

May 2023



# TOURISM 360°

2022 Performance - At a Glance



TOURISM  
NORTHERN  
IRELAND

# This Issue

---

03.

## **2022 vs 2019 Performance Dashboard**

*At a glance summary of 2022 KPIs vs 2019 equivalents*

04.

## **Republic of Ireland Visitors to NI in 2022**

*2022 saw record levels of ROI trips, nights and spend in NI*

05.

## **NI Accommodation Performance**

*Accommodation statistics on occupancy, average daily rate and revenue per available room*

07.

## **Cardholder Spend in NI**

*A look at cardholder spend on key tourism-related categories in NI*

08.

## **Online Review Analysis**

*Findings from Tourism NI's analysis of online accommodation and attraction reviews*

09.

## **Consumer Sentiment**

*Takeaways from Tourism NI's research with NI and ROI consumers*

10.

## **Access into NI**

*Data on air and sea access into NI*

## **2022 At a Glance...**

Overall the 2022 tourism picture was better than anticipated, due to strong performances from the closer to home markets, in particular the Republic of Ireland (ROI). While passenger flow through Northern Ireland's (NI) three main airports finished the year around one-quarter below the levels seen in 2019, NI's accommodation sector recovered back to 2019 levels. Throughout 2022 NI's hotel rates consistently exceeded 2019 rates.

ROI overnight trips to NI eclipsed one million for the first time in 2022, with associated spend increasing by more than two-thirds to a record breaking amount. Data also indicate positive visitor volumes from the NI domestic and Great Britain (GB) markets, and recovery of international markets, although not yet back to 2019 levels. The visitor experience appears to have remained on par with pre-pandemic times.

## **2023 Outlook**

Industry feedback indicates a positive start to 2023. While there is uncertainty around the rest of the year due to the difficult operating environment and changing economic environment, the desire to travel remains strong despite cost of living pressures, and the air access forward picture is positive. With greater competition evident from markets abroad, value for money and visitor experience will remain important drivers for 2023.

\*All data compared against 2019 equivalent.

## Access into NI



Air Passenger Flow

Source: CAA

▼ **-26%**

Scheduled Air Seat Capacity

Source: OAG

▼ **-19%**

GB Ferry Passengers

Source: Ferrystat

▲ **+3%**

## STR NI Hotel Performance



Room Occ

▲  
**+0.6pps**

RevPAR

▲  
**+28%**

ADR

▲  
**+29%**

## Online Reviews (NI Accommodation)



No. of Online Reviews

▼ **-25%**

Collated from 175 sources

Global Review Score

**89.3%**

No Change

\*GRS is indicative of visitor experience.

## Cardholder Spend



Key Tourism-related Spend (All Markets)

▲ **+16%**

## CSO – ROI Visitors to NI



Trips

▲  
**+51%**

Nights

▲  
**+42%**

Spend

▲  
**+65%**

**2022 saw record levels of ROI trips, nights and spend in NI.**

*Source: CSO – Household Travel Survey*



**1.1m**  
Trips

**+51% vs 2019**



**2.6m**  
Nights

**+42% vs 2019**



**£233m**  
Spend

**+65% vs 2019**

- Republic of Ireland to Northern Ireland performance during 2022 was extremely positive, delivering record levels of trips, nights and spend.
- ROI residents took over 1.1m overnight trips in NI, eclipsing the one million figure for the first time. **ROI to NI trips, nights and spend during 2022 have each seen increases of 51%, 42%, and 65% respectively, compared to 2019.**
- ROI staycations also saw growth across all KPIs during 2022 compared to pre-pandemic times but did not experience the same increases evident for ROI to NI trips.
- **Tourism NI's consumer sentiment research found over 9 in 10 ROI visitors to NI in 2022 said their trip matched or exceeded expectations.**



**ROI holiday visitors to NI increased by over half in 2022 vs 2019.**



**2022 saw record levels of ROI trips, nights and spend in NI.**

## At a Glance – 2022 vs 2019



**71.5% Room occupancy**

+0.6 percentage points



**ADR = £100.15**

+28%



**RevPAR = £71.63**

+29%

Average Daily Rate (ADR) - A measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold.

Revenue Per Available Room (RevPAR) – Total room revenue divided by the total number of available rooms.

## NI Hotel Performance

### NI Hotel Performance – 2022 vs 2019

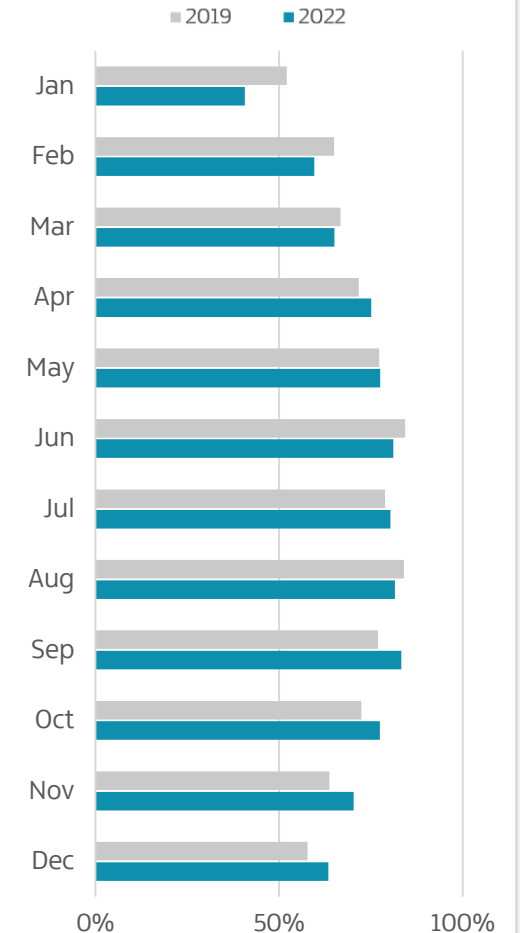
STR data indicate NI hotel performance was better than anticipated in 2022, with **room occupancy (71.5%) marginally exceeding pre-pandemic room occupancy in 2019.**

It was a slow start to the year, with January and February impacted by the Omicron variant, but occupancy levels improved in the spring and summer before finishing the year strongly.

**2022 Average Daily Rate (ADR) and Revenue per Available Room (RevPAR) each experienced increases of over one quarter.**

Looking at individual monthly performance, after a difficult first quarter, NI hotel room occupancies performed well throughout the rest of 2022. In the 9 months that make up Q2-4, only June 2022 and August 2022 failed to exceed their 2019 equivalent, with the final four months of the year experiencing particularly strong occupancy.

### NI Monthly Room Occupancy



## At a Glance – 2022 vs 2019



**37% Room occupancy**

+3 percentage points



**28% Bed occupancy**

+3 percentage points



**554,000 Room sales**

+21%



**952,000 Bed sales**

+15%

## NI GH/GA/BB Performance

### GH/GA/BB Room & Bed Occupancy

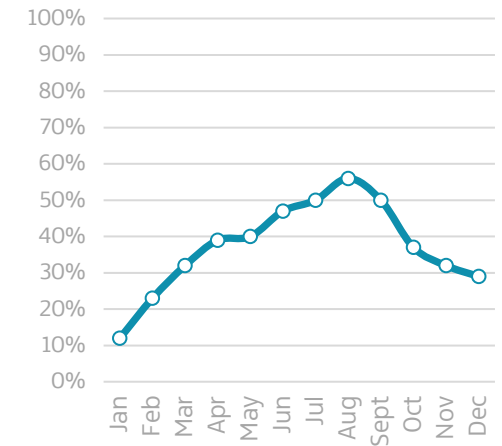
NISRA data indicate NI guesthouses, guest accommodation and bed & breakfasts (GH/GA/BB) had a positive 2022, with performance suggesting this sector progressed slightly better in its recovery than hotels. 2022 room and bed occupancy each increased by 3 percentage points compared to 2019.

Breaking this sector down further, growth in occupancy levels was driven by the guest house and guest accommodation sectors, while B&Bs experienced a 4 percentage point drop in room occupancy and no change in bed occupancy.

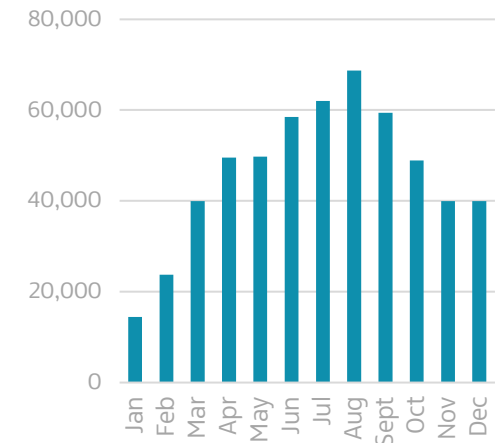
### GH/GA/BB Room & Bed Sales

NI GH/GA/BB room sales increased by more than one fifth (21%) in 2022 compared to 2019, primarily as a result of strong performance in the last four months. 2022 bed sales also exceeded 2019 levels by 15%.

### 2022 Room Occupancy



### 2022 Room Sales



## At a Glance – 2022 vs 2019

Key Tourism-Related Category Spend in NI by Market



## Cardholder Spend in NI

### Key Tourism-Related Spend

Tourism NI carried out analysis of cardholder spend data in NI during January to December 2022 v the same period in 2019, focusing on three key tourism-related categories: bars/taverns; eating places & restaurants, and hotels/motels/resorts.

Analysis indicates a **16% increase in key tourism-related spend compared to 2019**. Spend on hotels/motels/resorts increased by 8% during the same time period.

NI domestic cardholder spend on the key tourism-related categories outlined above rose by 14% in 2022 vs 2019, while Great Britain (GB) spend saw an increase of 5%. **ROI experienced the biggest increase on pre-pandemic levels (+73%)**.

We are **starting to see a recovery for international markets**, following decreases in spend in early 2022. For example, in Q1 2022, international cardholder spend in NI declined by over 35%. However, January to December 2022 analysis saw a 6% increase

All Market Spend in NI by Tourism Related Category	% Change vs 2019
Bars/Taverns	+52%
Eating Places & Restaurants	+4%
Hotels/Motels/Resorts	+8%
<b>Total Jan-Dec 2022</b>	<b>+16%</b>

compared to the same period in 2019, driven primarily by longer haul markets such as North America and Australia.

#### Background:

*Due to the market share of the card company, and because accommodation can be booked in advance through a third-party platform rather than through a local business or branch, the spend data should be seen as indicative of trends rather than providing actual spend figures.*

*Data is sometimes withheld to protect merchant and cardholder confidentiality. **It is likely that some growth can be attributed to the continued preference for card payments as opposed to cash, linked to the pandemic.***

## At a Glance – 2022 vs 2019



Number of NI accommodation online reviews down 25%



Number of NI attraction online reviews down significantly



NI accommodation – Global Review Score (GRS)

no change



NI attractions – GRS score  
+0.3 percentage points

Global Review Score (GRS) is a key benchmarking metric. It is calculated by an algorithm that generates a percentage from 0-100, based on review data.

## Online Review Analysis

### NI Accommodation

Tourism NI analysis indicates the number of online reviews for NI accommodation establishments declined by one quarter during January-December 2022 compared with 2019, reflecting a downturn in international visitors on pre-COVID levels.

No. of Accommodation Reviews by Market (Jan-Dec 2022)	Change vs Jan-Dec 2019
Republic of Ireland	+16%
United Kingdom	+11%
International	-37%

Note: it is not possible to break out data specifically for NI.

Growth is evident for the number of online reviews left by ROI residents and those from other close to home markets, suggesting more overnight visitors from these areas. Although reviews from international visitors are down by over one third compared with 2019, there are signs of recovery.

### Background:

The online accommodation review data should be seen as indicative of trends rather than providing actual figures for those using NI accommodation. Factors, such as increased efforts to encourage consumers to leave online reviews, as well as methodological changes during the time periods referred to, should be taken into consideration.

### Global Review Score (GRS) (2022 vs 2019)

Accommodation	Attractions
89.3%	92.7%
no change	+0.3pps

PPS = Percentage Points

Overall, analysis of Global Review Scores suggests that NI's accommodation establishments provided a largely positive visitor experience during 2022.

Previous declines in consumers' NI accommodation experience during 2021 have shown considerable improvements, with scores during January to December 2022 returning to pre-pandemic customer experience levels.

### NI Attractions

The total number of online reviews for NI attractions fell by over half compared with January-December 2019, likely reflecting reduced levels of international visitor traffic.

Analysis indicates that NI attractions delivered an exceptionally positive visitor experience during 2022.



## Waves 10 & 11 – At a Glance



Continued high levels of ROI and domestic visitor volumes during 2022.



NI welcomed high proportions of first time ROI leisure visitors (53%) in 2022.



Visitors to NI rated their experience as positive, with the majority of consumers saying their trip matched or exceeded expectations.



Travel intentions for an NI short break were generally positive for early 2023 and the summer period. However, competition continues to intensify from abroad.

## Tourism NI Consumer Sentiment

Wave 10 of Tourism NI's consumer sentiment research was conducted in December 2022 and Wave 11 was carried out in February 2023. Both surveys collected responses from nationally representative samples in NI and ROI.

### Strong 2022 Performance

Results from Wave 10 point to continued high levels of ROI and domestic visitor volumes in 2022.

Over half of ROI visitors in 2022 were enjoying their first NI leisure trip.

### Positive Visitor Experience

For the vast majority of domestic and ROI visitors who had taken a NI trip in 2022, the experience met or exceeded expectations.

Three quarters of NI consumers and over 6 in 10 ROI consumers who recently visited NI for a short break or holiday said they would be likely to return for another NI trip in 2023.

When asked why they would return, most focused on atmosphere, food & drink, and value.

### Cost-of-living

While there is still a sense of worry about the cost-of-living crisis, 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".

### Summer 2023 Travel Intentions

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.

## Air Access into NI

2022 vs 2019



6.6m Air Passengers

-26%

### NI Airport Passengers

In 2022, there were over 6.6 million passengers flowing through NI's three main airports. This is 26% lower than the air passenger flow through NI's airports in 2019.

Airport	2022 Passengers	Change vs 2019
Belfast Int'l	4,818,214	-23%
Belfast City (George Best)	1,655,164	-33%
City of Derry	163,379	-20%

### Scheduled Air Access

Looking ahead, the **scheduled seat capacity to NI's airports in June-August 2023 is positive, sitting at 4% above 2019.**

### Scheduled Seat Capacity

(June-August 2023)

104%

of June-August 2019 seat capacity

## Sea Access into NI

2022 vs 2019



2.1m

GB Ferry Passengers

+3%



664,000

GB Car Ferry Traffic

+29%



153

Cruise Ships scheduled to dock in Belfast & Derry~Londonderry in 2022

### Ferry Data

Figures show **the number of passengers travelling on ferries to and from Northern Ireland increased by 3%** in 2022 compared to the same period in 2019.

The number of cars travelling on ferries (car ferry traffic) to and from NI experienced growth of 29% in 2022.


For comparison, the number of ferry passengers and car ferry traffic to and from the Republic of Ireland via the Central and

Southern Corridor routes\* saw decreases in 2022 vs 2019.

\*Central Corridor = Dublin and Dun Laoghaire. Southern Corridor = Rosslare.

### 2022 Cruise Schedule

**There were a record 153 cruise ships scheduled to dock in Belfast and Derry~Londonderry in 2022**, with capacity to bring over 334,000 passengers and crew to NI. These numbers look set to be exceeded in 2023.



Tourism 360° - 2022 Performance At a Glance is produced by Tourism Northern Ireland's Insights & Intelligence Service.

All information correct as of May 2023.

We welcome all feedback – [Contact us here](#).

Sign up to receive the latest news and insights from Tourism NI [here](#).

Keep up to date with Tourism NI below:

