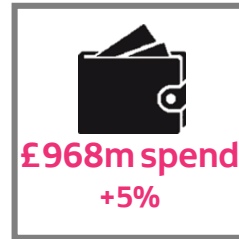


Tourism Performance Jan to Dec 2018 – At a Glance

(Source: NISRA)

Tourism estimates for 2018 suggest:

- NI welcomed 5m visitors, who spent a record breaking £968m (£42m more compared with 2017)
- Some £2.7m was spent on average each day during Jan-Dec 2018 (up from £2.5m in 2017)
- Nights were down by 3%, with significant increases in ROI nights (+44%) offset by declines for all other markets except GB, which remained flat
- Strong growth was evident for business trips as well as trips to visit friends/relatives
- Holiday trips declined slightly due to fewer NI residents holidaying at home. ROI and GB & Other Overseas holiday trips grew by 7% and 12% respectively
- NI attracted a previously unsurpassed 2.8m overnight visitors from outside NI. Growth was largely driven by the ROI market (+23%). GB and other overseas trips increased by 2%
- Following strong growth in 2017, domestic trips remained flat in 2018, with NI residents taking more trips to the ROI and overseas. However, NI residents spent more on their domestic trips in 2018 (+11%)
- The additional £42m in overall spend was attributable to the closer to home markets (GB, NI and ROI), with the strong exchange rate possibly encouraging ROI residents to spend more
- Visits to NI's headline attractions (Giant's Causeway and Titanic Belfast) increased by 5% compared with 2017
- 128 cruise ships docked in NI ports in 2018, up from 112 in 2017
- 2018 was a record year for NI hotels in terms of room and bed sales (hotel stock increased significantly during the year), with Q1 2019 figures showing continued growth in sales
- Overall, industry feedback suggests that businesses are generally optimistic about 2019 performance

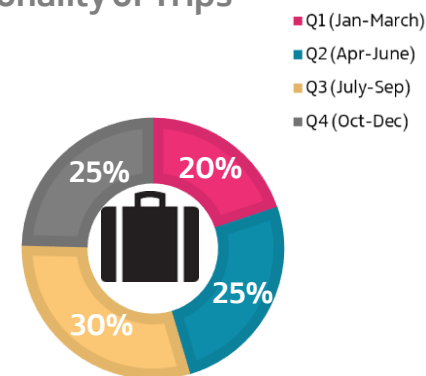


All overnight visitors to NI 2014-2018

Year	Trips (000s)	Nights (000s)	Spend (£m)	Average spend per trip	Average spend per night	Average length of stay (days)
2014	4,513	15,082	745	£165	£49	3.3
2015	4,532	15,471	764	£169	£49	3.4
2016	4,571	15,175	850	£186	£56	3.3
2017	4,851	16,866	926	£191	£55	3.5
2018	4,997	16,296	968	£194	£59	3.3
Change 2017/18	+3%	-3%	+5%	+2%	+8%	-6%

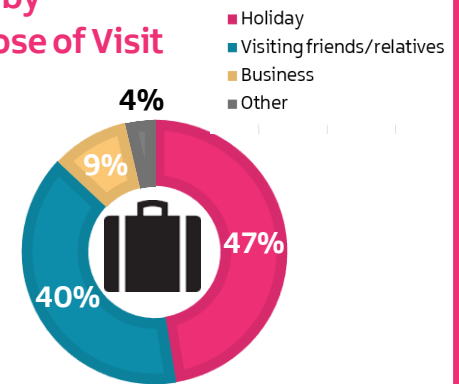
Percentage change is based on unrounded figures

Seasonality of Trips



1 Almost one third **all overnight trips taken in NI** in 2018 were enjoyed during the peak period (July-Sep)

Trips by Purpose of Visit



1 Almost half **all overnight trips taken in NI** were holiday trips and four out of **2** 10 were to visit friends and relatives

Tourism Performance 2018 – Main Markets Overview

(Source: NISRA)

All overnight visitors to NI by main market 2018

Indicator	NI	ROI*	GB	Other Overseas	Total Out of State
Trips (000s)	2,188	591	1,425	794	2,809
Nights (000s)	4,520	1,506	5,734	4,536	11,776
Spend (£m)	299	108	327	233	669
Average spend per trip	£137	£183	£230	£294	£238
Average spend per night	£66	£72	£57	£51	£57
Average length of stay (days)	2.1	2.5	4.0	5.7	4.2

Purpose of visit by main market 2018 (% trips)

Holiday	60%	43%	25%	56%	37%
VFR	31%	38%	57%	35%	46%
Business	5%	7%	17%	8%	13%
Other	3%	13%	1%	2%	4%

*2018 figures relating to ROI overnight trips should be treated with some caution

NI market accounted for:

- 44% of all overnight trips taken in NI
- 28% of all NI nights
- 31% of all NI spend

ROI market accounted for:

- 12% of all overnight trips taken in NI
- 9% of all NI nights
- 11% of all NI spend

GB market accounted for:

- 29% of all overnight trips taken in NI
- 35% of all NI nights
- 34% of all NI spend

Other Overseas market accounted for:

- 16% of all overnight trips taken in NI
- 28% of all NI nights
- 24% of all NI spend

The closer to home markets (NI and ROI) accounted for 56% of all overnight trips taken in NI in 2018, and over two fifths of total spend

The ROI market performed exceptionally well in 2018, with double digit percentage growth evident and record levels achieved for each key performance measure

Main Markets 2017/18 change (%)

Market	Trips	Nights	Spend
NI	No change	↓ 13	↑ 11
RoI	↑ 23	↑ 44	↑ 20
GB	↑ 2	No change	↑ 3
Other Overseas	↑ 2	↓ 7	↓ 6
Out of State	↑ 6	↑ 1	↑ 2

Percentage change is based on unrounded figures

Tourism Performance 2018 – Mainland Europe

(Source: NISRA)

Mainland Europe visitors to NI by country 2018

Indicator	France	Germany	Netherlands	Italy	Spain	Other Europe	TOTAL
Trips (000s)	54	71	29	24	35	120	333
Nights (000s)	312	393	120	112	248	759	1,945
Spend (£m)	12.6	15.2	7.6	4.9	9.3	32.8	82.5
Average spend per trip	£234	£216	£263	£201	£264	£274	£248
Average spend per night	£40	£39	£63	£44	£37	£43	£42
Average length of stay (days)	5.8	5.6	4.1	4.6	7.1	6.3	5.8

Purpose of visit by country 2018 (% trips)

	France	Germany	Netherlands	Italy	Spain	Other Europe	TOTAL
Holiday	59%	66%	55%	74%	36%	33%	49%
VFR	31%	19%	32%	20%	59%	49%	37%
Business & Other	11%	15%	13%	6%	5%	18%	13%

Mainland Europe accounted for:

7% of all overnight trips taken in NI

12% of all NI nights

7% of all overnight holiday trips taken in NI

9% of all NI spend

French market accounted for:



- 16% of all Mainland European trips taken in NI
- 19% of all Mainland European holiday trips taken in NI
- 16% of all Mainland European nights
- 15% of all Mainland European spend

German market accounted for:



- 21% of all Mainland European trips taken in NI
- 28% of all Mainland European holiday trips taken in NI
- 20% of all Mainland European nights
- 18% of all Mainland European spend

Main Markets 2017/18 change (%)

Market	Trips	Nights	Spend
France	↓ 13	↓ 27	↓ 18
Germany	↑ 7	↓ 12	↓ 5
Netherlands	↓ 1	↓ 8	↓ 15
Italy	↔ No change	↔ No change	↔ No change
Spain	↓ 24	↓ 32	↓ 28
Other Europe	↓ 10	↓ 14	↓ 26
Total	↓ 8	↓ 18	↓ 19

Percentage change is based on unrounded figures

Tourism Performance 2018 – North America & Other Overseas (Source: NISRA)

North America & Other Overseas visitors to NI by country 2018

Indicator	USA	Canada	TOTAL NORTH AMERICA	Australia	New Zealand	Other	TOTAL OTHER OVERSEAS
Trips (000s)	237	66	303	63	9	86	158
Nights (000s)	1,127	419	1,546	456	52	537	1,044
Spend (£m)	72.7	18.8	91.5	20.5	2.2	36.7	59.4
Average spend per trip	£307	£285	£302	£325	£250	£426	£376
Average spend per night	£64	£45	£59	£45	£43	£68	£57
Average length of stay (days)	4.8	6.4	5.1	7.2	5.8	6.2	6.6

Purpose of visit by country 2018 (% trips)

	USA	Canada	TOTAL NORTH AMERICA	Australia	New Zealand	Other	TOTAL OTHER OVERSEAS
Holiday	62%	60%	62%	52%	53%	61%	57%
VFR	30%	37%	32%	42%	47%	27%	34%
Business & Other	7%	3%	6%	5%	0%	12%	8%

USA market accounted for:



- 78% of all North American trips taken in NI
- 79% of all North American holiday trips taken in NI
- 73% of all North American nights
- 79% of all North American spend

Australian market accounted for:



- 40% of all Other Overseas trips taken in NI
- 37% of all Other Overseas holiday trips taken in NI
- 44% of all Other Overseas nights
- 35% of all Other Overseas spend

Main Markets 2017/18 change (%)

Market	Trips	Nights	Spend
USA	↑21	↑9	↑22
Canada	↑8	↑11	↓6
Australia	↑12	↑2	↓3
New Zealand	↑25	↑9	↑7
Other	↓10	↓10	↓14

Percentage change is based on unrounded figures

North America accounted for:

- 6% of all overnight trips taken in NI
- 8% of all overnight holiday trips taken in NI
- 9% of all NI nights
- 9% of all NI spend

Other Overseas accounted for:

- 3% of all overnight trips taken in NI
- 4% of all overnight holiday trips taken in NI
- 6% of all NI nights
- 6% of all NI spend