





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



Estimate % Change

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

	<b>£926m spend</b>	<b>+9%</b>
	<b>4.9m trips</b>	<b>+6%</b>
	<b>2.5m holiday trips</b>	<b>+16%</b>
	<b>16.9m nights</b>	<b>+11%</b>

During Jan-Dec 2017 visitors from all markets combined spent an unprecedented £926m in NI (£76m more compared with Jan-Dec 2016).

£2.5 m was spent on average each day during Jan-Dec 2017 by those taking overnight trips in NI.

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

2.7m trips	↑	+3%
946,000 holiday trips	↑	+12%
11.6m nights	↑	+3%
£657m spend	↑	+7%

## GB & OVERSEAS MARKETS

<b>2.2m GB &amp; Overseas trips</b>	↑	+2%
10.6m nights	↑	+2%
£566m spend	↑	+4%
1.4m GB trips	↑	+1%
778,000 Other Overseas trips	↑	+5%
709,000 holiday trips	↑	+4%
1.1m VFR* trips	↔	No change
315,000 business trips	↑	+3%
45,000 other trips	↑	+27%

Estimate % Change

## ROI MARKET

<b>482,000 trips</b>	↑	+6%
237,000 holiday trips	↑	+49%
163,000 VFR* trips	↓	-18%
29,000 business trips	↓	-18%
54,000 other trips	↓	-12%
1m nights	↑	+4%
£90m spend	↑	+29%

## DOMESTIC MARKET (NI to NI)

<b>2.2m trips</b>	↑	+11%
1.5m holiday trips	↑	+18%
565,000 VFR* trips	↑	+6%
45,000 business trips	↓	-45%
63,000 other trips	↓	-17%
5.2m nights	↑	+37%
£270m spend	↑	+14%

\*VFR= visiting friends/relatives



## Overview

The latest tourism data released by NISRA indicate another strong year for Northern Ireland (NI) tourism.

- Figures estimate NI welcomed 4.9m visitors during Jan-Dec 2017, who stayed longer compared with the same period in 2016, and spent an unprecedented £926m (£76m more compared with 2016)
- Some £2.5m was spent on average each day during Jan-Dec 2017 by those taking overnight trips in NI
- With the exception of GB, which delivered a nominal increase in visitors, growth was apparent for each of our main market areas (in particular the domestic market)
- NI attracted a previously unsurpassed 2.7 million visitors from outside of NI
- The additional £76m spend compared with Jan-Dec 2016 is due largely to significant increases in ROI, NI and Other Overseas spend
- A record breaking 2.5 million holiday trips were taken in NI during Jan-Dec 2017, with the growth in holidays largely attributable to the closer to home markets (NI and ROI)
- 2017 was also a record year for NI hotels in terms of both occupancy levels and sales
- The Giant's Causeway was NI's most popular visitor attraction in 2017, attracting over 1 million visitors, the highest number of visits reported in one year for a local attraction
- 112 cruise ships docked at NI ports in 2017, an increase of 19 compared with 2016
- The operating environment appears strong for 2018, with hotels achieving unprecedented sales during the first quarter of the year. New hotels are continuing to open and the depreciation of the pound continues to provide opportunities for NI
- Overall, industry feedback suggests that 2018 has started well, with sentiment generally positive for continued growth in business this year.



### NOMINAL GROWTH IN GB TRIPS WITH A STRONGER OTHER OVERSEAS PERFORMANCE

GB and Other Overseas performance was mixed during Jan-Dec 2017, with GB trips and spend showing nominal growth (+1% for each). Other Overseas trips and spend were up by 5% and 9% respectively compared with 2016. The increase in Other Overseas trips can largely be attributed to the long haul markets (Australia/New Zealand and Elsewhere) which were up by 18% on 2016, with stronger increases in spend. Mainland Europe delivered marginal growth (+1%) in trips as increases from Spain and Other European countries were largely wiped out by declines in key markets such as Germany, Netherlands and Italy, with French trips remaining flat. Visitors from Mainland Europe did however spend more, perhaps availing of the increased value for money offered by the weak pound. The 3% increase in North American trips is solely due to Canadians taking more NI trips (+14%) as USA trips remained flat compared with 2016 (due to declines in those visiting friends/relatives), possibly impacted by reduced air access directly into NI.



### SIGNIFICANT INCREASES IN ROI SPEND AND HOLIDAY TRIPS

CSO figures suggest NI realised growth of 6% in overnight trips from the ROI market during Jan-Dec 2017, with significant increases in spend. Growth in trips was solely due to the higher spending holiday visitors, which were up by almost half on 2016, to a record breaking 237,000. Overall, ROI visitors spent on average £16 more per night than they did during Jan-Dec 2016. This positive Jan-Dec 2017 performance follows on from very successful TNI spring and autumn 2017 promotional campaigns. This is also likely to have been helped by favourable exchange rates and the fact that more ROI residents stayed in paid, serviced accommodation (e.g. Hotels/B&Bs/guesthouses) compared with Jan-Dec 2016.



### NI RESIDENTS HOLIDAY MORE AT HOME

NI residents took an estimated 2.2m overnight trips in NI during Jan-Dec 2017 (209,000 or 11% more compared with Jan-Dec 2016). Growth was driven by large increases in holiday trips, as well as those visiting friends/relatives. A record number of 1.5m domestic holiday trips were taken in NI, up by almost one fifth on 2016. Domestic nights increased significantly due to NI residents taking more domestic trips and staying longer. NI residents spent over £32m more than they did during 2016 due to the additional number of trips taken, as well as a slight increase in their average spend per trip.



### HOTELS EXPERIENCE INCREASED SALES & OCCUPANCY LEVELS

Supporting the positive NI tourism performance figures, hotels, guesthouses, B&Bs and guest accommodation saw a 5% increase in bed spaces sold during Jan-Dec 2017. 2017 was a record year for hotel demand in terms of both occupancy levels and sales with over 300,000 hotel guests accommodated every month, on average, during the year. Q1 2018 NISRA accommodation statistics indicate growth in both room and bed sales compared to the same period in 2017, with hotels achieving unprecedented sales for this time period.