases from Europe). Growth in GB and Other Overseas trips was driven by increases in both business (+17%) and holiday trips (+8%). Declines in GB spend (-8%) were more than offset by increases in Other Overseas spend (+45%), resulting in overall growth of 11%. This is likely due to Other Overseas visitors availing of the increased value for money offered by the weak pound (e.g. the euro appreciated by 11% against sterling during the first half of the year - £0.85 Jan-June 2017 compared with £0.77 Jan-June 2016).

### **SIGNIFICANT INCREASES IN ROI SPEND AND HOLIDAY TRIPS**

The very strong ROI performance indicated in the first three months of the year has continued into Q2 2017. Figures suggest NI realised 23% growth in overnight trips from the ROI market during Jan-June 2017 and significant increases in spend. Growth in trips was largely due to the higher spending holiday visitors, which were up by one third on Jan-June 2016. Value for money is a key motivator for ROI residents and the favourable exchange rates have helped to entice more visitors from this key market and encouraged them to spend more. This positive Jan-June 2017 performance also follows on from very successful TNI autumn 2016 and spring 2017 promotional campaigns, which were strengthened by significant industry participation.

### **NI RESIDENTS HOLIDAY MORE AT HOME**

NI residents took almost 1.1m overnight trips in NI during the first half of 2017 (120,000 or 13% more compared with the first half of 2016). Growth was largely due to increases in both VFR and holiday trips. Almost 700,000 domestic holiday trips were taken in NI, 8% or 53,000 more compared with the same period in 2016. Domestic nights increased significantly due to NI residents taking more domestic trips and staying longer. NI residents spent almost £14m more than they did during the first half of 2016 due to the additional number of trips taken. Despite extending the length of their domestic trips, the average spend per trip remained unchanged from Jan-June 2016.

### **HOTELS EXPERIENCED RECORD LEVELS OF PERFORMANCE DURING THE FIRST HALF OF 2017**

Hotels, guesthouses, B&Bs and guest accommodation saw a 9% increase in bed-spaces sold during Jan-June 2017 compared with the same period in 2016, with NI hotels achieving record breaking occupancy and sales (almost 1m hotel rooms were sold during Jan-June 2017 and average room occupancy reached 70% during this period). The latest NISRA accommodation statistics (Jan-Aug 2017) indicate continued growth year to date, with summer 2017 on a par with the strong summer performance of 2016.

### **INDUSTRY INTELLIGENCE REPORTS POSITIVE FIRST HALF FOR 2017 WITH OPTIMISTIC OUTLOOK**

Overall, TNI's June 2017 Tourism Industry Barometer feedback corroborates the positive Jan-June 2017 performance figures, with hotels generally reporting an excellent Jan-June 2017, and growth evident from all markets. More than three-fifths of attractions also reported increases in visitor numbers compared with Jan-June 2016. Early indications from TNI's Sep 2017 Tourism Industry Barometer point to continued growth, albeit at a slower rate, with the industry generally optimistic about the remainder of the year.

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