

Tourism NI Performance Report 2022/23





Performance Report 2022/2023

Northern Ireland's tourism industry ended the 2022/2023 financial year on a positive note with industry performance indicators suggesting that recovery was well underway with some sectors of the industry performing exceptionally well. Tourism NI is pleased to have played an integral role in the industry's recovery through its marketing and promotional campaigns, B2B support to local experience and accommodation providers and its financial and advisory support to a wide range of local tourism businesses.

We have used our multi-award-winning 'Embrace a Giant Spirit' brand to both promote Northern Ireland's breathtaking landscape, heritage and culture whilst simultaneously supporting tourism providers to develop authentic experiences which meet the needs of customers and attracts visitors from both local and overseas markets.

In August 2022 the Department for the Economy and Tourism NI announced an £11.5m funding package to support the ongoing recovery of the tourism sector and tackle the new challenges created by the increasing cost of doing business.

The funding was focused on supporting the development of new visitor experiences, enhancing the resilience of tourism businesses, and securing additional revenue from both the domestic and Republic of Ireland markets.

Marketing

During the course of the year Tourism NI ran three marketing campaigns in both Northern Ireland and the Republic of Ireland generating an impressive £189.5 million in directly attributable revenue. The wider impact of this marketing activity became apparent with the release of tourism statistics by the Central Statistics Office in Dublin in Spring 2023 which revealed that overnight trips from the Republic to Northern Ireland had topped one million for the first time.



3 campaigns ran in NI & ROI.

They generated **£189.5 million in directly attributable revenue** and an average return on investment of £97.70: £1 in NI and £110.82: £1 in ROI

There were more than 1.1m overnight trips by visitors from the Republic to Northern Ireland in 2022, compared to 756,000 in 2019, a 51% rise.

Those visitors spent a total of 2.6m nights in Northern Ireland representing a 42% increase on the 1.9m nights in 2019.



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.

The figures further revealed that the amount of money spent by visitors from the Republic to Northern Ireland had increased by 64% to £233 million in 2022 when compared with the previous record spend in 2019.



We had **413 applications** for the cooperative marketing fund.



We generated **£8.9 million PR value** with an impact score of **84**.



We attracted **6.7 million digital engagements**.



We delivered **424 international media visits**.



512

international operators took part in familiarisation visits to Northern Ireland.

These figures point to the success of Tourism NI's marketing efforts and a significant increase in Northern Ireland's share of the all-island staycation market.

Tourism NI and our Embrace a Giant Spirit brand received no fewer than fifteen marketing awards in 2022 demonstrating the commitment of its senior management team, staff, and board to work in collaboration with other stakeholders to champion Northern Ireland as an attractive destination across all our core markets.

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Our co-operative marketing fund attracted 413 applications, and we provided £793,545 of funding to support our industry's marketing activity in the Northern Ireland and Republic of Ireland markets.

Working in partnership with our colleagues in Tourism Ireland, Tourism NI delivered 424 international media visits, generating €51 million positive publicity for Northern Ireland in overseas markets.

Business Solutions

Throughout the year our Business Solutions team worked with Tourism Ireland and other strategic partners to deliver a range of platforms and engagement opportunities for Northern Ireland industry to meet and do business with International Travel Trade and MICE (Meeting, Incentive, Conference, Events) operators and buyers. Recruitment took place for 69 Overseas platforms offering 329 engagement opportunities. 512 international operators took part in familiarisation visits to Northern Ireland. Tourism NI also delivered a programme of B2B workshops during the year including the ITOA (Incoming Tour Operators Association) Workshop and Meet the Buyer.

ITOA are the main membership body for major tour operators in ROI. In 2022, ITOA members delivered 537,000 overseas holiday and business tourism visitors to the island of Ireland, the value of which was €483 Million to the economy. Approx 10% of this distribution is to NI.



ITOA members:
537,000 visitors
€483m revenue
10% to NI



The 2022 workshop welcomed 50 ITOA operators to host meetings with NI Industry. Post event 100% of these operators confirmed that they delivered new business and programmes

to Northern Ireland and 50% confirmed they delivered new business to the Fermanagh Region where the event was hosted.

Tourism NI's flagship Meet the Buyer Workshop was delivered in partnership Tourism Ireland. Over 150 international operators from 17 international markets met with NI Industry for 1-1 meetings. Over 70 operators took part in familiarisation trips across Northern Ireland. Post event, 61% of operators confirmed they will definitely do business in Northern Ireland and 56% have already contracted or agreed business coming out of Meet the Buyer.



Meet the Buyer

150 + international operators
from **17** international markets

The team also partnered with Tourism Ireland to welcome top US Tour Operator 'Collette Vacations' to Northern Ireland. Collette brought 200 of their top agents to NI as part of an incentive. Tourism Northern Ireland worked closely with them to showcase Northern Ireland with 23 familiarisation trips taking place across the region. Collette are currently adding to their existing programmes and creating new programmes because of the partnership.



Conference Support Fund
supporting **Visit Belfast** to deliver
99 events with an economic
impact of **£39 million**

In Business Tourism through its Conference Support Fund, Tourism Northern Ireland helped Visit Belfast to deliver 99 events during 22/23 with an economic impact of £39,018,484 and further conferences with an expected economic impact of £31.2 million were confirmed for future years.

Enterprise Development

Over the course of the year Tourism NI delivered an extensive hybrid Tourism Enterprise Development Programme. Over 600 businesses participated in the programme with 94% of attendees taking positive action within their business as a result of their participation.

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94% of the 600 businesses on Tourism NI's hybrid Tourism Enterprise Development Programme took positive action as a result of their participation.

The 'Leaner and Greener' series of masterclasses also equipped the industry to become more sustainable and to save money. Furthermore, 45 businesses received bespoke advisory support through the Kickstart programme to accelerate their recovery and growth.

Tourism NI's 'Make It Here' careers campaign, which aims to encourage more people to consider a career in the tourism and hospitality industry, also saw significant results. Phase One of the 'Make It Here' multimedia programme, was launched in a bid to build on ongoing initiatives by industry bodies to change perceptions of careers in the industry.

By the end of March 2023, nearly 30,000 visits had been made to the site with 38% (over 11,000 people) proceeding to the linked recruitment sites in search of jobs in the tourism and hospitality industry.



32 events supported, attracting over 1.4m visitors generating an economic impact of £44.5m

Events

Tourism NI also provided financial support of over £932k to 32 events under two schemes: the International Tourism Events Fund, and the National Tourism Events Sponsorship Scheme. The events supported attracted more than 1.4 million visitors, generating almost 200k bednights, and an economic impact of £44.5 million.

In August 2022 Tourism NI worked closely with the organisers to host the ISPS Handa World Invitational golf tournament, which generated in excess of £10m combined economic and media benefit and provided Northern Ireland with an opportunity to demonstrate to a global audience its appeal as a world class golf destination.

Preparations are also underway for the 153rd Open

Championship which will return to Northern in 2025 after the success of the 2019 event.

Tourism NI also supported preparations for the One Young World Summit due to be hosted in Belfast in October 2023, attracting over 2,000 delegates.

Quality and Standards

The team carried out 1727 inspections over the year, 730 of which were newly certified properties. 378 quality grading assessments were carried out across NI accommodation and experience providers.



Experience Development

The Tourism NI Regions Team is supporting the 11 Councils across Northern Ireland in the delivery of the Tourism Led Regeneration Projects within the various City & Growth Deal programmes.

Progress has been made in the development in a number of these projects including The Royal Hillsborough Regeneration Project, Belfast Stories, the Derry North Atlantic Museum, the extension to the Gobbins, and the Mourne Gateway Project, all of which will be welcome additions to Northern Ireland's portfolio of tourist attractions.

Tourism NI supported the development of 18 new and enhanced visitor facilities through the Experience Development Programme. These projects included investment in the Walled City Brewery, Montalto Estate and Gardens, Alive Adventures, Saint Patrick Centre, Crumlin Road Gaol, Glenshane Country Farm and Exploris Aquarium.

Accommodation providers also availed of a Web Development Programme with 17 businesses enhancing their digital presence.

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The Market Led Product Development Programme supported innovative activity in partnership with all councils in Northern Ireland, enhancing and developing experiences such as the Derry Girls Experience.



11 councils supported on the **Market Led Product Development Programme**
17 businesses assisted on the **Website Development Programme**
18 capital projects supported on the **Experience Development Programme**

Looking ahead there are considerable tourism opportunities on the horizon for Northern Ireland and, despite current budgetary challenges, the organisation and its staff are committed to building on the progress that has been made in the last 12 months through a return to sustainable and lasting growth.

Insights & Intelligence

The Insights and Intelligence Service is responsible for delivering a robust evidence base for TNI, industry and stakeholders to help inform policy and strategy development and operational decisions.

This year, the team's primary research consisted of four waves of consumer sentiment research in NI and the ROI, one NI industry barometer, one ROI 'Deep Dive' surveying ROI residents who had visited NI for a short or long break in the last 3 years, and three marketing campaign evaluation surveys in NI and ROI. The team also facilitated 34 bespoke in-house surveys including the Tourism NI People Survey and a range of post-event/post-fam feedback surveys.

There were three Tourism 360 publications published this year and in total, Tourism 360 publications were downloaded 413 times between 1st April 2022 - 31st March 2023. Monthly accommodation performance reports were also published on tourismni.com.

22

FOI responses

Departmental &
Official responses

259

Business Planning & Improvement

The Business Planning & Improvement Unit, which is responsible for co-ordinating key corporate information on behalf of Tourism NI, answered 22 Freedom of Information queries and provided 259 departmental and official responses.



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© Tourism Northern Ireland
Telephone: +44 (0) 28 9023 1221
Fax: +44 (0) 28 9024 0960

Linum Chambers, Bedford Street,
Belfast, BT2 7ES.
Email: info@tourismni.com