Tourism on the island of Ireland



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Ana Desmond, Eoin Magennis &
Edward Hawkins

Ulster University

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Front cover image: Tramore Beach, County Donegal

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Executive summary

The tourism sector across the island of Ireland has re-emerged as a buoyant and resilient industry following the Covid-19 pandemic. Comparable data for Northern Ireland and the Republic of Ireland to 2019 demonstrates strong growth and successive record visitor numbers from 2013 onwards. The latest indicators used in the research and the industry consultations showcase an ability to bounce back from the very significant challenges that the global pandemic posed for the tourism industry. In sum, the sector provides almost €17 billion in GVA and supports over 300,000 jobs across the island.

The data points to strong recent performance by the tourism industry in Northern Ireland, but there are a range of performance gaps, leading to lower economic impact. Visitors to Northern Ireland are more likely to be visiting friends or relatives rather than on holiday or a business trip, and of those visiting friends and relations almost half will stay with them, considerably reducing the earned income from accommodation. Visitors from GB are crucial to both parts of the island, but the scale is different, they make up two thirds of visitors to NI compared to one third in the Republic. People also stay in NI for fewer nights, and this is particularly so for long-haul visitors. Taking these factors together, the Republic of Ireland had approximately 4.3 times as many trips by international visitors compared to Northern Ireland in 2019, but 7.6 times as much expenditure totalling a respective €4,874m in the South and €672m in the North. Looking at GVA generated by the entire tourism industry, including on-island tourism, in 2019 the tourism industry in the Republic of Ireland (€13.8bn) was 4.8 times larger than the industry in Northern Ireland (€2.9bn).

The scale of domestic tourism trips within NI, at roughly two million per annum, remained static in the decade from 2011, whereas, in the Republic, the scale of within-state tourism increased from 6.5m to 11m trips in the same period, probably reflecting the stronger economic performance, since the low point of the post-2008 crash. Notwithstanding, some public commentary that many people from the South never travel to NI, the number of trips by residents of the Republic to NI has increased dramatically over the past decade. In 2013, on average less than 100,000 cross-border trips were made per quarter compared to over 300,000 in 2023.

Cooperation on a cross-border basis on tourism has had a long history from the early 1960s up to an including the decision in 2000 to establish Tourism Ireland as one of the all-island implementation bodies. Deepening and widening of existing cooperation may have the potential to unlock long-term growth across the island. Much can be done in the short-term, possibly by leveraging the more developed sector in the Republic of Ireland, and perhaps benefiting from emerging capacity constraints there. The weaker performance to date is in-part a reflection of a lower starting point given the conflict and legacy of the Troubles in NI, but a stronger convergence is possible through a combination of greater alignment in public policies, higher levels of investment and changing external perceptions. This raises questions for further debate about the extent to which such regional convergence in the performance of the tourism industry could be expected to be enhanced by moving beyond the current levels of cooperation. That is, in the context of a single tourism offering, in marketing, visa-requirements, tax and regional development policy, and, perhaps most crucially, in the perception of the visitor. However, several of these policy areas are not devolved and would require changes by the UK Government, making the process more complex.

This report also discusses the contemporary issues experienced by industry stakeholders in a post-pandemic era including the labour market, infrastructure and connectivity, private sector investment, regional development and sustainability within the tourism sector.

Introduction

Across the island of Ireland, the tourism sector has become a buoyant and growing industry welcoming visitors from near and far to explore the culture, heritage and natural beauty the island has to offer. Growth in tourism began in earnest in the 1990s, firstly in the Republic of Ireland (ROI) and later in Northern Ireland (NI) as the Troubles came to an end. Since that time, with investment in connectivity and access, the tourism industry has grown in size and value, offering employment across a range of sectors and occupations and has, in turn, supported many local communities.

With the onset of the Covid-19 pandemic, tourism and travel activity was suddenly halted with mandated government restrictions on international flights and severe apprehensions about travel and safety. In part owing to extensive government support during this time, the sector has proved resilient bouncing back much quicker than initially expected. With the lifting of some government restrictions and while international travel remained complex and fraught with uncertainty, domestic travel became a desirable alternative. Many people took "staycations" in 2020-2021 and made in-state or cross-border trips to discover more of what they usually consider home, further supporting the industry during this turbulent time. As we emerge into a post-pandemic world with international travel resumed, understanding the dynamics of this recovery period, the current state of the sector and what challenges lie ahead is important in re-building and preparing the tourism industry for the future.

Tourism has long been an item proposed as a natural area for cooperation between Northern Ireland and the Republic of Ireland.[1] Not surprisingly it would become one of six areas of cooperation under the North/South Ministerial Council and it was agreed in October 2000 to establish Tourism Ireland Ltd as a new company to promote the island of Ireland overseas as a tourist destination. The new organisation was able to do this promotional work from the 2002 season onwards.

Tourism Ireland works with the two tourism development organisations on the island, Fáilte Ireland and Tourism NI, which are responsible for developing regional brands (eg: Wild Atlantic Way) as well as investing in the necessary infrastructure for the sector and supporting the development of the business base. The sector also engages with local government, a number of representative organisations to lobby for approximately 24,000 businesses, and a range of Further Education and Higher Education institutes who provide training for the industry.

The breadth of the tourism sector means it is felt throughout the economy and in this report there is a discussion of the 'core' and the 'wider' tourism impacts. There is a need to differentiate between the two as expenditure and activity by tourists contribute to the strength of various sectors. Extending beyond the 'core' parts of the sector – in accommodation and hospitality – to cultural activities, tour operators, visitor attractions, transportation with even wider knock-on impacts to sectors such as retail, shows how tourism has the ability to stimulate economic growth and job creation across the economy. In summary, this research concludes that the tourism industry across the island of Ireland supports in excess of 300,000 jobs and provides over €16billion in GVA to the economy.

However, growth in visitor numbers with all its economic benefit comes with the concern for sustainable development. As visitors flock to iconic destinations and natural wonders, the strain on cultural heritage sites becomes apparent across the globe. Balancing the economic benefits of tourism with sustainable practices (including how visitors come to the island of Ireland) is paramount to

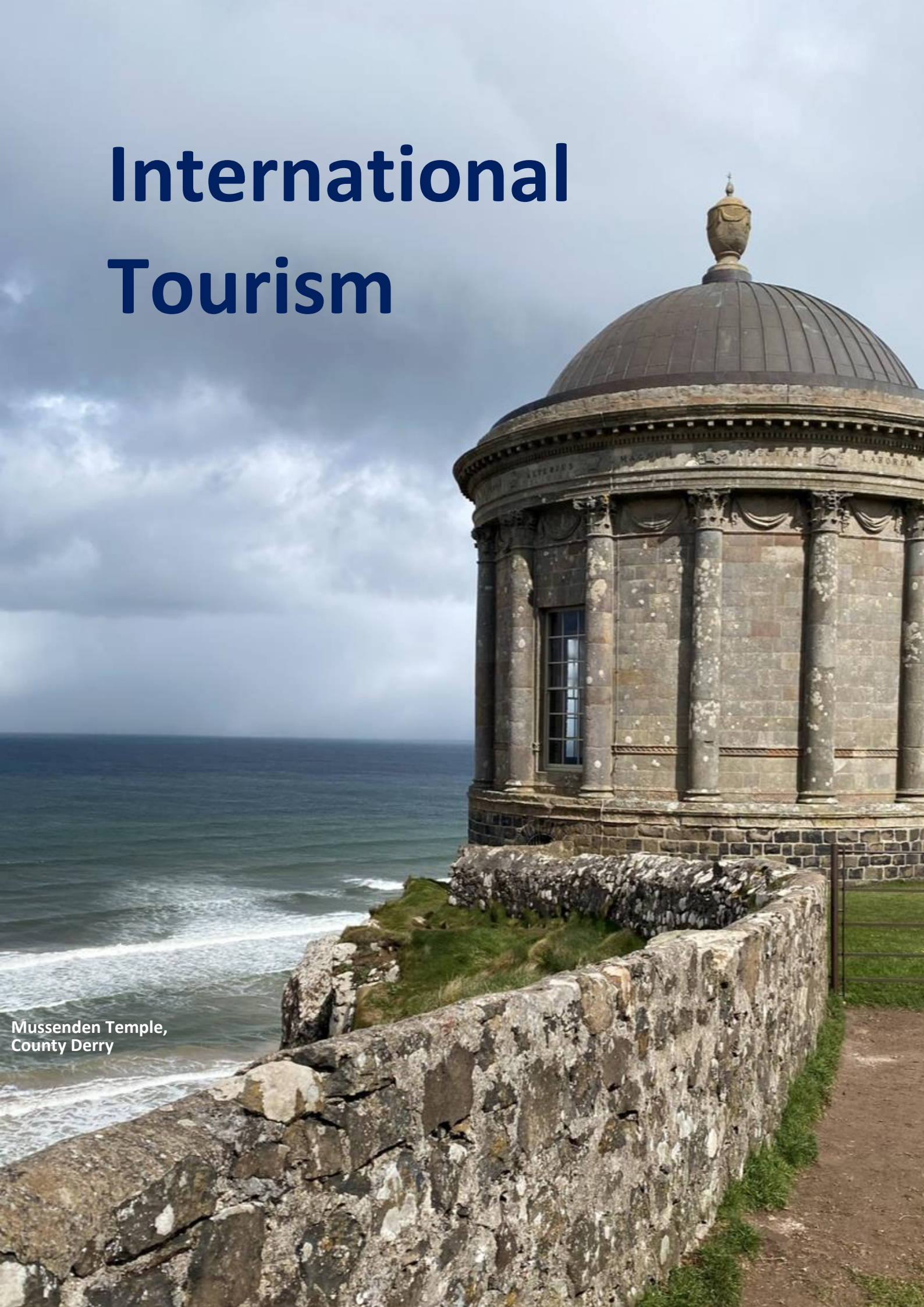
[1] By the time of the 1998 Good Friday/Belfast Agreement, tourism cooperation had been an item for North/South or British-Irish discussion for more than four decades.

preserving the island's natural beauty for future generations. There is a growing understanding how embracing sustainable tourism practices not only safeguards the environment but also enhances the visitor experience, ensuring that international tourists can continue to enjoy offerings for years to come.

With tourism being such a ubiquitous sector across most parts of the island, it is an important element in the broader research programme and so this paper aims to measure and analyse the relative performance of both NI and ROI to build a picture framing the value and relative strengths within an all-island tourism sector. Empirical work, facilitated largely through data from NISRA, CSO and Fáilte Ireland, is complemented by findings from the experiences from key industry stakeholders across the island, offering an insight into the challenges currently being faced by businesses operating in this sector and the wider economy.

This report compares the relative performance of the tourism industries north and south, their shared and differing characteristics, and their contribution to the economy. It concludes by discussing how the well-documented gap in tourism numbers and earnings between Northern Ireland and the Republic might be closed with appropriate policies and strategy. Finally, the report is a contribution of relevant North-South comparisons to better understand all-island tourism and the cross-border cooperation to date within the sector. As such, this report could provide context to the on-going economic debate on Irish Unity.

International Tourism



Mussenden Temple,
County Derry

1. International tourism

International tourists[2] play a crucial role in the all-island economy, injecting significant spending into local businesses and communities while they explore the island's diverse tourist sites. In NI significant growth in international visitors was experienced over the 2013-2019 period increasing by 33% to a total of 2.2 million trips in 2019. In ROI, growth was stronger still (46%) despite starting from a much higher base, leading to a total of 9.4 million external trips in 2019.

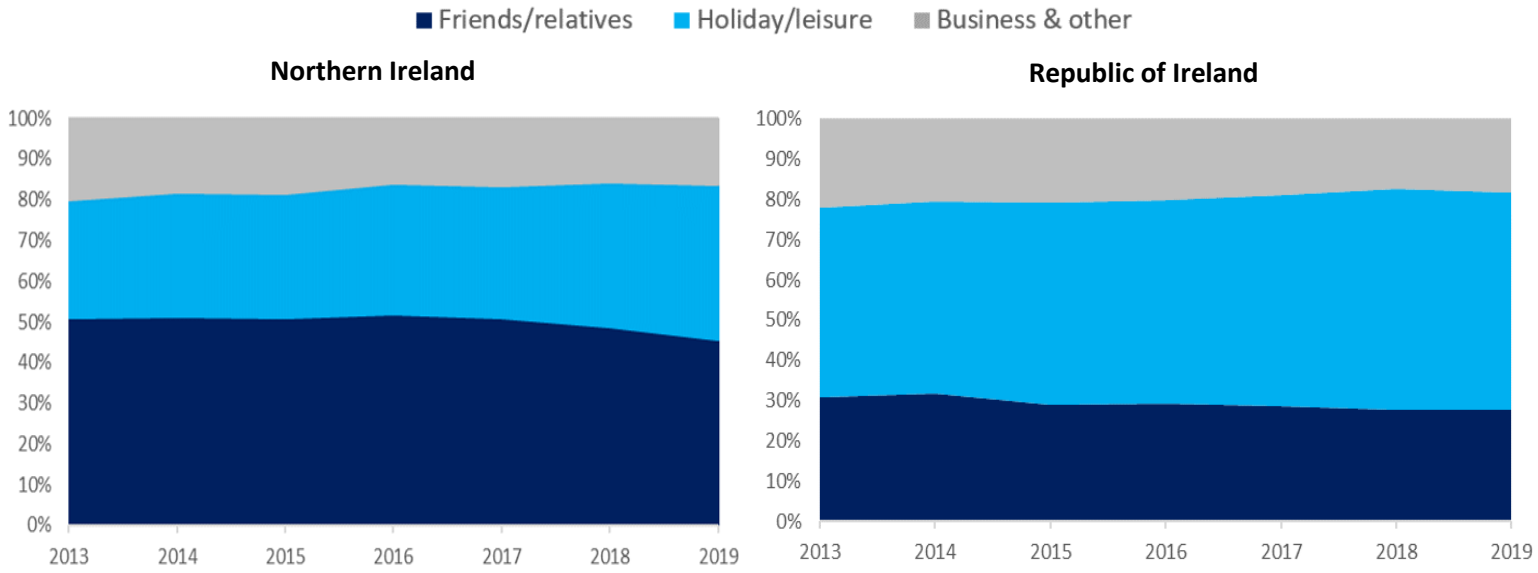
Northern Ireland had 1.17 international visitors per head of population in 2019, compared to 1.91 for the Republic of Ireland.[3]

The NI share of international visitors to the island of Ireland in 2019 was 19% and this proportion has remained steady since the 1970s, falling from 33% in the 1960s.[4]

1.1 Reasons for visiting

Figure 1 shows how the breakdown of trips to the two jurisdictions differ considerably and have also changed significantly over recent years. In NI the majority of **growth** in overall visitor numbers can be attributed to the rising number of holiday-makers, which increased by 75% in 2013-2019. This meant that holiday-makers accounted for almost 40% of all visitors in 2019. However, despite their overall share declining slightly since 2013, the largest proportion of visitors remains those who are visiting friends and family, who represent almost half (46%) of total visitors. This share is lower than it was in the 1980s, according to figures from the NITB, but has not moved greatly since the 1990s.[5]

Figure 1: Trips by reason for visit, NI & ROI, 2013-2019



Source: CSO, NISRA

[2] Defined as overnight visitors with an origin other than NI or ROI

[3] This is calculated using statistical estimates of population from NISRA and the CSO for 2019 against international visitor numbers. Using this approach Spain had 1.78 visitors per capita in 2019 and Italy 1.09.

[4] J. Deegan & D.A. Dineen, *Tourism Policy and Performance in Ireland* (London, 1997), ch.8.

[5] Ibid.

In ROI, holiday-makers account for the largest proportion of visitors (54%). 'Business and other' growth has been strong in ROI (20%) compared to just 9% in NI. Figure 1 also illustrates the change in visiting friends & relatives as proportions fall from 31% of ROI visitors in 2013 to 28% in 2019.

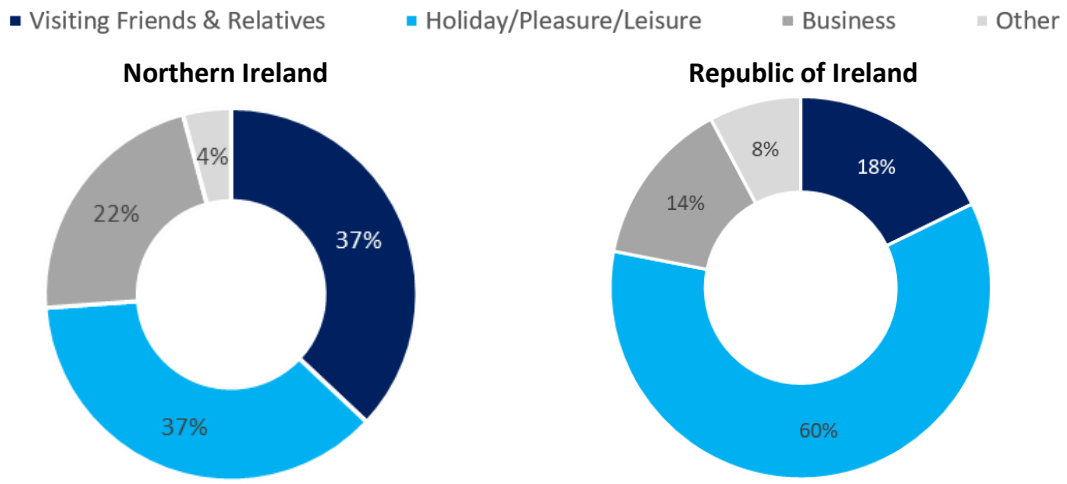
> ***"The next distinct challenge for us [in the Republic of Ireland] will be to further broaden the appeal to a younger holiday-maker travelling in small groups rather than with tours. Smaller hotels, self-booked accommodation and experiences are the attraction here"*** *– [C11]*

1.2 Expenditure by visitors

The economic impact of tourist spending can be substantial, encompassing various sectors such as accommodation, dining, transportation, entertainment and retail, injecting money into communities and stimulating economic activity. This influx of spending not only benefits businesses directly involved in tourism but also ripples through supply chains and service providers.

Figure 2 breaks down expenditure patterns again by reason for travel and shows the importance of holiday-makers to these patterns.

Figure 2: Expenditure by reason, NI & ROI, 2019



Source: CSO, NISRA

In both NI and ROI, those who are visiting friends and family account for a lower share of expenditure than of visitor numbers, implying a lower spend per trip compared to other reasons for visiting. In NI, holidaymakers account for largely the same proportion of expenditure as total trips (37% spend and 38% trips), whereas in ROI holiday makers account for 54% of total visitors but 60% of total expenditure. This points to a pattern where holiday-makers spend a greater amount in ROI than in NI – either (or both) through staying more nights or finding more to spend on. Although other factors such as the length of stay, discussed further below, and purchasing power within the area will influence levels of expenditure, the scale of spending in ROI compared to NI cannot be underestimated.

> ***In sum the Republic of Ireland had approximately 4.3 times as many trips by international visitors compared to Northern Ireland in 2019, but 7.6 times as much expenditure totalling a respective €4,874m and €672m.*** [6]

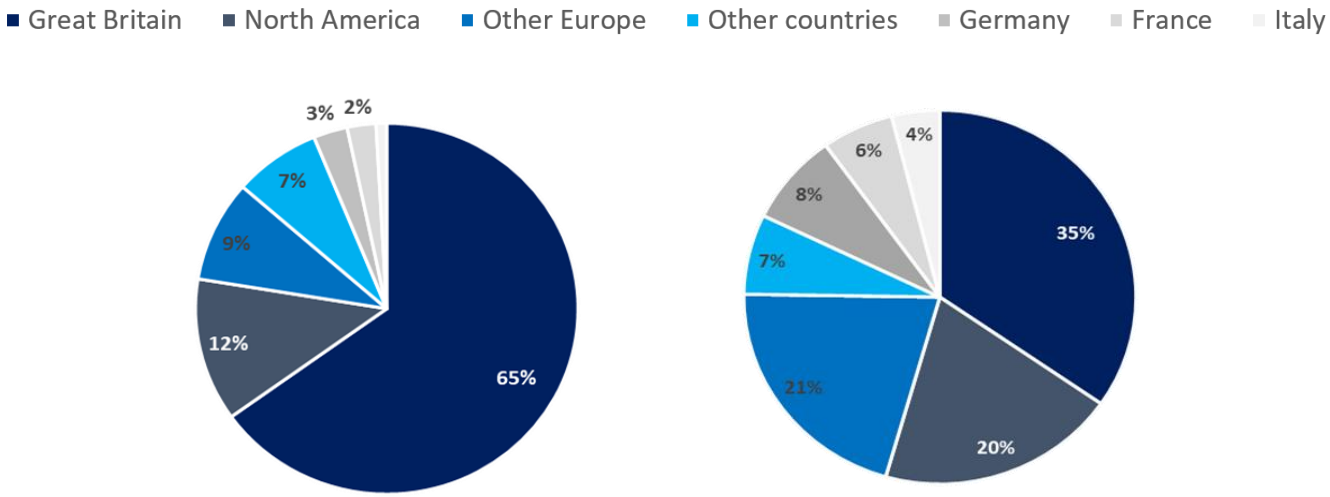
[6] Average exchange rate for 2019 applied to NI total expenditure to provide € value.

One important area – at least before the pandemic and something which is slowly recovering since then – is business travel. This represented a smaller proportion of trips, approximately 15% both north and south of the border in 2019. However, in NI relative spending has been higher, 22% compared to proportional expenditure in ROI (14%).

1.3 Origin of visitors

International visitors to NI and ROI can be grouped into seven broad countries or regions of origin, the breakdown of which is shown in Figure 3. Despite Great Britain (GB) being the leading market for both NI and the ROI, the size of the market share is considerably different. Visitors from GB account for approximately two thirds of trips to NI (65%) compared to just over a third (35%) in ROI. As a result, the market shares of North America and other parts of Europe are much smaller in NI.

Figure 3: Origin of overnight visitors (%), NI & ROI, 2019



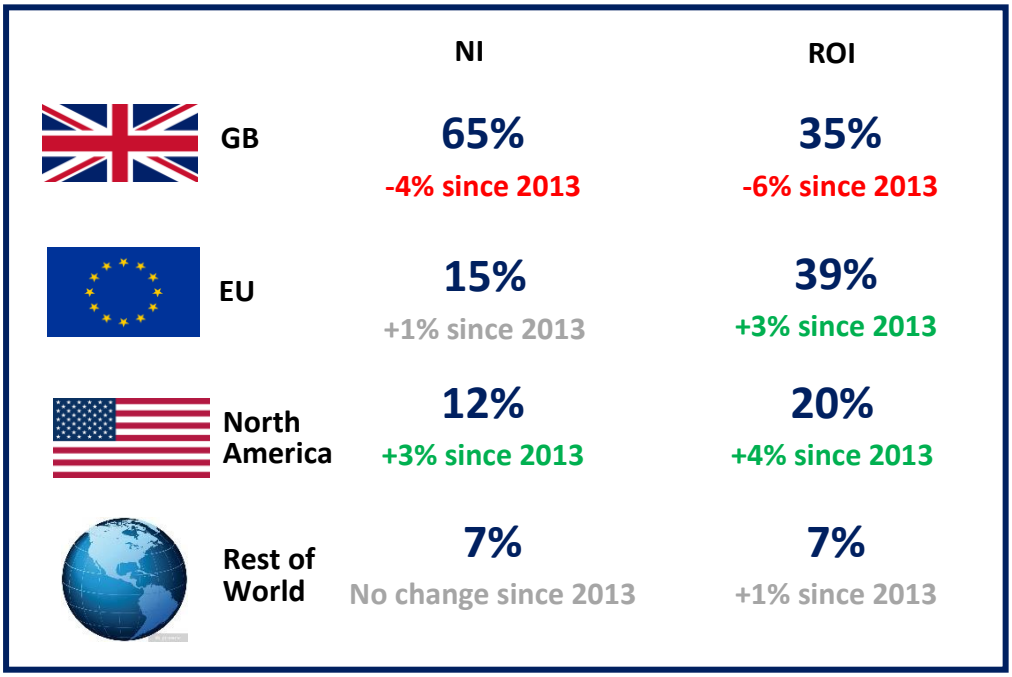
Source: NISRA, CSO

Although GB has been the leading tourism market for both NI and ROI for many years, its market share has been declining over time in both jurisdictions. Figure 4 depicts how the market share of different regions has changed between 2013 and 2019, namely with trips from North Americans (USA and Canada) and other European countries growing in relative size. The rate of change is faster in ROI than in NI, but both have lagged the level of diversification achieved by Britain and other competitor countries across the EU.

> ***"The European market wouldn't be as strong for us, pre-covid we had more visitors from Australia than Germany"*** *– [C2]*

> ***"We have seen only modest growth in the mainland European markets and a fall in the British market in recent years, though we believe that these remain under-developed for marketing as Ireland's share of outbound tourism from these markets is small"*** *– [C12]*

Figure 4: Share of overnight visitors, NI and ROI, 2013 vs 2019



Source: NISRA, CSO

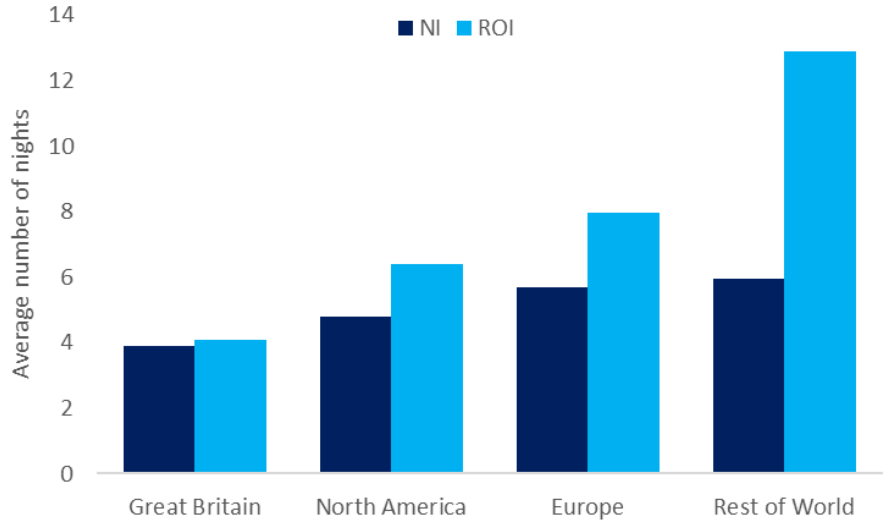
In addition, there is some debate (reflected in consultations) as to whether the 'nearby' markets have been fully developed in terms of the visitors that can still be attracted from GB and the EU. For example, The Department for the Economy's (DfE) *Tourism Strategy for Northern Ireland* identifies "four markets of primary focus", namely the NI domestic market, ROI, GB and North America. Influential factors include delivering sustainable growth and reducing environmental impact of visitors hence focus on closest geographical markets.

> ***"Efforts in the Republic to pivot further from the old reliance on the British market or, more to the point pivot towards the North American and Asian markets relies very heavily on availability of the very best quality in accommodation, food and attractions. There is probably an upper limit to this because of the need to have a year-round market"*** *– [C12]*
>
> ***"Would like to revisit Chinese, Asian market in general. There are certain things here they really like, flagship buildings like Titanic Belfast. They are also a good filler market in that they will come here in January-February"*** *– [C2]*

1.4 Length of stay and destinations of visitors

Although the NI tourism strategy identifies "visitors from the US and Canada tend[ing] to spend more and stay longer", Figure 5 illustrates that the average length of North American trips in 2019 was less than those of Europe and significantly less than Rest of World. Despite GB representing the largest share of trips to both NI and ROI, visitors have the shortest average length of stay (4 nights). Visitors from further afield naturally stayed for a longer period of time but spent notably less time in NI compared to ROI. The largest difference occurred in the Rest of World category where visitors stayed on average 13 nights in ROI compared to less than half that (6 nights) in NI.

Figure 5: Average nights per trip by origin, NI & ROI, 2019



Source: CSO, NISRA

> ***"NI is not recognised as a long break destination. People generally come for a day or night. We need to give them reasons to come for longer and therefore spend more." –*** *[C1]*

An important point to note is that, **over time, the number of nights spent in both NI and ROI has been gradually falling across all categories**, the biggest difference occurring in North American visitors to ROI where average nights have fallen from 8.2 in 2013 to 6.4 in 2019. The number of trans-Atlantic flights to and from North America almost doubled between 2013 and 2019[7], offering North American visitors more travel options including greater flexibility surrounding their length of stay. This decline mirrors longer-term trends since the 1990s in mature tourist markets such as Italy, Spain and France[8].

According to Tourism Ireland survey figures for 2019, international visitors to the island found that the 10.6 million holiday-makers tended to visit almost two different regions on the island each. The three regions most visited were Dublin (which welcomes 72% of holiday-makers), and Ireland's South West (30%) and West (26%). NI was visited by 15% of holiday-makers, typically in a combination with either the Dublin or Border regions.[9] As noted above NI has a smaller proportion of visitors relative to its size than the ROI.

A number of consultees made the point that it was out of their control whether visitors decided to come to NI when arriving into ROI.[10] They identified tour routes and tour operators as a factor that could be encouraged to increase visitor numbers to NI through routes encompassing NI and had worked on this over the years.

> ***"NI has become an easier 'sell' to international buyers and local tour operators over time but I'd feel there is much more to be done after working on this for more than a decade not only to promote the***

[7] CSO Aviation Statistics

[8] Data from United Nations World Tourism Organisation (UNWTO); Gossling, Scott & Hall (2018).

[9] Tourism Ireland, *Visitor Facts and Figure 2019* with insights from consultees (C6 and C13) on the combinations.

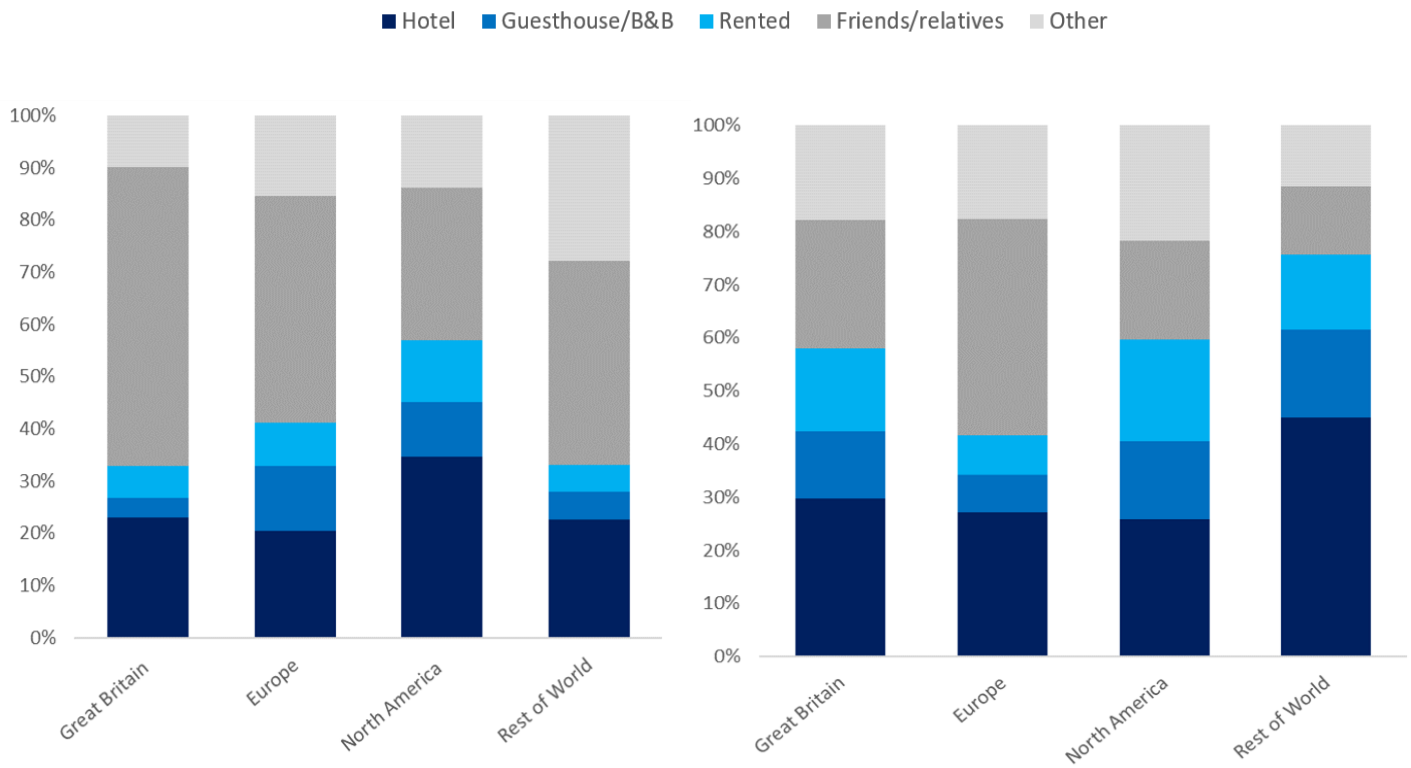
[10] Issues surrounding connectivity and ways to attract visitors to NI are discussed further in the report.

destination but also to develop the offerings that make it worth visiting." *– [C8]*

"We've developed touring routes that take in NI in recent years – Titanic Belfast and the Giant's Causeway have now had Game of Thrones added to the offering. But I've not seen an appetite yet for overnight stays which is always the next step." – *[C7]*

Regardless of their market of origin and where they visit, almost half of visitors to NI stay with friends and family (average of 43%), a far higher rate than visitors in ROI (26%) – see Figure 6. This north/south difference can be observed across all origins of visitor but is most notable with the largest cohort, i.e.: visitors from GB (57% vs 24%). Visitors to ROI from the Rest of World category (45%) stay in hotels at almost twice the rate of those visiting NI (23%), with this difference most likely due to the larger share of visitors to ROI travelling for holiday purposes, rather than primarily to visit family and relatives. This will have a knock-on impact on levels of expenditure by visitors as well as reflecting different levels of accommodation on offer.

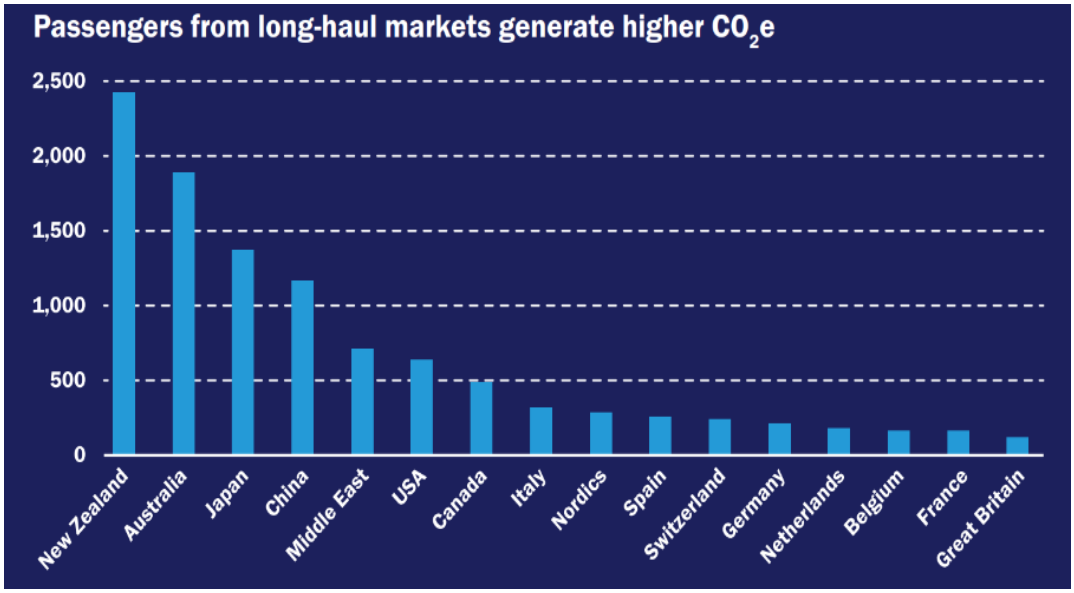
Figure 6: Type of accommodation used by origin of visitor, NI & ROI, 2019



Source: CSO, NISRA

In terms of future market development, Tourism Ireland has identified China, India and the Middle East as "emerging markets" as ROI looks to "continue to diversify into other markets". This focus is understandable as some of these countries and regions represent the fastest growing global tourism markets and are also associated with longer stays and higher expenditure. However, as shown in Figure 7, attracting visitors via long-haul flights may conflict with future net-zero commitments.

Figure 7: C02 airplane emissions to NI by country of origin



Source: DfE, Tourism Strategy for Northern Ireland

With regard to the development of sustainable practices more generally in the industry, the consultations found a range of views and how this might be delivered.

> ***"There is a cost to making your business more sustainable other than things such as making your building more sustainable so that you can sell it if you need to. Some markets do specifically look for this, they look for carbon footprint. Other than that there is no [government] support of a logical nature for you to make your business here more sustainable."*** *– [C2]*

> ***"As tourists will have an increased carbon impact getting here [NI] there has to be work done to minimise emissions when they are here. In the future tour operators may move to only use or support businesses with sustainability standards and there will be an expectation to make sustainability commitments."*** *– [C1]*

> ***"This cannot be under-estimated as a challenge for us on an island. The demands for sustainability are coming from the consumers and the tour operators and agents so we will have to think our way through this and hopefully with support from public bodies."*** *– [C7]*

The theme of sustainability is also revisited later in the report with regard to the cost of doing business.

Finally, there is the question of levels of repeat business. Tourism Ireland data suggest that as many as one third of international visitors are at least open to a return to the island of Ireland. GB visitors have been identified as the market most likely to book return visits to both NI and ROI. Another aspect of this is that repeat visitors are perhaps more likely to go beyond the initial attractions. For example, the DfE strategy has prioritised encouraging repeat visitors to "explore other parts of NI outside of Belfast" to develop inclusive tourism growth across NI. Fáilte Ireland take a similar view in developing the regional tourism markets. A key element of this is the profiling of visitors by tourism providers, something that remains at an early stage.

"We are probably leaders in this part of the market as so much of our [hospitality] business relies on the good impression and willingness to return and recommend. This brings its own pressures (around reviews, etc) but knowing what your customer wants can ensure a return. It is something the wider industry needs to improve on." – *[C5]*

"This is all about data and it is still too hit and miss." – *[C13]*

1.5 Accessing the island - Air and sea passengers

Aviation travel has been growing steadily across the island with passenger volumes increasing on average by 1% per year since 2005. In 2019, over 47 million passengers travelled through nine main passenger airports, across NI and ROI. During the pandemic, restrictive measures including border closures, quarantine protocols, and stringent testing requirements resulted in reduced confidence in overseas travel. Passenger numbers dropped by 77% between 2019 and 2020. By 2022, passenger numbers returned to 83% of pre-pandemic volume, however the recovery experience has differed either side of the border.

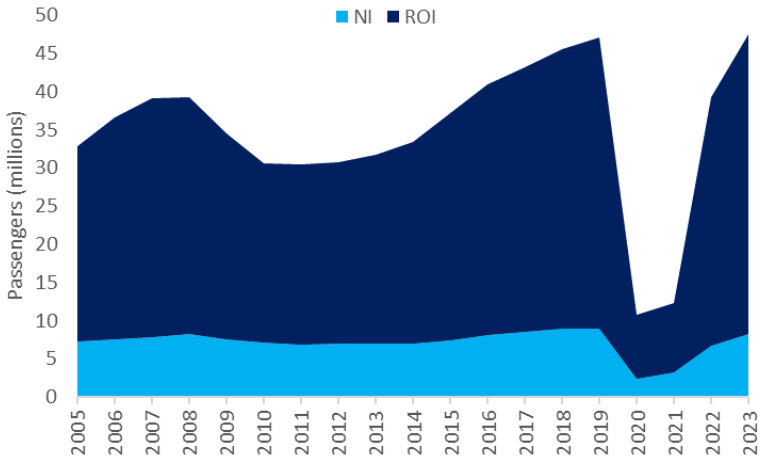
Figure 8: Passenger airports on the island of Ireland



Source: Civil Aviation Authority (CAA)

As shown in figure 9, passengers into ROI airports account for the large majority (83% in 2023) of total air passengers through the island of Ireland. However, with a wider variety of travel destinations, passengers arriving and leaving NI, may choose to utilise Dublin airport in the same way that mainland GB airports can be used to access destinations further afield. Pre-pandemic growth was especially strong across 2012-2019, with annual average growth of 6%. This growth was driven particularly by Dublin airport, which recorded 8% annual growth over the period. Since 2005, Dublin airport has facilitated the largest proportion of passengers across the island, during this time its share of total passengers increased from 56% to 70% in 2023. This increase was largely at the expense of Shannon but also Cork airport, which correspondingly experienced 6 and 2 percentage point decline in share of total passenger numbers.

Figure 9: Total airport passengers, NI & ROI, 2005-2023



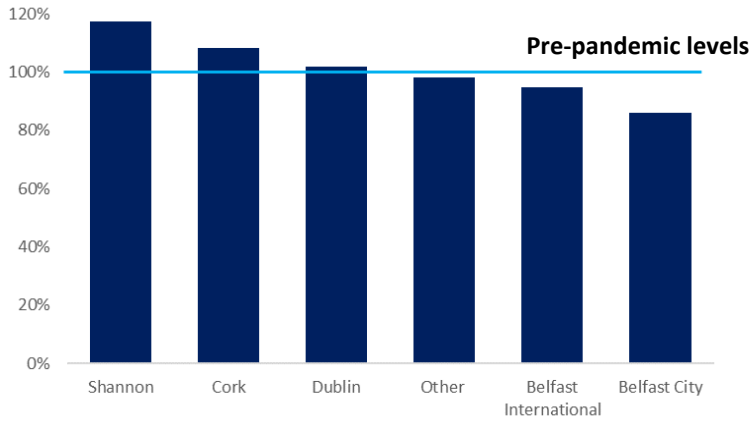
Source: CAA, CAO

Focusing on the five largest airports in Ireland, those based in NI lag behind ROI airports when comparing the return to pre-pandemic passenger numbers, with ROI surpassing pre-pandemic volumes (103% of 2019) compared to 92% in NI. When coupled with a lower number of passenger flights in the first half of 2023, these latest figures depict a strong recovery in ROI.[11] In NI, passenger flows remained approximately 14% below 2019 levels in 2023[12], an improvement from 2022 but still tailing ROI's performance.

Figure 10: Passengers volumes, NI & ROI airports, 2023

Airport	2023 passengers
Dublin	33,259,960
Belfast International	5,957,060
Cork	2,797,840
Belfast City	2,115,150
Shannon	1,897,600
Other	1,424,190

Figure 11: Passengers volumes (2023) compared to 2019, NI & ROI airports



Source: CAA, CSO, UUEPC analysis
Note: Other includes Knock, Kerry, City of Derry and Donegal

[11] CSO aviation statistics Q2 2023
[12] Tourism Northern Ireland – August 2023 Performance update. Also includes City of Derry airport performance.

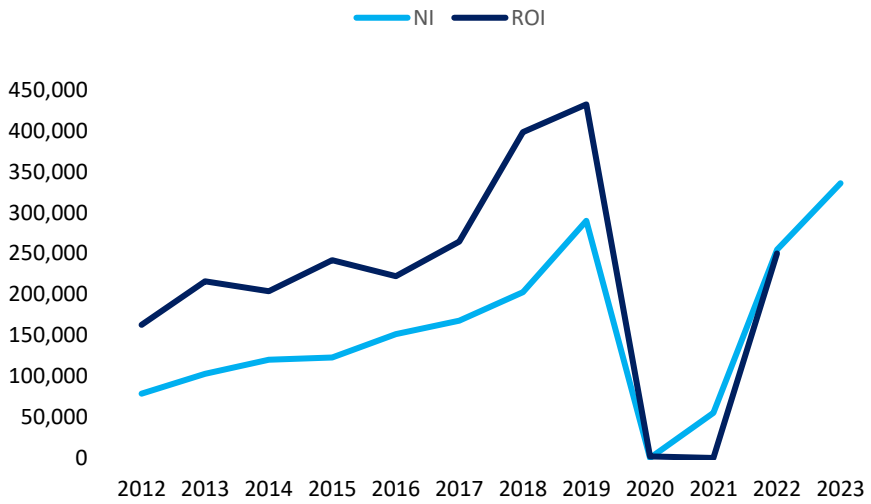
Sea passenger access, particularly through cruise ship dockings, holds immense significance for any island, including Ireland. Serving as a gateway for tourists, sea ports provide an alternative method of travel, complementing arrivals by air and expanding accessibility for travellers seeking to visit and explore the island. Beyond transportation purposes, cruise passenger access fosters economic opportunities through showcasing Ireland's unique attractions to a global audience who might not have considered visiting otherwise. Hence, cruise ship arrivals play a crucial role in enhancing Ireland's tourism industry and contributing to its economic growth and cultural exchange.

It is recognised that passengers may arrive by ferry from GB or Europe however this report has focused on cruise ship numbers and passengers as this prioritises direct tourism footfall and enables comparisons between NI and ROI.

Depicted in Figure 12, annual growth in cruise passenger numbers throughout 2012-2019 was strong in both NI (21%) and ROI (15%). However, ROI's growth was from a much higher initial base, receiving approximately 50% more cruise passengers than NI, in 2019. Both regions experienced peak activity in 2019, with NI recording 167 cruise calls[13] (290,000 passengers and crew) and 315 cruise calls in ROI (432,000 crew and passengers)[14]. However, owing to a strong post-pandemic recovery, NI surpassed this figure in 2023 receiving approximately 336,000 passengers.

Largely equal numbers of cruise passengers were reported in both NI and ROI in 2022, owing to major construction works in Dublin Port impacting capacity. The loss of Dublin Port as a berthing terminal for the largest cruise ships had a big impact on passenger numbers but had less of an impact on actual calls of ships. That is, NI had 92 less cruise calls than ROI (148 & 240 respectively) yet there was only a disparity of around 5,000 passengers. outlining how NI was berthing ships with a much higher capacity due to Belfast's recent investment in their Harbour, while ROI could only berth smaller ships (mainly into Dun Laoghaire as opposed to Dublin port).

Figure 12: Cruise passenger and crew numbers, NI & ROI, 2012-2023



Source: CSO, NISRA, Cruise Belfast, Cruise North West
Note: For NI figures, official NISRA figures for NI are used for 2012-2019, for 2021-2023 a combined total of Belfast and Foyle Port stats are used to create NI total. In previous years this has equated to 97%-100% of total NI number.

[13] A cruise call is where a ship visits a port to allow passengers to embark/disembark
[14] Duplication of docking numbers may occur if a cruise liner is visiting both NI and ROI

Belfast Harbour has hosted many famous cruise liners over the past decade helping it grow into the cruise destination that it is today. In 2023, 95% of cruise ship passengers in NI arrived into Belfast Harbour. Cruise Belfast, a partnership between Belfast Harbour and Visit Belfast, estimates that over £20m was injected into the local economy through passenger spending[15] equating to an approximate spend of £60 per passenger per visit. Foyle Port, uniquely situated where tendering can be made into both Northern Ireland (Magilligan Point) and the Republic of Ireland (Greencastle), received the remaining 5% of cruise passengers into NI.

In 2019, Belfast Harbour invested £500,000 to create Ireland's first dedicated cruise terminal with an additional extension in 2021 to help cruise lines facilitate baggage handling, security scanning, and passenger processing for turnarounds. Cruise turnaround days are where one journey finishes, and all passengers disembark while another group of passengers begin their journey and board the same ship. It can be economically beneficial to the surrounding area for a port to be able to accommodate a turnaround day[16]. A range of shore excursions are available for cruise passengers who are docking in Northern Ireland for the day including[17]:



Consumer sentiments gathered in September/October 2021 were extremely positive with 98% of cruise visitors reporting they were very satisfied with their visit. Additionally, 93% were visiting Belfast and NI for the first time and of those 99% said that they would be encouraged to visit again[18].

In ROI, there are ten different terminals available for cruise ships to berth[19]. From 2010-2019, Dublin and Cork received between 40-55% of all ROI passengers each as shown in Figure 12. Due to extensive construction and subsequent capacity constraints discussed below, Dun Laoghaire, just over 7 miles from Dublin port, increased its share of passengers from 1% in 2019 to 32% of all ROI passengers in 2022.

[15] https://cruise-belfast.co.uk/article/belfast-to-welcome-a-record-170-cruise-ship-calls-in-2023/

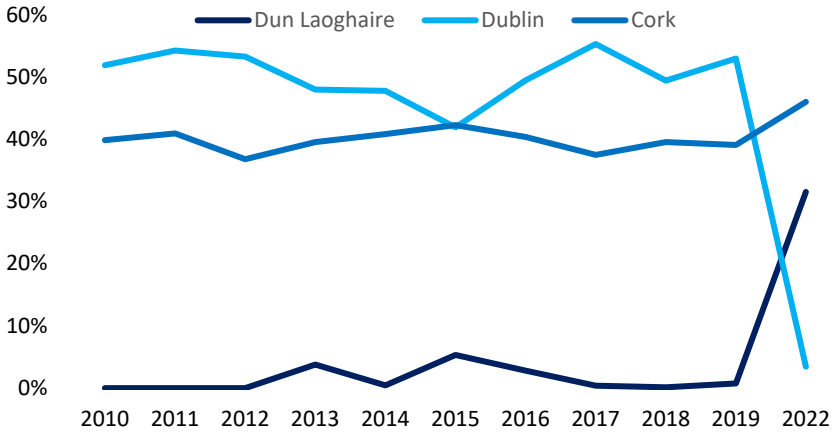
[16] https://www.itf-oecd.org/sites/default/files/cruise-shipping-urban-development-dublin.pdf

[17] https://belfastcitysightseeing.com/shore-excursions-cruise-ship-visitors/ - not all of these options are available when docking outside of Belfast

[18] https://visitbelfastpartners.com/app/uploads/2023/01/VB-BP_2022-23-Shortened.pdf

[19] These include: Dublin, Cork, Dun Laoghaire, Galway, Waterford, Killybegs, Bantry Bay, Shannon Foynes, Rosslare & Castletownbere.

Figure 13: % of total ROI cruise passengers & crew, selected ROI ports, 2010-2022



Source: CSO

At present, redevelopment is underway to increase capacity for cruise ship liners in Alexandra Quay West, a multi-purpose cargo berth in Dublin Port that accommodates larger ships. As a result, Dublin Port Company (DPC) have limited the number of cruise calls to 80 per year between 2021-2023, with DPC plans to return to normal service by 2024. Initially there were plans to develop new berths at North Wall Quay Extension (NWQE), however this was halted following public consultations with a large proportion of these concerns relating to environmental impacts.[20]

Sustainability is becoming increasingly important in the cruise industry and both NI and ROI ports are considering environmental impacts within their operations. Dublin Port have also committed to prioritising sustainability, signing the Agenda 2030 by AIVP (International Association of Ports and Cities) in October 2023, which commits to sustainable Port City development and climate change adaptation. Cruise Belfast is also collaborating with their key stakeholders ''to deliver greener choices and more sustainable experiences for visiting cruise lines and their guests''[21].

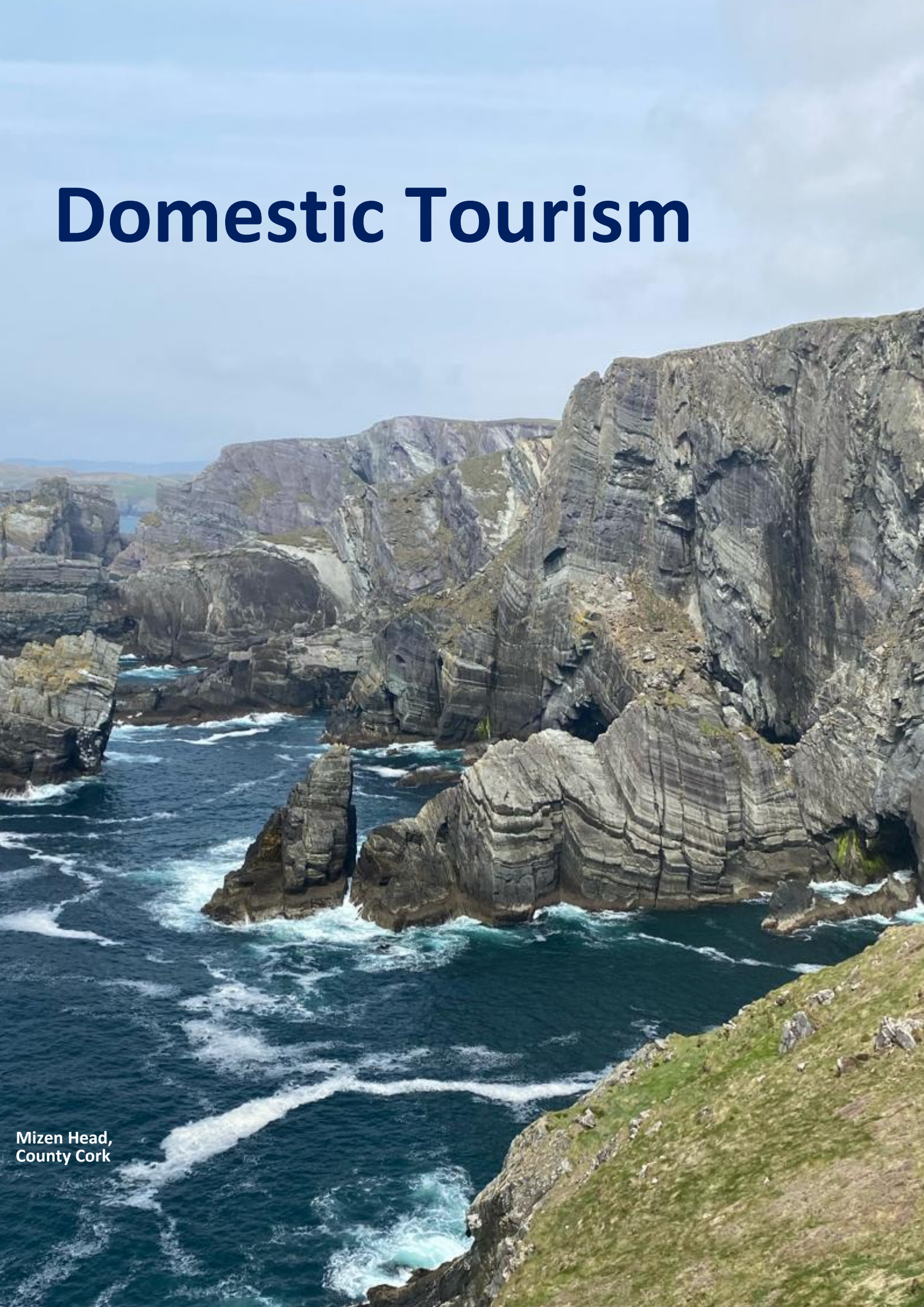
Across all types of travel but particularly in the cruise ship industry, the environmental impact of visitors arriving to the island of Ireland will need to be weighed up against the economic benefit. This argument is particularly compelling when looking at the low economic spend of cruise ship visitors. However, in Northern Ireland cruise ship travel is utilised as a tool for raising awareness of NI as a travel destination, something which is perhaps less necessary in ROI which is more established on the international stage.

Figure 14: Summary table of passenger journeys

	NI	ROI	All island
Number air passengers (2023)	8.2m	39.2m	47.5m
2023 air passengers as % of 2019	92%	103%	101%
Number of cruise ship passengers & crew (2022)	255,000	250,100	505,100
2022 cruise ship passengers & crew as a % of 2019	88%	58%	70%

[20] https://www.dublinport.ie/wp-content/uploads/2020/07/21364_DPC_Cruise_Consultation_Report_2020_V2.4_Screen%E2%80%A2.pdf
[21] https://cruise-belfast.co.uk/app/uploads/2023/08/Cuise-Belfast-Sustainability-Strategy-23.pdf

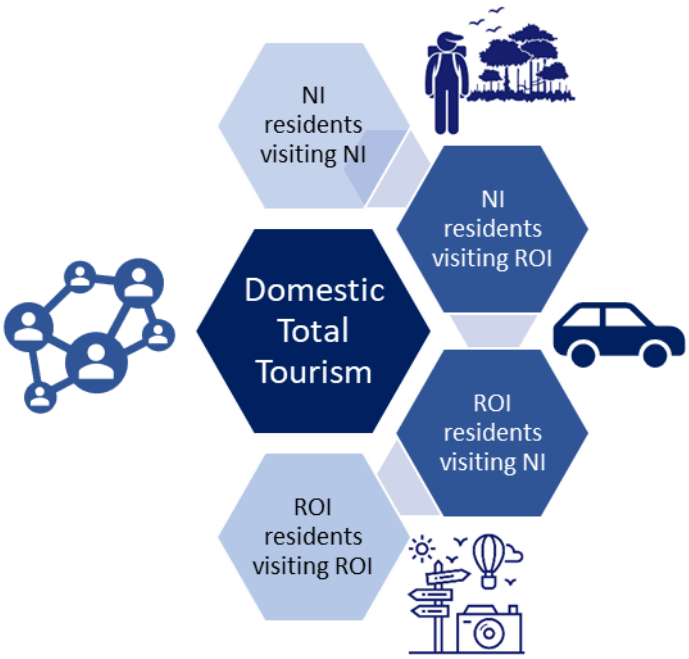
Domestic Tourism



Mizen Head,
County Cork

2. Domestic tourism

In the wake of the Covid-19 pandemic, domestic tourism provided a foundation of economic stability within the tourism industry during uncertain and unstable times. The pandemic was also a reminder to the sector of how important the on-island visitor market is. For the purpose of this report, domestic tourism is broken down into four different subsections as outlined below:



Domestic tourism has something of a mixed press. This might be summed up by the lament in the 1980 Northern Ireland Tourist Board annual report, that "many Northern Ireland people do not feel they are 'on holiday' unless they have got on a boat, caught a plane or crossed a border".[22] It is true that NI and ROI residents take more trips off the island than on and certainly spend a significant greater number of nights away than they do at home. At the same time, in 2019, approximately 16 million domestic tourism trips were made across the island, representing 61% of all visits taken to or on the island. By 2022 the number of domestic trips had increased to closer to 18 million. The growth has happened in an uneven fashion, if we look back more than a decade to 2011. While domestic tourism in NI has barely moved from the two million trips taken by NI residents, ROI residents have added on 4.5 million trips to stand at more than 11 million in 2019.

The other debate about domestic tourism is impact. It has the ability to boost local economies by supporting small businesses, creating jobs and fostering regional prosperity. It can help develop a sense of identity and encourage residents to explore and appreciate the cultural and natural treasures across the island of Ireland. However, domestic tourism and this would include cross-border visits if an all-island view is taken, are not regarded by economists as additional spending unless domestic tourism is replacing holidaying abroad. What it can mean is a transfer of spending from one part of the island to another. As shown below, cities and coasts are the most favoured visiting places for domestic tourists.

[22] Quoted in Irene Furlong, *Irish Tourism, 1880-1980* (Dublin, 2009), p. 157.

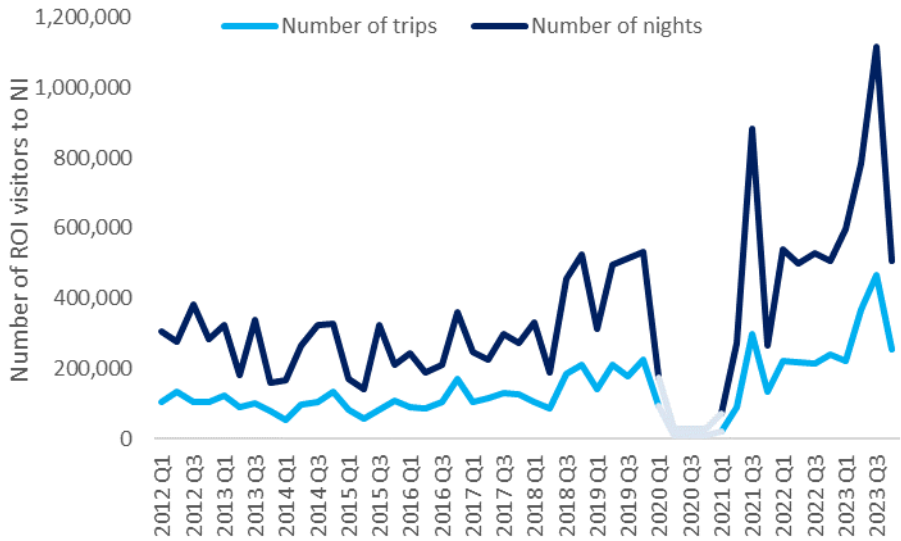
2.1 Cross-border tourism

The CSO's Household Travel Survey resumed in Q1 2021, following a break of three quarters in the series due to Covid-19, and provides an overview of the contribution of domestic tourism to the post-pandemic recovery. With regard to cross-border patterns, Figure 15 offers an insight into the visits from NI to ROI. The number of trips by ROI visitors to NI had been steadily increasing from Q1 2013, accounting for approximately 120,000 trips per quarter until the onset of the pandemic. However, with the rise in general 'staycations' across the island and further driven by lockdown restrictions easing in NI sooner than ROI, the number of ROI visits to NI increased sharply to a record level of ROI visitors in NI of 298,000 in Q3 2021.

The number of trips have held up well following that initial surge and have continued to exceed pre-pandemic figures, averaging over 200,000 trips per quarter since the easing of restrictions. Visitor levels peaked further in Q3 2023 at almost half a million (465K) visitors, driving the overall 2023 performance which saw almost 50% more visitors than in 2022. However, it is striking that despite the number of trips increasing substantially, the number of nights spent on a cross-border trip has remained largely the same pre- and post-pandemic. This has stayed at approximately 2 nights per trip, peaking at 3-3.2 nights per trip in the initial easing of restrictions in Q1/Q2 2021.

> ***"Our latest industry review showed that businesses in NI were pleasantly surprised at how cross border demand had held up in 2023."*** - [C1]
>
> ***"The success of cross-border tourism for the NI market is a great example of curious, first-time visitors setting down a path that could lead to plenty of repeat business given what is on offer"*** *– [C9]*

Figure 15: Number of trips and nights by ROI residents to NI, Q1 2012 – Q4 2023



Source: Household Travel Survey, CSO
Note: The figures for Q1-Q3 2021 are estimates and included here for illustrative purposes.

The CSO data complements sentiments from industry with 42% of businesses within the tourism sector in NI reporting growth from ROI markets between January – September 2023[23].

[23] Tourism NI Industry Survey November 2023 Report

"We had always known about the southern market but we really saw the value of the Republic following the pandemic." - [C2]

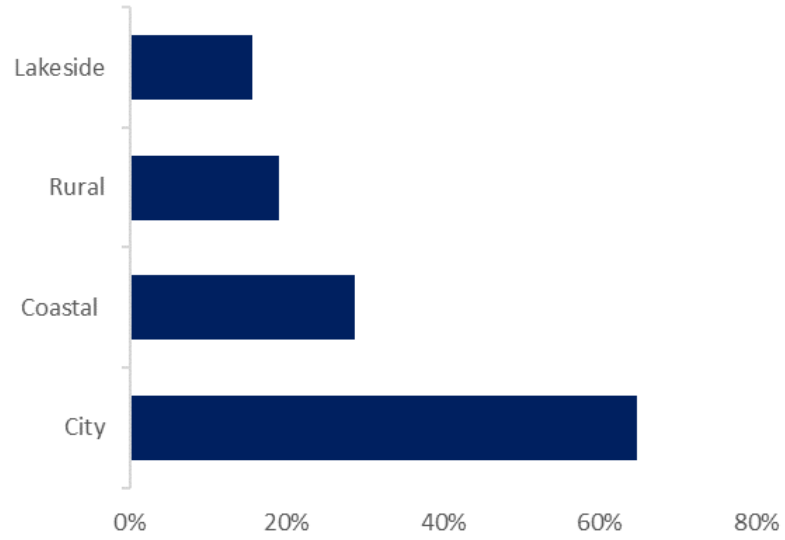
The increase in expenditure by ROI visitors following the pandemic outpaced inflationary pressures which were themselves exceptionally strong at the time. Between Q4 2022 and Q4 2023 the estimated expenditure per trip averaged €230, an increase of 22% from the same period in 2018/19. Total expenditure amounted to €308m during 2023.

Tourism NI Consumer Sentiment analysis highlighted why ROI residents chose to come to NI with the top 4 motivations highlighted below:



Further insight into motivations can be found in the types of trips and destinations that ROI residents were potentially interested in. Figure 16 shows how city breaks are the most popular type of trip considered, increasing further in popularity across 2023. Lakeside destinations are the least popular however, unusually high amounts of blue/green algae was found in the Fermanagh Lakelands area during 2023 which led to a reduced offering of activities which potentially limited the popularity of this type of travel destination[24].

Figure 16: Types of destinations considered for upcoming trips by ROI residents to NI, 2023 average

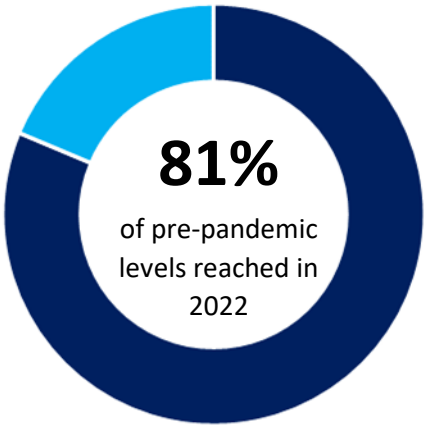


Source: Tourism NI Consumer Sentiment Analysis
Note: Figures may sum to more than 100% as participants may choose more than one option.

[24] Lack of data prior to 2023 makes this difficult to statistically confirm

Before the pandemic, in the 2013-2019 period, the number of trips by NI residents to ROI had been steadily decreasing since 2014[25]. Figure 17 highlights the recovery of visitor trips to 81% of pre-pandemic levels in 2022.

Figure 17: Trips by NI residents to ROI, 2022 as a % of 2019 trips



Source: NISRA

The number of trips made to ROI by NI residents totalled 1.7m and 1.4m in 2019 and 2022 respectively. Trips to ROI still accounted for a quarter of all trips made by NI citizens in both 2019 & 2022. The number of nights spent in ROI accounts for a smaller 16% share of all nights spent away by NI residents, as the average length of stay NI residents spend in ROI is approximately 2.6 nights.

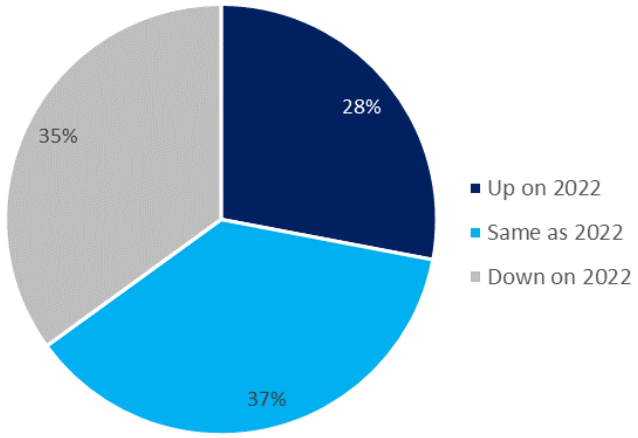
Survey findings from Fáilte Ireland's Barometer show that 65% of businesses found the volume of NI visitors in 2023 was the same or greater than 2022. This was, however, unequally shared across different tourism enterprises, "up for 64% of hotels and 52% of attractions but down among caravan parks, activity providers and food & drink operators."[26]

> ***"The NI visitor came back strongly we feel in the years after 2020 and the numbers have held up but we're seeing a change in age groups with more younger people visiting the coasts and plenty of older customers taking hotel breaks"*** - [C9]
>
> ***"We've had very strong demand in the last two years [2022 and 2023] from NI visitors and increasingly in the off-season, for long weekends and so on"*** - [C11]

[25] A change in data collection methodology from NISRA in 2019 prevents direct comparison between pre-2019 and post-2019 figures.

[26] This refers to the domestic market which includes visitors from NI and ROI

Figure 18: Business views on the volume of visitors from NI in 2023 compared to 2022

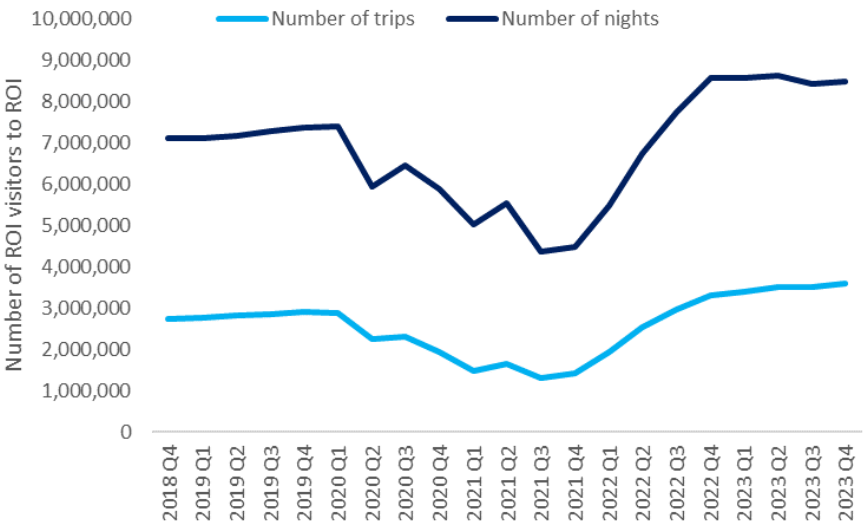


Source: Fáilte Ireland Tourism Barometer

2.2 In-state tourism

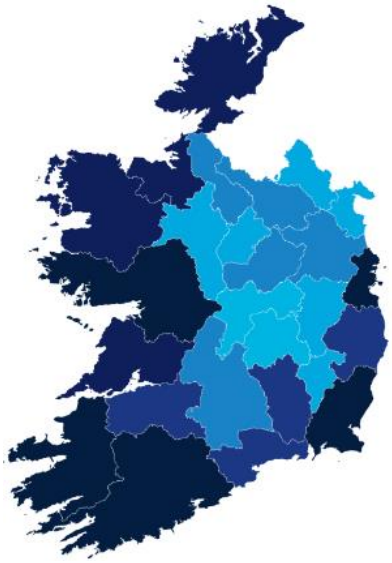
In-state tourism – or visits by ROI residents within the ROI – has greater seasonal fluctuation than cross-border tourism, typically peaking in Q3 of each year encompassing the key summer months (July, August, September). For this reason the data in Figure 19 uses a 4-quarter rolling average. Two features of note stand out. First, that women are more likely than men to engage in overnight trips (54% vs 46%). Second, that the momentum from domestic tourists after the pandemic has continued to build as new record numbers of trips and nights away have been set in 2022 and then 2023, following an arguably slower post-2020 recovery. This optimism is echoed by Fáilte Ireland, where 42% of businesses report that local visitor volumes were higher in 2023 than in 2022, with a further 28% reporting that levels remained the same as 2022.[27]

Figure 19: Number of trips and nights by ROI residents within ROI, Q4 2018 – Q4 2023



Source: CSO
Note: Figures refer to a 4-quarter rolling average

Figure 20: Proportion of trips by ROI residents by county, 2022



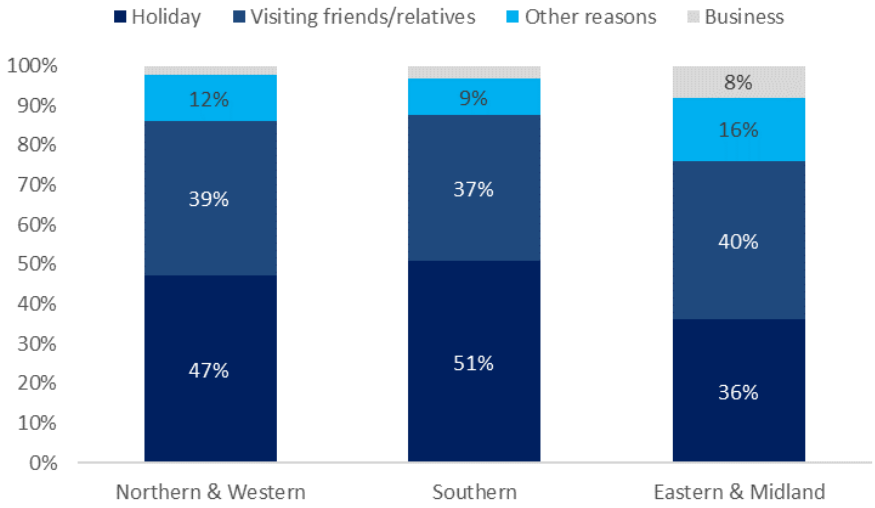
Source: CSO

[27] Fáilte Ireland Tourism Barometer January 2024

In terms of destinations for visitor trips, Figure 20 illustrates the South East and South West as the most popular destinations in the ROI with trips to Wexford, Cork and Kerry accounting for almost 30% of total visits in 2022. When looking at the number of nights spent on trips, the South West also had a marginally higher number of nights per trip (2.7) compared to the national average (2.4), this trend is well established with pre-pandemic figures also showing the same pattern. In general, as the map shows, coastal areas and the cities within these are the most-visited areas.

Holidays are the biggest motivator for in-state tourism in ROI, accounting for almost half (47%) of total trips within ROI in the post-pandemic period. A further 37% cite visiting friends and family as the main reason for their visit, with the remaining 16% falling under business or other reasons for travel. However, this does differ slightly across regions as shown in Figure 21 with the increased prevalence of 'other reasons' and the increased travel for business in the Eastern & Midlands region which can likely be attributed to activity in the Dublin city area.

Figure 21: Trips by reason for visit, Irish regions, Q3 2022- Q3 2023



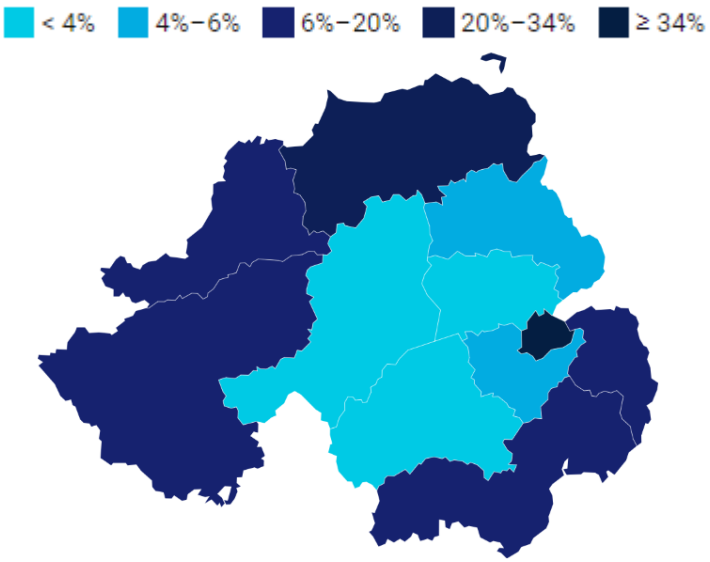
Source: CSO

Day trips by ROI residents also represent a significant strand of the domestic market. During 2022 & 2023 almost 32 million day-trips were undertaken resulting in an estimated spend of €1.6bn. Day trips initially peaked in Q3 2020 at 4.8 million visits after declining slightly in 2018 and 2019. Overall demand reduced in 2021 to approximately 80% of the year previous before surging again in 2022, to peak at 4.9 million trips in Q3 2022. 2023 performance was largely on par with 2022 (97% of 2022) indicating sustained demand within this area.

Since 2016 the number of NI residents choosing to make a trip within NI has been rising. Following the pandemic, the 'staycations' market performed strongly with 2.07million trips recorded in 2022, 92% of pre-pandemic levels (2.26m in 2019). Despite accounting for 37% of all trips made by NI residents in 2022, domestic instate travel only represented 21% of all nights spent. The number of nights per trip averages at approximately 2.2 in 2019 and 2022 period.

Figure 22 shows a concentration of trips in coastal and city areas, which is reflective of visitor intentions outlined further in Figure 23. Belfast and Causeway Coast & Glens received the largest share of visitors with Antrim & Newtownabbey, Armagh, Banbridge & Craigavon and Mid Ulster at the opposite end of the scale drawing in 2-3% share each of total trips.

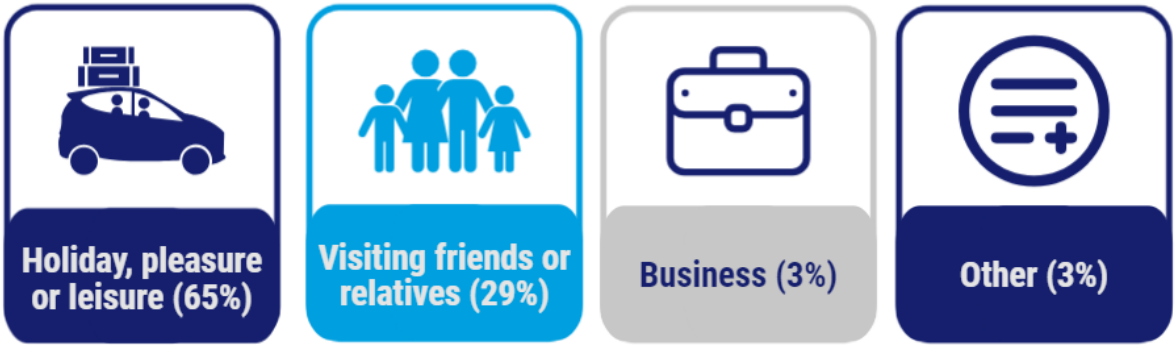
Figure 22: Proportion of trips by NI residents by LGD, 2019



Source: NISRA

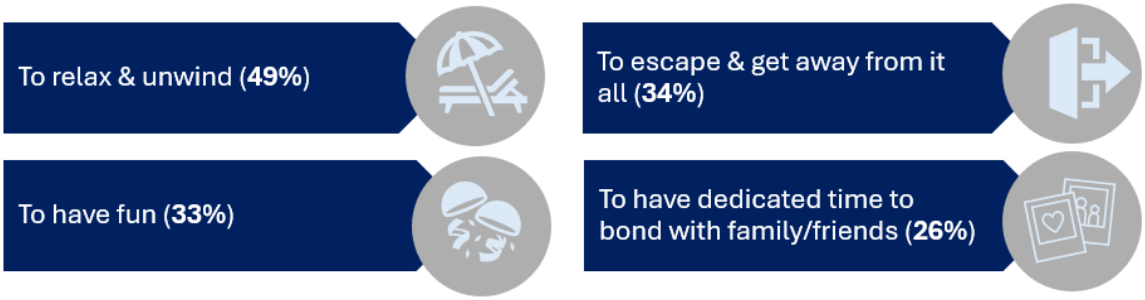
Similar to patterns experienced in ROI, trips for holiday & leisure are the most common reason for travel within NI by NI residents however this has been growing in popularity since 2013 (53%) and now account for 65% of total visits in 2019. Visiting family & friends accounts for approximately a further 30% with "business" and "other reasons" together forming the final 5-6%.

Figure 23: Purpose of trip of NI resident trips within NI, 2019



Source: NISRA

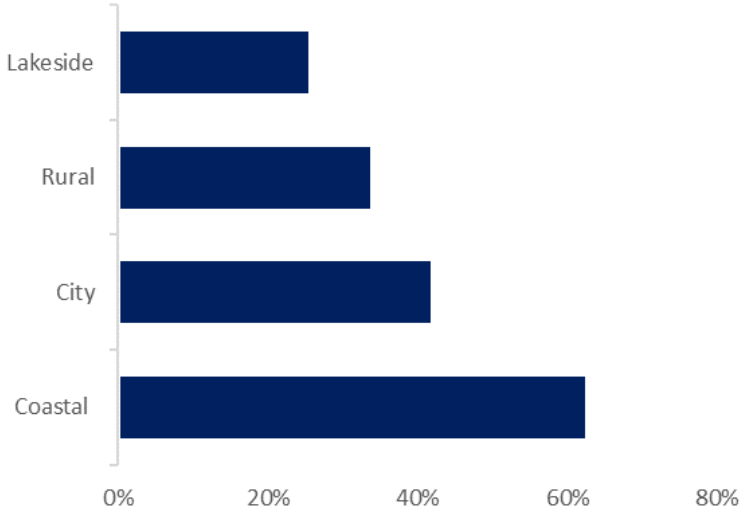
Motivations for staycations within NI are varied with the 4 most prevalent reasons in 2023 listed below. These also change over time. In 2022, trips within NI to 'escape and get away from it all' (39%) and 'to enjoy great food & drink' were more popular (30%) however 2023 has seen an increase of people wanting to enjoy and discover new parts of NI that they haven't visited before (17% in 2022 vs 23% in 2023).



Source: Tourism NI Consumer Sentiment Analysis

Encouragingly, “a strong staycation market” was one of the top reasons cited by NI tourism businesses (22%) to be positive about 2024[28]. When looking at upcoming trips considered by NI residents to other parts of NI, coastal breaks are the most popular. Similar to ROI visitors, the Lakeside the least considered type of trip.

Figure 24: Types of destinations considered for upcoming trips by NI residents to NI, 2023 average



Source: Tourism NI Consumer Sentiment Analysis

Domestic tourism remains a critical area of demand for accommodation and hospitality throughout the year. Around three fifths of all trips taken to or on the island and a third of the nights spent are due to the domestic tourism activity of residents and this does not factor in the day-trip business. From an economic benefit point of view, domestic tourism can be of assistance if lengthening the tourism season beyond the ‘peak’ times and spreading or distributing spending from parts of the island with higher incomes per capita to those with lower.

[28] Tourism NI Industry Survey November 2023 Report

Business activity within the tourism sector



Cliffs of Moher, County Clare

3. Businesses and tourist attractions

Tourism encompasses a broad businesses base, extending beyond accommodation providers. Tourists not only require places to stay but they also seek experiences, transport, activities, meals and souvenirs hence generating activity for non-accommodation providing businesses. The interconnectedness between the two highlights the need for collaboration across sectors to enhance visitor experiences and drive sustainable economic growth into the future. Consultees were particularly keen to emphasise the need for a 'ecosystem' between accommodation providers and wider business, especially in an environment where some types of businesses are struggling more so.

> ***"We cannot sit like an ivory tower with nothing around us. If there are no bars, no pubs, no restaurants and limited visitor attractions we are not going to do well. From an access point of view we [accommodation providers] are the first branch on the tree but from that where do you eat, what do you do, what retail offering is there?"*** *- [C2]*

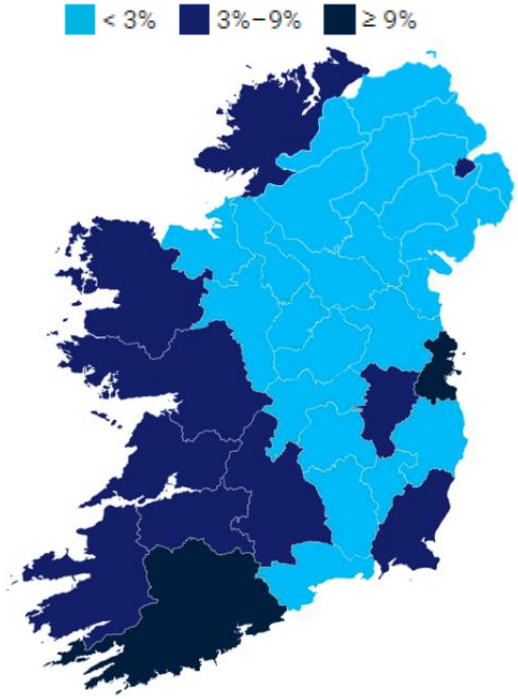
> ***"Covid showed the impact across a wide range of sectors beyond the restaurants to take in tour buses, musicians and museums who all rely on visitors arriving into their community"*** *- [C8]*

This section of the report will cover the different types of businesses operating within the industry and their performance and value, before looking at some sub-sectors and discussing current concerns voiced by key stakeholders within the industry across the island.

3.1 Tourism businesses

Tourism encompasses a wide range of businesses and activities. Focusing firstly on accommodation and food businesses, Figure 25 shows the distribution of businesses across NI and ROI.

Figure 25: Accommodation & food businesses by ROI county and NI LGD, 2021



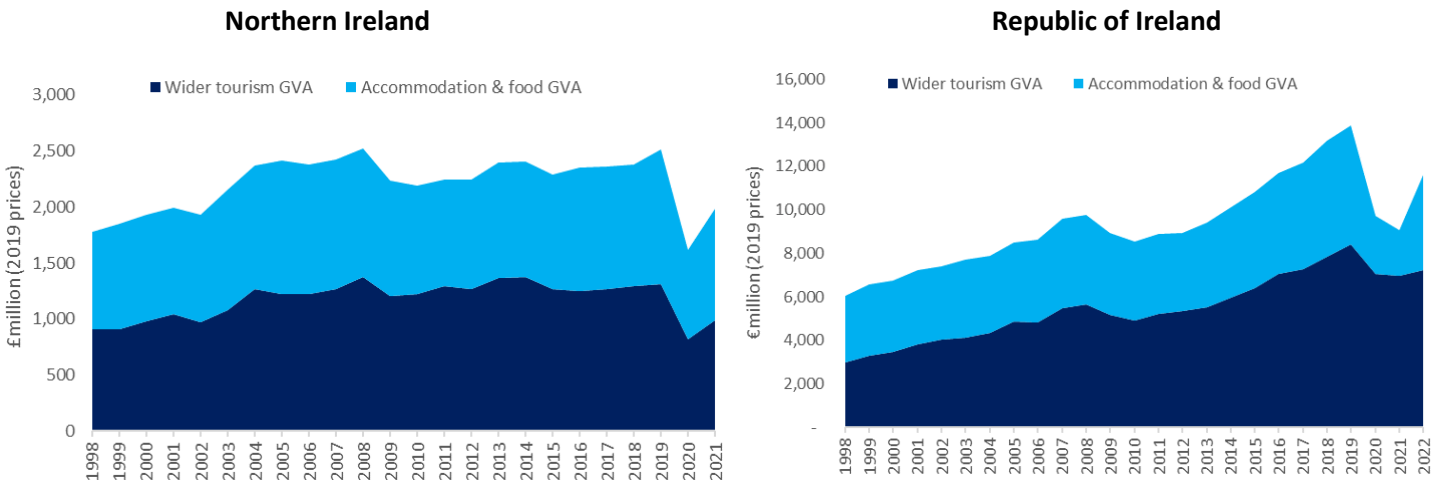
Source: NISRA, IDBR, CSO

In 2023, a total of 4,465 accommodation & food businesses[29] were registered in NI, representing 6% of total businesses in NI. The number of registered businesses in this sector has increased by 25% since 2015, outperforming business growth in the wider economy (16% on average). Food and beverage businesses account for the overwhelming majority (91%), whilst accommodation providers make up the remaining 9%. Using a broader classification of tourism industries, it is estimated that as many as 7,500 businesses in NI in 2023 actively cater to tourists, offering a diverse range of goods, services, and experiences throughout the region.

The latest business demography data point in ROI is 2021, at that time 19,360 businesses were registered within accommodation & food, more than 4.5 times as many as in NI. Whilst Accommodation & Food has a similar (5%) share of all businesses in ROI, growth within the industry has been lower (4%) over the 2015-2021 period. Accommodation accounts for a relatively larger share of businesses in ROI (19%) with food & beverage businesses making up the other 80%. Again, using a wider definition, it can be estimated that as many as 45,300 businesses in 2021 catered to tourists.

The economic contribution of the tourism industry is measured in Gross Value Added (GVA). In a similar approach as above, Figure 26 focuses on the core accommodation & food sector and separately the wider tourism industry. These figures estimate only that proportion of output from businesses that can be consumed by both international and domestic tourists, therefore they do not reflect the total amount of goods and services produced by these firms.

Figure 26: Tourism GVA in Northern Ireland (£million) and Republic of Ireland (€million), 1988-2021/22[30]



Source: Office for National Statistics (ONS), Eurostat, UUEPC analysis

Overall, in 2019 the tourism industry in the Republic of Ireland (€13.8bn) was 4.8 times larger as the industry in Northern Ireland (€2.9bn), a combined value of €16.7bn.

Despite using the same sectoral approach two very different economic landscapes exist in NI and ROI. Pre-pandemic (2019), the core accommodation & food sector accounted for 39% of total tourism output in the ROI whereas in NI it made up almost half (48%) of total output. The pandemic affected the industry in both jurisdictions in different ways. By 2021, accommodation & food GVA in NI had

[29] VAT/PAYE registered businesses

[30] Figures are presented in constant, 2019 prices.

reached 83% of pre-pandemic levels. Whereas, in ROI, accommodation & food in 2021 sat at only 40% of pre-pandemic levels. However, the 2022 data for ROI saw output within accommodation & food climb to 82% of pre-pandemic levels despite additional pressures of approximately 12% of accommodation stock in use under government contracts (more in section 3.4).[31]

A number of other wider trends can also be identified from output data. By 2019, the accommodation & food sector in NI had only surpassed its pre-Global Financial Crisis (GFC) peak by a mere 1% compared to a 32% increase in the Republic. This is reflected in a much stronger annual average growth rate between 2012-2019, known as the recovery period, of 6.1% in ROI compared to 3.0% in NI. However, growth is relative in the context of both economics. Average annual growth of the entire economy in NI was 2.2%, implying accommodation & food outperformed the national average. Whereas in the Republic of Ireland, national growth reached 7.9% per annum, implying the accommodation & food sector lagged national growth.

Figure 27: Summary of the value of the tourism industry in NI & ROI

	NI	ROI	All island
Number of accommodation & food businesses (2021)	4,270	19,630	23,900
Estimation of wider tourism businesses (2021)	7,100	45,300	52,400
Value of accommodation & food sector (GVA, 2019)	£1.2bn/€1.4bn	€5.4bn	€6.8bn
Value of wider tourism sector (GVA, 2019)	£2.5bn/€2.9bn	€13.8bn	€16.7bn
Wider tourism sector as % of total GVA	5.7%	4.3%	

One final point is about the level of business integration across the island. In the 2023 data 15 registered businesses in the Accommodation & Food sector in NI were owned by businesses headquartered in ROI, employing 790 staff. These equate to 1.5% of total employees in the sector and 0.3% of the total businesses, similar to the respective shares for the whole economy but certainly little sign of an integrated sector.[32]

3.2 Visitor attractions

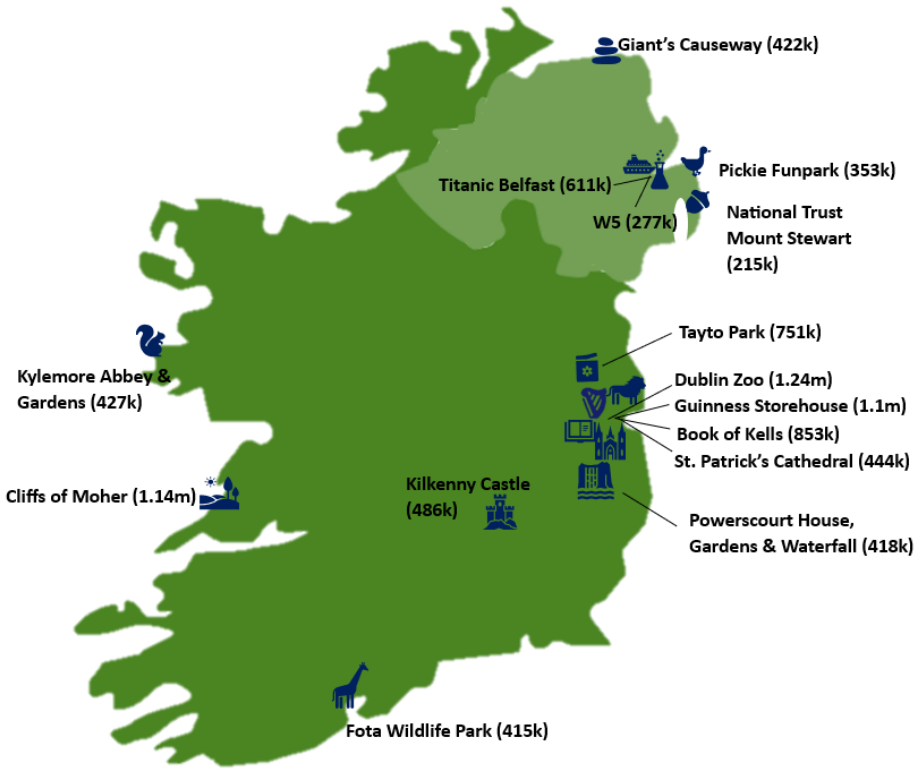
Visitor attractions are essential for tourists, acting as magnets that draw visitors to explore new destinations and enrich their travel experience. They are also valued within the local community as attractions can highlight the cultural and historical identity of a particular place. For young people, they serve as an educational resource offering insights into heritage and traditions, enriching understanding and appreciation of their surroundings.

[31] CBRE - Ireland Rest Estate Market Outlook 2024

[32] Source: NISRA IDBR

Visitor numbers to attractions can be particularly difficult to measure on the island of Ireland as many of them are natural features and spaces where footfall is difficult to capture and many are free at the point of access. For this reason, the following analysis refer to paid visitor attractions in NI and ROI.

Figure 28: Top fee-paying visitor attractions and associated visitor numbers in NI and ROI, 2022



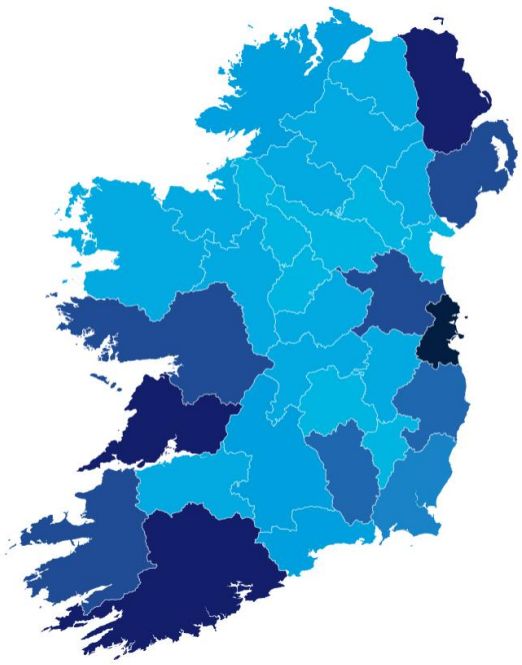
Source: NISRA & Fáilte Ireland

In total, over 21million people visited paid tourist attractions across the island of Ireland in 2022. A sense of the recovery following the pandemic can be seen in positive survey findings from both north and south of the border. In ROI, 84% of attraction businesses reported that business volume in 2023 was either up or on par with activity in 2022 and 61% expect increased visitors in 2024.[33] In NI, 59% of attractions reported their turnover as "way"/above 2022 levels. However, only 28% report turnover as "way"/above 2019 levels with a further 44% indicating that activity was on par with 2019. Again optimistically, 60% of NI businesses expect increased business volume, i.e. a greater number of visitors, in 2024.[34]

[33] Fáilte Ireland Tourism Barometer January 2024. Note this will include unpaid attraction venues.

[34] Tourism NI Industry Survey November 2023 Report. Note this will include unpaid attraction venues.

Figure 29: % of visitors to paid attractions, by county, 2022



County	% of total
Dublin	30%
Clare	8%
Cork	8%
Antrim	7%
Meath	5%

Source: Fáilte Ireland & NISRA

Figure 29 illustrates a sub-regional breakdown of paid visitor attraction numbers in ROI. Whilst there is a distribution of activity between both the east and west coasts, it should be noted that 18 of 32 counties take a 1% or less share of visitor numbers. As the map shows, these counties are mainly in the midlands and border region. In turn, this is a reflection in the regional spread of visitor attractions offered. For example, 11 counties had 5 or less visitor attractions all of which attract 1% or less of total visitor numbers.[35]

> ***"The marketing of the two coasts has been superb and reflects both traditional patterns of visitors but also a mature set of businesses there. Other parts of the country are slowly catching up with this."*** *- [C6]*

Managing regional tourism development involves a comprehensive approach aimed at balancing visitor influx with a sustainable impact on local communities and natural resources. Implementing sustainable tourism strategies and investing in infrastructure is crucial to preventing small towns, particularly those near areas of natural beauty, from becoming overwhelmed by visitors. Managing relations between visitors and locals includes addressing issues like parking congestion and ensuring adequate public service provision to maintain the quality of life for residents. Furthermore, promoting and raising awareness of new and lesser-known attractions in areas with low visitor numbers can help distribute economic benefits more evenly across regions, fostering a balanced in regional economic development and reducing pressure on overcrowded tourist hotspots.

Social media and 'influencer trends' are a new way of spreading information about niche or lesser-known experiences and attractions. For example, Visit Belfast uploaded an 8-part video series on

[35] A number of paid attractions have not re-opened or have not reported their visitor numbers following the Covid-19 pandemic, hence revisions or strong increases may be experienced in 2023.

"Indoor activities" on popular video platform TikTok which has received in excess of 580,000 views across the series to date.

> ***"Social media has played a big role in promoting certain areas and experiences. These campaigns are generally developed on a thematic or geographic basis."*** *– [C1]*

Figure 30: Summary of visitor attraction numbers

	NI	ROI	All island
Number of paid visitor attraction admissions (2022)	3.5m	17.7m	21.2m

3.3 Accommodation stock

Comparable analysis of accommodation stock is focused here on hotels. Although hotels typically make up a small proportion of overall accommodation establishments they offer a much larger proportion of available bedspaces. For example, in 2019 145 registered hotels in NI made up only 3% of total accommodation stock but 37% of overall bedspaces, with an average of 149 bedspaces per establishment (21k in total). Unsurprisingly, the number of hotels registered with Fáilte Ireland in ROI is much greater (823) in 2019 however Hotels in ROI are also typically larger, offering approximately 180 bedspaces per establishment (148k in total).

In the aftermath of the pandemic, accommodation stock in NI has fallen significantly. By 2022 the number of hotels in NI had fallen to 134 resulting in the loss of over 700 bedspaces. [36] In contrast, the number of hotels in ROI had actually risen to 835 in early 2023, providing an additional 9,500 bedspaces. However, these statistics, particularly in ROI, mask a growing proportion of hotel stock being used as accommodation for residents as a result of constrained housing supply.[37] In November 2023, Fáilte Ireland statistics show that approximately 84,400 beds were under government use, rising to 20% of available capacity in three counties (Clare, Mayo and Meath). The effect of similar contracts is less in NI, although the NI Hotels Federation estimated in March 2023 that 8% of hotel bed stock was currently under government use for people in similar circumstances.[38]

Figure 31: "Immediate impacts to the tourism economy" as a result of government accommodation contracts, ROI, 2023



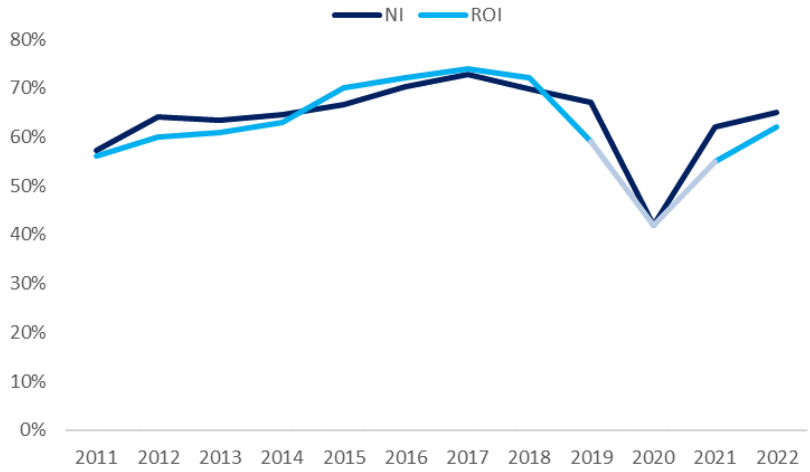
Source: ITIC – Stimulating accommodation capacity in Irish Tourism

[36] Total accommodation numbers are only available from NISRA to 2019.
[37] Stimulating Accommodation capacity in Irish Tourism (2023)
[38] Hotel Market in Northern Ireland (2023)

The Irish Tourism Industry Confederation argue that there are a number of 'immediate impacts' to the tourism economy as a result of increased government accommodation contracts. Fáilte Ireland estimate the economic impact of this to be within €750m-€1.1bn per annum, though this is expected to increase when extended to the potential loss of activity in allied tourism businesses. By way of response, Fáilte Ireland have developed a Business Support Grant for Activities and Attractions. Opening in March 2024, the scheme has been introduced to support Activities and Attraction businesses that experienced an adverse effect in 2023 by the displacement of visitor accommodation stock emerging from the response to the humanitarian emergency induced by the war in Ukraine.[39]

Hotel occupancy in NI & ROI follow a similar path, both peaking in 2017 at 73-74% room occupancy, before falling back slightly in 2018/19 and further again during Covid restrictions in 2020. Consultations from hotels representatives would indicate that occupancy had 'improved' in 2023 however initial monthly data would suggest that occupancy is on a par with 2022.[40] Market intelligence from CBRE Ireland which compares occupancy rates and associated revenue per available room (RevPAR) for major cities across Ireland shows an improved picture in 2023 (see Figure 33).

Figure 32: Hotel room occupancy, NI & ROI, 2011-2022



Source: NISRA & Fáilte Ireland
Note: 2020 and 2021 occupancy rates in NI are based on a reduced number of nights hotels were permitted to open (57% and 61% of the year respectively)
Note: The figures for ROI in 2020 & 2021 are estimates and included here for illustrative purposes. ROI methodology changes in both 2015 & 2019

[39] https://www.failteireland.ie/Identify-Available-Funding/business-impact-grant.aspx
[40] Northern Ireland Hotel Occupancy Survey

Figure 33: Occupancy rates and Revenue Per Available Room (REVPAR)

City	Jan Sept 2022		Jan Oct 2023	
	Occupancy	RevPAR	Occupancy	RevPAR
Dublin	77%	€117	84%	€152
Cork	74%	€107	80%	€124
Galway	76%	€108	-	
Limerick	78%	€82	-	
Belfast	-	-	79%	£84/€94

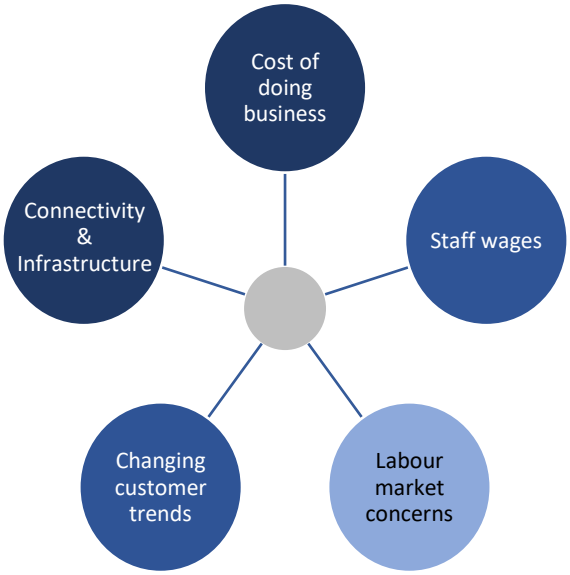
Source: Ireland Hotel Market Update November 2022

Looking to the immediate future, two hotel openings in NI are expected in 2024 which is expected to increase bedrooms to 9,800.[41] The general appetite to invest in hotels across the island is discussed further in the next section.

3.4 Post-pandemic challenges for businesses

During the pandemic, tourism businesses faced unprecedented challenges, with widespread closures, travel restrictions, and plummeting visitor numbers severely impacting their operations and revenue streams. Many struggled to stay afloat amidst uncertainty, implementing safety measures and adapting to changing health regulations. However, as we transition into 2024, while the immediate threat of the pandemic has ended, tourism businesses are now grappling with a new set of challenges and significant fears for the immediate future.[42] Figure 34 offers a summary of issues raised by consultees and stakeholders within their respective industries.

Figure 34: Key challenges in 2023/2024 identified by tourism businesses in NI and ROI



[41] Northern Ireland Hotel Federation.

[42] In the first quarter of 2024 there has been a surge in restaurant and hospitality closures, especially in the Republic of Ireland; see What is behind the recent wave of restaurant closures? (rte.ie) (22 Jan 2024) and Thomas Hubert, 'Closures just one aspect of Irish hospitality's deep restructuring', Closures just one aspect of Irish hospitality's deep restructuring (mailchi.mp) (24 March 2024).

Cost of doing business and competitiveness

The cost of doing business is of paramount concern for tourism businesses going into 2024. Inflationary pressures since 2022 have made financial planning more difficult and unpredictable, even though the recent easing of inflation in recent months may offer greater stability. Businesses have tried to reduce costs where possible, Tourism NI citing a survey that 3 in 10 businesses are reducing energy consumption as a response to rising costs.[43]

> ***"Sustainability practices will in some ways force businesses to be leaner and greener" – [C1]***

Findings from Fáilte Ireland indicate that rising costs were the key concern for over half of tourism businesses (58%) in the ROI going into 2024. Looking at business profitability, across the board profits were generally above (49%) or the same (19%) as 2022, but some areas of the industry were struggling more so. 58% of both activity providers and food & drink businesses reported profitability to be lower than that in 2022. The food & drink businesses also expect a further fall in profits in 2024, indicating difficult conditions for the hospitality sector over the coming year, something consultees reflected on.[44]

> ***"18% of the industry are at risk of failure in the next 12 months. Most of the hospitality industry are incredibly [financially] challenged."*** *– [C3]*

> ***"A number of additional staff costs – the paid sick leave entitlement being one – may push the hospitality end of the industry into very difficult times as record number of closures were seen in the second half of 2023"*** *- [C5]*

With costs rising, squeezed profit margins and other factors such as those discussed below, an approach has been taken of:

> ***"Trade on the days you can make money"*** *– [C3]*

In practice this has resulted in some hospitality businesses in both NI and ROI choosing to reduce their trading hours and/or days. It has been noticed that demand within hotel restaurants has increased, particularly on Mondays and Tuesdays, as a result of a narrower offering elsewhere.

Recent price rises have also necessitated passing some of the burden onto consumers, potentially affecting affordability and competitiveness. However, the evidence that the tourism sector has also raised prices faster in 2023 than in 2022, perhaps doing this in advance of some expected rising costs in 2024.

> ***"There is an underlying thread of anxiety about costs going into 2024 alongside a worry that domestic market won't bear that cost and will think we are price gouging."*** *- [C17]*

> ***"Almost all of the price passed on reflects increased costs to business but it feels like a losing argument with hard-pressed customers"*** *– [C16]*

[43] Tourism NI Industry Survey November 2023 Report.

[44] Fáilte Ireland Tourism Barometer January 2024



Source: ITIC Vision 2030

Despite European (and ROI) inflation falling much sooner than UK inflation, there are still concerns over the prices and the knock-on effects of price competitiveness of the island of Ireland compared to other travel destinations.

> ***"We operate in a high cost economy for businesses – from higher input and labour costs to regulatory compliance costs – and this risks a further loss of competitiveness at a time when consumers are becoming more price and value conscious" - [C12]***

Further, businesses continue to struggle with the weight of business rates and Value Added Tax (VAT), which contribute significantly to overhead costs. The story of changing hospitality VAT rates has been a long one on both sides of the border. In ROI the VAT rate was reduced to 9% in July 2011 to offer support and improve employment among a range of areas, including the Accommodation and Food sector. After significant debate the government planned to increase this to 13.5% from 1st January 2019. However, Brexit and then the pandemic put this change off and indeed the 9% VAT rate was extended to the sectors which were struggling, including the wider accommodation sector. It was first expected to be increased at the end of 2021 but the final change to a 13.5% VAT rate happened only in September 2023. At that time the Irish Business and Employers Confederation (Ibec) called on the Government to maintain the 9% VAT rate 'indefinitely' in order to support the Experience Economy. Businesses believe that the increase in the VAT rate would damage a significant portion of the industry, especially at a time when businesses are struggling with ever-rising costs.[45]

This level of VAT has been eyed enviously in NI where the normal rate of 20% returned in April 2022 after two special Covid-related reductions (to 5% from July 2020 to October 2021 and then 12.5% for a further six months).

> ***"A uniform rate of VAT – perhaps around 12% - would be great to promote the island as a whole to tourists as this tax on turnover is almost always passed on the customers" – [C10]***

Staff wages

Across NI, many businesses economy-wide are preparing for a 9.8% increase to the national minimum wage in April 2024.[46] Many businesses within the tourism sector have also expressed their concerns. Tourism NI found that almost a quarter (24%) of businesses employing staff were anxious about staffing costs in 2023 going into 2024.

[45] Ibec calls for the retention of the 9 % VAT rate - IBEC

[46] For those aged 21+

> ***"There are a lot of other incidental costs including another bump to minimum wage in April. The cost base overall for 2024 is concerning hotels."*** *– [C2]*

In January 2024, the minimum wage in ROI rose by 12.4% to €12.70 per hour. As a result of this minimum wage in Ireland is now the 2nd highest across Europe behind Luxembourg.[47] More than half (51%) of businesses in the ROI reported "rising payroll costs" as a concern for 2024, increasing further to 80% of food & drink businesses consistent with the findings and struggles of the hospitality industry in NI.

Businesses within hospitality have highlighted that the current financial models they have previously worked off are currently unsustainable, with staff costs accounting for approximately 10% more of overall costs than they should do.

> ***"Restaurant wage costs are currently 40%, they should be 30% to run a viable business. We want to pay staff properly but we don't have the headroom to"*** *– [C5]*

> ***"We come back regularly to this issue of low pay in the industry and how increases in the minimum wage are hitting us, but perhaps we need to reflect more on the fact that a clear majority of our staff are paid well above that level and that there is quality work to be had in the sector."*** *– [C4]*

Reliance on the minimum wage and the provision of good quality jobs within the tourism industry is discussed further in the labour market section of the report.

Labour market challenges

Labour market challenges within the hospitality and tourism industry have intensified in recent years driven both by global events and by competition from other sectors of the economy for staff. The sector, especially in NI, began to grapple with skills and labour shortages in the post-crash recovery from 2015 and this was exacerbated by the effects of Brexit following the 2016 referendum result.

> ***"Labour shortages are going to remain a challenge. Brexit did a lot of damage that we haven't been able to reverse."*** *– [C3]*

Further to this, the Covid-19 pandemic was a significant shock leading to widespread disruptions to staff in the industry and this complicated recruitment efforts during the pandemic recovery period. Consultees were keen to highlight the extensive efforts that had been made, before the pandemic, to overhaul the industry's image and perceptions. This included improving working conditions, making working hours more manageable and flexible where possible, paying the living wage (in NI) and encouraging career progression and the changing perception of the industry as a long-term career. However, the pandemic put much of the image into a negative spotlight.

The industry response to Covid came to depend on what options were available to employers who had to close accommodation, bars and restaurants to customers. In March 2020, ROI saw a record 36,000 people join the Live Register, many from the tourism sector, and by the end of April 127,000 people from Accommodation and Food Sector businesses were in receipt of Pandemic Unemployment Payment and a further 44,000 receiving the Temporary Wage Subsidy Scheme. In NI the furlough or

[47] Source: Eurostat

Coronavirus Jobs Retention Scheme was supporting 41,500 workers from the sector by June 2020. Effectively by that summer close to 90% of the employees in the Accommodation and Food sector were in receipt of state support towards their wages or incomes.

> ***"During Covid the industry was very exposed and the image suffered. We were one of the first industries to make the redundancies, there was a lack of job loyalty and security. We didn't make it a very glamorous job role so I think one of our biggest challenges now is moving away from that perception. We had done so much work with a number of the federations and had got to the stage where it was a recognised profession, not just a stop gap or a job while you're studying, it was a career."*** *– [C3b]*

> ***"The early wave of redundancies even before government mandates and certainly before the Pandemic Unemployment Payment or furloughs became available meant long-standing staff left and were never coming back"*** *– [C5]*

There is recognition by some businesses that in a tight labour market where other sectors are offering competitive wages and working conditions that the tourism sector and especially food and drink businesses have to change in order to continue to recruit staff and retain them.

> ***"The labour market is so tight, you can't get someone if you're not offering a better quality job than they can get elsewhere"*** *– [C5]*

> ***"Staff don't just leave workplaces, staff leave bad management. Old school management is holding the industry back and it will take another ten years for it to fully pull through into modern, competitive practices"*** *- [C3b]*

Businesses and government have both talked about the development of standards of excellence that could be adopted, by businesses, which would cover elements such as treatment of employees. Elevating standards of excellence in employee management has the potential to enhance a business's reputation and attract talent to the industry by demonstrating commitment to employee well-being, professional development and creating a positive work environment.

> ***"It's not just about changing perceptions but also changing realities"*** *– [C1]*

A number of consultees reported that the numbers applying for vacant roles in the tourism industry have increased in 2023 and the quality of applicants is also better. Improving industry standards is important in building the reputation of the industry as a place to work over time.

Since the early 2000s the tourism sector alongside other industries have turned to immigration as a source of labour. By 2019 foreign nationals made up 45% of the Accommodation and food service workforce in the ROI and consultees estimated as many as a third in parts of the hospitality sector in NI. Businesses also identified that a lot could be learnt from foreign nationals within the industry, ideas, approaches and creativity, but foreign language skills was the key advantage listed that someone from abroad could bring to the island of Ireland.

The availability of this source of labour has certainly come into question, particularly for the NI sector. The post-Brexit talk of changes followed by increased visa requirements that are less favourable to tourism and hospitality workers have made this method of filling vacancies much more difficult.

> ***"[Labour] shortages won't change until immigration changes. We have some proposals on the table, simple stuff like youth visas for people under 30 within the commonwealth where they could come in and work for 2 years."*** *– [C3]*

> ***"I don't think we [hotels] will get a dispensation or special status for bringing migrants in but we need it."*** *- [C2]*

Collectively these factors contribute to a challenging environment for businesses to attract and retaining skilled workers. This requires innovative solutions and a proactive approach in order to address labour market pressures and protect the viability of long-term business growth within the sector.

Changing customer trends

Within the hospitality sector, shifts in customer trends are notably reshaping the landscape. There has been a paradox of an uptick in the demand for luxury offerings and products during a pervasive cost of living crisis which has notably squeezed disposable incomes. However, both can be true when these behavioural habits are explored further.

Consultees pointed to higher end, more luxury products facing increased demand:

> ***"When they [customers] go out they're spending more, but they're going out less. When they go out they're going premium product, experiences that they can't get at home. Draft beer, cocktails, nice food, it needs to provide an experience."*** *– [C3]*

> ***"The improvement in offerings and quality of what you can purchase to eat at home means that the industry has to work harder to get customers to come out and spend. The mid-market part of the industry is probably feeling this most"*** *- [C16]*

The general consensus from the hospitality industry is that patterns of demand have also changed:

> ***"The trend has moved to event led [demand] whether that's a sporting event or a family birthday. The problem is that if that falls on a Thursday it's hard to predict, they then don't go out at the weekend and it could then be dead on a Saturday, it's harder to manage staffing needs."*** *– [C3]*

A shift towards event and occasion-led demand may be a sign of individuals become more discerning with their spending habits. Value for money also becomes increasingly more important to consumers during times when disposable income is squeezed. Customer service and providing that experience, especially at the higher end becomes increasingly more important.

Another trend noticed particularly by pubs, bars and nightclubs is the reduced consumption of alcohol amidst the growing societal trend of health consciousness. In Northern Ireland, bars & pubs lobbied extensively to have licensing hours extended to 3am but they now report that very few establishments make use of it.

> ***"With the exception of those on a hen or stag do, tourists are less interested in drinking and late night activities. Tourism spend was more concentrated within food and the one pint of Guinness. Residents make up the base of the evening economy. In Belfast although the Cathedral quarter is branded as a tourist hub, 75% of trade at night time is domestic. Tourists are generally in bed to go to an attraction the next day"*** *– [C3]*

> ***"Our business is very much organised around the early evening entertainment as the tour groups roll on the next day or the business/conference delegates have their work to do"*** *- [C7]*

Pubs and bars also report that consumption of alcohol amongst residents has declined, particularly within a younger, student cohort. With decreased financial margins and changing societal trends, pubs and bars may have to think how they position themselves in the market to remain competitive and attractive to tourists and multi-generational domestic clients.

Infrastructure & connectivity

Infrastructure and connectivity play pivotal roles in shaping the accessibility of the tourism industry, yet they often present significant challenges. The capacity for accommodation, including hotels and short-term rentals, is a critical aspect affecting visitor experiences and satisfaction.

It is estimated that by 2032, the ROI market will require an additional 11,500 bedrooms to accommodate projected industry demand from tourists. However, outside of key cities such as Dublin and Cork, there is "little appetite for new hotel construction". Some industry sources and consultees have suggested merit in the introduction of government policy to stimulate supply of accommodation, including tax breaks for building in regions which show an undersupply of accommodation, changes to planning and regulation and public-private partnerships with local authorities.[48]

> ***"Our plans would be to concentrate on the two main urban hubs but this has become very difficult to get through planning – we believe Dublin alone could do with another 7,000 bedspaces but this is not a popular view"*** *– [C11]*

This hesitation about construction is echoed by consultees in NI, although the need for accommodation stock appears less severe in the short term.

> ***"There are approximately 70 ongoing projects in the pipeline but they are dependent on fiscal policy, capital support and City Deal investments. Some may be pushed out to 2025 as people are waiting on both labour and finance to build it. Lead time and costs have recently been unpredictable."*** *– [C2]*

Capacity within air and seaports is essential for facilitating access to the island. The fact that almost 90% of international visitors come by air means that airport connectivity is to the fore. Widening connectivity in airports in NI, namely to wider Europe, is key to facilitating and encouraging visitors to come. The NI Route Development Scheme, operated by the Executive, aims to secure new direct routes from further afield (Europe, North America and the Middle East) into NI.

[48] Stimulating Accommodation capacity in Irish Tourism (2023).

> ***"Someone from New York here for 1-2 weeks might come to Northern Ireland for the weekend. Someone from Barcelona who is flying into Dublin and is only here for 2-3 nights is unlikely to make the journey up the road."*** *– [C2]*

A different kind of connectivity issue exists in the Republic of Ireland, at least for Dublin Airport. The regional airports, by Q3 2023 data, were back to 2019 levels but all are keen to develop new routes and build further volumes. Dublin Airport is in a different place, where the 32 million passenger cap is in danger of being breached and there are newspaper reports of plans for new routes being postponed. Debate over how the DAA might manage the talked-of 40 million passengers limit (by arrival/departure times, terminals, noise and emissions) is now in the planning arena.

> ***"We will be turning business and employment away if the passenger cap is not amended. Tourists will be going somewhere else and our intelligence tells us this is mainland Europe or Britain, not other airports on the island"*** *– [C14]*

> ***"For us the issue is not about the absolute number of passengers but how this is managed with regard to emissions commitments and the noise impacts on local residents."*** *– [C9]*

Robust public transport networks are vital for enabling tourists to explore and encouraging balanced regional growth. In the first instance, a lack of public infrastructure facilitating passengers to and from major airports into city centres has been highlighted as a major challenge. In Dublin, the construction of a metro link from the north of the city to the centre, which will pass through the airport, is due to start in 2025, though questions remain whether bus or rail provides a better form of public transport more generally.

At the same time public transport providers in NI, Translink, are exploring a train link to Belfast International Airport[49] to improve connectivity. A feasibility study is currently underway regarding the re-opening of the Knockmore line which was closed back in 2003. Figure 35 depicts the 'Circle Line' which incorporates the possibility of a more connected Northern Ireland. During an all-island rail network debate at Stormont[50], councillors emphasised that "a rail connection at Belfast International Airport is vital for the connectivity of the business community, and for tourism". It was also mentioned that given capacity constraints in Dublin airport, "there is also an opportunity for both Belfast airports to capture the significant growth in numbers and to realign passenger numbers across the island". A prospect that is supported by Tourism NI if the necessary infrastructure was in place.

[49] Translink exploring train link with Belfast International Airport, Belfast Telegraph (2023). Available at: https://www.belfasttelegraph.co.uk/news/northern-ireland/translink-exploring-train-link-with-belfast-international-airport/51658466.html

[50] All-island Rail Network. Private Members' Business – in the Northern Ireland Assembly (February 2024). Available at: https://www.theyworkforyou.com/ni/?id=2024-02-27.3.1

Figure 35: Depiction of potential Circle Line Rail Transport across Northern Ireland



Source: Belfast Live

Other connectivity challenges exist across the island. Many rural parts are inaccessible by public transport thereby limiting tourist numbers unless they have private transport.

> ***"Connectivity problems exist not only in getting people to Belfast or NI but getting them around when they get here. Mid Ulster for example has a relatively low tourism offering due to lack of investment and infrastructure for tourists."*** *– [C1]*

Both public and private investment are crucial for providing and enhancing the overall tourism experience, driving economic growth, and promoting destination competitiveness on a global scale. Addressing these infrastructure and connectivity issues requires collaborative efforts among government and wider stakeholders to create inclusive tourism destinations.

The labour market



Downpatrick Head,
County Mayo

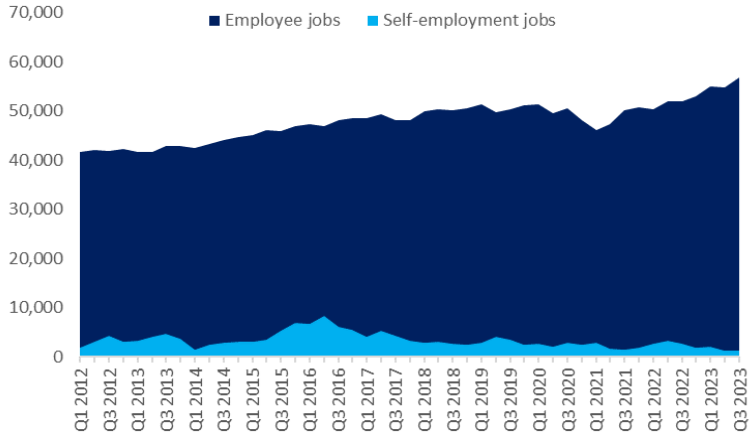
4. The labour market

The labour market within the tourism industry is characterised by its heavily customer-facing nature and the diversity of employment opportunities on offer, ranging from entry-level positions to managerial and professional roles. However, challenges such as Brexit and the Covid-19 pandemic have resulted in recruitment and retention challenges across all skill levels, as previously outlined. Despite these challenges, efforts to inform young people about tourism and hospitality as a viable career path are crucial for developing interest and attracting talent to sustain the industry's growth and competitiveness. Evolving industry standards and changing consumer preferences increasingly necessitate ongoing training and upskilling initiatives to ensure a skilled workforce and growth of the tourism industry in the future.

4.1 Baselining employment levels and conditions within the industry

The analysis of employment in the tourism industry follows the approach used elsewhere in the report, covering both the core accommodation & food sector and the wider tourism industry. The figures below refer to jobs, hence it is possible for one person to have more than one job and jobs may not necessarily be full-time positions. In NI, for example, the accommodation & food sector has the highest prevalence of part-time work (61% of jobs), almost double the average across all sectors in the economy (33%).[51]

Figure 36: Workforce jobs in accommodation & food, NI, Q1 2012 – Q3 2023



Source: NOMIS

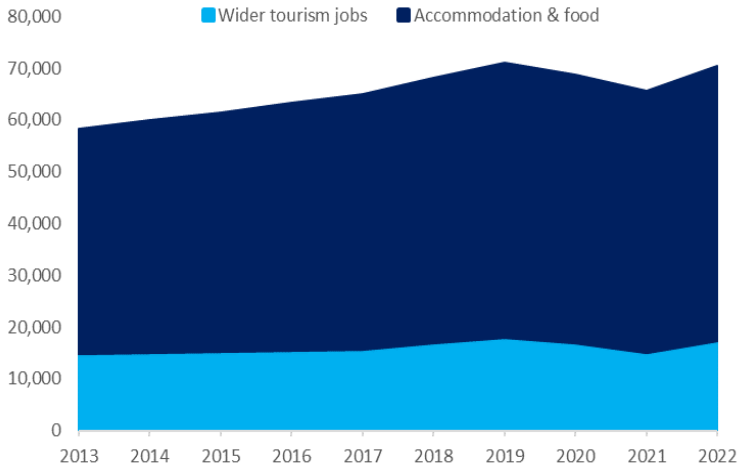
Despite a number of fluctuations, overall growth within the accommodation & food sector has been on an upward trajectory since the beginning of 2012 as shown in Figure 36. Job growth in NI in the 2012-2019 period averaged at 3% annually before dipping at the onset of the pandemic. The government-supported furlough scheme heavily mitigated economy-wide job losses, limiting these to approximately 5,000 or almost 10% of the sector between Q1 2020 and the trough in Q1 2021. Since then, growth has been strong within the sector (5% Q2 22 -Q2 23), surpassing pre-pandemic jobs levels in mid-2022 before continuing to climb with a record level of 57,900 jobs recorded within the sector in Q3 2023. Figure 35 also shows that employee jobs account for the majority of roles available (97%) with self-employed roles making up the remaining 3%, which translates to approximately 1,500 jobs in

[51] Source: BRES 2022

2023 (YTD). In ROI, self-employed roles account for a larger (6%) and more stable share than in NI but remain a small proportion of the overall landscape[52].

Wider tourism employment encompasses jobs in other sectors including transport services, travel agencies and cultural, sporting and recreational activities illustrated in both Figures 37 and 38. The wider tourism industry is slightly larger in NI accounting for approximately 25% of tourism jobs in NI compared to 20% in ROI. Similar to the trends shown earlier, tourism employment in NI rose steadily in the years leading up to the pandemic supporting approximately 70,800 jobs. Estimates for ROI are largely based on the frontier series available from CSO which is available from 2019 onwards with Figure 38 showing a pre-pandemic peak of 240,000 jobs.

Figure 37: Employee jobs in tourism, NI, 2013 – 2022



Source: NISRA, BRES, UUEPC analysis

The most notable difference between NI and ROI is the extent to which job losses occurred during the pandemic. Between 2019 and 2021 overall tourism jobs declined by 8% in NI, however across the border a 28% decrease in tourism jobs was experienced between 2019-2020. Pointing to the employment effects of the pandemic within the accommodation & food sector being much more severe in ROI than NI.

In light of this, the recovery in ROI has been impressively strong, surpassing pre-pandemic levels in 2022 (annual average of 245,200 jobs) and further still in 2023 (256,600 jobs in Q2 23). In Northern Ireland, despite a shallower impact, the recovery has been slower with employment levels almost reaching those of 2019 in 2022 (70,200 jobs) but not posting the same record numbers as in ROI.

[52] Source: Eurostat

Figure 38: Employee jobs in tourism, ROI, Q1 2019 – Q3 2023

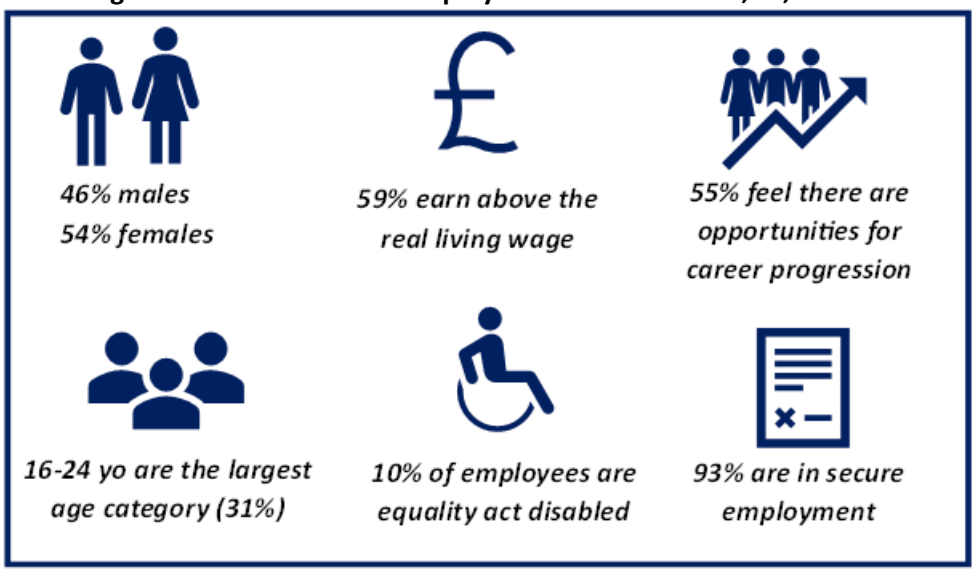


Source: CSO frontier series, UUEPC analysis

Figure 39 provides further demographic and work quality insights regarding employees working in tourism roles in NI in 2022. The tourism industry has a disproportionately higher rate of females and younger people working in it compared to other sectors of the economy. The proportion of employees earning above the real living wage is in tourism (59%) is significantly lower than the NI average (86%), reflecting on the low pay picture identified earlier by consultees. However, progression in this area has been made with an increase from 34.5% earning above the living wage in 2020/21.

The reliance of the tourism industry on minimum wage employees and a smaller number of young people paid less than this is clear. Recent research found that 27% of all ROI employees in accommodation & food were paid at or below the minimum wage, accounting for approximately 30% of all staff in the ROI paid at or below that level[53].

Figure 39: Tourism sector employment characteristics, NI, 2022



Source: NISRA

[53] Fáilte Ireland - Cumulative Impact of Changes to Payroll Costs on Business Operations. The minimum wage in the Republic of Ireland and the real living wage in NI are different proportions of average wages in the economy, the NI one being much higher (around 80% of the median wage compared to a target of 60% in the Republic).

Opportunities for career progression are slightly lower than the NI average (58% vs 55%), but again increasing from 2020/21 (40%) significantly higher than the 38% reported in ROI by Fáilte Ireland. Despite this, 88% of ROI employees see themselves "having a long-term career in tourism & hospitality".[54]

Looking to the future, from a policy perspective maintaining momentum within this area will be of increased importance as we look, as a society to provide people with good quality work. Over the coming years, the emphasis is likely to be as much about creating good quality jobs as job creation alone. This will raise questions over working conditions for employees, the provision of better job security in relation to contracts, hours worked and compensation. Work quality also raises questions around job flexibility, acknowledgement of holiday entitlements, wellbeing and sickness, and ensuring safe working conditions.

Figure 40: Summary of labour market statistics

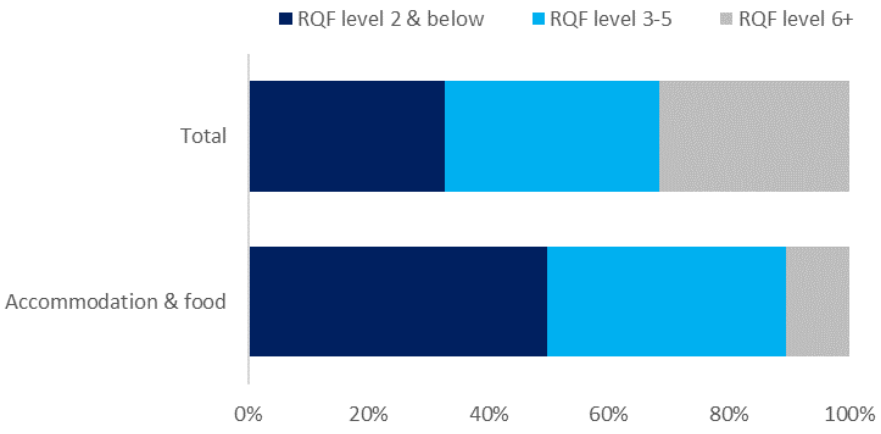
	NI	ROI	All island
Number of accommodation & food jobs (2022)	52,700	198,800	251,500
Number of wider tourism jobs (2022)	70,200	245,200	315,400
% of wider tourism jobs compared to 2019	99%	106%	105%

4.2 Career perceptions within the industry

The provision of formal education, upskilling courses and professional development within the tourism industry are vast and continually evolving as industry standards progress with institutions across the island providing courses to educate, train and upskill people in the sphere of tourism.

Figure 41 provides a qualification profile of those employed within the accommodation and food sector compared to the economy-wide average in Northern Ireland to provide wider context of the matter.

Figure 41: Qualification profile, accommodation & food vs national average, NI, Q2 22- Q2 23 average



Source: ONS, LFS, UUEPC analysis

[54] Tourism Careers Research 2023 Update

At the upper end of the skills spectrum, RQF level 6+, degree qualifications are both sought after and taught across the island of Ireland. However, Travel, Tourism and Leisure enrolment numbers in Irish universities has been slowly falling since 2017/18 having decreased by 28% between 2016/17 and the last academic year (2022/23)[55].

There are some key players in the provision of degree level and above qualifications for the tourism sector including Shannon college of Hotel Management at the University of Galway, a renowned institution and Ireland's only dedicated Hotel Management college. They provide a variety of Level 8 Business degrees and postgraduate courses alongside PG certs and PHD Scholarships. Practical training, through work placement, is a large part of the college's ethos as they look to equip students with the skill set and attitude to competently enter into a career within the world of hospitality.

Ulster University provides several undergraduate and postgraduate courses within the Department of Hospitality Tourism and Events Management. They operate numerous labs and courses that support multiple service industries both at the Belfast and Coleraine campuses. The University also works alongside industry to design and deliver professional development and accreditation courses. Through mandatory placements and an in-house functioning restaurant, "Academy Restaurant", or FACTS at Coleraine, Ulster University develops students for the Hospitality, Tourism, Food and Events sectors. "A large proportion of key leaders in NI are Ulster University graduates and Ulster's graduates are ready for management and leadership level positions which are particularly in demand post-Brexit [56]."

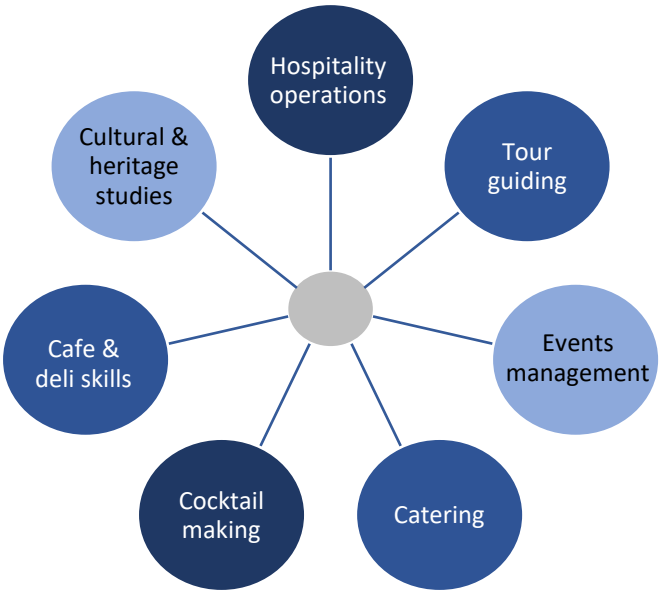
> ***"The last few years have been very challenging for the sector, with the pandemic, tighter immigration rules and rising costs. Collectively, this has placed enormous pressure on Tourism Hospitality, Events and our Food businesses. We are supporting the industry through these challenges by developing future leaders, delivering short courses and conducting impactful research in our labs at both our Belfast and Coleraine campuses. In addition, establishing ourselves as a benchmark for best practice in the industry by providing good quality jobs is also extremely important to us."*** *– [C3a]*

Education providers working with industry is key to providing professional recognition, expanding opportunities and retaining staff. Fáilte Ireland reported in 2023 that 53% of employers invested in upskilling and training in an effort to retain staff[57].

Further Education (FE) institutes across the island of Ireland provide a range of courses relevant to those wishing to enter the tourism and hospitality sector. Courses are available at a range of qualification levels suitable for school leavers, apprentices and those wishing to obtain foundation degrees. Of those who have studied leisure, travel and tourism subjects in NI, 82% of leavers were either in employment (52%) or further study (32%) in 2021/22[58]. Figure 42 shows the diversity of courses offered within FE, readying students for the world of work.

[55] https://hea.ie/statistics/data-for-download-and-visualisations/key-facts-figures/
[56] Ulster University representative
[57] Tourism Careers Research 2023 Update
[58] DfE FE Outcomes - 2021-22

Figure 42: Examples of FE courses available in NI and ROI



Source: Belfast Met, Northern Regional College, Courses.ie

Post-primary institutions are also important vehicles for promoting careers in the tourism industry and providing young people with courses in these fields can strengthen the future workforce within tourism. At school level the number of education institutions providing a Hotel Catering and Tourism course for Leaving cert programme has increased from 188 in 2010/11 to 269 in 2022/23[59]. Industry leaders have realised the value of promoting the industry to young people in the way that other subject areas with shortages in the labour market have been in the past and continue to do so.

> ***"We're working more closely with schools to promote tourism & hospitality as a career opportunity for students aged 14-16 but we're late to the game with this approach."*** *– [C3b]*

4.3 Tourism as a gateway industry into employment

WorldSkills is an organisation that aims to promote education and training across a wide range of sectors. In 2023, they welcomed 28,000 students from schools across Ireland in a partnership between Government, Education and Industry to promote work experience and apprenticeship programmes across a wide range of industries, including hospitality and tourism.

As shown by Figure 40, hospitality and tourism is one industry that provides a sizeable number of jobs that are accessible for those with low levels of qualifications. Therefore, it is a target industry when consider re-engaging the economically inactive[60] population. For example, in Northern Ireland, the Department for the Economy's (DfE) SKILL UP initiative in partnership with NI's Further and Higher Education institutions is a flexible skills programme aimed at adults who are looking to re-train and re-skill in order to help those who are inactive (re)integrate into the labour market. Tourism is one of the industries represented within this programme, which provides free accredited courses such as Tour Guiding Travel 2 and Tourism Programme – L3 Award in Principles of Customer Service in Hospitality, Leisure, Travel and Tourism which are delivered at a number of Further Education campuses across NI.

[59] CSO

[60] Someone who is economically inactive is currently not work and not seeking work. This can be due to a variety of reasons.

Final conclusions and considerations



Templepatrick, County Antrim

5. Final conclusions and considerations

In conclusion, the tourism sector across the island of Ireland emerges as a buoyant and resilient industry. The comparable data for Northern Ireland and the Republic of Ireland to 2019 demonstrates strong growth and successive record visitor numbers from 2013 onwards. The available indicators for 2022 and consultations showcase an ability to bounce back from the very significant challenges that the global pandemic posed for the tourism industry. In sum, it provides almost €17 billion in GVA and supports over 300,000 jobs across the island.

In discussing the relative size, strengths and challenges facing both the Republic of Ireland and Northern Ireland, opportunities and obstacles are both revealed. The all-island inter-dependence of the sector (especially when thinking about access or promotion abroad) mean that certain challenges and issues transcend borders, many of these long-term considerations for the industry that may be of interest to policy makers and influential stakeholders.

It was noted that cooperation on a cross-border basis on tourism had a long history from the early 1960s before the decision was taken in 2000 to establish Tourism Ireland as one of the all-island implementation bodies. Building upon a collaborative cross-border approach to the challenges facing the tourism industry seems to hold obvious potential to further unlock the full potential of an all-island economy, while in turn ensuring the continued prosperity of the tourism sector for years to come.

This report compares the relative performance of the tourism industries north and south, their shared and differing characteristics, and their contribution to the economy. It concludes by discussing how the well-documented gap in tourism numbers and earnings between Northern Ireland and the Republic might be closed with appropriate policies and strategy. Finally, the report is a contribution of relevant North-South comparisons to better understand all-island tourism and the cross-border cooperation to date within the sector. As such, this report could provide context to the on-going economic debate on Irish Unity.

North-South Comparisons

While the scale of the tourism industry has grown North and South, Northern Ireland's share of international visitors to the island has remained static over recent decades, perhaps reflecting the legacy of conflict in the perception of visitors. Dublin Airport is the dominant entry point for international visitors to the island, but nonetheless visitors overwhelmingly also travel to another part of the island. In 2019, 30% of visitors travelled to Ireland's South West and 26% went to the West. By contrast only 15% visited Northern Ireland.

The data points to a strong recent performance by the tourism industry in Northern Ireland, but there are a range of performance gaps, leading to lower economic impact. Visitors to Northern Ireland are more likely to be visiting friends or relatives rather than on holiday or a business trip, and of those visiting friends and relations almost half will stay with them, considerably reducing the earned income from accommodation. Visitors from GB are crucial to both parts of the island, but the scale is different, they make up two thirds of visitors to NI compared to one third in the Republic. People also stay in NI for fewer nights, and this is particularly so for long-haul visitors. Taking these factors together, the Republic of Ireland had approximately 4.3 times as many trips by international visitors compared to Northern Ireland in 2019, but 7.6 times as much expenditure totalling a respective €4,874m in the South and €672m in the North. If we look at Gross Value Added generated by the entire tourism industry, including on-island tourism, in 2019 the tourism industry in the Republic of Ireland (€13.8bn) was 4.8 times larger than the industry in Northern Ireland (€2.9bn).

The scale of domestic tourism trips within NI, at roughly two million per annum, remained static in the decade from 2011, whereas in the Republic, the scale of within-state tourism increased from 6.5m to 11m trips in the same period, probably reflecting the much stronger economic performance, since the low point of the post-GFC crash, and higher disposable incomes. While 'domestic' tourism does not bring additional income to the island, it does play an important part in regional spread of economic activity, and this is a crucial factor for potential growth in the NI economy.

Notwithstanding, some public commentary that many people from the South never travel to NI, the number of trips by residents of the Republic to NI has increased dramatically over the past decade. In 2013 less than 100,000 cross-border trips were made compared to over 300,000 in 2023. Following the pandemic over 200,000 trips per quarter have been recorded. While there has been a decline in the numbers of people from NI coming south for tourism, it remains proportionately much higher than in the other direction. In 2019, such before the pandemic it was 1.7m trips and in 2022 it has already recovered to 1.4m – this accounted for a quarter of all trips made by NI citizens in both years.

The tourism sectors North and South have many shared challenges as regards wage levels and labour supply. In the Republic 27% of all employees in accommodation and food sectors were paid at or below the minimum wage. In Northern Ireland 41% were paid at or below the real living wage (and that was an improvement on previous studies). In both cases this is well above the average for the labour markets as a whole. The labour market context is not all negative in the wider sector, with a majority in NI and just over one third in the Republic seeing opportunities for career progression. The availability of migrant labour is now more limited, particularly for the NI sector, creating constraints on growth. The post-Brexit talk of changes followed by increased visa requirements that are less favourable to tourism and hospitality workers have made this method of filling vacancies much more difficult. In a context where unemployment levels are very low, more focus needs to be placed by the industry on creating higher quality jobs, rather than simply job creation, in order to activate those further from the labour market into the sector.

Policy Responses – short term

The findings of earlier research in 2006 that cross-border cooperation in tourism lacked depth or strategic intent does not appear from the stakeholder consultations to have fundamentally changed. For example, despite the much more developed tourism industry in the South, only 0.3% of NI registered businesses in the accommodation and food sector, were head-quartered in the Republic. Perhaps a refreshed agenda for North/South tourism cooperation might explore some of the following all-island challenges .

Infrastructure & connectivity

Infrastructure and connectivity are pivotal aspects of the tourism industry in both parts of the island, influencing the capacity and travel options available to visiting tourists and the potential for growth in the future. A robust infrastructure spanning roads, airports, ports, and public transportation networks, enhances accessibility and convenience for travellers, allowing them to explore more of the island with ease. Diverse travel options such as train routes, ferry crossings and public transport services enrich tourists' journeys enabling them to efficiently discover Ireland's diverse landscapes, cultural heritage and attractions. Hence, a programme of investment in infrastructure and connectivity not only supports tourism growth but also ensures that visitors can more fully explore the island when they get here.

Connectivity is also a question of influencing visitors' perceptions of visiting the whole island. While every region, including NI, will have a local interest in selling itself, the political reluctance to market NI as part of the island of Ireland 'experience' has had a negative economic impact given the much higher visitor numbers in the South. Practical measures such as the extension of the hugely successful

Wild Atlantic Way to Derry City, and *Ireland's Ancient East* marketing to NI, could play an important role in increasing the share of visitors arriving through Dublin who travel to NI.

Private sector investment

Private sector investment in tourism infrastructure can range from the provision of accommodation to visitor attractions and it holds immense potential for driving growth and enhancing the visitor experience. With the tourism industry continuously evolving and expanding, there is a pressing need for modern, innovative offerings to meet the demands of visitors.

Private sector investment can typically be seen in the form of accommodation, restaurants, bars and retail opportunities. However, privately owned visitor attractions in ROI, such as the Guinness Storehouse and Emerald Park (formerly Tayto Park), have also shown success in recent years. Public funding has and does play its part in supporting this investment through leveraging private sector resources and entrepreneurship, both NI and ROI could continue to unlock new opportunities and develop the ecosystem between accommodation & hospitality offerings and attractions and experiences. Issues such as planning and access to finance are often cited as concerns to be addressed. In turn, the economic benefits include job creation, tourism growth and ultimately ensuring long-term prosperity for both investors and local communities.

Improving regional development

Although the tourism industry is ubiquitous across the island of Ireland its development continues to be uneven across different regions. Developing, and strategically promoting, lesser known regions to domestic and international tourists alike, distributes economic benefits more evenly but also enriches the overall tourism offering with a larger array of attractions and authentic experiences. Encouraging visitors to venture beyond hotspots not only alleviates pressure on crowded attractions but also promotes regional and sustainable development.

Enhancing regional development also presents an opportunity to increase relative visits to Northern Ireland. Encouraging tourists to include the region in their travel itineraries has the potential to not only boost economic development and strengthen cross-border cooperation whilst continuing to showcase the island of Ireland as a worldclass tourist destination.

Targeted regional investment is a more appropriate policy instrument that the sector-wide reduction of VAT to 9%, which was introduced in the Republic, but recently reversed, amid widespread allegations that the cost reductions were not reflected in pricing, and that it mainly benefited larger operators in the cities who were in any case close to capacity. Regional investment, including potential rates relief for small businesses, complementing small town renewal initiatives, could in contrast be more strategically deployed.

One potential barrier to continued regional and cross-border development is the introduction of Electronic Travel Authorisation (ETA) for visitors who are non-GB or ROI nationals wishing to visit NI[61]. At time of writing, visitors will need to apply for an ETA before booking their travel and once approved is valid for 2 years[62]. There are however questions over how this will be enforced or monitored with no immigration controls on the NI-ROI border, leading to many consultees disregarding this as a major

[61] People who legally reside in ROI are also exempt

[62] For more information on ETA's see: https://www.adviceni.net/eu-settlement-scheme/electronic-travel-authorisation-eta

issue for concern. There are calls from wider groups, namely NI Tourism Alliance, for a 5-7 day exemption for tourists travelling to NI through the ROI[63].

Sustainability

The growing importance of environmental sustainability in the tourism sector is evident, spanning from transportation to visitor choices of accommodation upon reaching the island of Ireland. With increasing awareness of the environmental impact of travel, tourists are, or should be encouraged to, seek more sustainable ways to journey to and explore destinations where possible. Recent research[64] has also suggested tangible ways in which businesses within the industry can adopt more sustainable practices as part of wider circular economy initiatives. From a policy perspective, there is potential for an all-island commitment to sustainability, involving collaboration between NI and ROI to develop unified policies and initiatives focused on environmental stewardship and rewarding excellence in this area. There is an opportunity for both jurisdictions to work together to preserve the natural beauty and cultural heritage of the island while ensuring a sustainable future for tourism.

Quality of jobs & employment

The tourism and hospitality industry relies heavily on a steady pipeline of employees across a variety of occupations and skill levels. As industry standards evolve and customer expectations continue to rise, there is increasing demand for well-trained professionals capable of delivering exceptional service and experiences. There is an on-going need for employers and educational institutions to work collaboratively to provide relevant and up-to-date training programs that equip employees with the knowledge, skills and competencies needed. Raising industry standards through the improved offering good quality, secure jobs with opportunities for career development and the necessary support for staff is essential for attracting and retaining workers in the sector on a long-term basis. The experience of filling vacancies after the pandemic has shown that much more needs to be done in this space at all levels of the industry.

Provision of all island data

Tourism, like the retail sector, is an industry increasingly dependent on rapid data analysis to gain insights into consumer tastes, reviews and spending. There has also been an expansion of both consumer and business sentiment surveying to supplement the harder spend data. This data is critical for understanding a rapidly changing and quickly responsive consumer market.

A further development is that of 'satellite accounts' for tourism which allows comparison of expenditure and trips data across EU countries and, in time, for smaller regions. A regular offering of this data at an all-island level (as was done previously in 2014 using older methods) would provide for a small number of indicators which could measure progress for Northern Ireland, the Republic of Ireland and the island as a whole against competitor markets.

The Longer-Term: the place of tourism in the island economy and the debate on the economics of Irish unity

It was noted above the cross-border cooperation in tourism has a long history but there remains an argument for the deepening and widening of this cooperation. Much can be done in the short-term, possibly by leveraging the more developed sector in the Republic of Ireland, and perhaps benefiting

[63] For more information on this proposal see: https://nitourismalliance.com/electronic-travel-authorisation-update/

[64] InterTradeIreland (2024) Identifying Circular Economy Business Opportunities on the Island of Ireland

from emerging capacity constraints there. However, there have been political constraints to such policy changes. All-island branding of initiatives like the *Wild Atlantic Way* and *Ireland's Ancient East* have been judged to be controversial but would likely bring benefits to parts of NI, especially the North West. There are also issues around policy or legislative remit. In a context of almost full employment, inward migrant labour will be needed, and the post-Brexit UK-wide restrictions mean that the NI Executive currently has no power to respond to that need in the absence of a regional migration policy.

Economic projections into an uncertain future in an unknown time-scale is challenging. However, the stronger performance of the tourism industry in the Republic of Ireland is encouraging, and it has remained consistently larger than the industry in NI in periods of economic growth and recession. The post Good Friday Agreement period has seen many positive human and economic benefits. Productivity in the tourism sector is one where the north-south gap is small, but the differing performance in terms of visitor numbers and expenditure has remained significant. Although the impact of The Troubles on Northern Ireland's tourism sector cannot be understated, in a period of more than 25 years since the Good Friday Agreement perhaps more was hoped for or expected in a context of prolonged peace.

At present the economic contribution of NI's tourism sector, reflects that of the lesser-visited regions in the Republic, as it remains at approximately half the scale of the South West, or about 60% of the West. Yet the heart of the underlying tourist offering in terms of natural beauty, vibrant cities, and welcoming people, is no different. The weaker performance to date is in-part a reflection of a lower starting point given the conflict and legacy of the Troubles in NI, but a stronger convergence is possible through a combination of greater alignment in public policies, higher levels of investment and changing external perceptions. This raises questions for further debate about the extent to which such regional convergence in the performance of tourism could be expected to be enhanced beyond the current levels of cooperation. That is, in the context of a single tourism offering, in marketing, visa-requirements, tax and regional development policy, and most crucially in the perception of the visitor. As an indication of ambition, the current NI Tourism Strategy sets a target growth rate of 6% annually over 10 years, which is double the current rate of growth experienced. The result could be to converge performance in international visitor numbers and expenditure across the island, in turn generating significant economic benefits, including €2 billion in additional GVA, closer to the current per capita performance of the tourism sector in the Republic of Ireland.

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Annex 1 – Consultees

Code	Public/Private	Representation	Jurisdiction
C1	Public sector	Government agency	NI
C2	Private sector	Accommodation providers	NI
C3	Private sector	Hospitality	NI
C3a	Public sector	Training	NI
C3b	Public sector	Training	NI
C4	Public Sector	Training	ROI
C5	Private sector	Hospitality	ROI
C6	Public sector	Government agency (former)	All-island
C7	Private sector	Tour operators	ROI
C8	Private sector	Marketing consultant	All-island
C9	Public sector	Government agency	ROI
C10	Public sector	Government agency	All-island
C11	Private sector	Accommodation providers	ROI
C12	Private sector	Tourism sector generally	ROI
C13	Private sector	Market development consultant	All-island
C14	Private sector	Infrastructure	ROI
C15	Private sector	Infrastructure	NI
C16	Private sector	Accommodation providers	ROI
C17	Private sector	Accommodation provider	NI
C18	Private sector	Hospitality	NI
C19	Public sector	Training	NI

Annex 2 - Definitions

- For the purposes of cross-border comparison international visitors refers to overnight stays by visitors originating from outside of ROI or NI. Those travelling to NI/ROI for day trips will not be included in this analysis.
- Domestic visitors include residents in NI or ROI travelling either within NI/ROI, from NI to ROI or vice versa.
- Air passengers numbers will include NI & ROI residents.
- Wider tourism encompasses proportions of sub-sectors within the following industries: transport, rental & leasing, travel agencies & tour operators, cultural activities, entertainment & recreation activities and sporting activities.

About UUEPC

UUEPC is an independent research centre focused on producing evidence based research to inform policy development and implementation. It engages with all organisations that have an interest in enhancing the Northern Ireland economy. The UUEPC's work is relevant to Government, business and the wider public with the aim of engaging those who may previously have been disengaged from economic debate.

Contact Us (Authors)

Senior Economist: Ana Desmond
a.desmond@ulster.ac.uk
Principal Economist: Dr Eoin Magennis
e.magennis@ulster.ac.uk
Student Economist: Edward Hawkins
e.hawkins@ulster.ac.uk

Centre Administrator: Danielle McKee
d.mckee@ulster.ac.uk

Ulster University Economic Policy Centre

economicpolicycentre@ulster.ac.uk

(028) 90 3 66561

@UlsterUniEPC

https://www.ulster.ac.uk/epc

Ulster University