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2022 Highlights

Cardholder spend from all markets in 2022



Total tourism-related spend in NI increased by 16% during Jan to Dec 2022, compared to the same period in 2019.




Spend in NI bars from all markets increased by 52% and spend in restaurants increased by 4%.



Spend on NI accommodation by all markets also increased on 2019 levels (up 8%), suggesting increased numbers of overnight visitors.

Focus on the ROI Market

CSO statistics indicate ROI to NI performance during the first nine months of 2022 was extremely positive in comparison to the same period in 2019, **with spend up by more than two-thirds.**

ROI to NI Performance Jan-Sept 2019 vs Jan-Sept 2022		
 Trips	 Nights	 Spend
+53%	+46%	+68%

ROI to NI trips, nights and spend during the first nine months of 2022 **have already exceeded** the entire trips, nights and spend in 2019.



ROI Cardholder spend



Total tourism-related spend in NI from ROI residents increased by 73% during Jan to Dec 2022, compared to the same period in 2019.

Spend in NI bars from the ROI market increased by 148% and spend in restaurants increased by 63%.



Spend on NI accommodation by this market also increased on 2019 levels (up 54%), suggesting increased numbers of overnight visitors.

ROI First Timers

Tourism NI's consumer sentiment research suggests:

approximately

1/2




of ROI visitors to NI during 2022 were
first time leisure visitors

ROI Visitor Experience 2022

- Results point to continued **high levels of ROI and domestic visitor volumes** in 2022, with over 9 in 10 respondents in each market saying their **trip matched or exceeded expectations**.
- Of those ROI consumers who visited in 2022, **over 6 in 10** said they would be likely to return in 2023.
- When asked why they would return in 2023, most focused on **atmosphere, food & drink, and value**.



NI Hotel Performance in 2022

NI Hotel Performance (Jan-Dec 2022 v Jan-Dec 2019)		
 Room Occupancy	 ADR	 RevPAR
+1 percentage point	+28%	+29%

- STR data suggests that Northern Ireland's hotel performance in 2022 was better than anticipated, with the industry experiencing particularly strong performance in the final quarter of the year.
- NI hotel room occupancy for January-December year-to-date 2022 was marginally above the same period in 2019.
- ADR and RevPAR have grown significantly on 2019 levels.



NI Access in 2022

Northern Ireland Air & Sea Access in 2022

	2022	% Change vs 2019
 Air Passenger Flow	6.6m	-29%
 Ferry Passenger Traffic	2.1m	+3%

Over 6.6m passengers flowed through NI's three main airports in 2022. This is 29% lower than pre-pandemic levels but is more than double the air passenger flow in 2021.

NI's scheduled seat capacity on flights in June 2023 is at 104% of June 2019 levels.

There were over 2.1m passengers on ferries to and from NI in 2022, representing a 3% increase on 2019.



Trends & Consumer Sentiment



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Travel Trends



Value for Money

Despite the current economic uncertainty, there is still a strong desire for travel.

Travellers will prioritise a trip that delivers strong value for money, however, will still expect high quality experiences.



Relaxation and Escapism

Relaxation and getting away from it all are key reasons behind travel in 2023.

Pet-friendly travel has also emerged as a new motivation for consumers.



Authentic Experiences

Travel is a vehicle for discovering different cultures and perspectives. In 2023, there is rising interest in unique and authentic experiences.



Sustainable Tourism

There is more to the topic of sustainability than just the environmental focus. The social aspect is equally important and, given the rising costs facing tourists and businesses, the economic aspect is now more crucial than ever.



Seamless Travel

Consumers want a hassle-free experience when taking a trip. They are interested in how the latest digital innovations can enhance their experience but still expect high quality, human-led hospitality.

Consumer Perceptions

While there is still a sense of worry about the cost-of-living, many consumers are **relatively optimistic**.

- Around half agreed they "intend to keep doing things I enjoy in 2023 even if the impact of cost-of-living increases is a concern".

Intentions indicate a generally steady performance for NI short breaks, with **relaxation** the most common motivator.

Competition from ROI and GB remains strong however, with a significant increase in those considering a longer break abroad also evident.

Both NI and ROI consumers continue to regard **NI as better value for money than GB and ROI**.



Consumer Perceptions

Most ROI consumers said they would **recommend** NI to their friends and relatives as a **great place for a holiday or short break** (80% agree).

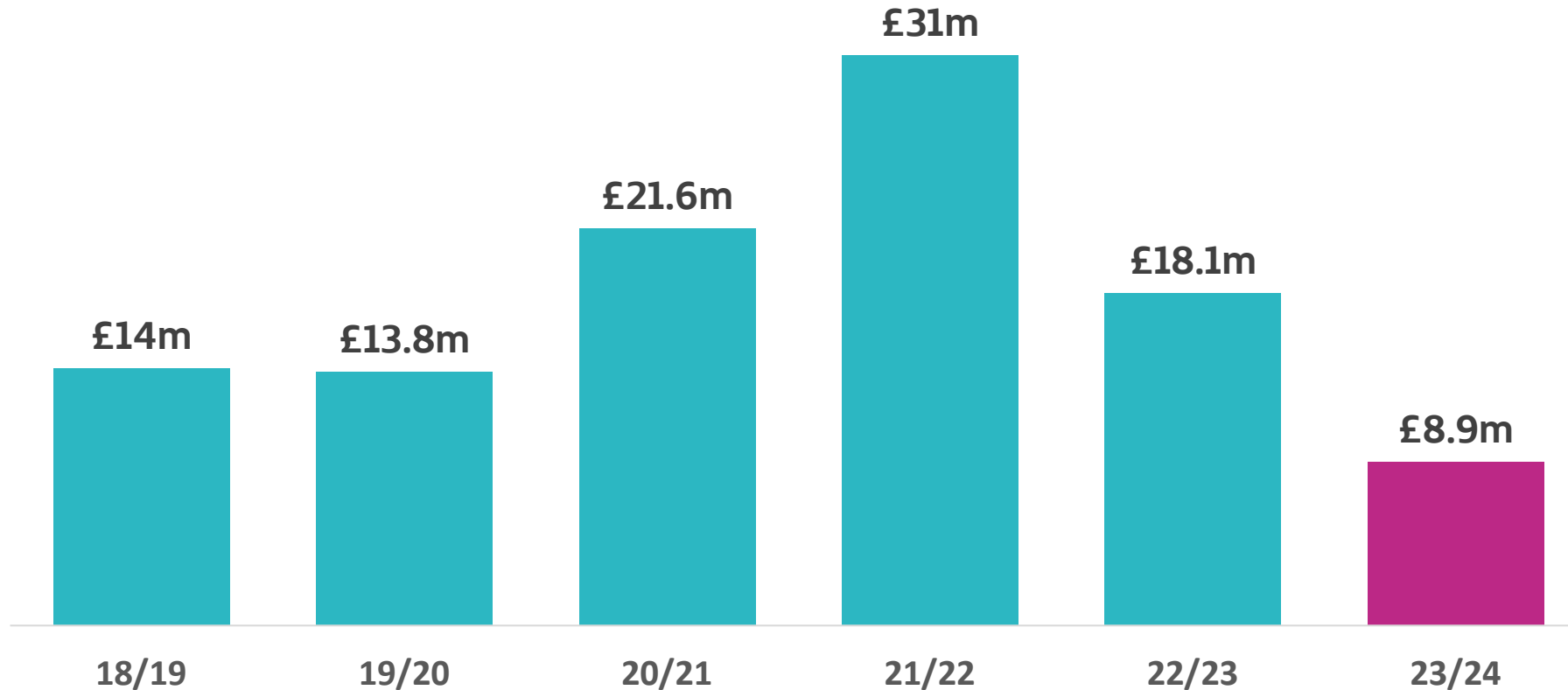
The vast majority of ROI (95%) and NI consumers (94%) who have recently visited NI for a short break or holiday said they would be **likely to return** for another short break in the future.

For those consumers who are considering a trip to NI, it is **accommodation** and the **eating experience** they are most likely to want to find out more about before booking.



Priorities for the year ahead

2023/24 Programme Budget Outlook



Source: Tourism NI 2018/19 to 2022/23, closing budgets; 2023/24 indicative budget

2023 Priority Areas

- The marketing and promotion of NI as an attractive and value for money short break destination
- Supporting Business to Business Sales
- Supporting Business Events
- Tourism Enterprise Development
- Sustainable, Authentic and Innovative Experience Development

2023 Priority Areas

- Supporting the Delivery of World Class Events
- Quality and Standards (Accommodation and Attraction Grading Schemes)
- Supporting Employment, Staff Development and Retention
- Research and Insights
- City Deals

City & Growth Deals

Belfast Region City Deal - £220m Tourism Led Regeneration Programme



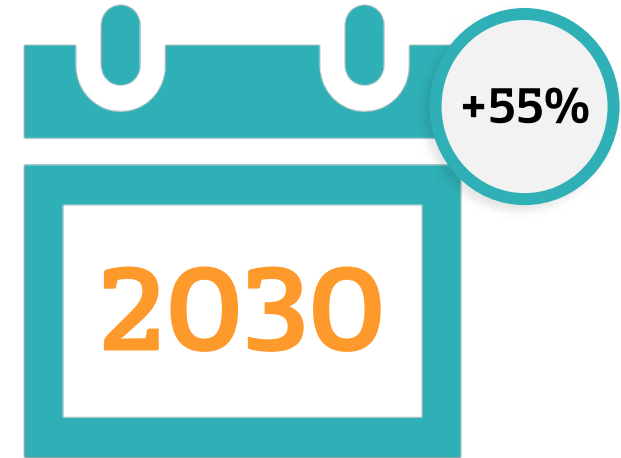
Mid South West Growth Deal

Derry City and Strabane City Deal



Outlook

By 2030, **with the right levels of support**, the number of visitors to NI from outside the island of Ireland is projected to be almost 25% higher than 2019 levels and revenue from markets outside the island of Ireland is forecast to increase by 55% above 2019 levels.



Thank you



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