

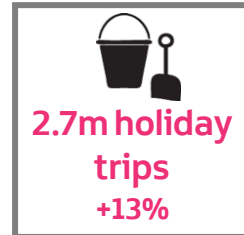
Tourism Performance Jan to Dec 2019 – At a Glance

(Source: NISRA)

Tourism estimates for 2019 suggest:

- NI welcomed 5.3m visitors, who **spent a record breaking £1bn** (£36m or 4% more compared with 2018).
- Some £2.7m was spent on average each day during Jan-Dec 2019 (+4% compared with 2018).
- Nights remained consistent with the number of nights in 2018.
- The growth in trips in 2019 was largely driven by holidays, as we attracted 309,000 more holiday visitors (+13%) compared with 2018. The closer to home markets (NI and ROI) increased by 16%, while holiday visitors from GB and Other Overseas grew by 7%.
- Overnight visitors from outside NI exceeded 3m for the first time ever. Growth was largely driven by the ROI market (+28%). GB and other overseas trips increased by 1%.
- NI residents took more trips, notably holidays, in NI. They also took additional trips to ROI, GB and Other Overseas.
- The Giant's Causeway remained NI's number one visitor attraction in 2019, welcoming 1m visitors.
- 167 cruise ships docked in NI ports in 2019, up from 128 in 2018.
- 2019 was a record year for NI hotels in terms of room and bed sales, with occupancy showing slight declines, impacted by additional stock.
- 2019 tourism employee jobs figures show a 9% increase (+6,000) on 2017 to 70,803.
- Industry feedback suggested a positive start to 2020, pre-covid. Accommodation and airport statistics clearly show the devastating impact the pandemic had during the first lockdown, and the reopening period.

2019 Figures revised 14-12-23



All overnight visitors to NI 2015-2019

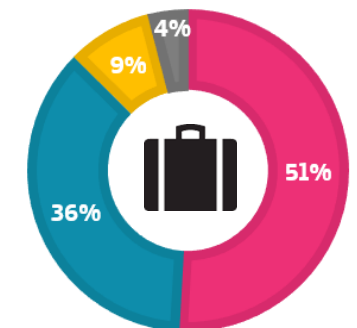
Year	Trips (000s)	Nights (000s)	Spend (£m)	Average spend per trip	Average spend per night	Average length of stay (days)
2015	4,532	15,471	764	£169	£49	3.4
2016	4,571	15,175	850	£186	£56	3.3
2017	4,851	16,866	926	£191	£55	3.5
2018	4,997	16,296	968	£194	£59	3.3
2019	5,263	16,327	1,004	£191	£62	3.1
Change 2018/19	+5%	0%	+4%	-2%	+4%	-6%

Percentage change is based on unrounded figures



Trips by Purpose of Visit

- Holiday
- Visiting friends/relatives
- Business
- Other



- Half all overnight trips taken in NI were holiday trips and almost four out of 10 were to visit friends and relatives

Tourism Performance 2019 – Main Markets Overview

(Source: NISRA)

All overnight visitors to NI by main market 2019

Indicator	NI	ROI*	GB	Other Overseas	Total Out of State
Trips (000s)	2,263	756	1,461	783	3,001
Nights (000s)	4,512	1,859	5,710	4,246	11,815
Spend (£m)	274	142	369	220	731
Average spend per trip	£121	£188	£252	£281	£244
Average spend per night	£61	£76	£65	£52	£62
Average length of stay (days)	2.0	2.5	3.9	5.4	3.9

Purpose of visit by main market 2019 (% trips)

Holiday	66%	43%	27%	58%	39%
VFR	28%	36%	52%	34%	43%
Business	2%	9%	19%	6%	13%
Other	3%	13%	1%	3%	5%

*2019 figures relating to ROI overnight trips should be treated with some caution

Out of State refers to visitors from outside NI

NI market accounted for:

- 43% of all overnight trips taken in NI
- 27% of all NI nights
- 27% of all NI spend

ROI market accounted for:

- 14% of all overnight trips taken in NI
- 11% of all NI nights
- 14% of all NI spend

GB market accounted for:

- 28% of all overnight trips taken in NI
- 34% of all NI nights
- 37% of all NI spend

Other Overseas market accounted for:

- 15% of all overnight trips taken in NI
- 26% of all NI nights
- 22% of all NI spend

The closer to home markets (NI and ROI) accounted for 57% of all overnight trips taken in NI in 2019, over two fifths of total spend, and over two thirds of holiday trips

The ROI market performed exceptionally well in 2019, with double digit percentage growth evident and record levels achieved for each key performance measure. This follows on from a very strong performance in 2018

Main Markets 2018/19 change (%)

Market	Trips	Nights	Spend
NI	↑ 3	↔ No change	↓ 9
RoI	↑ 28	↑ 23	↑ 31
GB	↑ 3	↔ No change	↑ 13
Other Overseas	↓ 1	↓ 6	↓ 6
Out of State	↑ 7	↔ No change	↑ 9

Percentage change is based on unrounded figures

Tourism Performance 2019 – Mainland Europe

(Source: NISRA)

Mainland Europe visitors to NI by country 2019

Indicator	France	Germany	Netherlands	Italy	Spain	Other Europe	TOTAL
Trips (000s)	55	65	30	20	38	130	338
Nights (000s)	305	375	154	101	247	739	1,920
Spend (£m)	12	14	9	5	9	35	84
Average spend per trip	£222	£215	£301	£232	£232	£271	£248
Average spend per night	£40	£37	£59	£47	£36	£48	£44
Average length of stay (days)	5.6	5.8	5.1	5.0	6.5	5.7	5.7

Purpose of visit by country 2019 (% trips)

	France	Germany	Netherlands	Italy	Spain	Other Europe	TOTAL
Holiday	55%	58%	60%	68%	50%	44%	52%
VFR	33%	32%	27%	12%	45%	45%	37%
Business & Other	13%	10%	13%	21%	5%	11%	11%

Mainland Europe accounted for:

6% of all overnight trips taken in NI

12% of all NI nights

7% of all overnight holiday trips taken in NI

8% of all NI spend

French market accounted for:



- 16% of all Mainland European trips taken in NI
- 17% of all Mainland European holiday trips taken in NI
- 16% of all Mainland European nights
- 14% of all Mainland European spend

German market accounted for:



- 19% of all Mainland European trips taken in NI
- 21% of all Mainland European holiday trips taken in NI
- 20% of all Mainland European nights
- 17% of all Mainland European spend

Main Markets 2018/19 change (%)

Market	Trips	Nights	Spend
France	↑ 1	↓ 2	↓ 4
Germany	↓ 8	↓ 5	↓ 9
Netherlands	↑ 4	↑ 28	↑ 19
Italy	↓ 17	↓ 10	↓ 4
Spain	↑ 9	↓ 1	↓ 4
Other Europe	↑ 8	↓ 3	↑ 7
Total	↑ 2	↓ 1	↑ 2

Percentage change is based on unrounded figures

Tourism Performance 2019 – North America & Other Overseas (Source: NISRA)

North America & Other Overseas visitors to NI by country 2019

Indicator	USA	Canada	TOTAL NORTH AMERICA	Australia	New Zealand	Other	TOTAL OTHER OVERSEAS
Trips (000s)	212	68	280	68	10	87	165
Nights (000s)	968	373	1,341	416	79	491	985
Spend (£m)	61	18	79	25	3	30	57
Average spend per trip	£287	£263	£281	£362	£323	£338	£347
Average spend per night	£63	£48	£59	£59	£42	£60	£58
Average length of stay (days)	4.6	5.5	4.8	6.1	7.7	5.6	6.0

Purpose of visit by country 2019 (% trips)

	USA	Canada	TOTAL NORTH AMERICA	Australia	New Zealand	Other	TOTAL OTHER OVERSEAS
Holiday	63%	59%	62%	68%	34%	61%	62%
VFR	30%	38%	32%	29%	65%	28%	31%
Business & Other	8%	2%	6%	3%	1%	10%	7%

USA market accounted for:



- 76% of all North American trips taken in NI
- 77% of all North American holiday trips taken in NI
- 72% of all North American nights
- 77% of all North American spend

Australian market accounted for:



- 41% of all Other Overseas trips taken in NI
- 45% of all Other Overseas holiday trips taken in NI
- 42% of all Other Overseas nights
- 43% of all Other Overseas spend

Main Markets 2018/19 change (%)

Market	Trips	Nights	Spend
USA	↓ 11	↓ 14	↓ 16
Canada	↑ 3	↓ 11	↓ 5
Australia	↑ 7	↓ 9	↑ 20
New Zealand	↑ 16	↑ 53	↑ 50
Other	↑ 2	↓ 9	↓ 19

Percentage change is based on unrounded figures

North America accounted for:

- 5% of all overnight trips taken in NI
- 6% of all overnight holiday trips taken in NI
- 8% of all NI nights
- 8% 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