

Jan-Mar 2018 NI Tourism Performance At a Glance¹



Estimate % Change

ALL MARKETS (GB, Other Overseas, ROI & NI)

 **£180m spend** **+8%**

 **989,000 trips** **-1%**

 **398,000 holiday trips** **-8%**

 **3.1m nights** **-5%**

During Jan-Mar 2018 visitors from all markets combined spent an unprecedented **£180m** in NI (£13m more compared with Jan-Mar 2017).

£2m was spent on average each day during Jan-Mar 2018 by those taking overnight trips in NI.

OUT OF STATE MARKETS (GB, Other Overseas & ROI)

480,000 trips ↓ -6%

123,000 holiday trips ↑ +4%

2.3m nights ↑ +2%

£120m spend ↑ +4%

Estimate % Change

ROI MARKET

101,000 trips ↓ -4%

34,000 holiday trips ↑ +29%

40,000 VFR* trips ↓ -30%

9,000 business trips ↓ -22%

17,000 other trips ↑ +79%

302,000 nights ↑ +23%

£21m spend ↑ +11%

GB & OVERSEAS MARKETS

379,000 GB & overseas trips ↓ -7%

2.0m nights ↓ -1%

£98m spend ↑ +3%

279,000 GB trips ↓ -8%

100,000 Other overseas trips ↓ -1%

89,000 holiday trips ↓ -3%

216,000 VFR* trips ↓ -6%

66,000 business trips ↓ -11%

7,000 other trips ↓ -26%

DOMESTIC MARKET (NI to NI)

509,000 trips ↑ +4%

275,000 holiday trips ↓ -13%

154,000 VFR* trips ↑ +5%

62,000 business trips ↑ +499%

18,000 other trips ↑ +11%

862,000 nights ↓ -19%

£60m spend ↑ +16%

*VFR= visiting friends/relatives



Overview

NB: Figures for the Jan-March 2018 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 positive first quarter of 2018 for NI tourism, particularly in terms of visitor spend. Expenditure reached record levels of £180m during Jan-March 2018, up 8% on Q1 2017. Just under one million overnight trips were taken in NI during Jan-March 2018 representing a 1% drop when compared to the same period last year. The overall number of nights dropped by 5% to 3.1m over the same period. The poor weather conditions in January will have had a part to play in these minor decreases. Hotels achieved previously unsurpassed occupancy and sales during the first quarter of the year and TNI's July 2018 Industry Tourism Barometer also saw the tourism industry in a positive mood, with the outlook strong for the remainder of 2018.

During Jan-March 2018 just under one million overnight trips were taken in NI by visitors and NI residents. They stayed for 3.1 million nights, generating £180 million (£13 million or 8% more than in the same period in 2017). This equates to some £2.0 million spent by tourists every day during Jan-March 2018. Nearly half a million overnight trips were taken by visitors from outside NI during the first quarter of the year, contributing approximately £120million in visitor spend to the NI economy. Decreases in trips were apparent for each of our main market areas, with the exception of the domestic (NI) market where the number of trips exceeded half a million – greater than all other markets combined. The growth in spend, however, can be attributed to all markets, particularly ROI and the domestic market where growth was 11% and 16% respectively. The comparative drop in holiday trips was more than offset by the increase in business trips, with declines indicated for those visiting friends/relatives. Holiday trips accounted for 40% of all trips taken in NI during Q1 2018 compared with 43% in Q1 2017, conversely business trips grew from a 10% share of all trips in Q1 2017 to 14% in Q1 2018.

GB & OTHER OVERSEAS PERFORMANCE



GB and Other overseas expenditure grew approximately 3% over Jan-March 2018 with the growth solely down to the GB market which grew by 11% to £68.3m. Expenditure in the Other overseas market decreased by 11% to just under £30m. The 7% drop in overnight trips was largely attributable to the decline in the number made by GB residents where there were nearly 25,000 fewer trips made (including 13,000 holiday trips) compared with Q1 2017. The number of nights spent in NI by GB residents stayed the same with the drop in nights therefore attributed to visitors from outside UK and ROI.

SIGNIFICANT GROWTH IN ROI MARKET NIGHTS AND SPEND



Following on from a very strong performance in 2017, NI realised an 11% growth in spend from the ROI market during Q1 2018, with the number of nights up by 23%. Trips dropped by 4%, whereas holiday trips grew by 29%, trips to visit friends and relatives dropped by nearly a third (30%), which could be down to the poor weather conditions experienced at the start of the year. Value for money continues to be a key motivator for ROI residents and the favourable exchange rates have helped to encourage visitors from this key market to stay longer and spend more.

NI RESIDENTS HOLIDAY MORE AT HOME



NI residents took 509,000 domestic holiday trips in NI during Q1 2018, 4% or nearly 20,000 more compared with Q1 2017 and representing 51% of all visitor trips in Q1. The drop in holiday trips was offset by the growth in those visiting friends/relatives and in particular those taking business trips. Whilst domestic nights decreased by 19% to 862,000, spend however increased by 16% to reach £60m representing one third of Q1 2018 overall expenditure.

HOTELS MAINTAIN STRONG OCCUPANCY AND SALES PERFORMANCE DURING THE FIRST QUARTER OF 2018

Overall hotels, guesthouses, B&Bs and guesthouse accommodation saw a 5% increase in bed spaces sold during Jan – March 2018 compared to the same period in 2017. Hotels maintained record breaking first quarter occupancy and sales (over 463,000 hotel rooms were sold during Q1 2018 and average room occupancy reached 63%).



INDUSTRY INTELLIGENCE REPORTS POSITIVE FIRST HALF FOR 2018 WITH GENERALLY OPTIMISTIC OUTLOOK

TNI's July 2018 Tourism Industry Barometer confirm this strong industry performance, with hotels reporting continued growth, albeit at a slower rate than reported during the same period last year. Following on from a bumper performance in 2017 the majority of attractions also reported a maintained or improved performance. Tourism operators have a generally optimistic outlook for the second half of 2018.