



# TOURISM 360°

Performance Update – August 2023

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## Summary

Available data for 2023 indicate an overall positive tourism picture. Northern Ireland hotel room occupancy for January-June 2023 exceeded pre-pandemic levels, with continued strong growth evident for January-June's average daily rate and revenue per available room.

Online review data and cardholder spend data suggest the closer to home markets are continuing to perform well, particularly the Republic of Ireland, and the recovery of our international markets is ongoing. However, following a very strong 2022, coupled with the re-opening of world markets, there are indications of a slowdown in growth for the closer to home markets as anticipated.

While the air access forward picture, scheduled cruise ships and consumer demand for travel remain strong, due to the difficult economic environment and strain on consumers' wallets, there is still uncertainty around the latter months of 2023.

Northern Ireland (NI) hotel occupancy for January-June 2023 continues to exceed January-June 2019 levels, with growth driven solely by Belfast hotels. Average daily rate and revenue per available room remain significantly above pre-pandemic figures. NI room occupancy for the first half of the year increased by 4.6 percentage points compared to last year (January-June 2022).

## NI Hotel Performance January-June 2023

- STR data report NI hotel room occupancy for January-June 2023 is two percentage points above the same period in 2019.
- NI's average daily rate (ADR) and revenue per available room (RevPAR) continue to show significant growth on 2019, with increases of 39% and 44% respectively.
- Looking at individual monthly performance in June 2023 – NI room occupancy experienced a minor decline of 0.5pps compared to June 2019.

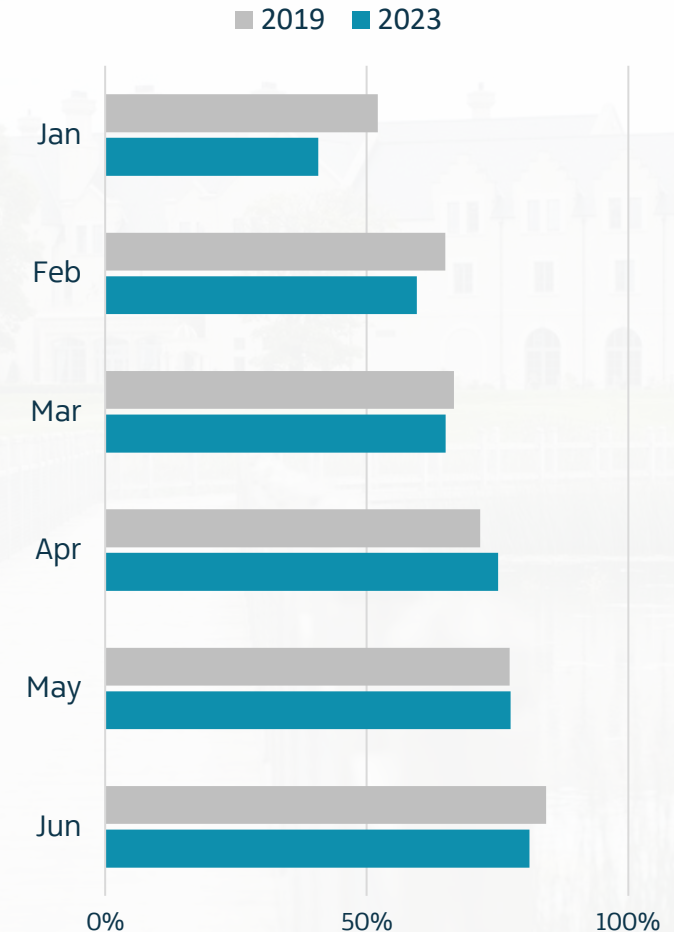
Room Occupancy	Change vs 2019
71.5%	+2 pps

*\*pps = percentage point change*

ADR	Change vs 2019
£104.49	+39%

RevPAR	Change vs 2019
£74.74	+44%

## NI Monthly Room Occupancy

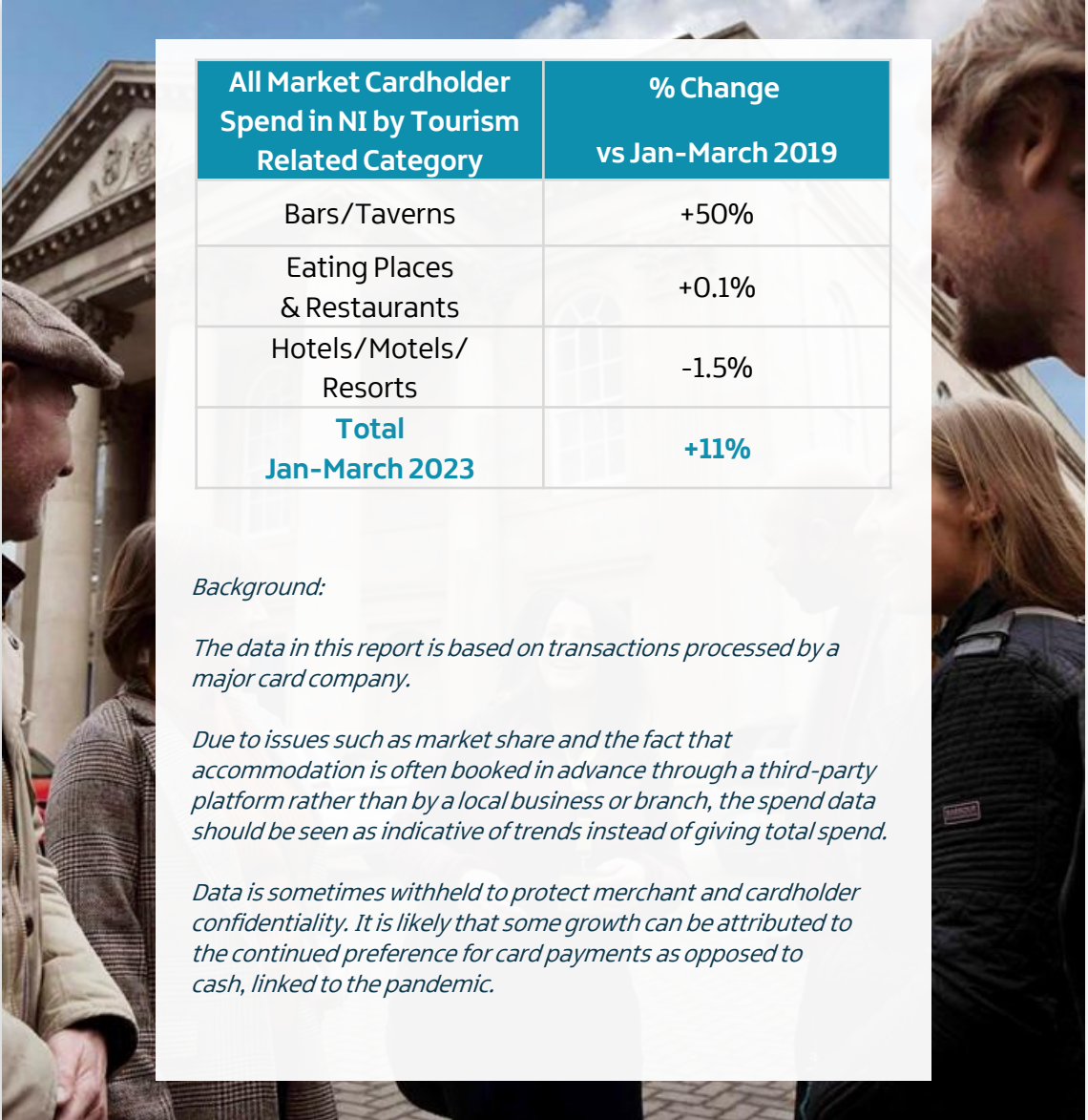


Tourism Northern Ireland's (NI) analysis of cardholder spend in NI during January–March 2023 indicates an overall positive picture, with increased tourism-related spend compared to Q1 2019. A comparison with the first quarter of 2022 suggests a slowdown in performance for the close-to-home markets but more positive spend data for the international markets. Bars & taverns had the most significant increase on spending compared to pre-pandemic levels.

## Cardholder Spend January–March 2023

- Overall, Q1 2023 domestic (NI) cardholder spend was 8% above 2019 levels. However, there was a 9% reduction in tourism-related spending from the Great Britain (GB) market compared to January–March 2019.
- Republic of Ireland (ROI) residents' cardholder spend in NI in shows significant growth on key tourism-related categories compared to the first quarter of 2019. ROI cardholder spend on accommodation experienced substantial growth on 2019 levels and spend on bars and eating places also showed significant growth.
- As international travel returns, increased spending has been identified in other overseas markets, driven primarily by longer haul markets such as North America and Australia.

Key Tourism-Related Cardholder Spend in NI by Market	
Northern Ireland	+8%
Republic of Ireland	+82%
Great Britain	-9%
<b>All Markets</b>	<b>+11%</b>



All Market Cardholder Spend in NI by Tourism Related Category	% Change vs Jan–March 2019
Bars/Taverns	+50%
Eating Places & Restaurants	+0.1%
Hotels/Motels/Resorts	-1.5%
<b>Total Jan–March 2023</b>	<b>+11%</b>

*Background:*

*The data in this report is based on transactions processed by a major card company.*

*Due to issues such as market share and the fact that accommodation is often booked in advance through a third-party platform rather than by a local business or branch, the spend data should be seen as indicative of trends instead of giving total spend.*

*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.*

Analysis of online review data for Northern Ireland (NI) accommodation suggests continued strong overnight visitor numbers from the Republic of Ireland (ROI). Reviews from visitors from the United Kingdom (UK) remain slightly above numbers in the first half of 2019, with continued signs of recovery for international markets. Attractions are recovering at a slower pace than accommodation.

## Accommodation Reviews January-June 2023

- The number of online reviews for NI accommodation establishments during Jan-June 2023 was down by 28%, reflecting the continued downturn of international visitors on pre-COVID levels.
- Although reviews from international visitors to NI remain more than one fifth below January to June 2019, there are signs of recovery.
- Following on from the increase in the number of reviews from ROI residents in 2022, the first half of 2023 indicates continued signs of growth, albeit at a marginally slower rate.
- Reviews of NI accommodation from UK residents are 2% above the same period in 2019. This is below the 11% increase recorded during January-December 2022 compared with January-December 2019.

Total Reviews	Change vs 2019
United Kingdom	+2.3%
Republic of Ireland	+12.0%
Other	-20.2%
<b>All Markets</b>	<b>-28.4%</b>

*It is not possible to break out Northern Ireland from the rest of the UK in the online review analysis. The online review data should be seen as indicative of trends rather than providing actual figures for accommodation/attractions.*

## Attraction Reviews January-June 2023

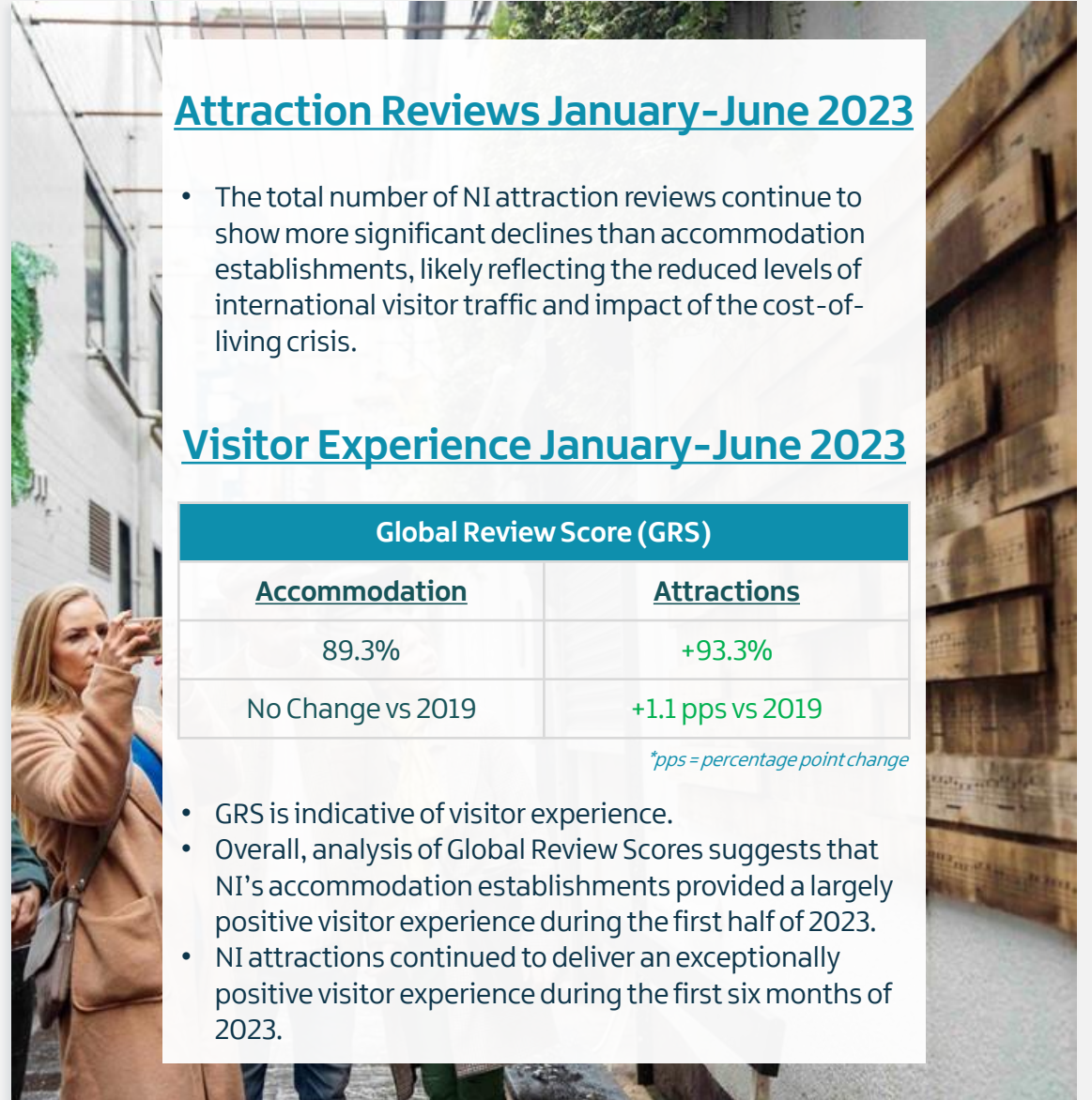
- The total number of NI attraction reviews continue to show more significant declines than accommodation establishments, likely reflecting the reduced levels of international visitor traffic and impact of the cost-of-living crisis.

## Visitor Experience January-June 2023

Global Review Score (GRS)	
Accommodation	Attractions
89.3%	+93.3%
No Change vs 2019	+1.1 pps vs 2019

*\*pps = percentage point change*

- GRS is indicative of visitor experience.
- Overall, analysis of Global Review Scores suggests that NI's accommodation establishments provided a largely positive visitor experience during the first half of 2023.
- NI attractions continued to deliver an exceptionally positive visitor experience during the first six months of 2023.



Civil Aviation Authority (CAA) airport data indicate that air passenger flow for Northern Ireland (NI) during January-May 2023 stood at 2.9m, down 16% on the same period in 2019. Conversely, January-June 2023 data for the number of passengers travelling on ferries exceeded 2019 levels. OAG flight data indicates total scheduled seats to NI Airports in the July-December 2023 will be at 110% of pre-pandemic levels seen in July-December 2019.

## Air Passenger Flow and Scheduled Seat Capacity


- CAA airport data indicate that air passenger flow for NI during January-May 2023 stood at 2.9m, down 16% on the same period in 2019. Passenger flow is improving, with increases of 16% evident compared to last year (Jan-May 2022).
- OAG flight data (as of July 2023) indicates total scheduled seats to NI Airports in July-December 2023 will be at 110% of pre-pandemic levels (July-December 2019). Total scheduled seats to NI airports in June-August 2023 is at 123% of levels seen during the same period last year.

Airport 	Jan-June 2023	Change vs 2019
Belfast Int'l	4.8m	-23%
Belfast City	1.7m	-33%
City of Derry	163k	-20%

- easyJet has put a new route on sale from Belfast International Airport to Hurgada in Egypt and TUI has announced that from May 2024 it will carry passengers direct from Belfast International Airport to Cyprus and Tunisia and in addition will double its capacity of flights to Costa Dorada and Lanzarote.

## Sea Access – Ferry Passengers

- January-June 2023 data for the number of passengers travelling on ferries to NI is at 103% of 2019 levels. Ferry passengers through the Northern Corridor (Great Britain to NI) is performing significantly better than ferry traffic through the central and southern corridors in the Republic of Ireland (ROI), where car traffic is only at 85% and 83% of 2019 levels respectively.

Corridor 	Ferry Passengers Jan-June 2023	Change vs 2019
Northern Corridor <i>(GB to NI)</i>	925,000	+3%
Central Corridor <i>(Dublin &amp; Dun Laoghaire)</i>	722,000	-15%
Southern Corridor <i>(Rosslare)</i>	200,000	-17%

There were 10.7m visits to Northern Ireland (NI) attractions in 2022. This is a significant increase on 2021 but figures have not yet recovered to 2019 levels, likely impacted by reduced international visitors as well as the cost-of-living crisis.

## 2022 Northern Ireland Visitor Attraction Survey

Top Ten Participating Visitor Attractions Visitor Numbers 2022*		
1.	Titanic Belfast	611,000
2.	Derry Walls	577,000
3.	Giant's Causeway	422,000
4.	Ulster Museum	387,000
5.	Pickie Funpark	353,000
6.	Guildhall (Derry City and Strabane District Council)	321,000
7.	W5 Science and Discovery Centre	277,000
8.	Ballyronan Marina	263,000
9.	Centre for Contemporary Art Derry~Londonderry	241,000
10.	National Trust Mount Stewart	215,000

*\*(excluding country parks/parks/forests/gardens)*

## 2022 Northern Ireland Self Catering Survey

	Annual Occupancy	Peak Occupancy
2019	34%	42%
2020	19%	23%
2021	24%	37%
2022	34%	45%

- NI's 2022 annual (January-December) and peak (April-September) unit occupancy were 34% and 45% respectively, representing a 3-percentage point increase in both compared to pre-pandemic levels in 2019.
- Average length of stay in self-catering properties increased from 3.2 days in 2019 to 3.8 days in 2022.
- The proportion of annual weeks sold to NI and Republic of Ireland residents increased between 2019 and 2022, while the proportion for overseas (inc. Great Britain) declined.

[Click here to view both reports on NISRA's website.](#)

VisitEngland's domestic sentiment tracker indicates that due to the cost-of-living crisis, the majority (66%) of UK adults are either 'cautious and being very careful' (45%) or have been 'hit hard and are cutting back' (21%). Both travel behaviour and travel intentions remain strong for overnight domestic and overnight overseas trips. Accommodation prices remain the top cost-related barrier to taking a UK domestic overnight trip.

## VisitEngland's Domestic Sentiment Tracker



- An improvement in perceptions of the cost-of-living situation is evident, with 50% of UK adults thinking 'the worst is still to come', down from three-quarters in June 2022 and 80% in September 2022.
- Despite these concerns, travel behaviour indicates high levels of domestic and overseas travel, with more than 3 in 5 (62%) having taken a UK overnight trip between July 2022 and June 2023 and 43% having taken an overseas overnight trip in that time period.
- Travel intentions also remain strong. Three quarters (75%) of UK adults are planning an overnight domestic trip in the next 12 months, compared to 72% when this research was carried out the year before (July 2022 research).
- For overnight overseas trips, intentions are on a par with 2022 at an overall level, although 2023 intentions are higher for trips planned for July and September, with almost a quarter (23%) anticipating a July-September 2023 overnight overseas trip.
- Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of accommodation remains the top cost-related barrier, followed by the cost of drinking/eating out and the cost of fuel.

## Key Findings



- Over a third (36%) of respondents indicated they are more likely to choose a UK trip than an overseas trip compared to pre-pandemic (see chart below). The top reasons for domestic preference are 'UK holidays are easier to plan' (54%) and 'UK holidays are cheaper' (54%).
- In relation to how cost-of-living increases are likely to affect domestic short breaks or holidays, 30% of UK adults say they would spend less on eating out, 28% say they would choose cheaper accommodation and 28% would look for more 'free things' to do. Almost 1 in 5 (18%) said they would take fewer UK short breaks/holidays.





**This report was produced in August 2023 by Tourism NI's Insights & Intelligence Service.**

