



Tourism Ireland

Marketing Plans

2023

NORTHERN IRELAND: STRATEGIC OPPORTUNITIES FOR GROWTH

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INTRODUCTION

- A lookback
- Current outlook
- Strategic opportunities
- Questions



NORTHERN IRELAND'S TOURISM SUCCESS 2002 - 2019

£7.2bn

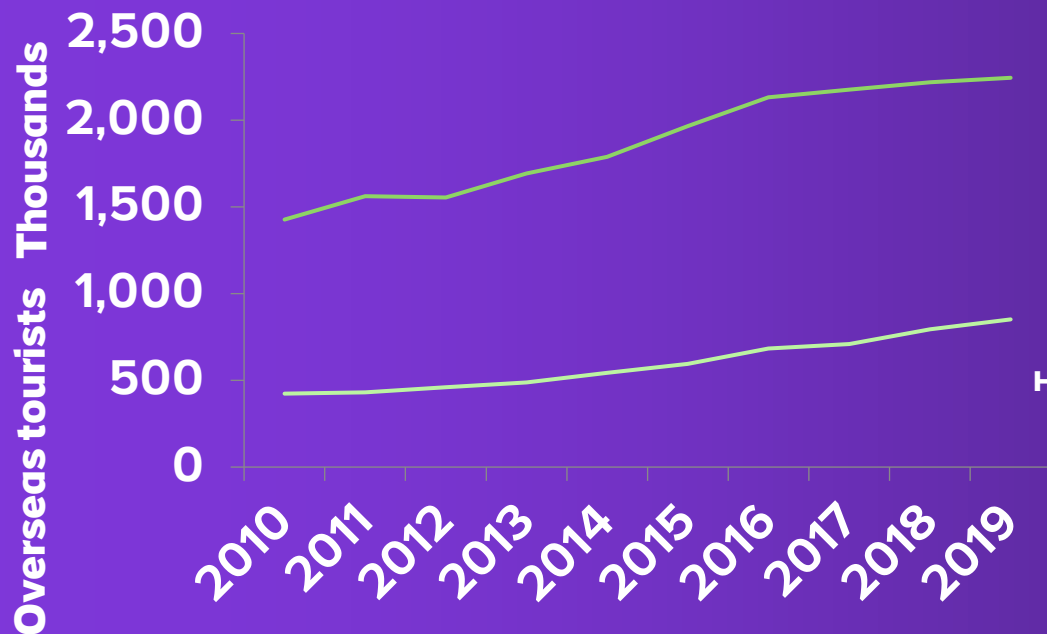
Revenue

32m

Overseas tourists

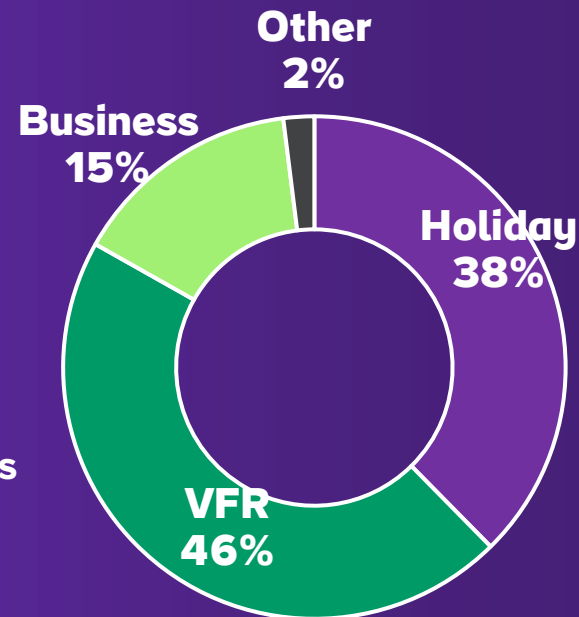


HOLIDAYMAKERS TO NORTHERN IRELAND HAVE DOUBLED SINCE 2010



2.2M
TOURISTS
+57%
SINCE
2010

852k
HOLIDAYMAKERS
+101%
SINCE
2010



OVERSEAS TOURISTS

2019 Northern Ireland results

% change 2019 vs.
2018



2.2M
Tourists



£589M
Spend



10M
Nights



852K
Holidaymakers



£217M
Holiday Spend

+1.2%

+5.1%

-3.1%

+7.3%

+14.7%

TOURISTS

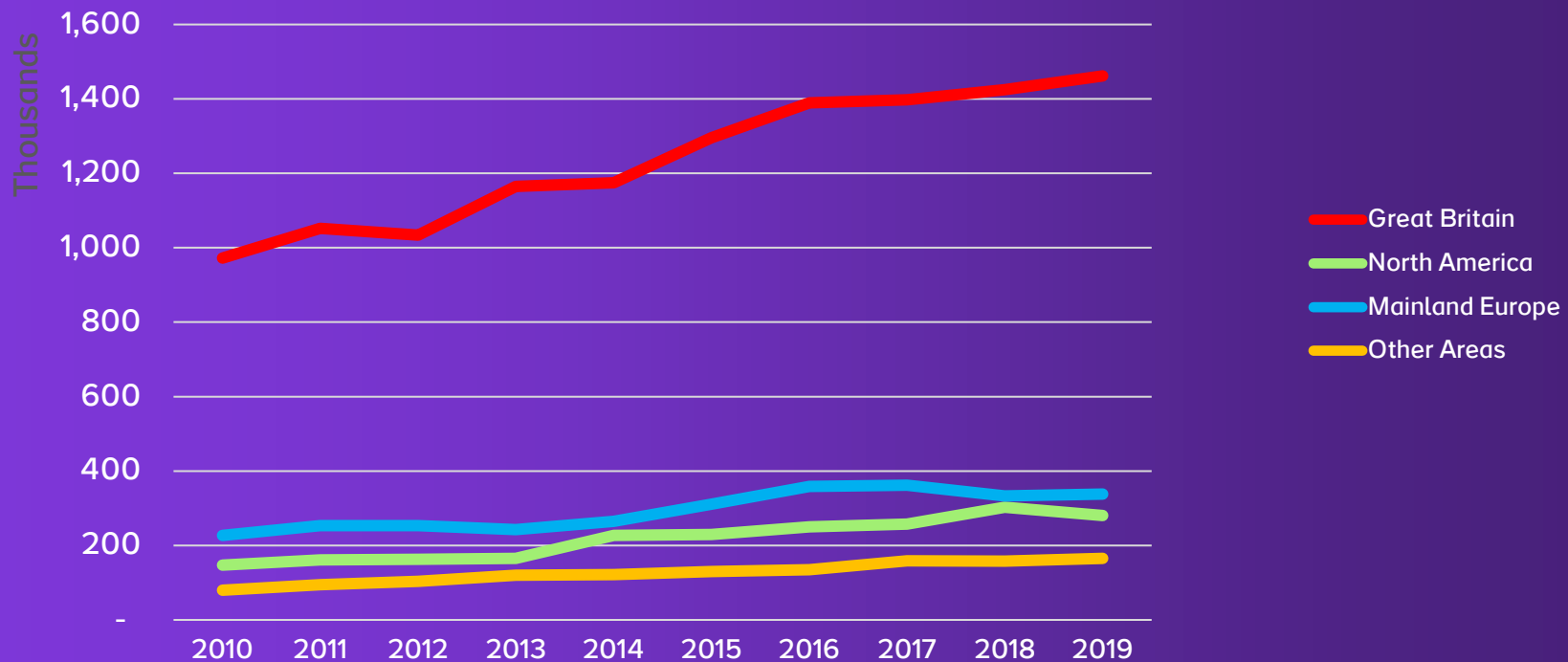
SPEND

NIGHTS

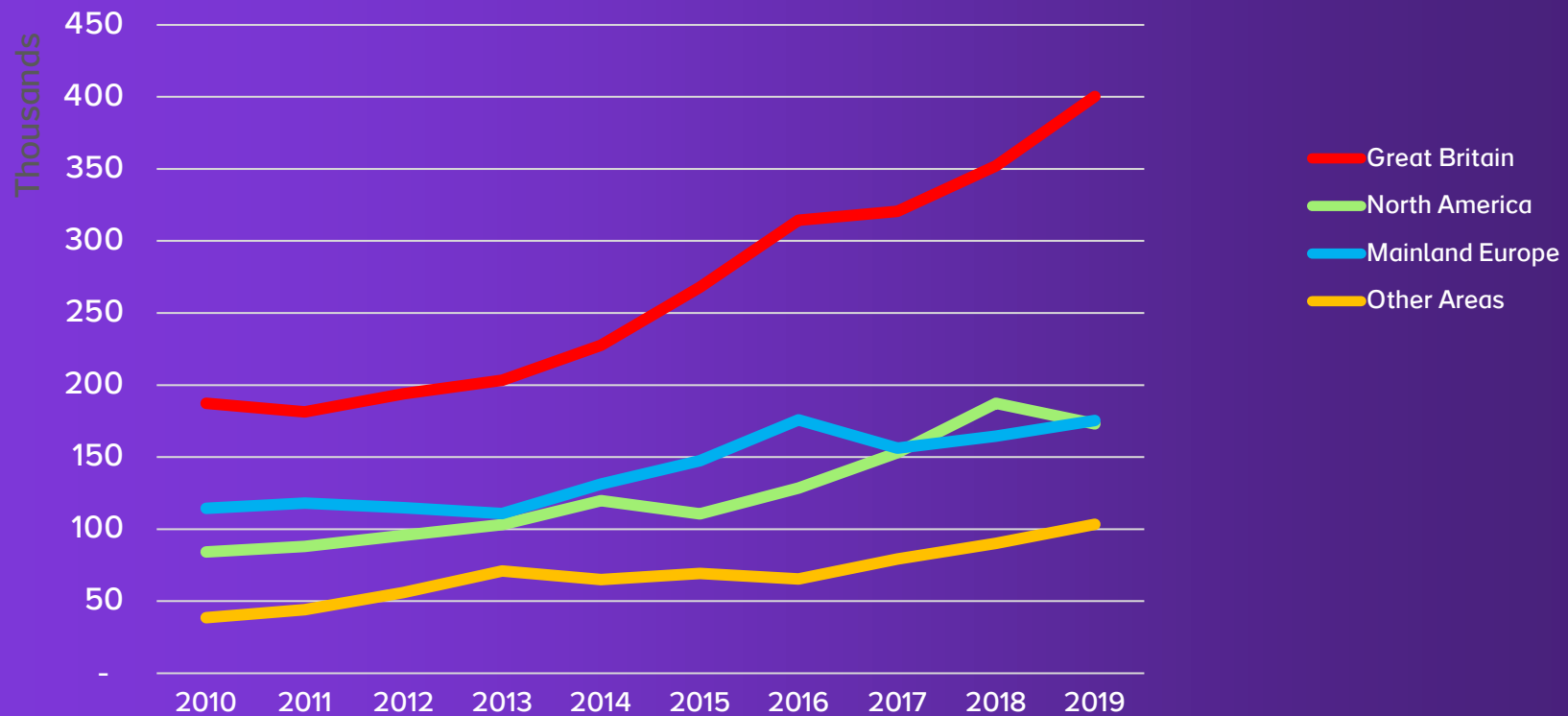
HOLIDAYS

HOLIDAY SPEND

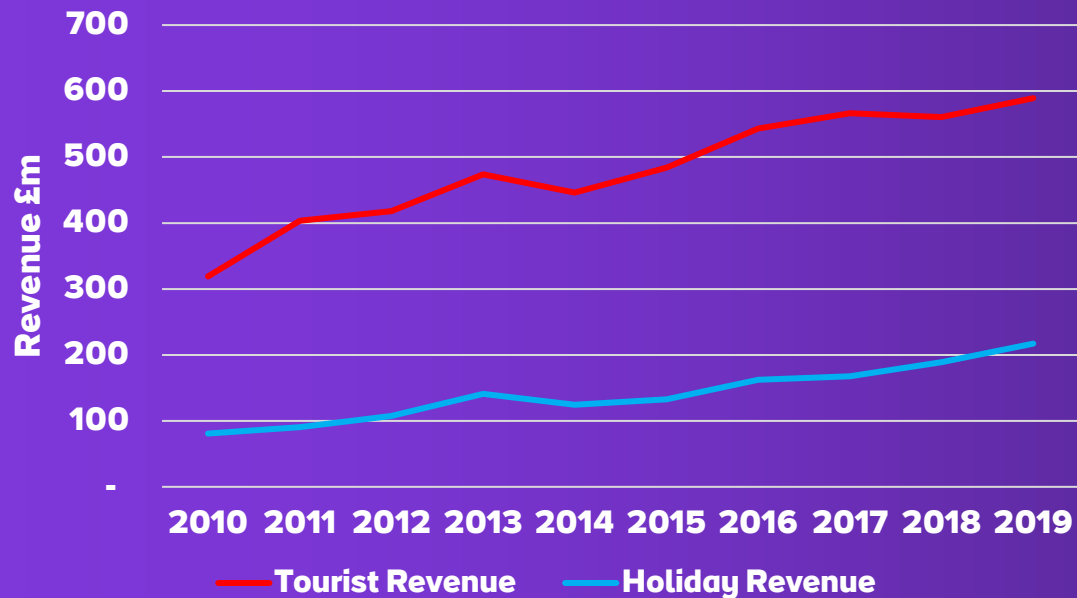
MAIN MARKET AREA TOURISTS TRENDED 2010-2019



HOLIDAYMAKERS TRENDED FROM MARKET AREAS 2010-2019



TOURIST AND HOLIDAMAKER REVENUE TRENDED 2010-2019



£589m

Visitor revenue

+85%

SINCE 2010

£217m

Holiday revenue

+168%

SINCE 2010

CURRENT OUTLOOK



2022 PERFORMANCE INDICATORS

Air Capacity

Current filing June 2023:
104% of 2019 levels

Rooms Occupied*

Jan-Nov:
101% of 2019 levels

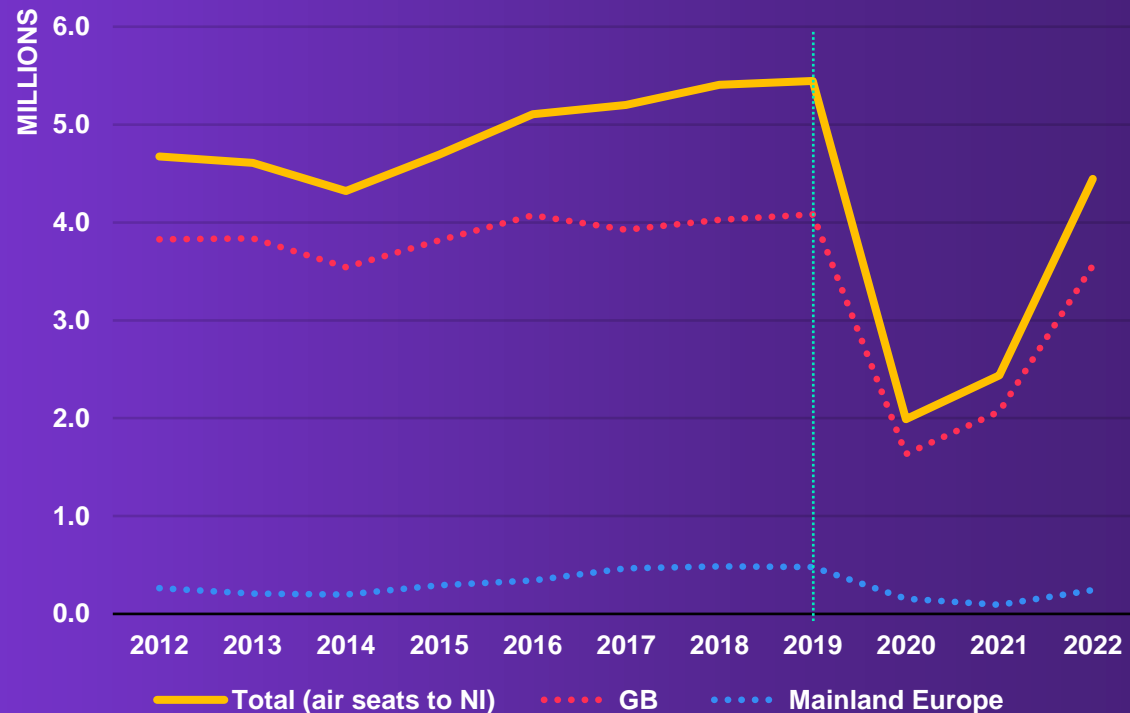
Average Daily Rate*

Jan-Nov **+27%**
£100 Since 2019

Tourism Forecast

as at Oct '22
71%

One-way air seats available to Northern Ireland 2012-2022



Tourist statistics are unavailable at present due to COVID-19. An attempt is made to assess proxy indicators.

Note: some indicators include domestic and inbound tourists (for example hotel occupancy)

* Source STR

STRATEGIC OPPORTUNITIES

Opportunities for long-term growth



NORTHERN IRELAND STRATEGIC OBJECTIVES

Support Northern Ireland to realise its tourism potential

**Enable the delivery of
the 10X strategy for
growth**

**Align NI strategic
development with
Tourism Ireland
strategy**

**Grow Northern
Ireland as a
holiday destination**

**Enable tourism growth
across the region**

**Deliver long-term,
sustainable growth for
tourism in NI**

**Support and
sustain access to
NI**

SHARED ISLAND

- Significant funding opportunity
 - €7M investment
- Focus on building synergy between two international compelling products:
 - Causeway Coastal Route
 - Wild Atlantic Way
- Opportunities to get involved will be developed
- Supporting guidance on potential Shared Island projects



PEACE PLUS

- New tranche of Peace Plus funding released in 2023
- Working with sister agencies to agree projects of scale
- Proposed projects will align to the overall strategic growth objectives for NI
- Support / guidance for potential projects



CITY AND REGION DEALS

- Development led by local authorities
- Offers huge opportunities to create new international quality tourism product and experiences
- Opportunity to reprofile and promote the tourism offer in NI
- Tourism Ireland aims to work with local authorities



STRATEGY HOUSE – NORTHERN IRELAND

Delivery for NI aligned to overall strategic vision

Sustainability

Luxury

**Golf – The Open
returns**

**Major Product
Developments**

**Passion Points:
music, screen
food and drink**

2023 AND 2024 PROJECTS

- Dedicated NI EAGS campaigns
- Belfast music showcase
- Good Vibrations – New York
- Twinning projects – sustainable growth
- Funding projects



Belfast
CITY OF MUSIC



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THANK YOU

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