

Estimate		% Change
ALL MARKETS (GB, Other overseas, ROI & NI)		
1m trips	↑	+6%
439,000 holiday trips	↑	+15%
440,000 VFR* trips	↓	-6%
97,000 business trips	↑	+13%
37,000 other trips	↑	+93%
3.6m nights	↑	+21%
£170m spend	↑	+7%

OUT OF STATE MARKETS (GB, Other overseas & ROI)		
512,000 trips	↑	+9%
118,000 holiday trips	↑	+25%
2.4m nights	↑	+12%
£117m spend	↑	+15%

GB & OVERSEAS MARKETS		
407,000 GB & overseas trips	↑	+8%
2.2m nights	↑	+13%
£98m spend	↑	+7%
303,000 GB trips	↑	+5%
103,000 Other overseas trips	↑	+17%
92,000 holiday trips	↑	+23%
230,000 VFR* trips	↓	-2%
74,000 business trips	↑	+29%
10,000 other trips	↑	+27%

Estimate		% Change
DOMESTIC MARKET (NI to NI)		
501,000 trips	↑	+4%
321,000 holiday trips	↑	+12%
152,000 VFR* trips	↓	-9%
10,000 business trips	↓	-58%
18,000 other trips	↑	+316%
1.1m nights	↑	+48%
£53m spend	↓	-6%

ROI MARKET		
105,000 trips	↑	+13%
26,000 holiday trips	↑	+36%
58,000 VFR* trips	↓	-8%
12,000 business trips	↑	+194%
9,000 other trips	↑	+32%
247,000 nights	↑	+1%
£19m spend	↑	+79%

*VFR= visiting friends/relative

During Jan-March 2017 visitors from all markets combined spent £170m in NI, up 7% on Q1 2016 and unprecedented for this time period. Some £1.9m was spent on average each day during Jan-March 2017 by those taking overnight trips in NI.

Holiday trips increased by 15% compared with Jan-March 2016, with growth apparent for each of our main market areas.

NI welcomed over one third more ROI holidaymakers compared with Jan-March 2016, following a very strong TNI autumn 2016 promotional campaign. The depreciating pound also continues to present 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

NB: Figures for the Jan-March 2017 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.

The latest tourism data released by NISRA indicate a very positive first quarter of 2017 for NI tourism, with NI welcoming more visitors who stayed longer and spent more. Over one million overnight trips were taken in NI during Jan-March 2017 (unprecedented for this time period), driven largely by growth in holiday trips. Visitor spend also reached record levels of £170m during Jan-March 2017, up 7% on Q1 2016. These figures support previously released NI serviced accommodation statistics, as well as industry feedback for 2017. Hotels achieved previously unsurpassed occupancy and sales during the first quarter of the year and TNI's June 2017 Industry Tourism Barometer also saw the tourism industry in a positive mood, with the outlook strong for the remainder of 2017.

During Jan-March 2017 over one million overnight trips were taken in NI by visitors and NI residents. They stayed for 3.6 million nights, generating over £170 million (£12 million or 7% more than in 2016). This equates to some £1.9 million spent by tourists every day during Jan-March 2017. Half a million overnight trips were taken by visitors from outside NI during the first quarter of the year, contributing over £117m in visitor spend to the NI economy. Increases in trips were apparent for each of our main market areas, with the growth equally attributable to the closer to home markets (ROI and NI) and the GB and Other overseas markets. The growth in spend, however, can be attributed to those markets which benefitted from the weak pound – ROI and Other Overseas. Holiday and business trips increased by 15% and 13% respectively on Jan-March 2016, with declines indicated for those visiting friends/relatives. Holiday trips accounted for 43% of all trips taken in NI during Q1 2017 compared with 40% in Q1 2016, with each of our main markets delivering growth.

CONTINUED STRONG GB & OTHER OVERSEAS PERFORMANCE

GB and Other overseas performance was strong during 2016 and this continued into the first quarter of 2017, with a 5% increase in GB trips and 17% growth in those from Other overseas (North America +12%, Mainland Europe +21% and Other areas +17%). GB and Other overseas visitors 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 was driven by increases in both business (+29%) and holiday trips (+23%), with North American and Mainland European holidays each increasing by one third on Jan-March 2016. Together, the GB and Other overseas markets generated almost three fifths of total revenue (£98m) in Q1 2017. A small decline in GB spend was more than offset by the 23% growth (+£7m) in Other overseas spend, largely due to visitors from Mainland Europe spending more and availing of the increased value for money offered by the weak pound (the euro was worth 12% more than sterling in Q1 2017 compared with Q1 2016).

FURTHER GROWTH IN ROI VISITORS, WITH SIGNIFICANT INCREASES IN SPEND

Following on from a very strong ROI performance in the final quarter of 2016, NI realised 13% growth in overnight trips from the ROI market during Jan-March 2017, with significant increases in spend. Growth in trips was largely due to the higher spending business and holiday visitors, with the 36% increase in holiday trips particularly welcome. 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 Q1 2017 performance also follows a very strong TNI autumn 2016 promotional campaign, which was strengthened by significant industry participation.

NI RESIDENTS HOLIDAY MORE AT HOME

NI residents took over 320,000 domestic holiday trips in NI during Q1 2017, 12% or over 33,000 more compared with Q1 2016. Due to declines in those visiting friends/relatives and taking business trips the overall growth in domestic trips was reduced to 4%. Domestic nights increased significantly due to NI residents taking more domestic trips and staying longer, however NI residents' average spend per night fell, resulting in an overall decline in domestic spend of 6%.

HOTELS EXPERIENCED RECORD BREAKING OCCUPANCY AND SALES DURING THE FIRST QUARTER OF 2017

Overall hotels, guesthouses, B&Bs and guest accommodation saw a 14% increase in rooms sold during Jan-Mar 2017 compared with the same period in 2016, with NI hotels achieving record breaking occupancy and sales (over 438,000 hotel rooms sold were sold during Q1 2017 and average room occupancy reached 62%).

INDUSTRY INTELLIGENCE REPORTS POSITIVE FIRST HALF FOR 2017 WITH OPTIMISTIC OUTLOOK

The latest NISRA accommodation statistics (Jan-June 2016) indicate that the positive performance reported for hotels, guesthouses, guest accommodation and B&Bs for Jan-March 2017 continued into Q2. Overall, TNI's June 2017 Tourism Industry Barometer findings corroborate this, with hotels generally reporting an excellent Jan-June 2017, with growth evident from all markets. More than three-fifths of attractions also reported increases in visitor numbers compared with Jan-June 2016. Overall, industry feedback suggests a positive first half for 2017, with an optimistic outlook for the remainder of the year.

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