

NI Domestic Market - At a Glance (Jan-Dec 2019) (Source: NISRA)



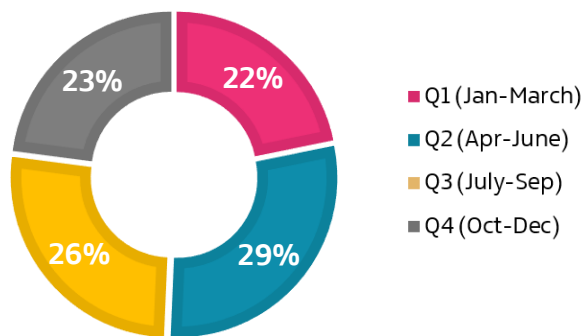
The domestic market is a critical part of Northern Ireland's (NI) tourism economy, with NI residents taking 2.3m overnight trips within NI in 2019. Visitors from outside NI - Great Britain (GB), other overseas and Republic of Ireland (ROI) - took 3.0m overnights trips in NI during the same period.

Domestic Overnight Trips Taken in NI 2015-2019						
Year	Trips (000s)	Nights (000s)	Spend (£m)	Average spend per trip	Average spend per night	Average length of stay (nights)
2015	2,230	4,791	219	£98	£46	2.1
2016	1,984	3,814	237	£120	£62	1.9
2017	2,193	5,220	270	£123	£52	2.4
2018	2,188	4,520	299	£137	£66	2.1
2019	2,332	4,768	313	£134	£66	2.0

DOMESTIC TOURISM IS IMPORTANT FOR NI AND IN 2019 ACCOUNTED FOR:

- 44% of all overnight trips taken in NI
- 29% of all nights spent in NI
- 30% of all spend in NI
- 56% of all holiday trips taken in NI

Seasonality of NI Domestic Trips (2019)



£313m spend
+5%

£858,000
spent on average each day

4.8m nights
+5%

3.1m trips
+7%

NI Domestic Market 2018/2019 % Change



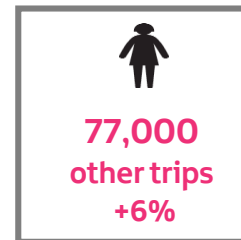
Percentage change is based on unrounded figures

NI Domestic Purpose of Visit and Length of Stay

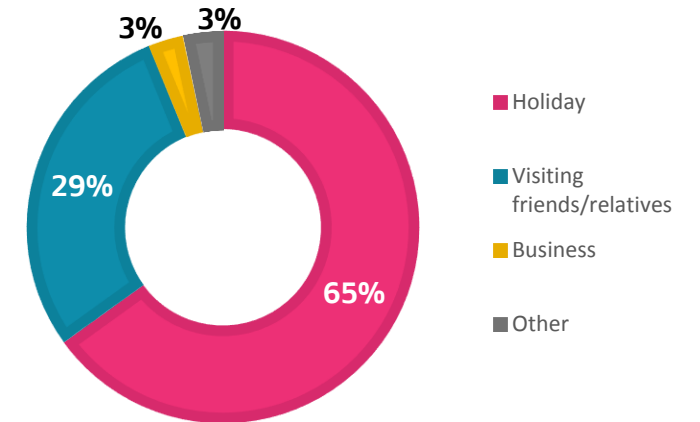
(Source: NISRA)



NI Domestic Market Trips by Purpose of Visit 2019 v 2018 % Change



NI Domestic Market Trips by Purpose of Visit (2019)



The vast majority of domestic trips and holiday trips are short breaks lasting 1-3 nights.

NI Domestic Market Total Trips & Holiday Trips by Length of Stay (2019)

All Trips	1-3 Nights	4+Nights	Total
Trips (000s)	2,081	250	2,332
Nights (000s)	3,285	1,483	4,768
Spend (£m)	£254	£60	£313
Average spend per trip	£122	£238	£134
Average spend per night	£77	£40	£66
Average length of stay (nights)	1.6	5.9	2.0

Holiday Trips	1-3 Nights	4+Nights	Total
Trips (000s)	1,328	189	1,517
Nights (000s)	2,130	1,082	3,212
Spend (£m)	£190	£44	£234
Average spend per trip	£143	£233	£154
Average spend per night	£89	£41	£73
Average length of stay (nights)	1.6	5.7	2.1

NI Domestic Holiday Market – At a Glance (Jan-Dec 2018) (Source: NISRA)



NI residents took 1.5m domestic holidays in 2019, representing over half of all holidays taken in NI

THE DOMESTIC HOLIDAY MARKET IS IMPORTANT FOR NI HOLIDAYS AND IN 2018 ACCOUNTED FOR:

- 56% of all overnight holiday trips taken in NI
- 48% of all holiday nights spent in NI
- 44% of all holiday spend in NI

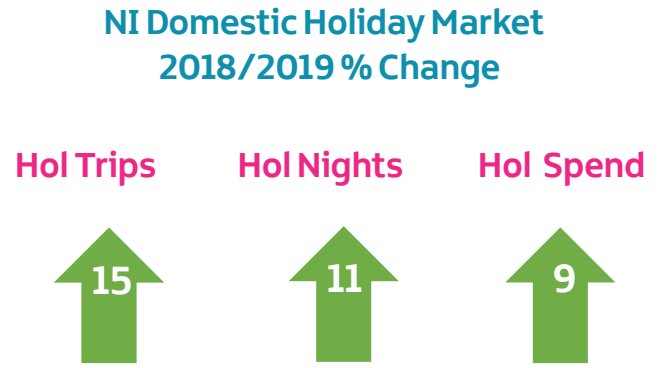
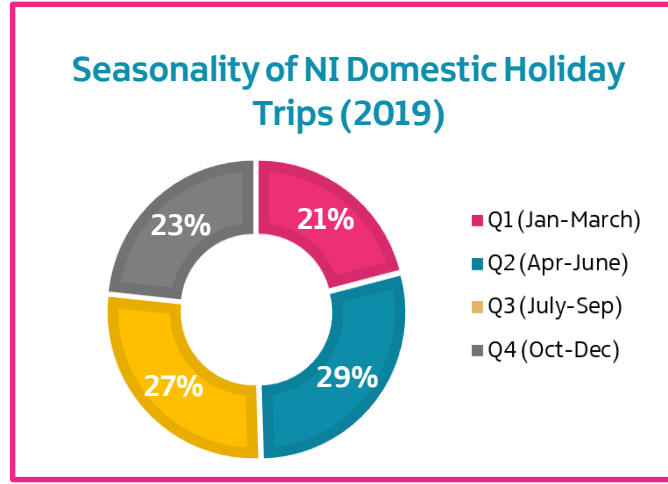
Domestic Overnight Holiday Trips Taken in NI 2014-2018						
Year	Trips (000s)	Nights (000s)	Spend (£m)	Average spend per trip	Average spend per night	Average length of stay (nights)
2015	1,209	2,802	156	£129	£56	2.3
2016	1,290	2,585	176	£137	£68	2.0
2017	1,520	3,685	221	£145	£60	2.4
2018	1,321	2,906	214	£162	£74	2.2
2019	1,517	3,212	234	£154	£73	2.1

£234m holiday spend **+9%**

£642,000 spent on average each day

3.2m holiday nights **+11%**

1.5m holiday trips **+15%**



Percentage change is based on unrounded figures

Source: NISRA

NI Domestic Market Accommodation Used (Source: NISRA)

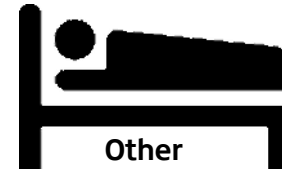


In 2019, NI tourists spent 4.8m nights on trips taken in NI. Almost one third of these nights were spent in accommodation provided free of charge by friends/relatives and one quarter were spent in hotels/motels.



Provided free of charge by friends/relatives

29%



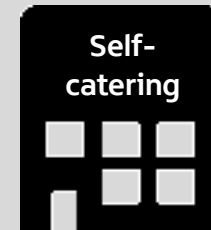
Other

11%



Hotel/motel

25%



Self-catering

10%



19%



Second home

6%

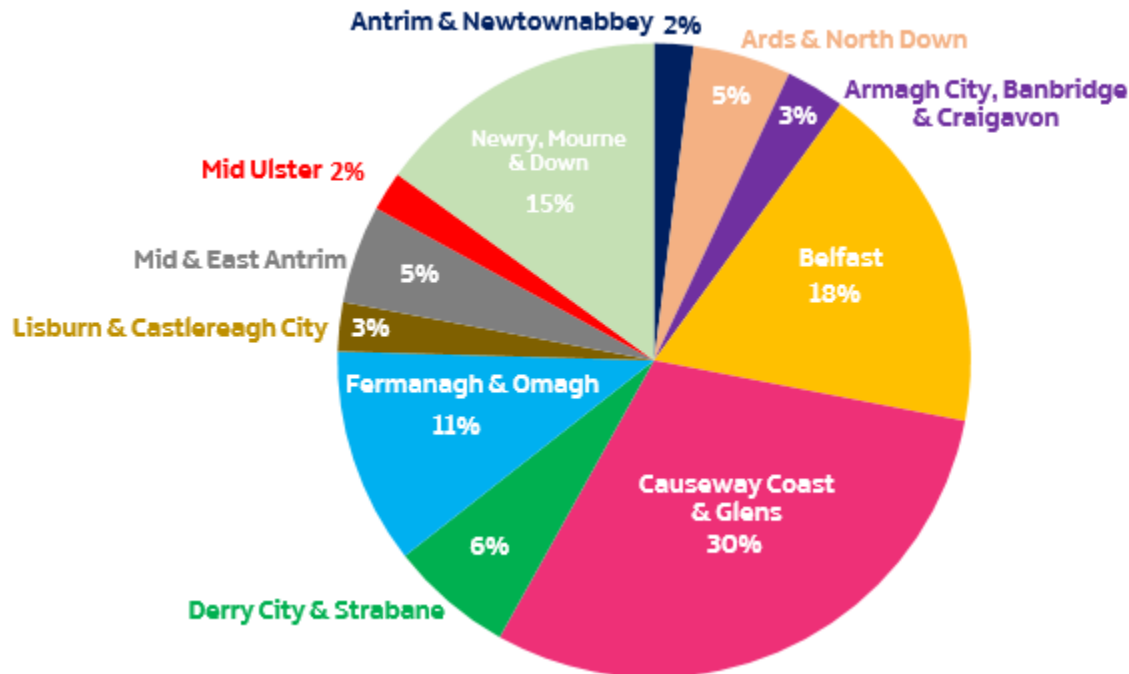
NI Domestic Market – NI Areas Visited

(Source: NISRA)



Causeway Coast & Glens was the most popular destination for NI domestic overnight trips, attracting almost one third of the domestic trips taken in NI. Belfast was the second most popular destination, followed closely Newry, Mourne & Down.

Percentage/Number of Domestic Overnight Trips Taken in each NI Council Area (3 year rolling average 2017-2019)



Council Area	No. of Trips
Antrim & Newtownabbey	49,483
Ards & North Down	101,317
Armagh City, Banbridge & Craigavon	76,919
Belfast	407,078
Causeway Coast & Glens	663,545
Derry City & Strabane	137,715
Fermanagh & Omagh	245,951
Lisburn & Castlereagh City	63,290
Mid & East Antrim	114,866
Mid Ulster	50,207
Newry, Mourne & Down	327,214

NI Domestic Market – Transport Used on Domestic Trips & Total Trips Taken by NI Residents

(Source: NISRA)



NI Domestic Market Main Transport Used (2019)

For the vast majority of NI residents (88%), car was the main form of transport used on their domestic trips



2.1m

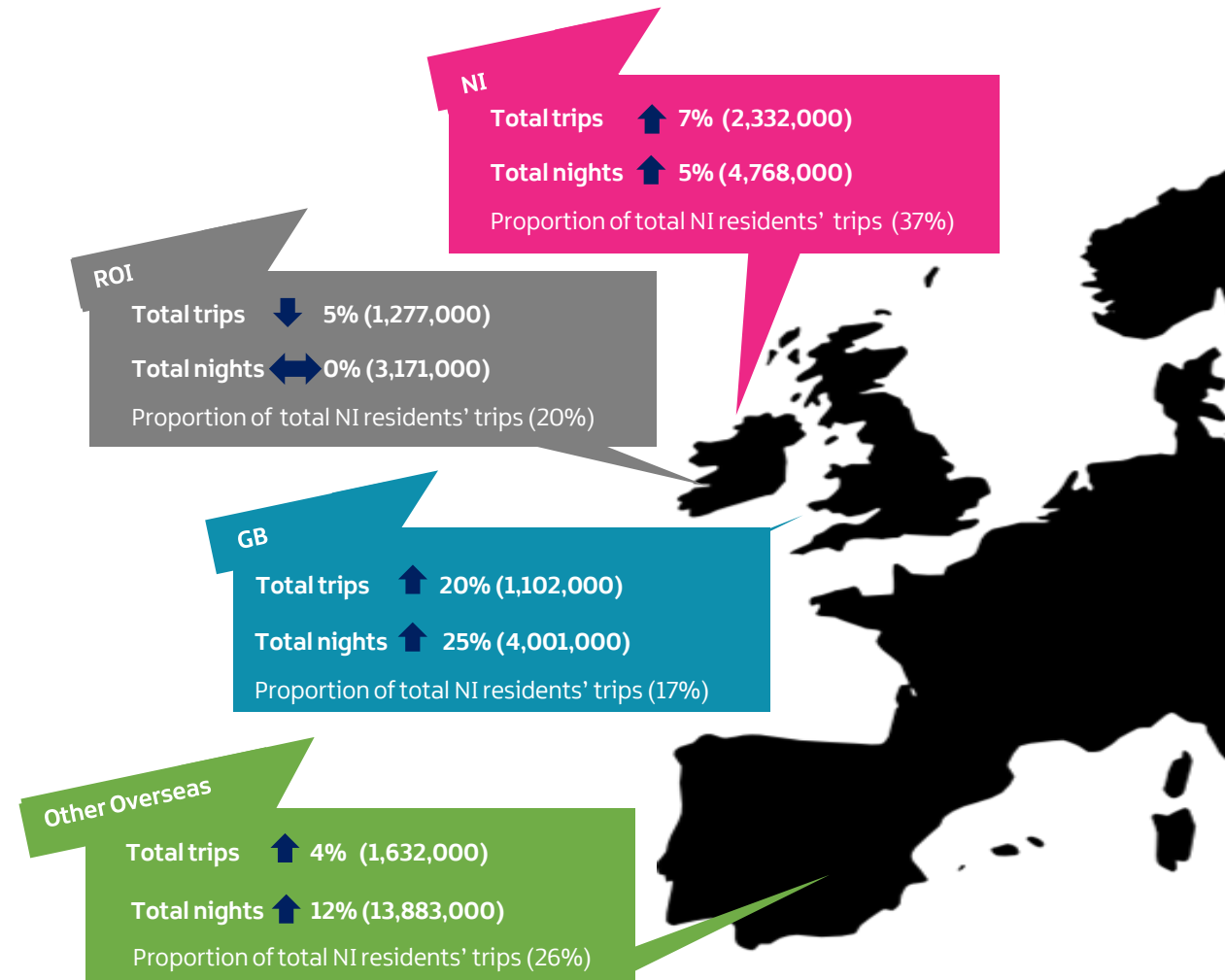


258,000



21,000

Domestic & Outbound Trips Taken by NI Residents (2019)



NI Residents took over 6m overnight trips in 2019, of which over one third were domestic trips and one fifth were taken in ROI.

NI Domestic Market Holiday Segments



6 distinct segments, 3 of which have been determined as priority segments - taking into account the potential value of each segment and the feasibility/likelihood of the NI market being able to attract each of these segments.

Priority Segments

1. Aspiring Families
2. Natural Quality Seekers
3. Social Instagrammers



30%
of NI
holidaymakers
are 'Aspiring
Families'

Other Segments

4. Comfort Seekers
5. Pragmatists
6. Short Break Enthusiasts

See overleaf for the size and descriptions of the NI holidaymaker segments



While demographics have been included in the following summaries, the segmentation strategy was developed with a focus on key needs, motivations and behaviours of consumers within the domestic market.

By looking at the market through this lens it is possible to target priority segments in the most compelling manner, tapping into their key motivations, meeting their most important needs and acting on their most likely behaviours.

NI Domestic Market Holiday Segments



Aspiring Families (30%)

- Strong family focus
- Activities very important
- (all types, variety of interests)
- Need activities to suit children as well as the whole family
- Planners – do a lot of research
- Pay attention to price, seeking value
- Consider themselves bargain hunters but not afraid to pay for quality (if worth it)

Demographics:

Most likely 35-44, even social class split, have younger children (under 16)

Estimated spend: £1,360

Pragmatists (13%)

- Inclined to be seeking value (price focused) but also want quality (balanced decision makers)
- Like to relax and need to feel welcome
- Have a focus on enjoying good food
- Active researchers – gather information from a variety of sources
- Active on social media

Demographics:

Female bias, older (av. age 45), older children, even social class split

Estimated spend: £964

Comfort Seekers (13%)

- Seeking safe, secure, easy to get to and easy to organize short breaks
- Need to feel welcome
- Love familiar places where they can relax
- Love nature, culture and enjoy engaging locals
- Care for the environment and are interested in sustainability
- Active online but limited/little use of social media

Demographics:

Older, more female, C2DEF socio economic groups, older kids 16+

Estimated spend*: £822

Source: NI Domestic Market Review

*Estimated spend was determined by each segment's estimated expenditure on short breaks within NI, Republic of Ireland or Great Britain in a calendar year

NI Domestic Market Holiday Segments



Short Break Enthusiasts (14%)

- Love short breaks – important part of their lives
- Active planners – research in detail
- Actively write reviews online
- Seeking to engage with people and culture
- Will indulge themselves
- Big food emphasis
- Quality and location key

Demographics:

Even gender split, older (av. Age 54), even social class split

Estimated spend*: £822

Naturally Quality Seekers (15%)

- Quality of accommodation important
- Nature lovers, enjoy the outdoors
- Preference for gentle activities
- Sustainability important
- Enjoy planning and like to have clear itineraries
- Short breaks important part of their lives

Demographics:

Older (av. Age 55) more likely to be male, ABC1, older kids

Estimated spend: £1,238

Social Instragrammers (15%)

- Buzz and atmosphere seekers
- Seeking nightlife, great pubs etc.
- More likely to use AirBnB
- Short breaks important part of life
- Want to broaden the mind
- Connectivity very important (Wifi, 4G)
- Getting a good deal and engaging in activities deemed more important than finding great accommodation

Demographics:

Youngest segment with 29% aged 18-24 years and 26% aged 25-34 years. Least likely to have children. More likely to be female, slight C2DE bias

Estimated spend: £1,006

Source: NI Domestic Market Review

*Estimated spend was determined by each segment's estimated expenditure on short breaks within NI, Republic of Ireland or Great Britain in a calendar year