July 2022

TOURISM 360°

Latest Performance – At a Glance

tourism northernireland

This Issue

At a Glance...

Year to date performance for 2022 is mixed, with some key indicators not achieving 2019 levels whereas hotel rates, for example, continue to exceed 2019. **As each month passes, the difference with pre-pandemic performance is generally narrowing**, and hotels and tour operators report strong forward bookings. Data continue to indicate that the closer to home markets, particularly Republic of Ireland (ROI) , have been buoying performance.

Research indicates continued strong demand for a Northern Ireland (NI) trip from our close to home markets for summer 2022, however global reopening brings greater competition. The air access forward picture for July-September 2022 is positive, with data from OAG showing air seat capacity to Northern Ireland is expected to be at 89% of the level seen in the same period in 2019.

The trend towards last-minute booking makes it more difficult to predict performance, however industry feedback suggests a strong summer but a more uncertain autumn. **While the overall outlook for 2022 remains positive, with consumers exhibiting pent up demand and greater confidence in travel, bumps are still anticipated in the road ahead. Key challenges remain related to the recent increase in COVID-19 cases, staffing issues and the rising cost of living, particularly energy costs.** We have already seen some erosion of NI's value for money rating in recent months.

Staffing issues in airports are causing extensive travel delays and could negatively impact on consumer travel confidence as the sector rebounds. **While ongoing flight cancellations and travel disruption could negatively impact on overseas visitor numbers, they could also result in an increase in staycations over the coming months**.

At a Glance – Jan-May 2022 vs 2019

64% Room Occupancy
-3 percentage points

956,000 Rooms Sold
-11%

ADR = £95.74
+32%

RevPAR = £60.78
+26%

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 Room Occupancy

NI hotels have experienced a mixed start to 2022. Year-to-date hotel room occupancy was 3 percentage points lower than January-May 2019. Overall, we are getting closer to pre-pandemic performance as the year progresses. Encouragingly, room occupancy in April exceeded 2019 levels (likely helped by a strong Easter performance) while May matched 2019 occupancy levels. Forward booking data suggests that Belfast hotels are exceeding 2021 occupancy levels over the summer period.

Month (2022)	Room Occupancy	Change vs 2019
January	41%	-11pps
February	60%	-5pps
March	65%	-2pps
April	75%	+3pps
May	78%	No change
Jan-May 2022	**64%**	**-3pps**

NI Hotel Room Sales

NI year-to-date hotel room sales have declined by 11% compared to January-May 2019. Room sales followed a similar trend to occupancy, where performance largely improved with each passing month. However, no individual monthly room sales have yet exceeded 2019 levels.

Month (2022)	Room Sales	Change vs 2019
January	127,000	-26%
February	166,000	-15%
March	200,000	-9%
April	225,000	-2%
May	238,000	-7%
Jan-May 2022	**956,000**	**-11%**

Source: STR

At a Glance – Jan-April 2022 vs 2019

26% Room occupancy
+2 percentage points

17% Bed occupancy
-1 percentage point

128,000 Room sales
+18%

113,000 Bed sales
+4%

NI GH/GA/BB Performance

GH/GA/BB Occupancy

NI guesthouses, guest accommodation and B&Bs (GH/GA/BB) have had a relatively positive year-to-date in 2022, with performance suggesting this sector is progressing slightly better in its recovery than hotels.

January-April 2022 room occupancy is 2 percentage points above levels seen during the same period in 2019, while bed occupancy remains 1 percentage point below 2019.

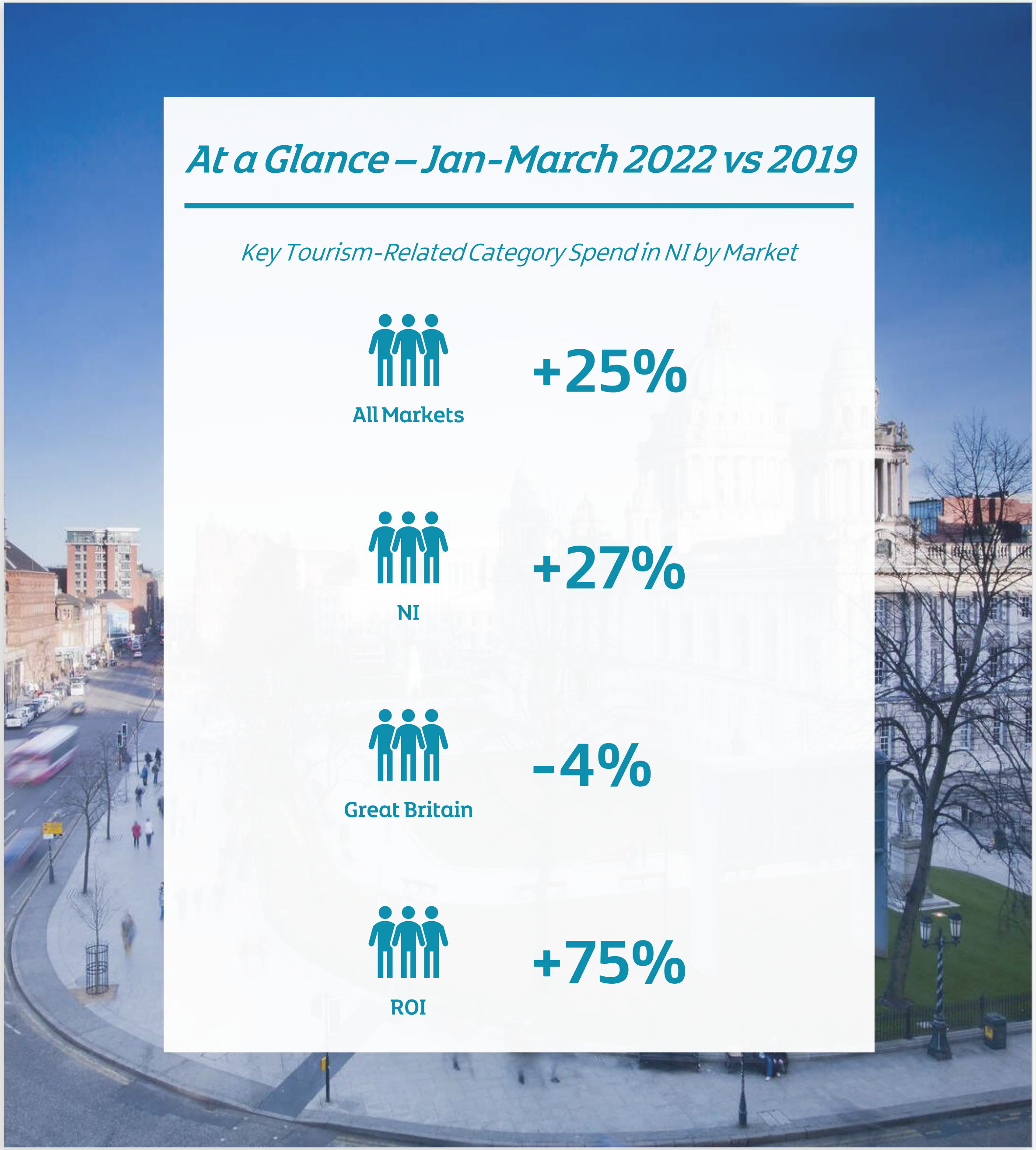
Month (2022)	Room Occupancy	Change vs 2019
January	12%	-5pps
February	23%	-1pps
March	32%	+6pps
April	39%	+5pps
Jan-April 2022	**26%**	**+2pps**

GH/GA/BB Room & Bed Sales

NI guesthouse, guest accommodation and B&B room sales have increased by almost one fifth (18%) compared to January-April 2019, primarily as a result of strong performance in March and April 2022. January-April 2022 bed sales have also exceeded 2019 levels by 4%.

Month (2022)	Room Sales	Change vs 2019
January	14,000	-24%
February	24,000	+1%
March	40,000	+40%
April	50,000	+35%
Jan-April 2022	**128,000**	**+18%**

Source: Northern Ireland Statistics & Research Agency (NISRA)



At a Glance – Jan-March 2022 vs 2019

Key Tourism-Related Category Spend in NI by Market

+25% All Markets

+27% NI

-4% Great Britain

+75% ROI

Cardholder Spend in NI

Key Tourism-Related Spend

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

All Market Spend in NI by Tourism Related Category	% Change vs 2019
Bars/Taverns	+70%
Eating Places & Restaurants	+11%
Hotels/Motels/Resorts	+14%
Total Jan-March 2022	**+25%**

Analysis of available cardholder spend indicates that there was a 25% increase in key tourism-related spend during the first quarter of the year compared to Jan-March 2019. Spend on hotels/motels/resorts increased by 14% during the same time period.

NI domestic cardholder spend on the key tourism-related categories outlined above rose by 27% in January-March 2022 vs 2019, while Great Britain (GB) spend saw a minor decline of 4%, and ROI experienced the biggest increase on pre-pandemic levels, (+75%).

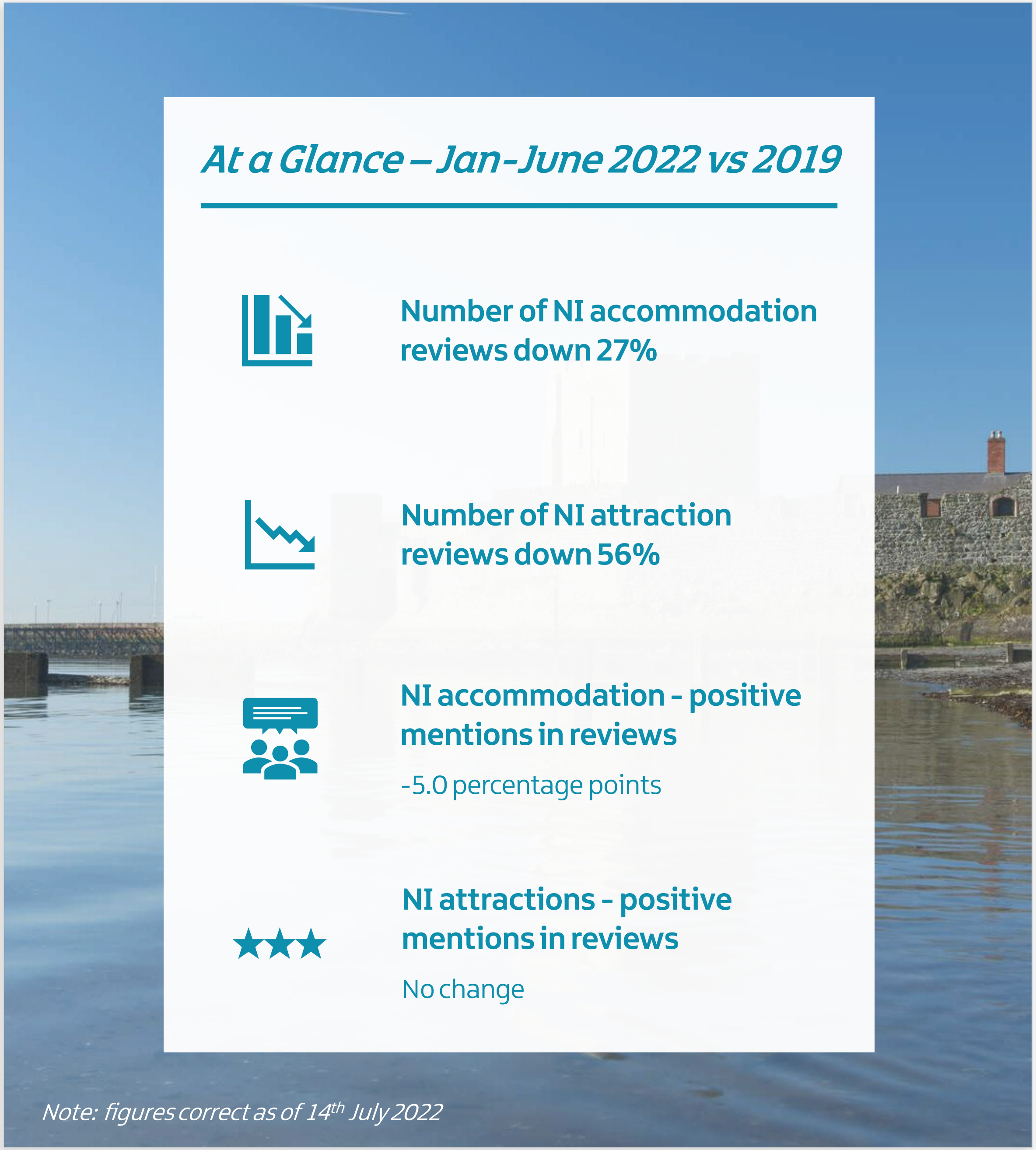
Predictably, as international travel is showing slower recovery than closer to home markets, cardholder spend in NI from other markets (countries outside of ROI, NI and GB) experienced a decline of 35%.

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.

Source: Tourism Northern Ireland analysis of cardholder spend



At a Glance – Jan-June 2022 vs 2019

Number of NI accommodation reviews down 27%

Number of NI attraction reviews down 56%

NI accommodation - positive mentions in reviews

-5.0 percentage points

NI attractions - positive mentions in reviews

No change

Note: figures correct as of 14th July 2022

Online Review Analysis

NI Accommodation

Overall, the number of online reviews for NI accommodation establishments declined by 27% during January-June 2022, reflecting a downturn in overseas visitors on pre-COVID levels.

The number of NI accommodation reviews from ROI residents was substantially higher than the same period in 2019, suggesting increased levels of overnight ROI visitors to NI. Reviews from United Kingdom (UK) residents were around 12% higher compared with January-June 2019.

No. of Accommodation Reviews by Market (Jan-June 2022)	Change vs Jan-June 2019
Republic of Ireland	+24%
United Kingdom	+12%
Other Overseas	-44%

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

Review analysis suggests that NI's accommodation establishments provided a largely positive visitor experience for the first half of 2022, despite the difficult operating circumstances, although scores remain lower than pre-pandemic customer experience levels. For some, the visitor experience has been negatively impacted by staff related issues.

NI Attractions

The total number of online reviews for NI attractions fell by 56% compared with January-June 2019, while ROI and Scottish reviews declined by 59% and 63% respectively, likely reflecting reduced levels of international visitor traffic and continued nervousness around indoor activities.

Analysis indicates that NI attractions continued to deliver an exceptionally positive visitor experience over the first half of 2022.

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.

Source: Tourism Northern Ireland analysis of online reviews

Wave 8 – At a Glance

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

NI again welcomed high proportions of first time ROI visitors (50%) in Q1 2022.

Travel intentions for an NI short break were generally positive for the summer period.

Competition continues to intensify, with intentions to travel abroad growing in NI & ROI.

Tourism NI Consumer Sentiment

Fieldwork for Wave 8 of Tourism NI's consumer sentiment was conducted at the end of March and start of April 2022 with nationally representative samples in NI and ROI.

2022 Travel to Date

Results from Wave 8 point to continued high levels of ROI and domestic visitor volumes during 2022.

For the vast majority of domestic and ROI visitors who had taken an NI trip in 2022, it met or exceeded expectations, and half of ROI visitors in 2022 were enjoying their first NI holiday/short break.

While ROI and NI consumers rate NI as better value for money than GB or ROI, but behind Spain, some erosion in NI's perceived value for money is evident in recent waves.

Safety/Comfort Levels

Most consumers in both markets now feel comfortable engaging in indoor and outdoor activities.

Summer Travel Intentions

Positive indications are evident for domestic and ROI visitor volumes over the summer months.

Key motivations for taking a break in NI continue to centre around relaxation, having fun and the opportunity to escape and get away from it all.

Sun holidays were the most popular type of trip abroad being considered by both NI and ROI consumers.

Notably, the vast majority of consumers in both markets expect to be negatively affected by cost of living increases.

Source: Tourism Northern Ireland's Consumer Sentiment Research

Air Access into NI

January-May 2022 vs 2019

10,000 flights
-37%

2.2m Air Passengers
-36%

70 Routes
-17 routes

NI Airport Passengers

Between January-May 2022, there were over 2.2 million passengers flowing through NI's three main airports. This is 36% lower than the number of air passengers between January-May 2019.

Airport	2022 Passengers	Change vs 2019
Belfast Int'l	1,794,715	-28%
Belfast City (George Best)	409,851	-57%
City of Derry	55,243	-28%

Scheduled Air Access

The air access forward picture for July-September 2022 is positive, with data from OAG showing air seat capacity to Northern Ireland is expected to be at 89% of the level seen in the same period in 2019.

Scheduled Seat Capacity
(July-September 2022)

is at 89%
of July-September 2019 seat capacity

Sea Access into NI

January-May 2022 vs 2019

222,000
Car Ferry Traffic
+30%

151
Cruise Ships scheduled to dock in NI in 2022

325,500
2022 NI cruise ship capacity

Car Ferry Traffic

Latest figures show the number of cars travelling on ferries (car ferry traffic) to Northern Ireland from Great Britain increased by 30% in January-May 2022 compared to the same period in 2019.

For comparison, car ferry traffic to the Republic of Ireland via the Central and Southern Corridor routes saw decreases in the number of cars travelling on ferries of 17% and 11% respectively in January-May 2022 vs 2019.

2022 Cruise Schedule Outlook

The first cruise ship of the 2022 season docked in Belfast harbour on 1st April, signalling the beginning of a busy 2022 schedule. Cruise Belfast reports that there are 144 cruise ships scheduled to dock in Belfast between April-November 2022, with capacity to bring over 320,000 visitors to Northern Ireland.

There are a further 7 cruise ships scheduled to dock in Foyle Port between May and September 2022, with capacity to bring more than 5,500 visitors to NI.

Source: Civil Aviation Authority, OAG , Cruise Belfast, FerryStat & VisitDerry

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

All information correct as of July 2022.

We welcome all feedback – Contact us here.

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