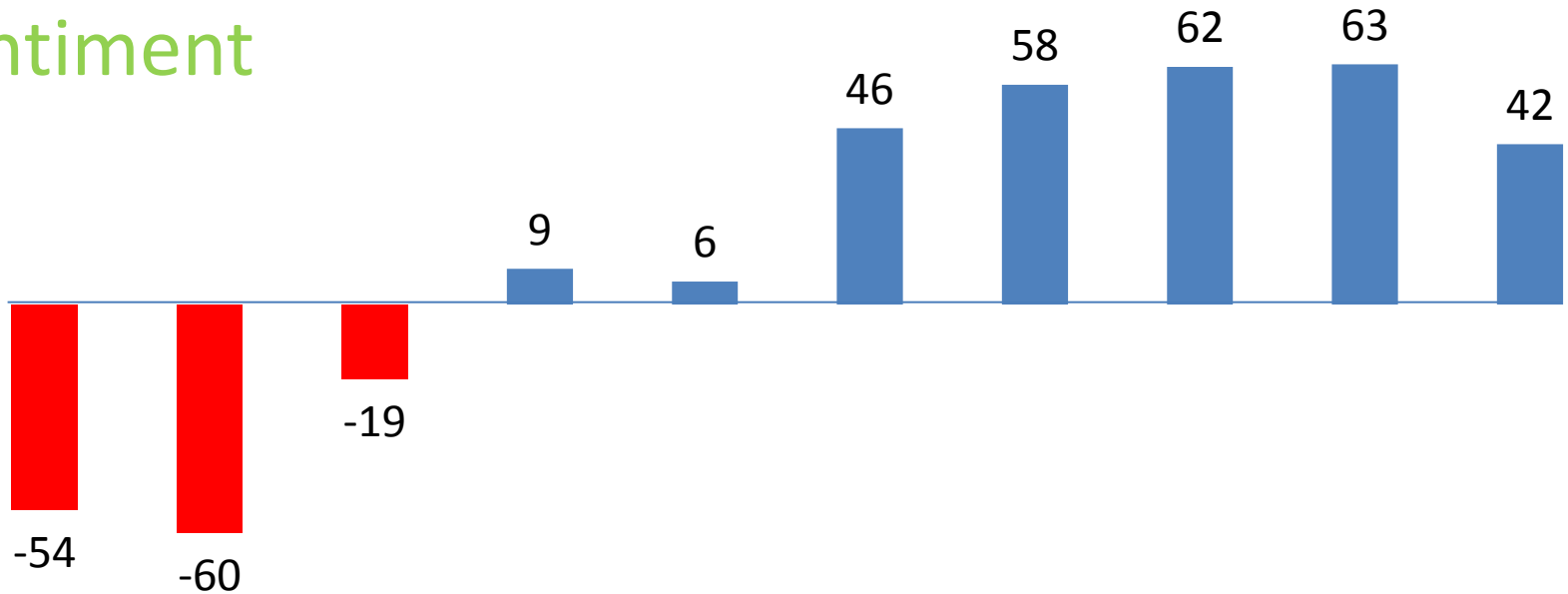


## Business sentiment index: September 2008 - 2017

% of Accommodation providers: Year to date performance and Prospects for the rest of the year

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Up	14	15	28	39	41	60	68	70	72	57
Same	18	11	25	31	25	27	21	23	19	29
Down	68	74	47	30	35	13	11	7	9	15

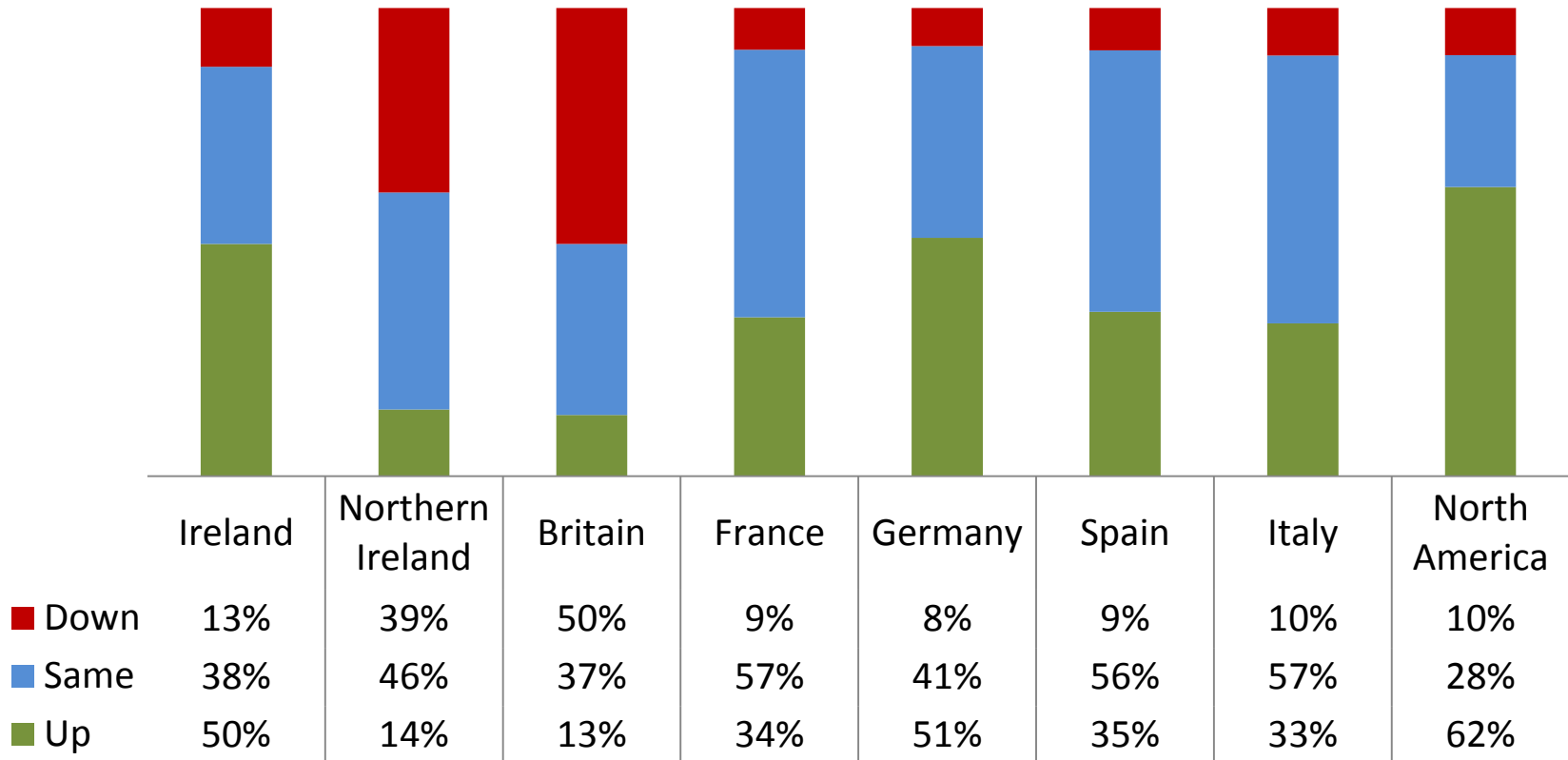
## Net Sentiment



Overall, the industry is positive regarding this year's performance. However, a sense of caution is emerging, with almost a third of accommodation providers maintaining the status quo in 2017 and 15% expressing a negative sentiment.

## YEAR TO DATE PERFORMANCE BY SOURCE MARKETS

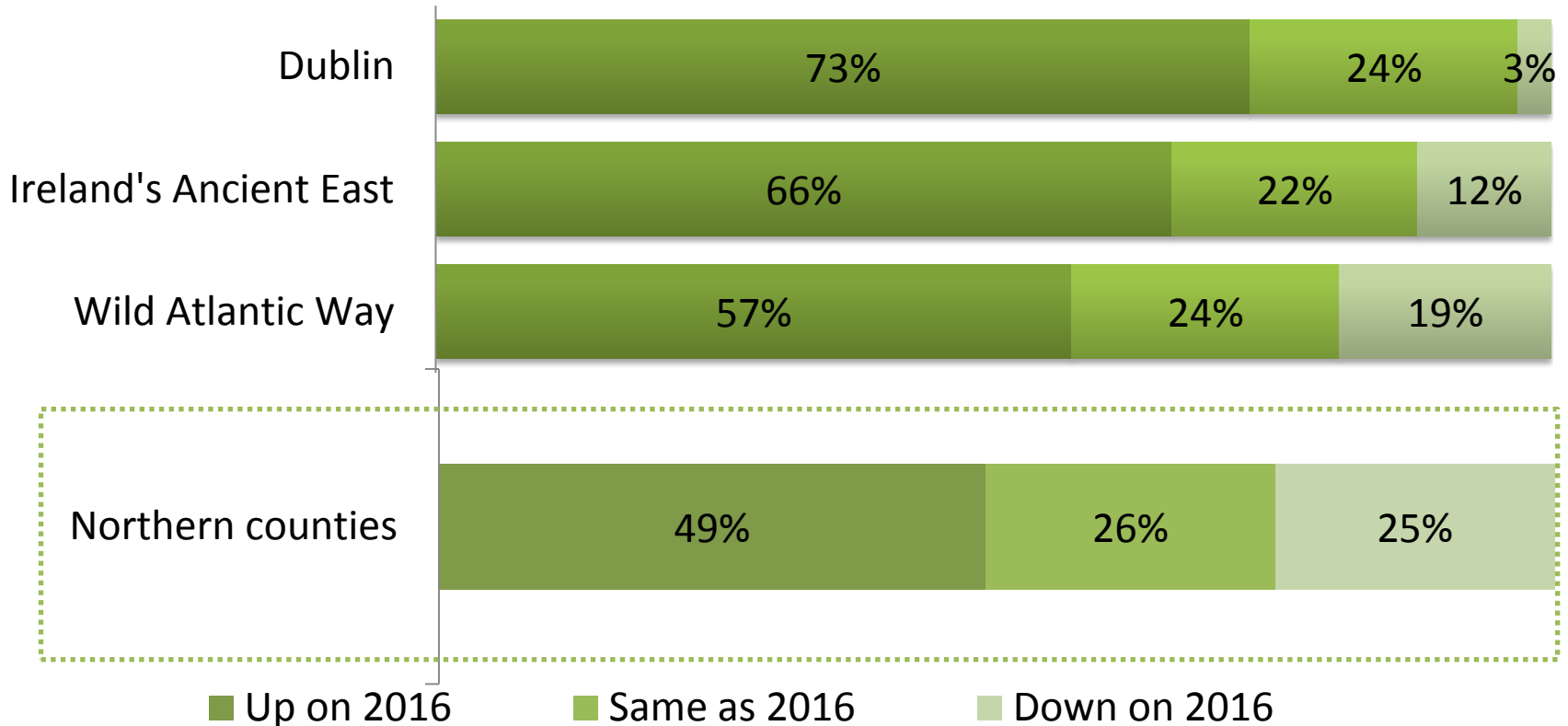
% of hotels/guesthouses/b&bs saying business is up/same/down on 2016.



Paid serviced accommodation providers report a very mixed performance by market so far this year. North America, Germany and Ireland are the strongest performers. France, Spain and Italy have also done well. Britain and Northern Ireland were down on balance.

## YEAR TO DATE PERFORMANCE

% of hotels/guesthouses/B&Bs saying business is up/same/down on 2016.



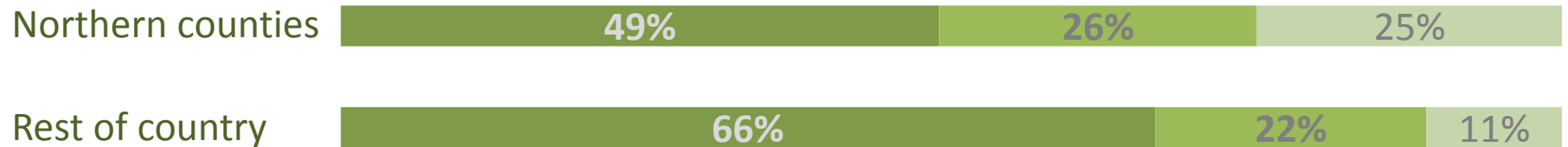
There is a distinct divergence in business performance across the three programme areas. The highest proportion of businesses reporting a downturn are located along the Wild Atlantic Way. Enterprises in northern counties, while positive overall are more likely to have seen a downturn in business.

Northern counties = Cavan, Donegal, Leitrim, Longford, Louth, Mayo, Monaghan, Sligo

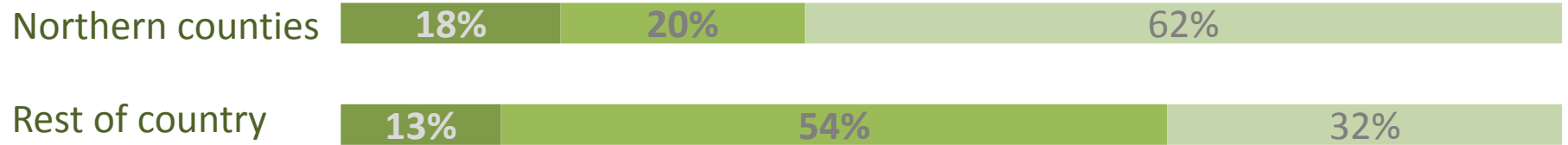
## PERFORMANCE IN NORTHERN COUNTIES VS THE REST OF THE COUNTRY

% of hotels/guesthouses/B&Bs saying business is up/same/down on 2016.

### YEAR TO DATE PERFORMANCE



### PERFORMANCE FROM NORTHERN IRELAND



### PROSPECTS FOR THE REST OF THE YEAR



■ Up ■ Same ■ Down

Product providers in the northern counties have not seen as positive a year so far as their counterparts elsewhere. This is particularly evident when looking at the levels of business from Northern Ireland, almost two thirds of enterprises in northern counties have seen a drop compared to a third in the rest of the country.

Northern counties = Cavan, Donegal, Leitrim, Longford, Louth, Mayo, Monaghan, Sligo

## PERFORMANCE IN NORTHERN COUNTIES – EXCHANGE RATE IMPACT

% of hotels/guesthouses/B&Bs

Q “Have you seen a Sterling exchange rate impact on your business so far this year?”

68%

44%

% answering "yes"

Q “What are the main issues of concern affecting your business this year?”

63%

38%

mentioning €/£ as a concern

■ Northern Counties    ■ Rest of Country

Northern businesses are also more conscious and concerned about a weakened sterling with almost 70% saying they have been affected by exchange rates and six in ten mentioning it as a concern.

Northern counties = Cavan, Donegal, Leitrim, Longford, Louth, Mayo, Monaghan, Sligo