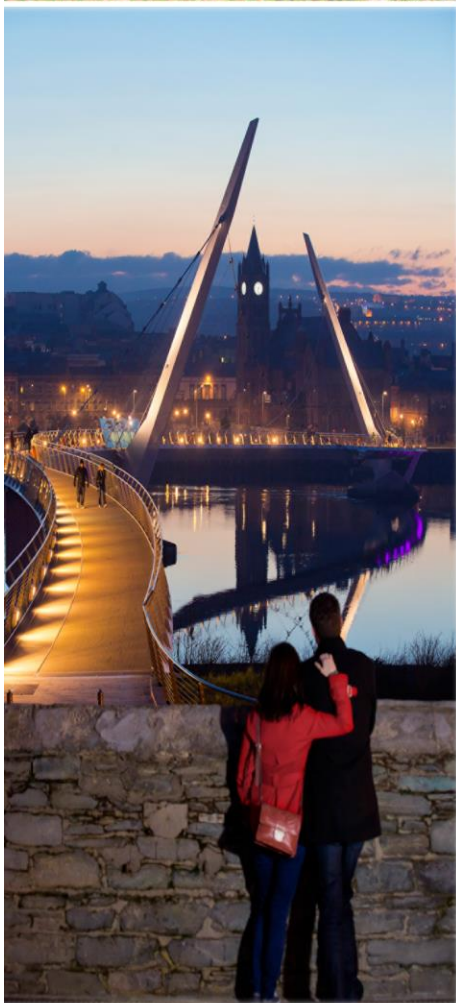




tourism  
northernireland

MillwardBrownUlster

# TOURISM INDUSTRY BAROMETER September 2017





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**All research complied fully within the Market Research Society ethical Code of Conduct and in accordance with the definitive standards of IQCS (Interviewer Quality Control Scheme) and MRQSA (Market Research Quality Standards Authority) ISO 20252:2012**

# 1. Background & Methodology

## Background and objectives

- 1.1 The Northern Ireland Tourism Industry Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year.
- 1.2 In June 2015, Millward Brown Ulster, an independent research agency, was commissioned to conduct the survey in 2015, 2016 and 2017.
- 1.3 Fieldwork for the first wave of 2017 took place between 25<sup>th</sup> September and 24<sup>th</sup> October 2017. The objectives were to measure:
  - Business performance year to date in terms of visitor volume – overall and by key markets
  - Profitability year to date
  - Average room yield year to date (hotels)
  - Visitor volume expectations for the remainder of 2017
  - Positive factors and any issues of concern affecting tourism businesses

## Methodology

- 1.4 The methodology used was a combination of an online survey and telephone interviews.
- 1.5 Tourism NI and Millward Brown Ulster worked together to develop a questionnaire for online and telephone interviewing.
- 1.6 Tourism NI provided a database of 2,189 contacts for the survey spread across numerous industry sectors (see sampling profile in appendix).
- 1.7 An e-mail was sent on 25<sup>th</sup> September to all contacts on the database containing a link to the online survey and an explanation of the survey objectives. Two subsequent reminder emails were sent to non-responders.
- 1.8 Following this, we conducted 384 ‘top-up’ interviews by telephone with non-responders in order to improve the robustness of individual sector sample sizes so that results could be reported by sector. Interviews were conducted in daytime and evening hours with business owners or managers.

## 2. Headline Findings

### The Tourism Industry Barometer and how it is conducted

- 2.1 The Northern Ireland Tourism Industry Barometer is a survey of tourism businesses designed to provide insight into tourism performance for the year to date and prospects for the remainder of the year/the following year.
- 2.2 Millward Brown Ulster received 116 responses to an online survey with tourism businesses in September 2017, and conducted 384 top-up telephone interviews.

### Excellent year for hotel sector

- 2.3 Hotels have enjoyed a strong year to date; more than seven in ten (72%) respondents reported increased visitor numbers. This is roughly on a par with the figure reported last year, when 70% of responding hotels reported an increase on 2015. The overseas (62%) market has performed strongly (although the level of growth is slightly weaker than that reported in 2016, when growth was reported by 74% of responding hotels).

### Significant increases in room yield

- 2.4 The positive year that the hotel sector has enjoyed so far in 2017 is reflected in the increase room yield as reported by seven in ten (70%) respondents.

### Weekend breaks going strong

- 2.5 The weekend break market has done particularly well, with three-fifths (61%) having reported an increase (either significant or slight) so far in 2017.

### Largely positive year so far for the guesthouse market

- 2.6 Half of the guesthouses surveyed (50%) reported increases in visitor volumes.

### B&B's demonstrating some improvement in the third quarter

- 2.7 B&B operators have reported mixed results for the year to date, but are showing some improvement on last year. Approximately two fifths (38%) of providers reported an increase in visitor volumes

### Improved performance for self-catering

- 2.8 Between two fifths and half (44%) self-catering operators reported visitor volumes to be up in 2017. This represents a consistent performance with the figures reported at this point last year, when the equivalent figure was 49%.

- 2.9 All markets for self-catering improved compared to the same period last year with the exception of Overseas which has remained consistent with the same period of last year.

### Overall good performance for attractions

- 2.10 Overall, nearly half (48%) of attractions reported an improvement on visitor numbers in 2017. Between two fifths of all attractions saw an increase in visitor volumes from Great Britain (46%) and from overseas (46%), compared to the same period of 2016. Just under two fifths saw an increase from the domestic (39%) and Republic of Ireland (38%) markets.

### Strong year so far for Belfast

- 2.11 Operators in Belfast have enjoyed a positive 2017 thus far, with approximately seven in ten (69%) of PSA respondents having reported an increase in business.

### Steady performances across the rest of the country

- 2.12 The North West and North East performed well with 52% and 51% of providers respectively reporting an increase in visitor levels. The South West was up on balance, with more respondents having reported an increase in visitor volumes (40%) than did so at this stage last year (32%). A similar proportion of providers in the South East reported an increase (41%).

### Industry optimistic for 2017

- 2.13 Overall, tourism operators have an optimistic outlook for 2017, with nearly one-third (32%) anticipating business for the rest of 2017 to be up on the corresponding period in 2016.
- 2.14 Amongst all accommodation providers, hotels are particularly optimistic for the remainder of the year, with three-fifths (61%) of respondents expecting business to increase in the last quarter, a slight improvement on the figure reported at this stage last year (58%). Following this trend more than two in five (43%) of guesthouse owners expect their business in the last three months of 2017 to be up on the corresponding period in 2016. An increase on the figure reported at this time last year (31%).

Similarly B&B and self-catering accommodation providers are more optimistic than this time last year, with more than a quarter (26% and 28% respectively) expecting better business for the remainder of 2017 compared to the same period last year. This compares to 22% and 21% of respondents in the B&B and accommodation sector in September 2016.

### Steady expectations overall for the domestic market

- 2.15 While a quarter (25%) of respondents expect an increase in domestic business, only a small number of respondents anticipate domestic business for the remainder of 2017 to be down on the volumes seen in 2016.

### Solid outlook for the Republic of Ireland market

- 2.16 The outlook for the Republic of Ireland market is positive, with more than a quarter (28%) of respondents overall expecting visitor volumes for the remainder of the year to be up from those of the last three months in 2016. Hotels are most optimistic with 57% anticipating growth. Between a fifth and quarter of other accommodation providers are also positive. Most other sectors expect visitor volumes from ROI to be the same in the last part of this year as they were in the same period in 2016.

### Consistent business expected from Great Britain & overseas

- 2.17 Overall, a quarter (25%) of respondents anticipate better business from the Great Britain and overseas market for rest of the year, and hotels are most positive with two fifths predicting growth.

### Repeat visitors key

- 2.18 Repeat visitors was the most frequently cited positive factor affecting tourism businesses, with around a third (34%) of all respondents having mentioned it.

### Local events can draw visitors

- 2.19 One-third of the sample (33%) stated local events as a positive factor affecting their business. Events in the local area are believed to encourage visitors to come to Northern Ireland.

### Recommendations and own marketing important

- 2.20 Approaching one-third and one quarter of all respondents respectively felt that their own marketing (30%) and recommendations (23%) were positive factors for their businesses.

### Other positive factors

- 2.21 Marketing by local or national tourism bodies was the fifth most frequently cited positive factor (20%) affecting tourism businesses. Around one in six (16%) cited the favourable exchange rate as a benefit for their business.

### **More respondents without concerns**

2.22 Nearly half of the respondents (49%) cited no issues of concern for their business in September 2017. This is an improvement to the figure this time last year, when approximately a third (36%) could not think of any issues.

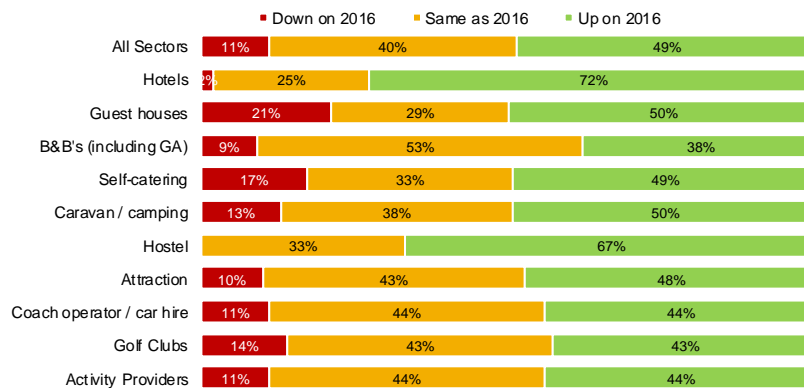
### **The economy still the main issue**

2.23 The economy was seen as the main issue of concern for respondents, with just over one in seven (16%) citing the domestic economy and more than one in ten (11%) mentioning the global economy, as areas of concern.

## 3. Visitor Volumes in 2017 by Sector

### Overall visitor volumes in 2017

How does the volume of your overall bednights \ business to date this year compare with the same period last year?



Base: all businesses established before start of 2016 (n=499)

MillwardBrown

\*Caution: some sectoral data based on small sample sizes: Guesthouses (n=14); Car Hire and Coach Operators (n=18); Hostels (n=3); Caravan and Camping (n=8); Golf Clubs (n=7)

The bases shown are the overall samples asked the question; results for each individual sector are based on the relevant sub samples of this overall population. In the charts, 'don't know' or 'not applicable' answers to the question have been excluded and the percentages re-based. Results are split by sector and shown in the same order each time.

### Strong year to date for Northern Ireland – especially for hotels

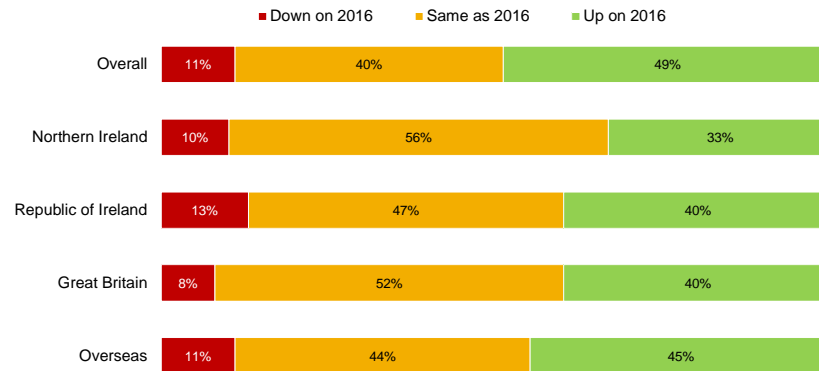
- 3.1 The above chart gives an overview of industry performance by sector to date in 2017.
- 3.2 Hotels have performed very strongly in the first nine months of the year, with more than seven in ten (72%) respondents having reported an increase in visitor numbers so far in 2017.
- 3.3 Guest houses have also performed well thus far; half of the respondents (50%) reported an increase on 2016 figures.
- 3.4 It has been a good year so far for attractions, with nearly half (48%) having reported an increase in visitor volumes and more than two-fifths (43%) reporting the same volume of visitor numbers as in the year before.
- 3.5 Self-catering operators have reported mixed results for the year to date, but there has been some improvement on last year. Nearly half (49%) reported that business was up, which is a slight increase on the figure reported (44%) at this stage last year.
- 3.6 B&B operators have experienced some challenges. Nearly two in five (38%) respondents reported an increase, which constitutes a decrease on last year's figures (49%). However,



in September 2017 respondents who reported a decrease of visitor numbers (9%) are markedly fewer than the year before (23%).

## All sectors – visitor volumes by market

ALL SECTORS - VISITOR VOLUMES BY MARKET



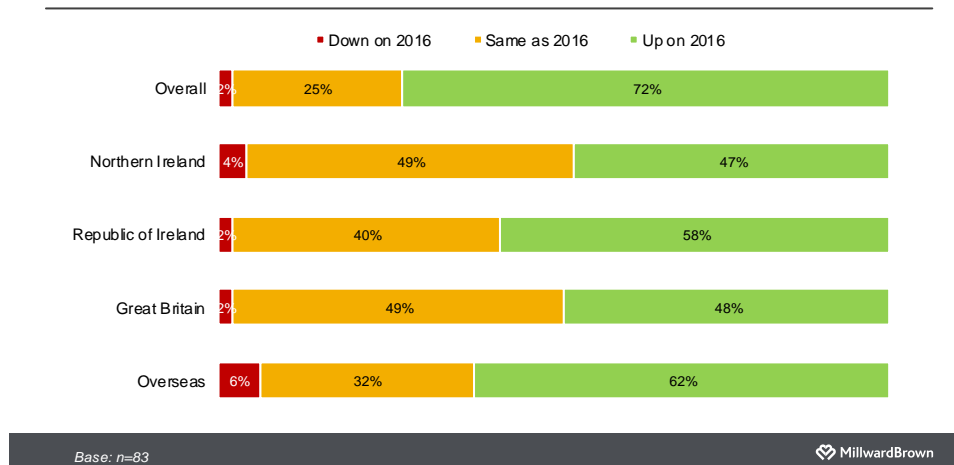
Base: n=499

MillwardBrown

- 3.7 The overseas market sees the most favourable comparison to the same period of 2016, with almost half of tourism businesses reporting growth. Other markets have also performed strongly with two fifths of businesses reporting growth from Great Britain and Republic of Ireland; and one third recording increases from the domestic market.

## Hotels – visitor volumes by market

Hotel visitor volumes by market

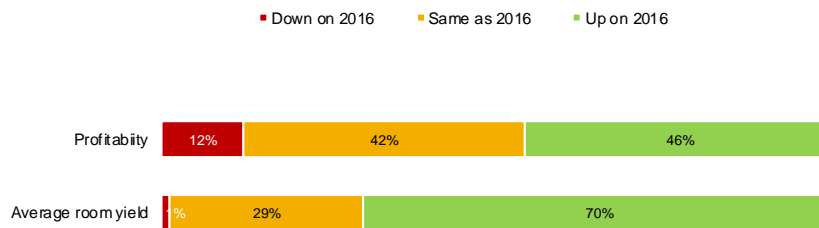


### Excellent year thus far for hotel sector

- 3.8 Hotels have enjoyed an excellent year to date; nearly three-quarters (72%) of respondents reported increased visitor numbers. All markets show good signs of growth, with few respondents reporting decreases in visitor levels.
- 3.9 The overseas (62%) market has performed strongly (although the level of growth is slightly weaker than that reported in 2016, when growth was reported by 74% of responding hotels). The domestic market has experienced an increase in respondents who reported same results year-on-year from two-fifths (40%) in September 2016 to nearly half (49%) in the third quarter of 2017. The first nine months of 2017 look more positive for the Great Britain market than the first six months with more respondents reporting an increase in consistent visitor numbers in comparison to the year before.
- 3.10 The Republic of Ireland performed strongly (58%) and has seen a smaller number of respondents who reported decreasing visitor numbers (2%) in comparison to September 2016 (8%).

## Hotels – average room yield and profitability

Hotel average room yield and profitability



Base: n=83

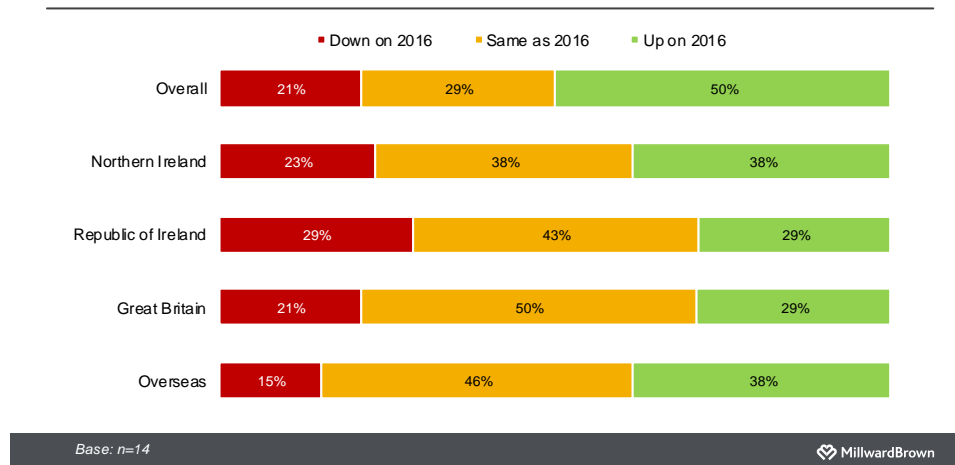
MillwardBrown

### Significant increases in average room yield

- 3.11 The excellent year that the hotel sector has enjoyed so far in 2017 is reflected in an increase in room yield, as reported by seven in ten (70%) respondents.
- 3.12 Nearly half (46%) of hoteliers stated that profitability had increased on 2016.
- 3.13 The terrific performance so far this year regarding room yield represents a significant increase on the same period last year, when over half (55%) reported increases compared to 2015.

## Guesthouses

Guesthouse visitor volumes by market



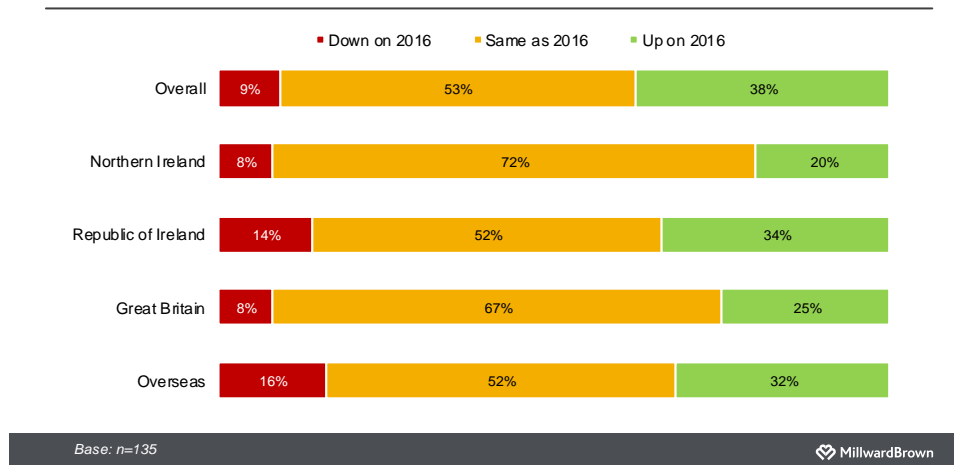
Caution: The above results are based on a small sample size (n=14)

### Largely positive year so far for the guesthouse market

- 3.14 The guesthouse sector is experiencing largely positive results with half (50%) reporting increases in visitor volumes this year. In comparison the figures for the first nine months of last year came to 73% reporting an increase in visitor numbers.
- 3.15 The domestic and Overseas market performed most strongly in terms of reported increase (38% each) on 2016 volumes, followed by the Republic of Ireland and Great Britain market with more than a quarter (29% each) having reported an increase.

## B&Bs

B&amp;B visitor volumes by market

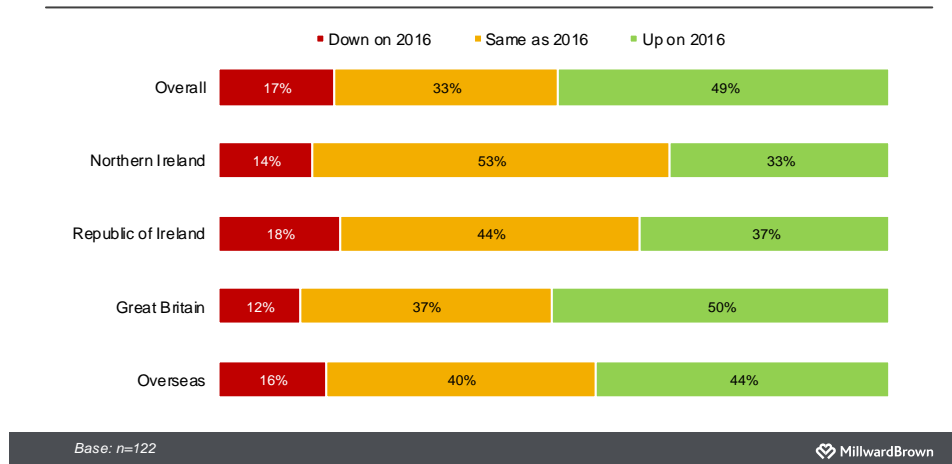


### B&B's show some improvement on last year overall

- 3.18 B&B are showing some improvement on last year. Nearly two-fifths (38%) reported that business was up and only less than one in ten (9%) reported the opposite, which is a significant decrease on the figure reported (23%) at this stage last year.
- 3.19 The domestic market has recovered from last year's figures with one in five (20%) reporting an increase in visitor volumes and less than one in ten (8%) reporting the opposite. This represents a year-on-year improvement, when less than one-fifths (18%) reported an increase and nearly one-third (30%) a decrease.
- 3.20 Positively, fewer B&B operators reported a decrease in the ROI, Great Britain and Overseas markets than did so at this point last year (2016 figures: ROI: 26%; GB: 16%; Overseas 17%).

## Self-catering

Self-catering visitor volumes by market

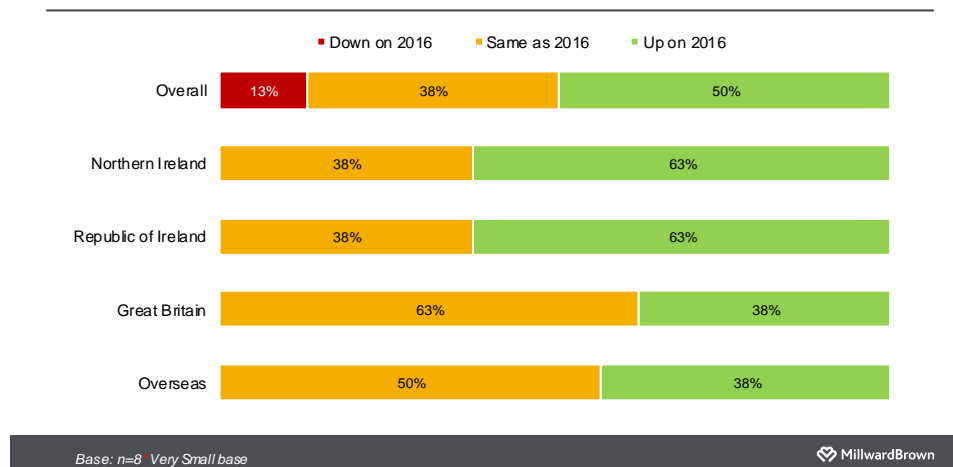


### Improved performance overall for self-catering

- 3.21 Nearly half (49%) the self-catering operators reported visitor volumes to be up in 2017. This represents an increase in volume reported at this point last year (44%).
- 3.22 The Republic of Ireland market has also improved on the same period last year, with nearly two in five (37%) reporting an increase in business so far this year, up from 29% in 2016.
- 3.23 Similarly, for Great Britain the number of self-catering providers that reported an increase (50%) has gone up compared to this point last year (43%).
- 3.24 For the domestic market also, the number of reportedly increased visitor volumes has improved slightly (33%) year-on-year (2016: 30%). Simultaneously the number of decreases has gone down for this market (14% compared to 21% last year).
- 3.25 The picture of visitor volumes from overseas markets is relatively similar to that for the same period last year. However the number of respondents who reported that visitor volumes stayed the same compared to the first nine months of 2016 has increased slightly (40% compared to 36% in 2016).

## Caravan / campsites

Caravan / campsite visitor volumes by market



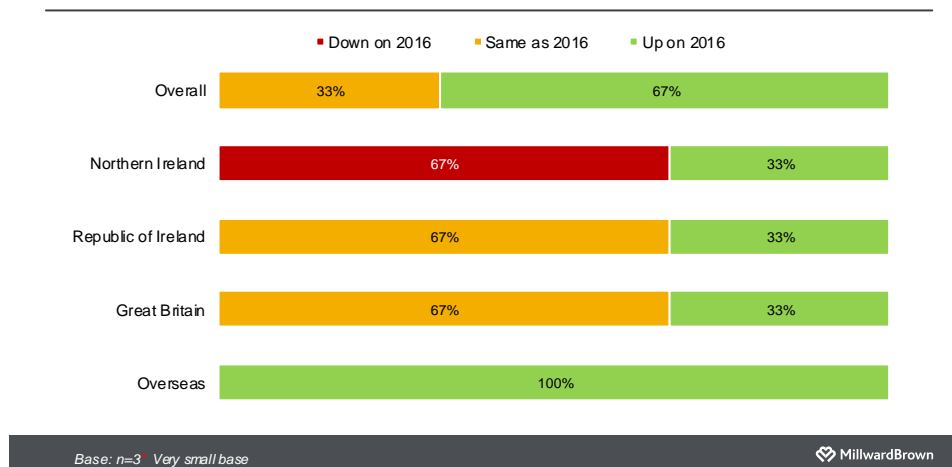
\*Caution: The above results are based on a very small sample size (n=8)

### Stronger year for the caravan and camping sector so far

- 3.27 Half (50%) of the caravan and camping proprietors that responded reported an increase in visitor numbers; a significant increase on the figure reported in September 2016 (14%).
- 3.28 The performance of the domestic market was exactly the same as for the ROI market, with more than three-thirds (63%) reporting an increase and none reporting a decrease.
- 3.29 Similarly none of the respondents reported a decrease for the Great Britain and Overseas market.

## Hostels

Hostel visitor volumes by market



\*Caution: The above results are based on a small sample size (n=3)

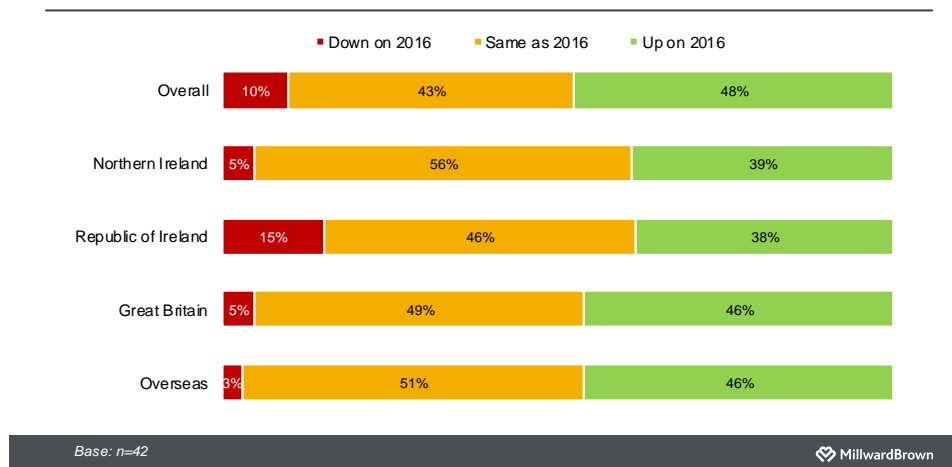
### A positive performance overall for hostels

- 3.30 Amongst the three hostel providers in the sample, two reported an increase and one reported no change in visitor volumes in 2017.
- 3.31 For the Republic of Ireland, Great Britain or Overseas markets none of the responding hostels reported a decrease in visitor volumes for the Republic of Ireland, Great Britain or Overseas markets.



## Attractions

Attraction visitor volumes by market

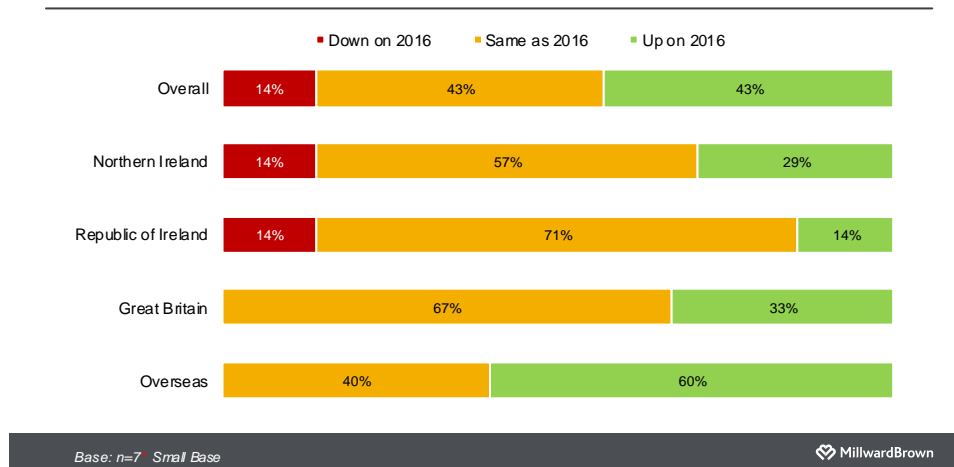


### Overall good performance for attractions

- 3.32 Overall, nearly half (48%) of attractions reported an improvement on visitor numbers in 2017. The largest proportions across all markets reported that the visitor volumes stayed the same in the first nine months of 2017 as they were in the same period in 2016.
- 3.33 For the domestic market approximately two in five (39%) have reported an increase in volumes in 2017.
- 3.34 The Republic of Ireland performed well, with nearly two-fifths (38%) having reported an increase in volumes in 2017, an improvement on the figures reported at the same stage last year (31%).
- 3.35 The Great Britain market has experienced the strongest improvement with almost half (46%) reporting an increase compared to under one-third (32%) in September 2016.

## Golf clubs

Golf club visitor volumes by market



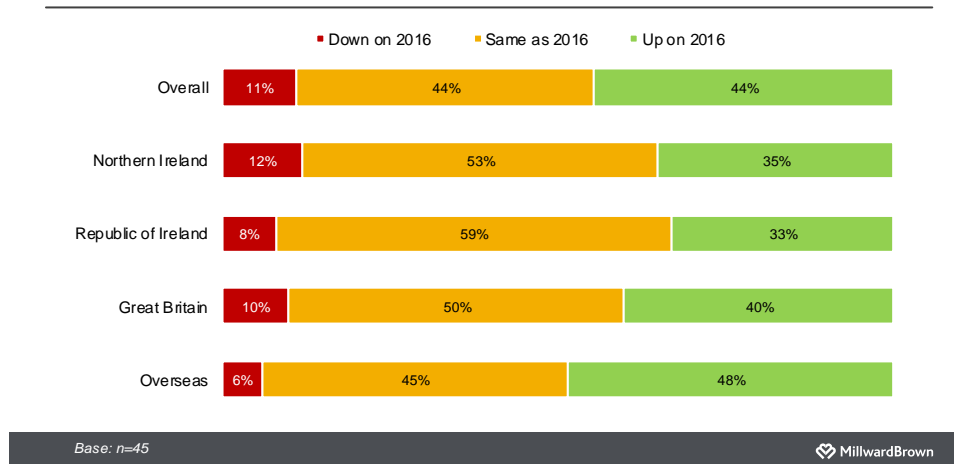
\*Caution: The above results are based on a small sample size (n=7)

### Mostly positive year so far for golf clubs

- 3.36 Overall, more than two in five (43%) golf clubs reported that visitor volumes in the first nine months of 2017 have gone up, a notable increase on their tourism 'green fee' visitor levels reported at the same point last year (32%).
- 3.37 The Overseas market has performed particularly strongly, with three in five (60%) responding golf clubs having reported an increase in 2017, up from a quarter (25%) at this point last year.
- 3.38 Across all markets significantly fewer respondents reported a decrease in visitor numbers (14%) compared to the September findings in 2016 (25%).

## Activity providers

Activity provider visitor volumes by market

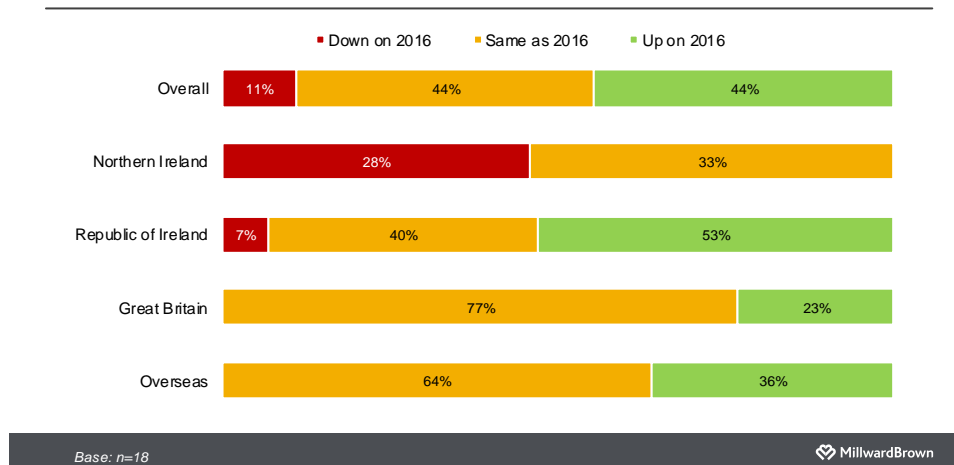


### Consistent results overall for activity providers

- 3.39 More than two-fifths (44%) of activity providers reported an increase in business in 2017, showing similar results to that time last year (44%).
- 3.40 The Overseas market has seen the greatest improvement, with nearly half (48%) having reported an increase in visitor volumes and approximately one in twenty (6%) reported the opposite, which compares to 44% and 13% respectively in September 2016.
- 3.41 In comparison to last year's results the Republic of Ireland market has seen more respondents reporting the same visitor numbers than at this time in 2016 (59%) and significantly fewer reporting a decrease (8% compared to 19% in September 2016).

## Car hire and coach operators

Car hire and coach operator visitor volumes by market



\*Caution: The above results are based on a very small sample size (n=18)

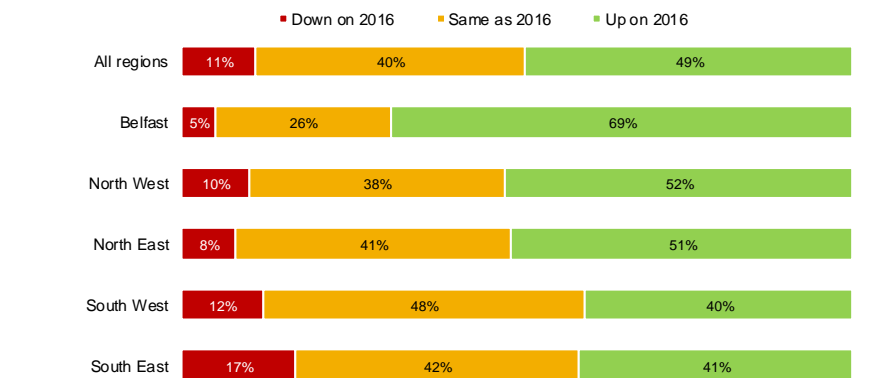
### Good performance from car-hire and coach operators

- 3.42 More than two-fifths (44%) of the coach operators or car hire companies reported an increase in visitor volumes in 2017.
- 3.43 The Republic of Ireland market performed best with more than half (53%) respondents reporting an increase.

## 4. Performance by Region

### Paid Serviced Accommodation by Region

How does the volume of your overall business / bed nights to date this year compare with the same period last year? (PSA only)



Base: n=499

MillwardBrown

The above chart illustrates the business performance by region of the weighted paid serviced accommodation sector Paid Serviced Accommodation (PSA): hotels, guesthouses and B&Bs

### Strong year so far for Belfast

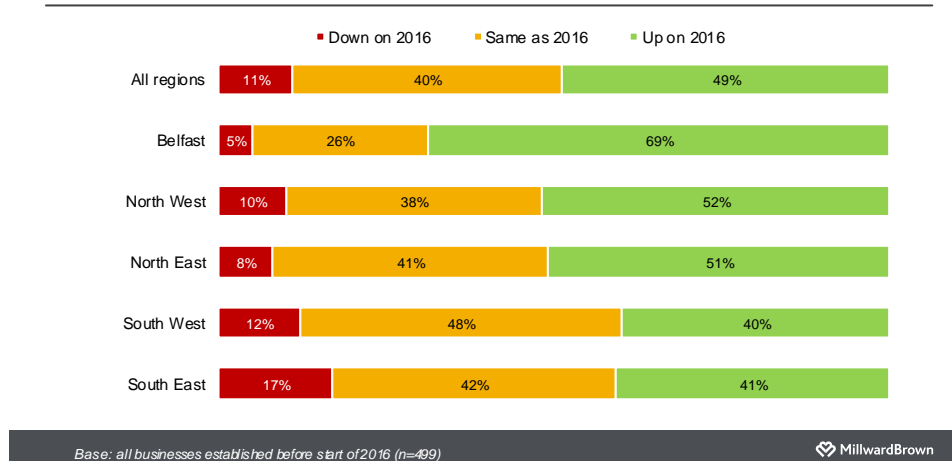
- 4.1 Operators in Belfast have enjoyed a positive 2017 thus far, with nearly seven in ten (69%) of PSA respondents having reported an increase in business.

### Steady performances across the rest of the country

- 4.2 Over half (52% and 51%) respondents in the North West and North East respectively reported an increase in visitor levels. Those who reported a decrease in those areas (10% and 8%) are fewer than at this stage the year before (23% and 10%).
- 4.3 The South West was up on balance, with more respondents having reported an increase in visitor volumes (40%) than did so at this time last year (32%). Simultaneously the ones that reported a decrease have shrunk from 30% to less than half of that (12%).
- 4.4 More respondents in the South East are reporting that visitor numbers have stayed the same year-on-year (42%) than for the same period in 2016 (28%).

## All Sectors by Region

How does the volume of your overall business / bed nights to date this year compare with the same period last year? (All sectors)



The above chart illustrates the business performance by region for all sectors

### Strong performance for Belfast

4.5 When the regional figures are based on all sectors, not just the PSA results, Belfast performed just as strongly, with approximately seven in ten (69%) having reported an increase in business in the first nine months of 2017.

4.6 This figure is a considerable improvement on that reported at the same point last year (49%).

### Consistently positive results for other regions

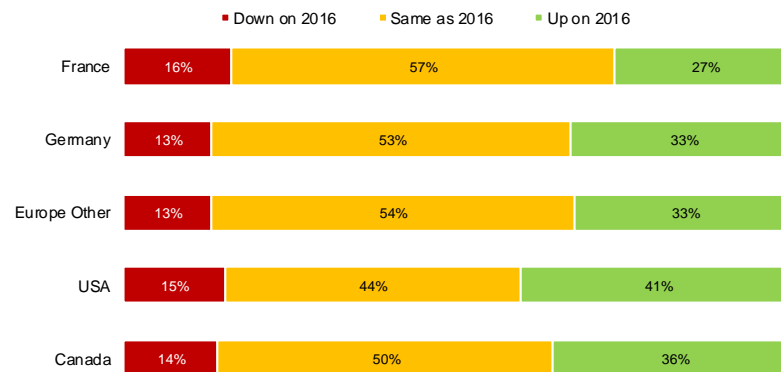
4.6 Over half (52% and 51%) of respondents in the North West and North East reported an increase in 2017, as did approximately two-fifths (40% and 41%) of respondents in the South West and South East.

4.7 With regards to all regions the number of respondents reporting an increase in visitor volumes has stayed the same (49%). However, those who have stated that the volumes are the same year-on-year have grown from approximately one-third (34%) in September 2016 to two-fifths (40%) this year.

## 5. Overseas Visitors by Market

### Paid Serviced Accommodation

How does the volume of your overall business / bed nights to date this year compare with the same period last year from each of the following markets? (PSA)



Base: n=361

MillwardBrown

The above chart illustrates the business performance by overseas market of the weighted paid serviced accommodation sector

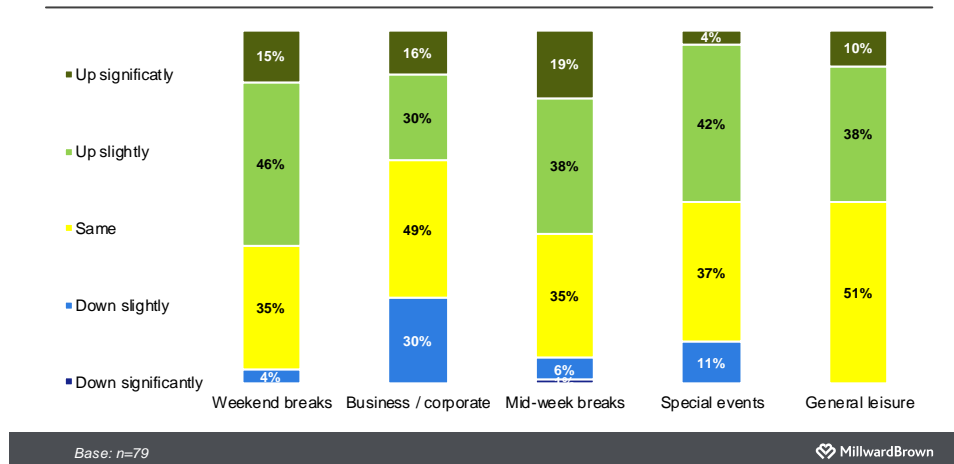
### Consistent performance for overseas markets

- 5.1 The largest proportion amongst overseas markets reported that the visitor volumes stayed the same in the first nine months of 2017, compared to the same period in 2016.

## 6. Visitor Types (Hotels)

### Hotel Visitor Types

Thinking about your business to date this year, how have each of the following performed compared with the same period last year? (*Hotels*)



The above questions were asked only to hotels

### Mid-week and weekend breaks going strong

6.1 The mid-week and weekend break markets have done particularly well, with nearly three-fifths (57%) and more than three-fifths (61%) respectively having reported an increase (either significant or slight) in 2017.

### Special events and general leisure also performing well

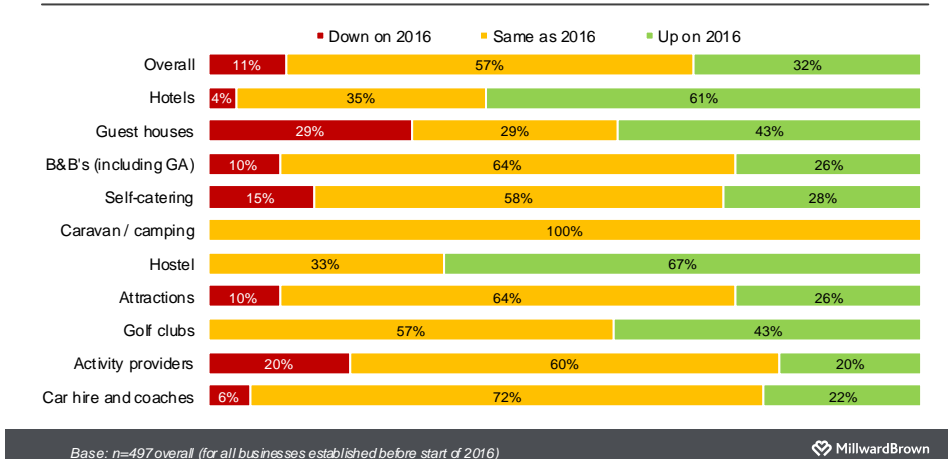
6.2 General leisure and special events also fared well, with nearly half of all hoteliers reporting an increase (46% and 48% respectively) when compared with the same period last year.



## 7. Expectations for 2017

### Overall view of expectations

How do you EXPECT the volume of your overall bednights/business to perform during the remainder of the year compared to the same period last year?

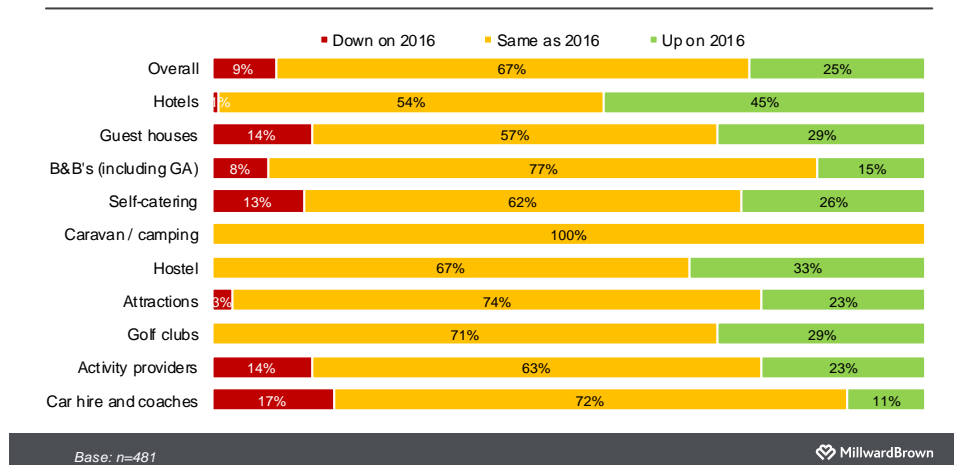


### Industry optimistic for 2017

- 7.1 Overall, tourism operators have an optimistic outlook for 2017, with nearly one-third (32%) anticipating business for the rest of 2017 to be up.
- 7.2 Amongst the accommodation providers, hotels are particularly optimistic for the remainder of the year, with three in five (61%) respondents expecting business to be up compared to the last quarter of 2016. A slight improvement on the figure reported at this stage last year (58%).
- 7.3 More than two in five (43%) of guesthouse owners expect business in that last quarter of 2017 to be up year-on-year
- 7.4 B&B and self-catering accommodation providers are more optimistic than this time last year, with more than a quarter (26% and 28% respectively) expecting business in 2017 to be an improvement on 2016. This compares to 22% and 21% in September 2016.
- 7.5 Activity providers are having a mixed outlook with one in five (20%) anticipating either an increase or a decrease in the remainder of 2017.
- 7.6 It is important to note, though, that while some predictions may be based on advanced bookings, this is not always the case and some predictions are more speculative.

## Expectations for Northern Ireland

How do you EXPECT the volume of your overall bednights \ business to perform during the remainder of the year compared to the same period last year - Northern Ireland

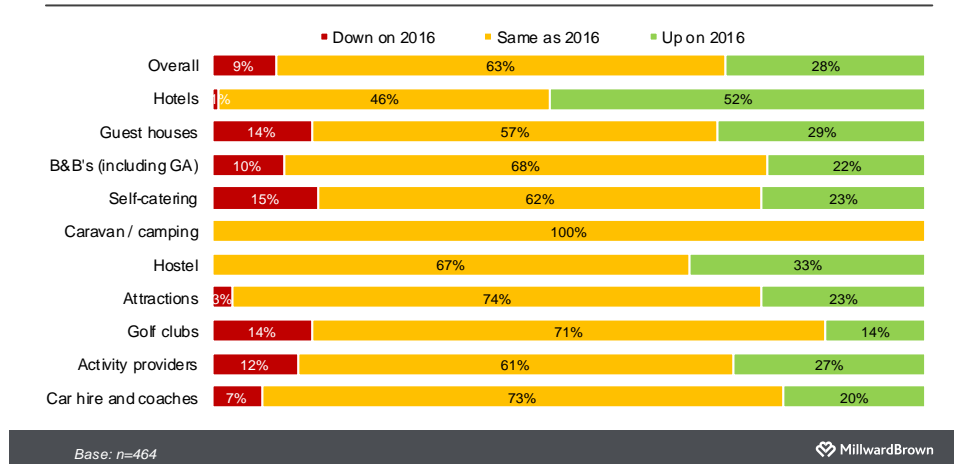


### Steady expectations overall for the domestic market

- 7.7 Overall, with a quarter (25%) expecting an increase in business, only a small number of respondents anticipate business for the remainder of 2017 to be down on the volumes for 2016. This is an improvement on last year's figures for the same period when 23% expected an increase and 15% anticipated for the figures to go down.
- 7.8 The largest proportions of most sectors expect visitor volumes from Northern Ireland to be the same in the last part of this year as they were in the same period in 2016.
- 7.9 Hotels were the most optimistic, with almost half (45%) expecting business to be up on 2016.

## Expectations for the Republic of Ireland

How do you EXPECT the volume of your overall bednights \ business to perform during the remainder of the year compared to the same period last year - Republic of Ireland

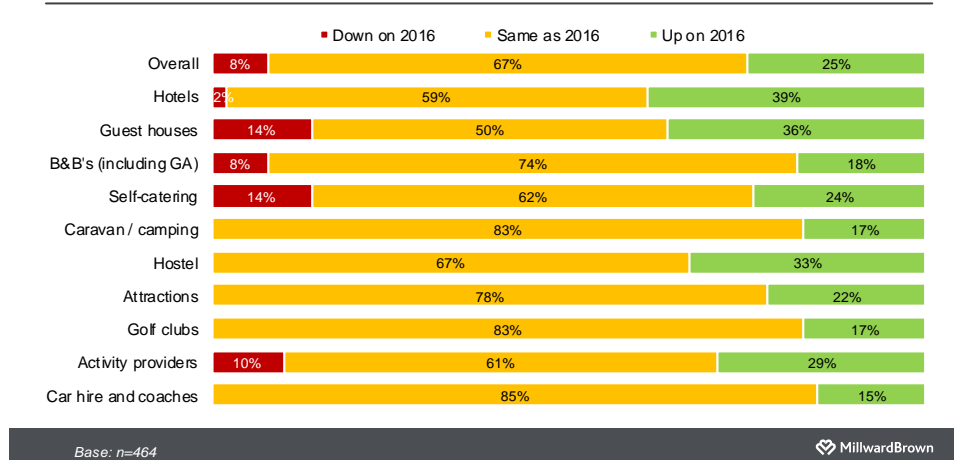


### Solid outlook for the Republic of Ireland market

- 7.10 The largest proportions of most sectors expect visitor volumes from the Republic of Ireland to be the same in the last part of this year as they were in the same period in 2016.
- 7.11 Of the accommodation providers, hotels were by far the most optimistic, with more than half (52%) anticipating business for the remainder of the year to be up on 2016.
- 7.12 Hostel providers are less pessimistic than this time last year with none of them predicting a decrease in business from the Republic of Ireland market.

## Expectations for Great Britain

How do you EXPECT the volume of your overall bednights \ business to perform during the remainder of the year compared to the same period last year - Great Britain

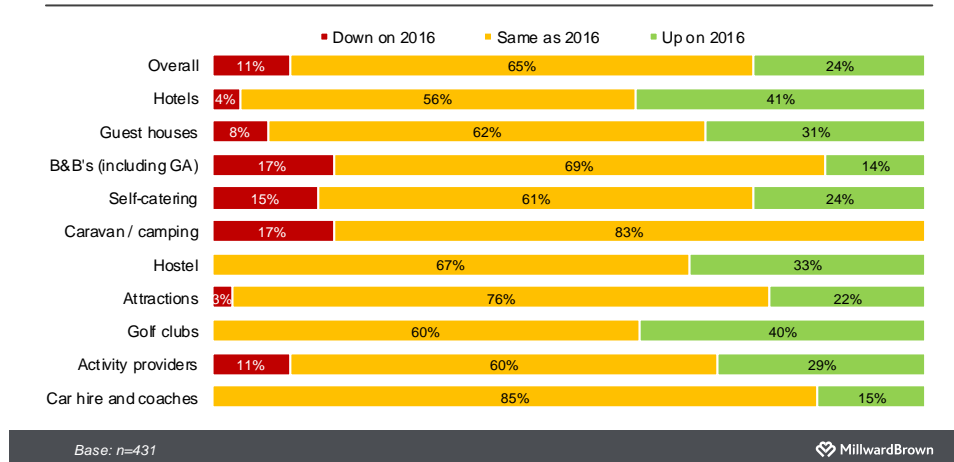


### Consistent business expected from Great Britain

- 7.13 The market from Great Britain for the remainder of the year is largely expected to be similar to the same period last year. However the balance is tipped in favour of an increase, rather than a decrease for all sectors.
- 7.14 Overall, a quarter (25%) of respondents anticipate an improvement in business from the GB market for the rest of the year, whilst nearly seven in ten (67%) expect business to stay the same.
- 7.15 Hotels are the most optimistic, with nearly two-fifths (39%) expecting business to be up on 2016, followed by guesthouse operators, with more than one-third (36%) expecting an increase for the last part of the year.

## Expectations for Overseas

How do you EXPECT the volume of your overall bednights \ business to perform during the remainder of the year compared to the same period last year - Other Overseas

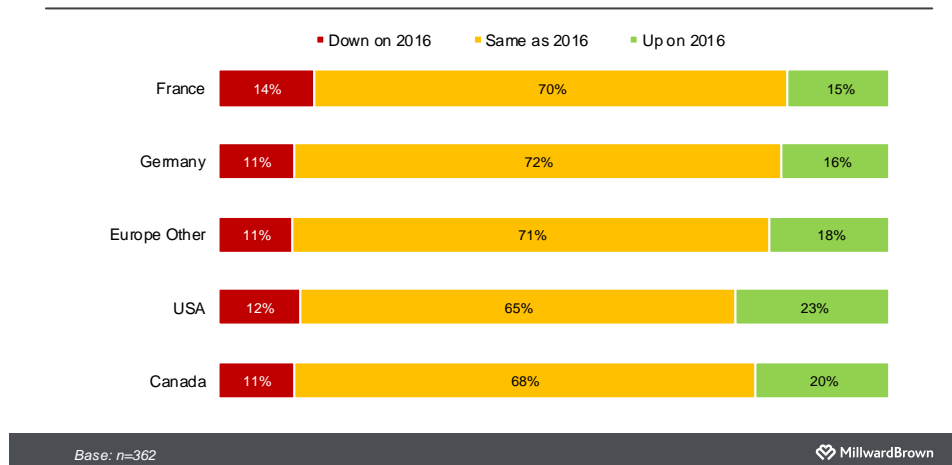


### Outlook for overseas market similar to that of Great Britain market

- 7.16 Expectations for the overseas market are similar to those of the Great Britain market, with approximately a quarter (24%) of respondents expecting business for the rest of 2017 to be up compared to that time in 2016.
- 7.17 Hotels are again the most optimistic, with just above two-fifths (41%) expecting business to be up on 2016. Golf clubs are more optimistic for the overseas market with two in five (40%) anticipating business for the rest of the year to be higher than 2016 and none expecting a decrease.
- 7.18 With the exception of B&Bs and Caravan or camping providers, respondents from all sectors were more likely to sway toward the positive side, especially so for guest houses, hostels, attractions, golf clubs, activity providers and car hire or coaches.

## Overseas Expectations by country (PSA only)

How do you expect the volume of your overall business / bed nights to perform during 2017 compared to 2016 from each of the following markets? (PSA)



The above chart illustrates the expected business performance by overseas market of the weighted paid serviced accommodation sector

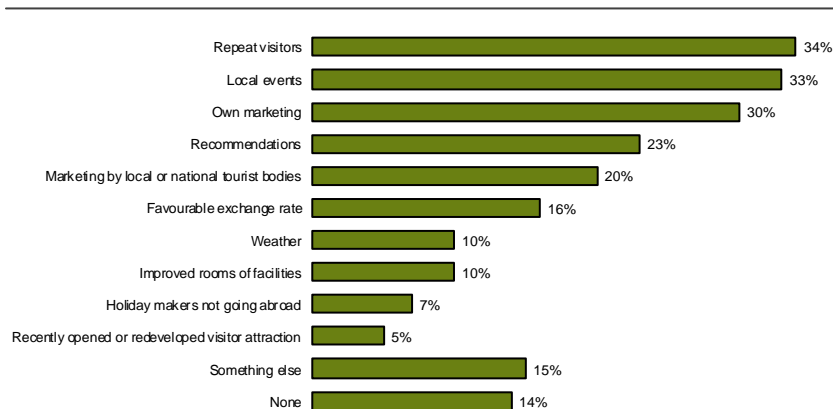
### Overseas market steady

- 7.19 The majority of respondents from the weighted paid serviced accommodation sector expected their business from overseas to perform on par with 2016 for the remainder of the year.
- 7.20 The USA was most optimistic if only marginally. Nearly a quarter expect visitor volumes to increase (23%) during the remainder of the year compared to the same period last year.
- 7.21 France has become slightly more challenging compared to this time last year with almost as many respondents expecting an increase in visitor volume (15%) as those who expect the opposite (14%).

## 8. Positive Factors in 2017

### Positive Factors

What were the main POSITIVE factors affecting your business this year?



Base: All respondents n=499

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### Repeat visitors key

- 8.1 Repeat visitors was the most frequently cited positive factor affecting tourism businesses, with around a third (34%) of all respondents having mentioned it.
- 8.2 This factor seemed to be particularly important for self-catering providers (41%).

### Local events can draw visitors

- 8.3 One-third of the sample (33%) stated local events as a positive factor affecting their business. Events in the local area are believed to encourage visitors to come to Northern Ireland.

### Recommendations and own marketing important

- 8.4 Approaching one-third and one quarter of all respondents respectively felt that their own marketing (30%) and recommendations (23%) were positive factors for their businesses.

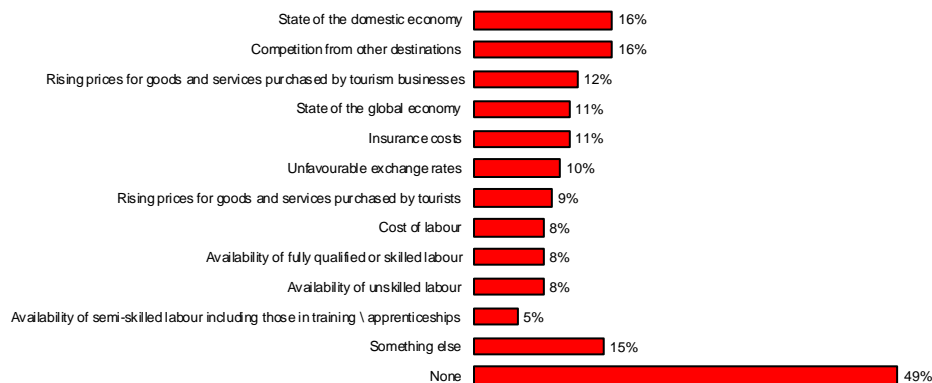
### Other positive factors

- 8.5 Marketing by local or national tourism bodies was the fifth most frequently cited positive factor (20%) affecting tourism businesses.
- 8.6 Around one in seven (16%) cited the favourable exchange rate as a benefit for their business.

## 9. Issues of Concern in 2017

### Issues of Concern

What were the main ISSUES OF CONCERN, if any, affecting your business this year?



Base: All respondents n=495

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### More respondents without concerns

9.1 Nearly half of the respondents (49%) cited no issues of concern for their business in September 2017. In comparison to this period last year this is a significant improvement, when approximately one-third (36%) could not think of any issues.

### The economy remains the main issue

9.1 The economy was seen as the main issue of concern for respondents, with just over one in seven (16%) citing the domestic economy and more than one in ten (11%) mentioning the global economy as areas of concern. However those numbers dropped in comparison to this time last year: 19% and 14% respectively.

### Competition from other destinations a concern

9.2 Around one in seven (16%) tourism businesses reported competition from other destinations as a concern for their business.