

# Jan-Sep 2017 NI Tourism Performance At a Glance<sup>1</sup>



Estimate		% Change
<b>ALL MARKETS (GB, Other Overseas, ROI &amp; NI)</b>		
3.8m trips	↑	+12%
2m holiday trips	↑	+20%
1.4m VFR* trips	↑	+4%
301,000 business trips	↑	+7%
130,000 other trips	↑	+3%
13.7m nights	↑	+20%
£747m spend	↑	+16%

<b>OUT OF STATE MARKETS (GB, Other Overseas &amp; ROI)</b>		
2m trips	↑	+7%
740,000 holiday trips	↑	+14%
9.2m nights	↑	+8%
£517m spend	↑	+15%

<b>GB &amp; OVERSEAS MARKETS</b>		
1.7m GB & Overseas trips	↑	+4%
8.4m nights	↑	+7%
£458m spend	↑	+12%
1.1m GB trips	↑	+2%
616,000 Other Overseas trips	↑	+9%
583,000 holiday trips	↑	+6%
813,000 VFR* trips	↔	No change
242,000 business trips	↑	+13%
35,000 other trips	↑	+23%

Estimate		% Change
<b>DOMESTIC MARKET (NI to NI)</b>		
1.8m trips	↑	+18%
1.3m holiday trips	↑	+23%
471,000 VFR* trips	↑	+16%
36,000 business trips	↓	-30%
49,000 other trips	↓	-21%
4.5m nights	↑	+55%
£229m spend	↑	+18%

<b>ROI MARKET</b>		
353,000 trips	↑	+25%
157,000 holiday trips	↑	+57%
127,000 VFR* trips	↓	-2%
24,000 business trips	↑	+35%
45,000 other trips	↑	+29%
771,000 nights	↑	+20%
£60m spend	↑	+45%

\*VFR= visiting friends/relative

During Jan-Sep 2017 visitors from all markets combined spent  $\frac{3}{4}$  of a billion pounds in NI, up 16% on the first nine months of 2016 and unprecedented for this time period. Some £2.7 m was spent on average each day during Jan-Sep 2017 by those taking overnight trips in NI.

A record breaking 2m holiday trips were taken in NI during Jan-Sep 2017, up by one fifth on the same period in 2016, with a surge in holidays evident over the summer period. Growth was evident for each of our main market areas, particularly the closer to home markets (NI and ROI).



## Overview

**The latest tourism data released by NISRA paint a very positive tourism performance picture for the first nine months of 2017. NI welcomed 3.8m visitors, who stayed longer compared with Jan-Sep 2016, and spent an unprecedented three quarters of a billion pounds. A record breaking two million holiday trips were taken in NI during Jan-Sep 2017, almost as many as those welcomed during the whole of 2016.**

Over 400,000 additional trips were taken in NI by visitors and NI residents compared with Jan-Sep 2016, with total numbers reaching a record breaking 3.8m for this time period. They stayed for 2.2m more nights compared with the first nine months of 2016, largely due to significant growth in domestic nights as well as overseas (excluding GB) nights. Spend reached £747m (up by £100m or 16% on Jan-Sep 2016). This equates to some £2.7m spent by visitors and domestic tourists every day during Jan-Sep 2017. Over two million overnight trips were taken by visitors from outside NI during the first nine months of the year, contributing £517m in visitor spend to the NI economy. With the exception of GB, which delivered nominal increases in visitors, strong growth was apparent for each of our main market areas. The additional spend is equally attributable to the closer to home markets (ROI and NI) and those from overseas (excluding GB); GB spend remained flat. An additional 330,000 holiday trips were taken in NI compared with Jan-Sep 2016, with growth evident for each of our main market areas, particularly the domestic market.

### **NOMINAL GROWTH IN GB TRIPS WHILE OTHER OVERSEAS PERFORMANCE REMAINS STRONG**

GB and Other Overseas performance was mixed during the first nine months of 2017, with GB trips showing nominal growth (+2%) and Other Overseas trips up by 9% compared with Jan-Sep 2016. The GB market recovered somewhat over the summer period (Jan-June 2017 figures showed no growth in trips). Conversely growth in other overseas trips, while remaining strong, appeared to have slowed over the summer (+9% for Jan-Sep 2017 compared with +15% for Jan-June 2017). Visitors from Other Overseas may have availed of the increased air capacity into NI from Europe during winter 2016/17 and summer 2017. Growth in GB and Other Overseas trips was driven by increases in both business (+13%) and holiday trips (+6%). The lack of growth in GB spend (no change on Jan-Sep 2016) was more than compensated for by increases in Other Overseas spend (+28%), resulting in overall growth of 12%. 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 10% against sterling during the first nine months of the year - £0.87 Jan-Sep 2017 compared with £0.79 Jan-Sep 2016).

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

The very strong ROI performance indicated in the first half of the year has continued into Q3 2017. Figures suggest NI realised growth of one quarter in overnight trips from the ROI market during Jan-Sep 2017 and significant increases in spend. Growth in trips was largely due to the higher spending holiday visitors, which were up by almost three-fifths on Jan-Sep 2016, with a surge in holiday trips evident in Q3. The 20% increase in nights is largely due to the increased number of ROI holiday visitors welcomed, as well as some growth in their average length of stay. Overall, ROI visitors spent on average £13 more per night than they did during Jan-Sep 2016, likely helped by the favourable exchange rates. This positive Jan-Sep 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 1.8m overnight trips in NI during Jan-Sep 2017 (270,000 or 18% more compared with the first nine months of 2016). Growth was driven by large increases in holiday trips, as well as those visiting friends/relatives. Almost 1.3m domestic holiday trips were taken in NI, up by almost one quarter on Jan-Sep 2016. Domestic nights increased significantly due to NI residents taking more domestic trips and staying longer. NI residents spent almost £35m more than they did during the first nine months of 2016 due to the additional number of trips taken. Despite extending the length of their domestic trip, the average spend per trip remained unchanged from Jan-Sep 2016.

### **HOTELS EXPERIENCE INCREASED SALES & OCCUPANCY LEVELS**

Supporting the positive NI tourism performance figures, hotels, guesthouses, B&Bs and guest accommodation saw a 6% increase in rooms sold during Jan-Sep 2017, equating to an additional 107,000 rooms sold compared with the same period in 2016. Hotels experienced increased sales and occupancy levels during the first nine months of 2017. Hotel performance in the first half of 2017 was much stronger in comparison to the slow start seen in 2016. Summer 2017, while still achieving record levels, was more on a par with summer 2016. The latest NISRA accommodation statistics (Jan-Nov 2017) indicate continued growth year to date.

### **INDUSTRY INTELLIGENCE REPORTS POSITIVE FIRST NINE MONTHS OF 2017 WITH OPTIMISTIC OUTLOOK**

TNI's September 2017 Tourism Industry Barometer confirms an industry in a positive mood, with half of all tourism businesses and almost three quarters of hotels reporting growth for the Jan-Sep 2017 period. The December 2017 Barometer indicates a positive final quarter for 2017 with strong levels of growth being maintained across all main markets. Overall, tourism operators have an optimistic outlook for 2018, with many anticipating a continued increase in business this year.